



UCOP Planning and Budgeting System (PBS)

DPA100: Decision
Package Approval

Current as of March 2020



Here is the agenda for today's session.

Lesson	Covered Topics / Processes
Approval Form	<ul style="list-style-type: none">• Viewing the Approval form• Checking Impact on Budget – Decision Package• Decision Package review by Request Type
Decision Package Review	<ul style="list-style-type: none">• Review the Summary• Approving/Rejecting the Request



Delivery Type:

ILT



Prerequisites:

BUDEXP100
DRP100



Duration

1 hour 50 minutes



SME Reviewers

Rohit Baxi (Deloitte)
Glenn Roth (Deloitte)
Nicole Terrell (UCOP)
Dave Baltaxe (UCOP)
Craig Kitaoka (UCOP)

Upon completing this course, you will be able to:

- Explain the key changes in the Decision Package Approval process
- Understand the 4 new Priority categories and their function
- List the components of the Decision Package Approval module in PBS
- Set up Point of View for the Decision Package Approval module in PBS
- Manage approval/rejections or edits of the Decision Package Requests
- Study the impact of Decision Package Requests on Budget
- Plan Fund and Account Allocations for Decision Package Requests
- Review the summary of all Decision Package Requests

Here are some of the key terms you will come across in this course.

Decision Package Request (DP Request)	A Request raised by Decision Package Requestor for approval process .
Request Type	The type of request that has been submitted by requestor for approval.
Priority	Priority of the request that needs to be approved and reviewed.
Allocation	Refers to the process of the funding sources and uses by account for each of the decision package request.

Let us meet the roles involved in the Decision Package Approval process in PBS.



John Doe
Reviewer

Responsibilities:

- Manage approval of budget for new Decision Package Requests
- Manage allocation for the Budget requested for Decision Package request
- Manage approval of request made by the Decision Package requestor

User will now be able to use PBS to:

- Review the Request made by the Decision Package Requestor
- Approve/Reject the Decision Package request
- Allocate the Budget Requested across different funds and Accounts

Components of Decision Package Approval Module in PBS

The Decision Package Approval module in PBS consists of two components.

1. Approval Form

- a) Viewing the Approval Form
- b) Checking the Impact on Budget
- c) Review Decision Package by Request Type

2. Decision Package Review

- a) Decision Package summary
- b) Approving/Rejecting the request

Components of Decision Package Approval Module in PBS

The following table lists the key points about each component of the Decision Package Approval module.

Components		Key Points
	POV Setup	Reviewers choose dimensions to create their Point of View (POV) while conducting reviewing activities.
	Unit Assignment	Reviewers will begin in the Unit they are assigned to, but can be assigned to the unit that will be reviewing for.
	Request Review	For existing requests, reviewers will review the total Budget requested for the request and their allocation across different combination of fund and accounts by the requestor. If needed, reviewer can also change the allocation.
	Budget Impact	Reviewers can check the impacted budget after taken into consideration the Budget for the request.
	Request Reviewing by Request Type	Reviewers can also review the requests by request types which was selected by the requestors while raising the request.
	Final Decision Package Summary	Reviewers will review the final summary of the complete Decision Package.
	Approve/Reject the request	Reviewer will then accept/reject the request through approval hierarchy and then changes will be reflected for requestor.

Approval Form

Duration: 50 minutes

Lesson: **1** 2

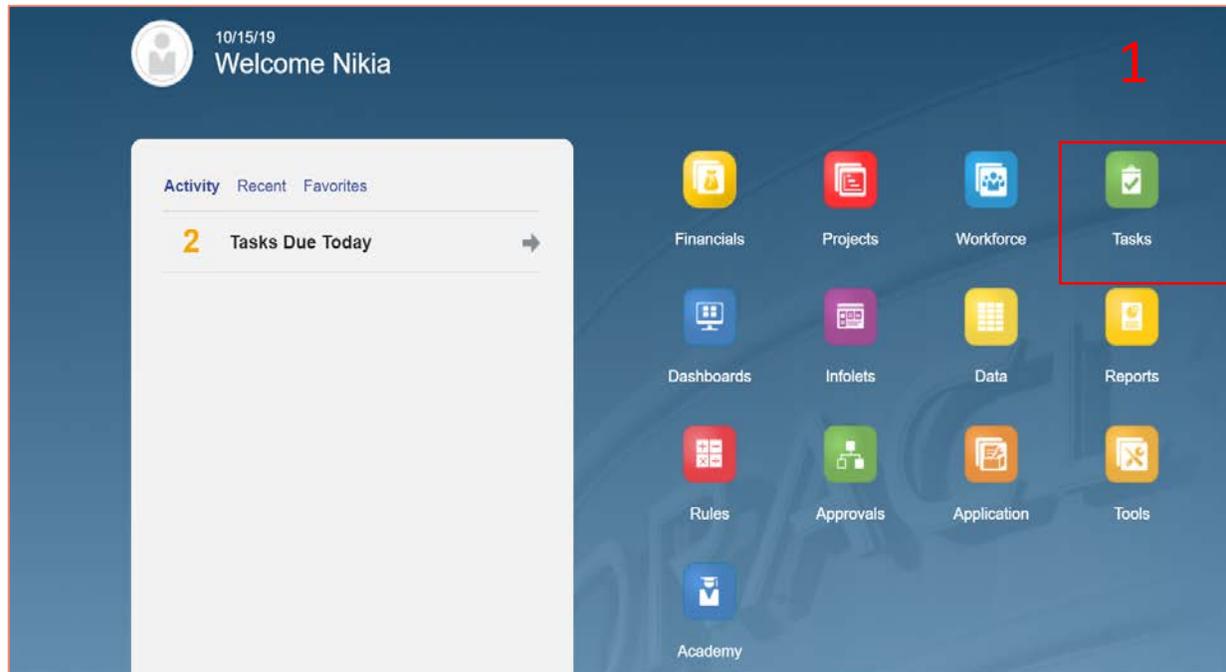
Upon completing this lesson, you will be able to:

- Review the Request made by the Decision Package Requestor
- Allocate the Budget Requested across different funds and Accounts
- Review the Impact of Decision Package Request on Budget
- Review the Decision Package by Request Type

Decision Package Approver – The Decision Package Approver task provides the ability to approve or reject submitted Decision Package Requesters for various Units.

Navigation:

1. Access Tasks tile from the home screen. The Tasks List page will be displayed.
2. Expand the Decision Package Approver task



Name	Status	Start	End	Instructions	Action
▶ Admin User	●			ⓘ	⋮
▼ Planner	●			ⓘ	⋮
▶ Forecast	●			ⓘ	⋮
▶ Budget	●			ⓘ	⋮
▶ Budget Summary	●	11/1/19	5/28/20	ⓘ	⋮
▶ Reviewer	●			ⓘ	⋮
▶ WF_DataLoad	●			ⓘ	⋮
▶ Decision Package Requester	●			ⓘ	⋮
▶ Decision Package Approver	●			ⓘ	⋮

Decision Package Approver

Navigation: Approval Form

1. Select the Approval Form task
2. View the submitted request by unit on the Approval Form

▼ Decision Package Approver ●

Approval Form 1 ●

Budget Impact - Decision Package ●

Approval Form ⓘ 2

Save Refresh Actions Complete Previous Next Close

Scenario	Years	Unit	No Fund	No Fund	No Fund	No Fund	No Fund	Total Fund - Regent	Total Fund - Regent	Total Fund - Regent	
Perm Budget	FY19-20	1561020:UC GSHIP/USHIP Insurnc Starting Fy13-14	Priority Number	Attachment	Rank	Budget Required	Approval Status	Required FTE	Expenses	Revenues	Budget Approved
Program Related	Request 1	Priority 3 - New Request, Highest Priority			1	10,000	Approved	14	17,040	12,720	4,320 ▲

Decision Package Approver

Navigation: Approval Form

1. On the Approval Form, locate the Approval Status field.
2. Choose an entry from the Approval Status field to approve or reject the request

Note - Once the request has been approved, the approved budget will be accumulated with the base budget.

The screenshot shows the 'Approval Form' interface for a request. The table below has a red box around the 'Approval Status' column header and a red '1' in the first row of that column, indicating the field to be interacted with.

Scenario	Years	Unit								Data	Ad hoc	Format
Perm Budget	FY20-21	3029010:UCOP Local Human Resources Ofc	No Fund	No Fund	No Fund	No Fund	No Fund	No Fund	No Fund	No Fund	To	
			Description	Strategic Priorities Funds	Duration	Priority Number	Attachment	Rank	Budget Required	Approval Status		
Personnel Cost	Request 1	st_PC	Yes	One time only	Priority 3 - New Request, Highest Priority				1			

The screenshot shows the 'Approval Form' interface after the 'Approval Status' dropdown menu has been opened. The 'Approved' and 'Rejected' options are highlighted in red, with a red '2' next to them, indicating the selection step.

Scenario	Years	Unit								Data	Ad hoc	Format
Perm Budget	FY19-20	1581020:UC GSHIP/USHIP Insurnc Starting Fy13-14	No Fund	No Fund	No Fund	No Fund	No Fund	No Fund	Total Fund - Regent	Total Fund - Regent	Total F Reg	
			is Funds	Duration	Priority Number	Attachment	Rank	Budget Required	Approval Status	Required FTE	Expenses	Reve
Program Related	Request 1		One time only	Priority 3 - New Request, Highest Priority			1	10,000	Approved	14	17,040	

Entries

Search

Name

Approved

Rejected

Navigation: Approval Form

1. Right click on the request and select Decision Package Edit from Action Menu.

The screenshot displays the 'Approval Form' interface. On the left, there is a metadata table with the following data:

Scenario	Years	Unit
Perm Budget	FY20-21	3011050:Uc

Program Related	Request 1
Contract	Request 1
Personnel Cost	Request 1
Ongoing Expense	Request 1

The main area shows a table with columns: 'ic Priorities Funds', 'Duration', 'Priority Number', 'Attachment', 'Rank', 'Budget Required', and 'Ap S'. The table contains the following data rows:

ic Priorities Funds	Duration	Priority Number	Attachment	Rank	Budget Required	Ap S
	One time only	Priority 1 - Approved Decision Memo			30,000	Ap
	One time only	Priority 3 - New Request, Highest Priority		2	40,000	Ap
	One time only	Priority 1 - Approved Decision Memo			40,000	Ap
	One time only	Priority 3 - New Request, Highest Priority		1	20,000	

An action menu is open over the first row, with 'Decision Package Edit' highlighted in a red box. A red '1' is placed next to the 'Edit' option in the menu. The menu items include: Edit, Adjust, Supporting Detail, Change History, Lock/Unlock Cells, Filter, Sort, Analyze, New Ad Hoc Grid, Predictive Planning, Business Rules, and Smart Push Details. The top navigation bar includes buttons for 'Save', 'Refresh', 'Actions', 'Complete', 'Previous', 'Next', and 'Close'.

Decision Package Approver



Navigation: Approval Form

1. Edit the data against different intersection of fund and account.
2. Click on Save to save the data.

Note: If the allocated amount is not equal to the Budget Required it will highlight it in **Red**.

Approval Form i

Save Refresh Actions Complete Previous Next Close

2.0 UCOP - Approval Form > 2.1 UCOP - Data Updation Form

Years	Unit	Function	Plan Element						
FY20-21	3011050:Ucpath Ctr:Production	Program Related	Request 1						
				No Fund	Restricted	Designated	Unrestricted	18329:Cccco C15-0070 Holmes-Sullivan 02/18	Total Fund - Regent
Description	Expense on Program								
Priority Number	Priority 1 - Approved Decision Memo								
Strategic Priorities Funds	Yes								
Duration	One time only								
Budget Required		30,000	6,520	7,520	7,520	8,440	30,000		
Revenues			2,000	1,000	1,000	80	4,080		
40000A:Student Tuition & Fees Input			2,000	1,000	1,000	80	4,080		
40500A:Contracts and Grants (non-Capital) Input									
41000A:Sales and Services -Educational Input									
43000A:Sales and Services -Auxiliary Input									

1

Budget Impact – Decision Package– The Decision Package Approver task provides the ability to view the budget impact of the approved request.

Navigation:

1. Access Tasks tile from the home screen. The Tasks List page will be displayed.
2. Expand the Decision Package Approver task and select Budget Impact – Decision Package

The screenshot shows the user interface for the Decision Package Approver. On the left, the home screen displays a 'Tasks Due Today' widget with a red '2' and a grid of application tiles. The 'Tasks' tile is highlighted with a red box and a red '1'. A red arrow points from the 'Tasks' tile to the right-hand screenshot. The right-hand screenshot shows the 'Tasks: All Task Lists' page with a table of tasks. The 'Budget Impact - Decision Package' task is highlighted with a red box and a red '2'.

Name	Status	Start	End	Instructions	Action
Reviewer	●				⋮
WF_DataLoad	●				⋮
Decision Package Requester	●				⋮
Decision Package Approver	●				⋮
Approval Form	●				⋮
Budget Impact - Decision Package	●				⋮

Navigation: Budget Impact – Decision Package

1. Review the Budget Impact – Decision Package form to view for the base budget, additional approved budget request, and the accumulated budget.

Budget Impact - Decision Package 1				Save Refresh Actions		Complete Previous Next Close		
Years	Unit	Fund				Data	Ad hoc	Format
FY19-20	1561020:UC GSHIP/USHIP Insurnc Starting Fy13-14	Total Regents Fund						
	YearTotal	YearTotal	YearTotal					
	Budget	Budget	Budget					
	Working	Working	Working					
	Total	Budget Request	Total Plan					
	40000A:Student Tuition & Fees Input		9,720	9,720				
	40000A:Student Tuition & Fees		9,720	9,720				
	40500A:Contracts and Grants (non-Capital)		3,000	3,000				
	Operating Revenue		12,720	12,720				
	Total Revenues		12,720	12,720				
	Expense Categories Reporting		17,040	17,040				
	Required FTE		14	14				

Decision Package Approver

Navigation: Budget Impact – Decision Package

- To view the budget impact, search or enter the unit from the Budget Impact - Decision Package form.

Budget Impact - Decision Package

 Complete

Years	Scenario	Unit	Fund					
FY20-21	Budget	1561020:UC GSHIP/USHIP Insurnc Starting Fy13-14	Total Regents Fund					
		Total	Budget Request	Total Plan				
		YearTotal	YearTotal	YearTotal				
Salaries		745,333		745,333				
Benefits		222,548		222,548				
Other Office Miscellaneous		(70,917)		(70,917)				
Meetings, Travel and Related Expenses		46,704		46,704				

Select a Member

Unit
"1561020:UC GSHIP/USHIP Insurnc Starting Fy13-14"

1561020

Total Financial Unit	All Financial Unit		
All Financial Unit	100000A: Office of the Presid...		
Global	150000A: Chief Financial Offi...		150000A: Chief Financial Offi...
	200000A: VP - Office of the N...		151000B: Associate VP Budget ...
	250000A: Provost & Exec VP-Ac...		152000B: AVP-Financial Accoun...
	300000A: Chief Operating Offi...		153000B: Chief Financial Offi...
	350000A: External Relations a...		154000B: Systemwide Procureme...
	400000A: Exec VP UC Health		155000B: Capital Asset Strate...
	500000A: Sr VP Compliance and...		156000B: Chief Risk Officer

Navigation: Budget Impact – Decision Package

1. After selecting the unit, search or enter the fund from the Budget Impact - Decision Package form to view the unit & fund budget impact.

Budget Impact - Decision Package 🔍 👤 Save Refresh Actions ☐ Complete Previous Next Close

Years FY20-21	Scenario Budget	Unit 1561020:UC GSHIP/USHIP Insurnc Starting Fy13-4	Fund Total Regents Fund	✎	⚙️	Data	Ad hoc	Format
------------------	--------------------	--------------------------------------------------------	----------------------------	----------------	-----------------	------	--------	--------

	Total	Budget Request	Total Plan					
	⊕ YearTotal	⊕ YearTotal	⊕ YearTotal					
Salaries	745,333		745,333					
Benefits	222,548		222,548					
Other Office Miscellaneous	(70,917)		(70,917)					
Meetings, Travel and Related Expenses	46,704		46,704					

2. Click Ok

Select a Member 👤 OK Cancel

Fund

Search Fund ⚙️

Fund	Total Regents Fund	Total Fund - Regent
Total Regents Fund ▶	Total Fund - Regent ▶	Total Restricted Fund - Regent ▶
	RF1_Unmapped ▶	Total Unrestricted Fund - Reg... ▶

Decision Package Approver



Navigation: Budget Impact – Decision Package

1. After reviewing the Budget Impact – Decision Package form select close or next to proceed to the next step.

1

Budget Impact - Decision Package ⓘ

🔍
👤
Save
Refresh
Actions ▾
 Complete
Previous
Next
Close

Years
FY19-20

Unit
1561020:UC GSHIP/USHIP Insurnc Starting Fy13-14

Fund
Total Regents Fund

✎
⚙️
Data
Ad hoc
Format

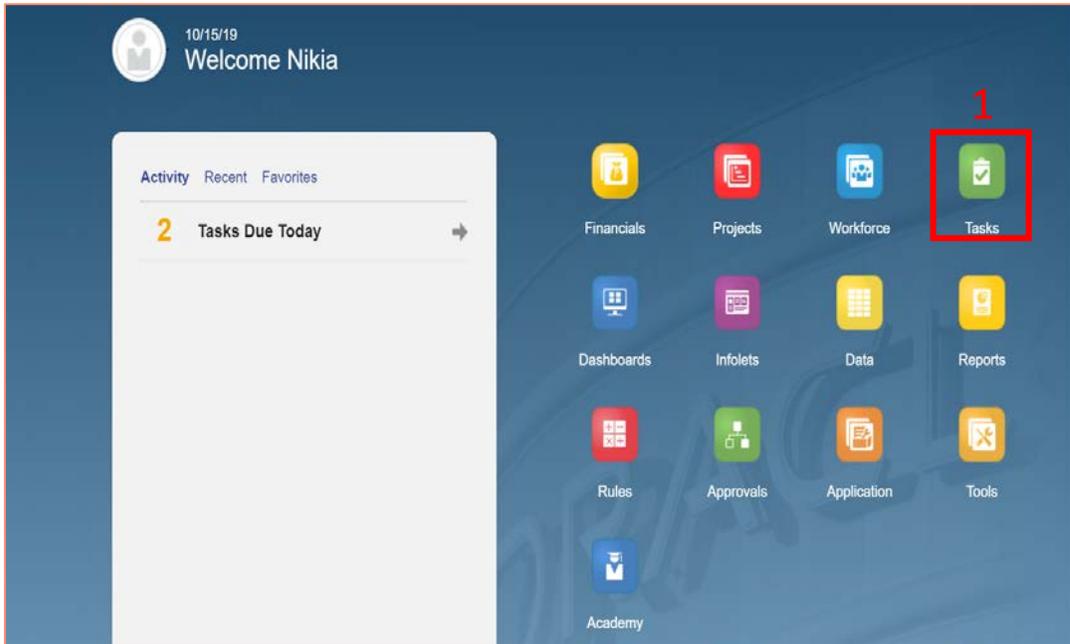
	+ YearTotal	+ YearTotal	+ YearTotal				
	Budget	Budget	Budget				
	Working	Working	Working				
	Total	Budget Request	Total Plan				
40000A:Student Tuition & Fees Input		9,720	9,720				
[-] 40000A:Student Tuition & Fees		9,720	9,720				
[-] 40500A:Contracts and Grants (non-Capital)		3,000	3,000				
[-] Operating Revenue		12,720	12,720				
[-] Total Revenues		12,720	12,720				
[-] Expense Categories Reporting		17,040	17,040				
Required FTE		14	14				

Decision Package Approver

Decision Package Review by Request Type:

Navigation: This task is to approve request. Request can not be modified once approved.

1. Access Tasks tile from the home screen. The Tasks List page will be displayed.
2. In the task list select Decision Package Approver to expand the task.
3. Select the Decision Package Review by Request Type task to began the reviewal process.



The screenshot shows a table titled 'Tasks: All Task Lists' with a 'Filter: All' dropdown and a 'Refresh' button. The table has columns for Name, Status, Start, End, Instructions, and Action. The 'Decision Package Approver' and 'Decision Package Review by Request Type' rows are highlighted with red boxes and the numbers 2 and 3 respectively.

Name	Status	Start	End	Instructions	Action
Reviewer	●			ⓘ	⋮
WF_DataLoad	●			ⓘ	⋮
Decision Package Requester	●			ⓘ	⋮
Decision Package Approver	●			ⓘ	⋮
Approval Form	●			ⓘ	⋮
Budget Impact - Decision Package	●			ⓘ	⋮
Decision Package Review by Request Type	●			ⓘ	⋮

Navigation: Decision Package Review by Request Type

1. To view the budget impact by unit, search or enter the unit from the Decision Package Review by Request Type form.

Decision Package Review by Request Type 🔍 👤 Save Refresh Actions Complete Previous Next Close

Scenario: Perm Budget | Years: FY19-20 | Unit: 1561020:UC GSHIP/USHIP Insurmc Starting Fy13-14 **1** ⚙️ Data Ad hoc Format

		UNRESTRICTED	DESIGNATED	RESTRICTED	Total				
Program Related	Request 1	1,520	(160)	2,960	4,320				
	Total	1,520	(160)	2,960	4,320				

Select a Member OK Cancel

Unit: "1561020:UC GSHIP/USHIP Insurmc Starting Fy13-14"

1561020|

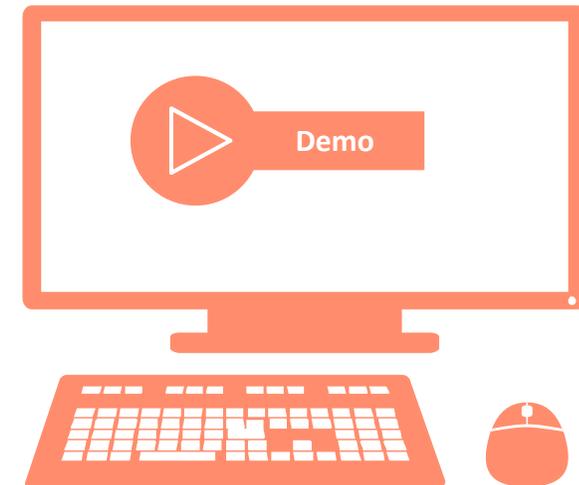
Total Financial Unit	All Financial Unit		150000A: Chief Financial Offi...
All Financial Unit	100000A: Office of the Presid...		151000B: Associate VP Budget ...
Global	150000A: Chief Financial Offi...		152000B: AVP-Financial Accoun...
	200000A: VP - Office of the N...		153000B: Chief Financial Offi...
	250000A: Provost & Exec VP-Ac...		154000B: Systemwide Procureme...
	300000A: Chief Operating Offi...		155000B: Capital Asset Strate...
	350000A: External Relations a...		156000B: Chief Risk Officer
	400000A: Exec VP UC Health		
	500000A: Sr VP Compliance and...		

Let us see a live PBS demonstration!

Review and Allocate in Decision Package Approval

Duration: 10 minutes

Description: This demonstration shows how to review the Decision Package request and Change Allocation for the Budget Requested.



Let us practice how to review and allocate DP Request in PBS.

Review for Decision Package Request

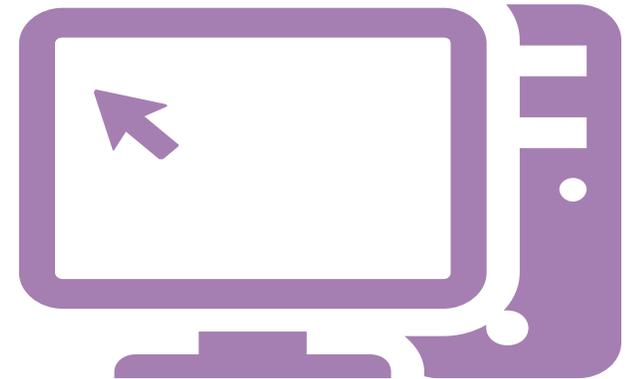
Duration: 15 minutes

Complete the following exercise in the training environment:

As a Decision Package Reviewer, user wants to review a Decision Package request raised by a requestor and change allocation the required budget across minimum two different funds.

Refer to your Exercise Guide for instructions and data.

- Apply the steps to search and review results.
- Apply the steps to access online help.



Key Takeaways

Let us wrap-up by discussing the key messages from this lesson.

- 1 With the introduction of PBS, all Decision Package Request should be approved and allocated by reviewer to have the changes reflect for requestor.
- 2 Reviewers will have visibility to change allocation for a specific combination as allocated by the requestor.
- 3 Reviewers can review Decision Package by Request type also.

Decision Package Review

Duration: 35 minutes

Lesson: 1 2

Lesson Objectives

Upon completing this lesson, you will be able to:

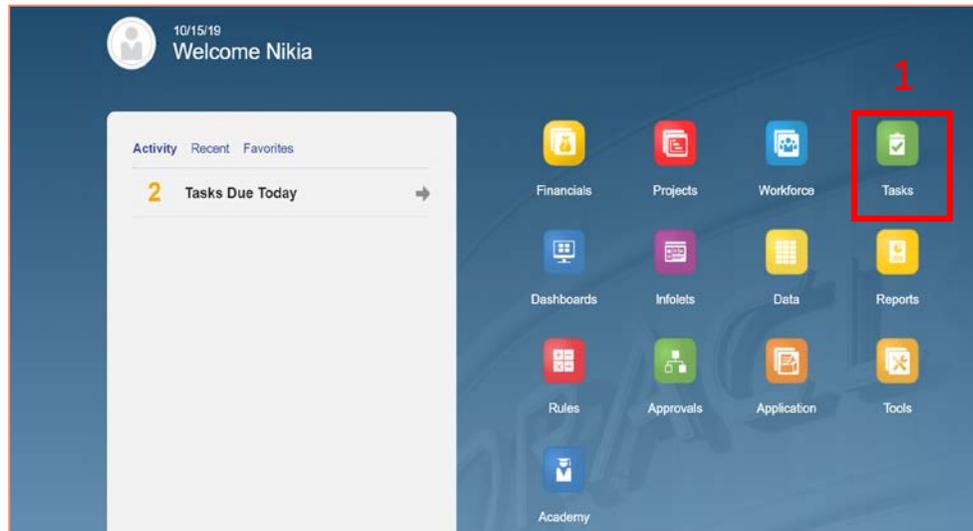
- Review the Summary of the Decision Package
- Approve/Reject the Decision Package request

Decision Package Approver

Decision Package Review Summary:

Navigation: This task is to approve request. Request can not be modified once approved.

1. Access Tasks tile from the home screen. The Tasks List page will be displayed.
2. In the task list select Decision Package Approver to expand the task.
3. Select the Decision Package Review Summary task to view summary details.



Decision Package Approver	2	●	i	...
Approval Form		●	i	...
Budget Impact - Decision Package		●	i	...
Decision Package Review by Request Type		●	i	...
Decision Package Summary	3	●	i	...

Decision Package Approver



Decision Package Summary:

Review the Decision Package Summary form to see details related to additional budget request. This form is read only.

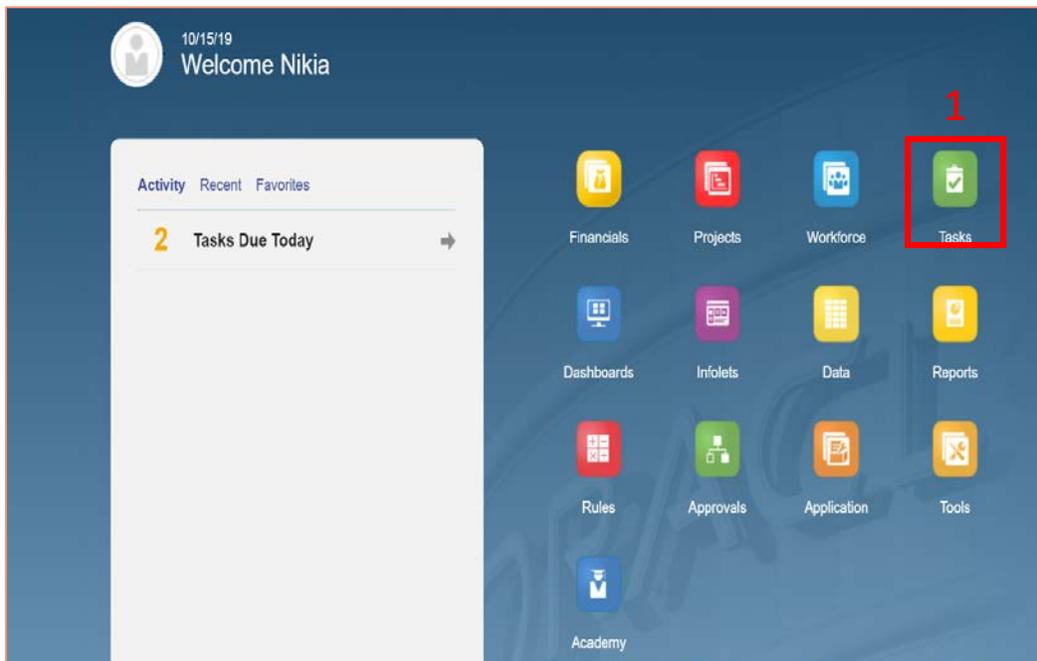
Decision Package Summary Save Refresh Actions <input type="checkbox"/> Complete Previous Next Close 												
Years	Scenario										Data Ad hoc Format	
FY20-21	Perm Budget	Assumptions			Assumptions	Assumptions	Assumptions	Assumptions	Assumptions	YearTotal	YearTotal	YearTotal
		Description	Strategic Priorities Funds	Duration	Priority Number	Attachment	Approval Status	Rank	FTE Required	Budget Required	Budget Approved	
Program Related	Request 1	3011050:Ucpath Ctr:Production	Expense on Program	Yes	One time only	Priority 1 - Approved Decision Memo		Approved		7	30,000	30,000
Contract	Request 1	3011050:Ucpath Ctr:Production	Contract related expenditures	Yes	One time only	Priority 3 - New Request, Highest Priority		Approved	2		40,000	36,000
Ongoing Expense	Request 1	3011050:Ucpath Ctr:Production	Ongoing Expenditures	Yes	One time only	Priority 3 - New Request, Highest Priority			1		20,000	

Decision Package Approver

Approve Request:

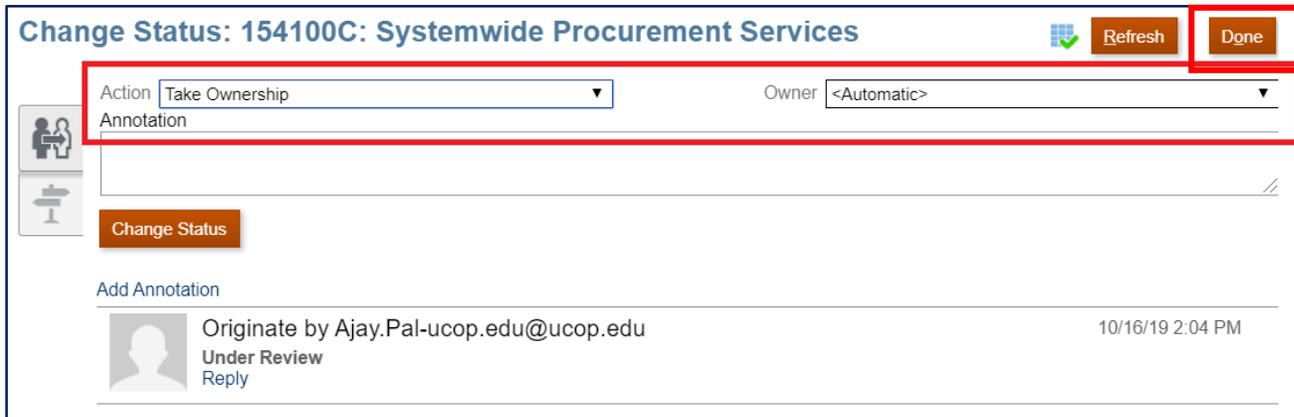
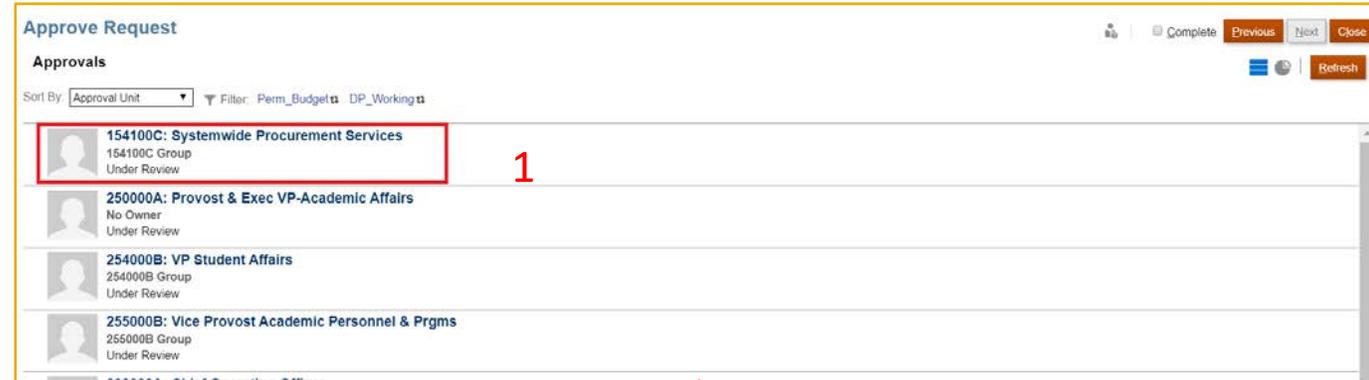
Navigation: This task is to approve request. Request can not be modified once approved.

1. Access Tasks tile from the home screen. The Tasks List page will be displayed.
2. In the task list select Decision Package Approver to expand the task.
3. Select the Approve Request task to began the approval process.



Navigation: Approve Request:

1. To approve a request, select the Unit for which the request needs to be approved.
2. Change the status of the request by selecting appropriate action and ownership.
3. Once the status has been changed select Done.

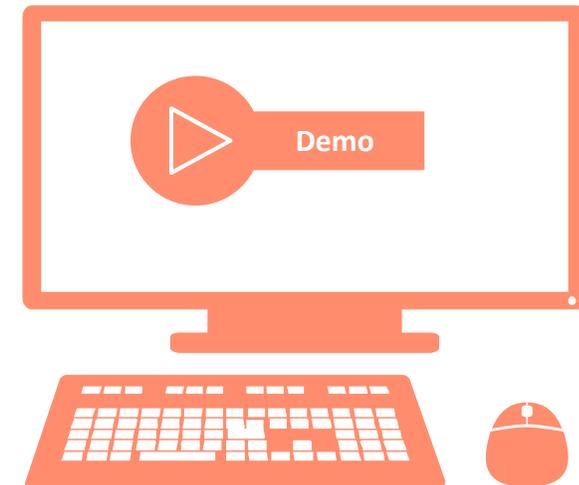


Let us see a live PBS demonstration!

Review and Approve/Reject a Decision Package Request

Duration: 10 minutes

Description: This demonstration shows how to review the summary of the Decision Package and approve/request the request.



Let us practice how to approve/reject a DP Request in PBS.

Review for Decision Package summary and approval/rejection of request

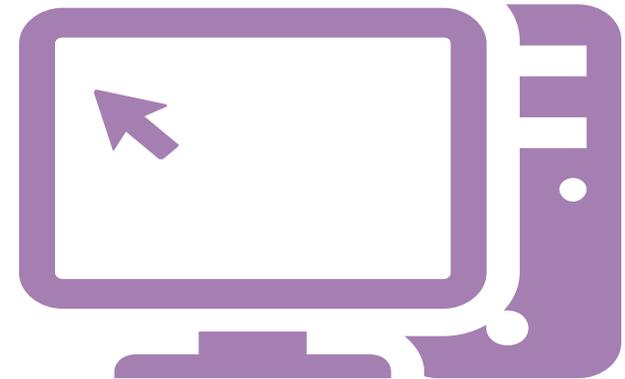
Duration: 15 minutes

Complete the following exercise in the training environment:

As a Decision Package Reviewer, user wants to review a Decision Package summary and then approve/reject the request

Refer to your Exercise Guide for instructions and data.

- Apply the steps to search and review results.
- Apply the steps to access online help.



Key Takeaways

Let us wrap-up by discussing the key messages from this lesson.

1 With the introduction of PBS, user can review the summary of Decision Package.

2 Reviewers can approve/reject the Decision Package Request.

Course Key Messages

Let us wrap-up by discussing the key messages from this course.

1 With the introduction of PBS, reviewers have the ability to review Decision Package Requests.

2 The Decision Package Approval module allows reviewers to approve/reject the requests.

3 The Decision Package Approval module allows reviewers to allocate budget across different funds and accounts.

Any Questions?

Do you have any questions?



Contact Us: In case of questions, please reach out to Nicole Terrell, Nicole.Terrell@ucop.edu



Reference Materials: All learning materials for this course are stored at <https://www.ucop.edu/fsr>



Thank you!



Deloitte.