

CampusGroups Budgeting Guide

Types of Budgets

1 - Mass Funding Budget

Budget Periods

In this scenario:

- *Test Budget 2* is the main Mass Funding budget
- *SEC Fall 2020 Reserves Rolling Funding* is for co-sponsorships from SEC to other groups
- *Group Funds Usage ONLY Rolling Budget-FY21* is for withdrawals from club/revenue funds if you are not using allocated funds at all.

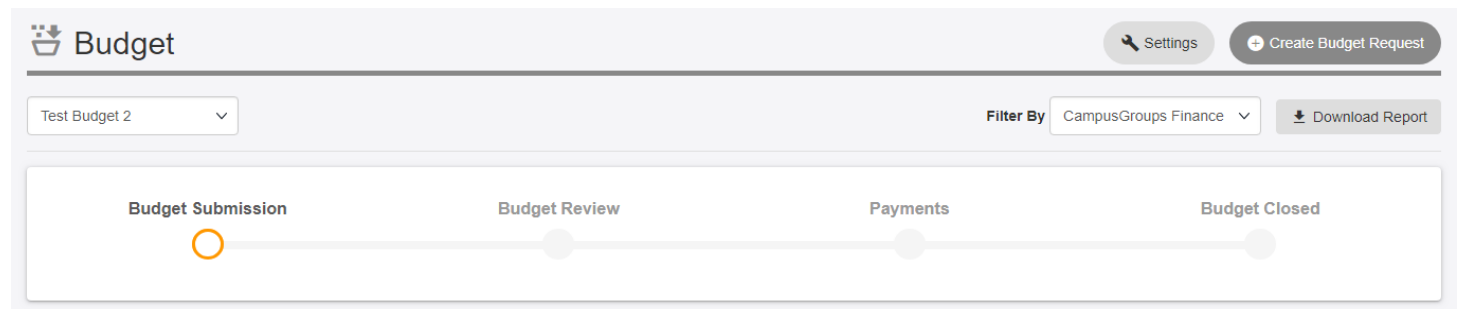
It is important that you have the proper budget selected to complete the tasks correctly.

Budget Stages

In your Mass Funding budget, there are 4 stages:

1. Budget Creation/Submission
2. Budget Review
3. Payments
4. Budget Closed

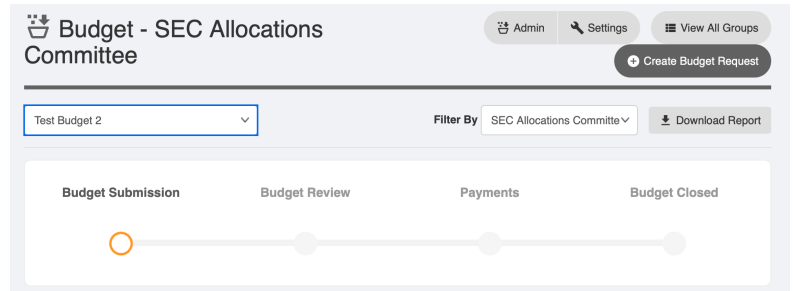
Changes in budget stage are made by the Campus Finance team.



The screenshot shows the 'Budget' interface. At the top left, there is a 'Budget' header with a trash icon. To the right are 'Settings' and 'Create Budget Request' buttons. Below the header, there is a dropdown menu showing 'Test Budget 2'. To the right of this is a 'Filter By' dropdown set to 'CampusGroups Finance' and a 'Download Report' button. The main part of the interface is a progress bar with four stages: 'Budget Submission', 'Budget Review', 'Payments', and 'Budget Closed'. The 'Budget Submission' stage is currently active, indicated by an orange circle around its progress indicator.

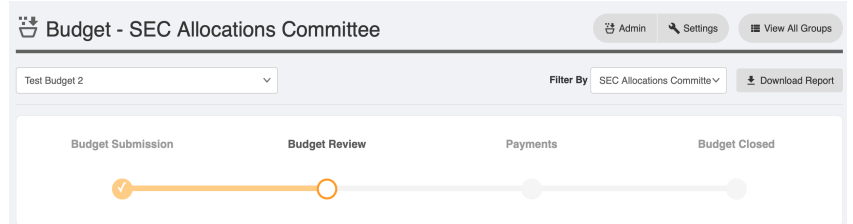
Stage 1: Budget Submission

During the **Budget Submission** stage, groups who have access to your budget can submit their group's budget for review. Applicants can edit their submissions until the date and time the group allocating the funds has decided to close the creation stage.



Stage 2: Budget Review

After the budget submission stage has closed and budget creations are no longer allowed, you can move into the **Budget Review** stage. This is where you can go through and approve the various line items from each group's individual budgets, similar to the regular mass funding process.



Comments can be added for each line item, detailing the reasons for cuts.

Clicking on **View All Groups** will allow you to see all submissions for the budget period in one list:

GROUP	REQUEST	BUDGET ID	Name	Required (\$)	Approved (\$)	Status	D
Campus Groups	[Request Details]	BUDGET 11876	Item 1	50	50	Approved	
			Item 2	50	50	Approved	
			Item 3	50	50	Approved	
			Item 4	50	50	Approved	
SEC Allocations Committee	[Request Details]	BUDGET 11876	Item 1	100	100	Approved	
			Item 2	100	100	Approved	
			Item 3	100	100	Approved	
			Item 4	100	100	Approved	
			Item 5	100	100	Approved	
			Item 6	100	100	Approved	
			Item 7	100	100	Approved	
			Item 8	100	100	Approved	
			Item 9	100	100	Approved	
			Item 10	100	100	Approved	
			Item 11	100	100	Approved	
			Item 12	100	100	Approved	
Undergraduate University Collaborative	[Request Details]	BUDGET 11876	Item 1	50	50	Approved	

Event Review

This is what the review page looks like for an event. Here you can input an amount to be approved and also include notes as to why you approved that amount. The **Total Funds Needed** column shows what the group is requesting from you, while the **Requested** column is the amount needed for the whole line item. A club fund column will be added in the future.

#ID	REQUEST	BUDGET ITEMS			APPROVAL		
		Name	Total Funds Needed	Financed By Group	Requested	Approved	Notes
35944	Fall Retreat Event - Retreat (internal only event) Priority - medium This is an internal event where we bring all members together to discuss our plans and goals for the semester in addition to group bonding activities. Submitted By Jared Heller Dec 02, 2020 11:20 AM Event Details Thwing Ballroom Sep 12, 2020 - Sep 12, 2020 50	Food - Pizza/Snack	150.00	0.00	150.00	100.00	
		Food - Lunch/BBQ	250.00	0.00	250.00	250.00	
		Rental - Space	50.00	0.00	50.00	50.00	
		Rental - Equipment	75.00	0.00	75.00		
		Total	\$525.00	\$0.00	\$525.00	400.00	

Request Status Indicators

There are four different types of status for a budget request indicated by a colored dot:

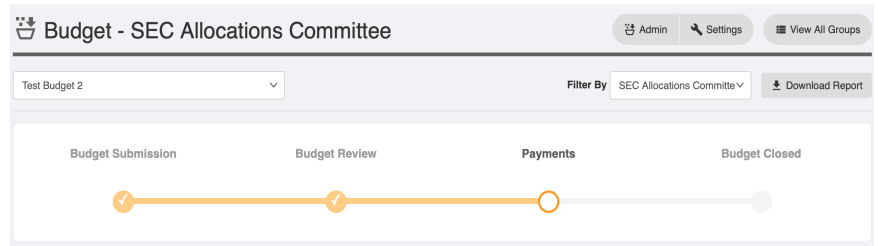
- Orange = Submitted for Review
- Dark Green = Funding Provided
- Light Green = Funding Partially Provided
- Red = Funding Not Provided

If you are unable to differentiate the colors, hovering over one of the dots will show their explanation.

Requested	APPROVAL		
	Approved	Notes	Indicator
150.00	100.00		Light Green
250.00	250.00		Dark Green
50.00	0.00		Red
75.00			Orange

Stage 3: Payments

Once all the budgets have been reviewed and the final decisions are made regarding funding, your budget can be switched to the **Payments** stage, which allows groups to submit payment requests for the approved events.



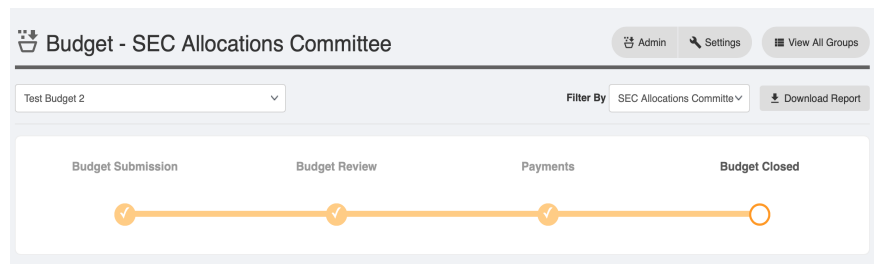
Workflows will automatically be generated for submissions during this stage and added to your board's queue.

Once a group submits a payment request, it will go into your board's workflow procedure. Here you can complete the processes established by your board to complete payment requests.

Once you are finished with your workflow, the status will change for the submitter from pending to completed.

Stage 4: Budget Closed

At the end of each semester once your payment request deadline has passed, the budget period can be closed, preventing further acceptance of payment requests and finalizing the budget period.

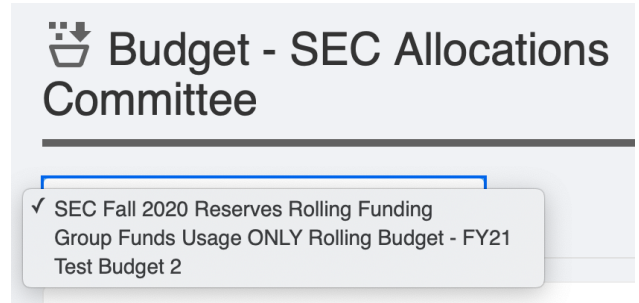


2 - Reserve Rolling Funding

Reserve Rolling Funding budgets work similar to the main Mass Funding budget, but there are only two steps:

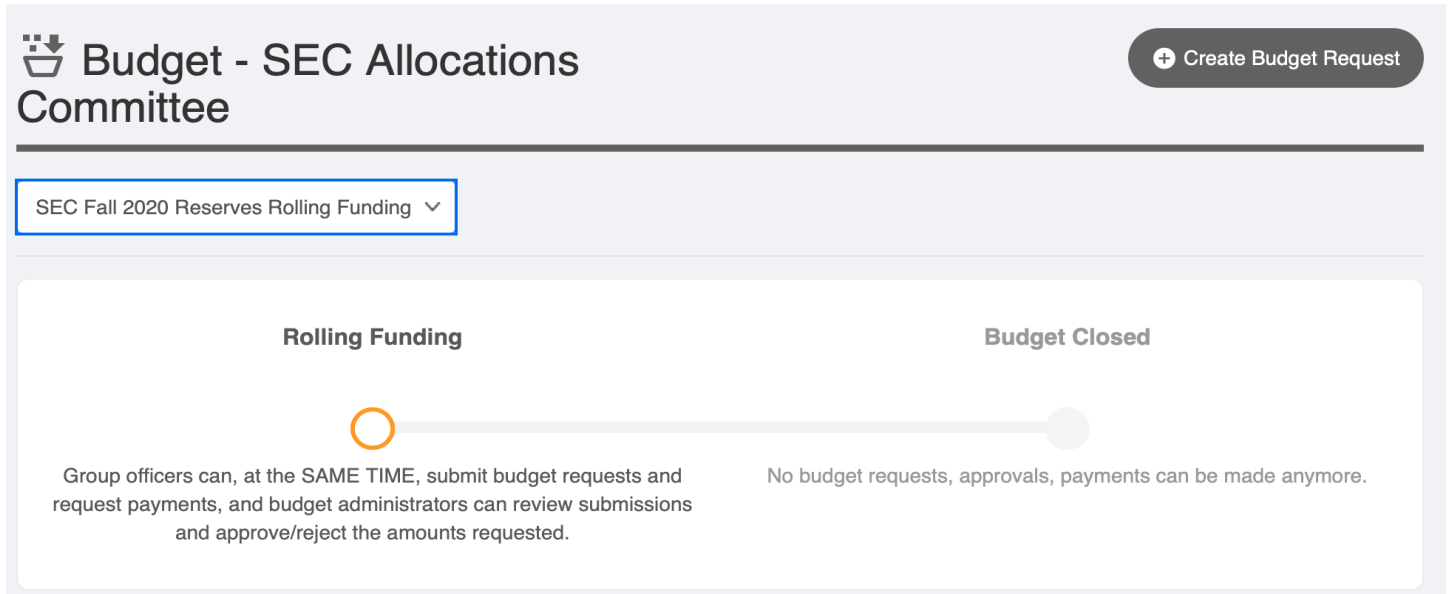
1. Rolling Funding Budget Requests
2. Budget Closed.

Groups can request rolling funding through the **Create Budget Request** button at the top right of the page. These requests can be reviewed on a rolling basis and can be approved throughout the period.



Budget - SEC Allocations Committee

SEC Fall 2020 Reserves Rolling Funding
Group Funds Usage ONLY Rolling Budget - FY21
Test Budget 2



Budget - SEC Allocations Committee

+ Create Budget Request

SEC Fall 2020 Reserves Rolling Funding

Rolling Funding

Group officers can, at the SAME TIME, submit budget requests and request payments, and budget administrators can review submissions and approve/reject the amounts requested.

Budget Closed

No budget requests, approvals, payments can be made anymore.

3 - Club Fund Spending

Accessing Club Funds

Anything regarding money needs to have a budget attached to it, so that the money can be deducted when a payment request is initiated.

Deposits and withdrawals from the club fund can be done through this budget. All withdrawals require a budget so that the system can know where to take the money from when a payment request is entered.

Club funds not attached to any Mass/Rolling Funding request can be requested directly using the **Group Fund Usage ONLY** budget. A budget will need to be made by the group and the parent organization will approve or deny use of funds, similar to the process for rolling funding.

There will be no approval of budgets but payments are approved by the board.

Budget - SEC Allocations Committee

- SEC Fall 2020 Reserves Rolling Funding
- ✓ Group Funds Usage ONLY Rolling Budget - FY21
- Test Budget 2

Budget - Residence Hall Association

+ Create Budget Request

Group Funds Usage ONLY Rolling Budget

Rolling Funding

Group officers can, at the SAME TIME, submit budget requests and request payments, and budget administrators can review submissions and approve/reject the amounts requested.

Budget Closed

No budget requests, approvals, payments can be made anymore.