

Angelo State University
Strategic Planning On-Line (SPOL) - Budget Section Training
Quick-Start Guide
March 2011

<http://pba.angelo.edu/spolnet/>

Budget Section Overview

The Budget Section of SPOL manages both operational (cost-to-continue) budgets as well as enhanced budgets. This section enables budget managers to manage their operational budgets, review historical budget data, and manage the enhanced budget requests automatically rolled forward from Strategic Planning Objectives. The Budget Section also gives the financial team the ability to drill down through budget requests to see how each request related to ASU's Goals and Institutional Priorities. This gives financial administrators the information and visibility needed to make critical funding decisions. The main functions of the Budget Section are directly represented in the Budget Homepage.

The Budget Homepage

The Budget Homepage is a launching pad for the budgeting functions of SPOL. From the Budget Homepage budget managers can manage their departmental budgets and align them with Angelo State University's institutional budget policies. Administrators can review and approve budgets with transparency and clarity. The Budget Homepage has several menus indicated below. Users may not see all menu items depending on their security permission and role in the system.



Budget Homepage

Budget Homepage menus

1. My Budget Review

The “My Budget Review” menu item links to the “My Budget Search” page. Under this menu users can locate and select their budget account by planning unit for review or editing. The budget review is where budget managers develop their operational and enhanced budgets.

2. Approve My Budgets

The “Approve My Budgets” menu item links to the “Approve My Budgets” page where a list of budget accounts organized by planning unit is customized specifically for the current user. On this page unit managers and budget managers can review summaries of their budgets (and their subordinates’ budgets) and approve or reject the budget *en mass*. Only system administrators and unit managers with the appropriate security permissions can see this menu item. Some users will not see this menu item.

3. Print a Report

This menu item is a quick link to the Reports page.

My Budget Search Page

Click into “My Budget Review” to view the “My Budget Search” page.

The screenshot shows the Strategic Planning Online (SPOL) interface. At the top, it displays the version number 'v3.3.5.13' and the date 'Monday, March 21, 2011'. The main header includes the SPOL logo and the text 'Strategic Planning Online™ Empower Your Planning Process'. The user is identified as 'Maurice Fortin (edit)' from 'Angelo State University'. A dropdown menu shows 'Fortin, Maurice' with options for 'Impersonate' and 'Cancel Impersonate'. The 'Planning Year' is set to '2011-2012'. A navigation bar contains links for 'My SPOL', 'Planning', 'Budget', 'Assessment', 'Accreditation', 'Resources', 'Reports', 'Support', and 'Log Off'. The breadcrumb trail is 'My SPOL > Budget > My Budget Review'. The sidebar has a 'Budget' section with options: 'My Budget Review', 'Approve My Budgets', and 'Print a Report'. The main content area is titled 'My Budget Review for Planning Year 2011-2012' and includes a 'Back' button. Below this, there is a section for 'My Budget Accounts' with a table showing budget details for the 'Library' planning unit.

Planning Unit	Unit Manager	% Change	\$ Change
Library	Fortin, Maurice	-100.0%	-\$3,859,119
Budget Title		% Change	\$ Change
Eva Tucker West Texas Collection		-100.0%	-\$4,542
General Contingency 0110		0.0%	\$0
Library 0100		-100.0%	-\$477,859
Library Books/ Periodicals/ Binding 0010		-100.0%	-\$6,650
Library Books/ Periodicals/ Binding 0075		-100.0%	-\$692,350
Library Operations 0010		-100.0%	-\$488,848
Library Operations 0110		-100.0%	-\$818,394
Library Services 0110		-100.0%	-\$17,000
Library Services Rev 0110		-100.0%	-\$1,311,476
Software Maintenance Library 0120		-100.0%	-\$42,000

My Budget Search page

My Budget Search page

On this page users can locate and select their budget accounts and planning unit for review or editing. The list of planning units is broken down into three main categories (you may or may not see all three depending on your role in the various planning units):

My Budget Search – Budget Account Categories

1. My Budget Accounts

This area presents a list of budget accounts by planning unit that the current user is directly responsible for managing.

2. Budget Accounts that I am a Member Of

This area presents a list of budget accounts by planning unit that the current user is collaterally responsible for managing as a member of the planning unit, but not the unit manager.

3. Budget Accounts that Report to Me

This area presents a list of budget accounts by planning unit that report directly to the current user, but that the current user is not directly responsible for as the immediate unit manager.

The screenshot shows the Strategic Planning Online (SPOL) interface. The user is Angelina Wright, an Associate Vice President for Finance & Administration at Angelo State University. The page displays budget accounts for the 2011-2012 planning year. The 'My Budget Accounts' section shows a table with columns for Planning Unit, Unit Manager, % Change, and \$ Change. The 'Budget Accounts that I am a Member Of' section shows a similar table. The 'Budget Accounts that Report to Me' section shows a table with a 'Group By Planning Unit' checkbox and a list of budget accounts.

Planning Unit	Unit Manager	% Change	\$ Change
Assoc VP Finance and Administrator	Wright, Angelina	0.0%	\$0
Assoc VP Finance and Administrator	Wright, Angelina	-100.0%	-\$74,449,419
Budget Office	Wright, Angelina	-100.0%	-\$275,380
Staff Benefits	Wright, Angelina	-100.0%	-\$8,757,630

Planning Unit	Unit Manager	% Change	\$ Change
Human Resources	Neal, Kurtis	-100.0%	-\$610,788
Payroll Services	Brooks, Shonda	-100.0%	-\$7,000
Student Service Fee Committee	Mears, Philip	-100.0%	-\$3,359,250
UBAT (University Budget Advisory T Limbaugh, James			\$0

Planning Unit	Unit Manager	% Change	\$ Change
Assoc VP Finance and Administrator	Wright, Angelina	-100.0%	-\$74,449,419
Budget Office	Wright, Angelina	-100.0%	-\$275,380
Human Resources	Neal, Kurtis	-100.0%	-\$610,788
Payroll Services	Brooks, Shonda	-100.0%	-\$7,000
Staff Benefits	Wright, Angelina	-100.0%	-\$8,757,630

My Budget Search page

Budget Account Indicator

The budget account indicator is a graphic arrow next to the planning unit indicating that budget account records exist under the associated planning unit. If you do not see a budget account indicator arrow next to a planning unit, it means that no budget accounts exist under the associated planning unit. If you see a budget account indicator arrow next to a planning unit, click on the planning unit's row to drop down a list of the budget accounts associated with it:

My Budget Review for Planning Year 2011-2012 [Back](#)

Click on a Planning Unit to view its associated Budgets.
Once displayed, click on a Budget to view or edit the detail.

My Budget Accounts

Planning Unit	Unit Manager	% Change	\$ Change
Contract Admn Receiving Procureme	Lennon, Jennifer		\$0
▼ Mail Services	Lennon, Jennifer	-100.0%	-\$84,779
Budget Title			
		% Change	\$ Change
Mail Services 0100		-100.0%	-\$84,779
Materials Management	Lennon, Jennifer		\$0
▶ Materials Management, Office	Lennon, Jennifer	-100.0%	-\$551,055
Travel Office	Lennon, Jennifer		\$0

Budget Accounts that I am a Member Of

Budget Account Indicator

Once you have located the budget account you wish to edit, double click on the budget account to navigate to the “Budget Detail” page in view mode. From this page you can view or edit the budget account you’ve selected.

Budget Account Detail Page

The budget accounts detail page display a single budget account’s budget requests by GL with detailed and summary information about the budget account. This page allows users to view and edit their budget requests, review their historical spending information, and create new requests for both their operational and enhanced budgets as needed. ***The budget account detail page is one of the few pages that combines both the view and edit mode in one page.***

Budget Detail Page Areas – A Closer Look

Each area of the budget account details page is responsible for managing different information about the budget account’s budget requests. The budget account details page allows users to review and edit their budgets and approve budgets they are responsible for.

Budget Detail

Account Title: Budget and Payroll Services 0010
 Unit Manager: Wright, Angelina
 Planning Unit: Budget Office

Planning Year: 2011-2012
 Account Number: 0010 - 33290 -

GL Code	2009-2010 Expenditures	2010-2011 Initial	2010-2011 Modified	2010-2011 Curr Yr Exp	2011-2012 Proposed	2011-2012 % Change	2011-2012 Enhanced	2011-2012 Total	2011-2012 Approved
7010S	\$126,586	\$133,776	\$133,776	\$66,888	\$0	-100%	\$0	\$0	\$0
7020S	\$1,720	\$2,400	\$2,400	\$960	\$0	-100%	\$0	\$0	\$0
Mand O	\$0	\$0	\$0	\$0	\$0	0%	\$0	\$0	\$0
Salaries	\$128,306	\$136,176	\$136,176	\$67,848	\$0	-100%	\$0	\$0	\$0
Student Wages	\$0	\$0	\$0	\$0	\$0	0%	\$0	\$0	\$0
Benefits	\$0	\$0	\$0	\$0	\$0	0%	\$0	\$0	\$0
Revenue	\$0	\$0	\$0	\$0	\$0	0%	\$0	\$0	\$0
Totals	\$128,306	\$136,176	\$136,176	\$67,848	\$0	-100%	\$0	\$0	\$0

Print Budget | Print Notes | Print Forecasted Budget | Print Enhanced Budget | Print Proposed Budget

For Budget Admin Use Only
 Approve Single GL Code Totals | Approve Budget Totals

Budget Detail page

1. The Budget Approval Area

The Budget Approvals Area allows unit managers to approve their budgets and make it available for the next unit manager to approve.

2. The Budget Details Area

The Budget Details Area displays pertinent information about the budget such as the Account Title, the Unit Manager, the Planning Unit and Account Number.

3. The Main Budget Grid Area

The Main Budget Grid displays current budget requests and historical budget information by GL Code and category. Users edit and review their budgets in the Main Budget Grid.

4. The Budget Summary Grid Area

The Budget Summary Grid displays current requests and historical budget information regrouped by classification. This information helps users manage their budget requests by classification and provides the financial team greater visibility as to how the budget requests are classified overall. New Budget Summary classifications can be created by system administrators.

5. The Budget Button Area

This area has several buttons for printing budgets and approving budgets. Different users will see different buttons as their security permissions may vary.

6. Budget Admin Use Only

This area is for the use of budget administrators only. It allows an administrator to approve single line items or the entire budget.

Budget Detail Area has the following elements:

3.

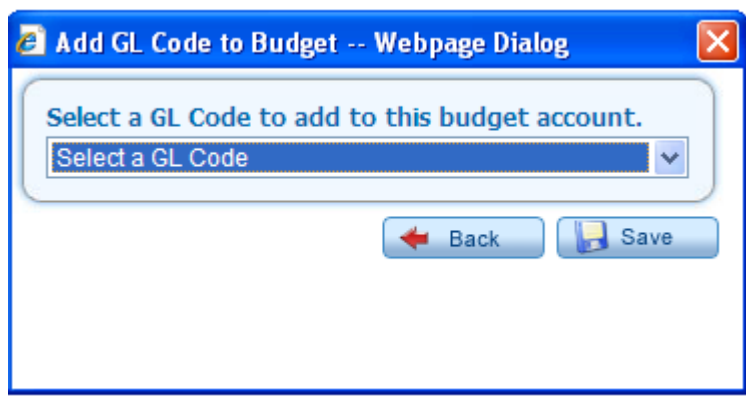
2.

GL Code	2009-2010 Expenditures	2010-2011 Initial	2010-2011 Modified	2010-2011 Curr. Yr. Exp.	2011-2012 Proposed	2011-2012 % Change	2011-2012 Enhanced	2011-2012 Total	2011-2012 Approved
7010S	\$126,586	\$133,776	\$133,776	\$66,888	\$0	-100%	\$0	\$0	\$0
7020S	\$1,720	\$2,400	\$2,400	\$960	\$0	-100%	\$0	\$0	\$0
Mand O	\$0	\$0	\$0	\$0	\$0	0%	\$0	\$0	\$0
Salaries	\$128,306	\$136,176	\$136,176	\$67,848	\$0	-100%	\$0	\$0	\$0
Student Wages	\$0	\$0	\$0	\$0	\$0	0%	\$0	\$0	\$0
Benefits	\$0	\$0	\$0	\$0	\$0	0%	\$0	\$0	\$0
Revenue	\$0	\$0	\$0	\$0	\$0	0%	\$0	\$0	\$0
Totals	\$128,306	\$136,176	\$136,176	\$67,848	\$0	-100%	\$0	\$0	\$0

Budget Details area

1. Add GL Code Button

This button allows users to add a new GL Code to their budget. GL Codes are accounting codes used to classify expenditures. Clicking on this button will bring up the “Add GL Code Pop-Up Window” as seen below:



Add GL Code pop-up window

To add a GL code, select it in the drop down list box and click on the “Add” button. To cancel, click on the “back” button. Either action will make the “add GL Code Pop-Up Window” disappear.

Important Note: If for any reason you cannot access the “Add GL Code Pop-Up Window” check your security settings for pop-up blocking. Pop-up blockers will disable the “add GL Code Pop-up Window” from Displaying correctly.

2. Remove GL Code Button

This button allows users to remove the GL Code currently selected in the Main Budget Grid from the budget account. To select a GL Code, click on its row in the Main Budget Grid (you will see the row change color to indicate that it is selected), then click on the “Remove GL Code” button. This action will remove the GL code and delete all budget requests associated with the GL code in the current Budget Account.

Important Note: Budget requests associated with the GL Codes being removed are deleted and cannot be recovered once they are deleted.

3. Account Title, Unit Manager, Planning Unit, Account Number

These fields are read only and cannot be modified from this page.

Main Budget Grid

The Main Budget Grid displays current budget requests and historical budget information by GL Code and category. In the Main Budget Grid users can manage their budgets and drill down to review individual expenditures. Users can also review the Main Budget Grid to see which requests were approved and the approval amounts after the budget approval process has occurred. Rows on the Main Budget Grid's columns are fixed system data, detailed below:

Strategic Planning Online™
Empower Your Planning Process

Monday, March 21, 2011
Angelina Wright (edit)
Associate Vice President for Finance & Administration - Angelo State University

Wright, Angelina | Impersonate | Cancel Impersonate | Planning Year: 2011-2012

My SPOL | Planning | Budget | Assessment | Accreditation | Resources | Reports | Support | Admin | Log Off

My SPOL > Budget > My Budget Review > Associate VP Finance and Admin 0100

Budget Detail

Back | Approve

Approval Status:

Remove Approvals

Budget Details | Add GL Code + | Remove GL Code x

Account Title: Associate VP Finance and Admin 0100
Unit Manager: Wright, Angelina
Planning Unit: Assoc VP Finance and Administration, Office

Planning Year: 2011-2012
Account Number: 0100 - 60030 -

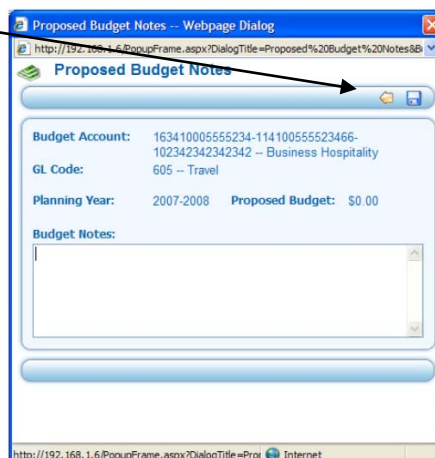
GL Code	2009-2010 Expenditures	2010-2011 Initial	2010-2011 Modified	2010-2011 Curr Yr Exp	2011-2012 Proposed	2011-2012 % Change	2011-2012 Enhanced	2011-2012 Total	2011-2012 Approved
7010S	\$111,641	\$120,000	\$121,500	\$61,500	\$0	-100%	\$0	\$0	\$0
7020S	\$2,160	\$2,280	\$2,280	\$1,080	\$0	-100%	\$0	\$0	\$0
7100P	\$2,849	\$3,000	\$2,790	\$949	\$0	-100%	\$0	\$0	\$0
M and O	\$2,849	\$3,000	\$2,790	\$949	\$0	-100%	\$0	\$0	\$0
Salaries	\$113,801	\$122,280	\$123,780	\$62,580	\$0	-100%	\$0	\$0	\$0
Student Wages	\$0	\$0	\$0	\$0	\$0	0%	\$0	\$0	\$0
Benefits	\$0	\$0	\$0	\$0	\$0	0%	\$0	\$0	\$0
Revenue	\$0	\$0	\$0	\$0	\$0	0%	\$0	\$0	\$0
Totals	\$116,650	\$125,280	\$126,570	\$63,529	\$0	-100%	\$0	\$0	\$0

Print Budget | Print Notes | Print Forecasted Budget | Print Enhanced Budget | Print Proposed Budget

Main Budget Grid

The Main Budget Grid has the following column fields:

- GL Code**
 This column contains the GL codes assigned to this budget account. GL Codes can be added or removed by using the “Add GL Code” and “Remove GL Code” buttons.
- Expenditures(Historical Data)**
 Captures last completed full year of expenditures for historical reference only.
- Initial (Historical Data)**
 This column displays this year’s initial budget as of 9/1. This is historical information imported into the system and cannot be modified from this page.
- Modified**
 Represents the Banner 9/1 budget load, plus/minus any budget adjustments entered, up to the point of data import into SPOL.
- Curr Yr Exp (Current Year Expense)**
 Represents the dollars spent and recorded in Banner up to the point of import into SPOL.
- Budget Notes**
 The budget notes columns display a series of small notepad icons. This allows users to enter and review notes about budget requests. To enter, double-click on the note icon to bring up the Budget Notes pop-up window. Enter in your note and click on the save icon. To exit without saving click on the yellow back button as seen below:



Budget Notes Pop-Up window

- **Proposed**
This column will tie back to base line budget. No increases are allowed over the original base line total. However you can change totals within the fund, between accounts.
- **% Change**
A system calculated field that displays the difference between the current year's Proposed Budget and last year's Initial Budget.
- **Enhanced**
Where the Budget Manager enters enhanced budget requests. This column displays enhanced budget requests totaled by GL Code. Budget requests made with Objectives via a Task Budget Request will automatically be brought forward into this field.
- **Total**
This is a system calculated field that displays the total of the Proposed Budget Requests and the Enhanced Budget Requests.
- **Approved**
System calculated field that displays the total of the Approved Budget Requests (both Proposed and Enhanced).

Making entries in the Enhanced Column

- Double click on the line you are wanting to enter data on
- A budget item detail list screen will pop-up.
- Choose the year you want to enter data on from the tabs across the top of the form

v3.3.5.13 Monday, March 21, 2011

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Angelina Wright (edit)
Associate Vice President for Finance & Administration - Angelo State University

Wright, Angelina **Planning Year:** 2011-2012

My SPOL | Planning | Budget | Assessment | Accreditation | Resources | Reports | Support | Admin | Log Off

My SPOL > Budget > My Budget Review > Associate VP Finance and Admin 0100 > Budget Item Detail List - forecasted

Budget Item Detail List - Forecasted

2011-2012 | 2012-2013 | 2013-2014 | 2014-2015

GL Code
7010S - Higher Education Salaries/Regular

Priority	Description	Qty	Cost Per Item	Total Cost	Commodity Type	Notes
Total:			\$0.00	Total Approved:	\$0.00	

Budget Item Detail List

Click on the New Budget Item button in the lower right of the form.

The new form will look like this:

v3.3.5.13 Monday, March 21, 2011

Strategic Planning Online™
Empower Your Planning Process

Angelina Wright (edit)
Associate Vice President for Finance & Administration - Angelo State University

Wright, Angelina **Planning Year:** 2011-2012

My SPOL | Planning | Budget | Assessment | Accreditation | Resources | Reports | Support | Admin | Log Off

My SPOL > Budget > My Budget Review > Associate VP Finance and Admin 0100 > Budget Item Detail List - forecasted > Enhanced Budget - Forecasted Detail

Enhanced Budget - Forecasted Detail

Planning Year: 2011-2012
GL Code: 7010S - Higher Education Salaries/Regular
Budget Account: 0100-60030-Associate VP Finance and Admin 0100

Priority: Select a Priority

Commodity Type: Select a Commodity Type Classroom: Yes No Upgrade: Yes No

Proposed			Approved		
Quantity	Price Per Item	Total Price	Quantity	Price Per Item	Total Price
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Justification: Not Funded

Associated Objective Information
Please assign a task

Priority - can be set to high, medium or low using the drop down menu options. Priorities can be set by ASU, so in the information this field and how it is used may vary.

Commodity Type - will have drop down options to choose from to describe the request.

- Salaries
- Faculty Salaries
- Maintenance & Operations

After all fields have been entered remember to save before returning to the main budget detail screen.