Budget Planning

In TEAMS, budget planning is done via budget planning worksheets that are part of the program.

Entering Worksheet Information

- On the TEAMS home page, click in the SEARCH Box and enter the following:
  allocate budget
- What you should see highlighted is the link "Allocate Budget Owner Allocations."
- Click on this link
- Be sure the correct Budget Year is selected. The Budget Year you will use is the one for which you're planning your budget.
- Once you get to this page, press the <SEARCH> button on the screen. All allocations for which you are shown as a Budget Manager should appear beneath the blue line titled "Budget Owner Allocations."
- Highlight the worksheet you wish to complete and then press the <EDIT> button. Doing this will open the worksheet and will show all budget codes out there for that particular budget owner/worksheet.

If your allocation is a flat or variable one (which most are) the total amount you have to allocate is shown at the top of the screen and about 1/3 of the way down the screen. As you plan your budget the amount the balance remaining to plan is shown in the "Remainder Allocation Amount" area on the screen.

- To enter the budget information, find the line to which you want to add a budget.
- Click in the cell on that line under the "Allocate Amt" column
- Enter the amount (Whole Dollars Only).
- To go to the next line you can click in that cell or you can press the down arrow key
- Continue doing this until your allocation has been exhausted.

For all flat and variable allocations, you cannot plan more than the total shown. If additional funds are needed, you must complete the "Request for Change in Budgdget" form on the Budget Department website. It can be found under > > Forms Budget Planning.

- Be sure to SAVE your worksheet so you don't lose your changes. To save the worksheet you press the "SAVE ALLOCATE" button on the bottom of the screen.

- To print a copy of the worksheet, you can press the "PRINT WORKSHEET" button. You will then have to decide if you want this worksheet to print to Excel or to Adobe.

Please be sure you will NOT have any changes prior to performing the next step as there is no way to "un-do" without Denying the worksheet.

- Once you have the worksheet completed the way you want, you must submit it for approval. To do this press the "SUBMIT FOR APPROVAL" button on the bottom of the worksheet.

- To exit this worksheet, press the "EXIT WORKSHEET" button on the bottom of the worksheet.

Approving/Denying Worksheet

All budget managers are also budget worksheet approvers. To approve the worksheet you have entered and get it through the workflow go to the TEAMS home page.

- In the Search Box type:
    - Approve budget

- What you should see highlighted is "Approve Budget Owner Allocations"

- Click on that link

Approval screen is now shown.

- Be sure the correct Budget Year is shown.

- Click on the SEARCH button.

- All items awaiting your approval should be shown.

- Click on the line you want to approve.

- Press the EDIT button. This takes you in to the allocation that needs your approval.

Approvers CANNOT make changes on the worksheets. If there is something that the approver does not want to approve, the approver must DENY the worksheet and the entire planning process must be re-started.

- To approve, click the APPROVE button.

- To Deny, select the denial reason and click the DENY button.

If you DENY, that worksheet is dead and will not go any further. The allocation will not be budgeted at all if left like that. HOWEVER, it can be brought back to life. ☺

If you have denied a worksheet, please send an e-mail to Carrie Simpson so the worksheet can be started over.