

# CBAT Job Aid - 5

## How to Submit a New User Request for CBAT

- 1) The supervisor over capital in the department will need to submit a service ticket via the BAT and CBAT Incident Report website [https://www.miamidade.gov/global/service.page?Mduid\\_service=ser1530303404128210](https://www.miamidade.gov/global/service.page?Mduid_service=ser1530303404128210)

Miami-Dade County continues to monitor coronavirus (COVID-19). [Get the latest updates.](#) Calendar

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## Budgeting Analysis Tool

The Budgeting Analysis Tool, or BAT, is a budget planning and development application that serves as an all-in-one solution for forecasting, preparing, monitoring and reporting on departmental budgets.

With an eye towards full integration with the Enterprise Resources Planning system, BAT consolidates information from all County human resources and financial utilities – including FAMIS, PeopleSoft and the system used by Public Housing and Community Development – while enabling employees involved in budget preparation to operate on a single platform.

BAT's key functions and features

- Create transparency by enabling users to view division budget information prior to inputting data into the system.
- Automate updates to tables of organization, manage position vacancies, automatically calculate salary and fringe costs.

### ONLINE OPTIONS

- BAT AND CBAT INCIDENT REPORT
- PEOPLE SOFT

2) Upon selecting the "BAT and CBAT Incident Report" icon, the USER will automatically be taken to the page below with his or her information already prepopulated

## BAT and CBAT Incident Report

[Back to Service Requests](#)

### Requested By

Gibboney, Anita (OMB)

### Date & Time

01/25/21 03:32 PM

### Submitting On Behalf of Someone Else?

### Employee Number

156429

### User Display Name

Gibboney, Anita (OMB)

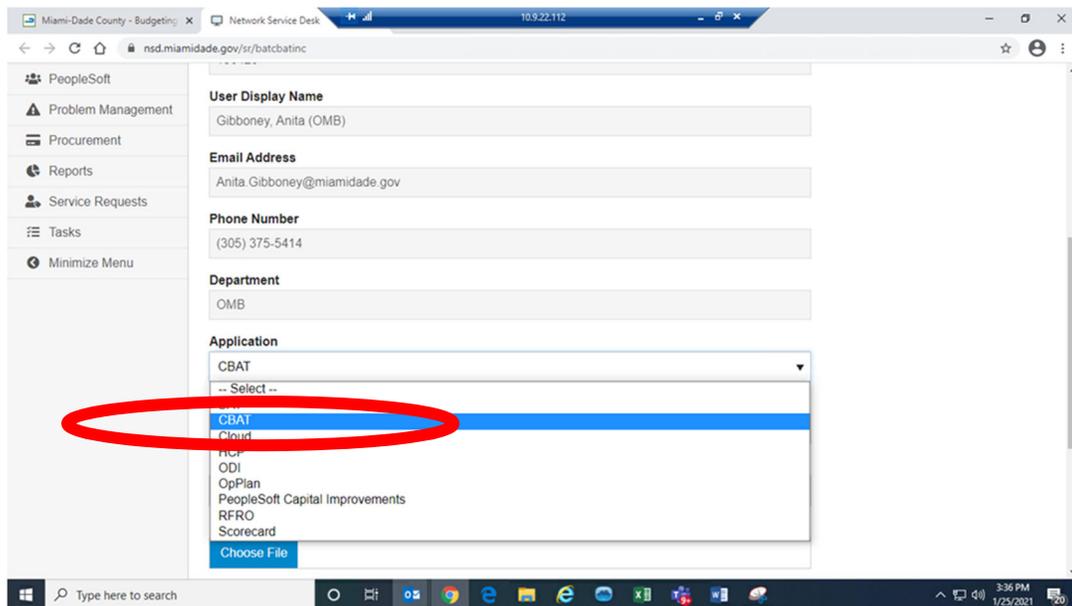
### Email Address

Anita.Gibboney@miamidade.gov

### Phone Number

(305) 375-5414

3) Next, the USER will need to select the application type



4) Next, the reporting USER will need to select from the "Category" dropdown menu "Security System Access"

The screenshot shows a web browser window with the URL [nsd.miamidade.gov/sr/batcbatinc](http://nsd.miamidade.gov/sr/batcbatinc). The form contains the following fields:

- Email Address:** Anita.Gibboney@miamidade.gov
- Phone Number:** (305) 375-5414
- Department:** OMB
- Application:** CBAT
- Category:** A dropdown menu is open, showing options: -- Select --, Select --, Enhancement, Data, Functionality, Infrastructure, **Security/System Access** (highlighted with a red circle), and Training.
- Add Comments:** 1024 chars max

5) And then, the USER will need to select from the "Priority" dropdown menu the priority level for the need

The screenshot shows the same web browser window. The 'Priority' dropdown menu is now open, showing options: Normal, Low, **Normal** (highlighted with a red circle), and High.

Below the 'Priority' dropdown, the 'Add Comments' field is visible, followed by the 'Email Preferences' section, which includes a checked checkbox for 'Send an Email Notification' and a plus sign for 'Email Additional Users'.

**6) After all the above has been appropriately selected, the USER must then add in the "Add Comments" box the following information**

- i. The full name of the User to be granted security access to CBAT
- ii. Their Department
- iii. The employee's identification number i.e. e308127
- iv. and lastly, the Type of access being requested
  - 1. Read
  - 2. Write

The screenshot shows a web form with several sections. At the top is an 'Upload files' section with a 'Choose File' button. Below that is the 'Add Comments' section, which is circled in red. The text in this section reads: 'Anita Gibboney', 'Office of Management and Budget', 'e156429', and 'Please grant write access'. Below the comments section is an 'Email Preferences' section with two options: 'Send an Email Notification' (checked) and 'Email Additional Users' (with a plus icon and '1 user added'). At the bottom is a 'Submit' button.

**7) And lastly, include the email address of the new USER to which access is being requested for.**

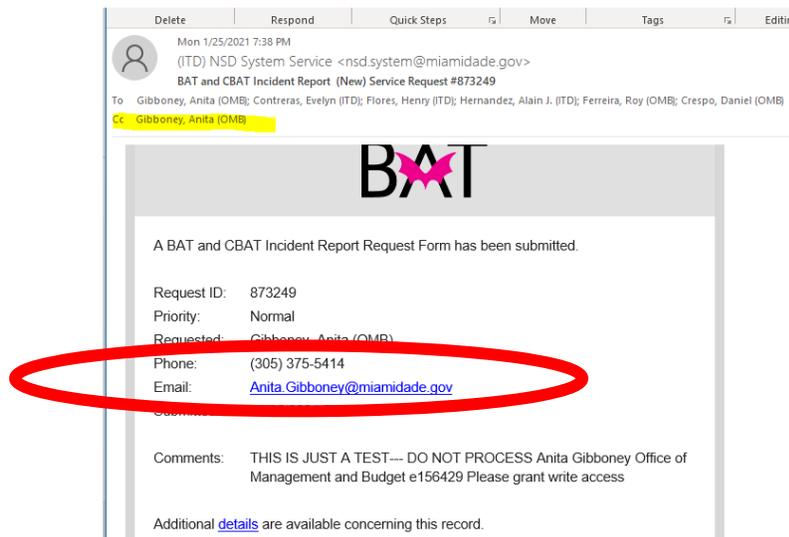
This screenshot is identical to the one above, showing the same web form. However, the red circle highlights the 'Email Preferences' section instead of the 'Add Comments' section. The text in the 'Add Comments' section remains the same: 'Anita Gibboney', 'Office of Management and Budget', 'e156429', and 'Please grant write access'. The 'Email Preferences' section shows 'Send an Email Notification' checked and 'Email Additional Users' with a plus icon and '1 user added'. A 'Submit' button is at the bottom.

**8) Once all the information above has been accurately reflected, the submitter must CLICK the "Submit" button to process the request**

The screenshot shows a web form with the following sections:

- Upload files**: A blue button labeled "Choose File".
- Add Comments**: A text area containing the text: "Anita Gibboney  
Office of Management and Budget  
e156429  
Please grant write access".
- Email Preferences**: A section with two options: "Send an Email Notification" (checked) and "Email Additional Users" (with a plus icon and "1 user added").
- Submit**: A blue button at the bottom, circled in red.

**9) As soon as the Incident Report has been submitted, all the individuals identified in section 7 will receive an email notification similar to the email below advising them a request has been submitted**



**10) The following day, the CBAT Administrative Team will receive notification of the request thru a service ticket similar to what is seen below**

**Escalation: Service Requests Aged >= 5 days**

This is a daily report which contains a summary of the service requests assigned to groups that you manage that have not been completed and have an age greater than or equal to 5 days. There are currently **2** open service requests that have been escalated for your review.

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SR #	<a href="#">864728</a>
Submitted On	01/13/2021
Submitted By	Rodriguez, Emma (DTPW)
SR Age (Days)	9
SR Status	New
Form	BAT and CBAT Incident Report
Assigned To	Hyperion BAT

SR #	<a href="#">866346</a>
Submitted On	01/14/2021
Submitted By	Melean, Sandra (DTPW)
SR Age (Days)	8
SR Status	New

**11) Upon receiving the daily "Service Ticket" report, the CBAT Administrative Team will be able to review the report and review the issues by simply clicking on the blue SR# hyperlink**

The SR# hyperlink will allow the CBAT Administrative Team to open the service tickets and review the issue at hand

Delete | Respond | Quick Steps | Move | Tags

Fri 1/22/2021 7:30 AM

 NSD System Account (ITD) <nsdSystemAcc@miamidade.gov>

Escalation: Service Requests Aged >= 5 days

To: Gibboney, Anita (OMB)

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**12) Once the CBAT Administrative Team has addressed the issue and/or request at hand, the team will then need to update the "Process Request" section by selecting an option from the "Status Update" drop down menu**

Should the CBAT Administrative Team select "Complete" from the drop-down menu, this will close the service ticket out

If the team wishes to add a comment, they can do so by typing in the "Add Comments" section below

