Axiom User Manual





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Initial Log-in

The browsers that should be used to access Axiom are listed below.

Platform	Supported Browsers	
PC	Microsoft Edge, the most current and previous major versions	
	 Google Chrome, the most current and previous major versions 	
	 Mozilla Firefox, the most current and previous major versions 	
Mac	Apple Safari, the most current and previous major versions	
Nobile acc he following re	ess requirements quirements apply when accessing the Web Client on a mobile device:	
Aobile acco The following re Platform	ess requirements quirements apply when accessing the Web Client on a mobile device:	
Nobile acco he following re Platform iPad	ess requirements quirements apply when accessing the Web Client on a mobile device: Eupported Erowson Apple Safari for iOS, the most current and previous major versions	

Web Link

To log into the Axiom production system, use this link:

https://udel.axiom.cloud/

Home Screen Navigation

Logging in through CAS, will bring you to the home screen.

Budgeting		III a 🗘 💀
≡ ∞ ۶		
Welcome Doug Bernart It's that time of the year againplease review your budgets below	v and provide inputs as indicated in the plan files.	
Support Materials	Announcements	+ Budgeting Process Summary
Kaufman Hall UD Budget Office		16 _{Total}
		16 New d00106 (TITLE IX OFFICE) d00106 (VP STRATEGIC PLAN & ANALYSIS)
Budgeting		
		Budgeting
Welcome Douglas Bernart It's that time of the year againplease review your budgets below and prov	ide inputs as indicated in the plan files.	C Capital Planning
Support Materials	Announcements +	Labor Planning Process
Kaufman Hall UD Budget Office		O Total
		0 New
		0 Due Soon
		0 Overdue
C OFC OF EXEC VICE PRESIDENT OFFIC	CE OF EXEC V/P & UNIV TREA 00160	O College / Unit Input

If you get "lost" in Axiom and want to get back to the home page, here are two ways to do so:

1. Click the "waffle" on the right side of the Navigation bar and select **Budgeting**.

2. or click on the "hamburger" on the upper left side of the screen and select **Home**.

Budgeting		
🔁 🗢 🗡		
Navigation +		
> 🛨 Favorites	w your budgets below and provide inputs as indicated in the plan files.	
> Ø Recent Places	Announcements +	Labor Planning Process
Home		
Balance Sheet		0 New
Budget vs Actual		0 Due Soon
CONTROL Dataset Comparison		0 Overdue
Dataset Comparison		
Fund Type	G	
Revised Dataset Comparison (Single Non C		

On the home screen, you may see **Announcements** from the Budget Office in the upper center part of the screen. You will also see a **Process Summary** in the upper right section of the screen. The Process Summary shows the plan files that are currently awaiting action by the user (discussed in more detail later in this document). You will see a "**Budgeting Process Summary**" when on the Budgeting tab and a "**Labor Planning Process Summary**" when you are on the Labor Planning tab.

Budgeting		
≡ ୭ ⊁		
Welcome Dee Smith It's that time of the year againplease review your budgets below and provide inputs as indicated	n the plan files.	
Support Materials	Announcements	Budgeting Process Summary
Kaufman Hall UD Budget Office		70 _{Total}
		70 Network en province (Justin & Schemachia) entropia (Justin & Schemachia) entropia (Justin & Schemachia) entropia (Justin & Schemachia) entropia (Justin Schemachia) entropia (Jus

From the home screen, the **Budgeting** and **Labor Planning** plan files are accessible by first selecting the appropriate tab:

P									
Welcome Doug Bernart It's that time of the year againplease review your bu	dgets below and provide inputs as indicated in	the plan files.							
Support Materials	Announcements							+	Labor Planning Proces
Kaufman Hall UD Budget Office									3 New d00106 (TITLE IX OFFICE) d00680 (OFFICE OF EQUITY AND
BUDGETING LABOR PLANNING					Step				
Dept Level 4	Dept	Dept ID	1	2	3	4	5	Status	
OFC OF THE PRESIDENT	OFC OF THE PRESIDENT	00101						Labor Pl	lan Completed
VICE PRES & GENERAL COUNSEL	VP & GENERAL COUNSEL	00103						O College	/ Unit Labor Input
		00104	1.000	-		-		0.0.1	211 A.1.1. A

There are typically two plan files for each Dept; one under **Labor Planning** and one under **Budgeting**:

- Labor Planning plan files
 - Include benefitted position information as well as pooled salary positions (e.g. S-contract, grad stipend, misc wage, overtime, etc.)
 - It is recommended that the user finalize working on Labor Planning before Budgeting because data saved in the Labor Plan files will transmit (at a summary level) to the appropriate Budgeting Plan files.
- **Budgeting** plan files
 - Used for budgeting revenue and non-compensation budgeting (expenses & transfers) at a "by DeptID, by Purpose Code, by Account" level.

Note: The list of plan files on the home page (from the center to the bottom of the page) may contain plan files that the user is not actually responsible for budgeting. Reasons for these appearing include "view all" access in PeopleSoft security, other PeopleSoft security settings, or salaries shared to/from other colleges/units.

The user should focus primarily on the Process Summary list on the upper right corner of the home page to determine which plan files require action. The Process Summary list is discussed in more detail later in this document.

The user has access to only those plan files that are within their college/unit and align with their PeopleSoft security settings. If you do not have access to a particular plan file, you will receive an error message similar to the below when trying to open the plan file. Click OK.

Error	×
You do not have Read access to document 'Labor Planning 2021_d00101.xlsx'	
	ок

Column Headers - To help you navigate through the plan file list, you can sort the various columns by clicking on the column headers (circled below). You can also use the web browser find function (usually CTRL-F) to search for specific text or number.

BUDGETING LABOR PLANNING								
					Step			
College or Admin Unit	Dept	Dept ID	1	2	3	4	5	Status
C UNIVERSITY HONORS COLLEGE	UNIV HONORS COLLEGE	01240	8					O College / Unit Input
C DEPUTY PROVOST	UNIVERSITY STUDIES	01245						O College / Unit Input
C DEPUTY PROVOST	UNDERGRAD RESEARCH PROGRAM	01253						O College / Unit Input
C UNIVERSITY LIBRARY	LIBRARY	01301						O College / Unit Input
I ARTS & SCIENCES	ENGLISH LANGUAGE INSTITUTE	01470						O College / Unit Input
C DEPUTY PROVOST	OFC INTERNATL STU & SCHOLARS	01475	-		-			O College / Unit Input
GRADUATE COLLEGE	GRADUATE AND PROFESSIONAL EDUC	01501						O College / Unit Input
C DEPUTY PROVOST	DEPUTY PROVOST ACAD AFFAIRS	01520	8					O College / Unit Input

Workflow Steps – The Workflow Steps are the columns on the home page labeled Step 1, Step 2, etc. Workflow Steps provide color-coded status information on the plan files as they move through the workflow process.

- Step 1 (cyan) "Dept Input" This is where some Colleges/Units can first enter their detailed budget submission. This step is currently employed on a limited basis where there is a significant need to start budget input at a level lower than College/Unit (i.e. different people handling various DeptID's under one College/Unit.)
- Step 2 (purple) "College/Unit Input" is the initial starting point for most plan files. This is where Colleges & Units enter their detailed budget submission. Plan files in this stage can either be approved or returned to Step 1, if applicable.
- Step 3 (orange) "College/Unit Approval" is the Dean/VP review stage. Plan files in this stage can either be approved or returned to Step 2 for action.
- Step 4 (yellow) "Budget Office Approval" is the review stage for the central Budget Office. Plan files in this stage can either be approved or returned to Step 3 for action.
- Step 5 (green) "Plan Completed" indicates plan file has been approved by the central Budget Office and is considered complete.

		Step			
1	2	3	4	5	Status
					Ocollege / Unit Input
					Ollege / Unit Approval
					Ollege / Unit Input
					Ollege / Unit Input
					Ollege / Unit Input
					Budget Office Approval
					Plan Completed

To open a plan file from the home page, click the blue arrow icon on the left side of the screen.

BUDGETING LABOR PLANNING								
					Step			
College or Admin Unit	Dept	Dept ID 🕇	1	2	3	4	5	Status
BIDEN SCHOOL OF PUBLIC POLICY	ENVIRON'L & ENERGY POLICY PGM	07318						O College / Unit Approval
BIDEN SCHOOL OF PUBLIC POLICY	CTR APPLIED DEMOGRAPY & SURVEY	07325						O College / Unit Approval
C EDUCATION & HUMAN DEVELOPMENT	CTR RSCH EDUC & SOCIAL POLICY	07330						Ollege / Unit Input
BIDEN SCHOOL OF PUBLIC POLICY	CTR COMMUNITY RESEARCH & SERV	07350						O College / Unit Approval
C EDUCATION & HUMAN DEVELOPMENT	CTR FOR DISABILITIES STUDIES	07355						Ollege / Unit Input
BIDEN SCHOOL OF PUBLIC POLICY	CTR FOR HIST ARCH & DESIGN	07360						O College / Unit Approval
BIDEN SCHOOL OF PUBLIC POLICY	HEALTH SVCS POLICY RSCH	07370						O College / Unit Approval
BIDEN SCHOOL OF PUBLIC POLICY	INSTITUTE FOR PUBLIC ADMIN	07380						O College / Unit Approval

Labor Planning

Overview

It is recommended that the user finalize working on Labor Planning before finalizing Budgeting because data saved in the Labor Plan files will transmit (at a summary level) to the appropriate Budgeting Plan files.

Once a labor plan file is opened, the light blue banner at the top will show you the DeptID, the College/Unit, and the DeptID Description:

Budgeting									
≡ 🗞 🗭 🖋									
02510 - ARTS & SCIENCI ANTHROPO	s LOGY Labor Plannin	g							
OVERVIEW	POSITION PLANNING	ROSTER	OTHER LABOR	SUMMARY					

By default, Labor plan files open on the **Position Planning** tab. The other tabs are **Overview**, **Roster**, **Other Labor** and **Summary**:

- **Overview**: intended to provide high level instructions for the users.
- **Position Planning**: detail for both filled & vacant positions. The majority of labor planning occurs here.
- **Roster**: Displays a summary view by position. This is essentially a summarized view of the content on the Position Planning tab.
- **Other Labor**: This tab is where the user enters pooled personnel expense such as S-Contracts, Grad Student Salaries & Overtime.
- **Summary**: Displays an even higher rolled up view, by position category.

Overview

The **Overview** tab provides general instructions for how to complete the plan file.

OVERVIEW	POSITION PLANNING	ROSTER	OTHER LABOR	SUMMARY		
2021 Labor	Planning			Legend		
Hi Doug,				Historical value or calcula	tion (not changeable)	12,345
Thanks for your input	on the labor plan for 2021.					
Process				User input or updateable of	ell	\$1,000
1. Complete the fields	in the Position Planning tab.					
2. Review the results i	n the Roster tab and return to the					
Position Planning tab	to make edits, if necessary.					
Saving						
The system does NOT	save your inputs automatically, so click t	he Save button				
in the upper right corn	er of the page before moving on to anoth	er section or tab.				

Position Planning

The **Position Planning** tab contains sections for each position category as well as a "Shared Positions" section at the bottom of the sheet (if applicable). Shared positions are positions where the home department is not the current plan file, but a portion of the salary distribution is applied to the current plan file. Shared position data cannot be updated in this plan file as the position is managed within another plan file.

7325 - BIDEN SCHOOL OF PUBLIC POL	©Y)GRAPY & SL	JRVEY Labo							
OVERVIEW POSIT	ON PLANNING	ROSTER	OTHER LABOR	SUMMARY					
Position		c	ategory	Employee			July 2020 Budget	August 202 Budget)
T Post Doctoral Research	er								
10008099 - Post Doctoral Researche	r	FT Post Doctoral Resear	rcher	VACANT - 999999999			:	\$0	\$0
rofessional, Full Time 10002653 - Policy Scientist		Professional, Full Time		Racca, David P					
10002787 - Assoc Policy Scientist		Professional, Full Time		Laznik, John M					
10003652 - Asst Policy Scientist		Professional, Full Time		VACANT - 999999999			:	\$0	\$0
10004471 - Assoc Policy Scientist		Professional, Full Time		Gross, Rebecca Anne					
10005341 - Assoc Policy Scientist		Professional, Full Time		Chen, Wei-Ming					
10008397 - Asst Policy Scientist		Professional, Full Time		Brel, Yuliya					
hared Positions									
10001675 - Center Director		Academic Center Direct	or	Ratledge, Edward C					
TOTAL CALADIES							\$44 T	e é4	705

The Labor plan files have One-click expand/collapse functionality. In the far-right corner of the Position Planning tab, you see three triangles:



The first triangle ▲ is the "collapse all" button.

The second triangle \geq is the "mid expand" button, which will expand the position data to Comp Type level (salary and budgeted amount by Comp Type)

The third triangle \forall is the "expand all" button, which will expand down to the distribution (purpose, account, class, benefits, etc.)

Labor plan files default to opening in "collapse all" mode no matter in what state they were previously saved.

For extremely large labor plan files, it could take 1-2 minutes per "triangle click".

By default, the **Position Planning** tab shows a rolled up by-position view. Any single position's detail can be expanded by clicking on the position number/position name (click anywhere within the area denoted by the green box below).

07325 - BIDEN SCHOOL	OF PUBLIC POLICY D DEMOGRAPY & SL	JRVEY Laboi	Planning	
OVERVIEW	POSITION PLANNING	ROSTER	OTHER LABOR	SUMMARY
	Position	Ci	ategory	Employee
FT Post Doctoral	Researcher			
▶ 10008099 - Post Doct	toral Researcher	FT Post Doctoral Resear	cher	VACANT - 999999999
Professional, Ful	ll Time			
10002653 - Policy Sci	ientist	Professional, Full Time		Racca, David P
10002787 - Assoc Po	licy Scientist	Professional, Full Time		Laznik, John M
10003652 - Asst Polic	cy Scientist	Professional, Full Time		VACANT - 999999999
10004471 - Assoc Po	licy Scientist	Professional, Full Time		Gross, Rebecca Anne
10005341 - Assoc Po	licy Scientist	Professional, Full Time		Chen, Wei-Ming
10008397 - Asst Polic	cy Scientist	Professional, Full Time		Brel, Yuliya
Shared Positions	click anywho to drill dow	ere denoted by the gre n on that position	en box	
10001675 - Center Dir	rector	Academic Center Directe	or	Ratledge, Edward C
TOTAL SALAR	IES			
TOTAL BENEFI	15			

With this initial expansion (or click), users will see high level salary attributes for the incumbent initially populated from HR data: **Start Date, End Date, FTE, Working Hours,** and **Pay Type**.

	POSITION PLANNING	ROSTER	OTHER LABOR	SUMMARY							
							July 2020	August 2020	September 2020	October 2020	November 2020
	Position	Ca	itegory	Emplo	/ee		Budget	Budget	Budget	Budget	Budget
FT Post Doctora	al Researcher										
10008099 - Post Dor	ctoral Researcher	FT Post Doctoral Resear	cher	VACANT - 999999999			s	0 \$0	\$0	\$0	\$0
Professional, Fu	ull Time										
10002653 - Policy Sector Se	cientist	Professional, Full Time		Racca, David P							
10002787 - Assoc P	Policy Scientist	Professional, Full Time		Laznik, John M							
10003652 - Asst Pol	licy Scientist	Professional, Full Time		VACANT - 999999999			s	0 \$0	\$0	\$0	\$0
10004471 - Assoc P	Policy Scientist	Professional, Full Time		Gross, Rebecca Anne							
10005341 - Assoc P	Policy Scientist	Professional, Full Time		Chen, Wei-Ming							
▼ 10008397 - Asst Po	olicy Scientist	Professional, Full Time		Brel, Yuliya							
Incumbent(s)		Start Date	End Date	FTE	Working Hours	Pay Type	Current Salary/Rate	Contract Type/Merit	Salary/Rate \$ Adj	New Salary/Rate	FTE Adj Salary/Rate
Brel, Yuliya		9/25/2013	m ×	1.00	37.50	Salary		Fiscal (7/1)			
Base Pay									\$0		
+ Add New Com	рТуре										
Shared Position	IS										
▶ 10001675 - Center D	Director	Academic Center Directo	r	Ratledge, Edward C							

In order to see the most expanded view of a position (in order to view the distribution purpose code(s), PS Account, Class, Distribution %'s) for a particular Comp Type, click anywhere within the applicable Comp Type ("Base Pay" in the example below) to expand:

٣	10008397 - Asst Policy Scientist	Professional, Full Time		Brel, Y	/uliya						
	Incumbent(s)	Start Date	End Date		FTE	Working Hours	Pay Type	Current Salary/Rate Contract Type/Merit	Salary/Rate \$ Adj	New Salary/Rate	FTE Adj Salary/Rate
	Brel, Yuliya	9/25/2013		m × m →	1.00	37.50	Salary	Fiscal (7/1)			
	► Base Pay								\$0		
	+ Add New CompType										

By clicking on the Comp Type (Base Pay in this example), additional areas are available for input:

								July 2020	August 2020	September 2020	October 2020	November 2020	December 2020	January 2021
	Position		ategory		Employee			Budget	Budget	Budget	Budget	Budget	Budget	Budget
* 1	10008397 - Asst Policy Scientist	Professional, Full Time		Brel, Yuliya										
	Incumbent(s)	Start Date	End Date	FTE	Working Hours	Pay Type		Current Salary/Rate	Contract Type/Merit	Salary/Rate \$ Adj	New Salary/Rate	FTE Adj Salary/Rate		
	Brel, Yuliya	9/25/2013	(11) ×	1.00	37.50	Salary			Fiscal (7/1)		_			
	▼ Base Pay									\$0				
	Purpose	Department	Account		Class		LAM %	July	August	September	October	November	December	January
	CHEP222115 - RES & PUBLIC SERV. ON SCHOOL F	07325	120200 - PROFESSIONAL	STAFF FULL-TIME	006	Distribution Override								
						Distribution %	84.00%	84.00%	84.00%	84.00%	84.00%	84.00%	84.00%	84.00%
						Distribution \$								
						Benefits	38.80%							
	UAPP177776 - 07325 1-7 BUDGETING	07325	120200 - PROFESSIONAL	STAFF FULL-TIME	006	Distribution Override								
						Distribution %	16.00%	16.00%	16.00%	16.00%	16.00%	16.00%	16.00%	16.00%
						Distribution \$								
						Benefits	41.80%							
	+ Insert New Distribution					Total Distributed Salary \$								
						Total % Allocated		100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
						Total Benefits								

- Salary/Rate \$ Adj: Merit is automatically applied (currently set by position category). Users may make manual adjustments to the salary in this field. Special attention must be paid to those employees with <1 FTE since the system adjusts the New Salary, not the FTE-adjusted salary.
- **Distribution Override**: If the employee has multiple distributions, Axiom will default to the distribution % based on actuals; however, users may override these percentages. If the distribution % changes throughout the year (for example if a position is going vacant in a particular month), users may make adjusting entries in the July through June columns. A manual override will apply to the forward months until another user entry. Do not enter a negative number (i.e. -100%) to remove a distribution, just input zero.

- Insert New Distribution: Users may insert additional distributions to an existing Employee/Comp Type. Selecting the blue text will open a pop-up which captures the necessary key fields about the distribution.
- Insert New Comp Type: Users may similarly click this text to add a new comp type.

If you would like to add a comment to a particular salary line, you must drill down to the Comp Type level (i.e. Base Pay), then you should see where you can add a comment to the far right:

Budgeting												:	\$	4 0
STUDENT CENTER Labor Plan	nning													9
OVERVIEW POSITION PLANNING	ROSTER	OTHE	RLABOR	SUMMARY										
Petition	ptember 2021 Budget	October 2021 Budget	November 2021 Budget	December 2021 Budget	January 2022 Budget	February 2022 Budget	March 2022 Budget	April 2022 Budget	May 2022 Bodget	June 2022 Budget	Plan 2022		G	omment
* 10000100 - Manager, Fac & ESport Ops														
Incumbent(s)	lary/Rate \$ Adj	New Salary/Rate	FTE Adj Salary/Rate											
Lopes, Joseph Thomas						-								
* Base Pay	\$0													
Purpose	September	Octobei	Novembur	December	January	February	March	April	May	June	Total			
STOT112117 - STUDENT CENTERS ADMIN	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.004		seat		
олов-тпъе оконов TITLE IX OFFICE Labor Pla	nning										Reject	Submit	Sa	ave
OVERVIEW POSITION PLANNIN	NG RO	ISTER	OTHER LABOR	SUMMARY	(
Position		Categor	1	Em	ployee				July 2020 Budget	August 2020 Budget	September 2020 Budget	October 2020 Budget	Nover	nber 2020 Judget

Axiom does not automatically save user input. To preserve changes to a plan file, t<u>he user must click</u> the **Save** button at the top right of the screen. Clicking **Save** will also trigger a background job to push data from the Labor plan file into the corresponding Budgeting plan file. The **Reject** and **Submit** buttons are discussed in the Workflow section of this document.

Roster

The **Roster** tab displays a high-level data summary by position. Roster is a view-only tab; it is not used for data entry. Data entry for a labor plan file is only achieved via the **Position Planning** and **Other Labor** tabs.

07325 - BIDEN SCHOOL C	DF PUBLIC POLICY D DEMOGRAPY &	SURVEY Labor	r Planning											
OVERVIEW	POSITION PLANNING	ROSTER	OTHER LABOR	SUMMA	NRY									
				Contract										
	Position	Employe	e	Туре	Start Date	End Date	FTE	Working Hours	Pay Type	Hourly Rate	Current Salary	Merit Adjustment	Salary/Rate \$ Adj	New Salary/
FT Post Doctoral	Researcher													
10008099 - Post Doctoral	Researcher	VACANT	Fisc	al	1/0/1900		1.00	0.00	Salary		\$0	-3.3%	\$0	
FT Post Doctoral Rese	archer Total						1.00	0.00			\$0			
Professional, Ful	l Time													
10002653 - Policy Scientis	st	Racca, David P	Fisc	al .	9/1/1989		1.00	37.50	Salary			-3.3%	ŝo	
10002787 - Assoc Policy S	Scientist	Laznik, John M	Fiso	al .	8/29/1994		1.00	37.50	Salary			-3.3%	\$0	
10003652 - Asst Policy Sc	cientist	VACANT	Fiso	al .	1/0/1900		1.00	0.00	Salary			-3.3%	\$0	
10004471 - Assoc Policy	Scientist	Gross, Rebecca Anne	Fisc	al .	1/1/1995		1.00	37.50	Salary			-3.3%	\$0	
10005341 - Assoc Policy S	Scientist	Chen, Wei-Ming	Fisc	al .	9/1/2009		1.00	37.50	Salary			-3.3%	\$0	
10008397 - Asst Policy Sc	sientist	Brel, Yuliya	Fisc	al .	9/25/2013		1.00	37.60	Salary			-3.3%	\$0	
Professional, Full Tim	e Total						6.00	187.50			\$383,231			
Shared Positions														
10001675 - Center Directo	ar .	Ratledge, Edward C	Ace	lemic	5/1/1972		1.00	37.50	Salary			0.0%	\$0	
Shared Positions Tota	al						1.00	37.50						
Grand Total							1.00	37.50						

Other Labor

The **Other Labor** tab is where any pooled labor expenses are entered. Amounts are to be entered in the blue areas in the Adjustment column which will sum to the Proposed Budget column. Currently, data only needs to be entered for the current budget year, **future years can be ignored.** When adding a new distribution, a comment in the far-right comment field is optional.

BUDGET Labor Planning																	Save
OVERVIEW POSITION PLANNING		ROSTER	OTHER LABOR	SUMMARY													
					_												
Purpose	Departmen	ıt	Account	Actual 2019		Budget 2020	2021 Base Budget	Ad	ljustment	2021 Projected Budget	Spread	\$ Adjustment	Pian 2022	\$ Adjustment	Plan 2023		Comments
1 - S Contracts BUDG112113 - NON-SPEND BUD REC POS REPL	00175	120400 - SUPI	PLEMENTAL PAY - PROFESSIONA		0	a		0	E	0	Even	0	c	0 0		0 Testing Other Labor	<u> </u>
Total 1 - S Contracts					0	C		0	0	0		0	0) (1	0	
2 - Grad																	
BUDG112113 - NON-SPEND BUD REC POS REPL	00175	122600 - GRAI	DUATE ASSISTANT (0/H CHARGE		0	c		0	0	0	Even	0	c	0 0		0 Testing Other Labor	
+ Insert New Distribution																	
Total 2 - Grad					0	0		0	0	0		0	() (0	
3 - Overtime BUDG112113 - NON-SPEND BUD REC POS REPL	00175	125000 - STAF	FFOVERTIME		0	c		0	0	0	Even	٥	(0 0		0 Testing Other Labor	
+ Insert New Distribution																	
Total 3 - Overtime					0	0		0	0	0		0	0) (0	
4 - Other Wages BUDG112113 - NON-SPEND BUD REC POS REPL	00175	125200 - MISC	C WAGE-INCL PRT-TIME NON UD		0	c		0	0	0	Even	0		0 0		0 Testing Other Labor	
+ Insert New Distribution																	
Total 4 - Other Wages					0	0		0	0	0		0	() (0	
5 - Student Wages																	
BUDG112113 - NON-SPEND BUD REC POS REPL	00175	126000 - STU	DENT LABOR		0	0		0	0	0	Even	0	0	0		0 Testing Other Labor	
Total 5 - Student Wages					0	C		0	0	0		0	() (1	0	
6 - Benefits (BUDGET OFFICE USE + Insert New Distribution	ONLY)																
Total 6 - Benefits (BUDGET OFFICE USE ONL)	Y)				0	C		0	0	0		0	() (0	
Total Other Labor Total Other Labor Benefits					0	C		0	0	0 0		0	0		1	0 0	

Summary

The **Summary** tab summarizes the plan data by position category (a level higher than the **Roster** tab).

07325 - ARTS & SCIENC	ED DEMOGRAPY &	SURVEY Labo	or Planning				
OVERVIEW	POSITION PLANNING	ROSTER	OTHER LABOR	SUMMAR	Y		
c	ategory	2021 Base Budget	2021 Plan	\$ Var	% Var	2021 Budgeted Benefits	2021 Total Personnel Expense
FT Limit/Term Research FT Post Doctoral Resea Professional, Full Time	her roher	\$0	\$0	\$0	0.0% 3.0% 3.0%	\$0	\$0
Subtotal					3.0%		
Other Labor Expenses		\$0	\$0	\$0	0.0%	\$0	\$0
Total Labor Expenses		\$429,877	\$442,773	\$12,896	3.0%	\$182,833	\$625,606

Additional labor reports are available to aid the user with summary reporting. Please refer to the **Reporting** section of this document.

Budgeting

Once the **Labor Planning** data has been entered, select the **Budgeting** tab and then select the plan file you wish to work on from the list of plan files on the left side of the screen.

								 49 .	Д ² (
Welcome Doug Bernart It's that time of the year againplease rev	iew your budgets below and provide inputs as indi	cated in the plan	files.						
Support Materials	Announcements	satura in p						+ Budaeting Process Summ	marv
Kaufman Hall	11/30 view								
UD Budget Office								16 _{Total}	
								16 New d00106 (TITLE IX OFFICE) d00108 (VP STRATEGIC PLAN & ANA d00172 (INSTITUTIONAL RESEARCH d00175 (BUDGET)	ALYSIS) I & EFFE
BUDGETING LABOR PLANNI	NG								
					Step				
College or Admin Unit	Dept	Dept ID	1	2	3	4	5	Status	
OFC OF THE PRESIDENT	OFC OF THE PRESIDENT	00101						Ollege / Unit Input	
☑ VICE PRES & GENERAL COUNSEL	VP & GENERAL COUNSEL	00103						Ocllege / Unit Input	
VICE PROVOST FOR DIVERSITY	UNIVERSITY DIVERSITY INITIATIV	00104						Oclege / Unit Input	
TITLE IX OFFICE	TITLE IX OFFICE	00106						Oclege / Unit Input	
VP STRATEGIC PLAN & ANALYSIS	VP STRATEGIC PLAN & ANALYSIS	00108						Ollege / Unit Input	

An alternate way to select the plan file is from the Process Summary (top right section of the home page) and select "open plan file":





Note: The **Budgeting** process covers the non-labor budgeting of <u>all</u> funds (basic budget, self-supporting, reserves, endowments, faculty start-up, etc.)

Budgeting					4J	L ⁹ 🚥
= % 🗭 🖋						
06115 - OFC INST EQUIT						
OVERVIEW	BUDGET	CONSOLIDATED SUMMARY	NARRATIVES			

Within a Budgeting plan file the tab selections are **OVERVIEW**, **BUDGET**, **FUND TYPE REVIEW**, **CONSOLIDATED SUMMARY**, and **NARRATIVES**:

- **OVERVIEW:** intended to provide high level instructions to end users entering budgets
- **BUDGET:** the primary budget data entry screen
- **FUND TYPE REVIEW**: a report across all fund types. Similar to the AFR or All Funds Report.
- **CONSOLIDATED SUMMARY:** report presenting planning P&L summing across all relevant purpose codes
- NARRATIVES: Where the user can input text comments

Overview

The **OVERVIEW** tab provides high level instructions to the user for completing the Budgeting input.

OVERVIEW	BUDGET	FUND TYPE REVIEW	co	NSOLIDATED SUMMARY	NARRATIVES	
2021 Budge	ting			Legend		
Hi Douglas,				Historical value or calculation		12,345
Thanks for your input	on the budget for 2021.			User input or updateable cell	5	1,000
Process						
1. Complete the fields	in the Budget tab.					
2. Review results in the	e Summary tab. Return to	the Budget tab to make edits, if necess	ary.			
3. Add notes in the Na	rratives tab.					
Saving						
The system does NOT	save your inputs automa	tically, so click the Save button in the up	per			
right corner of the pag	e before moving on to and	other section or tab. If you have multiple				
categories in your bud	get, make sure to save yo	ur changes when you move from one ca	ategory			
to the next.						
Submitting						
When you are ready to	submit your budget for a	pproval, click the Submit button.				

Budget

By default, Budgeting Plan files open on the **BUDGET** tab. Also by default, upon opening the Budgeting plan file, the initial purpose code displayed is the first "alphabetic" purpose code within the plan file.

07325 - BIDEN SCHOOL	of public policy D DEMOGRA	APY	& SURVEY Bud	get													Save	I
OVERVIEW	BUDGET		FUND TYPE REVIEW	CONSOLID	ATED SUMMARY	NARRATIVES												?
CHEP112145 Proposed Budget: (\$1	1,620)	=	2019 Actual \$(288,947)		2020 Budge \$(290,417)	et		▲ V \$287	ariance to Actual 7,327								0	1
Ba	udget Group		Budget Method	Actual 2018	Actual 2019	Actual Jun 992 YTD 2020	Budy 200	pet 10	% Through Budget	Base Budget 2021	% Adjust	\$ Adjust	Global % Adjust	Proposed Budget 2021	Spread Check	Comme	ts	
Revenues																		
TRANSFERS IN/(OUT))								0.0%	0	0.0%							
Total Revenues									0.0%	0	0.0%							
Personnel Expense																		
+ PROFESSIONAL SALA	VRIES								113.0%	0	-100.0%							
+ FACULTY SALARIES									60.0%	0	-100.0%							
NON EXEMPT 4038 S	ALARIES								0.0%	0	0.0%							
+ GRAD STUDENT SALA	ARIES								0.0%	0	0.0%							
+ OTHER WAGES									0.0%	0	0.0%							
STUDENT WAGES									0.0%	0	0.0%							
FRINGE BENEFITS									72.0%	0	-99.9%							
Total Personnel Expe	nse								83.2%	0	-99.4%							
- Direct Expenditures																		
+ SUPPLIES									0.0%	0	0.0%							
+ OCCUPANCY & MAIN	TENANCE								0.0%	0	0.0%							
Total Direct Expendite	ures								0.0%	0	0.0%							
Total Expenses									99.5%	0	-99.4%							
Net Operating Result									99.5%	0	99.4%							

To select a different purpose code within that DeptID (plan file), click on the "hamburger" within the blue purpose code box. An input box will pop up with all the purpose codes currently associated with that Plan File.

07325 - BIDEN SCHOOL	OF PUBLIC POLICY	Y & SURVEY Budd	jet						
	BUDGET								
CHEP112145 Proposed Budget: (\$	1,620)	2019 Actual \$(288,947)		2020 Budget \$(290,417)		▲ Variance to Actu \$287,327	ıal		
В	udget Group	Budget Method	Actual 2018	Actual 2019	Actual Jun 992 YTD 2020	Budget % Through 2020 Budget	Base Budget 2021	% Adjust	
▶ Revenues									
► TRANSFERS IN/(OUT)		Select A Budg	jet Purpose					×
Total Revenues			Dept		Fund Type	Purpose		Reviewed	
Personnel Expense			07325-CTR A	PPLIED DEMOGRAPY 8	SUR\ Basic Budget	CHEP112145-CTR APP I	DMO & SRV RES P	×	~
PROFESSIONAL SAL	ARIES		07325-CTR A	PPLIED DEMOGRAPY 8	SUR\ Basic Budget	CHEP112175-REV F&A F	ED CADSR	×	
► FACULTY SALARIES			07325-CTR A	PPLIED DEMOGRAPY 8	SUR\ Basic Budget	CHEP112176-REV F&A S	TATE CADSR	×	
NON EXEMPT 403B S	SALARIES		07325-CTR A	PPLIED DEMOGRAPY 8	SUR\ Basic Budget	CHEP112177-REV F&A 0	THER CADSR	×	
▶ GRAD STUDENT SAL	ARIES		07325-CTR A	PPLIED DEMOGRAPY 8	SUR\ Basic Budget	UHBM112195-R/E UDBM	1 RESOURCES-07:	×	~
OTHER WAGES			Selecting a new		t in the lace of uncoved o	hangas			_
STUDENT WAGES			Would you like	to save CHEP11214	5 - CTR APP DMO & SRV	RES PUB SVC			
FRINGE BENEFITS			before proceed	ning r					
Total Personnel Expe	ense						Save Don't S	Save Close	
- Direct Expenditures	S								

If you have entered any budget data in the current purpose code that you would like to preserve, click the "Save" button before moving to another purpose code. If you don't wish to save your work in this purpose code before moving on to another purpose code (or already saved), select "Don't Save."

To expand a budget area, click anywhere within the area represented by the green rectangle, "SUPPLIES" in the below example:

INISON - ARTS & SCIENCES Budget														
OVERVIEW BUDGET	FUND TYPE REVIEW	CONSOLIDATE	ED SUMMARY	NARRATIVES										
ARSC110000 ≡ Proposed Budget: (\$70,000)	2019 Actual \$(57,159)		2020 Budget \$(70,000)		▼ Varia \$(12,841)	nce to Actual								
Budget Group	Budget Method	Actual 2018	Actual 2019	Actual Jun 992 YTD 2020	Budget 2020	% Through Budget	Base Budget 2021	% Adjust	\$ Adjust	Global % Adjust	Proposed Budget 2021			
Revenues														
Total Revenues		0	0	0	0	0.0%	0	0.0%	0		0			
Personnel Expense														
OTHER WAGES		3,448	2,358	2,188	0	0.0%	0	0.0%	0		0			
STUDENT WAGES		405	368	184	0	0.0%	0	0.0%	0		0			
FRINGE BENEFITS		269	189	175	0	0.0%	0	0.0%	0		0			
BENEFITS		0	0	0	0	0.0%	0	0.0%	0		0			
Total Personnel Expense		4,122	2,914	2,547	0	0.0%	0	0.0%	0		0			
✓ Direct Expenditures														
▶ TRAVEL		3,957	0	7,236	0	0.0%	0	0.0%	0		0			
SUPPLIES		37,760	47,046	50,208	70,000	71.7%	70,000	0.0%	0		70,000			
OCCUPANCY & MAINTENANCE		5,563	7,198	5,637	0	0.0%		0.0%	0		0			
Total Direct Expenditures		47,280	54,245	63,081	70,000	90.1%	70,000	0.0%	0		70,000			
Total Expenses		51,402	57,159	65,629	70,000	93.8%	70,000	0.0%	0		70,000			
Net Operating Result		(51,402)	(57,159)	(65,629)	(70,000)	93.8%	(70,000)	0.0%	0		(70,000)			

The base budget for a particular budget item is set upfront by the Budget Office (starting from the previous year's budget or previous year's actual, etc). In this example, the base budget for Supplies is initially set equal to the previous year's budget.

You may need to scroll to the right to see the blue data entry cells. In this case, if you wanted to change the \$70,000 amount, you can adjust it by a percentage or by a dollar amount. The adjusted amount will be in the Proposed Budget column:

Budget Group	Budget Method	Actual 2018	Actual 2019	Actual Jun 992 YTD 2020	Budget 2020	% Through Budget	Base Budget 2021	% Adjust	\$ Adjust	Global % Adjust	Proposed Budget 2021
▶ TRAVEL		3,957	0	7,236	0	0.0%	0	0.0%	0		0
▼ SUPPLIES		37,760	47,046	50,208	70,000	71.7%	70,000	0.0%	0	_	70,000
140000 - BUDGETING ONLY-SUPPLIES & EXP	Input Adjustment	0	0	0	70,000	0.0%	70,000	0.0%	0	0.0%	70,000
140140 - STUDENT CENTER EXPENSE	Input Adjustment	189	730	2,326	0	0.0%	0	0.0%	0	0.0%	0
140900 - MAINTENANCE SUPPLIES	Input Adjustment	750	320	345	0	0.0%	0	0.0%	0	0.0%	0
141000 - OFFICE SUPPLIES	Input Adjustment	10,977	5,143	7,023	0	0.0%	0	0.0%	0	0.0%	0
141025 - TRAINING SUPPLIES AND EXPENSES	Input Adjustment	1,195	0	0	0	0.0%	0	0.0%	0	0.0%	0
141800 - PUBLIC SAFETY SERVICES	Input Adjustment	405	240	270	0	0.0%	0	0.0%	0	0.0%	0
142000 - FOOD FOR RESALE	Input Adjustment	0	0	93	0	0.0%	0	0.0%	0	0.0%	0
142100 - ALL OTHER PAPER	Input Adjustment	0	281	0	0	0.0%	0	0.0%	0	0.0%	0
142500 - INK	Input Adjustment	0	81	0	0	0.0%	0	0.0%	0	0.0%	0
144100 - CONFERENCE EXP (HOSTED BY UD)	Input Adjustment	0	156	0	0	0.0%	0	0.0%	0	0.0%	0

If the user wants to add a PS Account that is not currently listed for a particular budget group, they can click on the blue text (in this example "Add SUPPLIES"). A searchable listing of PS Accounts restricted to that Budget Group (i.e. Supplies) pops up. The user can select the account they want to add and click OK.

	Budget	Actual	Actual	Actual	Budget	% Through	Base Budget			
Budget Group	Method	2018	2019	Jun 992 YTD 2020	2020	Budget	2021	۹	Adjust	
148003 - BOOKING FEES	Input Adjustment	0	0	35	0	0.0%	С		0.	0%
148004 - BANKING FEES	Input Adjustment	0	0	5	0	0.0%	c		0.	0%
148300 - SUBSCRIPTIONS/PUBLICATIONS	Input Adjustment	0	290			0.02	~		-	-
149600 - COMPUTER HARDWARE & SUPPLIES	Input Adjustment	2,501	10,916	Calc Method	d Variables					×
149800 - OTHER SUPPLIES&EXP	Input Adjustment	100	2,105	Select Acct						
149820 - INTERNATIONAL SERVICE FEE	Input Adjustment	0	0	140001 BUDG		55105			<u> </u>	
149821 - VISA APPLICATION FEES	Input Adjustment	0	0	140001 - BUDGT	ONLY-CARRYFWD-RS	CH OFFIC			^ ncel	ъ I
149823 - UD PARKING SERVICES EXPENSE	Input Adjustment	38	0	140003 - BUDG	ONLY-RSCH OFC AWAR	D CLOSE				- I
149842 - FURNITURE	Input Adjustment	0	83	140100 - ATHLE	TIC SUPPLIES				0.	0%
149875 - PROCARD CLEARING	Input Adjustment	10,322	7,859	140102 - ATHLE	TIC APPAREL	CAD			0.	0%
161603 - SIGNAGE	Input Adjustment	227	0	140105 - X11122	TR CHG-CHEM XRAY C	RYSTAL			0.	0%
164017 - DOORS & WINDOWS	Input Adjustment	75	0	140117 - SVC C	TR CHG-CHEM NMR				0.	0%
164018 - DOORS/FRAMES/HARDWARE	Input Adjustment	127	0	140118 - SVC C	TR CHG-CHEM MASS S	PEC			0.	.0%
164040 - PLUMBING	Input Adjustment	250	0	140119 - SVC C	TR CHG-CHEM XPS INS	TRUMNT			0.	.0%
+ Add SUPPLIES				140120 - CHEMI 140151 - SVC C	TR CHG-PHYS SMPC L	AB				
		5 569	7 108	140160 - UPS SH	HPMENTS-CENT REC/	DEL-ONL				0.0%
		0,000	7,190	140180 - SAFET	Y OFFICE-RADIOACTIV	E MATE				0.0%
Total Direct Expenditures		47,280	54,245	140190 - ANIMA	L MAINTENANCE EXP	ENSE			(0.0%
Total Expenses		51 402	57 159	140191 - SVC C	TR CHG-LAB ANIMAL N	IED			×	0.0%
Total Experioeo		51,402	37,135	Search to see m	ore results					
Net Operating Result		(51,402)	(57,159)	(65,629)	(70,000)	93.8%	(70,000)		(0.0%
	1									

The user can then enter the amount for that PS account in the Proposed Budget column.

	Budget	Actual	Actual	Actual	Budget	% Through	Base Budget			Global	Proposed Budget	Spread
Budget Group	Method	2018	2019	Jun 992 YTD 2020	2020	Budget	2021	% Adjust	\$ Adjust	% Adjust	2021	Check
148003 - BOOKING FEES	Input Adjustment	0	0	35	0	0.0%	0	0.0%	0	0.0%	0	
148004 - BANKING FEES	Input Adjustment	0	0	5	0	0.0%	a	0.0%	0	0.0%	0	
148300 - SUBSCRIPTIONS/PUBLICATIONS	Input Adjustment	0	290	0	0	0.0%	0	0.0%	0	0.0%	0	
149600 - COMPUTER HARDWARE & SUPPLIES	Input Adjustment	2,501	10,916	1,315	0	0.0%	0	0.0%	0	0.0%	0	
149800 - OTHER SUPPLIES&EXP	Input Adjustment	100	2,105	5,069	0	0.0%	0	0.0%	0	0.0%	0	
149820 - INTERNATIONAL SERVICE FEE	Input Adjustment	0	0	1,483	0	0.0%	0	0.0%	0	0.0%	0	
149821 - VISA APPLICATION FEES	Input Adjustment	0	0	460	0	0.0%	0	0.0%	0	0.0%	0	
149823 - UD PARKING SERVICES EXPENSE	Input Adjustment	38	0	0	0	0.0%	0	0.0%	0	0.0%	0	
149842 - FURNITURE	Input Adjustment	0	83	0	0	0.0%	0	0.0%	0	0.0%	0	
149875 - PROCARD CLEARING	Input Adjustment	10,322	7,859	0	0	0.0%	0	0.0%	0	0.0%	0	
161603 - SIGNAGE	Input Adjustment	227	0	0	0	0.0%	0	0.0%	0	0.0%	0	
164017 - DOORS & WINDOWS	Input Adjustment	75	0	0	0	0.0%	0	0.0%	0	0.0%	0	
164018 - DOORS/FRAMES/HARDWARE	Input Adjustment	127	0	0	0	0.0%	0	0.0%	0	0.0%	0	
164040 - PLUMBING	Input Adjustment	250	0	0	0	0.0%	0	0.0%	0	0.0%	0	
140102 - ATHLETIC APPAREL	Input Adjustment - New Ad	α 0	0	0	0	0.0%	0			0.0%	D	
+ Add SUPPLIES												
OCCUPANCY & MAINTENANCE		5,563	7,198	5,637	0	0.0%	0	0.0%	0		0	

If the user wishes to enter a budget account for a budget group that does not currently show up on the screen for that particular purpose code, the Budget Office will need to do a manual adjustment (what we call a "penny plug") in an underlying budget table. <u>The Budget Office requires the purpose code</u> <u>and account number to create the penny plug.</u> Once that is done and the plan file is refreshed, the ability to add the Proposed Budget for that item will exist. <u>If you do request a "penny plug" from the</u> <u>Budget Office, make sure you save and exit the plan file while the Budget Office enters the "penny plug" on their end.</u> Once the Budget Office confirms the penny plug has been created, you may go back into that plan file.

Once the user is finished working on a particular purpose code, remember to click Save in the upper right-hand corner. When the Budget plan file is complete, the user can submit the plan file to the approver via the Submit button (discussed in more details in Workflow).



Users can add visual clues to individual purpose codes, marking them as complete, by clicking on the blue check mark at the upper right of the **Budget** tab, turning it green. The purpose code is also then give a check mark as "Reviewed" in the purpose code listing that comes up when you click on the hamburger in the blue box to select a different purpose code. Applying a check mark also saves the work done in that purpose code.

OVERVIEW	BUDGET		FUND TYPE REVIEW	CONSOLIDAT	ED SUMMARY	NARRATIVES										1
AFAC112135	313,088)	=	2019 Actual 8(200,401)		2020 Budget s(313,088)		▼ Variano S(112,687)	ce to Actual								0
Budgeting															- 🕫 🗘 🥺	
																食 ?
TITLE IX OF															Reject Submi	t Save
OVERVIEW	BUDGET					NARRATIVES										
AFAC112135 Proposed Budget: (\$1	313,088)	Ξ	2019 Actual S(200,401)		2020 Budget \$(313,088)		• Variance \$(112,687)	e to Actual								•
	udget Group		Budget Method	Actual 2018	Actual Select A Budge	Actual Br t Purpose	daet	5 Through Base Budget			×	Global % Adjust	Proposed Budget 2021	Spread Check	Con	umenta.
+ Revenues					Dept	Fur	id Type	Purpose		Reviewed						
Total Revenues				.0	00106-TITLE IX	OFFICE 6	asic Budget	AFAC112135-TITLE IX EXPER	NSES	0	^		0			
Personnel Expense					00106-TITLE IX	OFFICE B	asic Budget	AFAC112136-TITLE IX OFFIC	E	×						
+ OTHER WAGES				1,595	CO106-TITLE IX	OFFICE B	asic Budget	AFAC112137-YE SWEEP - TIT	ILE IX OFFICE	×	_		5,103			
FRINCE BENEFITS				124	CO106-TITLE IX	OFFICE E	asic Budget	AFAC112139-TITLE IX PC EQ	UIPMENT AL	×			400			
Total Personnel Expe	nse			1,719	UUTU6-TITLE IX	UFHUE D	asic budget	AFACT12/77-BASIC BUD AL	LOG-TITLE IX	×	- 1		5,511			
- Direct Expenditures	• · ·				Selecting a new F	Purpose may result in the los	is of unsaved cha	anges.								
+ TRAVEL				6,488	proceeding?	VATOR NOTIZING TITLE	A 243 24323 081						13,329			
* SUPPLIES				77,847				Save	Don't S	Clos			264,143			
. OCCUPANCY & MAIN	TENANCE			142,579				387	- utina	Citie			30,105			

Fund Type Review

The **Fund Type Review** tab shows the current budget across the relevant fund types just for this DeptID. This view is similar to the AFR report or all funds template.

								/
GRADUATE AND PROFESSI	UNAL EDUC TE	uuyei						
OVERVIEW BUDGET	FUND TYPE REVIEW	CONSOLIDAT						
		_						
l								
Budget Category	Budget 2020	Proposed Budget 2021	Variance	Basic Budget	Allocated	Gifts	Endowment Income	Externally Sponsored
								Activity
Revenues								
STUDENT AID	(3,600)	(3,600)	(0.0%) -	0	0	(3,600)	0	0
GRAD TUITION EXPENSE	(1,900,844)	(1,900,844)	(0.0%) -	(1,775,496)	0	0	(125,348)	0
CONTRACTS & GRANTS	105,000	105,000	(0.0%) 💌	0	0	0	0	105,000
GIFTS	2,732,378	2,732,378	(0.0%) -	0	0	2,732,378	0	0
ENDOWMENT SPENDING PAYOUT	645,696	645,696	(0.0%) -	0	0	0	645,696	0
OTHER INVESTMENT INCOME	13,651	13,651	(0.0%) -	0	749	9,916	2,986	0
CENTRAL SUPPORT ALLOCATION	10,425,918	10,425,918	(0.0%) 🔺	10,425,918	0	0	0	0
TRANSFERS IN/(OUT)	(37,000)	(37,000)	(0.0%) 💌	(55,146)	18,146	0	0	0
TRANSFERS - YEAR END SWEEP IN/(OUT)	113,232	113,232	(0.0%) 🔺	0	113,232	0	0	0
Total Revenues	12,094,431	12,094,431	(0.0%) 🔺	8,595,276	132,127	2,738,694	523,334	105,000
Personnel Expense								
PROFESSIONAL SALARIES	933,046	817,757	(12.4%)	817,757	0	0	0	0

Consolidated Summary

The **Consolidated Summary** shows the proposed budget for all purpose codes within that specific plan file, along with previous year's actuals and budgets.

01501 - GRADUATE & PR	21501 - GRADUATE & PROFESSI STUDIES GRADUATE AND PROFESSIONAL EDUC Budget													
OVERVIEW	BUDGET	FUND TYPE R	EVIEW	CONSOLIDA	TED SUMMARY	NARRATIVES								
				-										
				Actual	Actual	Actual	Budget	% Through	Base Budget	Proposed Budget				
	Budget Category		Drill	2018	2019	Dec YTD 2020	2020	Budget	2021	2021				
Revenues														
STUDENT AID			Q	266	(266)	0	(3,600)	0.0%	(3,600)	(3,600)				
GRAD TUITION EXPEN	ISE		Q	(1,765,341)	(1,459,205)	(630,917)	(1,900,844)	33.2%	(1,900,844)	(1,900,844)				
CONTRACTS & GRAN	TS		Q	0	0	0	105,000	0.0%	105,000	105,000				
GIFTS			Q	2,500,400	2,500,000	75	2,732,378	0.0%	2,732,378	2,732,378				
ENDOWMENT SPEND	ING PAYOUT		Q	368,561	369,877	150,796	645,696	23.4%	645,696	645,696				
OTHER INVESTMENT	INCOME		Q	29,025	13,971	2,690	13,651	19.7%	13,651	13,651				
CENTRAL SUPPORT A	LLOCATION		Q	9,426,397	10,400,080	0	10,425,918	0.0%	10,425,918	10,425,918				
TRANSFERS IN/(OUT)	1		Q	(48,834)	(203,651)	(7,751)	(37,000)	20.9%	(37,000)	(37,000)				
TRANSFERS - YEAR E	ND SWEEP IN/(OUT)		Q	(439)	(166,315)	0	113,232	0.0%	113,232	113,232				
Total Revenues				10,510,033	11,454,492	(485,107)	12,094,431	-4.0%	12,094,431	12,094,431				
Personnel Expense														
PROFESSIONAL SALA	RIES		Q	695,275	801,741	301,674	933,046	32.3%	0	817,757				

Narratives

The **Narratives** tab can be used for free form text entry to provide additional comments within the plan file.

01501 - GRADUATE & PR	OFESSL STUDIES	SIONAL EDUC Bud	lget	
OVERVIEW	BUDGET	FUND TYPE REVIEW	CONSOLIDATED SUMMARY	NARRATIVES
Sample Narrative Questio	n	This is a test.		

Reporting

To access the various budgeting reports available within Axiom, click on the "hamburger" in the upper left corner of the home page.

The folders **Budgeting Reports** and **Labor Reports** sections contain reports that can be utilized for budget reporting.

<i>بر</i> هو =										
Navigation 🖡	Welcome Douglas Bernart									
> \star Favorites	It's that time of the year againplease review y	our budgets belov	w and provide inputs as indicated	in the plan files.						
> ② Recent Places	Support Materials		Announcements						+	Bu
A Home	Kaufman Hall UD Budget Office									0
🕶 🖺 Financial Reports										Ŭ
Balance Sheet										10
Budget vs Actual										0 [
Dataset Comparison										0.0
Fund Type										
Trend	BUDGETING LABOR PLANNING									
Year Over Year Comparison						6	ton			
> 💩 Security Report	Dept Level 4	Dept		Dept ID	1	2	3	4	Status	
 Budgeting Reports 	G OFC OF THE PRESIDENT	OFC OF TH	IE PRESIDENT	00101					Budget Office A	pproval
Budget FundType Report	☑ VICE PRES & GENERAL COUNSEL	VP & GENE	RAL COUNSEL	00103					Budget Office A	pproval
Summary Report	VICE PROVOST FOR DIVERSITY	UNIVERSIT	Y DIVERSITY INITIATIV	00104					Budget Input	
✓ ▲ Labor Reports	C TITLE IX OFFICE	TITLE IX O	FFICE	00106					8 Budget Approva	al
Labor Distribution	VICE PRES & UNIV SECRETARY	OFC OF UN	IVERSITY SECRETARY	00130					Budget Approva	al
Labor Distribution to Budget Tie-	G OFC OF EXEC VICE PRESIDENT	OFFICE OF	EXEC V/P & UNIV TREA	00160					8 Budget Approva	al
Labor Roster	H 4 1 2 3 4 5 F H				_	_	_	_		
Report Designer										

Budgeting Reports / Budget Fund Type Report

The Budget Fund Type Report shows the current & proposed budgets in total by Revenue/Expense Categories and breaks out the Proposed Budget by Fund Type. This is somewhat similar to the All Funds Reporting (AFR) template.

E T 🗭 ۶									
Navigation	*	Rudget Fund Type							
bataatt oompanaon		All Departments							
Fund Type	^	All Purpose Codes							Report Options
Trend									
Year Over Year Comparison		Budget Group	Budget 2020	Proposed Budget 2021	Variance	Basic Budget	Self-Supporting	Allocated	Startup
✓ 2- Dept Effective Dating Reports		Revenues							
Budget vs Actual (Dept Eff Dating)	UNDERGRAD TUITION & FEES	502,314,651	502,314,651	0.0% 💌	501,605,216	709,435	-	-
		STUDENT AID	(127,646,066)	(127,626,066)	(0.0%) •	(105,299,455)	(56,314)	(407,785)	
Fund Type (Dept Eff Dating)		GRADUATE TUITION & FEES	109,252,805	109,252,805	0.0% 👻	109,218,636	34,169		
Year Over Year Comparison (Dept	E	GRAD TUITION EXPENSE	(75,610,540)	(75,610,540)	0.0% 🔺	(70,543,347)	(504,844)	(915,927)	-
N 🏯 Consulty Depart		OTHER TUITION & FEES	74,135,193	74,042,193	(0.1%) •	35,728,504	38,299,789	13,900	
 a Security Report 		STATE UNRESTRICTED APPROP	94,924,100	94,924,100	0.0% 💌	94,924,100			
✓ I Budgeting Reports		STATE RESTRICTED APPROP	27,823,000	27,823,000	0.0% 👻	-		-	
Rudget EurodType Report		FEDERAL APPROPRIATIONS	3,111,149	3,111,149	0.0% 👻			-	
Budget Fund Type Report		CONTRACTS & GRANTS	154,976,003	155,053,921	0.1% 🔺	1,587,389	231,060	918	-
Summary Report		F&A RECOVERY	40,062,768	40,062,768	0.0% 💌	37,089,984			
✓ ▲ Labor Reports		GIFTS	42,662,814	42,592,814	(0.2%) •	1,113,188	-	-	-
-		ENDOWMENT SPENDING PAYOUT	52,274,856	52,274,856	0.0% 👻	30,106,117		2,149,100	
Labor Distribution		OTHER INVESTMENT INCOME	20,074,664	18,859,949	(6.1%) 💌	16,487,603	14,560	1,427,667	
Labor Distribution to Budget Tie-Out		OTHER REVENUE	23,693,556	23,645,175	(0.2%) •	227,412	11,939,867	10,525,660	-
		ACTIVITIES OF EDUC DEPTS	24,047,277	24,210,291	0.7% 🔺	829,569	20,806,322	1,822,437	
Labor Roster		AUXILIARIES	132,846,042	133,619,296	0.6% 🔺	249,916	133,365,938	3,442	

The filter on the report can be used to select an individual college/unit or groups of departments:



After you select a College/Unit/Department selection from the filter, you need to click the "Apply" button for those changes to be applied.

The Report Options in the upper right section of the report allow exporting to Excel (tabular view), Export to Excel (Formatted Report), and Print to PDF.



Excel (tabular view)

Budget Fund Type										
All Departments										
All Purpose Codes										
Category	Budget Group	Budget 2020	Proposed Budget 2021	Variance	Basic Budget	Self-Supporting	Allocated	Startup	Service Centers	Gifts
Revenues	UNDERGRAD TUITION & FEES	502,314,651	502,314,651	0.0%	501,605,216	709,435	-	-	-	-
Contra-Revenues	STUDENT AID	(127,646,066)	(127,626,066)	(0.0%)	(105,299,455)	(56,314)	(407,785)	-	-	(2,358,956)
Revenues	GRADUATE TUITION & FEES	109,252,805	109,252,805	0.0%	109,218,636	34,169	-	-	-	-
Contra-Revenues	GRAD TUITION EXPENSE	(75,610,540)	(75,610,540)	0.0%	(70,543,347)	(504,844)	(915,927)	-	-	(741,317)
Revenues	OTHER TUITION & FEES	74,135,193	74,042,193	(0.1%)	35,728,504	38,299,789	13,900	-	-	-
Revenues	STATE UNRESTRICTED APPROP	94,924,100	94,924,100	0.0%	94,924,100	-	-	-	-	-

Excel (formatted report)

Budget Fund Type												
All Departments												
All Purpose Codes												
Budget Group	Budget 2020	Proposed Budget 2021	Variance	Basic Budget	Self- Supporting	Allocated	Startup	Service Centers	Gifts	Endowment Income	State Restricted Appropriatio n	Externally Sponsored Activity
Revenues												
UNDERGRAD TUITION & FEES	502,314,651	502,314,651	0.0%	501,605,216	709,435	-	-	-	-		-	-
STUDENT AID	(127,646,066)	(127,626,066)	(0.0%)	(105,299,455)	(56,314)	(407,785)	-	-	(2,358,956)	(4,855,253)	(11,542,759)	(3,105,544)
GRADUATE TUITION & FEES	109,252,805	109,252,805	0.0%	109,218,636	34,169		-		-	-		
GRAD TUITION EXPENSE	(75,610,540)	(75,610,540)	0.0%	(70,543,347)	(504,844)	(915,927)	-	-	(741,317)	(198,545)	-	(2,706,560)
OTHER TUITION & FEES	74,135,193	74,042,193	(0.1%)	35,728,504	38,299,789	13,900	-	-	-		-	-
STATE UNRESTRICTED APPROP	94,924,100	94,924,100	0.0%	94,924,100	-	-	-	-	-	-	-	-
STATE RESTRICTED APPROP	27,823,000	27,823,000	0.0%	-		-		-	-		27,823,000	
FEDERAL APPROPRIATIONS	3,111,149	3,111,149	0.0%	-	-					-		3,111,149

Print to PDF

8 🖶	Q	1 / 2						
() () ()		Budget Fund Type All Departments All Purpose Codes						
		Budget Group	Budget 2020	Proposed Budget 2021	Variance	Basic Budget	Self-Supporting	Allocated
		Revenues						
		UNDERGRAD TUITION & FEES	502,314,651	502,314,651	0.0%	501,605,216	709,435	-
		STUDENT AID	(127,646,066)	(127,626,066)	(0.0%)	(105,299,455)	(56,314)	(407,785)
		GRADUATE TUITION & FEES	109,252,805	109,252,805	0.0%	109,218,636	34,169	-
		GRAD TUITION EXPENSE	(75,610,540)	(75,610,540)	0.0%	(70,543,347)	(504,844)	(915,927)
		OTHER TUITION & FEES	74,135,193	74,042,193	(0.1%)	35,728,504	38,299,789	13,900
		STATE UNRESTRICTED APPROP	94,924,100	94,924,100	0.0%	94,924,100	-	-
		STATE RESTRICTED APPROP	27,823,000	27,823,000	0.0%	-	-	-
		FEDERAL APPROPRIATIONS	3,111,149	3,111,149	0.0%	-	-	-
		CONTRACTS & GRANTS	154,976,003	155,053,921	0.1%	1,587,389	231,060	918
		F&A RECOVERY	40,062,768	40,062,768	0.0%	37,089,984	-	-
		GIFTS	42,662,814	42,592,814	(0.2%)	1,113,188	-	-
		ENDOWMENT SPENDING PAYOUT	52,274,856	52,274,856	0.0%	30,106,117	-	2,149,100
		OTHER INVESTMENT INCOME	20,074,664	18,859,949	(6.1%)	16,487,603	14,560	1,427,667

Currently, the only data exported is what is seen on the screen, not the underlying detail.

Budgeting Reports / Summary Report

The Summary report shows two years of actuals, YTD Actual, Current Budget, and Proposed Budget at the All Funds level for all Financial Items. The Filters allow the user to view at various levels of the department tree, along with the ability to select individual Purpose Code(s).

	T 🗩 ۶					
Navig	ation 📮					
		Budget Fund Type				
> ★	Favorites	All Departments				
› Ø	Recent Places	All Purpose Codes				
*	Home	Budget Group	Budget 2020	Proposed Budget 2021	variance	
- 6	Financial Reports	Revenues				
	Balance Sheet	UNDERGRAD TUITION & FEES	502,314,651	502,314,651	0.0%	,
		STUDENT AID	(127,646,066)	(127,646,066)	0.0%	
	Budget vs Actual	GRADUATE TUITION & FEES	109,252,805	109,252,805	0.0% •	,
	Dataset Comparison	GRAD TUITION EXPENSE	(75,610,540)	(75,610,540)	0.0%	
	Fund Tune	OTHER TUITION & FEES	74,135,193	74,135,193	0.0%	,
	Fund Type	STATE UNRESTRICTED APPROP	94,924,100	94,924,100	0.0%	
	Trend	STATE RESTRICTED APPROP	27,823,000	27,823,000	0.0%	,
	Year Over Year Comparison	FEDERAL APPROPRIATIONS	3,111,149	3,111,149	0.0% *	,
	rear over rear companson	CONTRACTS & GRANTS	154,976,003	154,976,003	0.0% •	
> 🚨	Security Report	F&A RECOVERY	40,062,768	40,062,768	0.0%	,
~ 🏼	Budgeting Reports	GIFTS	42,662,814	42,662,814	0.0%	
	5 5 1	ENDOWMENT SPENDING PAYOUT	52,274,856	52,274,856	0.0% •	,
	Budget FundType Report	OTHER INVESTMENT INCOME	20,074,664	20,074,664	0.0% •	
	Summary Report	OTHER REVENUE	33,043,556	33,043,554	(0.0%)	,
	·	ACTIVITIES OF EDUC DEPTS	24,047,277	24,047,276	(0.0%)	,
× 8	Labor Reports	AUXILIARIES	132,846,042	132,846,042	0.0%	,
	Labor Distribution	CENTRAL SUPPORT ALLOCATION	-	-	0.0%	
	Labor Distribution to Dudget Tie	TRANSFERS IN/(OUT)			0.0%	
	Labor Distribution to Budget Tie	TRANSFERS - ENDOWMENT IN/(OUT)	(2,000,000)	(2,000,000)	0.0%	
	Labor Roster	TRANSFERS - F&A IN/(OUT)			0.0%	

Budgeting								
ETPF								
Filters #	Cummer Depart							
Collegel InitiDepartment Sciences	Summary Report							
condictional population of control								
Select items to create 🔻 🕷	All Purpose Codes							
Purpose Selection	Rudast Group	Actual 2018	Actual 2019	Actual Dec VTD 2020	Burdget 2020	% Through Budget	Rase Rudget 202	1 Prop
Choose a value for P * *								
	Revenues							
Clear All Cancel	FUND BALANCE ADJUSTMENT	(0)	0	Quillion III		1		
Apply	UNDERGRAD TUITION & FEES	465,418,562	480,341,846	Collegelu	init/Department Se	election		
	STUDENT AID	(103,240,747)	(115,576,885)					
	TUITION DISCOUNT	3,071,327	2,982,470	Q, Type h	ere to search			×
	GRADUATE TUITION & FEES	100,640,039	105,880,196	4 8 04	egelUnitiDepartment Sel	ection		
	GRAD TUITION EXPENSE	(65,426,857)	(72,483,771)					^
	OTHER TUITION & FEES	47,892,198	57,422,908	- O M	ejorUnit CULLEGES			1.00
	STATE UNRESTRICTED APPROP	91,975,000	95,684,420	•	College_AdminUnit AGRI	ICULTURE & NATURAL RES	OURCE	1.00
	STATE RESTRICTED APPROP	26,818,500	26,635,900	•	College_AdminUnit ARTS	S & SCIENCES		1.00
	FEDERAL APPROPRIATIONS	3,120,278	3,122,420	• •	College_AdminUnit EAR	TH OCEAN & ENVIRONMEN	т	1.88
	CONTRACTS & GRANTS	143,386,209	155,660,168		College AdminUnit FDU	CATION & HUMAN DEVELO	PMENT	1.00
	F&A RECOVERY	36,713,734	39,816,991					1.00
	GIFTS	32,702,722	39,044,599	•	College_AdminUnit ENG	INEERING		1.00
	ENDOWMENT SPENDING PAYOUT	51,428,747	51,938,405	•	College_AdminUnit HEAI	LTH SCIENCES		1.00
	OTHER INVESTMENT INCOME	20,460,744	23,374,721	•	College_AdminUnit LERM	NER COLG OF BUS & ECON		1.00
	OTHER REVENUE	25,873,850	25,359,589	• D M	ajorUnit EXEC VICE PRES	IDENT		
	ACTIVITIES OF EDUC DEPTS	25,513,508	25,734,381		aiorUnit GENERAL UNIVE	RSITY OPERATIONS		
	AUXILIARIES	126,501,605	130,148,881					~
	TRANSFERS IN/(OUT)	(0)	(0)		ajoronii ercesiden i			- 1
	TRANSFERS - ENDOWMENT IN/(OUT)	3,722,039	(3,472,309)			0	K Cancel	
	TRANSFERS - F&A IN/(OUT)	(0)	(0)			0.0-0		

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Filters ¥ CollegeUnit/Department Selection Select items to create ▼	Summary Report Al Departments All Purpose Codes								
Purpose Selection	Budget Group	Actual 2018	Actual 2019	Actual Dec YTD 2020	Budget 2020	% Through Budget	Base Budget 2021	Proposed Budget 2021	YoY Budget Variance %
	Revenues								
Clear All Cancel	FUND BALANCE ADJUSTMENT	(0)	0	-	-	0.0%			0.0%
Apply	UNDERGRAD TUITION & FEES	465,418,562	480,341,846	239,449,742	502,314,651	47.7%		502,314,651	0.0%
	STUDENT AID	(103,240,747)	(115,576,885)	(63,088,979)	(127,646,066)	49.4%		(127,646,066)	0.0%
	TUITION DISCOUNT	3,071,327	2,982,470			0.0%			0.0%
	GRADUATE TUITION & FEES	100,640,039	105,880,196	47,721,620	109,252,805	43.7%		109,252,805	0.0%
	GRAD TUITION EXPENSE	(65,426,857)	(72,483,771)	(34,171,795)	(75,610,540)	45.2%		(75,610,540)	0.0%
	OTHER TUITION & FEES	47,892,198	57,422,908	32,176,250	74,135,193	43.4%		74,135,193	0.0%
	STATE UNRESTRICTED APPROP	91,975,000	95,684,420	39,828,003	94,924,100	42.0%		94,924,100	0.0%
	STATE RESTRICTED APPROP	26,818,500	26,635,900	12,763,250	27,823,000	45.9%		27,823,000	0.0%
	FEDERAL APPROPRIATIONS	3,120,278	3,122,420	1,341,954	3,111,149	43.1%		3,111,149	0.0%
	CONTRACTS & GRANTS	143,386,209	155,660,168	69,257,213	154,976,003	44.7%		154,976,003	0.0%
	F&A RECOVERY	36,713,734	39,816,991	18,616,894	40,062,768	46.5%		40,062,768	0.0%
	GIFTS	32,702,722	39,044,599	10.058,927	42,662,814	23.6%		42,662,814	0.0%
	ENDOWMENT SPENDING PAYOUT	51,428,747	51,938,405	21,320,596	52,274,856	40.8%		52,274,856	0.0%
	OTHER INVESTMENT INCOME	20,460,744	23,374,721	8,253,971	20,074,664	41.1%		20,074,664	0.0%
	OTHER REVENUE	25,873,850	25,359,589	13,302,662	33,043,556	40.3%		33,043,554	0.0%
	ACTIVITIES OF EDUC DEPTS	25,513,508	25,734,381	10,559,467	24,047,277	43.9%		24,047,276	0.0%
	AUXILIARIES	126,501,605	130,148,881	62,053,584	132,846,042	46.7%		132,846,042	0.0%
	TRANSFERS IN/(OUT)	(0)	(0)	(0)	-	0.0%			0.0%
	TRANSFERS - ENDOWMENT IN/(OUT)	3,722,039	(3,472,309)	(501,991)	(2,000,000)	25.1%		(2,000,000)	0.0%
	TRANSFERS - F&A IN/(OUT)	(0)	(0)	0		0.0%			0.0%
	TRANSFERS - YEAR END SWEEP IN/(OUT)	0	(0)			0.0%		3	0.0%

Once the Filter is selected, you have to click on the "Apply" button for the filter to be applied to the current report.

Labor Reports / Labor Distribution

The Labor Distribution report lists the positions along with many of the applicable fields (Position, Name, Dept, Account, etc). Note: The "Position Plan File" column shows in which plan file the position is managed. The "Plan File" column shows the recipient plan file of the distribution.

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Filters # Selected PlanFile 'd00103' * H	Labor Distribution Parile IN (420102) Al Departments Al Purpose Colles										Report	Options Definitions
Selected Dept	Position Category	Position ID	Position Description	Employee ID	Employee Description	Position Plan File	Plan File	Fund	Dept	Apot	Benefit Aoct	Class
Select items to create V X												
Selected Fund	Totals											
Choose a value for A V	Professional, Full Time	10005523	Assistant General Counsel	700713272	Yope, Bradley John	d00103	d00103	Basic Budget	d00103	120200	129100	14
	Professional, Full Time	10005620	Asst to the General Counsel	702216656	Simbulan, Arlene Reyes	d00103	d00103	Basic Budget	d00103	120200	129100	13
Selected Purpose	Professional, Full Time	10005857	Associate General Counsel	702382291	Conley, Fatimah R	d00103	d01580	Externally Sponsored Activity	d01580	120200	129100	10
Choose a value for P 🔻 🗶	Professional, Full Time	10005890	Assoc VP & Deputy Gen Counsel	700501962	Becnel-Guzzo, Jennifer Morgan	d00103	d00103	Basic Budget	d00103	120200	129100	12
	Professional, Full Time	10006087	Associate General Counsel	702451293	Ivancikova, Daniela	d00103	d00103	Basic Budget	d00103	120200	129100	10
Selected Class	Professional, Full Time	10008211	Assoc GC & Chief Privacy Off	9999999999	VACANT	d00103	d00103	Basic Budget	d00103	121100	129100	0
Choose a value for Cl 🔻 🗙	Salaried Staff, F/T 37.5	10005755	Administrative Assistant IV	702386654	Tapel, Daisy Romualdo	d00103	d00103	Basic Budget	d00103	123000	129300	402
	Senior Administrators	10005575	Vice Pres & Gen Counsel	701523842	Ergin, Laure Bachich	d00103	d00103	Basic Budget	d00103	120200	129100	11
Clear All Cancel Apply												

Labor Reports / Labor Distribution to Budget Tie-Out Report

The Labor Distribution to Budget Tie-Out Report allows the user to select an individual labor plan file, and view the various labor data for that plan file. The individual sections on the report are split out to show:

- 1. DEPARTMENT OWNED POSITIONS (those positions planned and reported in the same plan file)
- 2. DEPARTMENT OWNED POSITIONS (where the positions are planned within this plan file, but portions of that position display in <u>another</u> plan file)
- 3. SHARED POSITIONS (these positions are planned in other plan files but a portion or all of that salary is charged to this plan file)
- 4. OTHER LABOR

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ters #													
A second second	Labor Distribution to B	udget He-Ol	π									Report 0	Options
Selected PlanFile	PlenFile = d00163											R 🖻	₽ ⊕
d00163 - OFC ECON INF * ×											Salaries	Renefits	Total
										Labor Position Planning	944.259	424.075	1.368.334
Clear All Cancel										Other Labor	22,866	229	23,095
Apply										Budget Plan File	540,612	245,921	786,533
										BUD table (check)			786,533
	Position Category	Position ID	Position Description	Employee ID	Employee Description	Position Plan File	Plan File	Fund	Dept	Aost	Benefit Acct	Class	Purpose
	DEPARTMENT OWNED POSITIONS (Planne	d in Labor Plan File d001	63. displays in Budget Plan File d00163)										
	Professional, Full Time	10005394	Assoc Vice President	13143	Weir, David S	d00163	d00163	Basic Budget	d00163	120200	129100		OEIP110000
	Professional, Full Time	10005400	Assistant Director, OEIP	700233438	Rassias, Amalea Panagiota	d00163	d00163	Basic Budget	d00163	120200	129100	5	OEIP110000
	Professional, Full Time	10005484	Financial Analyst I	54594	O'Leary, Stephanie Renee	d00163	d00163	Basic Budget	d00163	120200	129100 5		0EIP110000
	Professional, Full Time	10005551	Tech Business Dev Analyst	702453725	Blaustein, Michael Alan	d00163	d00163	Basic Budget	d00163	120200	129100 5	05	0EIP110000
	Professional, Full Time	10006058	Sr Tech Transfer Associate	9999999999	VACANT	d00163	d00163	Basic Budget	d00163	121100	129100 0		OEIP112113
	Professional, Full Time	10006343	Associate Director, OEIP	39068	Bowman, J Michael	d00163	d00163	Self-Supporting	d00163	120200	129100 8		0EIP212111
	Salaried Staff, F/T 37.5	10001348	Administrative Assistant II	700559292	Gilberti, Angela Marie	d00163	d00163	Self-Supporting	d00163	123000	129300	03	OEIP212111
	Salaried Staff, F/T 37.5	10006673	Administrative Assistant IV	702216909	Honaker, Cheryl Ann	d00163	d00163	Basic Budget	d00163	123000	129300 4	02	OEIP110000
	DEPARTMENT OWNED POSITIONS (Planne	d in Labor Plan File d001	63, displays in other Budget Plan File)										
	Professional, Full Time	10005090	Licensing Analyst	700710453	Bierlein, Denise Michelle	d00163	d00178	Basic Budget	d00178	120200	129100	10	IPCT112111
	Professional, Full Time	10005394	Assoc Vice President	13143	Weir, David S	d00163	d01165	Externally Sponsored A	d01165	120200	129100		CCZR317777
	Professional, Full Time	10005400	Assistant Director, OEIP	700233438	Rassias, Amalea Panagiota	d00163	d01165	Externally Sponsored A	d01165	120200	129100 2	5	CC2R317777
	Professional, Full Time	10005484	Financial Analyst I	54594	O'Leary, Stephanie Renee	d00163	d02708	Externally Sponsored A	d02708	120200	129100		SBDC317777
	Professional, Full Time	10005612	Assistant Director	701812634	Goswami, Joy	d00163	d00178	Basic Budget	d00178	120200	129100	07	IPCT112111
	Professional, Full Time	10006343	Associate Director, OEP	39068	Bowman, J Michael	d00163	d03101	Externally Sponsored A	d03101	120200	129100 8		ENGR317777
	Professional, Full Time	10006343	Associate Director, OEIP	39068	Bowman, J Michael	d00163	d00178	Basic Budget	d00178	120200	129100 8		IPCT112111
	Professional, Full Time	10006343	Associate Director, OEIP	39068	Bowman, J Michael	d00163	d02708	Externally Sponsored #	d02708	120200	129100 8		SBDC317777
	Professional, Part Time	10005682	Sr Licensing Associate	19598	Johnson, William B	d00163	d00178	Basic Budget	d00178	120300	129100 2	2	IPCT112111
	SHARED POSITIONS (Planned in other labor	plan file, R/O in labor pl	an file d00163, displays in budget plan file d001	63)									
	OTHER LABOR (Labor Plan File: d00163)												
						<							>

A good reconciliation check is that the Budget Plan File total number (3rd number in the block on the top right) should tie to the consolidated summary in the Budgeting plan file. This number is also the total labor charge including Other Labor for this plan file. The Labor Position Planning total amount (1st number on the top right) should tie to the Total at the bottom of the Position Planning tab in the Labor Plan file.

Note: this report is only used to reconcile one plan file at a time.

PlanFile IN (d00635)														Report O	ptions
Position	Employee	Contract Type	Start Date	End Date	FTE	Working Hours	РауТуре	Hourly Rate	Current Salary	Merit Adjustment	Salary/Rate \$ Adj	New Salary/Rate	FTE Adj Salary/Rate	Plan 2021	
Professional, Full Time															
10000303 - Sr HRIS Analyst	VACANT - 999999999	F	9/17/2020		1.00	0.00	Salary			-3.3%	\$0				
10002024 - HRIS Analyst	Wilson, Kathie L	F	10/6/1993		1.00	0.00	Salary			-3.3%	\$0				
10004690 - Director, HRIS	VACANT - 999999999	F	9/17/2020		1.00	37.50	Salary			-3.3%	\$0				
10006256 - Sr HRIS Analyst	VACANT - 999999999	F	9/17/2020		1.00	37.50	Salary			-3.3%	\$0				
10006611 - Sr HRIS Analyst	Walls, Jamie Ranae	F	5/20/2019		1.00	0.00	Salary			-3.3%	\$0				
10008290 - Manager, HRIS	Goldstein, Nancy L	F	11/12/2013		1.00	0.00	Salary			-3.3%	\$0				
Professional, Full Time, Total					6.00	75.00			\$231,243					\$223,535	1
Shared Positions															
10000668 - HR Data Assistant	VACANT - 999999999	F	9/17/2020		1.00	37.50				-3.3%					
10000720 - HR Data Specialist	Moye, Eileen		6/18/2018		1.00	37.50				-3.3%					
10002930 - Talent Engage & Onboarding Spl	Smith, Cristen Easton	F	3/12/2018		1.00	0.00				-3.3%					
10003191 - HR Assistant	Blandford, Joy L		8/20/2012		1.00	0.00				-3.3%					
Shared Positions Total					4.00	75.00			\$139,619					\$134,965	1
Grand Total					10.00	150.00			\$370,862					\$358,500	

Labor Reports / Labor Roster

The Labor Roster report shows roster data for one or multiple labor plan files. Multiple plan files can be selected via the Filter (looks like a thumbtack in the upper left corner of the report). Note: the list of plan files within the filter is limited to 100 visible plan files, but you can locate your specific plan files by using the search mechanism (see screen shot below)

Budgeting											
Ξ Τ 🗭 ۶											
Filters 👐											
Selected PlanFile Choose a value for Planfile.											
Apply Clear All Cancel	Employee	Contract Type	Start Date	End Date	FTE	Working Hours	PayType	Hourly Rate	Current Salary	Merit Adjustment	Salary/Rate \$ Adj
-					0.00	0.00			ŚO		
-					0.00	0.00			\$0		
						Choo: Type h 0000 0000 0000 0000 0000 0000 0000 0	se a value for ere to search 101 - OFC OF THE P 103 - VP & GENERA 104 - UNIVERSITY D 104 - UNIVERSITY D 105 - UNIVERSITY 108 - VP STRATEGIN 108 - OFC OF UNIVE 1183 - OFC OF UNIVE 1183 - OFC OF UNIVERSITY 1172 - OFC OF INSTI	Planfile. "RESIDENT L COURSEL INVERSITY INITIATIV CE C PLAN & ANALYSIS IRSITY SECRETARY CE V/P & UNIV TREA VOY AND PARTNERSI RVICES TUTIONAL RESEARCH	HIP 1	X Select All / Clear All	

Workflow for Labor Plan Files

Workflow is the routing of plan files for review and approval. When you log into Axiom, the default home page initially lands on the Budgeting tab. The home page provides information about your budgeting role and the status of your workflow within the Process Summary section in the upper right area of the home page.

Clicking on the Labor Planning tab will take you to the Labor plan files. You will know you are on the Labor tab because the "Labor Planning" tab will darken, and you will see the "Labor Planning Process Summary" in the upper right.

t's that time of the year againplease review your budgets	below and provide inputs as indicated in the plan files.								
Support Materials	Announcements							Labor Planning Process Summary	
Kaufmen Hall UD Budget Office	11.00							3 Total 0 New	
BUDGETING LABOR PLANNING									
					Step				
College or Admin Unit	Dept	Dept ID	1	2	3	4	5	Status	
C OFC OF THE PRESIDENT	OFC OF THE PRESIDENT	00101	.0		.01	-		C Labor Plan Completed	1
VICE PRES & GENERAL COUNSEL	VP & GENERAL COUNSEL	00103					10	College / Unit Labor Input	
C VICE PROVOST FOR DIVERSITY	UNIVERSITY DIVERSITY INITIATIV	00104	. 61		10	-	12	College / Unit Labor Input	
TITLE IX OFFICE	TITLE IX OFFICE	00105	10		100		10	College / Unit Labor Input	
C VICE PRES & UNIV SECRETARY	OFC OF UNIVERSITY SECRETARY	00130	- 10		10	-	12	College / Unit Labor Input	
C OFC OF EXEC VICE PRESIDENT	OFFICE OF EXEC V/P & UNIV TREA	00160			- 10	- 10	15	College / Unit Labor Input	
C RESEARCH OFFICE (EXCL NIIMBL)	OFC ECON INNOV AND PARTNERSHIP	00163			.0		- 10	College / Unit Labor Input	

Labor Planning Process Summary



The **Labor Planning Process Summary** (upper right side of the Labor home page) lists those Labor Plan files (maximum of 15) that are awaiting action. The options that the user has for these plan files are:

- 1. Enter/update data in the plan file
- 2. Approve (or push) to the next step in the workflow process
- 3. Reject the plan file which sends the file back to the previous workflow step

Clicking on a labor plan file name from the **Process Summary** list will bring up the **Process Routing** page for that particular plan file. The Process Routing page shows the process status, history, and details for the selected plan file.

Labor Process Routing (aka Routing Page)



The actions that can be taken from the Labor Process Routing page are to Reject, Approve or Open Plan File.



Currently most labor plan files will start out in Workflow Step 2. Step 1 will only be used when the decision is made to start workflow at a lower (i.e. more like at a Department) level. Step 1 is skipped for most organizations at this time.

In this typical example of a College/Unit's workflow starting in Level 2, the user should ignore that the Action step that shows the plan file going to Step 3 if rejected. This is incorrect (current system limitation). Even if you did click on the reject here in Step 2, the system will give you an error message.



Budgeting		III 🛷 ऺ 🖷	AXION
= p			÷ ?
SCHOOL OF EDU PLANFILE d02922	Reject PLANFILE d02922 SCHOOL OF EDUCATION	ж	open plan file
3 Labor Plan Approve Previous Error	3 Labor Plan Approval 2 Labor Plan	n Review Labor Pla	n Approval
All Steps All Proc Show Dr	taile		
Step		ox	Days in Step
Call Labor Planning			
Labor Plan Rev			1.0
2 Labor Plan Apg		and a strength	
Budget Office	-		
Plan Completed	Not Started Linnei Othert, John Poet	Imenn Brian Sakiewicz	
<			>

If the user clicks on the "Approve" button, the system takes you to an intermediate step where the user can add a comment before clicking on the Approve button. The user can also see here who the owner is of the next step.

Budgeting			III 4	
E Ø				合 ?
SCHOO PLANFILE do	DL OF EDU	Approve PLANFILE d02922 SCHOOL OF EDUCATION	×	open plan file
3 Labo	r Plan Approvi	2 Labor Plan Review	3 Labor Plan Approval	Labor Plan Approval
Previous		Approved Step	Next Step Step Owner: Rachel Miniz and Garj No due date	
Al Depa	All Process Acts			
	Step	2		Days in Step
0 []	Later Planning			0
	Labor Plan Rev			tî.
	Labor Plan App	1000 characters remaining		
	Budget Office		Agenese Cancel	
	Plan Completed	Net Darted Lion	el OlibertJohn Poehimann,Brian Sakiev	
4				,

The Approve/Reject functions listed on the Labor Process Routing page perform the same function as the "Reject" and "Submit" buttons within the plan file.

Budgeting									1 1 0	a	
1 3 0 /									1000	¢.	1
COMMUNICATIONS & MARKETS								0	-		
ONE POSITION PLANNING	ROUTER OTHER LABOR	U.Mastr								3	
Paties	Subagety	Brightyne	Andy (2000) Bandgeri	August 2000 Rafiget	Bastandan (1938) Bastan	Dollar 2020 Bulget	Recordse 2020 Relige	Same and	January (1021 Badget	February 2001 Redge	

When a plan file is listed on the Labor Planning Process Summary but does not appear on the list of Labor plan files, the reason is probably that that plan file for that DeptID is blank (or contains no data.) One way to confirm this is to click on the plan file (07205 in the below example) in the Labor Planning Process Summary.

dgeting							₩ 🕸
9 ×							
Welcome Judy Allarny							
It's that time of the year againplease review your budgets b	elow and provide inputs as indicated in the plan Nes.						
Support Materials	Announcements					Lab	or Planning Process Summary
Kaufman Hall						0	
UD Budget Office						2	Total
						2.8	ew.
							DE COMMENSATIONS & MARKETINE
						-	
						/	
BUDDETING LABOR PLANNING							
BLOGETING LABOR PLANNING				Step	/		
BLODETING LABOR PLANNING Dept Level 4	Dept	Dept ID	1	Bep 2	/	1 Halas	
BLODETING LADOR PLANNING Dept Level 4 3 Of FLOC OF THE PROVIDET	Dept OFCIDETHE PROVIDET	Dept ID	1	2	/	8 Salue E O Labor Plan Review	
BLODETINS LABOR PLANNING Dept Level 4 G* OFFICE OF THE PROVIDET G* EARTH OCCAN & DRVIECHMENT	Dept DFC DF THE PROVIDET COL, EARTH OCEAN & ENVIRONMENT	Dept KD choch conten conten	-	2 1 2 1		1 Status E O Labor Plan Review E O Labor Plan Review	

In the upper right-hand corner of the Process Step page, you can click on "open plan file"

Budgeting		III 🛷 🥭 👜 🛛 🚛
≣ 9		\$ \$
PHOTOGRAPHIC SERVICES		nçen yüse tür
3 Labor Plan Approval Revious	2 Labor Plan Review Current Next	
At Tapa At Process Actory		
Dati	Data's Defails	Days in Exer

The labor plan file will open up but will have no data.

Budgeting							ii 🗸 1	2 🖷		KIGM
1981									Ŷ	7
PHOTOGRAPHIC SERVICES Lab							Report	-		
CHERNEN POSITION PLANNING	ROSTER OTHER LARCH	E.AMARANY								-
Paster	Company	Brainpert	July 2022 Budget	August 2020 Budget	Registration 2020 Redget	Detakor 2020 Badget	Research of Strength	-	Redget	200
TOTAL BALANES TOTAL BENEFITS			89 80							

If you do need to enter data into this particular plan file for budgeting, you will need to contact the central Budget Office and request a "penny plug" for this plan file. See the "penny plug" comments earlier in this document.

Another possible Labor Home Page situation is when a Labor plan file is listed on the Home Screen, but does not appear in the Labor Planning Process Summary.

Jupport Materials	Announcements						Laton Planning Process due
pufman Hall b Budget Office							2 Total
							2 New исторя (сонимонсклония в малист) исторя (синоторяалист резилоте)
RUGETING LARCE PLANSING					/	>	
BLOGETING LANCE PLANNING Digit Level 4	Dept	Dept ID		Blap 3		/ -	204
BLOOKTING Dept.Level 4 CF OFFICE OF THE PROVOST	Breat OFC OF THE PROVOST	Dept ID	/	Day 3	-	~	Status O Lubor Plan Revine
BLOOKTING Dept.Level 4 CP OFFICE OF THE PROVOST CP EARTH OCEAN & DWYRDMAIDNT	Breat Orig of the Priovost Ool Earth Octan & Environment	0vpt 10 01001 03501	/	Shep 3		/	Status O Labor Plan Review O Labor Plan Review

If you click on any of these Labor Planning files, you will get an error message that states "you do not have read access" and the file will not open. You can then click on the "back" arrow in your browser to get back to the Home Page.

There are a few possible reasons why the user would see these plan files on the home page that are not a part of the Labor Planning Process Summary:

1. You have the "View All Purpose Codes" role within Axiom - Users in this role have read access to all GL data and all Budget data.

2. The Dept ID's listed are currently (or at some point in recent history) allocating a portion of an employee(s) to your College/Unit or in Axiom-speak, a "Shared Position"

If you click on the "Total" or "New" areas on the Labor Planning Process Summary, the system will take you to the **Labor Planning Process**:



Labor Planning Process (aka Process Directory)

This is another area for the user to manage their labor plan files. The "check mark" and "x" icons also preform the approve and reject functionality.

udgeti	ing							
T								
ab		Planning Proc	ess i total tasks 15 new 0 due soon	0 overdue				
Action	15	PLANFILE †	Description	Process State	Current Step	Step Owner	Due Date	Status Details
0	۲	d02901	EDUCATION	Active	2 - Labor Plan Review	Rachel Mroz (ra)	(no due date)	Active 1 day
0	۲	d02904	PROF DEV CTR FOR EDUCATR(POCE)	Active	2 - Labor Plan Review	Rachel Mroz (m)	(no due date)	Active 1 day
0	0	d02905	OFC EDUCATIONAL TECHNOLOGY	Active	2 - Labor Plan Review	Rachel Mroz (m)	(no due date)	Active 1 day
0	0	802922	SCHOOL OF EDUCATION	Active	2 - Labor Plan Review	Rachel Mroz (m)	(no due date)	Active 1 day
0	۲	d02923	DE ACADEMY SCHOOL LEADERSHP	Active	2 - Labor Plan Review	Rachel Mroz (m)	(no due date)	Active 1 day
0	0	d02947	DE CTR FOR TEACHER EDUCATION	Active	2 - Labor Plan Review	Rachel Mroz (m)	(no due date)	Active 1 day
0	0	d02971	THE COLLEGE SCHOOL- EDUCATION	Active	2 - Labor Plan Review	Rachel Mroz (m)	(no due date)	Active 1 day
0	۲	d02976	DE EDUC RESEARCH & DEVELOP CTR	Active	2 - Labor Plan Review	Rachel Mroz (m)	(no due date)	Active 1 day
0	۲	d03320	HUMAN OVLPMNT & FAMILY SCIENCE	Active	2 - Labor Plan Review	Rachel Meoz (m)	(no due date)	Active 1 day
0	0	d03326	LAB PRESCHOOL	Active	2 - Labor Plan Review	Rachel Mroz (m)	(no due date)	Active 1 day

Workflow for Budgeting Plan Files

Workflow is the routing of plan files for review and approval. When you log into Axiom, the home page will provide information about your role and the status of your workflow.

The default home page initially lands on the Budgeting tab. Again, best practice is to complete the work on the Labor plan files before moving on to the Budgeting plan files.

Important Note: Budgeting and Labor Planning are separate processes and require that each DeptID be submitted/approved in Workflow in <u>both areas.</u> In other words, each DeptID needs to be approved both in Budgeting <u>AND</u> Labor Planning.

197									
Websere Doug Benet It's that time of the year againplease review your budgets bel	sw and provide inputs as indicated in the plan files.								
Support Materials	Announcementa								Budgeting Process Summary
Kaufman Hall UD Budget Office									3 Total
									3 New destriptions investig ansaction of story the web sectors destription (control preference, tech) revelue
ROOCTING LABOR PLANNING				_		_			
BLOOTING LABOR PLANENT		201			Bay			-	
BLOOTING LADOR PLANAMO Digit Lanal & C or Co The PRESIDENT	Deat or of the Messoout	Deget ED		2	Day 3	4		Status O College / Dr	n byud
REDORTING LADOR PLANMED Dept Level 4 Ø onc of the PERSONN Ø voc Preci & Iloniting, Counsol	Breat Onc of the President VF & Official Coderals	Deget 10 00101 00103		2	3	4	1	Status O Soliege / Do	R Figuré A figuré
BLOOKTING LADOK IPLANNING Port Lowel 4. 67 Orc Of Trict, PRESIDENT 67 YICK PRES 4. IDENTIAN. COLUMNS. 67 YICK PRES 4. IDENTIAN. COLUMNS. 67 YICK PRES 4. IDENTIAN.	Breaf Oric of The Presolant VP & Otherina, cockrete Advocative Decimiter adminity	Dept 10 00101 00103 00104	- 1	1	3	4		Status O College / Un O College / Un O College / Un	R Ingul R Aguntad Ind
BLOOKTING LADOK PLANNING Dept Lowell 8 IF once of the Plansace IF year mell & instructure counters. IF year mell & instructure counters. IF year mell & instructure counters. IF that ar onnect	Devel Or C of Triel Pressonnt VP & Otherinal, COLANIEL UNIVERSITY DEVEloCT ANTIALTIN TITLL OR OFFICE	Depart 60 001101 001103 001104 001104 001104		2	30g 2 1 1 1 1	4		Status O College / Un O College / Un O Pier Congle O Pier Congle	t Ingul 1 Agentina Ingi Ingi Ingi
BLOOK ITMO SLADOK ITULANNIHI Destitioner & If onc of the Presision Voic Presis tomotive, convoice. If voic Presis tomotive, convoice. If voic Presis tomotive, convoice. If voic Presis tomotive. If voic Presis tomotive. If voic Presis tomotive.	Presi Oric Or The Pressount VP & Orientiau Columbia Management Destinger Hartschne Stifte Orientice Oric Orienticestry Scientifiaan	Deat 60 00111 001124 00114 00114 00116			3 3 8 9 9 9 9	4		Datas © College / Un © College / Un © Plan Comple © Plan Comple © Indiget Office	t Ingust 11 Agentesia Andi Andi Agentesia Agentesia

Budgeting Process Summary

Budgeting Process Summary
14 _{Total}
14 New d02904 (PROF DEV CTR FOR EDUCATR(PDCE)) d02905 (OFC EDUCATIONAL TECHNOLOGY) d02922 (SCHOOL OF EDUCATION) d02923 (DE ACADEMY SCHOOL LEADERSHP) d02947 (DE CTR FOR TEACHER EDUCATION) d02971 (THE COLLEGE SCHOOL-EDUCATION) d02976 (DE EDUC RESEARCH & DEVELOP CTR) d03320 (HUMAN DVLPMNT & FAMILY SCIENCE)

The **Budgeting Process Summary** (upper right side of the Labor home page) lists those Labor Plan files (maximum of 15 can be viewed on the list) that are awaiting action. The options that the user has for these plan files are:

- 1. Enter/update data in the plan file
- 2. Approve (or push) to the next step in the workflow process
- 3. Reject the plan file which sends the file back to the previous user

Clicking on a plan file name from this list will bring up the **Process Routing** page for that particular plan file. The Process Routing page shows the process status, history, and details for the selected plan file.

Budgeting	Process Summary
14 ™	tal
14 New d02904 (PROF d02905 (OFC E d02922 (SCHO	DEV CTR FOR EDUCATR(PDCE)) DUCATIONAL TECHNOLOGY) OL OF EDUCATION)
d02947 (DE CT d02971 (THE C d02976 (DE ED d03320 (HUMA	R FOR TEACHER EDUCATION) COLLEGE SCHOOL-EDUCATION) UC RESEARCH & DEVELOP CTR) NN DVLPMNT & FAMILY SCIENCE)

CHOO)2922 - SCH	IOOL OF EDUCATION]		
3 Colle Appr Previous	ege / Unit oval	Current	e / Unit Input	APPROVE 3 College / Unit Approval Next
All Steps	All Process Activity			
All Steps	All Process Activity Step	Status	Details	
All Steps	All Process Activity Step Dept Input	Status Skipped	Details Skipped on 4/3/202	20
All Steps	All Process Activity Step Dept Input College / Unit Input	Status Skipped Active	Details Skipped on 4/3/202 Assigned to Rachel	20 I Mroz
All Steps	All Process Activity Step Dept Input College / Unit Input College / Unit Approval	Status Skipped Active Not Started	Details Skipped on 4/3/202 Assigned to Rachel Rachel Mroz,Gary H	20 I Mroz Henry
All Steps	All Process Activity Step Dept Input College / Unit Input College / Unit Approval Budget Office Approval	Skipped Active Not Started Not Started	Details Skipped on 4/3/202 Assigned to Rachel Rachel Mroz,Gary H Raymond Pallading	20 I Mroz Henry

Process Routing (aka Routing Page)

The actions that can be taken from the Process Routing page are to Reject, Approve or Open Plan File.

SC	HOC 22 - SCH	OL OF EDUCATION			Open Plan File
Pr	Colle Appr evious	ege / Unit roval	r 2 College Current	e / Unit Input	hit
	Steps [Step	Status	Details	Days in Step
0	11	Dept Input	Skipped	Skipped on 4/3/2020	0
	2	College / Unit Input	Active	Assigned to Rachel Mroz	4
	3	College / Unit Approval	Not Started	Rachel Mroz,Gary Henry	
	4	Budget Office Approval	Not Started	Raymond Palladino	
	5	Plan Completed	Not Started	Brian Sakiewicz, John Poehlmann, Lionel Gilibert	

Currently most plan files will start out in Workflow Step 2. Step 1 is skipped. Step 1 will only be used when it makes sense to start workflow at a lower (i.e. Department) level.

SCHOO d02922 - SCH	OL OF EDUCATION		
3 Colle Appr Previous	ege / chit oval	2 College Current	e / Unit Input
All Steps	All Process Activity		
	Step	Status	Details
0	Dept Input	Skipped	Skipped on 4/3/2020
2	College / Unit Input	Active	Assigned to Rachel Mroz
3	College / Unit Approval	Not Started	Rachel Mroz,Gary Henry
4	Budget Office Approval	Not Started	Raymond Palladino
5	Plan Completed	Not Started	Brian Sakiewicz, John Poehlmann, Lionel Gilibert

In this typical example of a College/Unit's workflow starting in Level 2, the user should ignore that the Action step shows the plan file will go to Step 3 if rejected. This is incorrect and even if you click on the reject here, it will give you an error message.

			1 4	4		AXIOM
9						÷ ?
SCHO MANFILE O	OL OF EDU	Reject PLANFILE d02922 SCHOOL OF EDUCATION		×		open plan file
3 Lat	oor Plan Approve	3 Labor Plan Approval 2 Labor Plan Rev	ew	Eat		lan Approval
					×	
All Steps	All Proc	e contains no matching element stale		OK		
Al Steps	All Proc Step	se contains no matching element etaile		ок		Days in Step
Al Steps	All Proc Step Labor Planning Labor Plan Rev	e contains no matching eilement stalla		CK		Days in Step 6
Al Stepe	All Proc Step Labor Plan Rev Labor Plan Rev Labor Plan Rev	es contains no matching element etaile 1000 silvanemens remaining		OK		Days in Step 6
Al Steps	All Proc Step Labor Planning Labor Plan Age Budget Office (e contains no matching element stale 1000 sharacters remaining	Carcal	OK		Days in Step S

If the user clicks on the "Approve" Action button, the system takes you to an intermediate step where the user can add a comment before clicking on the Approve button. The user can also at this step see the name of the owners of the next step.

Budgeting			III &	🕼 🤫	AXION
= 9				1	습 ? ?
SCHO(PLANFILE d	OL OF EDL	Approve PLANFILE d02922 SCHOOL OF EDUCATION	×	oper	ı plan file
3 Lab	or Plan Approve	2 Labor Plan Review	3 Labor Plan Approval	Labor Plan Approv	rat.
Previou	a forces acts	Approved Step	Next Step Step Owner: Rachel Mroz and Garj No due date	t	
	Step	Ť		Ca	iya in Step
0 0	Labor Planning			0	
	Labor Plan Rev	1000 descenters installing		1	
	Labor Plan App	1000 character's remaining			
	Budget Office			l.	
		and and the			

The Approve/Reject functions listed on the Process Routing page perform the same function as the "Reject" and "Submit" buttons within the plan file.

Budgeting	Budgeting								AXIOM
= % \$ }									☆ ?
10106-TITLE IX OFFICE					(Rej	ĸt	Submit	Save
OVERVIEW	BUDGET	FUND TYPE REVIEW	CONSOLIDATED SUMMARY	NARRATIVES					?

When a plan file is listed on the Planning Process Summary but does not appear on the list of Budgeting plan files, the reason is probably that that plan file for that this plan file contains no data.

Budgeting							₩ 4
= = /							
Welcome Judy Allaray It's that time of the year againplease review your budgets be	riow and provide inputs as indicated in the plan files.						
Support Materials	Announcements						Labor Planning Process Summary
Kaufman Hall UD Budget Office							2 Total
							2 New when an and a finder A such a transformer product press from a such a transformer
BUDGETING LABOR PLANNING						/	
Dept Level 4	Dapt	Dept 10	1	2	1.		Matus
C OFFICE OF THE PROVOST	OFC OF THE PROVOST	01001		1			O Labor Plan Review
C EARTH OCEAN & ENVIRONMENT	COLEARTH OCEAN & ENVIRONMENT	03501	1		8 8		O Labor Plan Review
COMMUNICATIONS & MARSETING	COMMUNICATIONS & MARKETING	67201	-				O Labor Plan Review

One way to confirm this is to click on the plan file (07205 in the below example) in the Planning Process Summary.

In the upper right-hand corner of the Process Step page, you can click on "open plan file"

Budgeting	III 🛷 🦨 💩 🗵 🖬
1.9	\$ 7
PHOTOGRAPHIC SERVICES	apan yin tik
3 Labor Plan Approval w.astr Previous Current Net	
All Timps All Presest Activity Time: Balant Confects	Cays in Step

The plan file will open up but will have no data.

Budgeting							III 🕫 🖞		
= \ • /									10
							Report	Salest	
DISTRICT POSITION PLANNING	ROSTER OTHER LARCE	E.MARANY							
Parties	Collegory	Engineers	July 2020 Bulget	August 2020 Budget	Repairies 2020 Redget	Betaker (K28) Budget	Nonetice 2020 Budget	December 2 Budget	101
TOTAL BALARES TOTAL BENEFITS					:			88 80	-

If you do need to enter data into this particular plan file for budgeting, you will need to contact the Budget Office and request a "penny plug" for this plan file. See the comments on "penny plugs" earlier in this document.

Another possible Home Page situation is when a **plan file is listed on the Home Screen, but does not appear in the Planning Process Summary**.

Support Materials	Announcements						Labor Planning Process
aufman Hall O Budget Office							2 _{Total}
							2 New attack (Downwood Town & And et al. (Downwood Town & And et al. (Downwood Townwood Beauty of a structure)
RUDGETING LABOR PLANNING						>	1
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If you click on any of these Budgeting plan files, you will get an error message that states "you do not have read access" and the file will not open. You can then click on the "back" arrow in your browser to get back to the Home Page

There are a few possible reasons why the user would see these plan files on the home page that are not a part of the Planning Process Summary:

1. You have the "View All Purpose Codes" role within Axiom - Users in this role have read access to all GL data and all Budget data.

2. The Dept ID's listed are currently (or at some point in recent history) allocating a portion of an employee(s) to your College/Unit or in other words a "Shared Position".

If you click on the "Total" or "New" areas on the Labor Planning Process Summary, the system will take you to the **Planning Process:**



Planning Process (aka Process Directory)

This is another area for the user to manage the plan files. The "check" and "x" icons preform the same "accept/approve" and "reject" functions available in the individual plan files.

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T								
ab		Planning Proc	Statel tasks 15 new 0 due soon	0 overdue				
Action	15	PLANFILE †	Description	Process State	Current Step	Step Owner	Due Date	Status Details
0	۲	d02901	EDUCATION	Active	2 - Labor Plan Review	Rachel Mroz (ra)	(no due date)	Active 1 day
0	•	d02904	PROF DEV CTR FOR EDUCATR(POCE)	Active	2 - Labor Plan Review	Rachel Mroz (m)	(no due date)	Active 1 day
0	0	d02905	OFC EDUCATIONAL TECHNOLOGY	Active	2 - Labor Plan Review	Rachel Mrcz (m)	(no due date)	Active 1 day
0	0	692922	SCHOOL OF EDUCATION	Active	2 - Labor Plan Review	Rachel Mroz (m)	(no due date)	Active 1 day
0	0	402923	DE ACADEMY SCHOOL LEADERSHP	Active	2 - Labor Plan Review	Rachel Mroz (m)	(no due date)	Active 1 day
0	0	d02947	DE CTR FOR TEACHER EDUCATION	Active	2 - Labor Plan Review	Rachel Mroz (m)	(no due date)	Active 1 day
0	0	d02971	THE COLLEGE SCHOOL- EDUCATION	Active	2 - Labor Plan Review	Rachel Mroz (m)	(no due date)	Active 1 day
0	۲	d02976	DE EDUC RESEARCH & DEVELOP CTR	Active	2 - Labor Plan Review	Rachel Mrog (m)	(no due date)	Active 1 day
0	•	d03320	HUMAN OVLPMNT & FAMILY SCIENCE	Active	2 - Labor Plan Review	Rachel Mroz (m)	(no due date)	Active 1 day
0	0	d03326	LAB PRESCHOOL	Active	2 - Labor Plan Review	Rachel Mroz (m)	(no due date)	Active 1 day

Quick Tips

In almost every case, a DeptID has both a Budgeting plan file and a Labor Planning plan file. BOTH need to be submitted & approved by the Dean/VP. i.e. there are ultimately 2 approvals needed per DeptID.

To quickly resize the screen, hold down the CTRL key while scrolling the mouse wheel

Depending on your display settings, it can sometimes be faster/easier to use the arrow keys to move around a page rather than the mouse.

When using the mouse on a web report, scrolling with the mouse wheel is sometimes limited when on the columns on the left side of the screen. If you move over to columns on the right side of the screen, the mouse wheel should work.

On the home page, you should see your initials in the upper right hand corner, confirming that you are logged in under your ID



In the Budgeting Plan file, if you click on any of the blue headings **Revenues**, **Personnel Expense**, or **Direct Expenditures**, the sub-categories below will all open up. You can click on them again to collapse them.



When you hit the check mark in a purpose code screen to flag it as reviewed, it automatically saves your work – so you don't have to hit save again when navigating to another purpose code.



• For Budgeting screens (non-labor), a quick tip to update a pre-populated budget is to use the % Adjust column first (enter "-1" for -100%) which allows you to then key in your total budget amount in the \$ Adjust column (so you don't have to manually calculate the incremental \$\$ to reach your FY22 desired budget amount

Budget Group	Budget Method	Actual 2019	Actual 2020	Actual Jun 992 YTD 2021	Budget 2021	% Through Budget	Base Budget 2022	Global % Adjust	% Adjust	\$ Adjust	Proposed Budget 2022
Revenues											
		(2,296)	(2,296)	0		0 0.	2%	0	0.0%	(2,300)	(2,300)
199700 - TRANSFERS W/I OP/NON + Add TRANSFERS IN/(OUT)	Input Adjustment	(2,296)	(2,296)	0		0 0.	2%	0 0.0%	-100.0%	-2,300	(2,300)

On the Narratives tab, the ENTER key does not seem to work in Internet Explorer, but works fine in Edge.

Appendix

UD Budget Home Page https://sites.udel.edu/budget/

Axiom System https://udel.axiom.cloud/