Enterprise Financial System (EFS)

SPA Rebudgeting
Grants Management User Network
May 8, 2008

Objectives

- Summary of Current Process
- Summary of the Process Change
- Overview of Business Process Execution Language (BPEL) Process
- Overview for Establishing New Budget Categories
- Q & A
Current Process

- NBUD Process
  - Preparer initiates NBUD request & routes to CA
  - CA reviews & approves/forwards to SPA
  - Rebudgeting between existing objects
  - Establishing new objects

Process Change

- Preparer initiates requests using BPEL form
- Preparer routes BPEL form to CA
- CA will enter budget changes into PeopleSoft
1. User (Initiator) logs into BPEL
2. User (Initiator) is presented with personal task list
3. User indicates the type of task that will be originated.
4. User receives positive confirmation that task has been created
5. User (Initiator) goes back to personal task list to enter rebudget form
6. Blank form opens
7. User (Initiator) searches for project budget
8. User selects appropriate budget to update from search results
9. Form is populated with budget information
10. User (initiator) updates budget adjustment info and requestor info
10. (Cont.) User (initiator) updates budget adjustment info and requestor info

<table>
<thead>
<tr>
<th>Budget Category</th>
<th>Description</th>
<th>Current Budget</th>
<th>Adjustment Amount</th>
<th>Revised Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>FACADM</td>
<td>Facility and Admin Costs</td>
<td>743.00</td>
<td>0.00</td>
<td>743.00</td>
</tr>
<tr>
<td>GEN_OP_SERVICES</td>
<td>General Operating Service</td>
<td>1,000.00</td>
<td>-50.00</td>
<td>950.00</td>
</tr>
<tr>
<td>GEN_OP_SUPPLIES</td>
<td>General Operating Supplies</td>
<td>500.00</td>
<td>50.00</td>
<td>550.00</td>
</tr>
</tbody>
</table>

Budget:
- Sponsor Direct: 1,500.00
- Sponsor FA: 743.00
- Total Sponsor: 2,243.00

Justification for Rebudget: Funding rebudgeting process

Comments:

Add Comment

Save Request

Short History:
- Task Created
- State Assigned
- Outcome
- Updated By: cdoyle
- Updated Date: Jan 11, 2008 9:05 AM
11. User (Initiator) saves updated document
12. User (Initiator) ‘Submits’ to Certified Approver
13. User (Initiator) task list has been updated. Task no longer shows.
14. User (CertApp) logs into BPEL
15. User (CertApp) sees task in personal task list
16. User (CertApp) changes task action to ‘Claim.’ (This task is routed to the Certified Approver and also the Certified Approver Alternate simultaneously. This is why it must be claimed. Claiming will remove the task from the other’s list.)
17. User (CertApp) changes task action to 'Approve' or 'Reject.' (Reject will route task back to originator)
18. Task is showing as 'Completed' in the status. At this point the CertApp will go to the Project Budget page in PeopleSoft.
19. Scroll over
20. Hit the "+" button to add a budget row.
21. Fill in the appropriate chart fields for budget row. Repeat steps for second line of adjustment.
New Budget Categories

- SPA responsible for rebudgeting across multiple projects (parent/child)
- SPA responsible for establishing new budget categories
- CAs will forward these requests to SPA
- SPA to work with CAAC to develop an electronic request form

What are Your Questions?

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