

# Axiom Budget Building Training Budget Year FY25



The University of Vermont

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# 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 12: IE Rate Calculations due to FAB
- ☐ May 22: **BUDGETS DUE: Line-Item and Salary budgets submitted to FAB via Axiom by 3:00 pm**
- ☐ June 7: 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 April 1
- 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 7/01/24 thru 6/30/25
- 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 4/1)

- 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.
- **Individuals with future dated rows in HCM should be removed.** Run PeopleSoft HCM query *UV\_ACTIVE\_JOBS\_WITH\_FUTURE\_ROW* with eff. date 7/1 to identify individuals with future dated rows.

### Kronos

- Employees paid through KRONOS salary distributions as of April 1, 2024 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

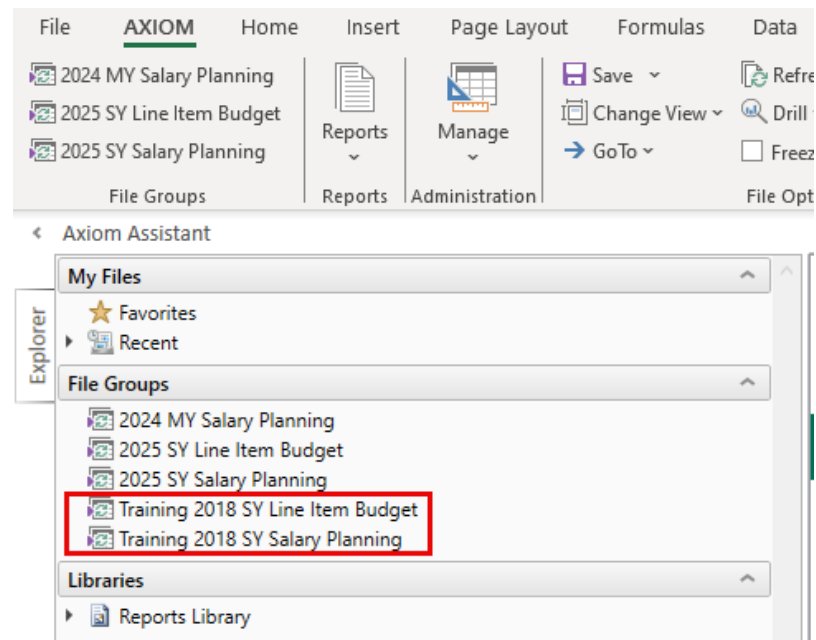
### Layout of Plan File

- 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 employees.

# 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 12
- Units complete MOU & Rate Certification Form



# Single-Year Line Item



## Single Year Line Item

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

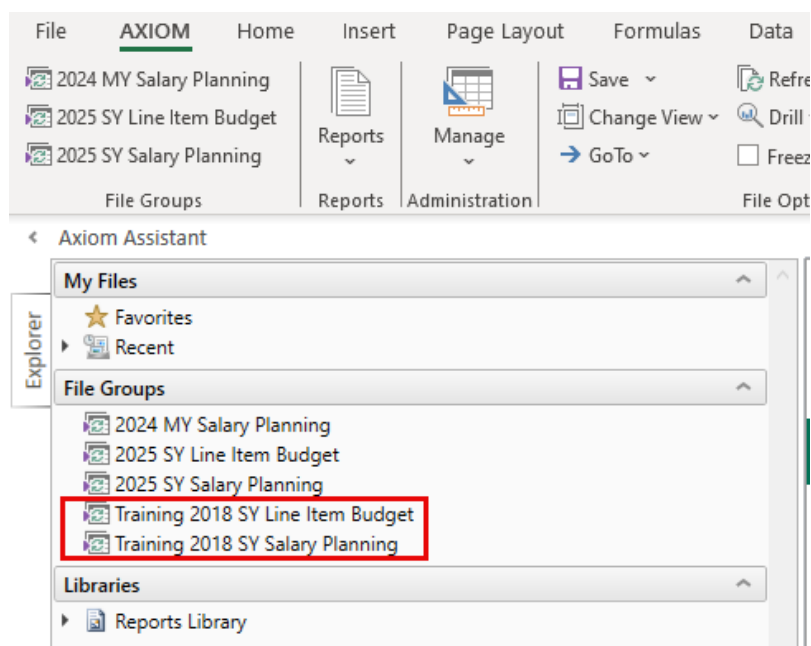
### Layout of Plan File

- 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 21).

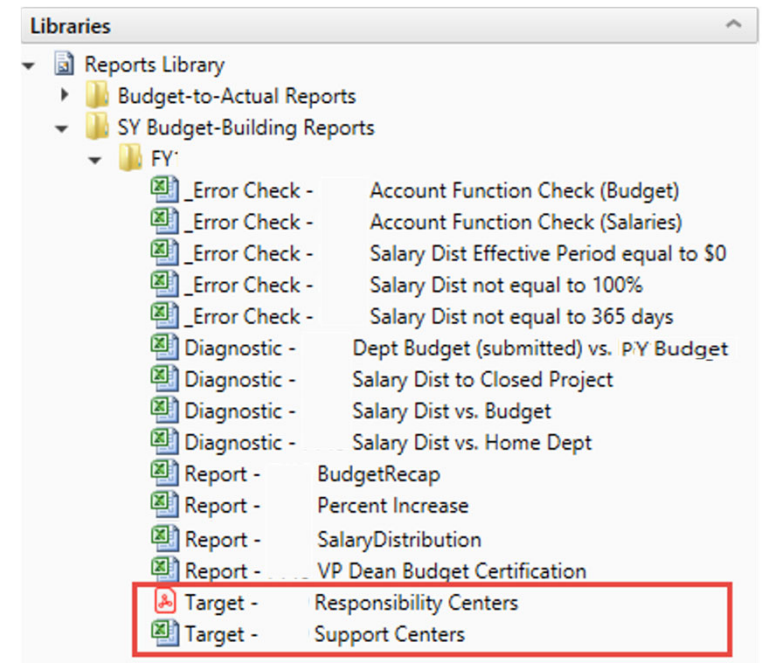
# Demo: SYLI



# 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.

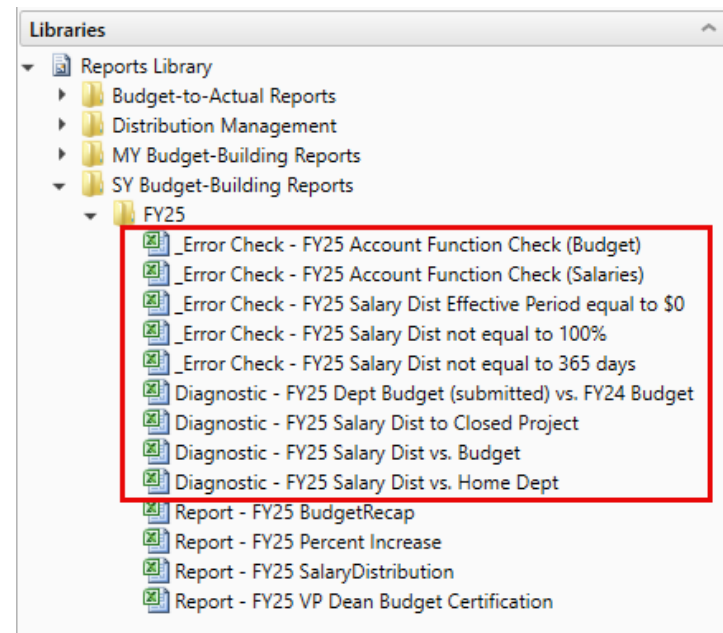
- ❖ Run before submitting plan files in Axiom.
- ❖ Do not submit to FAB.

## ➤ 5 Error Checks

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

## ➤ 4 Diagnostics

- 1 related to Single-Year Line-Item
- 3 related to Single-Year Salary



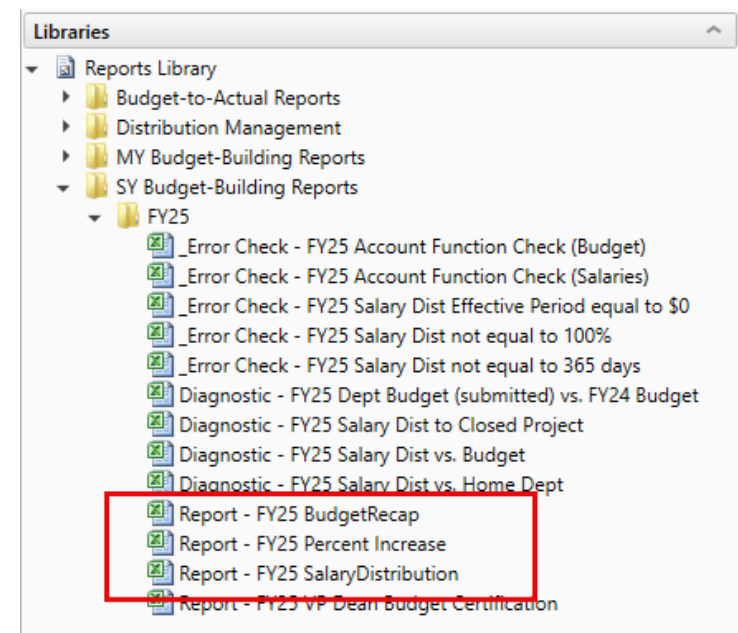
# Reports

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

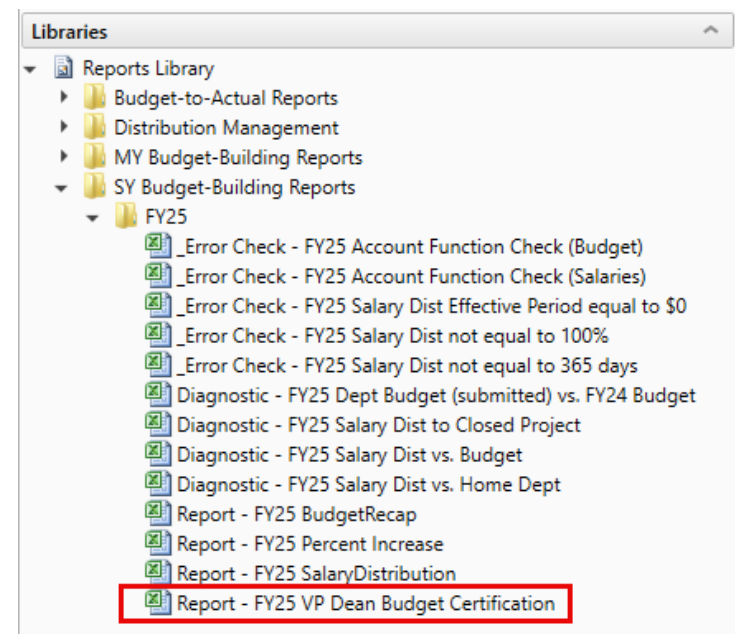
1. Budget Recap
2. Percent Increase
3. Salary Distribution



# 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 2025*




# 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 \(11:55\)](#)
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- [Video Tutorial – Intro to All Funds Report \(3:11\)](#)
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**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 \(10:58\)](#)

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**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](#)



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RESERVES (FUND 108) ▾

STUDENT GOVERNMENT FUNDS (FUNDS 130 AND 131) ▾

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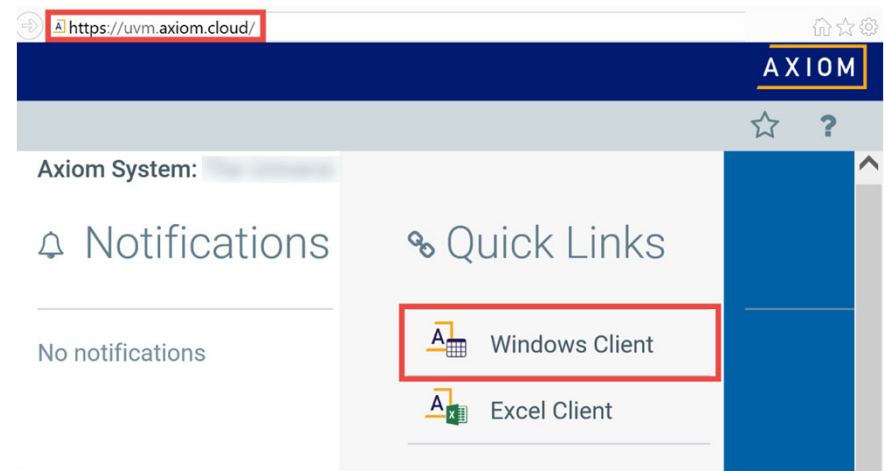
RESTRICTED NON-SPONSORED CONTRACTS, GIFTS & ENDOWMENTS (FUNDS 305, 310, 311, 320, 321, 370, 371) ▾

AGENCY FUNDS (FUND 900) ▾

# 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](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

File AXIOM Home Insert Page Layout Formulas Data Review View Automate Developer Help Acrobat

2025 SY Line Item Budget 2025 SY Salary Planning Reports Administration Save Refresh Quick Filter Print Show Home Formula Bar Headings Help Close Axiom Software Exit

File Groups Reports Administration File Options File Output Display Help Exit

Axiom Assistant Home x

My Files

Favorites Recent

File Groups

2025 SY Line Item Budget 2025 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:

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[Financial Analysis & Budgeting website](#)

[Log-in instructions](#)

**FY25 budget building plan files are live! Plan files must be submitted to FAB by Wednesday 5/22, 3 p.m.**

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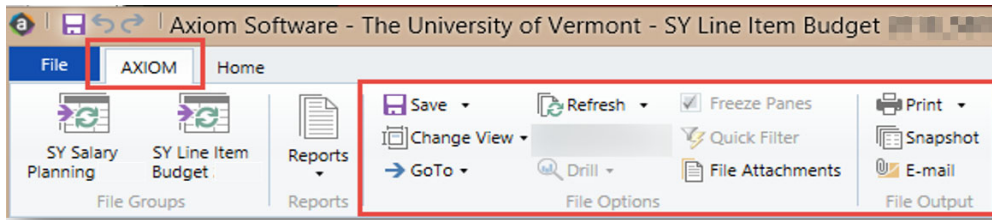
**Single-Year Line-Item Budgeting**

- [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 chartstrings(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.

## Training Tips: SY Salary, Complex Distributions



Salary Distribution				3	% Distributed	Salary Distributed										
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	012404	0601	0000	
		7/1/2017	12/31/2017		43.400%	7,927.12	52000	15	55700	300	201002	411	012404	0601	0000	
		7/1/2017	12/31/2017		6.600%	1,205.51	52000	15	55700	300	201002	411	012401	0601	0000	
					<<Add Chart String>>											
X	5	1/1/2018	3/31/2018	4	53.00%	4,840.29										
		1/1/2018	3/31/2018		47.000%	-	52000	15	55610	100	100005	412	012404	0601	0000	
		1/1/2018	3/31/2018		53.000%	4,840.29	52000	15	55700	300	201002	411	012404	0601	0000	
					<<Add Chart String>>											
C	6	4/1/2018	6/30/2018		100.000%	9,132.63										
C		4/1/2018	6/30/2018		47.000%	4,292.34	52000	15	55610	100	100005	412	012404	0601	0000	
C		4/1/2018	6/30/2018		53.000%	4,840.29	52000	15	55700	300	201002	411	012404	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 18.326%	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	53.800%	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		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



The left screenshot shows the 'Budget Input Form' with a table of E-Level accounts. 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 user enters the number of items to insert.

The right screenshot shows the same interface with a red circle '3' highlighting a new chartstring line added below E4101. A red circle '4' highlights a 'Choose Value' dialog box that appears when a chartfield value is double-clicked, showing a list of existing values to select from. A red arrow points from the dialog box to the 'Matches existing' label in the table.

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.

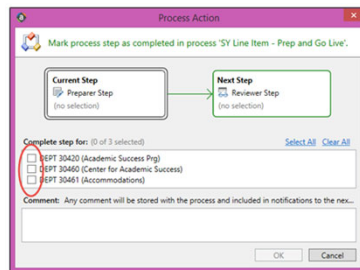
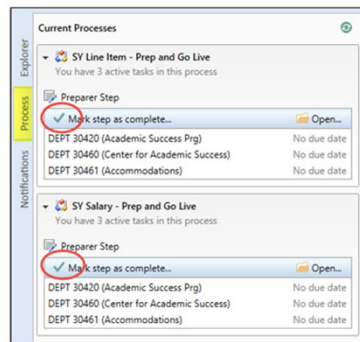
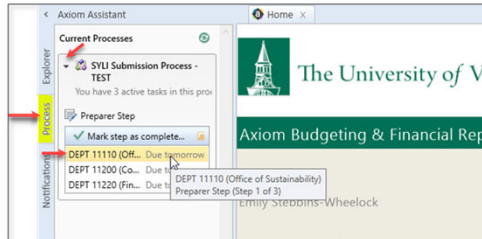
## Training Tips: SY Line Item, Add a New E-Level



<<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 22:** **BUDGETS DUE: Line-Item and Salary budgets submitted via Axiom by 3:00 pm**
- ☐ **June 7:** **VP/Dean Budget Certifications Due**

—  
**Thanks.**  
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The University of Vermont