Axiom Multi-Year Salary Planning
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

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

**MY Salary Planning**

- **Jul** Planning opens to end-users
- **Aug** Support Center plans due
- **Sept** Resp Ctr plans due
- **Oct** Annual budget-building -- planning closed to end-users
- **Nov** Annual budget-building -- planning closed to end-users
- **Dec**
- **Jan**
- **Feb**
- **Mar**
- **Apr**
- **May**
- **Jun**

**MY Budget 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

Maintain these attributes:
- Faculty
- Faculty Family
- Staff
- Job Family
- Academic Administrator
- Grad
- Post-Doc
- Unclassified
- Non-Paid

OK to change these attributes:
- Rank
- Job Title
- Union Status (if filled)
- FLSA Status
- Union/Non-Union
Position Management Guidelines

Maintain position continuity over time

Position 1234
- Assistant Professor TT - UA

Position 5678
- Associate Professor TT - UA
- Graduate Assistant
- IT Professional

Associate Provost - NU
- Associate Professor TT - NU
- Associate Dean - NU
- Assistant Professor TT - UA
## 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>
</tr>
</thead>
<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>
</tr>
<tr>
<td>Classified staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Payroll Services</td>
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<td></td>
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</tr>
<tr>
<td>Graduate students</td>
<td>ePAR</td>
<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>
</tr>
<tr>
<td>Pre/Post-doc fellows</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Post-doc associates</td>
<td>PeopleAdmin and/or ePAR per</td>
<td>UV_POSITION_INCUMBENT query</td>
<td>In PeopleAdmin, Action type = Recruitment/Waiver-New Position</td>
<td>In PeopleAdmin, Action type = Recruitment/Waiver-Existing Position</td>
<td>HR Faculty Services</td>
</tr>
<tr>
<td></td>
<td>Guide to Salaried NTT Faculty on Payroll</td>
<td></td>
<td>In ePAR, leave position # blank, note in comments that new position should be created</td>
<td>In ePAR, note in comments that position needs to be reactivated</td>
<td></td>
</tr>
<tr>
<td>Part-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>
</tr>
<tr>
<td>Unclassified staff</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>Payroll Services</td>
</tr>
<tr>
<td></td>
<td></td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>NPCs</td>
<td>PeopleAdmin and/or ePAR, depending on title</td>
<td>UV_POSITION_INCUMBENT query</td>
<td>In PeopleAdmin, Action type = Recruitment/Waiver-New Position</td>
<td>In PeopleAdmin, Action type = Recruitment/Waiver-Existing Position</td>
<td>HR Class &amp; Comp, HR Faculty Services, or Payroll Services, depending on title</td>
</tr>
</tbody>
</table>
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
Demo
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
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 predefined 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.