## **Bulls Budget System**

# IYF Guide



#### Overview of system

- Components
  - In-year Forecasting (IYF)
    - IYF Labor Planning (seeded with Labor Planning)
    - IYF Budget Planning (seeded with Budget Planning)
    - Reporting In development

#### Requirements to use software

- USF has only accessed the system using PC's
- Axiom works best in Microsoft Edge

#### **Accessing Software**

- 1) Copy this web address into the browser search box <u>https://usf2.axiom.cloud</u>
- 2) A window will open to the home page. This page contains a list of the budget plan files that you are authorized to oversee.
  - a. Your initials will be displayed in the upper right corner of the webpage.
  - b. You do not need to use the waffle 🔛 any longer to go to a different client.
  - c. The <sup>O</sup> Calculation Reference</sup> link provides a description of the columns of the table below.

£						☆ @
Velcome to the Web version of BE	S. Please use th	his system to complete the F	Y 2025 Operating Budget proc	ess. Go Bulls! FE MS FEES		Calculation Referer
udget 1		2023 Actual	2024 Budget	2025 Proposed	Variance \$	Variance
2 000001 - FINANCIAL STATEMENT ISC   80000 - PROP ASSET MANAGEN	20 CT	(\$1,088,234)	\$0	\$0	\$0	0.0%
000001 - FINANCIAL STATEMENT TP   80000 - PROP ASSET MANAGEN		(\$1,895,016)	\$0	\$0	\$0	0.0%
2 000001 - FINANCIAL STATEMENT PA   80000 - PROP ASSET MANAGEN		\$1,698,295	\$0	\$0	\$0	0.0%
2 000001 - FINANCIAL STATEMENT PA   90016 - AGEN OASIS STUDENT (		\$0	\$0	\$0	\$0	0.0%
000001 - FINANCIAL STATEMENT     PA   90017 - AGEN RETURNED CHECI	Carlos and Antone A	\$209,683	\$0	\$0	\$0	0.0%

## In-Year Forecasting (IYF)

The BBS link opens to the Budget Process. Select Forecasting to select the IYF process. The plan files are listed with three chartfields in the plan file names (xxxxxx – Dept Name|OU|xxxxx – Fund Description).

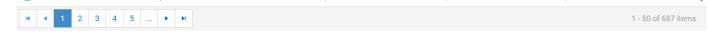
- 1) Opening a budget plan file is done by clicking the file open icon <sup>C</sup> on the left side of the plan file listing.
  - a. Finding a plan file
    - i. Use the search function 🔽 (cursor must be in Budget box above plan file list) to find any portion of alphanumeric characters in the plan file description. It is recommended to only use "Contains" and only the first search box.

MENT CONTROL I	24 Actual	2025 Revised Budget			
MENT CONTROL I		2025 Revised Budget	2025 August Forecast	Variance \$	Variance %
NAGEMENT	\$0	\$0	\$0	\$0	0.0% 🔺
EMENT CONTROL   NAGEMENT	\$566,667	\$0	\$0	\$0	0.0% 🔺
EMENT CONTROL   DENT CHECKS	\$0	\$0	\$0	\$0	0.0% 🔺
EMENT CONTROL   CHECKS	\$47,311	\$0	(\$99,384)	\$99,384	0.0% ▲
MENT CONTROL   I Holding Fnd	\$0	\$0	\$0	\$0	0.0% 🔺
	EMENT CONTROL   AGGEMENT EMENT CONTROL   DENT CHECKS EMENT CONTROL   CHECKS EMENT CONTROL	EMENT CONTROL       \$566,667       IAGEMENT     \$0       EMENT CONTROL       \$0       EMENT CHECKS     \$47,311       CHECKS     \$47,311       EMENT CONTROL       \$0	EMENT CONTROL           \$566,667         \$0           IAGE/MENT         \$0         \$0           EMENT CONTROL           \$0         \$0           EMENT CHECKS         \$0         \$0           EMENT CONTROL           \$47,311         \$0           EMENT CONTROL           \$0         \$0	MENT CONTROL   AGEMENT         \$566,667         \$0         \$0           MACEMENT         \$0         \$0         \$0           EMENT CONTROL   DENT CHECKS         \$0         \$0         \$0           EMENT CONTROL   CHECKS         \$47,311         \$0         \$0           EMENT CONTROL   CHECKS         \$0         \$0         \$0	MENT CONTROL   AAGEMENT         \$566,667         \$0         \$0         \$0           MAREMENT         \$0         \$0         \$0         \$0           EMENT CONTROL   DENT CHECKS         \$0         \$0         \$0         \$0           EMENT CONTROL   DENT CHECKS         \$47,311         \$0         \$99,384         \$99,384           EMENT CONTROL   CHECKS         \$0         \$0         \$0         \$0

ii. Scroll using the slide on the right side of the plan file box.

BUDGETING	LABOR PLANNING	FORECASTING	LABOR FORECASTING	FE MS FEES		
Forecast 1		2024 Actual	2025 Revised Budget	2025 August Forecast	Variance \$	Variance
2 000001 - FINANCIA HSC   80000 - PROP AS	L STATEMENT CONTROL   SET MANAGEMENT	\$0	\$0	\$0	\$0	0.0%
2 000001 - FINANCIA TPA   80000 - PROP ASS	L STATEMENT CONTROL   SET MANAGEMENT	\$566,667	\$0	\$0	\$0	0.0%
2 000001 - FINANCIA TPA   90016 - AGEN OA	L STATEMENT CONTROL   SIS STUDENT CHECKS	\$0	\$0	\$0	\$0	0.0%
2 000001 - FINANCIA TPA   90017 - AGEN RET	L STATEMENT CONTROL   FURNED CHECKS	\$47,311	\$0	(\$99,384)	\$99,384	0.0%
2 000001 - FINANCIA TPA   90020 - AGEN Stu	L STATEMENT CONTROL   dent Fin'l Holding Fnd	\$0	SO	\$0	\$0	0.0%

iii. The scroll function is limited to 50 plan files per page. Page selections will be displayed if you have access to more than 50 plan files.



2) The plan file will open in a new tab and open to the Forecast page.

AXIOM Budgeting ~ Home U	SF Reports - Budgeting F	Reports 🗸 🛛 Labo	r Reports 🗸 🛛 Budget	Request Reports ~ 1	forecasting Re	ports ~ Ad	ministration												n ¢	0 0 5
8 <b>9</b> F																				17 û C
0000011TFA180000 0000001 - FINANCIAL STATE!	/IENT CONTROL   1	PA   80000	- PROP ASSET	MANAGEMEN	T   August	FY2025	Forecast													Save
OVERVIEW FORECAST	CONSOLIDATED SUMMARY	NABRA	TIVES																	3
000000 - 0 = Processed Forecast \$0	August YTD FY2025 Act 90	ual	2025 Budget S0	9	Forecast Var	iance														0
Budget Group	Forecast Method	Budget 2020	Previous Forecast N/A	Proposed Forecast August FY2025	July Actual	August Forecast	September Forecast	October Forecast	November Forecast	December Forecast	January Forecast	February Forecast	March Forecast	April Porecast	May Foreca				Comments	
<ul> <li>Revenues</li> </ul>																				
+ InsetEudpetGroup Total Revenues			0							0					0	0	0	N/A		
			0	0 0				0	U	0			0	0	0	U	0	NGA		
Personnel Expense																				
+ insetBalgetGrag																				
Total Personnel Expense			0	0 0	0	(	0 0	0	0	0		0	0	0	0	0	0	N/A		
Non-Personnel Expense																				
Non-Personnel Expense			0	0 0				0	0	0		0	0	0	0	0	0	NA		
+ Inset Bulget Group																				
Total Non-Personnel Expense			0	0 0	0	(	0 0	0	0	0		0	0	0	0	0	0	N/A		
Total Expenses			D	0 0		0	0 0	0	0	0		0	0	D	0	0	0	N/A		
Net Operating Result			0	0 0														N/A		

- a. Icons located top left part of the window
  - i. @ allows a file to be attached to the plan file
  - ii. 🔎 allows a message(s) to be attached to a plan file
  - iii. 🖌 tools
    - 1. Allows a PDF to be created of the overview page
    - 2. Options not recommended for use
      - a. Diagnostic mode enabled
      - b. Fit content to window
- b. Overview basic instructions and a legend on display values
- c. Forecast row level (product/initiative) budget entry. Labor information is pulled from the labor plan files with the same chartfield combination(s). Each section can be expanded by clicking the carrot next to the Budget Group.

OVERVIEW	FORECAST	CONSOLIDATED SUMMARY	NARRATIVE	s					
000000 - 0 Proposed Forecast: \$0	E.	August YTD FY2025 Actua	202 \$0	25 Budget		▲ Forecast \	/ariance		
		Forecast	Budget	Previous Forecast	Proposed Forecast	July	August	September	October
Budg	get Group	Method	2025	N/A	August FY2025	Actual	Forecast	Forecast	Forecast
- Insert Budget Group otal Revenues			0	0		0	0 0	0	
Personnel Expense									
otal Personnel Expens	e		0	0		0	0 0	0	
on-Personnel Expen	se								
Non-Personnel Expense			0	0		0	0 0	0	
Insert Budget Group									
otal Non-Personnel Ex	pense		0	0		0	0 0	0	
otal Expenses			0	0		0	0 0	0	

3) 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 are no amounts, a zero will replace the spread amount.

NAME AND ADDRESS OF TAXABLE PARTY.		And in case of the local division of the loc	a share a																	_
OVERVIEW FORECAST	CONSOLIDATED SUMMAR	Y NA	RRATIVES																	
2000000 - 0 E A	August YTD FY2025 A 874,858)	ctual	2025 (\$1,200	Budget (127)		orecast Vari 0,579)	ance													0
Budget Group	Forecast Method	Budget 2025		Previous Porecast N/A	Proposed Ferreaut August FY2025	July Actual	August Forecast	September Forecast	October Forecast	November Forecast	December Forepast	January Forecast	February	March Forecast	April Forecast	May Forteast	June Forecast	Variance % from Budget	Correnonta	
Revenues		Locs		165		PACIEN	TUNCTUR	TOTOLON	10100.005	TUTCEN	T UNICEDS	Torectory	Torocasi	TOTOLOTE	1 CT CL LIN	Turceat	T CENCERAL	Didte	Garmana	_
Insert Budget Group																				
otal Revenues			0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	N/A		
Personnel Expense																				
Personnel Expense		1	195,235	810,560	1,205,912	74,793	137,380	91,591	91,591	91,591	91,591	137,380	91,591	91,591	91,591	91,591	123,635	83.1%		
Insert Budget Group																				
stal Personnel Expense		1,	95,235	810,560	1,205,912	74,790	137,380	91,591	91,591	591	91,591	137,380	91,591	91,591	91,591	91,591	123,635	83.1%		
Non-Personnel Expense																				
Non-Personnel Expense			7,892	0	7,793	68	788	2,046	511	511	107		611	1,2377		911		1.0%		
Q 86100 TRAVEL	Forecast Monthly		0	0	0	0	0	0	0	0	0	0	0	0	0	0	8	N/A		
Q 89200 - TELEPHONE & TELECOMMUNICATIONS	Forecast Monthly		4,000	0	4,008	68	245	890	345	345		2.0				010	8.07	(1.73)		
Q 89100 - COMPUTER RELATED - MATERIAL S	Forecast MontHy		1.003	0	917	0	83	83	- 83	83	83	83	.89	83	63	83	83	8.3%		
Q 39420 - MRTERIAL, SUPPLIES & DOLP OTH	Forecast Monthly		1,000	0	912	a	83	63	83	69	63	53	63	83	63	83	83	0.3%		
Q BRS10 REPAIRS/SAMINTENANCE/OFNOVATION	Forecast Monthly		1,500	٥	1,500	a	277	1,189	0	0	3	23	0	- 11	0	0	2	(0.0%)		
Q 89900 - OTHER OPERATING EXPENSES	Porecast Monthly		392	.0	392	0	٥	õ	0	Û	0	0	0	392	6	n.	8	0.0%		
+ Add Non-Personnel Expense																				
Incert Rudget Croup																				
tal Non-Personnel Expense			7,892	0	7,793	68	788	2,046	511	511	167	535	511	1,259	511	511	374	1.3%		
tal Expenses		1,3	03,127	810,560	1,213,705	74,858	138,169	93,636	92,102	92,102	91,757	137,915	92,102	92,850	92,102	92,102	124,009	82.6%		
let Operating Result			03,127)	(810,560)	(1,213,705)	(74,858)	(138,169)	(93,636)	(92,102)	(92,102)	(91,757)	(137,915)	(92,102)	(92,850)	(92,102)	(92,102)	(124,009)	82.6%		

- a. Click on the "+ Add Non-Personnel Expense" to add a new budget account. Do not add a budget account that is already listed, it will cause save errors.
  - + Add Non-Personnel Expense
- b. A new window will open with two selections.

Select Calc Method		×
Choose a calc method to insert		
Forecast Monthly - New Acct Forecast Total - New Acct		•
	ОК	Cancel

i. Forecast Monthly – New Acct – this will require amounts to be entered into specific months.

#### 1. Select the missing budget account and select Apply.



## ii. Forecast Total – New Acct – enter the total adjustment amount and it ill be split over the remaining months.

Budget Group	Forecast Method	Budget 2025	Previous Forecast N/A	Proposed Forecast August FY2025	July Actual	August Forecast
Revenues						
+ Insert Budget Group						
Total Revenues		0	0	0	0	
Personnel Expense						
Personnel Expense		1,195,235	810,560	1,205,912	74,790	137,38
+ Insert Budget Group						
Total Personnel Expense		1,195,235	810,560	1,205,912	74,790	137,38
Non-Personnel Expense						
<ul> <li>Non-Personnel Expense</li> </ul>		7,892	0	7,793	68	78
Q 88100 - TRAVEL	Forecast Monthly	0	0	0	0	0
Q 88200 - TELEPHONE & TELECOMMUNICATIONS	Forecast Monthly	4,000	0	4,068	68	345
<b>Q</b> 88400 - COMPUTER RELATED - MATERIAL, S	Forecast Monthly	1,000	0	917	0	83
Q 88420 - MATERIAL, SUPPLIES & EQUIP OTH	Forecast Monthly	1,000	0	917	0	83
Q 88510 - REPAIRS/MAINTENANCE/RENOVATION	Forecast Monthly	1,500	0	1,500	0	277
Q 88800 - OTHER OPERATING EXPENSES	Forecast Monthly	392	0	392	0	0
Q 82450 - CELL PHONE	Forecast Monthly - New Acct	0	0	0	0	0
Q 82300 - FOOD	Forecast Total - New Acct	0	0	0	0	

4) Comments – allows you to put comments in for each proposed budget.



5) Save – make sure you save periodically so you do not lose any data that has been input.

021100   TPA   10000 021100 - BUD	GET AND FINA	NCIAL ANALYSIS	TPA   100	00 - GENERAL RE	VENUE   Aug	ust FY2025	Forecast				Save
OVERVIEW	FORECAST*	CONSOLIDATED SUMMARY	NA	RRATIVES							_
000000 - 0 Proposed Forecast: (\$1	(,213,705)	August YTD FY2025 Act (\$74,858)	tual	2025 Budget (\$1,203,127)		Forecast Var (\$10,579)	iance				0
		Forecast	Budget	Previous Forecast	Proposed Forecast	July	August	September	October	November	December
	get Group	Method	2025	N/A	August FY2025	Actual	Forecast	Forecast	Forecast	Forecast	Forecast
Devenues											

6) Changing Product/Initiative chartfield values is done by clicking the three lines in the light blue box.



a. A window will pop up to select the Product/Initiative code combo you would like to enter budget.

Product	Initiative	Reviewed
000000 - DEFAULT PRODUCT	0 - DEFAULT INITIATIVE	×
00HOLD - BUDGET HOLDBACK	0 - DEFAULT INITIATIVE	×
CEPADA - AMERICAN DISABILITIES ACT	0 - DEFAULT INITIATIVE	×
CEPATH - ATHLETICS COMPLIANCE	0 - DEFAULT INITIATIVE	×
CEPEEO - EQUAL OPPORTUNITY AND ADA SECT	0 - DEFAULT INITIATIVE	×

- Selecting a new Product Initiative may result in the loss of unsaved changes. Would you like to save 000000 0 before proceeding?
- b. Select displayed desired combo and click to save data you entered in previous chartfield combination.

Add

Save Don't Save Close

c. If the Product/Initiative combo is not in the list, click Add.

d. A new window will open. Use the drop downs to select the desired Product/Initiative codes or type in a portion of the code and a list with those characters will display. Make sure you select both a

Product and Initiative code. Click save & Open to start budgeting.

Product		Initiative		Reviewe	d
000000 - DEFAULT F	RODUCT	0 - DEFAULT INITIATIVE		×	
00HOLD - BUDGET H	HOLDBACK	0 - DEFAULT INITIATIVE		×	
CEPADA - AMERICA	N DISABILITIES ACT	0 - DEFAULT INITIATIVE		×	
CEPATH - ATHLETIC	S COMPLIANCE	0 - DEFAULT INITIATIVE		×	
CEPEEO - EQUAL OF	PORTUNITY AND ADA SECT	0 - DEFAULT INITIATIVE		×	
		≽ Add	Save	Don't Save	Close
dd New Prod	uct and Initiative	<b>♦</b> Add	Save		Close
Add New Prod	uct and Initiative	⇒ Add	Save		Close

- i. If this combo is new and does not have any budget. Click + Insert Budget Group link and select "Non-Personnel Expense." Click "Apply."
- ii. Now an Expense account can be added by clicking + Add Non-Personnel Expense and follow directions in 3.a above.
- 7) CONSOLIDATED SUMMARY report that displays the cumulative amount by Budget Category and shows how it is spread for the fiscal year

			CONSOLIDATED	SUMMARY	NARRATIVES																	Ξ
			Actual	Antual	Budget	% Through	Previous Forecast	Proposed Forecast	July	August	September	October	November	December	January	February	March	April	May	June	Variance \$ from	Variance % from
Budget Cr	ategory	Dell	2024	July YTD FY2025	2025	Budget	N/A	August FY2025	Actual	Forecast	Budget	Budget										
Revenues																						
Total Revenues						0.0%		14	0	0	0	0	0	0	0	0	0	6	0	0		N/A
Personnel Expense																						
Personnel Expense		Q	1,749.430	07	907 1,002.3	58.5%		1,793,544	07,901	207,159	138,112	138,112	130,112	138,112	207,169	120,112	138,112	100.112	198,112	105,432	0,775	0.5%
Total Personnel Expense			1,749.430	67	901 1,802.5	58.5%		1,793,544	87,901	207.159	158,112	138,112	138,112	138,112	207.159	1\$8,112	138,112	138.112	198,112	185.482	8.775	0.5%
Non-Personnel Expense																						
Non-Personnel Expense	e	Q	136,859		448 220.7	2.4%	1	206,632	448	39,167	3,575	9,002	49,050	7,954	15,224	11,790	10,050	25,669	14,549	20,019	13,632	0.1%
Total Non-Personnel Exper	nse		136,859		448 230,1	164 2,4%		206,632	448	39,187	3,675	9,802	49,050	1,954	16,224	11,395	13,850	25,669	14,549	20,819	13,532	6.1%
Total Expenses			1,896,289	88	349 2,022,4	483 52,4%		2,000,176	88,749	246.346	141,785	147,913	187,171	140,965	223,383	149,507	151,962	163,780	162,661	207,251	22,307	1.1%
Net Operating Result			(1,886,789)	(88)	349) (2,022,4	83) 52.4%		(2,000,176)	(98,349)	(246,346)	(141,786)	(147,913)	(187,171)	(140,066)	(223,383)	(149,507)	(151,962)	(168,783)	(152,661)	(207,251)	22,307	1.1%

- 8) NARRATIVES Currently not used
- 9) Once all the data entry is completed in the plan file, save the data, and close the browser tab for the plan file.
- 10) Repeat the process for all the plan files for your area.
- 11) If any plan files are missing, email the "DEPT|OU|FUND" combo to busfin-BFA@usf.edu.

## IYF LABOR PLANNING

BBS opens to the budget planning process. To access Labor Forecasting plan files, click on the "Labor Forecasting" box on the blue menu line.



- 1) Opening a Labor plan files is done by clicking the file open icon <sup>C</sup> on the left side of the plan file listing. a. Finding a plan file.
  - i. Use the search function 🔽 (cursor must be in Budget box above plan file list) to find any portion of alphanumeric characters in the plan file description. It is recommended to only use "Contains" and only the first search box.

BUDGETING	LABOR PLANNING	FORECASTING	LABOR FORECASTING	FE MS FEES	
ecast †					
008900 - UNIVERSI	TY WIDE RESERVES   TPA				Show items with value that:
08900 - UNIVERSI	TY WIDE RESERVES   UNV				Contains 🔹
009100 - UNIVERSI	TY FRINGE BENEFIT   UNV				0211
010100 - OFFICE OF	THE PRESIDENT   TPA				And 💌
010200 - COMMEN	CEMENT   TPA				Is equal to
011000 - GOVERNN	IENT RELATIONS   TPA				
012000 - OFFICE OF	GENERAL COUNSEL   TPA				Filter Clear
013000 - UNIVERSI	TY BOARD OF TRUSTEES   TPA				Filter

#### ii. Scroll using the slide on the right side of the plan file box.

Welcome to the Web version of BBS. Please use this system to complete the FY 2025 Operating Budget process. Go Bulls!

BUDGETING	LABOR PLANNING	FORECASTING	LABOR FORECASTING	FE MS FEES						
orecast 🕇			202	5 August YTD Actual	2025 Revised Budget	2025 August Foreca				
2 008900 - UNIVERSI	TY WIDE RESERVES   TPA			\$0	\$8,289,027 \$24					
🚰 008900 - UNIVERSI	TY WIDE RESERVES   UNV			\$0	\$1,816,322	\$1,816,322 \$2,724,4				
2 009100 - UNIVERSI	TY FRINGE BENEFIT   UNV			\$13,195,874	(\$4,500,000)	\$11,459,				
2 010100 - OFFICE OF THE PRESIDENT   TPA				\$521,152	\$2,928,338	\$3,588,				
2 010200 - COMMEN	CEMENT   TPA			\$1,200	\$6,000	e e				
2 011000 - GOVERNN	IENT RELATIONS   TPA			\$165,794	\$1,234,206	\$1,118, 2				
2 012000 - OFFICE 0	GENERAL COUNSEL   TPA			\$599,166	\$3,619,869	\$3,489,				
3 013000 - UNIVERSI	TY BOARD OF TRUSTEES   TPA			\$55,482	\$387,866	\$403,9				
				6242.072	\$2.0E0.220	60 566 DI				

iii. The scroll function is limited to 50 plan files per page. Page selections will be displayed if you have access to more than 50 plan files.

	-						
M 4	1	2	3	4	5		M

#### 2) The plan file will open in a new tab and open to the overview page.

<b>A</b> Budget Home Page - USF	×	LBR 008900 - UNIVERSITY WIDE R	×
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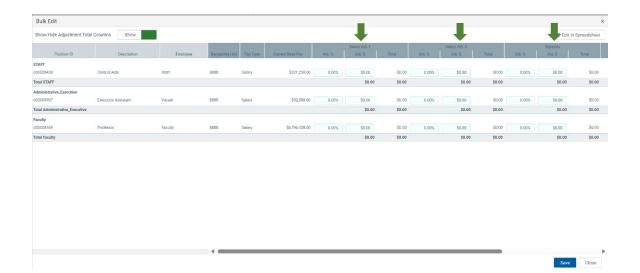
#### **OVERVIEW** - has basic instructions and a high-level budget and input amount

OVERVIEW	POSITION PLANNING	OTHER LABOR	DIS	TRIBUTION SUMMARY	SUMMARY	
2025 Labor Pl	anning			Legend		
Hi Cameron,			Historical value or ca	12,345		
Thanks for your input on t	he labor plan for 2025.					
Process				User input or editable	e cell	\$1,000
1. Complete the fields in t	he Position Planning tab.					
2. Review the results in the	e Roster tab and return to the Position Pl	anning tab		Distributions exceed	100%	<b>A</b>
to make edits, if necessar	у.					
Saving				Shared distributions		<b>#</b>
	e a service e entre	a I				

#### **POSITION PLANNING** - appointment information and budgeting through salary distributions

### 1) The 📥 Bulk Edit option will allow you to edit the salary information for all positions in the plan file.

OVERVIEW	POSITION PLANNING	отн	ER LABOR	DISTR	RIBUTION	SUMMARY	SUMMARY				🛓 Bulk Edit	Fill Position
Position ID	D	escription	Employ	ee	Note	Рау Туре	Current Base Pay	Adjustments	Proposed Base Pay	Merit	Proposed Salary	Home
STAFF												
Q d00008438	Clerical Ai	e	Staff			Salary	\$321,250.00	\$0.00	\$321,250.00	\$0.00	\$321,250.00	\$0.00
Total STAFF												\$0.00
Administrative_Execu	ıtive											
<b>Q</b> d00009997	Executive	ssistant	Vacant			Salary	\$92,500.00	\$0.00	\$92,500.00	\$0.00	\$92,500.00	\$16,256.71
Total Administrative_	Executive											\$16,256.71
Faculty												
<b>Q</b> d00008469	Professor		Faculty			Salary	\$6,796,428.00	\$0.00	\$6,796,428.00	\$0.00	\$6,796,428.00	\$0.00
Total Faculty												\$0.00
Grand Total												\$16,256.71



a. It is recommended that you only use the columns with "Adj \$" if any salary adjustments are needed (highlighted with green arrows above).

- b. There are a couple of icons that may appear on the Position List.
  - i. 🔺 indicates the total distribution(s) % exceeds 100%. It will not appear if less than 100%.
  - ii. 🎄 indicates that the position is shared with another Labor plan file.
- c. Stipends are listed in the third section



- i. Another Option is to \_\_\_\_\_\_. Clicking this button will put the data in the screen into spreadsheet format that can be cut/pasted into Excel. If you use this function, make sure to **keep the cells exactly as the ones generated**.
- ii. Once data is adjusted/verified click "Save."
- d. Access to each position is done by selecting the magnifying glass next to the desired position number. The following information will be displayed.

	A Position Employment					Regular Pay				ÞÞ
Budget Analy	yst		Bull, Rocky	/ D.		Proposed Salary:				\$55,000.00
Position ID:		d00004240	Employee ID:	d	00000164459	Base Salary:		Adj. %	Adj. \$	\$55,00.0
Start Date:		1/23/2023	Pay Type:		Salary	Merit: 0.0% on 07/01/24	4	0.0%	\$0.00	\$0.00
End Date:		ä×	Working Hours: 40		Salary Adj. 1:		0.0%	\$0.00	\$0.00	
Category:	Administra	ative_Executiv	FTE:		1.00	Salary Adj. 2:		0.0%	\$0.00	\$0.00
Bargaining Unit:		N	Spread:	12	Months 🔻	Stipends:		0.0%	\$0.00	\$0.00
🔀 Distribu	utions									2
							July	August	September	October
Dept	Fund	Product	Initiative	Opunit	Acct	Distributions	2024 Actual	2024 Forecast	2024 Forecast	2024 Forecast
021100	10000	000000	0000000	TPA	88021	Distribution Override	100.0%			
						Distribution %	100.0%	100.0%	100.0%	100.0%
						Distribution \$	3,535	7,546	5,031	5,031
						Fixed Benefits	0	0	0	0
						Variable Benefits	1,768	3,773	2,515	2,515
+ Insert New Distr	ribution					Total Distributed Salary \$	3,535	7,546	5,031	5,031
						Total % Allocated	100.0%	100.0%	100.0%	100.0%
						Total Benefits	1,768	3,773	2,515	2,515

- i. Position information (blue header) End date is the only editable field. The recommendation is to not use this field since the Labor information is on an annual basis.
- ii. Employment (green header) review this information for accuracy. The "Spread" can be adjusted here. The default value is derived from the position information. If any information is incorrect, send an email to <u>busfin-BFA@usf.edu</u>.
- iii. Regular Pay (yellow header) input any adjustment here if you did not use the bulk edit or if any further adjustments are needed.
- iv. Distributions (second section from the top) Use the FTE column for the percent distribution for each chartfield combination. The information needs to be entered using decimals (ex. 50.0% FTE – requires data entered as .5).
  - 1. Distributions cannot be deleted enter 0% to ensure amounts are not calculated.

#### 2. Use the + Insert New Distribution

a. The screen below will pop-up to enter the chartfield combination required for the new distribution. Make sure you select the correct account "Acct" code, so it matches the one the position is mapped to. Click "Apply" after all the fields are filled in.

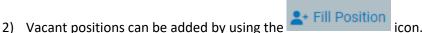
Calc Method Variables	
Dept	
Choose a value for BudgetDEPT.	• ×
Opunit	
Choose a value for BudgetOPUNIT.	▼ ×
Fund	
Choose a value for BudgetFund.	▼ ×
Product	
Choose a value for BudgetPRODUCT.	▼ ×
Initiative	
Initiative Choose a value for BudgetINITIATIVE.	▼ ×
	▼ ×

- Dept enter in the department value that is needed for the distribution. Typically, it is the same as the Labor plan file that is open.
- Opunit enter in the operating unit value of the plan file you are editing. An exception can be made if the department crosses operating units.
- Fund type the fund number or part of the description and a list will be displayed to select the desired fund code.
- Product type in characters of the product code and select the appropriate value.
- Initiative type in characters of the initiative code and select the appropriate value.
- Acct Enter the budget account for the salary plan of the position.

below) in the	Total	column (last column	before Comment).
Total Distrib	outed Salary \$ 3	\$55,232	
Tota	al % Allocated 6	100.0%	
1	Total Benefits \$	\$27,395	

b. Make sure to verify that the distribution equals 100% (highlighted in yellow

c. Click "Save" button when completed and verified.



a. The following window displays for completion. All the rows that have a \* requires a value to be entered.

ill Vacant Position		
2+ Fill Position		
* Position:	Select Position	•
* Employee Name:	Enter Name	
Start Date:	7/1/2024	i≣ ×
End Date:		tite x
Рау Туре:	Salary	•
Working Hours:		40
* Base Salary:		
Distribution		
Dept:	d240300	•
★ Fund:	Select Fund	•
* Product:	Select Product	
Initiative:	Select Initiative	
Opunit:	ТРА	
* Acct:	Select Acct	•
	Save	Close

- i. Use the drop downs to fill in each field (when available).
- ii. Position type the desired position number or part of the position and a reduced list will display. A portion of the position description can also be entered to get a list. A position needs to be selected to complete the rest of the form.
- iii. Start date Defaults to 7/1/2024 and shouldn't be changed. We are focused on the annual salary.
- iv. End Date does not need to be entered.
- v. Pay type Salary is defaulted and must not be changed.
- vi. Working hours is defaulted to 40 (hrs per week). This information can be changed to be commensurate of the FTE for the Position (0.50 FTE = 20)
- vii. Base Salary the amount budgeted for the position.
- viii. Distribution follow the same process as pay distribution on a position. Additional distributions will be able to be added once the position is saved.
  - 1. Dept defaults to the plan file department. Can be changed if needed.
  - 2. Fund type number or description to get a list to select from.
  - 3. Product type characters of the desired product or description to select from.
  - 4. Initiative type characters of the desired product or description to select from.
  - 5. Acct select the appropriate budget account that is designated for the position (88021, 88022, 88023)
  - 6. Once all the fields are populated the "Save" button will be available to be clicked.
- 3) Shared Positions will only show the distribution amounts being charged to this plan file department. The "Home Plan File" is listed in the last column to the right on the "Position Planning" screen.
- 4) Complete this for all positions in each of the Labor plan files for your area.

OTHER LABOR - Pooled Positions (OPS) and Other Labor Accounts.

OVERVIEW	POSITION PLA	INNING	OTHER LABOR	DI	ISTRIBUTION SU	MMARY	SUMMARY										≡
Pooled Position	other Labor Accor	unts															
Delete	Pooled Position	Dept	Fund	Product	Initiative	Opunit	Acct	Actual 2024	Original Budget 2025	Adjusted Budget 2025	July 2024 Actual	August 2024 Forecast	September 2024 Forecast	October 2024 Forecast	November 2024 Forecast	December 2024 Forecast	Januar Fore
88030 OPS -	- GRADUATE ASSIST	MASTERS															
PP2025d	021100_TPA_d88030 - Po	olec						0	0	0	0	0	0	0	0	0	
0		021100	28000	000000	0000000	TPA	88030	0	0	D	0	0	0	0	0	0	
	d Distribution poled Position																

- 1) The budget categories are listed for each OPS wage account. Adjust existing lines as needed. If additional budget accounts or distributions are needed, follow the instructions below.
  - a. Click "Add Pooled Position" and the window below will appear.

Calc Method Variables	
Position Name	
Dept	
Choose a value for BudgetDEPT.	•
Opunit	
Choose a value for BudgetOPUNIT.	•
Product	
Choose a value for BudgetPRODUCT.	•
Fund	
Choose a value for BudgetFund.	•
Initiative	
Choose a value for BudgetINITIATIVE.	•
Acct	
Choose a value for BudgetAcct.	•

- i. Position Name your discretion on what to name the row you are entering
- ii. Dept enter the first 4 digits of the department of the project plan and select the department of the plan file being edited.
- iii. Opunit select the Operating Unit of the plan file being edited or type in the 3-character OU.
- iv. Fund type the fund number or part of the description and a list will be displayed to select the desired fund code.
- v. Product enter in some of the characters of the desired Product code and select it.
- vi. Initiative enter in some of the characters of the desired Initiative code and select it.
- vii. Acct enter the account of the section that is being budgeted to ensure it is mapped correctly in the saved data.
- b. After selecting a calc method, a variable window will appear.

0010054

000000

021100

10000

i. Multi-Distribution Pooled Position with Input Monthly – the "Enter Description" will populate with the description of the Initiative you selected. The budget will need to be entered into each month for IYF purposes. The total of the months will be the amount posted to FAST.

Enter Description

ii. Benefits are calculated on the amounts entered in the previous steps. The total budget amount to be posted can be found if you arrow to the right of the window.

Delete	Pooled Position	Dept	Fund	Product	Initiative	Opunit	Acct	April 2025 Forecast	May 2025 Forecast	June 2025 Forecast	2025 Projected Forecast	Benefits % Amount	Total Compesation 2025
	OPS - GRADUATE ASSIST N					opani					10100001		
+	Add Pooled Position												
То	tal d88030 OPS - GRADUATE ASSIS	1						0	0	0	0		0 0
d88031	OPS - RESIDENT												
+	Add Pooled Position												
То	tal d88031 OPS - RESIDENT							0	0	0	0		0 0
188032	OPS - OTHER												
PF	2025d026100_TPA_d88032 - Poole	к						6,492	6,492	8,763	81,166	4,7	08 85,873
	DEFAULT INITIATIVE	026100	10000	SAP001	0000000	TPA	88032	3,427	3,427	4,626	43,311	5.8% 2,5	12 45,823

88031

\$0

- 2) Use the "+Add Distribution" if additional budget is needed in additional chartfield combinations.
  - a. Complete the process for all the Budget Account sections that need budget.
  - b. There is an option to delete a row that has been saved in error. Check the box under the "Delete" column and hit "Save."

Delete	Pooled Position	Dept
d88030	) OPS - GRADUATE ASSIS	TANT
🔽 S	ingle Input	240300

#### 3) Other Labor Accounts

Pooled Pos	sitions Othe	er Labor Account	S								
Dept	Fund	Product	Initiative	Opunit	Acct	Description	Actual 2024	Original Budget 2025	Adjusted Budget 2025	July 2024 Actual	August 2024 Forecast
026100	04351	SAP006	0000000	TPA	88028	OTHER SALARY	0	270,384	270,384	0	31,078

a. Click the "+ Insert New Account" link to add a new account. The "Calc Method Variables" window will appear.

Calc Method Variables	
Dept	
Choose a value for BudgetDEPT.	•
Opunit	
Choose a value for BudgetOPUNIT.	•
Fund	
Choose a value for BudgetFund.	•
Product	
Choose a value for BudgetPRODUCT.	•
Initiative	
Choose a value for BudgetINITIATIVE.	•
Acct	
Choose a value for BudgetAcct.	•

- i. Dept enter in the department value of the plan file you are editing.
- ii. Opunit enter in the operating unit value of the plan file you are editing. An exception can be made if the department crosses operating units.
- iii. Fund type the fund number or part of the description and a list will display to select the desired fund code.
- iv. Product type in characters of the product code and select the appropriate value.
- v. Initiative type in characters of the initiative code and select the appropriate value.
- vi. Acct only the allowable values will appear. Select the one that you want budgeted.
- b. After selecting all the information above, input the budget amount in the blue box and select the appropriate spread method.
- DISTRIBUTION SUMMARY displays the salary/benefits/total by Product for the plan file. Also, has drill functionality by clicking the 
   It will display by Account/Position detailed rows.
- 5) SUMMARY Home (Labor plan file) and shared (other Labor plan files) budgeted information. Also has the breakdown by pay plan and Other Labor.

## Reporting – Reports Pending