Axiom Reports Training
Spring 2017
Agenda

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Introductions
Why Axiom?

1. Support for PeopleSoft EPM ending Spring 2017

2. How Axiom was selected
   • Of 10 vendors, they were among only 3 that had the **functionality** we required
   • Most highly rated by UVM *end-users*
   • Most highly rated for **customer service** by existing customers (Gartner)
   • Strong **Higher Ed experience**
Why Axiom for Reporting?

Provides a suite of financial reports that:

- Are usable across multiple levels of the organization:
  - Reports are ready for Sr Mgt consumption but also usable by budget managers on a daily basis
- Enable users to easily drill down or roll-up financial reports with one user interface
- Provide data across almost all Funds*
- Are consistent across the entire University
- Easily auditable back to Peoplesoft

* Excluding Fund 300 (Sponsored Projects)
Reports

- Enhancement to PeopleSoft reports
- Replacement for Office of Operational Excellence’s Excel reports for Gift & Endowments and General Fund
- Quarterly certification transition timeline to be determined
- Non-Sponsored Projects Report to be developed (Sponsored Projects reporting not in scope)
- Hierarchy of Reports distinguished by level of detail provided
Reports

listed in order of most detail

1. Detail by Fund
   - to see Income Statement/Transaction Details

2. Summary by Fund
   - (100,130,131,150,305,900)
   - (108)
   - (3xx)
   - to see Summary Level Data for a given Fund

3. All Funds View
   - to see Total Available Resources across all Funds
Reports

- Use Reporting Unit: Dean and VP level
- Reports are as-of period end
- Data updated on a nightly basis
- Revenue is displayed as positive number *unlike PeopleSoft*
  - Calculations take this into account
- Net asset surpluses displayed as positive; net asset deficits displayed as negative, *unlike PeopleSoft*
- Refresh variables define *how you look at the data*; the underlying data/tables that reports pull from doesn’t change.
<table>
<thead>
<tr>
<th>Report Characteristics</th>
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<tbody>
<tr>
<td>Report</td>
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Report Functionality

1. Refresh Variables
   - update report with the most current data
   - prompted to define values
   - selected values will be applied to report to impact the data refresh

2. Quick Filter
   - temporarily apply a filter to report

3. Drill
   - drill into a particular row so that you can see the detail on that row by chartstring, chartfield value, or transaction level detail

4. Change View
   - change the report row and column display between pre-defined layouts

5. Print/Snapshot/Email
   - print, snapshot (copy to excel) for further manipulation, or email (with a snapshot, or as a report with QuickFilter)
Demos
Login

1. Go to https://uvm.axiom.cloud/

2. If prompted with UVM’s authentication page, enter your netID and password
   - (If you have already authenticated into another UVM system such as PeopleSoft or webmail, you will bypass this page)

3. Web browser specific steps
   - If using Internet Explorer go to step 4
   - If using Chrome or Firefox click on "Download" in upper-right corner
   - Then click appropriate link for your browser

4. Double-click on **Windows Client**
   - Installing the application for the first time may take several minutes
   - Installation dialogue box will pop up click “Install”
   - The installer will run and then launch the application
Login – continued

View after selecting Windows Client
Explore on your own
Scavenger hunt
Additional Slides