

CAS Budget System

Department Reviewer Tutorials

Logging in

1. Navigate to the [CAS-IT Budget System website](#) and log in using the **CentralLogin** button.
2. You will be brought to the **Home** page, where you can see a list of **Deadlines** for the budget planning process over this year.

Department Review

By selecting the **Department Review** button at the top of the page, you'll be taken to a page titled **Department Requests for Review**. Here, you can view every request submitted to your department as well as the information pertaining to those requests. Features available on this page are shown below.

Priority	View Request Details	AIF Annual Salary	Request Type	Requester	Department	Status	Submit to College	Return to Requester	Edit Request
1	Test 1		Permanent / Temporary Enhancement	M Regilio Admin	Demo	! department review	Submit to College	Return	Edit Request
2	Test 2		Permanent / Temporary Enhancement	M Regilio Admin	Demo	! department review	Submit to College	Return	Edit Request
3	Test 3		Permanent / Temporary Enhancement	Bob LeGrand	Demo	! department review	Submit to College	Return	Edit Request

- **Search by Keyword:** Search through applications and their contents with a keyword.
- **Add Filters:** Filter applications with specific criteria. After clicking the button, use the two drop-down boxes and text box to specify what you want to filter the applications by. If necessary, you may add another filter by using the **Add filter** button. Afterwards, select **Submit** to add the filter, and it will be added next to the **Add filters** button. If it needs to be removed, you can click the **(-)** next to the filter.
- **View Request Details:** Click the name of the request to view the details. This will take you to a new page that displays the details of the request and **Logs** of all actions taken on this request, including creation, submission, approval, and returns to the requester.
- **Department:** Click the box to edit the department of the request.
- **Status:** View the status of the selected request.
 - **Returned by department:** The request was sent back to the original requestor.
 - **Department review:** The request is being reviewed by the department it was submitted to.
 - **College review:** The request is being reviewed by the college.
- **Return to Requester:** Click **Return** to send the selected request back to the requestor.

*Note: To delete a request from the system, the request must first be returned to the requestor by clicking **Return to Requestor** and then deleted by the requestor from the **My Requests** page.*

Exporting Details of Requests

1. Under **Department Requests for Review**, click the **View / Export Details** button.
2. This will take you to a new page that displays the details of all current requests. To export the data, click the **Export** button in the top left corner.
3. A window will pop up showing you several options to export the data in, including **.csv**, **.txt**, and **JSON**. Select your preferred file format to save the file to your computer.

Editing and Updating Requests

1. Under **Department Requests for Review**, click **Edit Request** for the desired request you would like to edit.
2. You will be brought to the **Edit Request** page. From here you can update all the selected request's details.
3. When finished, click the **Save Request** button at the bottom of the page.

Submitting Requests for College Review

1. Under **Department Requests for Review**, specify a priority for the respective request by clicking the blank box under the **Priority** column and setting a number. To change a priority number that has already been set, click the number again.
2. Click **Submit to College** to submit the request to the college for review. This column will be blank until a priority has been specified in the **Priority** column.
 - Alternatively, to submit all requests simultaneously, click the **Submit all for College Review** button located under the requests table.

*Note: **Submit all for College Review** will only submit requests that are eligible for submission. To be eligible for submission, the request must have an assigned priority and show **Submit to College** under the **Submit to College** column.*

Upload Files

By selecting the **Upload Files** button at the top of the page, you'll be taken to a page titled **Upload Department Files**. On this page, you can upload files related to your budget request under the **Upload New Files** heading and view previously uploaded files under the **Previously Uploaded** heading.

View Previously Uploaded Files

Beneath the heading **Previously Uploaded**, you'll see a list of all the files you have previously uploaded along with several headings.

- **Department** shows you which department you uploaded the files to.
- **Budget and Planning Document, Scholarship and Creative Report, and Reassigned Time Report** have links beneath them to let you view and download the files you uploaded.
- **Delete** will let you delete the documents from the department files.

Upload New Files

To upload new files:

1. Use the drop-down box under **Department** to select the department you wish to upload to.
2. Select **Choose File** under each document heading of **Scholarship & Creative Report, Reassigned Time Report** and **Annual Report** to upload your respective document.
3. After uploading your files, select the **Submit** button to finish uploading your files to the department.