WHO CAN SET BUDGET PREP SECURITY?

Only Organization Managers have the ability to set Budget Prep security.

You can run 2 reports from the Budget Financial Reports folder to find the organization manager, or you can contact the Budget Office.

GRANTING BUDGET PREP SECURITY

STEP 1:
Go to your Webraider portal, F&A Work Tools Tab. Choose the Budget Prep Security link under the BUDGET section.
STEP 2:
Select to Request Access to Banner Finance, Human Resources or Student.

STEP 3:
Select Budget Prep Security Request

Note: If you do not see an option for the system to which you are requesting access, please email pas.is@stu.edu for further assistance.
STEP 4:
Input the eraider ID of the employee to whom you are granting security. If you do not know the eraider ID, use the Search for eRaiderID button. Click the Next button to continue.

STEP 5:
If you would like the employee to have access to all organization codes in your control, simply click on the double arrow box ‘>>’. Otherwise, highlight a selection of organization codes and choose the single arrow box ‘>’ to give access to only those orgn codes.
STEP 6:
Then choose the Submit button to add the security.

![Security Selection Screen]

STEP 7:
You will then be shown a confirmation screen listing the security you have just added. An email will also be sent to both the person requesting the security and the employee to whom security has just been granted.

![Confirmation Screen]

Your Request has been Submitted.

Budget Prep Security Request Summary

eRaider ID: aprieto - Amelia Prieto
Tech ID: R00520468

Amelia Prieto has been granted access to update Budget Prep data for the organization code(s) listed below:
H 533049 - Quality Improvement Elp
H 533050 - Media Services Elp
H 533051 - Media Services Elp

Please contact your Institutional Budget Office if you have any questions.
REMOVING BUDGET PREP SECURITY

Repeat Steps 1 – 4 above.

At Step 5, use the deselect arrows `<` and `<<` to move organization codes from the orgn selected column.

The follow Steps 6 and 7 above.
BUDGET PREP SECURITY REPORTS

If you would like to know who has access to your organization codes you can find this information in a report.

STEP 1:
Select the Reports link.
STEP 2:
Select the report you would like to run.
You can choose to see all users with access to your organization code with “List Budget Prep Report Users”.
Or you can choose to see all access for one individual with “Budget Prep Access for Selected User”.

List of Budget Prep Report Users:
From the drop down list of organization codes, choose the orgn code that you would like to see the users on.
Then click on Get Budget Prep Users.
REPORT OUTPUT:
You can see more data by changing the page size to 25 or 50. You can also page forward and back with the arrows.

You can change the sort order of the report by clicking on each column heading. This example chose to sort in name – alpha order.
Budget Prep Access for Selected User:

Input the eraiderID of the user you would like to view access for, or use the Lookup feature to search for an eraiderID.

Then select the button Get Budget Prep Users to run the report.

REPORT OUTPUT:

Report will show all organization codes a user has access to.