Training Guide for:
Position or Employee Planning Budget Report

Who should use this guide:
Departmental and/or College financial planners managing funding for personal services.

Purpose:
The report allows users to view a breakdown of the employees’ funding (including shared funding) as planned in the Labor Module for next fiscal year. Users are able to search a single or multiple incumbents by name, employee number, position number, or position title/name.

Locating the report:
Arizona.axiom.cloud
Navigating the report:

Use the filter icon to retrieve information by position or employee.

- Select Year - Select current planning year. Data from the previous planning cycle is also available for reference.
- Select Position - Click on the dropdown arrow to search incumbents by typing or selecting the position number or the position name/title.
- Select Employee - Click on the dropdown arrow to search incumbents by typing or selecting the employee’s name or employee ID.

Note - you must clear previous selections before making new ones.

Your selections will be displayed at the top of the report. The report also offers the ‘Print to PDF’ and ‘Export to Excel’ functions, located on the top-right corner:
Understanding your data:

Each row will display the Home Department, Position Number, Position Name, Current Incumbent, Funding Org, Planning Fund, Budget Object, Distribution/Allocation percentages, and the total salary and benefits for each employee as planned in the Labor Module for next fiscal year.

The totals displayed in the report will match the totals in the “Position Planning” tab and the “Position Detail” popup tool in the Labor module.
Use the Position Detail tool in the Labor Planning Module if changes are needed.

For additional questions, please contact your assigned Budget Analyst.