University of Oregon, Office of Budget and Resource Planning

BEGINNING BUDGET APPLICATION
GENERALIZED BUSINESS RULES

Basic Organization

Budget data is organized under the following schema:

1. A "**section**" defines a grouping of budget line items.

2. Each section is assigned one "**delegate**" who is ultimately responsible to "**confirm**" that the section has been reviewed and is complete.

3. Sections are arranged into a hierarchical relationship with one another such that all sections (save for the top level section) have a "**parent section**." The hierarchy may contain any number of levels.

4. Parent sections are said to contain one or more "**subsections**." The delegate for a section that contains subsections is responsible to "**approve**" the reviewed work on each subsection.

Section Status

At any point in the process, a section may have one of the following states:

1. **Nominal** state—the section has not been viewed by the delegate and no work has been completed.

2. **Viewed**—the delegate has viewed budget data for the section.

3. **Modified**—the delegate has made changes to budget data for the section.

4. **Confirmed**—the delegate certified the section as reviewed and complete.

5. **Approved**—the delegate for the parent section accepted the confirmation of the subsection delegate.

6. **Declined**—the delegate for the parent section did not accept the confirmation of the subsection delegate.

7. **Re-viewed**—the delegate has viewed budget data for the section since the original work was declined for approval.

8. **Re-modified**—the delegate has made changes to the budget data for the section since the original work was declined for approval.

9. **Re-confirmed**—the delegate has confirmed the section as reviewed and complete since the original work was declined for approval.

Section Processing and State Changes:

There are only three basic steps for processing a particular section:

1. At any point prior to the confirmation of a section by the delegate, the section may be viewed and modified by the section delegate or the delegate of any parent section. When the section delegate first opens budget data for the section, the status changes to viewed. If and when the delegate makes changes to the budget data for the section, the status changes to modified.

2. A delegate must at least view budget data before confirming a section as reviewed and complete. After a section has been confirmed, the delegate may continue to view but can no longer modify the section. The delegate for the parent section may still view and modify the section.

3. After a section has been approved, the delegate for the parent section can no longer make changes to the section. If a section is declined for approval, the delegate for the section may once again make modifications to the section, as if the status had returned to the nominal state; the entire process essentially begins again. Before confirming the section again, the section delegate must make modifications to the budget data.