

Bulls Budget System

Implementation Guide



**UNIVERSITY OF
SOUTH FLORIDA**

Budget and Financial Analysis



Overview of system

- Components
 - Budgeting
 - Revenue budgeting
 - Labor information – pulled in from Labor Planning
 - Non-labor budget entry
 - Labor Planning
 - Overview – basic instructions and top-level budget information
 - Position Planning – appointment information and budgeting through salary distributions
 - Other Labor – Pooled Positions (OPS) and Other Labor Accounts
 - 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)
- 2) A window will open to the new 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 [Calculation Reference](#) link provides a description of the columns of the table below.



AXIOM Budgeting ▾ Home USF Reports ▾ Budgeting Reports ▾ Labor Reports ▾ Administration



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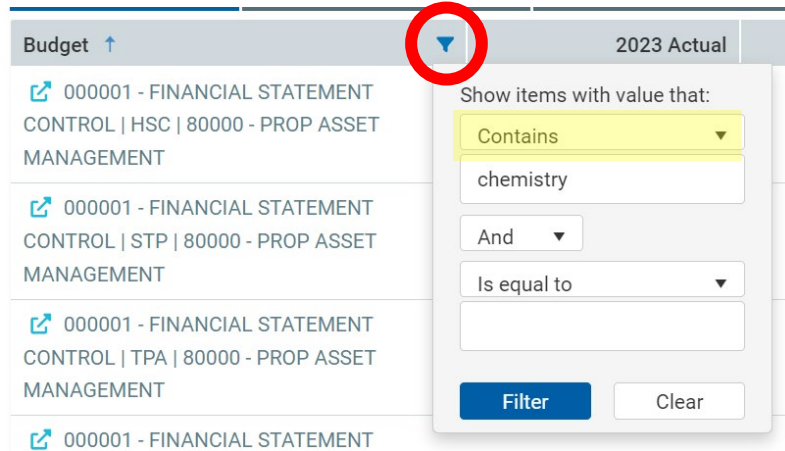
It's that time of the year again...please review your budgets below and provide inputs as indicated in the plan files. [Calculation Reference](#)

BUDGETING	LABOR PLANNING					
Budget ↑		2023 Actual	2024 Budget	2025 Proposed	Variance \$	Variance %
240100 - COTA DEAN TPA 01801 - CoTA Dean's Aux		\$16,500	\$10,067	\$555	\$9,512	94.5% ▲
240100 - COTA DEAN TPA 01824 - CoTA Self-Funded		\$3,866	\$0	(\$0)	\$0	0.0% ▲
240100 - COTA DEAN TPA 03725 - InEd Distance Learning Fees		\$32,611	\$345,477	\$122,568	\$222,909	64.5% ▲
240100 - COTA DEAN TPA 10000 - GENERAL REVENUE		\$1,807,915	\$2,096,743	\$1,251,520	\$845,222	40.3% ▲
240100 - COTA DEAN TPA 10009 - GENERAL REVENUE CARRY FORWARD		\$185,853	\$73,250	\$250,621	(\$177,372)	(242.1%) ▼
240100 - COTA DEAN TPA 11500 - TUITION DIFFERENTIAL		\$337,345	\$386,557	\$225,845	\$160,712	41.6% ▲
240100 - COTA DEAN TPA 13000 - GENERAL REVENUE SUMMER		\$72,955	\$55,310	\$132	\$55,178	99.8% ▲
240100 - COTA DEAN TPA 18300 - RESEARCH F&A DISTRIBUTION		\$29,962	\$0	\$19,350	(\$19,350)	0.0% ▲

BUDGETING

The BBS link opens to the budget planning 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  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.

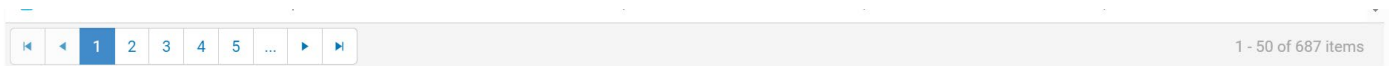


- ii. Scroll using the slide on the right side of the plan file box



Budget	2023 Actual	2024 Budget	2025 Proposed	Variance \$	Variance %
121300 - CHEMISTRY TPA 01009 - CAS Chemistry Lab Fees Aux	\$234,475	\$252,280	\$252,280	(\$0)	0.0%
121300 - CHEMISTRY TPA 01028 - CAS CHEMISTRY PEPTIDE FACILITY	\$116,950	\$32,152	\$32,152	(\$0)	0.0%
121300 - CHEMISTRY TPA 01030 - CAS STRUCTURAL CHEMISTRY CTR	\$44,670	\$49,608	\$49,608	\$0	0.0%
121300 - CHEMISTRY TPA 01031 - CAS HIGH FIELD NMR FACILITY	\$43,283	\$68,927	\$68,927	(\$0)	0.0%
121300 - CHEMISTRY TPA 01040 - CAS Fac & Equip Fees - CMMB	\$0	\$0	\$0	\$0	0.0%
121300 - CHEMISTRY TPA 01041 - CAS FAC & EQUIP FEES - CHMSTRY	\$83,078	\$249,736	\$249,736	\$0	0.0%
121300 - CHEMISTRY TPA 01060 - CAS Self-Funded	\$0	\$0	\$0	\$0	0.0%
121300 - CHEMISTRY TPA 10000 - GENERAL REVENUE	\$7,426,012	\$7,775,239	\$9,312,247	\$4,462,992	57.4%
121300 - CHEMISTRY TPA 10009 - GENERAL REVENUE CARRY FORWARD	\$398,386	\$351,096	\$100,567	\$250,529	71.4%
121300 - CHEMISTRY TPA 11500 - TUITION DIFFERENTIAL	\$853,198	\$856,230	\$499,070	\$357,160	41.7%

- 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 overview page.

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. Budget – 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.

Budget Group	Actual 2023	Original Budget 2024	Adjusted Budget 2024	Starting Point	Adjust \$	Proposed Budget 2025	Spread
Revenues							
+ Insert Budget Group							
Total Revenues	0	0	0			0	
Personnel Expense							
+ Personnel Expense	1,123,442	1,266,992	1,365,363			940,365	
+ Insert Budget Group							
Total Personnel Expense	1,123,442	1,266,992	1,365,363			940,365	
Non-Personnel Expense							
- Non-Personnel Expense	73,070	25,000	17,390			24,894	
Q 88100 - TRAVEL	14,838	5,000	5,000	FY 2024 Budget	0	5,000	History - Act...
Q 88250 - CONTRACTUAL SERVICES	1,201	500	500	FY 2023 Actual	0	500	History - Act...
Q 88400 - COMPUTER RELATED - MATERIAL, S	4,697	2,000	2,000	FY 2024 Budget	0	2,000	History - Act...
Q 88420 - MATERIAL, SUPPLIES & EQUIP OTH	11,523	2,000	2,000	Zero Based	0	2,000	History - Act...

- i. Budget input can be done in 3 different ways (Prior year actuals, Current year Original Budget, and Zero Based) selected from the dropdown in the “Starting Point” column.
 - 1. FY 20XX Actuals – starts with prior fiscal year budget (highlighted in yellow below) and allows an amount to be entered in the “Adjust \$” column (identified by a blue box). This amount will be combined with the prior year actuals to calculate the proposed budget for next fiscal year (highlighted in green below).

Budget Group	Actual 2023	Original Budget 2024	Adjusted Budget 2024	Starting Point	Adjust \$	Proposed Budget 2025	Spread
Total Revenues	0	0	0			0	
Personnel Expense							
Personnel Expense	1,123,442	1,266,992	1,365,363			940,365	
+ Insert Budget Group							
Total Personnel Expense	1,123,442	1,266,992	1,365,363			940,365	
Non-Personnel Expense							
Non-Personnel Expense	73,070	25,000	17,390			1,034,732	
88100 - TRAVEL	14,838	5,000	5,000	FY 2023 Actual	1,000,000	1,014,838	History - Act...

- 2. FY20xx+1 Budget – same as the one above except the starting point (yellow below) is the current fiscal year budget to combine with the “Adjust \$” (blue below) results in Proposed Budget (green below).

Budget Group	Actual 2023	Original Budget 2024	Adjusted Budget 2024	Starting Point	Adjust \$	Proposed Budget 2025	Spread
Non-Personnel Expense							
Non-Personnel Expense	73,070	25,000	17,390			924,894	
88100 - TRAVEL	14,838	5,000	5,000	FY 2024 Budget	900,000	905,000	History - Act...

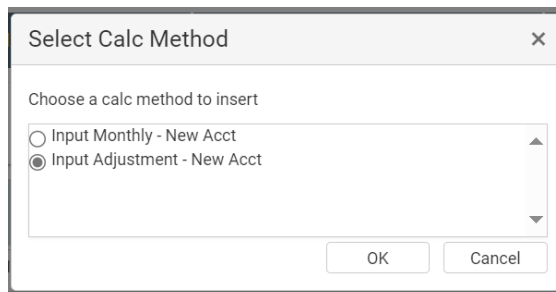
- 3. Zero Based – the amount entered in “Adjust \$” (blue box) will equal the “Proposed Budget” (green below).


Budget Group	Actual 2023	Original Budget 2024	Adjusted Budget 2024	Starting Point	Adjust \$	Proposed Budget 2025	Spread
Non-Personnel Expense							
Non-Personnel Expense	73,070	25,000	17,390			819,894	
88100 - TRAVEL	14,838	5,000	5,000	Zero Based	800,000	800,000	History - Act...

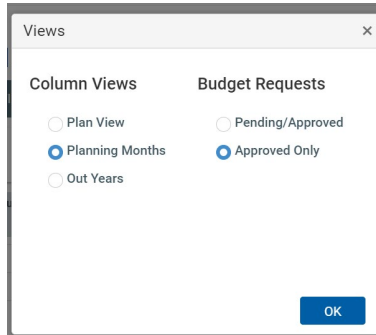
- ii. Click on the “+ Add Non-Personnel Expense” to add a new budget account. Do not add a budget account that is already listed, it will cause save errors.

+ Add Non-Personnel Expense

- iii. A new window will open with two selections. The preferred option is “Input Adjustment – New Acct.”



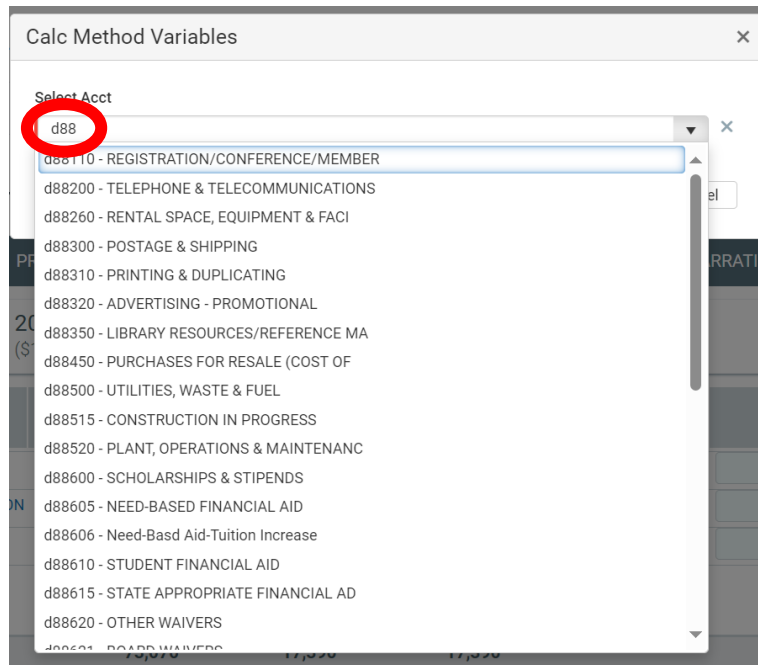
1. Input Monthly – New Acct – this will require amounts to be entered into specific months. It will also require changing the view of the plan file using the  icon located on the right of the window above the grey header row.
 - a. Select “Planning Months” and click “OK” to display the Months to enter in each amount in the blue boxes.



- b. To go back to the original view, select the icon again and select the “Plan View” and click “OK.”

2. Input Adjustment – New Acct – enter the adjustment amount. Typically, this will be the budget amount since there is not an amount to adjust.

- iv. Select the desired budget account. Type in “d88” to limit the list to CC_ORG budget accounts, then click “Apply”. You can type in the whole budget account if you know it.



- d. Spread – make sure you have a “Spread” method selected for each row. The default value is “History – Actuals.” The other options are self-explanatory.

Personnel Expense						
-Personnel Expense	73,070	17,390	17,390		17,390	
88100 - TRAVEL	14,838	5,000	5,000	FY 2024 Budget	0	History - Act...
88250 - CONTRACTUAL SERVICES	1,201	500	500	FY 2024 Budget	0	
88400 - COMPUTER RELATED - MATERIAL, S	4,697	2,000	2,000	FY 2024 Budget	0	History - Act...

- e. The next four columns are not being used: Budget Commitments, Budget Requests One-time, Budget Requests Recurring, and Final Budget. They may be used in the future.
- f. Comments – allows you to put comments in for each proposed budget

- g. SAVE – make sure you save periodically so you do not lose any data that has been input

240300 | TPA | 10000
240300 - COTA SCHOOL OF THEATRE | TPA | 10000 - GENERAL REVENUE | Budget

OVERVIEW BUDGET PRODUCT / INITIATIVE REVIEW CONSOLIDATED SUMMARY NARRATIVES

000000 - 0 Proposed Budget: (\$25,000) 2023 Actual (\$1,196,512) 2024 Budget (\$1,379,048) Proposed Budget to Actual \$1,171,512

Budget Group	Budgeted Commitments 2025	Budget Requests 2025 One-Time	Budget Requests 2025 Recurring	Final Budget 2025	Comments
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- h. Changing Product/Initiative chartfield values is done by clicking the three lines in the light blue box.

000000 - 0
Proposed Budget: (\$25,000)

- i. 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	X
000000 - DEFAULT PRODUCT	COLLEGE - College F&A Rebate	X
VPACMP - COTA COMPUTER REFRESH	0 - DEFAULT INITIATIVE	X
VPACRG - COTA CONFERENCE REGISTRATION	25678 - Morris, Merry Lynn	X
VPACRG - COTA CONFERENCE REGISTRATION	85359 - Scott, Andee	X

Selecting a new Product - Initiative may result in the loss of unsaved changes. Would you like to save 000000 - 0 before proceeding?

Add Save Don't Save Close

- ii. Select displayed desired combo and click **Save** to save data you entered in previous chartfield combination.
- iii. If the Product/Initiative combo is not in the list, click **Add**.
- iv. 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	Reviewed
000000 - DEFAULT PRODUCT	0 - DEFAULT INITIATIVE	X
000000 - DEFAULT PRODUCT	COLLEGE - College F&A Rebate	X
VPACMP - COTA COMPUTER REFRESH	0 - DEFAULT INITIATIVE	X
VPACRG - COTA CONFERENCE REGISTRATION	25678 - Morris, Merry Lynn	X
VPACRG - COTA CONFERENCE REGISTRATION	85359 - Scott, Andee	X

Add New Product and Initiative

Select Product Type to search

Select Initiative Type to search

Creating a new Product - Initiative may result in the loss of unsaved changes. Would you like to save 000000 - 0 before proceeding?

Save & Open Open Only

1. If this combo is new and does not have any budget. Click **+ Insert Budget Group** link and select "Non-Personnel Expense." Click "Apply."

2. Now an Expense account can be added by clicking [+ Add Non-Personnel Expense](#) and follow directions in 2.ii above.

- i. **PRODUCT / INTIATIVE REVIEW** – report that shows summary budget information for each Product/Initiative combination that has been budgeted in the plan file. The Budget tab information will need to be saved before this report is updated.

OVERVIEW	BUDGET	PRODUCT / INITIATIVE REVIEW	CONSOLIDATED SUMMARY	NARRATIVES		
Budget Category	Budget 2024	Total 2025	Variance	000000 - DEFAULT 0 - DEFAULT INITIATIVE	000000 - DEFAULT COLLEGE - College F&A	VPACMP - COTA 0 - DEFAULT INITIATIVE
Revenues						
Total Revenues	-	-	N/A ▼	-	-	-
Personnel Expense						
Personnel Expense	1,371,363	-	N/A ▲	-	-	-
Total Personnel Expense	1,371,363	-	N/A ▲	-	-	-
Non-Personnel Expense						
Non-Personnel Expense	59,977	17,594	(240.9%) ▲	17,594	-	-
Total Non-Personnel Expense	59,977	17,594	(240.9%) ▲	17,594	-	-

- j. **CONSOLIDATED SUMMARY** – report that displays the cumulative amount by Budget Category and shows how it is spread for the next fiscal year

OVERVIEW	BUDGET*	PRODUCT / INITIATIVE REVIEW	CONSOLIDATED SUMMARY	NARRATIVES							
Budget Category	Drill	Actual 2022	Actual 2023	Actual Mar YTD	Budget 2024	% Through Budget	Annualized 2024	Base Budget 2025	Final Budget 2025	Spread Check	July Budget
Revenues											
Total Revenues		0	0	0	0	0.0%	0	0	0		
Personnel Expense											
Personnel Expense		0	1,123,442	1,158,960	1,371,363	84.5%	1,545,280	0	0		
Total Personnel Expense		-	1,123,442	1,158,960	1,371,363	84.5%	1,545,280	-	-		
Non-Personnel Expense											
Non-Personnel Expense		0	171,863	45,314	59,977	75.6%	60,418	59,977	17,594		
Total Non-Personnel Expense		-	171,863	45,314	59,977	75.6%	60,418	59,977	17,594		

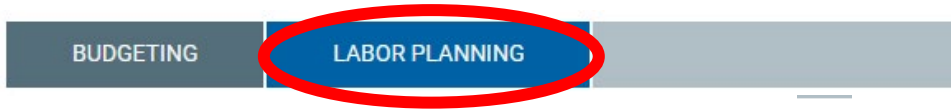
- k. **NARRATIVES** – Allows notes to be added to each plan file.



OVERVIEW	BUDGET*	PRODUCT / INITIATIVE REVIEW	CONSOLIDATED SUMMARY	NARRATIVES
0				

- 3) Once all the data entry is completed in the plan file, save the data, and close the browser tab for the plan file.
- 4) Repeat the process for all the plan files for your area.
- 5) If any plan files are missing, email the “DEPT|OU|FUND” combo to busfin-BFA@usf.edu.

LABOR PLANNING

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



- 1) Opening a Labor plan files 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.

A screenshot of the budget planning interface. At the top, there are tabs for 'BUDGETING' and 'LABOR PLANNING'. Below the tabs is a table with a header 'Budget' and several rows of budget items, each with a file open icon on the left. A search dropdown menu is open over the table, showing options: 'Contains', 'Is equal to', 'Is not equal to', 'Starts with', 'Contains', 'Does not contain', 'Ends with', 'Is null', and 'Is not null'. The 'Contains' option is highlighted in blue, and a red arrow points to it. A red circle highlights the dropdown arrow icon in the table header.

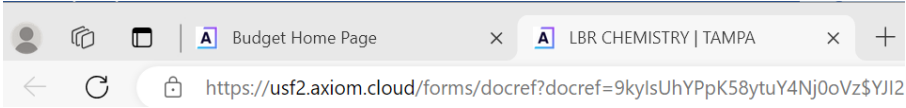
- ii. Scroll using the slide on the right side of the plan file box.

It's that time of the year again...please review your budgets below and provide inputs as indicated in the plan files.

A screenshot of the budget planning interface showing a table of budget items. The table has columns for 'Budget' and '2025 Proposed'. The 'Budget' column contains the same list of budget items as in the previous screenshot. The '2025 Proposed' column contains numerical values. A vertical scrollbar is visible on the right side of the table, circled in red. At the bottom of the page, there is a pagination control showing '1 - 50 of 687 items' and a set of navigation buttons.

- 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 overview page.



OVERVIEW - has basic instructions and a high-level budget and input amount

OVERVIEW	POSITION PLANNING	OTHER LABOR	DISTRIBUTION SUMMARY	SUMMARY
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2025 Labor Planning

Hi Cameron,

Thanks for your input on the labor plan for 2025.

Process

1. Complete the fields in the Position Planning tab.
2. Review the results in the Roster tab and return to the Position Planning tab to make edits, if necessary.

Saving

Legend

- Historical value or calculation (not changeable) 12,345
- User input or editable cell \$1,000
- Distributions exceed 100% ▲
- Shared distributions 👤

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	OTHER LABOR	DISTRIBUTION SUMMARY	...	Bulk Edit	Fill Position	☰	
Position ID	Description	Employee	Note	Bargaining Unit	Pay Type	Current Base Pay	Adjustments	Propos
STAFF								
d00016957	Office Manager	Bull, Rocky D.		E	Salary	\$55,00.00	\$0.00	
Total STAFF								
Faculty								
d00002964	Assoc Professor of Instruction	Bull, Rocky A.		E	Salary	\$58,00.00	\$0.00	
d00003241	Assistant Professor			E	Salary		\$0.00	
d00003514	Associate Professor			E	Salary		\$0.00	
d00003527	Associate Instructor			E	Salary		\$0.00	
d00003584	Associate Instructor			E	Salary		\$0.00	


Bulk Edit														
Show/Hide Adjustment Total Columns <input type="checkbox"/> Show <input checked="" type="checkbox"/>														
Position ID	Description	Employee	Bargaining Unit	Pay Type	Current Base Pay	Adj. %	Adj. \$	Total	Adj. %	Adj. \$	Total	Adj. %	Adj. \$	Total
STAFF														
d00016957	Office Manager	Bull, Rocky D.	E	Salary	\$55,00.00	0.00%	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	0.00%	\$0.00	\$0.00
Total STAFF														
Faculty														
d00002964	Assoc Professor of Instruction	Bull, Rocky A.	E	Salary	\$58,00.00	0.00%	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	0.00%	\$0.00	\$0.00
d00003241	Assistant Professor		E	Salary		0.00%	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	0.00%	\$0.00	\$0.00
d00003514	Associate Professor		E	Salary		0.00%	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	0.00%	\$0.00	\$0.00


- 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 . 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  100016957 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: d0000065350

Pay Type: Salary

Working Hours: 40

FTE: 1.00

Spread:

Regular Pay

Proposed Salary: \$55,000.00

Base Salary: \$55,000.00

Merit: 0.0% on 07/01/24

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
							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

[+ Insert New Distribution](#)

- 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 busfin-BFA@usf.edu.
- 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 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

Choose a value for BudgetINITIATIVE.
▼
✕

Acct

Choose a value for BudgetAcct.
▼
✕

Apply

Cancel


- 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.

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

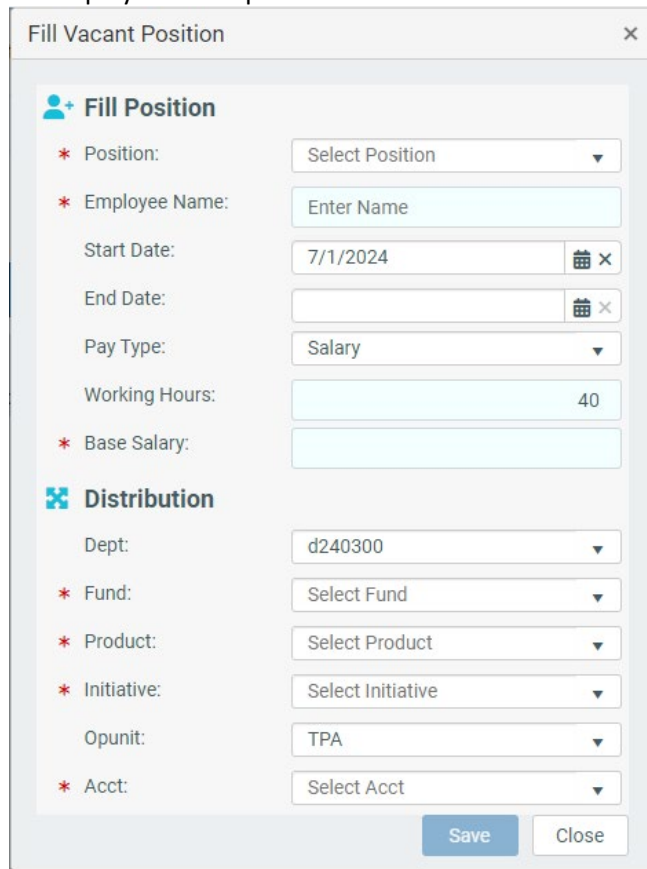
below) in the Total column (last column before Comment).

Total Distributed Salary \$ 3	\$55,232
Total % Allocated 6	100.0%
Total Benefits 1	\$27,395

- c. Click “Save” button when completed and verified.

2) Vacant positions can be added by using the  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. 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 is information and 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 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 PLANNING	OTHER LABOR	DISTRIBUTION SUMMARY	SUMMARY					
Pooled Positions		Other Labor Accounts							
Delete	Pooled Position	Dept	Product	Initiative	Opunit	Acct	Actual 2023	Budget 2024	FTE
d88030 OPS - GRADUATE ASSISTANT									
+ Add Pooled Position									
Total d88030 OPS - GRADUATE ASSIST							0	0	0.00

d88031 OPS - RESIDENT

- 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.

- b. Once a Calc Method is selected a ‘Variables’ window will display.

- i. Position Name – your discretion on what to name the row you are entering
 - ii. Bargaining Unit – enter “_” as the default or select the first option on the drop down.
 - iii. Dept – enter the first 4 digits of the department of the project plan and select the department of the plan file being edited.
 - iv. Opunit – select the Operating Unit of the plan file being edited or type in the 3-character OU.
 - v. Fund – type the fund number or part of the description and a list will be displayed to select the desired fund code.
 - vi. Product – enter in some of the characters of the desired Product code and select it.
 - vii. Initiative – enter in some of the characters of the desired Initiative code and select it.
 - viii. Acct – enter the account of the section that is being budgeted to ensure it is mapped correctly in the saved data.

- c. After selecting a calc method, a variable window will appear.

- i.
- ii. 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	240300	10000	000000	0000000	TPA	88031	0	Input Monthly	\$0	\$0	\$0
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+ Add Distribution

- iii. Multi-Distribution Pooled Position with Volume x Rate. Enter in a description, Volume (number of employees), Rate (amount each employee’s budget) and Spread. Budget will be calculated by multiplying the Volume times Rate.

Delete	Pooled Position	Dept	Product	Initiative	Opunit	Acct	Actual 2023	Budget 2024	FTE	Volume	Rate	2025 Projected Budget	Spread
d88030 OPS - GRADUATE ASSISTANT													
<input type="checkbox"/>	Volume Rate						0	0				0	
<input type="checkbox"/>	Enter Description	240300	000000	0000000	TPA	88030			0.00	1	0	0	Even

+ Add Distribution

- iv. Multi-Distribution Pooled Position with Input Adjustment – input the budget and the spread method. Enter information into the blue boxes under Pooled Position (description), Projected Budget, and select a Spread. FTE can be entered if you would like, but it is not required.

Delete	Pooled Position	Dept	Product	Initiative	Opunit	Acct	Actual 2023	Budget 2024	FTE	Volume	Rate	2025 Projected Budget	Spread
d88030 OPS - GRADUATE ASSISTANT													
<input type="checkbox"/>	GA's						0	0				0	
<input type="checkbox"/>	Graduate Assistants	240300	000000	0000000	TPA	88030			5.00			50,000	9 Months

- v. 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	ch 2025 Budget	April 2025 Budget	May 2025 Budget	June 2025 Budget	2025 Projected Budget	Benefits %	Benefits Amount	Plan 2025
<input type="checkbox"/>	Enter Description	240300	10000	000000	0000000	TPA	88030	5,128	5,128	2,051	0	50,000	10.8%	5,400	55,400

- 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 ASSISTANT		
<input checked="" type="checkbox"/>	Single Input	240300

3) Other Labor Accounts

Pooled Positions		Other Labor Accounts			
Dept	Product	Initiative	Opunit	Acct	Descrip
+ Insert New Account					
Total Other Labor Expenses					

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

The screenshot shows a dialog box titled "Calc Method Variables" with a close button (X) in the top right corner. Inside the dialog, there are six dropdown menus, each with a red exclamation mark icon on the left and an 'X' icon on the right. The dropdowns are labeled as follows:

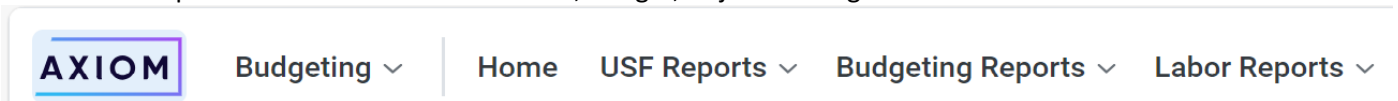
- Dept: Choose a value for BudgetDEPT.
- Opunit: Choose a value for BudgetOPUNIT.
- Fund: Choose a value for BudgetFund.
- Product: Choose a value for BudgetPRODUCT.
- Initiative: Choose a value for BudgetINITIATIVE.
- Acct: Choose a value for BudgetAcct.

 At the bottom right of the dialog, there are two buttons: "Apply" (highlighted in blue) and "Cancel".

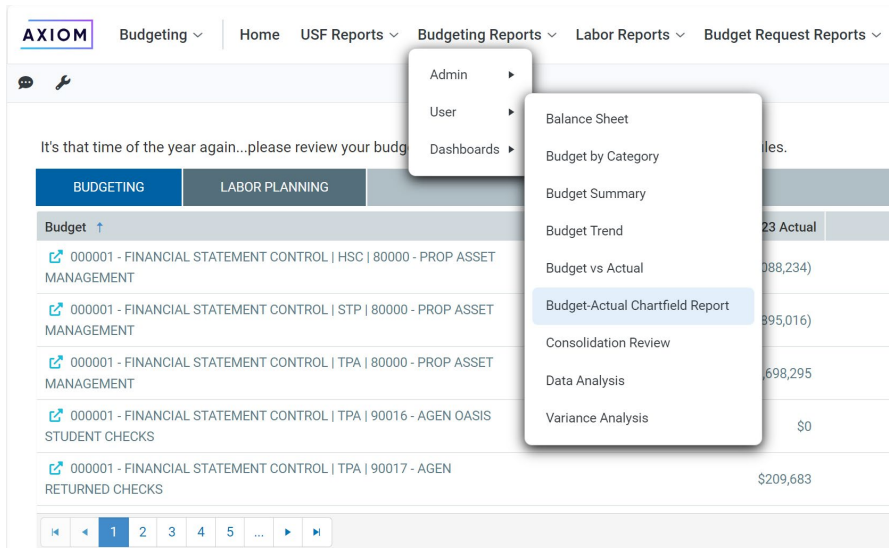
- i. Dept – enter in the department value of the plan file you are editing.
 - ii. Opunit – enter in the operating unit value of the plan file you are editing. An exception can be made if the department crosses operating units.
 - iii. Fund – type the fund number or part of the description and a list 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.
- 4) 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 – Additional Reports Pending

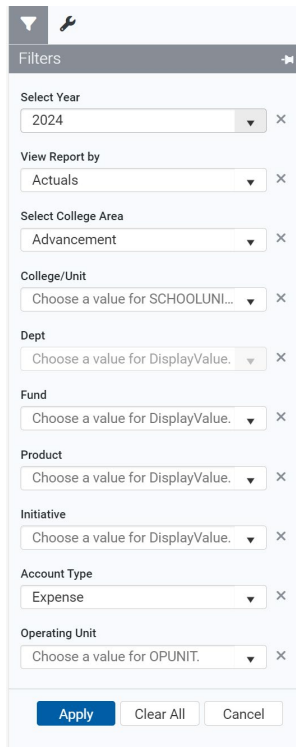
- 1) Budget to Actual Chartfield report
 - a. Reports 3 chartfield details - Actuals, Budget, Adjusted Budget



- b. Location - Budgeting Reports>User>Budget-Actual Chartfield Report



c. Click the filter icon 



d. Select the desired chartfield values and select to view the Report by Actuals, Budget or Adjusted Budget and click Apply.

e. The results can be exported to Excel

