

Web-Based Budget User Guide



Web-based Budget Web System

Please enter your network username and password.

Username:

Password:

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.

BUDGET OFFICE

South Carolina's Flagship University

BUDGET OFFICE HOME

Web-based Budget Web System

Please enter your network username and password.



Username:

Password:

USC LINKS: DIRECTORY MAP EVENTS VIP

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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.















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LOGOUT


Operating Unit Listing

 Update the Operating Unit	 Operating Unit is locked	 Export Budget
 Account Codes 37400 and 37500 are not balanced	 Resources and Expenses are not balanced	 Account Codes 36400 and 36500 are not balanced
 Project Accounts are not balanced	 Operating Unit is balanced	<input checked="" type="checkbox"/> Check the box under the Manage header when ready to submit


OU	Operating Unit	Business Officer	Balance	Manage	Reviewed
AK000	Aiken	Cam Reagin		 	<input type="checkbox"/>



- 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.



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[OPERATING UNIT LIST](#)
[LOGOUT](#)

Operating Unit Code - AK000 - Aiken


Filter by: and/or Type:

Click on the pencil or Department to view the budget for each account.


Dept #	Fund #	Department	Add New Dept/Fund/Project	Resources	Expenses	Balance	Manage
911000	A0001	AK PALMETTO COLLEGE		572,630	709,654	-137,024	
911030	A0001	AK DEPT OF EXERCISE SCIENCE		0	533,675	-533,675	
911031	A0001	AK SCHOOL OF EDUCATION		0	1,444,095	-1,444,095	
911032	A0001	AK SCHOOL OF BUSINESS		0	2,384,552	-2,384,552	
911035	A0001	AK SCHOOL OF NURSING		0	1,773,952	-1,773,952	
911041	A0001	AK DEPT OF ENGLISH		0	1,302,608	-1,302,608	



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



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South Carolina's Flagship University

[OPERATING UNIT LIST](#)
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Operating Unit Code - AK000 - Aiken

Filter by: and/or Type:

Click on the pencil or Department to view the budget for each account.

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911032	A0001	AK SCHOOL OF BUSINESS		0	2,384,552	-2,384,552	
911035	A0001	AK SCHOOL OF NURSING		0	1,773,952	-1,773,952	
911041	A0001	AK DEPT OF ENGLISH		0	1,302,608	-1,302,608	




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.

- 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.



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Operating Unit Code - AK000 - Aiken

AK PALMETTO COLLEGE

OPERATING UNIT LIST

DEPARTMENT FUND LIST

LOGOUT

Click on the Office Adjmts values to view details of each record.

Dept #	Fund #	Project	Activity	Activity Description	Category	Account	Account Title	11/30/2019	Budget Ofc Adjmts	Proposed Base	Unit Changes	Requested Budget	Comments
911000	A0001				Resources	81109	TRF FR OTHER CAMPUS E&G UCF (A)	572,630	0	572,630	0	572,630	
Add Resources Account Code					Resources Total			572,630	0	572,630	0	572,630	
911000	A0001				Expenses	51200	CLASSIFIED POSITIONS	126,917	0	126,917	5	126,922	
911000	A0001				Expenses	51300	UNCLASSIFIED ADMINISTRATIVE PE	323,074	0	323,074	0	323,074	
911000	A0001				Expenses	51600	TEMPORARY EMPLOYEES	52,000	0	52,000	0	52,000	
911000	A0001				Expenses	51800	FACULTY STAFF AWARDS	3,222	0	3,222	0	3,222	
911000	A0001				Expenses	51900	FRINGE BENEFITS	199,436	0	199,436	0	199,436	
911000	A0001				Expenses	52024	USC EMPLOYEE TRAVEL DOMESTIC	2,500	0	2,500	0	2,500	
911000	A0001				Expenses	52070	CONTRACTUAL SERVICES	1,000	0	1,000	0	1,000	
911000	A0001				Expenses	53009	OTHER SUPPLIES	1,500	0	1,500	0	1,500	
Add Expenses Account Code					Expenses Total			709,649	0	709,649	5	709,654	
Dept/Fund Project Total								-137,019	0	-137,019	-5	-137,024	
911000	A0001				RESOURCES Total			572,630	0	572,630	0	572,630	
911000	A0001				EXPENSES Total			709,649	0	709,649	5	709,654	
Grand Total								-137,019	0	-137,019	-5	-137,024	

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



BUDGET OFFICE

South Carolina's Flagship University

Operating Unit Code - AK000 - Aiken

AK PALMETTO COLLEGE

OPERATING UNIT LIST

DEPARTMENT FUND LIST

LOGOUT

Click on the Office Adjmts values to view details of each record.

Dept #	Fund #	Project	Activity	Activity Description	Category	Account	Account Title	11/30/2019	Budget Ofc Adjmts	Proposed Base	Unit Changes	Requested Budget	Comments
911000	A0001				Resources	81109	TRF FR OTHER CAMPUS E&G UCF (A)	572,630	0	572,630	0	572,630	
Add Resources Account Code					Resources Total			572,630	0	572,630	0	572,630	
911000	A0001				Expenses	51200	CLASSIFIED POSITIONS	126,917	0	126,917	5	126,922	
911000	A0001				Expenses	51300	UNCLASSIFIED ADMINISTRATIVE PE	323,074	0	323,074	0	323,074	
911000	A0001				Expenses	51600	TEMPORARY EMPLOYEES	52,000	0	52,000	0	52,000	
911000	A0001				Expenses	51800	FACULTY STAFF AWARDS	3,222	0	3,222	0	3,222	
911000	A0001				Expenses	51900	FRINGE BENEFITS	199,436	0	199,436	0	199,436	
911000	A0001				Expenses	52024	USC EMPLOYEE TRAVEL DOMESTIC	2,500	0	2,500	0	2,500	
911000	A0001				Expenses	52070	CONTRACTUAL SERVICES	1,000	0	1,000	0	1,000	
911000	A0001				Expenses	53009	OTHER SUPPLIES	1,500	0	1,500	0	1,500	
Add Expenses Account Code					Expenses Total			709,649	0	709,649	5	709,654	
Dept/Fund Project Total								-137,019	0	-137,019	-5	-137,024	
911000	A0001				RESOURCES Total			572,630	0	572,630	0	572,630	
911000	A0001				EXPENSES Total			709,649	0	709,649	5	709,654	
Grand Total								-137,019	0	-137,019	-5	-137,024	

USC LINKS:

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January 2020

- 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.



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Operating Unit Code - CL000 - General Fund
BAD DEBT EXPENSE

Click on the Office Adjmts values to view details of each record.

Dept #	Fund #	Project	Activity	Activity Description	Category	Account	Account Title	11/30/2019	Budget Ofc Adjmts	Proposed Base	Unit Changes	Requested Budget	Comments
620372	A0001				Resources	31900	COLUMBIA UNIT BASE BUDGET	400,000	0	400,000	0	400,000	
					Resources Total			400,000	0	400,000	0	400,000	
620372	A0001				Expenses	54199	OTHER FIXED CHG BAD DEBT EXPEN	400,000	0	400,000	0	400,000	
					Expenses Total			400,000	0	400,000	0	400,000	
					Dept/Fund Project Total			0	0	0	0	0	
620372	A0001				RESOURCES Total			400,000	0	400,000	0	400,000	
					EXPENSES Total			400,000	0	400,000	0	400,000	
					Grand Total			0	0	0	0	0	



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

- 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.



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Operating Unit Code - CL000 - General Fund

Filter by:

All Funds

and/or Type:

All Types

Submit

Resources

Expenses

Balance

Manage

010000	A0000	USC General Ledger	5,918,880	5,918,880	0	
620301	A0001	RETURNED CHECK RECEIVABLES	100,000	100,000	0	
620305	A0001	BANK CARD CHARGES	0	0	0	
620366	A0001	CR CARD CONVENIENCE FEE	1,000,000	1,000,000	0	
620372	A0001	BAD DEBT EXPENSE	400,000	400,000	0	
800002	A0001	GENERAL FUND FEE ABATEMENTS -	110,400,000	110,400,000	0	
800003	A0001	GENERAL FUND IDC REMIT TO STAT	1,000,000	1,000,000	0	
800005	A0001	GEN FND FEE ABATEMENTS-PROG 20	10,600,000	10,600,000	0	
800006	A0001	GEN FND FEE ABATEMENTS-PROG 10	9,000,000	9,000,000	0	
BUD000	E9999	BUDGET	2,609,511	2,609,511	0	
Totals:			141,028,391	141,028,391	0	

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



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LOGOUT



Operating Unit Listing

	Update the Operating Unit		Operating Unit is locked		Export Budget
	Account Codes 37400 and 37500 are not balanced		Resources and Expenses are not balanced		Account Codes 36400 and 36500 are not balanced
	Project Accounts are not balanced		Operating Unit is balanced	<input checked="" type="checkbox"/>	Check the box under the Manage header when ready to submit

OU	Operating Unit	Business Officer	Balance	Manage	Reviewed
AK000	Aiken	Cam Reagin		<input type="checkbox"/>	<input type="checkbox"/>

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.

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










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South Carolina's Flagship University

LOGOUT



Operating Unit Listing

 Update the Operating Unit	 Operating Unit is locked	 Export Budget
 Account Codes 37400 and 37500 are not balanced	 Resources and Expenses are not balanced	 Account Codes 36400 and 36500 are not balanced
 Project Accounts are not balanced	 Operating Unit is balanced	 Check the box under the Manage header when ready to submit

OU	Operating Unit	Business Officer	Balance	Manage	Reviewed
AK000	Aiken	Cam Reagin		 <input type="checkbox"/> 	<input type="checkbox"/>



- 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.










BUDGET OFFICE




South Carolina


South Carolina's Flagship University

LOGOUT

Operating Unit Listing

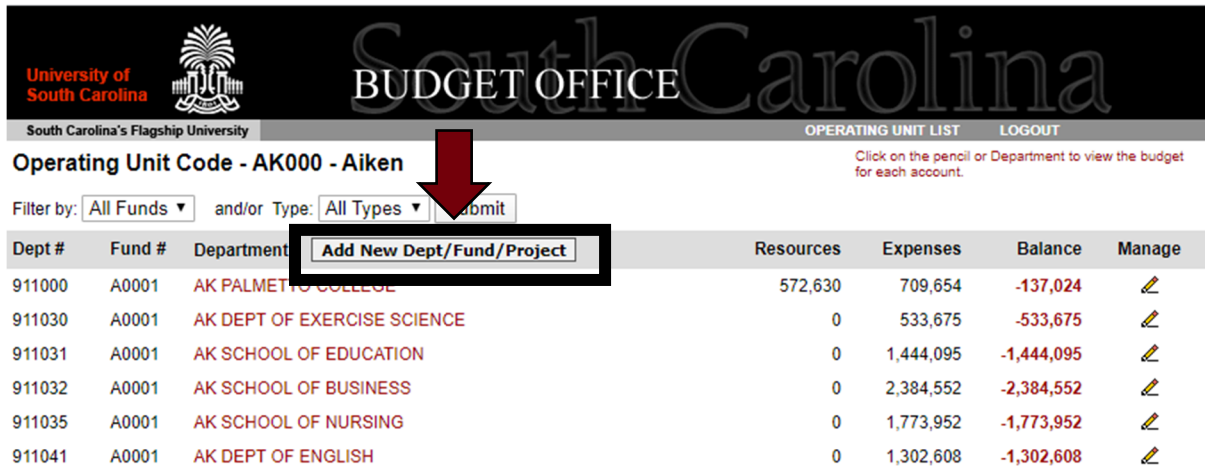
 Update the Operating Unit	 Operating Unit is locked	 Export Budget
 Account Codes 37400 and 37500 are not balanced	 Resources and Expenses are not balanced	 Account Codes 36400 and 36500 are not balanced
 Project Accounts are not balanced	 Operating Unit is balanced	 Check the box under the Manage header when ready to submit

OU	Operating Unit	Business Officer	Balance	Manage	Reviewed
AK000	Aiken	Cam Reagin		 <input type="checkbox"/> 	<input type="checkbox"/>



Appendix 1: Adding a department, fund, or project

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



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BUDGET OFFICE

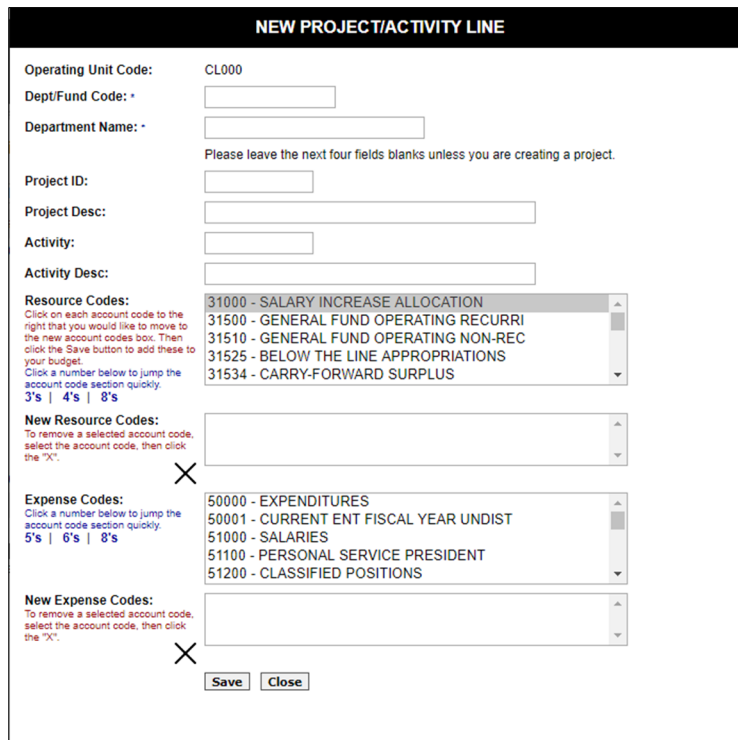
Operating Unit Code - AK000 - Aiken

Filter by: and/or Type:

Click on the pencil or Department to view the budget for each account.

Dept #	Fund #	Department	Resources	Expenses	Balance	Manage
911000	A0001	AK PALMETTO COLLEGE	572,630	709,654	-137,024	
911030	A0001	AK DEPT OF EXERCISE SCIENCE	0	533,675	-533,675	
911031	A0001	AK SCHOOL OF EDUCATION	0	1,444,095	-1,444,095	
911032	A0001	AK SCHOOL OF BUSINESS	0	2,384,552	-2,384,552	
911035	A0001	AK SCHOOL OF NURSING	0	1,773,952	-1,773,952	
911041	A0001	AK DEPT OF ENGLISH	0	1,302,608	-1,302,608	

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



NEW PROJECT/ACTIVITY LINE

Operating Unit Code: CL000

Dept/Fund Code:

Department Name:

Please leave the next four fields blanks unless you are creating a project.

Project ID:

Project Desc:

Activity:

Activity Desc:

Resource Codes:

Click on each account code to the right that you would like to move to the new account codes box. Then click the Save button to add these to your budget. Click a number below to jump the account code section quickly. 3's | 4's | 8's

31000 - SALARY INCREASE ALLOCATION
31500 - GENERAL FUND OPERATING RECURRI
31510 - GENERAL FUND OPERATING NON-REC
31525 - BELOW THE LINE APPROPRIATIONS
31534 - CARRY-FORWARD SURPLUS

New Resource Codes:

To remove a selected account code, select the account code, then click the "X".

Expense Codes:

Click a number below to jump the account code section quickly. 5's | 6's | 8's

50000 - EXPENDITURES
50001 - CURRENT ENT FISCAL YEAR UNDIST
51000 - SALARIES
51100 - PERSONAL SERVICE PRESIDENT
51200 - CLASSIFIED POSITIONS

New Expense Codes:

To remove a selected account code, select the account code, then click the "X".

Notes:

- 'Dept/Fund Code' will be six digits followed by five alphanumeric characters with no spaces.
- 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

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South Carolina's Flagship University

Operating Unit Code - CL000 - General Fund
BAD DEBT EXPENSE

Click on the Office Adjmts values to view details of each record.

Dept #	Fund #	Project	Activity	Activity Description	Category	Account	Account Title	11/30/2019	Budget Ofc Adjmts	Proposed Base	Unit Changes	Requested Budget	Comments
620372	A0001				Resources	31900	COLUMBIA UNIT BASE BUDGET	400,000	0	400,000	0	400,000	[X]
					Resources Total			400,000	0	400,000	0	400,000	
620372	A0001				Expenses	54199	OTHER FIXED CHG BAD DEBT EXPEN	400,000	0	400,000	0	400,000	[X]
					Expenses Total			400,000	0	400,000	0	400,000	
				Dept/Fund Project Total				0	0	0	0	0	
620372	A0001				RESOURCES Total			400,000	0	400,000	0	400,000	
620372	A0001				EXPENSES Total			400,000	0	400,000	0	400,000	
				Grand Total				0	0	0	0	0	

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

NEW ACCOUNT CODE

Dept Fund: 620372A0001

Category: Resources

Project ID:

Activity:

Account Codes:
Click on each account code to the right that you would like to move to the new account codes box. Then click the Save button to add these to your budget.
Click a number below to jump the account code section quickly.
3's | 4's | 8's

31000 - SALARY INCREASE ALLOCATION
31500 - GENERAL FUND OPERATING RECURRI
31510 - GENERAL FUND OPERATING NON-REC
31525 - BELOW THE LINE APPROPRIATIONS
31534 - CARRY-FORWARD SURPLUS
31535 - REVENUE SHORTFALL BUDGET TO AC
31600 - BOARD OF TRUSTEES RECURRING AL
31900 - COLUMBIA UNIT BASE BUDGET

New Account Codes:
To remove a selected account code, select the account code, then click the "X".

X

Save Close