**ONLINE CAPITAL REQUEST SYSTEM UPGRADE**
October 12, 2010

The online Capital Budget Request System has been upgraded to include many new features which are described in this document.

To directly access the system, use this link: – https://managementtools.wlu.edu/capitalbudget

Questions or comments contact:  Kelly Page in Facilities Management at x8494 or kpage@wlu.edu

**My Capital Request Summary**

The first page in the new system displays a summary count of all existing request records by the Area(s) and Department(s) you are assigned to and allows users to:

① Find an existing request by using the "Open Request" dropdown box or by selecting any of the record counts (links) for a searchable listing of just those records.
② Add a New Request
③ Manage your proxies
④ View your Role (user rights) that you have to the system for your department(s)



*Note:  you may still create requests for future capital planning for up to 5 years, however, they will not display on the summary page unless they are within 3 years of the current FY.

**ROLES AND PROXIES**

The system now has added flexibility to allow for multiple levels of approval and for any type of user to assign proxy rights to one or more individuals.  FM administration sets-up all Requesters and Approvers in the system as defined by each Area head.  Once a user is in the system they have the ability to assign their own proxies by using the "My Proxy" link on the webpage menu.   Two types of Users (or "Roles"):

**Requesters** – These users can create new requests and submit them for review to the first level of approval.  Only one person can be assigned as a Requester to any particular department but they can assign proxy to others.

**Approvers** -   Up to two levels of Approvers can be established in the system for any department.   All requests must be approved by Approver #1 (and #2, if one has been established) before being submitted to FM.   Approvers can assign proxies as well giving others rights to approve requests on their behalf.

<u>My Capital Budget Requests</u>

This page displays when you click on any of the record counts (links) from the previous page.  From this page you can:

① View a listing of all existing requests for the selected FY and department in Request ID order.  To change the sort order, just click on any column heading (clicking the same heading a second time will alternate the sort from ascending to descending).   To filter the records, use any of the dropdown boxes available.
② Click on any ID (or Title) to open that request's detailed page.
③ Check the current Status of your requests and any amounts approved by the various levels of Approval.
④ Find the account number (61 fund) of board approved requests.



<u>Capital Budget Request (Detailed Record)</u>

The following enhancements have been added to the existing capital request form used to create new requests:

① Ability to add an unlimited number of comments from requesters and reviewers.
② View "Events" or history of actions by users such as submitting for approval, canceling, deferring, etc.  Certain events will also trigger e-mail notifications to the appropriate system users.
③ Additional priority and amount fields for each Approver to provide.
④ Options for Approvers to return, approve, deny or defer requests they've received.

Use this link to return to previous web page.

My Capital Request Summary    My Proxies

Help

Close Request Form    My Capital Budget Request - #895 - "Dorem/Warner Gym - Fire Door Upgrades" Show: [ Comments & Events ▾ ]

## General Information

| Request Category: * | Facilities ▾ |
| For Fiscal Year: * | 2011/2012 ▾ |
| Area - Department: * | Treasurer - Facilities Management ▾ |
| Name of Originator of Request: * ▣ | Page, Kelly L. . . . Facilities & Capital Planning ▾ |
| This is a Request for a Vehicle: (only for FF&E requests) | No ▾ |

## Add a New Comment

① *Type in your comment here then click the "Add Comment" button below.*

[ Add Comment ]  [ Cancel ]   [ - Edit Comment - ]

### Request #895 Comments & Events

| Date: | Oct 5 2010 3:05PM |
| User: | Page, Kelly L. |
| Event: | Request Deferred to 2011/2012 During Upgrade |

| Date: | Oct 11 2010 12:30AM |
| User: | Page, Kelly L. |
| Comment: | All or some of this work may have already been done and we can cancel this request |

| Date: | Oct 11 2010 7:05AM |
| User: | Page, Kelly L. |
| Event: | Request Submitted. Status = Submitted to Approver 1 |

| Date: | Oct 11 2010 4:55PM |
| User: | Page, Kelly L. |
| Event: | Request Returned. Status = Returned to Requestor |

## Scope

| Request Title (limit 50 characters): * ▣ | Dorem/Warner Gym - Fire Door Upgrades |
| Description of Request (limit of 350 characters): * | Replace 4 fire door assemblies and install 21 magnetic hold-backs on additional doors. |
| Type of Request: * ▣ | Upgrade or Enhancement ▾ |
| Property (if applicable): | Doremus Gym/Warner Center ▾ |
| Rationale for Request (limit 350 characters): * | Fire doors are not in compliance and new regulation in life-safety code requires fire door inspections annually. Attempting to bring fire doors into compliance with code. |

## Schedule

| Priority: * | Requested | Approv.#1 | Approv.#2 | Rec. to Board |
| --- | --- | --- | --- | --- |
| | 1 ▾ | N/A ▾ | N/A ▾ | N/A ▾ |

| Desired Start Date (mm/dd/yyyy format): ▣ | |
| Desired Completion Date (mm/dd/yyyy format): ▣ | |
| Is this request contingent upon approval of another capital request: ▣ | No ▾ |
| If Yes, select which capital request this request is contingent upon: ▣ | - Select - ▾ / - Select - ▾ / - Select - ▾ |

③

## Budget

| Estimated Cost of Project: * ▣ | Requested | Approv.#1 | Approv.#2 | Rec. to Board |
| --- | --- | --- | --- | --- |
| | $33,000.00 | | N/A | |

| Basis of Cost Estimate: * | Reasonable Estimate ▾ |
| Comments (limit 250 characters): ▣ | Good estimate, see proposal from Skyline. |

Screenshot continued on next page…

②

**Status**

| Status: | Submitted to Approver 1 |
|---|---|
| Approved FY: | |
| Approved Amount: | |
| Account Number: | |

Once a user has submitted or approved the request, they can no longer edit the record. Use the **"Save a Draft…"** button to save your work until you're ready to submit.

[ Close Request Form ]  [ Discard Changes and Close Request Form ]  [ Save a Draft of This Request, DO NOT Submit Yet ]  [ Approve This Request ]

[ Deny This Request ]  [ Return This Request ]  [ Cancel This Request ]  ④

[ Defer This Request Until: ]  - Select - ▼

[ Combine This Request With: ]  - Select - ▼

**Options for Approvers:**

1. Approve This Request – Click this button to indicate your acceptance of the request and submit to the next approval level.
2. Deny This Request – Permanently denies the request. Do not use "Deny" if want to defer this request for consideration in a future fiscal year.
3. Defer This Request Until: Select a future FY from the dropdown box and then click the "Defer This Request Until" button. The request will remain available in the system for edit and review for the future FY.
4. Return This Request –Returns the request to the prior submitter to allow them to make any additional edits needed before you can approve their request.
5. Cancel This Request – Same process as "Deny" in that the record is no longer available for consideration, but an approver may not want some requests to be labeled "Denied". An example might be a request that the approver wants to pay out of operations instead of capital. Technically the request wasn't denied, but needs to be cancelled in the capital system.
6. Combine This Request With: If you don't want to approve and submit this request as its own item, but merge it with another request being submitted instead, select the request to be submitted from the dropdown and then click the "Combine This Requests" button. The status of the current record (that is not being submitted) will change to "Combined with Request ###". The record that is being submitted will show which request ID(s) were rolled into it. Before approving the request to be submitted, the approver may need to change the amount to cover all the items being combined.