


# Setup Budget Amendment Request Checklist

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# Budget Amendment Request Setup Checklist

The purpose of the Budget Amendment Request (BAR) Setup Checklist is to aid users in setting up the TxEIS Business system and to help them begin productive use of the BAR process. Before performing any tasks, print the Budget Amendment Request Setup Checklist.

**Checklist for those not using workflow:**

Use this checklist if **Allow for Approval Process** is not selected on the Finance > Tables > District Finance Options page. The workflow process will not be used.

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| ❑ | 1. Designate at least one employee from the Business office to submit budget amendment requests. |
| ❑ | 2. Security Administration > Manage Users > Edit User<br><br>Add the employee's employee number. |
| ❑ | 3. Finance > Budget Amendment > Budget Amendment Maintenance<br><br>Verify that the employee has full BAR rights. |
| ❑ | 4. District Administration > User Profiles > Accounts<br>❑ Click **Add User** to add the employee.<br>• Create the user accounts.<br>• Select **BAR**.<br>❑ On the Permissions tab:<br>• Choose whether or not to select **Allow Account Creation**.<br>• Choose whether or not to select **Allow Multiple Functions on Expenditure Accounts**.<br>• Click **Save**. |

**Checklist for workflow users:**

Use this checklist if **Allow for Approval Process** is selected on the Finance > Tables > District Finance Options page. The workflow process is used.

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| ❑ | 1. Do each of the following:<br><br>• Create a list of all originators (e.g., campus and department secretaries).<br>• Create a list of first approvers by organization code (e.g, principals, directors, budget managers).<br>• Create a list of approvers (e.g., principals, directors, and above). |
| ❑ | 2. Personnel > Maintenance > Staff Demo > Demographic Information<br><br>• Add a work email address for each employee on the lists in step 1.<br>• Obtain employee numbers for the next step. |
| ❑ | 3. Security Administration > Manage Users > Edit User<br>• For each employee on the above-mentioned lists, add the employee's employee number to the user profile.<br>• Verify that each employee on the list of originators has full rights to the Finance > Budget Amendment > Budget Amendment Maintenance page.<br>• Verify that each employee on the list of approvers and first approvers has full rights to the Finance > Budget Amendment > Approve Budget Amendment page. |

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| ❑ | 4. District Administration > User Profiles > Accounts<br>❑ Click **Add User** to add the employee.<br>• Create the user accounts.<br>• Select **BAR**.<br>❑ On the Permissions tab:<br>• Choose whether or not to select **Allow Account Creation**.<br>• Choose whether or not to select **Allow Multiple Functions on Expenditure Accounts**.<br>• Click **Save**. |
| ❑ | 5. District Administration > Workflow > First Approver page<br><br>For each employee on the list of first approvers:<br>• Select **BAR** as the workflow type and click **Retrieve**.<br>• Click **+Add** and enter the employee data.<br>• (Optional) Select **Print Name**.<br>• Enter the campus/department ID.<br>• Click **Save**. |
| ❑ | 6. District Administration > Workflow > Approval Path<br><br>For each employee on the list of approvers:<br>• Select **BAR** as the workflow type and click **Retrieve Workflow**.<br>• Click **+Add** and enter the employee data.<br>**Note:** Approvers will be inserted into the BAR path sequentially from the approval path; therefore, clients may want to assign the Business Manager as the last person on the approval path. |
| ❑ | 7. District Administration > Workflow > Approval Rules<br><br>For each employee on the list of approvers, add the employee to this page. |
| ❑ | 8. District Administration > Workflow > Alternate Approver (Optional)<br><br>Add alternate approvers on this page. |


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