Student Government Budget Planning System (SGBPS)

Account Manager’s User Guide

July 2021
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/](https://sgbudgets.fau.edu/)

**LOGIN TO SGBUDGETS**

Sign in with your FAUNet ID

FAUNet ID

Password

LOGIN

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.

![Select Tag](image)

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**

- Salary and Benefits
- OPS
- Expenses
- Transfers Out

**Reserves/Revenue**

- Revenue Sources
- OPS
- Transfers In
- Expenses
- Transfers Out
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 Managers complete this)*

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

   ![Add Salary Button]

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

   ![Employee Data Form]

- **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:

![Edit and Delete icons]

**Transfer Out**

1. Click the Add Transfers Out button

![Add Transfer Out button]

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

![Transfer Out form]

**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

Add Revenue

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:

![Edit and Delete icons]

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**

![Operating Fund Request - TAG001298]

**Revenue/Reserve View**

![Revenue/Reserve View - TAG001284]
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:

![Submit button]

You can enter a comment before you submit the request:

![Comment input window]

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

<table>
<thead>
<tr>
<th>Category</th>
<th>2021-2022 Approved Budget</th>
<th>2022-2023 Request</th>
<th>% Increase From Last Year</th>
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</thead>
<tbody>
<tr>
<td>Salary and Benefits</td>
<td>$0.00</td>
<td>$110,000.00</td>
<td>N/A</td>
</tr>
<tr>
<td>OPS</td>
<td>$0.00</td>
<td>$0.00</td>
<td>N/A</td>
</tr>
<tr>
<td>OPS - Grad Assistant</td>
<td>$0.00</td>
<td>$5,625.00</td>
<td>N/A</td>
</tr>
<tr>
<td>Expenses</td>
<td>$2,300.00</td>
<td>$1,000.00</td>
<td>-56.52%</td>
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<tr>
<td>Transfers Out</td>
<td>$0.00</td>
<td>$1,000.00</td>
<td>N/A</td>
</tr>
<tr>
<td>2.8% Overhead</td>
<td>$54.40</td>
<td>$3,520.52</td>
<td>5.305.05%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$2,354.40</td>
<td>$130,253.52</td>
<td>5.408.92%</td>
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</table>

8. The Status of your budget submission can be tracked by selecting the Activity tab, in the Request Summary
<table>
<thead>
<tr>
<th>Change committed by</th>
<th>Action</th>
<th>Time</th>
<th>Date</th>
<th>Comment</th>
</tr>
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<tbody>
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