Budget Manager Assignment and Delegations
SUMMARY

DePaul’s PeopleSoft self-service security application allows management to assign budget managers to departments within their area of responsibility. Assigned budget managers may then establish delegates to perform specific system functions including the ability to view reports, enter requisitions and approve invoices, perform budget planning, and enter pay requests. Additionally, the system provides access for Financial Systems to assign proxy rights to individuals at the behest of senior management.

Following below is a more detailed description of the various types of assignments, their access levels, who may assign such access, and step by step instructions for completing budget manager and delegation assignments. Please direct any questions regarding this document or these processes to FinSystemSecurity@depaul.edu.

The functions of the self-service budget manager application include the following:

- Proxy Assignment
- Budget Manager Assignment
- Delegation of Access Rights to view reports stored on the Mobius Server:
  - FINACTVTYX – Daily/Monthly Financial Activity Report
  - GFTACTVTYX – Monthly BSR Gift Accounting Report
  - HR_CUREMPX – Biweekly Active Employees Report (no salary information)
  - HR_CUROPOSX – Biweekly Active Positions Report (no salary information)
  - LBR/POS_X – Biweekly Payroll Redistributions Report (contains salary information)
  - LBR/RPT_X – Biweekly Salary Costs Status Report (contains salary information)
  - SCHOLRSHPX – Monthly Scholarship Report
  - VAC_SICKX – Biweekly Vacation/Sick Leave Report (no salary information)
- Delegation to view Telecommunications Details available on the Pinnacle System
- Delegation of Access Rights to perform system functions:
  - Enter Requisitions
  - Approve Invoices
  - Enter Budget Planning Information
  - Enter Pay Requests
  - Enter Position Requests

PROXIES

A Proxy is someone who is granted all rights and privileges to all of a Manager’s DeptIDs. Although this feature allows a user to ‘act as’ another person for all intents and purposes, any transaction recorded will be under the Proxy’s UserID. The purpose of this feature is to allow for an efficient delegation of all activities to a large number of departments.
The Office of Financial Systems maintains the active list of Proxies. To establish a Proxy, the granting Manager should send an email with the request to FinSystemSecurity@depaul.edu.

ASSIGNMENT

Budget Manager Assignment is a self-service feature that allows management and their proxy, if applicable, to assign or update the budget manager for DeptID’s within their area of responsibility. A Budget Manager cannot remove him/herself as Budget Manager on any of his/her own departments. In addition, when a Budget Manager of a DeptID is terminated or is on leave, PeopleSoft will automatically assign as Budget Manager the next upward level of management.

DELEGATION

Delegation is an activity and employee specific election for each DeptId. Budget managers and their associated hierarchy levels of management (EVP, VP/Dean and AVP/Directors) will have the ability to elect and/or modify delegations for DeptIds under their control. To note:

1. Delegations can only be made to active employees.
2. Delegations can only be made to active DeptIds.
3. Delegations made by active employees who later become inactive remain in effect.
4. Delegations for employees who become inactive after an election is made are not automatically removed, but the delegate’s UserId will be inactive. A budget manager can also remove delegations (for active or inactive employees) at any time.
5. Changes to elections are stamped with effective dates and the UserId of the individual who made the last election.
6. Delegation elections for Requisitioning, Invoice Approval, and Budgeting will be fed to the PeopleSoft Financial System (FIN) three times a day (6am, noon and 6pm). Delegations for reports stored on Mobius and Pinnacle will update once nightly (10pm).
7. It is a Budget Manager’s responsibility to review his/her active DeptIDs to ensure appropriate delegations and inactivate those no longer in effect.
BUDGET MANAGER ASSIGNMENT

To assign a Budget Manager, users should enter Campus Connection:

https://campusconnect.depaul.edu

From the menu, users should then navigate to:

Manager Self Service, Budget Manager Home Page, Budget Manager Update
To Find a Department, enter DPAUL as the SetID and all or part of a DeptId or Description. Click ‘Search’ and select the desired DeptID from the returned list. The most recent row of the Department will be returned. To change the Budget Manager, click on the . A new row will be inserted with today’s date, with the current Budget Manager pre-populated. To select a new Budget Manager, click on the .
To find an employee, use any of the search fields available, and click ‘Lookup’. Select the desired person from the returned list.

Remember to Save the change. An email will be generated alerting the new Budget Manager.
### Budget Manager Update

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set ID</td>
<td>DPUL</td>
</tr>
<tr>
<td>Department</td>
<td>67400</td>
</tr>
</tbody>
</table>

#### Department Profile

- **Effective Date:** 10/1/2014  
- **Status:** Active  
- **Description:** Accounts Payable  
- **Location Set ID:** DPUL – DePaul GL, Business Unit  
- **Location:** LSGP – Lake Campus  
- **Mgmt ID:** 08062221  
- **Manager Position:** Senior Editor  
- **Emp ID:** N/A

[Image of the Budget Manager Update page from the Office of Financial Systems – DePaul University]
BUDGET MANAGER ACTIVITY DELEGATIONS

To elect delegates, users should enter Campus Connection via links from DePaul’s homepage or through the following URL:

https://campusconnect.depaul.edu

From the menu, users should then navigate to:
Manager Self Service, Budget Manager Home Page, Budget Manager Delegation
To find a Department, enter DPAUL as the SetID and enter all or part of a DeptId or Description. Click ‘Search’ and select the desired DeptID from the returned list.

The returned page will list any existing delegates and the activities they have been given access to. To add a Delegate to an existing list, click . To select a Delegate, click on the .

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Office of Financial Systems – DePaul University
To find an employee, use any of the search fields available, and click ‘Lookup’. Select the desired person from the returned list.

Use the check boxes to select each activity the person is being delegated to perform. **Remember to Save.**

To create more than one delegate, click on the and repeat the process.

To remove one or more activities from an existing delegate, uncheck the desired boxes and Save.
ADDITIONAL INFORMATION

The Office of Financial Systems, a division of Financial Affairs, is available to answer questions or concerns that users might have regarding the Assignment and Delegation process.

In addition, for those Budget Managers who have large numbers of departments and delegates, the Office of Financial Systems will assist you in mass updates.

For assistance, please send an email to FinSystemSecurity@depaul.edu.

Other issues, such as questions concerning Campus Connection or browser handling can be directed to the IS Help Desk at 312-362-8765.