
Axiom Budget Guide: Fiscal Year 2025 Budget Cycle

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I. FY 2025 BUDGET PROCESS BASICS

A. ACTION ITEMS

Welcome to the Axiom Budget Guide for the FY 2025 budget cycle. This guide is designed to provide you with the information necessary to effectively participate in the budget process. Following is an overview of the action items for the various departmental budget types.

Departments with Designated Operating Budget:

The term “designated operating” refers to operating budget on fund 830001. A zero-based budgeting approach is in place for operating requests involving this fund. This means that each department will begin with a base operating budget of zero for FY 2025 and a Keep the Lights On (KTLO) budget request form must be submitted to request budget for all necessary expenses on fund 830001.

Users may access Axiom planfiles to review prior fiscal year actuals, current fiscal year budget, and year-to-date actual expenses for the current fiscal year. See Section III. “DESIGNATED OPERATING PLANFILE REVIEW” for detailed instructions on how to review planfiles. This information will aid in budget account selection and in creating expense estimates. Transaction detail is available in [Cognos](#).

Departments with Fee Budget:

Fee managers will allocate expense budget the Axiom budget planfiles. If the allocation is not aligned with historical actuals, a justification should be provided for the change from trend. See Section V. “FEE & AUXILIARY PLANFILE ALLOCATIONS” for detailed instructions.

Departments with Auxiliary Budget:

Auxiliary managers will enter the FY 2025 revenue estimates and allocate expense budget in the Axiom budget planfiles. Attach additional detail of methodology, assumptions, and calculations used to create the FY 2025 Auxiliary Revenue estimate entered in the planfile. See Section V. “FEE & AUXILIARY PLANFILE ALLOCATIONS” for detailed instructions.

Personnel Requests:

Budget for existing salaried position numbers (full-time and part-time faculty/staff) will be included in the FY2025 base budget. Budget requests should not be submitted for existing positions. Funding requests related to new positions or reclassifications must be submitted using the Personnel Request Form posted on the budget office website. [Click here to access form](#). Please keep in mind that FY 2025 personnel requests that are made outside of the budget cycle are not likely to be approved, as they can significantly impact financial planning and resource allocation.

B. BUDGET REQUEST TYPES

Budget requests will require users to select one of the 5-year strategic trials. To review more information of the 5-year strategic trials click [here](#).

The types of budget request forms available in Axiom are as follows:

KTLO-Keep the Lights On

A KTLO budget request form is required for departments that have operating budget on fund 830001. Do not use this form for fee or auxiliary requests. KTLO requests should include the required department commitments and support mission critical operations.

SIF-Strategic Initiative Funding request: (Main Campus Only)

A SIF budget request form is required for FY 2025 strategic initiative funding. Presentations before the University Budget Advisory Council (UBAC) are required for SIF request ranking. Limit one strategic request per SIF form to allow for proper UBAC scoring of individual requests. Awarded amount is determined by funding availability.

SPF- Special Project Funding: (College of Law Only)

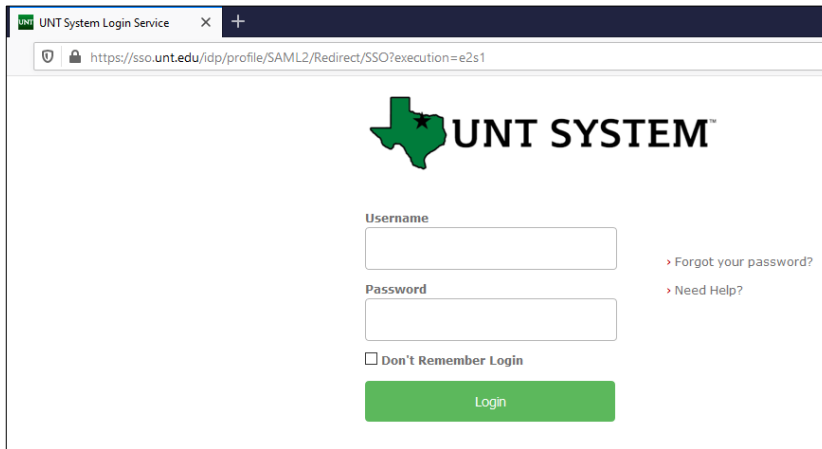
A SPF budget request form is required for College of Law FY 2025 special project funding. SPF request forms are designed to capture and evaluate funding requirements for special College of Law projects that fall outside of routine operational expenses.

HEF- Higher Education Fund:

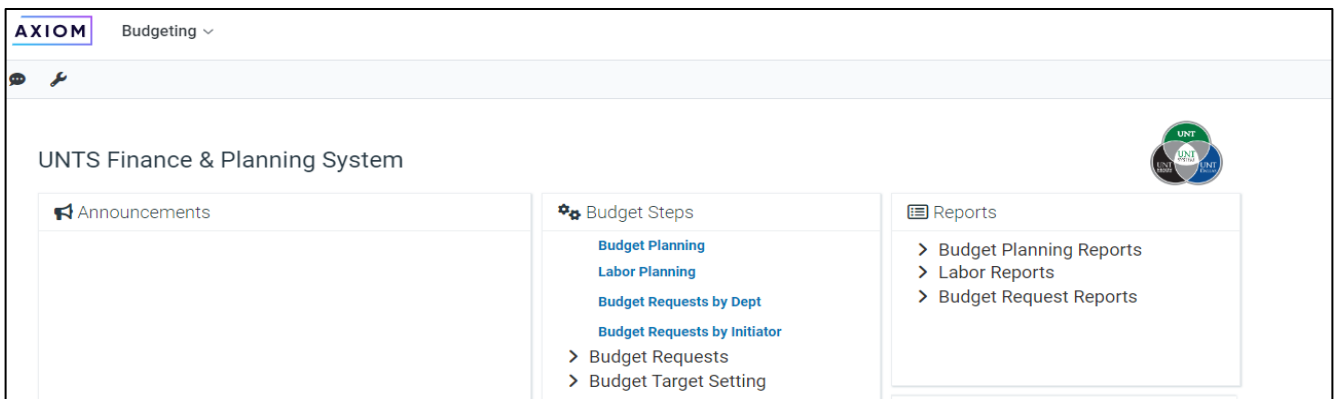
Higher Education Funds (HEF funds) are provided by the State of Texas for public universities to acquire land; construct, equip, repair or rehabilitate buildings or other permanent improvements; and acquire capital equipment, library books, and library materials, subject to various expenditure restrictions. A HEF budget request form must be submitted to receive HEF in FY 2025 for qualifying equipment or improvements with a unit cost of \$250 or greater. Click [here](#) to view HEF guidelines prior to submitting request.

II. ACCESS THE AXIOM HOME PAGE

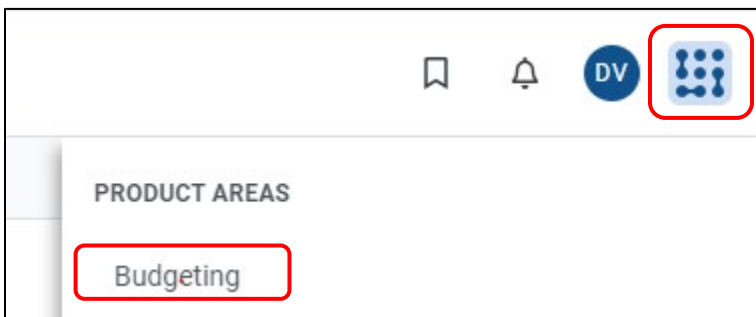
1. Go to the Axiom website: unt.axiom.cloud.
 - The preferred web browsers for Axiom are Internet Explorer or Microsoft Edge.
2. The UNTD single sign on screen will appear: Enter your UNTD credentials and click “Login.”



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).

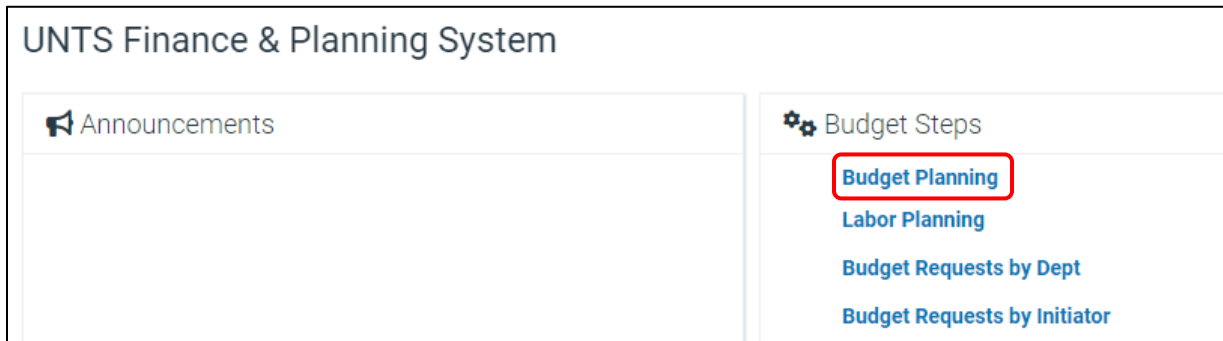


III. DESIGNATED OPERATING PLANFILE REVIEW

This section is for departments with designated operating budget. Fee and auxiliary managers should refer to section V. FEE & AUXILIARY PLANFILE ALLOCATIONS.

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

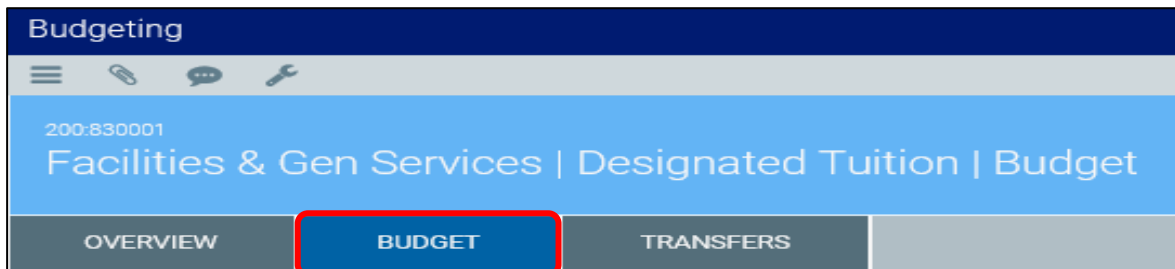
1. From the home screen, click on **Budget Planning**.



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.**

PLANFILE ↑	Description	BUD2025.BGT_Tot
533000_105_800001	Facilities & Gen Services GRD-General	0.00
533000_105_805001	Facilities & Gen Services State Approp-BSA	1080723.29
533000_200_830001	Facilities & Gen Services Designated Tuition	0.00

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.

200:830001 Facilities & Gen Services Designated Tuition Budget				
OVERVIEW	BUDGET	TRANSFERS		
Select Category All	Target \$-	Proposed Budget 2025 \$-	Variance \$-	
Account	Actual FY2023	Actual Month YTD FY2024		
> 533000-200-830001-550-----	Proposed Revenue: 0.00; Proposed Expense Budget: 0.00			
> 533000-200-830001-600-----	Proposed Revenue: 0.00; Proposed Expense Budget: 0.00			
> 533000-200-830001-600-----5100	Proposed Revenue: 0.00; Proposed Expense Budget: 0.00			
> 533000-200-830001-600-----12447-	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			

COLUMNS ON THE BUDGET TAB

Account	Actual FY2023	Actual Month YTD FY2024	Budget FY24	Proposed FY25
---------	------------------	----------------------------	----------------	------------------

- **Account:** Identifies the budgetary D-account.
- **Actual FY 2023:** Provides the actual revenues and expenses from FY 2023.
- **Actual Month YTD FY 2024:** Provides the current year-to-date actuals.
- **Budget FY 2024:** FY 2024 budget is equal to original budget plus permanent adjustments made during the year.
- **Proposed Budget FY 2025:** This column should be ignored when reviewing planfiles on fund 830001. Due to FY 2025 being a zero-based budget year, this column should not be used unless entering revenue or expense allocations for fee or auxiliary funds.
- **Variance:** This column should be ignored when reviewing planfiles on fund 830001. This column calculates the variance between the Proposed Budget FY 2025 and the FY 2024 budget.

200-830001
SERCH Institute | Designated Tuition | Budget

OVERVIEW BUDGET TRANSFERS

Select Category: All Target: \$- Proposed Budget 2025: \$- Variance: \$-

Account	Actual FY2023	Actual Month YTD FY2024	Budget FY24	Proposed FY25	Variance
Personnel Related					
D5012 - Salaries-Faculty/Acad-PartTime	5,500.00	-	-	-	-
D5031 - Wages	24,186.00	8,625.00	26,700.00	-	(26,700.00)
D5050 - Payroll Related Costs	2,467.05	244.42	-	-	-
Total Personnel Related	32,153.05	8,869.42	26,700.00	-	(26,700.00)
Non-Personnel Related					
D5101 - Professional Fees & Svcs	3,220.52	2,164.00	3,000.00	-	(3,000.00)
D5251 - Travel	1,170.85	-	-	-	-
D5301 - Materials & Supplies Exp	(222.18)	-	3,000.00	-	(3,000.00)
D5371 - Printing & Reproduction	4,612.20	5,093.48	-	-	-
D5501 - Other Operating Exp	3,750.00	11,460.00	19,877.00	-	(19,877.00)
+ Add New Non-Personnel Related Account					
Total Non-Personnel Related	36,717.39	27,342.48	25,877.00	-	(25,877.00)

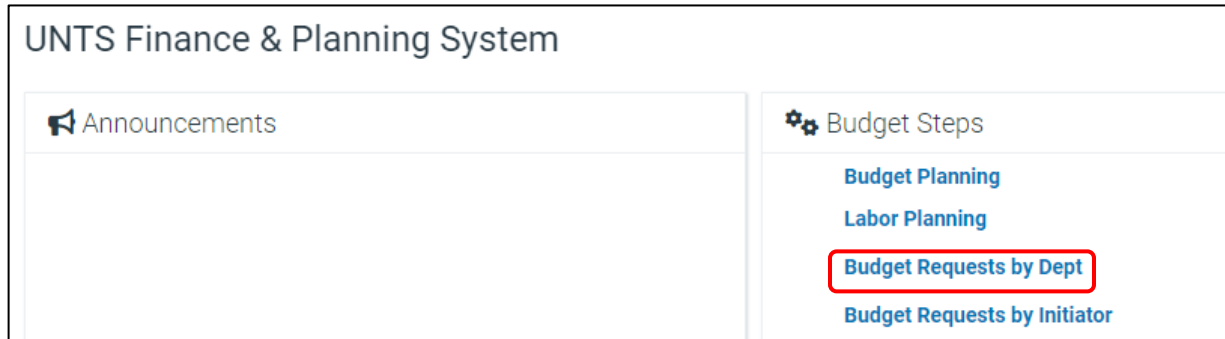
The D-accounts are categorized as Personnel and Non-Personnel. You may click on the magnifying glass next to the Personnel D-accounts to view the details. Only department approvers will have access to view the Personnel D-account details.

Personnel Related	
	D5012 - Salaries-Faculty/Acad-PartTime
	D5031 - Wages
	D5050 - Payroll Related Costs
Total Personnel Related	
Non-Personnel Related	
	D5101 - Professional Fees & Svcs
	D5251 - Travel
	D5301 - Materials & Supplies Exp
	D5371 - Printing & Reproduction
	D5501 - Other Operating Exp
	+ Add New Non-Personnel Related Account
Total Non-Personnel Related	

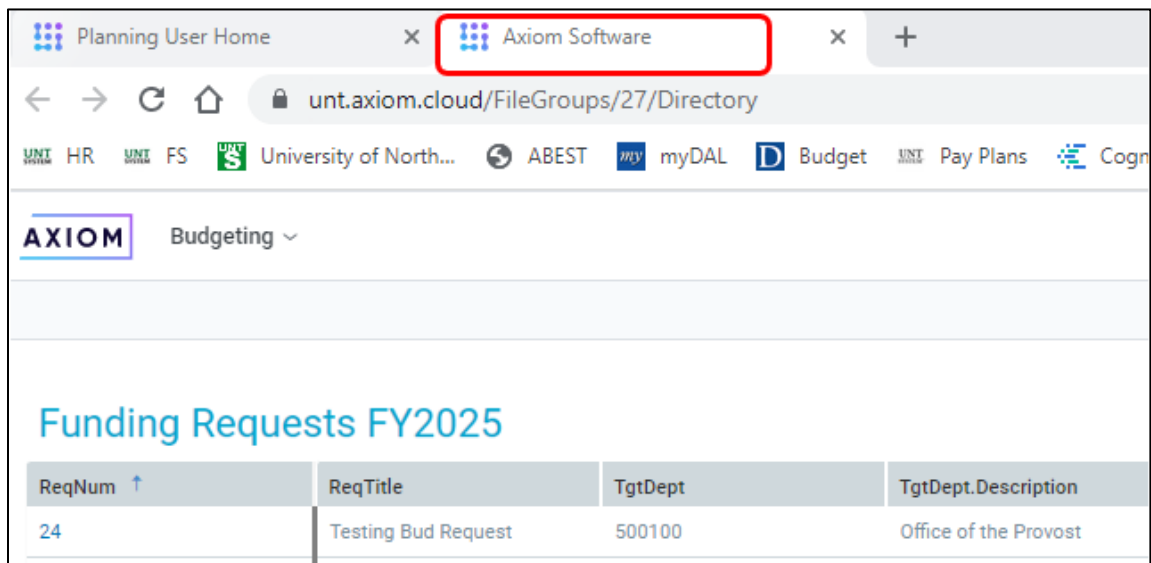
IV. BUDGET REQUEST FORMS

A. CREATE A BUDGET REQUEST FORM

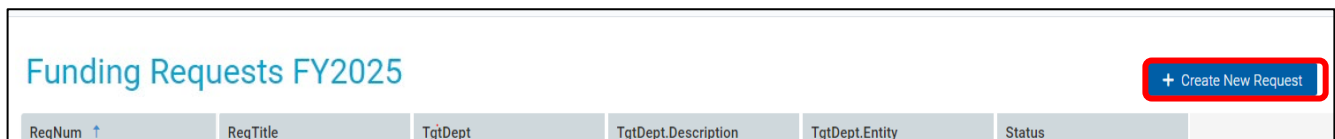
1. From the home screen, click on **Budget Request by Department**.



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**. 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, HEF, and SPF. 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**.

Request Form
Fiscal Year 2025

Request Title: (50 character max.)
Graduate School- KTLO

Select Owing Dept:
51 5000 - Graduate School

Request Type:
Keep the Light...

Expense Schedules: Position Operating

Create

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

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

GENERAL SCHEDULES CATEGORIES NARRATIVES Save to PDF

- The **General Tab** will require the user to select a **Strategic Plan Focus Area and Initiative**. The options consist of the **5-year strategic plan trails**. To find more information on the **5-year Strategic Plan**, [click here](#). On the **Strategic Plan Key Results** drop down, select N/A. Enter a detailed request description in **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**.

Request Title:	Example Department Operating
Strategic Plan Focus Area and Initiative:	c. Culture of Excellence
<i>Description of how this request supports the Strategic Plan Focus Area and Initiative is required on Narratives tab</i>	
Strategic Plan Key Results	N/A
Request Description:	Example department budget request description

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

GENERAL	SCHEDULES	CATEGORIES	NARRATIVES	Save to PDF
Expense				
Available Schedules: <input checked="" type="checkbox"/> Position <input checked="" type="checkbox"/> Operating				

- 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](#).

Available Schedules: <input type="checkbox"/> Position <input checked="" type="checkbox"/> Operating							
Summary Schedule							
		Expense					
	Year 1	Year 2	Year 3	Year 4	Year 5	5 Year	
One Time	Recurring	Total	Total	Total	Total	Grand Total	
18,000	-	-	-	-	-	18,000	
Operating Schedule							
Account	Recurrence	Year 1	Year 2	Year 3	Year 4	Year 5	Comment
D5031 Wages	One Time	14,000					2 student workers for front desk (\$10 rate * 19hrs * 28 weeks)
D5301 Materials & Supplies Exp	One Time	4,000					Materials for the student workers
+ Insert New Value							
Total Estimated Operating Cost		18,000					

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.

Available Schedules: <input checked="" type="checkbox"/> Position <input checked="" type="checkbox"/> Operating							
Summary Schedule							
Position FTE	Year 1		Year 2	Expense		Year 5	5 Year
	One Time	Recurring	Total	Year 3 Total	Year 4 Total	Total	Grand Total
1.00	21,000	187,500	250,000	-	-	-	458,500
Position Schedule							
Account	FTE	Year 1	Year 2	Year 3	Year 4	Year 5	5 Year Grand Total
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, or Innovation*), **level of urgency** (*Critical, Normal, or Low*), **impact on campus departments** (*One, Several, All, or None*), **impact with student population** (*One, Several, All, or No 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				
If this fund request does not get funded, what will be the impact toward the UNTD?		Response		
How does this funding request support the strategic focus for the upcoming fiscal year?				

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.

AXIOM Budgeting

Keep the Lights On (KTLO) | Example Department Operating

Requestor: Leigh-Ann Fashina (EUID: lbf0033)

Dept: 532000 - Office of Budget and Planning

GENERAL SCHEDULES CATEGORIES NARRATIVES

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.

AXIOM Budgeting

Message Stream

+ Add Comment

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.


The screenshot shows a pop-up window titled "Add Comment". It features a "Title" input field with the placeholder text "optional", a "Message" input field containing "@Bradford Love @Berenice Zuniga", and a "Tag user" dropdown menu. At the bottom, there are "Post" and "Cancel" buttons. Red boxes highlight the Title field, the Tag user dropdown, and the Post/Cancel buttons.

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.**

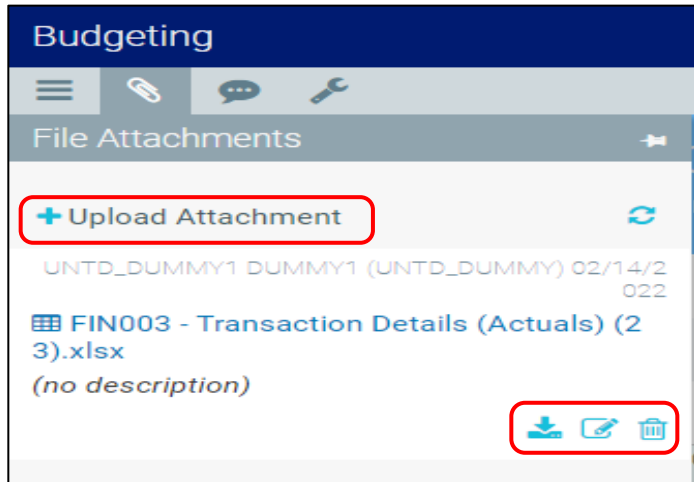
ADDING ATTACHMENTS

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.

The screenshot shows the Axiom Budgeting interface. The top bar displays "AXIOM Budgeting" with a dropdown arrow. Below the bar are three icons: a paperclip (highlighted with a red box), a speech bubble, and a wrench. The main content area has a blue header with the text "Keep the Lights On (KTLO) | Example Department Operating" and "Requestor: Leigh-Ann Fashina (EUID: lbf0033)". Below the header are four tabs: "GENERAL", "SCHEDULES", "CATEGORIES", and "NARRATIVES".

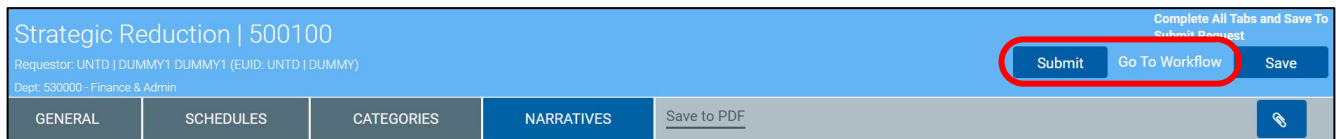
2. The sidebar will open to reveal the list of currently attached documents along with the feature to add new attachments. If you do not see an attachment and are expecting one to be there, select the  refresh icon. Refreshing may take several moments.

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.

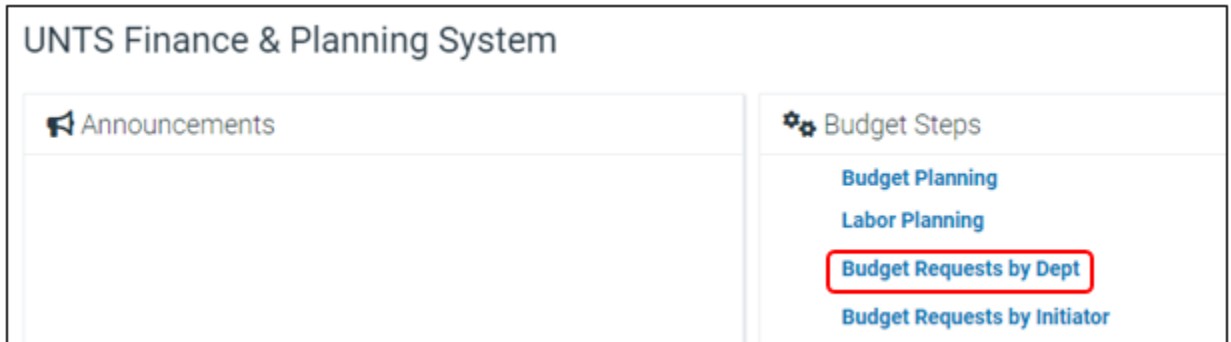


2. A pop-up box will populate to confirm the budget request submission. Click **Submit** again, the funding request will move to the approval workflow.

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. Make certain to include request number.
4. For budget users who are the funding department approver for the submitted request, please go to the Approve Budget Request Form section on page 18 for instructions.

D. CHECK REQUEST STATUS

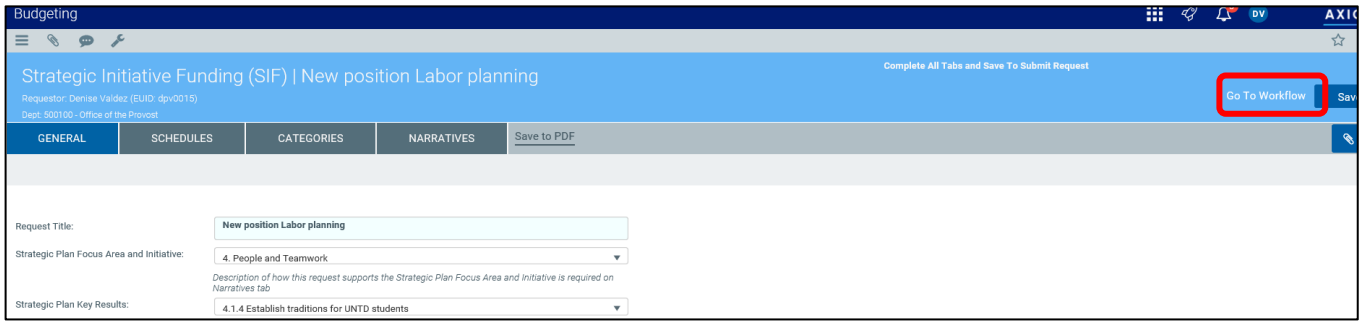
1. From the home screen, click on **Budget Request by Department**.



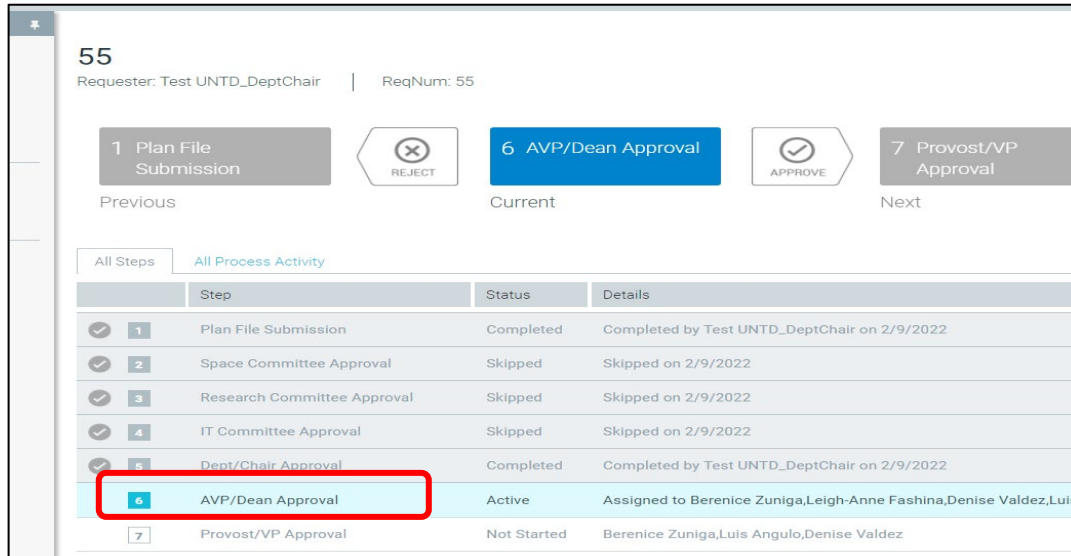
2. To view the approval workflow, click on the ReqNum hyperlink and the Budget Request Form module will open.

Funding Requests FY2025					
ReqNum ↑	ReqTitle	TgtDept	TgtDept.Description	TgtDept.Entity	Sta
2	CSEM- Notification	500700	Center Socioeconomic Mobility	DAL	
3	Grad school	515000	Graduate School	DAL	

3. Click “Go to Workflow” located on the right side of web page.



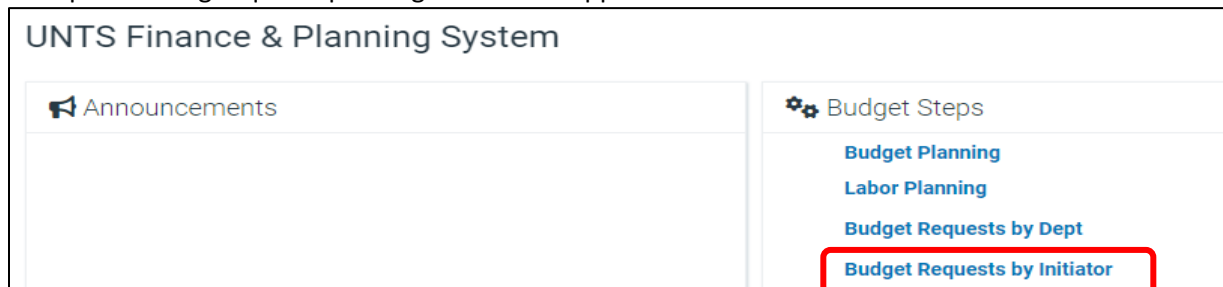
4. The workflow will show the approvers that are next in the workflow for the budget request form.



E. APPROVE BUDGET REQUEST FORM

HOW TO ACCESS PENDING REQUESTS

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



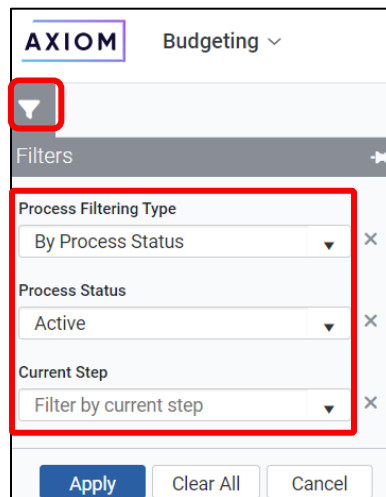
2. The Budget Request by Initiator module will open a list of funding requests associated with the user's department(s). On View drop-down bar, select All to review all requests that need approval.



Noteworthy 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 that budget request form.
- 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.
- 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 3/15/2024, then the Axiom due date is 3/17/2024.

Actions	ReqNum ↑	ReqTitle	Status	TgtDept	Process Initiator
	9	500100		500100	Denise Valdez

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.

Funding Requests FY2025		
View All		
Process Status: Active		
Actions	ReqNum ↑	ReqTitle
 	9	500100
 	10	Graduate School KTLO
 	11	Marketing SIF

HOW TO VIEW BUDGET REQUEST DETAIL AND SELECT ACTION

- 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



Budgeting

61

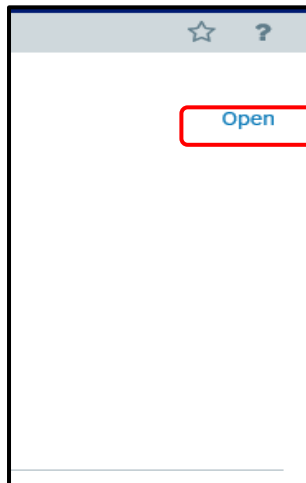
[Open Request](#)

Request No: 61
Request Title:
Request Type: Strategic Initiative Funding (SIF)
Request Year: 2023
Total Year 1 Amount: 214,500

School/Divison: C53000 - Finance & Admin
Department: 530000 - Finance & Admin
Requestor: UNTD_DUMMY1 DUMMY1 (EUID: UNTD_DUMMY)

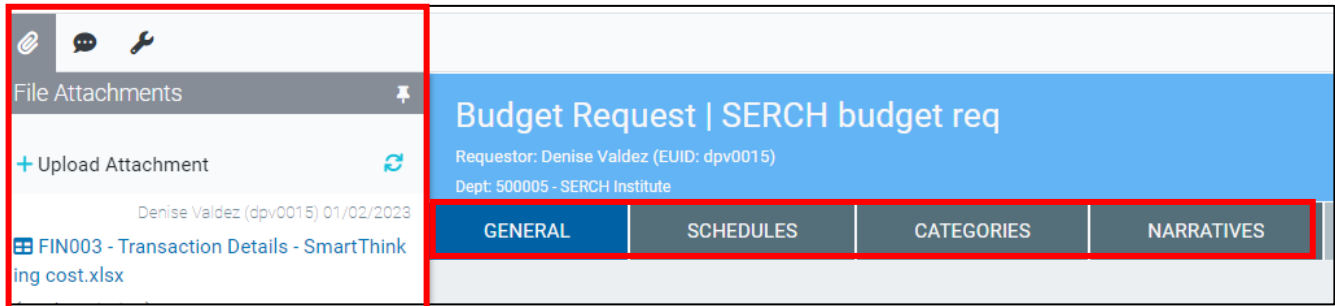
Request Description:
 NA

Right side of web page



[Open](#)

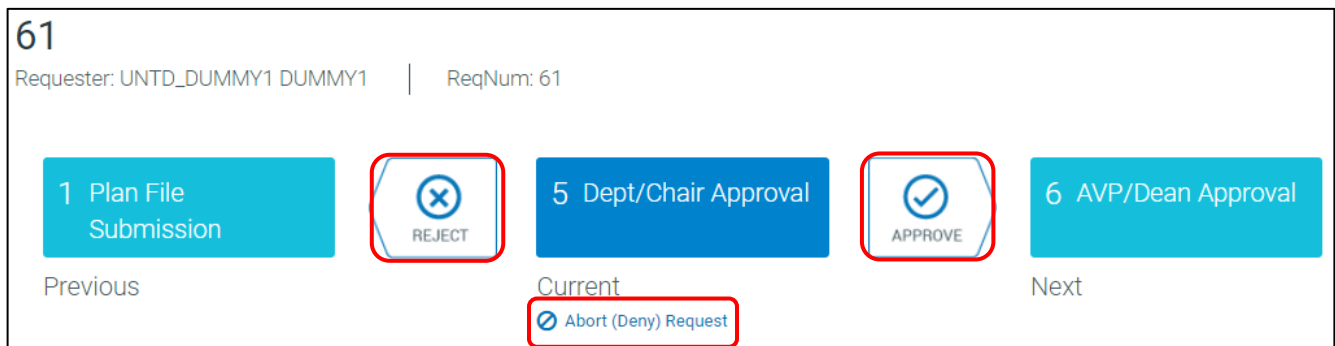
2. The approver should review the budget request form by clicking on each tab (General, Schedules, Categories, and Narratives) and view any attachments or comments. Click on the paperclip icon to view the attachments.



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

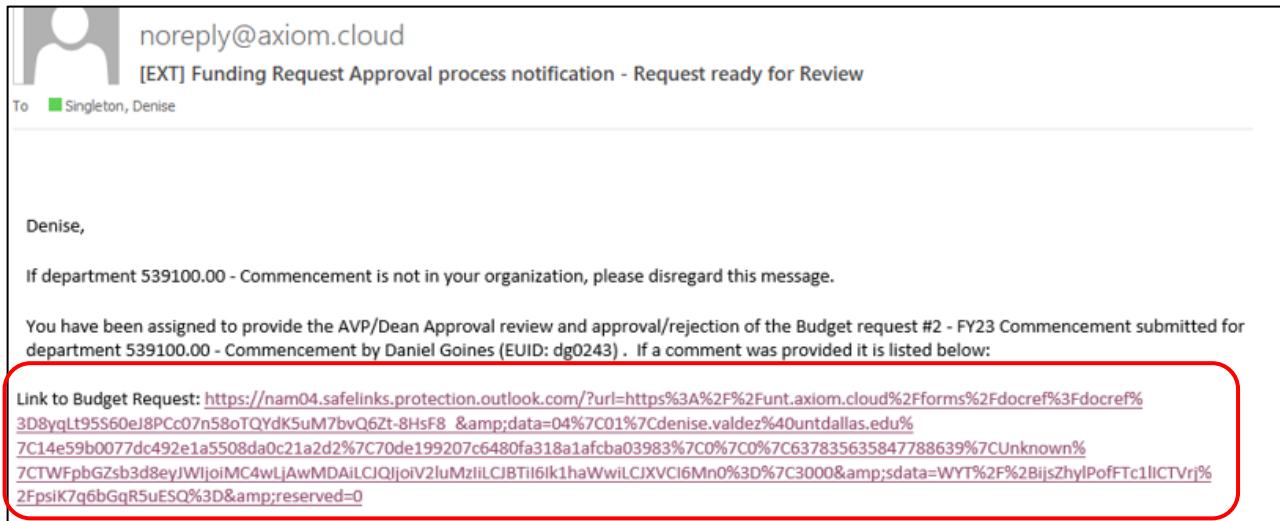


4. On the workflow page, approvers have the option to click either Approve, Reject, or Abort (Deny).
 - a. Approve: The request form will be approved and move to the next step.
 - b. Reject: The request form will be pushed back to the requester to make changes and re-submit the budget request form.
 - c. Abort (Deny): The request form will be denied and not allow the requester to re-submit the budget request form.



APPROVING FROM EMAIL NOTIFICATION 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.

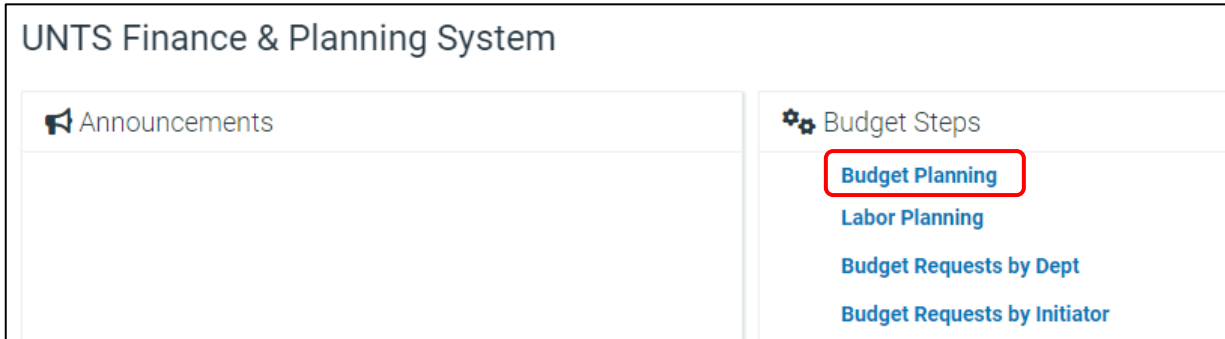


2. The detailed budget request will be displayed. Refer to steps 2 through 4 of the previous section “HOW TO VIEW BUDGET REQUEST DETAIL AND SELECT ACTION” to proceed with review and selecting an action.

V. FEE & AUXILIARY PLANFILE ALLOCATIONS

Fee and auxiliary department budget managers will enter revenue estimates (if applicable) and allocate expense budget to the appropriate budgetary accounts in budget planfiles. This section describes how to navigate the planfiles to make these entries.

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

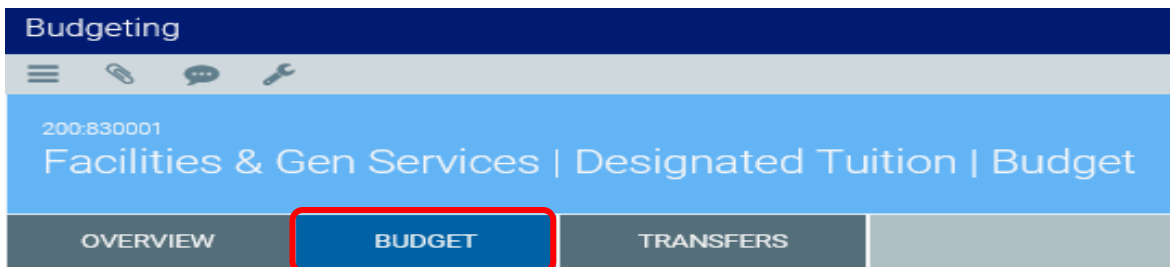



2. A new internet browser tab will appear. Budgets in Axiom are grouped by Dept_FundCat_Fund. This combination of chart fields is referred to as a **planfile**. To filter a specific department or planfile: go to the search bar and enter any part of the planfile number, the department ID or description,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

The screenshot shows the 'Budgeting 2025' search results page. A search bar is visible at the top right. Below it is a table with the following columns: PLANFILE ↑, Description, Dept.Entity, Entity.BusUnitCode, and BUD2025.BGT_Tot. The first three rows of the table are highlighted with a red box.

PLANFILE ↑	Description	Dept.Entity	Entity.BusUnitCode	BUD2025.BGT_Tot
500000_105_800001	Office of the President GRD-General	DAL	DL773	472077.00
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

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.



- 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.

200-880029 Distance Learning Student Distance Education FFF Budget				
OVERVIEW	BUDGET	TRANSFERS		
Select Category All	Revenue \$215,636.00	Proposed Budget 2024 \$131,250.00	Variance \$84,386.00	
Account	Actual FY2023	Actual Month YTD FY2024	Budget FY24	Proposed FY25
> 513200-200-880029-400-----			Proposed Revenue: 215,636.00; Proposed Expense Budget: 131,250.00	
> 513200-200-880029-630-----20005-			Proposed Revenue: 0.00; Proposed Expense Budget: 0.00	
> 513200-200-880029-630-----20008-			Proposed Revenue: 0.00; Proposed Expense Budget: 0.00	
> 513200-200-880029-630-----20009-			Proposed Revenue: 0.00; Proposed Expense Budget: 0.00	
> 513200-200-880029-630-----20017-			Proposed Revenue: 0.00; Proposed Expense Budget: 0.00	
> 513200-200-880029-630-----20025-			Proposed Revenue: 0.00; Proposed Expense Budget: 0.00	

A. BUDGET PLANFILE BASICS

COLUMNS ON THE BUDGET TAB

Account	Actual FY2023	Actual Month YTD FY2024	Budget FY24	Proposed FY25
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- **Account:** Identifies the budgetary D-account.
- **Actual FY 2023:** Provides the actual revenues and expenses from FY 2023.
- **Actual Month YTD FY 2024:** Provides the current YTD actuals.
- **Budget FY 2024:** FY 2024 budget is equal to original budget plus permanent adjustments made during the year.
- **Proposed Budget FY 2025:** This field is where the expense allocations will be entered for FY 2025 budget.
- **Variance:** This column calculates the variance between the Proposed Budget FY 2025 and the FY 2024 budget.




SECTIONS OF THE BUDGET TAB

The budget tab has two main sections: Revenue and Expense.

- Revenue Section:** All revenue estimates will be entered in this section. Revenues are budgeted at the GL account level. All account numbers have 5 digits. External revenue accounts begin with a 4 and internal revenue accounts begin with a 6.

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

- Expense Section:** Expense D-accounts are divided into two sections: Personnel Related and a Non-Personnel Related. Budget users may enter Non-Personnel Related expense budget allocations in the open fields. To view Personnel Related account details, click on the magnifying glass symbol. Fields in the Personnel Related section may only be edited by the budget office. Any changes needed may be sent to budget.office@untDallas.edu.

Personnel Related				
 D5012 - Salaries-Faculty/Acad-PartTime	5,500.00	-	-	-
 D5031 - Wages	24,186.00	8,625.00	26,700.00	-
 D5050 - Payroll Related Costs	2,467.05	244.42	-	-
Total Personnel Related	32,153.05	8,869.42	26,700.00	-
Non-Personnel Related				
D5101 - Professional Fees & Svcs	3,220.52	2,164.00	3,000.00	-
D5251 - Travel	1,170.85	-		-
D5301 - Materials & Supplies Exp	(222.18)	-	3,000.00	-
D5371 - Printing & Reproduction	4,612.20	5,093.48		-
D5501 - Other Operating Exp	3,750.00	11,460.00	19,877.00	-
+ Add New Non-Personnel Related Account				
Total Non-Personnel Related	12,531.39	18,717.48	25,877.00	-

B. FEE MANAGER PLANFILE ALLOCATIONS

- Select the budget planfile to review the Fee revenue estimate and to allocate expenses.

Budgeting 2025				
PLANFILE ↑	Description	Dept.Entity	Entity.BusUnitCode	BUD2025.BGT_Tot
515100_200_880018	Graduate Admissions Graduate Admissions App FFF	DAL	DL773	40865.00

- The FY 2025 Fee estimate will be shown in the Revenue section field under the Proposed Budget FY 2025. **DO NOT EDIT REVENUE AMOUNT.**

OVERVIEW	BUDGET	TRANSFERS			
Select Category All	Revenue \$20,100.00	Proposed Budget 2024 \$-	Variance \$20,100.00		
Account	Actual FY2023	Actual Month YTD FY2024	Budget FY24	Proposed FY25	
515100-200-880018-500-----					
Revenue					
40713 - Application Fee	Input Total	24,350.00	5,050.00	20,433.00	20,100.00
+ Add New Revenue Account					
Total Revenue		24,350.00	5,050.00	20,433.00	20,100.00

- Fee managers will allocate expense budget to the appropriate D-accounts in the open fields under the Non-Personnel Related section in the Proposed FY25 column. Click on “+Add New Non-Personnel Related Account” if the needed D-account is not showing.

Fields in the Personnel Related section may only be edited by the budget office. Edit requests sent to budget.office@untdallas.edu will be made upon request. 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. To view labor details, click on the magnifying glass symbol next to the labor account.

D-account selection notes: 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](#).

Account	Actual FY2023	Actual Month YTD FY2024	Budget FY24	Proposed FY25
Non-Personnel Related				
D5101 - Professional Fees & Svcs	46,799.21	59,974.29	10,500.00	200.00
D5251 - Travel	436.31	-	8,550.00	-
D5301 - Materials & Supplies Exp	255,989.02	90,747.31	104,000.00	-
D5331 - Communication & Utilities	104,236.07	299,481.44	595,000.00	-
D5350 - Repairs and Maintenance	935,937.22	162,898.22	593,000.00	-
D5360 - Rental Exp-Non-Cap	50,747.20	30,502.79	-	-
D5365 - Oper Lease Exp-Non-Cap	26,188.12	1,775.53	5,664.00	-
D5371 - Printing & Reproduction	6,993.26	1,054.13	6,000.00	-
D5501 - Other Operating Exp	24,535.36	10,192.91	17,450.00	-
D5701 - Capital Expense	5,591.24	-	-	-
+ Add New Non-Personnel Related Account				

- Once the allocations are entered, click **Save**. The Variance (Revenue – Proposed Budget FY 2025) must be \$0 in order to click the Save button (located in the top right corner of the webpage).

C. AUXILIARY MANAGER PLANFILE ALLOCATIONS

1. Select the budget planfile to enter the Auxiliary revenue estimate and to allocate expense budget.

Budgeting 2025				
PLANFILE +	Description	Dept.Entity	Entity.BusUnitCode	BUD2025.BGT_Tot
522001_120_810022	Housing & Residence Life Auxiliary-Housing App Fee	DAL	DL773	44800.00
522001_120_810023	Housing & Residence Life Auxiliary-Housing Ck Out Fee	DAL	DL773	0.00

2. Auxiliary managers will enter the FY 2025 revenue estimate in the revenue section under the Proposed Budget FY 2025.

OVERVIEW	BUDGET	TRANSFERS			
Select Category All	Revenue \$-	Proposed Budget 2024 \$-	Variance \$-		
Account	Actual FY2023	Actual Month YTD FY2024	Budget FY24	Proposed FY25	
522001-120-810022-700-----					
Revenue					
40713 - Application Fee	Input Total	15,300.00	-	22,400.00	-
+ Add New Revenue Account					
Total Revenue		15,300.00	-	22,400.00	-

3. Auxiliary Managers are **required** to attach additional detail of methodology, assumptions, and calculations used to create the FY 2025 Auxiliary Revenue estimate entered in the planfile. Attachments may be uploaded by clicking on the **paperclip icon** (located in the top left) and then clicking on **+Upload Attachment**.

File Attachments

Auxiliary-Housing App Fee | Budget

+ Upload Attachment

TRANSFERS					
	Proposed Budget 2024	Variance			
	\$-	\$-			
Budget Method	Actual FY2022	Actual Month YTD FY2023	Budget FY2023	Proposed Budget FY2024	
Input Total	15,300.00	-	22,400.00	-	-

- Auxiliary managers will allocate expense budget to D-accounts in the open fields under the Non-Personnel Related section in the Proposed FY25 column. Click on “+Add New Non-Personnel Related Account” if the needed D-account is not showing.

Fields in the Personnel Related section may only be edited by the budget office. Edit requests sent to budget.office@untdallas.edu will be made upon request. 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. To view labor details, click on the magnifying glass symbol next to the labor account.

D-account selection notes: 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](#).

Account	Actual FY2023	Actual Month YTD FY2024	Budget FY24	Proposed FY25
Non-Personnel Related				
D5101 - Professional Fees & Svcs	46,799.21	59,974.29	10,500.00	200.00
D5251 - Travel	436.31	-	8,550.00	-
D5301 - Materials & Supplies Exp	255,989.02	90,747.31	104,000.00	-
D5331 - Communication & Utilities	104,236.07	299,481.44	595,000.00	-
D5350 - Repairs and Maintenance	935,937.22	162,898.22	593,000.00	-
D5360 - Rental Exp-Non-Cap	50,747.20	30,502.79	-	-
D5365 - Oper Lease Exp-Non-Cap	26,188.12	1,775.53	5,664.00	-
D5371 - Printing & Reproduction	6,993.26	1,054.13	6,000.00	-
D5501 - Other Operating Exp	24,535.36	10,192.91	17,450.00	-
D5701 - Capital Expense	5,591.24	-	-	-
+ Add New Non-Personnel Related Account				

- Once the allocations are entered, click **Save**. The Variance (Revenue – Proposed Budget FY 2025) must be \$0 in order to click the Save button (located in the top right corner of the webpage).

Office of Events Auxiliary- Events Budget							Save
OVERVIEW	BUDGET	TRANSFERS					
Select Category	Revenue	Proposed Budget 2024	Variance				
All	\$80,700.00	\$80,700.00	\$-				
Account	Budget Method	Actual FY2023	Actual Month YTD FY2024	Budget FY24	Proposed FY25		
530001-120-810006-700-----							
Revenue							
42103 - Rentals-Space-Non-Lease	Input Total	(6,073.28)	4,427.00	85,000.00	80,700.00		
60035 - I/C Event Security-Inc	Input Total	7,190.00	-	-	-		
60213 - I/C Allocation Offset	Input Total	-	-	-	-		
+ Add New Revenue Account							
Total Revenue		1,116.72	4,427.00	85,000.00	80,700.00		
M&O							
D5014 - Salaries -Staff	From Labor	-	25,600.00	61,440.00	61,440.00		
D5031 - Wages	From Labor	16,352.56	3,560.00	-	-		
D5040 - Supplemental Pay	From Labor	-	300.00	480.00	720.00		
D5050 - Payroll Related Costs	From Labor	2,518.31	7,713.49	-	15,540.00		
D5101 - Professional Fees & Svcs	Input Total	1,770.00	20,757.81	-	1,000.00		
D5301 - Materials & Supplies Exp	Input Total	80.93	-	-	2,000.00		