Axiom Multi-Year Salary Planning
Agenda

Introductions
Why a new process & annual planning timeline
New position management guidelines
Axiom Multi-Year Salary Planning functionality
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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
Annual Multi-Year Planning Cycle

**MY Salary Planning**

- **Jul**: MY Salary Plan Files open to end-users.
- **Aug**: Support Center plans due.
- **Sept**: MY Salary Plan Files closed to end-users.
- **Oct**: Resp Ctr plans due.
- **Nov** - **Jun**: Various planning periods with specific milestones.
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

Maintain these attributes

- Faculty
- Staff
- Academic Administrator
- Grad
- Post-Doc
- Unclassified
- Non-Paid

Faculty Family
Job Family

OK to change these attributes

- Rank
- Job Title
- Union Status (if filled)
- FLSA Status
- Union/Non-Union

Reporting Unit (Dean/VP)
Position Management Guidelines

Maintain position continuity over time

Position 1234
- Assistant Professor TT - UA

Position 5678
- Associate Professor TT - UA
  - Associate Provost - NU
  - Graduate Assistant

- Associate Dean - NU
  - Associate Professor TT - NU
  - Assistant Professor TT - NU
  - Assistant Professor TT - UA
  - IT Professional
# Position Creation & Reactivation

<table>
<thead>
<tr>
<th>Employee Type</th>
<th>Process</th>
<th>Resource for Units to Identify Existing Positions</th>
<th>How to Indicate New Position No. Needed</th>
<th>How to Indicate Position Reactivation Needed</th>
<th>Who Will Create or Reactivate Position</th>
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<tbody>
<tr>
<td>Full-time faculty</td>
<td>PeopleAdmin recruitment/waiver</td>
<td>UV_POSITION_INCUMBENT query</td>
<td>Action type = Recruitment/Waiver-New Position</td>
<td>Action type = Recruitment/Waiver-Existing Position</td>
<td>HR Faculty Services</td>
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<td>Active positions will appear in ePAR search; inactive positions will not</td>
<td>Leave position # blank, note in comments that new position should be created</td>
<td>Note in comments that position needs to be reactivated</td>
<td>Payroll Services</td>
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<tr>
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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
MY Salary Planning Report
- Available in Axiom Reports Library / MY Budget-Building Reports folder
- Run by Reporting Unit
- Expand rows 22-54 to see breakdown of planned expense by E-level
- Filtering by any column value will be reflected in summary rows
- Colleges and Schools may use the Report to prepare their annual staffing plan for the Provost’s Office

Quarterly Snapshots
- Aug, Oct, Jan, Mar snapshots
- Saved in Axiom Reports Library for historical reference
Help & Resources

Help
For Axiom support or budgeting questions → submit an Axiom Footprint or contact your FAB analyst
For position management questions → contact Human Resources
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
# 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.

**Functionality**
- Save your progress often.
- Save Error Messages will point out any issues in data entry.
- Additional Salary Plans: when deleting from this section, if the system shows a save data error, close out of the plan file. Upon reopening the plan file the deleted row will no longer show.

**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.

**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.