

VIRGINIA TECH

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Office of Budget and Financial Planning

# ETF Request System

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## SYSTEM OVERVIEW

The ETF Request system is a web-based application designed for collection of equipment request data for submission and approval by the State Council of Higher Education for Virginia. This system is administered by the Office of Budget and Financial Planning.

## HOW TO

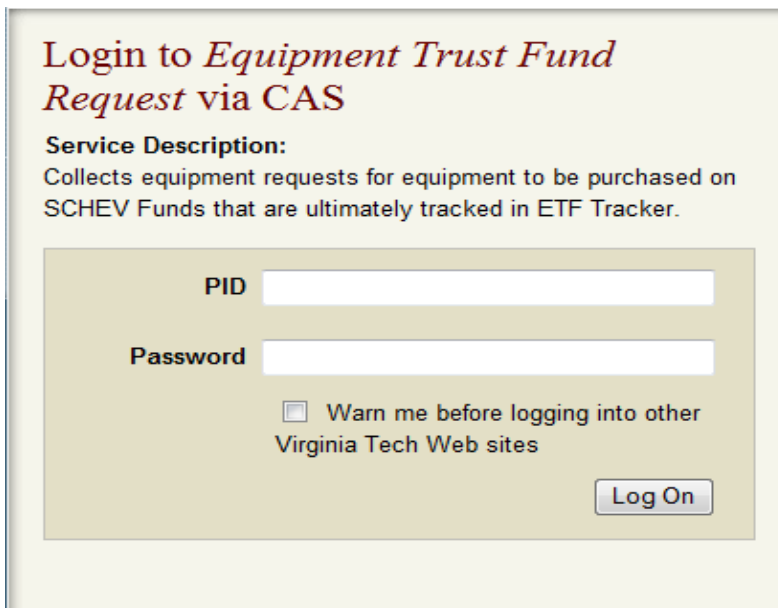
The following set of instructions will instruct the user on how to use the ETF Request System to create, modify, and delete equipment requests.

### Accessing the System

The ETF Request system can be accessed by clicking the Equipment Trust Fund link on the [Office of Budget and Financial Reporting](#) website or by typing the following URL directly into an Internet Explorer 5.5 or later browser session: [https://www.apps.obfp.vt.edu/etf\\_request/login.aspx?application\\_code=ETF](https://www.apps.obfp.vt.edu/etf_request/login.aspx?application_code=ETF). To access the system the user must have a current Virginia Tech PID and password and be a designated ETF Request System user.

Steps:

1. Navigate to the ETF Request System authentication page via one of the methods described above
2. Enter your Virginia Tech PID and password and press the Log On button



**Login to *Equipment Trust Fund Request via CAS***

**Service Description:**  
Collects equipment requests for equipment to be purchased on SCHEV Funds that are ultimately tracked in ETF Tracker.

PID

Password

Warn me before logging into other Virginia Tech Web sites

Log On

3. The Department Selection screen is displayed.

## Select the Desired Department

It is necessary to select the department for which the equipment is requested for. This is done at the time of system login or by performing the following:

1. Click the **Change Department** link for the navigation bar.
2. A dropdown list with the department(s) that the user has access to will be displayed.
3. Selected the desired department from the dropdown box.
4. Press the **Submit** button.
5. The add request screen will be displayed (Note: the Department in the header)

## Add New Request

To add a new equipment request:

1. Click the **Add New Request** link for the navigation bar.
2. Complete the following fields appropriately
  - a. Department – The department that is requesting the item.
  - b. On Behalf Of Department – The department that will procure the equipment. For example, this field could be used when a Dean's office requests equipment that will ultimately be procured by a reporting department. **Note:** This field need only be modified when the requesting and receiving departments are different.
  - c. Model – Provide a current model number for the requested equipment
  - d. Description – Provide a brief description of the equipment. Please remember that this description should be singular in nature (i.e. Computer, Autoclave, etc.)
  - e. Manufacturer – Provide the name of the manufacturer (not the vendor)
  - f. Unit Price – Provide an estimate of the cost for the requested equipment.
  - g. Quantity – Number of requested equipment.
3. Press the **Add Request** button.
4. User will be notified that the request has been successfully saved.

## Modify Previous Request

To modify a previously entered request:

1. Click the **Modify Previous Request** link for the navigation bar.

2. A list of equipment requests will be displayed in a tabular format.
3. Find the equipment request that you would like to modify and press the **Modify** link.
4. The equipment detail screen will be displayed with the requested information. Modify this information as needed.
5. Press the **Modify Request** button.
6. User will be notified that the request has been successfully modified.

## Delete Previous Request

To modify a previously entered request:

1. Click the **Modify Previous Request** link for the navigation bar.
2. A list of equipment requests will be displayed in a tabular format.
3. Find the equipment request that you would like to modify and press the **Delete** link.
4. Press the **Delete Request** button.
5. User will be returned to the requested equipment table for the selected department, verify that the deleted equipment is no longer present.

## Create Report

To view a printable list of the requested equipment perform the following steps:

1. Click the **Create Report** link for the navigation bar.
2. On the Report Creation screen, select the type of report you would like to create.
3. Select the format that you would like the report to be in (.pdf or.xls).
4. Press the **Download Report** button.

## Logout of the System

For security purposes, it is imperative that users properly logout of the system when he or she has finished entering ETF equipment requests. To do this:

1. Click the **Logout** link for the navigation bar.
2. Close your browser.

## CONTACT INFORMATION

The ETF Request System is administered by the Budget Office. Please refer to the following contact list when assistance is needed:

- For general policy related questions related to the current ETF phase contact **Christine Snider** at [sniderc@vt.edu](mailto:sniderc@vt.edu) or 540.231.7450.
- For help with technical problems contact **Brad Sumpter** at [bsumpter@vt.edu](mailto:bsumpter@vt.edu) or 540.231.2239