



THE UNIVERSITY *of* MONTANA WESTERN



Planfile Process

Planfile processing:

Planfiles represent the Level 3 Orgs in Banner, with Level 1 being the highest level or location (University of Montana-Missoula, Helena College of Technology, etc.) and Level 2 being the sectors or areas of authority. The financial manager/s of the Level 3 Org is assigned in different ways. There are Level 3 Orgs that will have different individuals that need to enter information for separate departments. Each will be in a separate Process step that is explained in this guide. Check with the Budget, Planning and Analysis office if you are unsure of how your Planfile is set up.

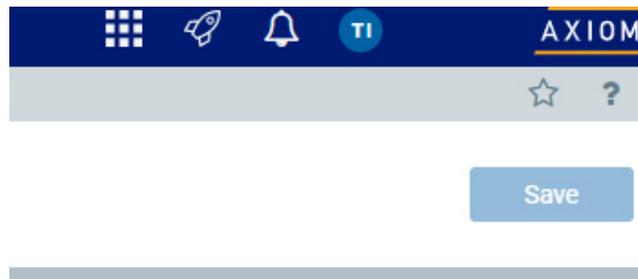
There are **4 process steps** in the Budgeting Planfiles and the Labor Planfiles. Please note that the only “Submit” option is within the Budgeting Module. Those 4 steps in the Budget Planfile are assigned to specific users. Those users can save, submit, reject or approve depending on which step the user is assigned.

There are 4 “process steps” in the Labor Planfiles. This is used to give those users access to the Labor Planning. **The users in these steps can edit and save at any time.** The Labor Planning does not have a submit button.

Planfile process steps:

1. **Step #1, Budget Input:** Also known as edit plan file, this step type allows the step owner to edit the plan file.
 - Owners of Edit Plan File steps have read/write access to plan files, and can save plan data to the database. It is assumed that these owners will be developing plans and making changes to plan files. Owners can submit their files to the next step, but cannot send files back to a prior step. See the section below for more information about submitting the Planfile.
2. **Step #2, Budget Review:** This step type is considered an approval step and it allows the step owner to approve or reject the plan file.
3. **Step #3, Budget Approval:** This step is also considered an approval step and it allows the step owner to approve or reject the Planfile.
 - Owners of Approval steps (Budget Review and Budget Approval) have **read-write access** to plan files. These owners will be reviewing or editing the plan files and then either approving the plan files to send them to the next step, or rejecting the plan files to send them back to a prior step.

Budget Review and Budget Approval users will see the save button in the upper right-hand corner of the screen greyed out.



*NOTE: Saving is still possible for the Budget Review and Budget Approval users and as noted above they can save Labor changes as well.

When the user in the Budget Input step is still entering budget, the users in #2 and #3 step can open indexes (via the Select and Index-Actv screen in the Budgeting module on the Budget tab) and click on the Save button. They are only able to save changes to the operating budget in this manner until the user in the previous step submits. Note*: Transfers can only be entered by the active step owner.

Select a Index - Actv ×

Index	Actv	Reviewed
MUN79G - Forestry Proposed New Bldg Planning	_ - No ACTV Assigned	×
MUN79J - Liberal Arts E Side-Phase IV 19-10	_ - No ACTV Assigned	×
MUN79P - Heating Plnt Combo Heat/Power 18-88	_ - No ACTV Assigned	×
MUN79R - Master Energy Audit 20-108 Tax Exmp	_ - No ACTV Assigned	×
MUN79S - New Dining Facility Planning 21-06	_ - No ACTV Assigned	×

Selecting a new Index - Actv may result in the loss of unsaved changes. Would you like to save MUN79T - _ before proceeding?

Save Don't Save Close

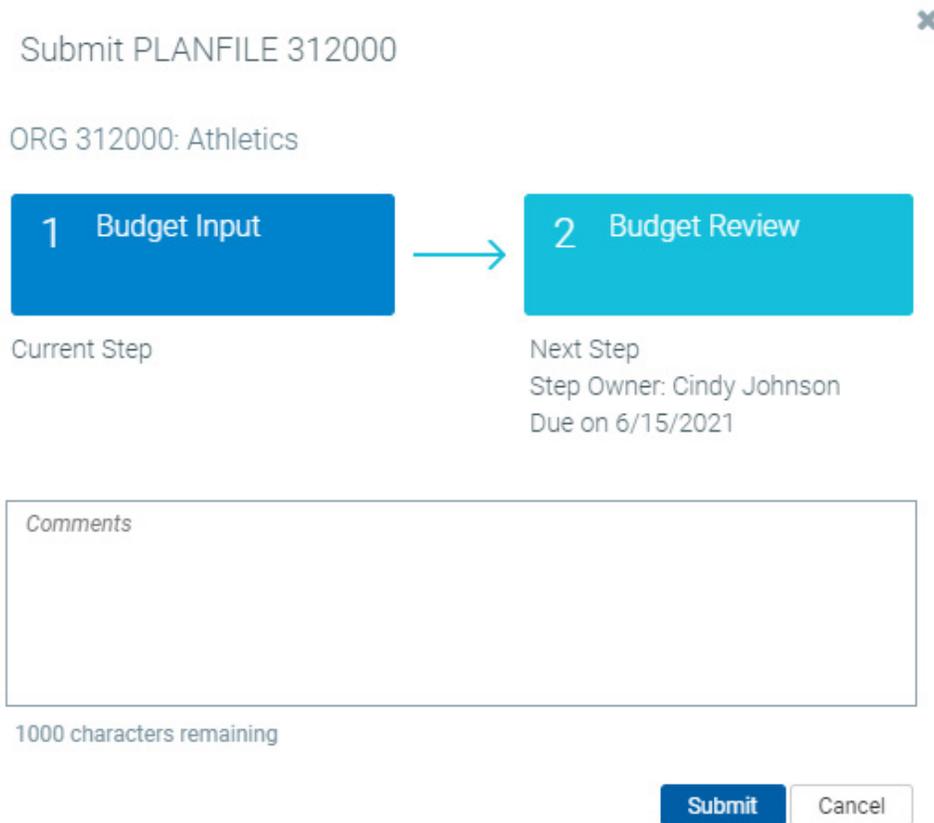
Once the user in the Budget input step has entered all the budget and verified that the labor planning is complete, they should click on the Submit Button. The person in the next step, Budget Review will then be able to see the submit button.



4. **Step #4, Budget Office:** This step is reserved for the UM budget office. It is a final step before the Banner load.

Submitting the Planfile:

A Budget user who submits the Planfile is verifying the underlying Labor Planning within that Planfile is correct. After clicking on the submit button, this window should open:



Enter any comments in the box. This comment will appear in the message to the user assigned to the next step.

Please contact our office at 243-6340 or email financehub@umontana.edu for more information.