Axiom Reports Training
Fall 2018
Agenda

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Introductions
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)
   • to see Summary Level Data for a given Fund

3. All Funds View
   • to see Total Available Resources across all Funds
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
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
- Refresh variables define how you look at the data; the underlying data/tables that reports pull from doesn’t change.
## 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>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Summary by Fund (3xx)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
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<tr>
<td>Summary by Fund (108)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<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>
Report Functionality

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 (with a snapshot, or as a report with QuickFilter)
Demos
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. Web browser specific steps
   - If using Internet Explorer go to step 4
   - If using Chrome or Firefox click on “Download” in upper-right corner
   - Then click appropriate link for your browser

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
Explore on your own