



UCOP Planning and Budgeting System (PBS)

DPR100: Decision
Package Request

Current as of March 2020



Course Agenda

Here is the agenda for today's session.

| Lesson | Covered Topics / Processes |
|-----------------------|---|
| Request Form | <ul style="list-style-type: none">Requesting for Budget Allocation |
| Submit Request | <ul style="list-style-type: none">Submit the request for approvalReview the status of submitted request. |



Delivery Type:

ILT



Prerequisites:

BUDEXP100



Duration

1 hour 50 minutes

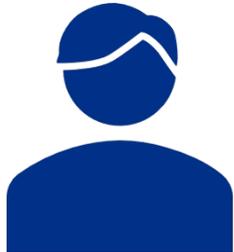
Upon completing this course, you will be able to:

- Explain the key changes in the Decision Package Request process
- List the components of the Decision Package Request module in PBS
- Set up Point of View for the Decision Package Request module in PBS
- Manage submission of the Decision Package Requests
- Create/Delete/Modify a Decision Package Request
- Allocate the required Budget across different funds

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

| Decision Package Request (DP Request) | A Request created by Decision Package Requestor. |
|--|---|
| Request Type | The type of request selected by requestor from the hierarchy. |
| Priority | Priority of the request selected by requestor. |
| Allocation | Refers to the process of split funding the budget for decision package requests from different funds and/or accounts. |

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



John Doe
Planner

Responsibilities:

- Manage creation of new Decision Package Requests
- Manage allocation for the Budget required for Decision Package requestor
- Manage submission of request created by the Decision Package requestor
- Write comprehensive description of Decision Package request to help reviewers make informed decisions

User will now be able to use PBS to:

- Create/Delete a Decision Package Request
- Allocate the Budget Required across different funds and/or Accounts
- Rank the Decision Packages in order of importance
- Submit the Decision Package request for approval

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

1. Request Form

- a) Create a new request and identify priority
- b) Add allocation to newly created request
- c) Rank request in order of importance (optional)
- d) Write complete descriptions of the request which will help reviewers make informed decisions when reviewing/approving request.
- e) Modify a request
- f) Delete a request

2. Submit request

- a) Attach support for Priority 1 and 2
- b) Submit the request for approval
- c) Review the status of the request

Components of Decision Package Request Module in PBS (Cont'd)

The following table lists the key points about each component of the Decision Package Request

| Components | Key Points |
|--|---|
|  POV Setup | Planners choose dimensions to create their Point of View (POV) while conducting Planning activities. |
|  Unit Assignment | Planners will begin in the Unit they are assigned to, but can be assigned to the unit that will be reviewing for. |
|  Creation and allocation of requests | Planner will start with creation of new requests and adding allocation for the budget required across different funds and accounts combination. |
|  Deletion of Request | Planners can also delete the requests if needed. |
|  Submit Request | Planners will submit the request for approval through approval hierarchy. |
|  Check Status of submitted request | Planners can check the status of the submitted request in separate form. |

Request Form

Duration: 50 minutes

Lesson: **1** 2

Upon completing this lesson, you will be able to:

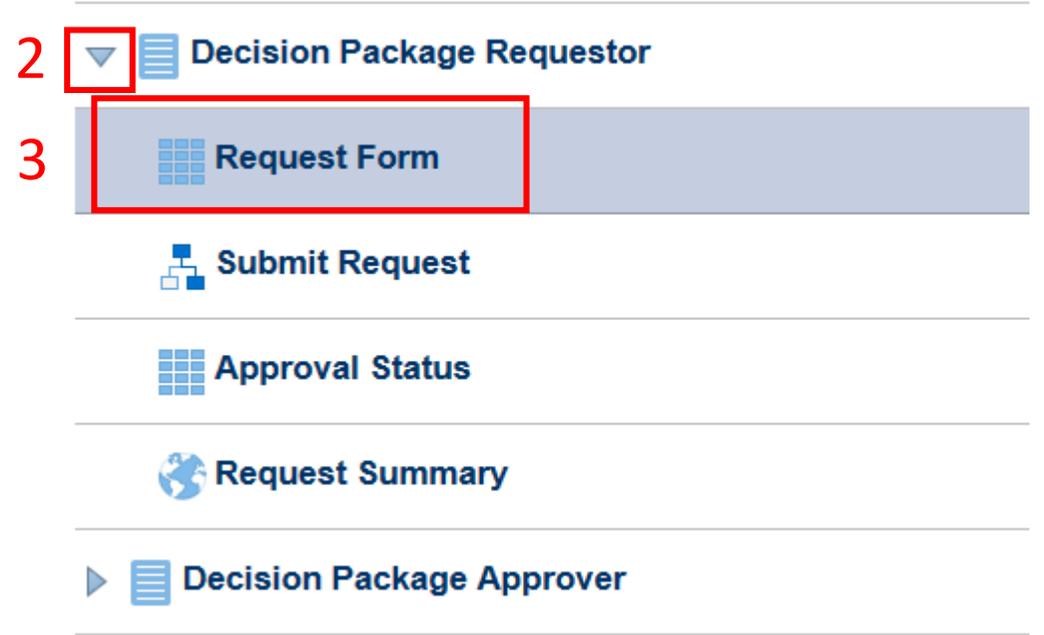
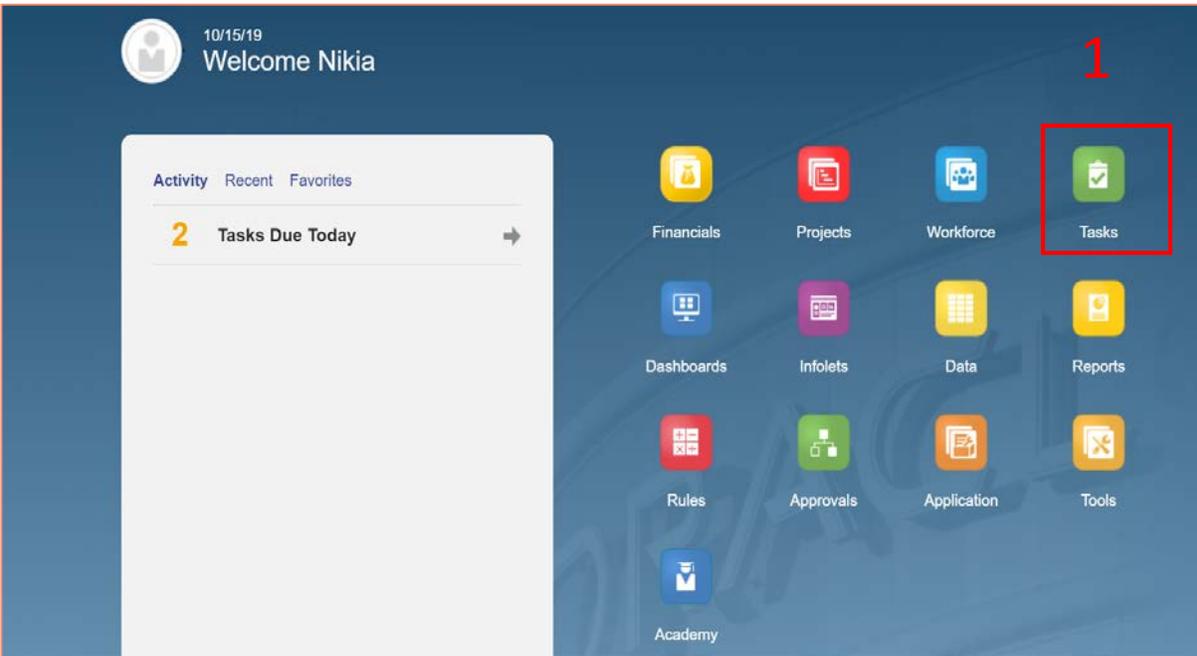
- Create a new Request using DP Request Module
- Add allocation to a newly added request
- Modify a request if needed
- Delete a request if needed

Decision Package Request

Decision Package Request – The Decision Package Request task allow users to submit additional budget request on the behalf of Financial Units for the budget planning year.

Navigation:

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



Decision Package Request

Navigation: Request Form

1. Once the Request Form is displayed, select the Unit that is responsible for the request
2. The option to enter or select the unit will be displayed in a different window
3. Select Ok, once the selection has been made.

Request Form

Years: FY20-21 | Scenario: Perm Budge | Unit: 3029010:UCOP Local Human Resources Ofc

| Assumptions | Assumptions | Assumptions | Assumptions | Assumptions | Assumptions | Assumptions | YearTotal |
|----------------|----------------------------|--------------|-----------------|---------------|--|-----------------|-----------|
| Description | Strategic Priorities Funds | Duration | Priority Number | Rank | Attachment | Budget Required | |
| Personnel Cost | Request 1 | SmokeTest_PC | Yes | One time only | Priority 3 - New Request, Highest Priority | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

Select a Member

Unit: "3029010:UCOP Local Human Resources Ofc"

3029010

| Total Financial Units | Total Financial Unit | All Financial Unit |
|-----------------------|----------------------|----------------------------------|
| Total Financial Unit | All Financial Unit | 100000A: Office of the Presid... |
| | Global | 150000A: Chief Financial Offi... |
| | | 200000A: VP - Office of the N... |
| | | 250000A: Provost & Exec VP-Ac... |
| | | 300000A: Chief Operating Offi... |
| | | 350000A: External Relations a... |
| | | 400000A: Exec VP UC Health |
| | | 500000A: Sr VP Compliance and... |
| | | 510000A: Ofc. of General Counsel |

Navigation: Request Form

1. Select Actions upon returning to the Request Form after selecting the unit
2. Select Add Request from the Action options

Request Form

Save Refresh **Actions** Complete Previous Next Close

Years: FY20-21 Scenario: Perm Budget Unit: 3029010:UCOP Local Human Resources Ofc

| | | Assumptions | Assumptions | Assumptions | Assumptions | Assumptions | Assumptions | YearTotal |
|----------------|-----------|--------------|----------------------------|---------------|--|-------------|-------------|-----------------|
| | | Description | Strategic Priorities Funds | Duration | Priority Number | Rank | Attachment | Budget Required |
| Personnel Cost | Request 1 | SmokeTest_PC | Yes | One time only | Priority 3 - New Request, Highest Priority | | | |



Request Form

Save Refresh **Actions** Complete Previous Next Close

Years: FY20-21 Scenario: Perm Budget Unit: Total Financial Unit Account

| Description | Strategic Priorities Funds | Duration | Priority Number |
|-------------|----------------------------|----------|-----------------|
|-------------|----------------------------|----------|-----------------|

- Add Request**
- Filter
- Analyze
- New Ad Hoc Grid
- Predictive Planning
- Business Rules
- Smart Push Details
- Grid Validation Messages
- Clear Formatting
- Spreadsheet Export
- Open in Smart View

Decision Package Request

Navigation: Request Form

1. Once the option to add a request is chosen, enter or Select the Requester Type from the hierarchy
2. Click Ok

UCOP_DP_AddRequest Launch Cancel

1 * Please enter the Request Type

* Please select priority

* Please enter strategic priority fund

* Please enter duration

* What is the need

* Justify the budget requirement

* Please enter description

Select a Member OK Cancel

Function "Central and Administrative" 2

Search Function

| Total Function | Request Type |
|----------------|---|
| Request Type | Program Related |
| | <input checked="" type="checkbox"/> Central and Administrative |
| | Contract |
| | Personnel Cost |
| | Ongoing Expense |
| | Trade - off/ Reductions |

Decision Package Request

Navigation: Request Form

1. After selecting the request type, select the Priority from the drop down menu
2. Next, select the duration from the drop down menu.

UCOP_DP_AddRequest

* Please enter the Request Type

* Please select priority **Priority 1 - Approved Decision Memo** (highlighted in red)

* Please enter strategic priority fund

* Please enter duration

* What is the need

* Justify the budget requirement

1 * Please enter description

Launch Cancel

Note - All the request with "Priority 1 - Approved Decision Memo" and "Priority 2 - Approved MPI" will be automatically approved.

UCOP_DP_AddRequest

* Please enter the Request Type

* Please select priority

* Please enter strategic priority fund

* Please enter duration **One time only** (highlighted in red)

* What is the need

* Justify the budget requirement

* Please enter description

Launch Cancel

1x Only – Only for the current fiscal year being budgeted
Permanent – Multi-year funding or permanent

Decision Package Request

Navigation: Request Form

1. Next, select the “NO” option for Strategic Priority Fund
2. Enter a description for the request once the priority fund option is complete
3. Select Launch to generate request

UCOP_DP_AddRequest

* Please enter the Request Type: "Personnel Cost"

* Please select priority: Priority 1 - Approved Decision Memo

1 * Please enter strategic priority fund: No

* Please enter duration: One time only

* What is the need: New Project

* Justify the budget requirement: Test 1

2 * Please enter description: [Empty]

3 [Launch] [Cancel]

UCOP_DP_AddRequest

* Please enter the Request Type: "Personnel Cost"

* Please select priority: Priority 1 - Approved Decision Memo

* Please enter strategic priority fund: No

* Please enter duration: No

Decision Package Request

Navigation: Request Form

1. Once the request form is displayed after launching, enter the Requested Budget Amount

Request Form

Save Refresh Actions Complete Previous Next Close

| Years | Scenario | Assumptions | | | | Assumptions | Assumptions | YearTotal | | | |
|----------------------------|-------------|--------------|----------------------------|----------|-------------------------------------|-------------|-------------|-----------------|--|--|--|
| FY20-21 | Perm Budget | Description | Strategic Priorities Funds | Duration | Priority Number | Rank | Attachment | Budget Required | | | |
| Central and Administrative | Request 1 | Request Memo | 1 | 1 | Priority 1 - Approved Decision Memo | 2 | | 1,000 | | | |
| Trade - off/ Reductions | Request 1 | test | 1 | 1 | Priority 1 - Approved Decision Memo | | 3 | | | | |

Budget Request is defined as the net impact of uses less sources.

- 2. Add ranking
- 3. Add attachment
- 4. Next Select Save

Attachments

Browse... No file selected.

Upload Close

- Add Request
- Edit
- Adjust
- Comments
- Supporting Detail
- Change History
- Attachments

Decision Package Request – Adding Allocation

Navigation: Request Form

1. From the request form select the request you want to add allocation and go to actions drop down menu. Also, can be done with a right click on request
2. Select Allocation Form from the Action options.

| Years | Scenario | Unit | Assumptions | | | | YearTotal | | |
|---------|-------------|--|--------------|----------------------------|---------------|--|-----------|------------|-----------------|
| | | | Description | Strategic Priorities Funds | Duration | Priority Number | Rank | Attachment | Budget Required |
| FY20-21 | Perm Budget | 3029010:UCOP Local Human Resources Ofc | SmokeTest_PC | Yes | One time only | Priority 3 - New Request, Highest Priority | | | |

| Contract | Request 1 | Priorities Funds | Duration | Priority Number | Rank | Attachment | Budget Required |
|----------|-----------|------------------|---------------|--|------|------------|-----------------|
| | | | One time only | Priority 3 - New Request, Highest Priority | | | |

Decision Package Request – Adding Allocation

Navigation: Request Form

1. To add allocation in the appropriate revenue account for each Fund if known or Fund Group.
2. Then save the data, and move on to expenses

Request Form ⓘ 🔍 👤 **Save** Refresh Actions ▾ Complete Previous

1.0 UCOP - Request Form > 1.1 UCOP - Allocation Form

| Years | Fund | Unit | Function | Plan Element | | | Data | Ad |
|--|--|--------------------------|----------------|--------------|--------------|--|---------------------|--|
| FY20-21 | 19963: Systemwide UC Path State General Fund | 1020000: TITLE IX OFFICE | Personnel Cost | Request 1 | | | | |
| | | No Fund | Restricted | Designated | Unrestricted | 19963: Systemwide UC Path State General Fund | Total Fund - Regent | 19963: Systemwide UC Path State General Fund |
| What is the need | New Project | | | | | | | |
| Justification | Test 1 | | | | | | | |
| Description | Test description | | | | | | | |
| Priority Number | Priority 1 - Approved Decision Memo | | | | | | | |
| Strategic Priorities Funds | No | | | | | | | |
| Duration | One time only | | | | | | | |
| Budget Required | | 500,000 | | | | (500,000) | (500,000) | (500,000) |
| Revenues | | | | | | 500,000 | 500,000 | 500,000 |
| 40000A: Student Tuition & Fees Input | | | | | | | | |
| 40500A: Contracts and Grants (non-Capital) Input | | | | | | | | |
| 41000A: Sales and Services -Educational Input | | | | | | | | |

2

1

If these cells are highlighted in **RED** the DP allocation is out of balance from the Budget Required

Decision Package Request – Adding Allocation

Navigation: Request Form

1. To add expenses enter the data across various funds
2. Then save the data and browse back to original form.

Request Form 2

Save Refresh Actions

1.0 UCOP - Request Form > 1.1 UCOP - Allocation Form

| Years | Fund | Unit | Function | Plan Element | | | |
|--|---|-------------------------|----------------|--------------|--------------|---|---------------------|
| FY20-21 | 19963:Systemwide UC Path State General Fund | 1020000:TITLE IX OFFICE | Personnel Cost | Request 1 | | | 1 |
| | | No Fund | Restricted | Designated | Unrestricted | 19963:Systemwide UC Path State General Fund | Total Fund - Regent |
| 87000A:Other Changes in Net Position (For Fin Rptng) Input | | | | | | | |
| ----- | | | | | | | |
| Expenses | | | | | | | |
| Salaries Input | | | | | | | |
| Benefits Input | | | | | | | |
| FTE Required | | | | | | | |
| Other Office Misc Input | | | | | | | |

Decision Package Request - Deleting

Navigation: Request Form

1. To delete a request from the Request form, right click on the Request type
2. Then select Delete Request
3. Next Save the changes

The screenshot shows the 'Request Form' interface. On the left, a context menu is open with 'Delete Request' highlighted (marked with a red '2'). The 'Save' button in the top right toolbar is also highlighted (marked with a red '3'). In the table below, the first row is highlighted in blue (marked with a red '1').

| Assumptions | Assumptions | Assumptions | Assumptions | Assumptions | Assumptions | YearTotal |
|----------------------------|-------------|-----------------|--|-------------|-----------------|-----------|
| Strategic Priorities Funds | Duration | Priority Number | Rank | Attachment | Budget Required | |
| Program | Yes | One time only | Priority 1 - Approved Decision Memo | | | 30,000 |
| expenditures | Yes | One time only | Priority 3 - New Request, Highest Priority | 2 | | 40,000 |
| itures | Yes | One time only | Priority 3 - New Request, Highest Priority | 1 | | 20,000 |

4. **ALWAYS** click save after action request that changes data.

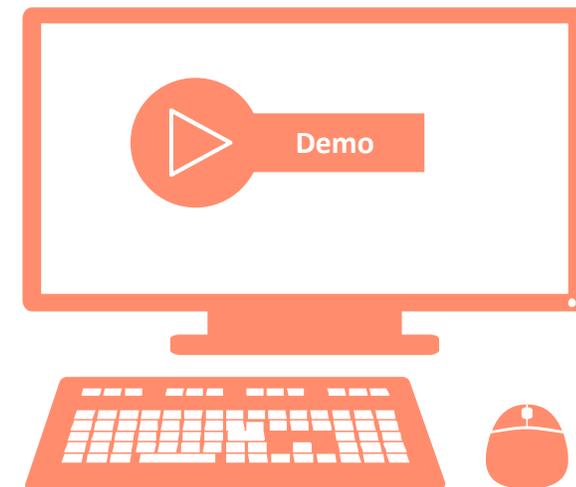
Note – Request can only be deleted if the Budget Required and Allocation Fields are cleared

Let us see a live PBS demonstration!

Create and Allocate in Decision Package Request

Duration: 10 minutes

Description: This demonstration shows how to create a new Decision Package request and Add Allocation for the Budget Required.



Let us practice how to create a new request in PBS.

Create a New Decision Package Request

Duration: 15 minutes

Complete the following exercise in the training environment:

As a Decision Package Requestor, user wants to create a Decision Package request and allocate 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.



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

1 With the introduction of PBS, all Decision Package Request will be submitted through this process only.

2 Decision Package Requestors will have visibility to allocate the required budget across different funds.

3 Decision Package Requestors will now be able to create and delete new requests.

Submit Request

Duration: 35 minutes

Lesson: 1 2

Lesson Objectives

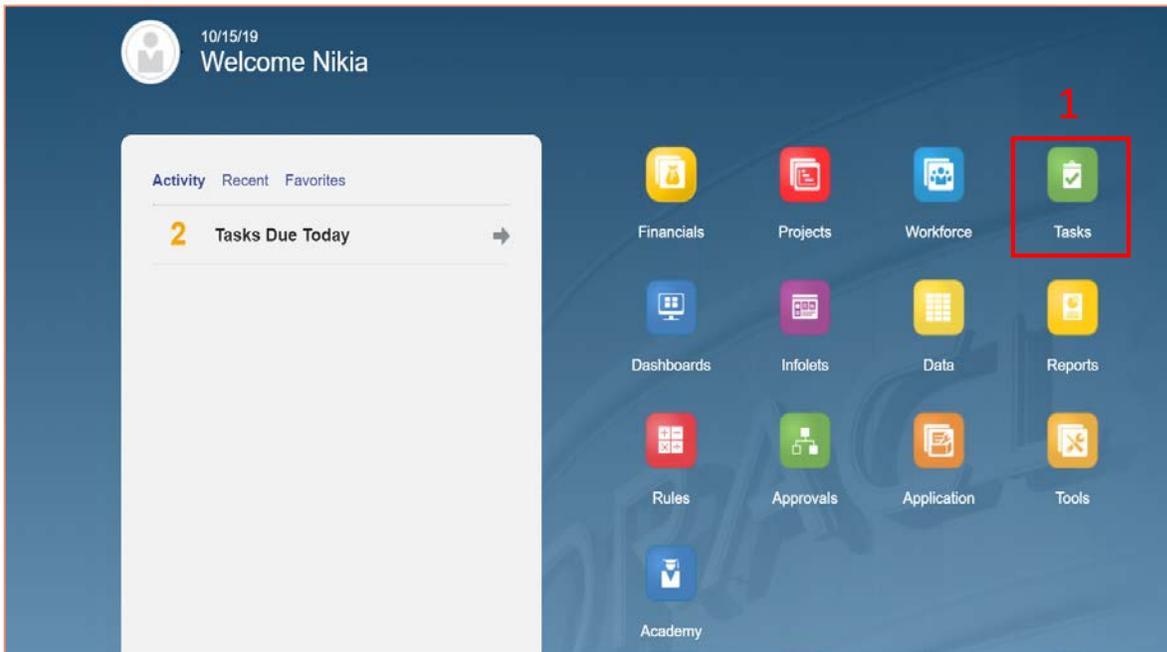
Upon completing this lesson, you will be able to:

- Submit Decision Package request for Approval Process
- Review the status of Submitted requests

Decision Package Request

Navigation: Submit Request

1. Access Tasks tile from the home screen
2. In the task list select Decision Package Requester to expand the task.
3. Select Submit Request to begin the submittal process



| Name | Status | Start | End | Instructions | Action |
|-------------------------------------|--------|---------|---------|--------------|--------|
| ▼ Planner | ● | | | ? | ... |
| ▶ Forecast | ● | | | ? | ... |
| ▶ Budget | ● | | | ? | ... |
| Budget Summary | ● | 11/1/19 | 5/28/20 | ? | ... |
| ▶ Reviewer | ● | | | ? | ... |
| ▶ WF_DataLoad | ● | | | ? | ... |
| ▼ Decision Package Requester | ● | | | ? | ... |
| Request Form | ● | | | ? | ... |
| Submit Request | ● | | | ? | ... |

Decision Package Request

Navigation: Submit Request

1. Select the Unit that is submitting the request
2. Change the status of the request by selecting PROMOTE
3. Next, select “Change Status”
4. Then select Done

Note -Once Budget get submitted, the data will become non editable for the Requestor

Submit Request

Approvals

Sort By: Approval Unit Filter: Perm_Budget DP_Working

| | | |
|--|--|---|
| | 154100C: Systemwide Procurement Services 154100C Group Under Review | 1 |
| | 250000A: Provost & Exec VP-Academic Affairs No Owner Under Review | |
| | 254000B: VP Student Affairs 254000B Group Under Review | |
| | 255000B: Vice Provost Academic Personnel & Prgms 255000B Group Under Review | |
| | 300000A: Chief Operating Officer No Owner Under Review | |

Change Status: 102000C:TITLE IX OFFICE

Change Status: 102000C:TITLE IX OFFICE

Action Promote Owner <Automatic>

Annotation

Change Status 3

Change Status: 102000C:TITLE IX OFFICE

Change Status: 102000C:TITLE IX OFFICE

Refresh Done 4

Action Promote Owner <Automatic>

Annotation

Change Status

Add Annotation

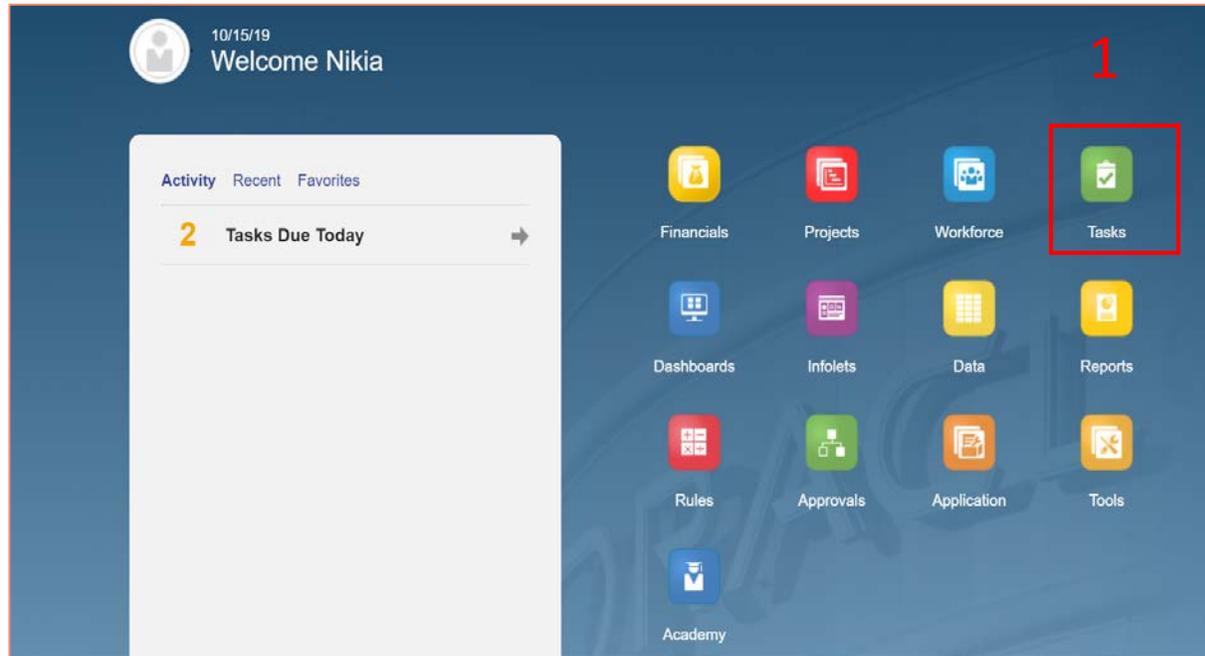
| | | |
|--|---|-------------------|
| | Promote by Craig Kitaoka Under Review Reply | 1/18/20 4:33 PM |
| | Originate by Satya Bokam Under Review Reply | 12/16/19 10:43 PM |

Decision Package Request

Approval Status – This task allows user to review the status of their submitted requests.

Navigation:

1. Access the Tasks tile from the home screen. The Tasks List page will be displayed.
2. In the task list select Decision Package Requester to expand the task.
3. Select the Approval Status task to begin the process.



Tasks: All Task Lists

Filter: All

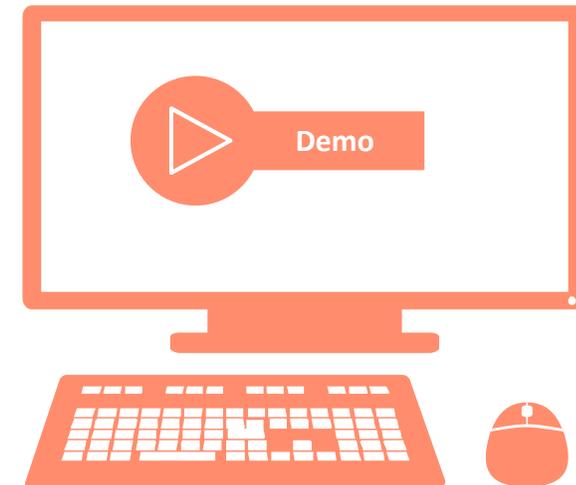
| Name | Status | Start | End | Instructions | Action |
|------------------------------|--------|-------|-----|--------------|--------|
| ▶ Admin User | ● | | | ⓘ | ⋮ |
| ▶ Planner | ● | | | ⓘ | ⋮ |
| ▶ Reviewer | ● | | | ⓘ | ⋮ |
| ▶ WF_DataLoad | ● | | | ⓘ | ⋮ |
| ▼ Decision Package Requester | ● | | | ⓘ | ⋮ |
| Request Form | ● | | | ⓘ | ⋮ |
| Submit Request | ● | | | ⓘ | ⋮ |
| Approval Status | ● | | | ⓘ | ⋮ |

Let us see a live PBS demonstration!

Submit and Review Status of a Decision Package Request

Duration: 10 minutes

Description: This demonstration shows how to submit a Decision Package Request and review it's current status.



Let us practice how to submit and review a DP request in PBS.

Submission and Review for Decision Package Request

Duration: 15 minutes

Complete the following exercise in the training environment:

As a Decision Package Requestor, user wants to submit a Decision Package request and then review the status of 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 submit the DP Requests for approval process.

2 Users can check the current status for their submitted requests.

Course Key Messages

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

1

With the introduction of PBS, requestors have ability to create/delete a new request.

2

The Decision Package Request module allows users to submit the requests for approval process.

3

The Decision Package Request module allows users to allocate required budget across different funds and accounts combination.

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.