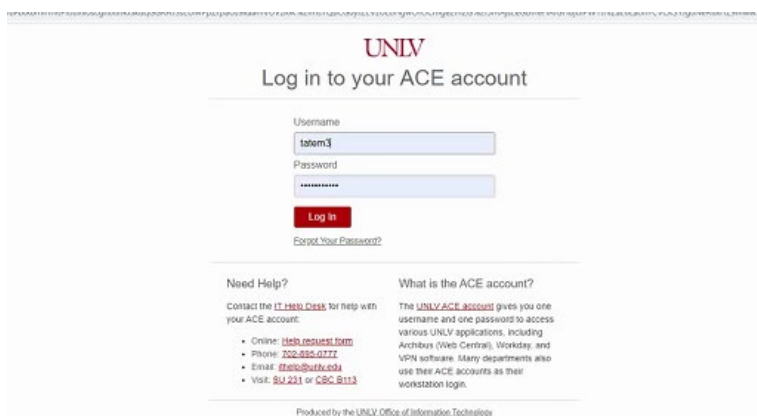


Submitting Self-Supporting Documentation using RebelDocs

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.

- Navigate to RebelDocs webpage - [RebelDocs | RebelDocs](#)
- Log into RebelDocs using your ACE account credentials



- 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

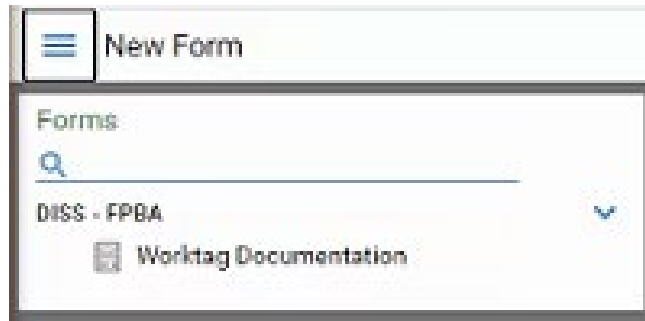
- If the Division Budget Manager is submitting documentation, there is not a need to also have the Account Manager or Department Business Manager role

- 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)

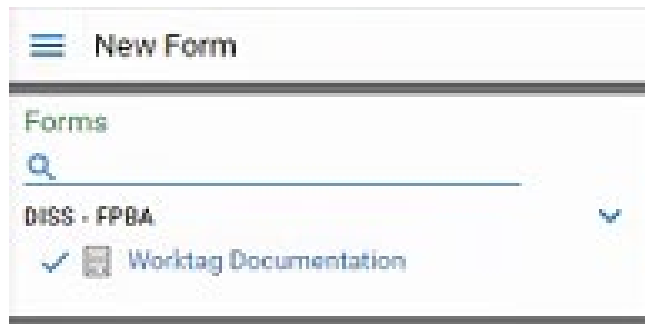
- The roles are listed in the order of review and approval
- Once approved by the Division Budget Manager, the documentation will be submitted to Financial Planning, Budget & Analysis (FPBA)
- Once a document has been initially submitted, no additional edits can be made to the submission - the document can be reviewed, then approved or denied
- If changes are necessary, we recommend denying the submission and communicating with the Account manager to resubmit revised documentation
- 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

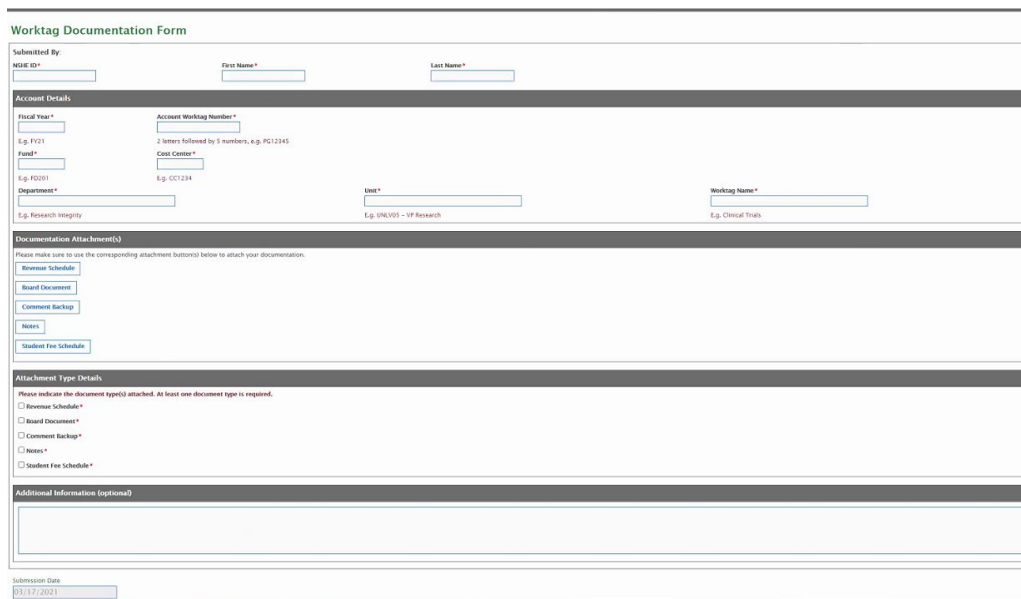
- After logging in to RebelDocs, the Account Manager should see the 'New Form' screen
- Click on New Form



- Click on Worktag Documentation



- Then a new window will appear



- Fill in your NSHE ID, First Name, and Last name

Note: NSHE ID will be used for future functionality that will be added to try and auto populate account information and validate the user credentials

The screenshot shows the top portion of a web form titled "Worktag Documentation Form" in green text. Below the title, there is a section labeled "Submitted By:" containing three input fields: "NSHE ID*" with the value "1231231231", "First Name*" with the value "Jane", and "Last Name*" with the value "Doe".

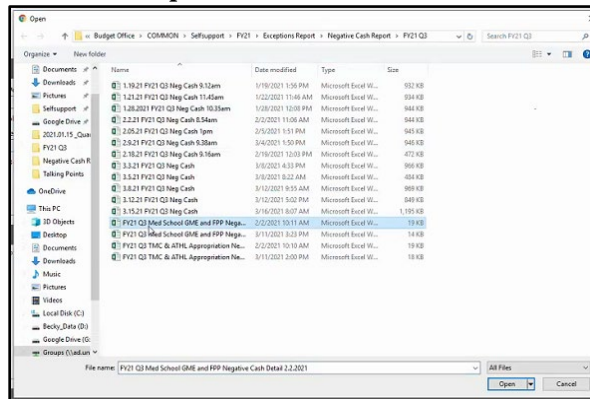
- Enter the account details associated with the documentation you are submitting
 - Follow same format as in the examples given
 - To aid in review and organization of documentation, only files associated with the account identified should be included

The screenshot displays the "Account Details" section of the form. It includes several input fields with labels and examples: "Fiscal Year*" (example: FY22), "Account Worktag Number*" (example: PG1111, note: 2 letters followed by 5 numbers, e.g. PG12345), "Fund*" (example: FD100, note: e.g. FD201), "Cost Center*" (example: CC1231, note: e.g. CC1234), "Department*" (example: Basket Weaving Under the Sea, note: e.g. Research Integrity), "Unit*" (example: UNLV55-Sample, note: e.g. UNLV05 - VP Research), and "Worktag Name*" (example: Making Great Baskets, note: e.g. Clinical Trials).

- Select the Document group for the type of file that will be uploaded

The screenshot shows the "Documentation Attachment(s)" section of the form. It features a heading "Documentation Attachment(s)" and a sub-heading "Please make sure to use the corresponding attachment button(s) below to attach your documentation." Below this, there are five buttons: "Revenue Schedule" (highlighted in blue), "Board Document", "Comment Backup", "Notes", and "Student Fee Schedule".

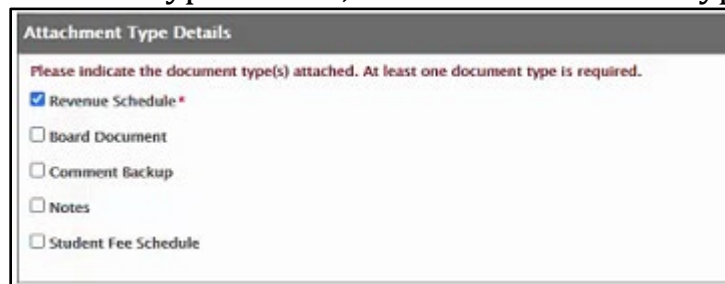
- A separate dialog screen will open to select the documentation to attach
- Select the file(s) and click Open



- Multiple documents can be attached at one time



- In the Attachment Type Details, select the document type



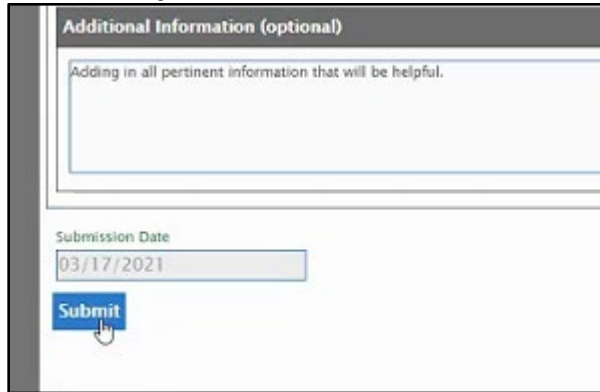
- For a Revenue Schedule attachment type, a new box will appear to select the appropriate revenue schedule
- Any other attachment type will not require additional information

<p>Please indicate the Revenue Schedule type attached. *</p> <ul style="list-style-type: none"> <input type="radio"/> Student Tuition and Fees <input type="radio"/> Sales and Service <input type="radio"/> Facilities and Administration Revenue <input type="radio"/> Investment/Endowment Income <input type="radio"/> Other Revenue <input type="radio"/> Proceeds from Bonds and Notes <input type="radio"/> Gifts (Restricted and Unrestricted) <input type="radio"/> Multiple Revenue Sources 	
<p>Attachment Type Details</p> <p>Please indicate the document type(s) attached. At least one document type is required.</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Revenue Schedule <input type="checkbox"/> Board Document <input checked="" type="checkbox"/> Comment Backup <input type="checkbox"/> Notes <input type="checkbox"/> Student Fee Schedule 	
<p>Please indicate the Revenue Schedule type attached. *</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> Student Tuition and Fees <input type="radio"/> Sales and Service <input type="radio"/> Facilities and Administration Revenue <input type="radio"/> Investment/Endowment Income <input type="radio"/> Other Revenue <input type="radio"/> Proceeds from Bonds and Notes <input type="radio"/> Gifts (Restricted and Unrestricted) <input type="radio"/> Multiple Revenue Sources 	

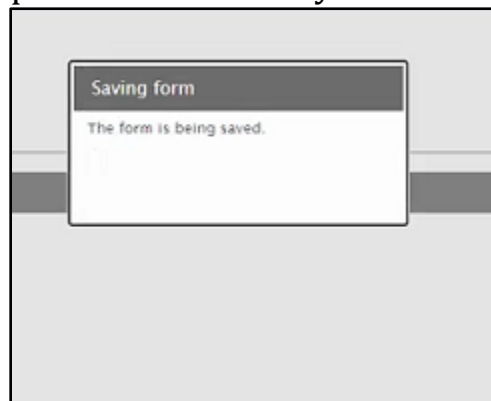
- The Additional Information section is optional, but adding any additional comments will assist with review of submitted documentation

<p>Additional Information (optional)</p> <p>Adding in all pertinent information that will be helpful.</p>
--

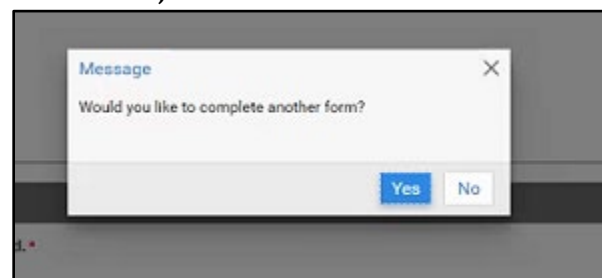
- Click Submit when ready to move forward to the next level of review

A screenshot of a web form titled "Additional Information (optional)". It features a large text area with the placeholder text "Adding in all pertinent information that will be helpful." Below this text area is a "Submission Date" field containing the date "03/17/2021". At the bottom left of the form is a blue "Submit" button with a mouse cursor hovering over it.

- A message will appear while it saves your information



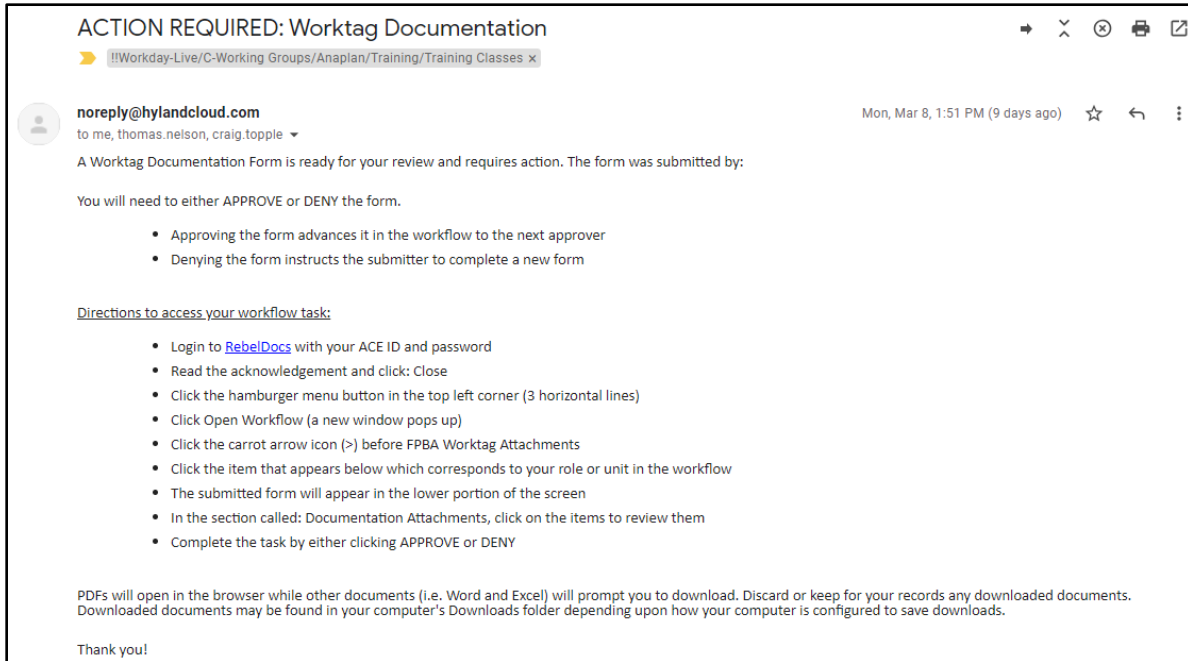
- If another form needs to be created to submit documentation for another account, then click 'Yes', otherwise click 'No'



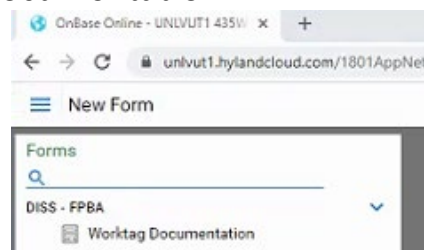
- An email will be sent to the Department Budget Manager indicating documentation has been submitted for their review and action

Department Budget Manager

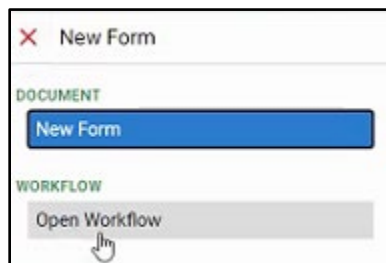
- For each form that is submitted for an account under their area, an email will be sent to the Unit's Department Budget Manager
- The email will have instructions to review and approve the documentation submission



- Log into RebelDocs - [RebelDocs](#) | [RebelDocs](#)
- Click on Worktag Documentation

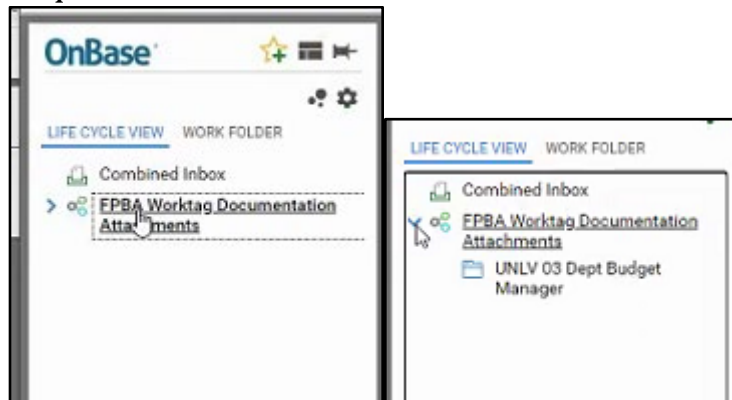


- Click on Open Workflow to review submitted forms
 - 'New Form' option under Document is for uploading documents

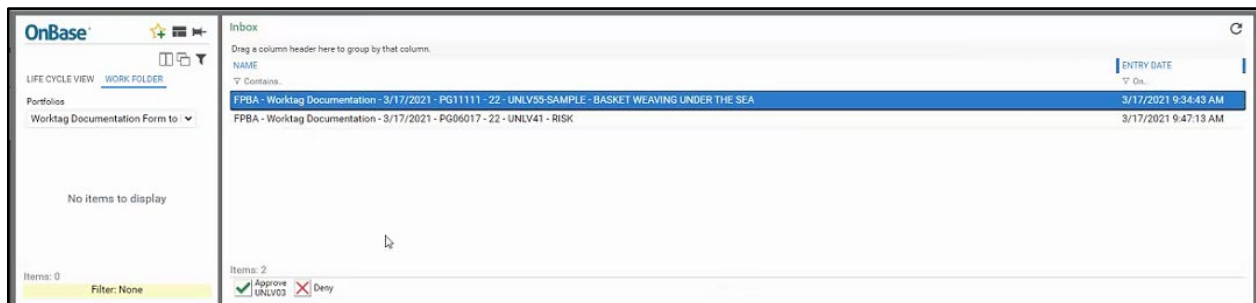


- A new window will appear

- Double-click on 'FPBA Worktag Documentation Attachments' in the left corner or Select the arrow and a new drop down will appear
- Select the required Unit



- Pending documents will appear in the box to the right
- Select the form to review



- The submitted form, with the attachments, can then be reviewed

- 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

Documentation Attachment(s) (3)

Please make sure to use the corresponding attachment button(s) below to attach your documentation.

[FPBA - Revenue Schedule - 3/17/2021](#)

[FPBA - Revenue Schedule - 3/17/2021](#)

[Revenue Schedule](#)

[Board Document](#)

[FPBA - Comment Backup - 3/17/2021](#)

[Comment Backup](#)

[Notes](#)

[Student Fee Schedule](#)

- In the Approval section, information about the Submitter of the form and documentation is shown

Approval

Dept Budget Manager Status	Dept Budget Manager	Date
Division Budget Manager Status	Division Budget Manager	Date
Submitter MELISSA.TATE@UNLV.EDU		
<input type="checkbox"/> Additional form(s) created by the submitter		
Submission Date 03/17/2021		

- 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

OnBase

Inbox

Drag a column header here to group by that column.

NAME	ENTRY DATE
FPBA - Worktag Documentation - 3/17/2021 - PG06017 - 22 - UNLV41 - RISK	3/17/2021 9:47:13 AM

Items: 0 Filter: None

Items: 1

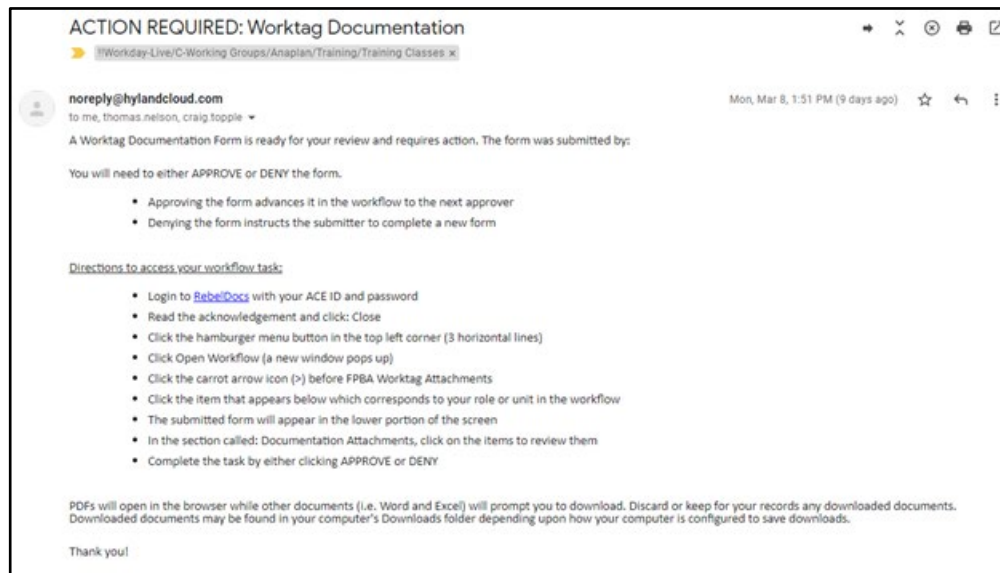
Approve UNLV03 Deny

This task will represent your approval of the form and advance it to your division budget manager(s).

- An email will be sent to the Division Budget Manager indicating documentation has been submitted for their review and action

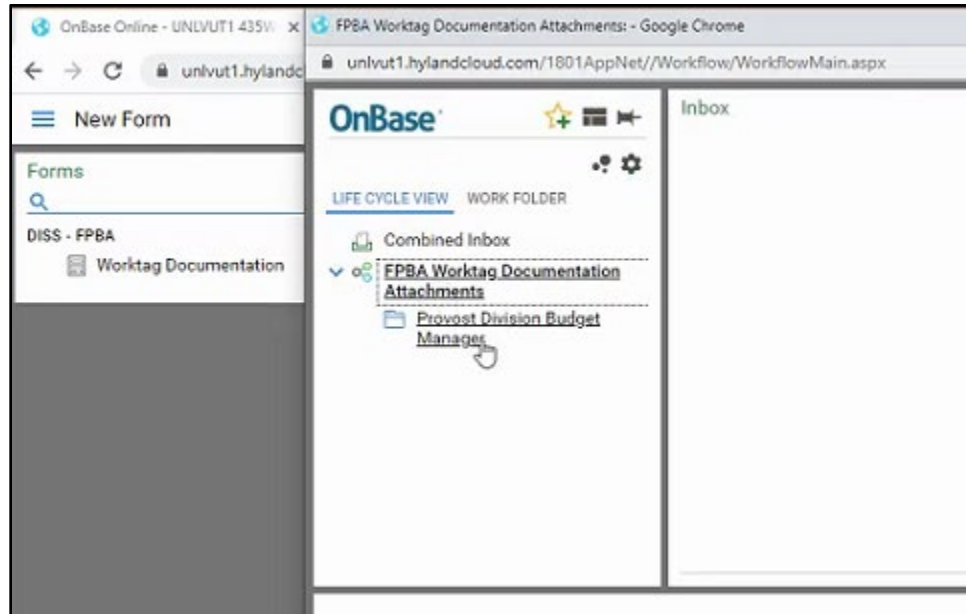
Division Budget Manager

- For each form that is submitted for an account under their area, an email will be sent to the Unit's Department Budget Manager
- The email will have instructions to review and approve the documentation submission



- Log into RebelDocs - [RebelDocs](#) | [RebelDocs](#)

- Select 'Worktag Documentation'
- Click the arrow and then select item that represents your role in the process



- Select the form to review



- The submitted form, with the attachments, can then be reviewed

- 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

Worktag Documentation Form

Submitted By:
 NSHE ID * First Name * Last Name *

Account Details

Fiscal Year * Account Worktag Number *
E.g. FY21 2 letters followed by 5 numbers, e.g. PG12345

Fund * Cost Center *
E.g. FD201 E.g. CC1234

Department * Unit * Worktag Name *
E.g. Research Integrity E.g. UNLV05 - VP Research E.g. Clinical Trials

Documentation Attachment(s) (3)

Please make sure to use the corresponding attachment button(s) below to attach your documentation.

FPBA - Revenue Schedule - 3/17/2021
 FPBA - Revenue Schedule - 3/17/2021

Board Document

FPBA - Comment Backup - 3/17/2021

Notes

Student Fee Schedule

- In the Approval section, information about the Submitter and Reviewer, of the form and documentation is shown

Approval

Dept Budget Manager Status Dept Budget Manager Date

Division Budget Manager Status Division Budget Manager Date

Submitter

☐ Additional form(s) created by the submitter

- 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
- Any denied forms and documentation will need to be resubmitted with the corrections
- Once reviewed, select to approve or deny

The screenshot shows the OnBase 'Inbox' interface. On the left, there is a sidebar with 'LIFE CYCLE VIEW' and 'WORK FOLDER' tabs. Below these, there is a 'Portfolios' section with a dropdown menu set to 'Worktag Documentation Form to'. The main content area displays a table of items. The table has columns for 'NAME' and 'ENTRY DATE'. The items listed are:

NAME	ENTRY DATE
FPBA - Worktag Documentation - 3/17/2021 - PG11111 - 22 - UNLV55-SAMPLE - BASKET WEAVING UNDER THE SEA	3/17/2021 9:51:50 AM
FPBA - Worktag Documentation - 3/17/2021 - PG06017 - 22 - UNLV41 - RISK	3/17/2021 9:53:19 AM
FPBA - Worktag Documentation - 3/17/2021 - PG12354 - 22 - UNLV55 - SAMPLE - BASKET WEAVING	3/17/2021 10:07:41 AM

At the bottom of the interface, there is an action bar with 'Items: 0' and a 'Filter: None' button. To the right, there are 'Approve Form' and 'Deny Form' buttons. A tooltip for the 'Approve Form' button reads: 'This task will represent your approval of the form and advance it to the Office of Financial Planning, Budget, & Analysis.'

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