



# STRATEGIC REQUESTS

# STRATEGIC REQUESTS OVERVIEW



The screenshot shows the TCNJ Planning and Budgeting Cloud interface. At the top, it displays the TCNJ logo and the text 'TCNJ THE COLLEGE OF NEW JERSEY Planning and Budgeting Cloud: TCNJ\_Pin'. The user is identified as 'testuser1'. A welcome message '11/18/19 Welcome Test' is visible. On the left, there is a sidebar with 'Activity', 'Recent', and 'Favorites' tabs. The main area contains several cards: 'Employee Planning', 'Budget Overview', 'Multi-Year Budgeting', 'Forecasting', 'Supplemental Budget Req', 'Reports', 'Application', and 'Tools'. The 'Strategic Request Input' card is highlighted with a blue border.

Strategic Requests that align with TCNJ's Strategic Initiatives will now be made directly via PBCS for approval. Upon approval, the request will become an official Strategic Program to be funded by the Strategic Initiatives Fund.

To access Strategic Requests: Select the **Strategic Request Input** Card

# STRATEGIC REQUEST INPUT FORMS



	Strategic Request Initiative Selection
	Strategic Request Input
	Strategic Request Review (Next Year, Next Year 1 & Next Year 2)

# STRATEGIC REQUEST INITIATIVE SELECTION FORM



TCNJ THE COLLEGE OF NEW JERSEY Planning and Budgeting Cloud: TCNJ\_Pln

Employee Planning Budget Overview Multi-Year Budgeting **Strategic Request Input** Forecasting Supplemental Budget Req Reports

**Strategic Request Initiative Selection - Planners**

Years	Scenario Budget	Version Working	LEntity The College of New Jersey	0000 - Default Organization	0000 - Default Organization	0000 - Default Organization				
				Strategic Initiative	Area Owner			Strategic Request Approval Status		
Strategic Request 1	Student Success: Improve Retention of Faculty, Staff & Students			Housing			Not Approved			
Strategic Request 2	Student Success: Support Holistic Health & Wellness			School of Humanities & Social Science			Approved			
Strategic Request 3	Student Success: Improve Retention of Faculty, Staff & Students			Office of Information Technology & Campus Safety						
Strategic Request 4	Student Success: Inclusiveness and Diversity			Office of Enrollment Management						
Strategic Request 5	Student Success: Improve Retention of Faculty, Staff & Students			Student Center						
Strategic Request 6										

The **Strategic Request Initiative Selection Form** is the starting point for Users to make selections via drop-down menu and begin inputting strategic request details.

Users will make selections in the first open/available Strategic Request Row and become the owner of that Strategic Request #.

# STRATEGIC REQUEST INITIATIVE SELECTION



	0000 - Default Organization	0000 - Default Organization	0000 - Default Organization		
	Strategic Initiative		Area Owner		Strategic Request Approval Status
Strategic Request 8					
Strategic Request 9					

The **Strategic Request Initiative Selection Drop-Down Menu** contains the Strategic Initiatives defined by The College of New Jersey as part of their 5-Year Plan.

Strategic Requests must be associated with a specific Strategic Initiative.

Entries
Search <input type="text"/>
Name
Financial Sustainability: Multi-Year Financial Plan to Support Institutional Priorities
Financial Sustainability: Planning for New Market Development
Financial Sustainability: Reallocate Resources to Address Strategic Priorities
National Reputation: College's Distinctive Identity
National Reputation: Communicating the College's Identity
National Reputation: Institutional & Programmatic Strategies
National Reputation: Strategic Partnerships
National Reputation: Sustainability Practices Into All Operations of the College
Student Success: Academic Equipment
Student Success: Advising/Mentoring to Close Graduation Gap

# STRATEGIC REQUEST AREA OWNER



	0000 - Default Organization	0000 - Default Organization	0000 - Default Organization		
	Strategic Initiative	Area Owner		Strategic Request Approval Status	
Strategic Request 8	Student Success: Inclusiveness and Diversity	<input type="text"/>			

Entries

Search

**Name**

- Office of Diversity, Equity & Inclusion
- Office of Enrollment Management
- Office of Facilities Management
- Office of General Counsel
- Office of Human Resources
- Office of Information Technology & Campus Safety
- Office of President
- Office of Student Affairs
- Office of Treasurer
- School of Arts & Communication

The **Strategic Request Area Owner Drop-Down Menu** contains a list of Level-2 and Level-3 Organizations for users to select the appropriate owner of the Strategic Request.

# STRATEGIC REQUEST APPROVAL STATUS



TCNJ THE COLLEGE OF NEW JERSEY Planning and Budgeting Cloud: TCNJ\_Pin

Employee Planning Budget Overview Multi-Year Budgeting **Strategic Request Input** Forecasting Supplemental Budget Req Reports

### Strategic Request Initiative Selection - Planners

Years	Scenario	Version	LEntity	0000 - Default Organization		0000 - Default Organization		0000 - Default Organization			
FY21	Budget	Working	The College of New Jersey	Strategic Initiative		Area Owner		Strategic Request Approval Status			
Strategic Request 1	Student Success: Improve Retention of Faculty, Staff & Students			Housing		Not Approved		Approved			
Strategic Request 2	Student Success: Support Holistic Health & Wellness			School of Humanities & Social Science							
Strategic Request 3	Student Success: Improve Retention of Faculty, Staff & Students			Office of Information Technology & Campus Safety							
Strategic Request 4	Student Success: Inclusiveness and Diversity			Office of Enrollment Management							
Strategic Request 5	Student Success: Improve Retention of Faculty, Staff & Students			Student Center							
Strategic Request 6											

Strategic Request Approval Status
Not Approved
Approved

The **Strategic Request Approval Status** will be updated by the Treasurer's Office as Strategic Requests are reviewed and Approved or Not Approved.

If the Strategic Request is **Approved**, it will become an official **Program** in the Chart of Accounts and in PBCS.

# STRATEGIC REQUEST DIRECT LINK TO INPUT



TCNJ THE COLLEGE OF NEW JERSEY Planning and Budgeting Cloud: TCNJ\_Pin

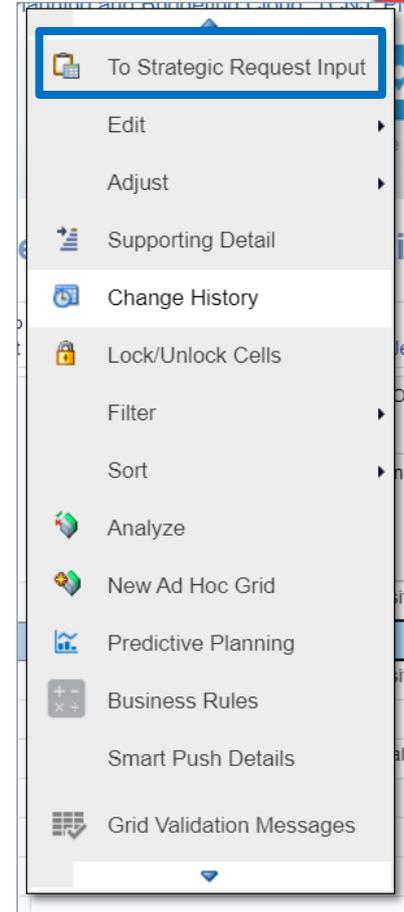
Employee Planning Budget Overview Multi-Year Budgeting **Strategic Request Input** Forecasting Supplemental Budget Req Reports

### Strategic Request Initiative Selection - Planners

Years	Scenario	Version	LEntity	0000 - Default Organization		0000 - Default Organization	0000 - Default Organization			
FY21	Budget	Working	The College of New Jersey	Strategic Initiative		Area Owner		Strategic Request Approval Status		
Strategic Request 1	Student Success: Improve Retention of Faculty, Staff & Students			Housing				Not Approved		
Strategic Request 2	Student Success: Support Holistic Health & Wellness			School of Humanities & Social Science				Approved		
Strategic Request 3	Student Success: Improve Retention of Faculty, Staff & Students			Office of Information Technology & Campus Safety						
Strategic Request 4	Student Success: Inclusiveness and Diversity			Office of Enrollment Management						
Strategic Request 5	Student Success: Improve Retention of Faculty, Staff & Students			Student Center						
Strategic Request 6										

Upon making Strategic Initiative Selection and Area Owner Selection, Users should move to the **Strategic Request Input Form**.

In order to move to the **Input Form**, Users should right-click on their Strategic Request and then select **“To Strategic Request Input”** from the top of the pop-up menu. Right-clicking is the preferred method because it will automatically put the correct Strategic Request in the POV.



# STRATEGIC REQUEST INPUT FORM



TCNJ THE COLLEGE OF NEW JERSEY Planning and Budgeting Cloud: TCNJ\_Pln

Employee Planning Budget Overview Multi-Year Budgeting **Strategic Request Input** Forecasting Supplemental Budget Req Reports

**Strategic Request Input**

Fund	Scenario	Version	PlanElement	LEntity	Program		
103020 - Strategic Initiatives Reserves	Budget	Working	Strategic Request Input	The College of New Jersey	Strategic Request 8		
		FY21	FY21	FY22	FY22	FY23	FY23
		YearTotal	Comments	YearTotal	Comments	YearTotal	Comments

**NEW Strategic Request Form with no data yet**

The **Strategic Request Input Form** will be the location for Users to input Revenues and Expenses associated with the Strategic Request.

**Strategic Request Input**

Fund	Scenario	Version	PlanElement	LEntity	Program		
103020 - Strategic Initiatives Reserves	Budget	Working	Strategic Request Input	The College of New Jersey	Strategic Request 1		
		FY21	FY21	FY22	FY22	FY23	FY23
		YearTotal	Comments	YearTotal	Comments	YearTotal	Comments
608000 - Advertising Expense	1700 - Dean of Nursing, Health & Exercise Science	100 - Instruction - General	15,000				
	1701 - Nursing	100 - Instruction - General	600				
<b>Advertising &amp; Recruitment</b>	1700 - Dean of Nursing, Health & Exercise Science	100 - Instruction - General	15,000				
	1701 - Nursing	100 - Instruction - General	600				
<b>Total General Operating Expenses</b>	1700 - Dean of Nursing, Health & Exercise Science	100 - Instruction - General	15,000				
	1701 - Nursing	100 - Instruction - General	600				
<b>Nonpersonnel Operating Expenses</b>	1700 - Dean of Nursing, Health & Exercise Science	100 - Instruction - General	15,000				
	1701 - Nursing	100 - Instruction - General	600				
<b>Total Expenses</b>	1700 - Dean of Nursing, Health & Exercise Science	100 - Instruction - General	15,000				
	1701 - Nursing	100 - Instruction - General	600				
<b>Surplus (Deficit)</b>	1700 - Dean of Nursing, Health & Exercise Science	100 - Instruction - General	-15,000				
	1701 - Nursing	100 - Instruction - General	-600				
Surplus (Deficit)	All Organizations	All Categories	-15,600				

**Strategic Request Input Form with data entered by a User**

This form can be accessed via Right-Click from the previous form and the Strategic Request # that was right-clicked on should match the Strategic Request # in the POV.

# STRATEGIC REQUEST INPUT **ADD ROW**



## Consol\_Add Row\_Strategic Requests

\* Select Accounts

\* RTP\_Category

\* Select Organization

\* Strategic Request

Launch Cancel

The **Strategic Request Input Form** will be blank upon opening when starting a new Strategic Request.

To begin inputting data, Users can right-click on any cell in the form and select **“Strategic Request Add Row”** from the top of the pop-up menu. Additionally, Users can access the same pop-up menu by clicking on **Actions**.

**“Strategic Request Add Row”** will open a window for Users to select Account, Organization, and Category. Users can key in member names or use the Member Selector.



# STRATEGIC REQUEST REVIEW FORM



[Strategic Request Review - Next Yr](#) | 
 [Strategic Request Review - Next Yr1](#) | 
 [Strategic Request Review - NextYr2](#)

## Strategic Request Review - NextYear Budget ?

Version: Working | 
 PlanElement: Strategic Request Input | 
 LEntity: The College of New Jersey

			FY21				
			Budget				
			Strategic Request 1	Strategic Request 2	Strategic Request 3	Strategic Request 4	Strategic Request 5
Strategic Initiative	0000 - Default Organization	000 - Default Category	Student Success: Improve	Student Success: Support Holistic	Student Success: Improve	Student Success: Inclusiveness	Student Success: Improve
Area Owner	0000 - Default Organization	000 - Default Category	Housing	School of Humanities & Approved	Office of Information	Office of Enrollment	Student Center
Strategic Request Approval Status	0000 - Default Organization	000 - Default Category	Not Approved				
<b>General Operating Expenses</b>	3417 - Women's Tennis	100 - Instruction - General					
<b>Advertising &amp; Recruitment</b>	1700 - Dean of Nursing, Health & Exercise Science	100 - Instruction - General	15,000				
	1701 - Nursing	100 - Instruction - General	600				
<b>Professional Services Fees</b>	1701 - Nursing	000 - Default Category					5,000
	2700 - Campus Police	000 - Default Category			4,800		
<b>Surplus (Deficit)</b>	0000 - Default Organization	000 - Default Category					
	1700 - Dean of Nursing, Health & Exercise Science	000 - Default Category				50,000	
		100 - Instruction - General	-15,000				

The **Strategic Request Review Forms** allow Users to review all Strategic Requests for their Organization by Year. **Approved** Strategic Requests will be created as new Programs in ERP and PBCS.