

Bulls Budget System

IYF Training Guide



**UNIVERSITY OF
SOUTH FLORIDA**

Resource Management and Analysis

Overview of system

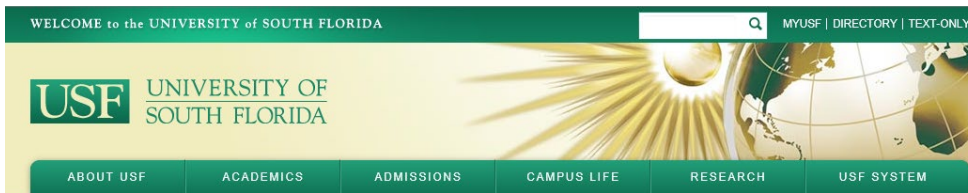
- Components
 - Budget Planning (SCD)
 - Labor Planning – Line positions and Other labor (OPS & other salary)
 - Budget Planning (non-labor budget plus summary for labor information fed from Labor Planning)
 - In-year Forecasting (IYF)
 - IYF Labor Planning (seeded with Labor Planning)
 - IYF Budget Planning (seeded with Budget Planning)
 - Reporting – use reports under the following menu trails
 - Main menu ribbon – Reports / USF (see list of reports)
 - Axiom Assistant – Libraries / Reports Library / USF (see list of reports)

Requirements to use software

- USF has only accessed the system using PC's
- Axiom works best in Microsoft Edge
- Request Access through your VP/Dean
- Provide email address and Net ID

Accessing Software

- 1) Copy this web address into the browser search box – <https://usf.axiom.cloud/>
- 2) Axiom uses the USF Portal to authenticate your access. Sign In by entering your USF Net ID and password. (This might not be required if you have already logged into another USF web server)



Welcome to USF

You can use your USF NetID to access a variety of password-protected information and resources.

- **What is a USF NetID**
Find out more
- **Don't have a USF NetID?**
Create an account now
- **Forgot your password?**
Reset your password
- **Need help?**
Contact us

USF NetID Single-SignOn

By logging in, I agree to the terms of the [Acceptable Use Policy](#).



3) The Axiom home page will come up automatically after you sign in. Click on the waffle icon.

Welcome to this year's planning process.

Budget	2022 Budget	2021 Actual	2023 Proposed	Variance	Variance %	Step	Status
FINANCIAL STATEMENT CONTROL UNIV	\$0	\$(69,866)	\$0	\$69,866	100.0%	■ ■ ■ ■ ■	Not Started
PAYROLL CONTROL ACCOUNTS UNIVER	\$0	\$646,590	\$0	\$(646,590)	100.0%	■ ■ ■ ■ ■	Not Started
VENDING CONTROL ACCOUNT UNIVER	\$767,000	\$535,650	\$617,000	\$81,350	13.2%	■ ■ ■ ■ ■	Not Started
BPA CONTROL ACCOUNT UNIVERSITY	\$0	\$80,093	\$100,000	\$19,907	19.9%	■ ■ ■ ■ ■	Not Started
ACTIVITY & SERVICE FEES SARASOTA	\$1,794,783	\$1,479,695	\$3,854,910	\$2,375,215	61.6%	■ ■ ■ ■ ■	Not Started
ACTIVITY & SERVICE FEES ST PETER	\$2,868,800	\$2,933,376	\$2,859,170	\$(74,206)	(2.6%)	■ ■ ■ ■ ■	Not Started
ACTIVITY & SERVICE FEES TAMPA	\$400,000	\$471,448	\$475,000	\$3,552	0.7%	■ ■ ■ ■ ■	Not Started
STUDENT FEES HEALTH	\$14,000	\$13,631	\$8,000	\$(5,631)	(70.4%)	■ ■ ■ ■ ■	Not Started

2022 Year to Date

Actual Expenses	\$(26,302)
Budget Amount	\$0
Variance	\$(26,302)
Variance %	0.0%

Monthly Variances

1 Budget Owner Input
2 Budget Review
3 Approval
4 Budget Office

4) This will open up a smaller window below the waffle icon for you to select the Windows Client.

PRODUCT AREAS

- Budgeting
- Intelligence Center
- System Administration

LAUNCH

- Windows Client
- Excel Client
- MS Word Add-In
- MS PowerPoint Add-In

5) A window will open requesting approval to open the file. Click the Open button.

Open this file?

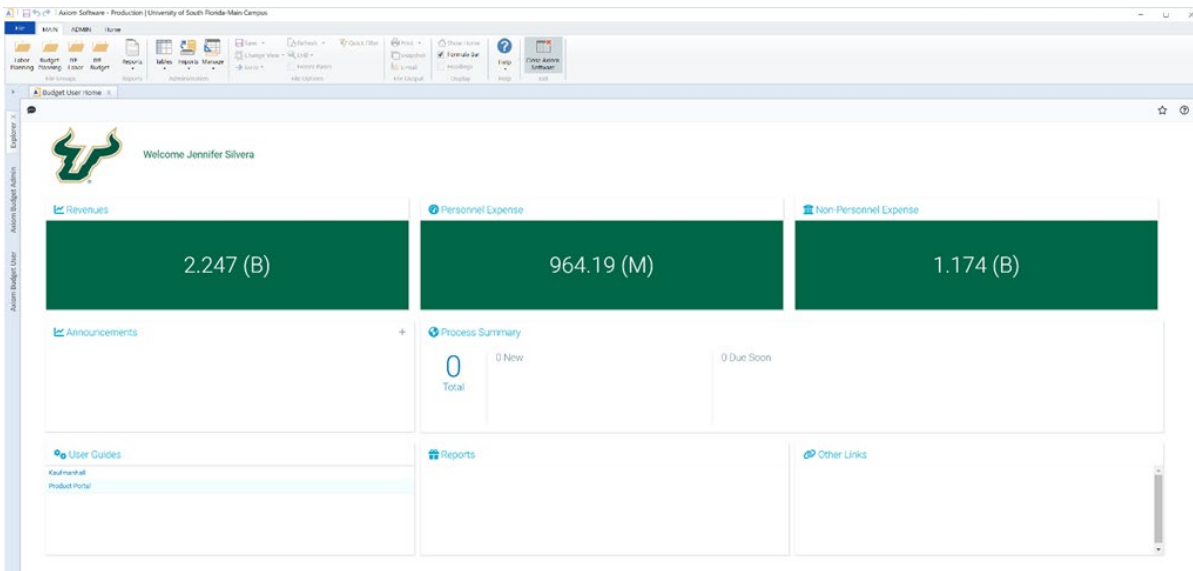
Do you want to open Axiom.UI.Start.application from usf.axiom.cloud?

[Report file as unsafe](#)

Open

Cancel

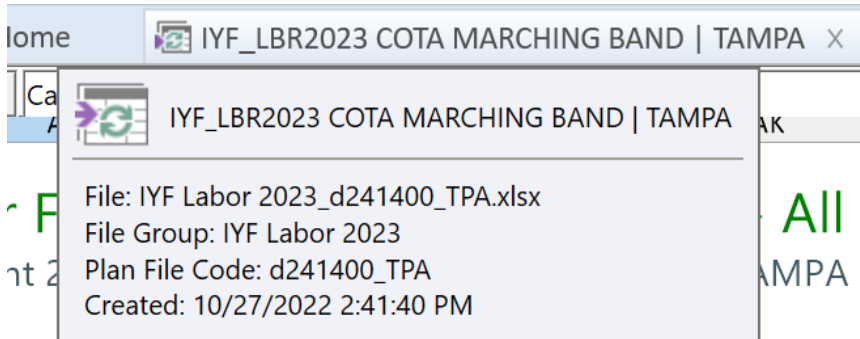
6) The USF home page will open.



In-Year Forecasting (IYF)

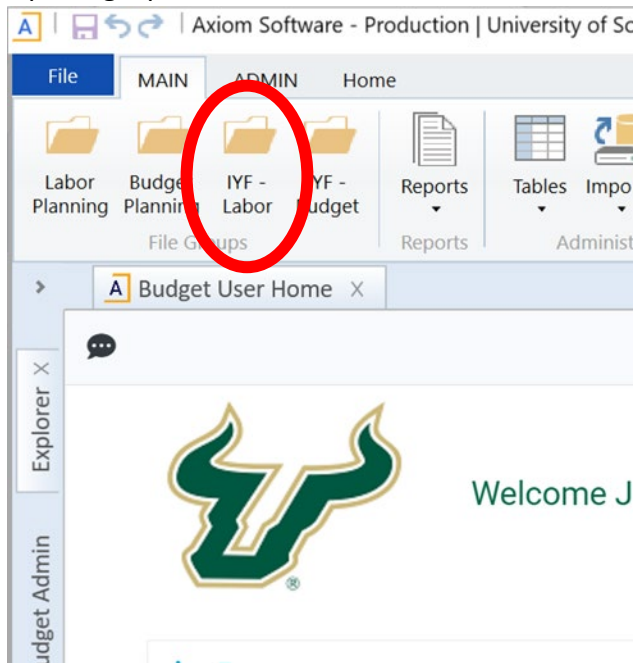
This process uses the same breakout (Labor Planning & Budget Planning). The initial IYF plans are seeded with the monthly breakdowns of the Labor & Budget plans for each department.

- a. IYF Labor Plan files only have 4 tabs (LaborSummary | Roster | Positions | OtherLabor)
- b. Positions will reflect the GEMS position information as of the date the plan file was created (put the mouse pointer over the tab at the top and the date created will be displayed)



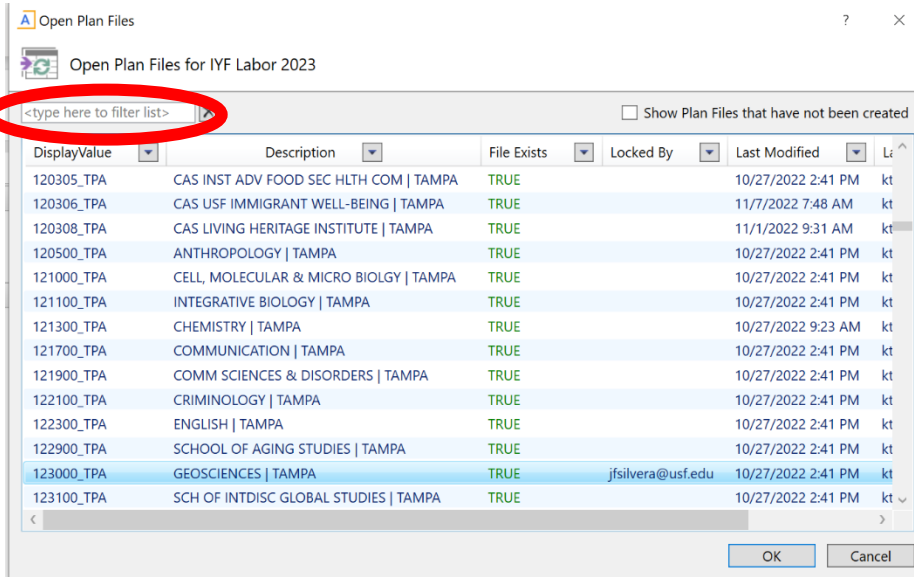
- c. Any months that are closed will replace the monthly spreads from the plan and replace them with actual amounts from FAST / GEMS. If there are any amounts a zero will replace the spread amount.
- d. The total forecast for the position will be in column labeled Q4 Forecast (Qx represents quarter the estimate is being input and it is for the full fiscal year).
- e. E&G Recurring will not be displayed, it is for current year funding only.

- Opening a plan file



- 1) Click on the IYF - Labor button (upper left portion of the home page)
- 2) A search box will appear.

- A department number can be selected by scrolling through the list or by typing the number in the “<type here to filter list> box.



- Click “OK” or double click the department you would like to open.
- The system will run through some queries to populate the plan file you selected. This may take a few seconds.
- The page below will display when the plan file is fully loaded.

Category	2023 Base Budget	2023 Q3 Forecast Salary for Distribution	2023 Q3 Forecast Plan File Distribution	2023 Q3 Forecast Plan File Benefits	\$ Var	% Var	FTE's	New Positions
Other Labor Expense*	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	0.0%	0	0
Pooled Position Expense*	\$ 49,000	\$ 56,677	\$ 56,677	\$ 56,677	\$ 7,677	13.5%	0	0
Total Labor Expenses	\$ 49,000	\$ 56,677	\$ 56,677	\$ 56,677	\$ 7,677	13.5%	0.0	0.0

Category	2023 Base Budget	2023 Q3 Forecast Salary for Distribution	2023 Q3 Forecast Plan File Distribution	2023 Q3 Forecast Plan File Benefits	\$ Var	% Var
Other Labor Expense*	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	0.0%
Pooled Position Expense*	\$ 49,000	\$ 56,677	\$ 56,677	\$ 56,677	\$ 7,677	13.5%
Total Labor Expenses	\$ 49,000	\$ 56,677	\$ 56,677	\$ 56,677	\$ 7,677	13.5%

- The file will have 4 tabs listed at the bottom of the worksheet. Other Labor tab is used to budget out the departments line positions and OPS.
 - LaborSummary – report that summarizes the information that is brought in from GEMS or entered in by a user.

11) Each position is represented by a Green box

NEW 2244	Professor	Faculty
Add New Employee		

12) Here is a list of each component of a position

- a. Position information – **Category** - Faculty | **Position number** 00002959 | **Position Title** - Professor | **Position type** - Faculty

Position #	Position Title	Type
00002959	Professor	Faculty

b. Incumbent information –

- i. End Date is editable to budget for Incumbents that will be leaving the position. The system will calculate the amount of salary that can be budgeted.
- ii. Spread Method - allows budget to be allocated to the 12 periods based on appointment types - 12 Months | 9 Months | Fall | Spring | Summer A, B, or C

Incumbent(s)	Start Date	End Date	FTE	Work Period	Pay Type	Spread Method
0	1/0/1900		0.00	-	Salary	12 Months

c. Salary Information – most fields are editable to allow for salary adjustments not reflected in GEMS. This includes the functionality to designate the effective date.

- i. Base Rate – Base salary brought in from GEMS
- ii. Base Adjustments (**note:** percent is applied first and then salary adjustments are added)
 1. Merit Adjustment – Percentage increase to base salary that is either designated Centrally or input by department
 2. Salary Adjustments – Dollar amount(s) added to base rate
- iii. New Annual Base rate total
- iv. Non-base salary designations
 1. Stipends(s) – included in E&G Recurring distribution amount
 2. Bonuses and Non-Base Adjustments – included in Proposed budget but not E&G recurring distributions.
 3. Total Annualized Salary – the total of the base salary plus all of the adjustments.
 4. Budgeted Salary \$ for Distribution – the amount of salary dollars that will be budgeted.

Base Rate:	\$95,879	Effective Date
Merit Adjustment:	0.0%	
Salary \$ Adjustment 1:	\$0	
Salary \$ Adjustment 2:	\$0	
NEW Annual Base Rate:	\$95,879	
Stipend(s):	\$0	
Bonuses and Non-Base Adjustments:	\$0	
2020 Total Annualized Salary:	\$95,879	
Budgeted Salary \$ for Distribution:	95,879	

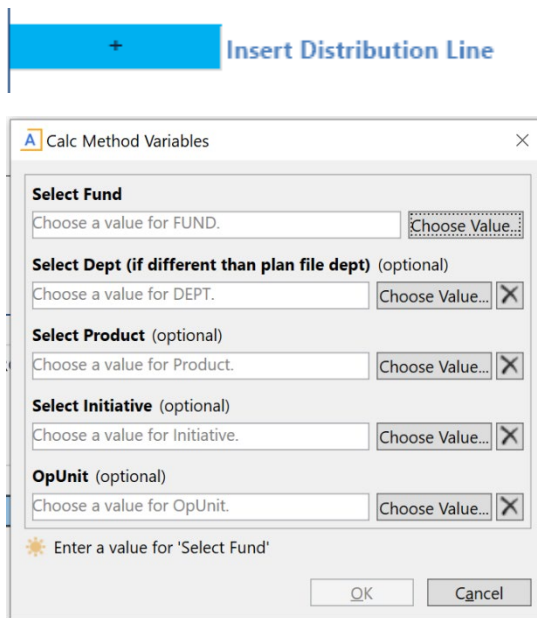
- d. Pay distribution – populated based on previous year actuals
 - i. Chartfields – Fund | Dept | Product | Initiative | Op Unit

Fund	Dept	Product	Initiative	OpUnit
10000 - GENERAL REVENUE	260000 - HONORS COLLEGE	0 - DEFAULT PRODUCT	0 - DEFAULT INITIATIVE	TPA

- ii. Q3 Forecast – The total forecast for the position will be in column labeled Q4 Forecast (Qx represents quarter the estimate is being input and it is for the full fiscal year).
- iii. Months – monthly anticipated expenditures of each distribution row. Monthly spreads are reflected as amounts and need to be changed individually. Any months that are closed will replace the monthly spreads from the plan and replace them with actual amounts from FAST / GEMS. If there any amounts a zero will replace the spread amount.
- iv. Distribution Override – percentage entered to adjust the rate/salary. If nothing is entered, then the percentage on the next line will be used for the budget distribution.
- v. Distribution % - populated from previous year distribution. Will be updated to the amount entered in Distribution Override (if entered).
- vi. Distribution \$ - calculated field based on Distribution %.
- vii. Benefit % - calculated on previous year actuals or designated amount if line is vacant.

	2023								
	Q3 Forecast	July	August	September	October	November	December	January	
Distribution Override									
Distribution %	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
Distribution \$	65,000	0	3,000	10,000	6,667	6,667	6,667	6,667	6,667
Benefits %	38.77%	0	511	4,178	2,790	2,790	1,963	2,585	

- viii. Insert Distribution Line – double click the + box to add an additional distribution.



1. Calc Method Variable box - Chartfield selection Box
 - a. Select Fund – required. Type “d” then the fund code for direct input or you can click on the “Choose Value” button to select from a list.
 - b. Select Department – indicated as optional. If nothing is selected, then the default is the plan file department.
 - c. Select Product – optional – default is “000000 DEFAULT PRODUCT”

- b. Positions Tab – Employees – a drop down of all of the employees on positions will display alphabetically. Once a name is selected the cursor will move to the employee row of employee selected.
- c. Positions Tab – Positions – a drop down of the position number and title will display in ascending order. Once a position is selected the cursor will move to the position row of the number selected.

14) OtherLabor Tab – data Entry – review 7d for the description

LABOR IN-YEAR FORECAST - Other Labor

Department 240700_TPA - COTA PRODUCTION | TAMPA

Fund - Fund Description	Product - Product Description	December Actuals	January Actuals	February Forecast	March Forecast	April Forecast	May Forecast	June Forecast	FY 2023 Q3 Forecast
Other Labor Expenses									
01810 - VPA FAE Production Aux	000000 - DEFAULT PRODUCT	0	0	0	0	0	0	0	558
10000 - GENERAL REVENUE	000000 - DEFAULT PRODUCT	0	0	0	0	0	0	0	0
+		Insert New Chart String							
Total Other Labor Expenses		0	0	0	0	0	0	0	558
Pooled Position Expenses									
01810 - VPA FAE Production Aux	000000 - DEFAULT PRODUCT	17,954	7,108	5,747	8,621	5,747	5,747	7,471	111,507
28000 - RESTR FEDERAL WORK STUDY	000000 - DEFAULT PRODUCT	0	0	0	0	0	0	0	0
01810 - VPA FAE Production Aux	000000 - DEFAULT PRODUCT	0	0	0	0	0	0	0	0
+		Insert New Chart String							
Total Pooled Position Expenses		17,954	7,108	5,747	8,621	5,747	5,747	7,471	111,507

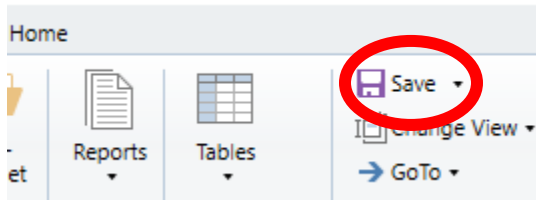
- a. Other Labor Expenses
 - i. Sorted by Fund | Product | Initiative | Budget Account
 - ii. Amounts will populate based on the amounts entered in Budget Planning.
 - iii. Adjustment – enter projected expenditures in the light blue cells
 - iv. Spread Method – used to spread the budget into the months. **See 12b for options.**
- b. Pooled Positions Expenses – used for budgeting OPS budgets.

LABOR IN-YEAR FORECAST - Other Labor Expenses

Department 240700_TPA - COTA PRODUCTION | TAMPA

Fund - Fund Description	Product - Product Description	Initiative - Initiative Description	Budget Account	Detail	FY2022 YTD Actuals	FY2023 YTD Actuals	FY2023 Budget	FY2023 Revised Budget	July Actuals
Pooled Position Expenses									
01810 - VPA FAE Production Aux	000000 - DEFAULT PRODUCT	0000000 - DEFAULT INITIATIVE	88032 - OPS - OTHER		37,963	78,174	0	74,442	3,726
			88032 - OPS - OTHER					0.0%	0
28000 - RESTR FEDERAL WORK STUDY	000000 - DEFAULT PRODUCT	0000000 - DEFAULT INITIATIVE	88032 - OPS - OTHER		0	0	0	100	0
			88032 - OPS - OTHER					0.0%	0
01810 - VPA FAE Production Aux	000000 - DEFAULT PRODUCT	0000000 - DEFAULT INITIATIVE	88033 - OPS - ADJUNCTS		0	0	0	0	0
			88033 - OPS - ADJUNCTS					0.0%	0
+		Insert New Chart String							
Total Pooled Position Expenses					37,963	78,174	0	74,542	3,726

- 15) Save – saves the entered information to the system tables. **Note: do not hit “Refresh” before saving. All entered data will be lost.**



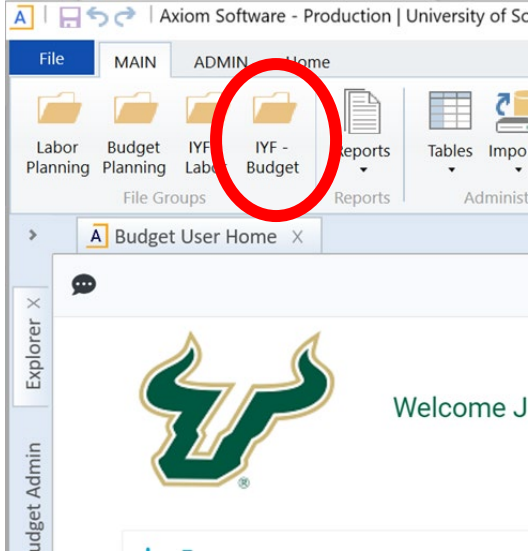
- a. Any tab can be saved to an Excel file. Click the dropdown arrow and select “Save As (Local File)”

- 16) LaborSummary & Roster tabs will show aggregated budget amounts. There are also USF reports that are being developed to aid the budget process.

Budget Planning

The planning files for Budget Planning are used to budget for non-labor budget accounts and pulls in labor budget information from IYF Labor Planning to provide a complete listing of the budgets associated with a FAST department number. Further details can be found in subsequent pages.

- Opening a plan file



- 1) Click on the IYF - Budget button (upper left portion of the home page)
- 2) Follow the steps 2-5 from IYF Labor Planning to open a plan file
- 3) The page below will display when the plan file is fully loaded.

University Of South Florida In-Year Forecast

FY23 Forecast: TPA - 123000 GEOSCIENCES | TAMPA
Year-to-Date through Feb

Acct	Description	FY 2022 YTD Actuals	FY 2023 YTD Actuals	FY 2023 Budget	FY 2023 Budget (revised)	July Actuals	August Actuals	September Actuals	October Actuals	November Actuals	December Actuals	January Actuals	February Forecast	March Forecast
FUND: 01001 - CAS Human Resources Inst Aux PRODUCT: 000000 - DEFAULT PRODUCT														
INITIATIVE: 0000000 - DEFAULT INITIATIVE														
NON-PERSONNEL EXPENSE														
88100	TRAVEL	0	0	1	1	0	0	0	0	0	0	0	0	0
88200	TELEPHONE & TELECOMMUNICATIONS	0	0	0	0	0	0	0	0	0	0	0	0	0
88250	CONTRACTUAL SERVICES	0	0	0	0	0	0	0	0	0	0	0	0	0
88400	COMPUTER RELATED - MATERIAL S	0	0	0	0	0	0	0	0	0	0	0	0	0
88420	MATERIALS, SUPPLIES & EQUIPMEN	0	0	0	0	0	0	0	0	0	0	0	0	0
88510	REPAIRS/MAINTENANCE/RENOVATION	0	0	1	1	0	0	0	0	0	0	0	0	0
88801	ADMIN OVERHEAD	0	0	1	1	0	0	0	0	0	0	0	0	0
Insert Non Personnel Expense														
Total Non-Personnel Expense		0	0	3	3	0	0	0	0	0	0	0	0	0
Insert Non Personnel Expense														
Net Expense		0	0	3	3	0	0	0	0	0	0	0	0	0
Net DEFAULT PRODUCT		0	0	(3)	(3)	0	0	0	0	0	0	0	0	0
FUND: 01001 - CAS Human Resources Inst Aux PRODUCT: CAS1WI - CAS Water Institute														
INITIATIVE: 0000000 - DEFAULT INITIATIVE														
REVENUE														
86000	INTERDEPARTMENT AUX REVENUE	2,409	2,546	1	1	0	0	2,546	0	0	0	0	0	0
Insert Non Personnel Expense														
Total Revenue		2,409	2,546	1	1	0	0	2,546	0	0	0	0	0	0
Net Revenues		2,409	2,546	1	1	0	0	2,546	0	0	0	0	0	0
NON-PERSONNEL EXPENSE														
88400	COMPUTER RELATED - MATERIAL S	0	3,455	1	1	0	0	3,501	(46)	0	0	0	0	0
Forecast Summary														

4) The Budget Plan file has two tabs



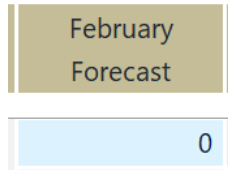
- a. Summary – this a report that summarizes the amounts budgeted for the department.
 - i. Budget Category - Revenue | Personnel Expense | Non-Personnel Expense
 - ii. By Budget account title
 - iii. By Fund Type – E&G Recurring | Auxiliary | C&G | DSO | E&G | Financial Aid
- b. Forecast – used to budget Revenues and Non-Personnel Expenses. It does display Personnel Expenses but as read only. Any changes needed for Personnel Expenses need to be completed in the IYF Labor Plan file.
 - i. The Chartfields are split into green boxes of Fund | Product



- ii. Initiatives are included inside the green box – Sorted by the Budget Categories identified in 4a.i. (above).
- iii. The blue “+” boxes are used to add any additional items needed.



- iv. The budgets will be seeded by the amounts entered in Budget Planning.
 - 1. These amounts can be adjusted by Dollar amount in the light blue box.

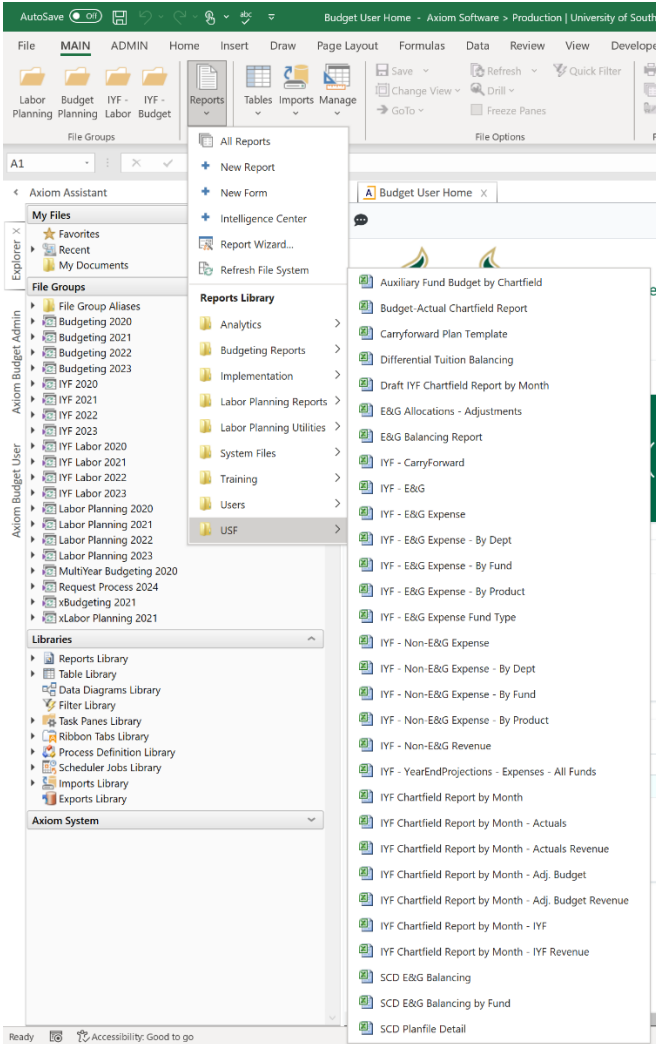


- v. Months - monthly anticipated expenditures of each distribution row. Monthly spreads are reflected as amounts and need to be changed individually. Any months that are closed will replace the monthly spreads from the plan and replace them with actual amounts from FAST / GEMS. If there any amounts a zero will replace the spread amount.
 - vi. If there is a Fund | Product that isn’t populated in the plan file. Send a note to RMA with the chartfield and budget account and it will be added.
- c. **Key differences between IYF Budget and Budget Planning**
- i. E&G Recurring will not be displayed, it is for current year funding only.
 - ii. Monthly spreads are reflected as amounts and need to be changed individually.
 - iii. Revised Budgets will be pulled in from FAST to show the current budget in FAST (including any adjustments completed year to date).

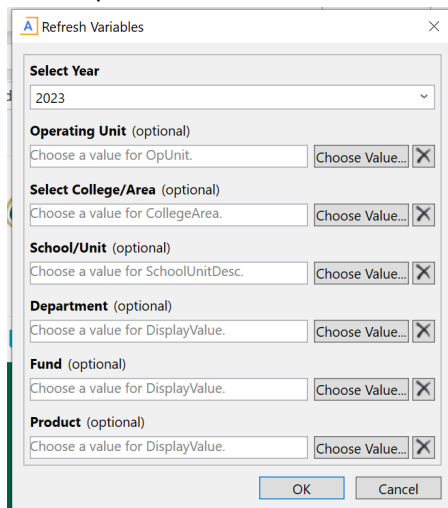
Reporting

The reporting functionality in the system is one of the reasons the university implemented the Bulls Budget System. An example of the enhanced reporting is the additional groupings of departments by school and college.

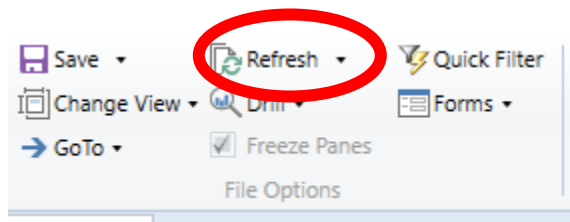
1. USF developed reports – select the Reports button on the main menu ribbon | select the USF folder | the list of reports will appear | click on the desired report



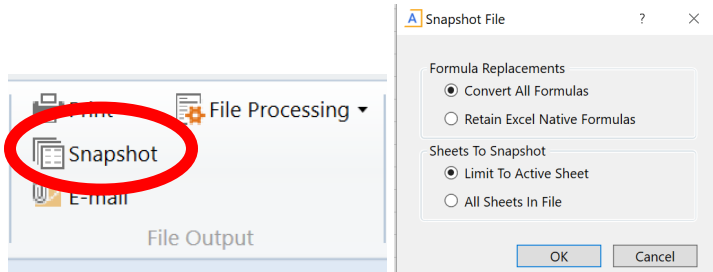
- a. Each report will have its own selection criteria.



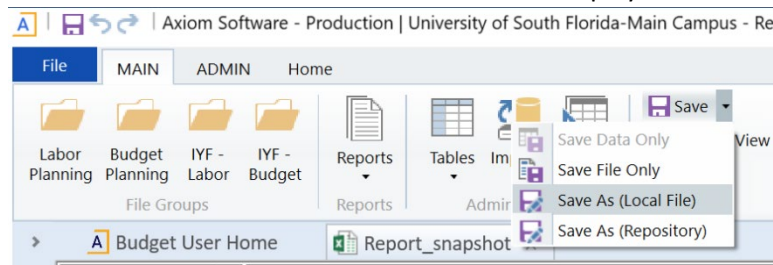
- b. You can select Refresh and change the selection criteria.



- c. All reports can be saved to the end-user's computer/drives. Select the Snapshot function and the following options.



- d. Use the dropdown arrow next to the "Save" button on the top ribbon. Select "Save As (Local File)" then a box to select the drive & folder list will display.



2. Reports

- a. IYF CarryForward – displays the adjusted budget for the current fiscal year and forecasted expenditures (Actuals + Forecast) by carry forward funds (10009, 11009, 11509, and 12009) by fund, dept and product.
- b. IYF E&G – displays the adjust budget for the current fiscal year and forecasted expenditures (Actuals + Forecast) with an adjustment for benefits (E&G) to show the expected remaining funds. Additional tabs on the report in include the same information broken down by the following categories:
 - i. Dept
 - ii. Fund
 - iii. Product
- c. IYF E&G – by Dept – displays the adjusted budget for the current fiscal year and forecasted expenditures (Actuals + Forecast) with an adjustment for benefits (E&G) to show the expected remaining funds by department.
- d. IYF E&G – by Fund - displays the adjusted budget for the current fiscal year and forecasted expenditures (Actuals + Forecast) with an adjustment for benefits (E&G) to show the expected remaining funds by fund.
- e. IYF E&G – by Product - displays the adjusted budget for the current fiscal year and forecasted expenditures (Actuals + Forecast) with an adjustment for benefits (E&G) to show the expected remaining funds by product.
- f. IYF Non E&G – displays the adjusted budget for the current fiscal year and forecasted expenditures (Actuals + Forecast). This report is broken down by the following categories:
 - i. Fund Sub-type
 1. Tuition (11000 & 11500)

2. Lottery (12000)
 3. Carry Forward (10009, 11009, 11509, and 12009)
 - ii. Chartfields – Department, Fund, Product, Initiative, Budget Account.
 - iii. Tabs – Dept, Fund, Product
 - g. IYF Non E&G – by Dept - displays the adjusted budget for the current fiscal year and forecasted expenditures (Actuals + Forecast) by department
 - h. IYF Non E&G – by Fund - displays the adjusted budget for the current fiscal year and forecasted expenditures (Actuals + Forecast) by fund.
 - i. IYF Non E&G – by Product - displays the adjusted budget for the current fiscal year and forecasted expenditures (Actuals + Forecast) by product.
 - j. IYF Chartfield report by Month – displays the actuals expenses by chartfield by month for the current fiscal year and forecasted RSA. Includes the following tabs:
 - i. IYF Chartfield report by Month – Actuals
 - ii. IYF Chartfield report by Month – Actuals Revenue
 - iii. IYF Chartfield report by Month – Adj Budget
 - iv. IYF Chartfield report by Month – Adj Budget Revenue
 - v. IYF Chartfield report by Month – IYF
 - vi. IYF Chartfield report by Month – IYF Revenue
 - k. IYF Chartfield report by Month – Actuals - displays the actual expenses by chartfield by month for the current fiscal year
 - l. IYF Chartfield report by Month – Actuals Revenue - displays the actual revenue by chartfield by month for the current fiscal year
 - m. IYF Chartfield report by Month – Adj Budget - displays the adjustment budget expenses by chartfield for the current fiscal year
 - n. IYF Chartfield report by Month – Adj Budget Revenue - displays the adjustment budget revenues by chartfield for the current fiscal year
 - o. IYF Chartfield report by Month – IYF - displays the actuals expenses by chartfield by month for the current fiscal year and forecasted RSA.
 - p. IYF Chartfield report by Month – IYF Revenue - displays the actual revenues by chartfield by month for the current fiscal year.
 - q. IYF Labor – displays the monthly actuals by position number for FY 2021
 - r. IYF Labor FY22 - displays the monthly actuals by position number for the current fiscal year FY2022
3. Additional reports are still being developed.
 - a. RMA – will develop reports prioritized based on university wide usage and critical need.
 - b. Reporting group – a limited number of college/unit users are being trained to expand the university’s reporting expertise. This training will be expanded once the initial group is developed.