

# Core Integrator: Electronic Budget Amendment Form (eBA)

WALKTHROUGH & INSTRUCTIONS

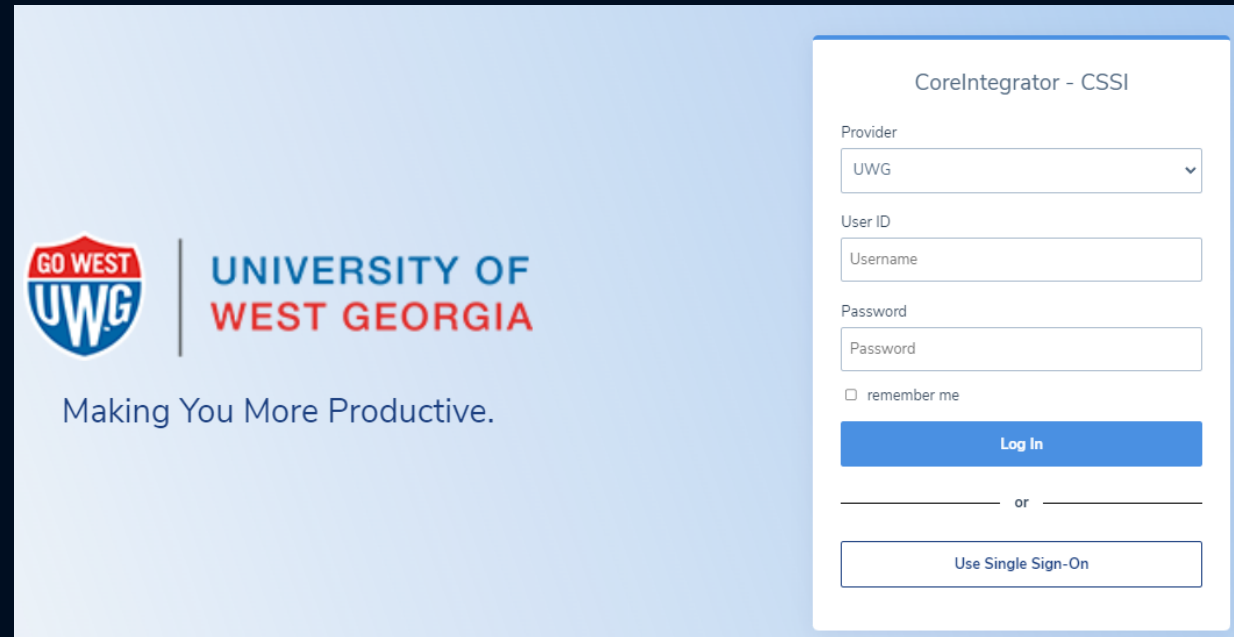
# A Budget Amendment form is submitted to Budget Services whenever:

- Spending authority (budgeted amount) needs to be added to or reduced from a department.
- Spending authority is moved between account codes (e.g. 512000, 700000, etc.)
- Additional revenue has been earned.
- Prior year fund balances need to be spent.
- A new department is requested.
- Changes to coding in a chart string are needed (fund, account, program, or class codes) or changing funding for a position.
- An employee is hired in an account code not previously used in the department.



# Getting Started

- <https://uwgforms.westga.edu/Login.aspx>
- Select Provider: UWG
- Login using UWG credentials



CoreIntegrator - CSSI

Provider  
UWG

User ID  
Username

Password  
Password

remember me

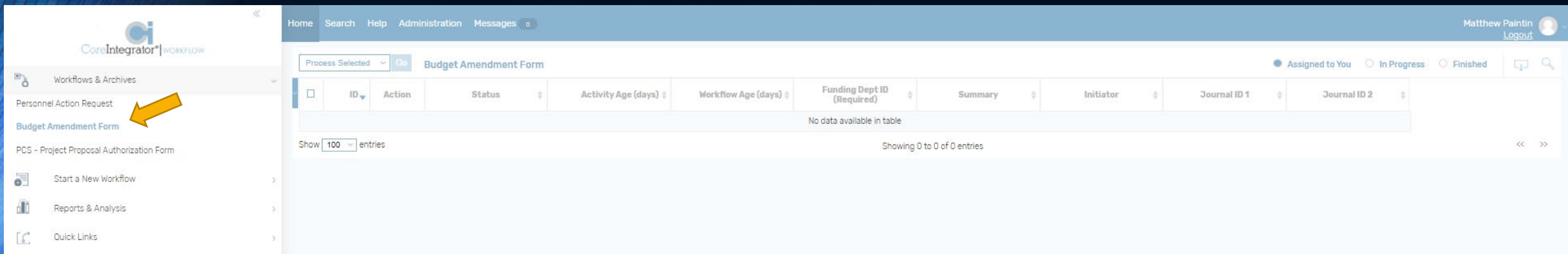
Log In

or

Use Single Sign-On

# Core Integrator Home Page

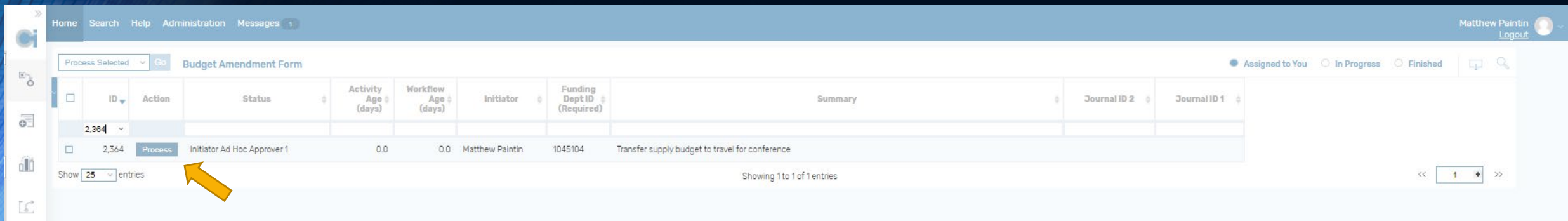
- From the Core Integrator Home Page, select the 'Budget Amendment Form' option listed in the pane to the left under "Workflows & Archives"
- From this screen the user can:
  - Start New Workflow
  - View all eBA forms that are:
    - Assigned to You
    - In Progress
    - Finished
  - Run Reports



The screenshot displays the Core Integrator Home Page interface. On the left, a navigation pane titled "Workflows & Archives" is visible, with the "Budget Amendment Form" option highlighted by a yellow arrow. The main content area shows the "Budget Amendment Form" workflow selected, with a "Process Selected" dropdown and a "Go" button. Below this, there is a table with columns for ID, Action, Status, Activity Age (days), Workflow Age (days), Funding Dept ID (Required), Summary, Initiator, Journal ID 1, and Journal ID 2. The table currently displays "No data available in table". At the bottom of the table, it shows "Showing 0 to 0 of 0 entries". The top right corner of the page shows the user's name "Matthew Paintin" and a "Logout" link.

# Selecting from the Home Page

- From the home page, under the Assigned to You section, users will see all forms currently in their step of the workflow.
- To take action on a form, select the “Process” icon.
- Important Home Page Fields:
  - ID – Unique ID number of the form
  - Status – The current step of the workflow the form is in.
  - Activity Age – Number of days the form has been in the current status.
  - Workflow Age – Number of days since the form was initiated.
  - Summary – Provides details of what the amendment is trying to accomplish



The screenshot displays a web application interface for managing budget amendments. The top navigation bar includes links for Home, Search, Help, Administration, and Messages. The user is identified as Matthew Paintin. The main content area is titled "Budget Amendment Form" and features a table with the following columns: ID, Action, Status, Activity Age (days), Workflow Age (days), Initiator, Funding Dept ID (Required), Summary, Journal ID 2, and Journal ID 1. The table contains one entry with ID 2,364, where the "Action" column contains a "Process" button. A yellow arrow points to this button. The interface also includes a search bar, a "Process Selected" dropdown, and a "Go" button. The bottom of the table shows "Showing 1 to 1 of 1 entries" and a pagination control.

ID	Action	Status	Activity Age (days)	Workflow Age (days)	Initiator	Funding Dept ID (Required)	Summary	Journal ID 2	Journal ID 1
2,364	Process	Initiator Ad Hoc Approver 1	0.0	0.0	Matthew Paintin	1045104	Transfer supply budget to travel for conference		

# Searching from the Home Page

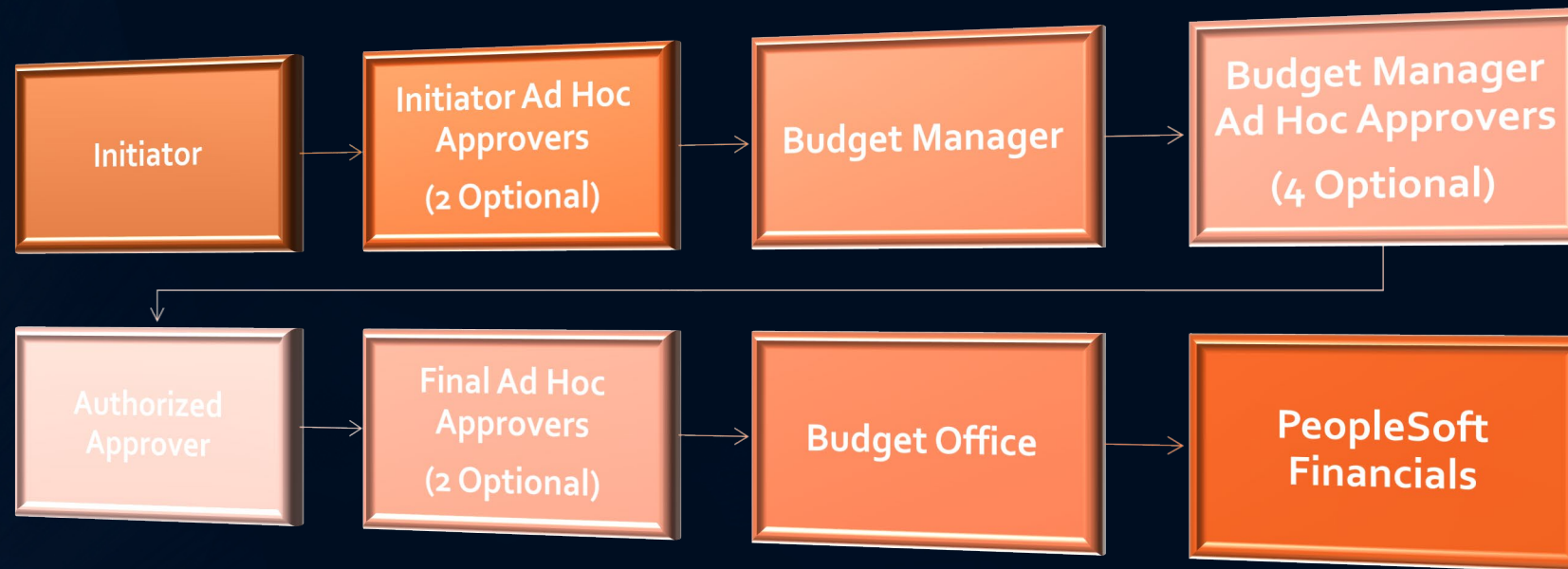
The screenshot shows a web application interface for searching Budget Amendment Forms. The top navigation bar includes 'Home', 'Search', 'Help', 'Administration', and 'Messages'. The user is logged in as 'Matthew Paintin'. The main content area is titled 'Budget Amendment Form' and features a search bar with a 'Process Selected' dropdown and a 'Go' button. Below the search bar are three filter tabs: 'Assigned to You' (selected), 'In Progress', and 'Finished'. A table displays the search results with columns for ID, Action, Status, Activity Age (days), Workflow Age (days), Initiator, Funding Dept ID (Required), Summary, Journal ID 2, and Journal ID 1. A single entry is shown with ID 2,364, Action 'Process', Status 'Initiator Ad Hoc Approver 1', and Summary 'Transfer supply budget to travel for conference'. A yellow arrow points to the search icon in the top right corner of the interface.

ID	Action	Status	Activity Age (days)	Workflow Age (days)	Initiator	Funding Dept ID (Required)	Summary	Journal ID 2	Journal ID 1
2,364	Process	Initiator Ad Hoc Approver 1	0.0	0.0	Matthew Paintin	1045104	Transfer supply budget to travel for conference		

- Click on the spy glass icon (🔍) to the right of the home page, a text line will appear under the headings that will allow the user to filter any of the headings listed to find existing eBA forms within any of the 3 sections (Assigned to You, In Progress, or Finished) on the home screen.
- From the In Progress or Finished sections, the user will only have “View” access to the forms listed. To “Process” forms the user must be in the Assigned to You section.



# eBA Workflow Steps

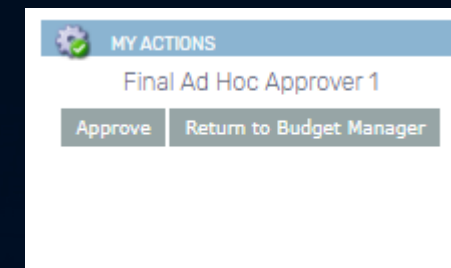
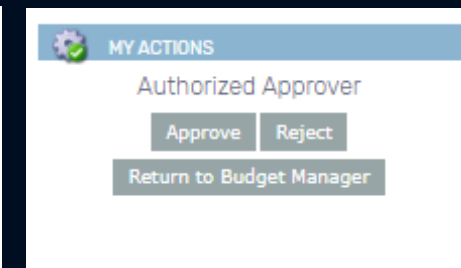
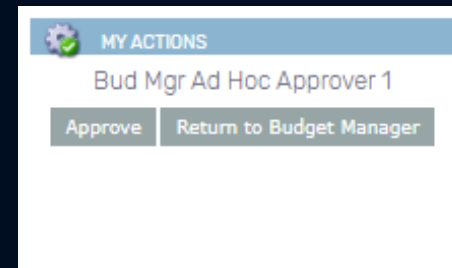
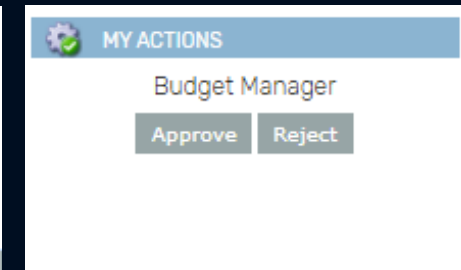
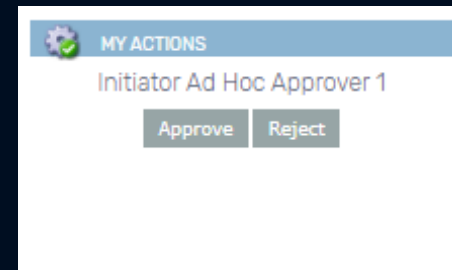


Approving the eBA

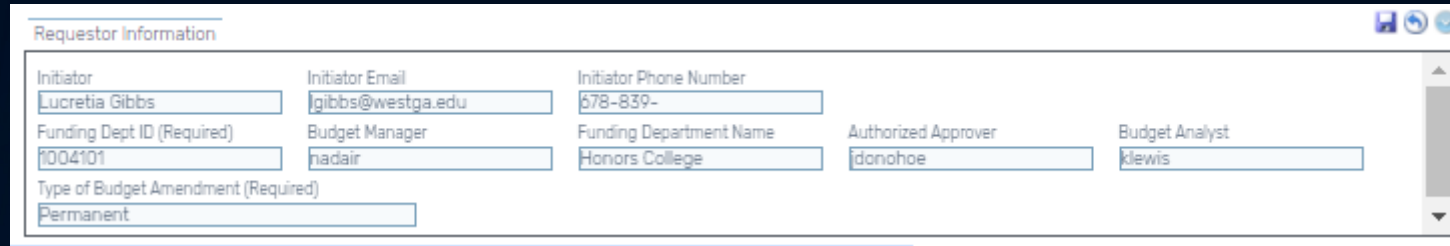


# Approver Actions

- At each step of the workflow, approvers will have actions specific to that step.
- Approvers after the Budget Manager step have the ability to Return to Budget Manager.
- Budget Managers are able to edit the form and resubmit.
- Authorized Approvers and Ad Hoc Approvers will not be able to edit the document however, but they will be able to make comments in the comments pane or attach related documents.



# Requestor Information



The screenshot shows a web form titled "Requestor Information". It contains the following fields and values:

Field	Value
Initiator	Lucretia Gibbs
Initiator Email	lgibbs@westga.edu
Initiator Phone Number	678-839-
Funding Dept ID (Required)	1004101
Budget Manager	nadair
Funding Department Name	Honors College
Authorized Approver	donohoe
Budget Analyst	klewis
Type of Budget Amendment (Required)	Permanent

- The Requestor Information section provides details on:
  - Who submitted the eBA
  - The Funding Department ID that is driving the workflow
  - The Budget Manager, Authorized Approver, and Budget Analyst for this Department ID
  - The Type of Amendment (Permanent or One-Time)

# Reviewing the Amendment

- The 4 Ledger groups are REVEST, ORG\_BD, APPROP\_BD, & PROJ\_GR\_BD
- Review that the chart strings being used, and the budget amounts being moved are accurate.
- Edits can be made at the Budget Manager step of the workflow however this section is locked for all other approval steps.

Summary (Required)

TEST

4

Ledgers

REVEST (Account Codes 4XXXXX)

Department Name	Bud Yr	Account	Fund	Dept ID	Program	Class	Project	Amount	
									Insert
								TOTAL	0.00

ORG\_BD (Account Codes 5xx000)

Department Name	Pos Num	Bud Yr	Account	Fund	Dept ID	Program	Class	Project	Amount	
										Insert
								TOTAL	0.00	

APPROP\_BD (Account Codes 600000,700000, 800000)

Department Name	Year	Account	Fund	Dept ID	Program	Class	Project	Amount	
									Insert
								TOTAL	0.00

PROJ\_GR\_BD

Department Name	Pos Num	Year	Account	Fund	Dept ID	Program	Class	Project	Amount	
CACSI Grant		2022	714000	20000	1013202	12100	62000	TEST	500.00	✗
CACSI Grants		2022	748000	20000	1013202	12100	62000	TEST	-500.00	✗
										Insert
								TOTAL	0.00	



# Budget Manager Approval

- At the Budget Manager step of the workflow, the entire contents of the BA may be edited.
- The Budget Manager has the option to edit/insert additional Ad Hoc approvers into the workflow following their own approval.
- The 2 different levels the Budget Manager can insert approvers into:
  - Budget Manager Ad Hoc Approvers
    - 4 optional approvers
    - Inserted BEFORE the Authorized Approver level
  - Final Ad Hoc Approvers
    - 2 optional approvers
    - Inserted AFTER the Authorized Approver level

1B

### Budget Manager Ad Hoc Approvers

Ad Hoc Approver 1	Action Taken
<input type="text"/>	<input type="text"/>
Ad Hoc Approver 2	Action Taken
<input type="text"/>	<input type="text"/>
Ad Hoc Approver 3	Action Taken
<input type="text"/>	<input type="text"/>
Ad Hoc Approver 4	Action Taken
<input type="text"/>	<input type="text"/>

1D

### Final Ad Hoc Approvers

Ad Hoc Approver 1	Action Taken
<input type="text"/>	<input type="text"/>
Ad Hoc Approver 2	Action Taken
<input type="text"/>	<input type="text"/>

# AA Specific Approval Workflow

- In Academic Affairs, all eBA's will need approval from the Provost's Office in order to be fully approved.
- The Ad Hoc Approver steps will need to be utilized so that all parties are able to approve in the proper order:
  - Budget Manager Ad Hoc Approver 1: **AA Divisional Budget Manager (Lucretia)**
  - Budget Manager Ad Hoc Approver 2:
  - Budget Manager Ad Hoc Approver 3:
  - Budget Manager Ad Hoc Approver 4:
  - Final Ad Hoc Approver 1: **Dean (Based on College)**
  - Final Ad Hoc Approver 2: **Provost (Dr. Preston)**
- The initiator will be responsible for inserting these approvers however the Budget Manager will have edit access in case they are not added.

The screenshot displays two sections of an approval workflow interface. The top section, labeled '1B', is titled 'Budget Manager Ad Hoc Approvers' and contains four rows. Each row has a label on the left (e.g., 'BM Ad Hoc Approver 1'), a text input field with a dropdown arrow, and an 'Action Taken' checkbox. The first row shows 'Gibbs, Lucretia' in the input field. The bottom section, labeled '1D', is titled 'Final Ad Hoc Approvers' and contains two rows. Each row has a label on the left (e.g., 'F Ad Hoc Approver 1'), a text input field with a dropdown arrow, and an 'Action Taken' checkbox. The first row shows 'Yates, Bradford' in the input field, and the second row shows 'Preston, Jon'.

\*The only exception would be eBA's moving Grant funding. These should go through ORSP and the only additional approver needed may be the PI of the grant.

# Authorized Approver Review

Requestor Information					
Initiator	Initiator Email	Initiator Phone Number			
Lucretia Gibbs	gibbs@westga.edu	678-839-			
Funding Dept ID (Required)	Budget Manager	Funding Department Name	Authorized Approver	Budget Analyst	
1004101	hadair	Honors College	idonohoe	klewis	
Type of Budget Amendment (Required)					
Permanent					

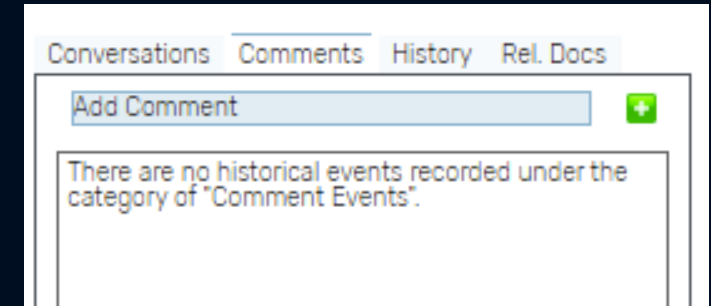
- At the Authorized Approver step in the workflow, the Approver can take the following actions:
  - Approve – move the eBA to the next step of the workflow
  - Reject – Return the eBA to the Initiator listed in the 'Requestor Information' section
  - Return to Budget Manager – Return the eBA to the Budget Manager listed in the 'Requestor Information' section.
    - Include a comment if returning to let Budget Manager know what is needed to process this request.



# Comments, History, & Attachments

- The pane on the right side of the screen allows users to leave comments or add attachments that will be visible throughout the workflow.
  - Comments tab: Be sure to leave comments if anything needs to be known about the form.
  - History tab: Shows every action that has been taken on the document. (This tab can only be viewed after the document has been initially submitted.)
  - Rel.Docs tab: Allows for documents to be attached. To do so, click on the green + icon. Be sure to upload all documents related to the amendment.

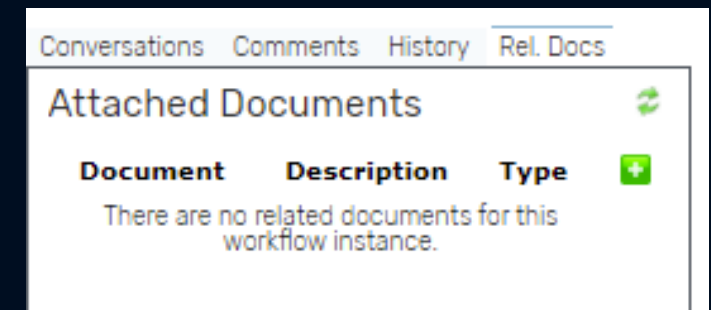
\*Ignore the "Conversations" tab



Conversations **Comments** History Rel. Docs

Add Comment +

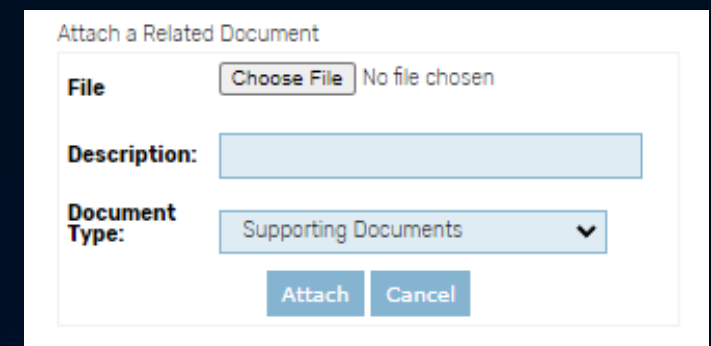
There are no historical events recorded under the category of "Comment Events".



Conversations Comments **History** Rel. Docs

Attached Documents ↻

Document	Description	Type	+
There are no related documents for this workflow instance.			



Attach a Related Document

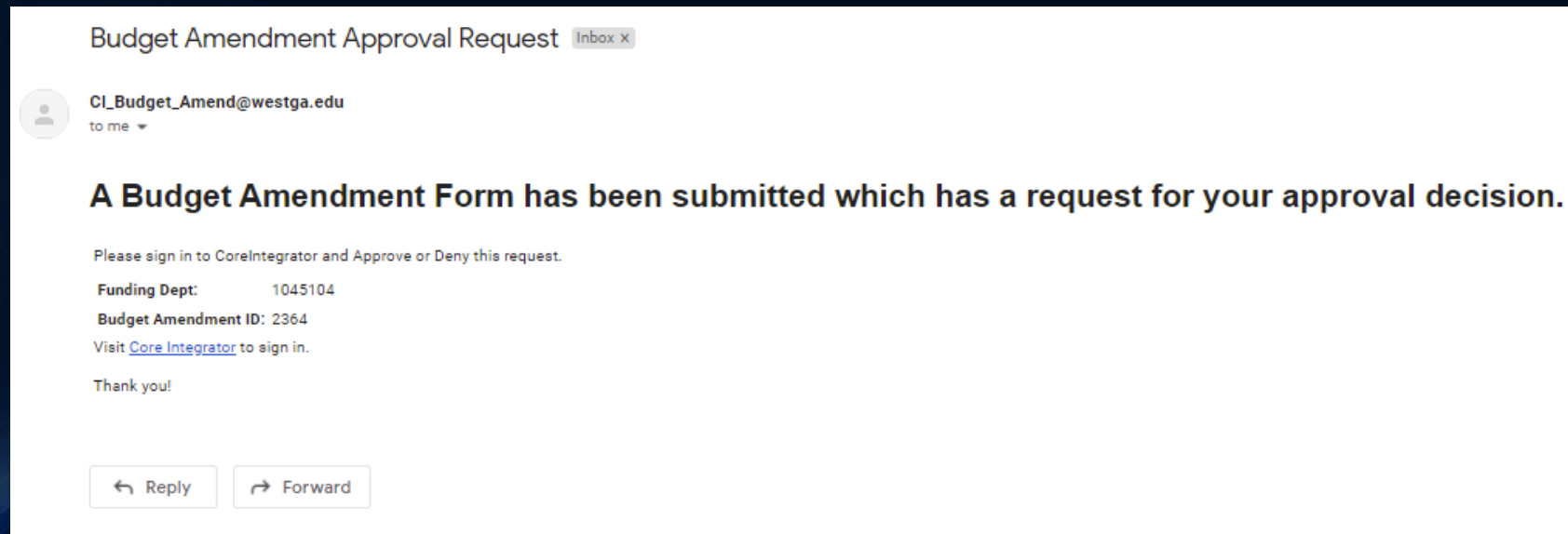
File  No file chosen

Description:

Document Type:  ▼

# Email Notifications

- When an action is taken on an eBA (Submitted, Approved, Rejected, etc.), a system generated email is sent to the person in the workflow step the eBA has moved to.



# Approval Proxy

- If an approver will not be able to access the eBA for any reason (vacation, sick leave, etc.), Core Integrator allows approvers to designate a proxy that will be able to approve on behalf of them for a specified amount of time.
- A Proxy must be at the same level of the organization or higher than the current approver.
- To assign a proxy, the approver or supervisor of the approver must send an email to the [budget-services-list@westga.edu](mailto:budget-services-list@westga.edu) listserv with the information below:
  - Subject: eBA Approval Proxy Request
    - Approver Name
    - Proxy Name
    - Start Date
    - End Date
    - Reason



# Questions?

- ROLLOUT TENTATIVELY SCHEDULED FOR FEBRUARY 1<sup>ST</sup>
- JANUARY 31<sup>ST</sup> WILL BE THE DEADLINE FOR ACCEPTING PAPER/EMAIL BA'S
- IF YOUR COLLEGE OR DIVISION DOES NOT HAVE THE BULK OF THE USERS TRAINED BY MID JANUARY, WE CAN WORK ON SCHEDULING A ONE-OFF SESSION FOR THE REMAINING USERS.