

Bulls Budget System

IYF Guide



Overview of system

- x Components
 - o In-year Forecasting (IYF)
 - f* IYF Labor Planning (seeded with Labor Planning)
 - f* IYF Budget Planning (seeded with Budget Planning)
 - f* Reporting – In development

Requirements to use software

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

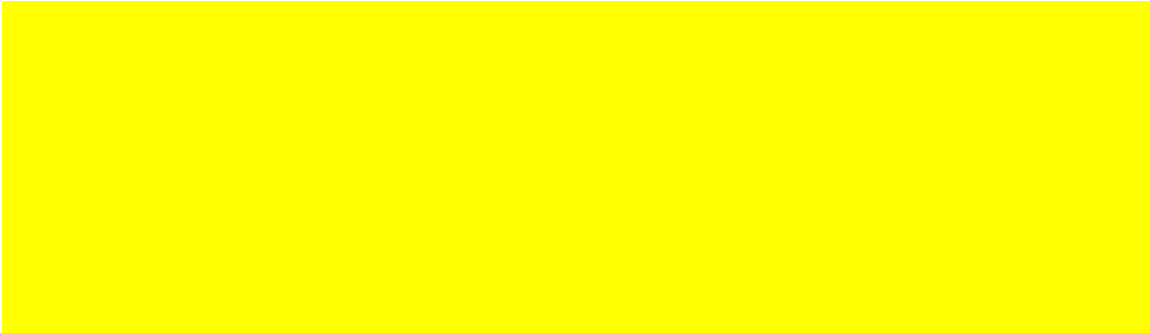
Accessing Software

- 1) Copy this web address into the browser search box – <https://usf2.axiom.cloud>
- 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. Yu are p

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).

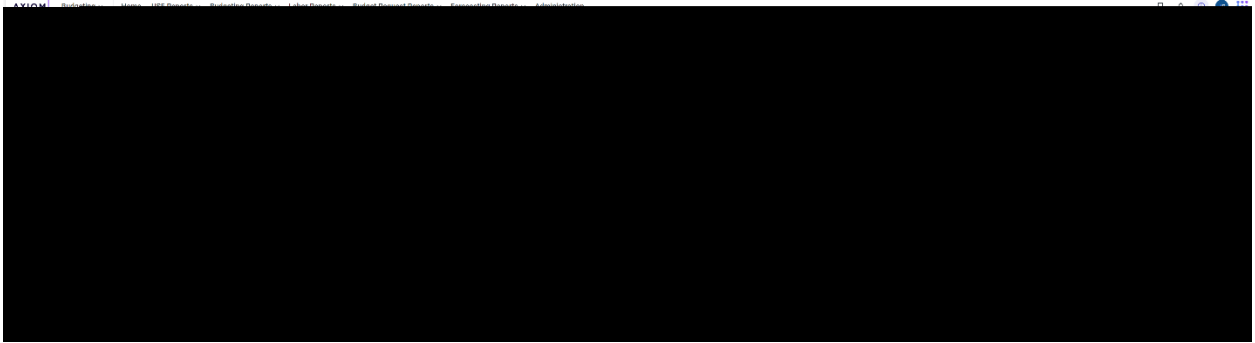
- 1) Opening a budget plan file is done by clicking the file open icon on the left side of the plan file listing.
 - a. Finding a plan file
 - i. Use the search function (cursor must be in Budget box above plan file list) to find any portion of alphanumeric characters in the plan file description. It 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.

- iii. The scroll function is limited to 50 plan files per page.

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

000001 | TPA | 80000

000001 - FINANCIAL STATEMENT CONTROL TPA | REVENUE | DDOD ASSET MANAGEMENT | August FY2025 Forecast

OVERVIEW FORECAST CONSOLIDATED SUMMARY NARRATIVES

000000 - 0 August YTD FY2025 Actual 20% Budget Forecast Variance

Budget Group	Forecast Method	Budget 2025	Previous Forecast	Proposed Forecast August FY2025	July Actual	August Forecast	September Forecast	October Forecast
+ Insert Budget Group								
Total Revenues		0	0	0	0	0	0	0
▶ Personnel Expense								
+ Insert Budget Group								
Total Personnel Expense		0	0	0	0	0	0	0
▶ Non-Personnel Expense								
+ Insert Budget Group								
Total Non-Personnel		0	0	0	0	0	0	0
Total Expenses		0	0	0	0	0	0	0
Net Operating Result		0	0	0	0	0	0	0

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

Budget Group	Forecast Method	Budget 2025	Previous Forecast	Proposed Forecast August 1 - 7, 2025	July Actual	August Forecast
Revenues						
+ Insert Budget Group						
Total Revenues		0	0	0	0	0
Personnel Expense						
+ Insert Budget Group						
Total Personnel Expense		1,195,235	810,560	1,205,912	74,790	137,380
Non-Personnel Expense						
+ Insert Budget Group						
Total Non-Personnel Expense		7,892	0	7,793	68	788
88330 - TRAVEL	Forecast Monthly	0	0	0	0	0
88200 - TRAVEL	Forecast Monthly	0	0	0	0	0
88400 - COMPUTER RELATED - MATERIALS	Forecast Monthly	1,000	0	917	0	83
88400 - COMPUTER RELATED - MATERIALS	Forecast Monthly	1,000	0	917	0	83
88510 - REPAIRS/MAINTENANCE/RENOVATION	Forecast Monthly	1,500	0	1,500	0	417
88800 - OTHER OPERATING EXPENSES	Forecast Monthly	392	0	392	0	0
82450 - CELL PHONE	Forecast Monthly - New Acct	0	0	0	0	0
82300 - FOOD	Forecast Total - New Acct	0	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.




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.



b. Select displayed desired combo and click  to save data you entered in previous chartfield combination.

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

- 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 [Add](#) to start budgeting.

- i. If this combo is new and does not have any budget. Click [Add Non-Personnel Expense](#) 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

Budget Category	Drill	Actual 2024	Actual July YTD FY2025	Budget 2025	% Through Budget	Previous Forecast	Proposed Forecast	July Actual	August Forecast	September Forecast	October Forecast	November Forecast	December Forecast	January Forecast	February Forecast	March Forecast	April Forecast	May Forecast	June Forecast	Variance \$ Base	Variance % Base	
Total Revenue					0.0%																	
Personnel Expense		1,719,436	87,901	1,802,219	56.0%		1,792,544	87,901	297,159	138,112	138,112	138,112	138,112	297,159	138,112	138,112	138,112	138,112	138,112	138,112	138,112	138,112
Total Personnel Expense		1,719,436	87,901	1,802,219	56.0%		1,792,544	87,901	297,159	138,112	138,112	138,112	138,112	297,159	138,112	138,112	138,112	138,112	138,112	138,112	138,112	138,112
Non-Personnel Expense																						
Total Non-Personnel Expense		138,819	448	228,154	2.4%		206,832	448	39,187	3,675	8,882	40,030	1,964	18,224	11,298	11,883	23,695	14,549	22,874	14,549	22,874	
Total Expenses		1,858,255	88,349	2,030,373	32.4%		2,000,136	88,349	336,346	141,787	146,994	178,142	140,076	315,383	149,410	150,005	161,807	152,761	152,761	152,761	152,761	152,761
Net Operating Result		(1,858,255)	(88,349)	(2,030,373)	87.6%		(2,000,136)	(88,349)	(336,346)	(141,787)	(146,994)	(178,142)	(140,076)	(315,383)	(149,410)	(150,005)	(161,807)	(152,761)	(152,761)	(152,761)	(152,761)	(152,761)

- 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 on the left side of the plan file listing.
 - a. Finding a plan file.
 - i. Use the search function

b. There are a

2. Use the

- 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.

- x 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.
- x 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.
- x Fund – type the fund number or part of the description and a list will be displayed to select the desired fund code.
- x Product – type in characters of the product code and select the appropriate value.
- x Initiative – type in characters of the initiative code and select the appropriate value.
- x Acct – Enter the budget account for the salary plan of the position.

- b. Make sure to verify that the distribution equals 100%

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

- 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."



3) Other Labor Accounts

Dept	Fund	Product	Initiative	Opunit	Acct	Description	Actual	Original Budget	Adjusted Budget	July 2024	August 2024
							2024	2025	2025	Actual	Forecast
026100	04351	SAP006	0000000	TPA	88028	OTHER SALARY	0	270,384	270,384		0.76

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

Calc Method Variables ✕

Dept
 ✕

Opunit
 ✕

Fund
 ✕

Product
 ✕

Initiative
 ✕

Acct
 ✕

- 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