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, use the Site Index to search for Information Technology
   b. Select Forms on the left in the blue area, then Faculty/Staff Account Request Form
## Account Request Form

Please fill out all appropriate information and click the SUBMIT button at the bottom. Your request will be automatically sent and processed.

Any questions/problems can be directed to the Help Desk (717) 871-2371

Fields labeled with * are required for submission.

### Authorization Information

<table>
<thead>
<tr>
<th>* First Name:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>* Last Name:</td>
<td></td>
</tr>
<tr>
<td>* Telephone:</td>
<td></td>
</tr>
<tr>
<td>(e.g. 123-456-7890)</td>
<td></td>
</tr>
<tr>
<td>* Email Address:</td>
<td></td>
</tr>
</tbody>
</table>

### New Account Information

<table>
<thead>
<tr>
<th>* Type of Account:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>* Full Name:</td>
<td>(e.g. John A. Doe)</td>
</tr>
<tr>
<td>M-Number:</td>
<td></td>
</tr>
<tr>
<td>Job Title:</td>
<td></td>
</tr>
<tr>
<td>Telephone:</td>
<td></td>
</tr>
<tr>
<td>(e.g. 123-456-7890)</td>
<td></td>
</tr>
<tr>
<td>* Department:</td>
<td></td>
</tr>
<tr>
<td>Campus Address:</td>
<td></td>
</tr>
</tbody>
</table>

### Computer Information

| * Computing Platform: |   |

### Email Access

Does this account require email access? Choose one

### Additional Application(s)

- SAP (PASSHE)
- Banner
- Brio
- Cascade Server (CMS)
f. The following window will open. Select Both for the SAP Finance Module and Banner Modules

![SAP Finance Modules and Banner Modules]

1. Access to Banner Accounts Receivable, Alumni, and Financial Aid must be requested through the appropriate department's Banner Security Administrator.
   - Finance
   - Student
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 / Accounting Office / Forms / BCS Security form.doc)
3. To complete a Banner Student request, a memo or email must be sent to the Registrar's Office.

![Submits Request button]

g. Click Submit Request

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

![Forms panel]

- Budget Transfer Request
- SAP-FI Access Request
Budget Training

After the Budget Office has set up the appropriate security clearance, you will need to schedule a training session which will 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 SAP Business Intelligence (BI) Reporting Training Manual for complete information regarding budget reporting. In addition, the SAP Finance Information section of the Budget Office Website is available for information regarding SAP navigation, chart of accounts, budget procedures, budget transfers and SAP on-line reporting. This 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. It also provides a listing and definition of revenue, expenditure and budget reserve accounts. These manuals can be obtained at the following web site: http://www.millersville.edu/budget/ under Procedures Manuals (See Below).

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