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.

**My Capital Budget Requests**

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.

**Capital Budget Request (Detailed Record)**

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.
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.

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.