

CAS Budget System

Requester Tutorials

This document will guide you through the process of creating a budget system request through the CAS-IT Budget System website.

*FYI: It is no longer necessary to create a yearly version of each budget request or to make copies of previously submitted budget requests to submit it again for the upcoming fiscal year. All previously submitted budget requests will be returned to the **department review** status at the beginning of the budget request period.*

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.

Creating a Request

1. From the **Home** page, click the **My Requests** button at the top-left of the page next to the **Home** button.
2. You will be brought to the **My Requests** page. Click the **Create a Request** button under the **Create a Request** heading.
3. You will be brought to the **Add Request** page. Select the **Request Type** from the dropdown. Please note that the fields will be different based on the type of request selected, so be sure to choose the correct request type.
4. When finished, click the **Save Request** button at the bottom of the page.

*Note: **This does not submit your request; follow the steps under Submitting a Request to submit your request.** The request will save, and you can either click **Reload Form** to create another request or **Back to Requests** to go back to the previous page.*

Editing and Updating Requests

1. Under **Edit Request**, click **Edit** for the desired request you would like to update.
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 a Request

1. After saving your request, you will see it on the **My Requests** page under the **My Requests in Progress** heading.

My Requests in Progress

In this table, you can review all the requests you created and submit them to your department for review. Once a request is submitted it will no longer be editable. The department may return a request to you though. Your requests will remain viewable for reference throughout the process.

search by keyword	search				
Export	Add filters	50 per page			
View Details	Request Type	Status	Edit Request	Delete Request	Submit for Department Review
Test	Permanent / Temporary Enhancement	created	Edit	Delete	Submit for Department Review

- To search through your requests, use the **Search by Keyword** box underneath the **My Requests in Progress** heading.
 - To view the details of your request, click the title of your request.
 - To delete your request, click the **Delete** button on your desired request.
2. Click the **Submit for Department Review** button. Your request will automatically be submitted to the department for review.
 - To submit all saved requests with one click, click the **Submit All** button.

Note: Submitted requests will no longer be available for editing or deletion. However, they will remain viewable as a reference throughout the review process.

Submission History

1. After submitting a request to the department, your request will be saved under the **Submission History** heading shown below.

Logs

Title	Timestamp !?	Action	Submission Snapshot
testRequest2	11/15/2019 13:08	submit	Submission Snapshot

[My Deleted Requests](#)

- **Title** displays the name of the request you submitted.
- **Timestamp** displays the time which you submitted the request to your department.
- **Action** shows the action that was recorded in the log.
- **Submission Snapshot** provides you with a link, which will show you the details of your submission.

Additionally, the **My Deleted Requests** button will let you view the requests which you have deleted. On this page, you have several options for your deleted requests.

Requests

search by keyword

50 per page

Request Type	View Details !?	Description	Department	Undelete Request
Permanent / Temporary Enhancement	20191216	rationale for request	CAS-IT	Undelete

- **View Details** lets you look at the details of your submission.
 - **Undelete** lets you remove your deleted submission from the page and bring it back to **My Requests in Progress**.
2. Click **Back to My Requests** to go back to the home page.