Submitting Self-Supporting Documentation using RebelDocs

RebelDocs is used to provide routing of backup documentation for self-supporting accounts. Backup documentation can include revenue schedules, items related to Board of Regents review or approval, or other department documentation to assist in providing context for items included in the next fiscal year budget.

Instructions on utilizing RebelDocs are below. If there are questions, please contact your assigned analyst or email fpba@unlv.edu.

1. Navigate to RebelDocs webpage - RebelDocs | RebelDocs
2. Log into RebelDocs using your ACE account credentials

![Log in to your ACE account](image)

3. Depending on the assigned role of the user, the steps for utilizing RebelDocs will vary; there are three different roles available to campus users
   - **Account Manager** – this role is mostly associated with the Account Manager responsible for creating the self-supporting budget in Anaplan and submitting associated documents
   - **Department Budget Manager / Director/Dean** – this role is generally associated with the user responsible for reviewing budget submissions from the Account Manager and will either approve or deny document submissions
     - If the Department Business Manager is submitting documentation, there is not a need to also have someone in
the Account Manager role as RebelDocs will record your submission

- For documents submitted by the Department Business Manager, RebelDocs will include your name as both the Submitter and Department Business Manager approval section (The Approval section will be visible only once the form is reviewed in the workflow – this section is not visible when the form is initially filled-in)

  - **Division Budget Manager** – this role is responsible for reviewing the documentation that the Account Manager or Department Business Manager has submitted, and has been approved by the Department Business Manager and will either approve or deny the documentation

- If the Division Budget Manager is submitting documentation, there is not a need to also have the Account Manager or Department Business Manager role

- For documents submitted by the Division Budget Manager, RebelDocs will include your name as both the Submitter and Department Business Manager approval section (The Approval section will be visible only once the form is reviewed in the workflow – this section is not visible when the form is initially filled-in)

4. The roles are listed in the order of review and approval

5. Once approved by the Division Budget Manager, the documentation will be submitted to Financial Planning, Budget & Analysis (FPBA)

6. Once a document has been initially submitted, no additional edits can be made to the submission - the document can be reviewed, then approved or denied

7. If changes are necessary, we recommend denying the submission and communicating with the Account manager to resubmit revised documentation

8. Once the document is received by Financial Planning, Budget & Analysis (FPB&A), the document will no longer be available to view and FPB&A will retain the copy
**Account Manager**

1. After logging in to RebelDocs, the Account Manager should see the following default screen

   ![Default Screen](image1)

2. Click on the ‘hamburger menu’ next to Document Retrieval in the top left, then select New Form

   ![New Form Menu](image2)
3. Next click on Worktag Documentation
4. Then a new window will appear on the right side of the screen

5. Enter your First and Last Name into the Submitter Details in the top section
6. Enter the account details associated with the documentation you are submitting
   ○ Follow same format as in the examples shown in red below the entry boxes
   ○ To aid in review and organization of documentation, only files associated with the account identified should be included

7. Select the Document group for the type of file that will be uploaded
8. A separate dialog screen will open to select the documentation to attach, select the file(s) and click Open

- Multiple documents can be attached at one time

9. In the Attachment Type Details, select the document type
10. For a Revenue Schedule attachment type, a new box will appear to select the appropriate revenue schedule. Once the appropriate revenue schedule type has been chosen the red will go away. Any other attachment type will not require additional information.

11. The Additional Information section is optional, but adding any additional comments will assist with review of submitted documentation.
12. Click Submit when ready to move forward to the next level of review

![Additional Information (optional)](image)

13. A message will appear while it saves your information

![Saving form](image)

14. If another form needs to be created to submit documentation for another account, then click ‘Yes’, otherwise click ‘No’. Do not log out until you see the following message and click No

![Message](image)

15. An email will be sent to the Department Budget Manager indicating documentation has been submitted for their review and action

![Message](image)
Department Budget Manager

16. For each form that is submitted for an account under their area, an email will be sent to the Unit’s Department Budget Manager.

17. The email will have instructions to review and approve the documentation submission.

18. Log into RebelDocs - RebelDocs | RebelDocs
19. Click on Worktag Documentation

20. Click on Open Workflow to review submitted forms
   ○ ‘New Form’ option under Document is for uploading documents

21. A new window will appear
22. Double-click on ‘FPBA Worktag Documentation Attachments’ in the left corner or Select the arrow and a new drop down will appear

23. Select the required Unit

24. Pending documents will appear in the box to the right

25. Select the form to review
26. The submitted form, with the attachments, can then be reviewed.

27. To review the actual documentation, the file(s) have to be downloaded:
   - PDF will open in a browser, while other types of documentation will have to be downloaded, and prompt will show.
28. In the Approval section, information about the Submitter of the form and documentation is shown

![Approval section](image)

29. Once reviewed, the form (and all associated forms) need to be approved or denied - this action is available at the top of the form
   - Selecting ‘Approve’ will progress the form and documentation to the Divisional Manager for review
   - Selecting ‘Deny’ will end the task and send an email notification to the Account Manager that the form and documentation submitted has been denied and by who
     - There is not a place to include a comment about why the form and documents were denied, so it’s important to communicate the denial reason outside of RebelDocs
     - Any denied forms and documentation will need to be resubmitted with the corrections

![Approval action options](image)
30. An email will be sent to the Division Budget Manager indicating documentation has been submitted for their review and action

**Division Budget Manager**

31. For each form that is submitted for an account under their area, an email will be sent to the Unit’s Department Budget Manager

32. The email will have instructions to review and approve the documentation submission

33. Log into RebelDocs - [RebelDocs](#) | [RebelDocs](#)
34. Select ‘Worktag Documentation’

35. Click the arrow and then select item that represents your role in the process

36. Select the form to review

37. The submitted form, with the attachments, can then be reviewed
38. To review the actual documentation, the file(s) have to be downloaded
   ○ PDF will open in a browser, while other types of documentation will have to be downloaded, and prompt will show

39. In the Approval section, information about the Submitter and Reviewer, of the form and documentation is shown
40. Once reviewed, the form (and all associated forms) need to be approved or denied - this action is available at the top of the form
   ○ Selecting ‘Approve’ will progress the form and documentation to Financial Planning, Budget & Analysis for review
   ○ Selecting ‘Deny’ will end the task and send an email notification to the Account Manager that the form and documentation submitted, has been denied and by who
     ■ There is not a place to include a comment about why the form and documents were denied, so it’s important to communicate the denial reason outside of RebelDocs
41. Any denied forms and documentation will need to be resubmitted with the corrections
42. Once reviewed, select to approve or deny

43. For forms and documentation that is approved by the Division Budget Manager, Financial Planning, Budget & Analysis will retain the form and attachments