Axiom Budget Training
Spring 2019
Agenda

Introductions

Budget Overview

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

Reports

Key Budget Dates

Demos

Where to get help

Appendix
Introductions
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

Data
- Employee load as of April 8
- Plan files are done at the dept level (home dept of employee)
- Employee salary load excludes shift differential

Salary Distributions
- Need to be from 7/01/19 thru 6/30/20
- 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

#### Layout of Plan File
- Alphabetical by employee.
- Contains only employees for whom salary setting using Axiom is appropriate.
- Plan Files do not contain 4 and 5 month terms or Grad with terms less than 12 months or a start date other than 7/1.

#### 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. COL$, COL%, 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>• Activities must net to zero</td>
</tr>
<tr>
<td>• Plan files are done at the dept level</td>
<td>• Budget must be consistent with rate calculation</td>
</tr>
<tr>
<td>• Reflect University Guidelines</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>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Chartstrings</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Only Fund 100 &amp; 150</td>
<td>• Best opportunity for chartstring clean up &amp; additions</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>
</tbody>
</table>
## Single-Year Line Item

### 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 #

### Functionality
- Enter formulas
- Benefits auto-calculated
- 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 24)
Log into Axiom and follow path to Reports Library / SY REPORTS folder.

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

- **5 Error Checks**
  - 1 related to Single-Year Line-Item
  - 4 related to Single-Year Salary

- **4 Diagnostics**
  - 1 related to Single-Year Line-Item
  - 3 related to Single-Year Salary
Log into Axiom and follow path to Reports Library / SY REPORTS folder.

- Run before submitting plan files in Axiom.
- Do not submit to FAB.
- Saving a local copy is recommended.

**Reports**

1. Budget Recap
2. Percent Increase
3. Salary Distribution
Required VP/Dean Budget Certification

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 20xx
Log into Axiom and follow path to Reports Library / SY REPORTS folder.

- FAB distributes targets via Axiom for both Support & Responsibility Centers.
- SC & RC are required to run Target Report within Axiom.
- Do not submit to FAB.
- Saving a local copy is recommended.
Key Budget Dates

- March: I/E Targets to units
- April 8: Axiom opens to end-users
- April 8: General Fund Targets available in Axiom
- April 19: I/E Rate Calculations to FAB
- May 24: Line-Item and Salary budgets submitted via Axiom
Demos
Axiom Training Tools

Axiom Home Page

1. Submit Footprint
   - If unable to resolve a technical issue
   - If you need security access

2. FAB’s website Budget-Building Materials

3. Log-in instructions

4. Salary User Guides & Video Tutorials

5. Line-Item User Guides & Video Tutorials
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.

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.

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.
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
Appendix: Resources Division of Finance Website

https://www.uvm.edu/finance/budgeting

Budgeting by Fund

UVM's total operating budget of approximately $700M is composed of several discrete "funds," each of which represents monies segregated for specific purposes. The University's budgeting parameters and process vary by each of the major fund categories.

Annual Budgeting

- GENERAL FUND (FUND 100)
- RESERVES (FUND 108)
- STUDENT GOVERNMENT FUNDS (FUNDS 130 AND 131)
- INCOME & EXPENSE ACTIVITIES (FUND 156)
- UNRESTRICTED PLANT FUNDS (FUND 200)
- GRANTS & CONTRACTS (FUNDS 300 AND 330)
- RESTRICTED GIFTS & ENDOWMENTS (FUNDS 305, 310, 311, 320, 321, 370, 371)
- AGENCY FUNDS (FUND 900)

BUDGETING BY FUND
- INCENTIVE-BASED BUDGETING
- BUDGETING DATES
- FAB ANALYSES BY UNITS/DEPARTMENTS
- FINANCIAL REPORTING
- REVENUE-GENERATING ACTIVITY GUIDE
  - UVM Budget Book (Detailed Operating Budget)
  - UVM Sourcebook

LOG IN TO AXIOM

REQUEST AXIOM HELP

Forms

User Guides

Training