

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'.

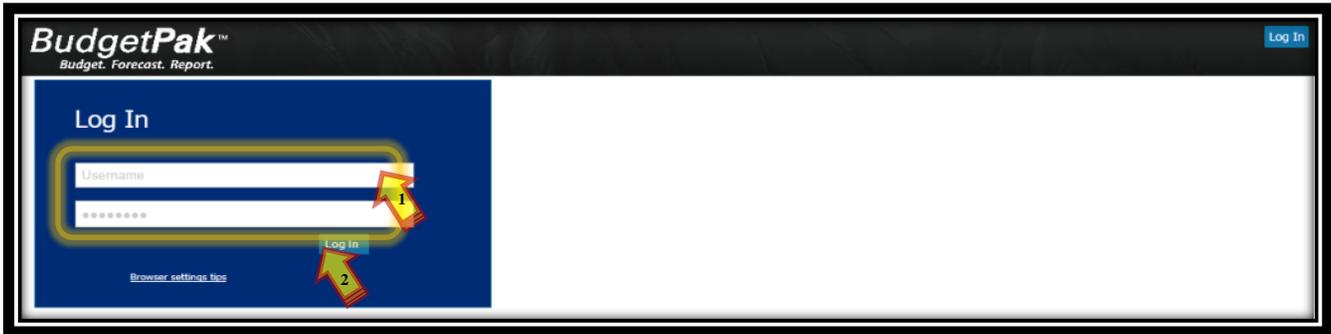
What to Expect: Step-by-Step

- 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>

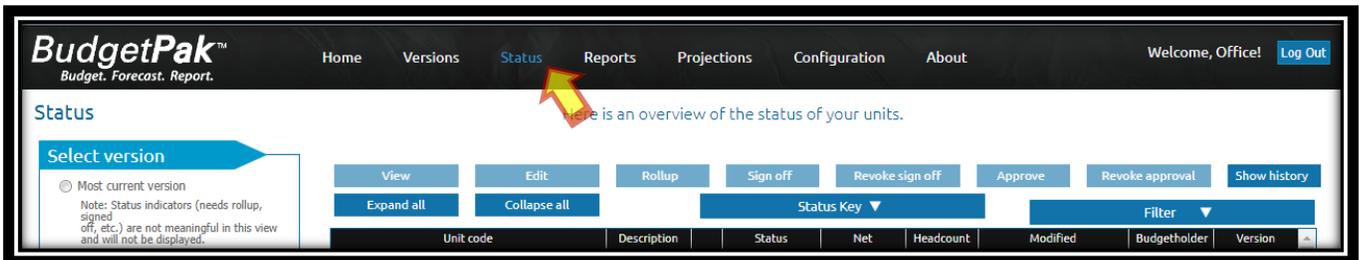
Step 2: Enter username and password. Click 'Log In'.



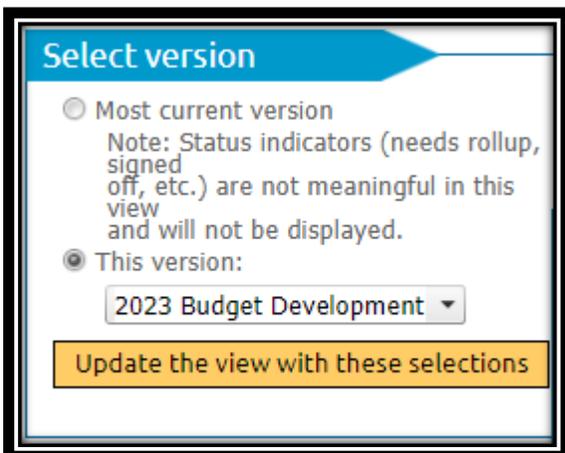
Note: For all Login issues, please contact the budget office at Budget@westernu.edu

Section I: Accessing BudgetPak Files

Step 1: Click 'Status'.

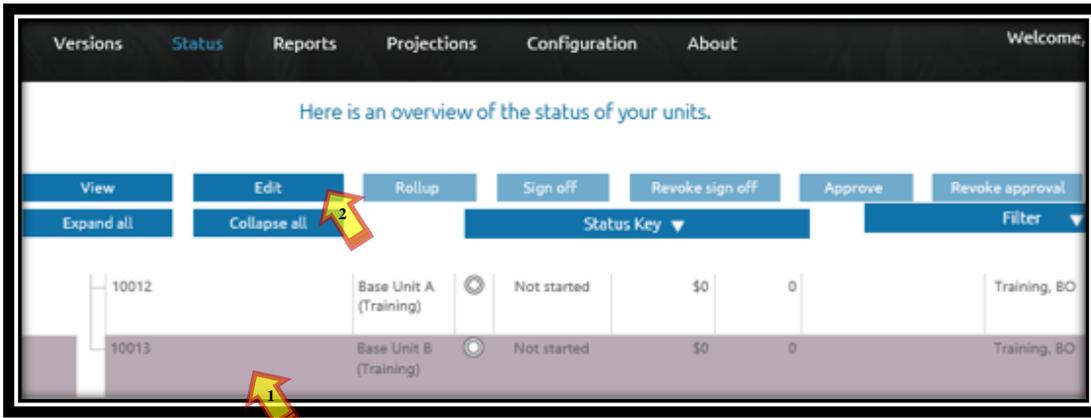


Step 2: Select '2023 Budget Development' in the 'Status' menu to the left. Then click 'Update the view with these selections'

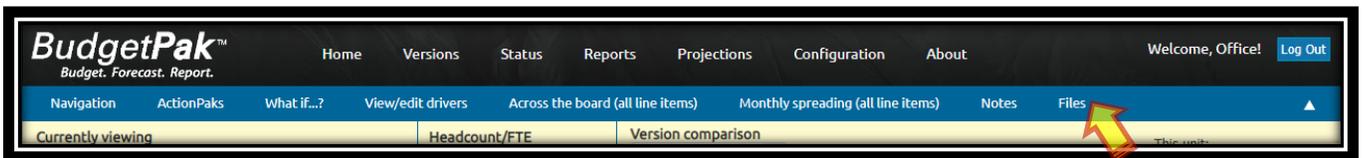


Section I: Accessing BudgetPak Files

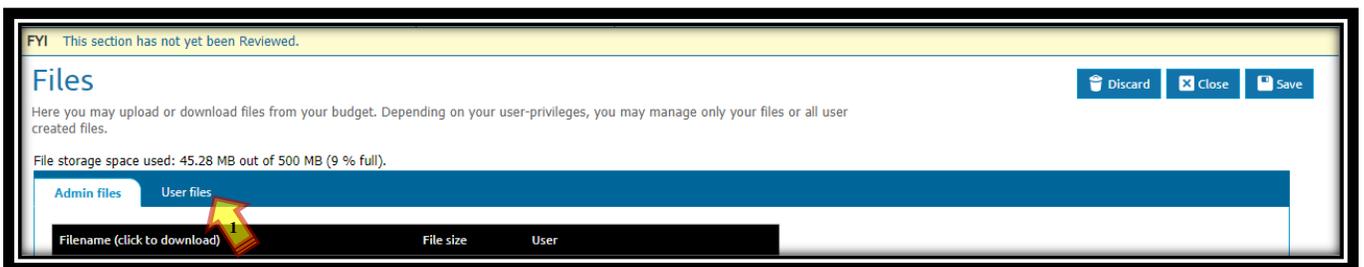
Step 3: Highlight the desired organization/department. Then click 'Edit'



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

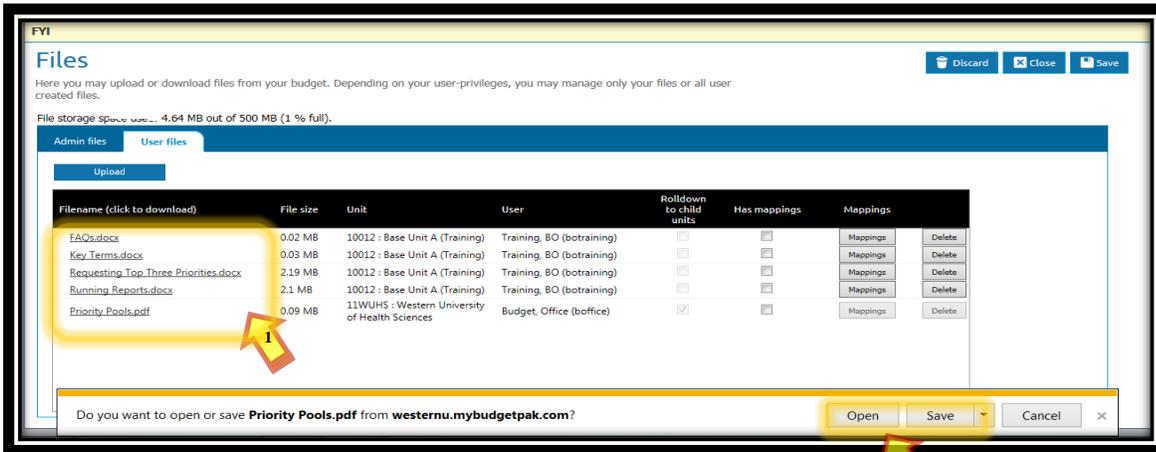


Step 5: Click on the 'User Files' tab.



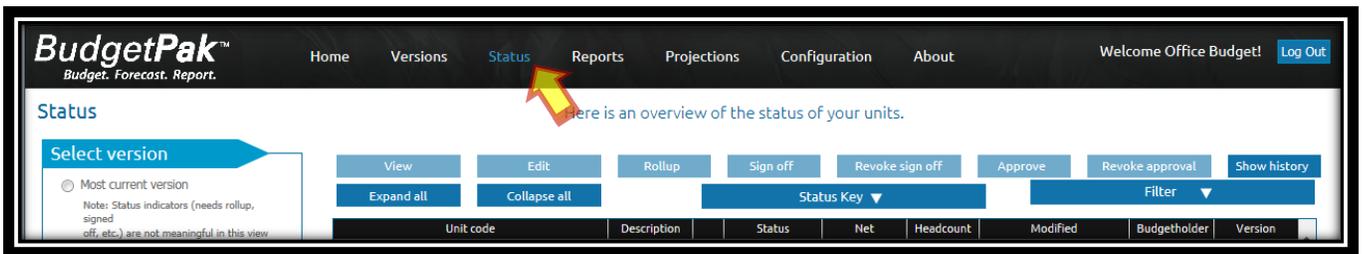
Section I: Accessing BudgetPak Files

Step 6: Click desired 'filename', then click 'Open' or 'Save'.

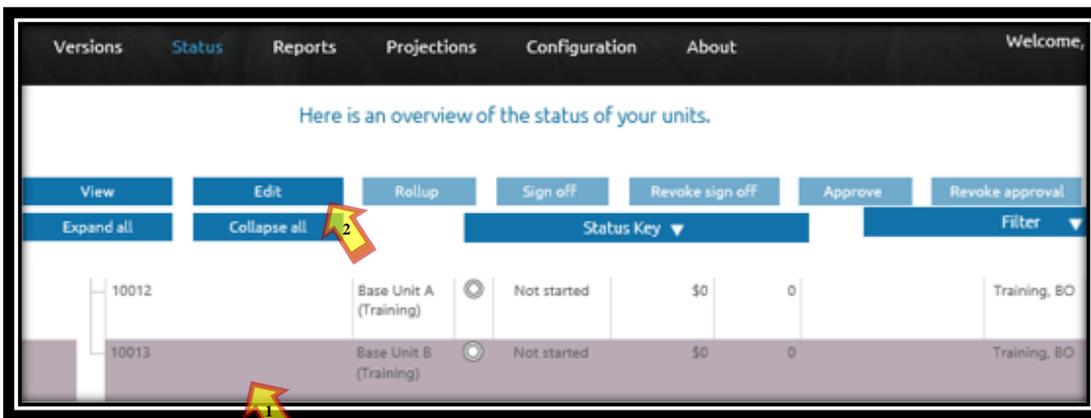


Section II: Creating ActionPaks for Top Three Priorities

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.

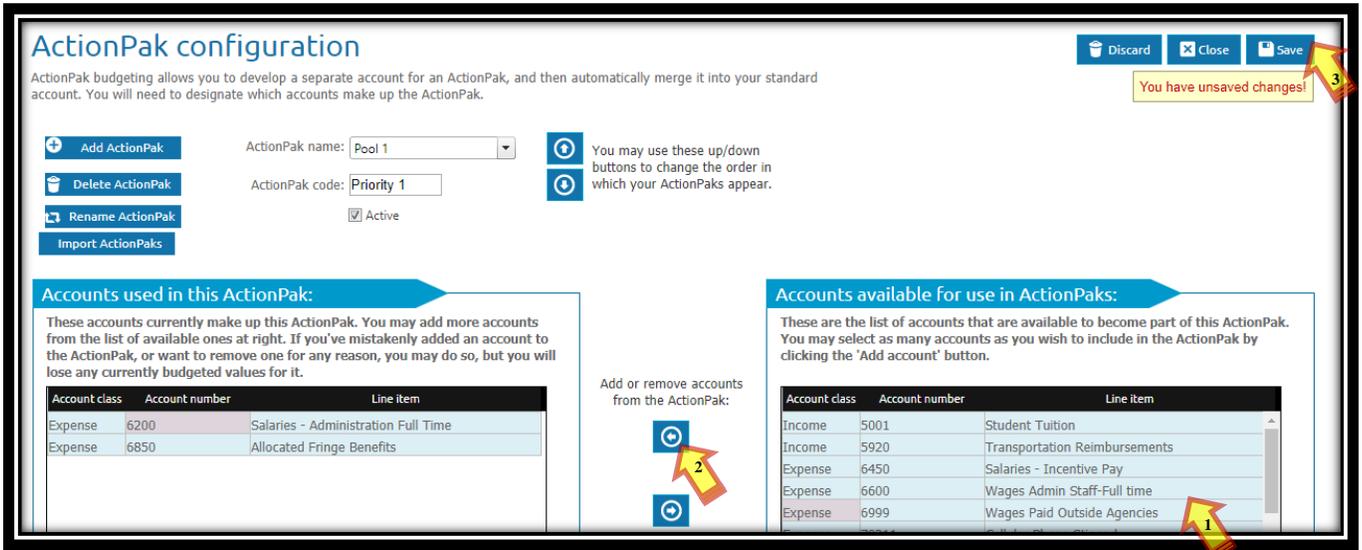
The screenshot shows the BudgetPak software interface. The top navigation bar includes 'Home', 'Dashboard', 'Versions', 'Status', 'Reports', 'Projections', 'Configuration', 'About', 'Welcome, Brian!', and 'Log Out'. The main menu includes 'Navigation', 'ActionPaks', 'What if...?', 'View/edit drivers', 'Across the board (all line items)', 'Monthly spreading (all line items)', 'Notes', and 'Files'. The 'ActionPaks' menu is selected, and the 'Add ActionPak' button is highlighted with a red arrow and the number 1. The 'ActionPak configuration' section is visible, showing the 'ActionPak name' field set to 'Pool 1' and the 'ActionPak code' field set to 'Priority 1'. The 'Active' checkbox is checked. The 'Add ActionPak' button is highlighted with a red arrow and the number 1.

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'.

The screenshot shows the 'Add ActionPak' dialog box. The 'New private ActionPak' radio button is selected. The 'Name' field contains 'Pool 1' and the 'Code' field contains 'Priority 1'. The 'Existing shared ActionPak' radio button is unselected, and the dropdown menu shows '(No shared ActionPaks available)'. The 'OK' button is highlighted with a red arrow and the number 3.

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'.



ActionPak configuration

ActionPak budgeting allows you to develop a separate account for an ActionPak, and then automatically merge it into your standard account. You will need to designate which accounts make up the ActionPak.

ActionPak name: You may use these up/down buttons to change the order in which your ActionPaks appear.

ActionPak code:

Active

Accounts used in this ActionPak:

These accounts currently make up this ActionPak. You may add more accounts from the list of available ones at right. If you've mistakenly added an account to the ActionPak, or want to remove one for any reason, you may do so, but you will lose any currently budgeted values for it.

Account class	Account number	Line Item
Expense	6200	Salaries - Administration Full Time
Expense	6850	Allocated Fringe Benefits

Add or remove accounts from the ActionPak:

Accounts available for use in ActionPaks:

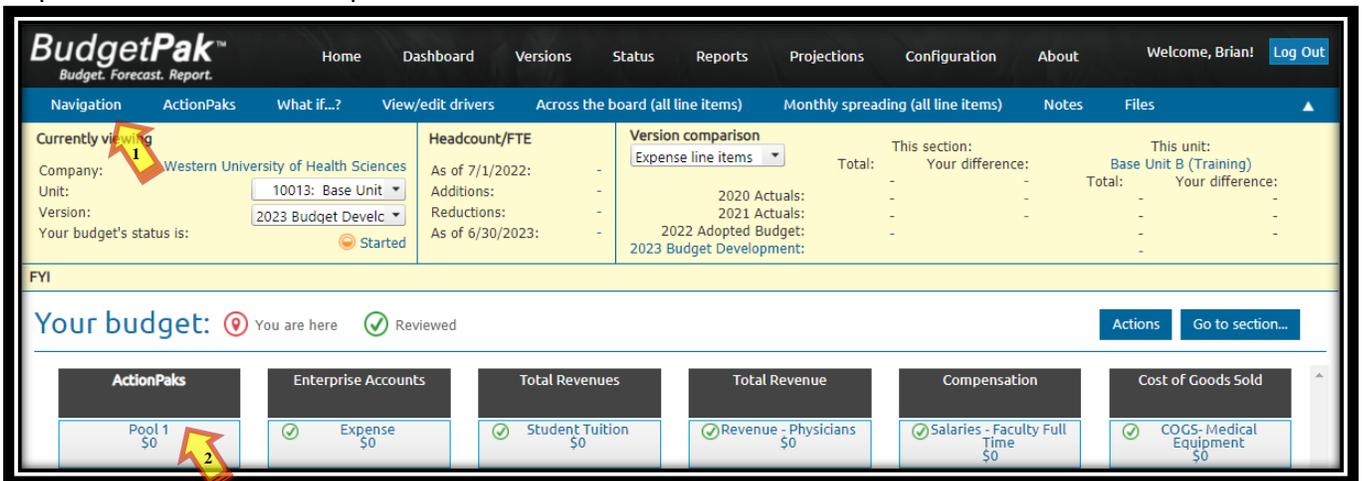
These are the list of accounts that are available to become part of this ActionPak. You may select as many accounts as you wish to include in the ActionPak by clicking the 'Add account' button.

Account class	Account number	Line Item
Income	5001	Student Tuition
Income	5920	Transportation Reimbursements
Expense	6450	Salaries - Incentive Pay
Expense	6600	Wages Admin Staff-Full time
Expense	6999	Wages Paid Outside Agencies

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.



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Home Dashboard Versions Status Reports Projections Configuration About Welcome, Brian!

Navigation ActionPaks What if...? View/edit drivers Across the board (all line items) Monthly spreading (all line items) Notes Files

Currently viewing:  Western University of Health Sciences

Company: Western University of Health Sciences

Unit:

Version:

Your budget's status is: Started

Headcount/FTE

As of 7/1/2022: -

Additions: -

Reductions: -

As of 6/30/2023: -

Version comparison

Expense line items

2020 Actuals: -

2021 Actuals: -

2022 Adopted Budget: -

2023 Budget Development: -

Total: - This section: - Your difference: -

This unit: Base Unit B (Training) Total: - Your difference: -

FYI

Your budget: You are here Reviewed

ActionPaks	Enterprise Accounts	Total Revenues	Total Revenue	Compensation	Cost of Goods Sold
<input checked="" type="checkbox"/> Pool 1 \$0	<input checked="" type="checkbox"/> Expense \$0	<input checked="" type="checkbox"/> Student Tuition \$0	<input checked="" type="checkbox"/> Revenue - Physicians \$0	<input checked="" type="checkbox"/> Salaries - Faculty Full Time \$0	<input checked="" type="checkbox"/> COGS- Medical Equipment \$0

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'.

The screenshot displays the BudgetPak software interface. At the top, there is a navigation bar with options like Home, Dashboard, Versions, Status, Reports, Projections, Configuration, About, and a user profile for 'Welcome, Brian!' with a 'Log Out' button. Below this is a secondary navigation bar with tabs for 'ActionPaks', 'What if...?', 'View/edit drivers', 'Across the board (all line items)', 'Monthly spreading (all line items)', 'Notes', and 'Files'. The main content area is titled 'Pool 1' and contains two steps. Step 1, 'Salaries - Faculty Full Time', shows a value of 6000 and a dropdown menu for 'By annual amount' which is highlighted with a red arrow labeled '1'. The input field for the annual amount is set to '\$0' and is highlighted with a red arrow labeled '2'. Step 2, 'Step 2 (optional)', has an 'Edit' button highlighted with a red arrow labeled '3'. Below Step 2, a pop-up window titled 'Edit note' is shown, with its 'OK' button highlighted by a red arrow labeled '4'. In the top right corner of the Pool 1 section, there are buttons for 'Discard', 'Close', 'Save', 'Next', and 'Back', with the 'Save' button highlighted by a red arrow labeled '5'.

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'.

Pool 1

This ActionPak consists of 2 line items. To budget these line items, proceed through each step, one at a time. On each step you will budget a separate line item.

Discard Close Save Next Back

Line item 1 of 2 **Line item 2 of 2**

Step 1

Salaries - Administration Full Time 6200

Please select one of the budget methods below and use it to designate the annual amount for this line item.

Select budget methods from here:

By annual amount
Enter annual amount here: \$0

By percent increase
Note: The 'By percent increase' option is not available because the percent increase basis version annual amount is not available or is zero.

By annual amount per head
Enter your budgeted headcount: As of 6/30/2023 0

By per head
Enter your annual amount per head here: \$0.00

By line item detail
This year's annual amount: \$0

By driver x rate

By rows and columns

Step 2 (optional)

Would you like to make a note about this line item? If so, enter your note here. It will be printed on some reports. You may enter up to 8000 characters.

Edit Import notes from prior budget

Line item usage

1 other section also uses this line item.

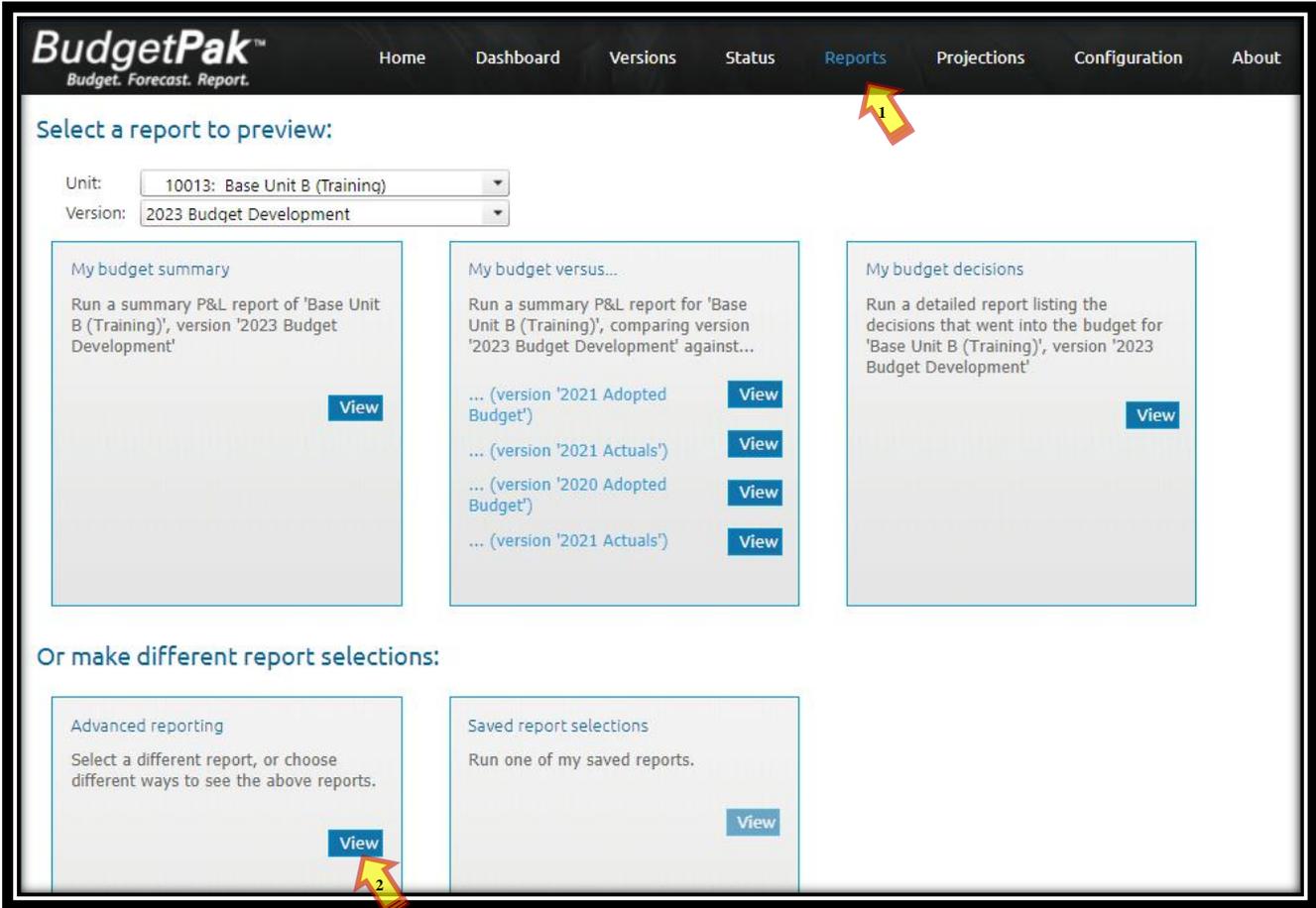
Section	Amount
1 Salaries - Administration Full Time	\$0
Total from other areas:	\$0
Total from here:	\$0
Total for this line item:	\$0

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'.

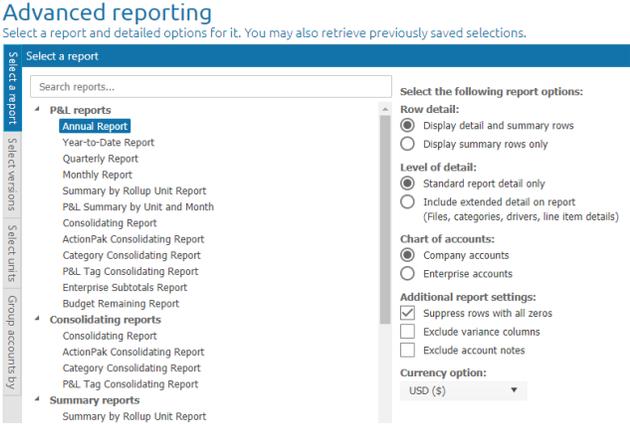
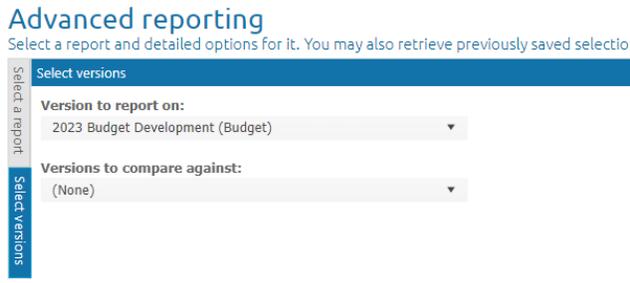
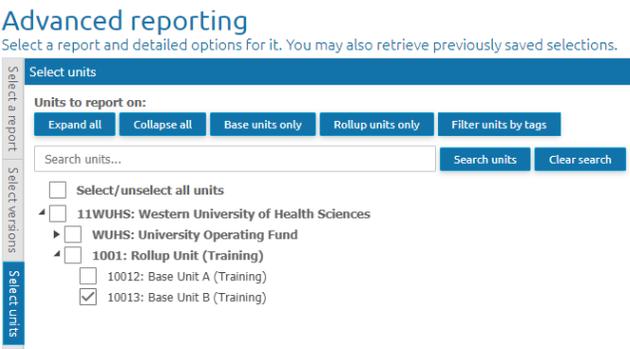
Section III: Creating an ActionPak Report

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:

 <p>Advanced reporting Select a report and detailed options for it. You may also retrieve previously saved selections.</p> <p>Select a report</p> <p>Search reports...</p> <ul style="list-style-type: none"> P&L reports <ul style="list-style-type: none"> 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 <ul style="list-style-type: none"> Consolidating Report ActionPak Consolidating Report Category Consolidating Report P&L Tag Consolidating Report Summary reports <ul style="list-style-type: none"> Summary by Rollup Unit Report <p>Select the following report options:</p> <p>Row detail:</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> Display detail and summary rows <input type="radio"/> Display summary rows only <p>Level of detail:</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> Standard report detail only <input type="radio"/> Include extended detail on report (Files, categories, drivers, line item details) <p>Chart of accounts:</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> Company accounts <input type="radio"/> Enterprise accounts <p>Additional report settings:</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Suppress rows with all zeros <input type="checkbox"/> Exclude variance columns <input type="checkbox"/> Exclude account notes <p>Currency option:</p> <p>USD (\$) ▼</p>	<ol style="list-style-type: none"> 1. Click ‘Annual Report’ 2. Check off the boxes as shown in the example
 <p>Advanced reporting Select a report and detailed options for it. You may also retrieve previously saved selections.</p> <p>Select versions</p> <p>Version to report on:</p> <p>2023 Budget Development (Budget) ▼</p> <p>Versions to compare against:</p> <p>(None) ▼</p>	<ol style="list-style-type: none"> 3. Select ‘2023 Budget Development’ from ‘Version to report on’ 4. Select ‘(None)’ from ‘Versions to compare against’
 <p>Advanced reporting Select a report and detailed options for it. You may also retrieve previously saved selections.</p> <p>Select units</p> <p>Units to report on:</p> <p>Expand all Collapse all Base units only Rollup units only Filter units by tags</p> <p>Search units... Search units Clear search</p> <ul style="list-style-type: none"> <input type="checkbox"/> Select/unselect all units <input checked="" type="checkbox"/> 11WUHS: Western University of Health Sciences <ul style="list-style-type: none"> <input type="checkbox"/> WUHS: University Operating Fund <ul style="list-style-type: none"> <input checked="" type="checkbox"/> 1001: Rollup Unit (Training) <ul style="list-style-type: none"> <input type="checkbox"/> 10012: Base Unit A (Training) <input checked="" type="checkbox"/> 10013: Base Unit B (Training) 	<ol style="list-style-type: none"> 5. Select the desired unit.

Section III: Creating an ActionPak Report

<p>Advanced reporting Select a report and detailed options for it. You may also retrieve previously saved selections.</p> <p>Group accounts by</p> <p>Select how you want to group your accounts: <input type="radio"/> Group accounts by subtotals <input type="radio"/> Group accounts by sections <input checked="" type="radio"/> Group accounts by ActionPaks only</p> <p>ActionPaks to report on: <input type="button" value="Expand all ActionPaks"/> <input type="button" value="Collapse all ActionPaks"/></p> <p>Search ActionPaks...</p> <p><input checked="" type="checkbox"/> Select all ActionPaks <input type="checkbox"/> Include inactive ActionPaks</p> <p><input checked="" type="checkbox"/> ActionPaks <input checked="" type="checkbox"/> Pool 1 (10013: Base Unit B (Training))</p>	<p>6. Select “Group accounts by ActionPaks only”</p> <p>7. Click “Select all ActionPaks”</p>
<p>Annual Report</p> <ul style="list-style-type: none"> • 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)) <p><input type="button" value="View the report"/></p> <p>Your report will appear in a new tab or a new browser window depending on how your browser is configured.</p>	<p>8. Click ‘View the Report’</p>

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.

The screenshot shows the BudgetPak Reporting interface. At the top, there are three buttons: "Send to PDF", "Send to Excel", and "Send to Excel (data only)". A red arrow points to the "Send to Excel (data only)" button. Below the buttons is a navigation bar with "1 of 2" and "Find | Next". The main content area is titled "ActionPak Report" and displays the following information:

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'.

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Home Dashboard **Versions** Status Reports Projections Configuration About Welcome, Brian! Log Out

Versions

Select a unit

Select the unit you would like to work with: 10013: Base Unit B (Select unit...

The last version you were working with was: 2023 Budget Development

You may select another version below, or:

Resume editing Multiple budgets/forecasts...

Messages

Select a version

Here are the different versions you can view and work with for unit 'Base Unit B (Training)':

- Start new budgets from pre-defined defaults
- Start new budgets from scratch

Save descriptions

Version code	Version	Note	Your description	Status	Signed off	Date modified	Modified by	Your comments				
FY2019-...	2019 Adopted Bu...	AD	2019 Adopted Budget									View History
FY2019-...	2019 Adjusted Bu...	AD	2019 Adjusted Budget									View History
FY2019-...	2019 Actuals	AD	2019 Actuals									View History
FY2020-...	2020 Baseline Bu...	B	2020 Baseline Budget									View History
FY2020-...	2020 Requested B...		2020 Requested Budget	🟢	☑	11/19/2018 9:30 AM	Budget					View History
FY2020-...	2020 Requested B...		2020 Requested Budget - 2					(Not started yet)				View History
FY2020-...	2020 Operating B...		2020 Operating Budget	🟢	☑	4/16/2019 5:29 PM	Mendoza					View History
FY2021-...	2021 Baseline Bu...	B	2021 Baseline Budget									View History
FY2021-...	2021 Budget Dev...		2021 Budget Developmen...	🟢		3/23/2020 2:16 PM	Cho					View History
FY2021-...	2021 Budget Dev...		2021 Budget Development	🟢	☑	12/13/2019 7:41 PM	Mendoza					View History
FY2022-...	2022 Baseline Bu...	B	2022 Baseline Budget									View History
FY2022-...	2022 Budget Dev...		2022 Budget Development	🟢	☑	4/20/2021 11:48 AM	Cho					View History
FY2023-...	2023 Baseline Bu...	B	2023 Baseline Budget									View Copy History
FY2023-...	2023 Budget Dev...		2023 Budget Development	🟢	Sign off	9/22/2021 12:42 PM	Hwang					Edit View Erase Copy History

Section IV: Marking all Sections as Reviewed and Complete

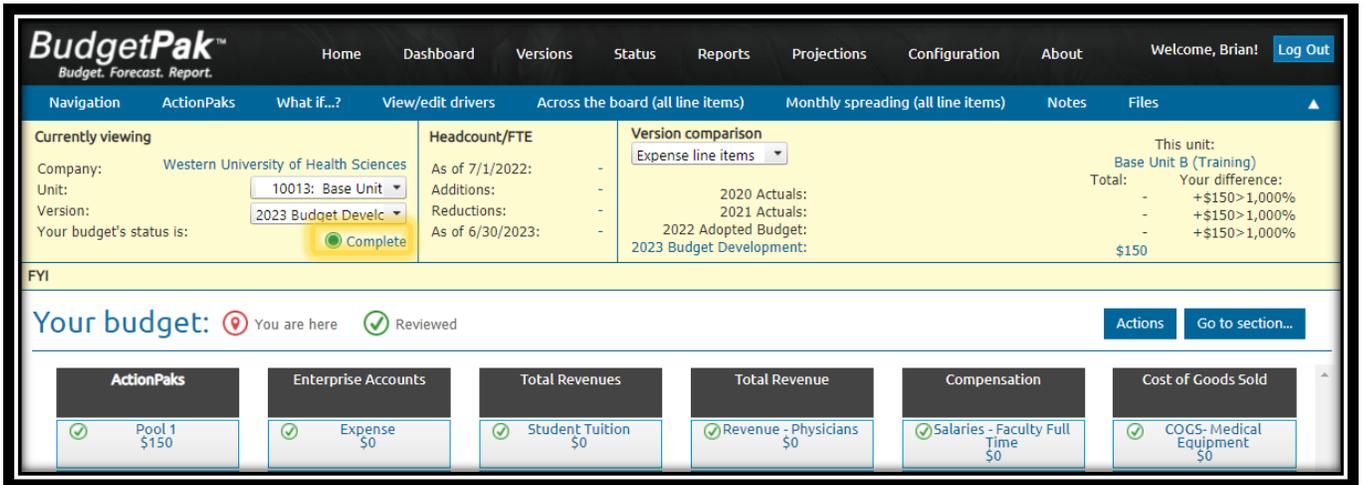
Step 2: Click 'Actions' and click 'Mark all sections Reviewed'. Click 'OK' on the pop-up window.

The screenshot shows the BudgetPak interface. At the top, there is a navigation bar with links: Home, Dashboard, Versions, Status, Reports, Projections, Configuration, About, Welcome, Brian!, and Log Out. Below this is a secondary navigation bar with categories: Navigation, ActionPaks, What if...?, View/edit drivers, Across the board (all line items), Monthly spreading (all line items), Notes, and Files. The main content area is divided into several sections. On the left, 'Currently viewing' shows details for 'Western University of Health Sciences' with a '2023 Budget Development' version. The 'Headcount/FTE' section shows dates and status. The 'Version comparison' section shows a table of financial data. Below this is a 'Your budget:' section with a status indicator and a list of budget sections: ActionPaks, Enterprise Accounts, Total Revenues, Total Revenue, and Compensation. A dropdown menu is open over the 'Actions' button, showing options: Show ALL sections, Mark all sections Reviewed, Create on-demand template, Import from on-demand template, and Check for completion. Red arrows with numbers 1, 2, and 3 point to the 'Actions' button, the 'Mark all sections Reviewed' option, and the 'OK' button in the pop-up window, respectively.

The pop-up dialog box is titled 'Mark all sections Reviewed'. It contains the following text: 'You have selected 'Mark all sections Reviewed'. This action will set all unvisited line items to \$0, and will make it appear as if you have in fact reviewed all sections (even though you haven't). Spreading defaults will be applied. Any section with an account with a mandatory note will NOT be marked as reviewed. OK to proceed?'. At the bottom, there are two buttons: 'OK' and 'Cancel'.

Section IV: Marking all Sections as Reviewed and Complete

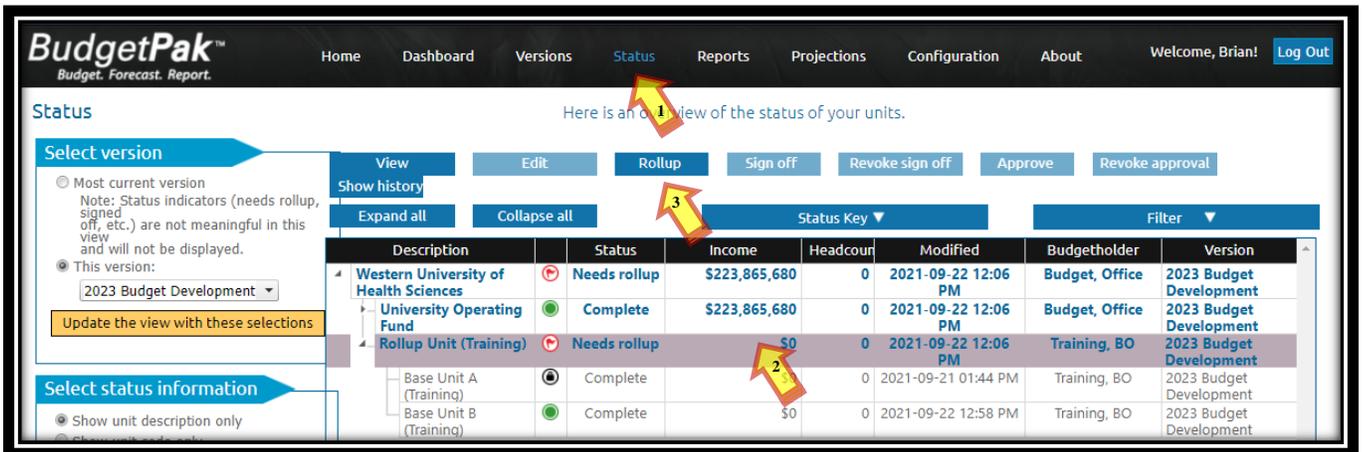
Step 3: Once complete, the 'Your budget status is' indicator will change from 'Started' to 'Complete'.



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.

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Home Dashboard Versions Status Reports Projections Configuration About Welcome, Brian! Log Out

Status Here is an overview of the status of your units.

Select version

- Most current version
Note: Status indicators (needs rollup, signed off, etc.) are not meaningful in this view and will not be displayed.
- This version: 2023 Budget Development
- Update the view with these selections

Select status information

- Show unit description only

View Edit Rollup Sign off Revoke sign off Approve Revoke approval

Show history Expand all Collapse all Status Key Filter

Description	Status	Income	Headcount	Modified	Budgetholder	Version
Western University of Health Sciences	Complete	\$223,865,680	0	2021-09-22 02:06 PM	Budget, Office	2023 Budget Development
University Operating Fund	Complete	\$223,865,680	0	2021-09-22 12:06 PM	Budget, Office	2023 Budget Development
Rollup Unit (Training)	Complete	\$0	0	2021-09-22 02:06 PM	Training, BO	2023 Budget Development
Base Unit A (Training)	Complete	\$0	0	2021-09-21 01:44 PM	Training, BO	2023 Budget Development
Base Unit B (Training)	Complete	\$0	0	2021-09-22 12:58 PM	Training, BO	2023 Budget Development

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'.

The screenshot shows the BudgetPak interface with the 'Status' tab selected. A sidebar on the left contains 'Select version' and 'Select status information' sections. The main area features a table of units with columns for Description, Status, Income, Headcount, Modified, Budgetholder, and Version. The 'Sign off' button is highlighted with a red arrow and a '2' in a yellow circle. A red arrow with a '1' in a yellow circle points to the 'Complete' status of 'Base Unit B (Training)'.

Description	Status	Income	Headcount	Modified	Budgetholder	Version
Western University of Health Sciences	Complete	\$223,865,680	0	2021-09-22 02:06 PM	Budget, Office	2023 Budget Development
University Operating Fund	Complete	\$223,865,680	0	2021-09-22 12:06 PM	Budget, Office	2023 Budget Development
Rollup Unit (Training)	Complete	\$0	0	2021-09-22 02:06 PM	Training, BO	2023 Budget Development
Base Unit A (Training)	Complete	\$0	0	2021-09-21 01:44 PM	Training, BO	2023 Budget Development
Base Unit B (Training)	Complete	\$0	0	2021-09-22 04:32 PM	Training, BO	2023 Budget Development

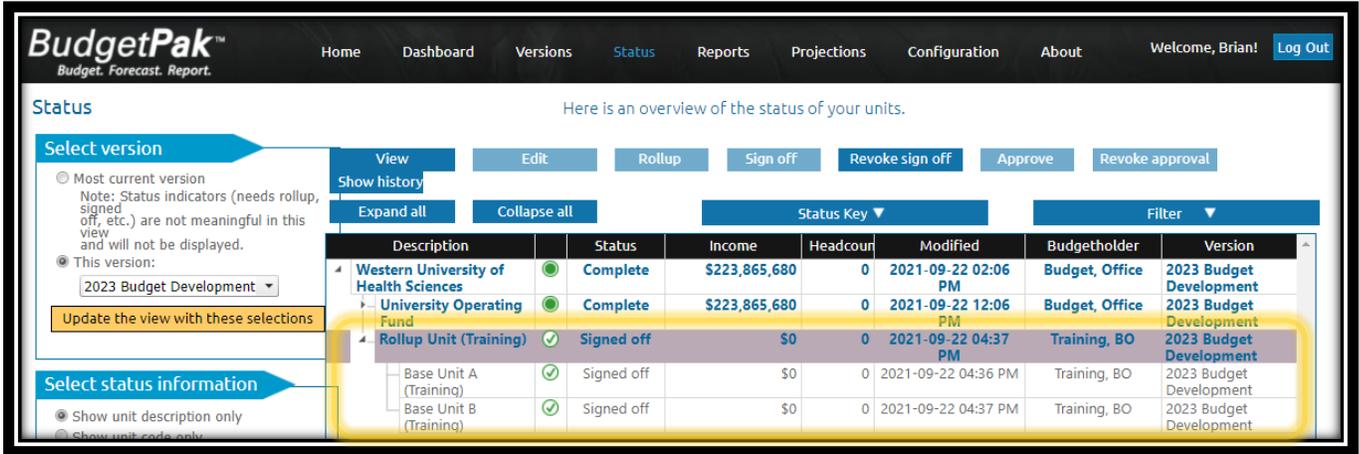
Note: Once the unit has changed the status key will change to signed off as shown below.

The screenshot shows the BudgetPak interface after a unit has been signed off. The 'Status Key' dropdown menu is now open, and the 'Signed off' status is visible in the table. A red arrow with a '1' in a yellow circle points to the 'Signed off' status of 'Base Unit A (Training)'.

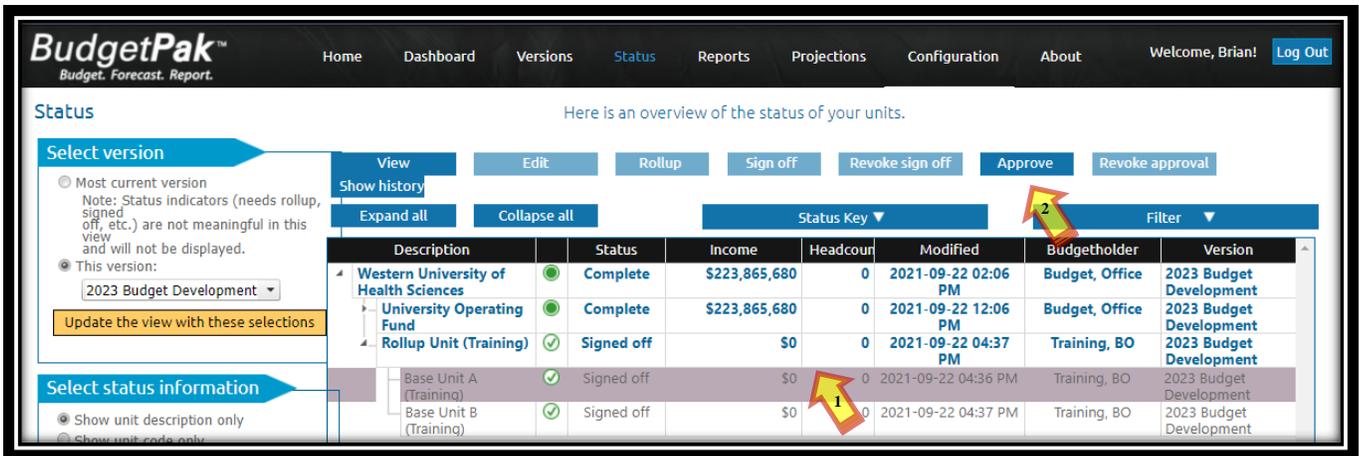
Description	Status	Income	Headcount	Modified	Budgetholder	Version
Western University of Health Sciences	Complete	\$223,865,680	0	2021-09-22 02:06 PM	Budget, Office	2023 Budget Development
University Operating Fund	Complete	\$223,865,680	0	2021-09-22 12:06 PM	Budget, Office	2023 Budget Development
Rollup Unit (Training)	Complete	\$0	0	2021-09-22 02:06 PM	Training, BO	2023 Budget Development
Base Unit A (Training)	Signed off	\$0	0	2021-09-22 04:36 PM	Training, BO	2023 Budget Development
Base Unit B (Training)	Complete	\$0	0	2021-09-22 04:32 PM	Training, BO	2023 Budget Development

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

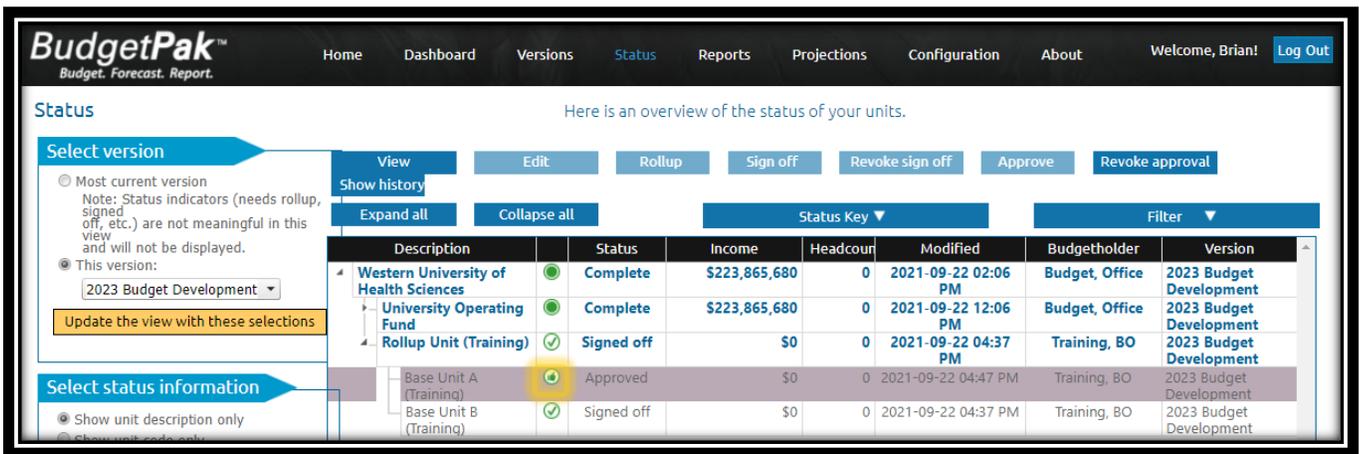
Step 2: Repeat step 1 for all 'Base unit(s)' and 'Rollup Unit(s)'.



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'.