Bulls Budget System

Salary Category Detail (SCD) Guide

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

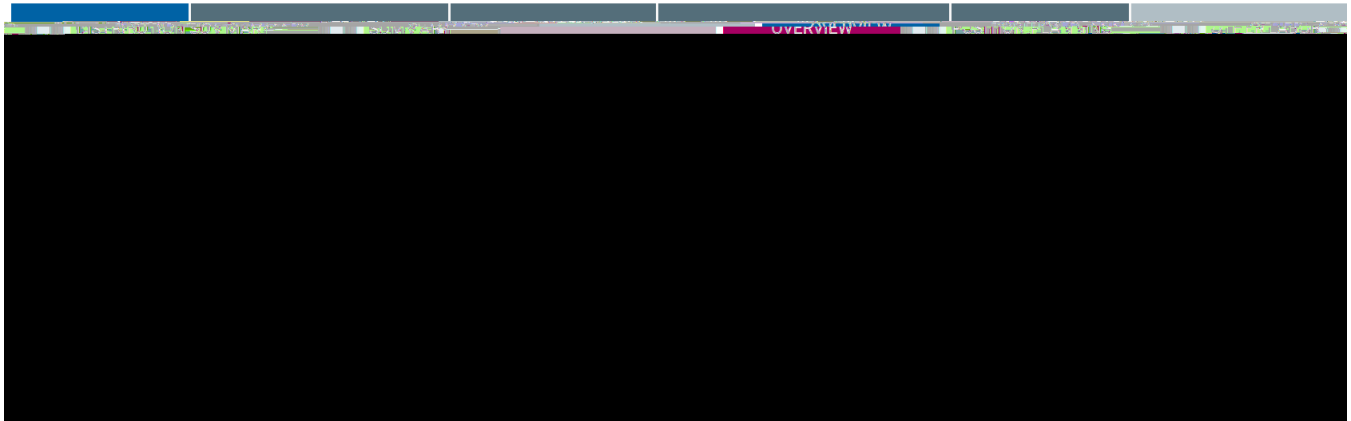s b7 (o)-9.6 (r)-2x9 (h)10.6 (L)-7d8 (e)-6.2 (n)-0.3 (t)-p8 (y)-7l2 (n)-08 (n)-0.5 (

LABOR PLANNING - SCD

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

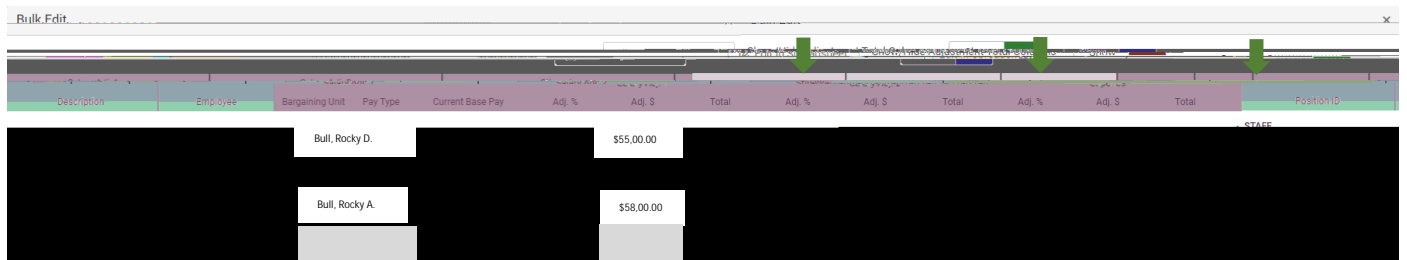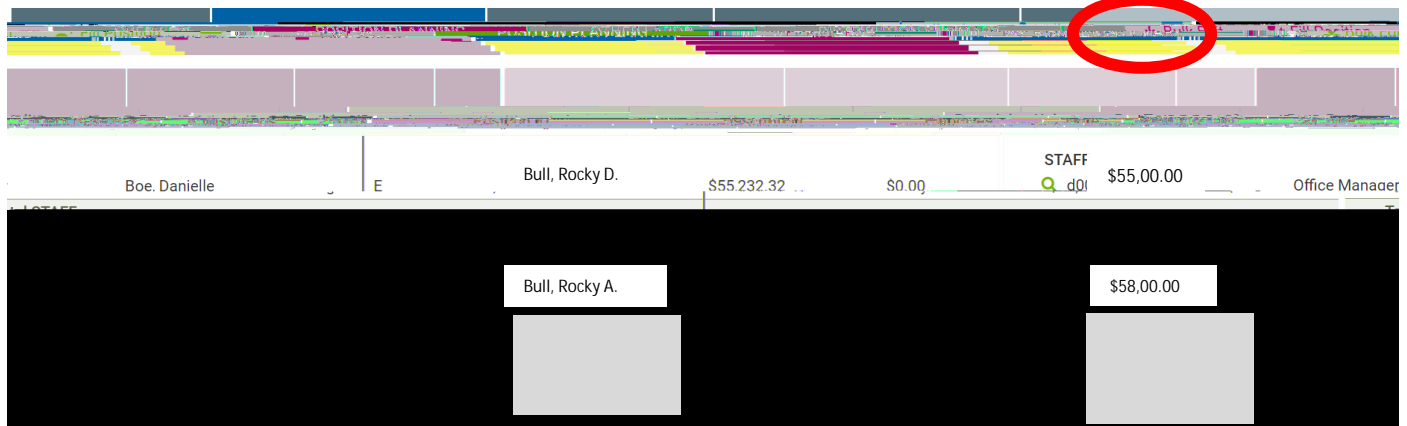2) The plan file will open in a new tab and open to the overview page.

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.

| Boe, Danielle | E | Bull, Rocky D. | $55,232.32 | $0.00 | d0 | $55,00.00 | Office Manager |

| | | Bull, Rocky A. | | | | $58,00.00 | |

Bulk Edit

Description	Employee	Bargaining Unit	Pay Type	Current Base Pay	Adj. %	Adj. $	Total	Adj. %	Adj. $	Total	Adj. %	Adj. $	Total	Position ID
	Bull, Rocky D.					$55,00.00								
	Bull, Rocky A.					$58,00.00								

    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

    i. Another Option is to   . Clicking this button will put the data in 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.

- 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   column (last column before Comment)

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.

*The funnel can be used on both reports to view the data based on the selected criteria.