VT E&G BUDGET REQUEST APPLICATION USER GUIDE

DEC 2023
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Logging into the App

The VT E&G Budget Request App can be accessed using a computer or mobile device. You must be defined as an authorized user to access the app. Access has been established for fiscal officers of each senior management area, who can further delegate access to departmental users within their senior management area as detailed in this document. Contact information for the app administrators is included at the end of this document if additional assistance is needed.

Please note when accessing the app, you should not use Internet Explorer as your internet browser.

Copy and paste the following address into your browser:

http://www.apps.vpfin.vt.edu/e&g-budget.html

If you are not already signed on, you will be prompted to pick your account:

If not already logged into VT Office 365, you will then be prompted with the Login screen below. Enter your Hokies email and password and continue with 2-factor authentication.
Overview

The VT E&G Budget Request App has been updated to allow for the collection of budget requests and mid-year requests. The radio button shown below allows users to submit and review budget requests or mid-year requests by budget year. Currently, the functionality for mid-year requests is closed.

The system opens to the summary screen and the view is based on user roles.

User Roles

Your assigned user role defines the level of data that you can see and edit in the app. User roles are maintained by the app administrators. Requests for updates to these roles should be communicated to the appropriate administrator listed at the end of this documentation.

DeptEnterer

- Can create, edit, prioritize, and submit requests for their assigned department(s) for review by the respective senior management area.
- Can see all requests for their assigned department(s).
- Can run department level reports.

SMSubmitter

- Can activate department-level entry of requests or opt to enter requests for their department(s) at the senior management level (can do a combination of both).
- Can review, edit, and delete requests submitted by department(s) within their senior management area (SMA).
- Can create new requests for any department(s) within their SMA.
- Set requests prioritization at the SMA level prior to final submission.
- Can see all requests for their assigned senior management area(s) entered at the department level (Process Level 1 - Department Entry) and senior management level (Process Level 2 - SM Submission).
- Can run department level and senior management level reports.
Process Levels

The VT E&G Budget Request App has four process levels built into the system. Depending on the chosen data entry method - Department Entry or SM Submission, the application will step through 3 or 4 levels. These levels are:

Level 1: Department Entry
- Once the Department Entry function is enabled by a given senior management area, the process level moves from SM Submission (Process Level 2) to Department Entry (Process Level 1).
- DeptEnterer can create, edit, prioritize, and submit requests for their assigned department(s) to senior management. Once submitted, the requests are in SM Submission (Process Level 2). DeptEnterer cannot make any further edits once the requests are in SM Submission (Process Level 2) and would need to contact their respective SMA to have the requests returned for editing.

Level 2: SM Submission
- If Department Entry was selected and department(s) have submitted requests, the DeptEnterer can view its original department(s) submissions (if applicable).
- SMSubmitter can view, create, edit, and prioritize requests submitted by all department(s) under their SMA at this process level. When the last department submits to senior management, the process automatically moves to SM Submission (Process Level 2). At this point, the SMSubmitter can edit and prioritize at the SMA as needed then submit for Exec Review. Once submitted, the requests are at Exec Review (Process Level 3). The SMSubmitter cannot make any further edits once the requests are at the Exec Review (Process Level 3) and would need to contact their respective administrator to have the requests returned for editing.

Level 3: Exec Review (for administrative use only)

Level 4: Final Approval (for administrative use only)
- Upon completion of review and funding actions, the app will progress to Final Approval (Process Level 4).

When the app first opens, each senior management area is set to SM Submission (Process Level 2). From there, data entry can be delegated down to Department Entry (Process Level 1) or be retained at SM Submission (Process Level 2). Once the senior management area submits the final requests for their respective area, the requests are in Exec Review (Process Level 3). Upon completion of review and funding actions at the administrative level, the app will progress to Final Approval (Process Level 4). Approved funding actions will be officially communicated through the budget letter.
VT E&G Budget Requests Process Workflow

SM Submitter

Enable Dept. Entry

No

Yes (Some or All Departments)

SM Submitter Creates, Edits, Prioritizes Requests

SM Submitter Submits Requests to Exec Reviewer

Dept. Enterer Creates, Edits, Prioritizes Requests

Department Enterer Submits Requests to SM Submitter
Budget Request Summary Screen

The summary screen displays a listing of requests, status information and action buttons. Depending on the process level, the user can create and edit requests, prioritize the requests, and submit to the next level for review from this screen.

View by Options - This option is displayed at the SMSSubmitter level when Department Entry is enabled.

- **Senior Mgmt Submission** - Select this option to view all the requests submitted by department(s) for the selected senior management area. Requests are listed by department edit status, senior management level priority, department, and department priority. Note: Requests displayed at the senior management level will contain any edits made at Process Level “Senior Mgmt Submission” and may differ from the original request as submitted from the Process Level “Department Entry”. This view will also display any requests created at the Senior Mgmt level.

- **Department Entries** - Select this option to view requests as originally submitted by department(s). Based on user access, the drop-down box located in the upper left corner of the screen will open to senior management area(s) and department(s).
  - To view a specific request, click the request and a “read only” view of the Budget Request Data Entry screen will open for review.

Note: DeptEnterer(s) do not have access to the senior management submissions.
Below are the fields and descriptions displayed on the summary screen:

**Access Level**
- Your user role is listed under your account name in the upper right corner of the screen.

**Fiscal Year**
- Will initially be set to the current budget year in review. By changing this field users are allowed “read only” access to requests from the previous budget year.

**Budget vs. Mid-Year**
This radio button allows users to submit and review budget requests or mid-year requests by budget year. Currently, the functionality for mid-year requests is closed.

**Process Level and Department Status**
- Upon entering the app, in the upper right corner you will see the Process Level and Department Status. This will initially be set to Process Level “Senior Mgmt Submission.” If Department Entry is enabled and department(s) are still editing, the Process Level will be set to “Department Entry”. Department Status will be set to “Editing” and the Departments Still Editing will display the number of department(s) editing. When all editable department(s) have completed entry, the Process Level will return to “Senior Mgmt Submission” until the requests have been submitted, at which point the Process Level will display “Exec Review”.

**Senior Management**
- The drop-down box located in the upper left corner of the screen will open to your assigned senior management area(s). Depending on your user access, you can use the drop-down list to select and view senior management area(s) and departments you have access to view and edit.

**Priority Level**
- Changes to priority levels can be made by clicking in the orange box under “Priority” on the table, changing the number and clicking the floppy disk icon to save. If two requests have the same priority number, the box will turn red indicating an error. Priority numbers must be unique before they can be submitted to the next process level. The “Complete Editing” button for **DeptEnterer** and “Submit for Exec Review” button for **SMSubmitter** will be disabled until the priority conflict is resolved.
- All requests from departments will be loaded into the senior management table with the priority set to “99” and will be highlighted in light gray. **Any requests with a “99” priority will NOT be submitted for Exec Review.**
- When department entry is enabled, requests that are still being edited are highlighted in a darker shade of grey. These requests are “read-only.” They cannot be edited or prioritized at the **SMSubmitter** level until all department(s) have submitted.

**Creating New Request**
- By selecting the “Create New Request” button, users will be able to add a request.
Edit an Existing Request
- Selecting a specific request from a row in the table will open the data entry screen and will allow the details of the request to be edited.
- **SMSubmitter** can make edits to requests submitted by department(s). Please note that the original details entered during department entry are static and any changes made at the **SMSubmitter** level will not update in the department entry view.
- Once a user has submitted the request(s) to the next level for review, selecting the row on the table will open a “read-only” view of the requests and details cannot be edited.

Reset to Editing (SMSubmitter)
- Displays at the Department Entries view and only when the Dept Status is “Submitted”.
- Can be used to allow the department(s) to resume editing.
- If the Process Level is “Senior Mgmt Submission”, selecting this action will automatically move it back to Process Level “Department Entry”.

Move to Level 2 (SMSubmitter)
- Displays at the Department Entries view and only when the Dept Status is “Editing”.
- Can be used to force department(s) to submit requests to senior management.
- If the Process Level is “Department Entry” and this is the last department still editing, selecting this action will automatically move the Process Level to “Senior Mgmt Submission”.

Submit for Exec Review/Complete Editing
- Once all requests have been reviewed and are ready for submission to the next level,
  - DeptEnterer should select the “Complete Editing” button to submit the requests to the senior management level, and
  - SMSubmitter should select the “Submit for Exec Review” button to submit the requests for executive review.

Attachments
- The “Attachments” button will open a screen displaying attachments based on user access.

Reports
- The “Reports” button will allow users to run reports based on their user role and access.

Manage Entry
- Allows SMSubmitters to enable or disable Department Entry. The screen will lead to the “Manage Users” screen that will allow SMSubmitters to set up users and define department(s) access.
**Budget Request Details Entry Screen**

**Administrative SMSSubmitter View**

**Administrative DeptEnterer View**

**Note:** For DeptEnterer, the department field will not provide a dropdown menu and will populate with the current department selected from the summary screen. The department priority field is automatically set to the next available priority number and adjustments must be made on the summary screen.
Senior Management Priority (SMSubmitter)
- Displays the senior management level priority.
- When a new request is created, this field is automatically set to the next available priority number.
- This field is not editable. Adjustments to the priority levels must be made on the summary screen by the SMSubmitter. Adjustments made on the summary screen will remain displayed as the priority initially chosen by the department on the DeptEnterer screen.

Department
- If a user has access to multiple departments, then a drop-down list is provided to select the applicable department.

Department Priority
- Displays the department level priority. This field is not editable. Adjustments to the priority levels must be made on the summary screen by the DeptEnterer.

Do you have a Reallocation Strategy?
- Check the box below “Yes” if applicable. This will allow the budget and FTE reallocation fields to become editable. The “Reallocation Strategy” field will also become editable for administrative users. Academic users should describe the reallocation strategy in the investment narrative.
- Note, senior leadership is interested in understanding how reallocations are occurring within each unit. This functionality can be used even if the net request for new E&G resources is $0. Please see the following examples of reallocations strategies that are helpful to understand:
  - A request that requires salary for 2 positions, the unit can reallocate one position, requiring university support for one position.
  - A request that requires salary for 2 positions, the unit can reallocate two positions, requiring no new university support.

Do you have a prior commitment? (SMSubmitter)
- Check the box below “Yes” if applicable.

Title
- Enter the full title desired for this request.

Short Title
- Automatically populates as the Title is entered (25-character limit). May require updating since the short title of the request is used on the summary screen.

Initiative
- This drop-down allows the user to select a specific initiative that the request will support. If the request does not tie directly to any of the initiatives in the menu, leave the defaulted value in the drop-down as N/A.
Narrative (administrative users reporting to the EVPCOO)
- Provide a detailed explanation of the request (2,000 maximum character limit). Extensive explanations and supporting documents should be uploaded as attachments.
- Provide a description of your reallocation strategy. Field is only available for editing if the “Do you have a Reallocation Strategy” was marked “Yes.”

Narrative (academic users reporting to the EVPP)
- Provide a detailed explanation of the request.
- Describe how the request supports the strategic goals of the unit.
- Identify existing resources that will be used to support the request (if applicable). Note, if existing resources are being redirected to help fund this request, please use the budget/FTE reallocation fields accordingly.
- Describe ramifications if new funding is not provided.
- Supplemental documentation can be included as an attachment.

Financial Details for the request are entered in the table at the bottom of the screen. The table will automatically calculate fringe benefits.
- Expense Class - Select the applicable type of expense from the drop-down list: Staff, T/R Faculty, AP Faculty, Wage, Graduate Assistant, Operating Expense (various categories).
- Base or One-Time - Radio button defaults to “Base” for a new entry; move to “One-Time” if applicable.
- Budget Request - Enter the amount requested for this expense class. For any salary or FTE request, please include the requested amount without the fringes. The system will automatically calculate the fringe and graduate tuition based on FTE and/or the requested salary.
- Budget Reallocation - This field should only be used if a Reallocation Strategy was selected above. Enter the amount for this expense class that will be funded by a reallocation of existing resources, if applicable. Amounts will be saved as negative whether entered as a positive or negative.
- Budget Total - Displays the calculation of the budget request less the budget reallocation.
- FTE Request - Enter the associated FTE amount, if applicable.
- FTE Reallocation - This field should only be used if a Reallocation Strategy was selected above. Enter the FTE for this expense class that will be funded by a reallocation, if applicable. Amounts will be saved as negative whether entered as a positive or negative.
- FTE Total - Displays the calculation of the FTE Request less the FTE Reallocation.
- Item Description - Enter a description for this expense class.
- Calculated Fringes & Tuition - By clicking the “Show Details” in orange above the Request Total, the fringe amounts by Expense Class line will display. Click “Hide
Details” to minimize this information.

- **Request Total** – The bottom line of the table will display the total of the request including system calculated fringes.

- **Removing an Existing Expense Class line** – Click the row of the expense class and then click the trashcan icon and then click the trashcan icon again to confirm the deletion.

**Action Buttons**

- **Create New Line Item** – Opens a new line on the table for expense class details to be entered. This will allow for multiple expense classes to be added to one request.

- **Save All Changes** – Saves all changes made on the Data Entry screen.

- **Delete Request** – Deletes the request fully from the system. You will be asked to confirm the deletion.

- **Undo Changes** – Cancels all unsaved changes made on the Data Entry screen.

- **Cancel & Close** – Will cancel all unsaved changes made on the Data Entry screen and return you to the Summary screen.

- **New Request** – Will open a new Data Entry screen.

- **Home** – Returns you to the Summary screen.

- **Attachments** – Opens a screen displaying attachments based on user access.

- **Reports** – Opens a new window that allows users to run department level reporting based on their user access.
Attachments Screen

From the top of the screen, select “Attachments.” This screen displays all attachments based on your user access.

Attachment Listing by Request
- A listing of all requests will be displayed based on user access.
  - A paperclip icon will display next to any request that has an attachment.
  - Selecting a request from the list will display a listing of associated attachments on the right.

Uploading a File
- Click the “Browse to Upload File” button at the specific attachment level.
- Note: The file select dialog box opens to search for Images.
- Be sure to change “Image Files” to “All Files” at the bottom right of the screen.
- Select the desired file and click the “Open” button.
- Click “Save” or “Cancel” to skip upload.
- The uploaded file will appear in the list of attachments.

Download a File
- Click the down arrow next to the filename in the attachments list then save to your desired location.

Deleting a File
- Click the trashcan icon next to the filename in the attachments list and then click the trashcan icon again to confirm the deletion.
- Click the “X” next to the trashcan icon if you decide not to delete the attachment.
Action Buttons

- **Home** - Returns you to the summary screen.
- **Reports** - Opens a new window that allows users to run reports based on their user role and access.
From the top of the screen, select “Reports”. Once selected a new tab will open, allowing users to run department level and senior management level reporting based on user access. Use the drop-down menu to select the Fiscal Year and Report Type.

Note: DeptEnterer can only access departmental level reporting.

**Budget vs. Mid-Year Cycle**
- This radio button allows users to pull reporting for budget requests or mid-year requests by budget year. Currently, the functionality for mid-year requests is closed.

**Submission - All Senior Management**
- This report will provide details for all senior management level requests as submitted for Exec Review and will exclude “99” priorities based on user access. This summary report provides base funding, one-time funding, reallocation, and net request details. This report will list the requests in order of senior management priority level.

**Submission - Selected Senior Management**
- When running this report, you will need to select the senior management area from the drop-down list. This report will provide details for all senior management level requests as submitted for Exec Review and will exclude “99” priorities based on user access. This summary report provides base funding, one-time funding, reallocation, and net request details. This report will list the requests in order of senior management priority level.

**Priority Summary - All Senior Management**
- This report will provide details for all senior management level requests based on user access, including “99” priorities. This summary report provides base funding, one-time funding, reallocation, and net request details. This report will list the requests in order of senior management priority level.

**Priority Summary - Selected Senior Management**
- When running this report, you will need to select the senior management area from the drop-down list. This report will provide details for all senior management level requests based on user access, including “99” priorities. This summary report provides base funding, one-time funding, reallocation, and net request details. This report will list the requests in order of senior management priority level.

**Priority Summary - All Departments**
- This report will provide details for all department level requests based on user access.
This summary report provides base funding, one-time funding, reallocation, and net request details. This report will list the requests in department level priority.

Priority Summary - Selected Department
- When running this report, you will need to select the senior management level and department from the drop-down list that you want to view. This report will provide details for all department level requests based on user access. This summary report provides base funding, one-time funding, reallocation, and net request details. This report will list the requests in the department level priority.

Snapshot - All Senior Management
- This report provides a printable version of the Budget Request Data Entry Screen of all senior management area requests based on user access and will exclude “99” priorities. Snapshot - Selected Senior Management
- When running this report, you will need to select the senior management area from the drop-down list. Report provides a printable version of the Budget Request Data Entry Screen. This report will exclude “99” priorities.

Snapshot - Selected Senior Management Request
- When running this report, you will need to select the senior management area and specific request from the drop-down list. Report provides a printable version of the Budget Request Data Entry Screen.

Snapshot - Selected Department
- When running this report, you will need to select the senior management area and department from the drop-down list. Report provides a printable version of the Budget Request Data Entry Screen.

Snapshot - Selected Department Request
- When running this report, you will need to select the senior management area, department, and specific request from the drop-down list. Report provides a printable version of the Budget Request Data Entry Screen.

Senior Management Editing Status
- This report provides a listing of senior management process levels, details on which senior management areas have allowed department entry and department editing statuses.

User Access - Selected Area
- When running this report, you will need to select the senior management area from the drop-down list. This report provides a listing of all user access including access type, senior management area and department details.

The printing function from this screen has not been formatted. Once a report is generated, use the floppy disk icon from the ribbon on the top of the report to export the report to an Excel, Word, or PDF file. If formatting issues are encountered with a PDF file, export to Word or Excel to adjust as needed before printing or saving the file.

Once you have completed running reports, close this tab to return to the VT E&G Budget Request App.
Manage Entry

From the top of the **SMSubmitter** summary screen, select “Manage Entry”. To use the Department Entry feature, click the “Enable Department Entry” button. Once enabled, you can define which department(s) can enter requests by checking or unchecking the “Entry Allowed” box located to the right of each department. Select “Disable Department Entry” to turn department entry off for all departments at the senior management level.

When “Entry Allowed” is checked for a department, the Process Level will automatically be moved to “Department Entry”.

If “Entry Allowed” is unchecked for all departments, the Process Level will automatically be moved to “Senior Mgmt Submission”. Note: Once a department has created requests at the department level, you will not be able to uncheck the “Entry Allowed” box. At this point, the department requests will need to be submitted or deleted if you wish to disable department entry.

Please note that these settings will apply for budget and mid-year submissions.

**Action Buttons**
- **Home** - Returns you to the summary screen.
- **Attachments** - Opens a screen displaying attachments based on user access.
- **Reports** - Opens a new window that allows users to run reports based on their user role and access.
Manage Users

From the top of the SMSSubmitter summary screen, select “Manage Entry”. To use the Department Entry feature and setup user access, click the “Enable Department Entry” button and then click the “Manage Users” button.

To Add a User
- Click the “Plus” sign and enter the user’s Hokies Email Address, Last Name and First name. The Access Role will be set to DeptEnterer, and this field is not editable. Then click the floppy disk icon to save.
- After saving, a new window will open allowing you to set up the specific department(s) the user will be able to access. Click the “Plus” sign, select the specific senior management area. Then select “All Depts” or select the specific department(s) and click the floppy disk icon to save. If the user should have access to multiple departments, but not all, repeat the prior steps. Once all senior management area(s) and department(s) have been set, click the “Back to User List” button to return to the Manage User Access screen.

Making Changes to User Access
- Updates to User Access can be completed by clicking the row of the user and clicking the “Unit Access” button to the right of user’s name. A new window will open that will allow you to adjust the specific department(s) the user will be able to access.
- To add department(s), click the “Plus” sign, select the specific senior management area. Then select “All Depts” or select the specific department and click the floppy disk icon to save.
- To remove department(s), click the trashcan icon next to the department name and then click the trashcan icon again to confirm the deletion. Click the “X” next to the trashcan icon if you decide not to delete this access.
- Once all senior management area(s) and department(s) have been set, click the “Back to User List” button to return to the Manage User Access screen.
To Delete a User

- To remove access, click on the row of the user, then click the trashcan icon next to the user’s name and then click the trashcan icon again to confirm the deletion.
- Click the “X” next to the trashcan icon if you decide not to delete the user.

Action Buttons

- **Home** - Returns you to the summary screen.
- **Attachments** - Opens a screen displaying attachments based on user access.
- **Reports** - Opens a new window that allows users to run reports based on their user role and access.
**Refreshing the App**

The app can be refreshed at any time by clicking the circle arrow located to the left of the Budget Request Summary Title located on the upper left side of the summary screen.

![Image of app refresh button]

**Logging Out**

To sign out, click your account information in the upper right corner and click “Sign out.” Note that this will sign you out of your online Microsoft 365 account. Please be advised that you should save your work often.

**Questions**

Questions or access related requests should be sent to the following app administrators:

<table>
<thead>
<tr>
<th>Administrative users reporting to the Executive Vice President and Chief Operating Officer (EVPCOO)</th>
<th>Melissa Nipper (<a href="mailto:mnipper@vt.edu">mnipper@vt.edu</a>), or Debbie Greer (<a href="mailto:greervt@vt.edu">greervt@vt.edu</a>)</th>
</tr>
</thead>
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<tr>
<td><strong>OR</strong></td>
<td><strong>OR</strong></td>
</tr>
<tr>
<td><strong>Academic users</strong> reporting to the Executive Vice President and Provost (EVPP)</td>
<td>Cindy Spangler (<a href="mailto:cspangle@vt.edu">cspangle@vt.edu</a>), or Brad Sumpter (<a href="mailto:bsumpter@vt.edu">bsumpter@vt.edu</a>)</td>
</tr>
</tbody>
</table>