BudgetPak User Guide

Lewis & Clark College

October 2016

Contents

Overview

This Getting Started Guide contains instructions for how to complete your FY2018 Budget (please contact BudgetPak Administrator to find out the current working version). BudgetPak is a web-based software tool that enables consolidation of budget and forecast inputs from across the institution. In some cases, it may also be used for reporting throughout the year.

BudgetPak supports several levels of users. The capabilities you are granted in BudgetPak depend upon your BudgetPak "role," which the Administrator has assigned to you based on your budget responsibilities within your department. Each user's role is associated with his or her user login profile.

Your BudgetPak Administrator is Xi Zhong. If you have any questions you can reach her at x7814. You can also contact Katherine Shallenberger at x7810 for assistance.

Definitions and Set Up

Before beginning to budget, it is important to understand a few terms at Lewis and Clark and how they are used in BudgetPak. The Lewis & Clark account string is comprised of 11 digits. The first seven digits define the specific L&C school and department. These seven digits are referred to as the "**unit**" in BudgetPak. The last four digits of the L&C account string, sometimes referred to as the object code at L&C, describe the type of expense incurred. In BudgetPak, these last four digits are called the "**account**." For example:

Full Account: 30 0 0067 6000

BudgetPak Unit: 30 0 0067 College of Arts & Sciences (300) Music Department (0067)

BudgetPak Account: 6000 Supplies Expense

BudgetPak distinguishes between "**base units**" and "**rollup units**." Base units are the departments where budgets are reviewed and entered, as in the example above. "Rollup units" are special units designed to consolidate or subtotal a group of base units. These units do not have a distinct budget, but hold the subtotal of all base units below. Most BudgetPak users will be dealing with base units.

In BudgetPak your unit(s) and their accounts have already been set up for you. You will be accessing each account and entering its annual expense or revenue budget amount

Fiscal year runs from June 1 through May 31. FY2015 Actuals, FY2016 Actuals and FY2017 Budget have been loaded into BudgetPak for reference. The instructions below describe how to view and print reports, so that you can use these numbers as a guide to creating this year's budget.

Logging In to BudgetPak

Recommended Browser: **Firefox**

To open BudgetPak:

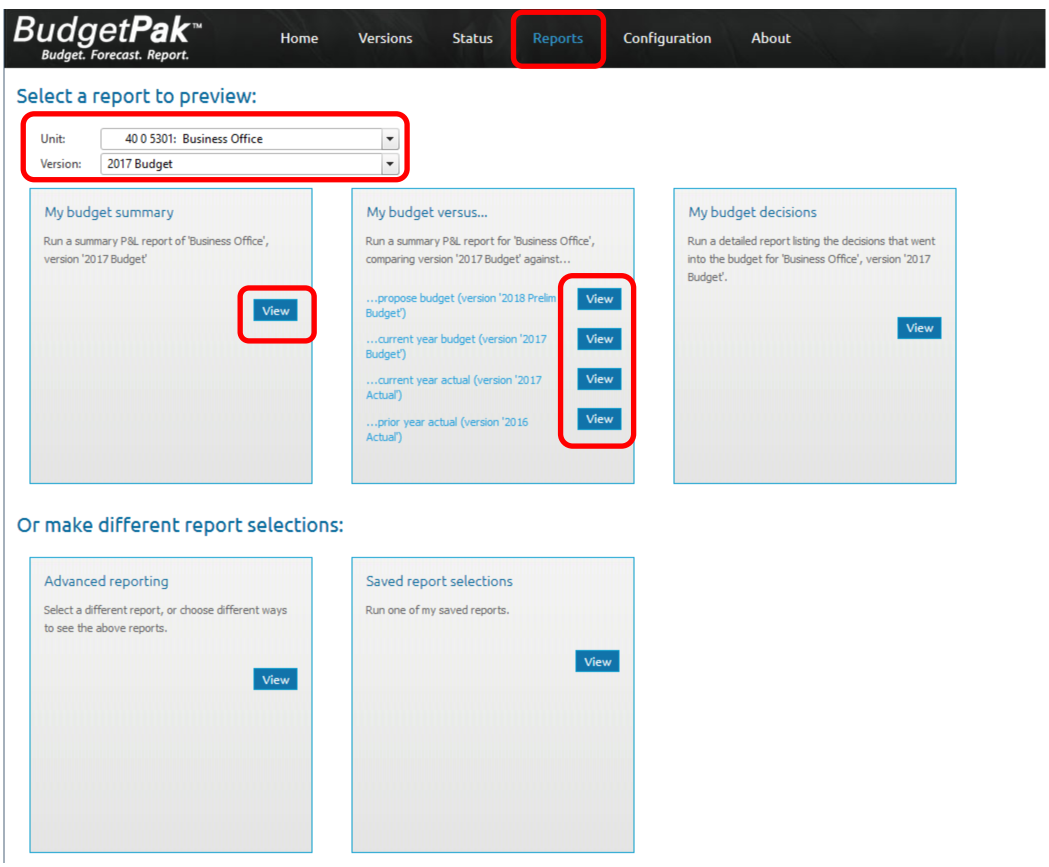
1. Locate the BudgetPak link that has been emailed to you. Note: The link is also available on the Business Office website. The BudgetPak Log In box displays.
2. In the first box, enter the username you use to access your computer and email.
3. In the second box, enter the password that was assigned to you.
4. Click the **Log In** button.
5. Change your password when prompted if it is your first time logging in to BudgetPak.

Recommended BudgetPak Work Flow:

Reviewing Current and Historical Budget and Actual Information

If you would like to create your Budget without reviewing the current or historical Budget and Actual Report, please skip this section and move to the next section, Creating Your Budget. To start by reviewing historical and current budget information, click on **Reports** on the navigation bar.

- Step 1, Select the **Unit** and **Version** you would like to review before budgeting.
- Step 2, Run and review current and historical reports
    - Click **View** under My Budget Summary box to review the P&L report for a specific version you selected
    - Select the comparison report you would like to view under My budget versus… box to run the comparison report



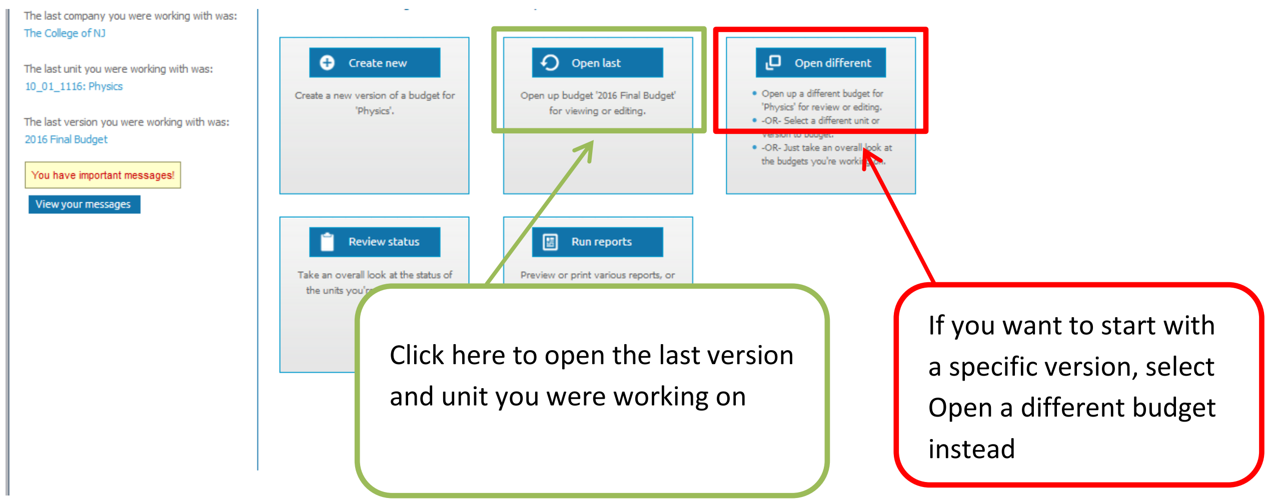
Note: More detail instruction for Reporting can be found in **Viewing Budget Reports** section.

Creating Your Budget

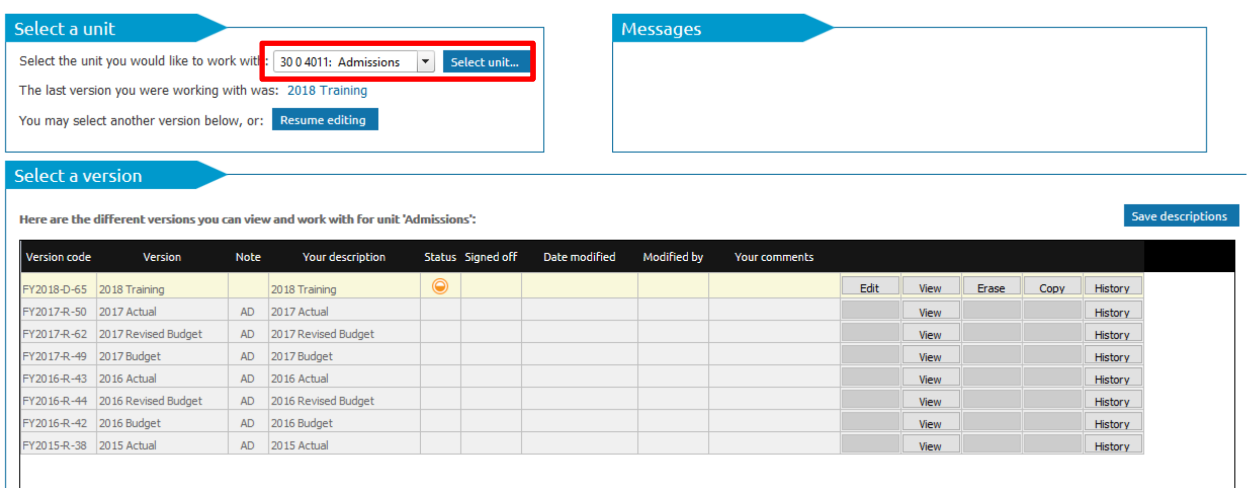
NOTE: All Budgets were started for you using prior budget.

From the Main Menu:

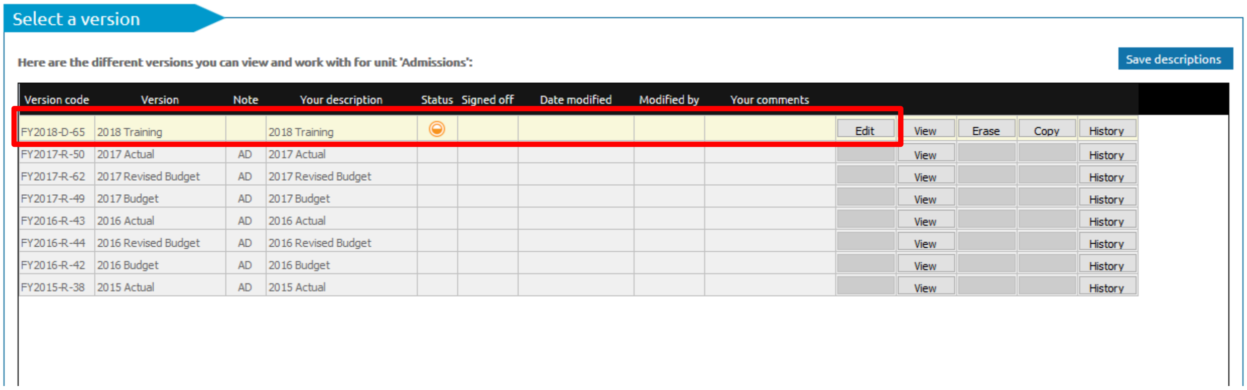
1. The first time you login, select **Open Different** to view and modify a unit budget. If you have already started a budget, you may select **Open Last** to return to the previous unit.



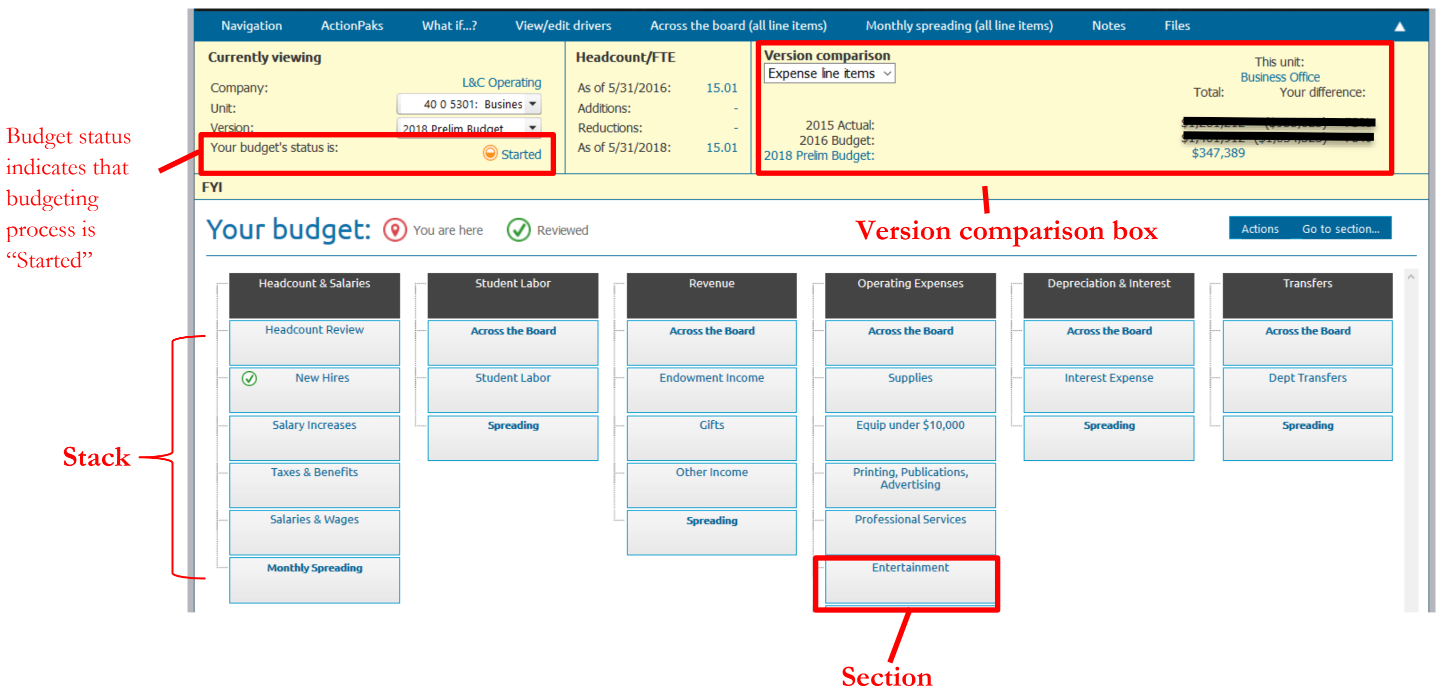
2. In the **Select a unit** panel of the box that displays, select the department or unit you want to budget (use the drop-down menu or click the 'Select unit' button to view the list of options).



3. In the **Select a Version** panel, click **Edit** in the working version row (please contact BudgetPak Administrator to find out the current working version).



4. This brings you to the **Navigation Window** for the unit.



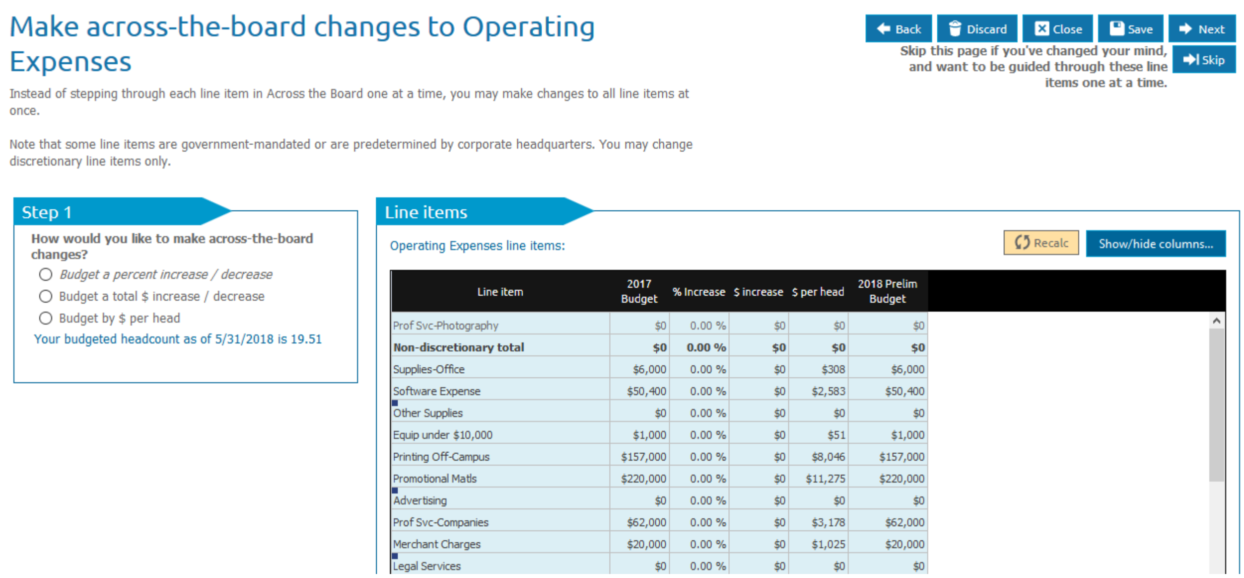
NOTE: In BudgetPak each column in the Navigation Window is called a "**stack**;" and each box is called a "**section**." Sections may contain multiple accounts. If at any time you wish to return to this window, click Navigation at the top left of the window. As you work through the budget process, green check marks will appear in sections that you have reviewed and updated. Once all sections have been checked, BudgetPak will allow you to sign off on the budget. The following instructions walk you through the process of reviewing and updating the stacks and sections.

Using the Budget Navigation Page to enter Annual Budget Amount

There are three methods to review and update accounts for the non-headcount related stacks:
Method 1: Across the Board (for all accounts in the stack at once);
Method 2: Review each section and account individually
Method 3: Use the Monthly spreading to both enter and spread budgets

METHOD 1: Across the Board (ATB) Changes – Ability to change all accounts in a stack.

To make changes **Across the Board**, click the **Across the Board section** at the top of the stack; the **<u>Make across-the-board changes</u>** window displays.



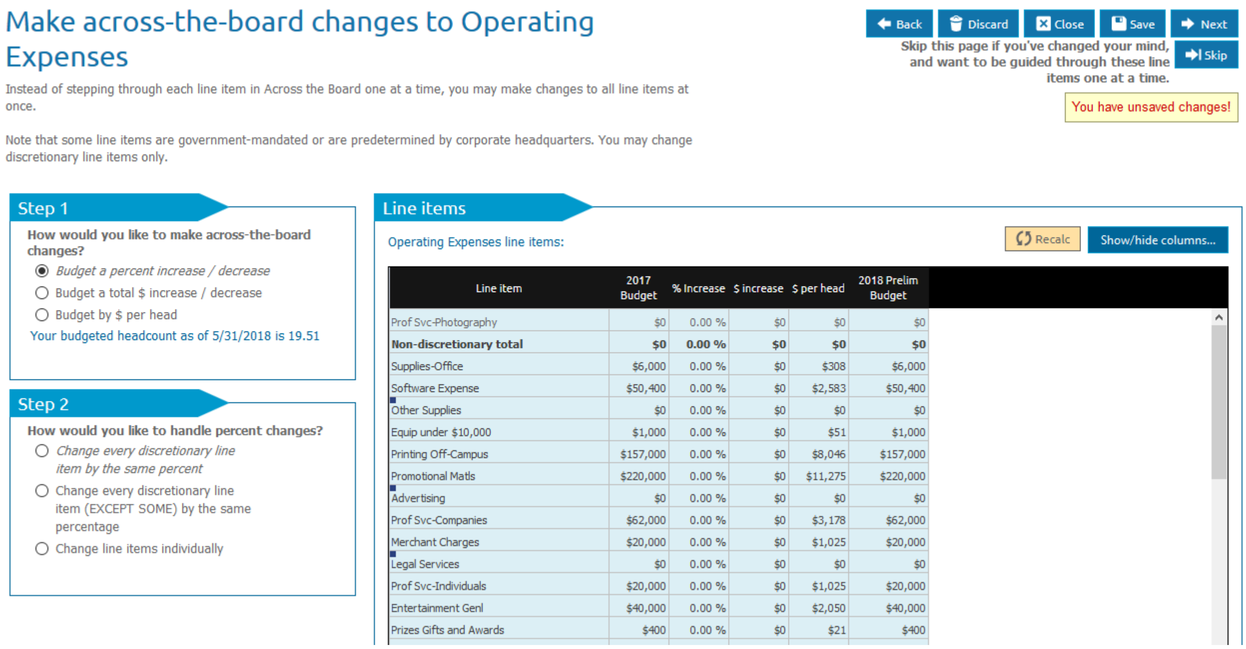
i. Step 1 of the Make across-the-board changes window, select the option you would like to use.

   a) **Budget a percent increase/decrease** will apply the specified percentage to each line item shown in the Line items box on the right side of the window.

   b) **Budget a total $ increase/decrease** will allocate the specified dollar amount to each line item so the total increase/decrease in the stack is the specified dollar amount.

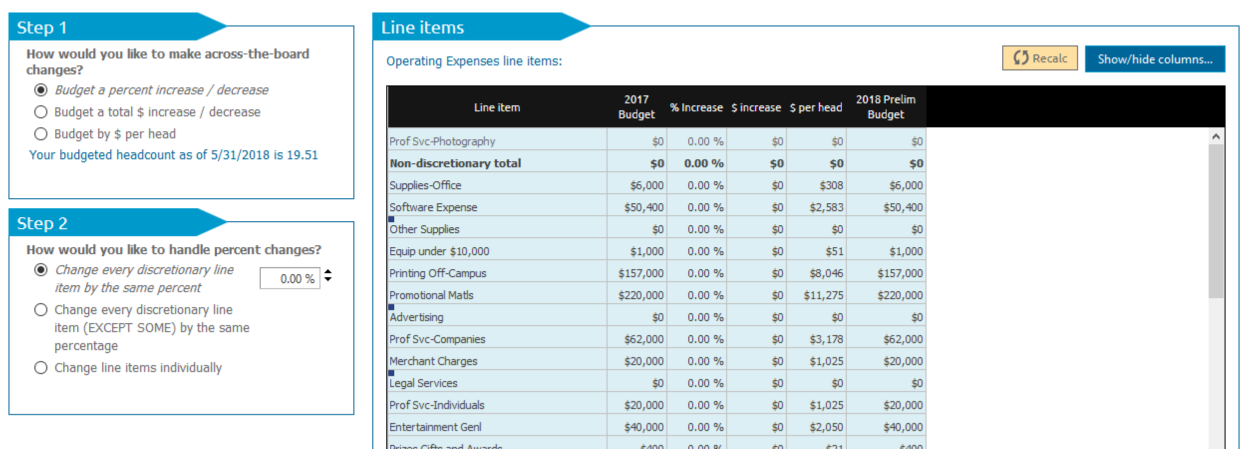
   c) **Budget by $ per head** will allocate the specified dollar amount per head to each line item so the total dollar amount per head in the stack is the specified dollar amount per head. NOTE: The Budget by $ per head is not recommended by the Finance Office.

ii. When you select a method in **Step 1**, the **Step 2** box will appear. In the **Step 2** box, select the option you would like to use to apply the across the board change.

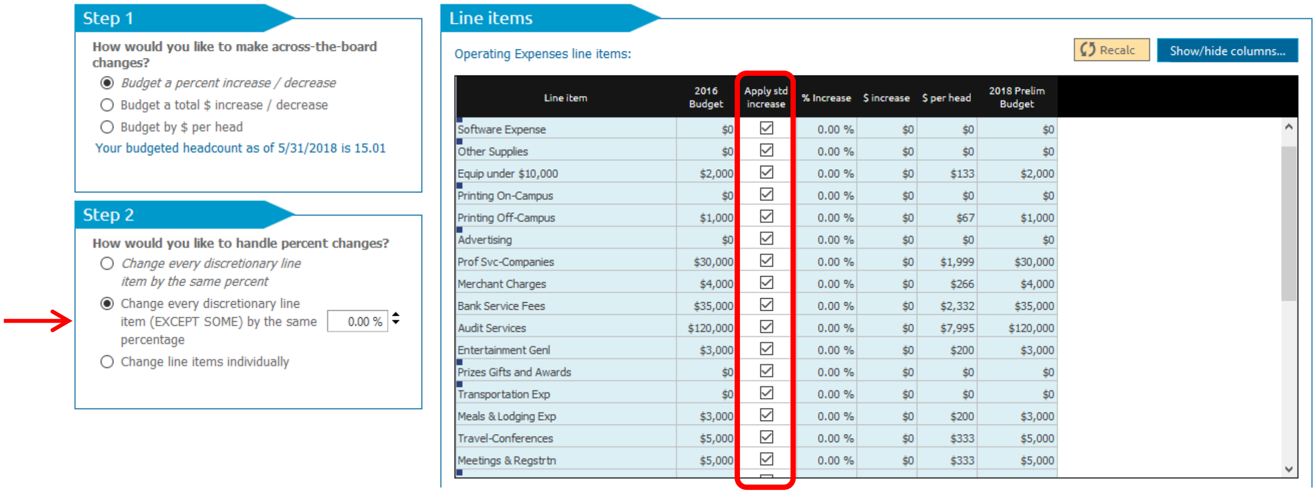


iii. If you selected **Budget a percent increase/decrease** in Step 1

a) **Change every discretionary line item by the same percent** will allow you to enter a percentage to increase or decrease all line items.

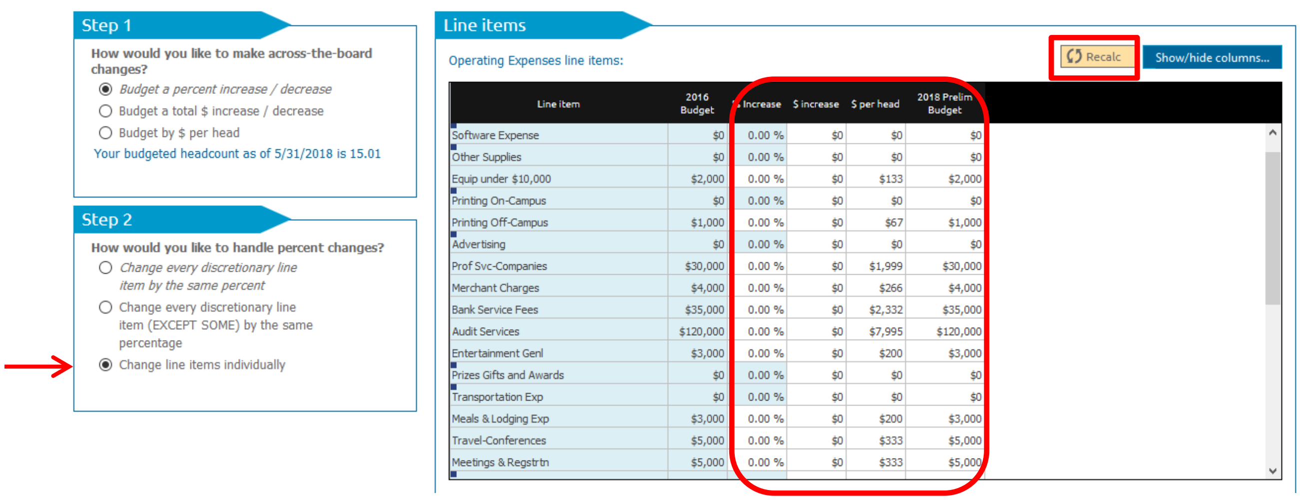


b) **Change every discretionary line item (EXCEPT SOME) by the same percentage** will allow you to check/uncheck line items in the Apply standard increase column and enter a percentage to increase or decrease the selected line items. The percentage entered will only be applied to the checked line items.



Line item	2016 Budget	Apply std increase	% Increase	$ increase	$ per head	2018 Prelim Budget
Software Expense	$0	☑	0.00 %	$0	$0	$0
Other Supplies	$0	☑	0.00 %	$0	$0	$0
Equip under $10,000	$2,000	☑	0.00 %	$0	$133	$2,000
Printing On-Campus	$0	☑	0.00 %	$0	$0	$0
Printing Off-Campus	$1,000	☑	0.00 %	$0	$67	$1,000
Advertising	$0	☑	0.00 %	$0	$0	$0
Prof Svc-Companies	$30,000	☑	0.00 %	$0	$1,999	$30,000
Merchant Charges	$4,000	☑	0.00 %	$0	$266	$4,000
Bank Service Fees	$35,000	☑	0.00 %	$0	$2,332	$35,000
Audit Services	$120,000	☑	0.00 %	$0	$7,995	$120,000
Entertainment Genl	$3,000	☑	0.00 %	$0	$200	$3,000
Prizes Gifts and Awards	$0	☑	0.00 %	$0	$0	$0
Transportation Exp	$0	☑	0.00 %	$0	$0	$0
Meals & Lodging Exp	$3,000	☑	0.00 %	$0	$200	$3,000
Travel-Conferences	$5,000	☑	0.00 %	$0	$333	$5,000
Meetings & Regstrtn	$5,000	☑	0.00 %	$0	$333	$5,000

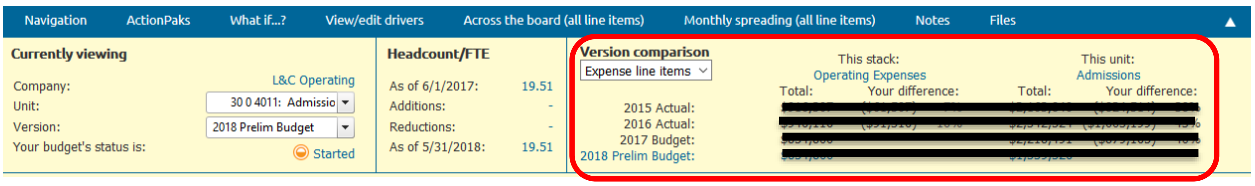
c) **Change line items individually** will allow you to manually enter a percent increase/decrease in the % increase column for each line item. To enter a percent increase/decrease, double click the % increase box for the line item and type in the desired percentage.



Line item	2016 Budget	Increase	$ increase	$ per head	2018 Prelim Budget
Software Expense	$0	0.00 %	$0	$0	$0
Other Supplies	$0	0.00 %	$0	$0	$0
Equip under $10,000	$2,000	0.00 %	$0	$133	$2,000
Printing On-Campus	$0	0.00 %	$0	$0	$0
Printing Off-Campus	$1,000	0.00 %	$0	$67	$1,000
Advertising	$0	0.00 %	$0	$0	$0
Prof Svc-Companies	$30,000	0.00 %	$0	$1,999	$30,000
Merchant Charges	$4,000	0.00 %	$0	$266	$4,000
Bank Service Fees	$35,000	0.00 %	$0	$2,332	$35,000
Audit Services	$120,000	0.00 %	$0	$7,995	$120,000
Entertainment Genl	$3,000	0.00 %	$0	$200	$3,000
Prizes Gifts and Awards	$0	0.00 %	$0	$0	$0
Transportation Exp	$0	0.00 %	$0	$0	$0
Meals & Lodging Exp	$3,000	0.00 %	$0	$200	$3,000
Travel-Conferences	$5,000	0.00 %	$0	$333	$5,000
Meetings & Regstrtn	$5,000	0.00 %	$0	$333	$5,000

White cells are editable. To enter a decrease, enter the percentage or dollar amount with a minus sign (i.e. -5.00% or -$500). To apply manual changes made in the Line items table, click the **Recalc** button at the top right of the table. If at any point you need to clear the changes made in **Across the Board**, click the **Discard** button.

The Version Comparison box will show both the total budget and variances for the stack you are viewing as well as the total budget for the unit.



iv. Click **Save.** Click **Close** to return to the **Navigation** window and select the next stack you wish to review/edit.

v. When you have reviewed all sections, you can go up to Action, and selected "Mark all as reviewed".

METHOD 2: Review each section and account individually

i. To view and make changes to each account individually, click any section you want to budget. The Account window displays. Some sections *may* contain multiple accounts. For example, the Supplies section may contain accounts 6000 and 6075. Each account appears as a separate tab.

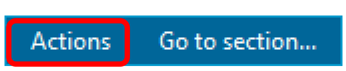
ii. In Step 1 of the Annual total for [account name] window, an annual amount based on last year's budget is displayed. You can either accept this amount or use one of the other methods (**by annual amount, by percent increase, by per head, by line item detail, by driver x rate, by advanced modeler**) to change the annual amount. Note: Advanced modeler method is not recommended at this time.

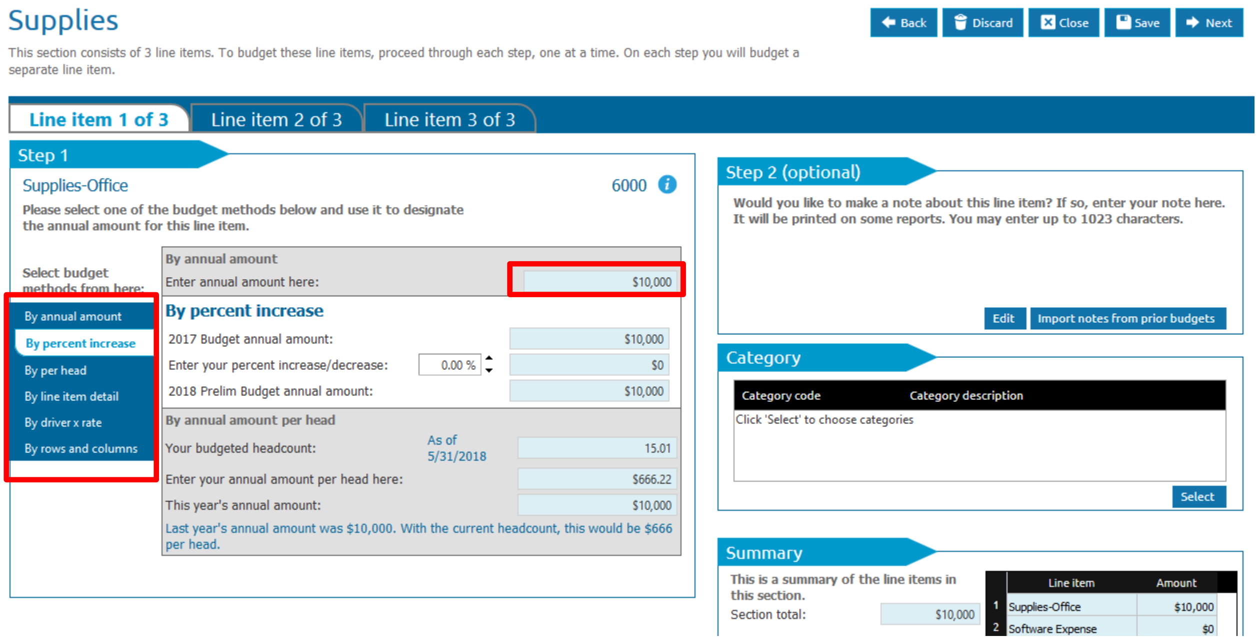
iii. In Step 2, enter any relevant comments about the account and its annual budget amount in the text box provided.

iv. Repeat ii and iii for each line item of the section.

v. Click **Save**. Selecting **Close** will return you to the Budget Navigation Window. **Next** will move you to the next section in the stack.

vi. When you have reviewed all sections, you can go up to Action, and selected "Mark all as reviewed".





METHOD 3: Using the Spreading Method for Budget Entry

BudgetPak spreads expenses throughout the year according to how expenses were incurred in prior years. This can be shown by clicking on the **Spreading** section at the bottom of each stack on the Budget Navigation page. You can also use this screen to change or input the budget.

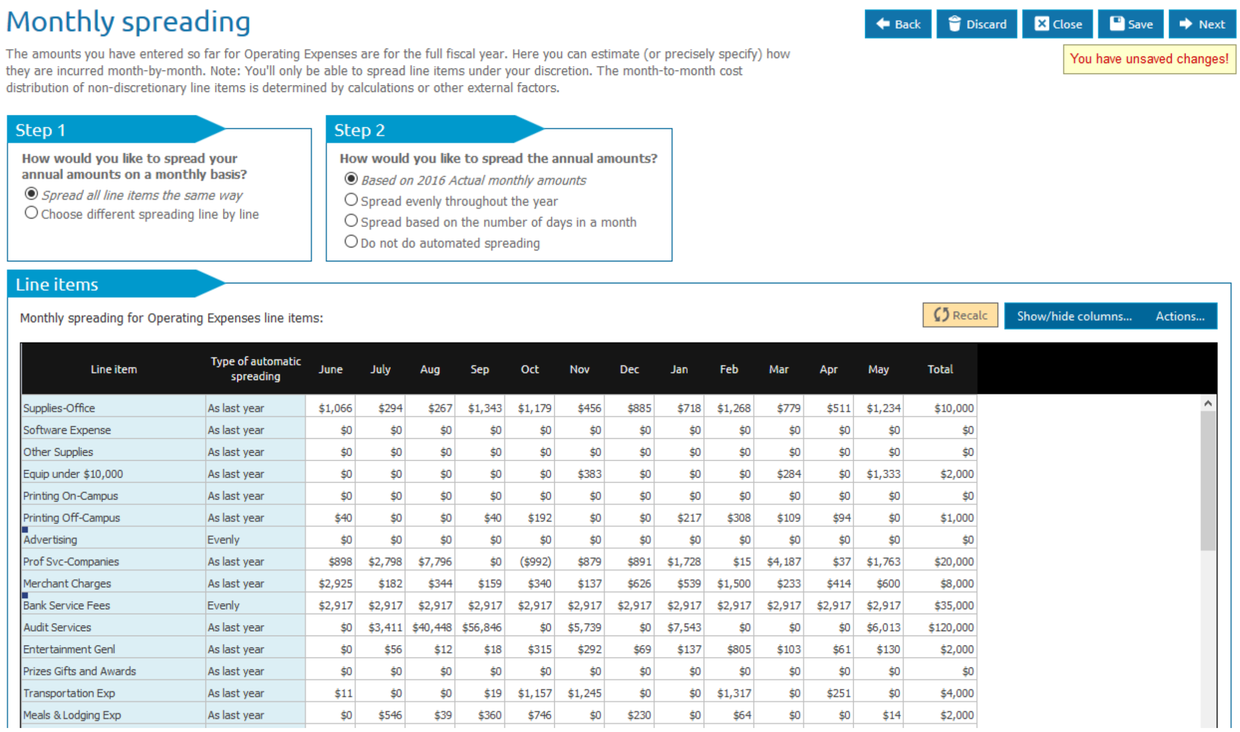
i) If you would like to spread all the line items the same way:

(1) In **Step 1** of the spreading page that displays, accept the default, **Spread all line items the same way**.

(2) In Step 2, accept the default, **based on FY2016 Actual monthly amounts**. Selecting this option will distribute each monthly amount according to the seasonality reflected in the noted version.

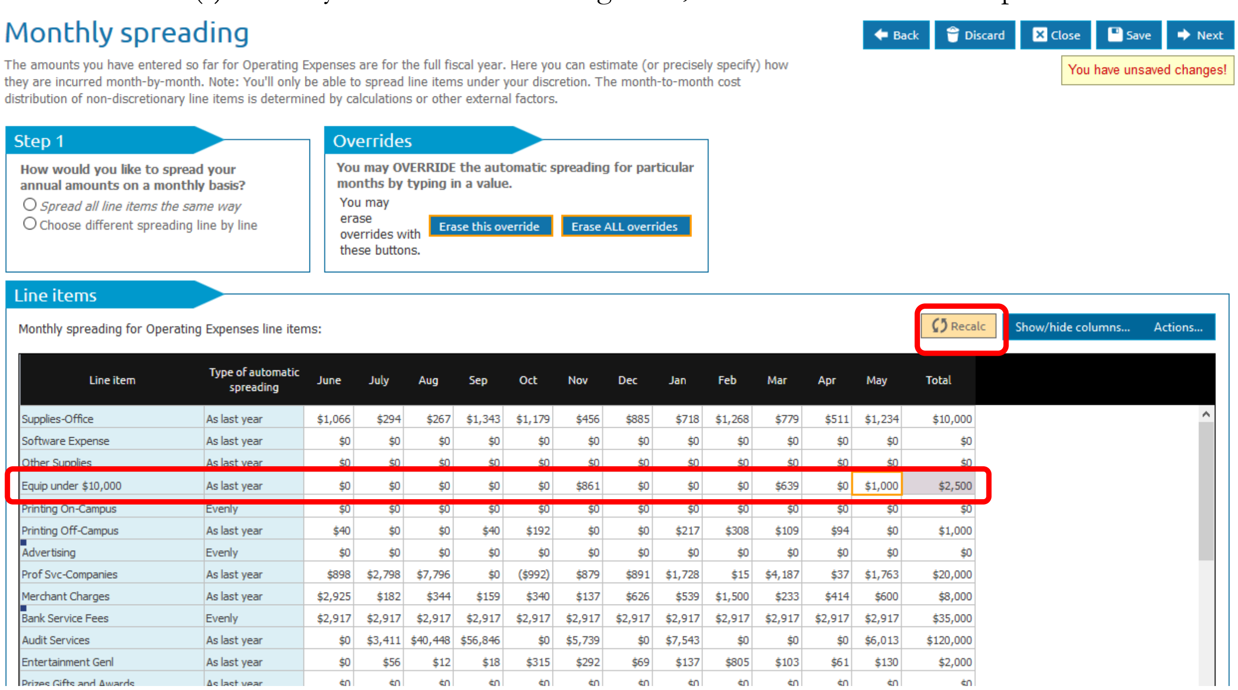
(a) If you click on the grid and hover on a cell, the reference data for the line item and month will be displayed.

Lewis & Clark College

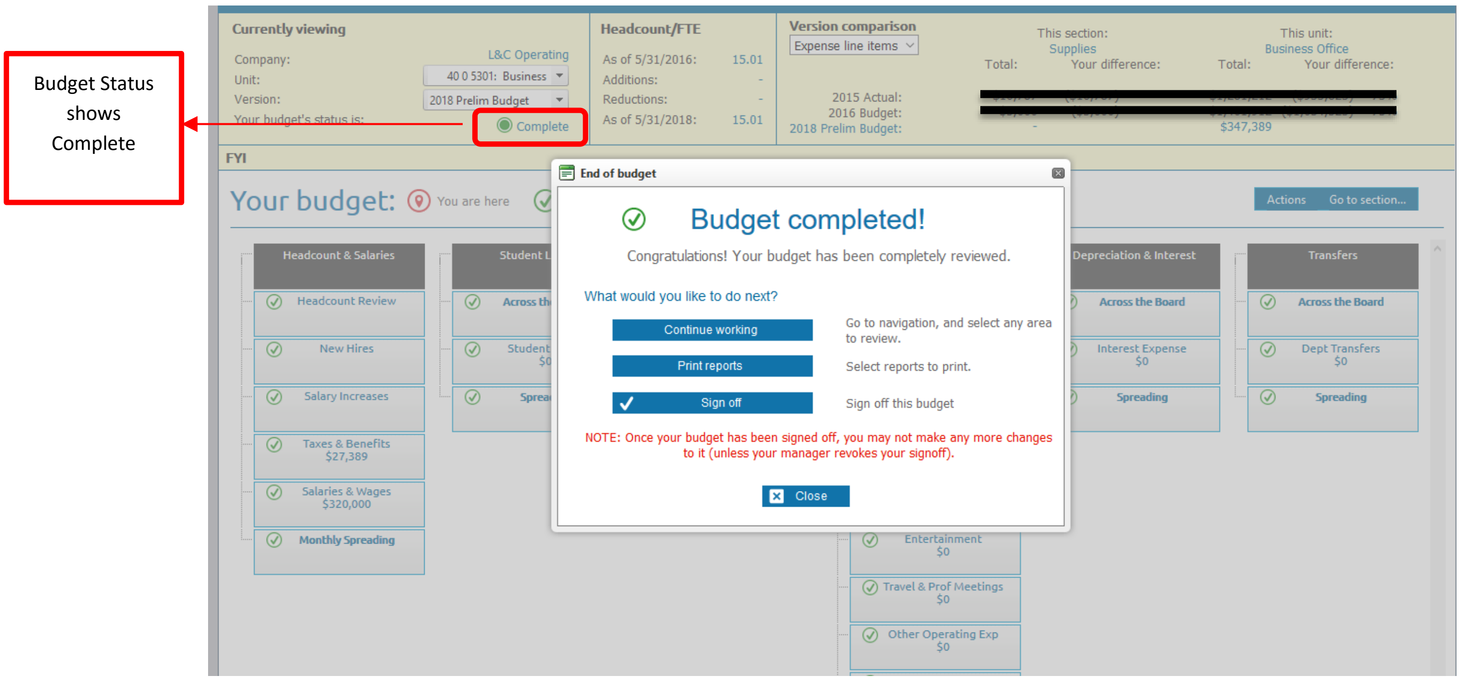


(b) You may change the total, and the monthly amounts will be re-spread. You may also override automated spreading for particular months by directly entering a value for the month; this forces the month to have that value. The background color turns to yellow for overrides.

(c) When you are finished editing a cell, click **Recalc** button to update it.



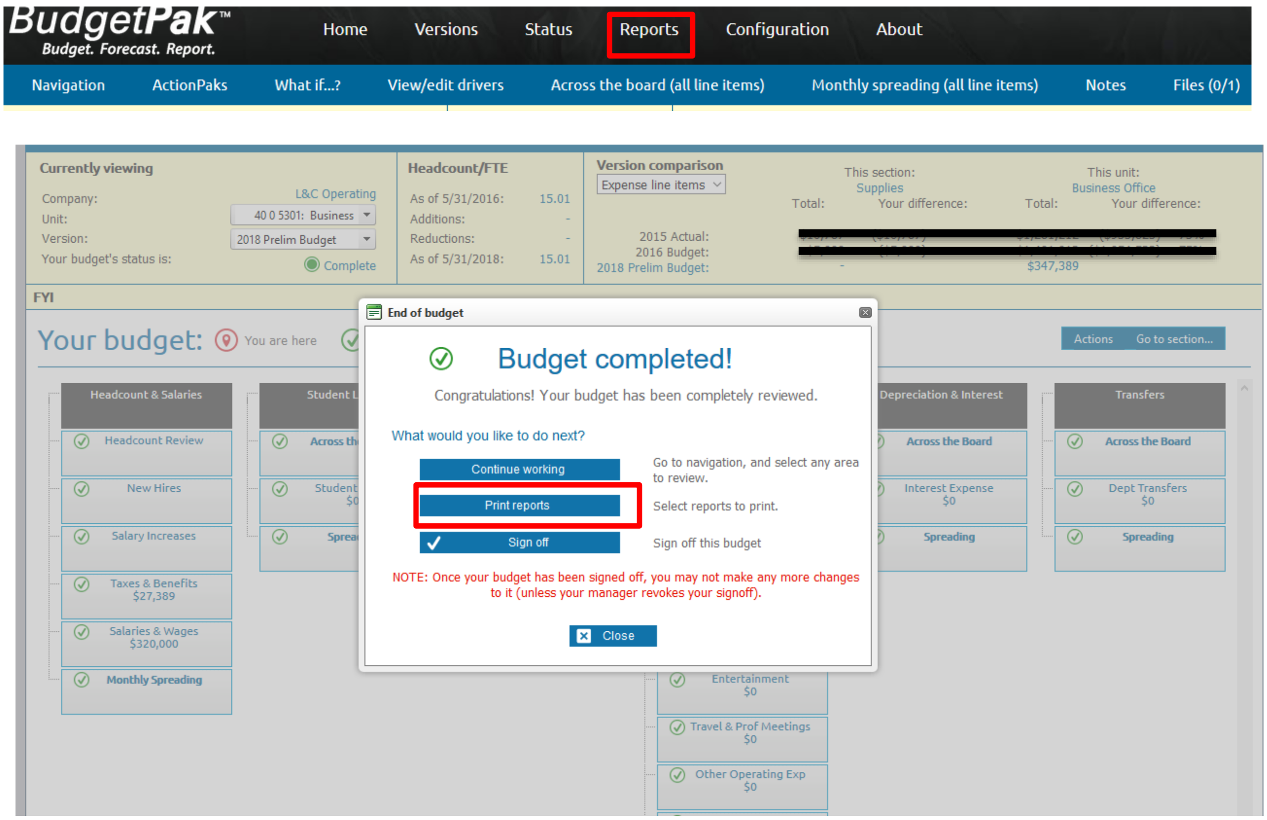
2. Once you have completed all the necessary steps, all sections will have a green check mark to indicate that a budget amount has been entered and reviewed. A **Budget Completed** pop up box will appear and the budget status will change to “Complete” with a green circle. From here you can select **Continue working** if you would like to enter **ActionPaks** or review an area, select **Print reports** if you would like to view reports for your budget, or **Close** if you are done with the budget.



If you are finishing your budget and do not need to budget for specific projects, you can skip the ActionPaks – Budgeting for Specific Projects section and directly go to **Completing and Signing-off on your Budget** section. Or, **Viewing Budget Reports** section.

Viewing Budget Reports

1. You can access the reporting menu either from the Budget Completed box by clicking **Print reports** or by clicking **Reports** in the top bar of the screen.



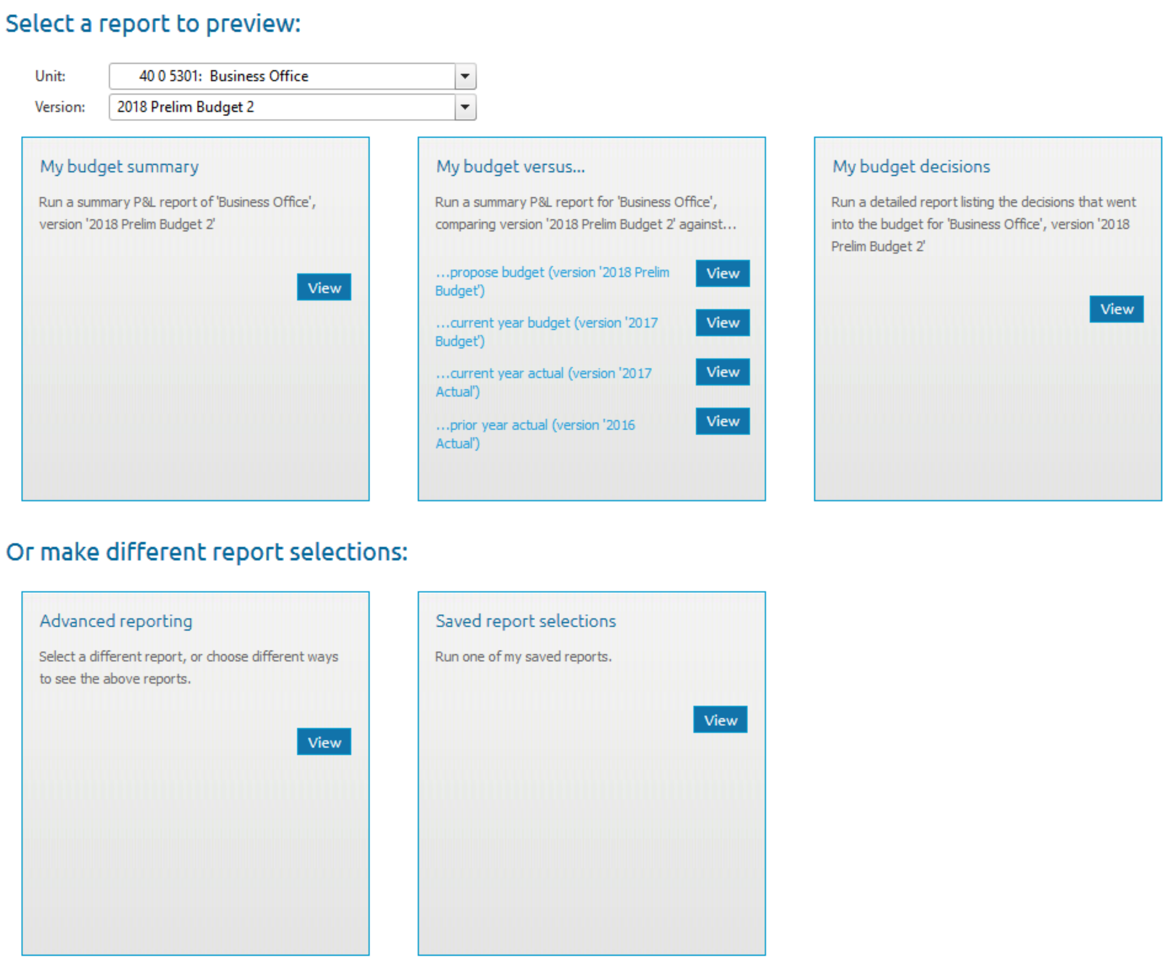
2. Standard Reports and Advanced Reports

   a. There are three standard BudgetPak reports: Click **View** to see the reports on the last version and unit you were working on

      i. Budget Summary: Click to run a P&L report, broken out by standard subtotals.

      ii. My budget versus…: Click to run a summary P&L report comparing to different versions.

      iii. My budget decisions: to run a detailed report listing the decision that went into the budget.



b. Running a report from the Advanced Reporting page

i. Step 1: select the type of report you want to run. There are two major categories separated by two tabs: P&L reports, and other reports.

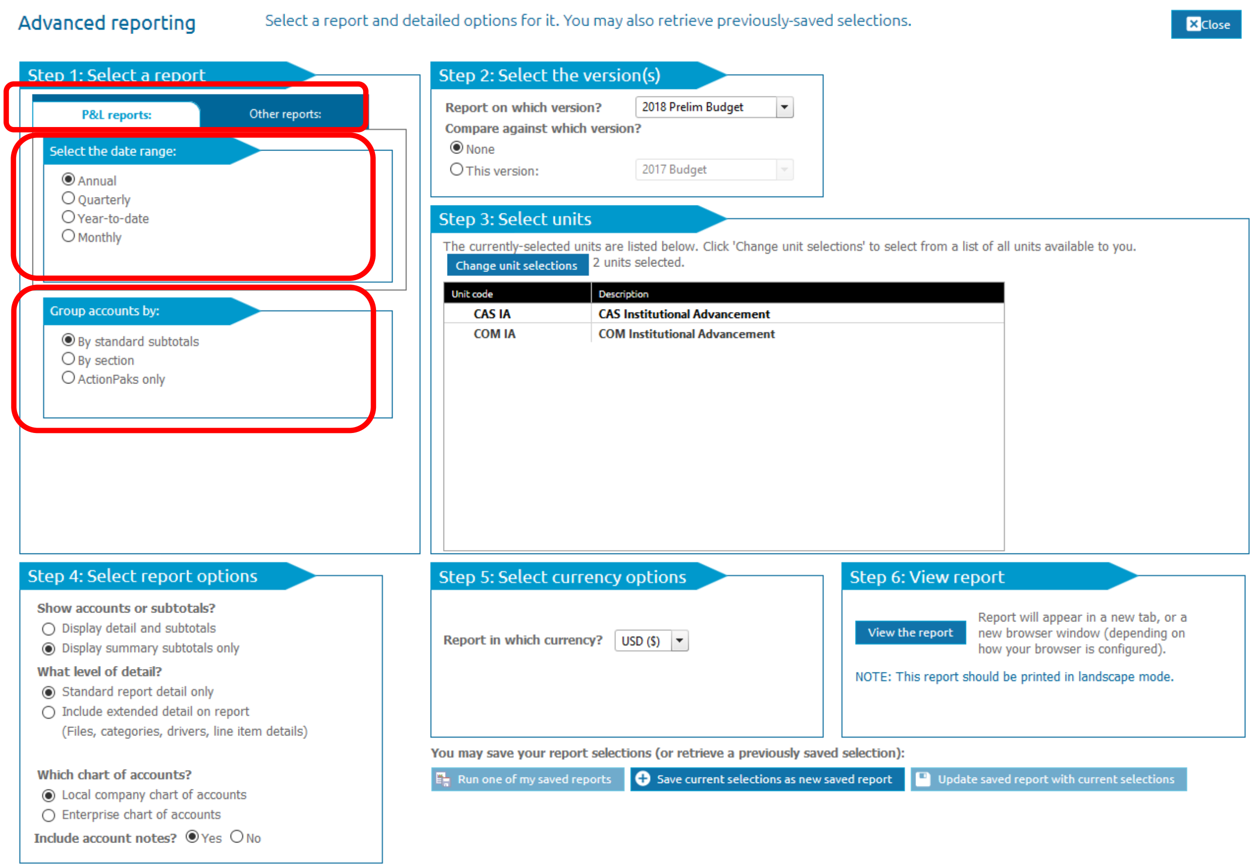
1. P&L Report: you select the date range for the report: Annual, Quarterly, Year-to-date, or Monthly. Lewis & Clark budgets on an annual basis. For this reason Quarterly, Year-to-Date, and Monthly reports can be easily misinterpreted and are not recommended. Please consult your BudgetPak administrator before running these reports.

2. Then you select how the accounts should be grouped.

a. By standard subtotals: It will group the accounts by standard P&L subtotals established by the administrator.

b. By section: it will group the accounts on the report in the same way that they are grouped by the sections on the budget navigation map (including ActionPaks if any).

c. ActionPaks only: it will group the accounts on the report by the ActionPaks . Only ActionPaks will be included on the report; non-ActionPak sections are excluded automatically



ii. Step 2, select the version you want to report on. You may optionally choose a variance version

iii. Step 3, select the unit. Within this step the list of units displayed is enabled only if unit selection is relevant to the particular report currently selected.

iv. Step 4, select additional report option. You can choose whether to show subtotals only on the report, or show account detail as well.

v. Step 6, select preview the report. Click preview the report in a new browser tab, or a new browser window.

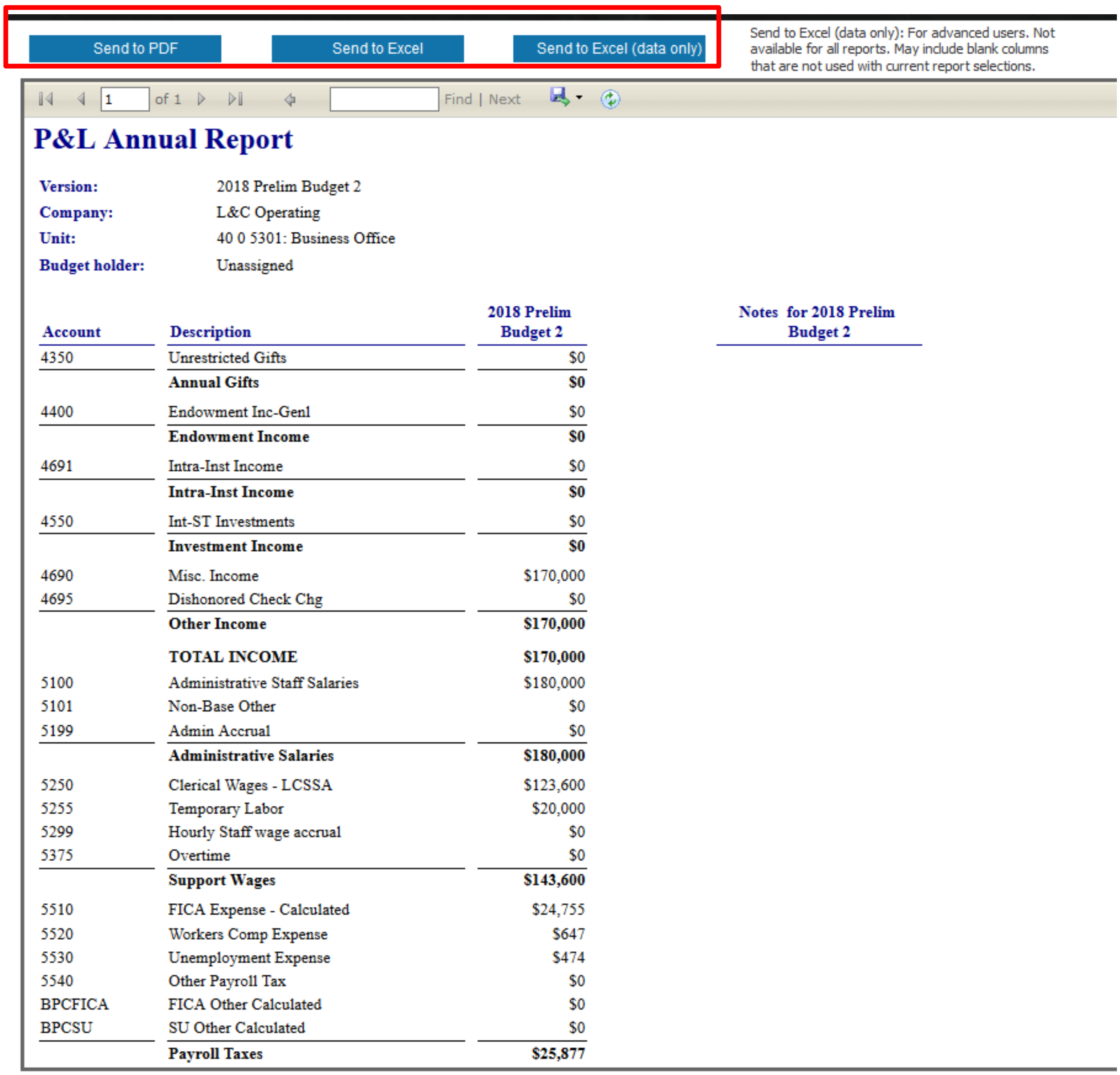
3. A tour of the Report Preview page

a. Flip through the different pages of the report with forward/back buttons

b. Report can be downloaded to a **PDF file** or export to **Excel** or **Excel (Data only)**

   i. Send to Excel: formulas are not exported, just values

   ii. Send to Excel (data only): download the raw report data, unformatted, to Excel. This is useful if you want to explore the data further with pivot tables, etc.

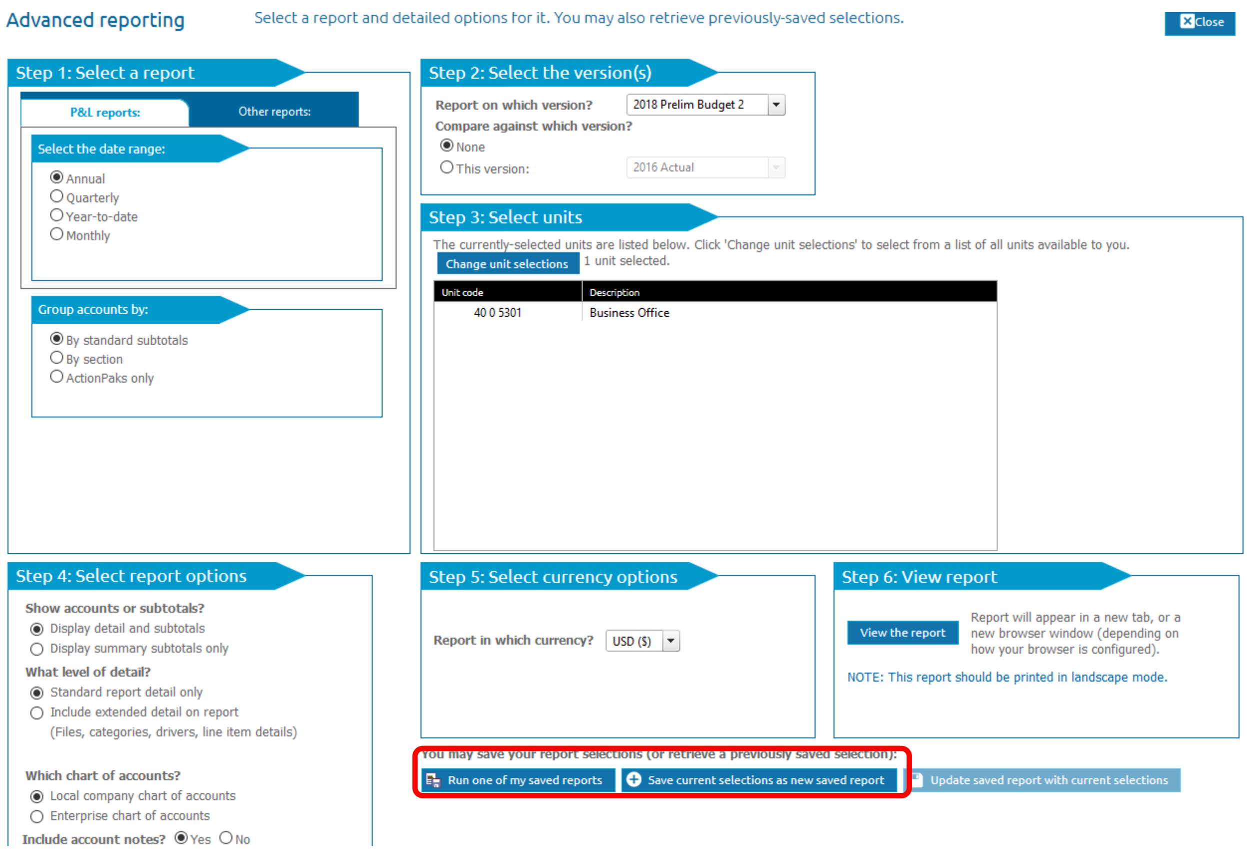


P&L Annual Report

Version: 2018 Prelim Budget 2
Company: L&C Operating
Unit: 40 0 5301: Business Office
Budget holder: Unassigned

Account	Description	2018 Prelim Budget 2	Notes for 2018 Prelim Budget 2
4350	Unrestricted Gifts	$0	
	Annual Gifts	**$0**	
4400	Endowment Inc-Genl	$0	
	Endowment Income	**$0**	
4691	Intra-Inst Income	$0	
	Intra-Inst Income	**$0**	
4550	Int-ST Investments	$0	
	Investment Income	**$0**	
4690	Misc. Income	$170,000	
4695	Dishonored Check Chg	$0	
	Other Income	**$170,000**	
	TOTAL INCOME	**$170,000**	
5100	Administrative Staff Salaries	$180,000	
5101	Non-Base Other	$0	
5199	Admin Accrual	$0	
	Administrative Salaries	**$180,000**	
5250	Clerical Wages - LCSSA	$123,600	
5255	Temporary Labor	$20,000	
5299	Hourly Staff wage accrual	$0	
5375	Overtime	$0	
	Support Wages	**$143,600**	
5510	FICA Expense - Calculated	$24,755	
5520	Workers Comp Expense	$647	
5530	Unemployment Expense	$474	
5540	Other Payroll Tax	$0	
BPCFICA	FICA Other Calculated	$0	
BPCSU	SU Other Calculated	$0	
	Payroll Taxes	**$25,877**	

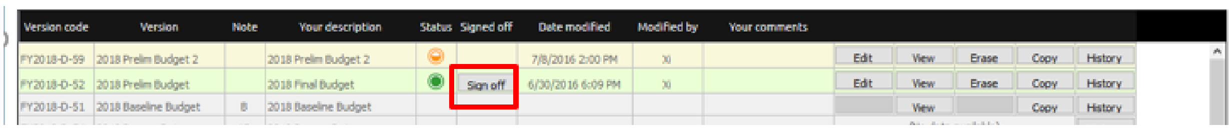
4. You have the capability to save and re-run your report selection.



Completing and Signing-off on your Budget

In order to complete your budget, each stack/account must be reviewed. Green check marks indicate a section has been reviewed. When all sections contain a green checkmark, the budget is complete and can be "signed off." Follow these instructions to sign off on your budget. On the toolbar at the top of the window, click **Versions**. The <u>Version Selection</u> window displays.

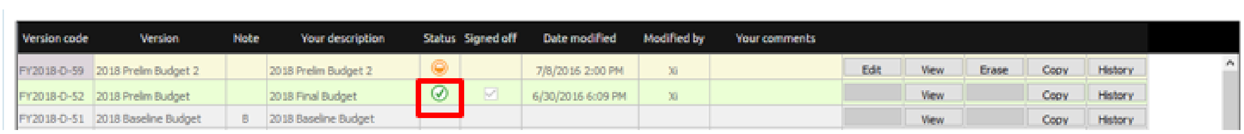
1. In the **Select a Unit** panel, select the department you want to submit for approval.
2. You will see a sign-off button in the green highlighted row.



   a. Click the **Sign-off** button;

   b. Click **Yes** to confirm you want to sign-off on the budget. The budget is now signed-off and ready to be approved by Approval Managers. Once a budget is signed-off, you can no longer make any changes to it, unless your Approval Manager re-opens that budget for you.

3. Your budget is now complete and you may log out of BudgetPak.

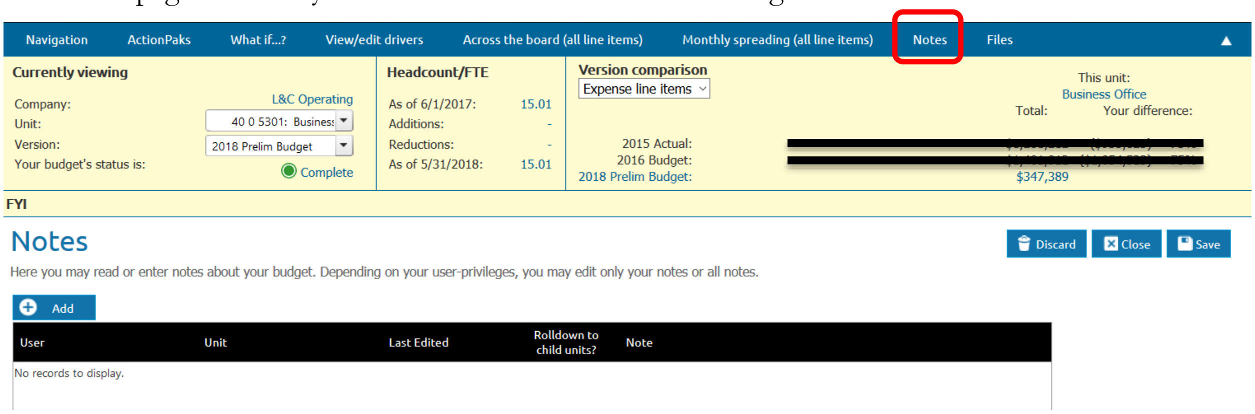


NOTE: For <u>each</u> department for which you are responsible for submitting a budget, all of the steps in all of the sections above must be completed.

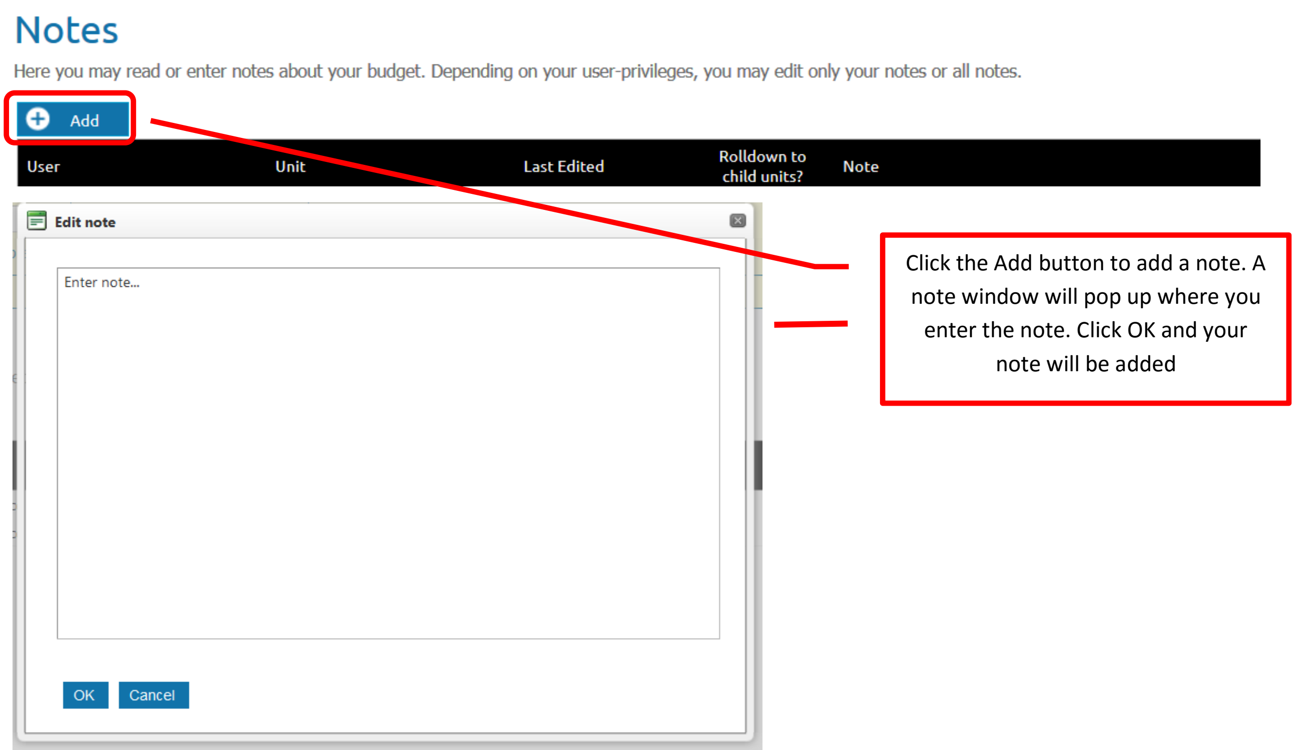
Lewis & Clark College

Appendix 1 - Notes and Files

The notes page is where you can attach notes to an entire budget at once.



1. Adding a note



<u>User</u>: The user who added the note. Last name, First name (username)

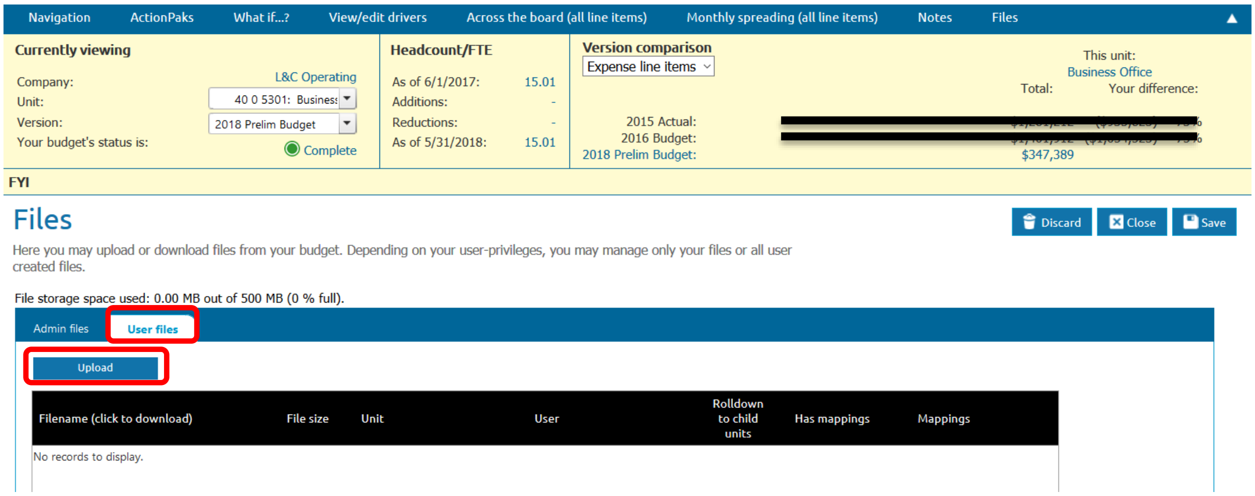
<u>Unit</u>: The unit the note was added

<u>Last Edited</u>: Date and time the note was last edited

Rolldown to child units: If you want this note to appear in all units that are children of this unit. This box will only be enabled when you are in a rollup (summary) unit. A note entered in a "base unit" will always appear in all units that are parents, grandparents, etc of the note's unit.

2. Files

Files may be uploaded as supporting documents for budget decisions. Use the Upload button to upload files to BudgetPak's server.



Filename: List of files.

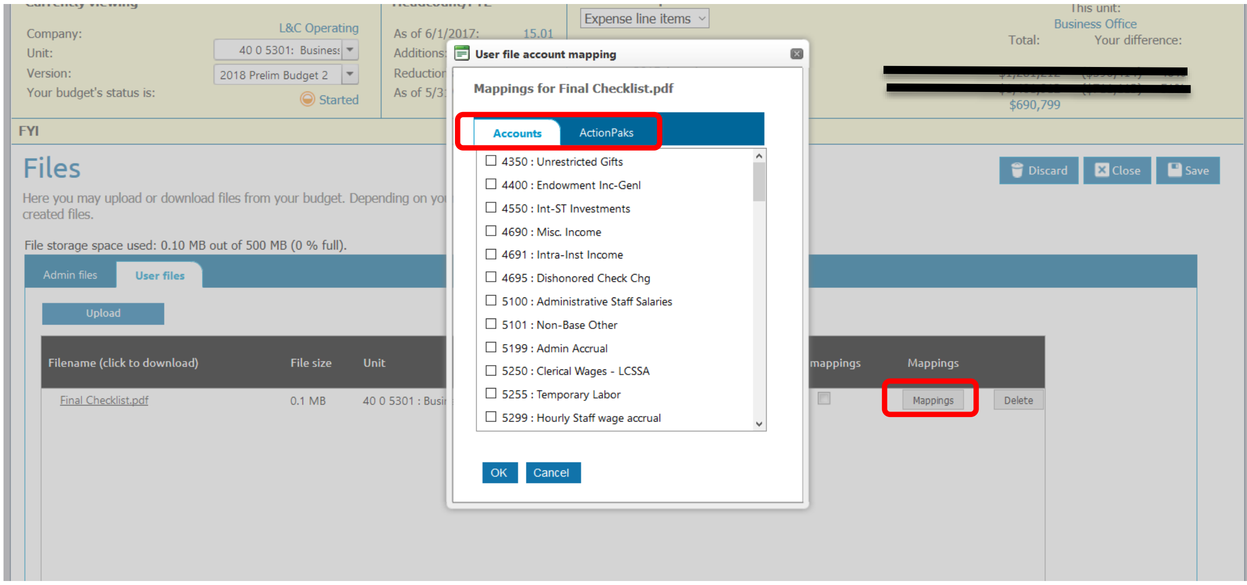
File size: BudgetPak has limited file storage so please **do not upload large data files**. File types accepted: .xlsx, .docx, .pptx, .pdf, .jpeg, etc. Click on a filename to download it.

Unit: Specific unit and version the user file was uploaded to.

User: The user who uploaded the user file. Last name, First name (Username)

Rolldown to child units: If you want this user file to appear in all units that are children of the file's unit.

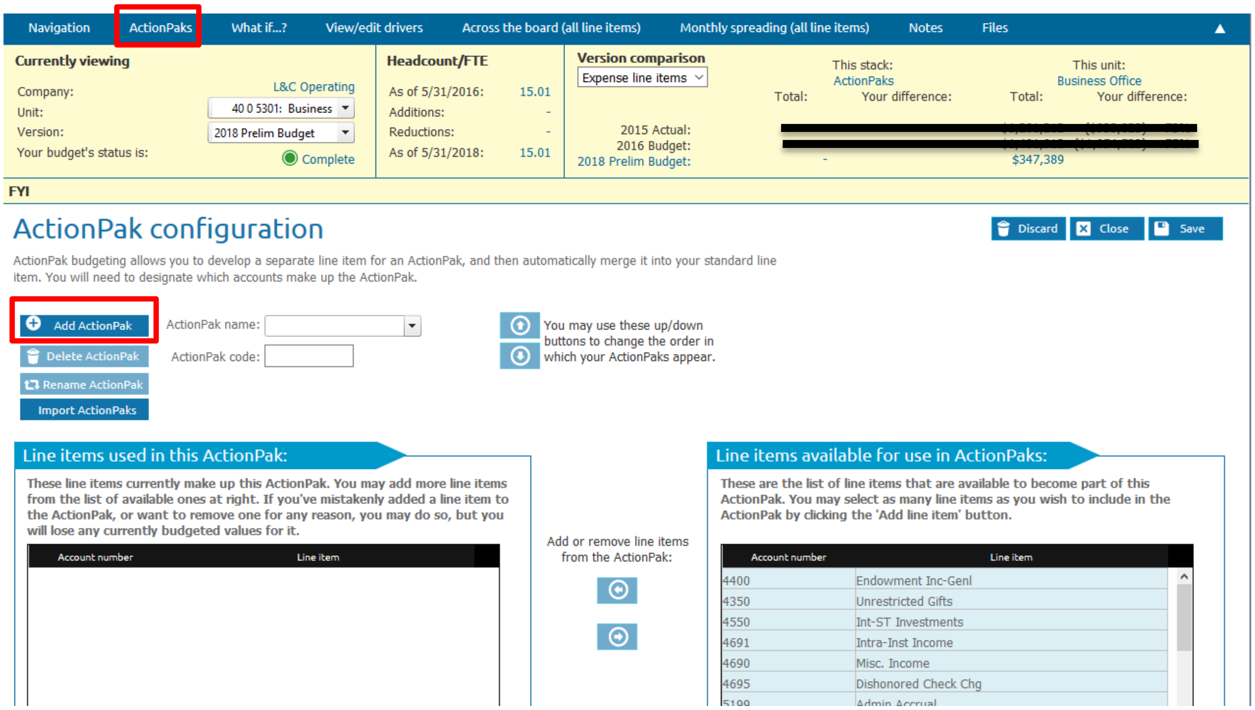
a. Upload the supporting document, then click "Save".
b. If you want the file to be mapped to different accounts and/or ActionPaks, click "Mappings"
c. Select the accounts for the file you wish to be mapped to.


Company:
L&C Operating
Unit:
40 0 5301: Busines:
Version:
2018 Prelim Budget 2
Your budget's status is:
Started
As of 6/1/2017:
15.01
Additions
Reduction
As of 5/3
Expense line items
This unit:
Business Office
Total:
Your difference:
[redacted]
$690,799
FYI
Files
Here you may upload or download files from your budget. Depending on yo
created files.
File storage space used: 0.10 MB out of 500 MB (0 % full).
Admin files
User files
Upload
Filename (click to download)
File size
Unit
mappings
Mappings
Final Checklist.pdf
0.1 MB
40 0 5301 : Busi
Mappings
Delete
Discard
Close
Save
User file account mapping
Mappings for Final Checklist.pdf
Accounts
ActionPaks
4350 : Unrestricted Gifts
4400 : Endowment Inc-Genl
4550 : Int-ST Investments
4690 : Misc. Income
4691 : Intra-Inst Income
4695 : Dishonored Check Chg
5100 : Administrative Staff Salaries
5101 : Non-Base Other
5199 : Admin Accrual
5250 : Clerical Wages - LCSSA
5255 : Temporary Labor
5299 : Hourly Staff wage accrual
OK
Cancel

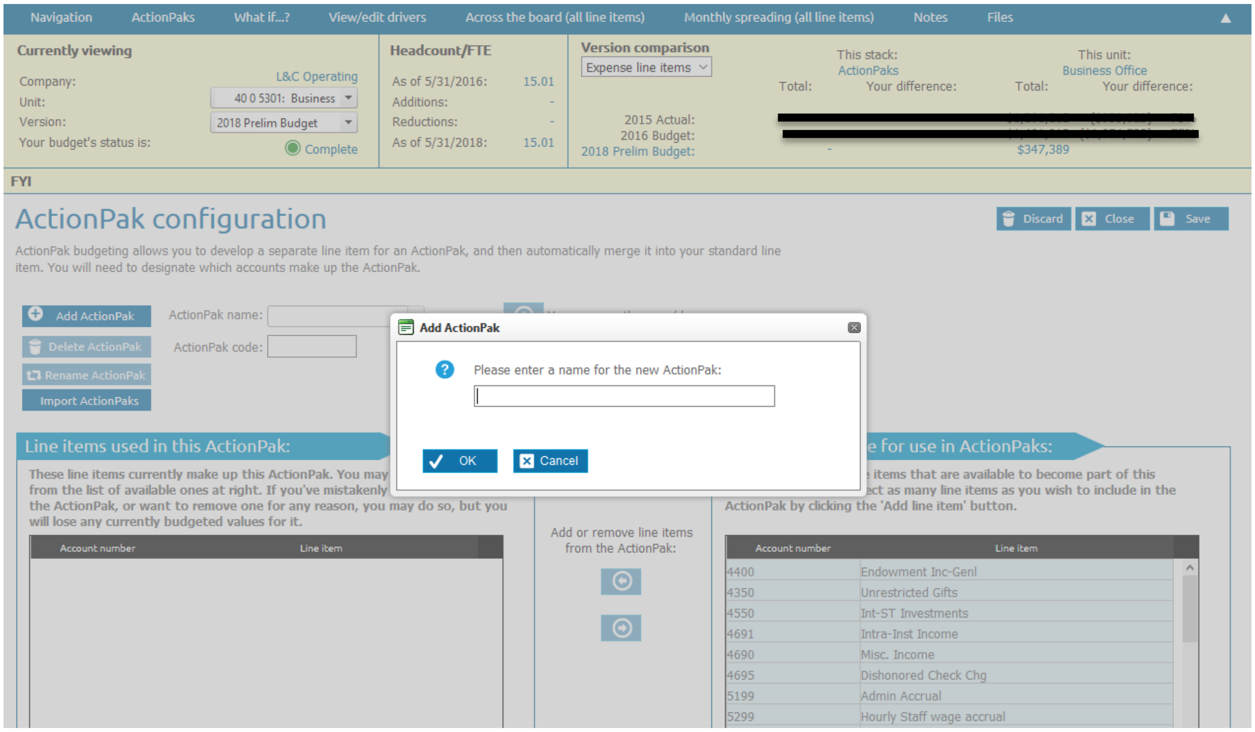
Appendix 2 - ActionPaks – Budgeting for Specific Projects

ActionPaks are an optional feature that you can use to budget for unit-specific initiatives, projects, or programs. Any amount entered into an ActionPak is **additive** to the amount already entered for that line item in your base budget. ActionPaks must have a note or attachment describing the initiative.

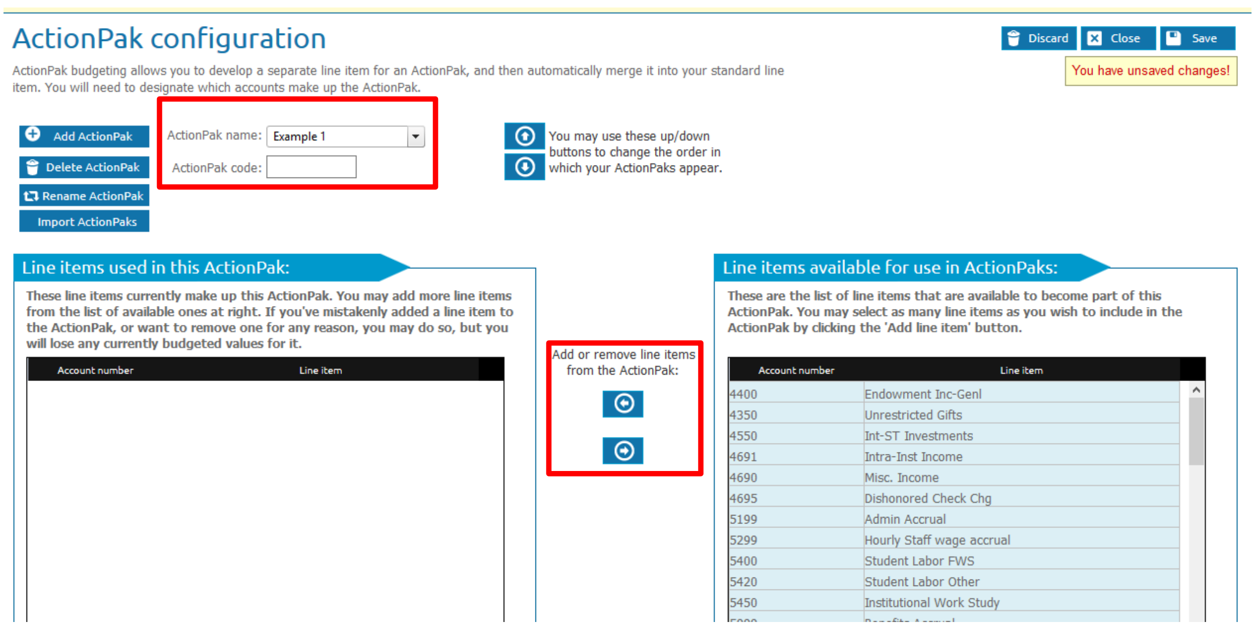
1. Click **ActionPaks** in the blue navigation menu at the top of your screen. ActionPaks can be entered at any point in the budget entry process detailed in the section above.



2. Click the **Add ActionPak** button and enter a name for this ActionPak, and Click **OK**.

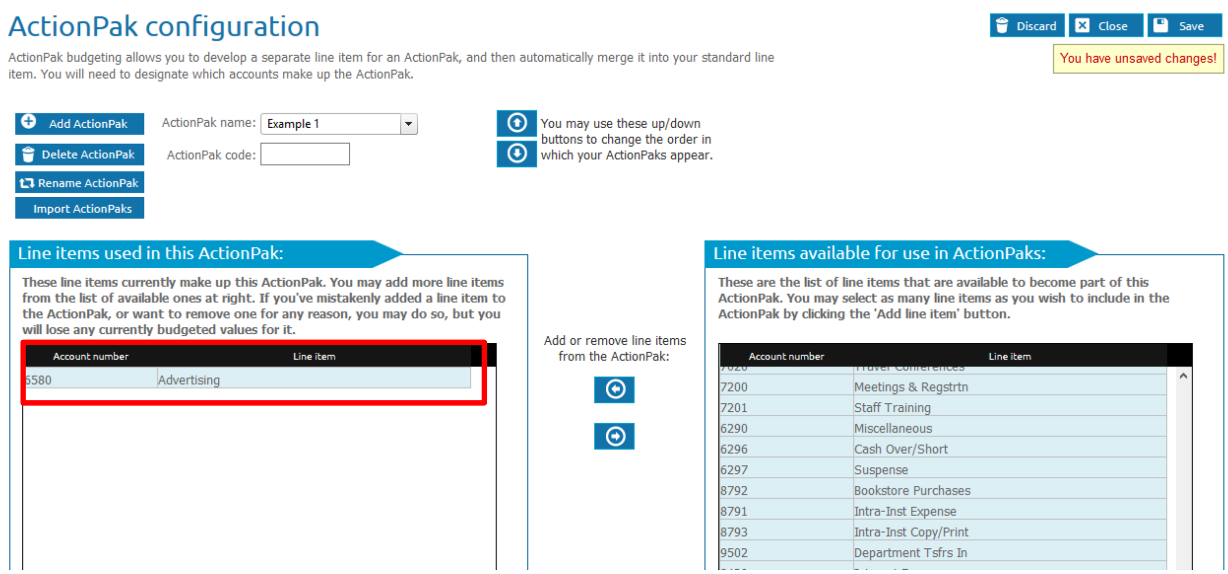


3. Enter a code for this ActionPak. The code is required and needs to be a unique identifier within the unit.

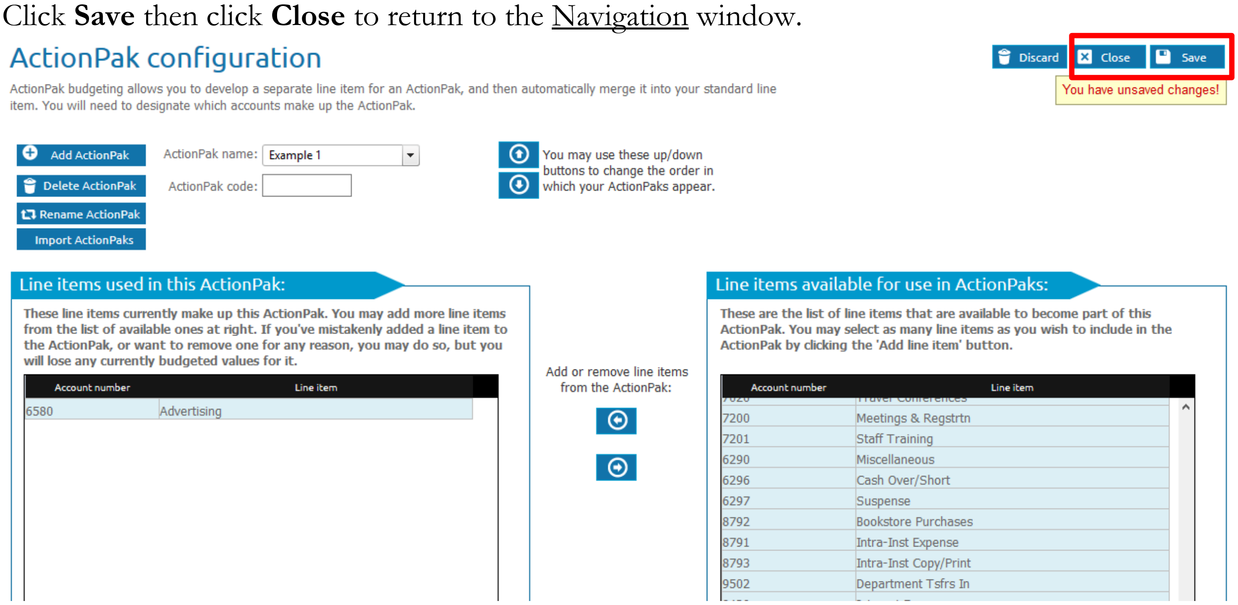


4. Map line items (accounts) to the ActionPak by selecting the **line item in the Line items available for use in ActionPaks** box on the right of the window and clicking the left arrow

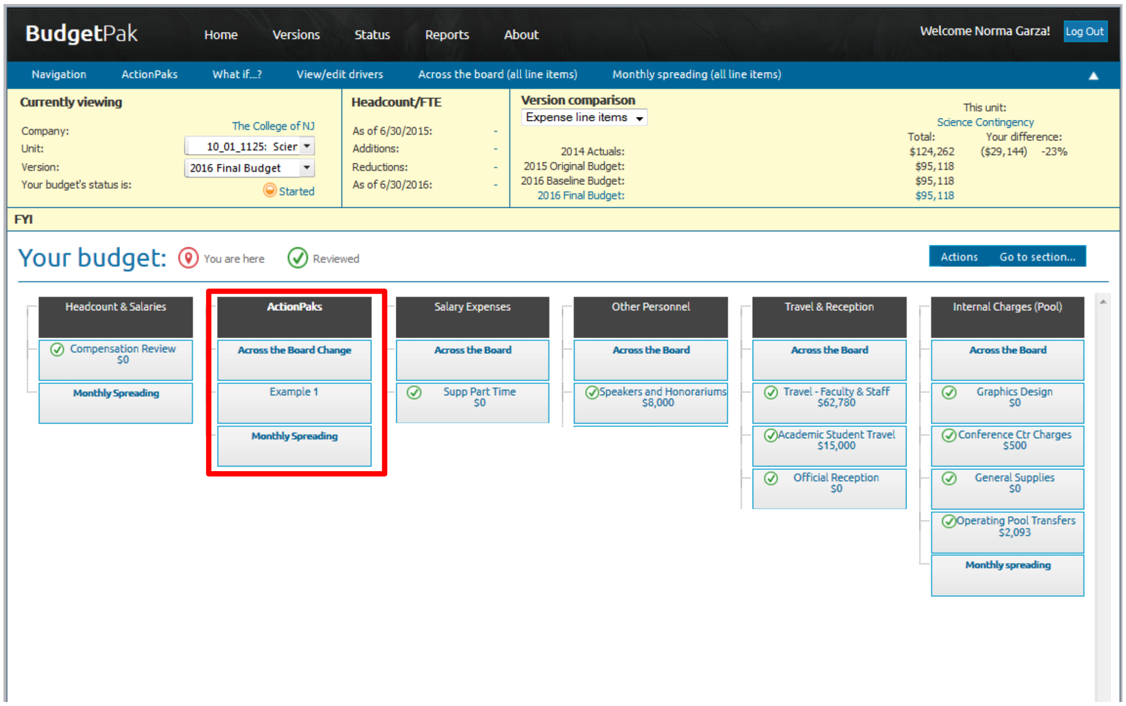
to add it to the ActionPak. The accounts selected will appear in the **Line items used in this ActionPak** box on the left of the window. Map all accounts that will be needed for the ActionPak.



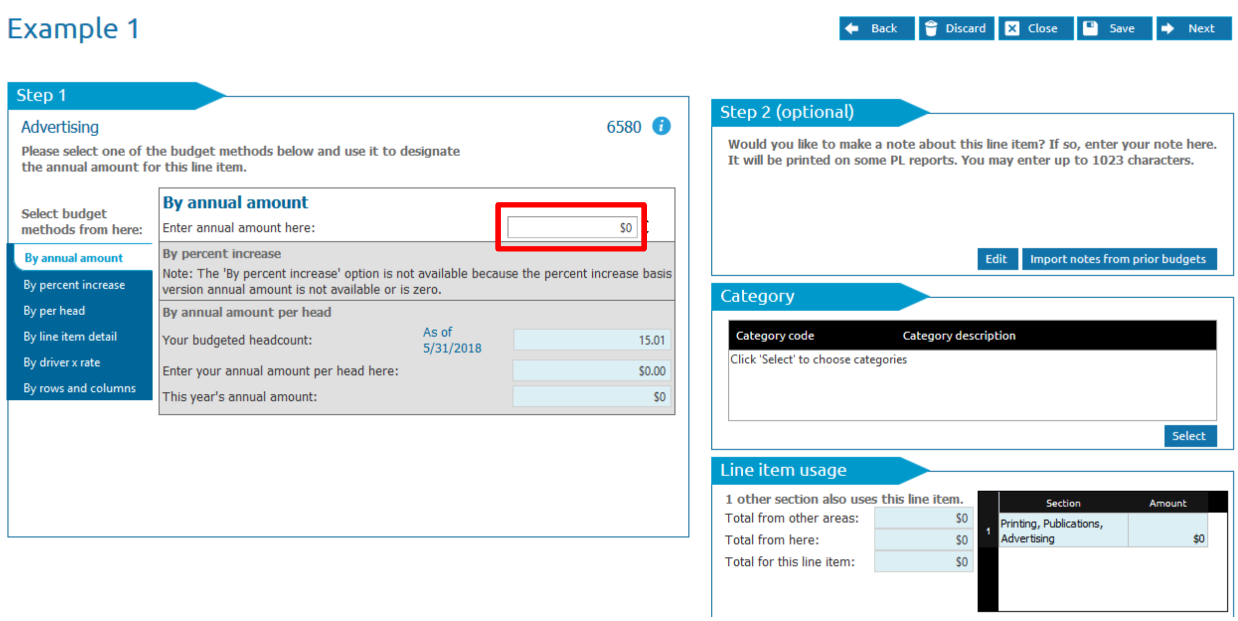
5. Click **Save** then click **Close** to return to the Navigation window.



6. A new stack called **ActionPaks** will appear in your Navigation window. The section underneath will contain the name of your ActionPak.



7. Click on the new section for the ActionPak and the ActionPak window will appear. Enter the requested amount in the By annual amount box in Step 1. *Enter the description of the initiative in the step 2 box. This is required. The description must contain details of the request sufficient to assess the need for the funding requested.[Step 2 appears to be optional in this screen shot?]*



8. Continue to add additional ActionPaks as needed.

NOTE: Any line item which you used in an ActionPak will now appear as an additional line item within the general budget. . When you click on a section in your Navigation window that includes an ActionPak, you will see the general budget value, the ActionPak value and the total value for that line item.

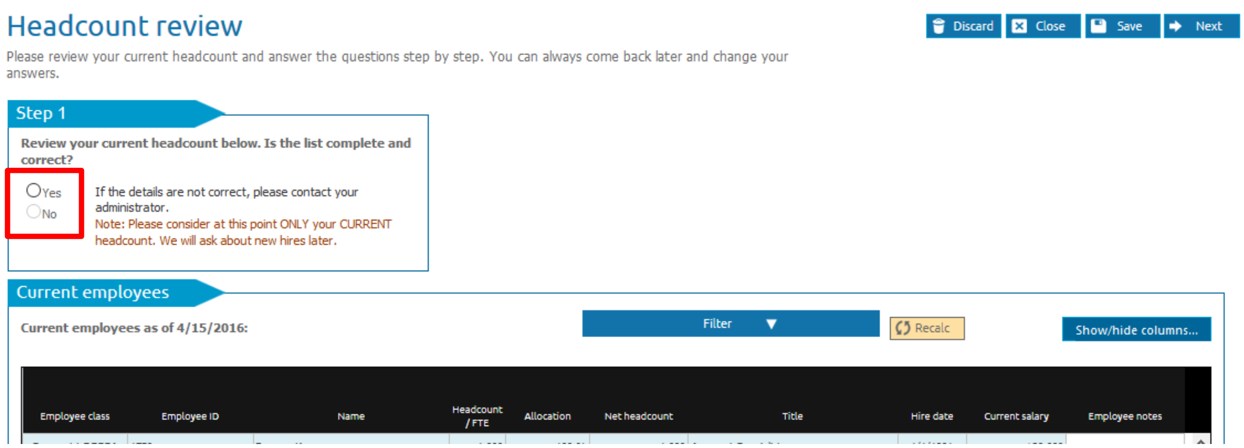
- All P&L reports will display the total value for each line item.
- Run an ActionPak report to see the individual ActionPaks with their associated line items, amounts and notes.
    - In Advanced Reporting, Step 1, choose ActionPaks by Account or ActionPaks by Units box.
- Run the My Budget Decisions report to see the ActionPaks listed along with the final budget.

Appendix 3 - Reviewing Headcount & Salaries

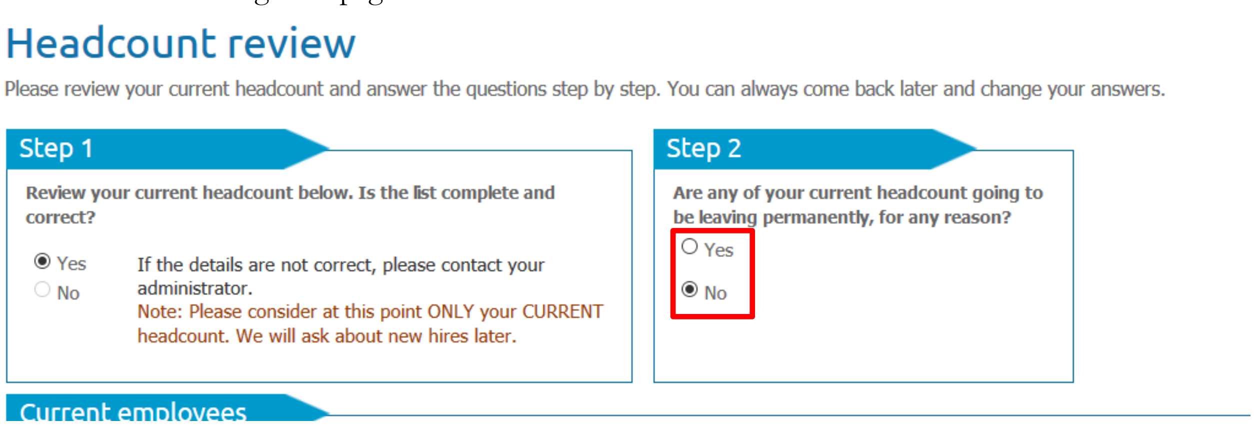
If you have Headcount (employees) in your unit and if you are authorized to review Headcount & Salaries, you will see a stack called **Headcount & Salaries** in your Navigation window.

Click the top section **Headcount Review** to make sure that you have the correct list of employees for your unit.

NOTE: In this section, you are verifying the current headcount and salaries. The information has been preloaded by the BudgetPak administrator.

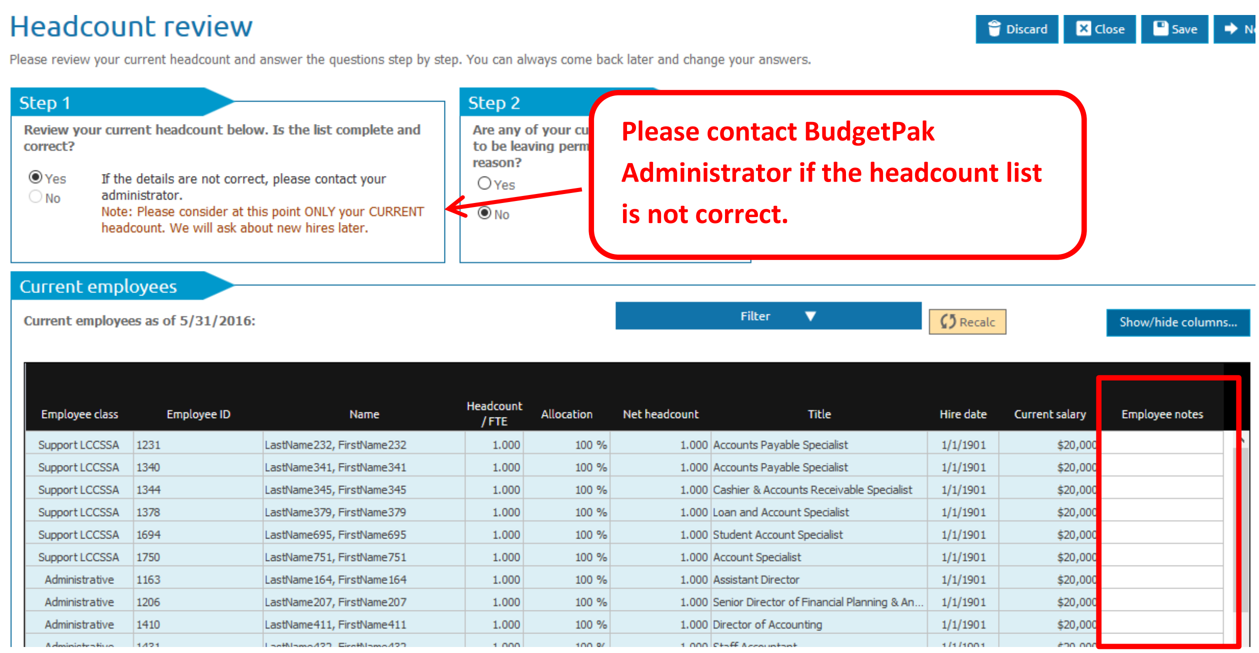


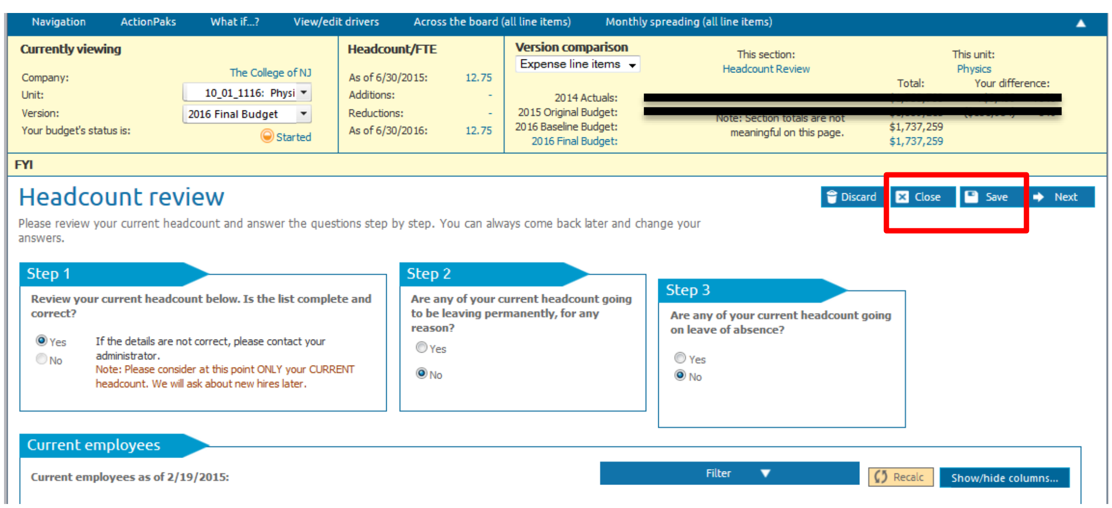
c. Answer the question on **Step 2** and then click **Next** to take you to the next section in order. Or, you can click **Save** to save your entries then **Close** to return to the Navigation page.



Lewis & Clark College

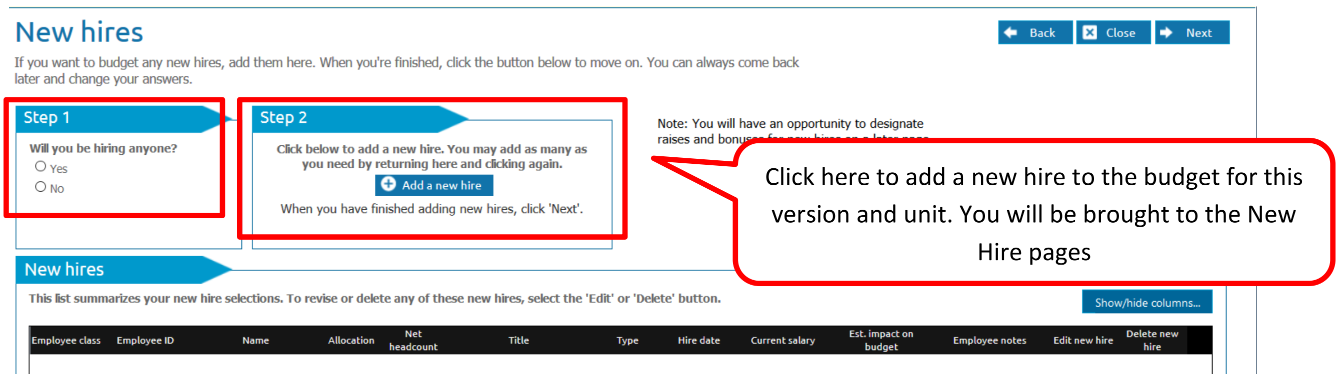
You can display additional columns or hide current columns by clicking the **Show/hide columns…** button. You can also make note in the Employee Notes column if needed.





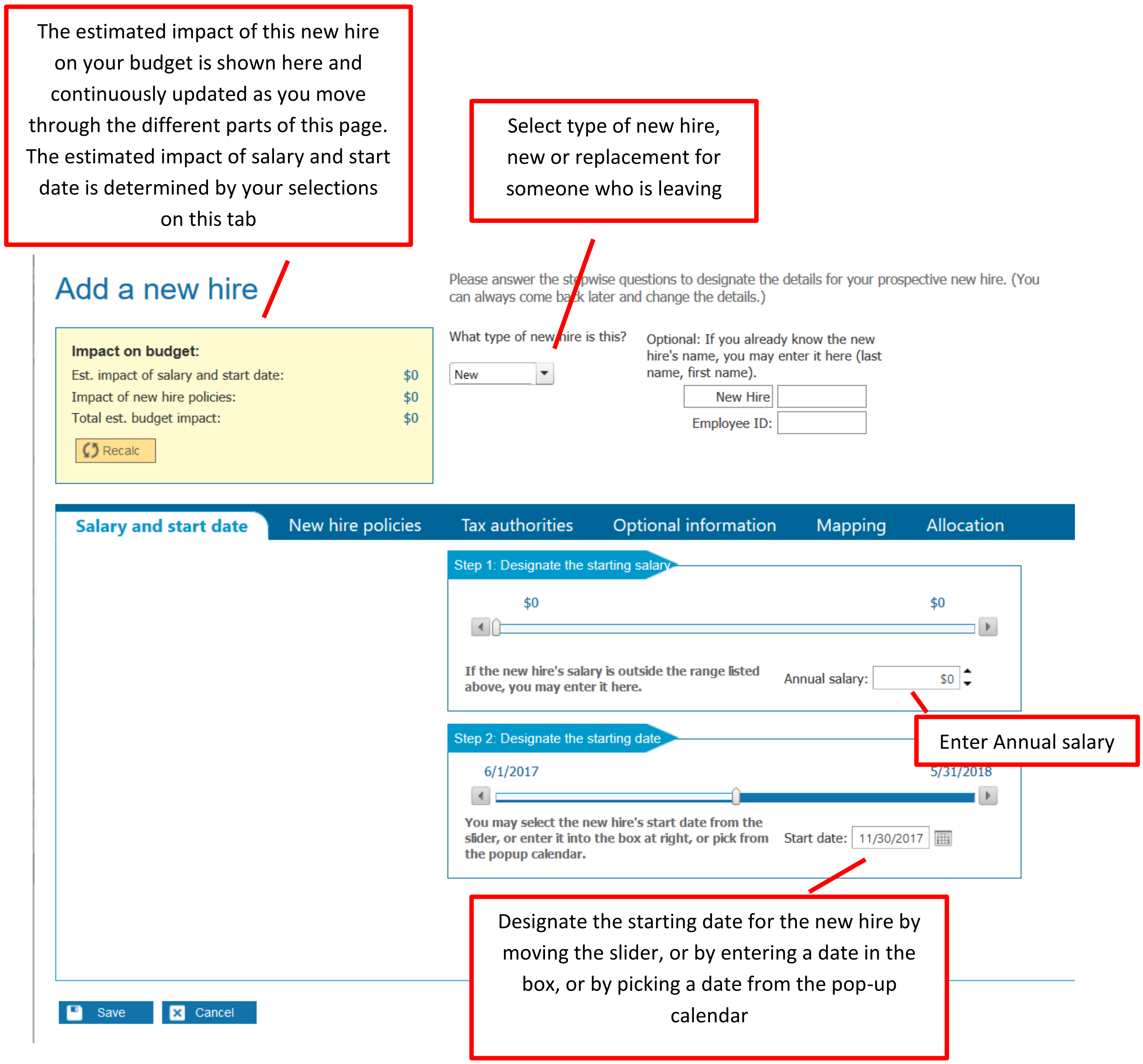
2. New Hires: A tour of the New Hires Pages

   a. Answer the question in **Step 1**. If you respond Yes, then you simply move on to **Step 2**. If you respond No, then you may **Move on** Click on **Save** and **Close** [Next, Close?]



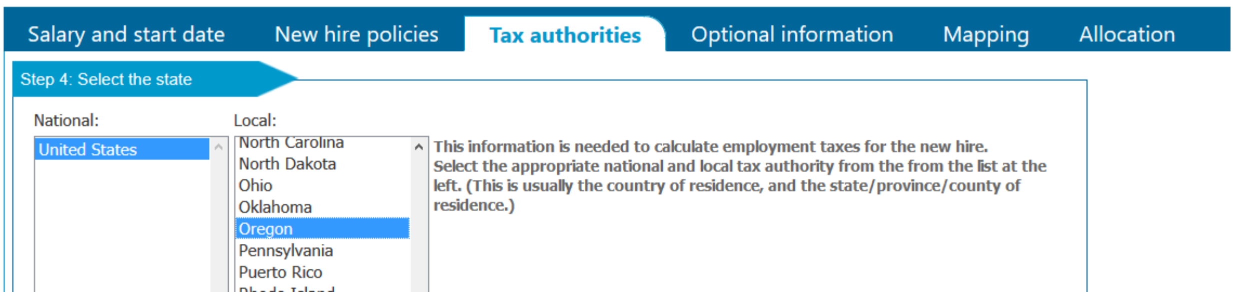
b. Add a New Hire

i. Salary and start date



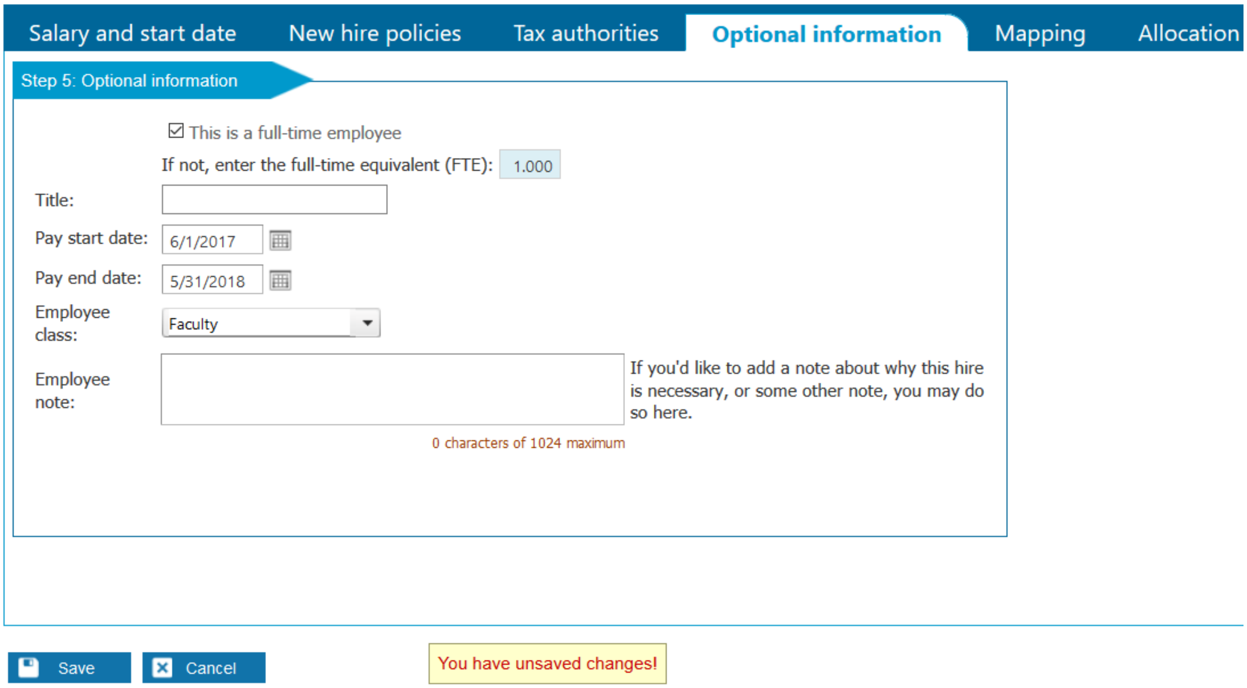
ii. Tax authorities

Each employee is subject to national and local employment taxes (such as social security and SUI). Select the appropriate national and local tax authorities for this new hire.



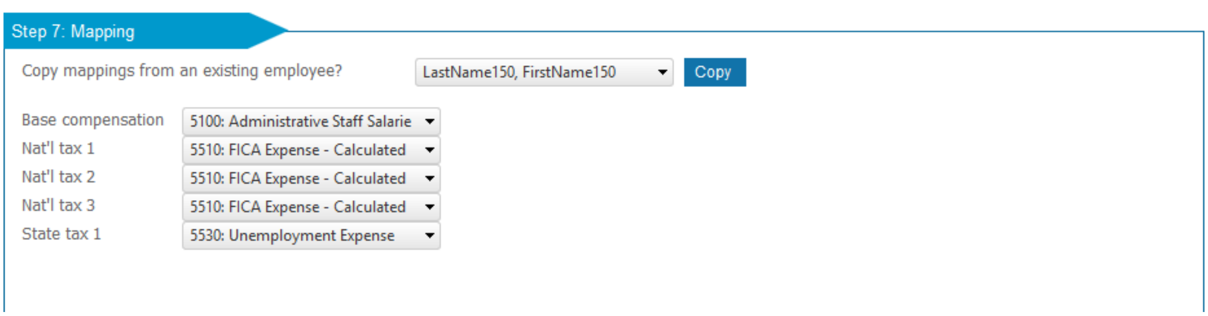
iii. Optional information

1) Enter the title for the new hire if you know it. It will display on page and on headcount reports.
2) If this new hire is not full-time, uncheck the box and enter the full time equivalent. NOTE: Be sure to always designate the *actual* annual salary for a new hire. For example, if the full time salary for a full time employee would be $50,000, but you are designating an FTE of 0.5, then designate a salary of $25,000.
3) Select the employee class for the new hire.
4) Enter a note to explain the purpose of the new hire.



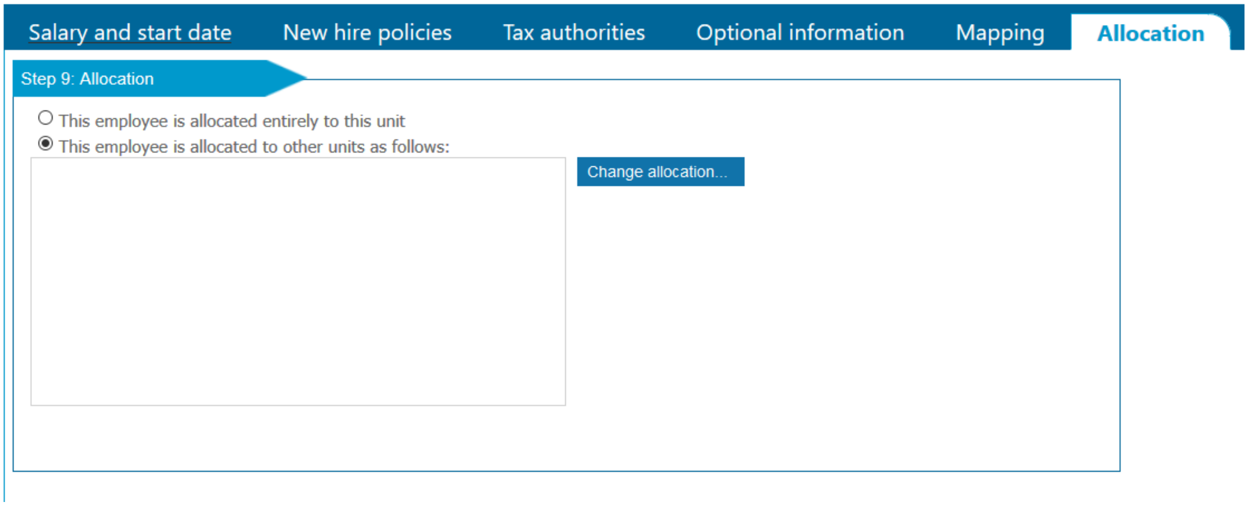
iv. Mapping

If you would like to copy mappings for taxes and benefits, select an existing employee from the drop-down menu.

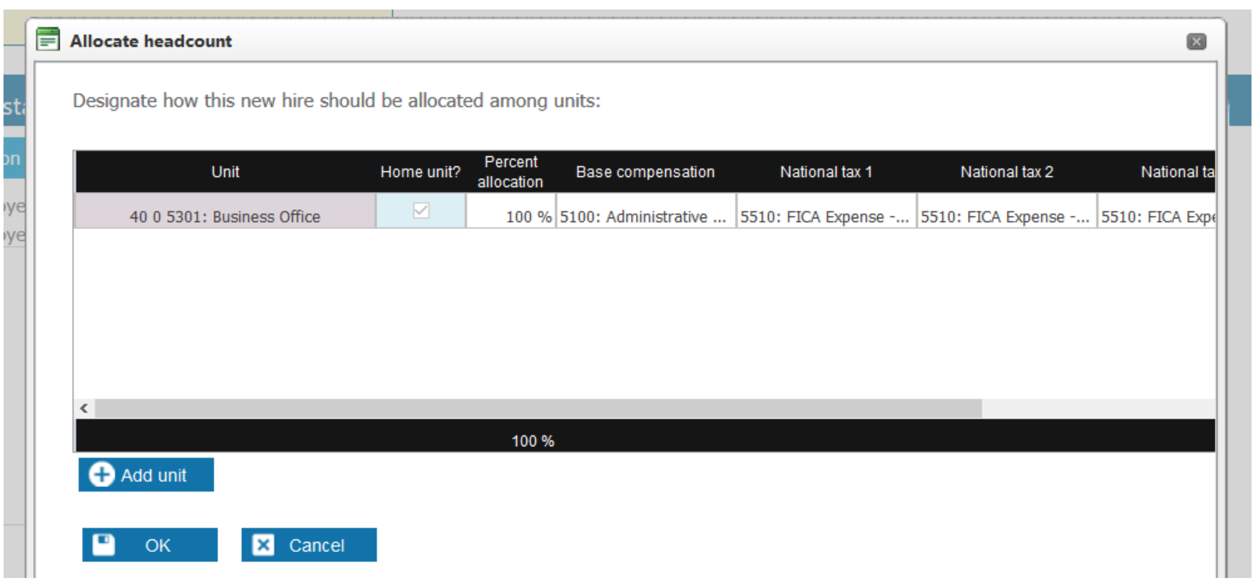


v. Allocation

1. Select if this new hire is allocated entirely to this unit or to other units



vi. If this employee is allocated to other units, click **Change allocation** and **Add unit** and change allocation information if needed. NOTE: you can make changes to all the white cells

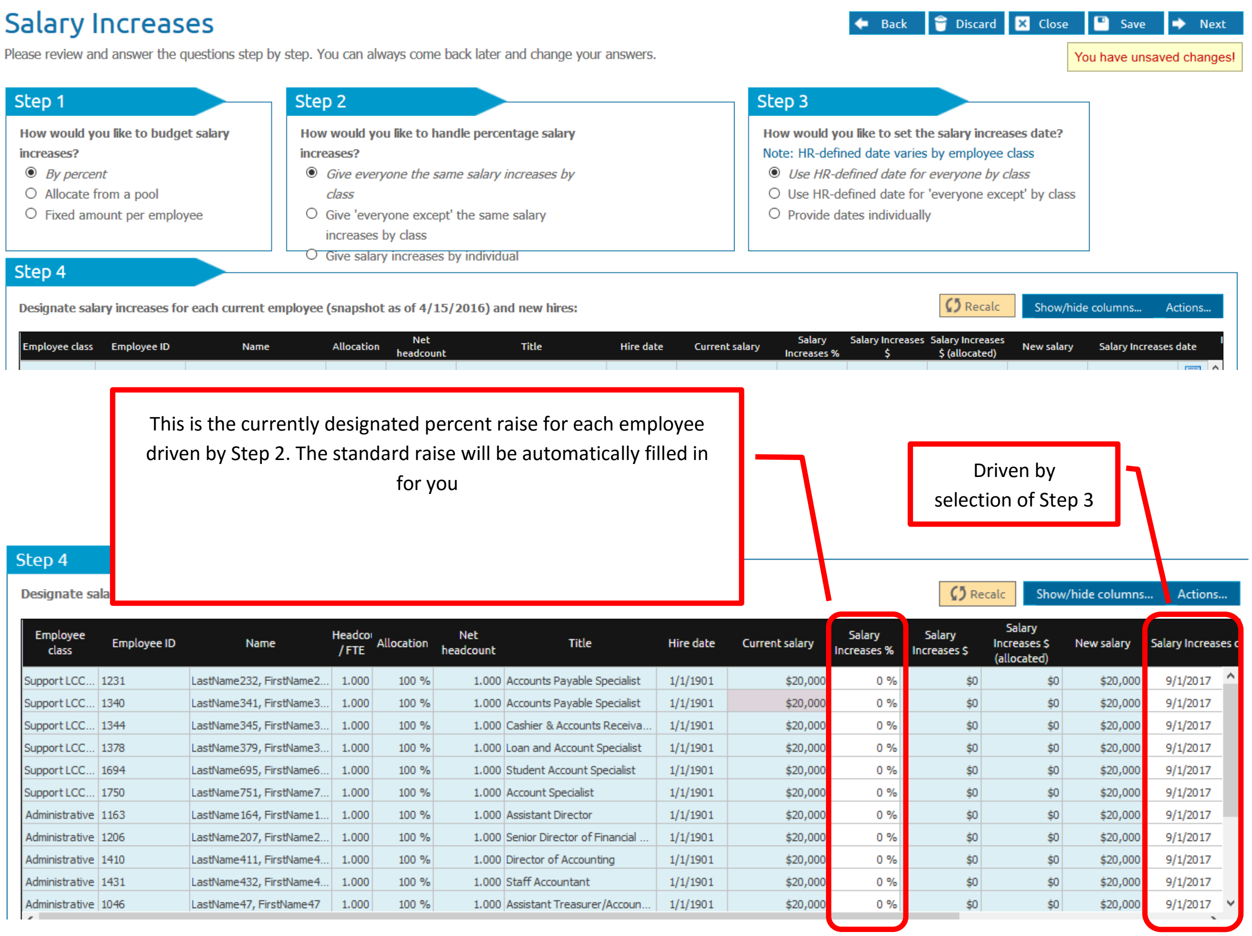


3. Salary Increases

   a. Step 1, pick the method you would want to use to give raises. Lewis & Clark uses **By percent.**

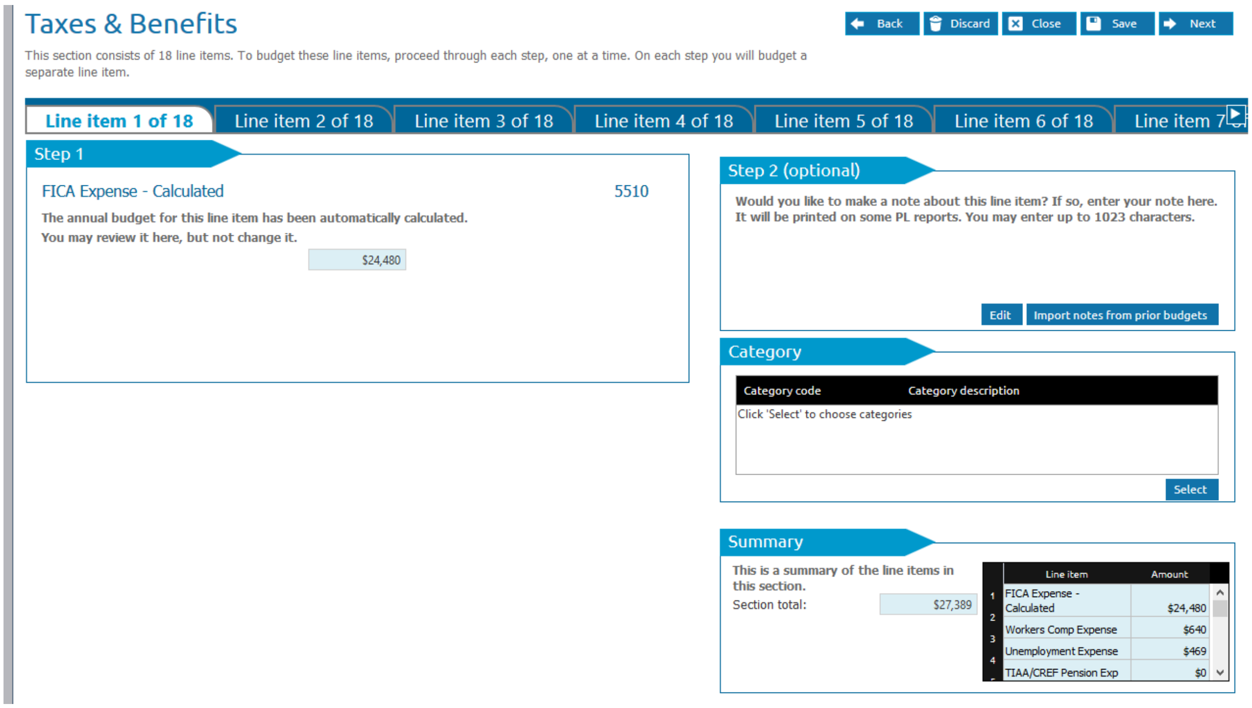
   b. Step 2, designate the scope of the standard raise, that is, to which set of employees it will be applied. Select **Give everyone the same salary increases by class**.

c. Step 3. Designate the scope of the standard raise date; that is, to which set of employees it will be applied. Select **Use HR-defined date for everyone by class**.



4. Review details in **Taxes & Benefits** section. No changes are necessary, taxes and benefits are centrally managed by the administrator. Click each tab to review account totals. Click **Close**.

   NOTE: Benefits for visiting and adjunct may need to be manually entered using account 5765.



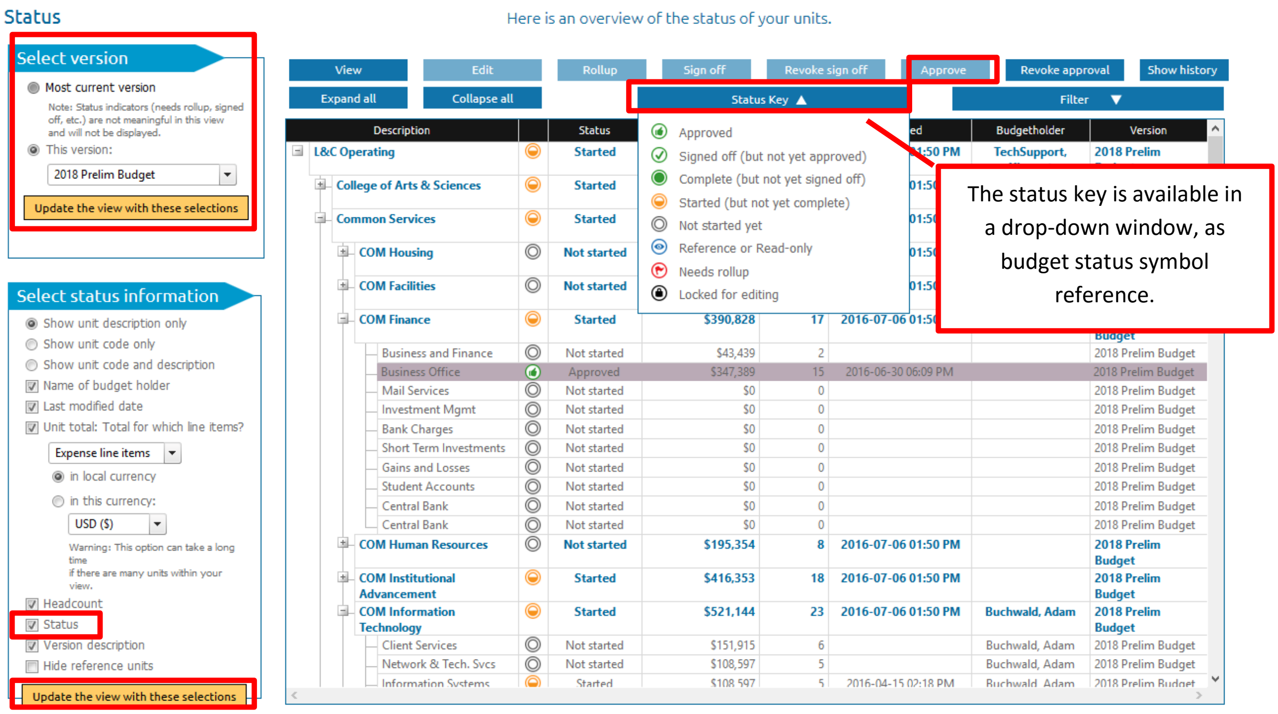
5. Review details in **Salaries & Wages** section. Click each tab to review account totals. Click **Close**.

Appendix 4 - Approving Budgets

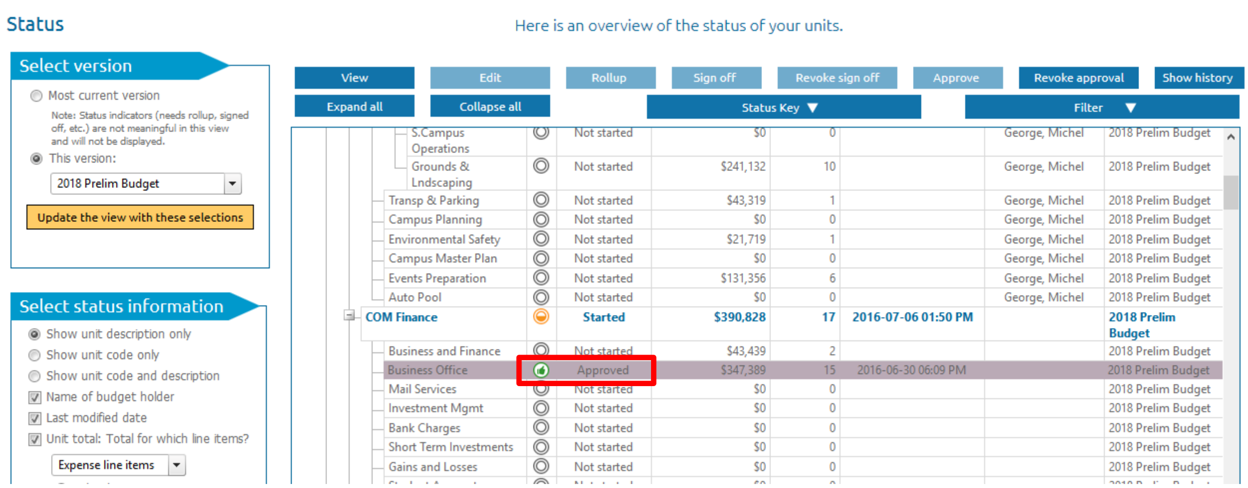
Approval Workflow

Approval Managers have the responsibility of approving the budget for each of their units, as well as the roll-up unit to which they are assigned.

1. On the toolbar at the top of the window, click **Status**. The unit Status window displays, showing the budget status for all departments for which you are responsible.
2. In the upper left Select Version panel of the Status window, verify that you are viewing the Budget version you want.
   - In the Select Status Information panel, make sure that status box is checked.
   - Click update view with these selections.



3. Click on the row containing the first unit that contains the "signed-off" icon, which is a green checkmark inside a green circle. When you select the unit, the row will be highlighted in blue.)
4. Click the **Approve** button (located above list of units). Note that the icon changes to a green thumbs-up and the status changes to 'Approved.' This indicates that the budget for that unit is now approved by you.



5. Repeat Steps 3 and 4 until all of the units for which you are responsible have been approved.
6. You must also consolidate parent units for which you are responsible. Click on the relevant unit, click the **Rollup** button to consolidate all the budgets in that unit, then click the **Sign-off** button

7. Once you have signed-off, your budgets can be reviewed and rolled up by the next level of Approval Managers.