Axiom Multi-Year Salary Planning

The University of Vermont

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
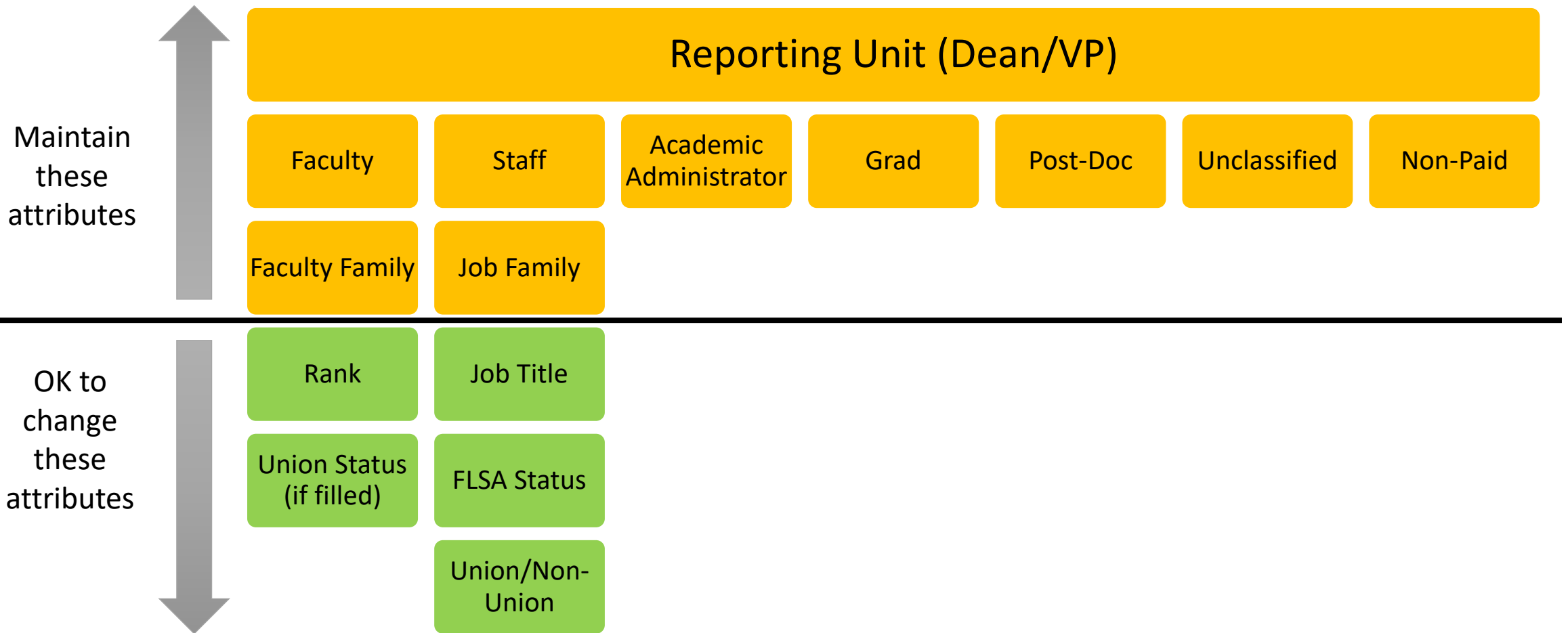
Annual Multi-Year Planning Cycle

MY Salary Planning

| Jul | Aug | Sept | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun |

MY Salary Plan Files open to end-users.

Support Center plans due

Resp Ctr plans due

MY Salary Plan Files closed to end-users.
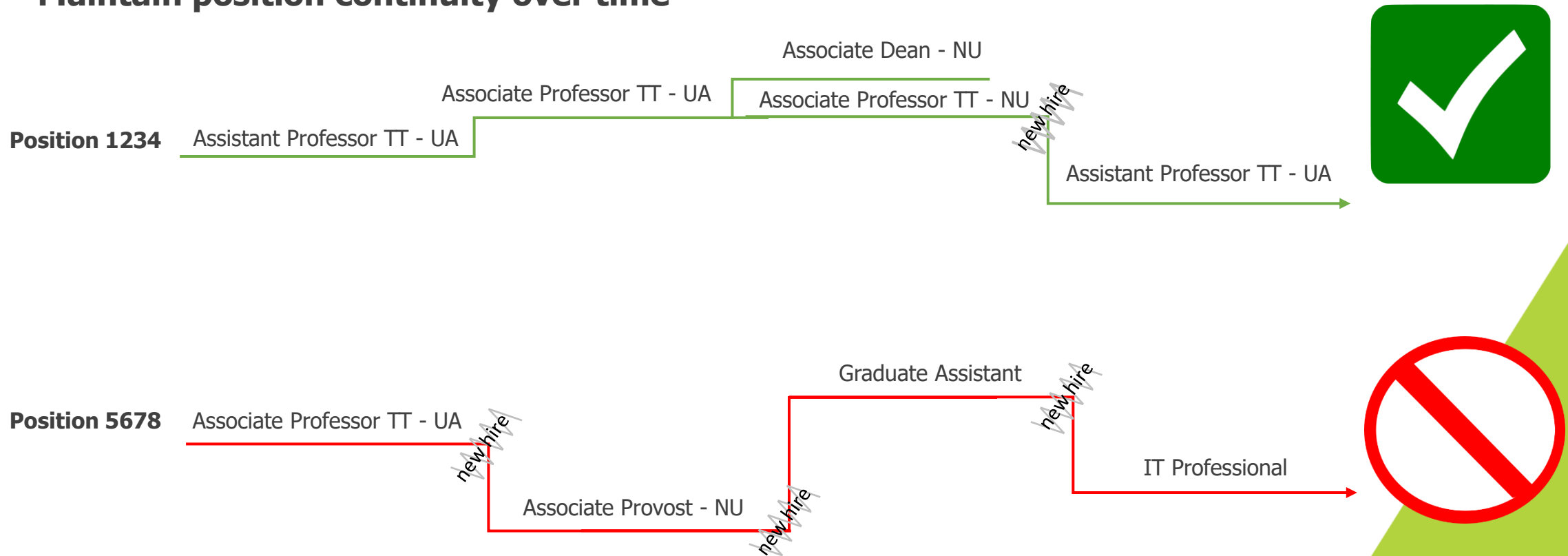
Position Management Guidelines

- 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 ↑

Reporting Unit (Dean/VP)						
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

Position Management Guidelines

Maintain position continuity over time

Position 1234

Assistant Professor TT - UA

Associate Professor TT - UA

Associate Dean - NU

Associate Professor TT - NU

new hire

Assistant Professor TT - UA

Position 5678

Associate Professor TT - UA

new hire

Associate Provost - NU

new hire

Graduate Assistant

new hire

IT Professional

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 HRInfo@uvm.edu
Graduate students	ePAR	Active positions will appear in ePAR search; inactive positions will not	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		UV_POSITION_INCUMBENT query			
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 | HR Class & Comp HRInfo@uvm.edu |
| 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 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
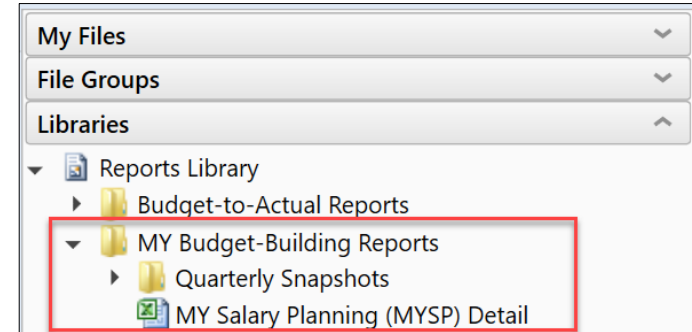
Quarterly Snapshots

- Aug, Oct, Jan, Mar snapshots

- Saved in Axiom Reports Library for historical reference

Demo

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

Hints and Tips

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

- 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.

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
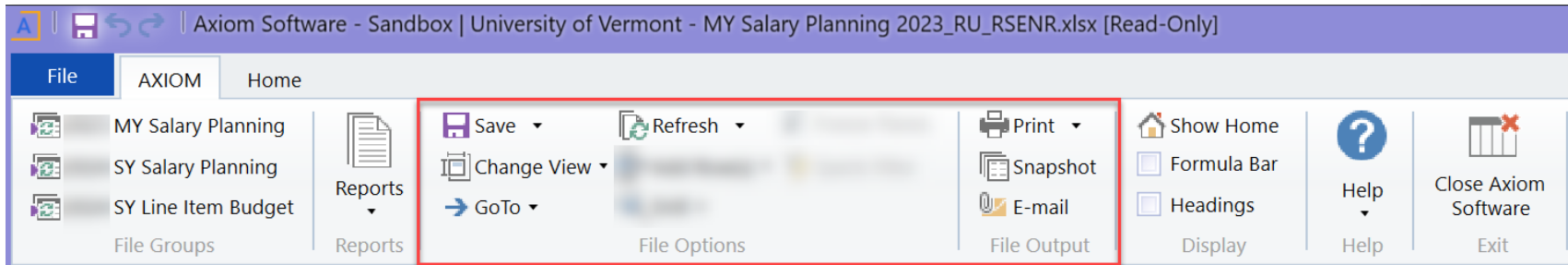
Save

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.