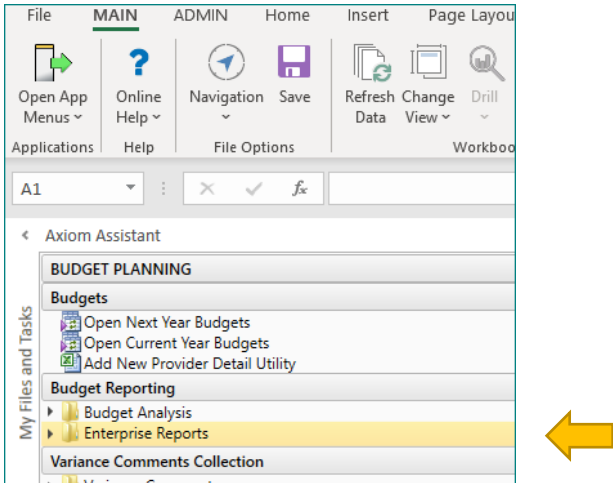


Actual/Budget 2023 – Reporting Guidelines

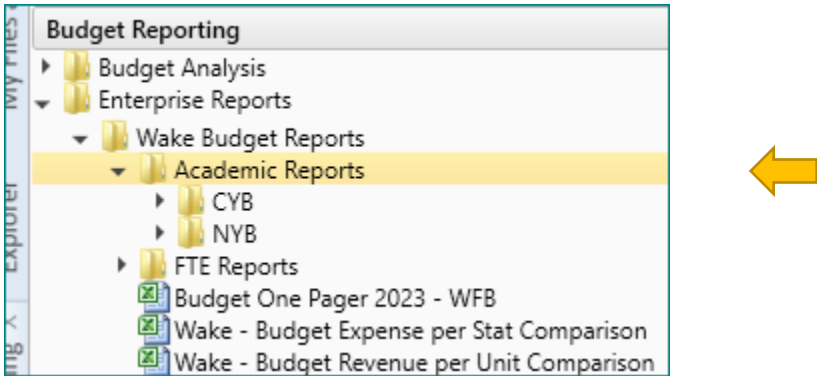
Access Academic Reports:

Under splash page when logging into Axiom:

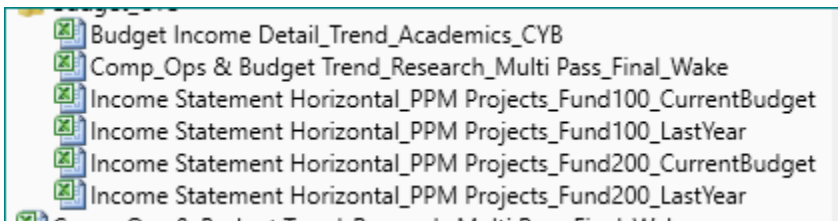
1/ Open App Menus and choose Budgeting/Enterprise Reports:



2/ Enterprise Reports/Wake Budget Reports/Academic Reports



3/Reports to be found under CYB:



Common Filters:

First two reports:

Filter: DEPT.DEPT = 55811085045501 AND ACCT.Fund = 100 (cost center with restricted or unrestricted balances)

DEPT.DEPT = 55811085045501 AND ACCT.Payor_Code = 52457 (program level)

DEPT.DEPT = 99840000888883 (project level)

DEPT.DEPT IN (99840000888881, 99840000888882, 99840000888883, 99840000888886) (multiple projects)

Last four reports (PPM Reports):

Filter: Dept.Specialty = 55811085045609 (Result - list of all your projects under the cost center)

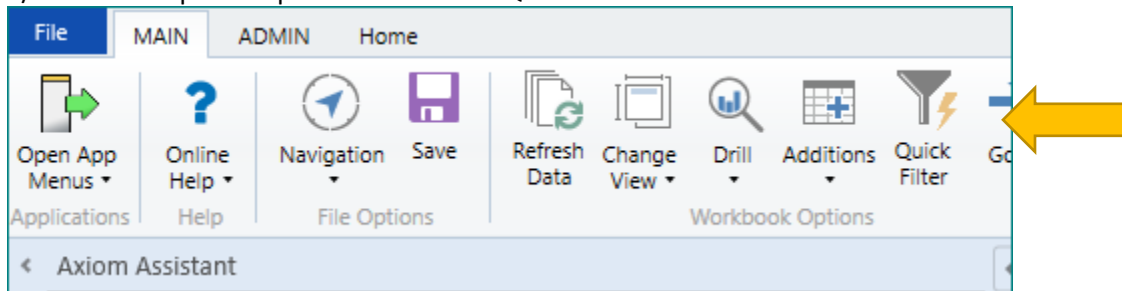
DEPT.DEPT IN (99840000888881, 99840000888882, 99840000888883, 99840000888886)

Note: Prefix 998 is in front of all projects which are numeric

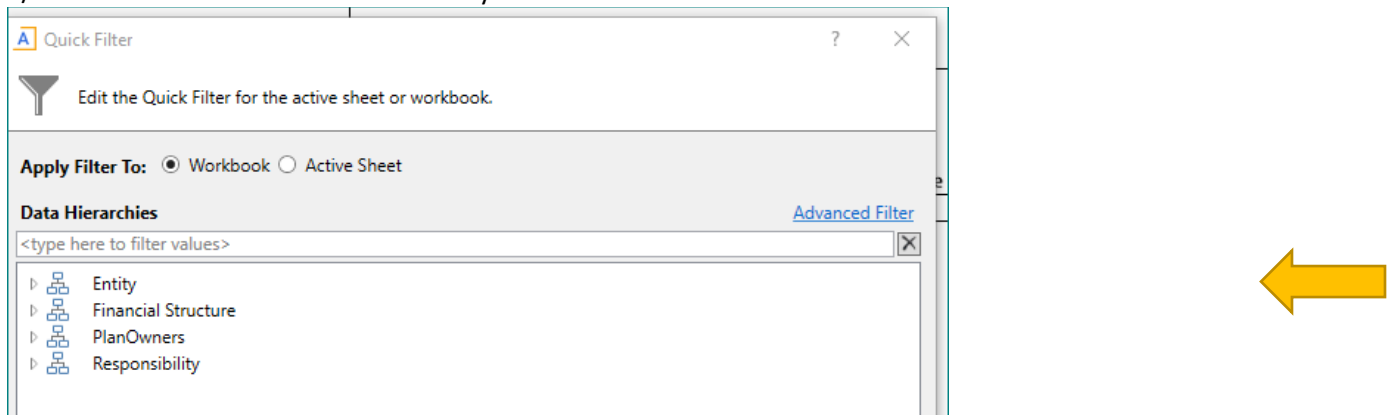
Prefix 991 is in front of the projects that have a Z. For example: 10000Z62610 = 99110000962610

Running Reports:

1/ Once the report is opened click on the Quick Filter:

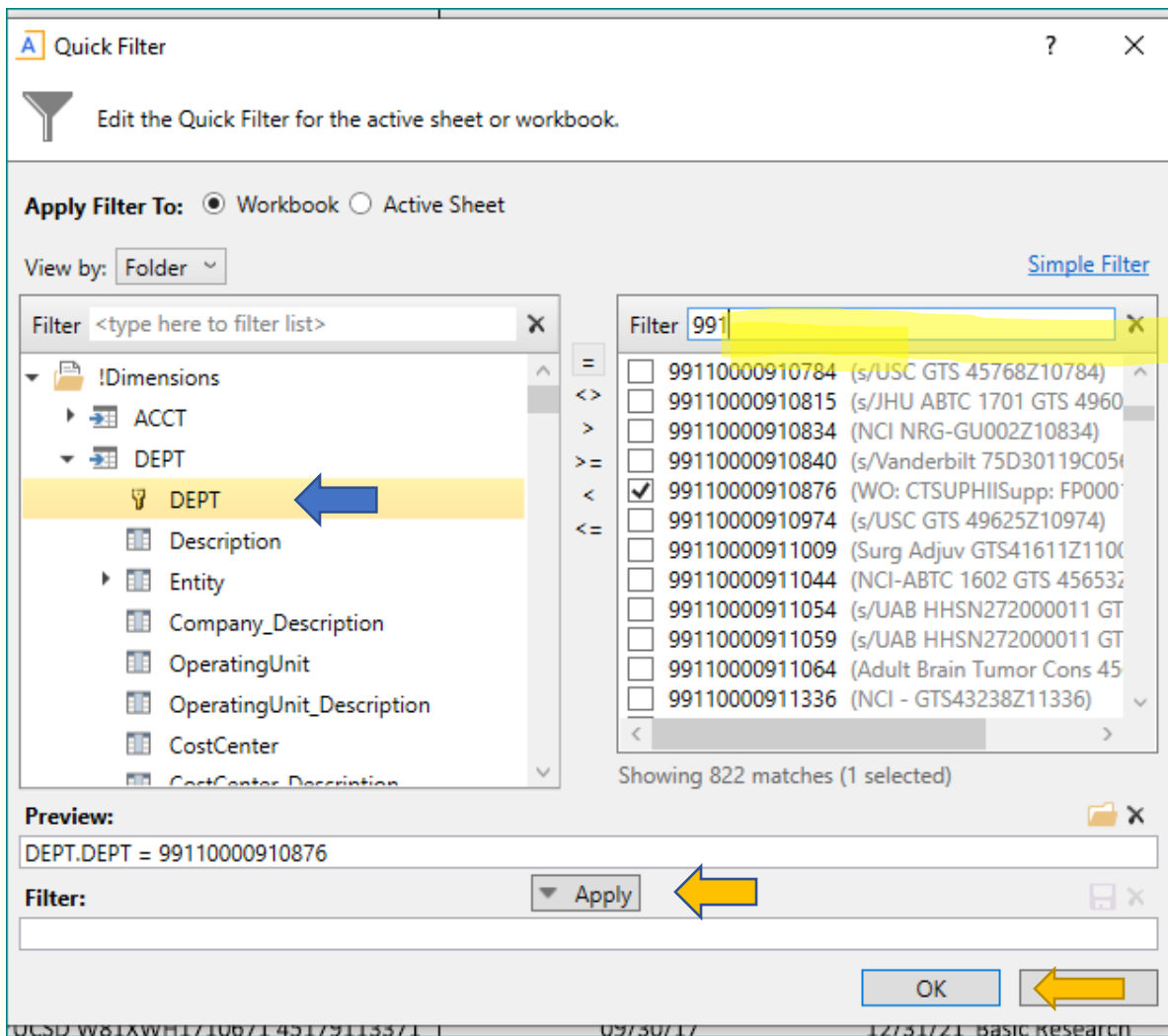


2/ Click on Advanced Filter – Should only have to do this once.

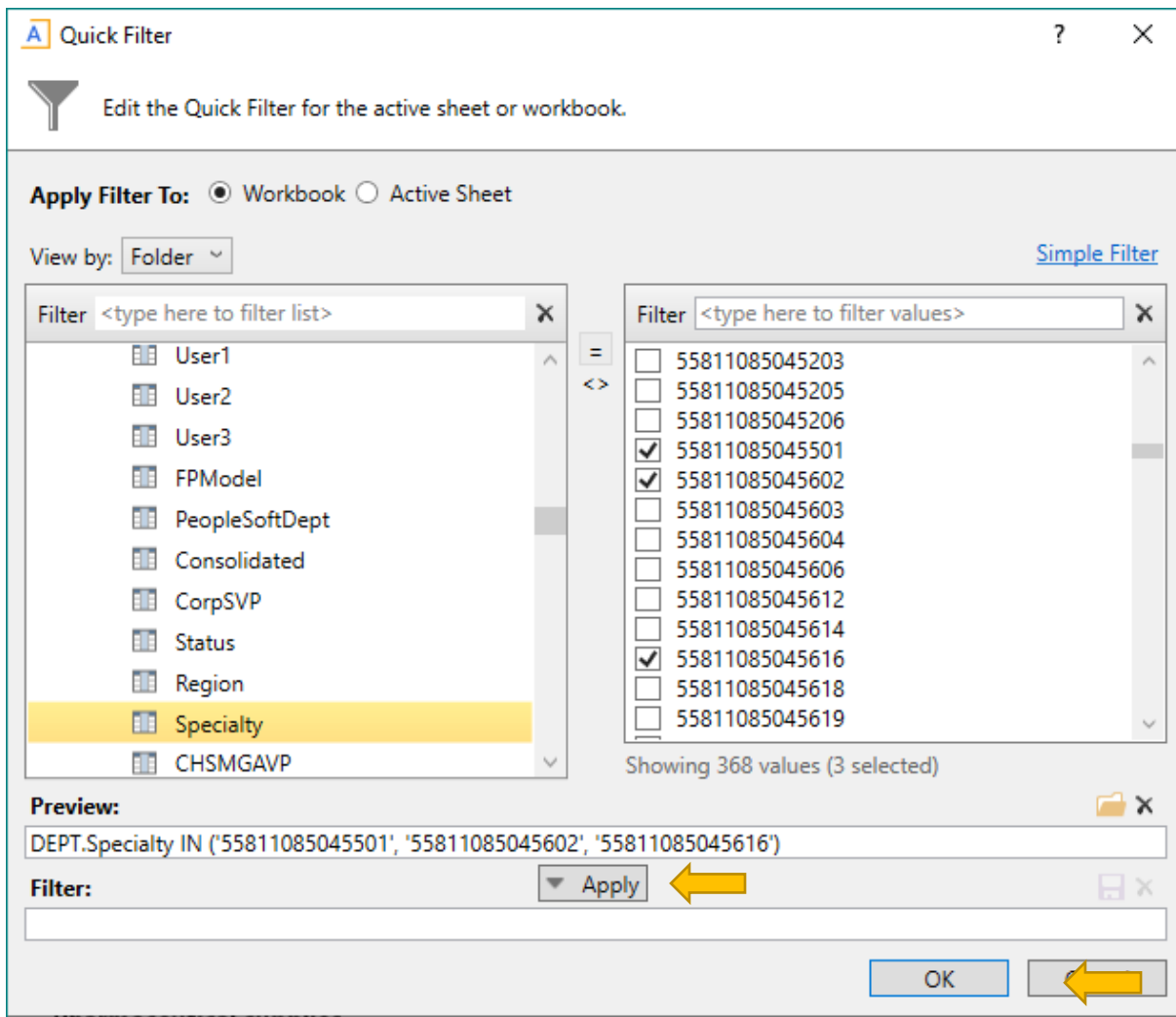


3/ Use the filter to gather the information you want to review. Example below “Dept.Dept = Project” Once checked off, click apply and okay.

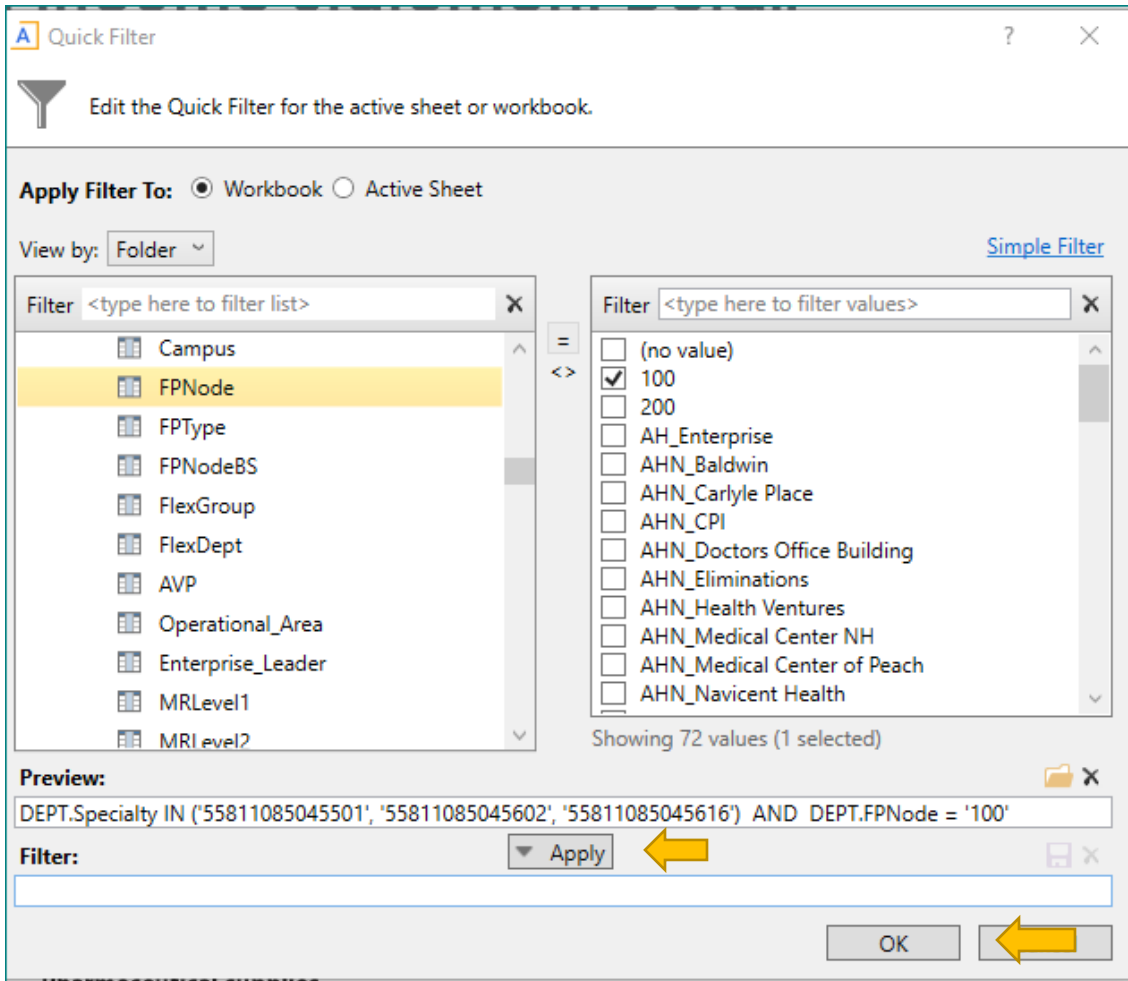
You can check off multiple projects.



Other filters to add:
Home Cost Center of all projects use DEPT.Specialty, click apply and ok.

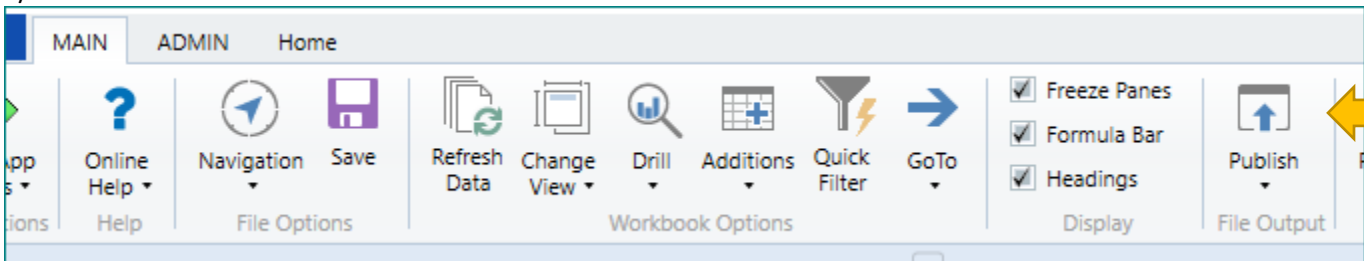


Add a fund type, temp restricted or unrestricted, filter Dept.FPNode, click apply and ok



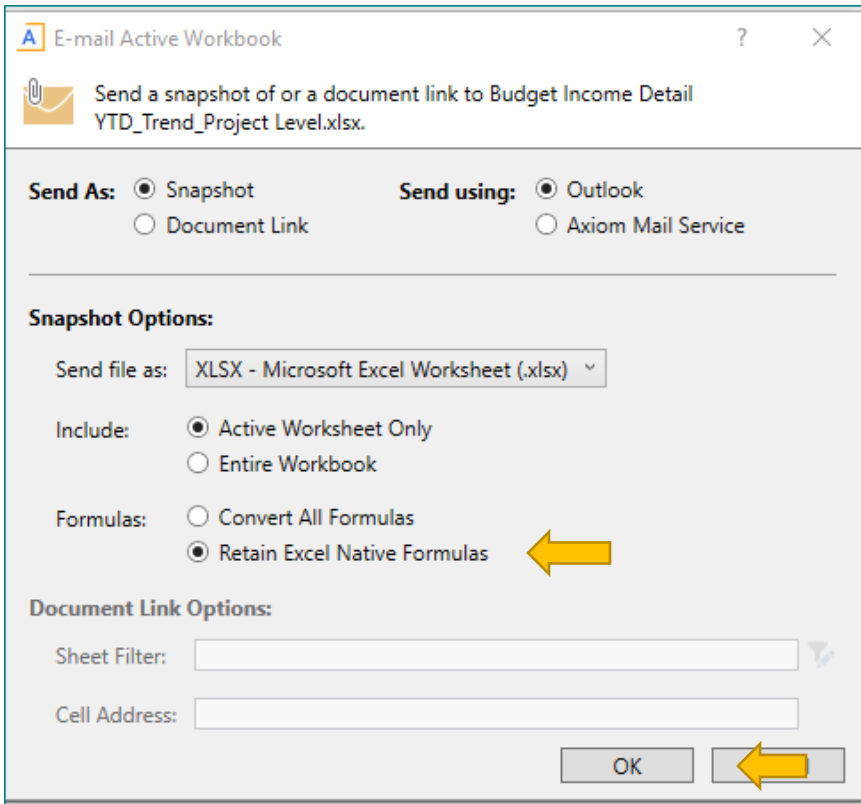
Saving report:

1/ Click on Publish



2/ Click on E-mail Workbook

3/ Choose Retain Excel Native Formulas / Click OK



The file will show up in your Outlook, as if you need to send it out. Open file and save to your drive.

