

## BUDGETING BASICS – GETTING STARTED!

### Contacts



#### **Budget Office:**

Tammy Aument-Martin	Budget Director	Ext. 4091
Neill Good	Budget Analyst	Ext. 4090
Gladys LaPorte-Rodriguez	Fiscal Technician	Ext. 4092

#### **Accounting Office:**

Debee Ordway	Controller	Ext. 4088
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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 “**Submit A Help Desk Request,**” 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 search for IT Technical Assistance Center
  - b. Click on the Submit A Help Desk Request, then login to myVille
  - c. Click on Submit A Request

The image shows two overlapping screenshots of the Millersville University website. The left screenshot shows the 'Site Index' page with a search filter by letter 'I' and a list of links including 'IT Technical Assistance Center', which is circled in red. The right screenshot shows the 'Help Desk' page with a 'Submit A Help Desk Request' button circled in red, and a 'Submit a Request' button at the bottom also circled in red. The Millersville University logo is visible at the bottom of the right screenshot.

d. The following window will open. Fill out all required fields and submit the form.

## Submit a Request

### Request Details

Request user \*

Gladys LaPorte-Rodriguez

(P:) 717 8714092

Ticket Title \*

Description \*

Building

DILWO

Room Number

Schedule Date

Attachments

[Select Attachments](#) or drag and drop files to here

Main Asset

none

[Cancel](#)

[Submit](#)

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

## Forms

Budget Home > Forms

- Budget Home
- About Us
- Staff
- Budget Issues
- Project Resource Requests
- Budget Transfer Request
- Forms**
- Procedure Manuals

### Available Forms

- 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 *Business Intelligence (BI) Training Documentation* for complete information regarding budget reporting. In addition, the *SAP-Finance Training Manuals* section of the Budget Office Website is available for information regarding SAP-FI Navigation, SAP Chart of Accounts, and Budget Procedures. These manuals 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).

**Procedure Manuals**

Budget Home > Procedure Manuals

Budget Home  
About Us  
Staff  
Budget Issues  
Project Resource Requests  
Budget Transfer Request  
Forms  
**Procedure Manuals**

**SAP-FI Training Manuals**

- [SAP-FI Navigation](#)
- [SAP Chart of Accounts](#)
- [Budget Procedures](#)

**Other Training Documentation**

- [Chairperson's Handbook](#)
- [Business Intelligence \(BI\) Training Documentation](#)
- [Oracle EPMS User Guide](#)
- [Using Oracle EPMS to Access Banner Revenue Reports](#)
- [University Budget Overview](#)
- [Budget and Financial Reporting Training Documentation](#)

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