Quick Guide: Budget /RBC System Online Access Request Form

To Request Access:

Go to [www.budgetoffice.arizona.edu > Forms and Resources > Budget System Access Request Form (Completed Online)].

1. The Screen defaults to Current User View. The view provides an overview of the logged in user’s existing access to the Budget/RBC System.
2. To Request/Change the users access click on the edit current user tab.

- **Change to Inactive** to remove access to all departments
- **Update Phone, Email, Address** (Updates Budget System Only)
- **Changes User Rights** to the Budget System
- **Changes User Rights** to the RBC System
- **Enter 4 Digit Budget Dept** to add access and uncheck Active Box to deactivate
- **Users RBC Approval Authority** (uncheck to remove)
- **Select Department Approvers Name** to email the request for approval
- **Users Authority** to provide access to other users to the Budget/RBC system (uncheck to remove)

Update the request and choose the name of the departmental approver in the ‘Select Name of the Department Approver to send Email’ drop down list. Click on the ‘Submit and Email to Department Approver’ button. The request is sent to the department approver in the form of an email. The department approver verifies the request and submits the request for final approval to the Budget Office via the ‘Submit and Email to Budget Office Approver’ button. The requestor is notified by email by the Budget Office approver upon approval of the access request.

3. To request/modify/delete access for other users: The View/Edit other Users tab is visible to users with authority to ‘Provide Access to Other Users’ to the Budget/RBC system. Use the search options to find an employee or click emplid link to view that emplid’s view. The approval process is the same as the previous step.
<table>
<thead>
<tr>
<th>USER STATUS</th>
<th>ACTIVE</th>
<th>DOC. STATUS</th>
<th>APPROVED</th>
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<tbody>
<tr>
<td>NAME</td>
<td>BHAT, RAVINDRA K</td>
<td>EMPLID</td>
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</tr>
<tr>
<td>DEPT</td>
<td>9201 - BUDGET OFFICE</td>
<td>PRIMARY ADDRESS</td>
<td>P0 BOX 210066</td>
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<tr>
<td>PRIMARY EMAIL</td>
<td><a href="mailto:ravindra@email.arizona.edu">ravindra@email.arizona.edu</a></td>
<td>TELEPHONE</td>
<td>(520)621-9163</td>
</tr>
<tr>
<td>ADDITIONAL EMAIL</td>
<td>ADDITIONAL ADDRESS</td>
<td>ADDED</td>
<td></td>
</tr>
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</table>

**USER ROLE:**
- BUDGET SYSTEM: READ ONLY
- PRIMARY DEPT: RBC SYSTEM
- CREATE RBC: (NO EDIT)

**ACCESS STATUS:**
- CREATE DATE: 12-MAY-2015
- DEPT APPROVE: 18-MAY-2015
- BUD APPROVE: 18-MAY-2015
- LAST EDIT: 18-MAY-2015
- INACTIVE DATE: INACTIVATOR

**SEARCH**

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**USERS IN BUDGET DEPT (9201) WITH ACCESS TO THE BUDGET/RBC SYSTEM**

<table>
<thead>
<tr>
<th>EMPLID</th>
<th>LAST NAME</th>
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<td>10997784</td>
<td>BEJARANO</td>
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<td>11007435</td>
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<td>MARIO R C</td>
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<td>01269947</td>
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<td>009997923</td>
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<tr>
<td>010861122</td>
<td>PERRY</td>
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<tr>
<td>168886334</td>
<td>QUIGLEY</td>
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<td>12709183</td>
<td>WHISMAN</td>
<td>KATHRYN E</td>
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**USERS IN BUDGET DEPT (9201) WITH NO ACCESS TO THE BUDGET/RBC SYSTEM**

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<tr>
<th>EMPLID</th>
<th>LAST NAME</th>
<th>FIRST NAME</th>
<th>NAME</th>
<th>BUDGET DEPT</th>
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<td>12006441D</td>
<td>NICHOLL</td>
<td>JAIME M</td>
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Extended Instructions: Budget /RBC System Online Access Request Form

The Budget /RBC System Online Access Request Form is used to request access to the Budget System. This form is available for new and existing Budget System users to request access to the Budget/RBC System to View Budgets, Create New or Edit Existing Lines, and Create/Edit/View RBCs for their allowed departments. The Online Access Request form and any User data provided or modified, such as emails, departmental addresses and telephone numbers are strictly limited to the Budget/RBC System and will not change or alter user information in any other system.

Based on the user’s existing access rights, the home screen has two tabs or three tabs.

1. **Current User View**
2. **Edit Current User**
3. **View/Edit Other Users**

Users authorized to request/modify other users’ access will see three tabs. New Users (requesting access for the first time) and users not authorized to change other users will see tabs 1 and 2.

1. **Current User View Tab:**

The Current User View screen is divided into 6 sections and the Edit Current User Screen into 5 sections:

A. User information: Logged in user’s information
B. User Role: Logged in user’s access level to the Budget/RBC System
C. Access Status: Access approval dates and approver’s names
D. User Comments: User notes and justification
E. Users Active Departments: Budget Departments the user has access to

### Table:

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<tr>
<th>Active</th>
<th>DeptID</th>
<th>Access</th>
<th>Dept Name</th>
<th>Address</th>
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<th>COO/DA/VP Auth</th>
<th>RP Auth</th>
<th>Access Provider</th>
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</tr>
</tbody>
</table>

**Document Tracking:**

- INITIATED: BHAT, RAVINDRA K
- IN DEPT: BHAT, RAVINDRA K (04-NOV-2015)
- IN BUDGET: BHAT, RAVINDRA K (04-NOV-2015)
- APPROVED: BHAT, RAVINDRA K (04-NOV-2015)
F. Access Form Tracking: Tracking the Access Request Form

2. **Edit Current User Tab:** provides the user the opportunity to edit certain parts of the user’s data and authorizes/unauthorizes access to Budget Departments in the Budget/RBC System.

**Section A: User information:**

The user status drop down default is ‘ACTIVE’. Changing the status to INACTIVE deactivates the user’s current access. The User information, primary email and primary address, as seen on this screen - is the header information that appears on an RBC. The primary email is also used for routing the Online Access Form.

**Section B: User Role:**

User role: The user role sets the access to Budget System (View Departmental Budget/ Edit or Create New Lines) and RBC System (Create/View/Edit RBC)

**User Role - Budget System:**

- **Inactive:** No Access to any Budget Departments in the Budget System
- **Read Only Primary Dept:** Read only access to the User’s Current (primary/home) department
**Budget Level**: Budget Office Only

**Create Edit Lines Multiple Departments**: This level of access is also called ADMIN ACCESS. Admin Users can view multiple departments and can create line in the Budget System for all the departments they have access to.

**View Only Multiple Dept**: Users have View Only Access to multiple Budget departments.

**View Only All Dept**: Users have View Only Access to all Budget departments.

**User Role - RBC System**:

**Inactive**: No access to the RBC System

**Create RBC (No Edit)**: Create RBC to the User’s Current (primary/home) Department

**Budget Level**: Budget Office Only

**RBC View/Edit Multiple Departments**: This level of access is also called ADMIN USER ACCESS. Admin Users can edit/cancel RBC’s they created or created by all users in departments they have access. Admin Users can edit/cancel RBC’s as long as they are in the ‘submitted’ status.

**RBC View Only Multiple Dept**: Users can View only (cannot create or edit) RBC’s created by other users in multiple Budget departments they have access to.

**View Only All Dept**: Users can View only (cannot create or edit) all RBC’s in all Budget departments.

**Section C: Access Status**:

Displays the date and name of the user’s access approvers.

**Section D: User Comments/Justification**:

User edited notes for reference to approvers and future reference.
Section E: User’s Active Departments:

Permits the user to add, remove access to Budget Departments. The user enters the deptids of the Budget Departments they need access to. To request/provide access to a Budget department enter the 4 digit deptid. To deactivate access simply uncheck the Active box next to the deptid (unchecking the signature authority boxes or the access provider box is not required).

Signature authority: The user can also choose the signature authority level for RBC approval – the signature authority will be used for the future online RBC approval process. Please see the example with the RBC Signature section provided after the Access Provider Section.

Access Provider: Checking the Access Provider box provides the user the authority to grant access to other users to that Budget Department.

Click on the (+) button to add more rows to the form.

There are 3 levels of Signature required on an RBC - Department, College/Division and Vice President. Based on the Departmental/College requirements for RBC Approval – any RBC created will be forwarded by the creator to the Department Approver. The Department Approver forwards the RBC to the College/Division approver for approval and the College/Division approver forwards the RBC to the VP for approval. The VP then forwards the RBC to the Budget Office for Budget office approval.
Example:

<table>
<thead>
<tr>
<th>Dept ID</th>
<th>Existing</th>
<th>Address</th>
<th>Dept Auth</th>
<th>Col/Div Auth</th>
<th>VP Auth</th>
<th>Access Provider</th>
<th>Last Updater Name</th>
<th>Last Update Date</th>
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<tbody>
<tr>
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<td></td>
<td>Bhat, Ravindra K</td>
<td>04-NOV-2015</td>
<td></td>
</tr>
</tbody>
</table>

Dept 0101:

Signature authority: In the example above the user has Active access to dept 0101. The user has DEPT, COL/DIV and VP signature authority to an online RBC (all the boxes are checked). The signature authority coincides with the signatures required on an RBC. An RBC created by any user with access to dept 0101 can be approved by this user and forwarded to the Budget Office for final approval.

Access Provider: The user can also grant access to other users who request access for dept 0101 (Access Provider box checked).

Dept 3301:

The user has Active access to dept 3301. However, the user does not have any signature authority. Since 3301 is the primary department of this user, the RBC created by this user has to be approved by users who have dept level signature authority to dept 3301. Also, an RBC created by any user in 3301 will not be forwarded to this user for approval.

Access Provider: The user cannot grant access to other users who request access for dept 3301 (Access Provider box unchecked).

Section F (only on edit screens): Access Form Forwarding:

Once the Request form is completed, the user forwards the request form for departmental approval. The email drop down list is populated with names of all authorized users who have ‘Access Provider’ rights to the departments access is being requested for. The Approval form is forwarded by clicking on the ‘Submit and Email to Department Approver’
Section G: Access Form Tracking:

Provides tracking information of the approver name/time the online access request form is forwarded to.

3. View/Edit Other Users Tab:

The View/Edit Other Users tab is visible only to users with ‘Access Provider’ authority. The search function helps to look up users. The list is divided into two sections, Users who have access to the Budget/RBC Systems and the users that do not have access but for whom access can be requested.