

Requesting Top Three Priorities using BudgetPak ActionPaks

Overview

This guide contains instructions on how to complete the FY2024 top three college/department priority requests using BudgetPak.

Financial information has been provided in BudgetPak for the completion of the 2024 Budget Development version. BudgetPak contains versions: 2023 Adopted Budget, 2022 Actuals, and 2021 Actuals that can be used to view and aid during the budget planning process.

In this phase each college/department will access the 2024 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'.

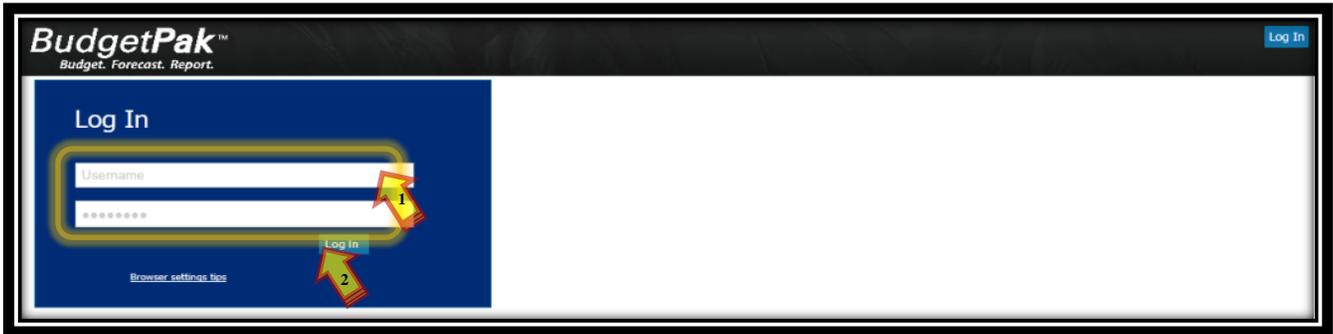
What to Expect: Step-by-Step

- 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>

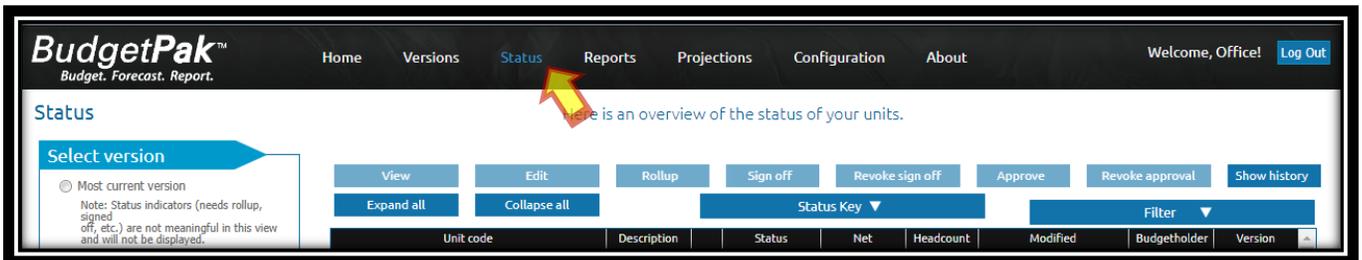
Step 2: Enter username and password. Click 'Log In'.



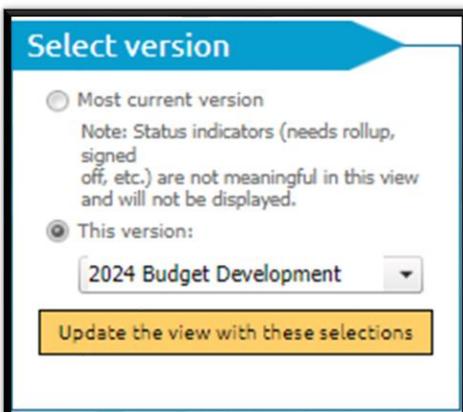
Note: For all Login issues, please contact the budget office at Budget@westernu.edu

Section I: Uploading & Accessing BudgetPak Files

Step 1: Click 'Status'.

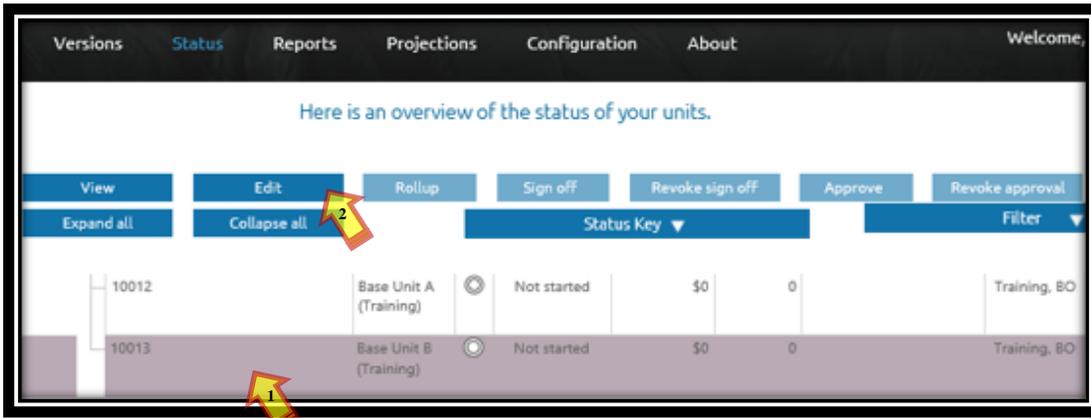


Step 2: Select '2024 Budget Development' in the 'Status' menu to the left. Then click 'Update the view with these selections'

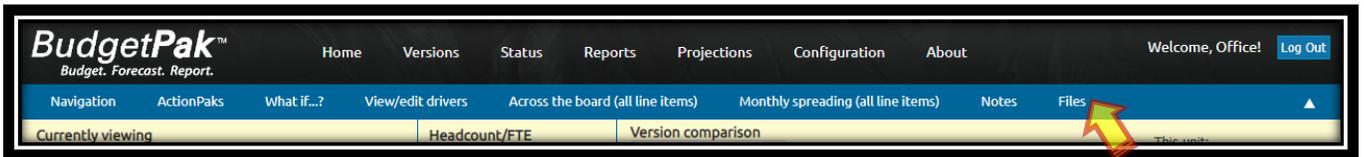


Section I: Uploading & Accessing BudgetPak Files

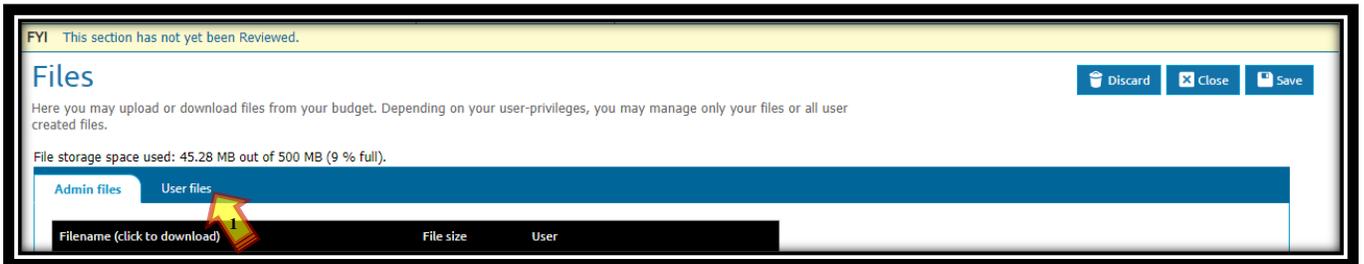
Step 3: Highlight the desired organization/department. Then click 'Edit'



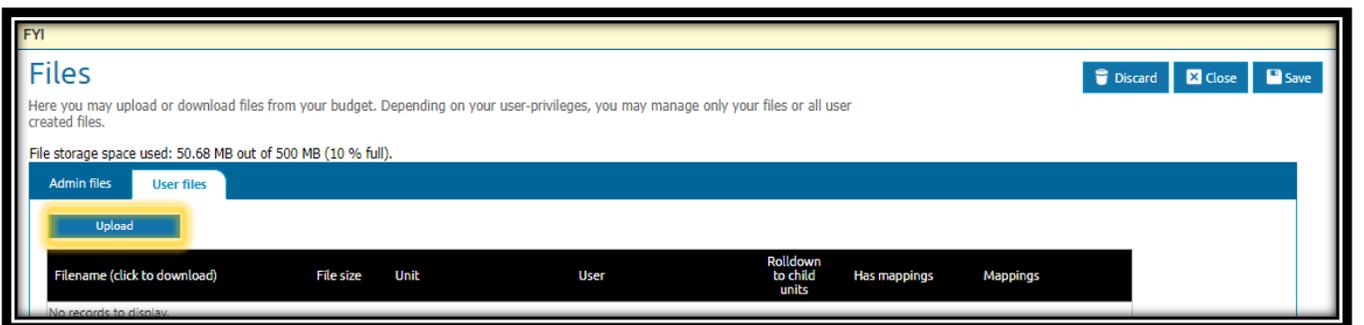
Step 4: Click 'Files'



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

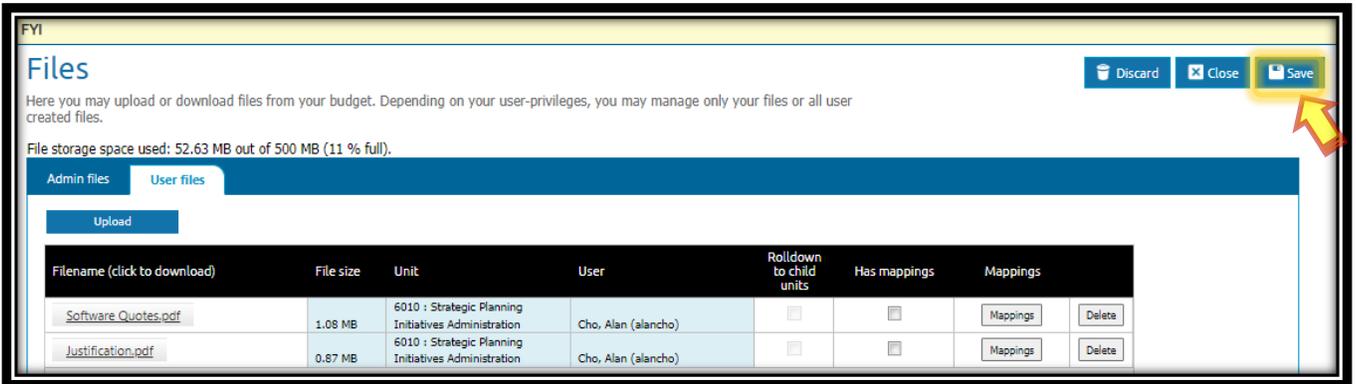


Step 6: Click 'Upload' and select the file(s) you would like to upload.



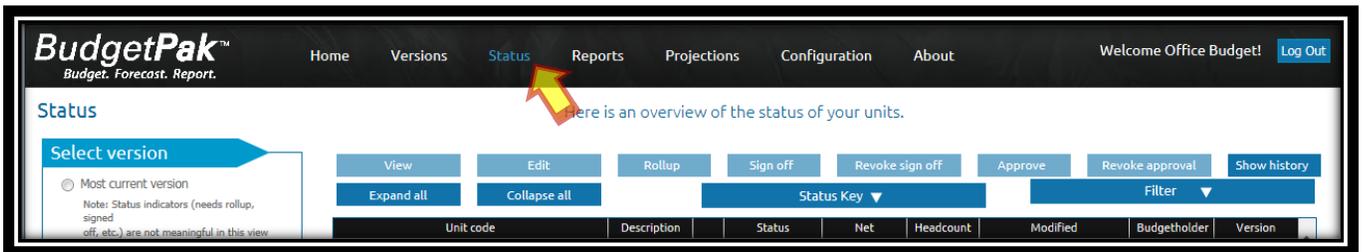
Section I: Uploading & Accessing BudgetPak Files

Step 7: Click 'Save'. If any changes need to be made to documents already uploaded, Delete the previous file and repeat Step 6 to upload the corrected documents.

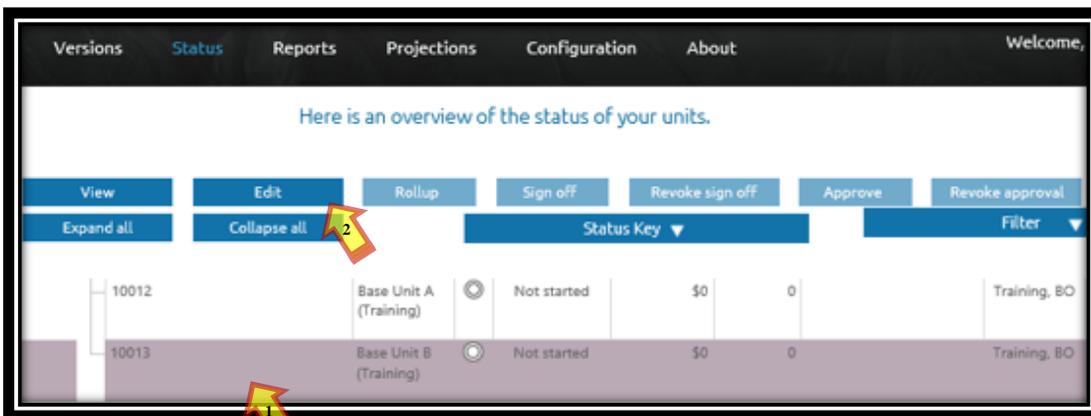


Section II: Creating ActionPaks for Top Three Priorities

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', and 'About'. The user is logged in as 'Welcome, Alan!'. The main content area is titled 'ActionPak configuration' and includes a 'Discard' button, a 'Close' button, and a 'Save' button. The 'Add ActionPak' button is highlighted with a red arrow and the number 1. The 'Delete ActionPak' button is highlighted with a red arrow and the number 2. The interface also shows a 'Company' dropdown set to 'Western University of Health Sciences', a 'Unit' dropdown set to '10012: Base Unit A', and a 'Version' dropdown set to '2024 Budget Developm'. The 'Active' checkbox is checked.

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 2' and the 'Code' field contains 'Priority 1'. The 'Existing shared ActionPak' radio button is unselected. The 'OK' button is highlighted with a red arrow and the number 3. The dialog box also includes a 'Cancel' button and a dropdown menu for 'Existing shared ActionPak' with the text '(No shared ActionPaks available)'.

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.

Discard Close Save

You have unsaved changes!

ActionPak name: Pool 2

ActionPak code: Priority 1

Active

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

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 | 6600 | Wages Admin Staff-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 be a 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 |
|---------------|----------------|-----------------------------|
| Expense | 70040 | Organizational Sponsorships |
| Expense | 70055 | Marketing |
| Expense | 70211 | Cellular Phone Stipend |
| Expense | 70280 | Telephone |
| Expense | 70300 | Continuing Education |
| Expense | 70302 | Faculty Development |

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, Alan! Log Out

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

Currently viewing

Company: Western University of Health Sciences

Unit: 10012: Base Unit A

Version: 2024 Budget Developm

Your budget's status is: Started

Headcount/FTE

As of 7/1/2023: -

Additions: -

Reductions: -

As of 6/30/2024: -

Version comparison

Expense line items

This stack: ActionPaks

Total: -

Your difference: -

This unit: Base Unit A (Training)

Total: -

Your difference: -

FYI

Your budget: You are here Reviewed

Actions Go to section...

| ActionPaks | Enterprise Accounts | Total Revenues | Total Revenue | Compensation | Advertising Marketing Promotion |
|---------------|---------------------|------------------------|----------------------|-------------------------------------|---------------------------------|
| Pool 2 \$0 | Income \$0 | Student Tuition \$0 | Revenue-Other \$0 | Salaries - Faculty Full Time \$0 | Advertising \$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, the navigation bar includes 'Home', 'Dashboard', 'Versions', 'Status', 'Reports', 'Projections', 'Configuration', and 'About'. The user is logged in as 'Alan!'. The main content area is titled 'Pool 2' and shows 'Line item 1 of 2' selected. The 'Step 1' section is titled 'Wages Admin Staff-Full time' with a value of 6600. It prompts the user to select a budget method. The 'By annual amount' method is selected, and the 'Enter annual amount here:' field contains '\$41,600'. A red arrow labeled '1' points to the 'By annual amount' radio button, and another red arrow labeled '2' points to the amount field. The 'Step 2 (optional)' section asks for a note about the line item. A red arrow labeled '3' points to the 'Edit' button. Below the main interface, an 'Edit note' pop-up window is shown with the text 'New Administrative Assistant Position' and a text area for notes. A red arrow labeled '4' points to the 'OK' button in the pop-up window. A 'You have unsaved changes!' notification is visible in the top right corner of the main interface.

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 2

← Back
Discard
Close
Save
Next →

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.

Line item 1 of 2

Line item 2 of 2

Step 1

Allocated Fringe Benefits 6850

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:

By percent increase

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 per head

By annual amount per head

By line item detail

Your budgeted headcount: As of 6/30/2024

By driver x rate

Enter your annual amount per head here:

By rows and columns

This year's annual amount:

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.

Associated FB

Edit
Import notes from prior budgets

Line item usage

1 other section also uses this line item.

| | | |
|----------------------------------|-----------------|--|
| Total from other areas: | \$0 | |
| Total from here: | \$13,811 | |
| Total for this line item: | \$13,811 | |

| | Section | Amount |
|---|---------------------------|--------|
| 1 | Allocated Fringe Benefits | \$0 |

Summary

This is a summary of the line items in this actionpak.

| | | |
|------------------|----------|--|
| ActionPak total: | \$55,411 | |
|------------------|----------|--|

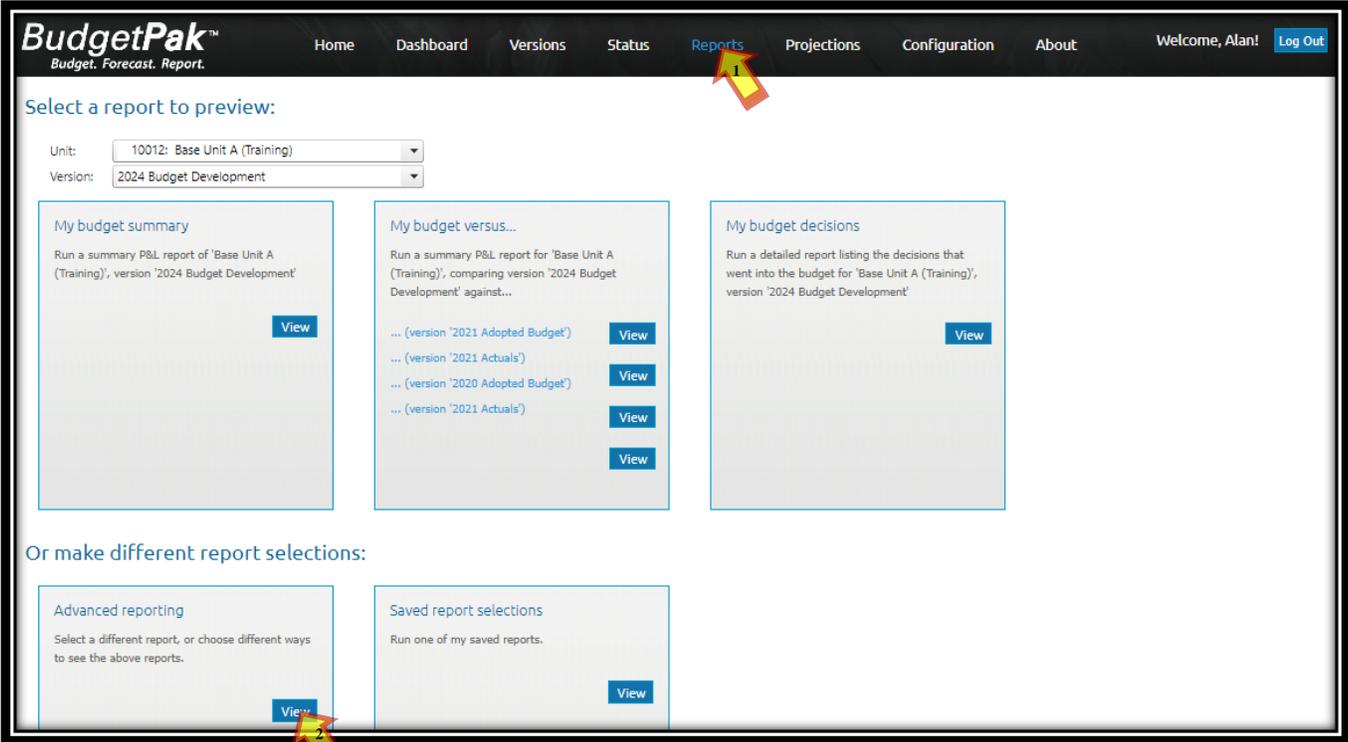
| | Line item | Amount |
|---|-----------------------------|----------|
| 1 | Wages Admin Staff-Full time | \$41,600 |
| 2 | Allocated Fringe Benefits | \$13,811 |

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 'ActionPak'.

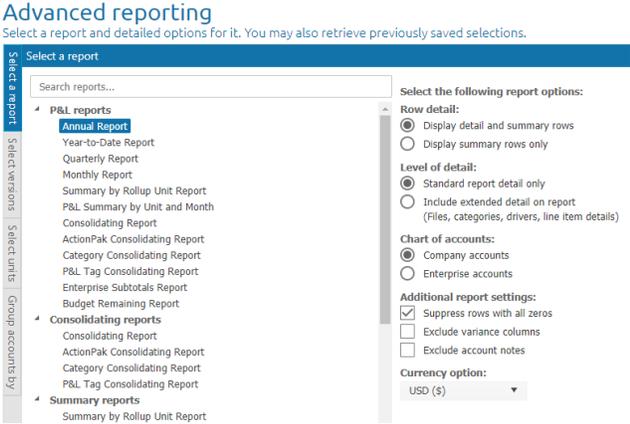
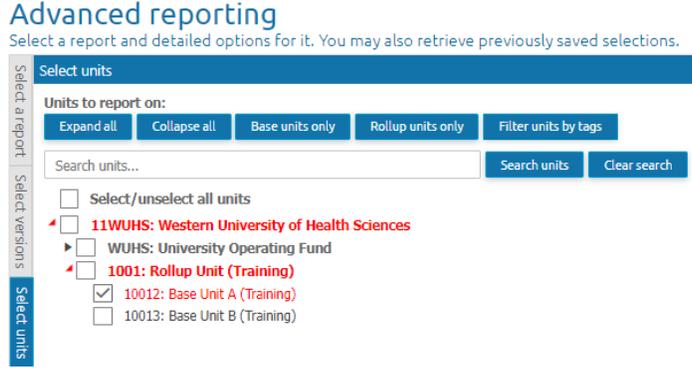
Section III: Creating an ActionPak Report

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:

| | |
|---|--|
|  | <ol style="list-style-type: none"> 1. Click ‘Annual Report’ 2. Check off the boxes as shown in the example |
|  | <ol style="list-style-type: none"> 3. Select ‘2024 Budget Development’ from ‘Version to report on’ 4. Select ‘(None)’ from ‘Versions to compare against’ |
|  | <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 type="checkbox"/> Select all ActionPaks <input type="checkbox"/> Include inactive ActionPaks</p> <p><input checked="" type="checkbox"/> ActionPaks</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Pool 2 (10012: Base Unit A (Training)) <input checked="" type="checkbox"/> Pool 2 (10012: Base Unit A (Training)) <input checked="" type="checkbox"/> Pool 2 (10012: Base Unit A (Training)) | <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: 2024 Budget Development (Budget) • 1 unit(s) selected 10012: Base Unit A (Training) • No tags selected. • Group by: ActionPaks Pool 2 (10012: Base Unit A (Training)) Pool 2 (10012: Base Unit A (Training)) Pool 2 (10012: Base Unit A (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.

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Send to Excel (data only): For advanced users. Not available for all reports. May include blank columns that are not used with current report selections.

1 of 2 Find | Next

ActionPak Report

Company: Western University of Health Sciences
 Version: 2024 Budget Development
 Unit: 10012: Base Unit A (Training)
 Budget holder: Training, BO (botraining)

| | |
|------------------------|------------|
| ActionPak: | Pool 2 |
| ActionPak code: | Priority 1 |

| Account | Description | 2024 Budget Development | Notes for 2024 Budget Development |
|----------------------|-----------------------------|-------------------------|---------------------------------------|
| 6600 | Wages Admin Staff-Full time | \$41,600 | New Administrative Assistant Position |
| 6850 | Allocated Fringe Benefits | \$13,811 | Associated FB |
| Expense | Pool 2 | \$55,411 | |
| TOTAL EXPENSE | | \$55,411 | |

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, Alan! Log Out

Versions

Select a unit

Select the unit you would like to work with: 10012: Base Unit A (Trai) [Select unit...](#)

The last version you were working with was: 2024 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 A (Training)':

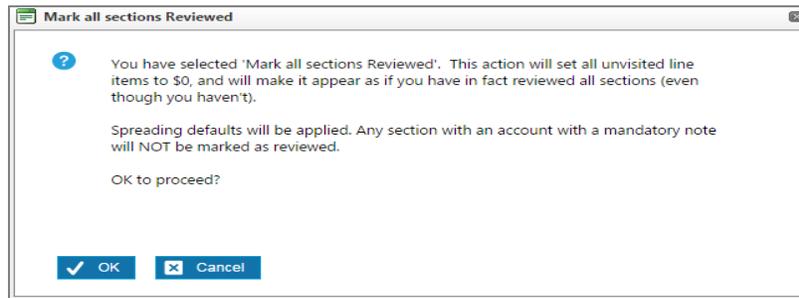
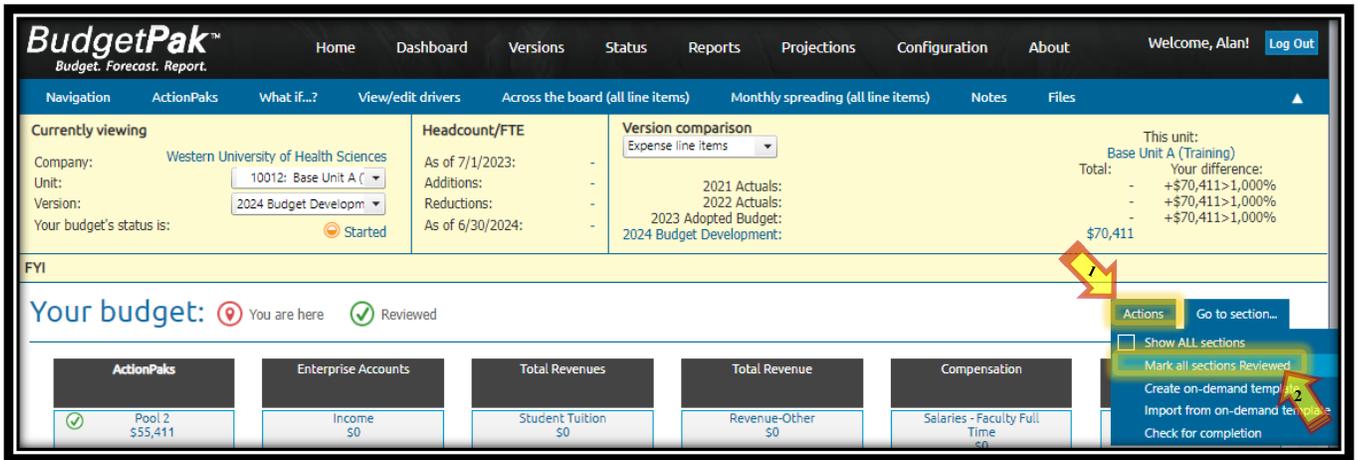
Start new budgets from pre-defined defaults
 Start new budgets from scratch

[Save descriptions](#)

| Version code | Version | Note | Your description | Status | Signed off | Date modified | Modified by | Your comments | | | | |
|--------------|--------------------------|------|-----------------------------|--------|-------------------------------------|--------------------|-------------|---------------|--|-------------------|--|------------------------------|
| FY2019-R-83 | 2019 Actuals | AD | 2019 Actuals | | | | | | | | | View History |
| FY2020-D-84 | 2020 Baseline Budget | B | 2020 Baseline Budget | | | | | | | | | View History |
| FY2020-D-85 | 2020 Requested Budget | | 2020 Requested Budget | 🟢 | <input checked="" type="checkbox"/> | 11/19/2018 9:30 AM | Budget | | | | | View History |
| FY2020-D-86 | 2020 Requested Budget... | | 2020 Requested Budget - 2 | | | | | | | (Not started yet) | | View History |
| FY2020-D-87 | 2020 Operating Budget | | 2020 Operating Budget | 🟢 | <input checked="" type="checkbox"/> | 4/16/2019 5:29 PM | Mendoza | | | | | View History |
| FY2021-D-94 | 2021 Baseline Budget | B | 2021 Baseline Budget | | | | | | | | | View History |
| FY2021-D-95 | 2021 Budget Developm... | | 2021 Budget Development/... | 🟡 | | 3/23/2020 2:31 PM | Cho | | | | | View History |
| FY2021-D-96 | 2021 Budget Developm... | | 2021 Budget Development | 🟢 | <input checked="" type="checkbox"/> | 12/13/2019 7:41 PM | Mendoza | | | | | View History |
| FY2022-D-103 | 2022 Baseline Budget | B | 2022 Baseline Budget | | | | | | | | | View History |
| FY2022-D-104 | 2022 Budget Developm... | | 2022 Budget Development | 🟢 | <input checked="" type="checkbox"/> | 4/20/2021 11:48 AM | Cho | | | | | View History |
| FY2023-D-109 | 2023 Baseline Budget | B | 2023 Baseline Budget | | | | | | | | | View History |
| FY2023-D-110 | 2023 Budget Developm... | | 2023 Budget Development | 🟢 | <input checked="" type="checkbox"/> | 5/10/2022 1:46 PM | Cho | | | | | View History |
| FY2024-D-115 | 2024 Baseline Budget | B | 2024 Baseline Budget | | | | | | | | | View Copy History |
| FY2024-D-116 | 2024 Budget Developm... | | 2024 Budget Development | 🟡 | <input type="checkbox"/> | 9/26/2022 5:13 PM | Cho | | | | | Edit View Erase Copy History |

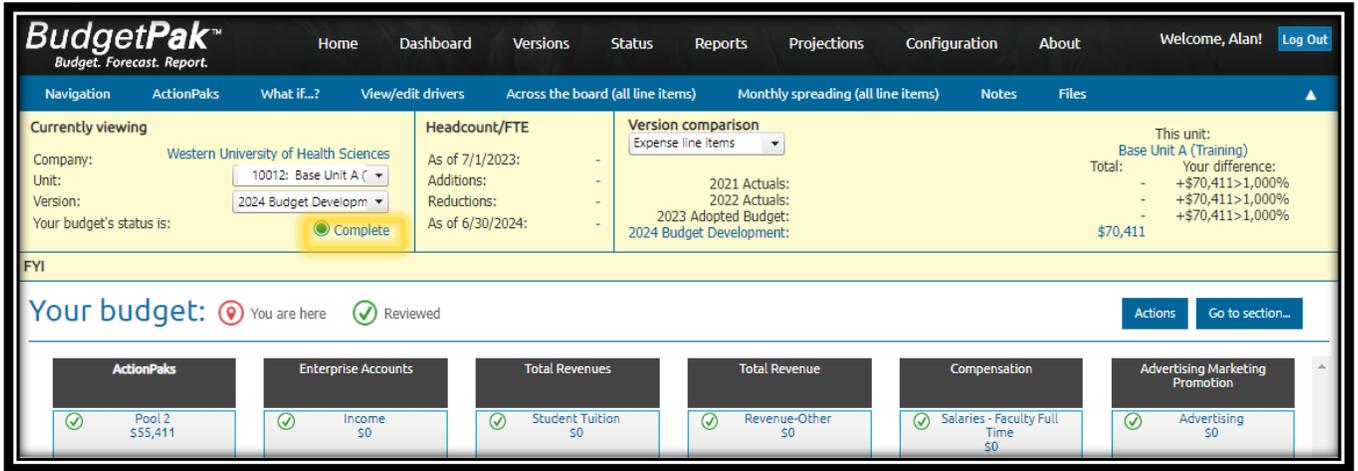
Section IV: Marking all Sections as Reviewed and Complete

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



Section IV: Marking all Sections as Reviewed and Complete

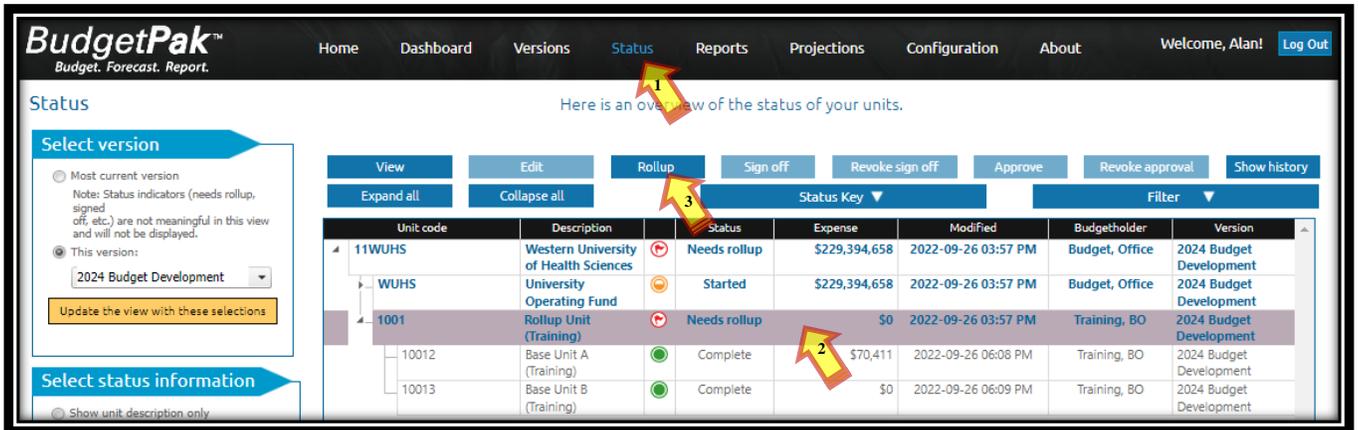
Step 3: Once complete, the 'Your budget status is' indicator will change from 'Started' to 'Complete'.



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, Alan! [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:
 2024 Budget Development
 Update the view with these selections

Select status information
 Show unit description only

| Unit code | Description | Status | Expense | Modified | Budgetholder | Version |
|-----------|---------------------------------------|--------------|---------------|---------------------|----------------|-------------------------|
| 11WUHS | Western University of Health Sciences | Needs rollup | \$229,394,658 | 2022-09-26 03:57 PM | Budget, Office | 2024 Budget Development |
| WUHS | University Operating Fund | Started | \$229,394,658 | 2022-09-26 03:57 PM | Budget, Office | 2024 Budget Development |
| 1001 | Rollup Unit (Training) | Complete | \$70,411 | 2022-09-26 06:11 PM | Training, BO | 2024 Budget Development |
| 10012 | Base Unit A (Training) | Complete | \$70,411 | 2022-09-26 06:08 PM | Training, BO | 2024 Budget Development |
| 10013 | Base Unit B (Training) | Complete | \$0 | 2022-09-26 06:09 PM | Training, BO | 2024 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' page selected. The page title is 'Status' and it says 'Here is an overview of the status of your units.' On the left, there are two sections: 'Select version' and 'Select status information'. The 'Select version' section has radio buttons for 'Most current version' and 'This version: 2024 Budget Development', with an 'Update the view with these selections' button. The 'Select status information' section has a radio button for 'Show unit description only'. The main area contains a table with columns: Unit code, Description, Status, Expense, Modified, Budgetholder, and Version. The table data is as follows:

| Unit code | Description | Status | Expense | Modified | Budgetholder | Version |
|-----------|---------------------------------------|--------------|---------------|---------------------|----------------|-------------------------|
| 11WUHS | Western University of Health Sciences | Needs rollup | \$229,394,658 | 2022-09-26 03:57 PM | Budget, Office | 2024 Budget Development |
| WUHS | University Operating Fund | Started | \$229,394,658 | 2022-09-26 03:57 PM | Budget, Office | 2024 Budget Development |
| 1001 | Rollup Unit (Training) | Complete | \$70,411 | 2022-09-26 06:11 PM | Training, BO | 2024 Budget Development |
| 10012 | Base Unit A (Training) | Complete | \$70,411 | 2022-09-26 06:14 PM | Training, BO | 2024 Budget Development |
| 10013 | Base Unit B (Training) | Complete | \$0 | 2022-09-26 06:09 PM | Training, BO | 2024 Budget Development |

Red arrows point to the 'Sign off' button in the top toolbar and the 'Complete' status of the '10012' unit in the table.

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

The screenshot shows the BudgetPak interface with the 'Status' page selected. The page title is 'Status' and it says 'Here is an overview of the status of your units.' On the left, there are two sections: 'Select version' and 'Select status information'. The 'Select version' section has radio buttons for 'Most current version' and 'This version: 2024 Budget Development', with an 'Update the view with these selections' button. The 'Select status information' section has a radio button for 'Show unit description only'. The main area contains a table with columns: Unit code, Description, Status, Expense, Modified, Budgetholder, and Version. The table data is as follows:

| Unit code | Description | Status | Expense | Modified | Budgetholder | Version |
|-----------|---------------------------------------|--------------|---------------|---------------------|----------------|-------------------------|
| 11WUHS | Western University of Health Sciences | Needs rollup | \$229,394,658 | 2022-09-26 03:57 PM | Budget, Office | 2024 Budget Development |
| WUHS | University Operating Fund | Started | \$229,394,658 | 2022-09-26 03:57 PM | Budget, Office | 2024 Budget Development |
| 1001 | Rollup Unit (Training) | Complete | \$70,411 | 2022-09-26 06:11 PM | Training, BO | 2024 Budget Development |
| 10012 | Base Unit A (Training) | Signed off | \$70,411 | 2022-09-26 06:16 PM | Training, BO | 2024 Budget Development |
| 10013 | Base Unit B (Training) | Complete | \$0 | 2022-09-26 06:09 PM | Training, BO | 2024 Budget Development |

A red arrow points to the 'Signed off' status of the '10012' unit in the table.

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

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

The screenshot shows the BudgetPak interface with the 'Status' tab selected. A table lists units with columns for Unit code, Description, Status, Expense, Modified, Budgetholder, and Version. The '1001' Rollup Unit (Training) and its sub-units '10012' (Base Unit A) and '10013' (Base Unit B) are highlighted with a yellow box. All these units have a green checkmark icon and the status 'Signed off'.

| Unit code | Description | Status | Expense | Modified | Budgetholder | Version |
|-----------|---------------------------------------|--------------|---------------|---------------------|----------------|-------------------------|
| 11WUHS | Western University of Health Sciences | Needs rollup | \$229,394,658 | 2022-09-26 03:57 PM | Budget, Office | 2024 Budget Development |
| WUHS | University Operating Fund | Started | \$229,394,658 | 2022-09-26 03:57 PM | Budget, Office | 2024 Budget Development |
| 1001 | Rollup Unit (Training) | Signed off | \$70,411 | 2022-09-26 06:16 PM | Training, BO | 2024 Budget Development |
| 10012 | Base Unit A (Training) | Signed off | \$70,411 | 2022-09-26 06:16 PM | Training, BO | 2024 Budget Development |
| 10013 | Base Unit B (Training) | Signed off | \$0 | 2022-09-26 06:16 PM | Training, BO | 2024 Budget Development |

Step 3: To approve a unit, select each Base Unit and Rollup unit/organization. Click 'Approve'. Repeat this step for all.

The screenshot shows the same BudgetPak interface. A red arrow labeled '2' points to the 'Approve' button in the top navigation bar. Another red arrow labeled '1' points to the 'Signed off' status of the '10012' unit in the table.

Note: Once the unit has been approved the status key indicator will change to approved as shown below.

The screenshot shows the BudgetPak interface after the 'Approve' action. The '10012' unit's status has changed from 'Signed off' to 'Approved', indicated by a green checkmark icon in the status column.

| Unit code | Description | Status | Expense | Modified | Budgetholder | Version |
|-----------|---------------------------------------|--------------|---------------|---------------------|----------------|-------------------------|
| 11WUHS | Western University of Health Sciences | Needs rollup | \$229,394,658 | 2022-09-26 03:57 PM | Budget, Office | 2024 Budget Development |
| WUHS | University Operating Fund | Started | \$229,394,658 | 2022-09-26 03:57 PM | Budget, Office | 2024 Budget Development |
| 1001 | Rollup Unit (Training) | Signed off | \$70,411 | 2022-09-26 06:16 PM | Training, BO | 2024 Budget Development |
| 10012 | Base Unit A (Training) | Approved | \$70,411 | 2022-09-26 06:17 PM | Training, BO | 2024 Budget Development |
| 10013 | Base Unit B (Training) | Signed off | \$0 | 2022-09-26 06:16 PM | Training, BO | 2024 Budget Development |

Step 4: Repeat step 3 for each 'Base unit' and 'Rollup Unit'.