

Axiom Multi-Year Salary Planning



The University of Vermont

Agenda

Introductions

Overview of process changes & annual planning timeline

New position management guidelines

Axiom Multi-Year Salary Planning functionality

Help & Resources

Appendix



— Introductions —

Why a new process?

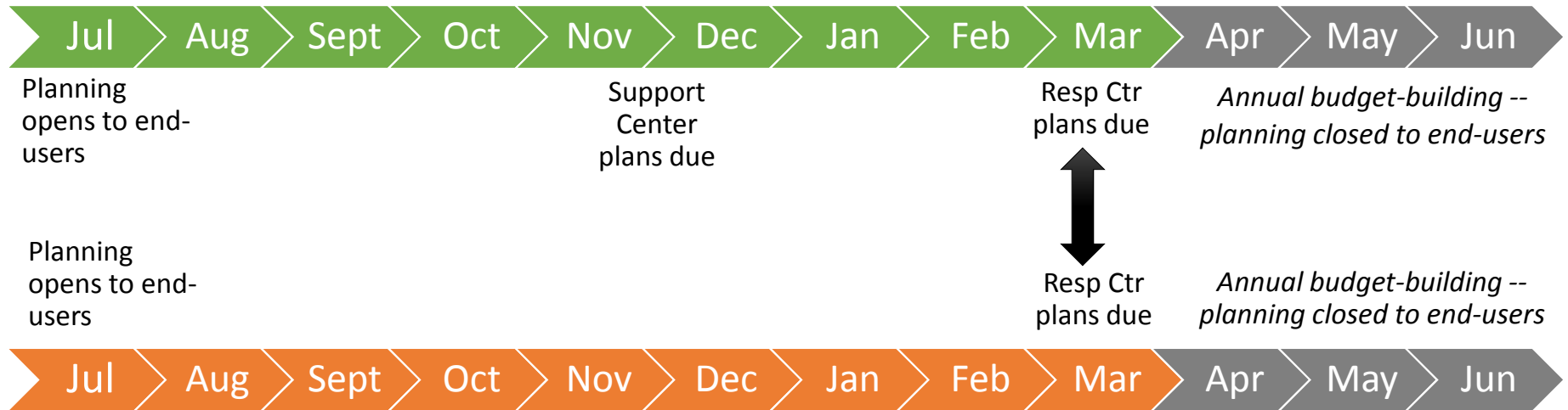
1. Previous position management process did not meet units' needs in an incentive-based budgeting (IBB) environment
2. FAB Administrative Unit Review recommended that units be responsible for position management
3. Support for PeopleSoft EPM (including Position Allocation Module) ended Spring 2017

Process Changes – 30,000-ft View

	Old Process		New Process
Source system for position data	EPM Position Allocation Module	➔	PeopleSoft HCM
Planning tool	PAM/Roster + unit shadow systems	➔	Axiom MY Salary Planning
Timeline	Fall/Spring PAM updates Faculty review in Feb Staff review in March	➔	Continual planning/position updates Cost Center plans submitted in Nov/Dec Resp. Center plans submitted in Mar
Units' role/responsibility	Update PAM 3x / year	➔	Submit MY Salary Plan to FAB 1x/year RCs: Align MY Salary Plan to MY Budget
FAB's role/responsibility	Review all recruitments Monitor plans 3x/year	➔	Review only TT faculty recruitments Monitor plans annually
HR's & Payroll Services' role/responsibility	Maintain employee/job data	➔	Maintain employee/job data Support units in maintaining position data

Annual Multi-Year Planning Cycle

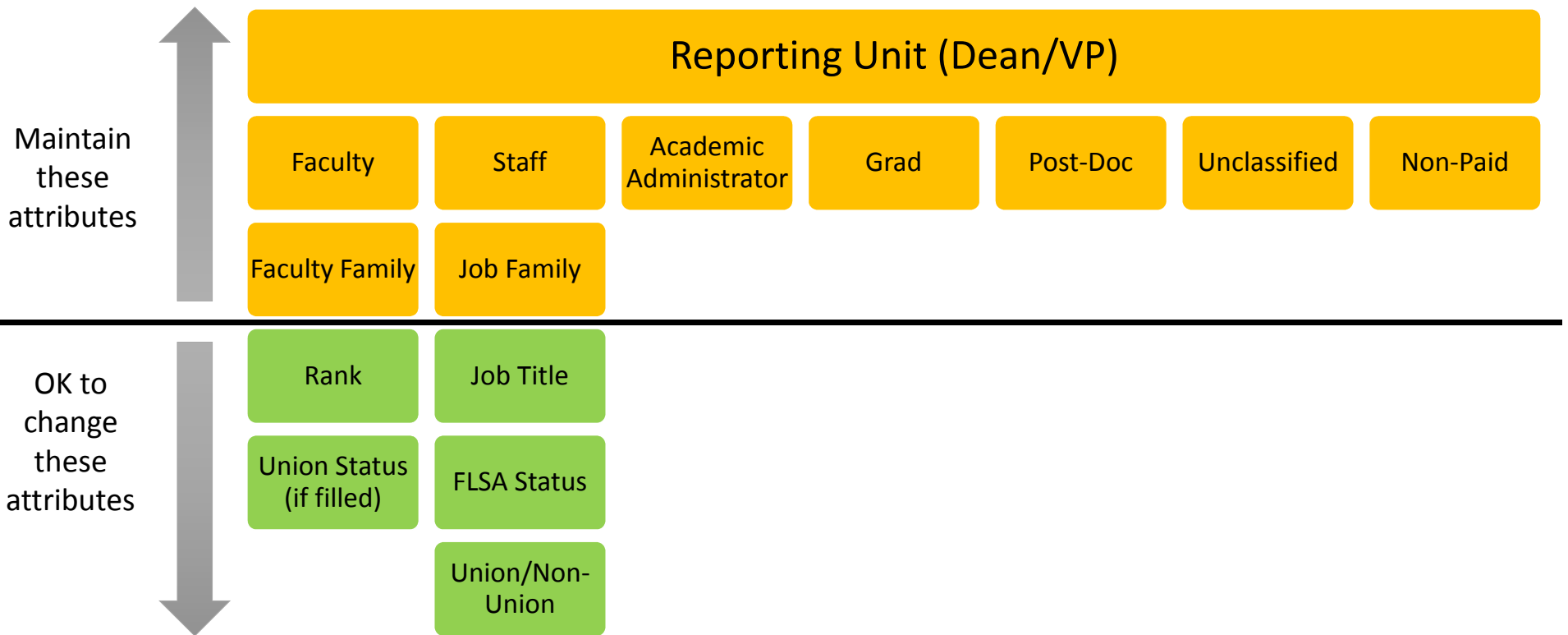
MY Salary Planning



Position Management Guidelines

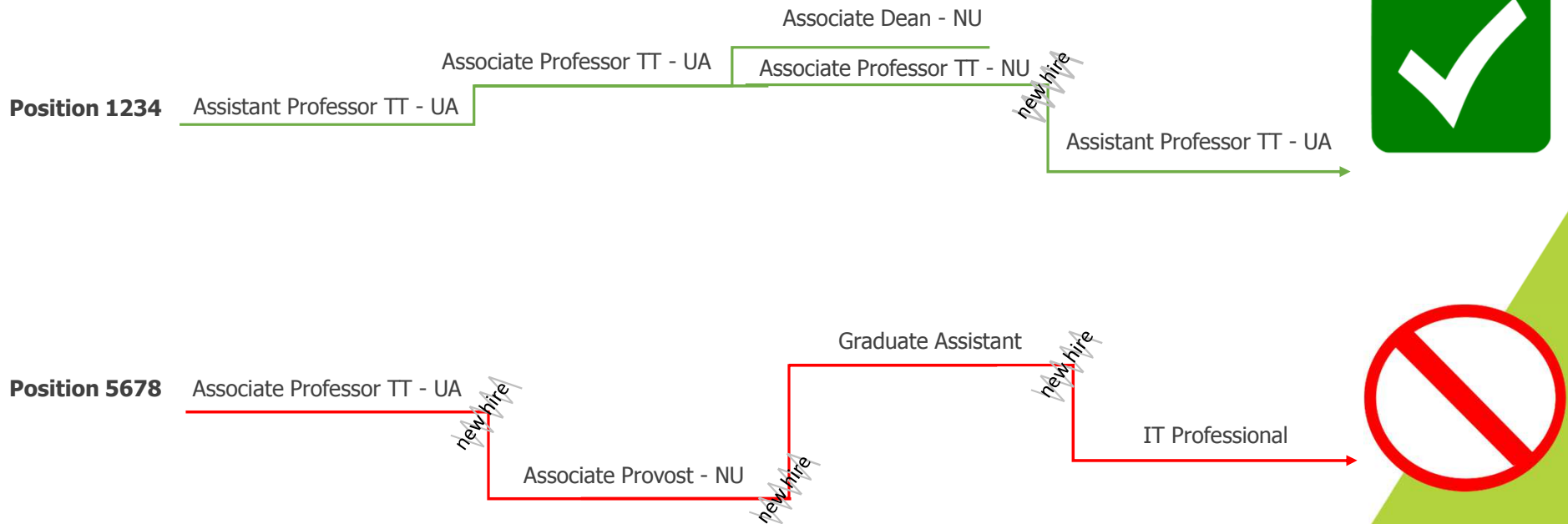
- PeopleSoft HCM is the basis for the positions that appear in your Axiom multi-year salary plan
- Important to maintain the integrity and currency of your position data in HCM:
 - Reuse/reactivate vacant positions as appropriate
 - Create new positions if necessary
 - Inactivate vacant positions you don't plan to fill

Reusing a Position vs Creating New



Position Management Guidelines

Maintain position continuity over time



Position Creation & Reactivation

Employee Type	Process	Resource for Units to Identify Existing Positions	How to Indicate New Position No. Needed	How to Indicate Position Reactivation Needed	Who Will Create or Reactivate Position
Full-time faculty	PeopleAdmin recruitment/waiver	UV_POSITION_INCUMBENT query	Action type = Recruitment/Waiver-New Position	Action type = Recruitment/Waiver-Existing Position	HR Faculty Services Facultyservices@uvm.edu
Classified staff					HR Class & Comp Theresa.Gookin@uvm.edu
Graduate students	ePAR	Active positions will appear in ePAR search; inactive positions will not UV_POSITION_INCUMBENT query	Leave position # blank, note in comments that new position should be created	Note in comments that position needs to be reactivated	Payroll Services Payroll@uvm.edu
Pre/Post-doc fellows					
Post-doc associates					
Part-time faculty	PeopleAdmin and/or ePAR per Guide to Salaried NTT Faculty on Payroll	UV_POSITION_INCUMBENT query	In PeopleAdmin, Action type = Recruitment/Waiver-New Position In ePAR, leave position # blank, note in comments that new position should be created	In PeopleAdmin, Action type = Recruitment/Waiver-Existing Position In ePAR, note in comments that position needs to be reactivated	HR Faculty Services facultyservices@uvm.edu
Unclassified staff	PeopleAdmin recruitment/waiver	UV_POSITION_INCUMBENT query	Action type = Recruitment/Waiver-New Position	Action type = Recruitment/Waiver-Existing Position	TBD
NPCs	PeopleAdmin and/or ePAR, depending on title	UV_POSITION_INCUMBENT query	In PeopleAdmin, Action type = Recruitment/Waiver-New Position In ePAR, leave position # blank, note in comments that new position should be created	In PeopleAdmin, Action type = Recruitment/Waiver-Existing Position In ePAR, note in comments that position needs to be reactivated	HR Class & Comp, HR Faculty Services, or Payroll Services, depending on title

Position Inactivation

- Annual process to review and inactivate any vacant full-time faculty, staff, post-doc, and 12-month grad positions you don't plan to fill and no longer want to plan/budget for
- Use UV_POSITION_VACANT query to review all vacant positions within a dept
- Initial clean-up prior to Axiom MY Salary rollout
- Annual timing hereafter TBD

Multi-Year Salary Planning Parameters

Plan Files

- One plan file per Reporting Unit (Dean- or VP-led unit)
- Positions appear in the plan files based on the home dept of the position

Positions

- All active positions
- Vacant grad assistant/advisor positions not displayed

Employees

- Full-time faculty, full-time staff, 12-mo grad students, post-docs are included
- Part-time faculty, grads <12 months, temps, student & work-study employees, and appointments with \$0 salaries are excluded

Monthly Data Refresh

- Employee/position data refreshed from HCM monthly
- Future-year planning data will be retained (not overwritten)

Funding Distributions

- Based on Fund and Home Dept of position
- Based on most future effective dated distribution of the current fiscal year (i.e., the distribution as of 6/30)

Data Integrations

- No data from MY Salary Planning is ever saved back to PeopleSoft HCM – future-year planning data is stored only in Axiom
- You may choose to send your next-year planned salary increases from Axiom MY planning to SY planning

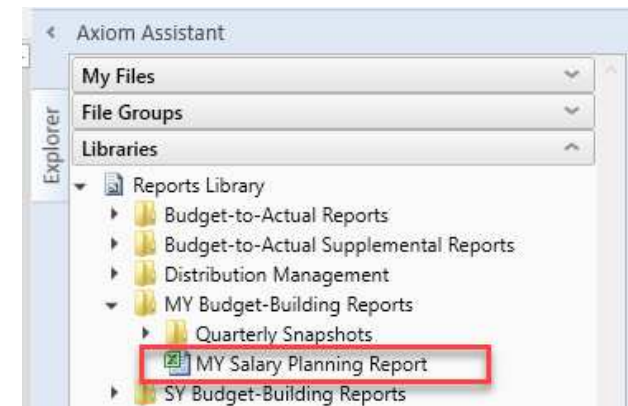
Report & Quarterly Snapshots

MY Salary Planning Report

- Available in Axiom Reports Library / MY Budget-Building Reports folder
- Run by Reporting Unit
- Expand row 22 to see breakdown of planned expense by E-level
- Filtering by any column value will be reflected in row 22-51 summary
- Colleges and Schools may use the Report to prepare their annual staffing plan for the Provost's Office

Quarterly Snapshots

- Jul, Oct, Jan, Mar snapshots
- Saved in Axiom Reports Library for historical reference





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Demo
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Help & Resources

Help

For Axiom support or budgeting questions → submit an Axiom Footprint or contact your FAB analyst

For position management questions → contact Mary Brodsky, Human Resource Services

For faculty & unclassified staff position creation/reactivation questions → contact HR Faculty Services

For classified staff position creation/reactivation questions → contact HR Class & Comp

For graduate and post-doc position creation/reactivation questions → contact Payroll Services

Resources

On the Axiom home page and FAB's website:

1. User Guide
2. Training presentation
3. Link to Footprints
 - If unable to resolve a technical issue
 - If you need security access

The University of Vermont

Axiom Budgeting & Financial Reporting System

Welcome:
Emily Stebbins-Wheelock

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

[Financial Analysis & Budgeting website](#)

[Log-in instructions](#)

Announcements

- [Multi-Year Salary Trainings 11/8 and 11/16](#) - email cindy.lee@uvm.edu to sign up

Reporting

- [User Guide](#)
- [Training Presentation](#)

Multi-Year Salary Planning

- [User Guide](#)
- [Training Presentation](#)

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 \(10:58\)](#)

Appendix: Tips & Reminders



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.

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.

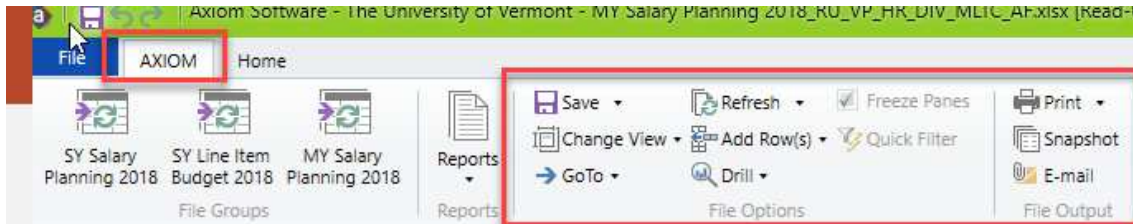
Functionality

- After 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.

Refresh Variable

- Refresh Variable does not save plan file. Before you use Refresh Variable, save any work you have entered. Otherwise it will be lost.

Appendix: Plan File Functionality



Save

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

Change View

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

GoTo

Use the "GoTo" dropdown to go immediately to the Employee (filled), Vacant, or New Employee section of the plan file.

Refresh

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

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.