NOVA AEBG Budgeting & Planning User Manual

AEBG Budgeting & Planning

Overview

NOVA is a platform developed to help institutions manage initiatives funded through categorical funds. Through the migration to NOVA from the AEBG portal, NOVA will be the central platform for AEBG member and consortia information, planning, budgeting and reporting as well as CFAD creation.

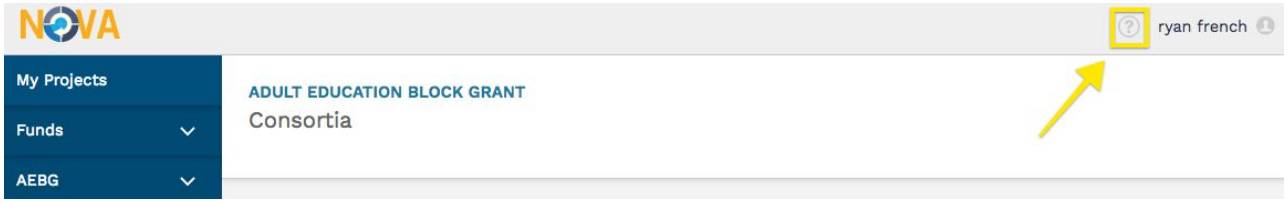
The vision for NOVA has been to enable efficient process and provide transparency and limit bureaucracy. Therefore, NOVA is an open system with wide view access and inputs limited to responsible parties.

The first phase of our release will focus on consortia and member information, planning and budgeting. Continued releases will incorporate new features with the CFAD, annual plan and quarterly fiscal reporting scheduled for after the first of the year.

Access & Permissions

Your account access and permissions are based on information imported from AEBG Portal. The user's relationship with the consortia drives access and permission. For example, consortia contacts will have read/write access to consortia level plans, budgets and member allocations as well as all member plans and budgets. A member contact will have read/write access only to their member level plans and budget. All users will have read only access to all member and consortia plans. A user may have consortia level and member level access based on these relationships.

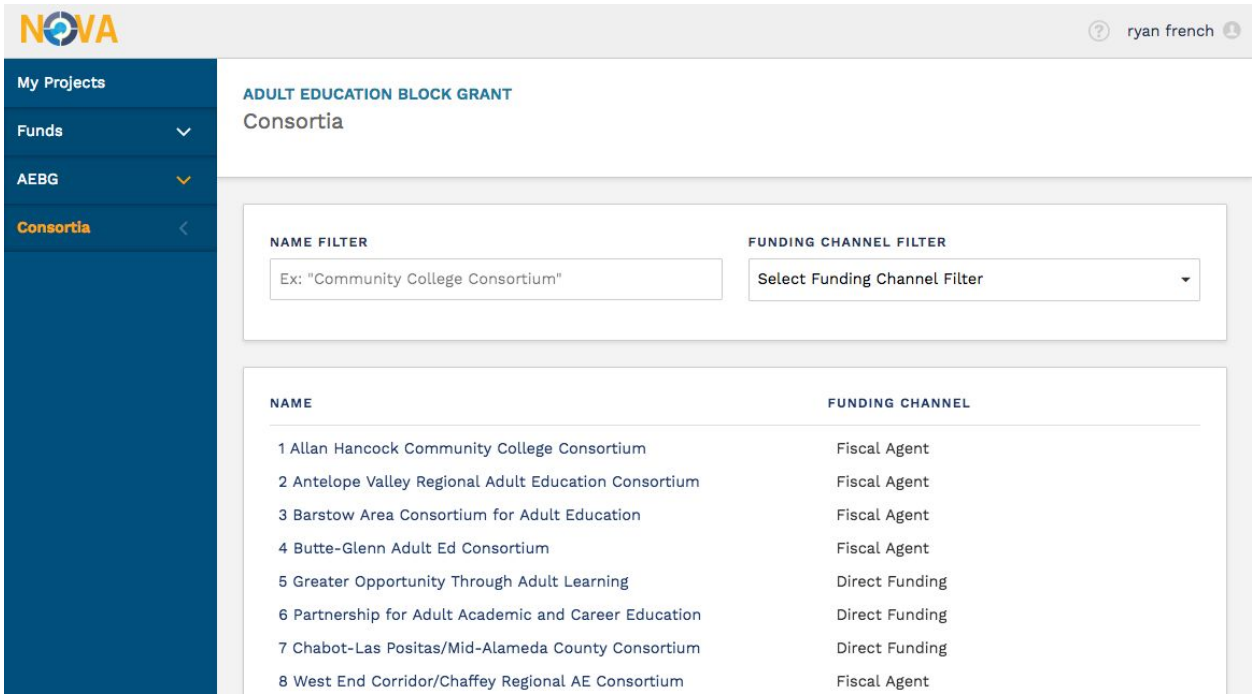
If you feel your level of access is insufficient or incorrect, please use the help feature in the top right corner of NOVA to submit an email and make a request for access.



Provided you have NOVA AEBG access you will see AEBG show up under the Funds section in the left menu panel. To navigate to AEBG, click Funds and then AEBG under the Funds heading.

Main Consortia Dashboard

Once you have navigated to AEBG by clicking Funds > AEBG you will see the list of consortia in the dashboard along with their funding channel.



This list represents all consortia that are in existence for the 2017 - 2018 funding year. You may easily find the consortia you are looking for by using the filters provided. Search for your consortia by name (or assigned number), view all consortia based on their funding channel or use a combination of the two.

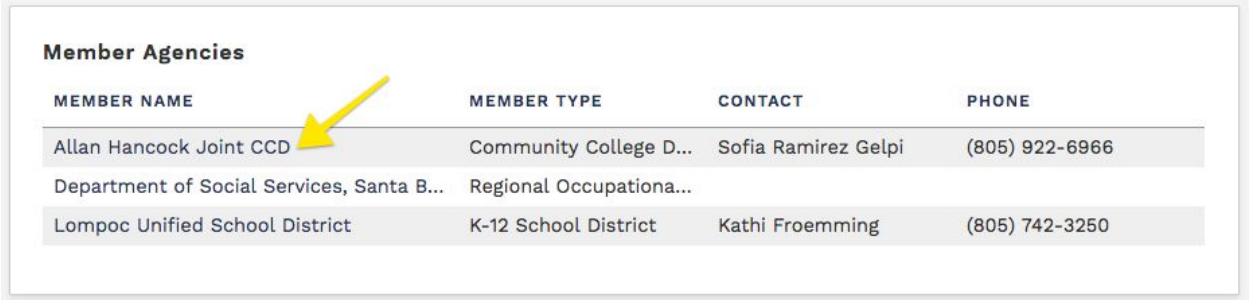
You may click on a consortium to view the consortium's information. For example, clicking Allan Hancock Community College Consortium will reveal consortium level information, member agencies, contacts and documents. In addition, new menu items will be revealed specific to the consortium.

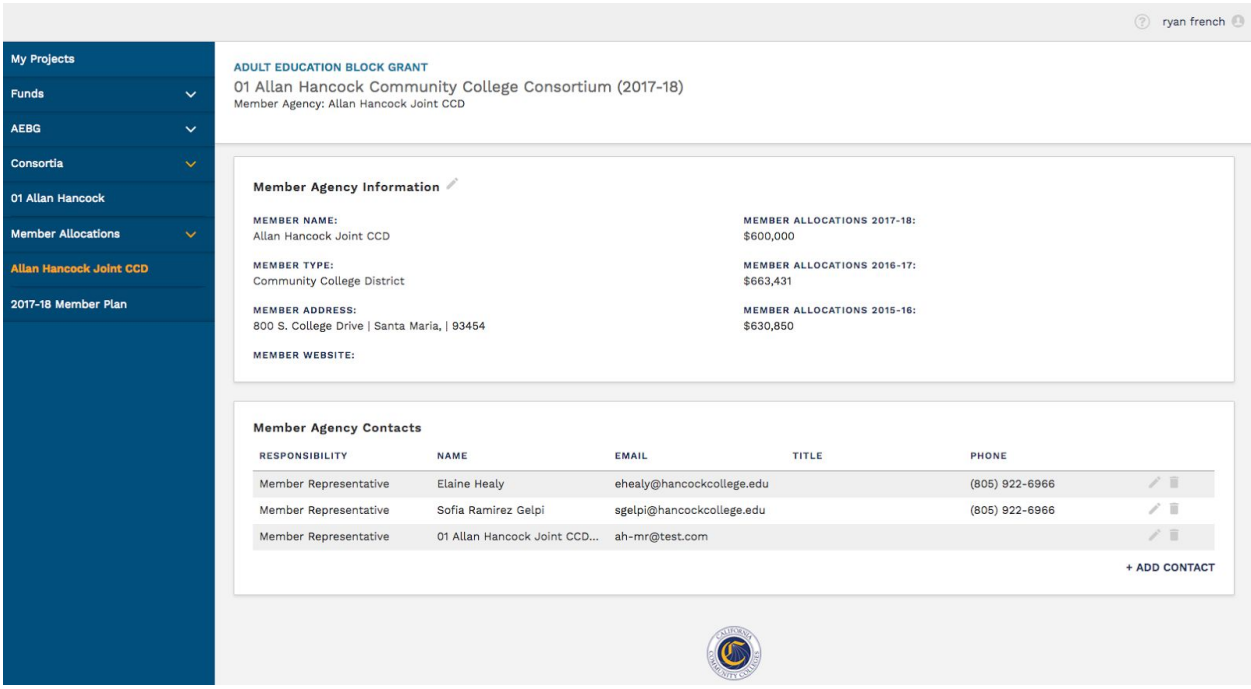
You may view the consortia CFAD, enter the Consortium Plan and Consortium Members and Allocations module.

The main consortium dashboard is intended to be your resource for all consortium and member information.

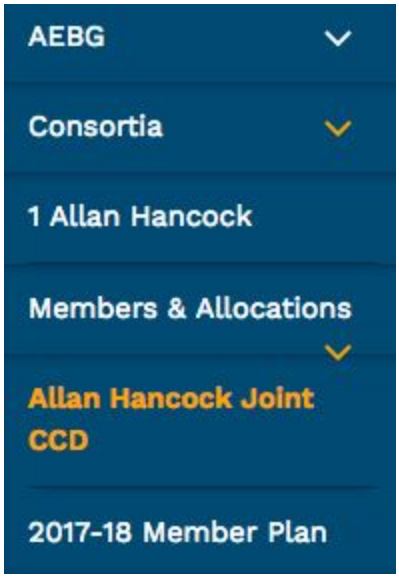
Member Planning & Budget

From the Consortia Dashboard you may also access member agency information by clicking on a consortium. Each member listed as a member is a link. Clicking on the consortium member will reveal member information including their agency information and contacts.

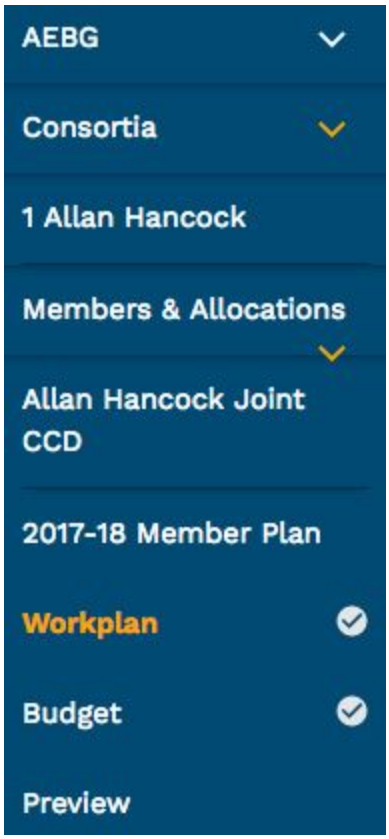




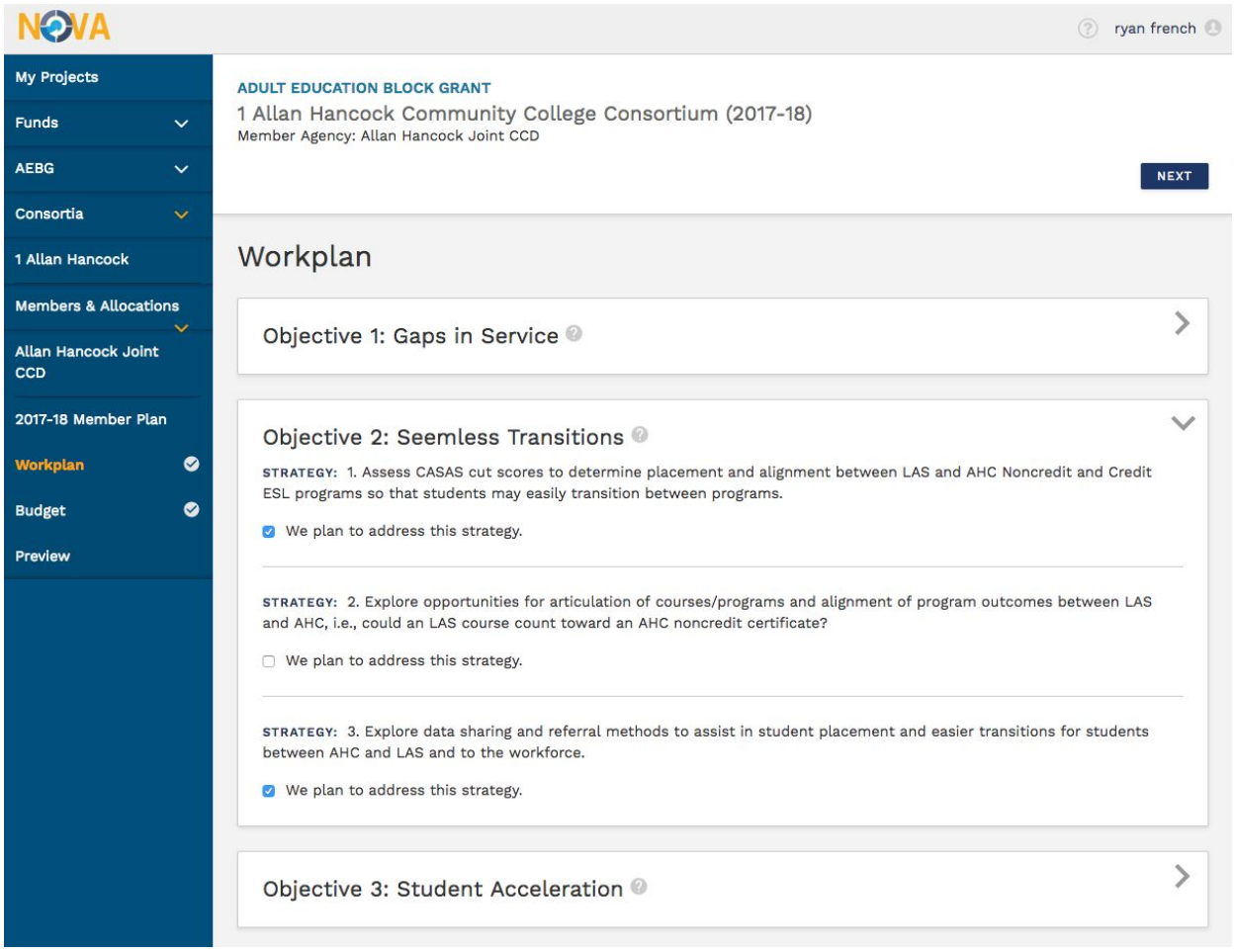
Once you are on the member agency page, a new menu item, 17-18 Member Plan, will be revealed. This is the beginning of the member planning and budgeting process.



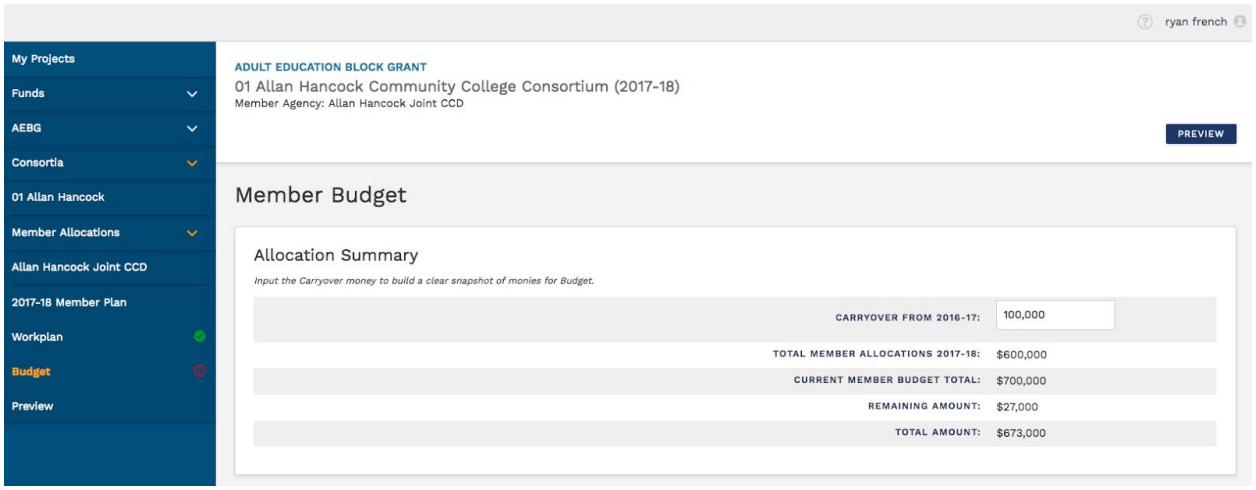
Clicking on the 2017-18 Member Plan menu item will reveal menu items Workplan, Budget and Preview.



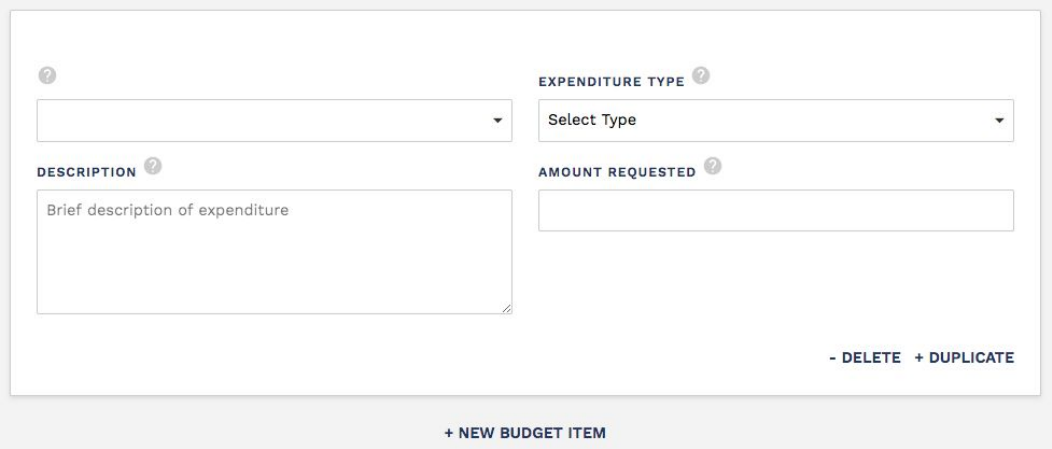
Navigating to the work plan tab is where the member will identify the strategies within the five AEBG objectives they will implement.



Clicking on the budget item will reveal the member budgeting module. First, any carryover funds from the previous funding cycle will be entered in the card provided. These funds will be added to your budget allocation.



Then the member will create budget cards for expenditures that will tie to the strategies they intend to implement.



Once you have completed your budget, click summary to view a complete view of your member plan. If you plan & budget is ready for submittal, you may press submit to advance your plan through the certification process.

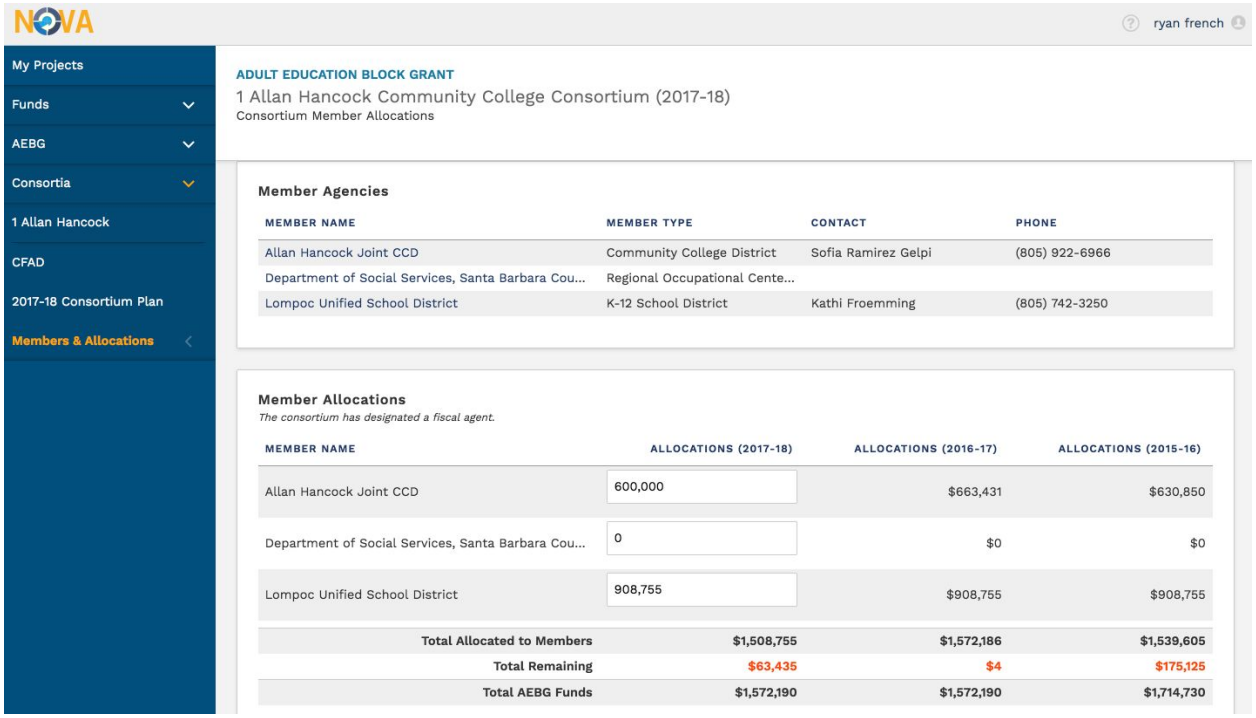
Consortia Certification Process

Once the member has completed their plan and budget the member lead may submit it to the consortium for certification. The consortium lead may certify a plan in submitted status. Once certified the plan becomes read only. In some occasions, a consortium lead may un-certify a plan or plans to where they become editable. This will allow a member to move allocations between object codes. I will also allow the consortium to re-allocate between members.

When accessing a consortium through the dashboard, click the 2017-18 Consortium Plan menu item to reveal the Members and Allocations menu item.

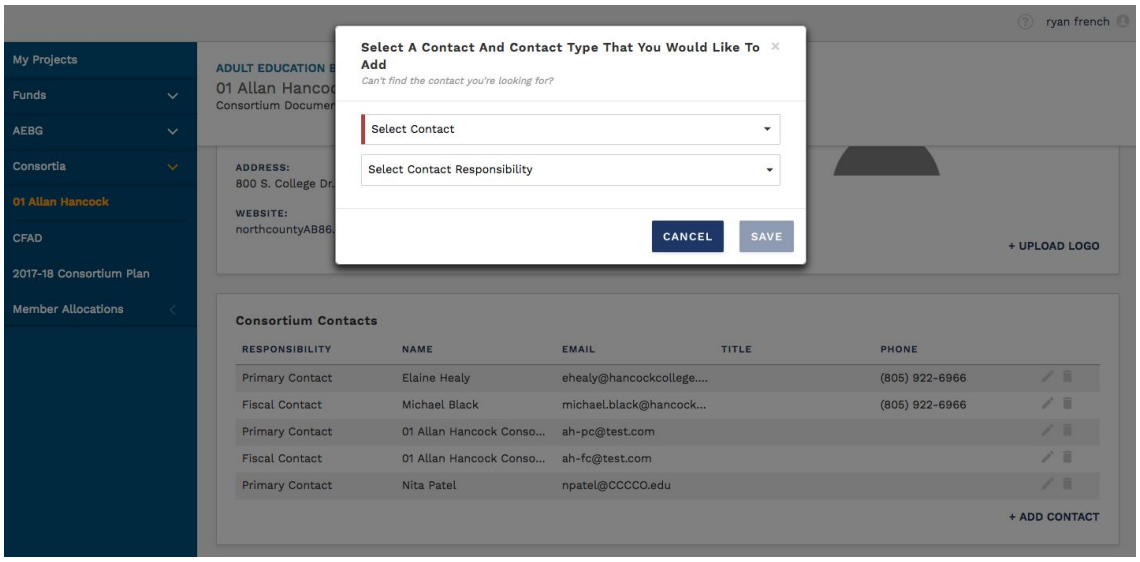
The consortium may reallocate member allocations in some circumstances. To do so, click Members & Allocations in the menu panel. Clicking on this will reveal the a screen listing member agencies and their allocation. In this screen, allocations may be redistributed by adding and subtracting funds within the members. The total budget may not be exceeded.

NOTE: Un-certifying a plan and making changes will require approval from all members and re-contracting.



Adding Consortia or Member Contacts

New contacts may be added to NOVA that will allow the appropriate access at the consortia and/or member level. To do so, when you are in a consortia or member information page click the + ADD CONTACT link in the Consortium or Member Contact card. You will be asked to select the user from a list of existing NOVA users. Then select their level of responsibility and save. If the person is not a current NOVA user you may click the *Can't find the contact you're looking for?* link to invite them to NOVA.



If you have any questions related to NOVA or the AEBG planning & budgeting process please click the question mark icon in the top right of NOVA to submit your question.

Thank you!

FAQs

Q: Why do I not see AEBG in my NOVA menu?

A: If you have access to NOVA but do not see AEBG under the funds in your left menu panel you may not have been assigned consortia or member access. Use the help icon in the top right corner to request access.

Q: Contact information is missing at the consortia and/or member level. Can I update it?

A: Yes, depending on your permissions you may add, edit or delete contact information. The contact must be a NOVA user. If you do not see the person you are trying to add as a contact click the *Can't find the contact you're looking for?* To send an invitation to NOVA.

Q: Member allocations appear incorrect, can I change them?

A: Yes, depending on your permissions you may reallocate between member as long as overall budget is not exceeded. Do this by navigating to AEBG > Consortia > Members & Allocations. This will need to be performed by a consortial lead contact.