



Student Government Budget Planning System (SGBPS)

UBAC User's Guide

September 2021

UBAC users can edit and/or allocate budget submissions, allocate campus budgets, and track projection to allocation.

Edit and Allocation Budget Submissions

UBAC users must use the following steps to edit and allocation budget submissions:

1. Sign into the SGBPS using FAU credentials at the following link

<https://sgbudgets.fau.edu/>

LOGIN TO SGBUDGETS

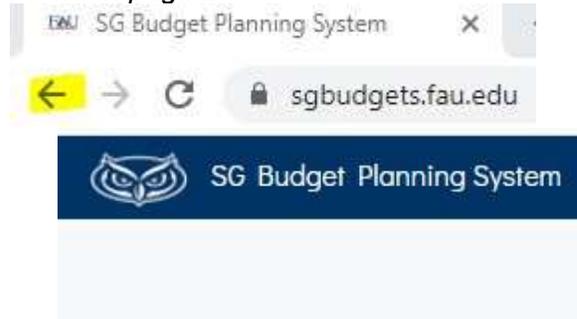
Sign in with your FAUNet ID



2. Login as: UBAC Admin or UBAC Member (Admin can edit Member can only view)



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



- Choose the type of accounts you wish to edit and/or allocate by navigating through the sub-menus as shown below and selecting Operating Fund Tags, Reserve Tags, Revenue Tags, or Campus Allocations.

The screenshot shows the 'SG Budget Planning System' interface. The 'Operating Fund Tags' menu item is highlighted with a red box. The interface includes a sidebar with 'Projection' (\$300,000.00), 'Requests', and 'Allocation' sections. The main area displays a table of budget tags with columns for Tag Number, Account Name, Campus, Sal/Ben, OPS, Expenses, Transfers Out, Overhead, Requested Total, and Allocated Total.

Tag Number	Account Name	Campus	Sal/Ben	OPS	Expenses	Transfers Out	Overhead	Requested Total	Allocated Total
TAG000493	Jupiter Burrow Activity Center	University-Wide	\$147,681.40	\$54,360.00	\$11,550.00	\$1,000.00	\$5,980.56	\$220,571.96	\$220,571.96
TAG001294	Jupiter Campus Recreation	University-Wide	\$69,872.62	\$71,982.00	\$130,550.00	\$0.00	\$7,627.33	\$280,031.95	\$280,031.95
TAG001315	SG Banquet	University-Wide	\$0.00	\$0.00	\$4,500.00	\$0.00	\$126.00	\$4,626.00	\$4,626.00
TAG001501	Student Accessibility Week	University-Wide	\$0.00	\$0.00	\$48,500.00	\$0.00	\$1,358.00	\$49,858.00	\$49,858.00

- Select a specific Tag Number (SmartTag) to edit and/or allocate. (Use the search feature to filter by the SmartTag).

The screenshot shows the 'Reserve Tags' menu item highlighted in a grey box. The interface includes a sidebar with 'Operating Fund Tags', 'Reserve Tags', 'Revenue Tags', and 'Campus Allocations' sections. The main area displays a table of budget tags with columns for Tag Number, Account Name, Campus, Beginning Balance, Revenue Source, Transfers In, OPS, Expenses, Transfers Out, Overhead, Requested Fund Balance, and Allocated Fund Balance.

Tag Number	Account Name	Campus	Beginning Balance	Revenue Source	Transfers In	OPS	Expenses	Transfers Out	Overhead	Requested Fund Balance	Allocated Fund Balance
TAG001230	Jupiter Burrow Student Union	University-Wide	\$64,411.00	\$0.00	\$0.00	\$1,000.00	\$0.00	\$0.00	\$28.00	\$63,383.00	\$0.00

- Select the type of expense or revenue to edit and/or allocate for Revenue, Transfers In, Salary and Benefits, OPS, Expenses, and Transfers Out.

Operating

Salary and Benefits OPS Expenses Transfers Out

Reserves/Revenue

Revenue Sources OPS Transfers In Expenses Transfers Out

- Edit the original submission amounts and then select Allocate or select Allocate without editing. For reference, the *Allocate* view allows UBAC Users to see year-over-year budget comparison.

TAG001230
Allocate

Allocate Activity

Category	21-22 Allocations	22-23 Budget Request	22-23 Allocations	% Increase From Last Year
Beginning Balance	\$69,579.00	---	\$64,411.00	-7.43%
Revenue Source	\$0.00	\$0.00	\$0.00	N/A
Transfers In	\$1,000.00	\$0.00	\$0.00	-100%
OPS	\$0.00	\$0.00	\$0.00	N/A
Expenses	\$10,000.00	\$1,000.00	\$1,000.00	-90%
Transfers Out	\$0.00	\$0.00	\$0.00	N/A
2.8% Overhead	\$280.00	\$28.00	\$28.00	-90%
FUND BALANCE	\$60,299.00	\$63,383.00	\$63,383.00	5.11%

Revenue Sources Transfers In OPS Expenses Transfers Out

	Requested
	Allocated

Expenses

Description	Allocated Budget	Justification
Support Services	\$1,000.00	Test Data
	<input style="width: 80px;" type="text" value="1000.00"/>	

For your reference, the *Activity View* allows UBAC Users to see how the budget requests navigated through the approval process.

TAG001291
Allocate

Allocate
Activity

Change committed by	Action	Time	Date	Comment
bnelso20@fau.edu	changeStatusToUnsubmitted	20:04:00.420	2021-08-01	
bnelso20@fau.edu	changeStatusToPendingApprover1	20:47:10.607	2021-08-01	test submission
dvanpelt@fau.edu	changeStatusToPendingAMRevision	08:52:39.517	2021-08-02	Testing Send Back
bnelso20@fau.edu	changeStatusToPendingApprover1	08:53:28.837	2021-08-02	Test send back and resubmit
dvanpelt@fau.edu	changeStatusToPendingASAB	10:01:43.030	2021-08-02	Testing approver 1
bnelso20@fau.edu	changeStatusToUnsubmitted	11:19:46.817	2021-08-02	
bnelso20@fau.edu	changeStatusToPendingApprover1	11:20:52.420	2021-08-02	submitting
bnelso20@fau.edu	changeStatusToUnsubmitted	11:21:19.230	2021-08-02	

Allocate Campus Budgets

To Allocate Campus Budgets, UBAC Users must use the following steps:

1. In the Budgets View, click on Campus Allocations

Budgets

Operating Fund Tags
Reserve Tags
Revenue Tags
Campus Allocations

Search:

Campus	Last year's Allocation Amount	Allocation Amount	
Boca	\$0.00	\$100,000.00	✎
Broward	\$0.00	\$200,000.00	✎
Northern	\$0.00	\$500,000.00	✎

2. Click on the Pencil icon next to a campus:

Operating Fund Tags Reserve Tags Revenue Tags **Campus Allocations**

Search:

Campus	Last year's Allocation Amount	Allocation Amount	
Boca	\$0.00	\$100,000.00	
Broward	\$0.00	\$200,000.00	
Northern	\$0.00	\$500,000.00	

3. Enter an allocation amount for that campus and click OK.

Edit Campus Allocation Amount ✕

Campus

Amount

Track Projection to Allocations

To track Projection to Allocation, UBAC Users must do the following:

After a submission is allocated, from the Budgets view, in the left pane under Allocation, the - Over/Under amount will show the difference between the Projection and the Allocation:

The screenshot displays the SG Budget Planning System interface. The top navigation bar includes the system logo, the text "SG Budget Planning System", and a "Logout" link. The main content area is divided into a left sidebar and a main panel.

Projection: Shows a total of \$9,853,298.00.

Requests: Lists requests for UWIDE (\$0.00), Boca (\$0.00), Broward (\$10,280.00), and Northern (\$0.00), with a total of \$10,280.00. The -Over/Under amount is \$9,843,018.00.

Allocation: Lists allocations for UWIDE (\$0.00), Boca (\$100,000.00), Broward (\$200,000.00), and Northern (\$500,000.00), with a total of \$800,000.00. The -Over/Under amount is 9,053,298.00.

Budgets: The "Campus Allocations" tab is active, showing a table with columns for Campus, Last year's Allocation Amount, and Allocation Amount. A search box is located above the table.

Campus	Last year's Allocation Amount	Allocation Amount	
Boca	\$0.00	\$100,000.00	
Broward	\$0.00	\$200,000.00	
Northern	\$0.00	\$500,000.00	