In an effort to assist Department Chairpersons and other financial managers and provide up-to-date information on the status of their budgets, the Budget Office has developed a wide array of Business Intelligence (BI) reports which are available on the web. These reports can be accessed on-demand, are user-friendly, and easy to run. All reports created by the Budget Office are located in the ESS Portal under the Business Intelligence tab on the User Reports screen.

In order to access these reports, you will need to have access to SAP Finance, Business Intelligence and the ESS Portal.

**Arranging for Access to the BI on the Web and SAP-FI System**

1. Complete a “Faculty/Staff Account Request Form,” which can be obtained at the following web site:
   A. On MU home page [www.millersville.edu](http://www.millersville.edu), use the site index to
   B. Search for Information Technology
   C. Select Requests & Forms on the left in the blue area
   D. Select Forms – Faculty/Staff Account Request Form
E. Complete form and be sure to select: SAP, Banner and Brio

Authorization Information

- First Name:
- Last Name:
- Telephone: (e.g. 123-456-7890)
- Email Address:

New Account Information

- Type of Account:
- Full Name: (e.g. John A. Doe)
- M-Number:
- Job Title:
- Telephone: (e.g. 123-456-7890)
- Department:
- Campus Address:

Computer Information

- Computing Platform:
- Email Access:
  - Does this account require email access? Choose one:

Additional Applications:

- SAP (PASSHE)
- Banner
- Brio
- Cascade Server (CMS)

SAP Finance Modules

- Finance
- Data/Warehouse
- Both

Banner Modules

Access to Banner Accounts Receivable, Alumni, and Financial Aid must be requested through the appropriate department's Banner Security Administrator

- Finance
- Student
- Both

1. To complete a Banner Finance request, a Banner Finance Security form must be completed and sent to the Accounting Office. (This form can be found in Outlook at: Public Folders / All Public Folders / Accounting Office / Forms / CICS Security form.doc)
2. To complete a Banner Student request, a memo or email must be sent to the Registrar's Office

Submit Request
F. The following window will open. Select Both for the SAP Finance Module and Banner Modules

- **SAP Finance Modules:**
  - Finance
  - DataWarehouse
  - Both

- **Banner Modules:**
  - Finance
  - Student
  - Both

1. Access to Banner Accounts Receivable, Alumni, and Financial Aid must be requested through the appropriate department’s Banner Security Administrator.
2. To complete a Banner Finance request, a Banner Finance Security form must be completed and sent to the Accounting Office. (This form can be found in Outlook at: Public Folders / All Public Folders / Accounting Office / Forms / BCS Security Form.doc)
3. To complete a Banner Student request, a memo or email must be sent to Rachael Wyward in the Registrar’s Office.

G. Click Submit Request

2. Complete a “SAP-FI Access Request Form,” which can be found on the Budget Office Website under Forms.

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**Budget Training**

After the Budget Office has set up the appropriate security clearance, you will be contacted to determine your training needs. The training session will generally be held in your office or Boyer training room 235. Many department chairpersons have found it useful to have department secretaries, assistant chairpersons, and other representatives trained in the use of SAP Finance and BI reporting via the web. In addition, refresher training is available to anyone who has access to the SAP Finance System or BI on the web by placing a request with the Budget Office.
If, for any reason, responsibility for an account changes from one financial manager to another (e.g., Chairperson election), or if a change in support staff or other position takes place which will have an effect on who should have access to the SAP Finance system, please notify the Budget and Accounting Offices.

Department Chairpersons and Financial Managers should refer to the Procedure Manuals section of the Budget Office website for complete information regarding budget reporting, SAP navigation, chart of accounts, budget procedures, budget transfers and SAP on-line reporting. The budget procedures manual contains information about pool budgeting versus line item budgeting, Academic Affairs contracted maintenance budgets, Academic Search budgets, equipment budgets, Revenue Sharing/Indirect Cost budgets, etc. The chart of accounts document provides a listing and definition of revenue, expenditure and budget reserve accounts. The Budget Office website can be found at: http://www.millersville.edu/budget

In an effort to provide concise, one page reference guides for the most common financial user transactions, the Budget Office has created a series on “How To” instructions. These guides can be found on the Budget Office home page as indicated to the right.

We look forward to working with you and assisting you with your budgeting responsibilities!