



THE UNIVERSITY *of* MONTANA WESTERN



FinanceHUB Budget Request Guide

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Acronyms to note: BPA stands for Budget, Planning and Analysis Office.

Icon Index:



Waffle Icon



Hamburger Stack



Bell Notification



In order: File Attachments, Messages, Tools

Budget Requests:

- There are two types of Budget Requests available in FinanceHUB at this time.
- Divisional Request is used for adding an index or account category that is not available to add budget in your Planfile or a position that is not listed on your Position Planning tab.
- Examples: An index for which you need to add budget does not appear in the list when you click on the hamburger stack on the Budget tab in your Planfile:

MPRT01 - _
☰

Proposed Budget: (\$688,478)

Divisional Request can be used if an Index does not appear in the list below AND you will use existing allocated funds for the budget.

Select a Index - Actv

Index	Actv	Reviewed
MPR003 - Montana Campus Compact	_ - No ACTV Assigned	✘
MPR107 - 2MU President's Student Support Fnd	_ - No ACTV Assigned	✘
MPRS02 - Athletic Representative	_ - No ACTV Assigned	✘
MPRS04 - Tribal Outreach Specialist	_ - No ACTV Assigned	✘
MPRT01 - President's Office - State	_ - No ACTV Assigned	✘

Selecting a new Index - Actv may result in the loss of unsaved changes. Would you like to save MPRT01 - _ before proceeding?

Save
Don't Save
Close

- New indexes set up after the budget workflow has been turned on that do not have budget or expenditures in the previous year will NOT show up in your Planfile.
- A position (pooled or single) that does not have budget or expenditures in the previous year and doesn't show up in your Planfile will need a Budget Request to fill the position.
- Central Budget Request is for contingency funding. The following instructions will provide detail instructions for each type of request, starting with the [Divisional Request](#).
- Budget requests can be found on the **Budget Home Page** under the **Budget Requests Tab**


↓

BUDGETING		LABOR PLANNING		BUDGET REQUESTS	
Request Name			One-Time Expenses		
Test Request IT			\$5,000		
Add budget to Index MEDI18			\$12,000		

NOTE: Budget requests do not exist until you make them, so you will not see any budget requests populated when you open the **Budget Requests Tab** until a budget request is submitted.

Budget Request (Divisional Request):

Adding New Divisional Request:

To start a new budget request, click on the  button on the right-hand corner of the screen. **Please provide a descriptive Request Name.** Include the Index/Department/Sector or Sector/Department and Position number so you can easily identify the requests.

New Budget Request ×

Populate the fields below to create a new budget request for fiscal year 2022

Request Name: (100 character max.)

Select Owing Org:

Select Index: Select Actv:

Request Type(s):
 Divisional Request
 Central Budget Request

- Select the Level 3 Org for which the request belongs, enter the Index and Activity Code. (Activity code is required, select *-No ACTV Assigned* if you do not need an activity code)
- You can search for a Level 3 Org, Index and Activity Code by typing in words, partial words or numbers then clicking on the name or using the down arrow to select. (you cannot just type in the index and tab, you must select and enter by clicking or hitting the enter button.)
- It will also ask you to select the type of request – **Divisional Requests** are explained in this guide.
- Budget requests go through their own workflow in addition what your plan files go through. The steps in the workflow process are determined by the type of request.
- Click Create Request and then OK to create a new Budget Request.

Example 1: Requesting budget for index that is not included in your Planfile

General Tab:

- Once the request has been created, it will bring you to the budget request plan file that will prompt you to fill out additional information.

Budgeting

☰ 📎 🔧

Add Budget for new Index MSA012 | Budget Request 2022

GENERAL	SCHEDULES	NARRATIVES	
Request Name:	<input type="text" value="Add Budget for new Index MSA012"/>		
Request ID:	7		
Created By:	Cindy Johnson		
Created Date:	4/20/2021		
Sponsor (Contact):	<input type="text" value="Financial Manager"/>		
Owning Org:	341000		
Index:	MSA012		
Actv:	-		
Approval Status:	Pending		
Request Description: (250 character max.)			
<input type="text" value="Adding budget for new index. Budget is part of allocation. New index is for establish designated fund for fees collected and expenses related to a new"/>			
Request Type(s):			
Divisional Request	<input checked="" type="checkbox"/>		
Central Budget Request	<input type="checkbox"/>		
Request Categories:			

- You can change the request name on this screen. You can also enter a sponsor. The sponsor should be the person responsible for fielding questions from approvers. *NOTE: the sponsor and the creator of the request do not have to be the same person.*
- On this screen, you will also be able to type in a description of the request. You only have 250 characters to write a description, so if more detail is necessary you can attach a document to the request file through the file attachments.

Budgeting

☰ 📎 🔧

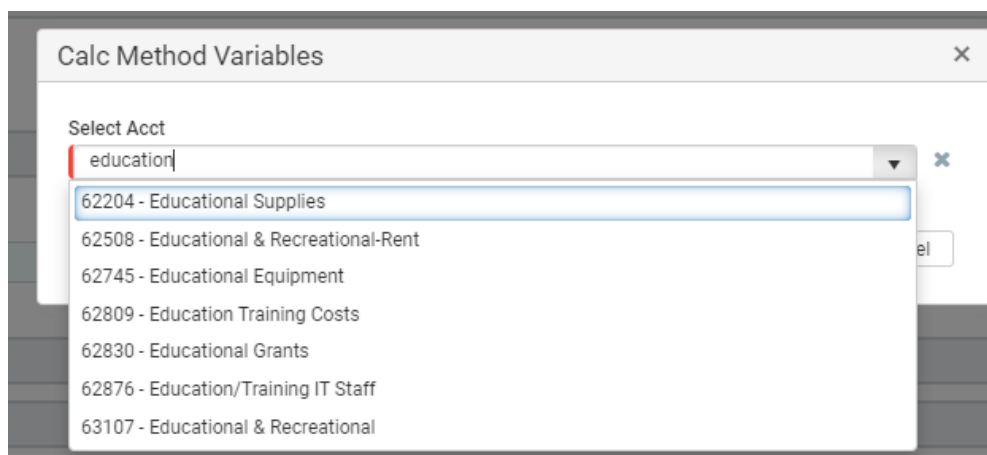
File Attachments ➡

Schedules Tab:

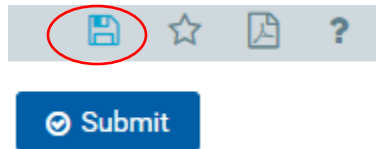
- After you have completed the necessary information, navigate to the **Schedules Tab**. This is where you will enter in the account level information for your request. ***You must enter budget amounts in this section or you will not see the index in your Budget.**

Account	Index	Activity	Proposed Budget 2022
Revenue			
50073 - Student Support Fee	MSA012	-	50,000
+ Add Revenues Account			
Total Revenue			50,000
Personnel Expense			
+ Add Personnel Expense Account			
Total Personnel Expense			0
Operating and Capital			
62817 - Meetings & Conference Costs	MSA012	-	25,000
+ Add Direct Expenditures Account			

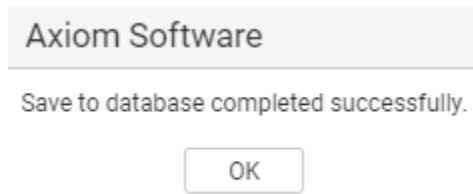
- Click on the account category you are requesting.
- For example, if you click on “Add Direct Expenditure” it will prompt you to enter the desired account code.
- NOTE: You can type the account code number, name or partial name into the search bar and it will populate for you. (Arrow down to your selection and hit enter or click on your selection, you cannot just type and hit enter.)



- After you click **Apply**, you will have the opportunity to fill out more detailed account level information. This will include; index, activity code, proposed budget, recurring expense and spread (even or 10 months). It will also allow you to plan for out years (if applicable). You can also add a comment at the end with reasoning, if you wish.
- When adding budget for an index, **do not** enter budget in the salary and benefits account codes. **Please prepare a separate Budget Request to add a position.**
- Changes can be made to the index and activity code from what you originally entered, if needed. If changed, the index must still roll up to the Level 3 Org assigned to the budget request. Make sure you change the Request Name and description as well.
- You can add as many account codes to the budget request as you need. Once you have completed your work click **Save** in the upper right-hand corner.



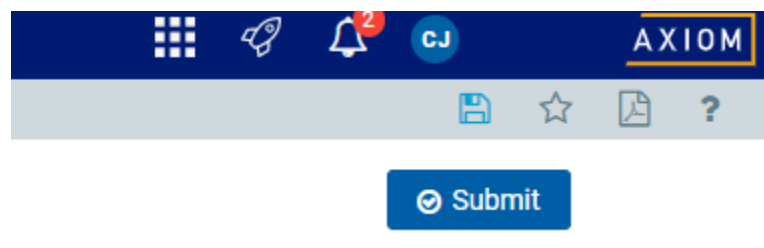
- You will receive a confirmation after saving.



- NOTE: Before you submit your request, check the **Narratives Tab**.

Narratives Tab:

- If applicable, the BPA Office will have questions for you to answer on the **Narratives Tab** before submitting your request. You have 500 characters to respond to each question.
- As before, if more detail is needed, attachments can be included on the budget request file.
- **In the Narratives tab, there is a 5th box called Additional notes. You can add more information in this box as well.**
- Click on Submit when finished.



Example 2: Requesting a position to be added to your Planfile

NOTE: If you are trying to add budget for a pooled position, please check that it is not already showing up in the Other Labor – Pooled Positions tab. Users can add distributions (Index, Actv., Account) to the pooled positions.

OVERVIEW	POSITION PLANNING	DISTRIBUTION SUMMARY	OTHER LABOR			
Pooled Positions	Other Labor Accounts					
Delete	Pooled Position	Orgn	Actv	Index	Acct	Actual 2020

If you do not see the pooled position in your list, check in Banner that it exists or contact HR to build the pooled position needed.

General Tab:

- Enter a descriptive Request Name and Request Description.

Budgeting

President: Add Posn 000101 | Budget Request 2022

GENERAL	SCHEDULES	NARRATIVES
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Request Name: President: Add Posn 000101

Request ID: 8

Created By: Cindy Johnson

Created Date: 4/20/2021

Sponsor (Contact): Financial Manager

Owning Org: 311000

Index: MPRT01

Actv: -

Approval Status: Pending

Request Description: (250 character max.)

Add Position 000101 Bob Jones 1.0 FTE, \$50,000 start date 8/1/20221

Request Type(s):

Divisional Request

Central Budget Request

Request Categories:

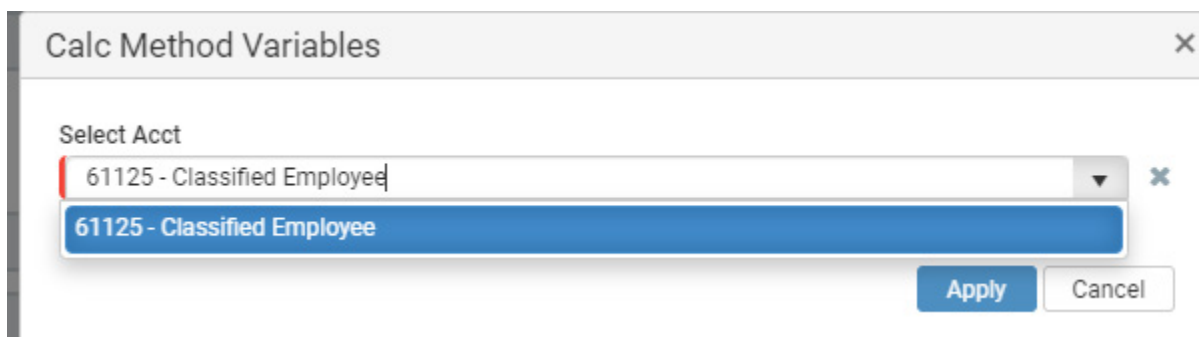
Schedules:

Add the account codes and benefit amounts for the expenses related to the position.

- For the example position above you would need to add the budget for the labor and the benefits including insurance.

The position above is 1.0 FTE for \$50,000 starting 8/1/2021. That is 11 months of wages for \$45,833. Average benefits for classified staff are 18.5% equals \$8,479, 11 months of health insurance is \$11,594.

- Total wages = \$45,833 and Benefits are 8,479 + 11,594 = 20,073
- Click on the Add Personnel Expense, a window will pop up for the account code. 61125 is the classified account code.



Calc Method Variables

Select Acct

61125 - Classified Employee

61125 - Classified Employee

Apply Cancel

- Click Apply and then enter the insurance and benefits:

Personnel Expense

61125 - Classified Employee	MPRT01	-	50,000
61403 - Group Insurance	MPRT01	-	11,594
61418 - Faculty/Staff Benefit	MPRT01	-	8,479

Note: Do not select 61499 for the other benefits. That account is reserved. Use 61418 for the other benefits.

- You can add comments on the line items at the end.



Comments

Bob Jones 1.0 FTE Classified, 8/1/2021 hire date

Health Ins. Bob Jones Posn 000101

Benefits Classified @ 18.5% B.Jones Posn 000101

Narratives Tab:

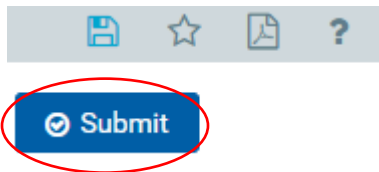
- If applicable, the BPA Office will have questions for you to answer on the **Narratives Tab** before submitting your request. You have 500 characters to respond to each question.
- As before, if more detail is needed, attachments can be included on the budget request file.
- In the Narratives tab, there is a 5th box called **Additional notes**. Please use this box to enter any other information. If there are special circumstances, like a second position, split positions or for amounts less than a full year, **PLEASE** explain calculations used.

- Click on the save icon.



Submit Request/Workflow:

When you are ready to submit your budget request, click **Save** and then **Submit**



- After submission, it will look at the workflow steps and show you the next approver in the workflow process.
- On this screen, you can also leave that approver a comment. This comment will display to the approver in their notification to review the request. You have up to 1,000 characters for comments.
- Once you are ready, click **Submit** again.

Submit REQUEST_ID 8



Add Posn. 000101 Bob Jones

1 Submit Budget Request



2 Budget Request Review

Current Step

Next Step

Step Owner: Cindy Johnson

No due date

This position is part of allocation, replaces position 000501 and position 000411.


918 characters remaining

Submit Cancel

This will bring you to the workflow screen. This screen shows you all the steps your budget request will take before approval including where it is at within the workflow process.

Budget Impact:

Budget requests that have been submitted will impact your Org's budget plan file under specific views. To find these views, navigate back to your Org's plan file and the Budget Tab.

Open the index that you used in the [Schedules](#) section of the Budget Request and click on the  icon on the right-hand side. You have two options when viewing budget requests – Pending/Approved and Approved only.

Column Views

- Plan View
- Planning Months
- Out Years

Budget Requests

- Pending/Approved
- Approved Only
- None

OK

When you click on one of these, in this example, Pending/Approved, you will notice additional columns on the budget plan file. These are **Budget Requests One-Time** and **Budget Requests Recurring**. These columns are where you will see the impact of your budget request.

MPRT01 - _ Proposed Budget: (\$688,478)	2020 Actual \$(870,503)	
Budget Group	Annualized 2021	Budget Starting Point 2022
▶ Revenue		
Total Revenue	1%	0
▶ Personnel Expense		
▼ Salaries and Wages	7%	608,124
61124 - Contract Professional	2%	205,112
61125 - Classified Employee	3%	76,593
61128 - Contract Administrator	3%	316,271
61131 - Classified Employee-Overtime	0%	1,833
61132 - Contract Faculty-Extra Comp	0%	0
61133 - Termination Pay-Sick Leave	0%	0
61134 - Termination Pay-Vacation	0%	0
61165 - Classified Employee-Lump Sum Merit	0%	0
61224 - Hourly-Non Classified Employee	0%	0
61225 - Student	0%	6,683
61226 - Student Work Study-Federal	0%	84
61311 - Communication Device Allowance	5%	1,548
+ Add Salaries and Wages		
▶ Employee Benefits	0%	173,710
Total Personnel Expense	1%	781,834

When you scroll over you will see your budget Requests:

Proposed Budget 2022	Budget Requests 2022 One-Time	Budget Requests 2022 Recurring	Total Budget 2022	Comments
0	0	0	0	
583,079	50,000	0	633,079	
161,282	0	0	161,282	
88,743	50,000	0	138,743	Bob Jones 1.0 FTE Classified, 8/1/20221 hire date
333,054	0	0	333,054	
0	0	0	0	
0	0	0	0	
0	0	0	0	
0	0	0	0	
0	0	0	0	
0	0	0	0	
0	0	0	0	
0	0	0	0	
0	0	0	0	
0	0	0	0	

Central Budget Requests are used when there is contingency funding. Instructions for those type of requests are under construction.

If you have questions, please call the Budget, Planning & Analysis Office at 243-6340 or email financehub@umontana.edu. Thank you.