



# SECURITY & WORKFLOW

## 1. Workflow Overview

# SUBMITTING THE PLAN

**Approvals**

Sort By:  Filter: Budget Working

|   |  |
|---|--|
|  | <b>D_8101</b><br>Planner<br>Under Review   No Additional Approval Required |
|  | <b>D_8560</b><br>acaddirtest<br>Under Review                               |
|  | <b>D_8565</b><br>acaddirtest<br>Under Review                               |
|  | <b>D_8570</b><br>acaddirtest<br>Under Review                               |

- The Approvals screen is displayed. It will show all departments you are responsible for directly or if you are a division manager all the department budgets that you will need to submit.
- Click on any department to submit that budget.

# SUBMITTING THE PLAN

Change Status: D\_8560



Refresh

Done

Action  Owner

Annotation

Add Annotation

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 Originate by dcory  
Under Review  
Reply

12/5/18 11:28 AM

- When a Department is selected on the Approvals screen the status dialogue screen is displayed.
- Click on the Action box and select “Promote” to submit the budget.
- Add Annotations with the submission if desired. This is not required.
- Click the Change Status Button to submit, and Done to close this screen.
- Division budgets are submitted to Finance the same way that Department Managers submit budgets to Division Managers.
  - NOTE: If the difference between the allocation and submitted costs is negative, none of the departments in that division will be able to submit their budgets once this value becomes negative.
  - NOTE: The budget will be locked for a user once it is submitted. Users will be able to view, but not edit their budgets.