Entering Budget Requests in Axiom

Purpose:

The use of Budget Requests through Axiom will replace the Smartsheet process previously used to submit Budget Prioritization Requests.

About the process: Resource allocation requests are collected by the Budget Office and shared with the President's Cabinet. Cabinet members review and prioritize the information and make decisions. As appropriate and needed, recommendations may be forwarded to the President and Board of Education for final approval. The Cabinet is responsible for sharing decisions about prioritization and resource allocations back to stakeholders.

If you have multiple requests, you may create as many budget requests as needed. If you have more than one department, you may submit requests for each department.

Please refer to your adopted budget (FY24-25) for the current year in the Banner Finance module to help with your planning for next year. Please check with the Foundation before completing the form to determine your available balance.

Note that this process does NOT supersede or take the place of other existing processes

(e.g. LETS, classified positions, etc.) but will be used as an information gathering tool that

will flow into other resource allocation processes.

All resource requests will be taken into consideration within the current context of fiscal challenges.

Logging in to Axiom:

In Order to access Axiom software, you will need the link. The link has been

included below for your convenience. Once there, you will need to log in by

clicking on the Lane SSO button as indicated in the picture to the right.

Link: https://lanecc-sandbox2.axiom.cloud/

Tip: Bookmark the link to your web browser
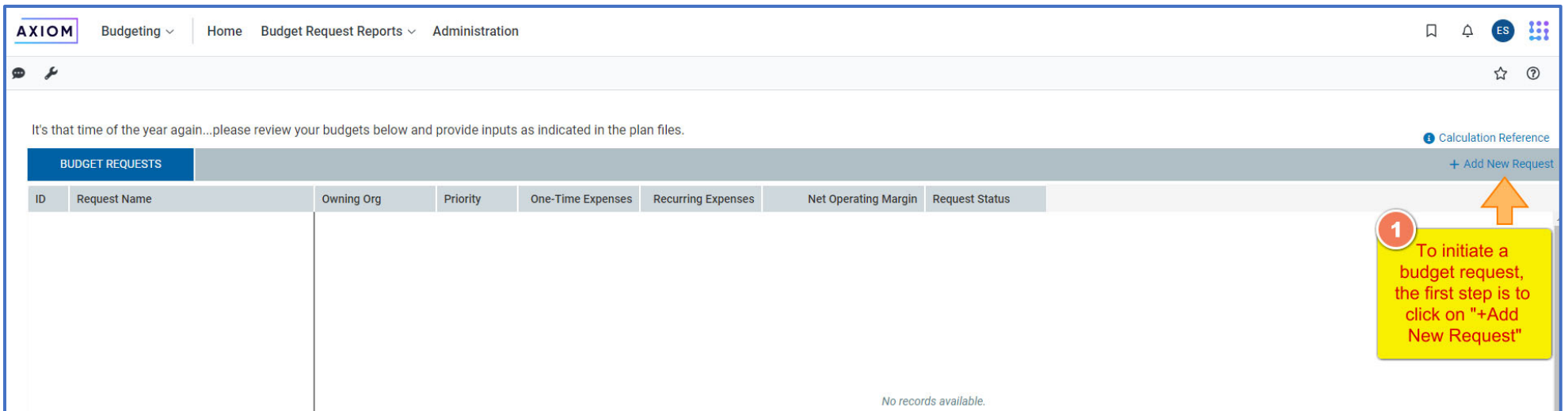
Once you are logged on, your dashboard will look like the picture below.
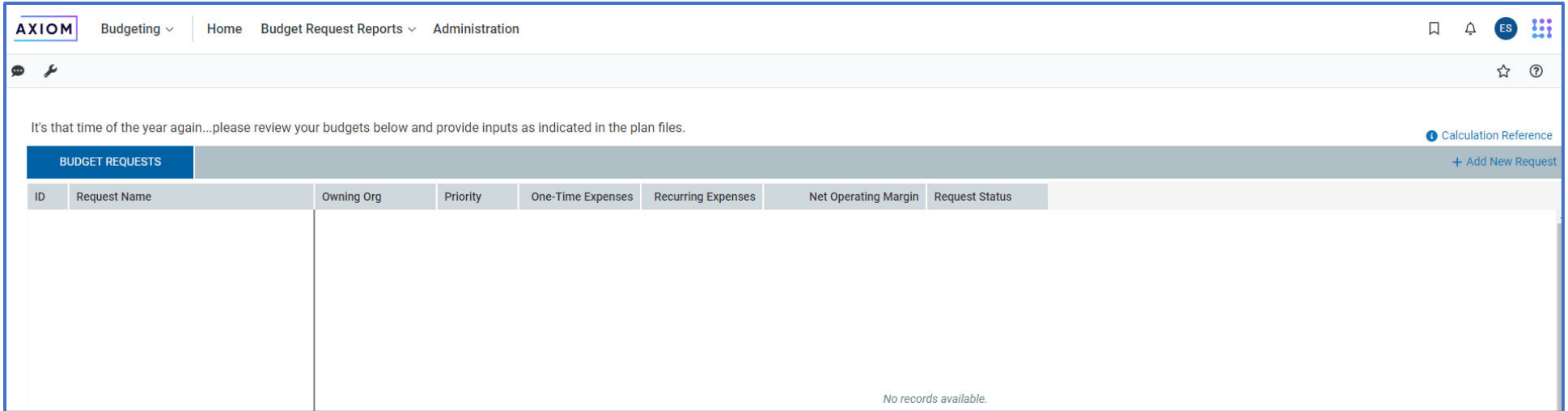
Creating a budget request:

In order to create a budget request, click on the "+ Add New Request" as indicated in the picture below.

In order to create a Budget Request, the fields as shown in the picture to the right will need to be filled out. The budget request will be created when the "Create Request" button is click on. A pop-up will appear asking "Create Budget Request", to still proceed click on "OK" as indicated in the picture below.

Axiom Software ✕

Create Budget Request?

OK   Cancel
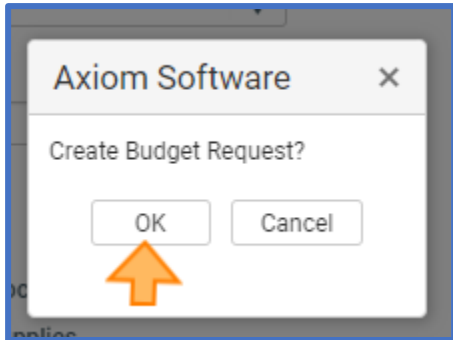
New Budget Request ✕

Populate the fields below to create a new budget request for fiscal year 2025

Request Name: (100 character max.)

ACG Test2

1 Enter title

Select Owning Org:

d201100 ▼

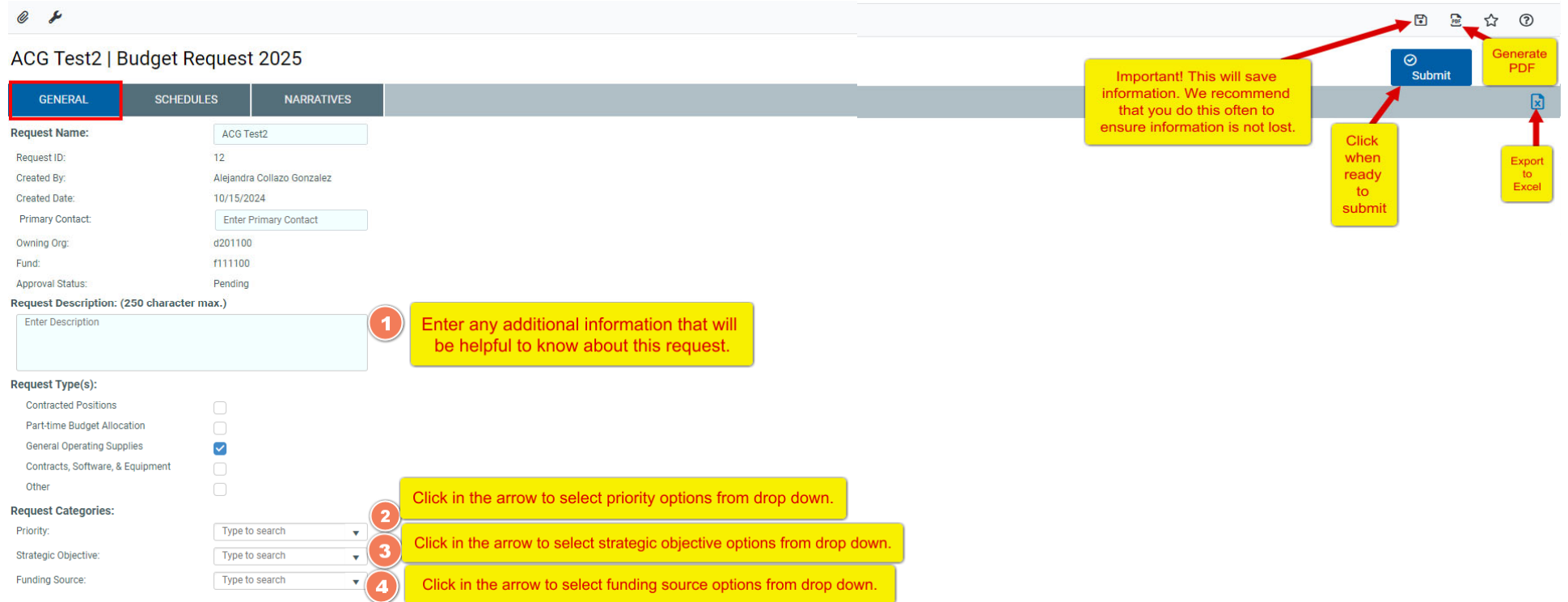**2** Click on down arror to select ORG that appllies to request.

Select Fund:

f111100 ▼

3 Important to note, that the "Select Fund" will appear once ORG has been selected.

Request Type(s):

◯ Contracted Positions

◯ Part-time Budget Allocation

☑ General Operating Supplies

◯ Contracts, Software, & Equipr

◯ Other

4 Select type of request

Cancel   **Create Request**

5 Click "Create Request" to proceed.

Once the prior steps are completed, your screen will look like the picture below. Off to the right of the picture we have identified what some of the symbols mean. And on the left we have illustrated the steps needed to continue creating the budget request. It is important to note that this information is for the tab titled "GENERAL". Once this information is completed click on the 🖫 icon located on the top right to save the information entered before proceeding further.

The next step in creating a Budget Request will be to click on "SCHEDULES". This tab is located to the right of the "GENERAL" tab where the prior step was completed. In the SCHEDULES tab, the appropriate account for the request being created will be selected. As seen in the picture to the right, the accounts are broken down into three groups. the first is Revenue, the second is Personnel Expense, with other Expense being the final category. Select the account That is appropriate for the request being created.

Once the appropriate account category is selected a pop-up box as the one shown to the right will appear. Click on the down arrow to see the list of options available. Once the account has been selected, click "Apply" to proceed.

Once the account has been selected, the Fund will be populated as it was entered at the beginning. The middle column will be where the amount of the request can be entered along with any additional comments. All these areas are illustrated in the picture to the right. Lastly click on the 💾 icon located on the top right to save the information entered.

Tip: If more than one account is necessary for your request, simply repeat previous steps.

ACG Test2 | Budget Request 2025

| GENERAL | SCHEDULES | NARRATIVES | | |

Account	Fund	Proposed Budget 2025	Comments	
▼ **Revenue**				
+ Add Revenues Account				
Total Revenue		0		
▼ **Personnel Expense**				
+ Add Personnel Expense Account				
Total Personnel Expense		0		
▼ **Other Expense**				
613800 - Staff Development	f111100 ▼	0		
+ Add Direct Expenditures Account				
Total Other Expense		0		
Total Expenses		0		
Net Operating Result		0		

Amount entere here.

Any comments, not necessary

The last tab of information that should be filled out is "NARRATIVES". This tab is composed of a set of three questions that should be answered in order to provide additional information pertaining to the budget request being submitted.

The last step required to submit the budget request

Is to click on "Submit" which is located on the top right.

Please note that clicking "Submit" will automatically

Save the information entered and send the budget

Request to the next step in the workflow process.

To view a summary of the Budget Requests submitted, click on "Home" located on the top ribbon as illustrated in the picture below. Then click on the "BUDGET REQUESTS" tab. Once there you will see the budget requests entered. The ⬈ icon to the left of the Request Name allows easy navigation back into the request itself.
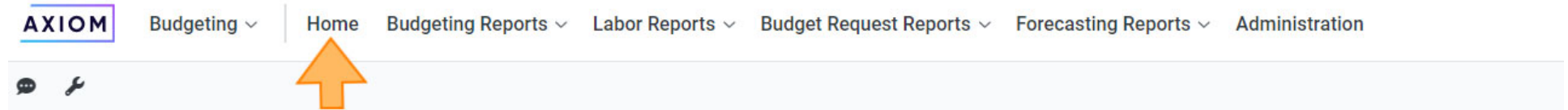
It's that time of the year again...please review your budgets below and provide inputs as indicated in the plan files.

	BUDGETING		LABOR PLANNING		BUDGET REQUESTS		FORECASTING		
ID	Request Name		Owning Org	Priority	One-Time Expenses	Recurring Expenses		Net Operating Margin	Request Status
2	⬈ KA Test Request		d101001	Default	$0	$0		$0	Pending
3	⬈ JC Test		d100025	Default	$0	$0		$0	Pending