### Business Processes

1. **1. BC Start Up**  
   - Start

2. **2. Unit Level Budgeting**
   - February
   - Budgets to Unit Level

3. **3. Dept Level Budgeting**
   - March
   - SIP Eligibility Date

4. **4. Institutional Validation and Prepare for Trustee Approval**
   - April
   - Budgets to Institution Level

5. **5. Finalize and Implement Budgets**
   - May
   - Trustee Budgets to GL

   - June
   - Base Budgets to GL

### Application Processes

- **Fiscal Year Maker (Initial Run)** - Creates new FY COA from current FY
- **GENESIS** – Creates BC docs for new FY from current FY budgets and positions
- **Load LTIP Revenue** – from DFA (Long Term Investment Pool or endowment payout)
- **Suspend Base Budget Adjustments for current FY**
- **Begin semi-weekly runs of Fiscal Year Maker in Add Mode** – adds new current-FY COA items to new FY COA
- **Begin nightly runs of BC Update** – updates BC docs with changes in current-year budgets and positions
- **Entry of Pooled SIP at Unit Level**
- **Repeated push down to and pull up from Dept Level**
- **SIP Roster Exports**
- **Loading of budget requests via Request Import Tool**
- **Manual updates to budget requests via edocs**
- **Trustee Budget to GL**
- **Collect and validate finalized SIP from units**
- **Send finalized SIP to HR**
- **Load SIP to Budgets (removing pooled entry)**
- **Make final changes to budgets within Fund Groups (?)**
- **End semi-weekly FY Maker runs (?)**
- **End nightly BC Update runs (?)**
- **Load finalized budgets to GL**
- **Load distribution changes to HR**
- **Begin Budget Adjustments via GL (?)**
- **Resume Base Budget Adjustments for current FY (?)**
Budget Construction Application Process

1. Fiscal Year Maker (Initial once & Add mode semi-weekly)

2. Updates from HR Application (NRT & nightly)

Current Picture
- PS Position
- Position/Job Distribution (CSF)

3. Genesis (A few times before Push Down to C Level)

Overrides
- Pos/Job Dist
- BC Org Rpt
- Acct Rpt to

Maint edocs

4. BC Update (nightly)

5. BC Selection

6. Budget Request Import

Next FY Budget Requests
- Budget Header (Acct)
- Revenues & Expenditures
- Appointment Funding

7. Budget Load to GL (Trustee & Base)

GL
- Current FY COA
- Current FY Budgets
- Next FY COA
- Next FY Budgets

Current Picture w/ Overrides
- BC Position
- BC Position/Job Distribution (CSF)
- Intended Incumbent

BC Processor

Add only

BC edocs

BC Salary Setting Screens

3/26/2012

Jolene Scaglione