Bulls Budget System

Salary Category Detail (SCD) Guide

UNIVERSITY OF SOUTH FLORIDA

Budget and Financial Analysis

Overview of system

- Labor Planning
  - Overview – basic instructions and top-level budget information
  - Position Planning – appointment information and budgeting through salary distributions
  - Distribution Summary – salary and benefits budgeted by Product/Initiative
  - Summary – Home (Labor plan file) and shared (other Labor plan files) budgeted information. Also has the breakdown by pay plan and Other Labor.
- Reporting – limited for implementation

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 – https://usf2.axiom.cloud (new web address)

   a. If you bookmarked the address and don't see the ▭ LABOR PLANNING - SCD box displayed, go to the the "Budgeting" dropdown next to the Axiom emblem and select "Budgeting".
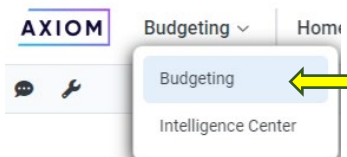
2) A window will open to the home page. This page contains a list of the sections you are authorized to use.

BUDGETING	LABOR PLANNING	FORECASTING	LABOR FORECASTING	FE MS FEES	LABOR PLANNING - SCD

   a. Your initials will be displayed in the upper right corner of the webpage ⬤CG .
   b. You do not need to use the waffle ⊞ any longer to go to a different client.
   c. The ⓘ Calculation Reference link provides a description of the columns of the table below.

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

   ⓘ Calculation Reference

Budget ↑	2023 Actual	2024 Budget	2025 Proposed	Variance $	Variance %
240100 - CDAP DEAN OFFICE	TPA	01801 - CoTA Dean's Aux	$16,500	$10,918	$12,542	($1,624)	(14.9%) ▼
240100 - CDAP DEAN OFFICE	TPA	01824 - CoTA Self-Funded	$3,866	($0)	($0)	$0	0.0% ▲
240100 - CDAP DEAN OFFICE	TPA	03725 - InEd Distance Learning Fees	$32,611	$236,700	$122,900	$113,800	48.1% ▲
240100 - CDAP DEAN OFFICE	TPA	10000 - GENERAL REVENUE	$1,807,915	$1,993,770	$1,883,324	$110,446	5.5% ▲
240100 - CDAP DEAN OFFICE	TPA	10009 - GENERAL REVENUE CARRY FORWARD	$185,853	$71,750	$250,022	($178,273)	(248.5%) ▼
240100 - CDAP DEAN OFFICE	TPA	11500 - TUITION DIFFERENTIAL	$337,345	$322,382	$387,312	($64,930)	(20.1%) ▼
240100 - CDAP DEAN OFFICE	TPA	12000 - GENERAL REVENUE					

   1 - 50 of 147 items

LABOR PLANNING - SCD

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

BUDGETING	LABOR PLANNING	FORECASTING	LABOR FORECASTING	FE MS FEES	LABOR PLANNING - SCD

1) Opening a Labor plan SCD file is done by clicking the file open icon 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.

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	LABOR PLANNING - SCD	
Budget					2025 Budget	2025 DEC
240100 - CDAP DEAN OFFICE | TPA					$1,684,199	$1,7
240102 - CDAP ACADEMIC AFFAIRS | TPA					$0	
240103 - CDAP COMM AND DEVELOPMENT | TPA					$0	
240200 - CDAP SCHOOL OF MUSIC | TPA					$2,351,274	$2,
240300 - CDAP SCH OF THEATRE AND DANCE | TPA					$1,669,833	$1,
240400 - CDAP SCH OF ART AND ART HISTRY | TPA					6,926	$2,
240500 - CDAP SPIRIT SQUAD | TPA					$0	
240700 - CDAP EVENTS PRODUCTION SRVCS | TPA					$448,945	$4

Show items with value that:

Contains

- Is equal to
- Is not equal to
- Starts with
- Contains
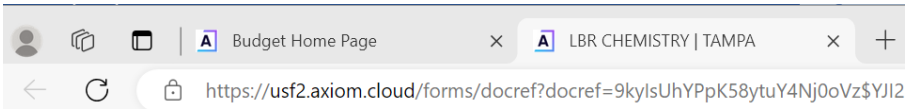- Does not contain   Show items with value that:
- Ends with
- Is null

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

BUDGETING	LABOR PLANNING	FORECASTING	LABOR FORECASTING	FE MS FEES	LABOR PLANNING - SCD	
Budget		2025 Budget	2025 DEC Proposed	Variance $	Variance	
240100 - CDAP DEAN OFFICE | TPA		$1,684,199	$1,744,752	($60,553)	(3.6%)	
240102 - CDAP ACADEMIC AFFAIRS | TPA		$0	$0	$0	0.0%	
240103 - CDAP COMM AND DEVELOPMENT | TPA		$0	$0	$0	0.0%	
240200 - CDAP SCHOOL OF MUSIC | TPA		$2,351,274	$2,338,517	$12,757	0.5%	
240300 - CDAP SCH OF THEATRE AND DANCE | TPA		$1,669,833	$1,683,029	($13,196)	(0.8%)	
240400 - CDAP SCH OF ART AND ART HISTRY | TPA		$2,416,926	$2,274,736	$142,190	5.9%	
240500 - CDAP SPIRIT SQUAD | TPA		$0	$0	$0	0.0%	
240700 - CDAP EVENTS PRODUCTION SRVCS | TPA		$448,945	$457,647	($8,702)	(1.9%)	
241200 - CDAP CONTEMPORARY ART MUSEUM |		$672,877	$700,660	($27,783)	(4.1%)	

      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.

⏮	◀	**1**	2	3	4	5	...	▶	⏭		1 - 50 of 687 items
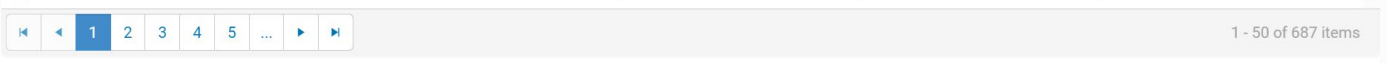
2) The plan file will open in a new tab and open to the overview page.

OVERVIEW - has basic instructions and a Legend of icons and field references

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.

   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

	Stipends	
Adj. %	Adj. $	Total

i. Another Option is to 🖉 Edit In Spreadsheet . 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 🔍 STAFF d00016957 magnifying glass next to the desired position number. The following information will be displayed.

Position
Office Manager

Position ID:	d00016957
Start Date:	1/22/2010
End Date:	
Category:	Staff
Bargaining Unit:	E

Employment
Bull, Rocky D.

Employee ID:	d00000055555
Pay Type:	Salary
Working Hours:	40
FTE:	1.00
Spread:	Even ▼

Regular Pay
Proposed Salary: $55,000.00

	Adj. %	Adj. $	
Base Salary:			$55,000.00
Merit: 0.0% on 07/01/24	0.0%	$0.00	$0.00
Salary Adj. 1:	0.0%	$0.00	$0.00
Salary Adj. 2:	0.0%	$0.00	$0.00
Stipends:	0.0%	$0.00	$0.00

Distributions

Dept	Fund	Product	Initiative	Opunit	Acct	Distributions	FTE %	July 2024	August 2024	September 2024
240300	10000	000000	0000000	TPA	88023	Distribution Override	75.0%			
						Distribution %	75.0%	75.0%	75.0%	75.0%
						Distribution $		3,452	3,452	3,452
						Fixed Benefits		0	0	0
						Variable Benefits		1,712	1,712	1,712
+ Insert New Distribution						Total Distributed Salary $		3,452	3,452	3,452
						Total % Allocated		75.0%	75.0%	75.0%
						Total Benefits		1,712	1,712	1,712

Save   Close

i. Position information (blue header) – This is informational only. There is no need for an end date since the salary information is on an annual basis and by position.
ii. Employment (green header) – This is informational only. The "Spread" is editable but doesn't need to be adjusted for the SCD. The monthly amounts will not be used. Also, working hours are not used (please ignore). The default value is derived from the position information.
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)**. Do not use the Monthly columns, it will change the distribution amounts.
1. Distributions in the blue boxes can be deleted. Do not enter in distribution percentages in the monthly distributions. The SCD requires annual salary amounts.
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.

- 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.
- Product – type in characters of the product code and select the appropriate value.
- Fund – type the fund number or part of the description and a list will be displayed to select the desired fund code.
- 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.

b. Make sure to verify that the distribution equals 100% (highlighted in yellow below) in the ___Total___ column (last column before Comment).

Total Distributed Salary $ 3	$55,232
Total % Allocated &	100.0%
Total Benefits !	$27,395

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

2) Vacant positions can be added by using the **Fill Position** icon.
    a. The following window displays for completion. All the rows that have a ✱ requires a value to be entered.


      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. Pay type = Salary is defaulted and <u>must not be changed</u>.
    iv. Working hours – is defaulted to 40 (hrs per week). This field isn't used for any calculations for Pay Type: Salary.
     v. Base Salary – the amount budgeted for the position.
    vi. Distribution – follow 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.

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.

SUMMARY – Home (Labor plan file) and shared (other Labor plan files) budgeted information. Also has the breakdown by pay plan and Other Labor.

OVERVIEW	POSITION PLANNING	DISTRIBUTION SUMMARY	SUMMARY

*The funnel can be used on both reports to view the data based on the selected criteria.
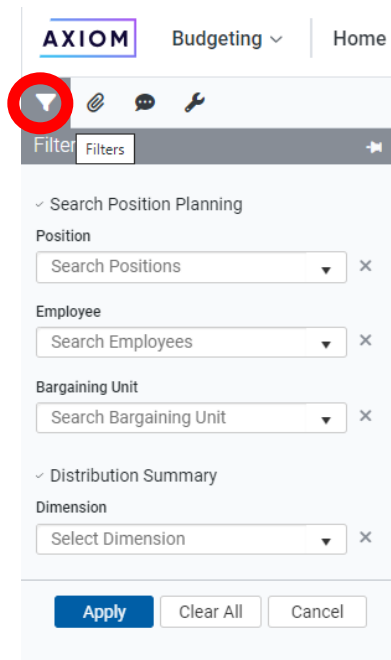
Reporting – Additional Reports Pending

1) Reports are under the USF Reports drop down menu

    a. Click the filter icon

    b. Select the desired chartfield values and click Apply.

    c. The results can be exported to Excel