



SINGLE-YEAR LINE-ITEM BUDGETING

TABLE OF CONTENTS

- OPENING A PLAN FILE 2
- GENERAL NAVIGATION 4
- ENTERING NEW YEAR LINE-ITEM BUDGETS..... 5
- VIEWING CY BUDGET-BASE DATA..... 6
- VIEWING HISTORICAL DATA..... 7
- ADDING, DELETING & MODIFYING CHARTSTRINGS 8
 - Adding a Chartstring 8
 - Deleting a Chartstring..... 9
 - Modifying a Chartstring..... 10
 - Adding a New E-Level 10
- BENEFIT CALCULATIONS 11
- FILTERING CHARTSTRINGS BY CHARTFIELD VALUES..... 12
- SUMMARY VIEW OF BUDGETED LINES..... 14
- ADDING COMMENTS 15
- DIAGNOSTIC TOOLS & REPORTS 16
- PROCESS MANAGEMENT / WORKFLOW 18
 - Preparers 18
 - Reviewers 22

Need help? Please [submit a Footprint](#)

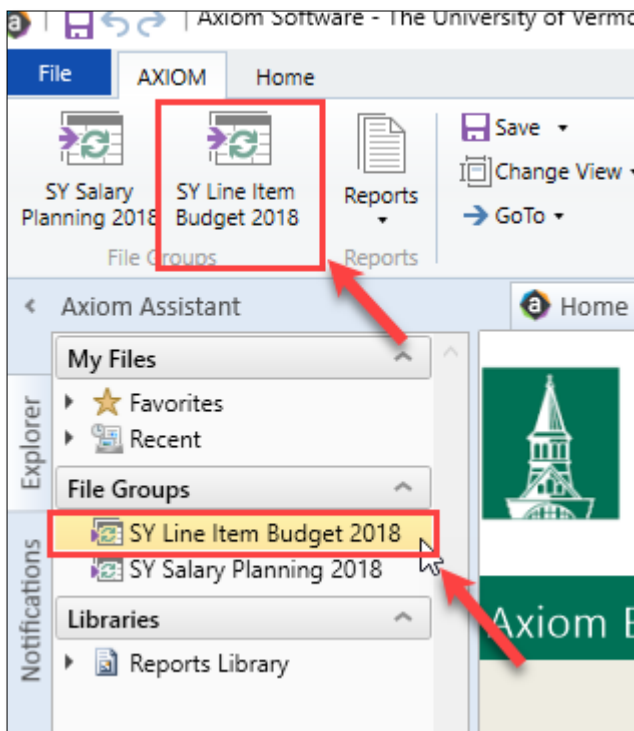


OPENING A PLAN FILE

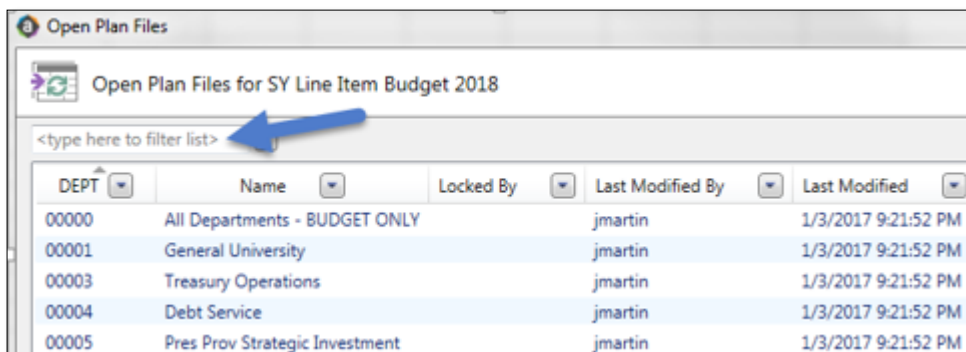
A Plan File is the form used to enter your single-year line-item budget.

- Each department has a Plan File containing the line-item budget detail for **both Fund 100 and Fund 150**.
- No other funds are budgeted in Axiom.
- Plan Files contain all F100 and F150 active PeopleSoft chartstrings from the current fiscal year, including those with a \$0 budget.

1. To open a Plan File, click “SY Line Item Budget 20XX” icon in the top-left of the Axiom ribbon, or, in the left-hand Axiom Explorer Pane, go to **File Group**→**SY Line Item Budget 20XX** and double-click on “SY Line Item Budget 20XX.”

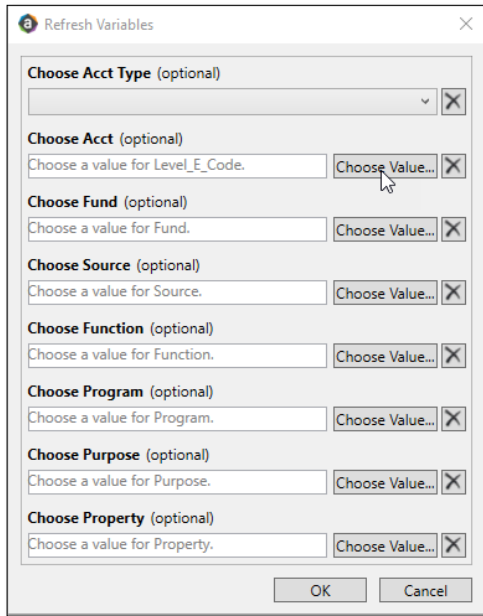


2. A pop-up will open. You will see a list of the departments to which you have budgeting access. Select the Plan File you’d like to work on, or search from the list by entering the Department number or name of the Plan File in the filter box. Double-click on the Plan File, or select it and click “OK.”

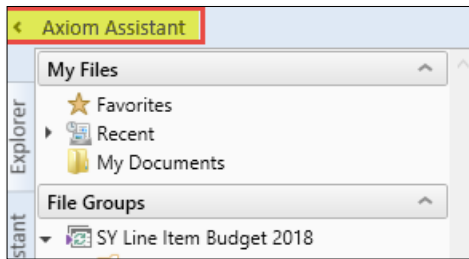




3. The Refresh Variables pop-up will open. Click “OK” to open the entire Plan File and see all chartstrings, or choose one or more of the filters available to see only a subset of chartstrings and then click “OK.”



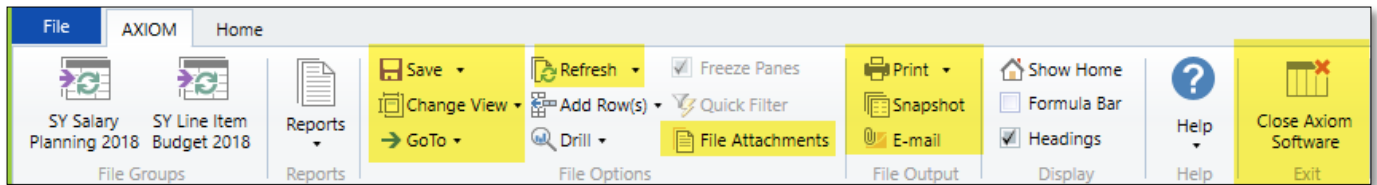
4. The budgeting worksheet will open. To maximize the input screen, click on the arrow next to Axiom Assistant to hide the left-hand navigation pane.





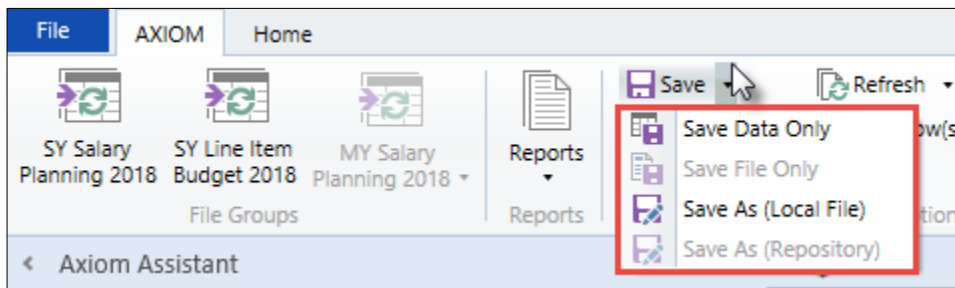
GENERAL NAVIGATION

The Axiom toolbar contains several buttons for access to key functionality:



Save: Click “Save” (or CTRL-S) to save your data and reload the Plan File.

- Clicking “Save” will open a pop-up that asks you whether you are ready to advance your file to the next process step (see the [Process Management / Workflow](#) section below for more information).
- While working on entering data choose “Save Data Only” from the Save dropdown to save your data without being prompted to advance the file to the next process step.
- Choose “Save As (Local File)” to save a local copy of the Plan File to a shared folder, My Documents, or your desktop. (You may also choose to use snapshot to save a copy of the file for manipulation outside of Axiom).
- “Save File Only” and “Save As Repository” are not available options. “Save File Only” would save the Plan File, but not your data.



Change View: The “Change View” dropdown lets you toggle among different views of your Plan File data, such as “Show Comments” and “Summary E-levels.”

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

Refresh: The “Refresh” button lets you filter your Plan File by Account, Fund, Source, Function, Program, Purpose, or Property to view and budget only a subset of chartstrings at a time. See the [Filtering Chartstrings by Chartfield Values](#) section below.

File Attachments: Click “File Attachments” to upload additional documentation or notes to your Plan File, or to view previously saved attachments in the future.

Print: Print a hard-copy of the Plan File by selecting one of the layouts from the “Print” dropdown.

Snapshot: Use the “Snapshot” button to create an electronic copy of your Plan File that you can save locally and edit or annotate in Excel (outside of Axiom).

Email: Use the “Email” button to email a snapshot of the Plan File to yourself or a colleague.

Revised 3.2022



Close Axiom Software: Click the “Close Axiom Software” icon to close the application after you have saved your work.

NOTE: The “Quick Filter” button is grayed out because this functionality is not applicable to line-item budgeting. Use “Refresh” to filter your Plan File by specific chartfield values.

ENTERING NEW YEAR LINE-ITEM BUDGETS

In the line-item budget input form, E-levels and their associated chartstrings are presented in a “P&L” format: revenue chartstrings will appear at the top of the sheet, followed by expense chartstrings below, with salary and wage expense lines followed by operating expense lines. (This is the same order in which E-levels appear in the Axiom “Detail by Fund” report.)

Below is a screenshot of some basic navigation related to entering line-item budgets:

1. Enter New Year budget amounts in the blue highlighted cells (Column CT).
 - Revenue is entered as a positive (“+”) number
 - Expense is entered as a positive (“+”) number
2. When a budget is entered, the percent increase (Column CU) and dollar change (Column CV) are calculated as compared to the Current Year Budget (Column CP). This data is informational only.
3. As budgets are entered, they flow to the summary total located in the top right corner of the Plan File (Columns CT-CV). The values in this box will be used to reconcile to targets as applicable. A red warning will display if Fund 150 revenue and expense budgets do not net to zero.

CT	CU	CV
Must Balance F150	Fund 100	Fund 150
Balance	(432,300)	20,456
Revenues	-	80,000
Expenses	432,300	59,544

4. In addition to entering the budget amount directly, you can also enter a cell formula (calculation). The formula will be visible until you save; after saving the formula is replaced with the resulting saved value.



Level	Acct	OU	Fund	Source	Funct	Prog	Purp	Prop	CY Budget-Base	E-level \$ Inc	Investments	Proposed Tgt.	New Year Budget	% Inc/Dec	\$ Inc/Dec																																																																																																																																																																																																																													
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VIEWING CY BUDGET-BASE DATA

Current year budget data is shown in Plan Files. It will look different depending if you are viewing a department associated with a Responsibility, Hybrid, or Support Center.

Responsibility & Hybrid Center

CY Budget-Base column represents IBB 1.0 budget figures.

The University of Vermont										Fund 100	Fund 150		
Budget Input Form - Dept Responsibility Center										Balance	-	-	
Level Acct										Revenues	-	-	
OU Fund Source Funct Prog Purp Prop										Expenses	-	-	
										CY Budget-Base	New Year Budget	% Inc/Dec	\$ Inc/Dec

Support Center

CY Budget-Base column represents original budget figures not revised.

Support Center departments contain three additional columns

- **E-level \$ Inc** display dollars associated with the percent increase applied to Fund 100 on that E-level university-wide.
- **Investments** are unit-specific increases or decreases to the budget.
- **Proposed Tgt** is the sum of the three preceding columns: CY Budget-Base + E-Level \$ Inc + Investments.

The University of Vermont										Fund 100	Fund 150					
Budget Input Form - Dept Support Center										Balance	-	-				
Level Acct										Revenues	-	-				
OU Fund Source Funct Prog Purp Prop										Expenses	-	-				
										CY Budget-Base	E-level \$ Inc	Investments	Proposed Tgt.	New Year Budget	% Inc/Dec	\$ Inc/Dec



VIEWING HISTORICAL DATA

Historical data is located in the far right columns of the Plan File.

1. Current Year YTD in column CY displays this year's actuals as of the date shown.
2. Historical actuals for the two prior full fiscal years are displayed in columns CZ and DA.
3. Actuals figures tie to the exact chartstring in each line, and only chartstrings valid in the current year are shown.

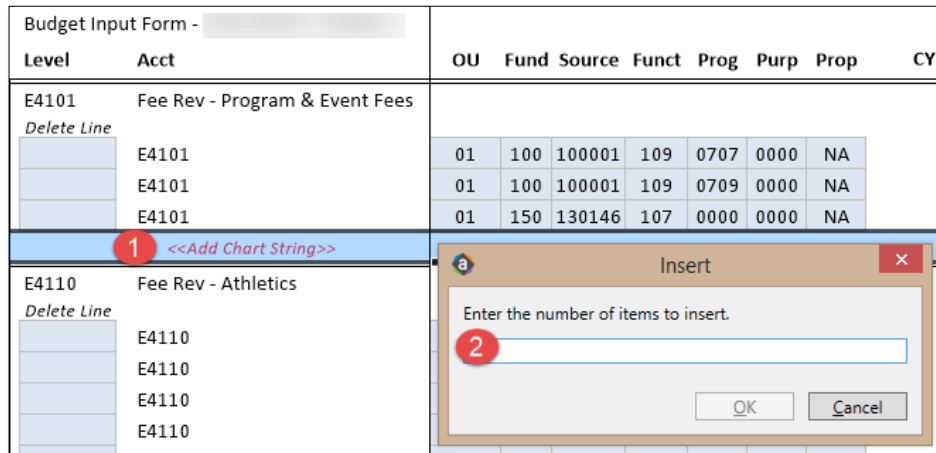
CT	CU	CV	CX	CY	CZ	DA
	Fund 100	Fund 150				
Balance	(281,579)	-		3	NOTE: Actuals only reflect exact line items. There may be several lines of actuals not seen here. Only CY budget chartstrings are shown.	
Revenues	-	-				
Expenses	281,579	-				
New Year Budget	% Inc/Dec	\$ Inc/Dec		Current YTD as of		
				3/14/2017	2016 Actuals	2015 Actuals
				1	2	
	187,230	3.00%	5,453			
	187,230	3.00%	5,453	120,342	155,171	234,150



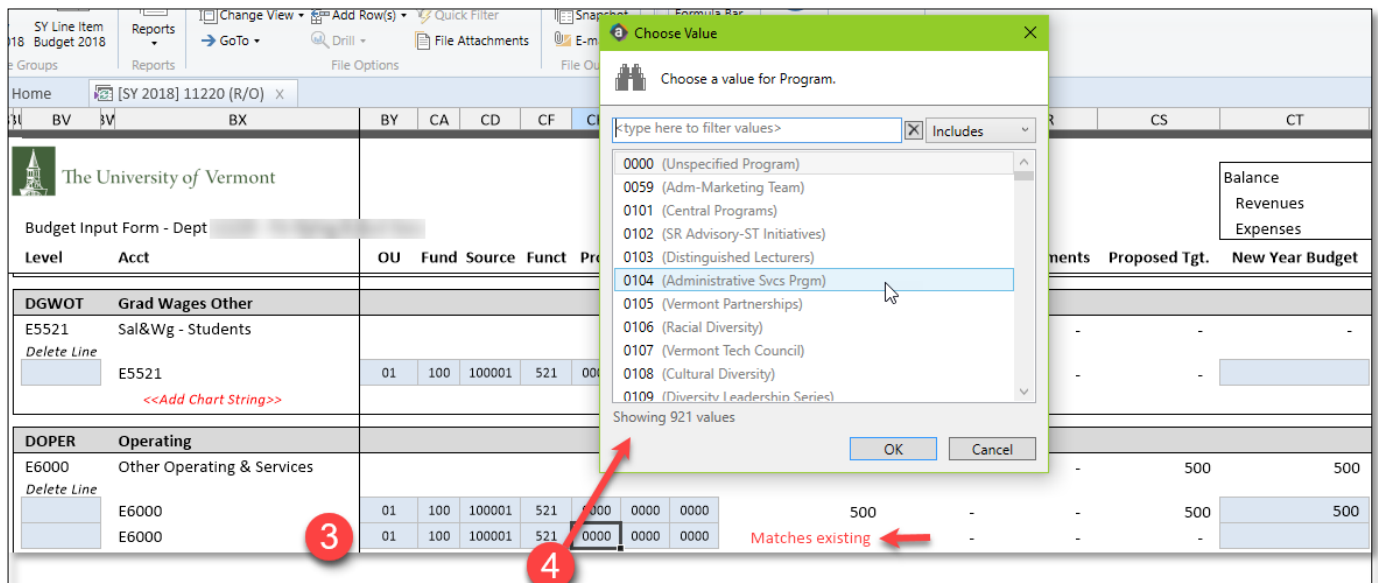
ADDING, DELETING & MODIFYING CHARTSTRINGS

Adding a Chartstring

1. Click on the <<Add Chart String>> link at the bottom of the appropriate E-Level account.
2. Enter the number of new chartstring lines you wish to add and click OK.



3. A new chartstring line will appear. The chartstring will be identical to the line above and have a "Matches existing" label.
4. You can double-click in any of the chartfield values and select from a list of existing values to modify the chartstring. You can enter either the number or text description of the value you wish to select. Click OK.





NOTE: When adding more than one line, be mindful of Axiom’s auto-populate feature. When multiple new lines are added, each new line will populate with the originating row’s chartstring values.

The following tips are recommended:

- (1) Make any edits needed to existing chartstrings and save plan file *before* adding/copying new ones.
- (2) When modifying newly added chartstrings, work from top to bottom.

Deleting a Chartstring

1. Select the “X” from the dropdown box under “Delete Line” next to the chartstring you want to delete.

Level	Acct	OU	Fund	Source	Funct	Prog	Purp	Prop	CY Budget-Base	E-level \$ Inc	Investments	Proposed Tgt.	New Year Budget
DEXSL	External Sales												
E4501	Product Sales and Svcs Income								175,000	-	-	175,000	175,000
	Delete Line												
	E4501	01	100	100001	109	0000	0000	NA	-	-	-	-	
	E4501	01	100	100001	109	0000	0496	NA	-	-	-	-	
	E4501	01	100	100001	109	0000	0535	NA	-	-	-	-	
	E4501	01	100	100001	109	0000	0539	NA	-	-	-	-	

2. Click “Save” located at the top of the Axiom ribbon. You will receive a pop-up message indicating the number of records saved, deleted, updated. **Click OK.**

Mantra “SAVE AND SAVE OFTEN” when working in SYSP and SYLI to prevent loss of work from save data error messages.

If you add new chartstring(s) and try to delete from the newly added rows, you may encounter a save data error. To prevent this situation, save the Plan File again after adding new chartstring(s) BEFORE deleting any rows in the newly added section. The rationale for this is the original save to populate new chartstring(s) for viewing in the Plan File did not yet save them to supporting data tables. The system cannot delete data that does not yet exist in the data tables hence the data save error message.



Modifying a Chartstring

Change any existing chartstring by double-clicking in any chartfield value and selecting the new replacement value.

Adding a New E-Level

If you need to add a chartstring to an E-level not currently in the Plan File, go to the bottom of the Expense E-Levels (just above the Benefits section) and select <<Add New E-Level>>.

A new, blank chartstring line will appear. Double-click in each of the chartfield values, including E-level account, and select from the list of existing values to modify the chartstring. You can enter either the number or text description of the value you wish to select. Click OK.

	<<Add Chart String>>		
2	Exxxx	New E Level	-
	Delete Line		
		Exxxx	
		<<Add Chart String>>	
1	<<Add New E-Level>>		
	DBENF	Benefits	<i>No Benefit Input Allowed - Not Fully Calculated Until "SAVE"</i>



BENEFIT CALCULATIONS

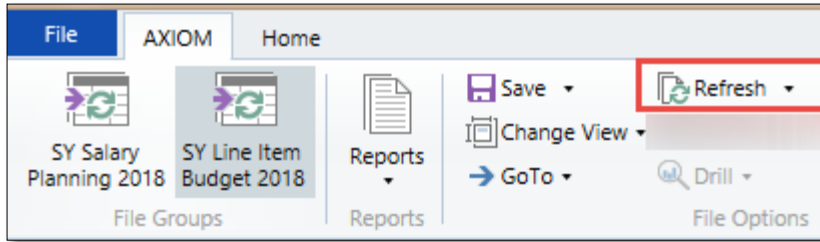
At the bottom of each Plan File there is a Benefits section. When the user enters an E5xxx salary budget, the associated Benefits chartstring will automatically calculate the appropriate benefit amount associated with that E-Level and chartstring. No user input is allowed in the Benefits section.



FILTERING CHARTSTRINGS BY CHARTFIELD VALUES

If you wish to isolate a certain group of chartstrings (e.g., Fund 150 or Fund 100, Program value, F150 Source value), click on the Refresh tab on the Axiom ribbon. If you've used Refresh Variables to isolate a subset of chartstrings, then entered a value, **you must save before deselecting** that Refresh Variable, or your input will not save.

- 1. Click on Refresh on Axiom toolbar.



- 2. The Refresh Variables pop-up will appear. Select the value(s) you wish to filter by and click OK.

Budget Input Form		OU	Fund	Source	Func	Prog	Purp	Prop
DEXSL	External Sales							
E4501	Product Sales and Svcs Income							
<i>Delete Line</i>								
E4501		01	100	100001	109	0000	0000	NA
E4501		01	100	100001	109	0000	0496	NA
E4501		01	100	100001	109	0000	0535	NA
E4501		01	100	100001	109	0000	0540	NA
E4501		01	100	100001	109	0000	0541	NA
E4501		01	100	100001	109	0000	0550	NA
E4501		01	100	100001	109	0703	0000	NA
E4501		01	100	100001	109	0703	0639	NA
E4501		01	100	100001	109	0703	0644	NA
E4501		01	100	100001	109	0728	0000	NA
<<Add Chart String>>								
DFEES	Fees							
E4051	Fee Rev - Student Fees							
<i>Delete Line</i>								
E4051		01	100	100001	101	0000	0000	NA

Refresh Variables

Choose Acct Type (optional)

Choose Acct (optional)
Choose a value for Level_E_Code. Choose Value...

Choose Fund (optional)
Choose a value for Fund. Choose Value...

Choose Source (optional)
Choose a value for Source. Choose Value...

Choose Function (optional)
Choose a value for Function. Choose Value...

Choose Program (optional)
Choose a value for Program. Choose Value...

Choose Purpose (optional)
0639 Choose Value...

Choose Property (optional)
Choose a value for Property. Choose Value...

OK Cancel



3. The new output will contain only the chartstrings you've requested:

The University of Vermont		Current Filter = Purpose.Purpose IN ('0639')						
Budget Input Form								
Level	Acct	OU	Fund	Source	Funct	Prog	Purp	Prop
DFEES Fees								
E4051	Fee Rev - Student Fees							
<i>Delete Line</i>								
	E4051	01	100	100001	109	0703	0639	NA
<<Add Chart String>>								
DEXSL External Sales								
E4501	Product Sales and Svcs Income							
<i>Delete Line</i>								
	E4501	01	100	100001	109	0703	0639	NA
<<Add Chart String>>								
DFASL Faculty and Admin Salary								
E5020	Sal&Wg - Instr Fac NonTnr Trk	44.1%						
<i>Delete Line</i>								
	E5020	01	100	100001	701	0703	0639	0000
<<Add Chart String>>								

NOTE: Always **SAVE** before selecting or deselecting Refresh Variables, or else any data input since the last save will be lost!



SUMMARY VIEW OF BUDGETED LINES

To see your budget aggregated at the E-Level, go to **Axiom ribbon**→**Change View**→**Summary View**.

Example of output:

The University of Vermont				Fund 100		Fund 150					
Budget Input Form - Dept 51020 - Animal and Veterinary Sciences				Balance	(1,906,500)		-				
				Revenues	-		260,257				
				Expenses	1,906,500		260,257				
Level	Acct	OU	Fund Source	Funct	Prog	Purp	Prop	CY Budget-Base	New Year Budget	% Inc/Dec	\$ Inc/Dec
DOINC Other Income											
E4531	Other Auxiliary Income							-	1,500	N/A	1,500
DFEES Fees											
E4051	Fee Rev - Student Fees							7,850	7,900	0.64%	50
E4058	Fee Rev - Board Fees							-	28,600	N/A	28,600
E4101	Fee Rev - Program & Event Fees							-	3,000	N/A	3,000
E4603	Fees - Other							1,520	-	-100.00%	(1,520)
DEXSL External Sales											
E4501	Product Sales and Svcs Income							218,486	197,831	-9.45%	(20,655)
DINSL Internal Sales											
E4800	Inc - Internal Charge							47,694	16,500	-65.40%	(31,194)
DPRYR Prior Yr Carryforwards											
E4649	Prior Yr Carry Forwd BO							-	4,926	N/A	4,926



ADDING COMMENTS

Axiom allows you to add comments associated with each chartstring.

1. On the Axiom ribbon, go to **Change View** → **Default View with Comments**
2. Blue-highlighted fields for comments will appear in column DC, to the right of the actuals data. Comments are limited to 150 characters.

The screenshot shows the Axiom software interface. At the top, the 'Change View' dropdown menu is open, with 'Default View with Comments' selected. A red circle with the number '1' is placed over this menu item. Below the menu, a data table is displayed. The table has columns for 'Level', 'Acct', 'Current YTD as of 3/14/2017', '2016 Actuals', '2015 Actuals', and 'Comments (max 150 characters)'. A red circle with the number '2' is placed over the 'Comments' column header. The table contains three rows of data for different chartstrings: E6012, E6050, and E6320. Each row has a blue-highlighted text box in the 'Comments' column, with the first one containing the text 'Type a comment here'.

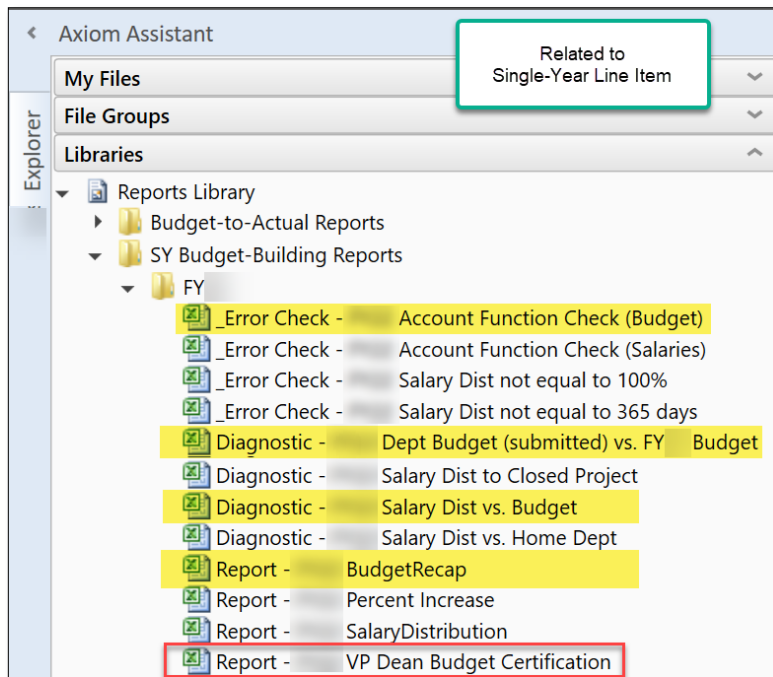
Level	Acct	Current YTD as of 3/14/2017	2016 Actuals	2015 Actuals	Comments (max 150 characters)
E6012	Postage & Shipping	233	389	3	Type a comment here
E6050	Travel	3,464	4,524	2,622	
E6320	Telephone & Related Charges	1,787	4,475	3,450	



DIAGNOSTIC TOOLS & REPORTS

There are one error check, two diagnostics, and one report available for line-item budgeting, as well as one required certification. All are available in the Reports Library > SY REPORTS folder.

Double-click on any report to run it. A Refresh Variables pop-up window will open. Choose your Reporting Unit (College, School, or Division) and then the Fund (100, 150, or both). The report will display only the data for the departments to which you have been granted access for line-item budgeting. If you choose a Reporting Unit to which you do not have access, the report will be blank.



Diagnostic Tools

- Run before submitting plan files to FAB.
- Do not submit diagnostics to FAB.
 - **Account Function Check (Budget)** checks if combination of account and function are appropriate. Revenue accounts can only be submitted with revenue function. Likewise, expense accounts with expense functions.
 - **Dept Budget (submitted) vs Prior Year Budget** enables you to see the budget totals entered by Reporting Unit, Target Unit, or Subtarget Unit.
 - **Salary Dist vs. Salary Budget** compares the total Fund 100 and Fund 150 salary distributions from the salary Plan File for department to the corresponding E-level salary budgets entered in the line-item budget Plan File. This report enables you to check that there is enough money budgeted in Fund 100 or Fund 150 for department to cover salary commitments to these funds.



Report

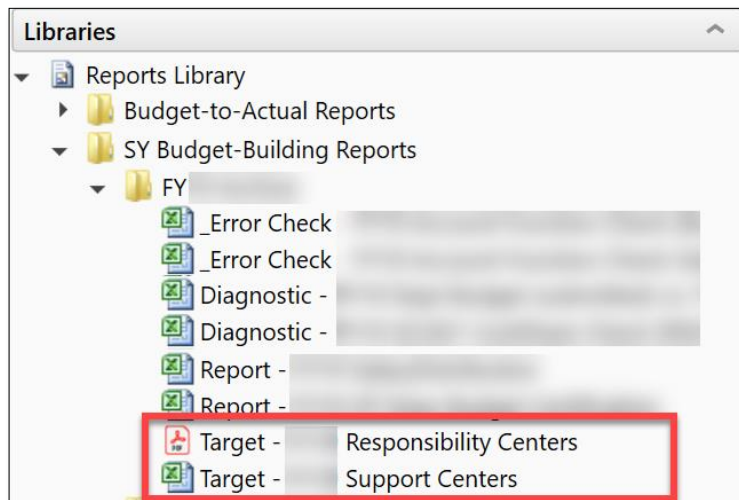
- Run before submitting plan files to FAB.
- Do not submit reports to FAB.
- If desired, save a local copy.
 - **Budget Recap** shows all budgets and associated chartstrings entered, with comments.

Required Dean/VP Certification (for Senior Business Managers)

- Dean or Vice President on the annual budget submission and salary distributions of each Reporting Unit is required.
- Print VP/Dean Budget Certification report and obtain Dean/VP signature.
- **Submit** certification to FAB by scanning and saving a signed copy to:
 - *S:\fab_budget\FY 20xx\unit or target name*

Targets

- Targets for both Responsibility, Hybrid, and Support Centers are distributed via Axiom.
- They are located under folder SY Budget-Building Reports.





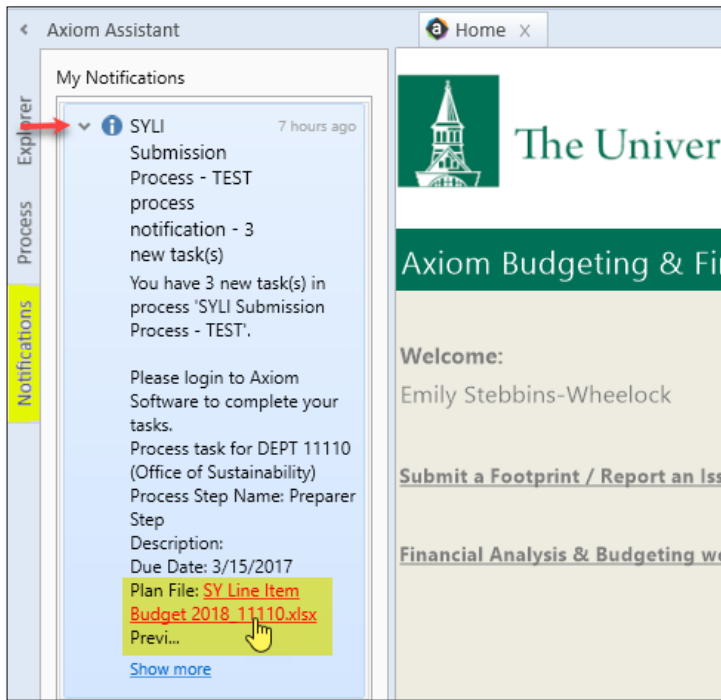
PROCESS MANAGEMENT / WORKFLOW

Axiom’s “Process Management” functionality supports a three-step workflow for line-item budget Plan Files:

1. Budget Preparers enter budgets and submit to their Budget Reviewer
2. Budget Reviewers review prepared budgets (with the option to edit or return them to the Preparer) and submit them to the Financial Analysis & Budgeting (FAB) Office
3. FAB review and final submission

Preparers

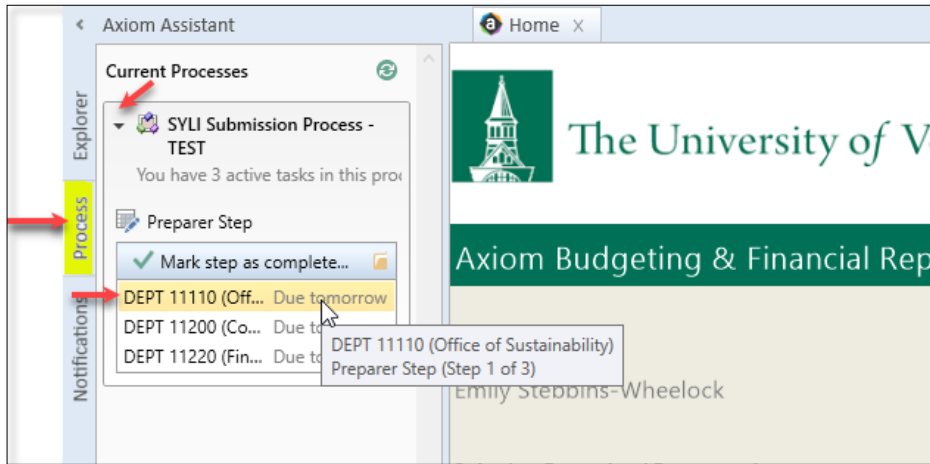
At the beginning of the budget cycle, Budget Preparers will receive an email notification from “noreply@axiomepm.com” that Plan Files are ready to work on. When you log in to Axiom, you will also see notifications in the left-hand Notifications window:



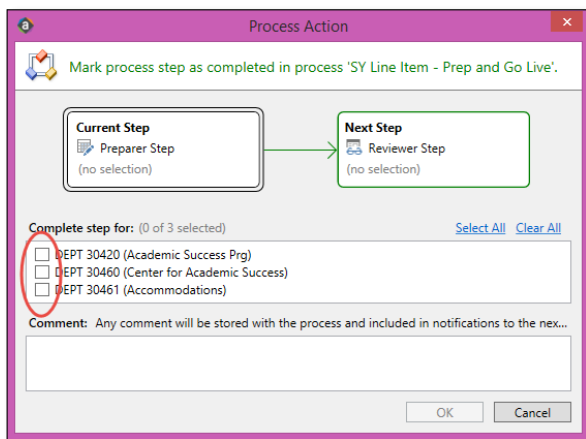
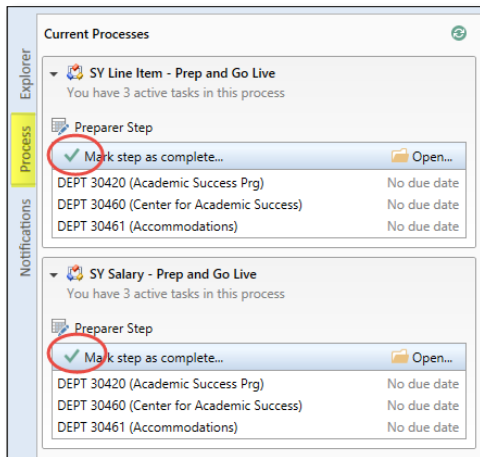
To clear Notifications, right-click on them and choose “Delete.” You can select and delete multiple Notifications at the same time.



You will also see a list of the files that are assigned to you as a Preparer in the left-hand Process pane:

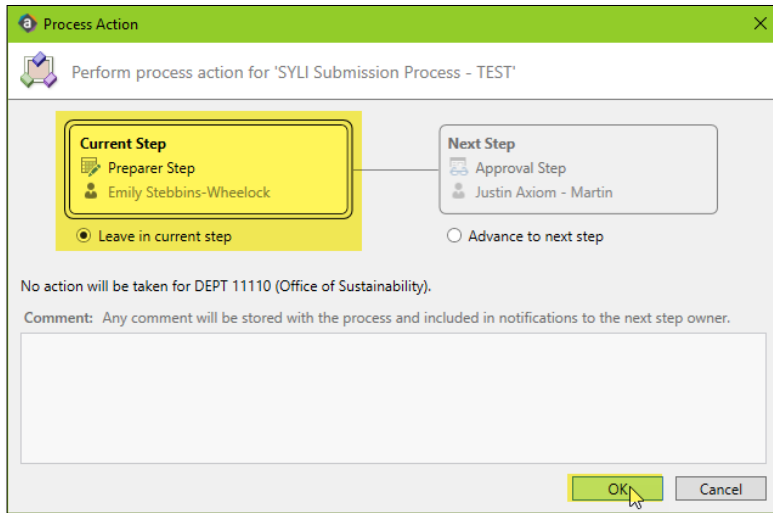


From here you can click on the green check mark to move one or multiple Plan Files to the next process step.

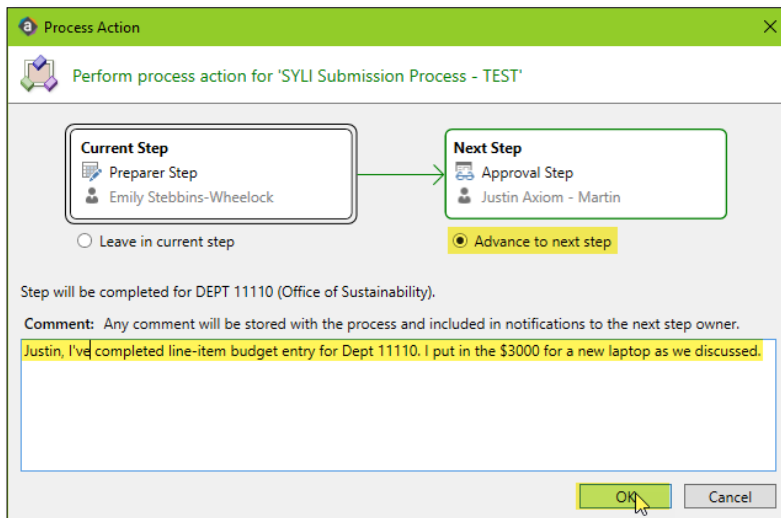




Every time you save a Plan File, a Process Action pop-up window will appear, asking if you are ready to advance the file to the next process step. (If you want to save without triggering the Process Action pop-up, choose “Save Data only” from the dropdown next to the Save button.) The default choice is to leave the Plan File at the current process step. If you are not done working with the Plan File and need to make more changes, click “OK” to leave the file at the current step and continue working.



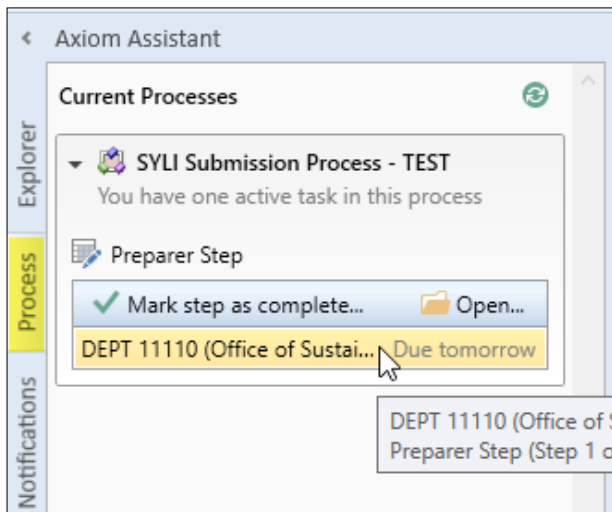
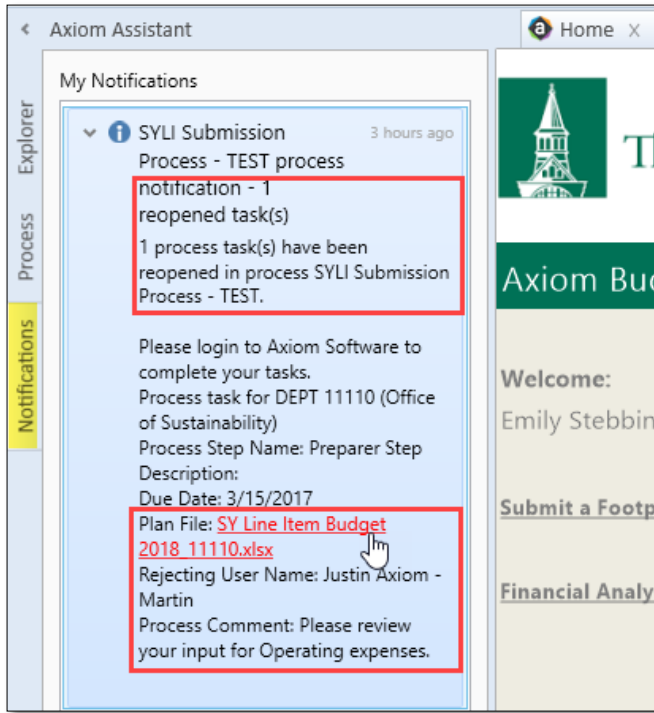
If you are ready to submit the Plan File to your Reviewer, tick the “Advance to the Next Step” button, enter any comments you’d like to pass on, and then click OK.



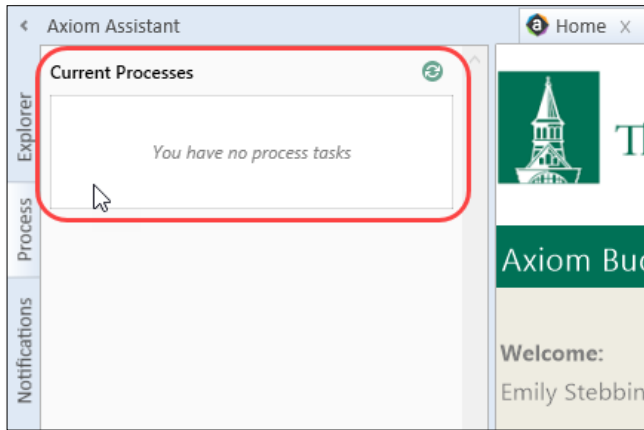
After you advance a Plan File to the next step, you may still open and view it, but you may no longer make or save any changes unless the Reviewer or FAB returns it to you. The Plan File will disappear from the list of available files in the Process pane.



If your Reviewer returns your Plan File to you for further edits, you will receive another email notification from “noreply@axiomepm.com,” and the file will again appear in your Notifications and Process panes:

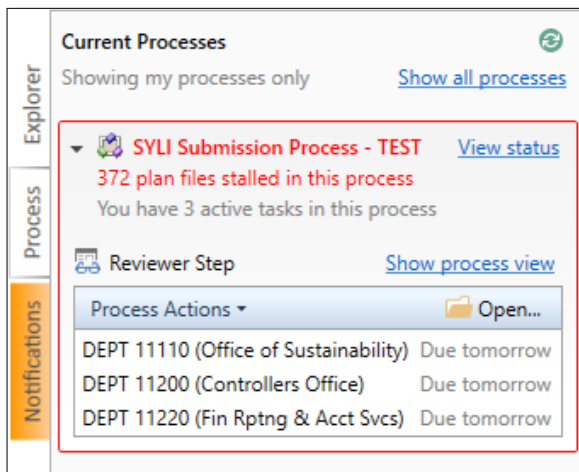


After you have submitted all of your assigned Plan Files to your Reviewer, you will not see any files in the Process pane. You may still view them, but not save them, by opening them from the “SY Line-Item Budget” file group.

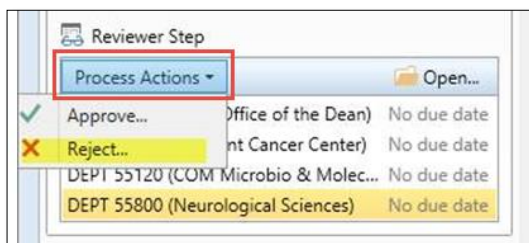


Reviewers

After a Preparer has submitted a Plan File for review, Budget Reviewers will receive an email notification from “noreply@axiomepm.com” that a Plan File is ready for them to work on. When you log in to Axiom, you will see a list of the files that are assigned to you as a Reviewer in the left-hand Process pane, as well as notifications in the left-hand Notifications pane:

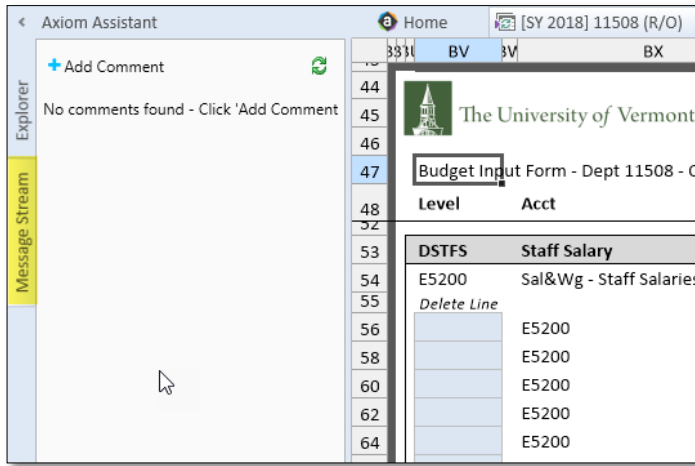


If you need to send a Plan File back to the Preparer click on the desired Plan File and then click on Process Actions. A pop-up will appear as shown below. Click on Reject. There is another method to send Plan Files back to the Preparer discussed in below Workflow process.





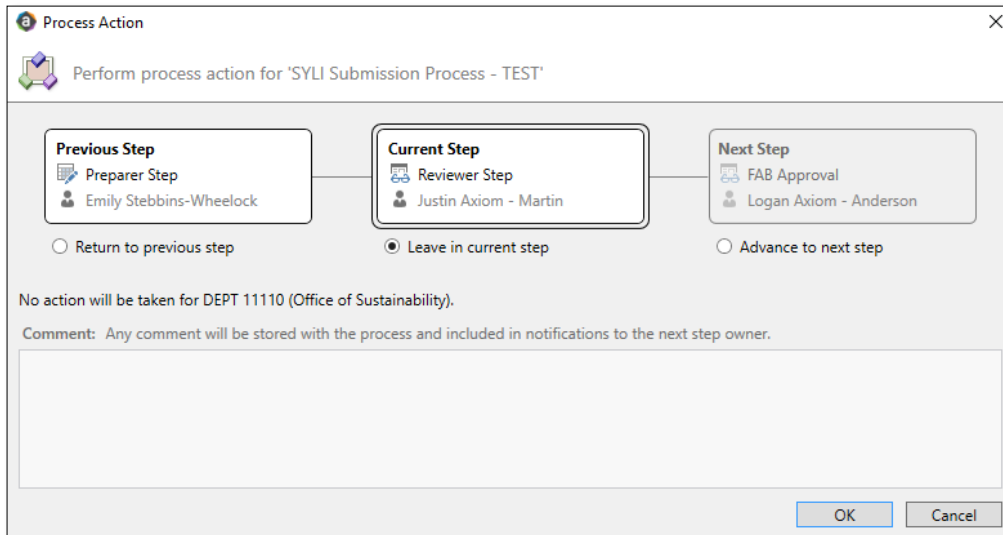
To begin the review process open desired Plan File. If the Preparer has entered any comments associated with this file, you will see them in the left-hand “Message Stream” pane.



As a Reviewer, you can (1) make any desired changes yourself before submitting the file to FAB, (2) submit the file to FAB as-is, or (3) return the file to the Preparer for editing.

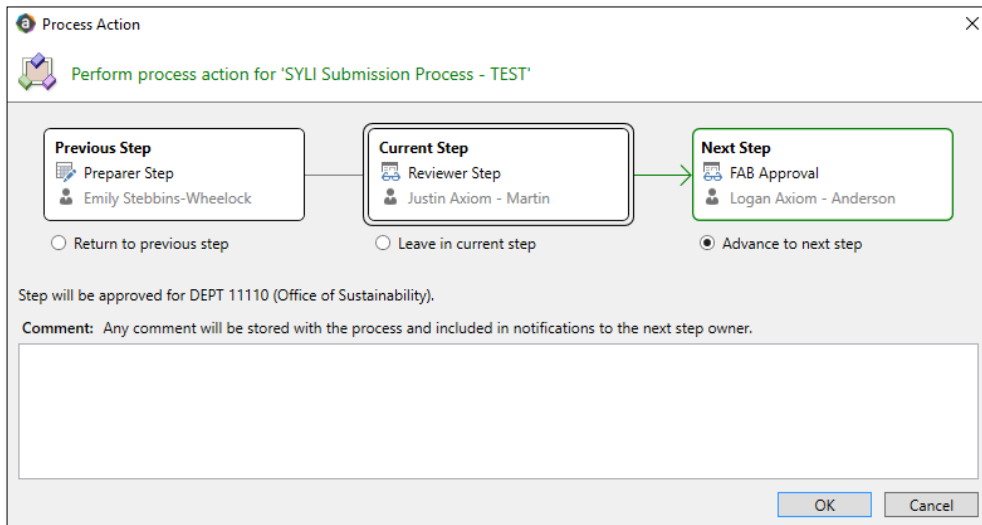
Save the Plan File to open the Process Action pop-up window. Select the desired Process Action by ticking the relevant radio button, as shown in the three screenshots below:

1. Leave in current step (keep the file with you) if you need to continue working with it. This is the default.

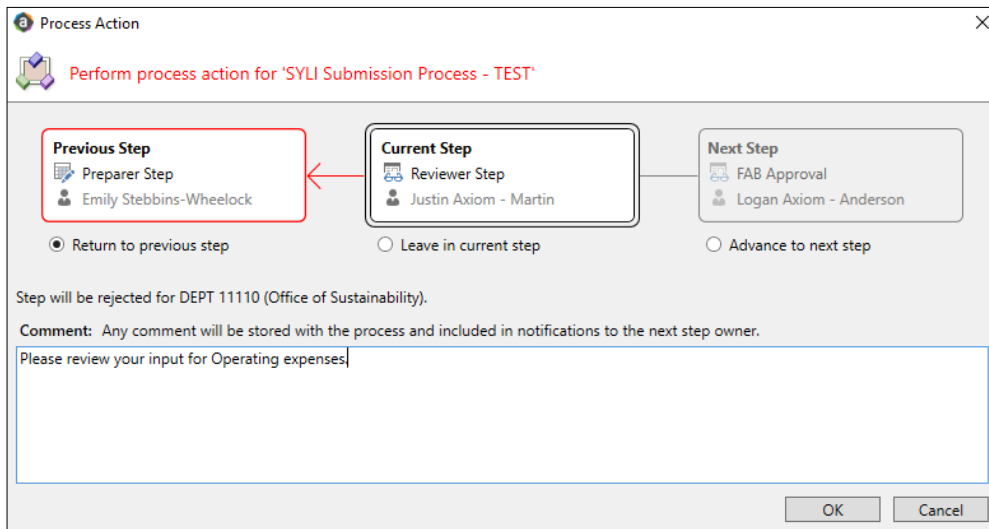




2. Advance to next step to submit the file to FAB for final approval, adding comments if desired.

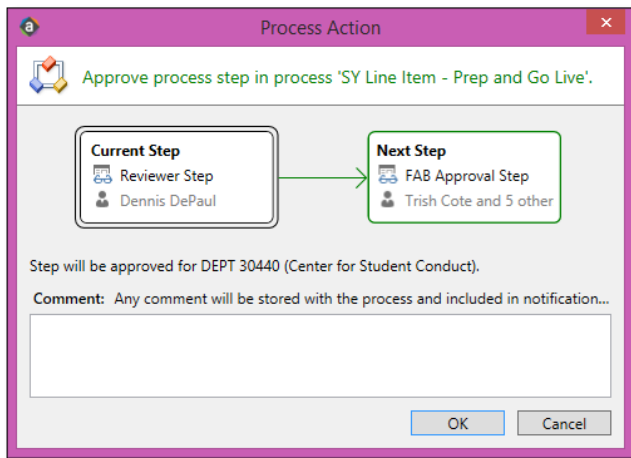
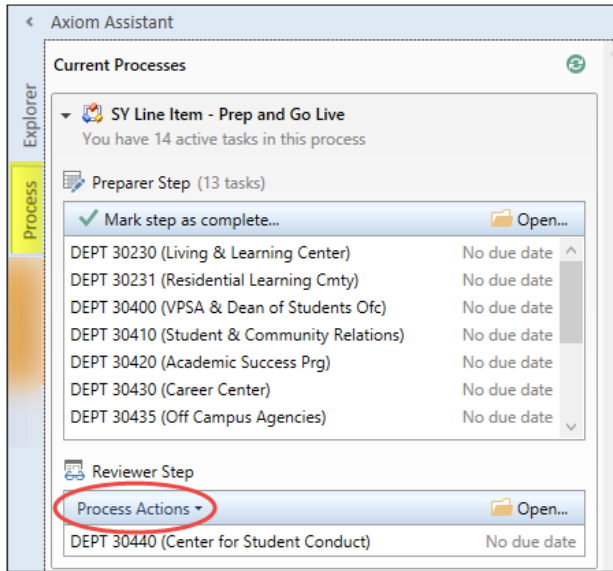


3. Return to previous step to return the file to the Preparer, adding comments if desired.





If you want to move multiple Plan Files between process steps, navigate to Process pane. Click on (1) green check mark if in Preparer Step or (2) Process Actions if Plan File is in Reviewer Step.



When done working in Axiom click the “Close Axiom Software” icon on the Axiom Ribbon.

