Web-Based Budget User Guide

University of South Carolina
South Carolina's Flagship University

BUDGET OFFICE
South Carolina

BUDGET OFFICE HOME

Web-based Budget Web System

Please enter your network username and password.

Username:

Password:

Login

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System Access   https://webapps.uts.sc.edu/budgetdev/

The web-based budget system can also be accessed through the Budget Office website on the Financial Systems page. The unit business officer is responsible for entering all budget changes. If additional access is needed, please contact Kara Law (lawkh@mailbox.sc.edu).

Required Action

Each unit must review and submit a balanced budget for the following fiscal year. If the unit does not wish to make changes to the current budget, the 'Manage' box will be checked on the main page.

Suggested Action

During the budget development process units should make changes to the current budget that reflect their plan for the following fiscal year to include:
- Changes in personnel and fringe expense
- Updating recurring revenues and expenditures to reflect future estimates
- Adding new accounts or departments where needed

Budget Guidelines

Use the following guidelines to ensure a properly balanced budget:
- Prepare budget according to the legacy budget model, especially as it relates to tuition. The Budget Office will make conversions necessary for the new budget model.
- Balancing:
  - A funds must be balanced by department, fund, and project for all Columbia units. Budgeted changes in fund balance are not permitted.
  - Restricted fund budgets must be balanced by fund for all units system-wide. Budgeted changes in fund balance are not permitted.
  - Non-A Unrestricted funds (B,C,D,E,N,R,SU) are permitted to budget a change in fund balance.
    - Increase fund balance with negative 31000 ($X)
    - Decrease fund balance with positive 31000 +$X
  - Non-A funds can be budgeted at the Operating Unit level (i.e. BUD000-E9999) or separated into specific department funds. See appendix 1 on creating a new department fund.
- Expenses:
  - Correct any negative expense budgets (5XXXX).
  - If your unit has actual IDC expense (59990), ensure that 59990 is budgeted for FY2021 Restricted funds. This account will be used for determining the Indirect Cost Recover (IDC) Revenue when converting from Legacy to New Budget Model format.
- Transfers:
  - Budgeted transfers are permitted within an operating unit only. Budget transfers cannot be made between operating units during budget development.
  - Interdepartmental transfers (36400/36500, 37400/37500) should net to zero at the unit level.

1. Log in to the web-based system using your USC network username and password.

2. The first page will present a list of operating units for which you have access. Click on the pencil icon to view the existing budget and make changes.

3. You will see a list of departments and funds that had active budgets as of the freeze date for all current funds. Click the department name to view current budget and make changes.

Note: Departments can be filtered by individual fund (A0001) or fund type (all E funds).

Note: Budgets listed in department BUD000 are fund type level budgets. You may adjust the central budget (i.e. E9999) or budget by specific department funds.

See Appendix 1 for creating a new department.

4. The current budget will be displayed. Enter changes into the 'Unit Changes' column and 'Requested Budget' values will calculate.

   See Appendix 2 for adding a new account code.

   Note: Use whole dollars only with no commas or dollar signs.

Optional: Click on the book icon to add comments. The icon will turn red once comments are saved 📕 .

5. Ensure department is balanced by using the green 'Grand Total' bar at the bottom of your screen.

Note: All Columbia unit budgets must balance by department. System institution budgets are not required to balance by department; however, the budget must balance at the operating unit level.

Note: If you attempt to navigate back to the Department Fund List without balancing you will receive the following warning.

webapps.uts.sc.edu says

Your Requested Budget is not balanced.
Click OK to update the balance or click Cancel to proceed to the Operating Unit List.

OK   Cancel

6. After all desired changes have been entered, review the department fund list to ensure all departments are balanced. A fund budgets must also be balanced at the project level for all Columbia units.

7. Review any warning labels in the 'Balance' column and make corrections as needed.

Note: System institution budgets are not required to balance at the department level. A blue exclamation point will be present when submitting the final budget for system intuitions only.

8. Export a copy of the completed budget for your records.

9. To submit your final budget, select the 'Manage' box from the Operating Unit Listing page. This action will notify the Budget Office that your budget is ready for review and cannot be undone.

Appendix 1: Adding a department, fund, or project

- Select 'Add New Dept/Fund/Project' box

- Enter all required information into the form and click Save.

Notes:
- o 'Dept/Fund Code' will be six digits followed by five alphanumeric characters with no spaces.
- o You may select multiple resource and expense codes. Use the 'X' to remove unwanted codes.

Appendix 2: Adding an account code

- Select 'Add Resource/Expense Account Code' box

- Select account code(s) to add and click Save.