Initial Log-in

The only browsers that should be used to access Axiom are Internet Explorer and Microsoft Edge. Other browsers like Firefox, Chrome, and Safari are not to be used.

Web Link

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

https://udel.axiom.cloud/

Home Screen Navigation

Logging in will bring you to the home screen.

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**.

On the home screen, you will see any **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.
From the home screen, the **Budgeting** and **Labor Planning** plan files are accessible by first selecting the appropriate tab:

![Home screen with tabs for Budgeting and Labor Planning](image)

There usually are two plan files for each DeptID; one for **Labor Planning** and one for **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 automatically transmitted (at a summary level) to the appropriate Budget Plan files.

- **Budgeting** plan files
  - Used for budgeting revenue and non-compensation budgeting (expenses & transfers) at an “by Account, by Purpose Code, by DeptID” 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 responsible for budgeting. Reasons for this include “view all” access in PeopleSoft security, other PeopleSoft security settings, or salaries shared from another college/unit.

The user should focus primarily on the Process Summary list on the upper right 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 should only have access to 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 the below error message when trying to open the plan file.

![Error message](image)
**Column Headers** - To help you navigate through the plan file list, you can sort the list by clicking on the column headers (circled below). You can also use the web browser find function (CTRL-F) to search for specific text or a number.

<table>
<thead>
<tr>
<th>College or Admin Unit</th>
<th>Dept.</th>
<th>Dept ID</th>
<th>Step 1</th>
<th>Step 2</th>
<th>Step 3</th>
<th>Step 4</th>
<th>Step 5</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNIVERSITY HONORS COLLEGE</td>
<td>UNIV HONORS COLLEGE</td>
<td>01540</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>College / Unit Input</td>
</tr>
<tr>
<td>DEPUTY PROVOST</td>
<td>UNIVERSITY STUDIES</td>
<td>01245</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>College / Unit Input</td>
</tr>
<tr>
<td>DEPUTY PROVOST</td>
<td>UNDERGRAD RESEARCH PROGRAM</td>
<td>01530</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>College / Unit Input</td>
</tr>
<tr>
<td>UNIVERSITY LIBRARY</td>
<td>LIBRARY</td>
<td>01301</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>College / Unit Input</td>
</tr>
<tr>
<td>ARTS &amp; SCIENCES</td>
<td>ENGLISH LANGUAGE INSTITUTE</td>
<td>01470</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>College / Unit Input</td>
</tr>
<tr>
<td>DEPUTY PROVOST</td>
<td>OPC INTERNATIONAL STU &amp; SCHOLARS</td>
<td>01429</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>College / Unit Input</td>
</tr>
<tr>
<td>GRADUATE COLLEGE</td>
<td>GRADUATE AND PROFESSIONAL EDUC</td>
<td>01501</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>College / Unit Input</td>
</tr>
<tr>
<td>DEPUTY PROVOST</td>
<td>DEPUTY PROVOST ACADEMIC AFFAIRS</td>
<td>01530</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>College / Unit Input</td>
</tr>
</tbody>
</table>
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 2 (purple) - “College/Unit Input” is the initial starting point for most plan files. This is where Colleges & Units enter their detailed budget submission.
- Step 3 (orange) – “College/Unit Approval” is the Dean/VP review stage. Plan files in this stage can either be approved or returned to Step2 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 Step3 for action.
- Step 5 (green) – “Plan Completed” indicates plan file has been approved by the central Budget Office and is considered complete.

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- Step 1 (cyan) – “Dept Input” – This step is currently used on a limited basis where there is a significant need to start budget input at a level lower than College/Unit.

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

Overview

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:

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**: Displays 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.
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 charged to the current plan file. Shared position data cannot be updated in this plan file as the position is managed in another plan file.

By default, the **Position Planning** tab shows a rolled up by-position view, but any 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).
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**.

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:

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

- **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 <1.00 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.
• **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.

**Axiom does not automatically save user input.** To preserve changes to a plan file, the user must click 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 done via the **Position Planning** and **Other Labor** tabs.

**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.
Summary

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

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 is complete, to start entering Budgeting data select the Budgeting tab and then select the plan file off the list of plan files on the left side of the screen.

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 **all** funds (basic budget, self-supporting, reserves, endowments, faculty start-up, etc.)

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.

<table>
<thead>
<tr>
<th>OVERVIEW</th>
<th>BUDGET</th>
<th>FUND TYPE REVIEW</th>
<th>CONSOLIDATED SUMMARY</th>
<th>NARRATIVES</th>
</tr>
</thead>
</table>

2021 Budgeting

Hi Douglas,

Thanks for your input on the budget for 2021.

Process
1. Complete the fields in the Budget tab.
2. Review results in the Summary tab. Return to the Budget tab to make edits, if necessary.
3. Add notes in the Narratives tab.

Saving

The system does NOT save your inputs automatically, so click the Save button in the upper right corner of the page before moving on to another section or tab. If you have multiple categories in your budget, make sure to save your changes when you move from one category to the next.

Submitting

When you are ready to submit your budget for approval, click the Submit button.

Legend

<table>
<thead>
<tr>
<th>Historical value or calculation</th>
<th>12,345</th>
</tr>
</thead>
<tbody>
<tr>
<td>User input or updateable cell</td>
<td>$1,000</td>
</tr>
</tbody>
</table>

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.

To select a different purpose code to work on, 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.
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, select “Don’t Save.”

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

The base budget for a particular budget item is set upfront by the Budget Office (previous year actual, previous year budget, 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:
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.

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

If the user wishes to enter a proposed budget expense for a budget group that does not currently show on the screen for that particular purpose code, the Budget Office will need to do a manual adjustment.
(called a “penny plug”) in an underlying budget table. Once that is done and the plan file is refreshed, the ability to add the Proposed Budget for that item will exist.

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.

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 checked 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.

Fund Type Review

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

The **Consolidated Summary** shows the budget for that plan file, summing all purpose codes within that plan file.

<table>
<thead>
<tr>
<th>Budget Category</th>
<th>Actual 2018</th>
<th>Actual 2019</th>
<th>Revised 2020</th>
<th>Budget 2020</th>
<th>% Through Budget</th>
<th>Base Budget 2021</th>
<th>Proposed Budget 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Aid</td>
<td>256</td>
<td>(256)</td>
<td>0</td>
<td>(3,600)</td>
<td>0.0%</td>
<td>(3,600)</td>
<td>(3,600)</td>
</tr>
<tr>
<td>Other Hiring/Expense</td>
<td>(1,766,541)</td>
<td>(1,549,250)</td>
<td>(446,915)</td>
<td>(1,890,844)</td>
<td>33.3%</td>
<td>(1,890,844)</td>
<td>(1,890,844)</td>
</tr>
<tr>
<td>Contracts &amp; Grants</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>105,850</td>
<td>0.0%</td>
<td>105,850</td>
<td>105,850</td>
</tr>
<tr>
<td>Gifts</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>105,850</td>
<td>0.0%</td>
<td>105,850</td>
<td>105,850</td>
</tr>
<tr>
<td>Endowment Spending</td>
<td>366,931</td>
<td>265,077</td>
<td>133,716</td>
<td>149,644</td>
<td>22.4%</td>
<td>145,669</td>
<td>145,669</td>
</tr>
<tr>
<td>Other Investment Income</td>
<td>25,920</td>
<td>13,971</td>
<td>7,694</td>
<td>15,861</td>
<td>19.7%</td>
<td>15,861</td>
<td>15,861</td>
</tr>
<tr>
<td>Central Support Allocation</td>
<td>16,425,537</td>
<td>10,408,589</td>
<td>0</td>
<td>10,425,589</td>
<td>0.0%</td>
<td>10,425,589</td>
<td>10,425,589</td>
</tr>
<tr>
<td>Transfers-In-Out</td>
<td>(698,519)</td>
<td>(205,407)</td>
<td>(7,273)</td>
<td>(2,049)</td>
<td>20.0%</td>
<td>(2,049)</td>
<td>(2,049)</td>
</tr>
<tr>
<td>Transfers-Out (W/P)</td>
<td>(416)</td>
<td>(104,319)</td>
<td>0</td>
<td>113,333</td>
<td>0.0%</td>
<td>113,333</td>
<td>113,333</td>
</tr>
<tr>
<td>Total Revenues</td>
<td>15,312,553</td>
<td>11,624,492</td>
<td>(485,175)</td>
<td>12,139,431</td>
<td>-4.0%</td>
<td>12,094,431</td>
<td>12,094,431</td>
</tr>
<tr>
<td>Personnel Expense</td>
<td>665,276</td>
<td>621,740</td>
<td>507,672</td>
<td>103,636</td>
<td>3.3%</td>
<td>0</td>
<td>617,787</td>
</tr>
</tbody>
</table>

Narratives

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

Additional budget reports are available. Please refer to the Reporting section of this document for more information.
Reporting

To access the reports available within Axiom, click on the “hamburger” in the upper left corner of the home page.

The folders **Budgeting Reports** and **Labor Reports** contain reports that can be utilized for budgeting purposes.

**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.
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)**

<table>
<thead>
<tr>
<th>Budget Fund Type</th>
<th>Budget Group</th>
<th>Budget 2020</th>
<th>Proposed Budget 2021</th>
<th>Variance</th>
<th>Basic Budget</th>
<th>Self-Supporting</th>
<th>Allocated</th>
<th>Startup</th>
<th>Service Centers</th>
<th>Gifts</th>
<th>Endowment Income</th>
<th>State Restricted Appropriation</th>
<th>Externally Sponsored Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenues</td>
<td>UNDERGRAD TUITION &amp; FEES</td>
<td>502,314,651</td>
<td>502,314,651</td>
<td>0.0%</td>
<td>501,605,216</td>
<td>709,435</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>STUDENT AID</td>
<td>(127,546,066)</td>
<td>(127,625,066)</td>
<td>0.0%</td>
<td>(105,299,455)</td>
<td>(56,314)</td>
<td>(467,785)</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>(2,358,956)</td>
</tr>
<tr>
<td>Contra-Revenues</td>
<td>GRADUATE TUITION &amp; FEES</td>
<td>509,252,805</td>
<td>109,218,636</td>
<td>0.0%</td>
<td>509,218,636</td>
<td>34,169</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Contra-Revenues</td>
<td>GRAD TUTION EXPENSE</td>
<td>(75,610,540)</td>
<td>(75,610,540)</td>
<td>0.0%</td>
<td>(70,543,347)</td>
<td>(504,844)</td>
<td>(915,927)</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Revenues</td>
<td>OTHER TUITION &amp; FEES</td>
<td>74,135,193</td>
<td>74,042,193</td>
<td>0.1%</td>
<td>35,728,504</td>
<td>38,299,789</td>
<td>13,900</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Revenues</td>
<td>STATE UNRESTRICTED APPROP</td>
<td>94,924,100</td>
<td>94,924,100</td>
<td>0.0%</td>
<td>94,924,100</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

**Excel (formatted report)**

<table>
<thead>
<tr>
<th>Budget Fund Type</th>
<th>Budget Group</th>
<th>Budget 2020</th>
<th>Proposed Budget 2021</th>
<th>Variance</th>
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<th>Self-Supporting</th>
<th>Allocated</th>
<th>Startup</th>
<th>Service Centers</th>
<th>Gifts</th>
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<tr>
<td>Revenues</td>
<td>UNDERGRAD TUITION &amp; FEES</td>
<td>502,314,651</td>
<td>502,314,651</td>
<td>0.0%</td>
<td>501,605,216</td>
<td>709,435</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>STUDENT AID</td>
<td>(127,546,066)</td>
<td>(127,625,066)</td>
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<td>(56,314)</td>
<td>(467,785)</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>(2,358,956)</td>
</tr>
<tr>
<td>GRADUATE TUITION &amp; FEES</td>
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<td>109,218,636</td>
<td>0.0%</td>
<td>109,218,636</td>
<td>34,169</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>GRAD TUTION EXPENSE</td>
<td>(75,610,540)</td>
<td>(75,610,540)</td>
<td>0.0%</td>
<td>(70,543,347)</td>
<td>(504,844)</td>
<td>(915,927)</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>(741,317)</td>
</tr>
<tr>
<td>OTHER TUITION &amp; FEES</td>
<td>74,135,193</td>
<td>74,042,193</td>
<td>0.1%</td>
<td>35,728,504</td>
<td>38,299,789</td>
<td>13,900</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>STATE UNRESTRICTED APPROP</td>
<td>94,924,100</td>
<td>94,924,100</td>
<td>0.0%</td>
<td>94,924,100</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>FEDERAL APROPRIATIONS</td>
<td>3,111,149</td>
<td>3,111,149</td>
<td>0.0%</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

**Print to PDF**

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).
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.

**Labor Reports / Labor Distribution to Budget Tie-Out Report**

The 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 another 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
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 should only be used to reconcile one plan file at a time.

**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)
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.

**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 can be shown on this 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 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 it the decision is made to start workflow at a lower (i.e. 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.
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.

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.

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

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

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. This is something done “behind the scenes” in the central Budget Office that will enable you to open the plan file.

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.

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” and “x” icons also preform the approve and reject functionality.

![Labor Planning Process Summary](image)
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.**

Budgeting Process Summary

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.

<table>
<thead>
<tr>
<th>Budgeting Process Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>14</strong> Total</td>
</tr>
<tr>
<td>14 New</td>
</tr>
<tr>
<td>d02904 (PROF DEV CTR FOR EDUCATR(PDCE))</td>
</tr>
<tr>
<td>d02905 (OFC EDUCATIONAL TECHNOLOGY)</td>
</tr>
<tr>
<td><strong>d02922 (SCHOOL OF EDUCATION)</strong></td>
</tr>
<tr>
<td>d02925 (EDUCATION &amp; LEADERSHIP)</td>
</tr>
<tr>
<td>d02947 (DE CTR FOR TEACHER EDUCATION)</td>
</tr>
<tr>
<td>d02971 (THE COLLEGE SCHOOL-EDUCATION)</td>
</tr>
<tr>
<td>d02976 (DE EDUC RESEARCH &amp; DEVELOP CTR)</td>
</tr>
<tr>
<td>d03320 (HUMAN DLPMNT &amp; FAMILY SCIENCE)</td>
</tr>
</tbody>
</table>

**SCHOOL OF EDUCATION**

<table>
<thead>
<tr>
<th>College / Unit Approval</th>
<th>College / Unit Input</th>
<th>College / Unit Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Previous</strong></td>
<td><strong>Current</strong></td>
<td><strong>Next</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Status</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Dept Input</td>
<td>Skipped</td>
</tr>
<tr>
<td>2</td>
<td>College / Unit Input</td>
<td>Active</td>
</tr>
<tr>
<td>3</td>
<td>College / Unit Approval</td>
<td>Not Started</td>
</tr>
<tr>
<td>4</td>
<td>Budget Office Approval</td>
<td>Not Started</td>
</tr>
<tr>
<td>5</td>
<td>Plan Completed</td>
<td>Not Started</td>
</tr>
</tbody>
</table>

**Process Routing (aka Routing Page)**

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

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.
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.

The Approve/Reject functions listed on the Process Routing page perform the same function as the “Reject” and “Submit” buttons within the plan file.
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 contains no data.

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”.

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

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. This is something done “behind the scenes” that will enable you to open the plan file.

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.
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:

<table>
<thead>
<tr>
<th>Dept Level 4</th>
<th>Dept ID</th>
<th>Dept Name</th>
<th>Budget</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>OFFICE OF THE PROVOST</td>
<td>02900</td>
<td>OFFICE OF THE PROVOST</td>
<td>$10000</td>
<td>Labor Plan Review</td>
</tr>
<tr>
<td>EARTH OCEAN &amp; ENVIRONMENT</td>
<td>02920</td>
<td>COMMUNICATIONS &amp; MARKETING</td>
<td>$20000</td>
<td>Labor Plan Review</td>
</tr>
<tr>
<td>COMMUNICATIONS &amp; MARKETING</td>
<td>02921</td>
<td>COMMUNICATIONS &amp; MARKETING</td>
<td>$15000</td>
<td>Labor Plan Review</td>
</tr>
</tbody>
</table>

Labor Planning Process Summary

Total: 15

New:
- d02900 (PROF DEV CTR FOR EDUCATION)
- d02905 (OFED EDUCATIONAL TECHNOLOGY)
- d02922 (SCHOOL OF EDUCATION)
- d02923 (DE ACADEMY SCHOOL LEADERSHIP)
- d02947 (DE CTR FOR TEACHER EDUCATION)
- d02971 (THE COLLEGE SCHOOL-EDUCATION)
- d02976 (DE EDUC RESEARCH & DEVELOP CTR)
- d03020 (HUMAN DVLPMT & FAMILY SCIENCE)
- d03226 (LAB PRESCHOOL)
- d07201 (ED & HUM DEV - OFC OF DEAN)
Planning Process (aka Process Directory)
This is another area for the user to manage the plan files. The “check” and “x” icons perform the same “accept/approve” and “reject” functions available in the individual plan files.

<table>
<thead>
<tr>
<th>Actions</th>
<th>PLANFILE</th>
<th>Description</th>
<th>Process State</th>
<th>Current Step</th>
<th>Step Owner</th>
<th>Due Date</th>
<th>Status/Details</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>d02761</td>
<td>EDUCATION</td>
<td>Active</td>
<td>2 - Labor Plan Review</td>
<td>Rachel Mroz (ms)</td>
<td>(no due date)</td>
<td>Active 1 day</td>
</tr>
<tr>
<td></td>
<td>d02764</td>
<td>PROF DEV CTR FOR EDUCATION</td>
<td>Active</td>
<td>2 - Labor Plan Review</td>
<td>Rachel Mroz (ms)</td>
<td>(no due date)</td>
<td>Active 1 day</td>
</tr>
<tr>
<td></td>
<td>d02765</td>
<td>OPC EDUCATIONAL TECHNOLOGY</td>
<td>Active</td>
<td>2 - Labor Plan Review</td>
<td>Rachel Mroz (ms)</td>
<td>(no due date)</td>
<td>Active 1 day</td>
</tr>
<tr>
<td></td>
<td>d02763</td>
<td>SCHOOL OF EDUCATION</td>
<td>Active</td>
<td>2 - Labor Plan Review</td>
<td>Rachel Mroz (ms)</td>
<td>(no due date)</td>
<td>Active 1 day</td>
</tr>
<tr>
<td></td>
<td>d02762</td>
<td>DE ACADEMY SCHOOL LEADERSHIP</td>
<td>Active</td>
<td>2 - Labor Plan Review</td>
<td>Rachel Mroz (ms)</td>
<td>(no due date)</td>
<td>Active 1 day</td>
</tr>
<tr>
<td></td>
<td>d02747</td>
<td>DC CTR FOR TEACHER EDUCATION</td>
<td>Active</td>
<td>2 - Labor Plan Review</td>
<td>Rachel Mroz (ms)</td>
<td>(no due date)</td>
<td>Active 1 day</td>
</tr>
<tr>
<td></td>
<td>d02711</td>
<td>THE COLLEGE SCHOOL EDUCATION</td>
<td>Active</td>
<td>2 - Labor Plan Review</td>
<td>Rachel Mroz (ms)</td>
<td>(no due date)</td>
<td>Active 1 day</td>
</tr>
<tr>
<td></td>
<td>d02716</td>
<td>DE EDUCATION &amp; DEVELOP CTR</td>
<td>Active</td>
<td>2 - Labor Plan Review</td>
<td>Rachel Mroz (ms)</td>
<td>(no due date)</td>
<td>Active 1 day</td>
</tr>
<tr>
<td></td>
<td>d03020</td>
<td>HUMAN DEVELOPMENT &amp; FAMILY SCIENCE</td>
<td>Active</td>
<td>2 - Labor Plan Review</td>
<td>Rachel Mroz (ms)</td>
<td>(no due date)</td>
<td>Active 1 day</td>
</tr>
<tr>
<td></td>
<td>d03026</td>
<td>LAB PRESCHOOL</td>
<td>Active</td>
<td>2 - Labor Plan Review</td>
<td>Rachel Mroz (ms)</td>
<td>(no due date)</td>
<td>Active 1 day</td>
</tr>
</tbody>
</table>
**Tips**

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.

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/

**Syntellis Academy**
https://kaufmanhall.litmos.com/home/dashboard
Axiom Software Help