

Student Government Budget Planning System (SGBPS)

Account Manager's User Guide

July 2021

SG Budget Planning System (SGBPS)
Account Manager's User Guide

The Account Manager can submit budgets for approval for SmartTags where he or she has been assigned as Account Manager.

Budget Submission
Account Managers must use the following steps to create a budget submission:

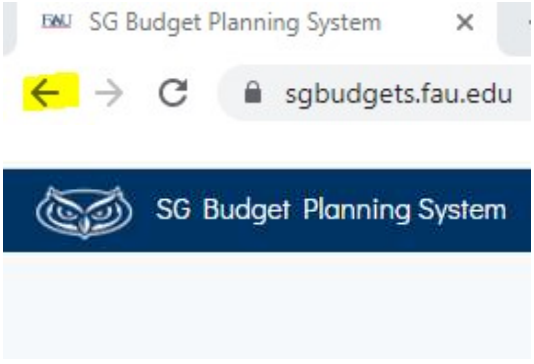
1. Sign into the SGBPS using FAU credentials at the following link https://sgbudgets.fau.edu/



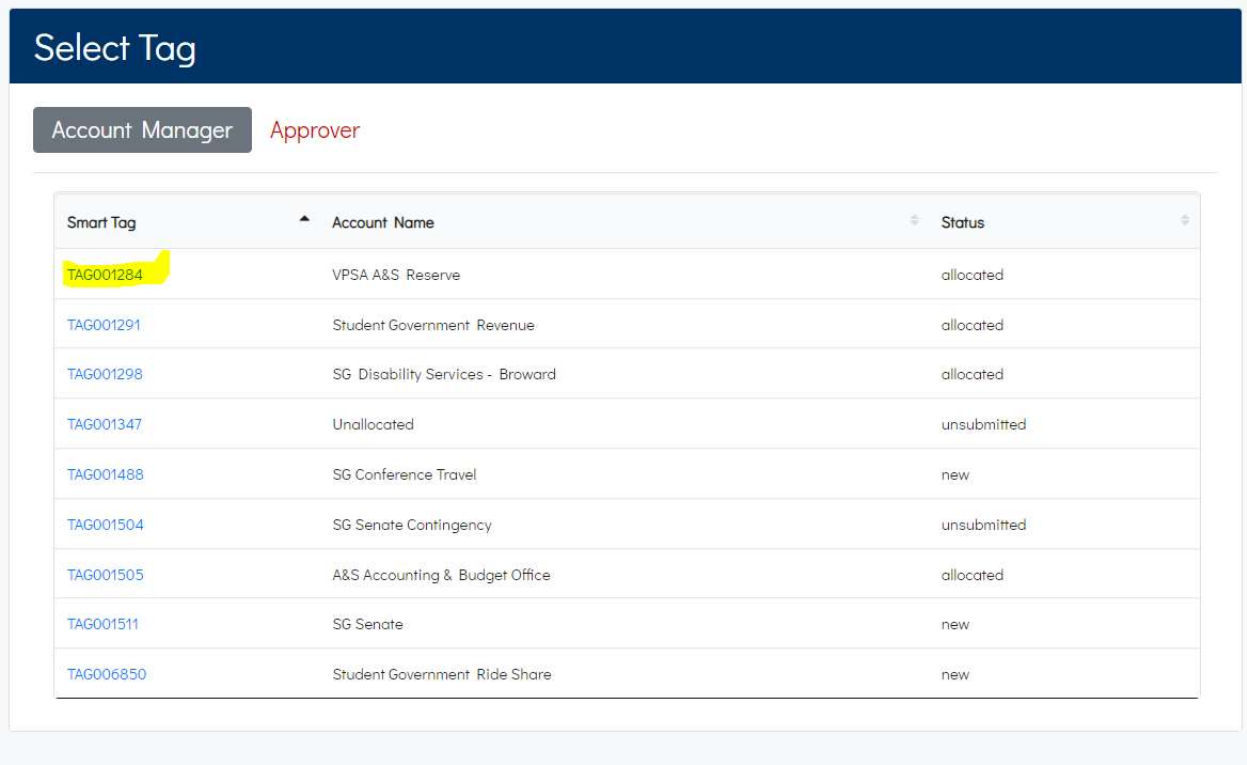
2. Login as: Tag Manager/Approver



Note: *You will have to use the back arrow and the SGBPS logo to navigate back and forth between pages:*



3. Select Account Manager and click on a blue SmartTag link to enter budget information.



4. For Operating SmartTags, click on Salary and Benefits, OPS, Expenses, or Transfers Out to select the type of expenses you would like to enter. In addition, for Revenue and Reserve SmartTags you can click Transfers In and Revenue and for Revenue and Reserve accounts.

Operating



Reserves/Revenue



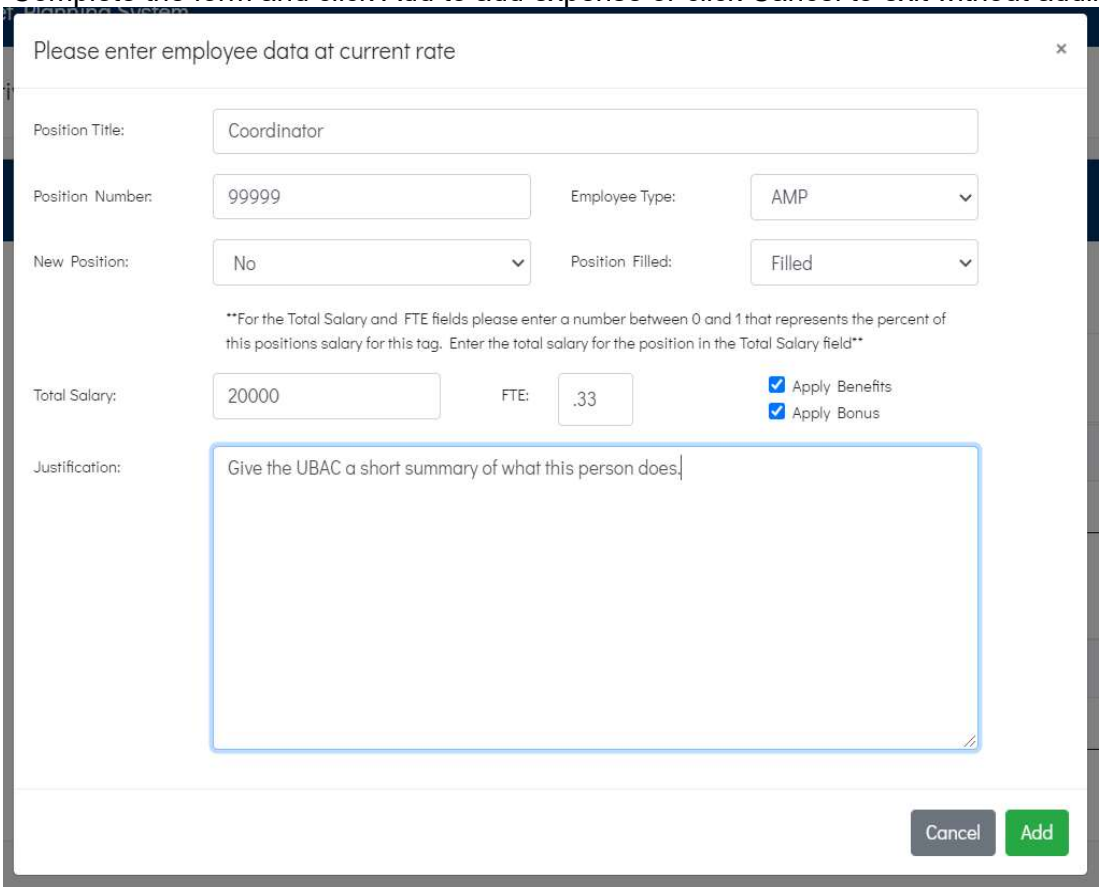
5. Enter Salary and Benefits, OPS, Expenses, Transfers Out, Transfers In, and Revenue Sources. Follow the steps below for each type of submission:

Salary and Benefits *(Only Professional Staff Account Manages complete this)*

1. Click the Add Salary button to add Salaries and Benefits for AMP/SP positions:

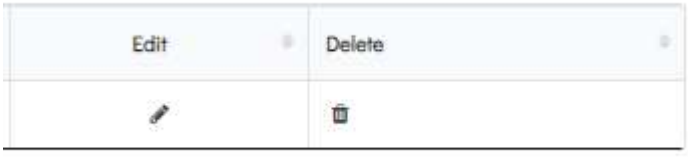


2. Complete the form and click Add to add expense or click Cancel to exit without adding.



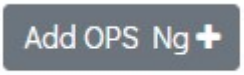
Position Title: Title from Workday, **Position Number:** From Workday, **Employee Type:** Select the appropriate position type as shown in Workday, **New Position:** Select Yes if the position is new and No if it currently exist. **Position Filled:** Select Filled if the position is currently filled and Unfilled if the position is currently not filled. **Total Salary:** Enter portion of the base salary covered by SG. **FTE:** Enter percentage that portion represents as a decimal **Apply Benefits**: Check if SG is paying benefits for this position. **Apply Bonus:** Check if a raise or bonus will apply to the position during the fiscal year. **Justification:** Provide a short summary of the position.

3. After you add expense, you can edit or delete any transaction by clicking on the Edit or Delete icon next to the transaction you want to update:

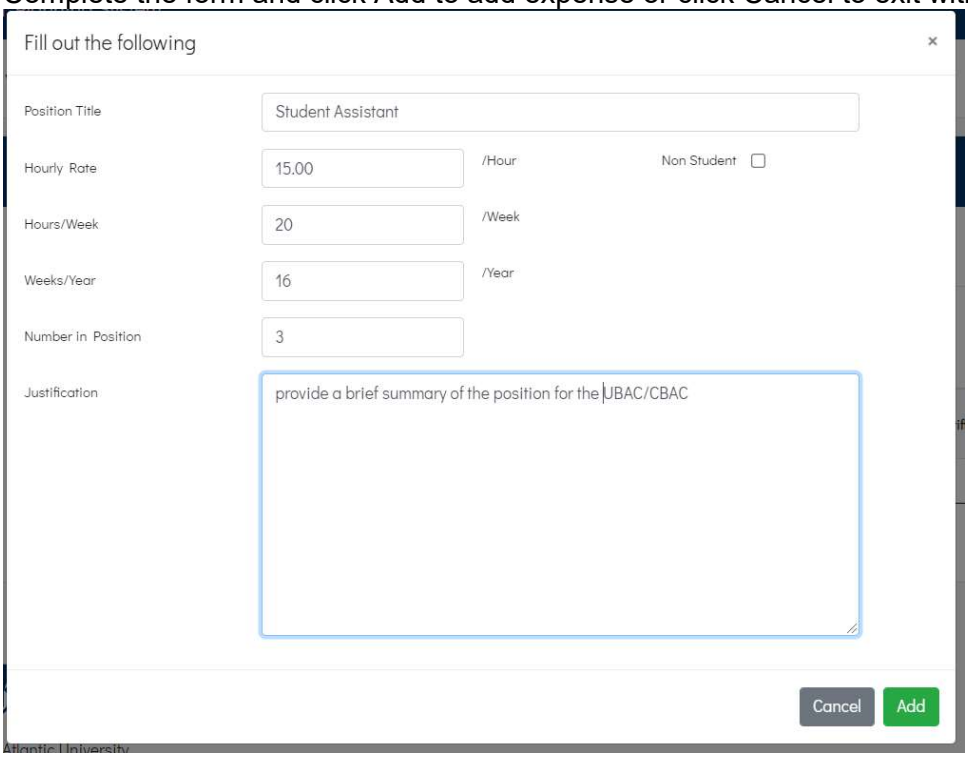


OPS

1. Select the Add OPS button



2. Complete the form and click Add to add expense or click Cancel to exit without adding.



Position Title: Write position title **Hourly Rate:** Put how much this position pays per hour. **Hours/Week:** Put the allowable number of hours a person can work per week, **Weeks/Year**: Put the allowable number of weeks this assignment will be budgeted for. **Number in Position:** Put the number of positions you want with this title, **Non-Student:** check this box if this OPS position is for a person who will not be a student so that benefits can be calculated. **Justification:** Provide a brief summary of the position.

3. After you add expense, you can edit or delete any transaction by clicking on the Edit or Delete icon next to the transaction you want to update:

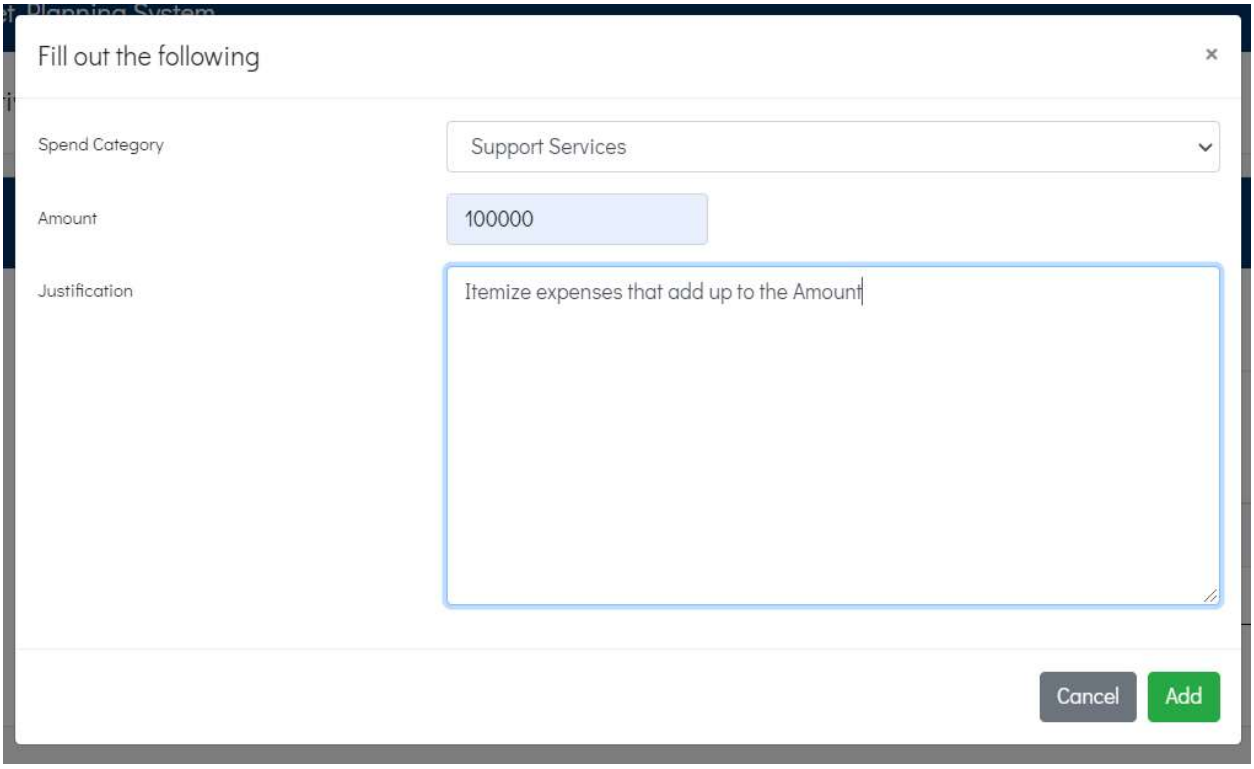


Expenses

1. Click the Add Expense button



2. Complete the form and click Add to add expense or click Cancel to exit without adding.



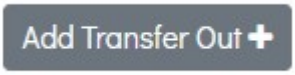
Select Spend Category: Review the Spend Category definitions provide by ASAB to select the correct category *(only select the category once per SmartTag)*. **Amount:** Type the total Budget for this category. **Justification:** Itemize expenses that add up to the total amount.

3. After you add expense, you can edit or delete any transaction by clicking on the Edit or Delete icon next to the transaction you want to update:



Transfer Out

1. Click the Add Transfers Out button



2. Complete the form and click Add to add expense or click Cancel to exit without adding.



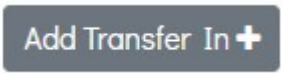
Transfer Out Tag: Put the SmartTag you are transferring to. When you add this budget a Transfer In will be created in the receiving SmartTag, **Amount:** Enter the Amount transferring out. **Justification:** Provide an explanation of the transfer out.

3. After you add expense, you can edit or delete any transaction by clicking on the Edit or Delete icon next to the transaction you want to update:

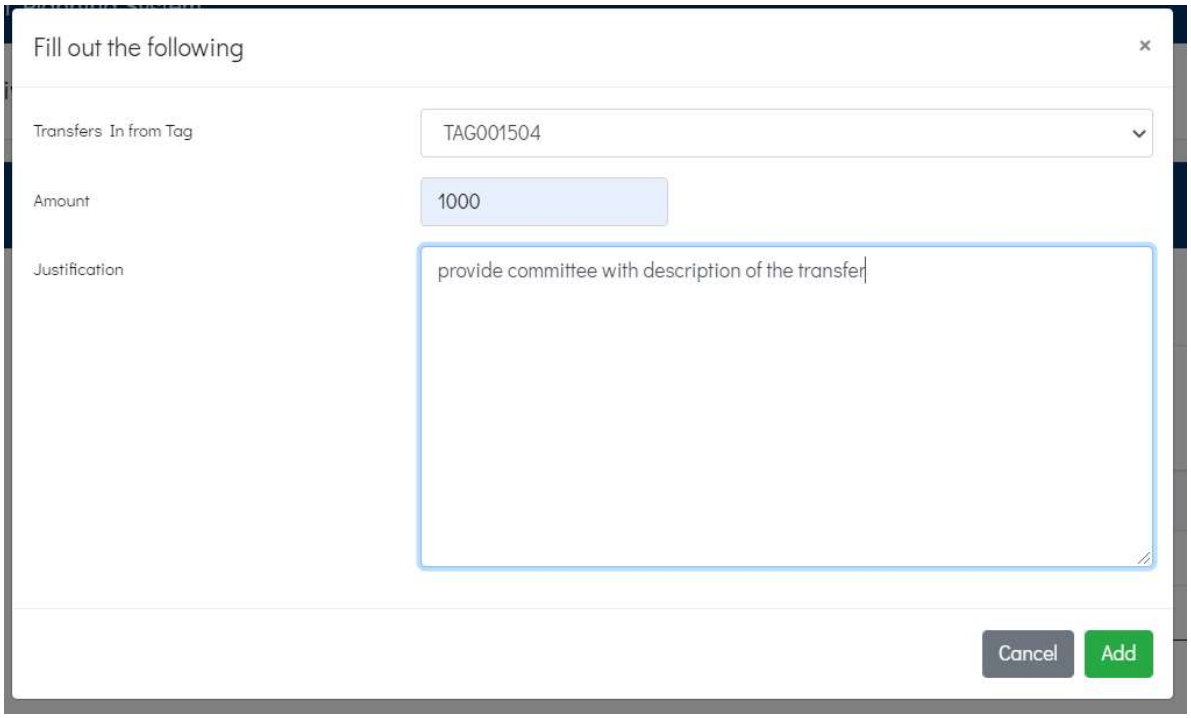


Transfer In

1. Click the Add Transfers In button



2. Complete the form and click Add to add transfer in or click Cancel to exit without adding.



Transfer In From Tag: Put the SmartTag you are transferring from. When you add this budget, a Transfer In will be created in the from SmartTag., **Amount:** Enter the Amount transferring in. **Justification:** Provide an explanation of the transfer in.

3. After you add Transfer In, you can edit or delete any transaction by clicking on the Edit or Delete icon next to the transaction you want to update:

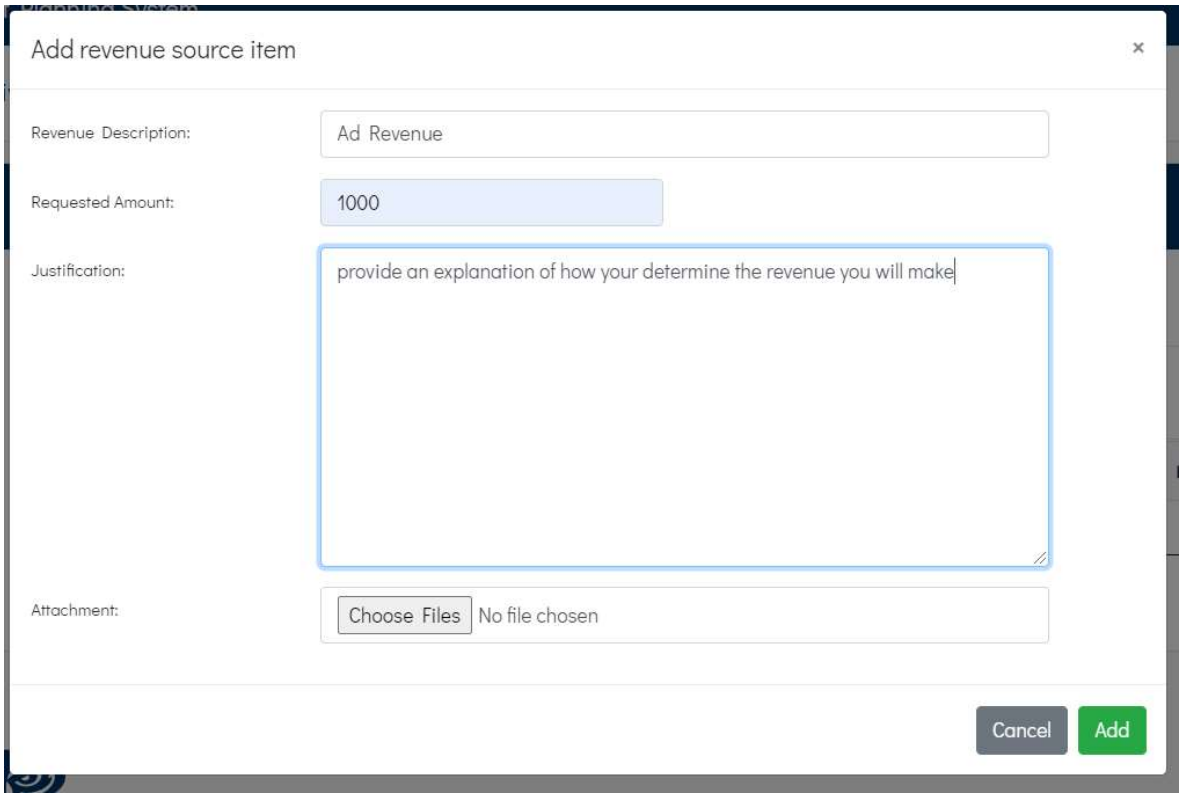


Revenue

1. Click the Add Revenue button



2. Complete the form and click Add to add revenue or click Cancel to exit without adding.



Revenue Description: Put the source of the revenue., **Amount:** Enter the Amount of revenue you plan to raise. **Justification:** Provide an explanation of how you derived at the revenue amount you plan to raise.

3. After you add revenue, you can edit or delete any transaction by clicking on the Edit or Delete icon next to the transaction you want to update:



6. Review your submission before you submit it.

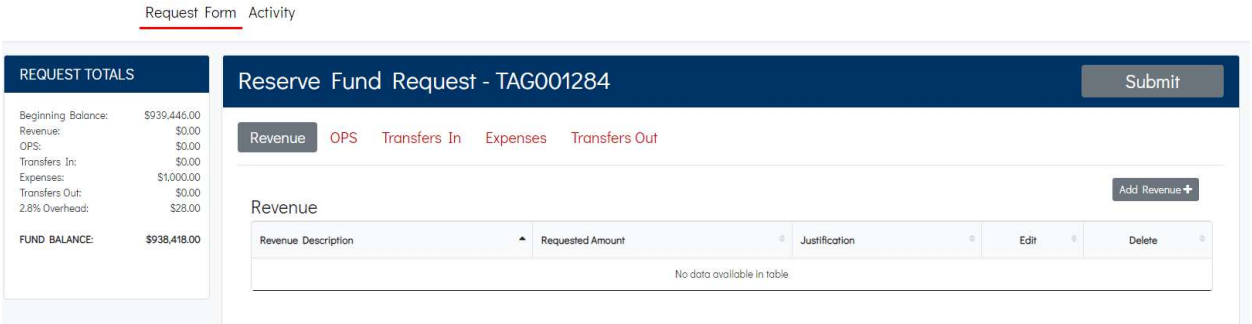
Under Requested Totals, account managers can see total amounts requested including system calculated overhead.

For Revenue and Reserve SmartTags, Account Managers can see their estimated beginning Fund Balance, Revenue, and Transfers In less expenses and their anticipated final ending Fund Balance. The Fund Balance cannot be negative.

Operating SmartTag View



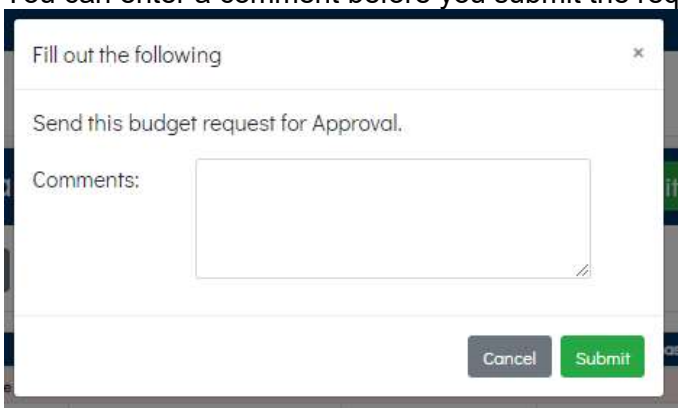
Revenue/Reserve View



7. When you are ready to send your budget submission for approval, click the Submit button in the upper left corner of the submission view:

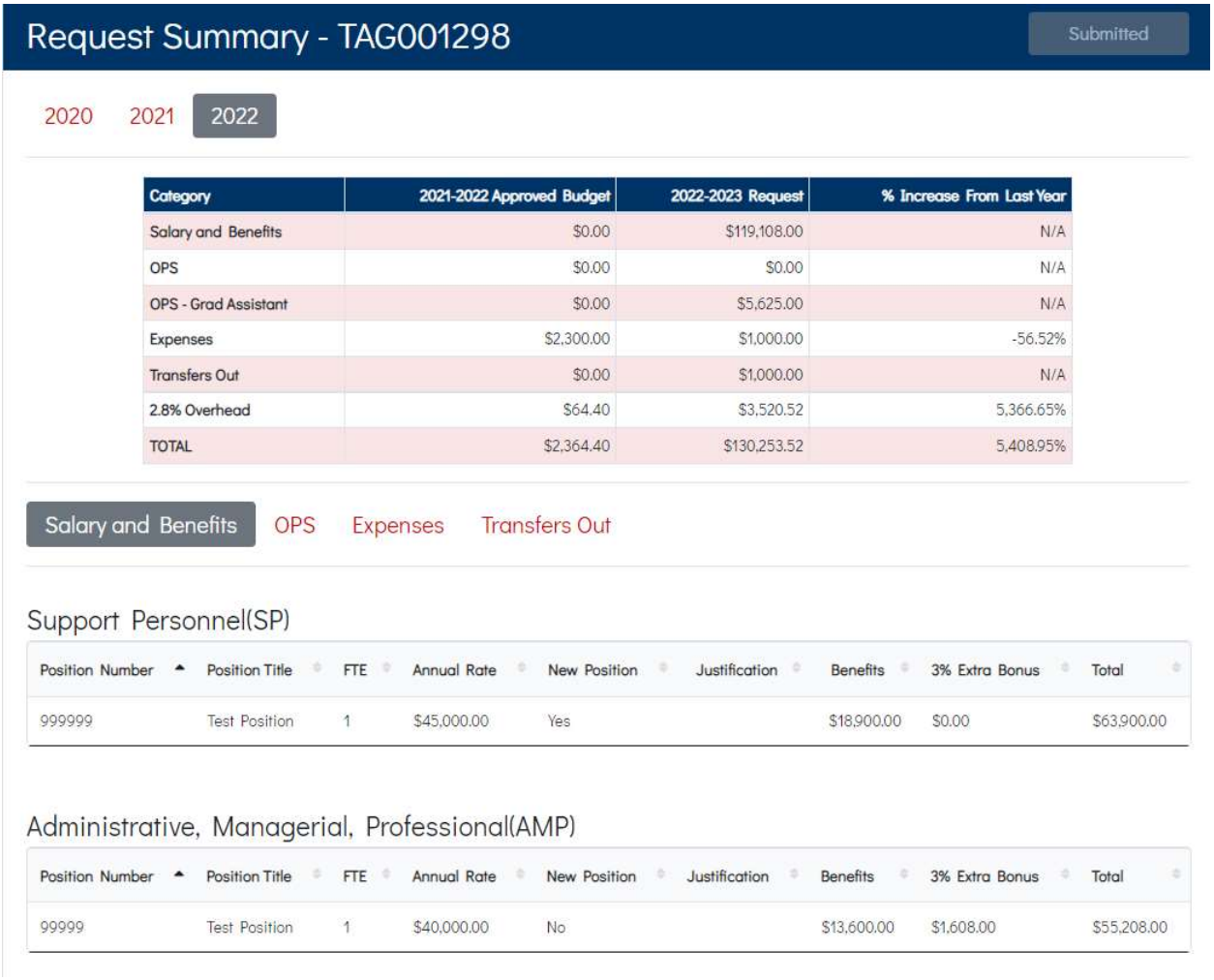


You can enter a comment before you submit the request:



Your submission will be reviewed as follow:
Approver 1 >> Approver 2(some accounts) >> ASAB Review >> UBAC or CBAC Review and Allocation

After Account Mangers submit a request, the submission converts to Request Summary view, which is the same as the Approver's view. Account Managers can see the prior three budgets that were requested for the SmartTag:



Request Summary - TAG001298 Submitted

2020 2021 2022

Category	2021-2022 Approved Budget	2022-2023 Request	% Increase From Last Year
Salary and Benefits	$0.00	$119,108.00	N/A
OPS	$0.00	$0.00	N/A
OPS - Grad Assistant	$0.00	$5,625.00	N/A
Expenses	$2,300.00	$1,000.00	-56.52%
Transfers Out	$0.00	$1,000.00	N/A
2.8% Overhead	$64.40	$3,520.52	5,366.65%
TOTAL	$2,364.40	$130,253.52	5,408.95%

Salary and Benefits OPS Expenses Transfers Out

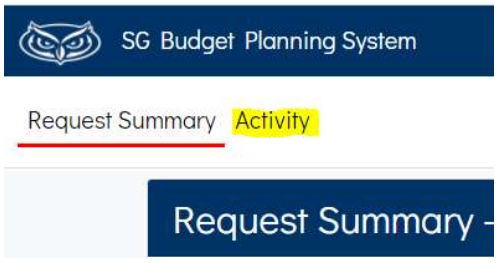
Support Personnel(SP)

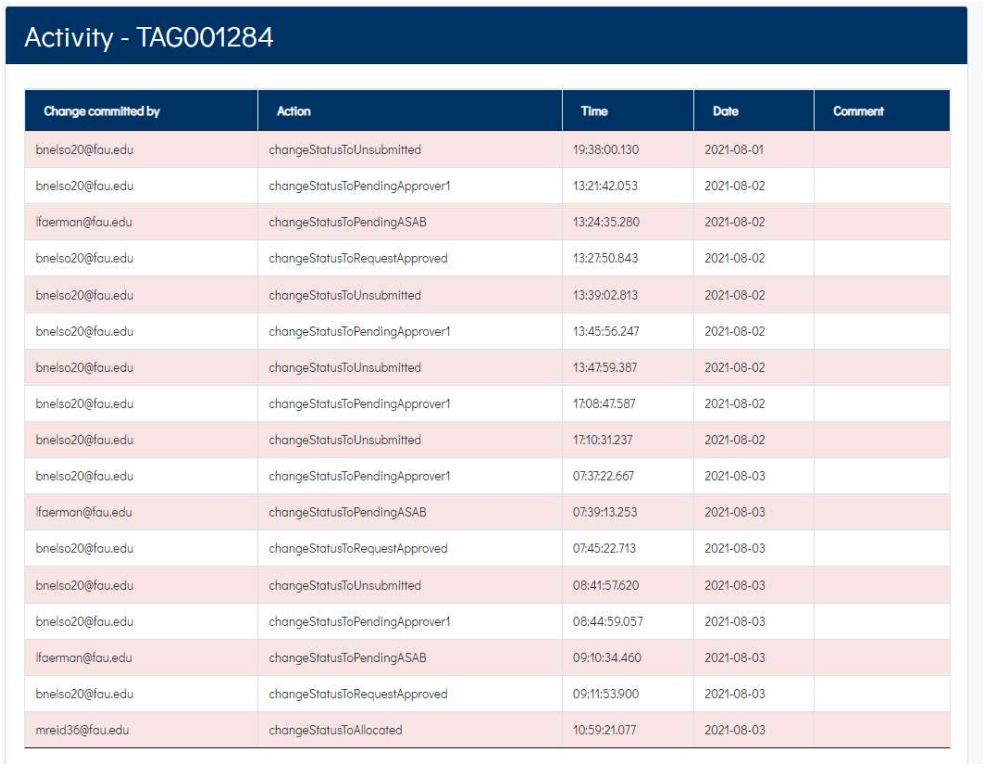
Position Number	Position Title	FTE	Annual Rate	New Position	Justification	Benefits	3% Extra Bonus	Total
999999	Test Position	1	$45,000.00	Yes		$18,900.00	$0.00	$63,900.00

Administrative, Managerial, Professional(AMP)

Position Number	Position Title	FTE	Annual Rate	New Position	Justification	Benefits	3% Extra Bonus	Total
99999	Test Position	1	$40,000.00	No		$13,600.00	$1,608.00	$55,208.00

8. The Status of your budget submission can be tracked by selecting the Activity tab, in the Request Summary





Activity - TAG001284

Change committed by	Action	Time	Date	Comment
bnelso20@fau.edu	changeStatusToUnsubmitted	19:38:00.130	2021-08-01	
bnelso20@fau.edu	changeStatusToPendingApprover1	13:21:42.053	2021-08-02	
lfaerman@fau.edu	changeStatusToPendingASAB	13:24:35.280	2021-08-02	
bnelso20@fau.edu	changeStatusToRequestApproved	13:27:50.843	2021-08-02	
bnelso20@fau.edu	changeStatusToUnsubmitted	13:39:02.813	2021-08-02	
bnelso20@fau.edu	changeStatusToPendingApprover1	13:45:56.247	2021-08-02	
bnelso20@fau.edu	changeStatusToUnsubmitted	13:47:59.387	2021-08-02	
bnelso20@fau.edu	changeStatusToPendingApprover1	17:08:47.587	2021-08-02	
bnelso20@fau.edu	changeStatusToUnsubmitted	17:10:31.237	2021-08-02	
bnelso20@fau.edu	changeStatusToPendingApprover1	07:37:22.667	2021-08-03	
lfaerman@fau.edu	changeStatusToPendingASAB	07:39:13.253	2021-08-03	
bnelso20@fau.edu	changeStatusToRequestApproved	07:45:22.713	2021-08-03	
bnelso20@fau.edu	changeStatusToUnsubmitted	08:41:57.620	2021-08-03	
bnelso20@fau.edu	changeStatusToPendingApprover1	08:44:59.057	2021-08-03	
lfaerman@fau.edu	changeStatusToPendingASAB	09:10:34.460	2021-08-03	
bnelso20@fau.edu	changeStatusToRequestApproved	09:11:53.900	2021-08-03	
mreid36@fau.edu	changeStatusToAllocated	10:59:21.077	2021-08-03	