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Initial Log-in

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

### Desktop access requirements

The following requirements apply when accessing the Web Client on a desktop machine:

<table>
<thead>
<tr>
<th>Platform</th>
<th>Requirements</th>
</tr>
</thead>
</table>
| 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 |

### Mobile access requirements

The following requirements apply when accessing the Web Client on a mobile device:

<table>
<thead>
<tr>
<th>Platform</th>
<th>Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>iPad</td>
<td>Apple Safari for iOS, the most current and previous major versions</td>
</tr>
<tr>
<td>Android tablet</td>
<td>Google Chrome for Android, the most current and previous major versions</td>
</tr>
</tbody>
</table>

For mobile users, Web Client support is limited to viewing Axiom forms and web reports. Other Web Client features may or may not be fully usable in the mobile environment.

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.

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

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.
**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.

<table>
<thead>
<tr>
<th>College or Admin Unit</th>
<th>Dept.</th>
<th>Dept ID</th>
<th>Step</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNIVERSITY HONORS COLLEGE</td>
<td>UNIV HONORS COLLEGE</td>
<td>01440</td>
<td></td>
</tr>
<tr>
<td>DEPUTY PROVOST</td>
<td>UNIVERSITY STUDIES</td>
<td>01245</td>
<td></td>
</tr>
<tr>
<td>DEPUTY PROVOST</td>
<td>UNDERGRAD RESEARCH PROGRAM</td>
<td>01230</td>
<td></td>
</tr>
<tr>
<td>UNIVERSITY LIBRARY</td>
<td>LIBRARY</td>
<td>01031</td>
<td></td>
</tr>
<tr>
<td>ARTS &amp; SCIENCES</td>
<td>ENGLISH LANGUAGE INSTITUTE</td>
<td>01470</td>
<td></td>
</tr>
<tr>
<td>DEPUTY PROVOST</td>
<td>CPC INTERNATIONAL STUDENTS &amp; SCHOLARS</td>
<td>01420</td>
<td></td>
</tr>
<tr>
<td>GRADUATE COLLEGE</td>
<td>GRADUATE AND PROFESSIONAL EDUC</td>
<td>01601</td>
<td></td>
</tr>
<tr>
<td>DEPUTY PROVOST</td>
<td>DEPUTY PROVOST ACADEMIC AFFAIRS</td>
<td>01320</td>
<td></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 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.

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

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.
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.

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 ▶ 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 ▼ 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).
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.**

<table>
<thead>
<tr>
<th>Position: FT Post Doctoral Researcher</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category: RFUHR/STAFF</td>
</tr>
<tr>
<td>Employee: RFUHR/STAFF</td>
</tr>
<tr>
<td>July 2023: $0</td>
</tr>
<tr>
<td>Professional, Full-Time</td>
</tr>
<tr>
<td>80000001 - Academic Salaries</td>
</tr>
<tr>
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</tr>
<tr>
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<tr>
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</tr>
<tr>
<td>80000001 - Academic Salaries</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Incumbent(s): 80000001 - Academic Salaries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date: 9/4/2023</td>
</tr>
<tr>
<td>Current Salary Plan:</td>
</tr>
<tr>
<td>Contract Type: Full Time</td>
</tr>
<tr>
<td>Salary Rate: 80000001 - Academic Salaries</td>
</tr>
<tr>
<td>FTE Adj Salary Rate: 80000001 - Academic Salaries</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Shared Positions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category: RFUHR/STAFF</td>
</tr>
<tr>
<td>Employee: RFUHR/STAFF</td>
</tr>
<tr>
<td>July 2023: $0</td>
</tr>
<tr>
<td>Professional, Full-Time</td>
</tr>
<tr>
<td>80000001 - Academic Salaries</td>
</tr>
<tr>
<td>Professional, Full-Time</td>
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</tr>
<tr>
<td>Professional, Full-Time</td>
</tr>
<tr>
<td>80000001 - Academic Salaries</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Incumbent(s): 80000001 - Academic Salaries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date: 9/4/2023</td>
</tr>
<tr>
<td>Current Salary Plan:</td>
</tr>
<tr>
<td>Contract Type: Full Time</td>
</tr>
<tr>
<td>Salary Rate: 80000001 - Academic Salaries</td>
</tr>
<tr>
<td>FTE Adj Salary Rate: 80000001 - Academic Salaries</td>
</tr>
</tbody>
</table>

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 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:

![Image of Axiom interface showing comment entry](image)

**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 only achieved 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 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.

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”: 

![Budgeting Process Summary](image)
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**

- Historical value or calculation: 12,345
- User input or updateable cell: 4,280

---

**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 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.
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:

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:
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 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. **The Budget Office requires the purpose code and account number to create the penny plug.** Once that is done and the plan file is refreshed, the ability to add the Proposed Budget for that item will exist. **If you do request a “penny plug” from the Budget Office, make sure you save and exit the plan file while the Budget Office enters the “penny plug” on their end.** 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 given 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.

**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.
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.

Narratives

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

---

**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 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>
</tr>
</thead>
<tbody>
<tr>
<td>Revenues</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>
</tr>
<tr>
<td>Contra-Revenues</td>
<td>STUDENT AID</td>
<td>(127,546,066)</td>
<td>(0.0%)</td>
<td>(105,299,455)</td>
<td>(56,314)</td>
<td>(407,765)</td>
<td>-</td>
<td>-</td>
<td>(2,358,956)</td>
</tr>
<tr>
<td>Revenues</td>
<td>GRADUATE TUITION &amp; FEES</td>
<td>109,252,805</td>
<td>0.0%</td>
<td>109,218,636</td>
<td>34,169</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Contra-Revenues</td>
<td>GRAD TUITION EXPENSE</td>
<td>(76,610,540)</td>
<td>(0.0%)</td>
<td>(70,543,347)</td>
<td>(504,844)</td>
<td>(915,927)</td>
<td>-</td>
<td>-</td>
<td>(741,112)</td>
</tr>
<tr>
<td>Revenues</td>
<td>OTHER TUITION &amp; FEES</td>
<td>74,135,193</td>
<td>0.1%</td>
<td>74,042,193</td>
<td>35,728,504</td>
<td>38,299,789</td>
<td>13,900</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Revenues</td>
<td>STATE UNRESTRICTED APPROP</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>
</tr>
</tbody>
</table>

Excel (formatted report)

<table>
<thead>
<tr>
<th>Budget Fund Type</th>
<th>Budget 2020</th>
<th>Proposed Budget 2021</th>
<th>Variance</th>
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<td>94,924,100</td>
<td>0.0%</td>
<td>94,924,100</td>
<td>-</td>
<td>-</td>
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<td>-</td>
</tr>
<tr>
<td>STATE RESTRICTED APPROP</td>
<td>27,823,000</td>
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<td>0.0%</td>
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<td>-</td>
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</tr>
<tr>
<td>FEDERAL APPROPRIATIONS</td>
<td>3,111,149</td>
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<td>-</td>
<td>-</td>
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</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 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 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 is only 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 thumbback 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) 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.
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.

![Image of the approval process]

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.

![Image of the labor planning process]

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.

![Image of 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. 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.

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 Summary](image)

**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.

![Labor Planning Process](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.**

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

### 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:

- **14 New**
  - d02904 (PROF DEV CTR FOR EDUCATR(PDCE))
  - d02905 (OFC EDUCATIONAL TECHNOLOGY)
  - d02022 (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)
  - d03320 (HUMAN DVLPMNT & FAMILY SCIENCE)
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.

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### 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 for that this 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. 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.

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.
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.

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<td>Item I</td>
<td>Item J</td>
<td>Item K</td>
<td>Item L</td>
</tr>
</tbody>
</table>

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/](https://sites.udel.edu/budget/)

**Axiom System**  
[https://udel.axiom.cloud/](https://udel.axiom.cloud/)