Budget Allocation Process

Academic Planning & Budgets

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Budget Scenarios

BASE	Beginning base budget
BASEADJ (Base Adjustment)	Base adjustments from the University and/or Chancellor's Office after the beginning base budget is uploaded
DBASEADJ (Division Base Adjustment)	Division initiated adjustments to the base
ONETIME	One-time budgets from the University and/or Chancellor's Office (e.g. CPOs)
CAMPUSADJ (Campus Adjustment)	One-time budget allocations initiated by campus departments, including all transactions done via FTS

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Budget Ledgers

STDBUDG (Standard Budget Group)	All base and one-time transactions for a selected fiscal year
FUTUREBUDG (Future Budget)	All base and base adjustments for future fiscal year

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Mapping

BUDGET SCENARIO	BUDGET LEDGER
BASE	Standard, Future
BASEADJ	Standard, Future
DBASEADJ	Standard, Future
ONETIME	Standard
CAMPUSADJ	Standard

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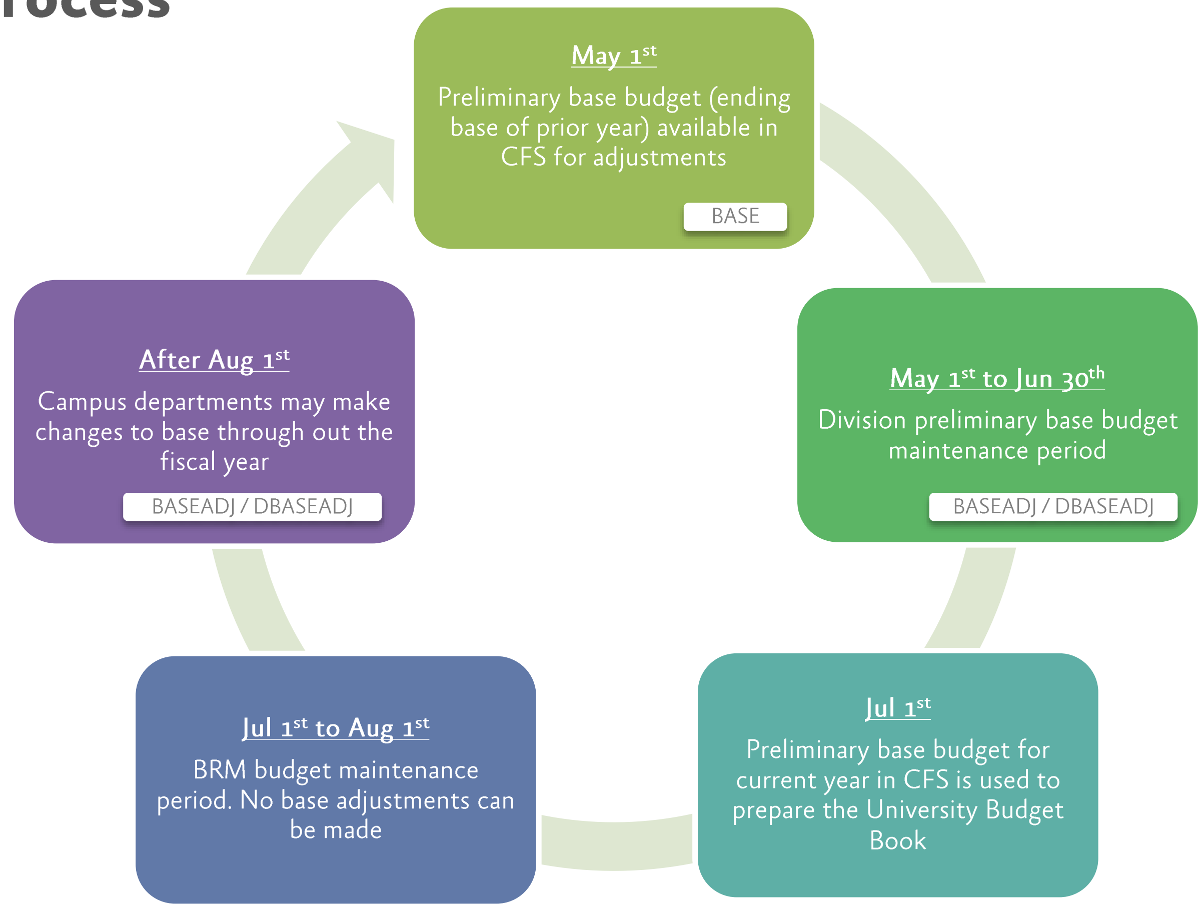
Current Process



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Advantages of allocating base via DBASEADJ

- Base budgets and adjustments only need to be posted once
- Enhance budget transparency
- Preliminary base budgets are always available at the start of a fiscal year
- Clear distinction between Base and One-Time down to department level

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Base Budget Upload Template

Account	Fund	Dept	Program	Class	Project	Scenario	Line Description	Stat	Stat Amt	Open Item	Jrnl Line Ref	Amount
Required- 6 digits	Required- 5 digits	Required- 4 digits	Optional- 3 digits	Optional- 4 digits	Optional– 5 to 12 characters	~~Required- CAMPUSADJ~~	Optional though recommended- Maxiumum 30 characters	For Central Finance Use Only (Leave blank)	For Central Finance Use Only (Leave blank)	For Central Finance Use Only (Leave blank)	Optional- Maximum 10 characters	Required- Format number with no comma, no curency, and two decimal places and no currency format. **Debit** amount is reflected as a **positive**. **Credit** amount is shown as a **negative**.

Use "DBASEADJ" as the Scenario

Examples of base adjustments to be posted using DBASEADJ:

- Allocating base budgets to department level
- Compensation adjustments – e.g. GSI, SSI, etc.
- Resource redistributions at base level

Submit a balanced template to BRM for upload to be posted on both Standard and Future Ledger. - IMPORTANT!!

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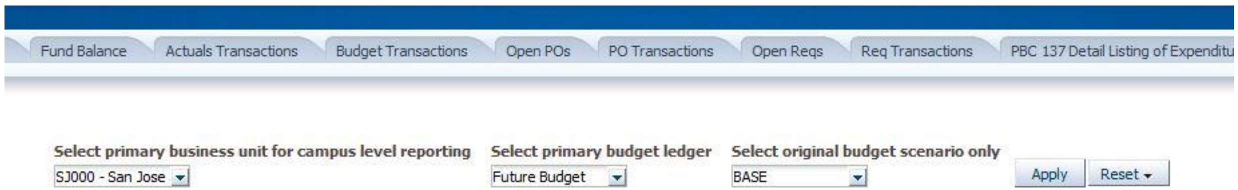
Viewing Your Running Base Budget in CFS



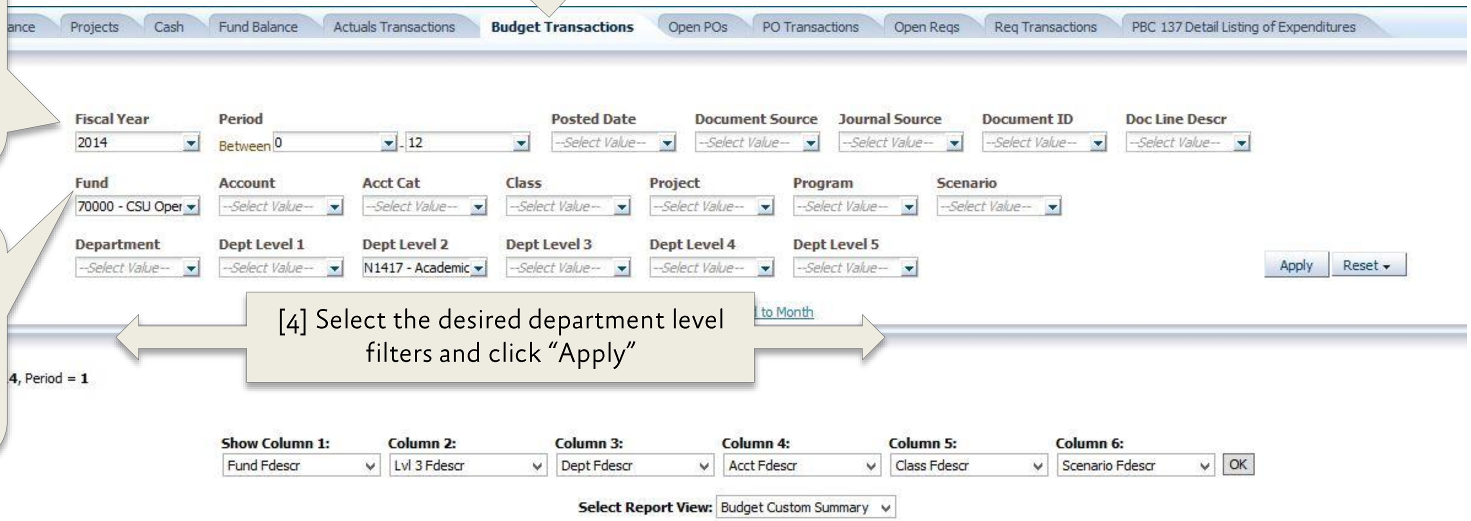
Select "Future Budget" as your primary budget ledger and click on the "Apply" button

Viewing Your Running Base Budget in CFS – Cont'd

[1] View report in the "Budget Transactions" tab

[2] Select a future fiscal year and accounting period between 0 and 12.

[3] Select the desired fund, or leave blank to show all *budget funds*, including SSETF.



[4] Select the desired department level filters and click "Apply"

[5] Setup the 6-column customization
It is recommended that you give 1 column for "Class" and 1 for "Scenario" to get the most out of the report and click "OK"