UNT Dallas
UNIVERSITY OF NORTH TEXAS AT DALLAS

Axiom Budget Guide: FY 2027

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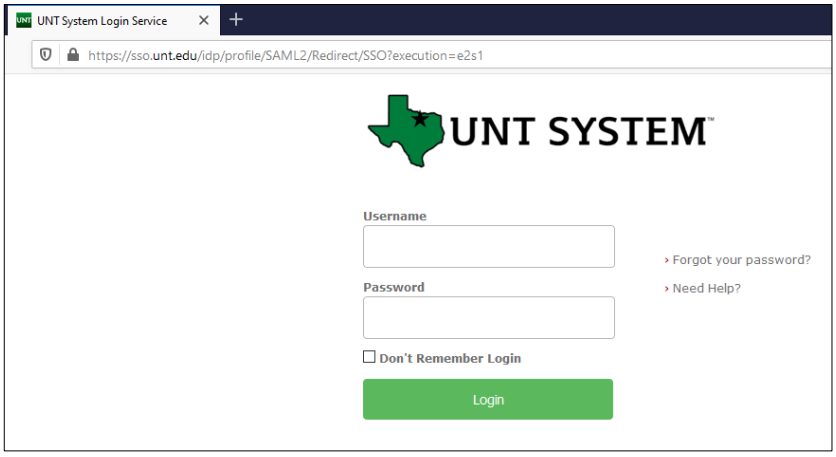
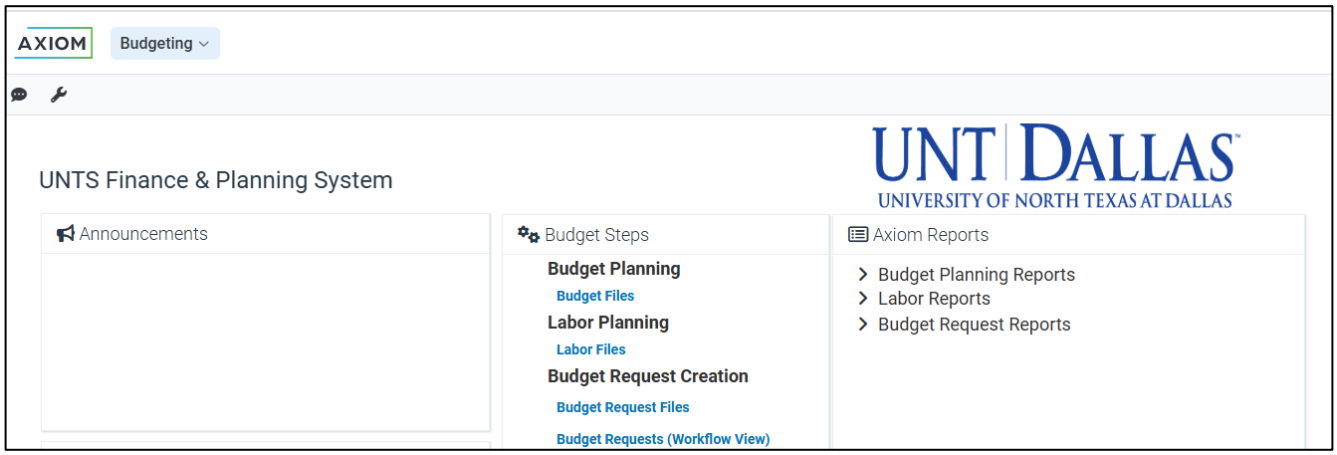
II. ACCESS THE AXIOM HOME PAGE

1. Go to the Axiom website: unt.axiom.cloud.

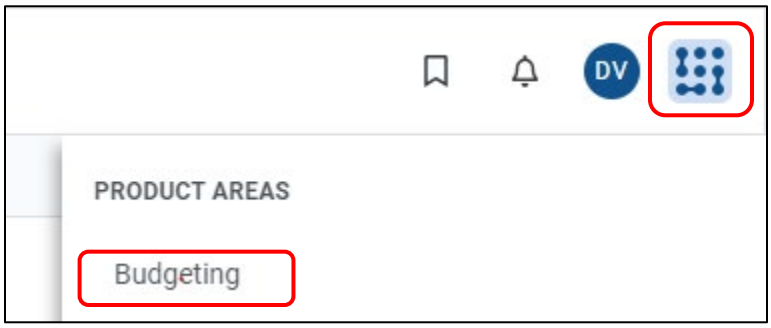
2. The UNTD single sign on screen will appear: Enter your UNTD credentials and click “Login.”



3. The Homepage will be displayed.



NOTE: To return back to the homepage, click on the tiles icon and select Budgeting (located in the top right corner of the webpage).

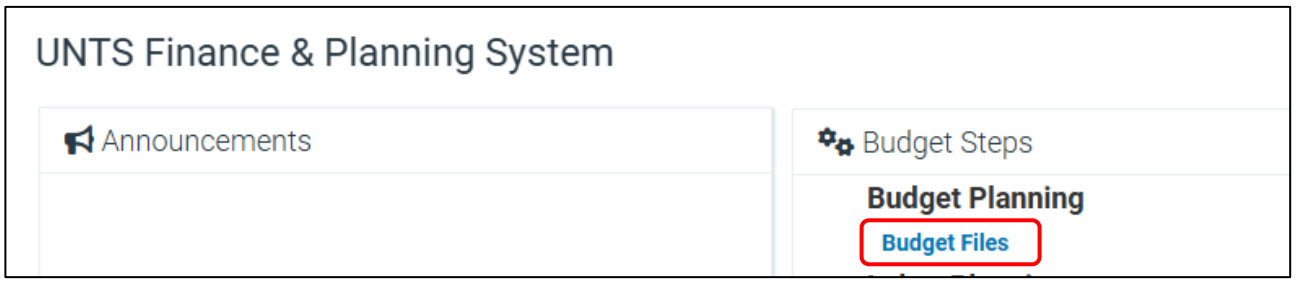


III. DESIGNATED OPERATING PLANFILE REVIEW

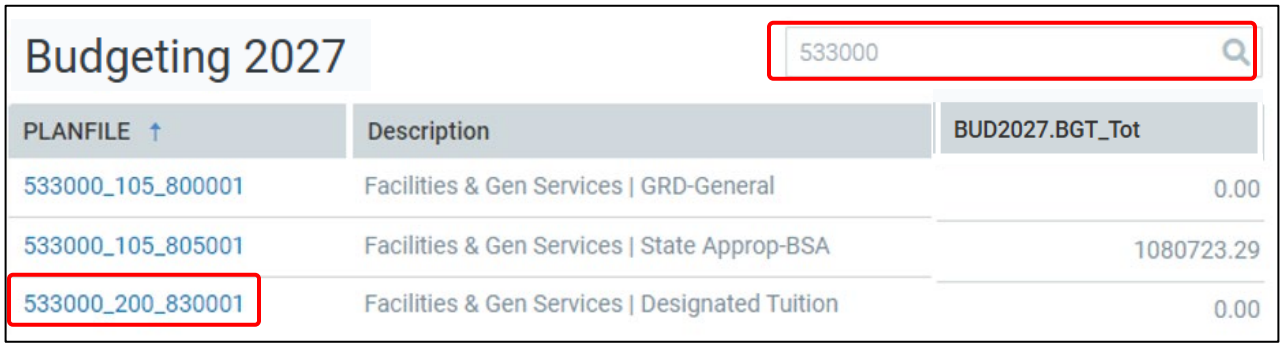
This section is to review the departmental finance activity.

Before submiting a budget request, it is important to review prior fiscal year actuals, current fiscal year budget, and year-to-date actual expenses.

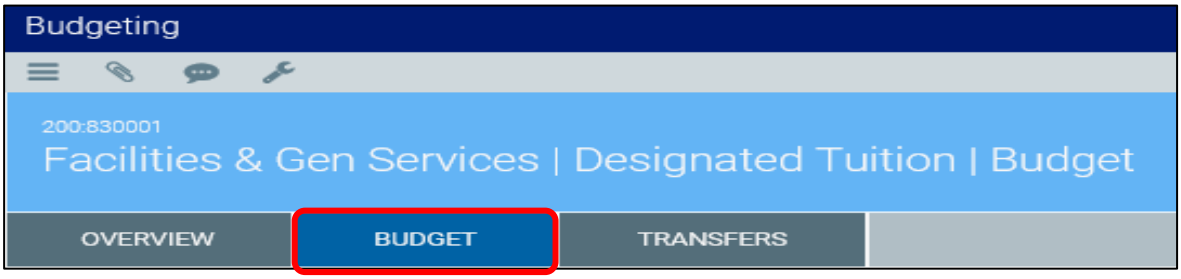
1. From the home screen, click on **Budget Files**



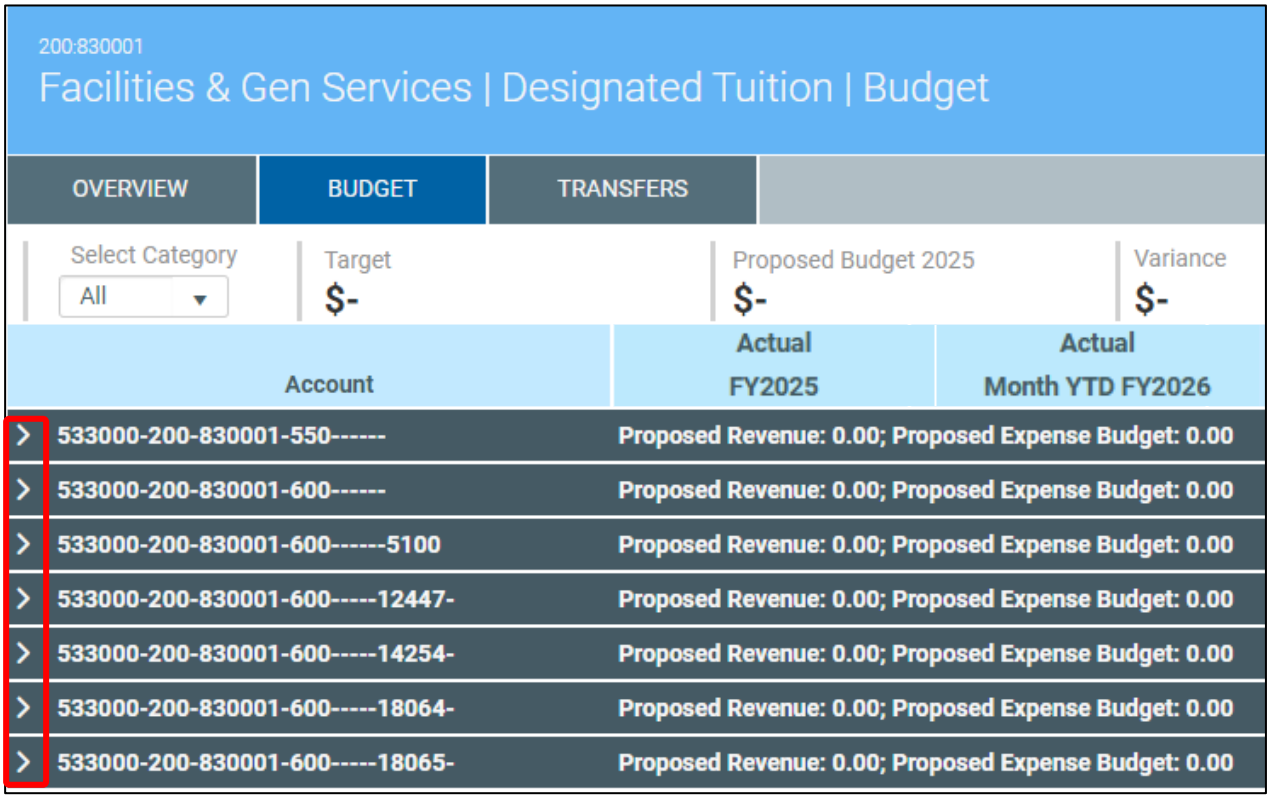
2. A new internet browser tab will appear. Budgets in Axiom are grouped by Dept_FundCat_Fund. This combination of chart fields is referred to as a **planfile**. To filter a specific department or planfile: go to the search bar and enter any part of the planfile number, the department ID or description, or the fund description, and then press enter**. Select the planfile(s) with FundCat_Fund as 200_830001.**



3. The **Budget Planning** module will open and has 3 tabs: **Overview**, **Budget**, and **Transfers**. The module will automatically default to opening on the **Budget** tab.



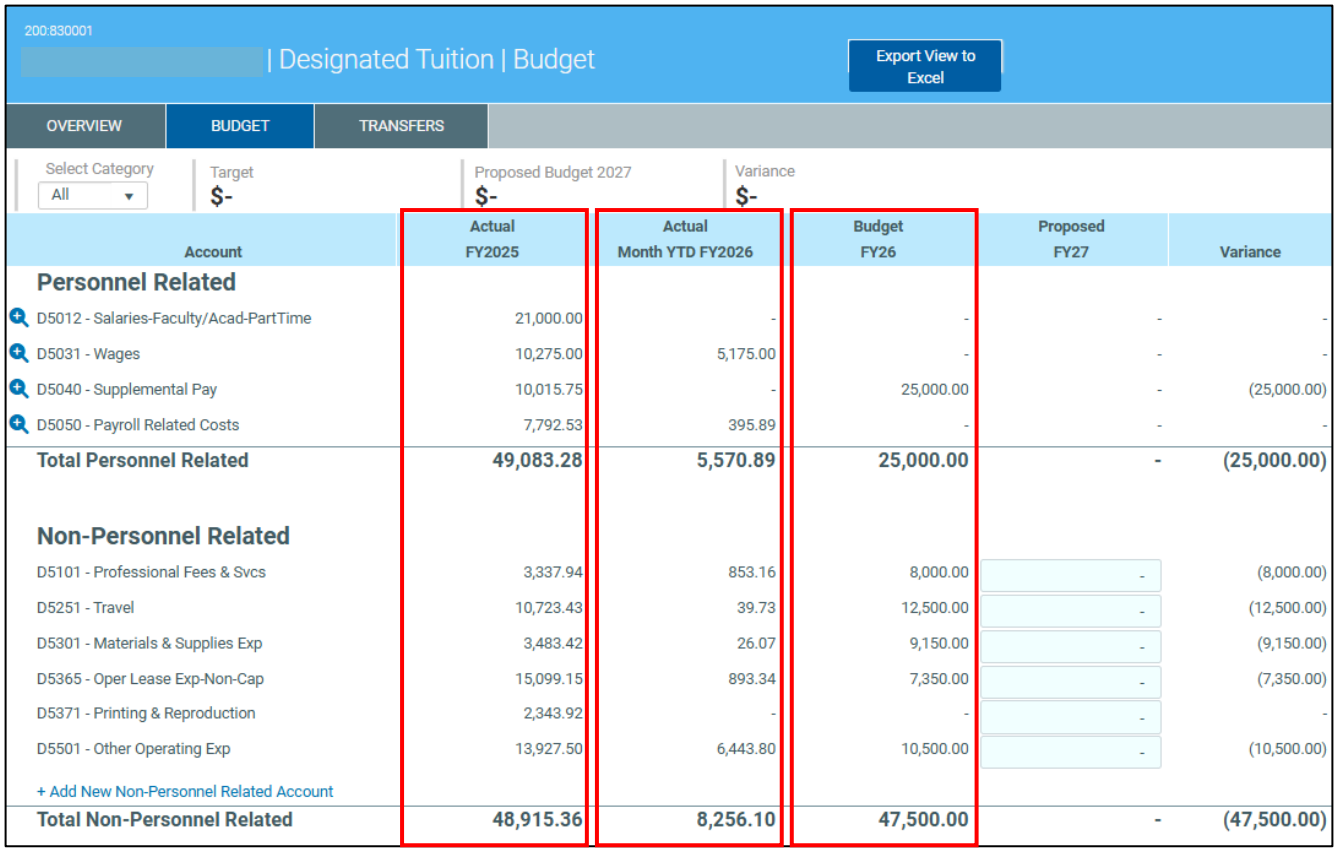
4. All chartstrings associated with the **planfile** will appear. Click on the greater than symbol next to the chartstring to view the detailed budget for that chartstring.



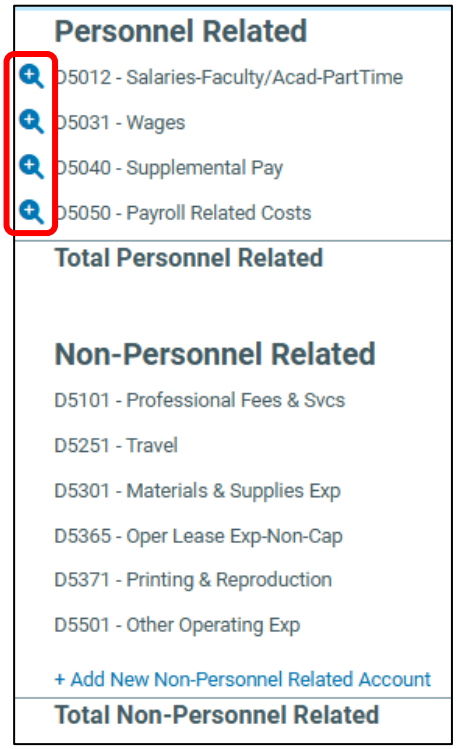
COLUMNS ON THE BUDGET TAB

Account	Actual FY2025	Actual Month YTD FY2026	Budget FY26	Proposed FY27	Variance

- **Account**: Identifies the budgetary D-account.
- **Actual FY2025**: Provides the actual revenues and expenses from FY 2025.
- **Actual Month YTD FY2026**: Provides the current year-to-date actuals.
- **Budget FY26**: FY2026 budget is equal to original budget plus permanent adjustments made during the year.
- **Proposed Budget FY2027**: This column should be ignored when reviewing planfiles on fund 830001. Due to FY2027 being a zero-based budget year.
- **Variance:** This column should be ignored when reviewing planfiles on fund 830001. This column calculates the variance between the Proposed Budget FY2027 and the FY2026 budget.



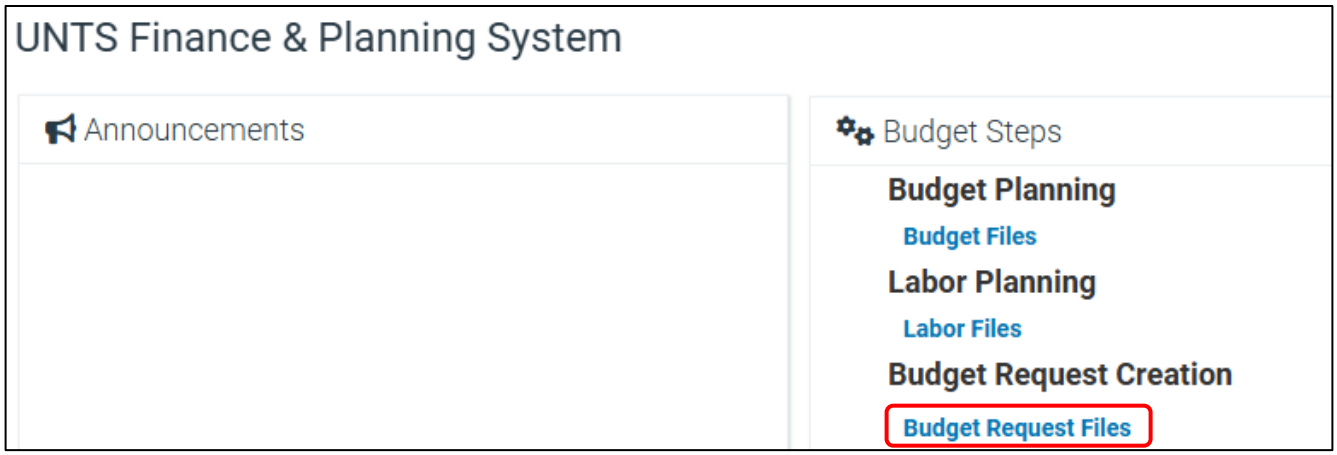
The D-accounts are categorized as Personnel and Non-Personnel. You may click on the magnifying glass next to the Personnel D-accounts to view the details. Only department approvers will have access to view the Personnel D-account details.



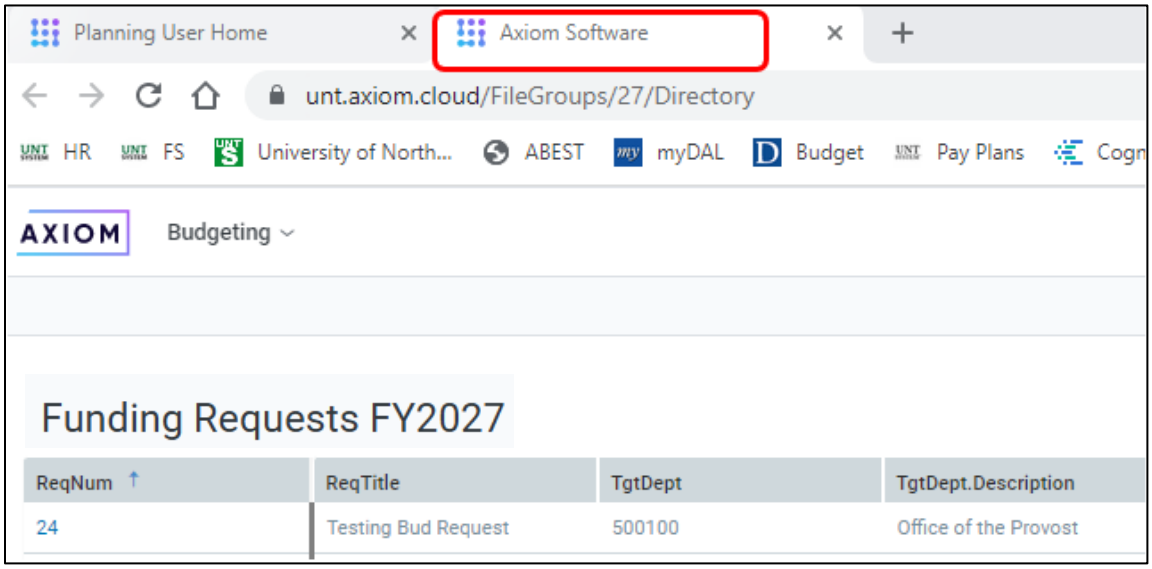
IV. BUDGET REQUEST FORMS

A. CREATE A BUDGET REQUEST FORM

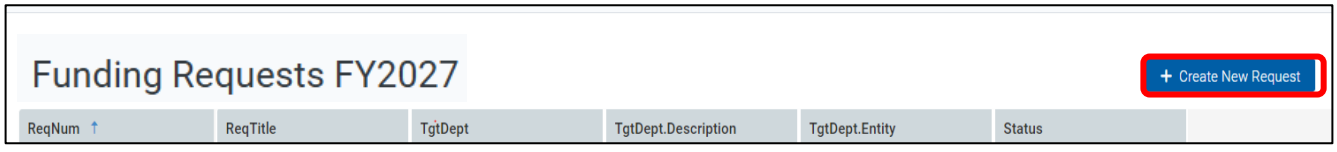
1. From the home screen, click on **Budget Request Files**.



2. A new internet browser tab will appear.

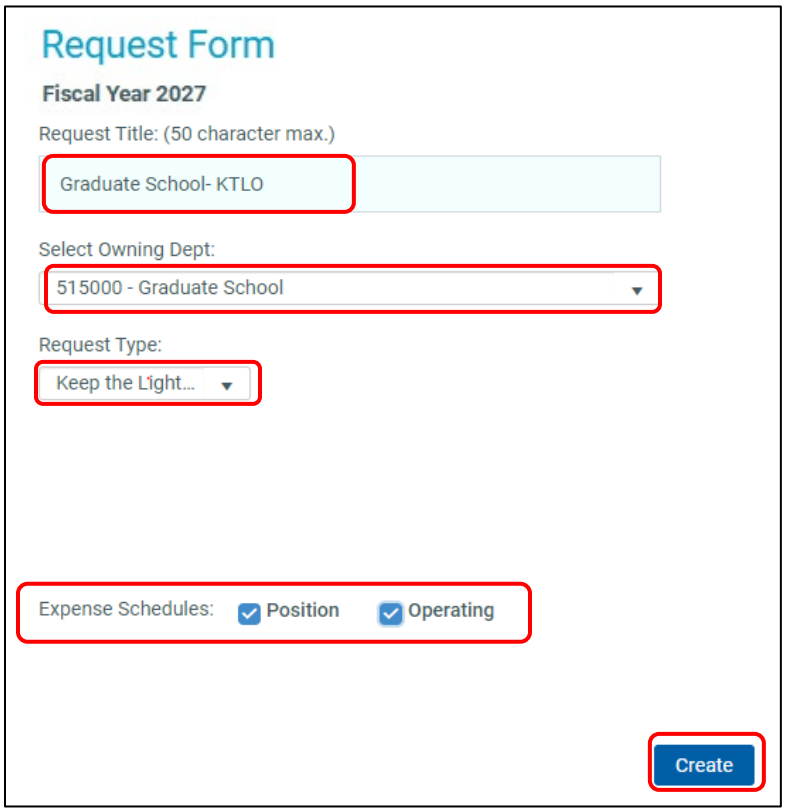


3. Click on **Create New Request** to begin the budget request form.



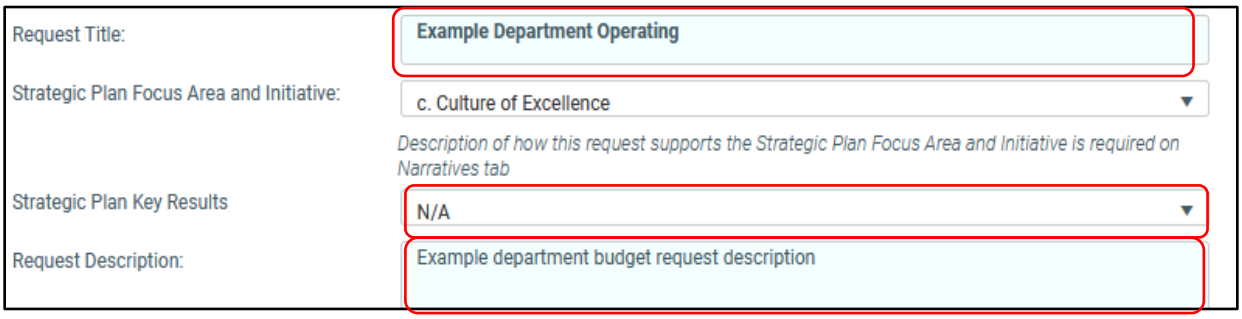
4. Enter the **Request Title** and enter the **Department.** Either key in the dept ID in the field or scroll down to the dept ID. Then select the **Request type.** Options are KTLO, SIF, and HEF. The description of each form is located on **page 4.** Select the **Expense Schedules** (Position, Operating, or both) and then click **Create**.

   The position expense schedule in Axiom should only be used for adjuncts, faculty summer assignments, task payments, and legal writing fellows. All other personnel requests should be submitted on the personnel request form described on **page 3**.

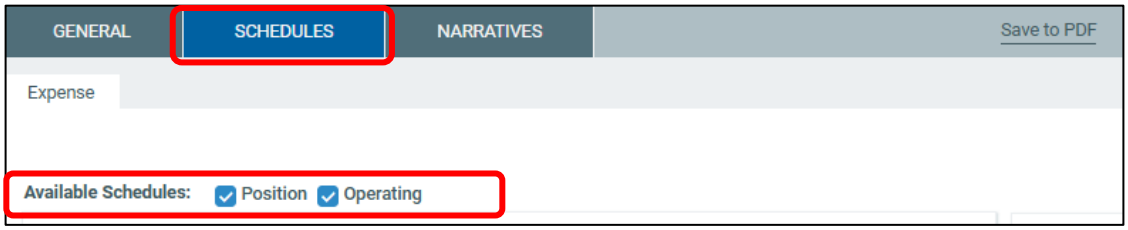


5. The Budget Request Form module will open and has 4 tabs: **General, Schedules, and Narratives**. All open fields must be completed to save and submit. The Budget Request Form module will automatically default to opening on the **General tab.**

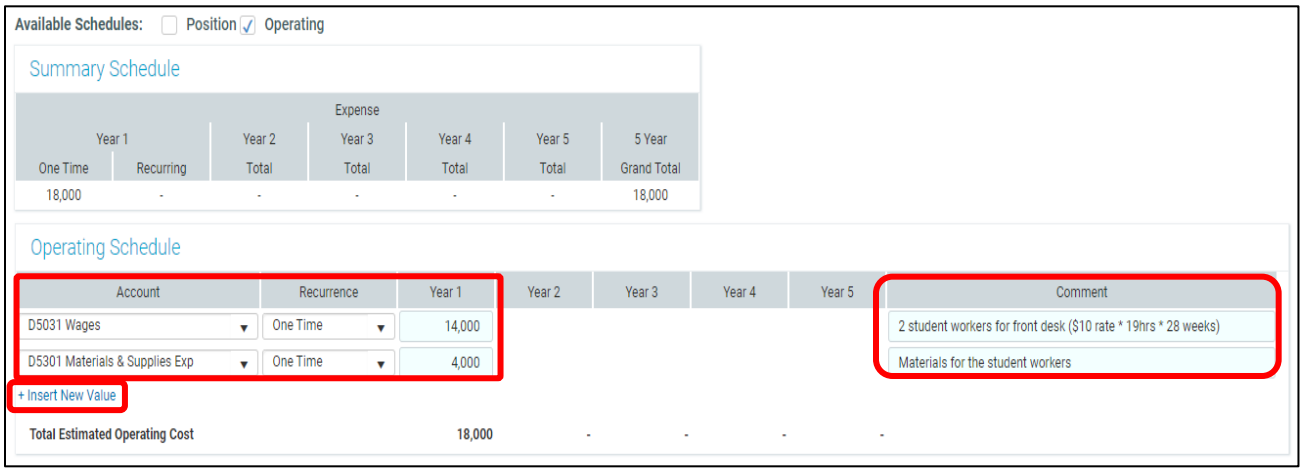
6. The **General Tab** will require the user to select one **of the five key performance indicators. To review more information of the five key performance indicators,** click here. On the **Strategic Plan Key Results** drop down**,** select N/A. Enter a detailed request description in **the Request Description** field. Users may include the chartstring the request is for in this field. Once all fields are complete, click on the **Schedules Tab**.



7. On the **Schedules Tab**, users will again have the option to select Position, Operating, or both.



8. The **Operating Schedule** is for maintenance & operations line items. Select the operating D-account and select either Recurring or One Time from the Recurrence drop down menu. Then enter the funding request amount for that account. If the item is recurring, amounts may be entered in Years 2 through 5 if applicable. To add more line items, click on + Insert New Value. Users are required to enter a comment on each line item to detail what expenses are planned for each D-account. The Total Estimated Cost will populate once amounts are entered.
   D-account selection notes: D5031-Wages is for student and other hourly workers and D5040-Supplemental Pay is for augmentations and administrative supplements for faculty who are serving as program chairs and assistant/associate Deans. For a complete list of all expenditures that roll up to the various D-accounts, reference the D-account tab of the Supplemental Information spreadsheet found here.

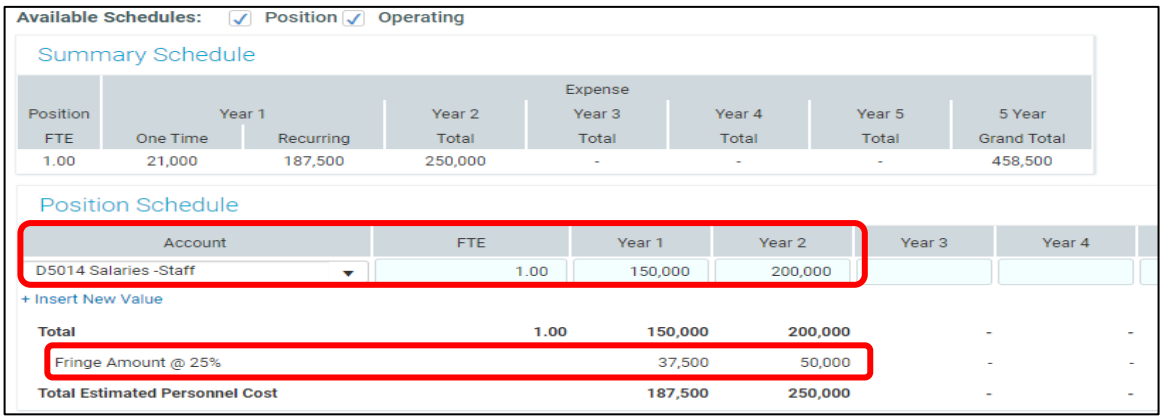


9. The **Position Schedule** should only be used for adjuncts, faculty summer assignments, task payments, and legal writing fellows. All other personnel requests should be submitted on the personnel request form described on **page 3.**

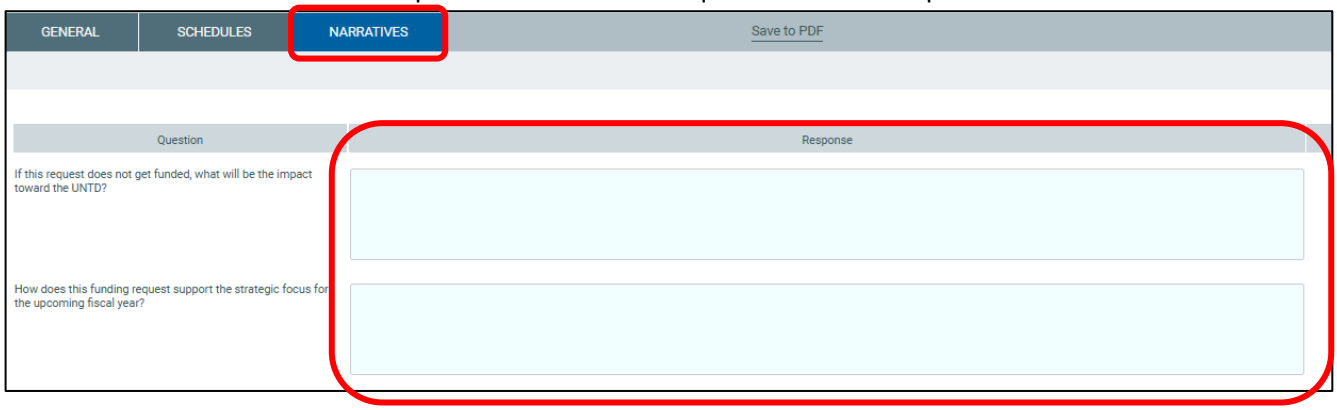
   D-account selection notes: Select D5012-Salaries-Faculty/Acad-Part Time for adjuncts and overloads, D5010-Salaries-Faculty/Academic for faculty summer assignments and faculty task payments, D5014-Salaries-Staff for staff task payments, and D5016 for legal writing positions.

   Select the personnel account, enter the FTE if applicable, and enter the Year 1 amount. If the item is recurring, amounts may be entered in Years 2 through 5. The fringe benefits will auto calculate 25% based on the salary amount. Users are required to enter comments to detail what expenses are planned for each D-account. The Total Estimated Cost will populate once amounts are entered.

   Note: If fields do not populate when the Personnel account is selected, click save then the open fields will appear.



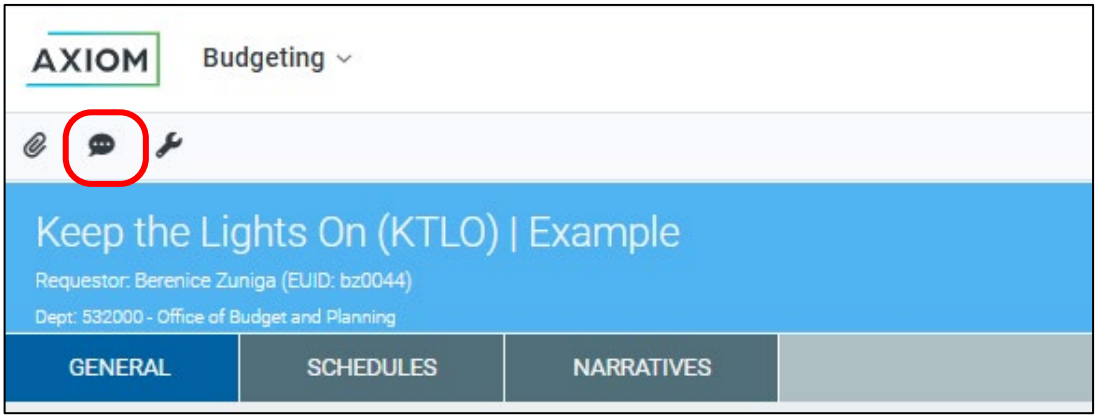
10. The **Narratives** Tab will require users to answer 2 questions in the response box.



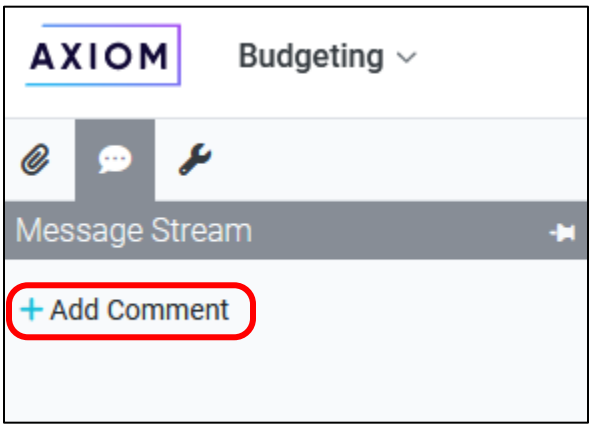
B. ADD COMMENTS & ATTACHMENTS

ADDING COMMENTS

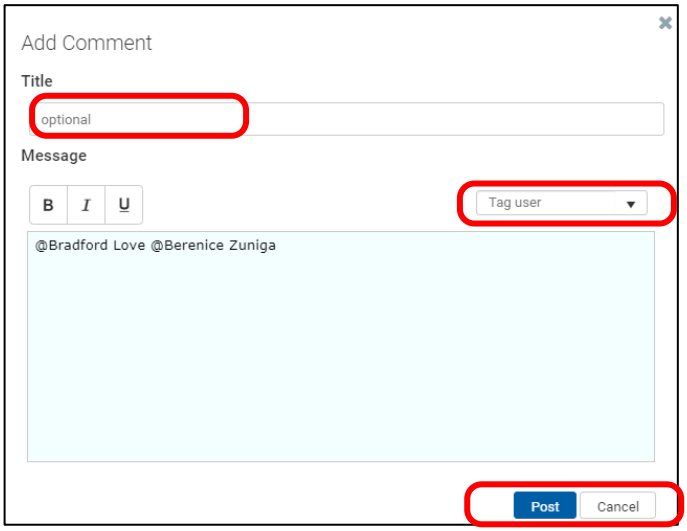
1. Users have the option to add comments to the Budget Request Forms. Please note that these are viewable by all users who have access to the department's Budget Request Forms. To add a comment, select the dialogue bubble in the upper left of the screen.



2. Users will see comments previously added along with the feature to add a new comment. The pushpin icon can be selected to link the side pane in place.



3. Select the plus sign next to 'Add Comment' and the following box will pop up on-screen. Fill in the Title and Message fields. Individual users can be tagged using the drop-down box. Users that are tagged will receive a direct message by email and in Axiom. This will include them as '@First Name Last Name' into the message. Multiple users can be tagged.



4. Once the comment is entered and complete, select the Post button. To cancel and exit the pop-up box, select the Cancel button. ***Note: Once comments are posted, they are unable to be edited or deleted.***

ADDING ATTACHMENTS

Note: Supporting detail and justification should be attached to the budget request in Axiom, especially when a budget request is significantly different from existing budget and actuals found in the budget planfiles.

1. Attachments may be added to a budget request form to provide additional detail or justification. Select the paperclip icon in the upper left of the screen.

2. The sidebar will open to reveal the list of currently attached documents along with the feature to add new attachments. If you do not see an attachment and are expecting one to be there, select the refresh icon. Refreshing may take several moments.

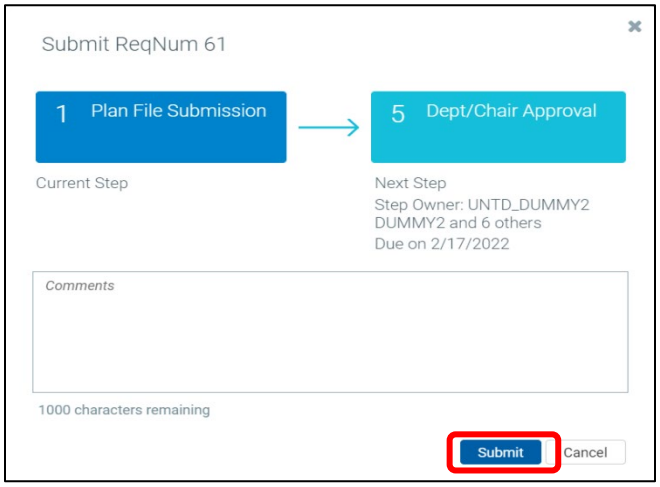
3. Select the plus sign next to 'Upload Attachment'. Navigate to and select the file for attaching and select open. The file will upload and display a brief confirmation message before appearing in the sidebar.

4. Once a file is uploaded, when you hover over it with your cursor, three options in blue will appear.
   - The Downward Facing Arrow icon will download the attachment. Depending on the browser used, this may appear at the top bar or bottom of the webpage.
   - The Notepad and Pen icon is to edit the description of the attachment.
   - The Trash Can icon will delete the attachment. A popup window will appear to confirm or cancel if your selection was not intentional.

C. SAVE AND SUBMIT TO WORKFLOW

1. Once all the tabs are complete, click **Save**. The **Submit** and **Go to Workflow** selections will populate. Click **Submit** when ready for the budget request to enter the approval workflow**.** If the **Submit** and **Go to Workflow** did not populate or you receive an error when attempting to submit, that means an open field is incomplete. Go back and make certain all open fields are complete.

2. A pop-up box will populate to confirm the budget request submission. Click **Submit** again, the funding request will move to the approval workflow.

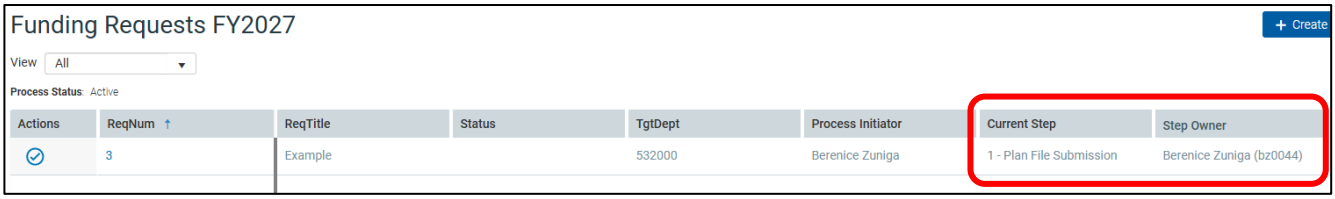


3. Requestors are unable to delete or pullback budget request forms. Requests to delete or have the budget request form pushed back to the requestor may be sent to budget.office@untdallas.edu.
4. For budget users who serve as the department manager approver for the submitted request, please refer to the "Approve Budget Request Form" section on page 18 for detailed instructions.

D. CHECK REQUEST STATUS

1. From the home screen, click on **Budget Request (Workflow View)**.

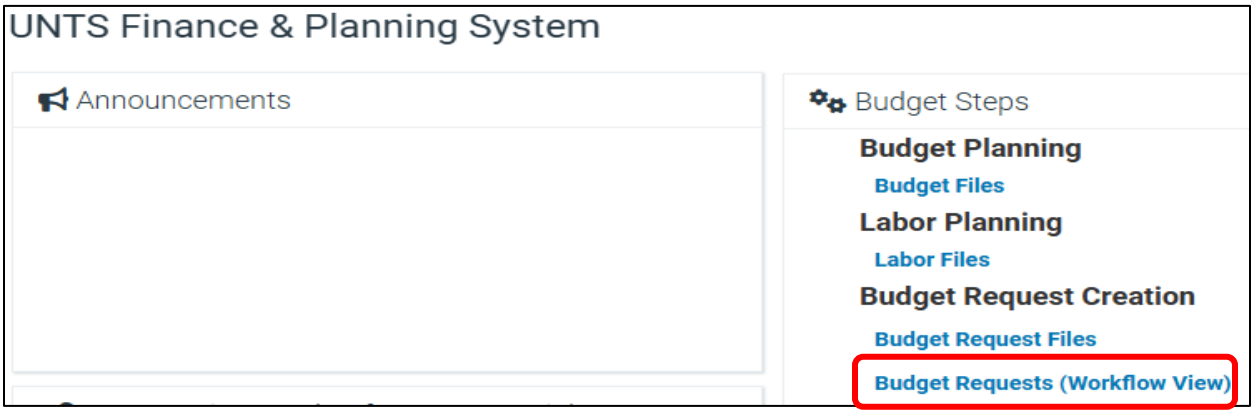
2. To view the approval workflow, check the current step and the assigned step owner. This will provide insight into the status of the funding request



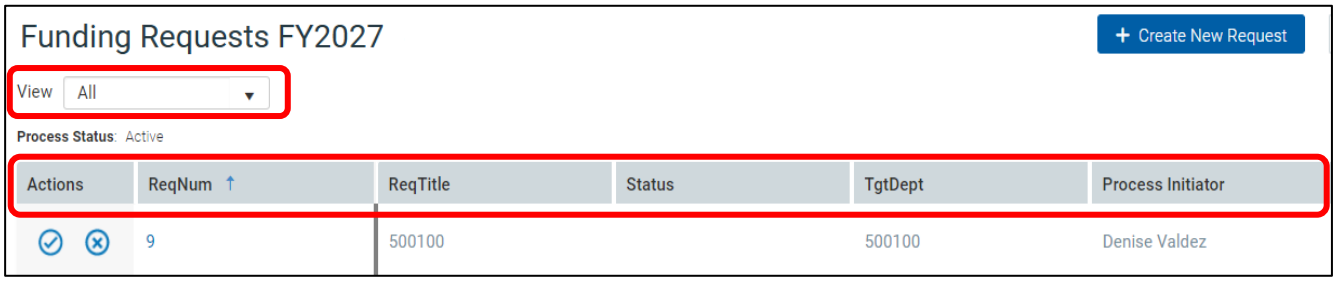
E. APPROVE BUDGET REQUEST FORM

HOW TO ACCESS PENDING REQUESTS

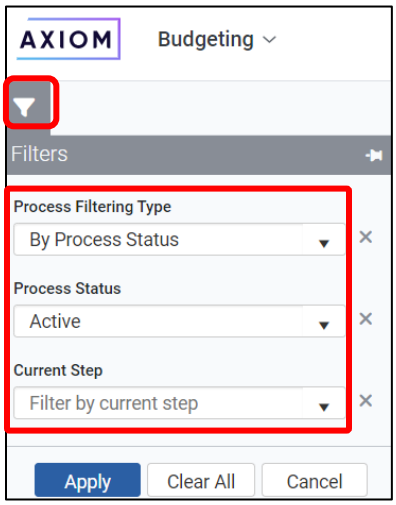
1. Go to Axiom homescreen and click on **Budget Request (Workflow View).** This webpage will provide a list of open funding requests pending review and approval.



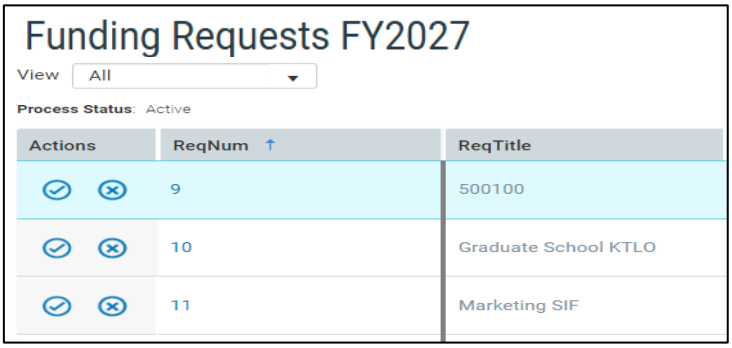
2. The Budget Request (Workflow View) module will open a list of funding requests associated with the user's department(s). On the "View" drop-down selection, select All to review all requests that need approval. The columns on the funding request list are:
    a. **Actions**: Approve by clicking the check mark icon or to reject by clicking on the X icon. This feature should only be utilized after the budget request has been reviewed.
    b. **Request Number**: Hyperlink number opens the detailed workflow for the budget request form.
    c. **Process Initiator**: The user name that submitted the budget request form.
    d. **Current Step**: The approval level in the workflow that the budget request form is pending.
    e. **Due Date**: **Please review budget process calendar to ensure deadlines are met**. Axiom generated due date is always two days after the date the last action step took place. Ex: If the budget request moved from Dept Manger to Dean/AVP for approval on 02/19/2025, then the Axiom due date is 02/21/2025.



3. Approvers have the option to filter the funding request list by: Process Filtering Type, Process Status, or Current Step. Click on the filter icon to view the filter selections.



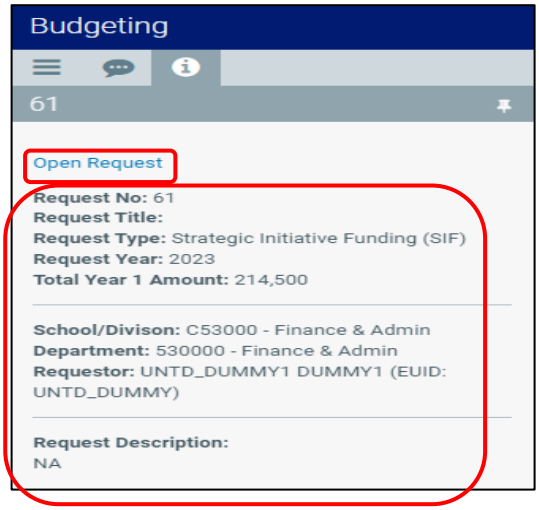
4. In the Budget Request by Initiator module, the Action column allows approvers to click on the to approve or to click on the to reject. See following section on how to review detail before taking these actions.



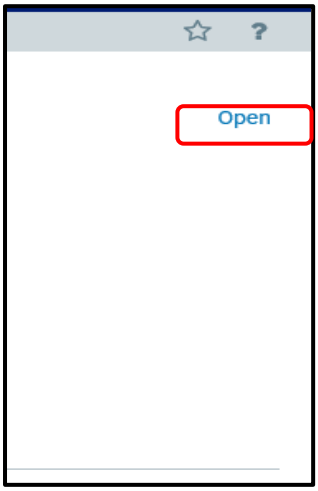
HOW TO VIEW BUDGET REQUEST DETAIL AND SELECT ACTION

1. To view details of the budget request, click on the request number link from the Budget Request by Initiator page to get to the workflow page. To view the detailed budget request form, click either the "Open Request" link on the left side of the webpage or the "Open" link on the right side of the webpage.

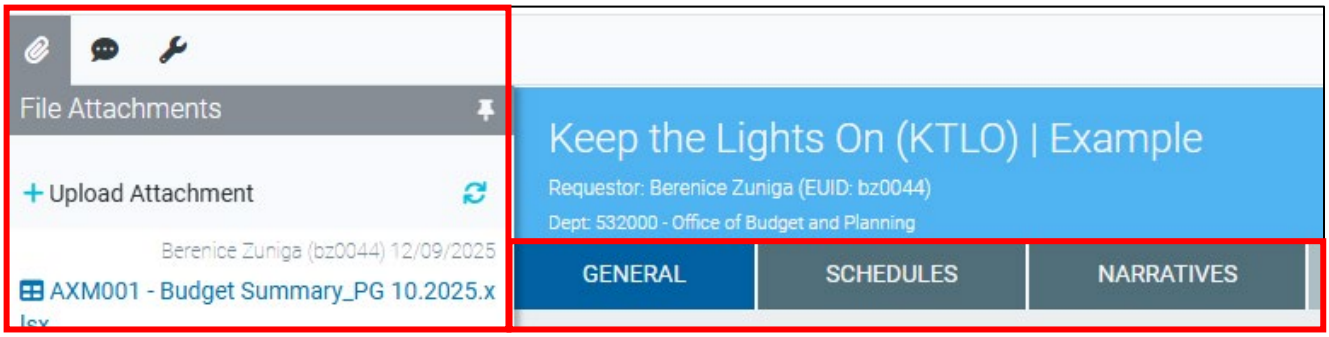
Left side of webpage



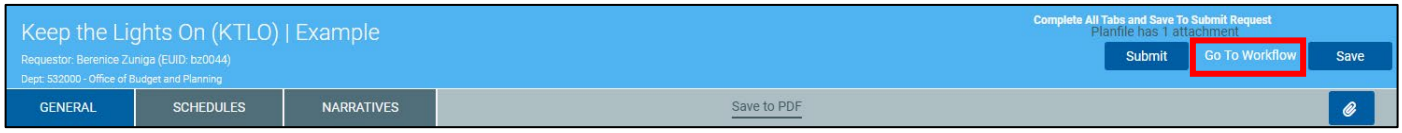
Right side of web page



2. The approver should review the budget request form by clicking on each tab (General, Schedules, and Narratives) and view any attachments or comments. Click on the paperclip icon to view the attachments.

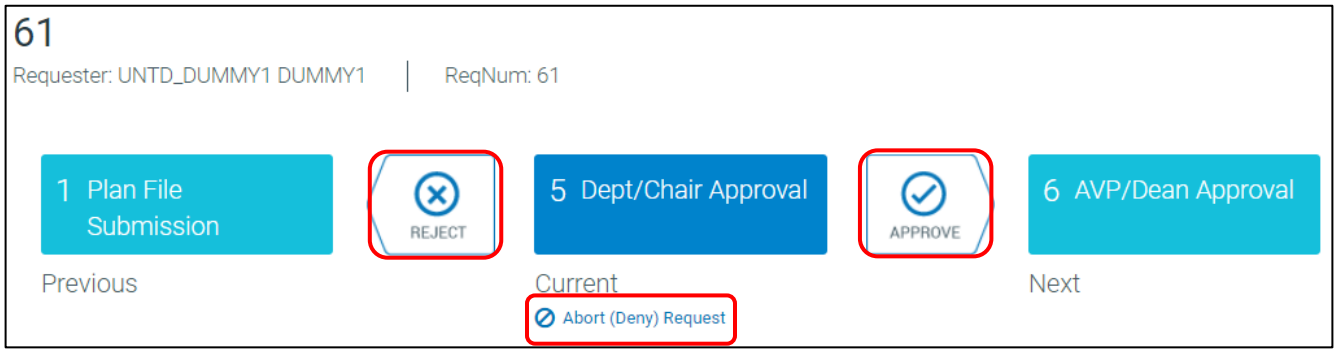


3. On the right side of the page, click the "Go To Workflow" link to access the approval workflow page.



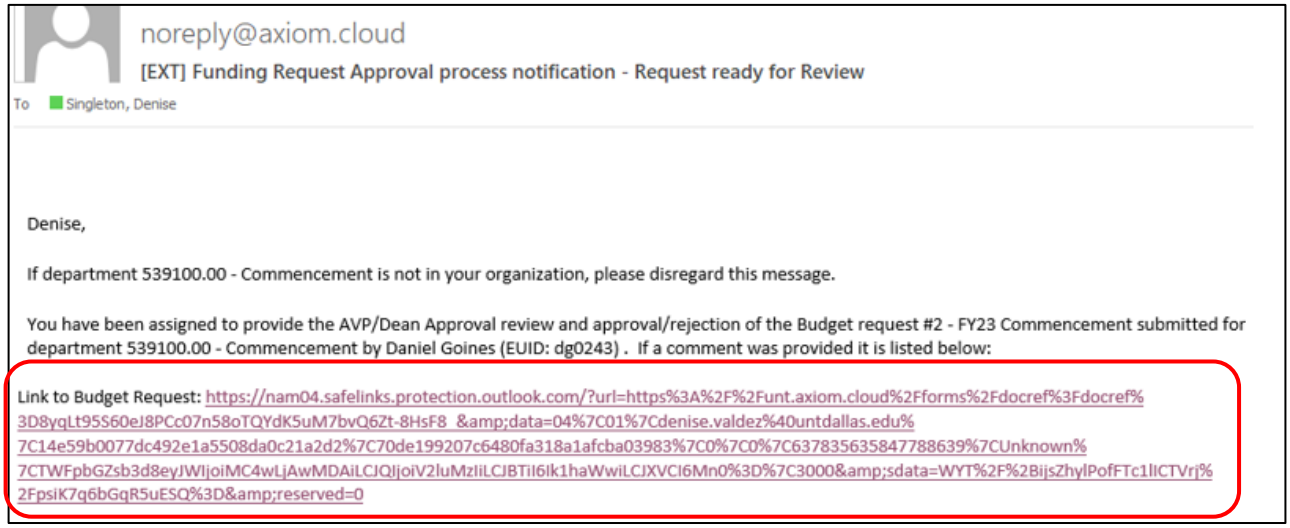
4. On the workflow page, approvers have the option to click either Approve, Reject, or Abort (Deny).

    a. Approve: The request form will be approved and move to the next step.
    b. Reject: The request form will be pushed back to the requester to make changes and re-submit the budget request form.
    c. Abort (Deny): The request form will be denied and not allow the requester to re-submit the budget request form.



APPROVING FROM EMAIL NOTIFCATION LINK

1. Clicking the email link will direct you to the budget request form for the department listed in the email notification. A full list of funding requests pending your approval can be accessed on Budget Request by Initiator page that is located on the Axiom homepage.



2. The detailed budget request will be displayed. Refer to steps 2 through 4 of the previous section “HOW TO VIEW BUDGET REQUEST DETAIL AND SELECT ACTION” to proceed with review and selecting an action.