

2010

## **Workflow Instructions**

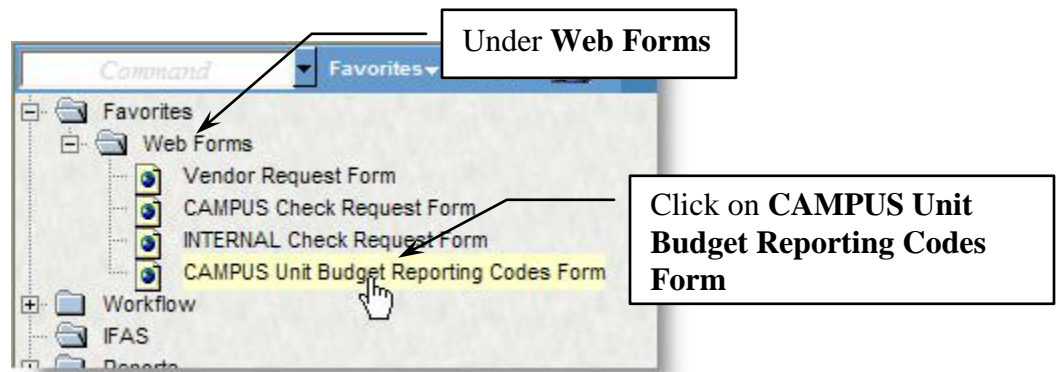
### **Electronic Unit Budget Reporting Code Request**

The Workflow Electronic Unit Budget Reporting (UBR) Request process enables a user to create/update a UBR Code from his/her desktop so that it is available as a dropdown option when they next create a check request using the Workflow Electronic Check Request Form.



**Please note:** There is a limit of 200 UBR codes for each *creator* (not unit). Use them wisely!

## Accessing the Form



Click on CAMPUS Unit Budget Request Form:

## Using the Form

The form (**Unit Budget Reporting Code Form**) will open with your user name and today's date filled in the appropriate fields. The fields marked in red are required and you will not be able to complete the form without filling in all required fields.

The screenshot shows the 'Unit Budget Reporting Code Form' from KU Endowment. The KU logo and 'The University of Kansas' are at the top left. The title 'Unit Budget Reporting Code Form' is at the top right. Below the title, there is a legend: '\* = Required Fields'. The form contains several fields: 'Date' (4/21/2010), 'Prepared By' (a blurred name), and '\*Phone' (9135881111). A callout box with an arrow points to the phone field, containing the text 'Enter your phone number (required)'. Below the phone field, there is a '\*Select:' section with two radio buttons: 'Create New UBR Code' and 'Update Existing UBR Code'. A callout box with an arrow points to these radio buttons, containing the text 'Choose to Create a new code or to Update an existing code.'. At the bottom, there is a dropdown menu labeled 'Your Available UBR Codes:' with the text 'Select One From Below' and a blue arrow icon.

## If creating a New UBR Code:

Your Available UBR Codes: Select One From Below

Enter New Code: \*Unit Select One From Below \*Code AA TEST 331.56 \*Description Test code added

Select One From Below  
School of Medicine

(max. 16 characters) (max. 48 characters)

Action Bar: Accept Clear

1. Select the **Unit** from the dropdown list . . .

2. Enter a **Code** of 16 characters or less . .

3. Enter a **Description** of 48 characters or less

*Hint:* You may drop down your list of current UBR codes to serve as examples.

Your Available UBR Codes: Select One From Below

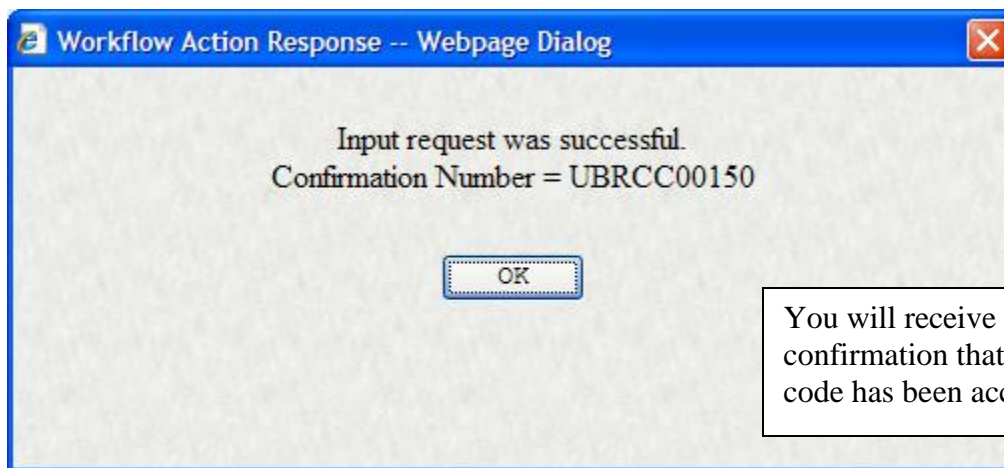
Enter New Code: \*Unit School of Medicine \*Code AA TEST 331.56 \*Description Test code added

(max. 16 characters) (max. 48 characters)

Action Bar: Accept Clear

1. **Review** your entries to be sure they are correct.

2. **Click** the pushpin next to **Accept** to finish the process.



You will receive a confirmation that the code has been accepted.

\*Select:  Create New UBR Code  Update Existing UBR Code

Your Available UBR Codes: Select One From Below

Select One From Below

AA TEST 331.56 Test code added - School of Medicine Status:A

AAA TESTING testing code added 4-20-10 - School of Medicine Status:A

AAAATESTING more test codes - School of Medicine Status:A

ANATOMY 1-11 Bruses Startup General Replaces Sarras - School of Medicine Status:A

Action Bar: Accept Clear

You may check the dropdown list of **Available UBR Codes** to see your changes.

## If updating an Existing UBR Code:

**Please note:** Only the description and/or the status of the code may be edited.

**\*Select:**  Create New UBR Code  Update Existing UBR Code

Your Available UBR Codes:

Step 1: Pick existing code to update (from above):

Code	Description	Unit	Status
AA TEST 331.56	Test code added - School of Medicine	School of Medicine	Status:A
AAA TESTING	testing code added 4-20-00 - School of Medicine	School of Medicine	Status:A
AAAA TESTING	more test codes - School of Medicine	School of Medicine	Status:A

Choose the code you wish to update from the **Your Available UBR Codes** dropdown.

Your Available UBR Codes:

Step 1: Pick existing code to update (from above):

Code	AA TEST 331.56	Description	Test code added	Unit	School of Medicine	Status	A
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Step 2: Enter values to update to: (only 'Description' and 'Status' can be modified):

The UBR code is parsed into sections and shown in these boxes.

Step 1: Pick existing code to update (from above):

Code	AA TEST 331.56	Description	Test code added	Unit	School of Medicine
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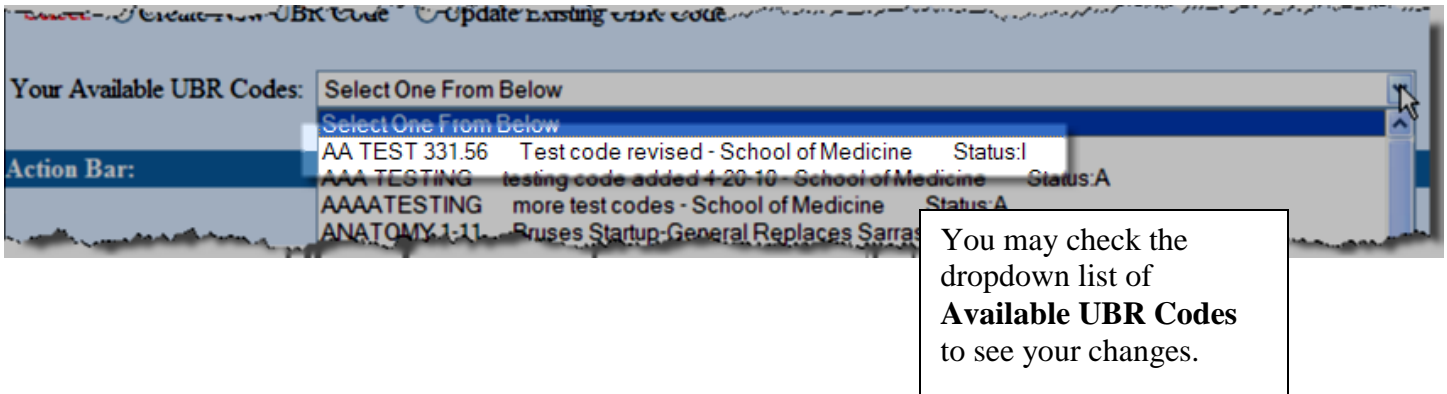
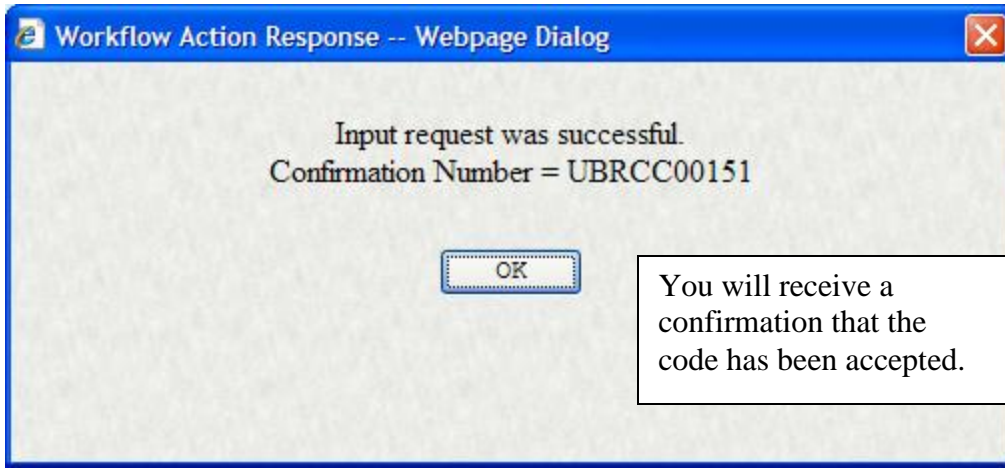
Step 2: Enter values to update to: (only 'Description' and 'Status' can be modified):

**\*Description**  **\*Status**  Active  Inactive  
(max. 48 characters)

Action Bar:

Enter a new **Description** and/or set the **Status**.

Click the pushpin next to **Accept** to finish the process.



When you have completed either a new code or a change to a code, you will also receive an email from the system:

