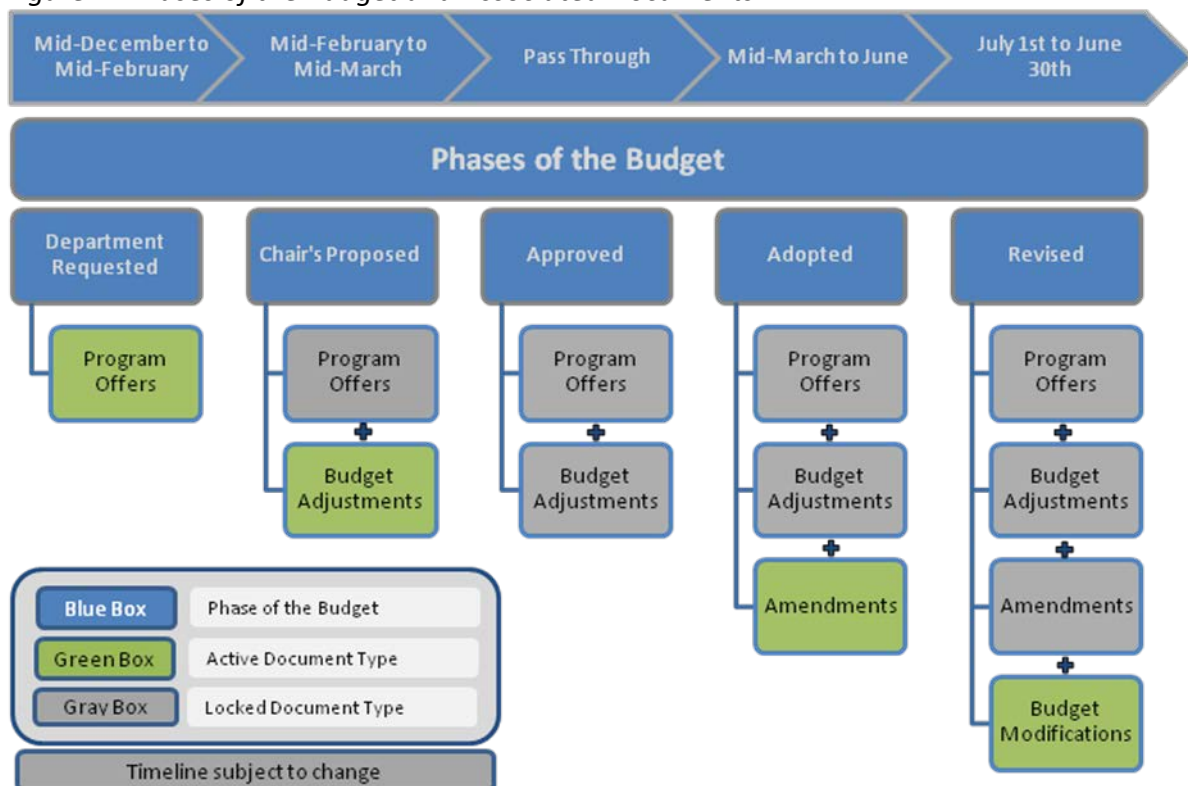


New Report for FY 2017: Exp/Rev Detail for Excel - All Stages

New report is similar to the existing Exp/Rev Detail for Excel but breaks internal logic and allows for more flexibility by user.

- Original Exp/Rev Detail for Excel allows user to pull data based on stage in the budget process.
 - Questica knows which documents to grab based on budget phase (see Figure 1)
- New Exp/Rev Detail for Excel- All Stages allows user to define *both the budget phase and the document stage*.
 - User can select any combination of documents by phase and stage, *including in-progress documents still in the Department Sandbox stage* (see Figure 2). Report can pull data that will never be part of the finished budget.
 - User should exercise caution when selecting data to make sure they are only selecting documents related to area of interest.
 - Still includes functionality allowing the user to select specific Four Digit Funds or Cost Elements.

Figure 1: Phases of the Budget and Associated Documents



- Before running new report, user should make sure that they are pulling data from the intended budget phase. Table 1 shows the Budget Phase associated with each document option for the report.
 - If documents have been promoted to new phase, the unpromoted documents are most likely no longer useful and could cause confusion if pulled into report output.

Table 1: Document Stages in Budget Process

| Document Stage | Budget Phase - In Progress |
|---|-----------------------------------|
| Program Offer - Department Sandbox | Department Requested |
| Program Offer - Department Requested | Department Requested |
| Program Offer - Budget Office Review | Chair's Proposed |
| Program Offer - Department Edit Proposed | Chair's Proposed |
| Program Offer - Budget Office Edit Proposed | Chair's Proposed |
| Program Offer - Proposed | Chair's Proposed |
| Program Offer - Approved | Approved |
| Program Offer - Pending Adoption | Adopted |
| Program Offer - Department Edit Adopted | Adopted |
| Program Offer - Budget Office Edit Adopted | Adopted |
| Program Offer - Adopted | Adopted |
| Program Offer - Revised | Revised |
| Budget Adjustment - Department Sandbox | Chair's Proposed |
| Budget Adjustment - Department Submit | Chair's Proposed |
| Budget Adjustment - Budget Office Review | Chair's Proposed |
| Budget Adjustment - Proposed | Chair's Proposed |
| Budget Adjustment - Approved | Approved |
| Budget Adjustment - Pending Adoption | Adopted |
| Budget Adjustment - Adopted | Adopted |
| Budget Adjustment - Revised | Revised |
| Amendment - Department Sandbox | Adopted |
| Amendment - Department Submit | Adopted |
| Amendment - Budget Office Review | Adopted |
| Amendment - Pending Adoption | Adoption |
| Amendment - Adopted | Adopted |
| Amendment - Revised | Revised |
| Budmod - Department Sandbox | Revised |
| Budmod - Department Submit | Revised |
| Budmod - Budget Office Review | Revised |
| Budmod - Pending Board Approval | Revised |
| Budmod - Revised | Revised |