




Budget & Planning

Request Role/Access Instructions

All Funds Planning, Budget Requests, Budgeting (Operating Budget), Labor Planning

- Go to the Access Provisioning Tool at <https://it.arizona.edu/service/access-provisioning-tool>
- Click the “Submit Access Request” link.

THE UNIVERSITY OF ARIZONA



Information Technology

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Access Provisioning Tool

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The Access Provisioning Tool is used to request access to, as well as removals from, restricted functions in UAccess systems (e.g. any access other than self-service or standard delivered functionality that is included with your active Employee, Student Worker or Designated Campus Colleague position).

Note: Prior to requesting access the **UAccess Acceptable Use Policy** must be reviewed and completed. Some access roles also require additional prerequisite training prior to entering a request. Consult with your department Access Provisioning Liaison for details.

Request the Service:

Access Provisioning Tool

- **Submit Access Request** - Add or Remove Access Permissions, View Requests, and look up Role Detail information.
- **Approve and Monitor Requests** - Access Provisioning Liaisons and Data Stewards use this option to review and approve requests. General users may use this option to review the status of requests they submitted.
- **Manage Access Provisioning Liaison Authorizations** - Deans and Department Heads may designate a specific authorized person for the role of Access Provisioning Liaison for the Department or College.



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- Create a new request by entering employee information (NetID, EmplID, Name or Email).
- Select the Access Provisioning Liaison who will approve the access request.
- Select a Request Type, a Request Reason, and include a Business Justification.
- Select Continue to go to the Role Selection.
- Select the “UAccess Budget and Planning” from the Select Access/Roles dropdown (Subject Area defaults to UAccess Budget and Planning).

Select Access/Roles

Clear Roles

System
 UAccess Budget and Planning

Subject Area
 UAccess Budget and Planning

Business Justification for these roles (Please review the Business Justification previously described and provide more information for roles selected here, if needed).

This is a test for budget request

Make Selections

<input type="checkbox"/>	All Funds Planning	Grants access to Enter/Submit/Approve data for All Funds Planning.		
<input type="checkbox"/>	Budget Requests	Grants access to Enter/Submit/Approve data for Budget Requests.		
<input type="checkbox"/>	Budgeting (Operating Budget)	Grants access to Enter/Submit/Approve data for Operating Budget.		
<input type="checkbox"/>	Labor Planning	Grants access to Enter/Submit/Approve data for Labor Planning.		

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- Enter in any additional information in the Business Justification section.

Business Justification for these roles (Please review the Business Justification previously described and provide more information for roles selected here, if needed).

Test for Budget Request - Documenting Process

- Select access and role to the module or modules you need access to.

Make Selections

<input type="checkbox"/>	All Funds Planning	Grants access to Enter/Submit/Approve data for All Funds Planning.		
<input type="checkbox"/>	Budget Requests	Grants access to Enter/Submit/Approve data for Budget Requests.		
<input type="checkbox"/>	Budgeting (Operating Budget)	Grants access to Enter/Submit/Approve data for Operating Budget.		
<input type="checkbox"/>	Labor Planning	Grants access to Enter/Submit/Approve data for Labor Planning.		

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- Note: Access to the RCM Metric Module and the RCM Allocation Module is assigned by college/division through the Office of Budget and Planning.



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All Funds Planning Module:

The All Funds Planning Module is the summarizing submission step for the Labor, Operating Budget, and Budget Request Modules. This Module will aggregate data for all departments within a college or division and will allow for a single narrative submission to accompany the college/division level submission.

Make Selections

<input checked="" type="checkbox"/>	All Funds Planning	Grants access to Enter/Submit/Approve data for All Funds Planning.	Form incomplete
REQUIRED - Please list the College Codes (comma-separated) for which access is requested:		<input type="text"/>	Select Role
REQUIRED - Please select one option from the dropdown for which access is being requested:		<input type="text" value="(select one)"/>	
<input checked="" type="checkbox"/>	Budget Requests	Grants access to Enter/Submit/Approve data for Budget Requests.	Form incomplete
REQUIRED - For Department Editor or Approver, please list the Department IDs. For College Approver, please list College Codes (comma-separated) for which access is requested:		<input type="text"/>	Module
REQUIRED - Please select one option from the dropdown for which access is being requested:		<input type="text" value="(select one)"/>	
<input checked="" type="checkbox"/>	Budgeting (Operating Budget)	Grants access to Enter/Submit/Approve data for Operating Budget.	Form incomplete
REQUIRED - Please list the Department IDs and/or College Codes (comma-separated) for which access is requested:		<input type="text"/>	Select Role
REQUIRED - Please select one option from the dropdown for which access is being requested:		<input type="text" value="(select one)"/>	
<input type="checkbox"/>	Labor Planning	Grants access to Enter/Submit/Approve data for Labor Planning.	

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- When selecting “All Funds Planning” you will be required to input college codes. You will also need to select the type of access. Here is a list of those options and definitions.
- Type of Roles for All Funds Planning:
 - Editor: This role allows the user to edit/input data but will not allow the user to approve the data.
 - Approver: This role allows the user to approve the data but will not allow the user to make changes to that data.
 - Both Editor and Approver: This role allows the user to both edit and approve the data.

Budget Request Module

Within the Budget Request Module, financial planners will be able to request new funding allocations from their appropriate leadership (department to college/division--this may be a dean’s office within a college, or possibly to a VP or SVP in an administrative unit). The Budget Request Module will also allow colleges to submit Faculty Recruitment Plans.



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Budget Requests Grants access to Enter/Submit/Approve data for Budget Requests. Form incomplete

REQUIRED - For Department Editor or Approver, please list the Department IDs. For College Approver, please list College Codes (comma-separated) for which access is requested:

REQUIRED - Please select one option from the dropdown for which access is being requested:

Module

Select Role

(select one)
Department Editor
Department Approver
College Approver

Budgeting (Operating Budget) Grants access to Enter/Submit/Approve data for Operating Budget. Form incomplete

REQUIRED - Please list the Department IDs and/or College Codes (comma-separated) for which access is requested:

REQUIRED - Please select one option from the dropdown for which access is being requested:

(select one)

Labor Planning Grants access to Enter/Submit/Approve data for Labor Planning. Form incomplete

REQUIRED - Please list the Department IDs and/or College Codes (comma-separated) for which access is requested:

REQUIRED - Please select one option from the dropdown for which access is being requested:

(select one)

- When selecting “Budget Requests” you will be required to input college codes or list department IDs. You will also need to select the type of access. Here is a list of those options and definitions.
- Type of Roles for Budget Requests:
 - Department Editor: This role allows the user to edit/input data but will not allow the user to approve the data.
 - Department Approver: This role allows the user to approve the data but will not allow the user to make changes to the data.
 - College Approver: This role allows the user to edit/approve the data at the College level.
- Note: If you are requesting the College Approver role you must list the college code (please do not list individual department IDs). If you are requesting the Department Editor or Department Approver roles but need access to all the department IDs in the college, please list college code.

Operating Budget Module

The Operating Budget Module will provide departmental, college, and division financial planners the opportunity to create a multi-year profit and loss (P&L) style operating budget for each planning fund within their organization. This module will allow users to create financial plans by budget object, organization, and fund for later aggregation into the college or division level in the All Funds Planning Module.



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Make Selections

<input type="checkbox"/>	All Funds Planning	Grants access to Enter/Submit/Approve data for All Funds Planning.		
<input type="checkbox"/>	Budget Requests	Grants access to Enter/Submit/Approve data for Budget Requests.		
<input checked="" type="checkbox"/>	Budgeting (Operating Budget)	Grants access to Enter/Submit/Approve data for Operating Budget.		Form incomplete
<p>REQUIRED - Please list the Department IDs and/or College Codes (comma-separated) for which access is requested:</p> <p>REQUIRED - Please select one option from the dropdown for which access is being requested:</p>				
<input type="checkbox"/>	Labor Planning	Grants access to Enter/Submit/Approve data for Labor Planning.		

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Module

Select Role

(select one)
Editor
Approver
Both Editor and Approver

- When selecting “Budgeting (Operating Budget)” you will be required to input college codes or list department IDs. You will also need to select the type of access. Here is a list of those options and definitions.
- Type of Roles for Budgeting (Operating Budget):
 - Editor: This role allows the user to edit/input data but will not allow the user to approve the data.
 - Approver: This role allows the user to enter approve the data but will not allow the user to make changes to that data.
 - Both Editor and Approver: This role allows the user to both edit and approve the data.

Labor Planning Module

The Labor Planning Module allows for the planning of all personal services and employee related expenditure (ERE) costs. The Labor Planning Module also allows for the planning of full-time equivalency (FTE) counts by broad position categories at the department level. Data from the Labor Planning Module will flow automatically into the Operating Budget Module according to the budget objects planned within the Labor Planning Module.

Make Selections

<input type="checkbox"/>	All Funds Planning	Grants access to Enter/Submit/Approve data for All Funds Planning.		
<input type="checkbox"/>	Budget Requests	Grants access to Enter/Submit/Approve data for Budget Requests.		
<input type="checkbox"/>	Budgeting (Operating Budget)	Grants access to Enter/Submit/Approve data for Operating Budget.		
<input checked="" type="checkbox"/>	Labor Planning	Grants access to Enter/Submit/Approve data for Labor Planning.		Form incomplete

Showing 1 to 4 of 4 entries

Module

Select Role

(select one)
Editor
Approver
Both Editor and Approver

- When selecting “Labor Planning” you will be required to input college codes or list department IDs. You will also need to select the type of access. Here is a list of those options and definitions.
- Type of Roles for Labor Planning:
 - Editor: This role allows the user to edit/input data but will not allow them to approve the data.



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- o Approver: This role allows the user to approve the data but will not allow the user to make changes to that data.
- o Both Editor and Approver: This role allows the user to both edit and approve the data.

Questions?

Please visit our Axiom provisioning FAQ page for answers to common questions.

<https://planning.budget.arizona.edu/faq/axiom-access-provisioning>