BUDGET OFFICE
Illinois State University

BUDGET CENTER ACCESS REQUEST FORM INSTRUCTIONS

The Budget Center Access Request form is used to request access to view the Budget Center reports and process budget transfers for specific funds, units and/or accounts. Once the form is submitted, it routes to the employee's supervisor for approval and to the Budget Office for processing.

FORM COMPLETION AND SUBMISSION

EMPLOYEE INFORMATION

Employee: Type name of employee for which Budget Center access is being requested (Last name, First name) or use one of the "lookups" as follows…

1. Enter the employee's ULID and click the [icon] icon, or

2. Click on the [icon] icon and do the following:
   - Type the employee's last name in the "Find" field and click "Enter"
   - Select the appropriate employee from the list returned
   - Click "OK"

Supervisor: Type the name of the employee's supervisor in the field (Last name, First name) or use the lookups previously described.

Department: Enter the name/number of the employee's department.

Types of access to request: Select the radio button to indicate the type of Budget Center access that's needed for the employee.

- Build New Profile – The employee does not currently have access to Budget Center (new employee or employee that does not already have access), the access they need is not similar to another employee's access (see Copy User), and they are not replacing an employee that had access to Budget Center (see Replace User)
- Copy User – Setting up employee with access that's the same as another employee's Budget Center access and budget transfer authority.
- Replace User – The employee is replacing another employee and needs the same access to Budget Center and budget transfer authority.
- Modify User – The employee currently has access to Budget Center, but changes to that access are required.

The type of access request selected will trigger additional fields to open in the Access Information section of the form.

ACCESS INFORMATION
See each type of Budget Center access request listed below with a list of the information required for the request to be processed.

Build New Profile
- Access Type – select Operating, Personnel or Both
- Effective Date – Enter the date that the employee's access to the Budget Center should be effective. The current date will automatically populate this field but if a different effective date is needed follow the instructions below.

    Eff Date: 2/18/2019 🔳

  - Click on the calendar icon
  - Select the date the employee's access should be effective

- Is Budget Transfer Functionality Needed? – No (default) or select Operating, Personnel or Both
- What access is needed? – List the Funds, Folder, Accounts, or Unit Ranges that the person should have access to in Budget Center. Be descriptive about what the employee will be doing within Budget Center.

Copy User

- Effective Date – Enter the date that the employee's access to the Budget Center should be effective. The current date will automatically populate this field but if a different effective date is needed follow the instructions below.

  Eff Date: 2/18/2019

  - o Click on the calendar icon
  - o Select the date the employee's access should be effective

- Provide name of the employee (Last name, First name) whose Budget Center access (Funds, Folders, Unit Ranges) you would like this employee's access to "mirror".
- The Budget Office will set the employee's access to the same accounts and access levels of the user listed but _does not_ remove access for the user whose access is mirrored.

Replaces User

- Effective Date – Enter the date that the employee's access to the Budget Center should be effective. The current date will automatically populate this field but if a different effective date is needed follow the instructions below.

  Eff Date: 2/18/2019

  - o Click on the calendar icon
  - o Select the date the employee's access should be effective

- Provide the name of the employee (Last name, First name) who this employee will be replacing
- The Budget Office will set the employee's access to the accounts and access levels of the user listed and _will also inactivate_ the replaced user's access.

Modify User

- Access Type – select Operating, Personnel, Both or Revoke Access
- Effective Date – Enter the date that the employee's access to the Budget Center should be effective. The current date will automatically populate this field but if a different effective date is needed follow the instructions below.

  - o Click on the calendar icon
  - o Select the date the employee's access should be effective

- Is Budget Transfer Functionality Needed? – No (default) or select Operating, Personnel, Both, Revoke Access
- What access is needed? – List the Funds, Folder, Accounts, or Unit Ranges that the person should have access to in Budget Center. Be descriptive about what the employee will be doing within Budget Center. If revoking access leave blank. The employee's access will be modified to what is listed.

AUTHORIZATION

Once the form has been completed, check the "I certify that I have authority…" box and click the "Submit" button.

This will submit the form for further approval by the employee's supervisor.

Once supervisory approval has been submitted, the Budget Office will process the request.

The departmental creator will receive an email to indicate that the request has been completed.

REQUIRED EDITS AFTER SUBMISSION

If the employee's supervisor or Budget Office determine that the request cannot be processed as submitted, they will "reject" the submission. Comments regarding the necessary edits can be provided by the supervisor or Budget Office and will be included in the "audit trail" at the bottom of the form. The request is sent back to the departmental creator for correction/re-submission or cancellation.

The departmental creator will receive a system-generated email indicating the request has been rejected. Using the link in the email, open the My Budget Office Forms Dashboard. The rejected request will be listed in the "Pending My Approval" section. Click the "edit" symbol for that request to re-open the form.

To re-submit:
- Enter necessary edits.
- Re-submit the request by once again selecting "I certify that I have the authority…" and click the "Submit" button.
- The request is then sent for supervisory approval and once approval has been provided will be forwarded to the Budget Office for processing.

To cancel:
- If the request is no longer needed, you may cancel it by selecting "This request can be cancelled…" and click the "Submit" button. The request will no longer be processed.

SUPERVISORY APPROVAL

Once the request has been completed and submitted by the departmental creator, approval by the employee's supervisor is required.

- The employee's supervisor receives a system-generated email indicating a request for Budget Center access has been submitted for their approval. Note: if the employee's supervisor is the President or a Vice President, the request will be forwarded directly to the Budget Office for approval and processing.
- Click the "My Budget Office Forms Dashboard" link in the email. The request will be listed under the "Pending My Approval" section. Click the "edit" symbol to open the form for review.
- Review the submitted request.

  - If edits are required, click the "This form cannot be approved as submitted" checkbox. An explanation may be entered in the box provided. This information will be viewable by all who have access to the form. Click "Submit".
    A system-generated email will be sent to the departmental staff member that created the request. They will open the form and enter the necessary edits and then re-submit the form for approval.

  - To approve the access as it's been requested, click the "I certify that I am the employee's supervisor and the employee should have the access shown above". Click "Submit".
    The Budget Office will receive a system-generated email indicating the Budget Center access request is approved and may be processed.

Authorization

☐ I certify that I am the employee's supervisor and the employee should have the access shown above.

☐ This form cannot be approved as submitted.

Note: If providing supervisor approval of the request via the Budget Center Access Request form is not possible (away from office/no access to VPN connection), an email may be sent to the Budget Office to indicate your approval. The Budget Office will save the email approval in the Budget Center Access Request system so that it's accessible in the audit trail and will move forward with processing the request.

QUESTIONS/ASSISTANCE

If you need assistance or have questions about completing the Budget Center Access Request Form please contact the University Budget Office via UniversityBudgetOffice@ilstu.edu or by phone at 438-2143.