

## ETF Request System User Guide

The ETF Request system is a web-based application designed for collection of equipment request data for submission and approval by the State Council of Higher Education for Virginia. This system is administered by the Office of Budget and Financial Planning.

The following set of instructions will instruct the user on how to use the ETF Request System to create, modify, and delete equipment requests, and reporting features.

### Accessing the System

The ETF Request system can be accessed by clicking the Equipment Trust Fund Phase 38 link on the Office of Budget and Financial Reporting website: <https://www.obfp.vt.edu/budgetprocesses/etf.html>. To access the system the user must have a current Virginia Tech PID and password and be a designated ETF Request System user.

### Create Report

To view a detailed report of the requested equipment for a department or senior management perform the following steps:

1. Click the Create Report link from the navigation bar.
2. On the Report Creation screen, select the type of report you would like to create.
3. Select the department or senior management that you would like the report to use.
4. Press the Download Report button. The report will be generated on screen.
5. User may print the report or save it as an Excel, PDF, or Word document.

### Steps to access the system:

1. Navigate to the ETF Request System authentication page via Login.
2. Enter your Virginia Tech PID and password and press the Login button.
3. The New Request screen is displayed.

### Steps to add a new request:

1. Click the New Request link from the navigation bar.
2. Complete the following fields appropriately
  - a. Department Name – The department that is requesting the item. Must be within same senior management and only departments you have access to will show up in drop-down
  - b. Model – Provide a current model number for the requested equipment. This information may change at time of purchase; however, it is required for the approval process.
  - c. Description – Provide a brief description of the equipment. Please remember that this description should be singular in nature (i.e. Computer, Autoclave, etc.)
  - d. Manufacturer – Provide the name of the manufacturer (not the vendor)
  - e. Unit Price – Provide an estimate of the cost for the requested equipment.
  - f. Quantity – Number of requested equipment.
3. Press the Add Request button.

4. User will be notified that the request has been successfully saved.

User may also add request by using the modify table. At bottom of table you fill out fields just like the new request page. When all the information is entered, click the add button. User should see request loaded into table if valid request.

### Batch Upload

To upload multiple requests, you can use the batch upload function to import them at one time. To do this:

1. Download the ETF Batch Request Template from the ETF Budget Process homepage: <https://www.obfp.vt.edu/budgetprocesses/etf.html>.
2. Save the template to your computer and enter the requests that are to be made.
3. In the application, click the Batch Upload link from the navigation Bar.
4. Click the browse/choose file button and select the desired file to upload
5. Click the upload and view button. The requests will show on page in table. Review the requests and make sure the information is correct. Un-check the requests with errors.
6. Once ready, click save requests. User will be redirected to the Modify table where you can see the requests that were just saved.

### Steps to modify a previously entered request:

1. Click the Modify/Delete link from the navigation bar.
2. A list of equipment requests that you have access to will be displayed in a tabular format.
3. Find the equipment request that you would like to modify and press the edit link.
4. That equipment request edit text-boxes will be displayed with the requested information. Modify this information as needed.
5. Press the Update button when finished.
6. User should see the changes made in the table if so the request has been successfully modified.

### Steps to delete a previously entered request:

1. Click the Modify/Delete link from the navigation bar.
2. A list of equipment requests that you have access to will be displayed in a tabular format.
3. Find the equipment request that you would like to delete and press the Delete link.
4. Press OK on the confirmation popup to delete the request.
5. User should not see the request in the table now, if so- that verifies that the deleted equipment is no longer present.

### Contact Information

The ETF Request System is administered by Finance Information Technology. Please refer to the following contact list when assistance is needed:

For general policy related questions related to the current ETF phase contact **Sylvia Conner** at [sconner@vt.edu](mailto:sconner@vt.edu) or 540-231-7450. For help with technical problems contact email [fitdev@vt.edu](mailto:fitdev@vt.edu).