

Axiom Budget Building Training

Budget Year FY24



The University of Vermont

Agenda

Introductions

Key Budget Dates

Budgeting Activities

- Single Year Salary Planning
- Single Year Line Item Budgeting

Demos

Reports

Where to get help

Budget building tips & best practices

Practice plan files, additional Q&A

Key Budget Dates

- ❑ April 11: IE Rate Calculations due to FAB
- ❑ May 25: **BUDGETS DUE: Line-Item and Salary budgets submitted via Axiom by 3:00 pm**
- ❑ June 9: VP/Dean Budget Certifications Due

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



Single-Year Salary Planning

- Set salaries and distributions for employees in home dept

Data

- Employee load as of March 31
- Plan files are done at the dept level (home dept of employee)
- UE Only - salary load excludes shift differential

Salary Distributions

- Need to be from 7/01/23 thru 6/30/24
- Must equal 100%
- Can use any chartstring regardless of fund
- When using projects confirm start/end dates fall within distribution period

Exception Codes

- Use exception codes when applicable

ePARs (after 3/31)

- Need to be submitted if change in term or FTE
- Need to be submitted for position change

Delete Employee Record (after 3/31)

- **Termination:** If an employee will be terminated by 7/1, remove the employee from Axiom to prevent a new year record in PeopleSoft HCM.
- **Position Change:** If an employee will be in a different position as of 7/1, remove the employee from Axiom and submit a 7/1 ePAR with the new position and salary.
- **Grads:** With future dated termination rows in HCM should be removed. Only grads that stay in Axiom plan files are 12 month grads with no post 7/1 term row existing 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



Single-Year Salary Planning

- Set salaries and distributions for employees in home dept

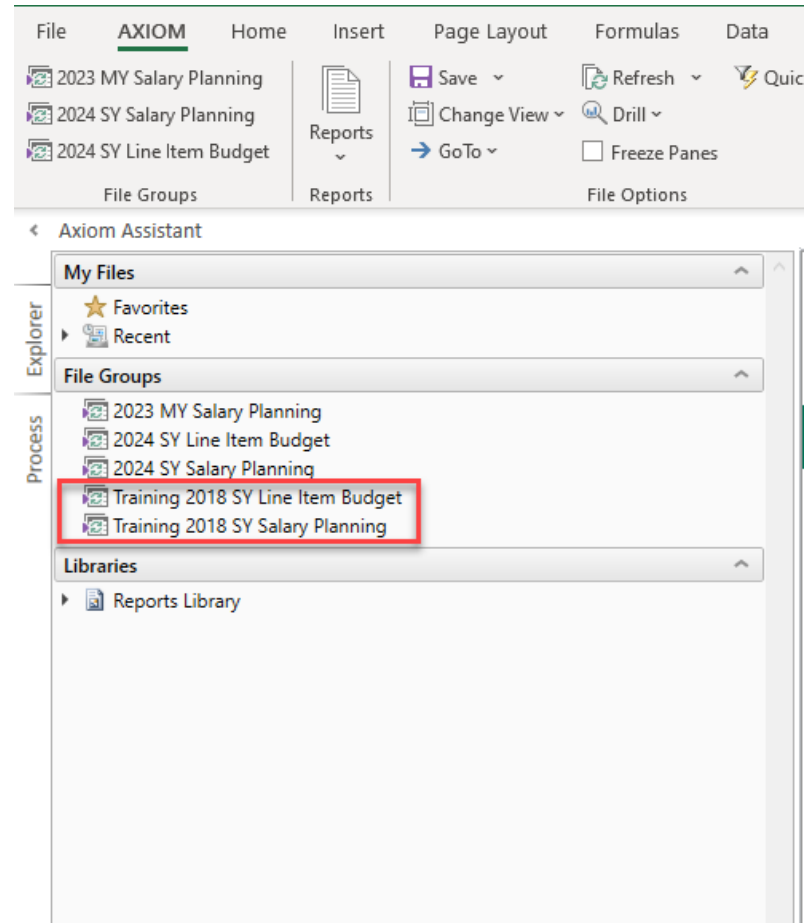
Layout of Plan File

- 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.
- Attach documents.
- Enter formulas.
- Refresh variables to filter plan file by Union Status, Term, Name.
- Enter salary increases by category (i.e. COL%).
- 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.

Demo: SYSP



Single-Year Line Item



Single Year Line Item

- Enter budgets by chartstring for General Fund & Income/Expense

Processes

- VPs & Deans must manage to their target amounts
- Plan files are organized by department

Chartstrings

- Only Fund 100 & 150
- Budget in whole dollars
- Revenue budgets do not have property values

Other

- Best opportunity for chartstring clean up & additions

Income Expense

- Activities must net to zero
- Budget must be consistent with rate calculation
- Significant change to activity requires updated MOU
- Grant charging activities and activities with budgets greater than \$100k must submit a rate calculation electronically to FAB by April 11
- Units complete MOU & Rate Certification Form

Single-Year Line Item



Single Year Line Item

- Enter budgets by chartstring for General Fund & Income/Expense

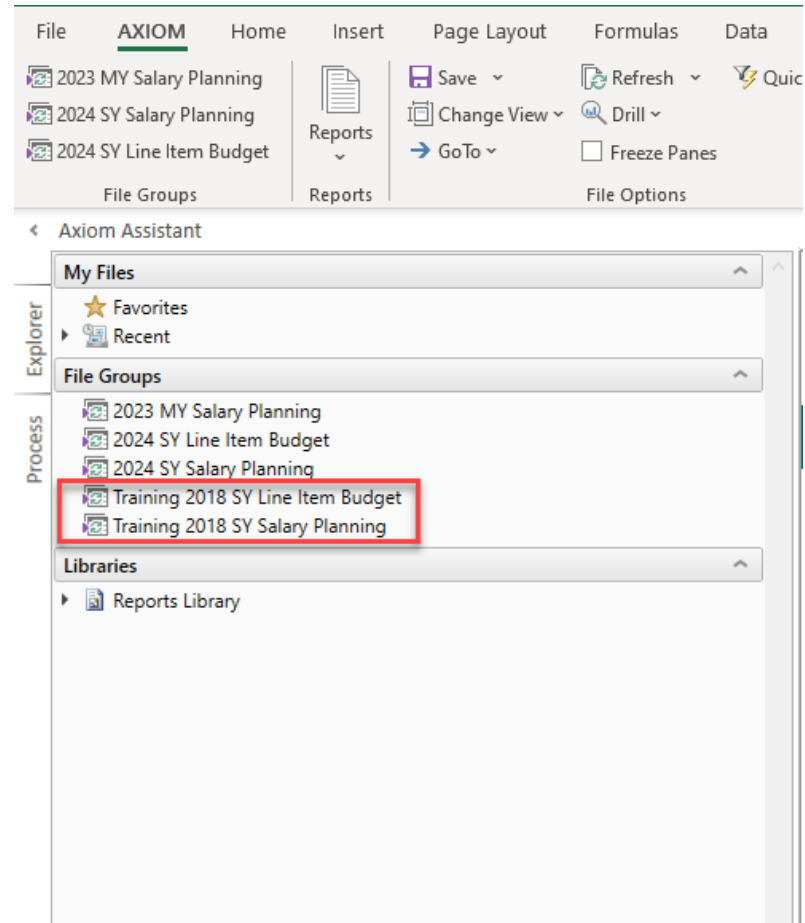
Layout of Plan File

- 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 comments.
- Attach documents.
- 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 IE.
- Chartfield values updated overnight automatically (through May 24).

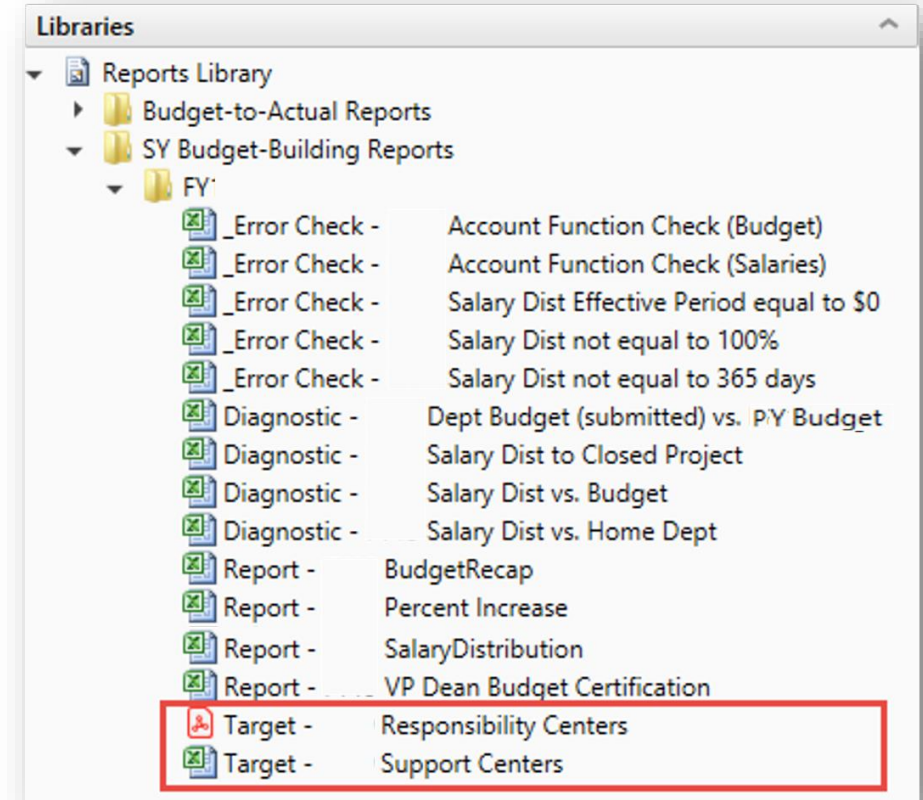
Demo: SYLI



Targets

Available for certain users. Log into Axiom and follow path to Reports Library / SY REPORTS folder.

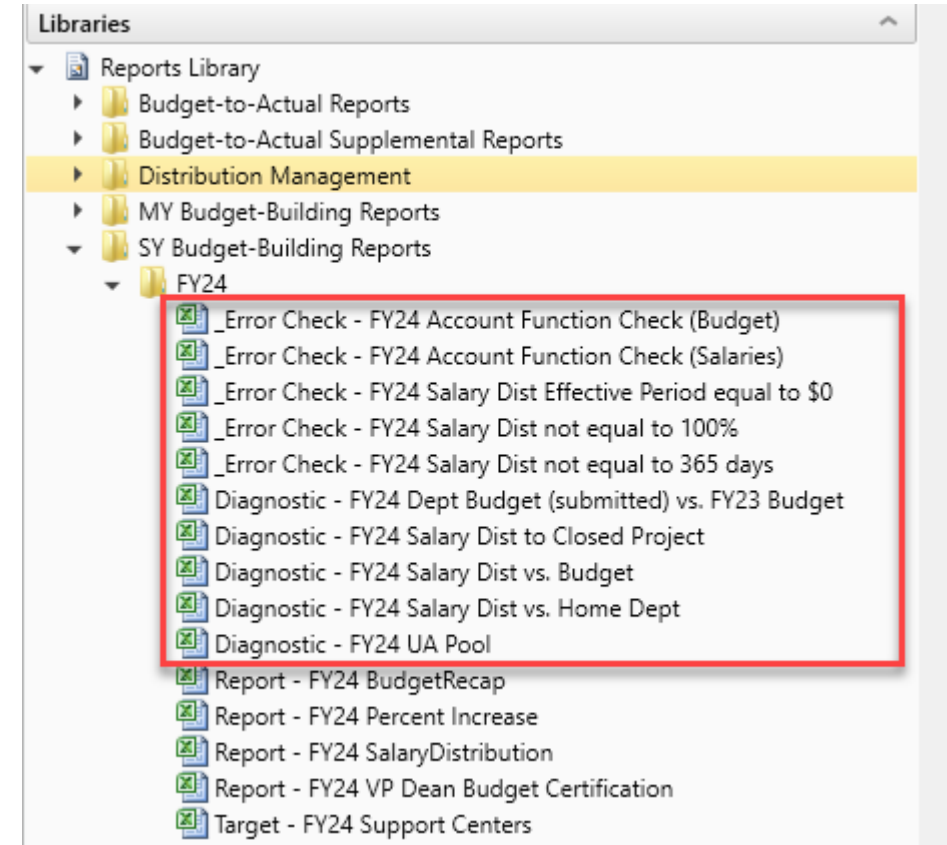
- ❖ FAB distributes targets via Axiom for both Support & Responsibility Centers.
- ❖ SC & RC are required to run Target Report within Axiom.
- ❖ Do not submit to FAB.
- ❖ Saving a local copy is recommended.



Diagnostics & Error Check Tools

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
 - 5 Diagnostics
 - 1 related to Single-Year Line-Item
 - 4 related to Single-Year Salary



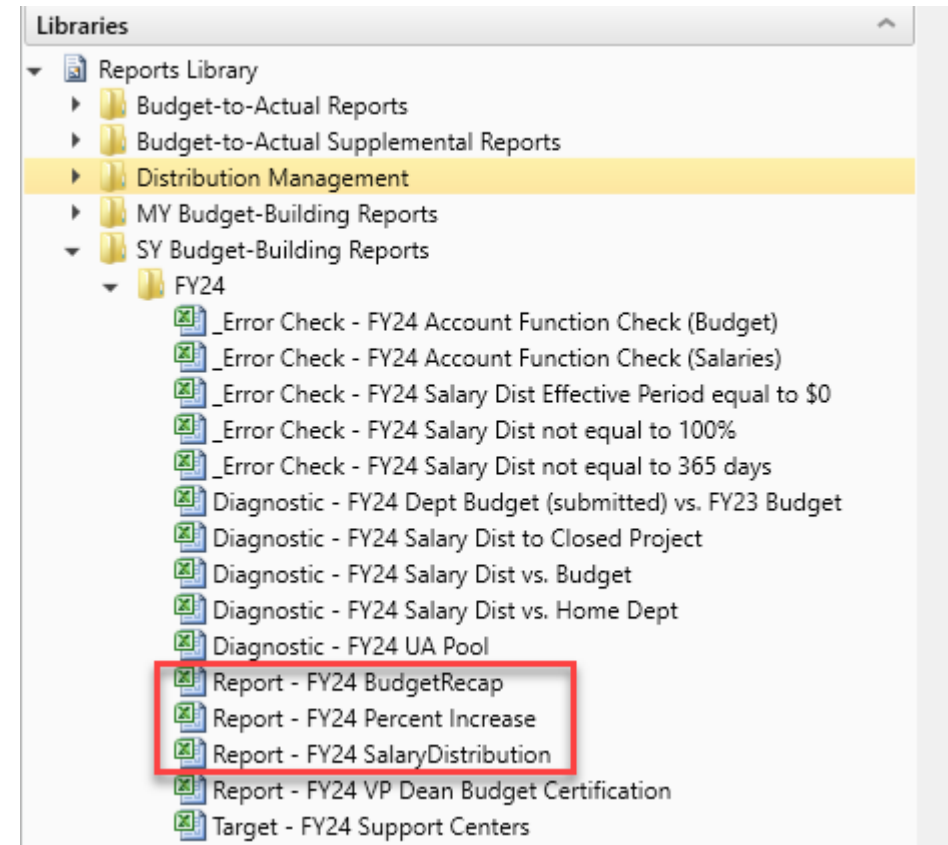
Reports

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

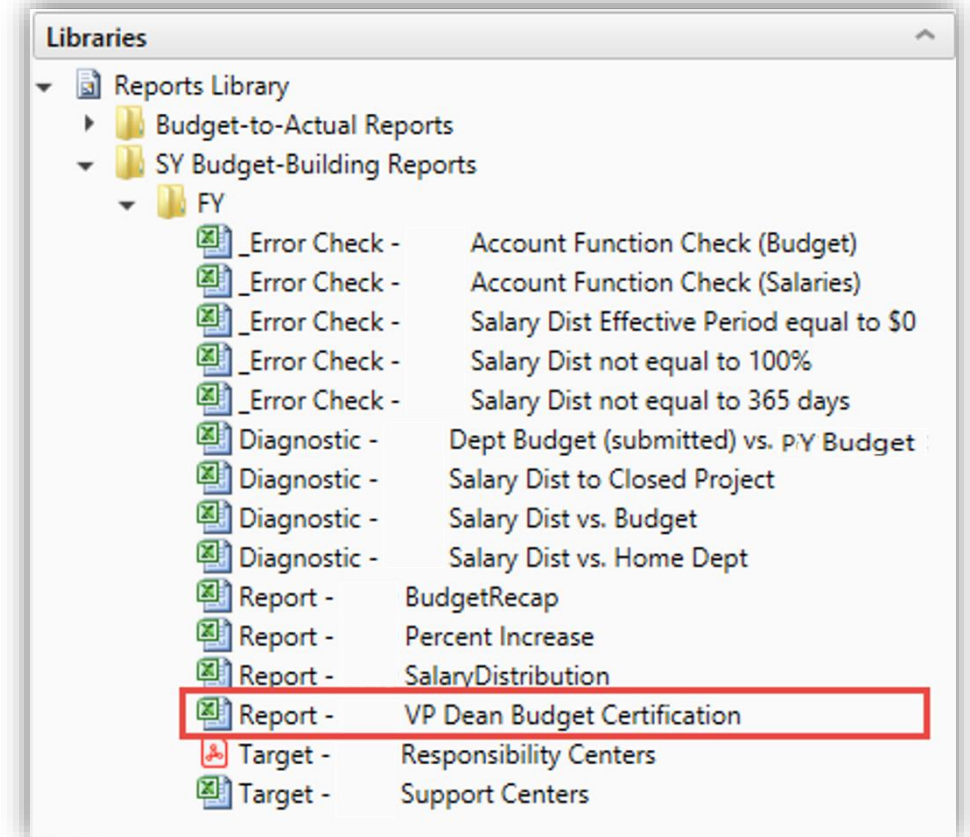
1. Budget Recap
2. Percent Increase
3. Salary Distribution



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 2024*




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

Home x

 The University of Vermont

Axiom Budgeting & Financial Reporting System

Welcome:
Trish Cote

1 [Submit a Footprint / Report an Issue](#)

2 [Financial Analysis & Budgeting website](#)

3 [Log-in instructions](#)

Reporting

- [User Guide](#)
- [Training Presentation](#)
- [Video Tutorial – Introduction \(3:28\)](#)
- [Video Tutorial – Intro to Reporting Functionality \(13:30\)](#)
- [Video Tutorial – Intro to Detail by Fund Report \(11:55\)](#)
- [Video Tutorial – Intro to Summary by Fund Report \(9:00\)](#)
- [Video Tutorial – Intro to All Funds Report \(3:11\)](#)
- [Video Tutorial – Intro to Non-Sponsored Projects Report \(10:17\)](#)

4 **Single-Year Salary Planning**

- [User Guide](#)
- [Training Presentation](#)
- [Video Tutorial - Introduction \(6:00\)](#)
- [Video Tutorial - Salary Increases \(7:05\)](#)
- [Video Tutorial - Salary Distributions \(7:00\)](#)
- [Video Tutorial - Other Functionality \(6:51\)](#)
- [Video Tutorial - Diagnostics & Reports \(10:58\)](#)

5 **Single-Year Line-Item Budgeting**

- [User Guide](#)
- [Training Presentation](#)
- [Video Tutorial - Introduction \(17:16\)](#)
- [Video Tutorial - Diagnostics & Reports \(6:23\)](#)

Appendix: Website Resources

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

MENU

DIVISION OF FINANCE & ADMINISTRATION

Budgeting by Fund

UVM's total operating budget of approximately \$740M 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 150)

UNRESTRICTED PLANT FUNDS (FUND 200)

GRANTS & CONTRACTS (FUNDS 300 AND 330)

RESTRICTED NON-SPONSORED CONTRACTS, GIFTS & ENDOWMENTS (FUNDS 305, 310, 311, 320, 321, 370, 371)

AGENCY FUNDS (FUND 900)

BUDGETING BY FUND

INCENTIVE-BASED BUDGETING

BUDGETING DATES

FAB ANALYSTS BY UNITS/DEPARTMENTS

FINANCIAL REPORTING

REVENUE-GENERATING ACTIVITY GUIDE

• [UVM Budget Book \(Detailed Operating Budget\)](#)

• [UVM Sourcebook](#)

LOG IN TO AXIOM

REQUEST AXIOM HELP

[Axiom Log-in instructions \(PDF\)](#)

Forms

User Guides/Training

[Contact the Financial Analysis & Budgeting Office](#)

Appendix: Website Resources

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

INCOME & EXPENSE ACTIVITIES (FUND 150) ^

An income/expense activity is a self-supporting activity that is designed to generate sufficient revenue from the sale of specific goods and/or services to recover expenses associated with providing those goods or services. These activities are sometimes called "auxiliary enterprises."

Budget Materials

- [Income/Expense Guidelines \(PDF\)](#)
- [Income/Expense Budget Template \(Excel\)](#)
- [MOU & Rate Certification Form \(Word\)](#)
- [Archived Income/Expense guidelines from prior years](#)

References

- [Income/Expense Matrix \(PDF\)](#)
- [Income/Expense Manual \(PDF\)](#)
- [Guide to Setting up a Revenue-Generating Activity](#)
- [Cost Principles](#)

Forms

- [Proposal to Establish an Income/Expense Activity \(PDF\)](#)
- [EZ-IE Proposal Form \(PDF\)](#)
- [Memorandum of Understanding Template \(Word\)](#)

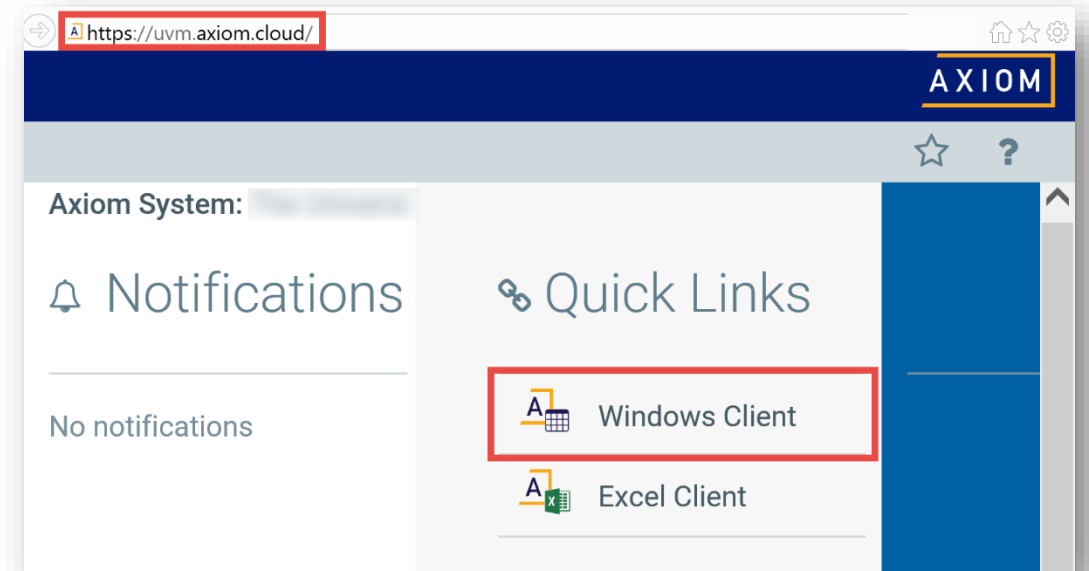
CONTACT FINANCIAL ANALYSIS & BUDGETING



Appendix: Log-In Instructions

Click here for detailed Log-In Instructions --> https://www.uvm.edu/sites/default/files/Division-of-Finance/UserGuides/Axiom_log_in_instructions.pdf

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. Follow web browser-specific steps
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

The screenshot displays the Axiom Budgeting & Financial Reporting System interface. The top menu bar includes 'File', 'AXIOM', and 'Home'. Below this, a toolbar contains various icons for file operations (Save, Refresh, Quick Filter, Print, Snapshot, E-mail), display settings (Show Home, Formula Bar, Headings), and help/exit functions. The left sidebar features an 'Explorer' pane with 'My Files' (Favorites, Recent), 'File Groups' (2023 MY Salary Planning, 2024 SY Line Item Budget, 2024 SY Salary Planning, Training 2018 SY Line Item Budget, Training 2018 SY Salary Planning), and 'Libraries' (Reports Library). The main content area shows the 'The University of Vermont' logo and the title 'Axiom Budgeting & Financial Reporting System'. Below this, a 'Welcome:' section is followed by links to 'Submit a Footprint / Report an Issue', 'Financial Analysis & Budgeting website', and 'Log-in instructions'. The right side of the interface is divided into three columns of links: 'Reporting' (User Guide, Training Presentation, Video Tutorial - Introduction (3:28), Video Tutorial - Intro to Reporting Functionality (13:30), Video Tutorial - Intro to Detail by Fund Report (11:55), Video Tutorial - Intro to Summary by Fund Report (9:00), Video Tutorial - Intro to All Funds Report (3:11), Video Tutorial - Intro to Non-Sponsored Projects Report (10:17)), 'Single-Year Salary Planning' (User Guide, Training Presentation, Video Tutorial - Introduction (6:00), Video Tutorial - Salary Increases (7:05), Video Tutorial - Salary Distributions (7:00), Video Tutorial - Other Functionality (6:51), Video Tutorial - Diagnostics & Reports (10:58)), and 'Single-Year Line-Item Budgeting' (User Guide, Training Presentation, Video Tutorial - Introduction (17:16), Video Tutorial - Diagnostics & Reports (6:23)).

File AXIOM Home

2023 MY Salary Planning
2024 SY Salary Planning
2024 SY Line Item Budget
File Groups

Save
Change View
GoTo
Reports

Refresh
Drill
File Options

Quick Filter

Print
Snapshot
E-mail
File Output

Show Home
Formula Bar
Headings
Display

Help
Help

Close Axiom Software
Exit

Axiom Assistant

Home X

My Files
Favorites
Recent

File Groups
2023 MY Salary Planning
2024 SY Line Item Budget
2024 SY Salary Planning
Training 2018 SY Line Item Budget
Training 2018 SY Salary Planning

Libraries
Reports Library

The University of Vermont

Axiom Budgeting & Financial Reporting System

Welcome:

[Submit a Footprint / Report an Issue](#)

[Financial Analysis & Budgeting website](#)

[Log-in instructions](#)

Reporting

- [User Guide](#)
- [Training Presentation](#)
- [Video Tutorial – Introduction \(3:28\)](#)
- [Video Tutorial – Intro to Reporting Functionality \(13:30\)](#)
- [Video Tutorial – Intro to Detail by Fund Report \(11:55\)](#)
- [Video Tutorial – Intro to Summary by Fund Report \(9:00\)](#)
- [Video Tutorial – Intro to All Funds Report \(3:11\)](#)
- [Video Tutorial - Intro to Non-Sponsored Projects Report \(10:17\)](#)

Single-Year Salary Planning

- [User Guide](#)
- [Training Presentation](#)
- [Video Tutorial - Introduction \(6:00\)](#)
- [Video Tutorial - Salary Increases \(7:05\)](#)
- [Video Tutorial - Salary Distributions \(7:00\)](#)
- [Video Tutorial - Other Functionality \(6:51\)](#)
- [Video Tutorial - Diagnostics & Reports \(10:58\)](#)

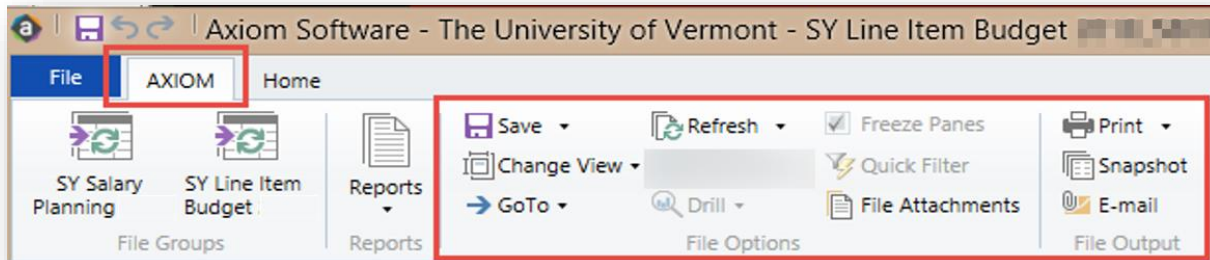
Single-Year Line-Item Budgeting

- [User Guide](#)
- [Training Presentation](#)
- [Video Tutorial - Introduction \(17:16\)](#)
- [Video Tutorial - Diagnostics & Reports \(6:23\)](#)

Multi-Year Salary Planning

- [User Guide](#)
- [Position Number Management Guide](#)
- [Training Presentation](#)
- [Video Tutorial - Introduction \(18:05\)](#)

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.

Training Tips

Below applies to both Salary and Line Item Budgeting



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.
- Save and close the plan file before shutting down. This will help avoid lockouts.

Appendix: Training Tips

Below applies to both Salary and Line Item Budgeting



MANTRA - SAVE AND SAVE OFTEN

- When working in SYSP and SYLI to prevent loss of work from save data error messages SAVE AND SAVE OFTEN. Do not enter a significant amount of work and then save the Plan File. Save often after entering data as you work in the Plan File.
- After editing existing chartstring(s) SAVE the Plan File before adding new or deleting rows.
- After adding new charstrings(s) or effective period SAVE the plan file again prior to deleting any records in the newly added rows.
- Add one effective period at a time, and save the Plan File again after adding the new effective period BEFORE deleting any rows in the newly added section. The rationale for this is the original save to populate a new chartstring or effective period for viewing in the Plan File did not yet save them to the data tables. The system cannot delete data that does not yet exist in the data tables hence end user will receive a data save error message preventing saving of the Plan File.

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.
- Before you use Refresh Variable, save any work you have entered. Refresh Variable does not save plan file; if you use this before saving your work 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.



Hints and Tips

Training Tips: SY Salary, Complex Distributions



Salary Distribution			3 % Distributed 88.25%	Salary Distributed 32,238.18									
Copy/Delete	2 Start Date	End Date	% Dist	\$ Distribution	Account	OU	Dept	Fund	Source	Function	Project	Program	Purpose
	7/1/2017	12/31/2017	100.000%	18,265.26									
	7/1/2017	12/31/2017	50.000%	9,132.63	52000	15	55610	100	100005	412	032404	0601	0000
	7/1/2017	12/31/2017	43.400%	7,927.12	52000	15	55700	300	201002	411	032404	0601	0000
	7/1/2017	12/31/2017	6.600%	1,205.51	52000	15	55700	300	201002	411	032401	0601	0000
			<<Add Chart String>>										
	1/1/2018	3/31/2018	4 53.000%	4,840.29									
X	1/1/2018	3/31/2018	47.000%	-	52000	15	55610	100	100005	412	032404	0601	0000
	1/1/2018	3/31/2018	53.000%	4,840.29	52000	15	55700	300	201002	411	032404	0601	0000
			<<Add Chart String>>										
C	4/1/2018	6/30/2018	6 100.000%	9,132.63									
C	4/1/2018	6/30/2018	47.000%	4,292.34	52000	15	55610	100	100005	412	032404	0601	0000
C	4/1/2018	6/30/2018	53.000%	4,840.29	52000	15	55700	300	201002	411	032404	0601	0000
			<<Add Chart String>>										

1. Chartfield values can be modified by double-clicking in the chartfield value and selecting the new value from the available options in the pop-up.
2. The Start Date for the first effective date range will be defaulted to 7/01/20XX. The final End Date is defaulted to 6/30/20XX (regardless of the term of the employee).
3. The distribution for each effective date and the full year (7/01-6/30) must total 100%.
4. Distributions that are not equal to 100% will display as a red error. In the example above, a line is flagged for deletion and the remaining chartstring does not equal 100%. Once it is modified to = 100%, the red flag will disappear.
5. To Delete a Chartstring, select "X" from the dropdown box. You may delete an entire effective dated range of chartstrings by selecting "X" on the top row of the distribution block to the left of Start Date. The rows will delete upon Save.
6. To create a new effective date range, copy an entire block of chartstrings down by selecting "C" in the top row of the distribution(s) (cell left of Start Date) you want to copy. Upon Save, a new, copied block will be inserted below the selected effective date range. The new block Start Date will default to 1 day later than the previous Start Date. You will need to adjust the Start date as desired, and the End Date for the previous date range will adjust automatically.
7. To Add a Chartstring(s) to a distribution, double-click <<Add Chart String>>. A new chartstring will be inserted, auto-populated with the chartfield values of the last chartstring on the distribution. Double-click in the blue chartfield value cells to select new values as needed and populate the % distributed. You may add more than one row at a time, then edit new row values.

Training Tips: SY Salary, Complex Distributions (cont'd)



Salary Distribution			3	% Distributed	Salary Distributed									
				88.250%	32,238.18									
Copy/Delete	2	Start Date	End Date	% Dist	\$ Distribution	Account	OU	Dept	Fund	Source	Function	Project	Program	Purpose
		7/1/2017	12/31/2017	100.000%	18,265.26									
		7/1/2017	12/31/2017	50.000%	9,132.63	52000	15	55610	100	100005	412	032404	0601	0000
		7/1/2017	12/31/2017	43.400%	7,927.12	52000	15	55700	300	201002	411	032404	0601	0000
		7/1/2017	12/31/2017	6.600%	1,205.51	52000	15	55700	300	201002	411	032401	0601	0000
				<<Add Chart String>>										
		1/1/2018	3/31/2018	4	53.000%	4,840.29								
X	5	1/1/2018	3/31/2018	47.000%	-	52000	15	55610	100	100005	412	032404	0601	0000
		1/1/2018	3/31/2018	53.000%	4,840.29	52000	15	55700	300	201002	411	032404	0601	0000
				<<Add Chart String>>										
C	6	4/1/2018	6/30/2018	7	100.000%	9,132.63								
C		4/1/2018	6/30/2018	47.000%	4,292.34	52000	15	55610	100	100005	412	032404	0601	0000
C		4/1/2018	6/30/2018	53.000%	4,840.29	52000	15	55700	300	201002	411	032404	0601	0000
				<<Add Chart String>>										

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. When you change chartstring value(s) in any of the new rows, the chartfield values of any subsequent new rows below it will also change to mirror the changed chartstring.

The following steps 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.
3. **SAVE AND SAVE OFTEN.** If you add a new CS or effective period and try to delete a row in the newly added lines, you may encounter a save data error. To prevent this situation, save the Plan File again after adding the new CS or effective period BEFORE deleting any rows in the newly added section.

Training Tips: SY Line Item, Adding Chartstrings

Hints and Tips

The screenshot displays the 'Budget Input Form' for 'The University of Vermont'. It shows a table of existing line items with columns for Level, Acct, OU, Fund Source, Funct, Prog, Purp, Prop, and CY. A red circle '1' highlights the '<<Add Chart String>>' link at the bottom of the E4101 account. A red circle '2' highlights the 'Insert' dialog box where the number of items to insert is entered. A red circle '3' highlights a new line item added to the table, which has a 'Matches existing' label. A red circle '4' highlights the 'Choose Value' dropdown menu, which lists various program codes and descriptions.

Level	Acct	OU	Fund Source	Funct	Prog	Purp	Prop	CY
E4101	Fee Rev - Program & Event Fees							
Delete Line								
E4101		01	100	100001	109	0707	0000	NA
E4101		01	100	100001	109	0709	0000	NA
E4101		01	150	130146	107	0000	0000	NA
<<Add Chart String>>								
E4110	Fee Rev - Athletics							
Delete Line								
E4110								
E4110								
E4110								
E4110								

Insert dialog box: Enter the number of items to insert. [Input field with '2'] [OK] [Cancel]

Choose Value dropdown menu: 0000 (Unspecified Program), 0059 (Adm-Marketing Team), 0101 (Central Programs), 0102 (SR Advisory-ST Initiatives), 0103 (Distinguished Lecturers), 0104 (Administrative Svcs Prgrm), 0105 (Vermont Partnerships), 0106 (Racial Diversity), 0107 (Vermont Tech Council), 0108 (Cultural Diversity), 0109 (Diversity Leadership Series). Showing 921 values. [OK] [Cancel]

Table of existing line items (E6000):

Level	Acct	OU	Fund Source	Funct	Prog	Purp	Prop	CY
E6000	Other Operating & Services							
Delete Line								
E6000		01	100	100001	521	0000	0000	500
E6000		01	100	100001	521	0000	0000	500

Matches existing label: Matches existing

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.
5. **SAVE AND SAVE OFTEN.** 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.

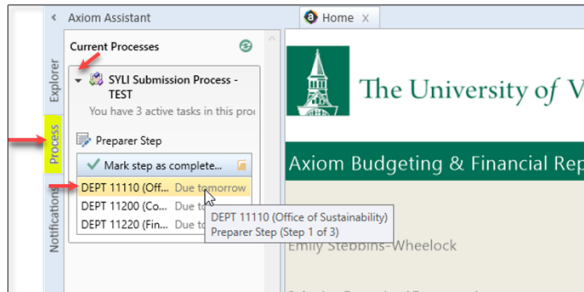
Training Tips: SY Line Item, Add a New E-Level

Hints and Tips

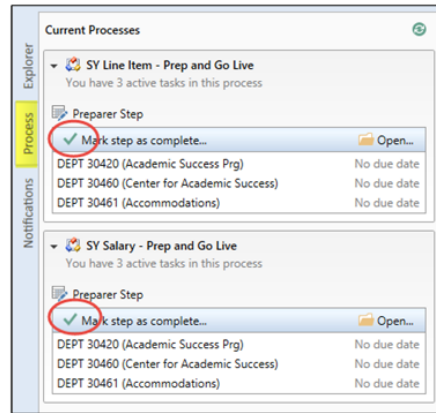
	<<Add Chart String>>	
2	Exxxx New E Level	-
	Delete Line	
	Exxxx	-
	<<Add Chart String>>	
1	<<Add New E-Level>>	
	DBENF Benefits	No Benefit Input Allowed - Not Fully Calculated Until "SAVE"

1. 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>>.
2. 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.
3. **SAVE AND SAVE OFTEN.**

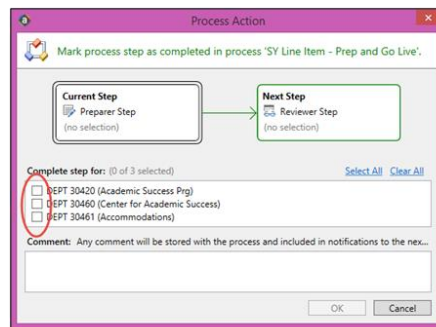
Training Tips: Saving Multiple Plan Files



1. 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.



2. When you log into Axiom, you will see a list of the files assigned to you as a Preparer in the left-hand Process pane.



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

Don't forget....

- ☐ **May 25:** **BUDGETS DUE: Line-Item and Salary budgets submitted via Axiom by 3:00 pm**
- ☐ **June 9:** **VP/Dean Budget Certifications Due**

—
Thanks.
—



The University of Vermont