Axiom Budget Training
Spring 2017
Agenda

Introductions

Budget Overview

Why Axiom

Budgeting Activities
  • Single Year Salary Planning
  • Single Year Line Item Budgeting

Reports

Key Budget Dates

Demos

Where to get help

Appendix
Introductions
What’s staying the same?
- Processes for Single-Year Salary Planning & Line-Item Budgeting
- Timeline (open April 3; close May 26th)

What’s changing?
- New software: Axiom
- New VP/Dean Budget Certification
- No position budgeting/roster
- No required submission of “Green Reports”
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
Budgeting Activities

Single-Year Salary Planning
- Set salaries and distributions for employees in home dept

Single-Year Line-Item Budgeting
- Enter budgets by chartstring for General Fund & Income/Expense
Single-Year Salary Planning

Same Process as Last Year

Data
- Employee load as of March 30
- Plan files are done at the dept level (home dept of employee)

Salary Distributions
- Need to be from 7/01/17 thru 6/30/18
- Must equal 100%
- Can use any chartstring regardless of fund
- Follow University Salary Guidelines

Exception Codes
- Use exception codes when applicable

ePARs
- Need to be submitted if change in term or FTE

Terminations
- If an employee will be terminated by 7/1 remove the employee from Axiom to prevent a new year record in HCM.

Kronos
- Employees paid through KRONOS salary distributions must use this chartstring:
  58100-01-00001-100-000100-000-0000-0123-0000
Single-Year Salary Planning

Changes/Enhancements from Last Year

New Layout of Plan File

- Alphabetical by employee
- No clean-up of employees needed

New Functionality

- Enter comments by employee
- Enter attachments by Plan File
- Enter formulas to calculate raises
- Filter plan file by Union Status, Term, Name
- Enter salary increases by category (i.e. ATB$, ATB%, Performance)
- Adjust CY Salary before modeling NY Salary
- Adjust NY Term Begins Date
- Enter proposed NY FTE & proposed NY Term
- Ability to show the hourly rate for 12 month KRONOS
<table>
<thead>
<tr>
<th>Processes</th>
<th>Income Expense</th>
</tr>
</thead>
<tbody>
<tr>
<td>• VPs &amp; Deans must manage to their target amounts</td>
<td></td>
</tr>
<tr>
<td>• Plan files are done at the dept level</td>
<td>• Activities must net to zero</td>
</tr>
<tr>
<td>• Reflect University Guidelines</td>
<td>• Budget must be consistent with rate calculation</td>
</tr>
<tr>
<td></td>
<td>• Significant change to activity requires updated MOU</td>
</tr>
<tr>
<td></td>
<td>• Non-grant charging activities with budgets less than $100k no longer submit rates to FAB</td>
</tr>
<tr>
<td></td>
<td>• Units will complete MOU &amp; Rate Certification Form</td>
</tr>
<tr>
<td>Chartstrings</td>
<td></td>
</tr>
<tr>
<td>• Only Fund 100 &amp; 150</td>
<td></td>
</tr>
<tr>
<td>• Budget in whole dollars</td>
<td></td>
</tr>
<tr>
<td>• Revenue budgets do not have property values</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
<tr>
<td>• Best opportunity for chartstring clean up &amp; additions</td>
<td></td>
</tr>
</tbody>
</table>
New Layout of Plan File

- Fund 100 and Fund 150 are in the same plan file
- Historical data and last year’s budget amount are shown
- E-levels grouped by revenue and expense
- Revenue enter as a positive #
- No use of the letter “S” as was required in EPM

New Functionality

- Enter formulas
- Benefits autocalculated
- Summarize by e-level
- Refresh Variables to filter plan file by Fund, Purpose, Source, etc.
- Displays grand total for easy reconciliation of I/E
- Comments
- Attach documents
- Chartfield values updated overnight automatically (through May 25)
Position Budgeting/Roster

- Position budgeting (PAM) and Roster will be replaced by a new multi-year salary planning process and functionality in Axiom this fall
- No position budgets need to be entered as part of budget process
- No Roster needs to be submitted to FAB as part of budget process
- April 14 is the last day to access the Roster
- Run and save a local copy of the Roster by April 14 if desired
Log into Axiom and follow path to Reports Library / SY REPORTS folder.

- Run Diagnostics before submitting plan files in Axiom.
- Do not submit Diagnostics to FAB.

Diagnostic Reports

1. Salary Dist. not equal to 100%
2. Salary Dist. to Closed Project
3. Salary Dist. vs. Home Dept
4. Salary Dist. vs. Salary Budget
5. Target Total
Log into Axiom and follow path to Reports Library / SY REPORTS folder.

- Run Reports before submitting plan files in Axiom.
- Do not submit Reports to FAB.
- Save a local copy of Reports if desired.

**Reports**

1. Budget Recap
2. Percent Increase
3. Salary Distribution
Log into Axiom and follow path to Reports Library / SY REPORTS folder.

- After review and reconciliation of Diagnostics and Reports is completed
- Print VP Dean Budget Certification report and obtain Dean/VP signature
- Scan and save signed copy of VP Dean Budget Certification to:

  S:\fab_budget\FY 2018\unit or target name\Green Reports
Key Budget Dates

- March 21  I/E Targets to units
- April 3  Axiom opens to end-users
- April 17  I/E Rate Calculations to FAB
- May 1  General Fund Targets to units
- May 26  Line-Item and Salary budgets submitted via Axiom
Demos
Axiom Training Tools

Axiom Home Page

1. User Guides
2. Video Tutorials
3. FAB’s website Budget-Building Materials
4. Submit Footprint
   • If unable to resolve a technical issue
   • If you need security access
5. Announcements
Appendix: Training Tips

Below applies to both Salary and Line Item Budgeting

Performance
- If you need to use Axiom from home, if possible avoid logging into the VPN as it will significantly slow performance.
- Use Refresh Variables to limit data and improve save times.

Functionality
- After Copy, Delete, or Add New, save your plan file to see changes.
- Use “Paste Special” when pasting to retain template formatting; if you "paste" you will overwrite the formulas.

Save Message
- The save message box summarizes the save actions across multiple Axiom tables. If the message box returns all zeros, no data saved; if there are non-zero #s, something saved.
# Appendix: Training Tips

## SY Salary

### Complex Distributions
- Using Refresh to filter on one person at a time will improve save times and will help you “keep your place” in the file.

### Refresh Variable
- When using Refresh Variable to filter on salary account(s), also select corresponding benefits account(s) in order to see benefit amount.
- Refresh Variable does not save plan file. Before you use Refresh Variable, save any work you have entered. Otherwise it will be lost.
- When using Refresh Variable to filter on all Revenue Accounts the <<Add New E-Level>> will not show in plan file. Remove filter to see the option.

### Term
- For employees going from 12-month term to <12-month term, there is no way to adjust the start date to other than 7/1 to make the salary distribution calculation come out correctly.

## SY Line Item

### CY Budget
- CY budget will be displayed accurately at the beginning of the process. Deleting chartstrings will also remove the associated CY budget amounts from the file.

### Duplicate Chartstrings
- If you save the plan file while duplicate chartstrings are present, Axiom will aggregate the $ amount into one line on the actual data table. Axiom will not display an error on save.

### Mass Delete
- Mass delete all lines in an E-level by copying/pasting the capital "X".
Appendix: Plan File Functionality

**Save**
Click “Save” (or CTRL-S) to save your data and reload the plan file.

“Save” will open a pop-up that asks you whether you are ready to advance your file to the next process or workflow step (see the “Workflow” section below for more information).

Choose “Save Data Only” from the Save dropdown to save your data without being prompted to advance the file to the next process step.

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

**GoTo**
Use the “GoTo” dropdown to go immediately to a specific e-level account or individual.

**Refresh**
Selected values will be applied to plan file to impact the data refresh.

**File Attachment**
To upload additional documentation or notes to your plan file, or to view or reference previously saved attachments in the future.

**Print/Snapshot/Email**
Print, snapshot (copy to excel) for further manipulation, or email.

**Not applicable**
Quick Filter and Drill are only available in Axiom reports. Use Refresh in place of Quick Filter.
Appendix: Log-In Instructions

1. Go to [https://uvm.axiom.cloud/](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
Appendix: Log-In Instructions

View after selecting Windows Client