

# BudgetPak User: Key Terms

**Across the Board (all line items):** Is an option to view all line items/accounts in a unit at once to make changes under one single view.

**ActionPaks:** Allow users to enter multiple account lines for their college/department specific priority requests/initiatives.

**Annual (Report View):** Is the report view by fiscal year.

**Approve Status:** Indicates the Budget Holder has reviewed and approved the budget request.

**Assistant Budgetholder:** Is the user (budget coordinator) who may run and view reports. They may also view and edit the Requested Budget Version.

**Base Unit:** Is the same as an org number. It is an organization/department at the lowest level that has its own budget and set of financial information. Information can only be changed at the base unit level.

**Budget Holder:** Is the user who is responsible for the college/department budget request and is the "owner" of the unit's budget. The budget holder is the only user that may sign off and approve the budget request.

**By Section (Report View):** This option allows users to select only desired section(s) (account categories) on a report.

**Complete:** Indicates the user/budget coordinator has completed and reviewed the budget request and is now ready for sign off and approval by Budget Holder.

**Discretionary (BudgetPak):** Is an account number that users may change its amount in the budget request version by adding or subtracting to the baseline.

**Enterprise Chart of Accounts:** Is a rollup of multiple sub accounts into a particular category. This option allows users to view information at a consolidated level.

**Line item:** Is a row of monthly data at the chart of account level.

**Local Company Chart of Accounts:** are accounts at the lowest level that have their own budget and financial information.

**Monthly (Report View):** Is the report view that is broken down by months.

**Monthly spreading:** Is the process of directing BudgetPak to take an annual figure from a budget and computing a monthly budget from the annual figure.

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**Needs Rollup:** Indicates some data in base unit(s) have changed and the rollup unit needs to be updated to reflect the changes from the base units.

**Non-discretionary (BudgetPak):** Is an account number that users **cannot** change its value.

**Quarterly (Report View):** Is the report view that is broken down by quarter(s).

**Revoke Approval:** Is when the Budget Holder of a unit cancels the approval of a unit. This action will set the base unit and rollup back to sign off status.

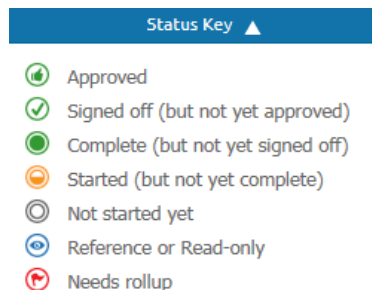
**Revoke Sign off:** Is when the Budget Holder of a unit cancels the sign off of a unit. This action will set the base unit and rollup back to complete status.

**Rollup Unit:** Is a consolidation of sub/base units.

**Sign off:** Indicates the budget request is complete and ready for approval by the Budget Holder.

**Standard Subtotal (Report View):** Is the report view that subtotals accounts by category.

**Status:** Shows the current budget request position of the Budget Development Process for each unit.



**Version:** Is a complete set of data for your University for one particular year, top to bottom; all line items, all units, all months. Each version consists of data for one fiscal year.

**Year-to-date (Report View):** Is the report view that is broken down from the beginning of the fiscal year to the day in which the report is created.