

YBT Process Management – Institutional Plan (IP)

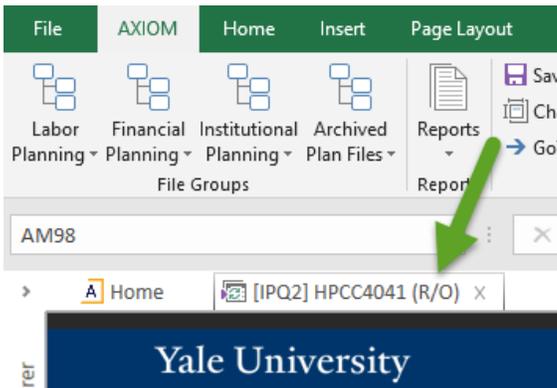
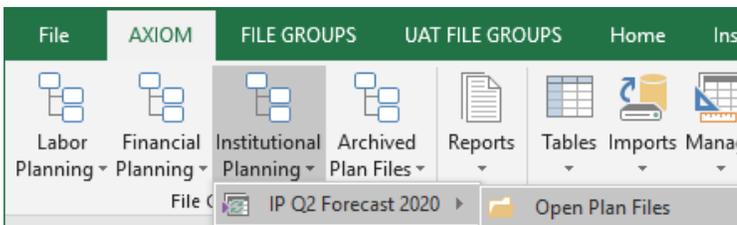
The Process

The Institutional Plan (IP) displays consolidated data for a given cycle (Q2 Forecast, Budget or Year End), alongside comparison data which allows the unit to explain variances and detail Transfer information. Once the data is balanced and all variance explanations and transfer reconciliations are complete, the user will use Process Management to notify the Budget Office Analysts that the IP is ready for their review.

Accessing the Institutional Plan (IP) files

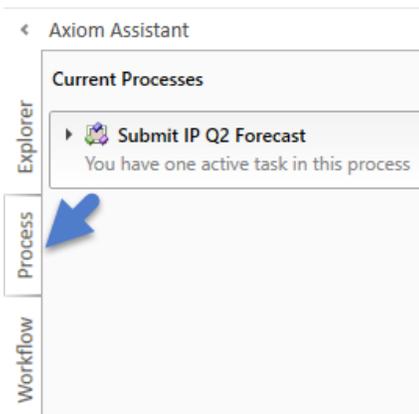
Access on the Axiom Toolbar

At all times, the IP can be accessed from the dropdown on the Axiom toolbar.

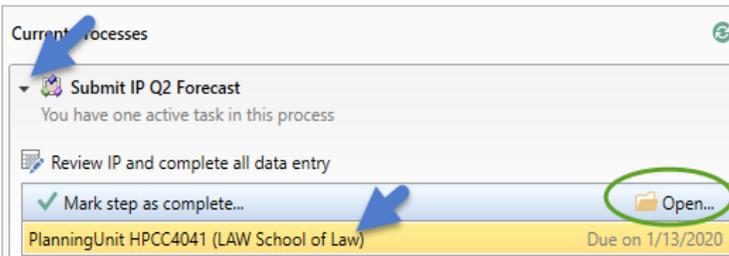


Depending on where the file is in Process Management, it will be available on the Axiom toolbar either Read/Write or Read-only. When you open the IP if the tab name has (R/O) then the file is Read-only and any data entered will not be able to be saved.

Access in the Axiom Assistant



If you have a Process Role, you will see the 'Process' tab in the Axiom Assistant (top left corner of the screen). When you have an active task, you will see the 'Submit IP...' task in the Process tab.

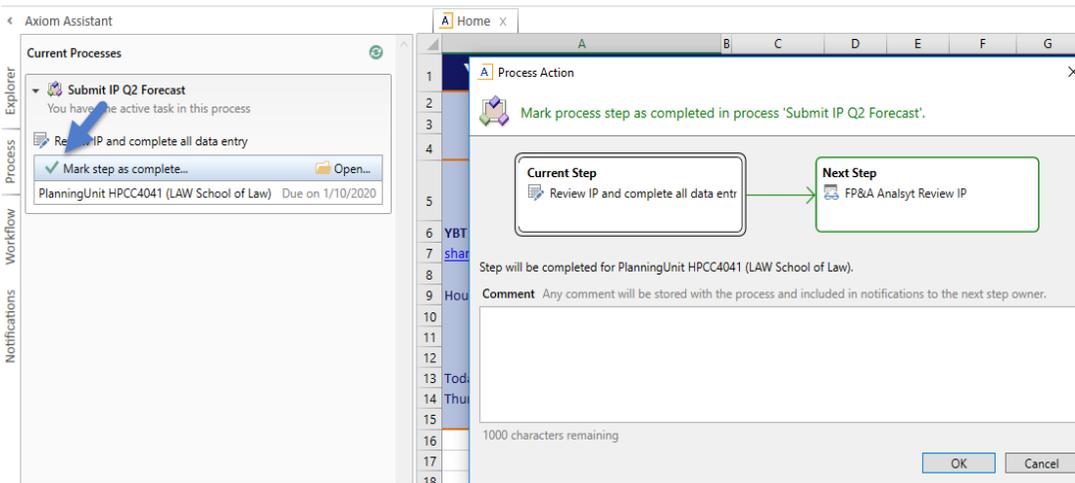


Clicking on the arrow next to 'Submit IP....' Expands the options so that you can either open the IP file to review and enter information or submit the file for Budget Office review. To open the file click on the file name and select 'Open' or double click on the file name.

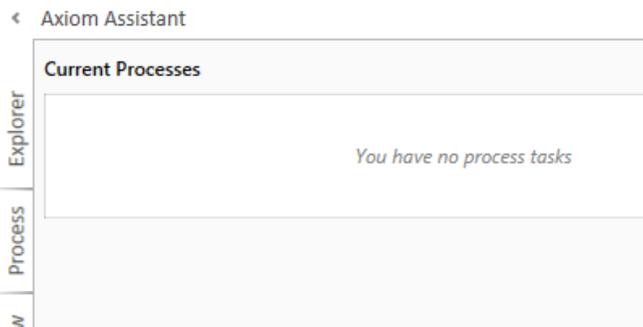
During this stage, you can also access the IP file Read/Write on the Axiom toolbar.

## Submitting the Institutional Plan (IP) files

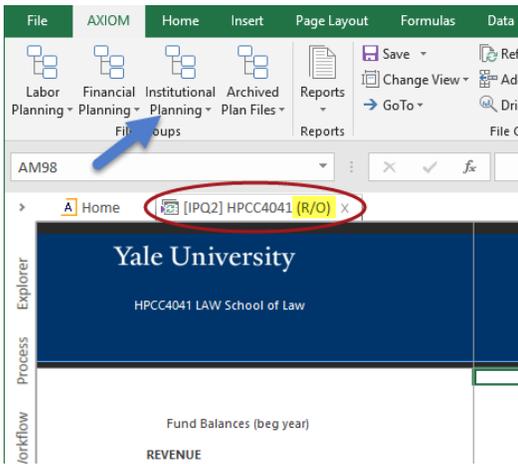
After reviewing the information in the IP and completing all information entry, the next step is to notify the Budget Office Analysts that the file is ready for their review. For this step, you will use Process Management.



To submit the IP to the Analysts, make sure that the IP file is closed and then click on the check mark next to 'Mark step as complete.' The Process Action window will open. Click OK and the submission process will complete and the Analysts will automatically be notified that you have submitted.

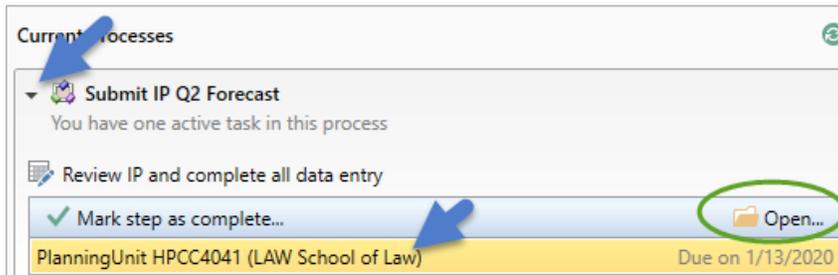


Once the IP has been submitted, the Process task pane will show that you do not have any tasks.



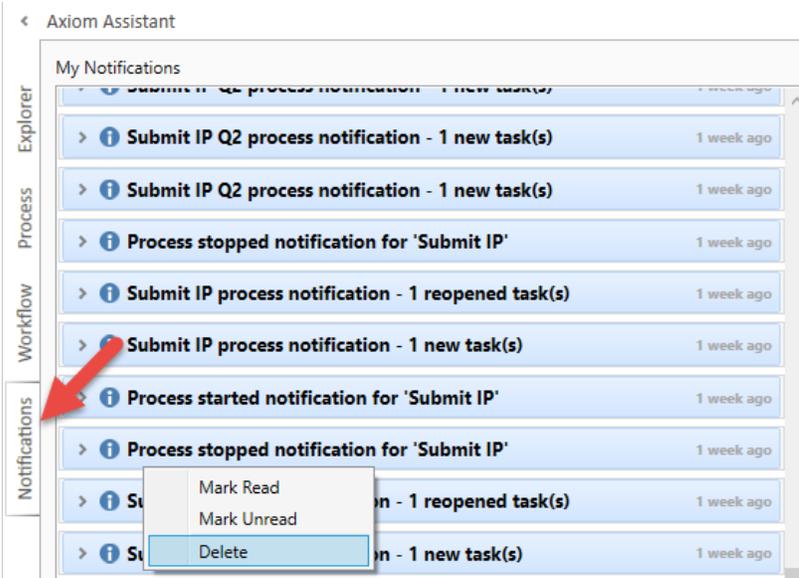
You can still access the IP file from the Axiom Toolbar. Your access to the IP is Read-only at this point in the Process.

### Updating the Institutional Plan (IP) files



If the Budget Office Analysts find an issue in the IP, they will contact you and, in the event an update needs to be made, they will push the file back down to you. If this occurs, you will see the 'Submit IP...' on the Process tab. After you make the necessary updates, save and close the file and click on the check next to 'Mark step as complete.'

### Notifications associated with Process Management



Process Management provides notifications of different tasks that occur related to your IP file. If they accumulate and you would like to clear out the Notifications task pane, you can click on a notification and use the shift and click to select multiple notifications then right click and select Delete.