Agenda

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Why Axiom for Reporting?

Provides a suite of financial reports that:

- Are usable across multiple levels of the organization:
  - Reports are ready for Sr Mgt consumption but also usable by budget managers on a daily basis
- Enable users to easily drill down or roll-up financial reports with one user interface
- Provide data across almost all Funds*
- Are consistent across the entire University
- Easily auditable back to PeopleSoft

* Excluding Fund 300 (Sponsored Projects)
Reports

- Enhancement to PeopleSoft reports
- Replacement for Office of Operational Excellence’s Excel reports for Gift & Endowments and General Fund
- Quarterly Certifications
- Hierarchy of Reports distinguished by level of detail provided
- Non-Sponsored Projects reporting available in Axiom
- Sponsored Projects reporting not available in Axiom
Reports
listed in order of most detail

1. Detail by Fund
   • to see Income Statement/Transaction Details

2. Summary by Fund (100,130,131,150,305,900)
   - Summary by Fund (108)
   - Summary by Fund (3xx)
   • to see Summary Level Data for a given Fund

3. All Funds View
   • to see Total Available Resources across all Funds
Reports

Non-Sponsored Projects

- to see budgets and actuals for non-sponsored projects
  - total life of the project (all fiscal years)
- opening report
  - always select a Refresh Variable
  - never just click OK
  - doing so will pull in every Non-Sponsored Project in existence
## Report Characteristics

<table>
<thead>
<tr>
<th>Report</th>
<th>Historical Data</th>
<th>Net Asset Balances</th>
<th>Chartstring Detail</th>
<th>Income Statement</th>
<th>Transaction Data (GL, PO, Payroll)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Detail by Fund</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Summary by Fund (100,130,131,150,305,900)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<td>No</td>
</tr>
<tr>
<td>Summary by Fund (3xx)</td>
<td>Yes</td>
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<tr>
<td>Summary by Fund (108)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>All Funds View</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Non-Sponsored Projects</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Reports

- Use Reporting Unit: Dean and VP level
- Reports are as-of period end
- Data updated on a nightly basis
- Revenue is displayed as positive number *unlike PeopleSoft*
  - Calculations take this into account
- Net asset surpluses displayed as positive; net asset deficits displayed as negative, *unlike PeopleSoft*
1. **Refresh Variables**
   - update report with the most current data
   - prompted to define values
   - selected values will be applied to report to impact the data refresh

2. **Quick Filter**
   - temporarily apply a filter to report

3. **Drill**
   - drill into a particular row so that you can see the detail on that row by chartstring, chartfield value, or transaction level detail

4. **Change View**
   - change the report row and column display between pre-defined layouts

5. **Print/Snapshot/Email**
   - print, snapshot (copy to excel) for further manipulation, or email
Demos
&
Group Practice
Login

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. For first-time login, there are some additional steps depending on your web browser.
   - See directions at https://www.uvm.edu/finance/user-guides

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
Login – continued

View after selecting Windows Client
Group Practice #1: Detail By Fund

Open - Detail By Fund

1. Refresh Variables
   - select current period and fiscal year
   - select your reporting unit
   - select fund 100

2. Look through the column headers

3. Look through the rows

4. Drill - Double Click On
   - salary row; select Pay Drill
   - expense row; select PO Drill
   - expense row; select GL Drill

5. Change View - select each

6. Quick Filter - apply for dept

7. Refresh - change fund to 150
Group Practice #2: Summary by Fund

Open SBF (100,130,131,150,305,900)

1. Refresh Variables
   - select current period and fiscal year
   - select your reporting unit
   - select fund 150
   - select query level source

2. Look through the column headers

3. Look through the rows

4. Drill - Double Click On
   - any row; select Chartstring Drill
   - any row; select Account Drill

5. Change View - select each

6. Quick Filter - apply for source

7. Refresh - change period
Explore on Your Own