# South Texas College
## Budget Development Application Instructions
## FY 2020

1.  Log in to Jagnet using your username and password.

2.  Enter the Budget Development Application.
    2.1. Click on "Supervisor" link and then click on the "Financial Management" icon.
    2.2. Click on the "Budget Development" link listed on the Finance tab.
    2.3. Click on the "Create Budget Worksheet" link listed under Finance Budget Development.   The "Create Budget Worksheet" option allows you to revise an organization's the notes for each budget.
    2.4. Click on the "Create Query" button.
    2.5. Check the "Adopted Budget" option and then click "Continue."
    2.6. Enter the parameters for the fiscal year and your organization, then click "Submit" (see image below).
        2.6.1.   Please note that the fund code and organization code are required fields.

3.　　View an organization's budget and add notes for each account budget (operating, travel, and capital)

Notes are **mandatory** in order to comply with SACSCOC requirements.  The notes must itemize the expenses making up the budget amount requested for each account pool and specify the applicable IE strategic goal or objective.

3.1. The following message will display since budget amounts cannot be updated:
"The Organization ****** is locked.  ****** may not update the worksheet at this time."

3.2. Open the "Notes" browser window.

3.2.1.　Click on the account code (in blue colored font) in the "Worksheet" section under the "Account Type/Code" column.

3.2.2.　A browser window will display allowing you to add text to each account pool budget.

3.3. Itemize the expenses making up the budget amount requested.

Notes must be entered in the "Enter Budget Text, Print" field.

Ensure that the itemized expenses total to the entire budget amount requested for that account pool.  Itemizations that are related to an IE goal or objective must be identified.

For example, if the line item is "Memberships/registration fees $20,322" and this budget item is related to your IE Goal 3, then you need to add "G3" beside this item in parenthesis as shown below:

　　Memberships/registration fees $20,322 (G3)

**Operating Accounts**:  The following categories can be used to itemize expenses in the operating/direct expenditures (710000) account pool.

- Operational Supplies
- Educational Supplies
- Subscriptions / Periodicals
- Membership / Registration Fees
- Insurance
- Rentals
- Maintenance & Repair
- Contracted / Purchased Services
- Utilities
- Telephone / Pager
- Postage
- Fees & Other Charges
- Non Capital Furniture / Equipment / Computer / Laptop

**Travel Accounts:**  All travel accounts must have an itemized list of the conference/events staff members will attend and the number of attendees.  Registration fees for the conferences/events must be included in the operating budget and notes.

All travel accounts must be itemized by the name of the conference/event and the number of attendees.  For example:

    Conferences-$10,000 (O1, O2)
        SACS Annual Conference-1 attendee
        American Association of Community Colleges-3 attendees
        Banner Annual Summit-2 attendees
    Local Mileage-$2,000 (O1, O2)

**Capital Accounts:**  Capital budgets will be entered by the Business Office upon recepit of the approved BO-8530 form from the appropriate Vice-President or President, if the Financial Manager reports directly to the President.  After the capital budget has been entered by the Business Office, the Financial Manager must itemize the capital account to identify the items that will be purchased and it's approximate cost.  For example:

    Scanner-$5,000 (O3)
    Laser Color Printer-$5,000 (O3)

3.4. Click the "Save" button near the bottom of the window.

3.5. Repeat this step for other account budgets in the organization.

4.     Return to the main menu and repeat steps 2 and 3 for other organizations as needed.

    4.1. To return to the main menu, click the "Return to Budget Development Menu" link located at the top of the screen.

5.     Troubleshooting:  "No Budget Line exists for this parameter combination."

    5.1. "No Budget Line exists for this parameter combination" will display if the organization you want to view does not have a budget for Fiscal Year 2020.  Please complete and submit the BO-8520 or the BO-8530 request forms mentioned in the Budget Development Guidelines to add the organization to the Budget Development Application.