



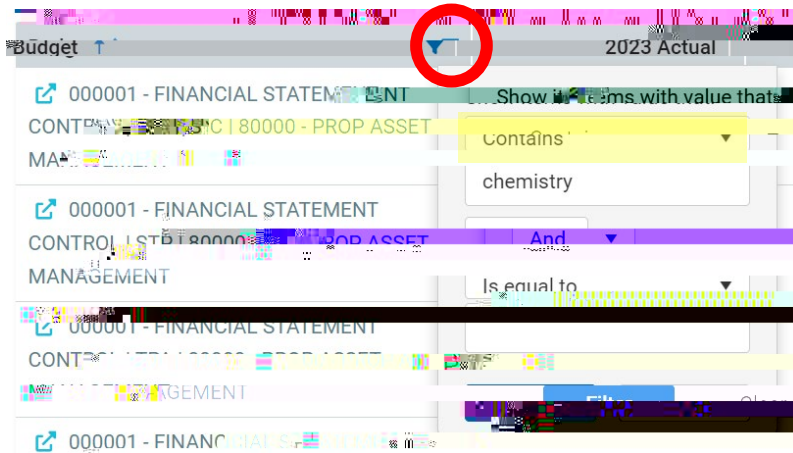


# BUDGETING

The BBSink opens to the budget planning process. The plan files are listed with three character plan file names (xxxxxx- DeptName|OU|xxxxxx- FundDescription).

- 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 descriptions. 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					
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 Lab & Equipment Contingency					
121300 - CHEMISTRY   TPA   01041 - CAS FAC. III					
121300 - CHEMISTRY   TPA   01060 - CAS					
121300 - CHEMISTRY   TPA   10000 - GENERAL REVENUE CARRY FORWARD	\$398,386	\$351,096	\$100,567	\$250,529	71.4%
121300 - CHEMISTRY   TPA   11500 - TUITION DIFFERENTIAL	\$853,196	\$856,230	\$499,070	\$357,160	41.7%

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



2) The plan file will open in a new tab and open 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
  - 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 \$	2025	Spread
+ Insert Budget Group							
Total Revenues	0	0	0			0	
Personnel Expense							
Personnel Expense		1,266,988	1,265,343			940,265	
+ Insert Budget Group							
Total Personnel Expense		1,188,218					
Non-Personnel Expense							
Non-Personnel Expense	73,070	25,000	17,390			24,894	
Q 88100 - TRAVEL	14,838	5,000					
Q 88250 - CONTRACTUAL SERVICES							
Q 88400 - COMPUTER RELATED - MATERIALS	4,397	12,000				0	2,000
Q 88420 - MATERIAL, SUPPLIES & EQUIP OTH	11,523	2,000	2,000			0	2,000



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.

- e. The next four columns are not being used Budget Commitments, Budget Requests One, 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

h.





# LABOR PLANNING

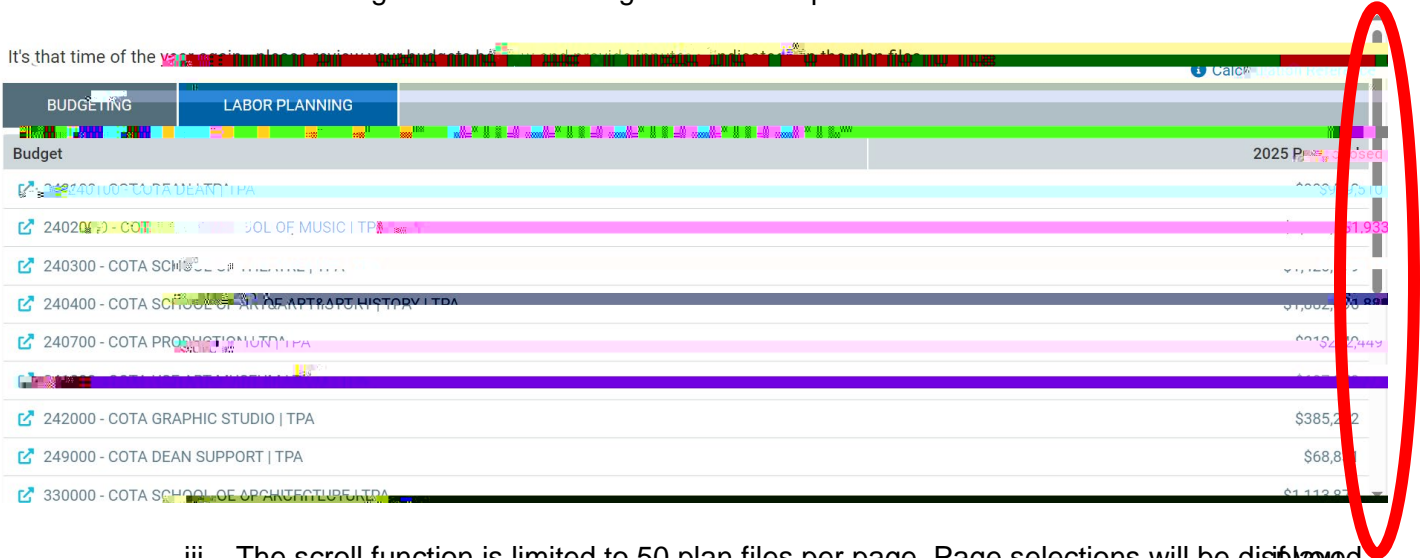
BBS opens to the budget planning process. To access Labor plan files, click on the “LABOR PLANNING” box on the blue menu line.



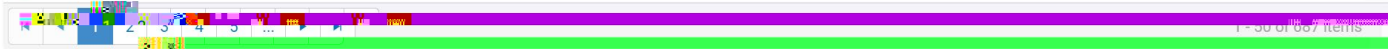
- 1) Opening a Labplan files is done by clicking the file open icon on the left side of the plan file listing.
  - a. Finding a plan file.
    - i. Use the search function (cursor must be in Budget box above plan file list) to find any portion of alphanumeric characters in the plan file description.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



- 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. Page selections will be displayed. Users have access to more than 50 plan files.






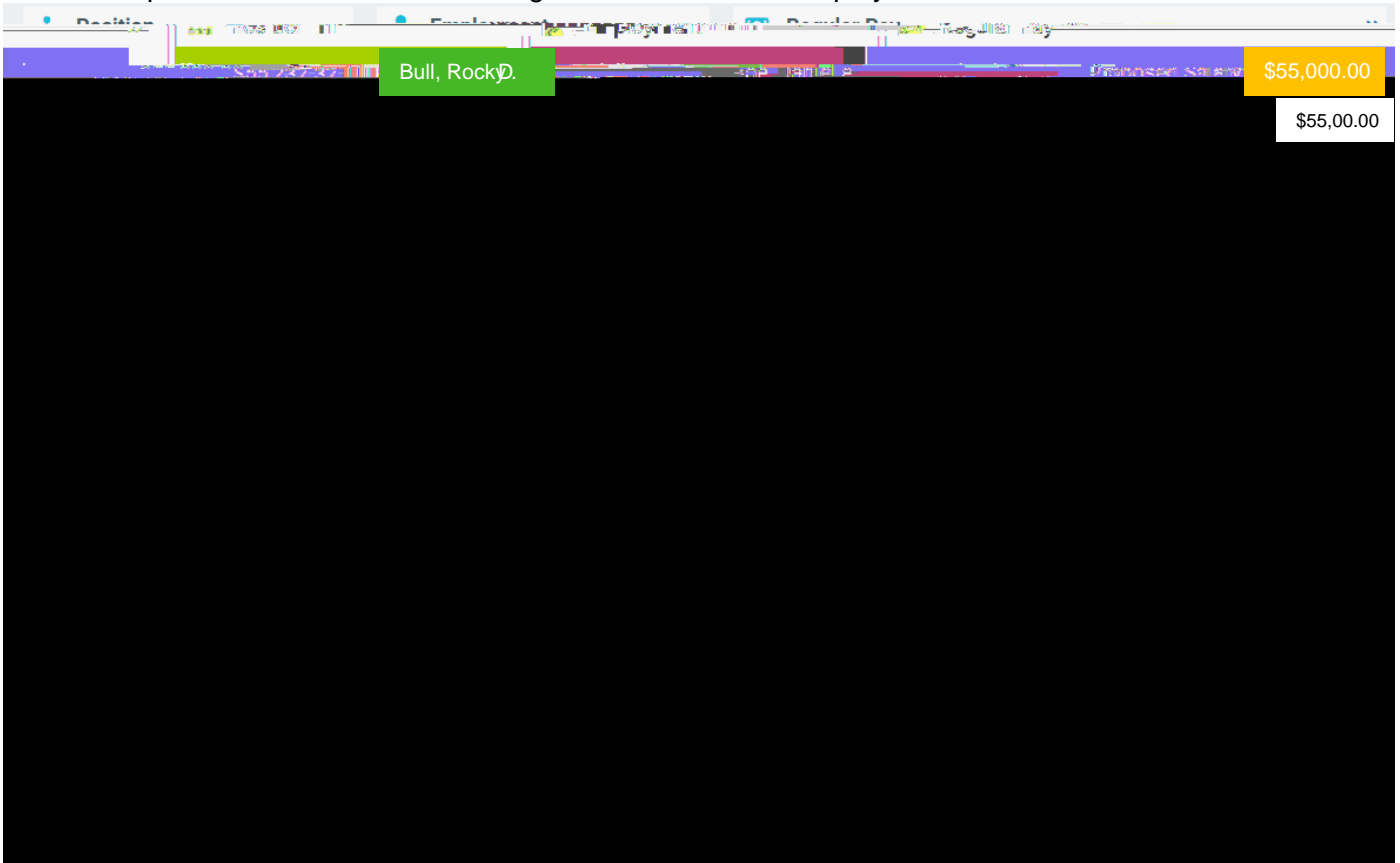
c. Stipends are listed in the third section

Stipends		
Adj. %	Adj. \$	Total

[Edit In Spreadsheet](#)


- 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  100016957 magnifying glass next to the desired position number. The following information will be displayed.



- 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 [tousfin-BFA@usf.edu](mailto:tousfin-BFA@usf.edu)
- iii. Regular Pay (yellow header) do not put 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 decimal values (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 pepp to enter the chartfield combination required for

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

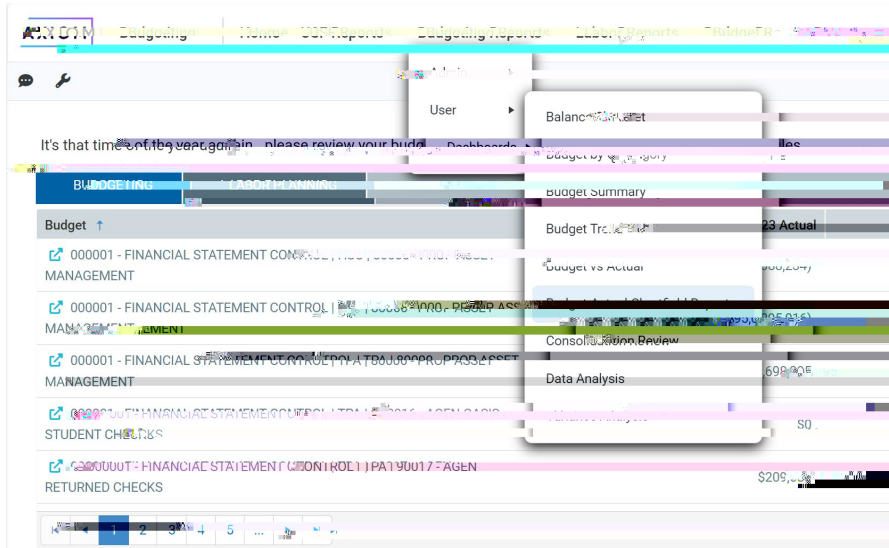
- i. Use the drop downs to fill each field (when available).
  - ii. Position– type the desired position number or part of the position and a reduced list will display. A portion of the position description can also be entered to get a list. A position needs to be selected to complete the rest of the 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 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 –



a.





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