Requesting Top Three Priorities using BudgetPak ActionPaks

Overview

This guide contains instructions on how to complete the FY2023 top three college/department priority requests using BudgetPak.

Financial information has been provided in BudgetPak for the completion of the 2023 Budget Development version. BudgetPak contains versions: 2022 Adopted Budget, 2021 Actuals, and 2020 Actuals that can be used to view and aid during the budget planning process.

In this phase each college/department will access the 2023 Budget Development version to enter all three priority requests using ActionPaks. One ActionPak will be required for each priority request leaving a total of three ActionPaks after the request phase has been completed.

Note: Please do not reallocate during the request phase in BudgetPak.

What is an ActionPak?

ActionPaks allow users to itemize each of the top three priorities. Multiple accounts lines with corresponding notes can be tied to a single ActionPak for each of the top three priorities.

Note: Only budget request(s) entered as 'ActionPaks' will be accepted. Please be sure to enter all request(s) as an 'ActionPak'.

What to Expect: Step-by-Step

1	• How to access BudgetPak files
2	• How to create ActionPaks for top three priorities
3	• How to create an ActionPak report
4	• How to mark all sections reviewed and complete
5	• How to sign-off and approve sections (Budget Holders only)

Accessing BudgetPak

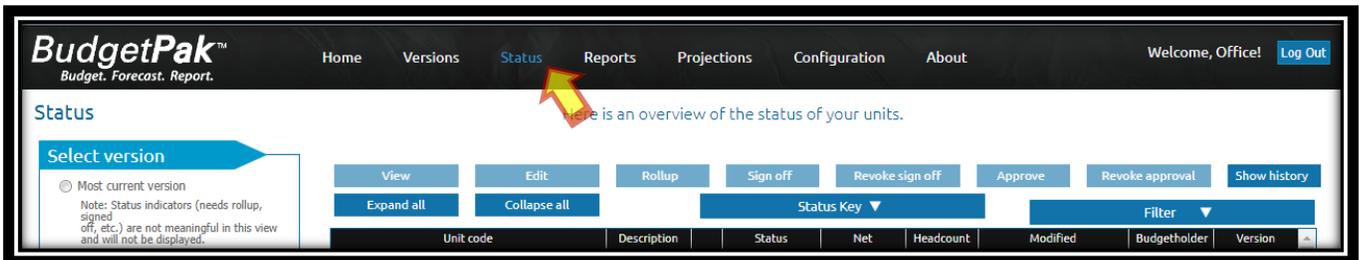**Step 1:** Go to: https://westernu.mybudgetpak.com

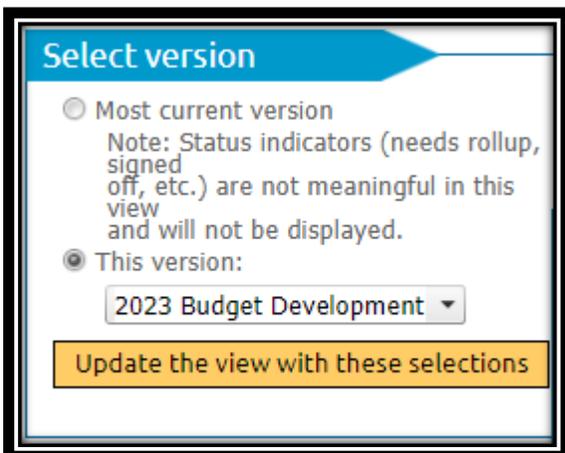**Step 2:** Enter username and password. Click **'Log In'**.
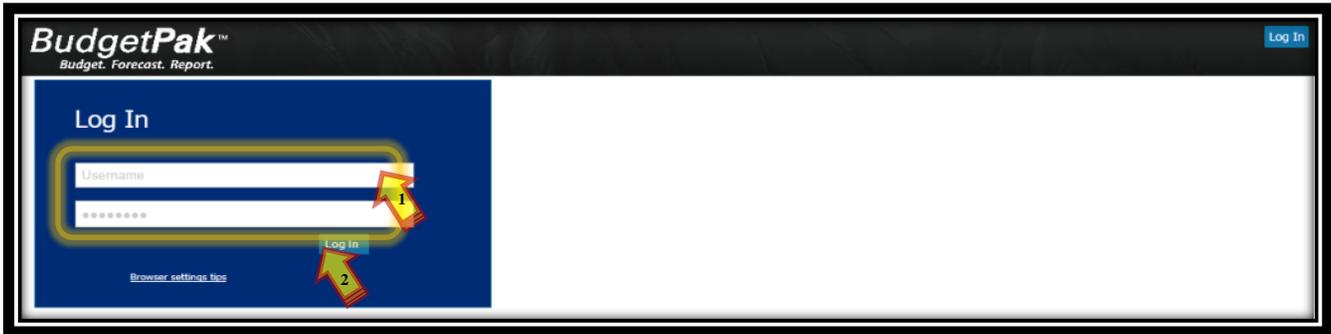
Note: For all Login issues, please contact the budget office at Budget@westernu.edu

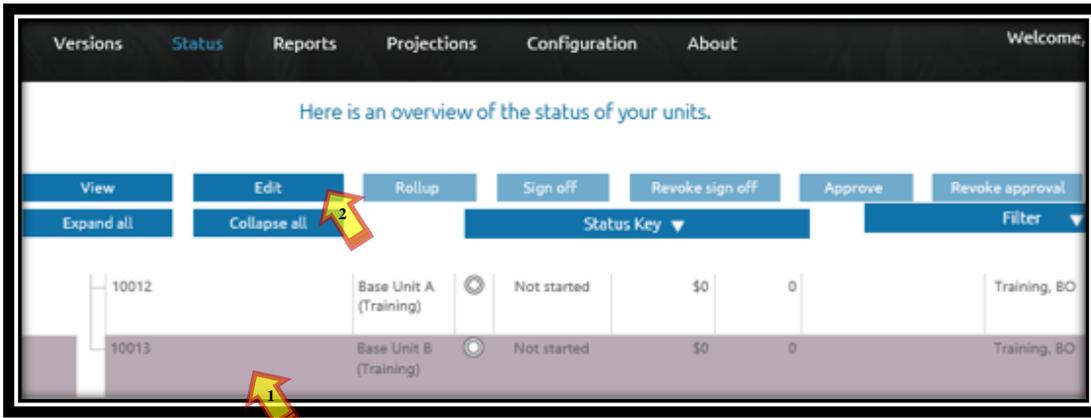# Section I: Accessing BudgetPak Files

Step 1: Click **'Status'**.

Step 2: Select '**2023 Budget Development'** in the **'Status'** menu to the left. Then click '**Update the view with these selections'**
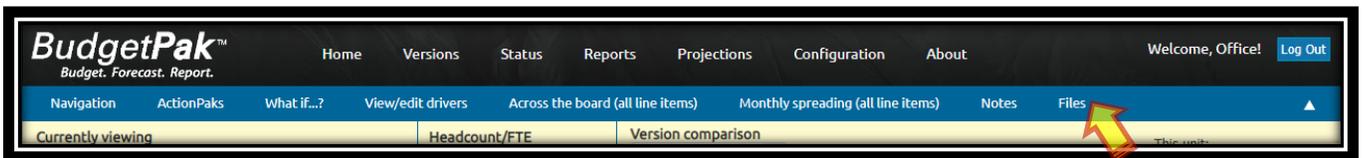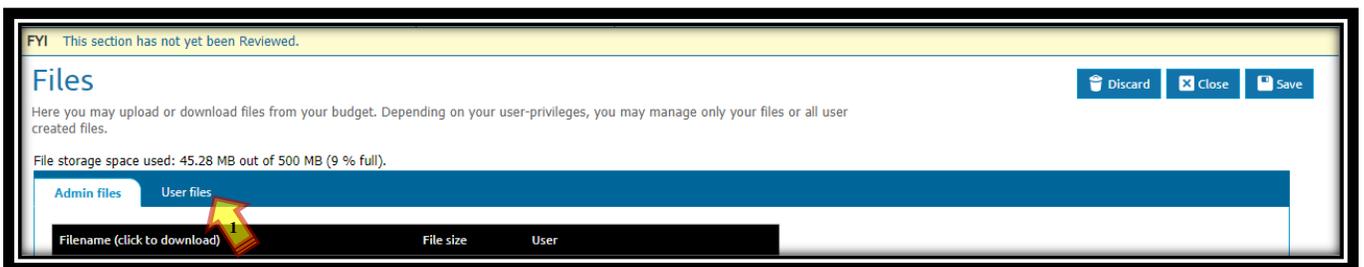
Section I: Accessing BudgetPak Files

Step 3:   Higlight the desired organization/department. Then click '**Edit**'

Step 4:   Click '**Files**' to access the Priority Pools Sheet, BudgetPak Instructions, and Time and Responsibility Schedule.

Step 5: Click on the **'User Files'** tab.

Section I: Accessing BudgetPak Files

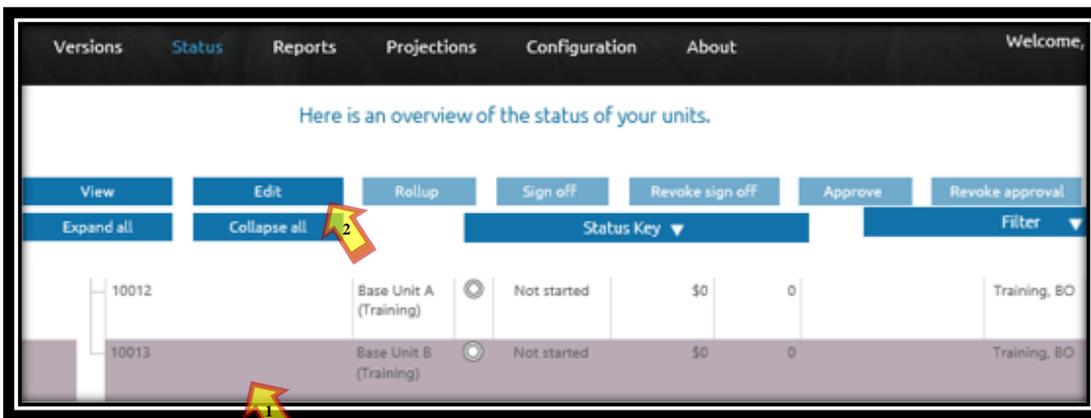**Step 6:** Click desired '**filename**', then click **'Open'** or **'Save'**.
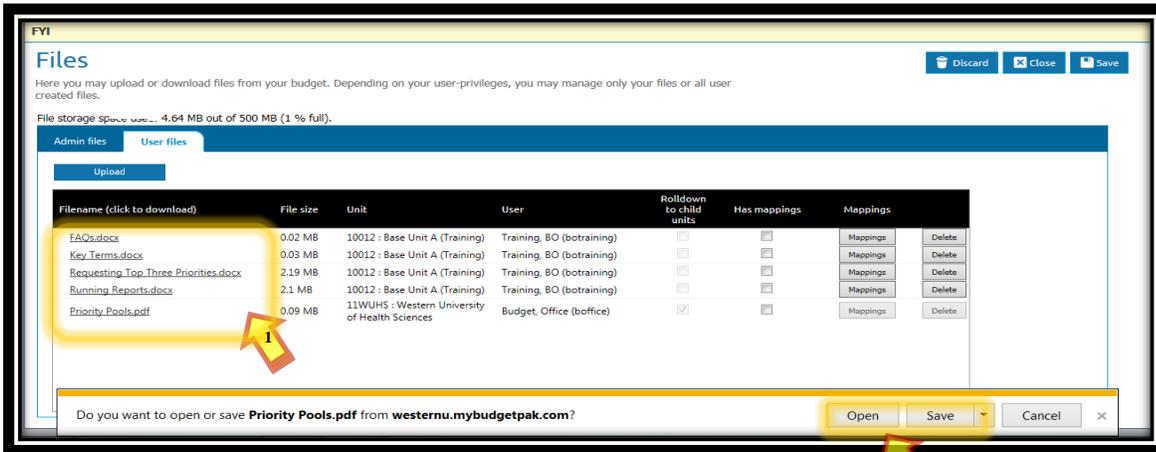
Section II: Creating ActionPaks for Top Three Priorities

Step 1: Click **'Status'**.
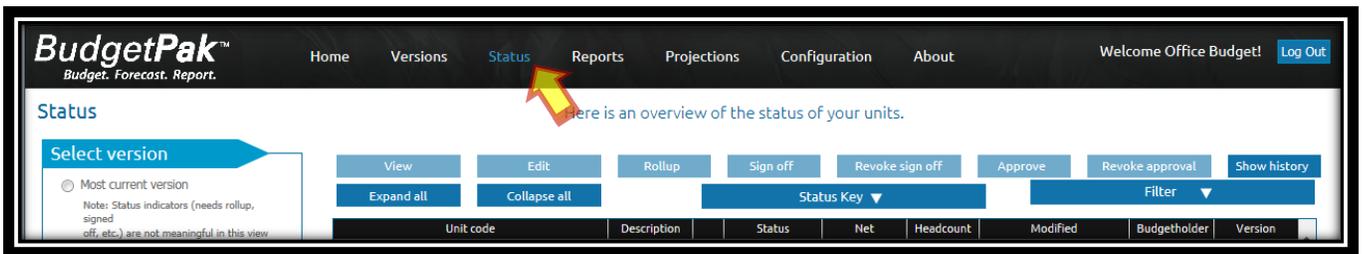
Step 2: Select the desired base unit/organization Click **'Edit'**.

Section II: Creating ActionPaks for Top Three Priorities

Step 3: Click **'ActionPak'** and then click **'Add ActionPak'** to enter the college/department priority request.

Step 4: Under the text field **'Name'** enter **"Pool 1"** or **"Pool 2"** for the corresponding priority pool (refer to Section I: Accessing BudgetPak Files for Priority Pools PDF). Under the text field **'Code'** enter **"Priority 1"**, **"Priority 2"**, or **"Priority 3"** for the priority number you have assigned (1 being most important and 3 being least). Then click **'OK'**.

Section II: Creating ActionPaks for Top Three Priorities

Step 5: Select the **'Line item'** (account name(s))**'** to be used for this priority request, under the **'Accounts available for use in ActionPaks'**. Click on the **'** ⊙ **'** to add each account to the **'Accounts used in this ActionPak'** section. Once all your accounts have been added click **'Save'**.

Note: If the necessary account is not listed under **'Accounts available for use in ActionPaks'**, please contact the budget office.

Step 6: Repeat Steps 1 to 5 to create ActionPaks for each of the three priorities.

Step 7: Click on **'Navigation'** to show ActionPaks. Click on the first **'ActionPak'** to add the budget request amount and description.

Section II: Creating ActionPaks for Top Three Priorities

Note: In this example, all three ActionPaks for the top three priorities have been entered under one unit. If the three ActionPaks are in different base units under one college/department, select the corresponding '**Unit**' to show each ActionPak.

Step 8: Under '**Line item 1 of 2**', click the '**By annual amount**' field, enter the budget request amount for that account. Click on '**Edit**', and then enter the narrative, justification, and timeframe of the request under the pop-up window. Click '**Save**'.

Section II: Creating ActionPaks for Top Three Priorities

Step 9: Repeat step 6, for each additional account, if applicable, click the next tab **'Line item X of X'**. Click **'Save'**.

Step 10: Repeat steps 7-9 for each of the three priorities.

Note: Only budget request(s) entered as '**ActionPaks'** will be accepted. Please be sure to enter all request(s) as an **'ActionPack'**.

Section III: Creating an ActionPak Report

Step 1: Click **'Reports'**, to review all ActionPaks. Click **'View'** under the **'Advanced reporting'** menu
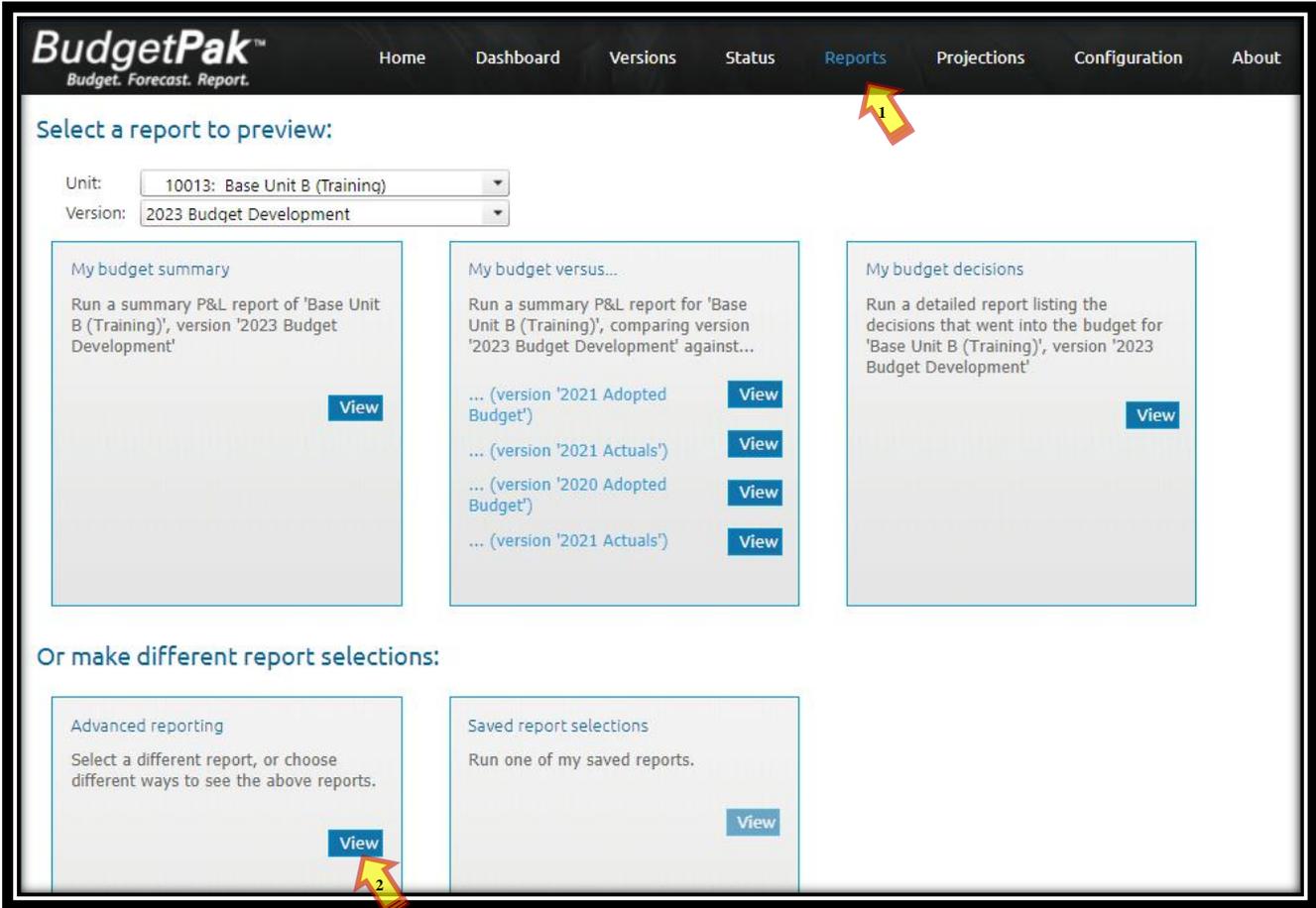
Section III: Creating an ActionPak Report

Step 2: '**Select**' or '**Click**' the following '**Parameters**' for each of the six steps shown under the advanced reporting window:
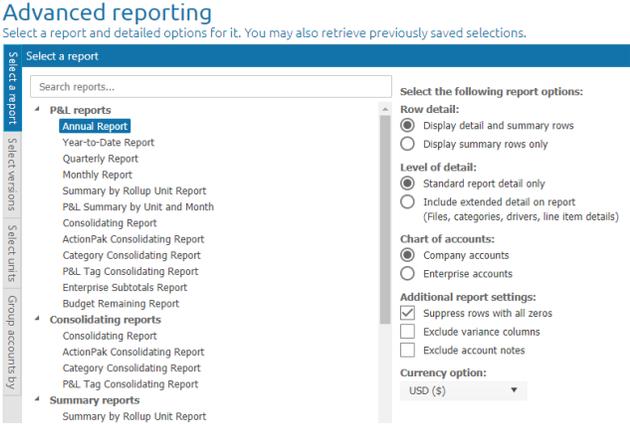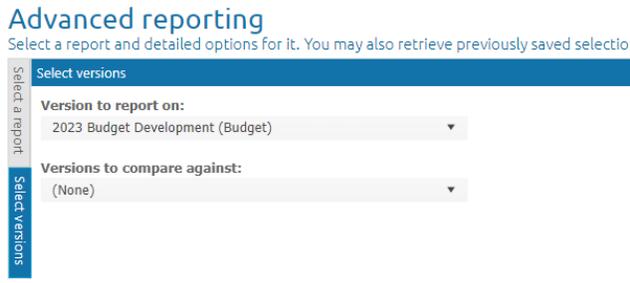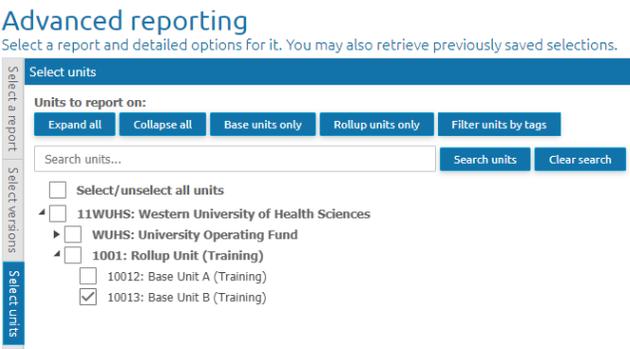
Advanced reporting Select a report and detailed options for it. You may also retrieve previously saved selections. **Select a report** Search reports... ▲ **P&L reports** Annual Report Year-to-Date Report Quarterly Report Monthly Report Summary by Rollup Unit Report P&L Summary by Unit and Month Consolidating Report ActionPak Consolidating Report Category Consolidating Report P&L Tag Consolidating Report Enterprise Subtotals Report Budget Remaining Report ▲ **Consolidating reports** Consolidating Report ActionPak Consolidating Report Category Consolidating Report P&L Tag Consolidating Report ▲ **Summary reports** Summary by Rollup Unit Report **Select the following report options:** **Row detail:** ⦿ Display detail and summary rows ◯ Display summary rows only **Level of detail:** ⦿ Standard report detail only ◯ Include extended detail on report (Files, categories, drivers, line item details) **Chart of accounts:** ⦿ Company accounts ◯ Enterprise accounts **Additional report settings:** ☑ Suppress rows with all zeros ☐ Exclude variance columns ☐ Exclude account notes **Currency option:** USD ($) ▼	1. Click **'Annual Report'** 2. Check off the boxes as shown in the example
Advanced reporting Select a report and detailed options for it. You may also retrieve previously saved selections. **Select versions** **Version to report on:** 2023 Budget Development (Budget) ▼ **Versions to compare against:** (None) ▼	3. Select **'2023 Budget Development'** from **'Version to report on'** 4. Select **'(None)'** from **'Versions to compare against'**

Advanced reporting
Select a report and detailed options for it. You may also retrieve previously saved selections.
 	
Select units
 	
Units to report on:
[Expand all] [Collapse all] [Base units only] [Rollup units only] [Filter units by tags]
 	
Search units... [Search units] [Clear search]
 	
☐ **Select/unselect all units**
▲ ☐ **11WUHS: Western University of Health Sciences**
 ▶ ☐ **WUHS: University Operating Fund**
 ▲ ☐ **1001: Rollup Unit (Training)**
  ☐ 10012: Base Unit A (Training)
  ☑ 10013: Base Unit B (Training)
	5. Select the desired unit.

Section III: Creating an ActionPak Report

Advanced reporting Select a report and detailed options for it. You may also retrieve previously saved selections. **Group accounts by** Select how you want to group your accounts: ○ Group accounts by subtotals ○ Group accounts by sections ● Group accounts by ActionPaks only ActionPaks to report on: [Expand all ActionPaks] [Collapse all ActionPaks] [Search ActionPaks...] ☑ Select all ActionPaks ☐ Include inactive ActionPaks ▲ ☑ **ActionPaks** ☑ Pool 1 (10013: Base Unit B (Training))	6. Select "Group accounts by ActionPaks only" 7. Click "Select all ActionPaks"

Annual Report
• Display detail and summary rows
• Standard report detail only
• Company accounts
• Suppress rows with all zeros
• Currency: USD ($)
• Version to report on:
  2023 Budget Development (Budget)
• 1 unit(s) selected
  10013: Base Unit B (Training)
• No tags selected.
• Group by: ActionPaks
  Pool 1 (10013: Base Unit B (Training))
 	
[View the report]
 	
Your report will appear in a new tab or a new browser window depending on how your browser is configured.
	8. Click '**View the Report**'

Step 3: The report will show all ActionPaks/Priorities each college or department has entered. Reports may be **'Send to PDF'** and/or **'Send to Excel'** by clicking the options shown below.

BudgetPak™ Budget. Forecast. Report.   Reporting

[Send to PDF]   [Send to Excel]   [Send to Excel (data on...]   Send to Excel (data only): For advanced users. Not available for all reports. May include blank columns that are not used with current report selections.

|◄ ◄ 1 of 2 ► ►| ◄   [   ] Find | Next   🖫▼ ⟳

ActionPak Report

Company:	Western University of Health Sciences
Version:	2023 Budget Development
Unit:	10013: Base Unit B (Training)
Budget holder:	Training, BO (botraining)

ActionPak:	Pool 1
ActionPak code:	Priority 1

Account	Description	2023 Budget Development	Notes for 2023 Budget Development
6000	Salaries - Faculty Full Time	$100	
6200	Salaries - Administration Full Time	$50	
Expense	**Pool 1**	**$150**	
TOTAL EXPENSE		**$150**	

Note: Please allow the college/department head to review and approve the reported ActionPaks before proceeding with BudgetPak.

Section IV: Marking all Sections as Reviewed and Complete

Note: Once the college dean or department head has reviewed and approved the requested ActionPaks, the request may be marked as reviewed.

Step 1: Click on **'Versions'**. From the versions tab, select the unit/organization containing the priority request/ActionPak. After the selection has been made click **'Edit'**.

Section IV: Marking all Sections as Reviewed and Complete

Step 2: Click **'Actions'** and click **'Mark all sections Reviewed'**. Click **'OK'** on the pop-up window.

Section IV: Marking all Sections as Reviewed and Complete

Step 3: Once complete, the **'Your budget status is'** indicator will change from **'Started'** to **'Complete'**.
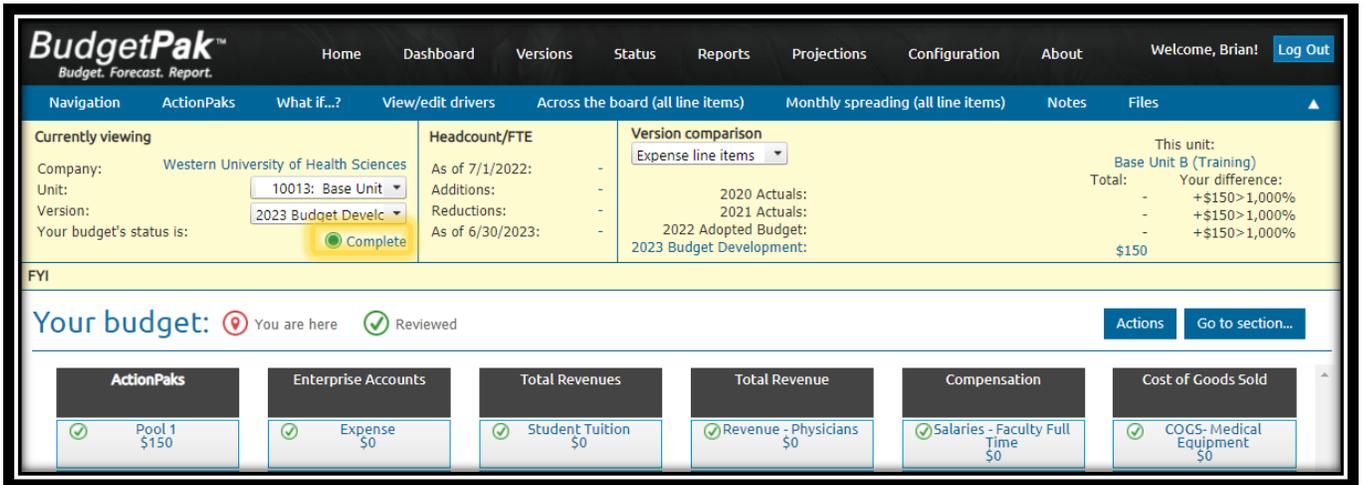
Step 4: Repeat Steps 1-3 for each unit/organization from your college/department.

Note: Only budget request(s) entered as **'ActionPaks'** will be accepted. Please be sure to enter all request(s) as an ActionPak.

Step 5: Click '**Status**'. Click on the **'Needs rollup'** row. Once the row has been selected, it will be highlighted. Click **'Rollup'.**
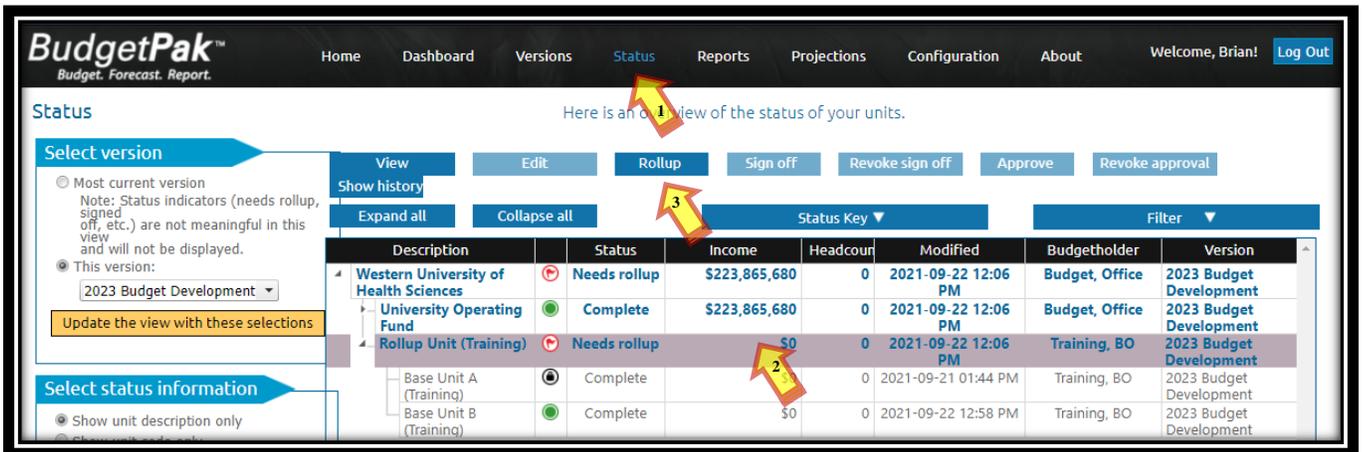
Section IV: Marking all Sections as Reviewed and Complete

Step 6:   Once the **'Rollup Unit'** has been rolled up, the highlighted row status key will change to green, if all **'Base Unit(s)'** have a **'Complete'** status.

Section V: Signing-Off and Approving (Budget Holders Only)

Note: This function is restricted to Budget Holders only.

Step 1: To sign-off on a unit, select each unit/organization row and click **'Sign off'**.

Note: Once the unit has changed the status key will change to signed off as shown below.

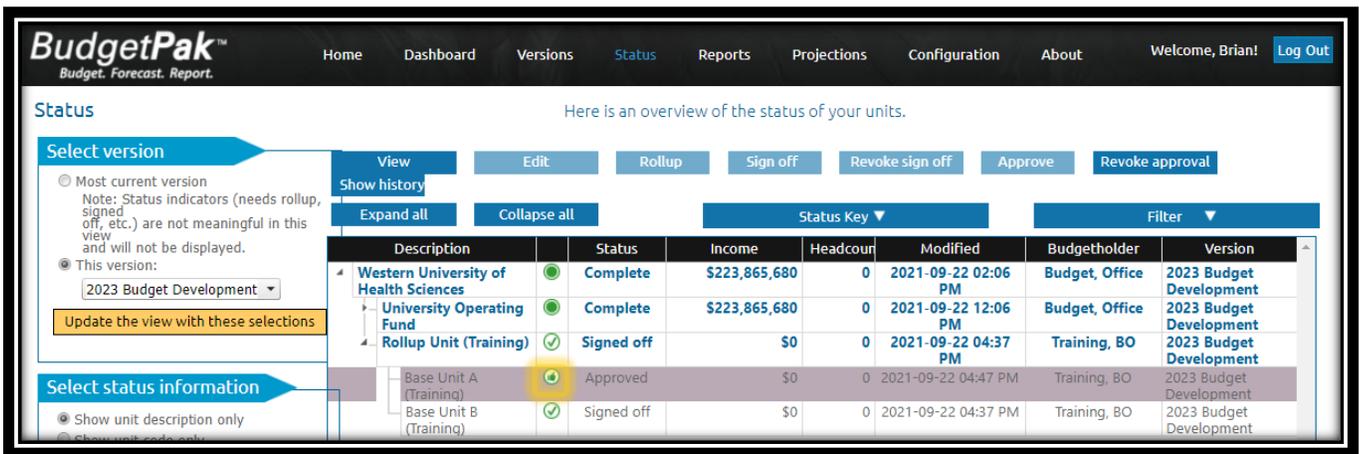# Section V: Signing-Off and Approving (Budget Holders Only)

Step 2: Repeat step 1 for all **'Base unit(s)'** and **'Rollup Unit(s)'.**
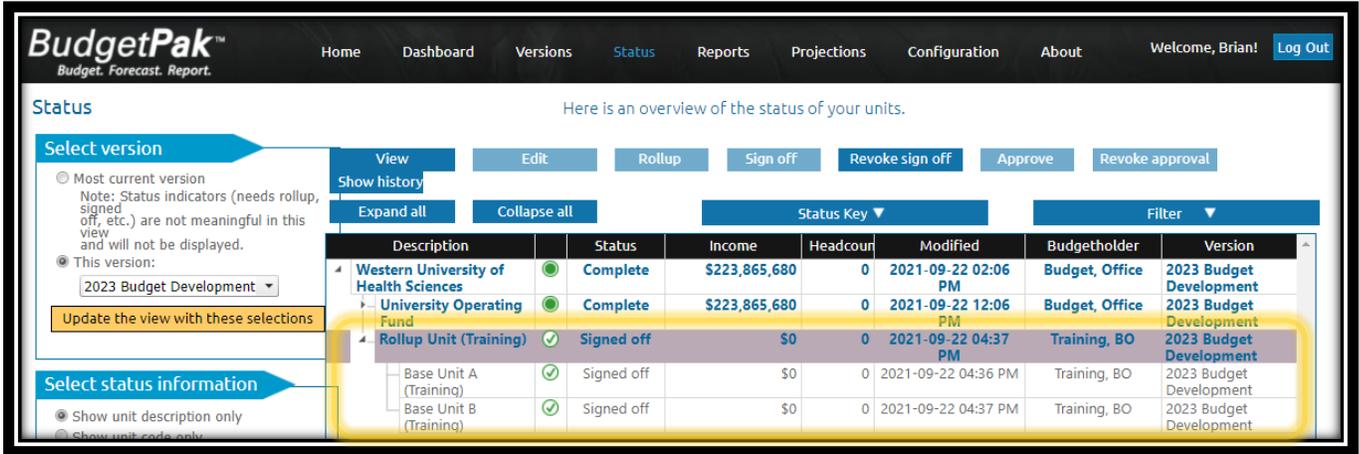
Step 3: To approve a unit, select each Base Unit and Rollup unit/organization. Click **'Approve'**. Repeat this step for all.
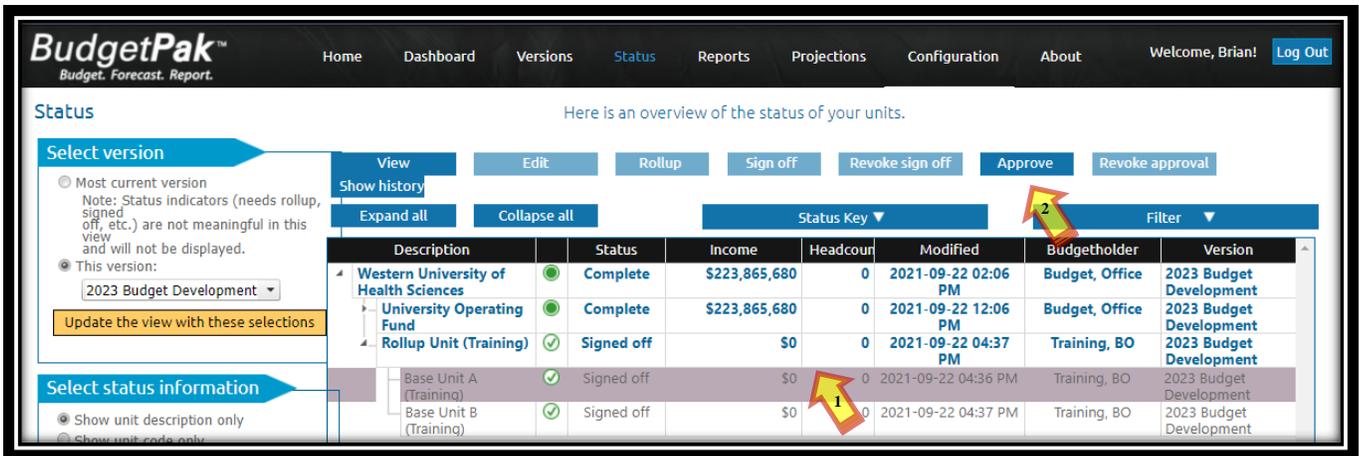
Note: Once the unit has been approved the status key indicator will change to approved as shown below.

Step 4: Repeat step 3 for each **'Base unit'** and **'Rollup Unit'**.