



# AXIOM USER GUIDE

Budget Initiators || Approvers

## FIRST EDITION

This training guide is an evolving document, first developed during the final implementation stages of the cloud-based budget and planning software program, Axiom by Kaufman Hall. The Kern Community College District 2022-23 budget planning process, which begins in Fall 2021, will implement this new software. Roll-out and hands-on training sessions will occur in Fall 2021. Updates, training enhancements, and ongoing support will be available to all Axiom users at all stages of the budgeting process.



# AXIOM USER GUIDE

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## **Before You Begin... Welcome to Axiom!**

The Kern Community College District budget represents our commitment to providing a high-quality education to all students and ensuring access to programs aimed at student success. Each year, a department or unit will submit an operating budget request for the following academic year. This planning phase should reflect the overall priorities of the department or unit. The phase includes an examination of prior year expenses, analysis of changing conditions, and review of trends.

We are pleased to introduce Axiom Budgeting and Planning from Syntellis specifically designed for Higher Education, an online tool replacing Excel worksheets for development of this year's 2022-23 budget plan. Major enhancements with implementation of Axiom include a streamlined process utilizing cloud-based worksheets, increased collaboration, role-based security, and automated workflows. At midyear, we will roll out these features for our grants and categorical programs.

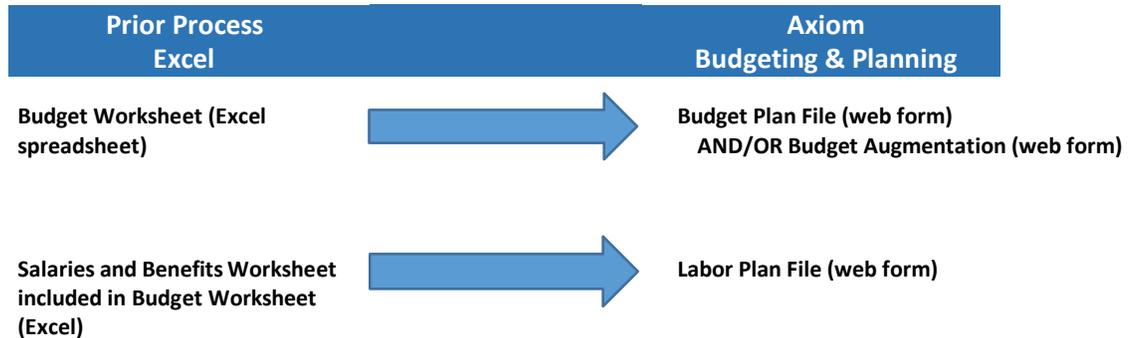
### **What is Axiom?**

The Axiom Budgeting & Forecasting platform integrates Kern Community College District's Finance, Human Resources and Payroll data from Ellucian Banner into a single repository for planning. Using robust data integration tools, Axiom automates the integration of data from this system, as well as off-line spreadsheets directly into the Axiom database. Validation and alerting tools ensure data issues can be addressed and resolved quickly and in an automated fashion. Axiom will not replace Ellucian Banner for day-to-day fiscal monitoring and reporting.

### **Driver Based Model**

To respond to ever changing business realities, Kern Community College District, like other organizations, must quickly model and adapt financial plans to course correct and optimize performance. In a planning model, financials are outcomes - not inputs. Axiom leverages an easy-to-use global driver library to incorporate custom operational drivers into a financial planning model.

## What do I need to know- what will be different?



## Roles and Responsibilities:

- **Budget Input**
  - BUILDS THE BUDGET
  - First user to engage with the planfile and the individual responsible for submitting personnel and non-personnel expense requests
  - Reallocates funds within the individual program planfiles
  - Communicates with department members and submits planfile to department budget approver
- **Budget Review**
  - UNDERSTANDS THE IMPACT OF THE BUDGET
  - Reviews and provides edits for the prepared planfile and reallocations.
  - Approver has permission to edit; however, best practice is returning to Initiator
  - Reviews, approves & submits planfile to VP Budget Review.
  - Note: Not all budgets will route through a Budget Approver. Some may route directly to a VP Budget Review.
- **VP Budget Review**
  - FINAL BUDGET APPROVAL
  - Submits planfiles to Budget Office.
  - Includes:
    - KCCD: Chancellor; Vice Chancellor
    - Colleges: President and Vice Presidents
- **Budget Office Review**
  - COMPLIANCE REVIEW
  - Reviews the requests to ensure appropriate FOAPAL coding and completeness.
  - Once reviewed, submits planfiles for Budget Committee Review / Tentative Budget Recommendation.

## Home Page General Navigation

### Logging In to Axiom - Getting Started

- 1.) First step is open up an internet browser
- 2.) Login at <https://kccd.axiom.cloud>

Use your KCCD Login (Outlook Username and Password)

*Be sure to mark this site as safe for displaying pop-up windows.*

PLEASE SIGN IN.

Username

Password

Login

Forgot Password?

BAKERSFIELD  
COLLEGE  
PORTERVILLE  
COLLEGE

CERRO COSO  
COMMUNITY COLLEGE  
KCCD  
KERN COMMUNITY COLLEGE DISTRICT

Homepage will look similar to this:



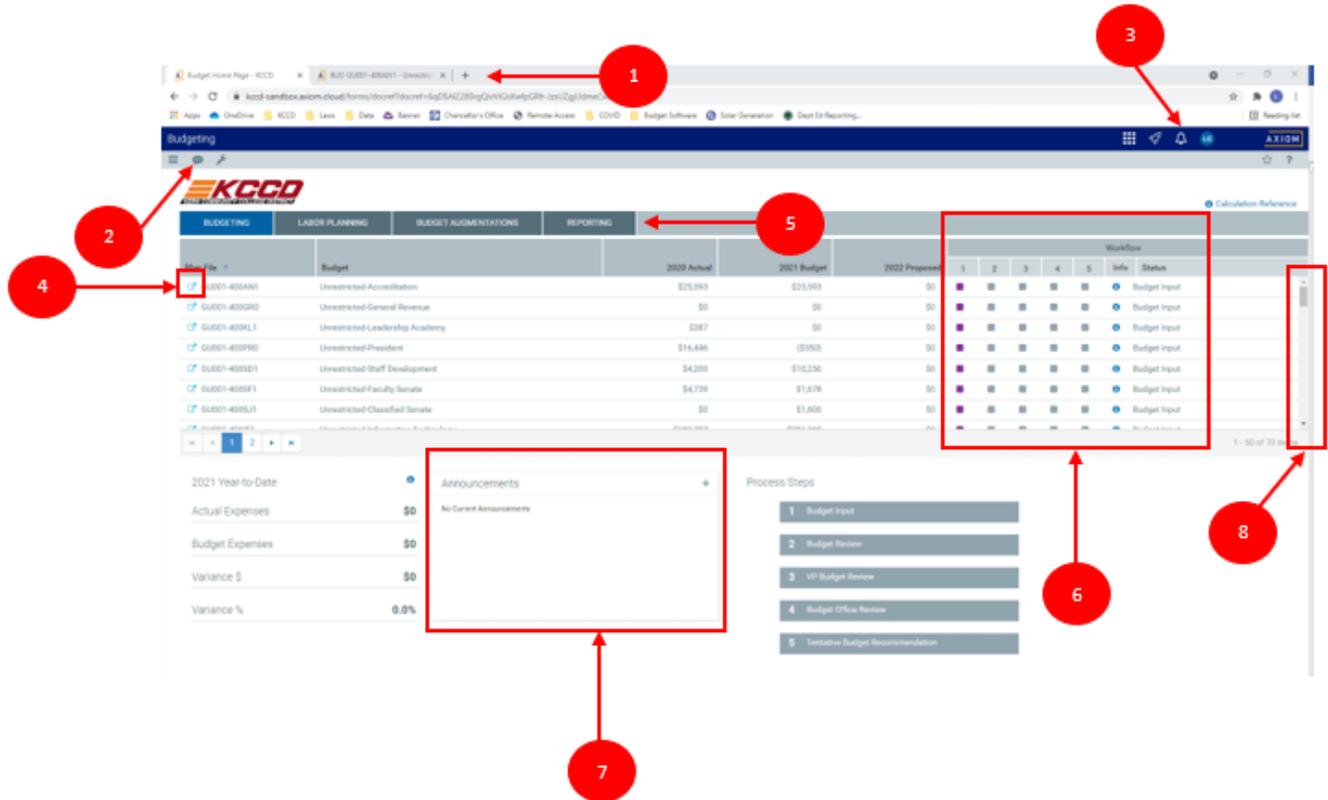
The screenshot shows the KCCD Axiom Budgeting interface. At the top, there is a navigation bar with tabs for BUDGETING, LABOR PLANNING, BUDGET AUGMENTATIONS, and REPORTING. Below the navigation bar, there is a table with columns for Plan File, Budget, and 2020 Actual. The table contains several rows of budget items, each with a link icon, a plan file ID, a budget description, and a 2020 actual value.

Plan File	Budget	2020 Actual
<a href="#">GU001-100GR0</a>	Unrestricted-General Revenue	\$4,737
<a href="#">GU001-10AIR1</a>	Unrestricted-Institutional Reporting	\$43,501
<a href="#">GU001-110ES1</a>	Unrestricted-Edu Svcs. - Operating Budget	\$17,712
<a href="#">GU001-110LA0</a>	Unrestricted-Leadership Academy	\$47,850
<a href="#">GU001-110WT1</a>	Unrestricted-WESTEC Contract	\$193,967
<a href="#">GU001-11BA01</a>	Unrestricted-CCPT2 - District	\$45,980
<a href="#">GU001-11BWD1</a>	Unrestricted-Economic & Workforce Development	\$12,718
<a href="#">GU001-120BS0</a>	Unrestricted-Admin Svcs - Operating Budget	\$548,630

Note: Your homepage may look different as it will only display the budgets that you are responsible for requesting.

Expand screen to full view of the home page.

Basic page navigation



1 – Navigation tabs currently open – Each plan file opens in a new navigation tab

2 – Messages – These messages are visible to ALL users and should not be used by requestors or approvers. This may be used by the Budget Office to communicate broadly with KCCD requestors and/or approvers.

3 – Notifications – If you have current notifications, a number will be displayed here. See page 7 in this document for additional information regarding notifications.

4 – Select this icon to drill down to the plan file

5 – Navigation tabs for budgeting, labor planning, and budget augmentation

6 – Workflow – Indicates the workflow status for each planfile

7 – Announcements – Budget Offices will use the announcement feature to communicate broadly with requestors and/or approvers. These will be visible to all KCCD requestors and/or approvers immediately upon accessing the system.

8 – Scroll to see additional planfiles.

After the individual planfile is selected, you will see the specific details associated with that planfile.

The screenshot displays the Axiom Budgeting interface. At the top, there are navigation tabs: BUDGETING, LABOR PLANNING, BUDGET AUGMENTATIONS, and REPORTING. Below these is a table of budget items with columns for Plan File, Budget, 2020 Actual, 2021 Budget, 2022 Proposed, and a Workflow section with steps 1-5 and Info/Status columns.

Plan File	Budget	2020 Actual	2021 Budget	2022 Proposed	1	2	3	4	5	Info	Status
GU001-400GR0	Unrestricted-General Revenue	\$0	\$0	\$0	■	■	■	■	■	📘	Budget Input
GU001-400KL1	Unrestricted-Leadership Academy	\$387	\$0	\$0	■	■	■	■	■	📘	Budget Input
GU001-400PR0	Unrestricted-President	\$16,446	(\$350)	\$0	■	■	■	■	■	📘	Budget Input
GU001-400SD1	Unrestricted-Staff Development	\$4,200	\$10,250	\$0	■	■	■	■	■	📘	Budget Input
GU001-400SF1	Unrestricted-Faculty Senate	\$4,739	\$1,678	\$0	■	■	■	■	■	📘	Budget Input
GU001-400SJ1	Unrestricted-Classified Senate	\$0	\$1,600	\$0	■	■	■	■	■	📘	Budget Input
GU001-406IT1	Unrestricted-Information Technology	\$182,707	\$281,360	\$0	■	■	■	■	■	📘	Budget Input

Below the table, there are three summary panels:

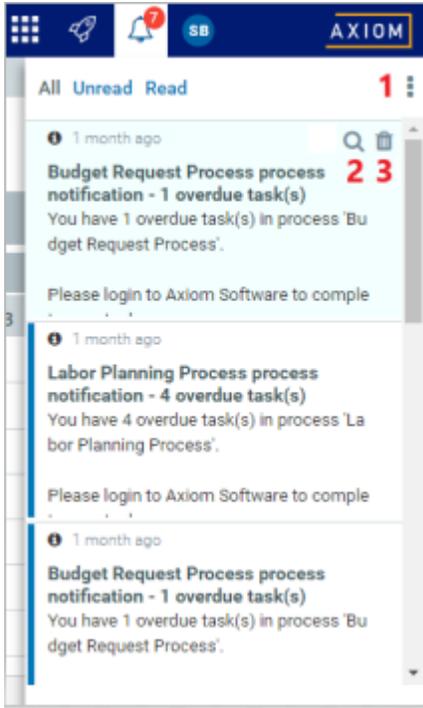
- 2021 Year-to-Date:**
  - Actual Expenses: **\$38,840**
  - Budget Expenses: **\$408,268**
  - Variance \$: **\$369,428**
  - Variance %: **90.5%**
- Announcements:** No Current Announcements
- Process Steps:**
  - 1 Budget Input (Active)
  - 2 Budget Review
  - 3 VP Budget Review
  - 4 Budget Office Review
  - 5 Tentative Budget Recommendation

## Notifications

Tasks related to pending Workflow processes will be alerted through the Notifications icon :

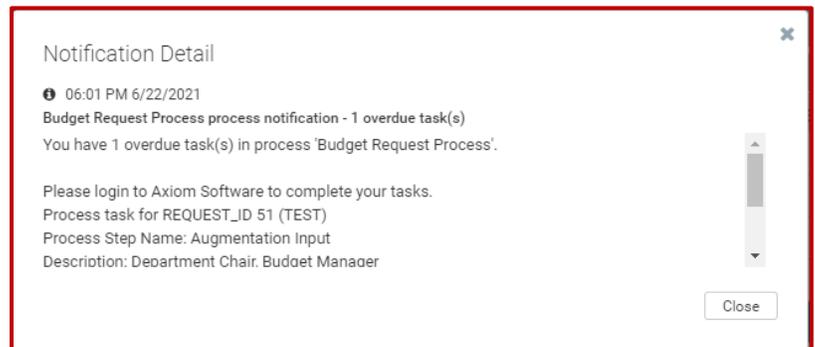


Once clicked on, it will show all notifications:



1 – Options to Select All, Mark Read, Mark Unread, and Delete

2 – Magnifying Glass to Open Notification



3 - Trash Can to Delete Notification

## Start with Labor Planning



BUDGETING	LABOR PLANNING	BUDGET AUGMENTATIONS	REPORTING	
Plan File ↑		Budget		2020 Actual
<a href="#">GU001-100GR0</a>		Unrestricted-General Revenue		\$4,737
<a href="#">GU001-10AIR1</a>		Unrestricted-Institutional Reporting		\$43,501
<a href="#">GU001-110ES1</a>		Unrestricted-Edu Svcs. - Operating Budget		\$17,712
<a href="#">GU001-110LA0</a>		Unrestricted-Leadership Academy		\$47,850
<a href="#">GU001-110WT1</a>		Unrestricted-WESTEC Contract		\$193,967
<a href="#">GU001-11BA01</a>		Unrestricted-CCPT2 - District		\$45,980
<a href="#">GU001-11BWD1</a>		Unrestricted-Economic & Workforce Development		\$12,718
<a href="#">GU001-120BS0</a>		Unrestricted-Admin Svcs - Operating Budget		\$548,630

Navigation: 1 2 3 4 5 ...

Each budget initiator will have access to only those labor planning planfiles that they are responsible for. If an individual is responsible for more than one planfile, the planfiles may be filtered by floating the cursor over the right side of the “PlanFile” column heading and the filter icon will appear. If filtering, we strongly encourage you to use the “Contains” criteria.

Below are instructions for General Unrestricted Fund labor planning and Restricted/Grant/Categorical program labor planning. As a requestor, you may need to use one or both of these processes.

**Note: Even if you are not requesting any budget for temporary labor, you must submit a zero request labor planning planfile.**

## General Unrestricted Fund (GU001)

### Understanding & Using the Labor Plan Files

**Budgeting**

GU001-211AC0  
Unrestricted-Arvin Center | 2022 Labor Planning

OVERVIEW OTHER LABOR SUMMARY

#### 2022 Labor Planning

Hi Lisa,

Welcome to budgeting for 2021-22. Please remember that this is just one step in submitting a complete budget. You'll also need to complete the work in this section, as well as the Budgeting and Below are high-level directions for submitting your labor budget. For more detailed instructions, please visit xxx.

**Process**

- From the Other Labor tab, select "add pooled position" to the appropriate temporary labor category. Benefits will automatically be calculated.
- Upon completion of the labor review, return to the Budget tab to continue finalizing your 2021-22 budget.

**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 (not changeable) 12,345

User input or editable cell

Distributions exceed 100% ▲

Shared distributions ▲▲

After reviewing the overview tab, proceed by selecting the Other Labor tab.

### Other Labor = Pooled Positions / Temporary Labor

In this tab of the Labor Plan file, lump sum amounts or budget pools should be added for all temporary labor. You will note that there are nineteen categories of temporary labor including both instruction and non-instructional student workers, professional experts, and part-time/additional assignment faculty positions.

**Budgeting**

GU001-200C1  
Unrestricted-One Card Program | 2022 Labor Planning

OVERVIEW OTHER LABOR SUMMARY

Pooled Positions

Delete	Pooled Position	Organization	Fund	Planning	Acct	2022 Projected Budget	Benefits %	Amount	Plan 2022	Comments
<b>Adjunct Acad Emp - Non-Cont</b>										
+ Add Adjunct Acad Emp - Non-Cont Position										
Total Adjunct Acad Emp - Non-Cont						0		0	0	
<b>Acad Emp - Intercession</b>										
+ Add Acad Emp - Intercession Position										
Total Acad Emp - Intercession						0		0	0	
<b>Acad Emp - Overload</b>										
+ Add Acad Emp - Overload Position										
Total Acad Emp - Overload						0		0	0	
<b>Acad Emp-Inst Non-Cont Stipend/Othr</b>										
+ Add Acad Emp-Inst Non-Cont Stipend/Othr Position										
Total Acad Emp-Inst Non-Cont Stipend.						0		0	0	
<b>Acad Emp-Non-Cont Substitute</b>										
+ Add Acad Emp-Non-Cont Substitute Position										
Total Acad Emp-Non-Cont Substitute						0		0	0	
<b>Educational Admin - Non-Cont</b>										
+ Add Educational Admin - Non-Cont Position										
Total Educational Admin - Non-Cont						0		0	0	

## ADDING POOLED POSITIONS

Under the appropriate category of temporary labor, select the “+” feature.

Fund	Planning	Acct	2022 Projected Budget	Benefits %	Amount	Plan 2022	Comments
			0	0	0		

Calc Method Variables

Position Name

Fund\_Organization

Planning

Acct

- **POSITION NAME:** Enter a position title that is clear to both you and the Budget Office. The title should be descriptive of the work associated with the temporary labor budget request.
- **FUND\_ORGANIZATION:** From the drop down for fund\_organization, select the appropriate planfile. Note: There should only be one option to select based on the planfile that was initially selected.
- **PLANNING:** From the drop down for planning, begin entering the appropriate program code. The results will be filtered as you continue to type the program code. Select the appropriate combination of program code, activity code, and location code for this request. In some cases, there may not be an activity code or location code needed. If you cannot locate the combination you would like to use, this is because there has not been activity in the combination. Please contact your budget office so that the combination can be added.
- **ACCT:** From the drop down for Acct, select the appropriate account code. Note: There should only be one option for each temporary labor category.
- Once all fields are completed, select .

The information that you entered will now be displayed as a new line where you will enter your budget request.

Delete	Pooled Position	Organization	Fund	Planning	Acct	2022 Projected Budget	Benefits %	Amount	Plan 2022	Comments
<b>Adjunct Acad Emp - Non-Cont</b>										
+ Add Adjunct Acad Emp - Non-Cont Position										
Total Adjunct Acad Emp - Non-Cont						0		0	0	
<b>Acad Emp - Intersession</b>										
+ Add Acad Emp - Intersession Position										
Total Acad Emp - Intersession						0		0	0	
<b>Acad Emp - Overload</b>										
+ Add Acad Emp - Overload Position										
Total Acad Emp - Overload						0		0	0	
<b>Acad Emp-Inst Non-Cont Stipend/Othr</b>										
<input type="checkbox"/>	Testing	20IOC1	GU001	010100-...	1340	0	19.6%	0	0	
+ Add Acad Emp-Inst Non-Cont Stipend/Othr Position										
Total Acad Emp-Inst Non-Cont Stipend/Othr						0		0	0	
<b>Acad Emp-Non-Cont Substitute</b>										
+ Add Acad Emp-Non-Cont Substitute Position										
Total Acad Emp-Non-Cont Substitute						0		0	0	
<b>Educational Admin - Non-Cont</b>										
+ Add Educational Admin - Non-Cont Position										

In the projected budget column, enter the salary amount for the requested position and either hit enter or tab. You will notice that the benefits budget for the position will automatically calculate based on the pre-determined benefit rate. The total requested amount will reflect both the salary and benefit budget request. You may also enter any comments related to this request in the comment field.

Delete	Pooled Position	Organization	Fund	Planning	Acct	2022 Projected Budget	Benefits %	Amount	Plan 2022	Comments
<b>Adjunct Acad Emp - Non-Cont</b>										
+ Add Adjunct Acad Emp - Non-Cont Position										
Total Adjunct Acad Emp - Non-Cont						0		0	0	
<b>Acad Emp - Intersession</b>										
+ Add Acad Emp - Intersession Position										
Total Acad Emp - Intersession						0		0	0	
<b>Acad Emp - Overload</b>										
+ Add Acad Emp - Overload Position										
Total Acad Emp - Overload						0		0	0	
<b>Acad Emp-Inst Non-Cont Stipend/Othr</b>										
<input type="checkbox"/>	Testing	20IOC1	GU001	010100-...	1340	10,000	19.6%	1,962	11,962	
+ Add Acad Emp-Inst Non-Cont Stipend/Othr Position										
Total Acad Emp-Inst Non-Cont Stipend/Othr						10,000		1,962	11,962	
<b>Acad Emp-Non-Cont Substitute</b>										
+ Add Acad Emp-Non-Cont Substitute Position										
Total Acad Emp-Non-Cont Substitute						0		0	0	
<b>Educational Admin - Non-Cont</b>										
+ Add Educational Admin - Non-Cont Position										

After adding all temporary labor requests -- SAVE YOUR WORK

Once all requests have been entered and saved, select the SUMMARY tab to confirm the request being submitted. Each temporary position category will be listed separately and will display the total request, the salary amount, and the benefit amount.

Account	2021 Budget	2022 Budget	Variance	2022 Plan	
				Pooled Positions	Benefits
1340 - Acad Emp-Inst Non-Cont Stipend/Othr	0	11,962	100.0%	10,000	1,962
<b>Total Home Labor Budget</b>	<b>0</b>	<b>11,962</b>	<b>100.0%</b>	<b>10,000</b>	<b>1,962</b>

Once you confirm that this information is accurate, select SUBMIT.

Requests submitted through labor planning will transfer to the budget plan file so that requestors have a complete picture of their budget request.

**All temporary labor must be budgeted in the Other Labor tab.**

**Requests for new, permanent positions should be made through the college planning documents, not through Axiom.**

### Important to Understand – Benefits

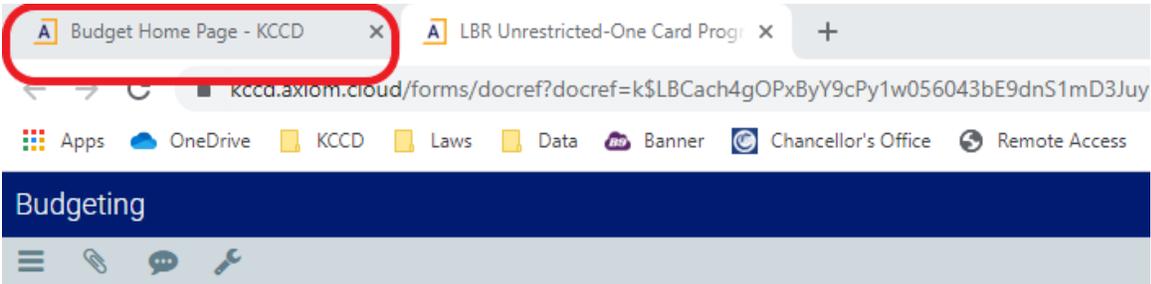
**Benefits:** A planning change you will see for unrestricted general fund budgeting is the inclusion of benefits in labor budgeting process.

**Benefit Rates:** Axiom Labor Plan combines the benefits that each position category or employee is eligible for. Although this is a combined benefit rate for the purposes of planning in Axiom, benefits will be budgeted in Ellucian Banner by individual benefit account code.

## Budgeting for Non-Labor



When you have submitted the Labor Planning salary requests, return to the Budget Home Page Tab, still featured above the taskbar. From the Home Page, select the Budgeting tab to begin.

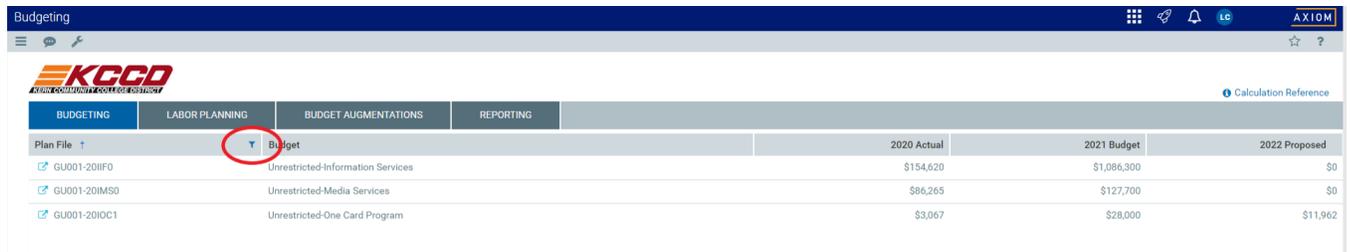


Each budget initiator will have access to only those budget planfiles that they are responsible for. If an individual is responsible for more than one planfile, the planfiles may be filtered by floating the cursor over the right side of the “Planfile” column heading and the filter icon will appear. If filtering, we strongly encourage you to use the “Contains” criteria.

All requests, including one-time requests should be included in the Budgeting tab – EXCEPT as outlined by each college, such as those related to resource requests including Maintenance & Operations, Information Technology, Marketing, and Professional Development.

### Selecting the budget Planfile

Budget Plan Files Home Page – looks similar to earlier screen shots for Labor Planning Home Page.



Select the icon to the left of the Planfile to begin planning non personnel expenses and revenue.

BUDGETING		LABOR PLANNING	BUDGET AUGMENTATIONS	REPORTING		
Plan File ↑	▼	Budget			2020 Actual	2021 Budget
GU001-20IIF0		Unrestricted-Information Services			\$154,620	\$1,086,300
GU001-20IMS0		Unrestricted-Media Services			\$86,265	\$127,700
GU001-20IOC1		Unrestricted-One Card Program			\$3,067	\$28,000

## Initial view

Budgeting
AXIOM

GU001-20IOC1
☆ ?

OVERVIEW
BUDGET
PLANNING REVIEW
CONSOLIDATED SUMMARY
NARRATIVES
☰

### 2022 Budgeting

Hi Lisa,

Welcome to budgeting for 2021-22. In order to submit a complete budget, you'll need to complete the work in this section, as well as the Labor Planning and Budget Augmentation tabs on the Below are high-level directions for submitting your budget. For more detailed instructions, please visit xxx.

**Process**

1. Be sure to review each Program, Activity, and Location codes combination in the Budget tab by selecting each one individually in the "Planning" list. Note that the "Planning" list, historically lists the Program, Activity, and Location codes that have had previous activity.
2. Complete the fields in the Budget tab.
3. On the previous screen, select Labor Planning to:
  - a. Review the distribution and amounts for each permanent position. Contact the Budget Office if there are corrections.
  - b. If needed, you can add temporary labor to your budget in Other Labor.
4. If you have any budget requests that need to be evaluated by a resource area (Facilities, Information Technology, or Professional Development), complete the Budget Augmentation request on the previous screen. After completing any requests on the Labor Budget Augmentation screens, return here to review the results in the Consolidated Summary 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 editable cell	\$1,000

After reviewing the overview tab, proceed by selecting the Budget tab.

## Budget Tab

Budget Group	Actual 2020	Actual 2021	Actual Sep YTD FY2022	Budget 2022	Starting Point	Proposed Budget 2023	Budget Augmentations 2023 One-Time	Budget Augmentations 2023 Recurring	Final Budget 2023	Comments
<b>Non Labor Expenses</b>										
Supplies & Materials	37,819	29,018	4,301	0		0	0	0		
4313 - Non-Net Supplies & Materials	37,819	28,002	4,301	0	Zero Based	0	0	0		
4320 - Vehicle Supplies - Parts	0	1,016	0	0	Zero Based	0	0	0		
Service/Utilities/Operating Exp.	18,342	38,281	15,280	0		0	0	0		
5220 - Employee Travel	1,059	0	0	0	Zero Based	0	0	0		
522007 - Employee Travel DO	129	0	0	0	Zero Based	0	0	0		
5602 - Short Term Rental/Veh & Equip	0	386	0	0	Zero Based	0	0	0		
5650 - Software Licensing/Maintenance Svcs	4,568	21,682	5,834	0	Zero Based	0	0	0		
5651 - Internet Access	0	340	0	0	Zero Based	0	0	0		
5655 - Computer Hardware Maint Agreements	12,537	15,779	9,716	0	Zero Based	0	0	0		
Capital Outlay	8,784	8,325	1,877	0		0	0	0		
6412 - Computer/Technology Equipment	8,784	8,325	1,877	0	Zero Based	0	0	0		
<b>Total Non Labor Expenses</b>	<b>64,945</b>	<b>75,743</b>	<b>21,378</b>	<b>0</b>		<b>0</b>	<b>0</b>	<b>0</b>		
<b>Total Expenses</b>	<b>64,945</b>	<b>75,743</b>	<b>21,378</b>	<b>0</b>		<b>0</b>	<b>0</b>	<b>0</b>		
<b>Net Operating Result</b>	<b>(64,945)</b>	<b>(75,743)</b>	<b>(21,378)</b>	<b>0</b>		<b>0</b>	<b>0</b>	<b>0</b>		

Pay close attention to:

1 Attachment

- Requestor has the ability to add attachments that relate to their budget request(s) for this planfile.

2 Planning block

- Within each planfile, there may be several planning blocks which represent program-activity-location code combinations
- Planning blocks are based on combinations used in the current year or two previous years.
  - If the program-activity-location code combination does not exist as a planning block, please contact your campus budget office.
- Be sure to select the appropriate planning block before reviewing and entering a budget request.
  - You can move between planning blocks by selecting the hamburger next to the planning block. This will display all planning blocks with budget or activity over the last three years.
  - If you need to submit a budget request for a planning block that is not available in your planfile, contact your budget office.
- Requestors may enter budget requests on multiple planning blocks, as needed.
- Please see section on budget augmentations for specific budget requests that should not be made through the Budgeting planfile.**

3 Two years of historical expense data

4 Current year adopted budget

5 Next year budget request

- Enter the amount requested for each account, with the exception of requests that fall within the

- budget augmentation guidelines outlined later in this document.
  - To add an account that is currently not visible for within a planning block, please see next section.
  - Be sure to SAVE YOUR WORK regularly.
- 6 Comments related to next year budget request
    - Entered by requestor or reviewer specific to this FOAPAL budget request.
  - 7 Scroll bar

As a requestor, be sure to review each of the planning blocks to ensure that your budget request is complete prior to reviewing the consolidation summary tab.

## Requesting a budget

To request a budget, enter the amount in the proposed budget column (section 5 above).

Although you cannot submit a request for temporary labor through the budget planfile, you will notice that any temporary labor that you requested through the labor planfile has been brought forward to the budget planfile.

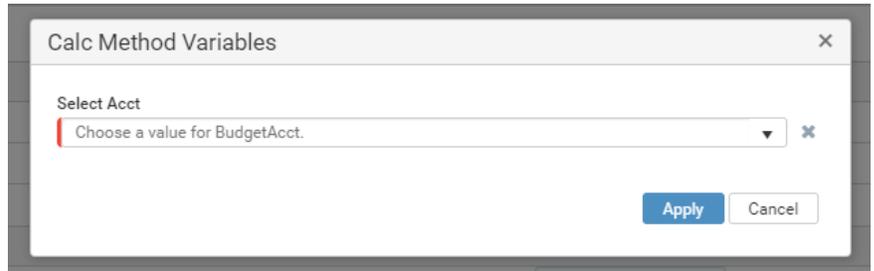
Select “Save” after entering all budget requests by planning block.

## Adding new accounts to a planfile / planning block

To submit a budget request for an account that is not listed within the planfile and planning block, under the appropriate non-labor expense category, select to add.

Budget Group	Actual 2020	Actual 2021	Actual Sep YTD FY2022	Budget 2022	Starting Point	Proposed Budget 2023	Budget Augmentations 2023 One-Time	Budget Augmentations 2023 Recurring	Final Budget 2023	Comments
<b>Non Labor Expenses</b>										
Supplies & Materials	37,819	29,018	4,301	0	Zero Based	25,000	0	0	25,000	
4313 - Non-Inst Supplies & Materials	37,819	28,002	4,301	0	Zero Based	25,000	0	0	25,000	
4300 - Vehicle Supplies - Parts	0	1,016	0	0	Zero Based	0	0	0	0	
<b>+ Add Supplies &amp; Materials</b>										
Utilities/Operating Exp.	18,342	38,201	15,200	0	Zero Based	16,200	0	0	16,200	
5220 - Employee Travel	1,069	0	0	0	Zero Based	0	0	0	0	
52200T - Employee Travel DO	129	0	0	0	Zero Based	200	0	0	200	
5602 - Short Term Rental/Veh & Equip	0	386	0	0	Zero Based	0	0	0	0	
5650 - Software Licensing/Maintenance Svcs	4,608	21,682	5,484	0	Zero Based	6,000	0	0	6,000	
5651 - Internet Access	0	360	0	0	Zero Based	0	0	0	0	
5650 - Software Licensing/Maintenance Svcs	12,537	15,773	9,716	0	Zero Based	10,000	0	0	10,000	
<b>+ Add Service/Utilities/Operating Exp.</b>										
Capital Outlay	8,784	8,525	1,877	0	Zero Based	0	0	0	0	
4343 - Service/Utilities/Operating Exp.	8,784	8,525	1,877	0	Zero Based	0	0	0	0	
<b>+ Add Capital Outlay</b>										
<b>Total Non Labor Expenses</b>	<b>64,945</b>	<b>75,743</b>	<b>21,378</b>	<b>0</b>		<b>41,200</b>	<b>0</b>	<b>0</b>	<b>41,200</b>	

Once selected, a pop-up window will appear where it prompts for you to select the account from a drop-down menu. To identify the account you wish to add, either scroll through the drop-down or begin to type either the account code or the description to narrow down the results.



Select “Apply”.

The new account is now added to the budget tab and you can proceed with budgeting by entering an amount in the proposed budget column.

Note: If there are no expense categories, select “Insert Budget Group”. From the pop-up window, select the appropriate expense category and then proceed with the above directions on adding an account to the newly added expense category.

Select “Save” after entering all budget requests by planning block.

## Planning Review

The Planning Review tab will display the current year adopted budget, the consolidated budget request, and the variance. This information is specific to the planfile selected. In addition, it provides a high level summary by planning block.

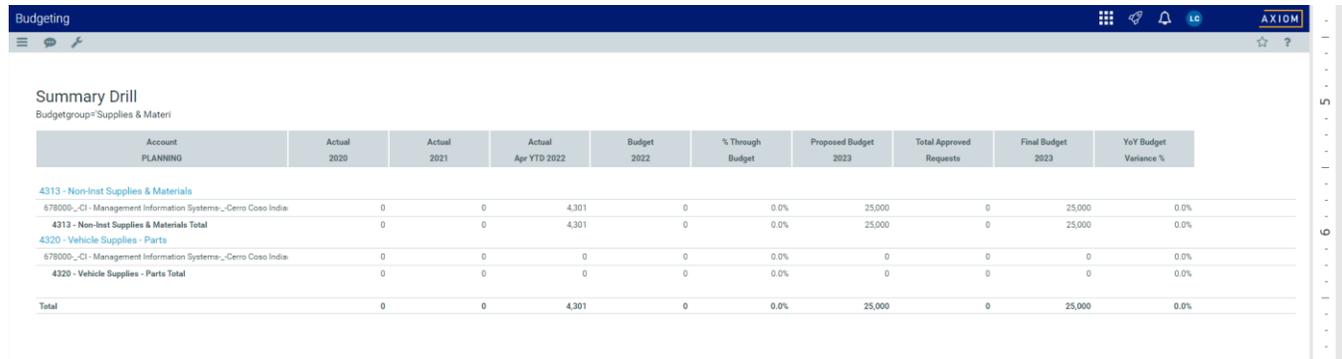
Budgeting											
GU001-4061T1 Unrestricted-Information Technology   Budget											
OVERVIEW	BUDGET	PLANNING REVIEW	CONSOLIDATED SUMMARY	NARRATIVES							
Budget Category	Budget 2022	Total 2023	Variance	677090-CIC021-CI Other Logistic Services-	677099-CIC021-CI Other Logistical	678000_-CB Management Information	678000_-CI Management Information	678000_-CK Management Information	678000_-CM Management Information	678000_-CS Management Information	678000_-CT Management Information
<b>Revenues</b>											
Total Revenues	0	0	0.0%	0	0	0	0	0	0	0	0
<b>Labor Expenses</b>											
Total Labor Expenses	-	-	0.0%	-	-	-	-	-	-	-	-
<b>Non Labor Expenses</b>											
Supplies & Materials	0	25,000	100.0%	0	0	0	25,000	0	0	0	0
Service/Utilities/Operating Exps.	0	16,200	100.0%	0	0	0	16,200	0	0	0	0
Total Non Labor Expenses	-	41,200	100.0%	-	-	-	41,200	-	-	-	-
Total Expenses	-	41,200	100.0%	-	-	-	41,200	-	-	-	-
Net Operating Result	-	(41,200)	100.0%	-	-	-	(41,200)	-	-	-	-

## Consolidated Summary

Although the information is similar on both the Planning Review tab and the Consolidated Summary tab, the key differences include:

- The Consolidated Summary tab includes prior two years of actual expenses.
- Both the Consolidated Summary tab and the Planning Review tab include the current year adopted budget, the budget request, and the variance.
- The Consolidated Summary tab allows you to drill down to the specifics of the broad category requests

by selecting the  icon.



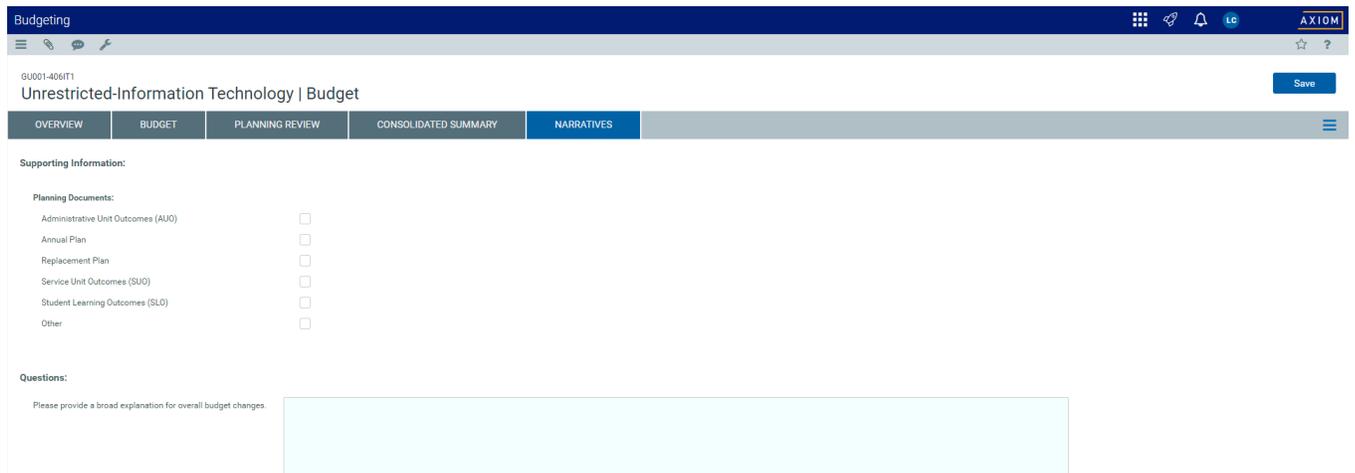
Account PLANNING	Actual 2020	Actual 2021	Actual Apr YTD 2022	Budget 2022	% Through Budget	Proposed Budget 2023	Total Approved Requests	Final Budget 2023	YoY Budget Variance %
<b>4313 - Non-Inst Supplies &amp; Materials</b>									
678000_C1 - Management Information Systems_Cerro Coso India	0	0	4,301	0	0.0%	25,000	0	25,000	0.0%
<b>4313 - Non-Inst Supplies &amp; Materials Total</b>	0	0	4,301	0	0.0%	25,000	0	25,000	0.0%
<b>4320 - Vehicle Supplies - Parts</b>									
678000_C1 - Management Information Systems_Cerro Coso India	0	0	0	0	0.0%	0	0	0	0.0%
<b>4320 - Vehicle Supplies - Parts Total</b>	0	0	0	0	0.0%	0	0	0	0.0%
<b>Total</b>	0	0	4,301	0	0.0%	25,000	0	25,000	0.0%

Budget requestors may use either the Planning Review tab or the Consolidated Summary tab to ensure that their budget request is complete.

## Narrative Tab

Requestors are encouraged to complete the narrative tab prior to submitting their budget request. The information in this tab pertains to the budget request for the planfile and is not FOAPAL specific.

Please refer to your college practices on documenting support for your budget request in your planning documents.



Supporting Information:

Planning Documents:

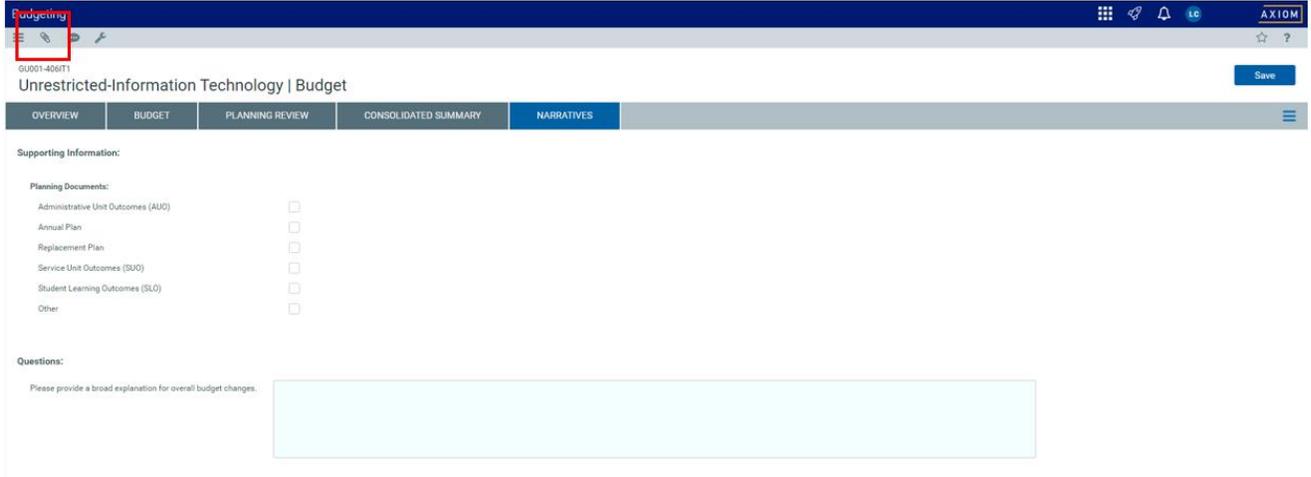
- Administrative Unit Outcomes (AUO)
- Annual Plan
- Replacement Plan
- Service Unit Outcomes (SUO)
- Student Learning Outcomes (SLO)
- Other

Questions:

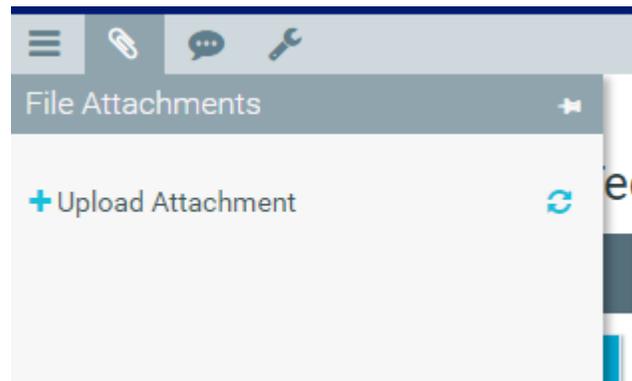
Please provide a broad explanation for overall budget changes.

## Attachments

If a requestor would like to include additional information that would be helpful in reviewing the budget request, an attachment can be added to the budget planfile. Attachments can be included while on any tab of the budgeting plan file.



Select the attachment icon from the top left and follow the prompts to add the attachment to the planfile.



After confirming that your budget request is completed, select the “SUBMIT” button from the top right.

Requestors can confirm that their request has moved to the next step in the workflow by revisiting the homepage and noting that the workflow for the specific planfile is now at step 2.

## Budget Augmentations

Each individual college/campus is utilizing the budget augmentation process differently. Please see below for the specifics.

### District Office

#### Bakersfield College

Requests for increasing overall budget should be submitted as a budget augmentation.

#### Cerro Coso Community College

Only requests that are related to a resource type – Maintenance, Information Technology, Marketing, and Professional Development – should be submitted as a budget augmentation.

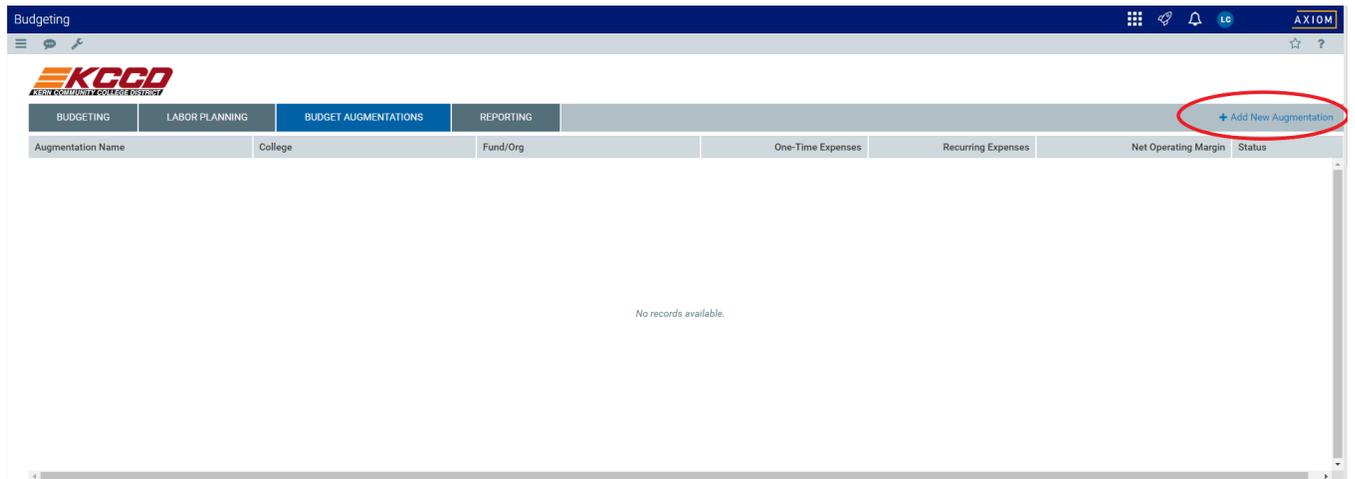
#### Porterville College

Only requests that are related to a resource type – Maintenance, Information Technology, Marketing, and Professional Development – should be submitted as a budget augmentation.

### Requesting an Augmentation

From the home page, select the Budget Augmentations tab.

To submit a new request, select the “+ Add New Augmentation” from the right side of the screen.



In the pop-up window, you will be prompted to enter basic information:

- Augmentation Name: Enter a brief name for the augmentation request. You will be given additional space to provide more information about your request on a later screen.
- Selecting Owing Fund\_Organization: From the drop down, begin entering the appropriate fund and organization code. The results will be filtered as you continue to type the fund and organization code. Select the appropriate combination of fund and organization code for this request.
- Select Planning: From the drop down for planning, begin entering the appropriate program code. The results will be filtered as you continue to type the program code. Select the appropriate combination of program code, activity code, and location code for this request.
- Resource Type: Select all that apply.
- Once all fields are completed, select .

You will now begin to enter the details of your request:

**Budgeting** | Testing | Budget Augmentation 2022

**GENERAL** | SCHEDULES | NARRATIVES

Augmentation Name: Testing

Augmentation ID: 62

Created By: Lisa Couch

Created Date: 7/20/2021

Owning Fund\_Organization: d0UR01\_d20I0C1

Planning: d010100\_\_\_\_\_

Approval Status: Pending

Augmentation Description: (250 character max.)

Enter Description

Resource Type(s):

- IT
- Maintenance
- Marketing
- Professional Development
- Research and Data

Augmentation Categories:

Increase Type: Not Selected

Strategic Objective: Not Selected

Planning Document: Not Selected

On the General Tab, you have been provided additional space to expand on the description of the augmentation request.

In addition, you are asked to make selections for three categories: Increase Type, Strategic Objective, and Planning Document. Drop down menus have been provided to assist.

**Budgeting** | Testing | Budget Augmentation 2022

**GENERAL** | **SCHEDULES** | NARRATIVES

Account	Planning	Proposed Budget 2022	Recurring?	Comments
<b>Revenues</b>				
+ Add Revenues Account				
<b>Total Revenues</b>		0		
<b>Non Labor Expenses</b>				
+ Add Direct Expenditures Account				
<b>Total Expenses</b>		0		
<b>Net Operating Result</b>		0		

On the Schedules Tab, you can select “+ Add Direct Expenditure Account” **IF** both the account code and the estimated cost is known. Since budget augmentation requests are often related to areas that are outside of a budget initiators scope, these elements can be completed by the individual responsible for the resource area. However, you will need to select “Apply” to add the account.

The screenshot shows the AXIOM Budgeting interface. At the top, there is a dark blue header with the word "Budgeting" on the left and several icons (grid, search, bell, user) on the right. Below the header, the page title is "Testing | Budget Augmentation 2022". A "Save" button is visible in the top right corner. The main content area has three tabs: "GENERAL", "SCHEDULES", and "NARRATIVES". The "NARRATIVES" tab is selected and highlighted in blue. Below the tabs, there are three text input fields. The first field is preceded by the text "Please provide a summary of this recommendation or request and attach related documentation." The second field is preceded by "Please describe the benefit of this request." The third field is preceded by "Please provide any additional information in support of your request that is not outlined elsewhere." A paperclip icon is visible in the top left corner of the main content area, indicating where to attach documentation.

On the Narratives tab, there are additional questions that relate to this specific request. Please do your best to answer these questions as it provides both the individual responsible for that resource area and others that will be reviewing the request with additional information.

If needed, you may also attach additional documentation using the paperclip icon in the top left corner.

Upon completion, SAVE and SUBMIT the request using the icons in the top right. You will have another opportunity to add a comment for the next reviewer prior to clicking the final SUBMIT request. Then, the Budget Augmentation Workflow screen will appear showing the request approval steps.

## Work Flow

There are unique workflow processes for the budget planfile, labor planfile and budget augmentations. Once the workflow step is completed (submitted), those individuals will only have read only access to those files.

### Labor PlanFile workflow



### Budget Planfile workflow



### Budget Augmentation workflow



Individuals can monitor movement through the workflow processes from the homepage by selecting either the Budgeting, Labor Planning, or Budget Augmentations tabs.

From the homepage, the  icon will provide additional information about the process for the budget planfile and budget augmentation request.

After opening the budget planfile, the  icon will provide information about the workflow at the account level.

## Timeline

Please refer to your college budget office for college-specific timelines.

## Resources

If you have any questions, please feel free to contact:

### District Office

Arlitha Harmon, Interim Chief Financial Officer

[Arlitha.williams@portervillecollege.edu](mailto:Arlitha.williams@portervillecollege.edu)

559-791-2374

### Bakersfield College

Mike Giacomini, Vice President of Finance & Administrative Services

[Mike.giacomini@bakersfieldcollege.edu](mailto:Mike.giacomini@bakersfieldcollege.edu)

661-395-4487

Somaly Boles, Budget Analyst

[Somaly.boles@bakersfieldcollege.edu](mailto:Somaly.boles@bakersfieldcollege.edu)

661-395-4715

Cristal Rios, Budget Analyst

[cristal.rios@bakersfieldcollege.edu](mailto:cristal.rios@bakersfieldcollege.edu)

661-395-4094

### Cerro Coso Community College

Lisa Couch, Vice President of Finance & Administrative Services

[lcouch@cerrocoso.edu](mailto:lcouch@cerrocoso.edu)

760-384-6288

### Porterville College

Arlitha Harmon, Vice President of Finance & Administrative Services

[Arlitha.williams@portervillecollege.edu](mailto:Arlitha.williams@portervillecollege.edu)

559-791-2374