

# AXIOM BUDGETING

# USER TRAINING GUIDE

University of North Texas at Dallas

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\*\*If you are only an approver, you can go directly to Section III-E page 20. “Approving a Budget Request Form”.

# I. FY23 BUDGET PROCESS:

## A. OVERVIEW OF BUDGET PROCESS

### **In Axiom there are 3 action items to complete:**

- ✓ Review the preliminary FY23 budget for your department (operating and personnel)
- ✓ Submit a budget request form (if needed) or confirm acceptance of the preliminary FY23 department budget
- ✓ Approve the budget request form (if a department chair, AVP, or VP approver)

### **Below will provide detailed information on the actions items that need to be completed.**

#### **1. Budget Plan File**

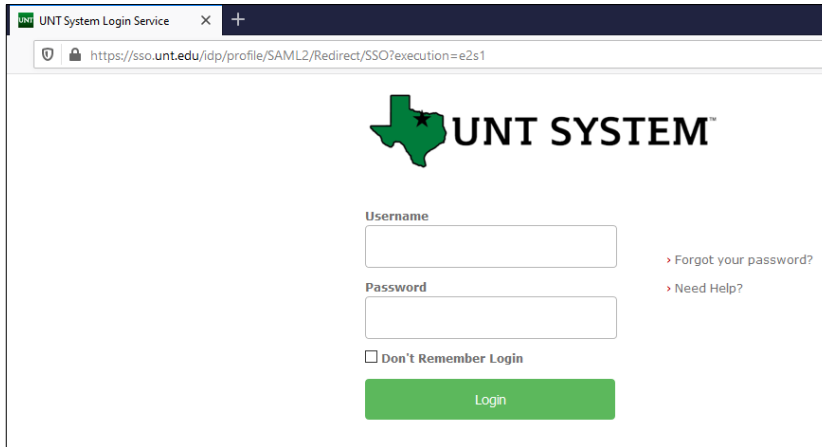
- a. Review the preliminary FY23 budget for operating and personnel expenses in the Budget Plan File. The FY23 base budget was developed using FY22 budget to actual information as of January 31<sup>st</sup> and historical information for the prior three fiscal years (FY21, FY20 and FY19).
- b. To request a shift in the budget allocated between two expense accounts within your department/school, please contact the budget office. This would not involve a change to the total budget for your area.
- c. To request funding in addition to the preliminary FY23 budget, a Budget Request Form must be submitted for operating and/or personnel expenses (Reference Section III of this document).
- d. Once FY23 budget cycle is complete, the budget office will notify budget managers to review the final approved departmental budget in the Budget Plan File. This means that the budget in the system will reflect the preliminary amount plus any additional funding request approved.

#### **2. Budget Request Form:** Request additional funds by selecting from four form options (HEF, KTLO, SIF, and SPF).

- a. Keep The Lights On (KTLO) - Request funds to meet the minimum department commitments and support required mission critical operations.
- b. Higher Education Funds (HEF) - Request funds for capital equipment or improvements with a unit cost of \$250 or greater. Click [here](#) to view HEF guidelines.
- c. Strategic Initiative Funding (SIF) - THIS IS ONLY FOR MAIN CAMPUS- Request funds for new strategic initiatives. The University Budget Advisory Council will consider Strategic Initiative Funding requests submitted using this form.
- d. Special Project Funding (SPF) - THIS IS ONLY FOR COLLEGE OF LAW- Request funds for new special projects.

## B. ENTERING AXIOM

1. The preferred web browsers for Axiom are Internet Explorer or Microsoft Edge.
2. Go to the Axiom website: [unt.axiom.cloud](https://unt.axiom.cloud).
3. The UNTD single sign on screen will appear:



UNT System Login Service

https://sso.unt.edu/idp/profile/SAML2/Redirect/SSO?execution=e2s1

**UNT SYSTEM™**

Username

Password

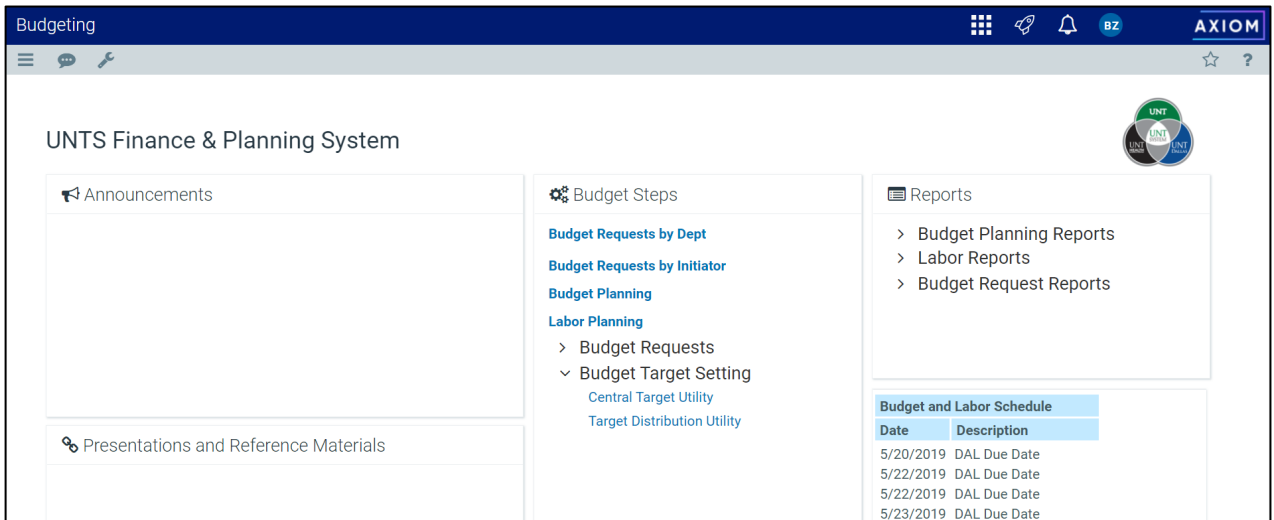
☐ Don't Remember Login

Login

[Forgot your password?](#)

[Need Help?](#)

4. Enter your UNTD credentials and click “Login.”
5. The Homepage will display.



Budgeting

UNTS Finance & Planning System

Announcements

Presentations and Reference Materials

Budget Steps

- Budget Requests by Dept
- Budget Requests by Initiator
- Budget Planning
- Labor Planning
  - Budget Requests
  - Budget Target Setting
    - Central Target Utility
    - Target Distribution Utility

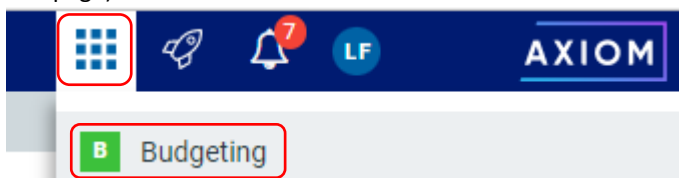
Reports

- Budget Planning Reports
- Labor Reports
- Budget Request Reports

Budget and Labor Schedule

Date	Description
5/20/2019	DAL Due Date
5/22/2019	DAL Due Date
5/22/2019	DAL Due Date
5/23/2019	DAL Due Date

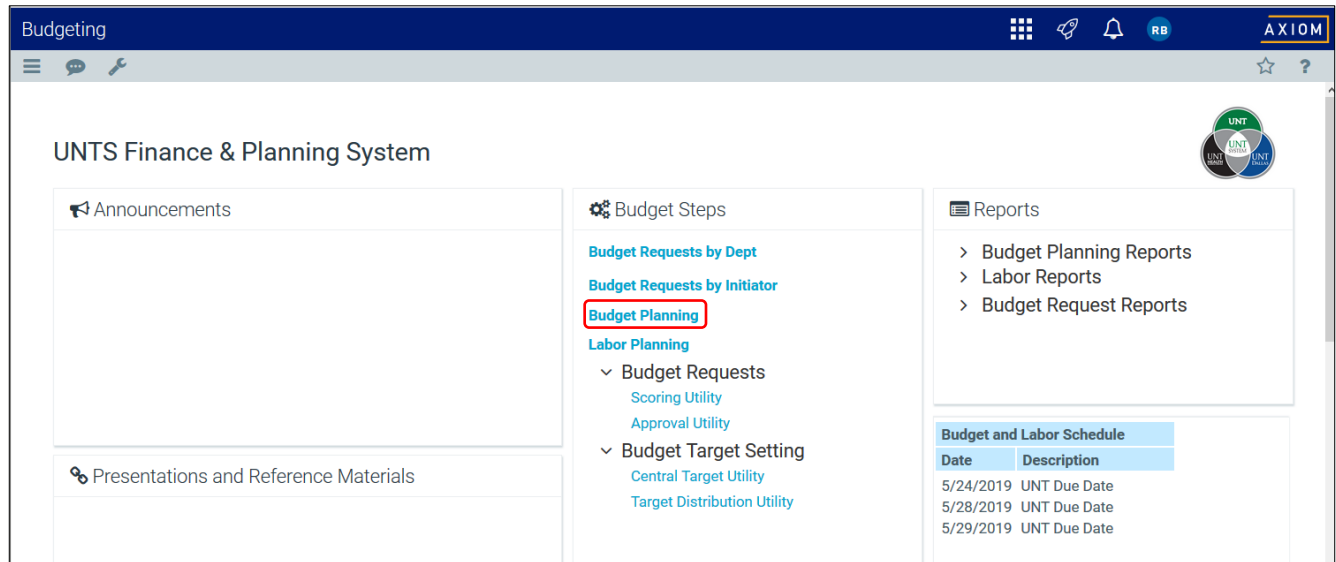
Note: to return to the homepage, click on the tiles icon and select Budgeting (located in the top right corner of the webpage).



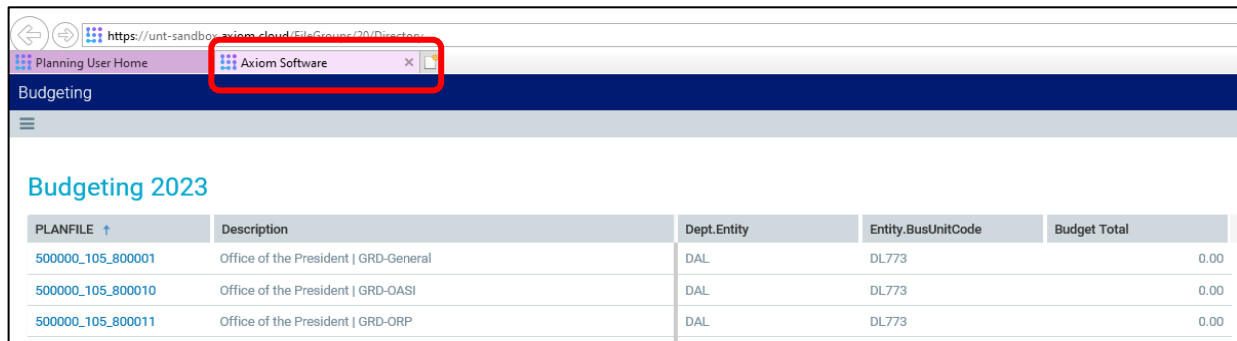
## II. BUDGET PLANNING

### A. REVIEW BUDGET PLANNING MODULE

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




2. A new internet browser tab will appear.




3. Budgets are broken out at the Dept\_FundCat\_Fund level. This combination of fields is referred to as a **planfile**.

Budgeting 2023				
PLANFILE ↑	Description	Dept.Entity	Entity.BusUnitCode	Budget Total
500000_105_805011	Office of the President   State Approp-ORP	DAL	DL773	0.00
500000_105_805012	Office of the President   State Approp-TRS	DAL	DL773	0.00
500000_105_805013	Office of the President   State Approp-GRP INS	DAL	DL773	0.00
500000_105_805038	Office of the President   State Approp-HEF	DAL	DL773	0.00

- To filter a specific department or planfile go to the search bar, enter any part of the planfile number, the department description, or the fund description. Then, press **enter** or click on the magnifying glass  icon. For a listing of all department values, see the “Dept List” tab of “Attachment A – Supplemental Info”.

Budgeting 2023

500000 

PLANFILE ↑	Description	Dept.Entity	Entity.BusUnitCode	Budget Total
500000_105_800001	Office of the President   GRD-General	DAL	DL773	0.00
500000_105_800010	Office of the President   GRD-OASI	DAL	DL773	0.00
500000_105_800011	Office of the President   GRD-ORP	DAL	DL773	0.00

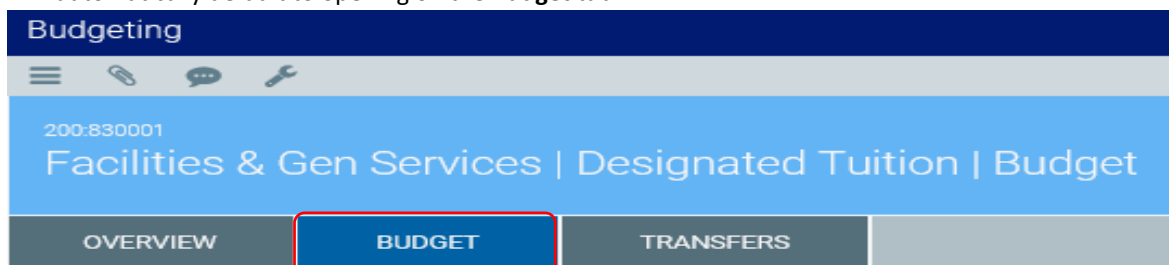
- Planfiles that need to be reviewed will show an amount on the budget total column. Click on the **Planfile** number in blue to open Budget Planning for that Dept\_FundCat\_Fund combination


**NOTE: The budget plan files with \$0 do not need to be reviewed.**

### Budgeting 2023

PLANFILE ↑	Description	Dept.Entity	Entity.BusUnitCode	Budget Total
500000_105_805001	Office of the President   State Approp-BSA	DAL	DL773	228,841.00
500000_105_805010	Office of the President   State Approp-OASI	DAL	DL773	0.00
500000_105_805011	Office of the President   State Approp-ORP	DAL	DL773	0.00
500000_105_805012	Office of the President   State Approp-TRS	DAL	DL773	0.00
500000_105_805013	Office of the President   State Approp-GRP INS	DAL	DL773	0.00
500000_105_805038	Office of the President   State Approp-HEF	DAL	DL773	0.00
500000_200_830001	Office of the President   Designated Tuition	DAL	DL773	704,845.01

- 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.



7. 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. Review the chartstrings that have a proposed expense budget. For a listing of all program and purpose value names, see the “Purpose Descr” and “Program Descr” tabs of “Attachment A – Supplemental Info”.

200:830001 Facilities & Gen Services   Designated Tuition   Budget						
OVERVIEW		BUDGET		TRANSFERS		
Select Category All		Target \$2,500,000.00	Proposed Budget 2023 \$1,250,476.00	Variance \$1,249,524.00		
Account	Budget Method	Actual FY2021	Actual Month YTD FY2022	Budget FY2022	Proposed Budget FY2023	
> 533000-200-830001-600-----					Proposed Revenue: 0.00; Proposed Expense Budget: 1,250,476.00	
> 533000-200-830001-600-----12447-					Proposed Revenue: 0.00; Proposed Expense Budget: 0.00	
> 533000-200-830001-600-----13353-					Proposed Revenue: 0.00; Proposed Expense Budget: 0.00	
> 533000-200-830001-600-----14254-					Proposed Revenue: 0.00; Proposed Expense Budget: 0.00	
> 533000-200-830001-600-----18064-					Proposed Revenue: 0.00; Proposed Expense Budget: 0.00	
> 533000-200-830001-600-----18065-					Proposed Revenue: 0.00; Proposed Expense Budget: 0.00	

## B. UNDERSTANDING BUDGET PLAN FILE

### 1. COLUMNS ON THE BUDGET TAB

Account	Budget Method	Actual FY2021	Actual Month YTD FY2022	Budget FY2022	Proposed Budget FY2023	Variance Proposed - FY2022 Budget
---------	---------------	---------------	-------------------------	---------------	------------------------	-----------------------------------

- **Account:** Identifies the account where budgeting is occurring.
- **Actual FY2021:** Provides the actual revenues/expenses from fiscal 2021.
- **Actual Month YTD FY2022:** Provides the current YTD actuals through 03/04/2022.
- **Budget FY2022:** The FY22 budget is equal to original budget plus permanent adjustments made during the year.
- **Proposed Budget FY2023:** This field is pre-populated with the preliminary FY23 budget.
- **Variance Proposed – FY2022 Budget:** This column calculates the variance between the preliminary FY23 budget (Proposed Budget FY2023 column) and the FY22 budget (Budget FY2022 column).


### 2. SECTIONS OF THE BUDGET TAB.


The **Budget** tab is broken out into 4 sections:

- **Revenue:** All 4XXXX and 6XXXX revenues will be budgeted here. Revenues are budgeted at the base account level.

Revenue				
43824 - Event Revenue	Input Total	-	-	20,000.00
+ Add New Revenue Account				
Total Revenue		-	-	20,000.00

- **Labor:** The labor budgets in the **Proposed Budget FY2023** column reflect encumbered salaries as of 03/04/2022 plus any approved positions or placeholders. Placeholders are to identify positions that do not have a position number created or any wages that are being proposed for FY23.

To view a roster of the individuals and encumbrances associated with the Proposed Budget FY2023, click on the magnifying glass  symbol next to the labor account.

 D5031 - Wages	From Labor	3,816.80	2,007.90	39,999.96	15,000.00
 D5050 - Payroll Related Costs	From Labor	143.42	106.30	800.04	-

A popup screen will appear. Click **Leave this page**. Unsaved changes will not be lost.

**Axiom Software**

You have unsaved changes that will be lost if you continue.

Are you sure you want to leave this page?

Leave this page
Stay on this page

A new Labor Drill tab will appear. In the screenshot below is a \$15,000 placeholder budget entered for FY23 student workers. The placeholder is an entry made to distinguish the FY23 D5031-Wages Acct budget.

Labor Drill				
Chartstring="513000-200-830001-400-----" AND Acct.BudgetAcct "D5031"				
Employee Name	Position	Home Department	Total Proposed Budget Amount	
Benitez,Kelly Yamilex	-	- Learning Commons	-	
Brown,Roxanna Danyell Baker	-	- Learning Commons	-	
Diaz,Jesus Rafael	-	- Learning Commons	-	
Dotie,Jordyn A	-	- Learning Commons	-	
Medina,Salvador	-	- Learning Commons	-	
Salazar Hernandez,Ashley Mariana	-	- Learning Commons	-	
Ubias,Mary Frances	-	- Learning Commons	-	
Wages Placeholder	Testing	- Learning Commons	15,000.00	
<b>Total</b>			<b>15,000.00</b>	

For centrally funded chartstrings, (funds 830001, 805001, and 800001) D5050 Payroll Related Costs will be budgeted on a central department. The Proposed Budget FY2023 column will not have a budget for D5050 at the departmental level. **Note: This is a change for 830001 for FY2023.**



200-830001

Learning Commons | Designated Tuition | Budget

OVERVIEW

BUDGET

TRANSFERS

Select Category

All

Target

\$30,000.00

Proposed Budget 2023

\$30,000.00

Variance

\$-

Account	Budget Method	Actual FY2021	Actual Month YTD FY2022	Budget FY2022	Proposed Budget FY2023
513000-200-830001-400-----					
Revenue					
+ Add New Revenue Account					
Total Revenue		-	-	-	-
M&O					
D5031 - Wages	From Labor	3,816.80	2,007.90	39,999.96	15,000.00
D5050 - Payroll Related Costs	From Labor	143.42	106.30	800.04	-

- **M&O:** All operating expenses are budgeted here. These expenses are budgeted at the D-Level.

**Note:** Any adjustments made in the open fields are unable to be saved. If you need to make any adjustments from D-level to another please email the budget office for this request. This is referenced in "Next Steps" section (pg 10).

M&O					
D5101 - Professional Fees & Svcs	Input Total	101,147.90	-	149,558.43	149,558.43
D5251 - Travel	Input Total	11,326.68	-	10,000.00	10,000.00
D5301 - Materials & Supplies Exp	Input Total	5,187.62	-	55,188.22	55,188.22
D5331 - Communication & Utilities	Input Total	959.00	-	2,000.00	2,000.00
D5350 - Repairs and Maintenance	Input Total	211.00	-	2,828.06	2,828.06
D5360 - Rental Exp-Non-Cap	Input Total	225.00	-	1,000.00	1,000.00
D5371 - Printing & Reproduction	Input Total	279.06	-	15,000.00	15,000.00
D5501 - Other Operating Exp	Input Total	4,359.37	-	10,000.00	10,000.00
D5701 - Capital Expense	Input Total	149,025.00	-	-	-
+ Add New M&O Account					
Total M&O		272,720.63	-	245,574.71	245,574.71

- **Transfers:** Transfers are populated from the **Transfers** tab and are budgeted at the base account level by the budget office.

Transfer					
70001 - Trans to Other Funds	From Transfers	5,500.00	-	-	-
70003 - Trans from Other Funds	From Transfers	-	-	71,775.25	-
70005 - Trans to Sponsor Funds	From Transfers	-	-	-	-
Net Transfer		5,500.00	-	71,775.25	-

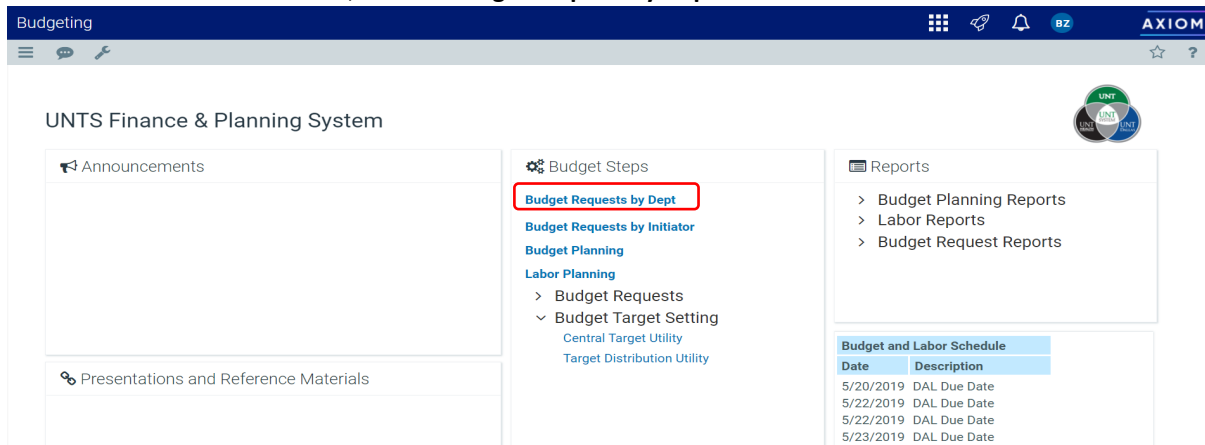
## C. NEXT STEPS

1. After reviewing the departmental Proposed FY23 Budget, action is needed.
  - a. If the department agrees with the FY23 proposed budget that is shown in the budget plan files and does not have any changes to request, email the budget office at [budget.office@untdallas.edu](mailto:budget.office@untdallas.edu) to confirm acceptance of the preliminary FY23 budget.
  - b. If the department agrees with the total FY23 proposed budget shown in the budget plan files but would like to move funding within D-Accounts or within departments in their area, the next step is to email the budget office at [budget.office@untdallas.edu](mailto:budget.office@untdallas.edu) to request the funding reallocation.
  - e. If the department is requesting additional funds to meet departmental commitments or to support required mission critical operations, submit a budget request form for KTLO (**Keep The Lights On**).
  - f. If the department is requesting funding for capital equipment or improvements with a unit cost of \$250 or greater, submit a budget request form for HEF (**Higher Education Funds**). Click [here](#) to view HEF guidelines.
  - g. (Main Campus only) If the department is requesting UBAC strategic initiative funding for FY23, submit a budget request form for SIF (**Strategic Funding Initiative**).
  - h. (College of Law only) If the department is requesting for special project funding for FY23, submit a budget request form for SPF (**Special Project Funding**).
2. Important information:
  - a. Reference section III of this document for detailed instructions for how to submit a budget request.
  - b. The following items will be zero base budget for FY23. A budget request form is required to receive funding for FY2023:
    - i. Adjunct budget (on purpose code 10221) (use D5012)
    - ii. Augmentations (use D5040), staff task payments (use D5014) and faculty task payments (use D5012)
    - iii. Marketing items- Note: D5371- Printing & Reproduction accounts were zeroed out in the base budget- excluding Office of Information Technology, Commencement, Marketing, Trail Blaze Elite and College of Law.
  - c. Any additional staff/faculty salaries or reclass/promotion requests will need to be submitted during the FY23 budget cycle. Personnel budget changes will not be approved after the FY23 budget cycle.
  - d. FY24 faculty budget requests will be reviewed during a later process with the Provost Office. No action is required in Axiom.
  - e. If you are unsure of which D-Level account to select on the budget request form, see the “D-Level Acct Roll-Up” tab in “Attachment A Supplemental Info”.
  - f. If departments are planning use of prior year fee reserves, this should be requested via email to [budget.office@untdallas.edu](mailto:budget.office@untdallas.edu).
  - g. For a list of the estimated costs associated with procuring standard computers and laptops, see the “Standard Cost Estimation Guide” tab in “Attachment A Supplemental Info”.

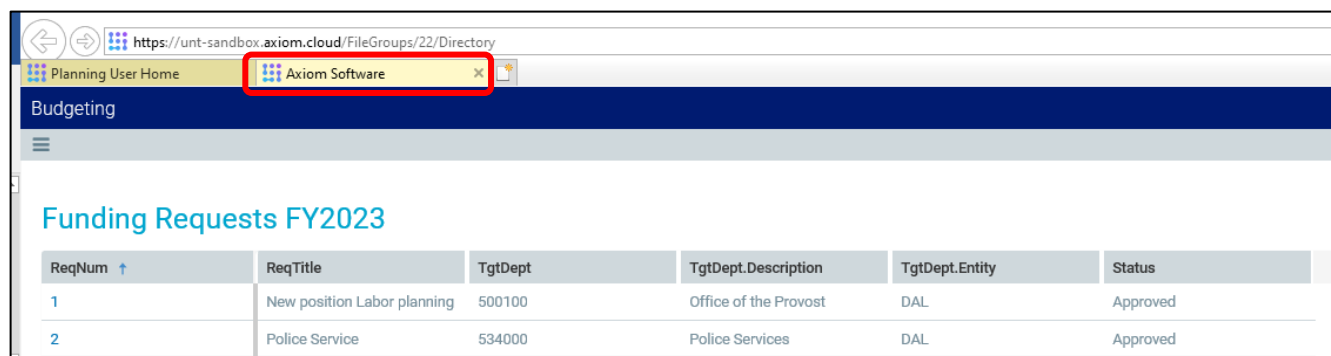
### III. BUDGET REQUEST FORMS

#### A. CREATE A BUDGET REQUEST FORM

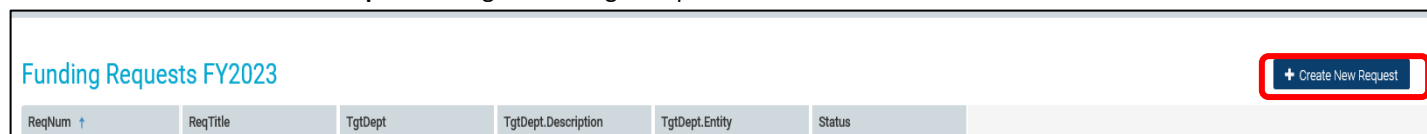
1. From the home screen, click on **Budget Request by Department**.



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** (Key in the dept ID in the field or scroll down to the dept ID. For a listing of all department values, see the “Dept List” tab of “Attachment A – Supplemental Info”.) Then select the **Request type** (KTLO, SIF, HEF, SPF- The description of each form is located on page 10.) Select the **Expense Schedules** (Operating, Position or Both), and then click **Create**.

**Budgeting**

**Request Form**  
Fiscal Year 2023

Request Title: (50 character max.)  
Wages & Supplies for Police Department

Select Owning Dept:  
534000 - Police Services

Request Type:  
Keep the Lights On

Expense Schedules: ☒ Position ☒ Operating

Create

5. The Budget Request Form module will open and has 4 tabs: **General**, **Schedules**, **Categories**, and **Narratives**. The Budget Request Form module will automatically default to opening on the **General** tab.

**Strategic Reduction | Wages & Supplies for Police Department**

Requestor: Denise Valdez (EUID: dpv0015)  
Dept: 534000 - Police Services

GENERAL SCHEDULES CATEGORIES NARRATIVES

Save to PDF

6. The **General** Tab will require the user to select a **Strategic Plan Focus Area and Initiative** (UNTD Strategic Trails). In the **Strategic Plan Key Results**, select N/A. Enter a detailed description based on the Strategic Plan Focus Area in **Request Description** field. Once all fields are complete click on the **Schedules** Tab. To find more information on the Strategic Trails, click [here](#).

**GENERAL** SCHEDULES CATEGORIES NARRATIVES Save to PDF

Request Title: Wages & Supplies for Police Department

Strategic Plan Focus Area and Initiative: 4. People and Teamwork

Strategic Plan Key Results: N/A

Request Description: We are planning to hire more student workers for the front office to meet the capacity of our customers. We will need office supplies for the student workers that will be added to our team.

Dept: 534000 - Police Services

Dept Description: Police Services

Manager Name: Shaw, Christopher L.

School/Division: CS3400 - Police & Parking

Cabinet Member: BS3000 - Finance & Admin

- In the **Schedules Tab**, users will select the D-Accounts for the funding requests. Multiple line items can be entered for the Operating and Personnel Schedules. Users will have the option to select Position, Operating, or Both.

- Operating Schedule** is for operating & maintenance 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 item. If the item is recurring, amounts may be entered in Years 2 through 5 if applicable. To add more line items, click on the + Insert New Value. Users are required to enter comments to justify the funding line items. The Total Estimated Cost will populate once amounts are entered.

Note: Student worker/ hourly wages must be on D5031 located in the Operating Schedule.

Note: Additional justification can be attached to the budget request form (instructions are on page 16).

- Position Schedule** is for personnel funding requests. Select the personnel account, enter the FTE, and determine the amount from year 1-5 (Do not include merit or market increases). The fringe benefits will auto calculate 25% based on the salary amount. Users are required to enter comments to justify the funding line item. The Total Estimated Cost will populate once amounts are entered.

**Note: If the FTE and Year 1-5 fields do not populate when the Personnel account is selected, click on the Categories tab (located next to the Schedule tab) and go back to the Schedule tab. The open fields will then appear.**

Note: Select D5012 for adjuncts and faculty task payments, D5014 for staff task payments, D5040 for augmentations, D5031 for student and other hourly workers, and D5016 for legal writing positions.

Available Schedules: ☒ Position ☒ Operating

Summary Schedule

Position	Year 1	Year 2	Expense	Year 4	Year 5	5 Year
FTE	One Time	Recurring	Year 3	Total	Total	Grand Total
1.00	21,000	187,500	Total	-	-	458,500
		250,000	-			

Position Schedule

Account	FTE	Year 1	Year 2	Year 3	Year 4
D5014 Salaries -Staff	1.00	150,000	200,000		
+ Insert New Value					
Total	1.00	150,000	200,000	-	-
Fringe Amount @ 25%		37,500	50,000	-	-
Total Estimated Personnel Cost		187,500	250,000	-	-

10. The **Categories** Tab will require users to select the **primary rationale of the request** (*Accreditation, Compliance, Strategic, Process Improvement, Innovation*), **level of urgency** (*Critical, Normal, Low*), **impacts within campus departments** (*One, Several, All or None*), **impact with student population** (*One, Several, All or None Student Impact*). Detail description is required for each selection in the Comment box.

GENERAL	SCHEDULES	CATEGORIES	NARRATIVES	Save to PDF
---------	-----------	------------	------------	-------------

Category	Selection	Comment
Select the primary rationale for the request, include a brief comment on your selection.	Select	
Indicate the level of urgency, include a brief comment on your selection.	Select	
Specify the impact that this request will have on the campus departments, include a brief comment on your selection.	Select	
Specify the impact that this request will have on the student population, include a brief comment on your selection.	Select	

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

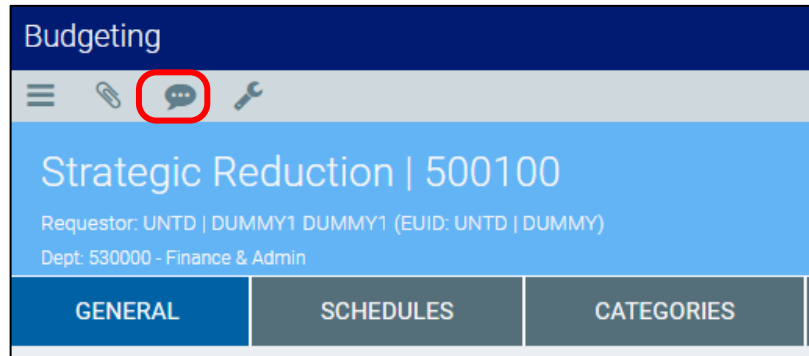
GENERAL	SCHEDULES	CATEGORIES	NARRATIVES	Save to PDF
---------	-----------	------------	------------	-------------

Question	Response
If this fund request does not get funded, what will be the impact toward the UNTD?	
How does this funding request support the strategic focus for the upcoming fiscal year?	

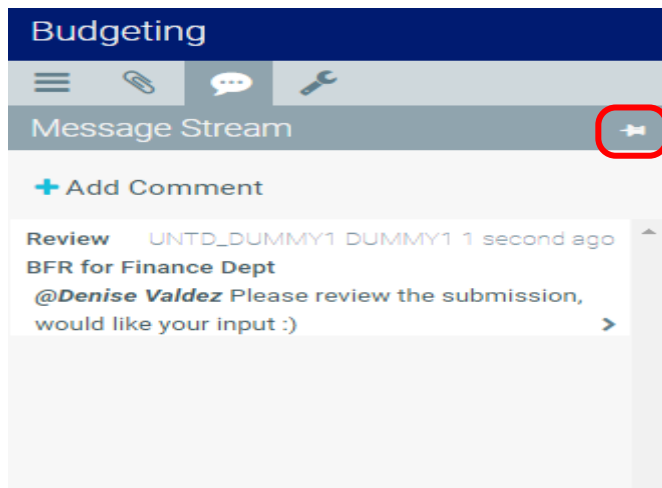
## B. ADDING COMMENTS AND ATTACHMENTS

### ADDING COMMENTS

1. Users are able 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 to be written. Individual users can be tagged using the drop down box, users that are tagged will be 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.

Add Comment

Title

optional

Message

B I U

Tag user

@Bradford Love @Berenice Zuniga

Post Cancel

- 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

- Attachments can also be added to a budget request form. Select the paperclip icon in the upper left of the screen.


Budgeting

Strategic Reduction | 500100

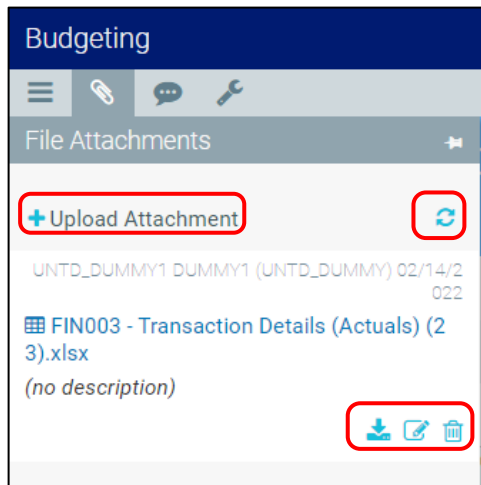
Requestor: UNTD | DUMMY1 DUMMY1 (EUID: UNTD | DUMMY)

Dept: 530000 - Finance & Admin

GENERAL SCHEDULES CATEGORIES

- 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.
- 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.
- 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 your 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. This functionality is not active at this time.
  - The Trash Can icon will delete the attachment. A popup window will appear to confirm or allow canceling if your selection was not intentional.





## C. SAVING AND SUBMITTING TO WORKFLOW

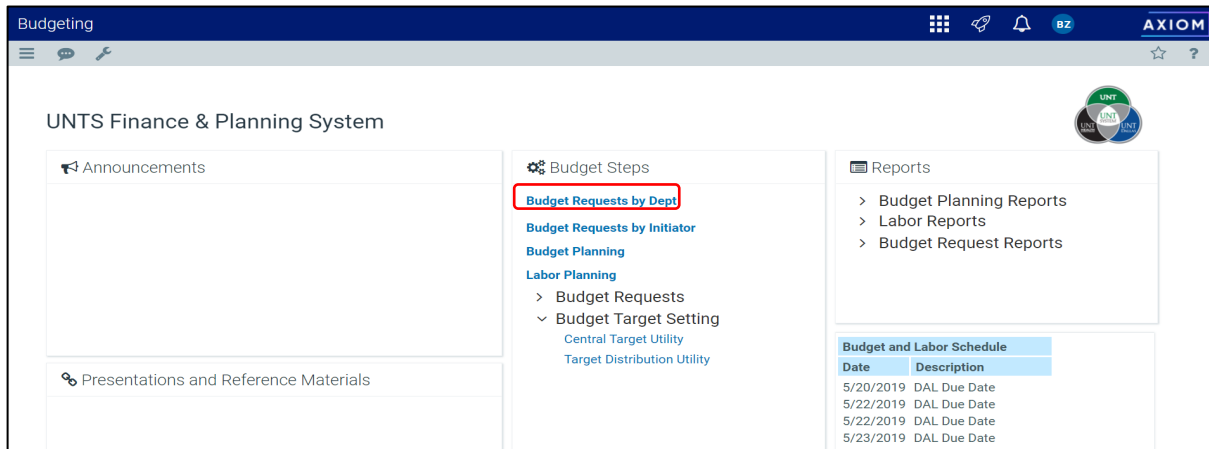
1. Once all the tabs are complete, click **Save**. The **Submit** and **Go To Workflow** will populate. Click **Submit**.

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

4. If you are not an approver, you can close the tab and view budget request form status (page 18). If you are an approver, please go to Approving a Budget Request Form (page 20) to get more detailed information.

## D. STATUS OF BUDGET REQUEST FORMS

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



2. The Funding Request FY2023 for the user departments will be listed. Once the budget request has been finalized, the status will appear as:
  - a. Approved- the budget request has been approved
  - b. Deny- the budget request was not approved
  - c. Blank- the budget request has not been finalized

ReqNum ↑	ReqTitle	TgtDept	TgtDept.Description	TgtDept.Entity	Status
1	New position Labor planning	500100	Office of the Provost	DAL	Approved
2	Police Service	534000	Police Services	DAL	Approved
3	Operating on HEF	500200	Strategic Analysis & Reporting	DAL	Approved
4	KTLO Request	500152	College Readiness	DAL	
5	HEF request 1	515100	Graduate Admissions	DAL	
6	testing123	500000	Office of the President	DAL	

3. To view the status of the workflow, click on the ReqNum blue link and the Budget Request Form module will open.

ReqNum ↑	ReqTitle	TgtDept	TgtDept.Description	TgtDept.Entity
1	New position Labor planning	500100	Office of the Provost	DAL
2	Police Service	534000	Police Services	DAL

- Click "Go to Workflow" located on the right side of web page.

Budgeting

Strategic Initiative Funding (SIF) | New position Labor planning

Requestor: Denise Valdez (EUID: dpv2015)  
Dept: 500100 - Office of the Provost

Complete All Tabs and Save To Submit Request

Go To Workflow

GENERAL SCHEDULES CATEGORIES NARRATIVES Save to PDF

Request Title: New position Labor planning

Strategic Plan Focus Area and Initiative: 4. People and Teamwork

Description of how this request supports the Strategic Plan Focus Area and Initiative is required on Narratives tab

Strategic Plan Key Results: 4.1.4 Establish traditions for UNTD students

- The workflow will show the approvers that are next to complete the workflow for the budget request form. You may have multiple approver roles, make certain that all steps approval with your role is approved.

55

Requester: Test UNTD\_DeptChair | ReqNum: 55

1 Plan File Submission

REJECT

6 AVP/Dean Approval

APPROVE

7 Provost/VP Approval

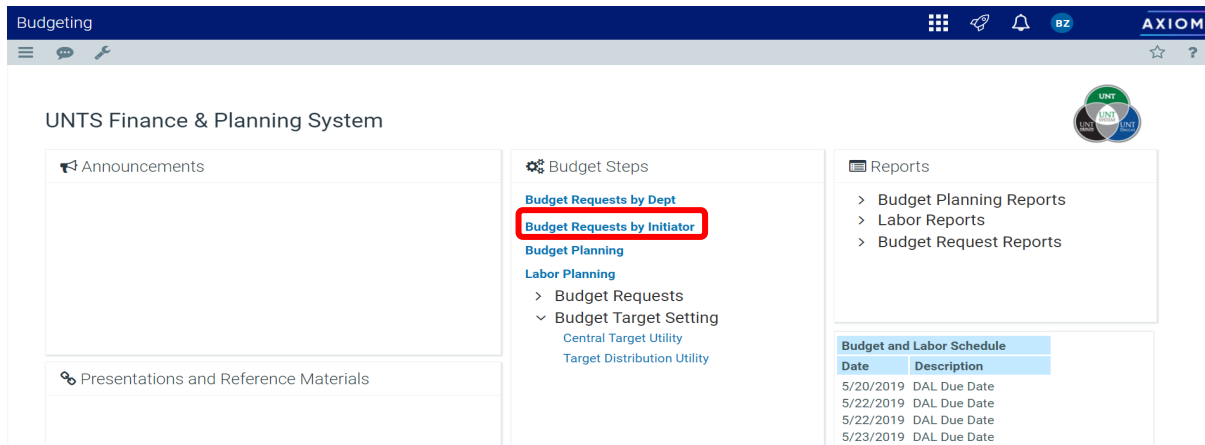
Previous Current Next

All Steps All Process Activity

	Step	Status	Details
✓ 1	Plan File Submission	Completed	Completed by Test UNTD_DeptChair on 2/9/2022
✓ 2	Space Committee Approval	Skipped	Skipped on 2/9/2022
✓ 3	Research Committee Approval	Skipped	Skipped on 2/9/2022
✓ 4	IT Committee Approval	Skipped	Skipped on 2/9/2022
✓ 5	Dept/Chair Approval	Completed	Completed by Test UNTD_DeptChair on 2/9/2022
6	AVP/Dean Approval	Active	Assigned to Berenice Zuniga, Leigh-Anne Fashina, Denise Valdez, Luis
7	Provost/VP Approval	Not Started	Berenice Zuniga, Luis Angulo, Denise Valdez

## E. APPROVING A BUDGET REQUEST FORM

1. In the Axiom homescreen, click on **Budget Request by Initiator**, this webpage will provide a list of open funding requests the approver needs to review/and approve.



2. The Budget Request by Initiator module will open a list of funding requests associated with the user's department(s). Noteworthy columns on the funding request list are:
  - a. **Actions**- able to approve by clicking the check mark icon or able to reject by clicking on the X icon
  - b. **Request Number**- the number of the budget request form for UNTD. Clicking on the blue link # will take the approver to the detail workflow.
  - c. **Process Initiator**- the user that submitted the budget request form.
  - d. **Current Step**- the approval level in the workflow that the budget request form is pending.

**Note: only approve the budget requests when the current step lists your approval level for that department (Dept/Chair, AVP/Dean, or Provost/VP).**

- e. **Due Date**- Please default to due dates provided by the budget office to ensure timeliness of approvals. The date shown here is generated by Axiom as 2 days after the prior step has taken place. Example: The budget request has moved from Dept Manger to Dean/AVP for approval on 4/15/2022 the due date generated would be 4/17/2022.

Funding Requests FY2023									
View: All									
Process Status: Active									
Actions	ReqNum	ReqTitle	Status	TgtDept.TgtDept	Process Initiator	Current Step	Step Owner	Due Date	Status Details
	5	HEF request 1		515100	Denise Valdez	1 - Plan File Submission	Denise Valdez (dpv0015)	(no due date)	Active 54 days

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

## DETAIL BUDGET REQUEST APPROVAL WORKFLOW

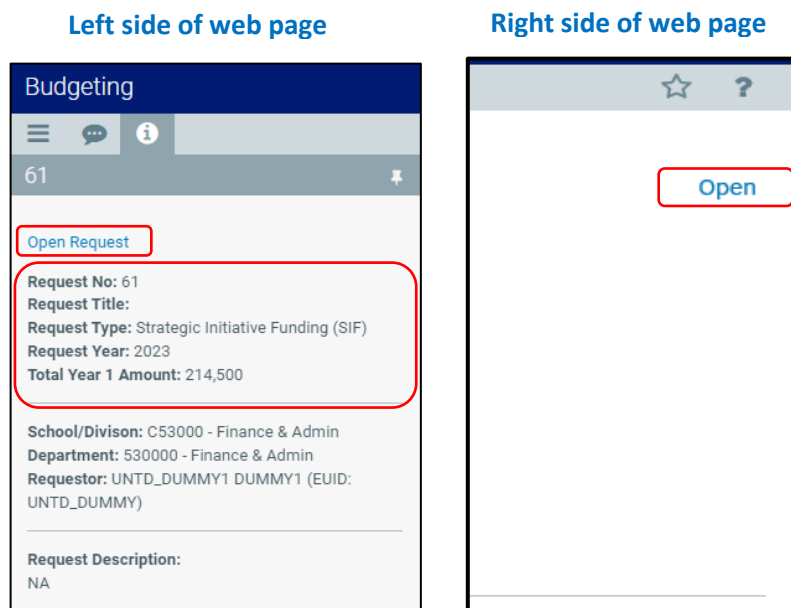
1. In the Budget Request by Initiator module, click on the request number or process state blue link to access the detail budget request workflow.

View	All	
Process Status: Active		
Actions	ReqNum ↑	Process State
	<a href="#">49</a>	<a href="#">Active</a>
	<a href="#">58</a>	<a href="#">Active</a>
<a href="#">✓</a> <a href="#">✕</a>	<a href="#">61</a>	<a href="#">Active</a>
		Test UNTD_AVP
		UNTD_DUMMY1 DUMMY1
		UNTD_DUMMY1 DUMMY1

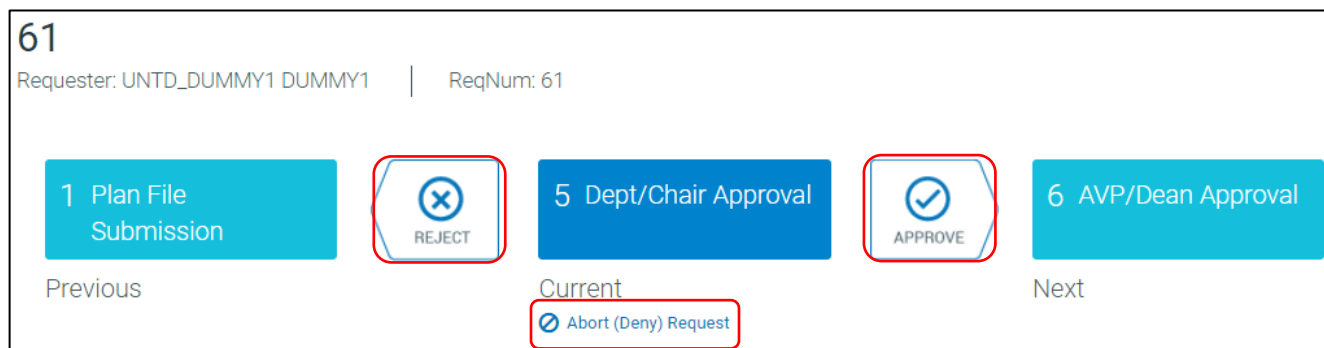
2. The budget request workflow will open and provide the details of the budget request submission and each approval that is needed to complete the workflow.

All Steps				
All Process Activity				
	Step	Status	Details	Days in Step
✓ 1	Plan File Submission	Completed	Completed by UNTD_DUMMY1 DUMMY1 on 2/15/2022	0
✓ 2	Space Committee Approval	Skipped	Skipped on 2/15/2022	0
✓ 3	Research Committee Approval	Skipped	Skipped on 2/15/2022	0
✓ 4	IT Committee Approval	Skipped	Skipped on 2/15/2022	0
5	Dept/Chair Approval	Active	Assigned to UNTD_DUMMY2 DUMMY2,Theresa Lam,Leigh-Anne Fashina,Denise Valdez,UNTD...	0
6	AVP/Dean Approval	Not Started	Test UNTD_AVP,Berenice Zuniga,Leigh-Anne Fashina,Denise Valdez,UNTD_DUMMY1 DUMMY...	
7	Provost/VP Approval	Not Started	UNTD_DUMMY1 DUMMY1,Luis Angulo,Berenice Zuniga,Denise Valdez	
8	HEF Committee Approval	Not Started	<skip>	
9	Capital Approval	Not Started	<skip>	
10	Central Review	Not Started	Test UNTD_CentralReview,Leigh-Anne Fashina,Berenice Zuniga,Luis Angulo,Denise Valdez	

3. The details to the budget request form will be provided on the left side or the right side of the webpage. Approvers are able to click on the “Open Request” link to view the budget request form module.



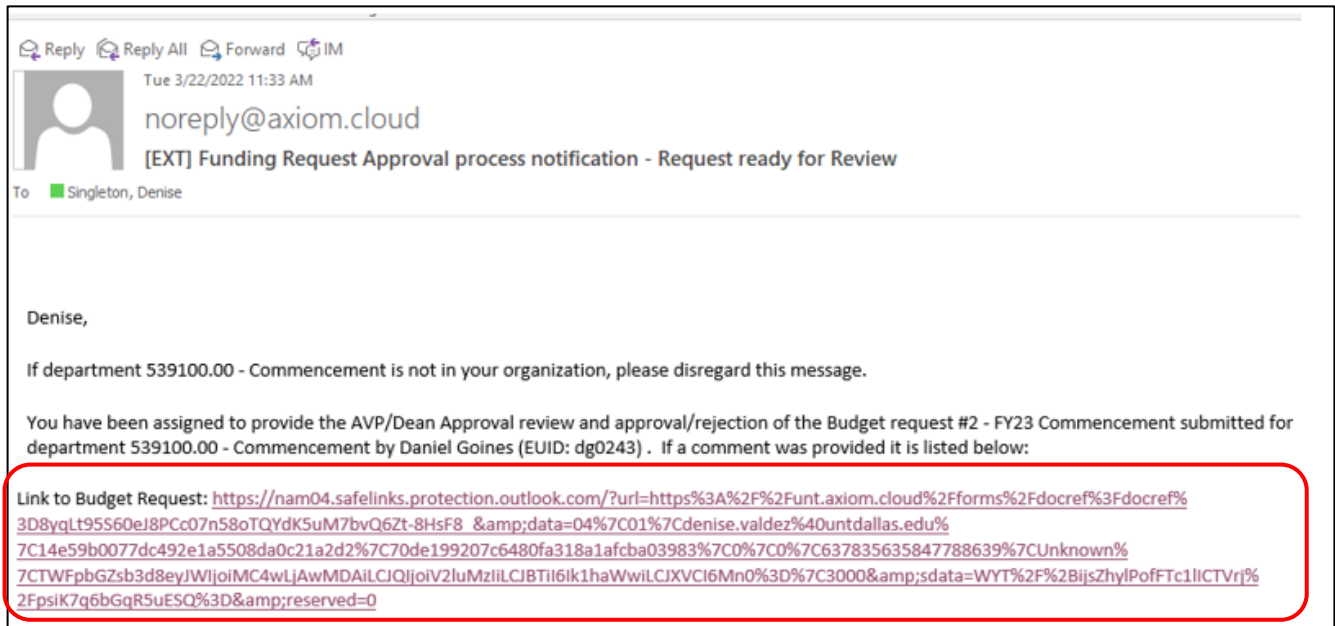
6. Approvers have the option to click either Approve, Reject, or Abort (Deny).
  - a. Approve- The request form will be approve and move to the next step.
  - b. Reject- The request form will be pushback to the requester to make changes and re-submit the budget request form.
  - c. Abort (Deny) – The request form will be denied and not allow the requester to re-submit the budget request form.



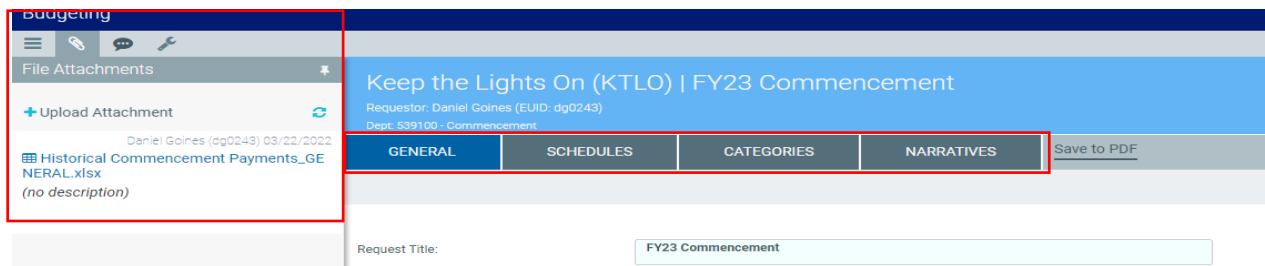
**\*\*Important:** As a reminder, budget requests are for funds incremental to what has been provided in the budget plan files. Approvers should review the initial budget plan file to ensure additional dollars are needed.

### APPROVING FROM EMAIL NOTIFICATION LINK

1. Clicking the email link will direct you to the budget request form to the department that was associated on the email notification. \* To view a list of funding request that need your approval please view page 20 - Budget Request by Initiator.



2. The approver can review the budget request form by clicking on each tab (General, Schedules, Categories, Narratives) and viewing any attachments.



3. On the right side of the page the approver is able to click to the “Go To Workflow” link to access the Approval workflow webpage. The approver will be able to Approve, Reject or Deny in the workflow webpage. For details on next steps required in the workflow see step #2 in the “DETAIL BUDGET REQUEST APPROVAL WORKFLOW” section on page 21.

