Bulls Budget System

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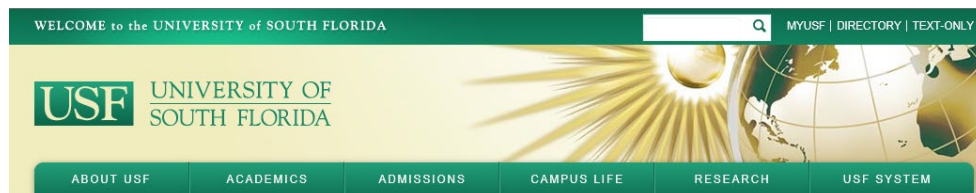
3) The Axiom home page will come up automatically after you sign in. Click on the waffle icon.

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

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.

Labor Planning

The planning files for Labor Planning are used to budget for all line positions, OPS and other labor related budget accounts. Further details can be found in subsequent pages.

- Opening a plan file
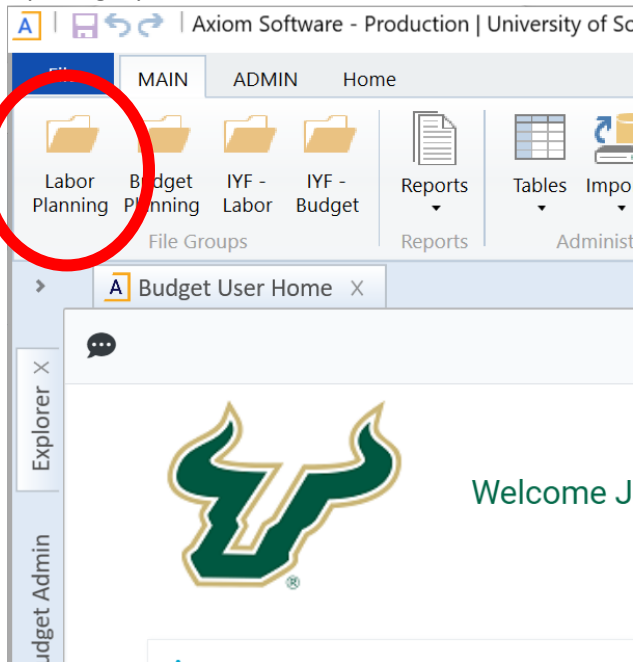
1) Click on the Labor Planning button (upper left portion of the home page)
2) A search box will appear.
3) A department number can be selected by scrolling through the list or by typing the number in the "<type here to filter list>" box.
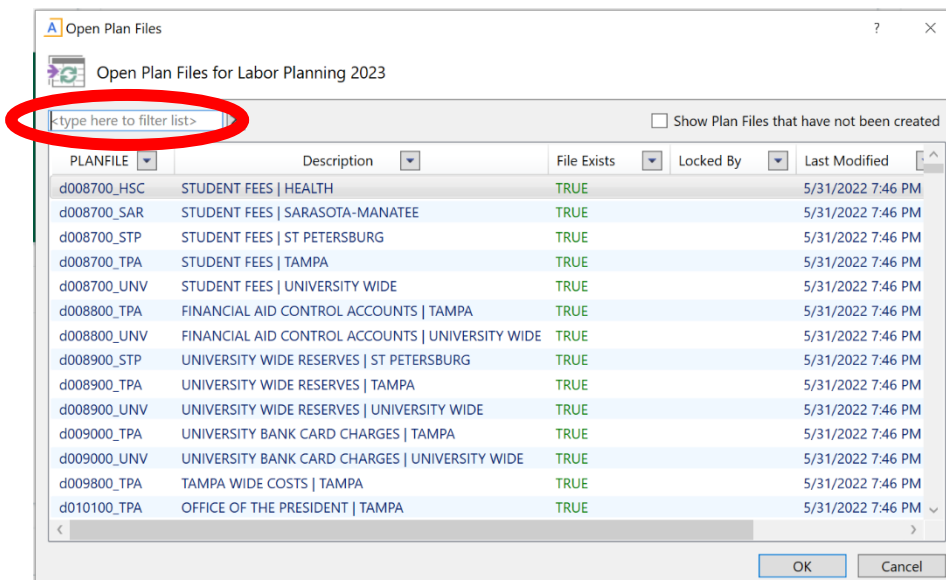
4) Click "OK" or double click the department you would like to open.
5) The system will run through some queries to populate the plan file you selected. This may take a few seconds.

6) The page below will display when the plan file is fully loaded.

7) The file will have 5 tabs listed at the bottom of the worksheet. Positions & Other Labor tabs are used to budget out the department's line positions and OPS.
    a. LaborSummary – report that summarizes the information that is brought in from GEMS or entered in by a user.
    b. Roster – report that lists all the positions contained in the plan file. The positions are listed by category, then by position number.
        i. Faculty – any position associated with pay plan 22
        ii. Staff – any position associated with pay plans 21, 23 or 24
        iii. Shared Positions – these are positions that have a different "home" department than the plan file that is open, but a portion of the position's salary is distributed to the department of the current plan file.
    c. **Positions** – sorted into the same sections as the Roster tab. Information details out each position.
    d. **Other Labor** – split into two sections that are sorted by Budget Account / fund / product / initiative.
        i. Other Labor Expenses – should include budget for the budget accounts listed below.
            1. 88028 OTHER SALARY
            2. 88029 OTHER BENEFITS
            3. 88039 GA HEALTH INSURANCE
        ii. Pooled Position Expenses - should include budget for the budget accounts listed below.
            1. 88030 OPS – GRADUATE ASSISTANT
            2. 88031 OPS – RESIDENT
            3. 88032 OPS – OTHER
            4. 88033 OPS – ADJUNCTS

5. 88034 OPS – GRADUATE ASSIST PHD
6. 88035 OPS – POST DOCS

    e. PositionRequests – functionality included to request additional positions (VP area will notify if you should use this tab)
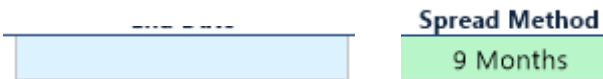
8) Select the Positions Tab
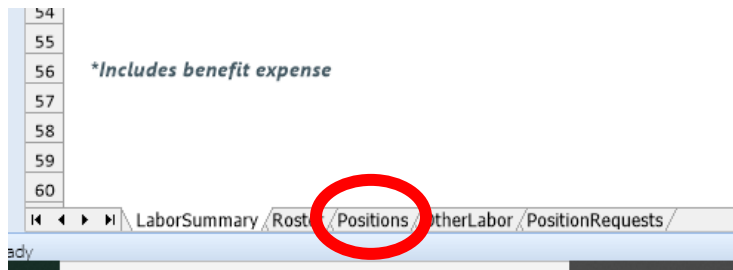
9) The screen below will come up

10) Light blue cells are the only ones that data can be entered into. Green will allow a selection from a dropdown list.

11) Each position is represented by a Gold box

12) Here is a list of each component of a position
   a. Position information – **Category** - Faculty | **Position number** 00005477 | **Position Title** – Dean & Professor| **Position type** – Faculty

Position #	Position Title	Type
Faculty		
00005477	**Dean & 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 the 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. Projected Salary $ for Distribution – the amount of salary dollars that will be budgeted.

		Effective Date
Base Rate:	$91,280	
Merit Adjustment:	0.0%	
Salary $ Adjustment 1:	$0	
Salary $ Adjustment 2:	$0	
NEW Annual Base Rate:	**$91,280**	
Stipend(s):	$15,000	
Bonuses and Non-Base Adjustments:	$0	
2023 Total Annualized Salary:	**$106,280**	
Projected Salary $ for Distribution:	106,280	

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. E&G Recurring – designation for rate in SCD should only be used for funds (10000, 10005, 11000, 12000, or 13000)
   iii. Spending Plan – amount of salary cash (current year) that will be budgeted to the chartfield identified to the left.
   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. Benefits % - calculated on previous year actuals or designated amount if line is vacant.

	2023	
	E&G Recurring	**Spending Plan**
Distribution Override	**100.00%**	**100.00%**
Distribution %	**100.00%**	**100.00%**
Distribution $	67,000	62,156
Benefits %	17.07%	17.07%

   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"
d. Select Initiative – optional – default is "000000 DEFAULT INITIATIVE"
e. Select Operating Unit – optional
f. Click "OK" button to add a new distribution row
   i. The new row will appear in Blue

11000 - TUITION	260000 - HONORS COLLEGE	0 - NO PRODUCT - BUDGET	0 - No Initiative	TPA	Distribution Override		
					Distribution %	0.00%	100.00%
					Distribution $	0	72,055
					Benefits %	38.43%	38.43%

ii. Click on Distribution Override cell to change distribution percentages. **Note:** the proposed budget will populate with 100%.

ix. Total Distributed – totals up all of the distributions. **Note:** if all the distributions exceed 100% then a [!] .

Total Distributed Salary $	$72,055	$144,109
[!] **Total % Allocated**	100.00%	200.00%
Total Benefits	$27,688	$55,377

x. Add New Employee – double click the Blue "+ " box to add a new employee. This functionality will need to be used in the following instances.

[+] Add New Employee

1. Add employee on a vacant line if they were not in GEMS when the plan files were created.
2. An employee was terminated or is anticipated to terminate. Budget can be posted for the remaining months after termination with a new employee or designated vacancy.
3. After a new employee is added, then a new distribution will also need to be added. **Refer back to viii.**

xi. Shared Positions – these are positions that are distributed to the department of the plan file being reviewed but the "home" department is another plan file. The "home" department is indicated on the position information row. Only the salary distribution to the plan file being reviewed with be displayed and you will not be able to edit the information. Contact the area that budgets the "home" department or go to the "home" department plan file to adjust. The position will show up as a regular position in the "home" plan file, not in the Shared positions category.

Shared Positions

00001824	Director of Development		Staff		This position is planned	Department 060301 - VICE PRESIDENTIAL AREA/CENTRAL	TAMPA
	Incumbent(s)			Start Date	End Date	FTE	Spread Method

13)

14) Editing monthly distribution amounts
    a. Click on "Change View" in the ribbon displayed at the top
    b. Select "Months" under Column Views.

    c. This will display the monthly spread of each distribution row. Monthly spread based on selected on the Employee information row.

    d. This allows the budget spread to be redistributed on a monthly basis.
        i. An amount entered in a month (September in the example) will change all of the subsequent months.
        ii. Changing the Spending Plan amount will only update the percentages up to the amounts input in the monthly distributions.
        iii. The monthly distribution amounts are calculated based on the pay periods that will post in that given month.

15) Navigation aids – use the "GoTo" menu in the menu ribbon to navigate the plan file more quickly.
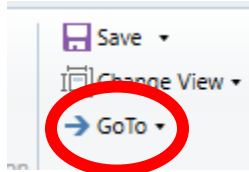
- a. Positions Tab – Planning Category – this will move the cursor to the row of the category selected. If a category isn't showing that you think should be displayed, contact RMA.
- b. Positions Tab – Employees – a drop down of all of the employees on positions will display alphabetically. Once a name 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.
- d. Position Requests Tab – Planning Category – will move the cursor to the PositionRequest tab and the category selected. Reminder – this tab will only be used if designated by the Senior VP.

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

- a. Other Labor Expenses
  - i. Sorted by Fund | Product | Initiative | Budget Account
  - ii. Amounts will populate based on the previous year's budget amounts.
  - iii. Adjustment – data entry column to budget the correct amount in for the Spending Plan (amount to be posted to FAST). If an adjustment is not entered, the budget from the previous year will be budgeted.
  - iv. Spread Method – used to spread the budget into the months. This will be useful in the In-Year Forecasting process. **See 12b for options.**
- b. Pooled Positions Expenses – used for budgeting OPS budgets.
  - i. OPS-Multiplier – the "Rate" amount is multiplied by the "Multiplier" to calculate how to budget the chartfield string to the left on the same line. The functionality allows a department to designate the number of OPS appointments by the rate of pay (annual basis) to determine the budget. A flat amount can be budgeted by putting the flat amount in the "Rate" cell and using 1 in "Multiplier" cell. The proposed budget will calculate.

1. A benefit % cell is provided if a separate budget needs to be added onto the "rate" amount (typically, not used).
2. E&G recurring – to ensure the E&G recurring non-salary is accounted for the department of the plan file being reviewed.

|				2023 Rate	2023 Multiplier	2023 Spending Plan	E&G Recurring	Spread Method
Pooled Position Expenses								
10000 - GENERAL REVENUE	000000 - DEFAULT PRODUCT	12,503	13,300	19,000.00	1	19,000	19,000	12 Months
				0.0% *<<Enter Benefits Rate*		0	0	

ii. New OPS – Detail – Allows OPS appointments to be delineated down to the appointment level (person, course, etc.).
1. Specify the identifier in the "Details Column"
2. Enter the amount for each identifier in the "Projected Budget" column.
3. E&G Recurring – account for the associated with the chartfield string.

Fund - Fund Description	Product - Product Description		Actual 2018	Budget 2019	2020 Base Budget	Adjustment	2020 Projected Budget	E&G Recurring	Spread Method
10000 - GENERAL REVENUE	0 - NO PRODUCT - BUDGET		0	0			7,000	7000	
						0.0% *<<Enter Benefits Rate*	0	0	
		Adjunct 1					3,500	3,500	12 Months
		Adjunct 2					3,500	3,500	12 Months
		Insert Additional Detail Line							

iii. New OPS – Input Monthly – allow for amounts to be input in designated months that are summed to determine the budget for that chartfield string.

Fund - Fund Description	Product - Product Description	Adjustment	2020 Projected Budget	E&G Recurring	Spread Method	July 2019 Budget	August 2019 Budget	September 2019 Budget
10000 - GENERAL REVENUE	0 - NO PRODUCT - BUDGET		1,100	1,100	Manual Input	350	0	750
		<<Enter Benefits Rate	0	0		0	0	0
+	*Insert New Chart String*							

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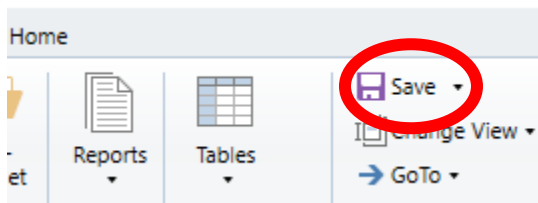

a. Any tab can be saved to an Excel file. Click the dropdown arrow and select "Save As (Local File)"

18) 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 Labor Planning to provide a complete listing of the budgets associated with a FAST department number. Further details can be found in subsequent pages.
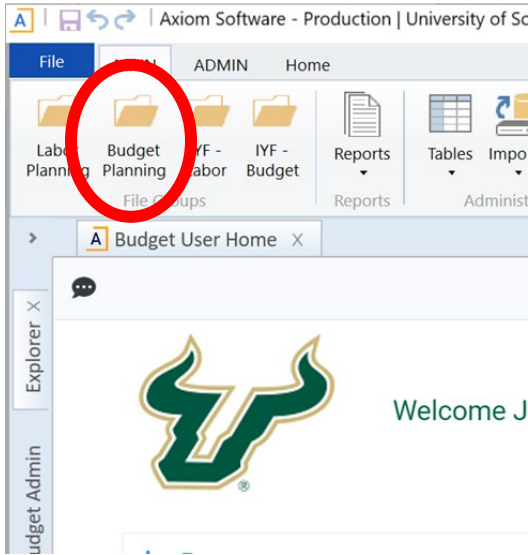
- Opening a plan file

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

BBS - Operational Budgeting

FY23 Budget: COTA MARCHING BAND | TAMPA

				Contribution - Target 0		Contribution - Actual (89,889)		

Acct	Description	Budget Method	FY 2021 Actuals	FY 2022 Actuals	FY 2022 Operating Budget	Global % Adjust	Initial Budget FY 2023	Adjustments %	Adjustments $	Spending Plan FY 2023	E&G Recurring	Comments
**FUND: 01815 - VPA Marching Band Lab Fee Aux	PRODUCT: 000000 - DEFAULT PRODUCT**												
INITIATIVE: 0000000 - DEFAULT INITIATIVE												
REVENUE												
84000	FEES	Input Adjustment	11,900	12,355	15,000	0.0%	15,000	0.0%	10,000	25,000	0	Done
	Insert additional account											
	Total Revenue		11,900	12,355	15,000		15,000			25,000		
	Net Revenues		11,900	12,355	15,000		15,000			25,000		
NON-PERSONNEL EXPENSE												
88420	MATERIALS, SUPPLIES & EQUIPMEN	Input Adjustment	10,103	12,766	14,900	0.0%	14,900	0.0%	(7,900)	7,000	0	Done
88800	OTHER EXPENSES	Input Adjustment	35	140	100	0.0%	100	0.0%	17,900	18,000	0	Done
	Insert additional account											
	Total Non-Personnel Expense		10,138	12,906	15,000		15,000			25,000		
	Net Expense		10,138	12,906	15,000		15,000			25,000		
	Net DEFAULT INITIATIVE		1,762	(551)	(0)		(0)			0		
**FUND: 01822 - USF Marching Band Aux	PRODUCT: 000000 - DEFAULT PRODUCT**												
INITIATIVE: 0000000 - DEFAULT INITIATIVE												
REVENUE												
84500	SALES EDUCATIONAL DEPARTMENTS	Input Adjustment	0	0	1,000	0.0%	1,000	0.0%	(500)	500	0	Done
85892	NON-OP INTEREST INVESTMENTS	Input Adjustment	4	0	50	0.0%	50	0.0%	(40)	10	0	Done
	Insert additional account											
	Total Revenue		4	0	1,050		1,050			510		

BudgetPlan | 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. Budget Plan – 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 Labor Plan file.

  i. The Chartfields are split into Green Boxes of Fund | Product

FUND: 01815 - VPA Marching Band Lab Fee Aux | PRODUCT: 000000 - DEFAULT 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 previous year's Operating Budget.

   1. These amounts can be adjusted by a % or Dollar amount.
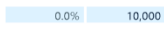
    2. If both are used the percentage will be applied first and then the dollars will be added.

    3. Negative amounts are allowed to reduce down the Initial Budget amount. The Spending Plan amount should not be negative

    4. E&G Recurring – needs to be entered separately and is not dependent on the Proposed Budget.

 v. If there is a Fund | Product that is not populated in the plan file, send an email to RMA with the chartfield and budget account and it will be added.

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
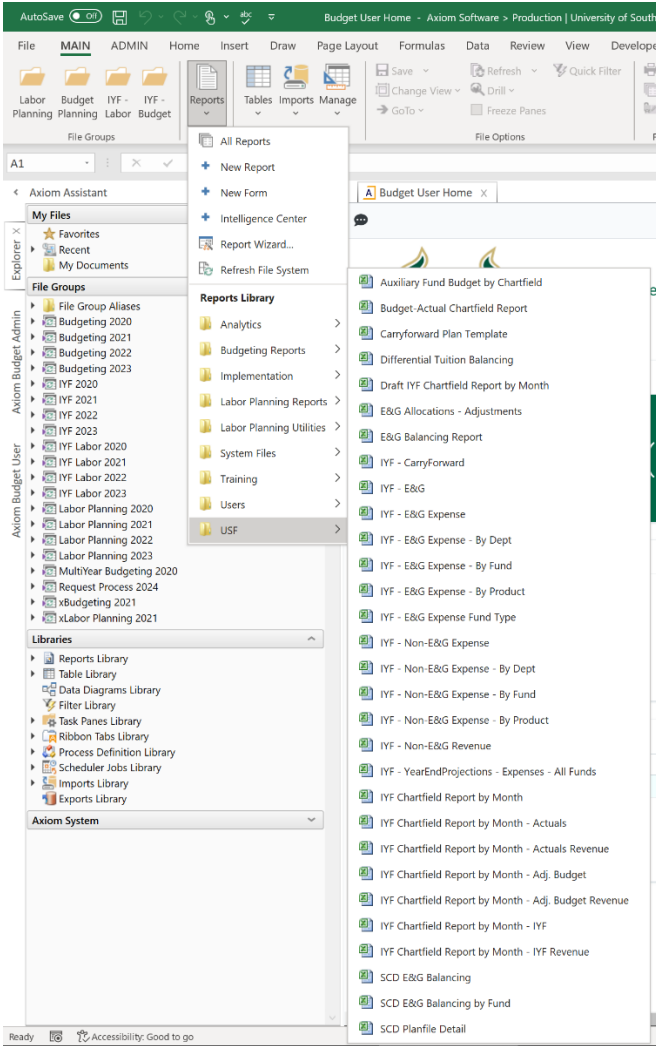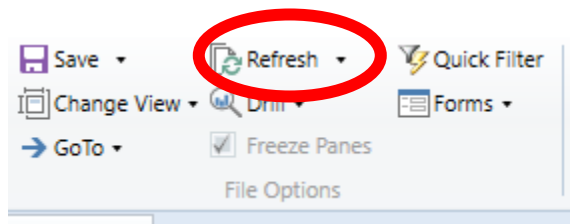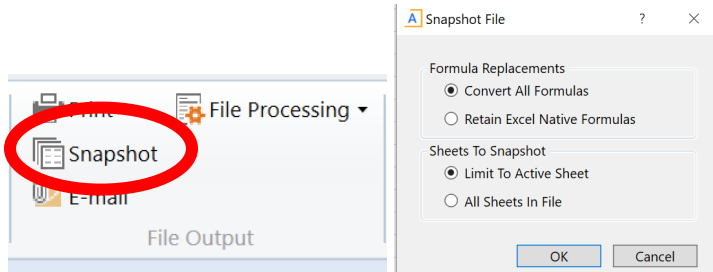

   a. Each report will have its own selection criteria.
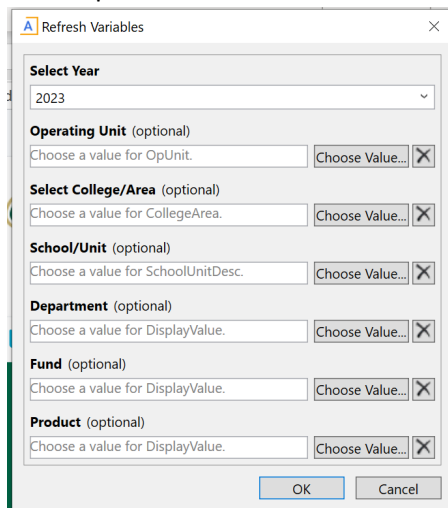
b. You can select Refresh and change the selection criteria.

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.
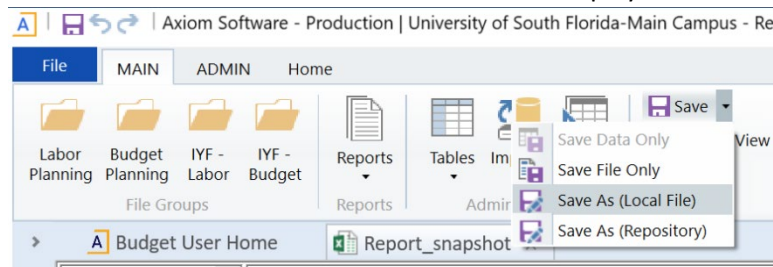
2. Reports
   a. E&G Balancing Report – Compares E&G control totals with plan file budgets for E&G Recurring and E&G spending plans.
   b. E&G Allocations – Adjustments - displays the Operating Budget for the previous year in addition to the ATOB or adjustments to the operating budget totaling the beginning operating budget for the next year.
   c. SCD E&G Balancing – displays the control vs recurring and recurring vs spending by college area, school unit, department, account and rate. There are two tabs on the report, one for just one operating unit and the other for multiple operating units
   d. SCD E&G Balancing by Fund
   e. SCD Planfile Detail – displays filled and vacant positions by college area, school, department, product, fund and or fund type. Includes position numbers, plan file, salary, stipend, op unit, non-recurring amounts, chartfield, salary plan, FTE and job description.

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.