

SINGLE-YEAR SALARY PLANNING

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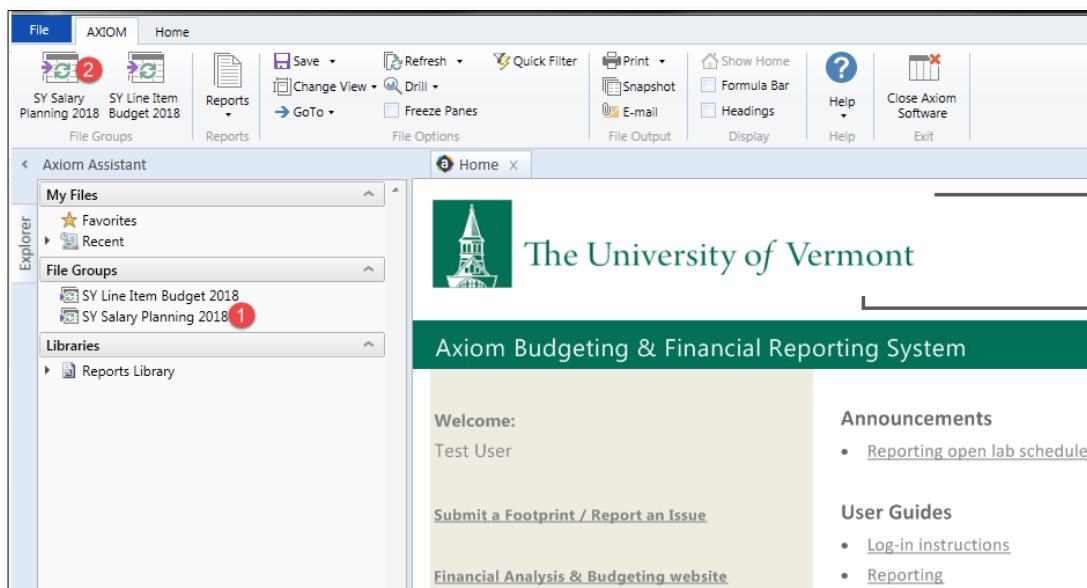
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Need help? Please [submit a Footprint](#)

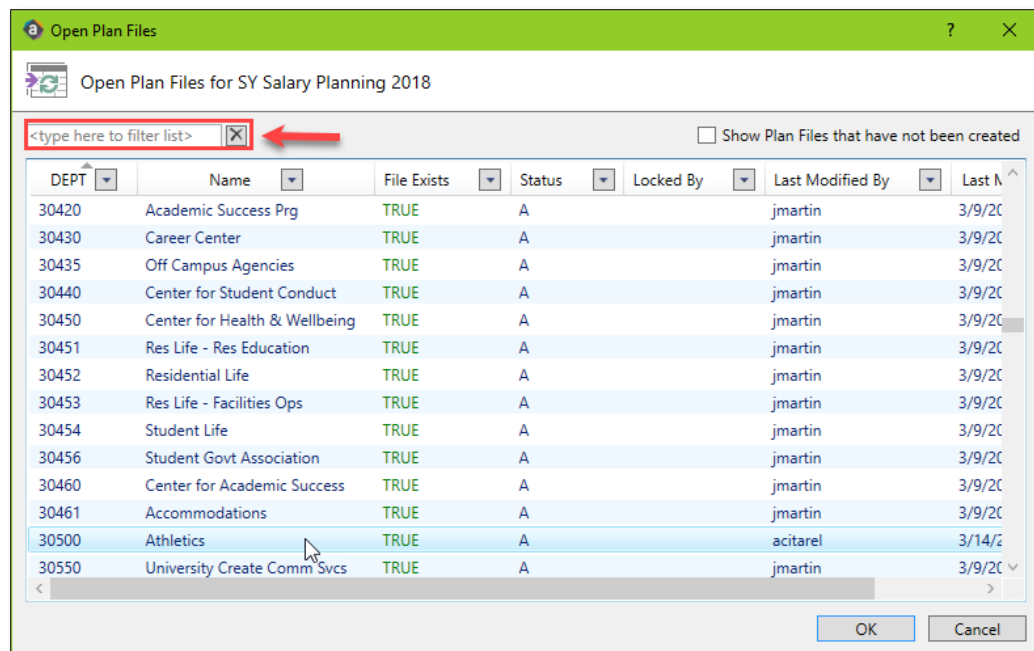
OPENING A PLAN FILE

A Plan File is the form used to enter your new-year salary and distribution detail. Each department has a Plan File containing the active personnel as of March 31, based on employee position in the HR home department.

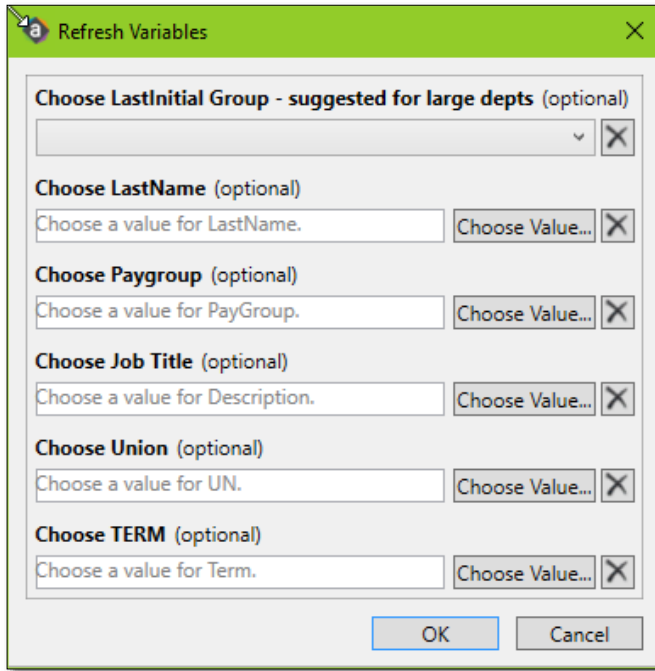
1. To open a Plan File, either (1) go to **File Group**→**SY Salary Planning 20XX** and double-click on “SY Salary Planning 20XX” or (2) select SY Salary Planning 20XX from the Axiom ribbon.



2. A pop-up window will open. You will see a list of the departments to which you have salary planning access. Select the plan file you'd like to work on, or search from the list by entering the Department number or name of the plan file in the filter box. Double-click on the Plan File, or select it and click “OK.”



The Refresh Variables pop-up will open. This pop-up allows you to isolate a smaller group of employees (or single employee) to work on at one time. This can be helpful for large departments with many employees. Just click OK without selecting a filter if you prefer to start with all employees in the Plan File; you will have the opportunity to filter later in the process if desired.

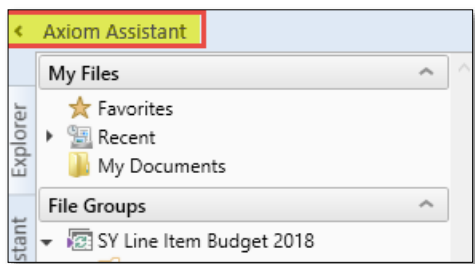


The "Refresh Variables" dialog box is shown. It has a green title bar with a close button (X). The dialog contains several optional filter sections, each with a text input field and a "Choose Value..." button with a small X icon:

- Choose LastInitial Group - suggested for large depts (optional)**: A dropdown menu.
- Choose LastName (optional)**: Text input field with placeholder "Choose a value for LastName."
- Choose Paygroup (optional)**: Text input field with placeholder "Choose a value for PayGroup."
- Choose Job Title (optional)**: Text input field with placeholder "Choose a value for Description."
- Choose Union (optional)**: Text input field with placeholder "Choose a value for UN."
- Choose TERM (optional)**: Text input field with placeholder "Choose a value for Term."

At the bottom are "OK" and "Cancel" buttons.

3. The salary planning worksheet will open. To maximize the input screen, click on the arrow next to Axiom Assistant to hide the left-hand navigation pane.




GENERAL NAVIGATION

Plan File Layout

When you first open a Plan File, you will see a consolidated list of employees similar to the example below. Expanding the list to see more detail is explained in the [Salary Adjustments](#), [Increases](#), and [Distributions](#) sections below.

The employees are listed in alphabetical order by last name. The leftmost columns of the Plan File display Employee Name, Job Title, Union Code, Employee ID, Pay Group, Empl Record, CY (Current Year) FTE, CY Term, and Position Number, as shown below.

 The University of Vermont		Salary Planning Home Dept: <input type="text"/> Budget Year: 2018						
Employee Name	Job Title	Union Code	Employee ID	Pay Group	Empl Record	CY FTE	CY Term	Pos Num
[REDACTED]	Assistant Professor	U1	0124304	SM1	0	1.000	9	V020130
[REDACTED]	Graduate Assistant	NU	0130725	SM1	3	0.250	12	V00021649
[REDACTED]	Graduate Assistant	NU	0132090	SM1	1	0.500	12	V00023653
[REDACTED]	Graduate Assistant	NU	0133159	SM1	3	0.500	12	V00020525
[REDACTED]	Senior Lecturer	U1	0051904	SM1	0	1.000	9	V010413

The right-hand columns of the Plan File display CY Salary, CY Adjusted Salary (as entered by the end-user to reflect any salary adjustments known/planned prior to June 30), NY (New Year) Salary, \$ Increase, % Increase, CY Adjustment, and NY Exception Code.

CY Salary	CY Adj	NY Salary	\$ Increase	% Increase	CY Adjustment	NY Exception
\$38,500.00	\$38,500.00	\$38,500.00	\$0.00	0.00%		
\$39,000.00	\$39,000.00	\$39,000.00	\$0.00	0.00%		

Employee Groups Not Included

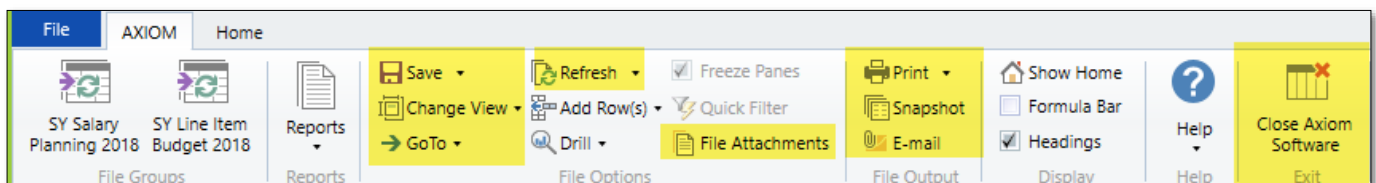
The following employee types are not included in Axiom salary planning:

- | | |
|--------------------------------|---|
| Temporary Employees | Student Employees |
| Graduate Students <12 months | Part-time faculty (4-, 5-, 9-, 10-, 11- and 12-month) |
| Appointments with \$0 salaries | Work-Study Employees |

New Year salaries for employees in the groups above must be set via ePAR and applicable HRS paperwork.

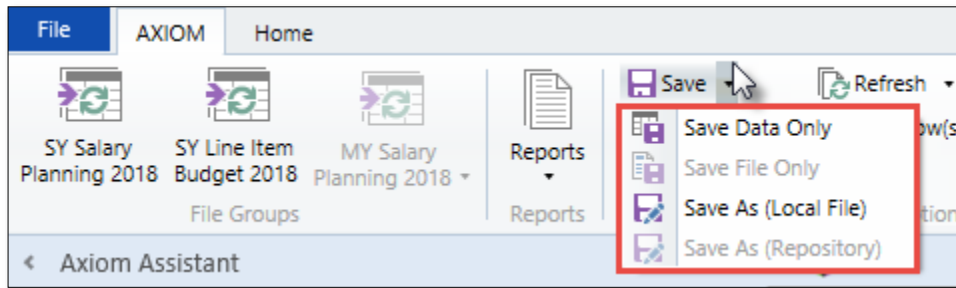
Axiom Toolbar

The Axiom toolbar contains several buttons for access to key functionality:

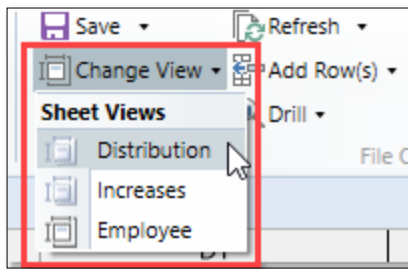


Save: Click “Save” (or CTRL-S) to save your data and reload the Plan File.

- “Save” will open a pop-up that asks you whether you are ready to advance your file to the next process step (see the [Process Management / Workflow](#) section below for more information).
- While working on entering data choose “Save Data Only” from the Save dropdown to save your data without being prompted to advance the file to the next process step.
- “Save File Only” and “Save As Repository” are not available options. “Save File Only” would save the Plan File, but not your data.



Change View: The “Change View” dropdown lets you toggle among “Employees” for a consolidated list of employees, “Increases” for entering salary increases, or “Distributions” to show salary distributions:



GoTo: Use the “GoTo” dropdown to go immediately to a specific employee.

Refresh: The “Refresh” button lets you filter your Plan File by a Last Initial Group, Last Name, Pay Group, Job Title, Union, or Term to set salaries and distributions for a single employee or a subset of employees at a time.

File Attachments: Click “File Attachments” to upload additional documentation or notes to your Plan File, or to view previously saved attachments in the future.

Print: Print a hard-copy of the Plan File by selecting one of the layouts from the “Print” dropdown.

Snapshot: Use the “Snapshot” button to create an electronic copy of your Plan File that you can save locally and edit or annotate in Excel (outside of Axiom).

Email: Use the “Email” button to email a snapshot of the Plan File to yourself or a colleague.

Close Axiom Software: Click the “Close Axiom Software” icon to close the application after you have saved your work.

NOTE: The “Quick Filter” button is grayed out because this functionality is not applicable to salary planning. Use “Refresh” to filter your Plan File by specific employee characteristics.

SALARY INCREASES

To view and enter salary increases, from the Axiom ribbon select **Change View→Increases**. Employees will be displayed in alphabetical order with blue salary component input fields. To jump quickly to a specific employee, from the Axiom Ribbon select **GoTo→Employee** and select the name.

Current Year Salary Adjustments

Axiom brings in Current Year Salaries as of March 31. Axiom allows you to calculate an employee’s New Year salary increases based on a different Current Year Salary than the one imported into Axiom as of March 31 by using the **CY salary (Adjusted)** box and **CY Adjustment Type**.

Example 1: Joe’s base salary is \$100,000. Joe is currently on sabbatical with his CY Salary temporarily reduced to \$77,300 (77.3%). Joe’s NY salary increase needs to be calculated based on his regular salary of \$100,000, so his CY (Adjusted) Salary needs to be set to \$100,000.

Example 2: Sarah’s term is changing from 12 mos to 9 mos effective 7/1. Her CY Salary of \$120,000 would be adjusted in Axiom (divide by 12, multiply by 9) to \$90,000 so that NY increases would be calculated on the \$90,000.

NOTE: Skip the Current Year (Adjusted) steps when there is no reason to change the Current Year Salary listed before entering NY increases.

If you need to adjust a Current Year Salary, do the following:

1. Enter the salary you want New Year increase calculations to be based upon in the Current Year (Adjusted) cell.
2. Select the appropriate Current Year Adjustment Type from the dropdown box, which is required if you have adjusted the CY Salary.
3. The difference will be calculated and display to the right in column EE.

Current Year Salary (as of 03/30/2017)	\$48,446.63	CY Increment
Current Year (Adjusted)	1 \$50,000.00	3 \$1,553.37
Current Year Adjustment Type	2 Reclass/Promotion ▼	

Once this is complete, all NY increase components will be based on the updated current year salary.

NOTE: Entering a Current Year (Adjusted) salary does not replace any ePar actions or HRS paperwork.

New Year Salary Increases

Below is a screenshot of the basic navigation related to entering New Year salary increases:

Employee Name	Job Title	Union Code	Employee ID	Pay Group	Empl Record	CY FTE	CY Term	Pos Num
		UE		KRO	1	1.000	9	
Current Year Salary (as of 03/30/2017) Current Year (Adjusted) Current Year Adjustment Type		\$32,552.00		CY Increment		\$0.00		
Delete Record <input type="button" value="Delete Record"/>		New Year Salary New Year Exception Code		\$37,003.04 Change in Term		Proposed NY Term 12		Term Begins 9/1/2017
Increases % Increase \$ Increase Performance Promotion << Add new adjustment >>		\$ - 300.00 - 3,500.00		% 1.500% 0.000% 0.500% 0.000%		NY Increment 488.28 300.00 162.76 3,500.00		
Comments (150 characters) Promotion effective 7/1								

1. The New Year Salary will calculate automatically based on the Increase inputs entered in the blue input cells: % Increase, \$ Increase, and Performance (% or \$ amount).
2. When applicable, select additional salary increase categories from the drop-down box. There is also the ability to <<Add New Adjustment>> if there are multiple additional increase types to be selected (options below):

Minimum (often occurs in conjunction w a promotion)
Promotion
Research (can be flat \$ or %)
Variable - COM
Other

3. The NY Increment column will display each salary increase amount.
4. Use the New Year Exception Code when there is an increase effective July 1 that falls outside of the salary guidelines. It can be selected to reflect significant % increases or decreases (e.g. Change in Term, Change in FTE, Sabbatical, New Hire, Promotion, etc.).
 - If you select Change in Term or Change in FTE, a new box will appear to the right of the New Year Exception Code where you will be prompted to enter the Proposed New Term or FTE.
 - Entering an Exception Code or Proposed New Term/FTE in Axiom does not replace required ePAR or HRS paperwork.
5. For employees whose term is <12 months, choose the correct term start date from the "Term Begins" drop-down box. (9-month employees will default to a start date of 9/1.) The only purpose of this date is to allow Axiom to calculate correctly the salary dollar amounts that will be charged to each distribution chartstring based on the effective dates and percent distributions selected.
6. Comments field should be completed when appropriate.

NOTE: It is recommended that you **SAVE** your work after each NY salary is completed.

NOTE: Entering an Exception Code or Proposed New Term/FTE does not replace any ePAR actions or HRS paperwork.

Info for KRONOS Employees

Axiom salary plan files will display the converted Hourly Rate (annual salary divided by 2080) next to the salary increase fields for employees with 12-month terms who use the Kronos system as of April 1.

Increases	\$	&/or	%	HR Rate	NY Increment
% Increase	-		1.500%	0.25	519.48
\$ Increase	-		0.000%	0.00	-
Performance	400.00		0.000%	0.19	400.00
	-		0.000%	0.00	-

<< Add new adjustment >>

NOTE: In late April 2024, the university will begin a multi-month process to expand use of the Kronos time-keeping system to all non-exempt staff. This process is separate from setting new year salaries in Axiom. For more information on UVM's Kronos Time-Keeping Expansion please visit [UVM's Kronos Time-Keeping Expansion](#) project website. For questions related to a specific employee, please contact payroll@uvm.edu.

DELETING A RECORD

Employee records in Axiom Single Year Salary Planning are loaded from PeopleSoft on March 31. This is a snapshot in time; there are no further updates to employee info in Axiom SYSP files that feed from PeopleSoft. Therefore, some employees should be removed from Axiom:

- **Termination:** If an employee will be terminated by 7/1, remove the employee from Axiom to prevent a new year record in HCM.
- **Position or home department change:** If on 7/1 an employee will be in a different position number or home department than the position number in Axiom, remove the employee from Axiom. Following removal from Axiom, one of the two steps below will be required, depending on the salary:
 - Submit a 7/1 ePAR with the new position, salary, distribution, as applicable.
 - If the employee's 7/1 salary is not changing and the position and home department are correct in PeopleSoft, send an email to payroll@uvm.edu requesting to add a 7/1 Pay Rate Change/Annual Increase instead of submitting a 7/1 ePAR.
- **Employees with future dated termination rows in HCM should be removed.** Individuals with future dated rows in PeopleSoft HCM are to be removed from Axiom plan files (note that most of these individuals are graduate students, but not all are graduate students). Utilize the PeopleSoft HCM query UV_ACTIVE_JOBS_WITH_FUTURE_ROW to determine which individuals have a future dated row, and therefore must be deleted from an Axiom plan file. To run this query, navigate to Peoplesoft's Query Manager, then run the query using the last date of the current fiscal year:

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel
UV_ACTIVE_JOBS_WITH_FUTURE_ROW	Active jobs with future rows	Public		HTML	Excel

UV_ACTIVE_JOBS_WITH_FUTURE_ROW - Active jobs with future rows

*Eff Date:

Dept ID (% for all):

Job Code (% for all):

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (54 kb)

View All

Row	Name	ID	Empl Record	Eff Date
1				07/01/2024
2				09/01/2024
3				09/01/2024

The query will return results of individuals with future dated rows. These individuals should be deleted from Axiom salary plan files.

To delete an Employee Record, select "Yes" from the Delete Record dropdown box and "Save." Employee Records should be deleted when an employee either will be terminating prior to July 1 or will have \$0 salary for that position effective July 1.

Employee Name	Job Title	Code	Employee ID
Delete			
<i>Upon Saving, this Employee will be deleted from the file. Further action will require submitting an ePAR.</i>			
Current Year Salary (as of 03/30/2017)			\$32,552.00
Current Year (Adjusted)			\$32,552.00
Current Year Adjustment Type			
New Year Salary			\$37,003.04
New Year Exception Code			
Increases			\$

Delete Record

Yes

Yes

NOTE: Once an Employee Record is deleted, you CANNOT undo. Any Employee Record deleted in error will require appropriate ePar and HRS paperwork to load a New Year salary and salary distributions.

NOTE: Deleting an Employee Record in Axiom does not replace required ePar or HRS termination paperwork.

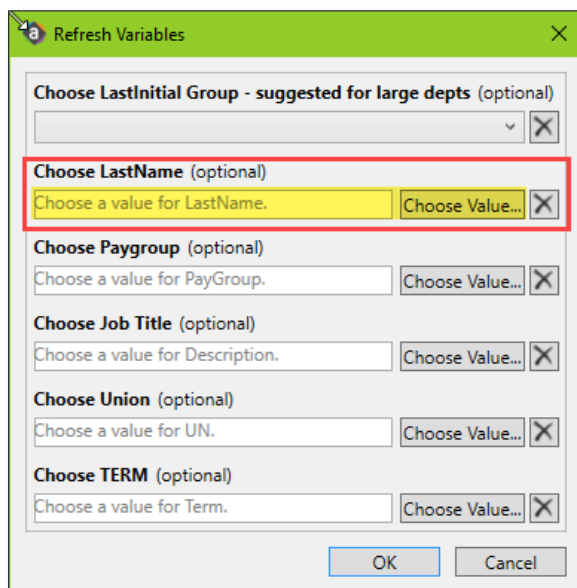
SALARY DISTRIBUTIONS

Viewing Distributions

To view the salary distribution detail, go to the Axiom Ribbon and select **Change View** → **Distribution**.

NOTE: It is recommended that you filter your Plan File to contain just one employee at a time when working on salary distributions, particularly for complex distributions. Without isolating, you will be brought back to the top of the entire file plan each time you Save. Working on one person at a time will also enhance the system performance and minimize save time.

To isolate an individual employee to work on, click “Refresh” on the Axiom Ribbon and select →**Refresh**→**Choose LastName**→**Choose Value** (or type the last name if preferred).



The dialog box titled "Refresh Variables" contains several optional filters. The "Choose LastName (optional)" section is highlighted with a red box and contains a text field with the placeholder "Choose a value for LastName." and a "Choose Value..." button. Other filters include "Choose LastInitial Group", "Choose Paygroup", "Choose Job Title", "Choose Union", and "Choose TERM", each with a similar text field and button. "OK" and "Cancel" buttons are at the bottom.

Changing Distributions

Salary distributions are loaded into Axiom with the most current effective-dated distribution as of March 31. The distribution displays as a single effective date of 7/01/20XX - 6/30/20XX. This base distribution can be built out further when applicable by adding effective date ranges and modifying chartstrings and distribution percentages.

Salary Distribution				3	% Distributed	Salary Distributed									
					88.250%	32,238.18									
Copy/Delete	2	Start Date	End Date	% Dist	\$ Distribution	Account	OU	Dept	Fund	Source	Function	Project	Program	Purpose	
		7/1/2017	12/31/2017	100.000%	18,265.26										
		7/1/2017	12/31/2017	50.000%	9,132.63	52000	15	55610	100	100005	412	032404	0601	0000	
		7/1/2017	12/31/2017	43.400%	7,927.12	52000	15	55700	300	201002	411	032404	0601	0000	
		7/1/2017	12/31/2017	6.600%	1,205.51	52000	15	55700	300	201002	411	032401	0601	0000	
						<<Add Chart String>>									
		1/1/2018	3/31/2018	4	53.000%	4,840.29									
X	5	1/1/2018	3/31/2018	47.000%	-	52000	15	55610	100	100005	412	032404	0601	0000	
		1/1/2018	3/31/2018	53.000%	4,840.29	52000	15	55700	300	201002	411	032404	0601	0000	
						<<Add Chart String>>									
C	6	4/1/2018	6/30/2018	100.000%	9,132.63										
C		4/1/2018	6/30/2018	47.000%	4,292.34	52000	15	55610	100	100005	412	032404	0601	0000	
C		4/1/2018	6/30/2018	53.000%	4,840.29	52000	15	55700	300	201002	411	032404	0601	0000	
						<<Add Chart String>>									

Salary Distribution functionality:

1. **Chartfield values** can be modified by double-clicking in the chartfield value and selecting the new value from the available options in the pop-up. (You cannot type in chartfield values.) Type the chartfield number or name into the pop-up filter box to find a chartfield value quickly. To quickly retrieve "NA" for Project, type "NA" or "N/A" and then scroll to the bottom of the list to view and select "NA".
2. The **Start Date** for the first effective date range will be defaulted to 7/01/20XX, regardless of the term of an employee. The final **End Date** is defaulted to 6/30/20XX, regardless of the term of the employee.
3. The **distribution** for each effective date and the full year (7/01-6/30) must total **100%**.
4. **Distributions that are not equal to 100%** will display as a **red** error. In the example above, a line is flagged for deletion and the remaining chartstring does not equal 100%. Once it is modified to = 100%, the red flag will disappear.
5. To **Delete a Chartstring**, select "X" from the dropdown box. You may delete an entire effective dated range of chartstrings by selecting "X" on the top row of the distribution block to the left of Start Date. The rows will delete upon Save. See callout below regarding error messages related to deleting chartstrings.
6. To **create a new effective date range**, copy an entire block of chartstrings down by selecting "C" in the top row of the distribution(s) (cell left of Start Date) you want to copy. Upon Save, a new, copied block will be inserted below the selected effective date range. The new block Start Date will default to 1 day later than the previous Start Date. You will need to adjust the Start date as desired, and the End Date for the previous date range will adjust automatically.
7. To **Add a Chartstring(s)** to a distribution, double-click <<Add Chart String>>. A new chartstring will be inserted, auto-populated with the chartfield values of the last chartstring on the distribution. Double-click in the blue chartfield value cells to select new values as needed and populate the % distributed. You may add more than one row at a time, then edit new row values.

NOTE: When adding more than one line, be mindful of Axiom's auto-populate feature. When multiple new lines are added, each new line will populate with the originating row's chartstring values. When you change chartstring value(s) in any of the new rows, the chartfield values of any subsequent new rows below it will also change to mirror the changed chartstring.

Therefore, the following tips are recommended:

- (1) Make any edits needed to existing chartstrings and save plan file *before* adding/copying new ones.
- (2) When modifying newly added chartstrings, work from top to bottom.

8. If an employee has no distribution date range, double-click on <<Add Effective Period>> to create a new date range. New effective dates must be entered in MM/DD/YYYY format, with slashes (/) or hyphens (-) separating the month, day, and year.

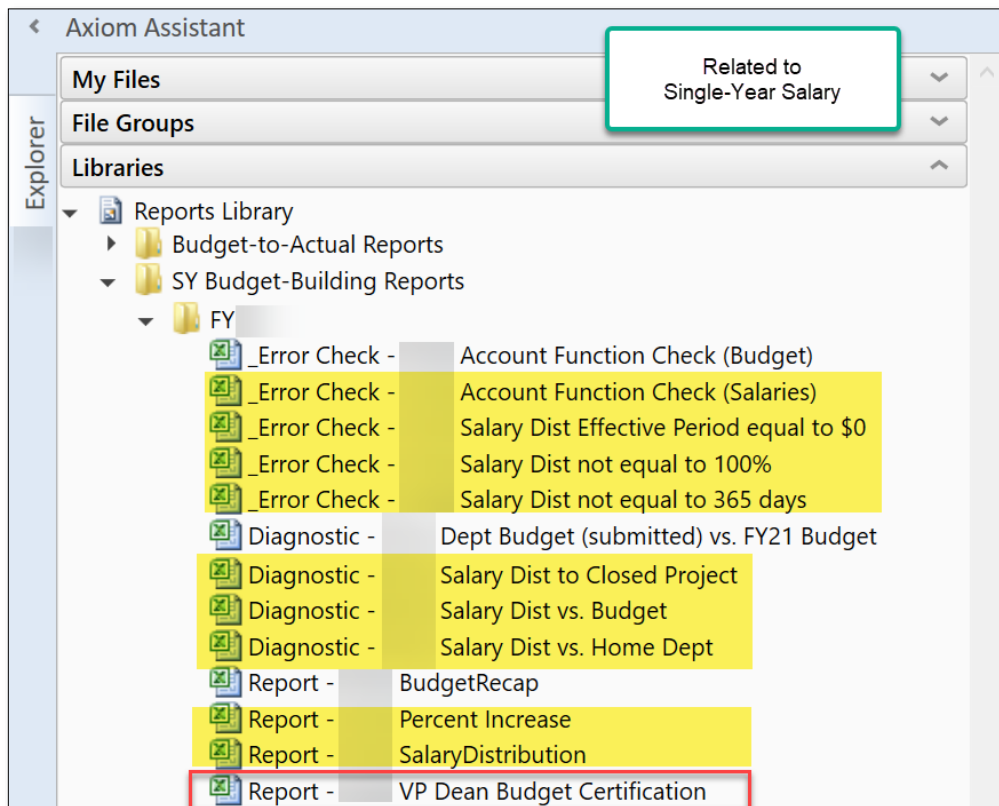
Mantra "SAVE AND SAVE OFTEN" when working in SYSP and SYLI to prevent loss of work from save data error messages.

If you add a new CS or effective period and try to delete a row in the newly added lines, you may encounter a save data error. To prevent this situation, save the Plan File again after adding the new CS or effective period BEFORE deleting any rows in the newly added section. The rationale for this is the original save to populate a new CS or effective period for viewing in the Plan File did not yet save them to the data tables. The system cannot delete data that does not yet exist in the data tables hence the data save error.

DIAGNOSTIC TOOLS & REPORTS

There are four error checks, three diagnostics, and two reports available for salary planning, as well as one required certification. All reports are available in the Reports Library > SY REPORTS folder.

Double-click on any report to run it. A Refresh Variables pop-up window will open. Choose your Reporting Unit (College, School, or Division). The report will display only the data for the departments to which you have access for salary planning. If you choose a Reporting Unit to which you do not have access, the report will be blank.



Diagnostic Tools

- Run before submitting plan files to FAB.
- Do not submit diagnostics to FAB.
 - **Account Function Check (Salaries)** checks if combination of account and function are appropriate.
 - **Salary Dist Effective Period equal to \$0** plan files cannot be submitted with an effective period equal to \$0. This will point out if any exist.
 - **Salary Dist not equal to 100%** displays salary distributions that do not total 100%.
 - **Salary Dist not equal to 365 days** displays salary distributions that do not total 365 days.

- **Salary Dist to Closed Project** flags distributions to a Project whose start/end dates fall outside of a Project start/end date.
 - Distribution lines containing a project number that is outside of that project's start/end date need to be corrected to eliminate the project out-of-bounds issue. The SYSP will provide an alert when you encounter such a situation. Please contact your SPA analyst if you believe the project dates need to be updated to accommodate a known extension (for example).

Grant funded employees with < 12 month terms

- All salary distribution lines must contain a dollar amount; Peoplesoft will not accept \$0. In cases where employees occupy terms that are < 12 months, it is necessary to extend the project distributions of these individuals to include a 7/1 distribution start date and/or extend end date to 6/30. This will result in an alert as stated above, but it does not require additional action within Axiom or with SPA. The alert should be noted and corrected when the project is out-of-bounds **within the active term** of the employee.
 - **Example:** A 9-month faculty member (9/1-5/31) who is not paid July/August via salary distribution, has 10% of their salary distributed to a project beginning 9/1. Instead of that distribution block beginning with an effective date of 9/1, the distribution should be adjusted to be effective starting 7/1 even though the project doesn't begin until 9/1. This will eliminate the \$0 distribution and salaries will not be applied for July/August since that is outside the faculty member's appointed term.
- **Salary Dist vs. Salary Budget** compares the total Fund 100 and Fund 150 salary distributions from the salary Plan File for department to the corresponding E-level salary budgets entered in the line-item budget Plan File. This report enables you to check that there is enough money budgeted in Fund 100 or Fund 150 for department to cover salary commitments to these funds.
 - **Salary Dist vs. Home Dept** shows employees outside the Home Dept who are distributed to that Dept.

Reports

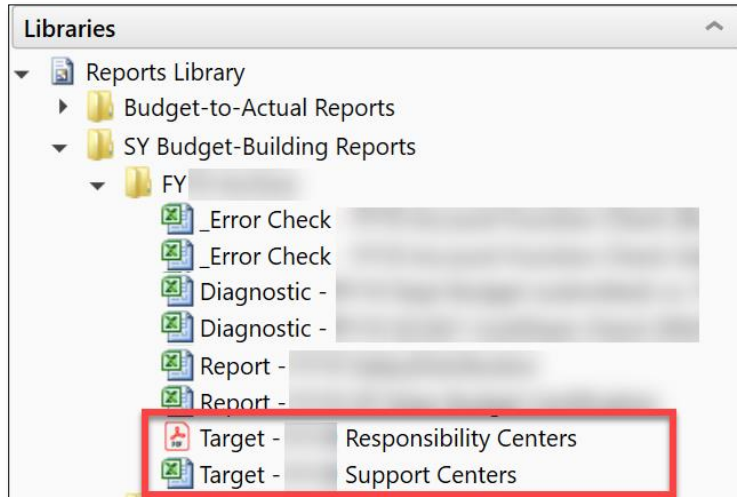
- Run before submitting plan files to FAB.
- Do not submit reports to FAB.
- If desired, save a local copy.
 - **Percent Increase** shows the percent salary increase for each employee compared to both the CY and the CY Adjusted salaries. Comments entered in Plan Files will appear on this report.
 - **Salary Distribution** shows the distribution start/end dates, percentages, dollar amounts, and chartstrings for each employee.

Required Dean/VP Certification (for Senior Business Managers)

- Dean or Vice President on the budget submission and salary distributions of each Reporting Unit is required.
- Print VP/Dean Budget Certification report and obtain Dean/VP signature.
- **Submit** certification to FAB by scanning and saving a signed copy to:
 - *S:\fab_budget\FY 20xx\unit or target name*

Targets

- Targets for Responsibility, Hybrid and Support Centers are distributed via Axiom.
- They are located under folder SY Budget-Building Reports.



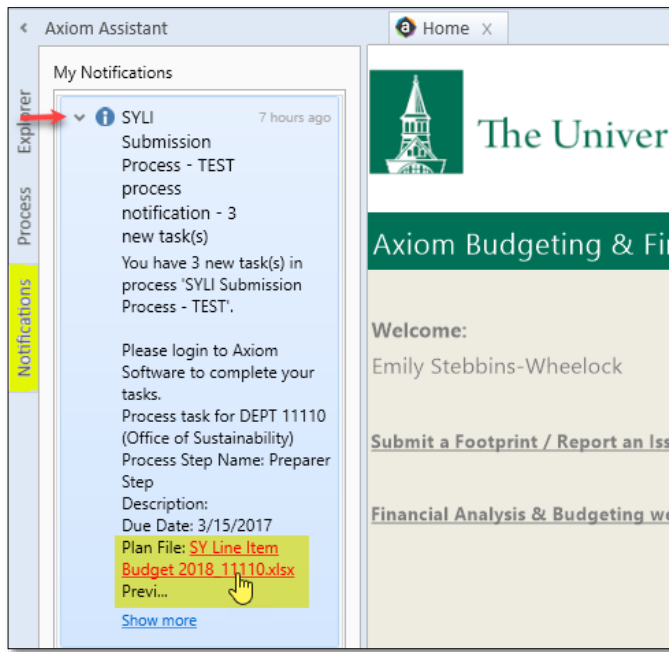
PROCESS MANAGEMENT / WORKFLOW

Axiom's "Process Management" functionality supports a three-step workflow for salary Plan Files:

1. Preparers enter salaries and distributions and submit to their Reviewer
2. Reviewers review salaries and distributions (with the option to edit or return them to the Preparer) and submit them to the Financial Analysis & Budgeting (FAB) Office
3. FAB review and final submission

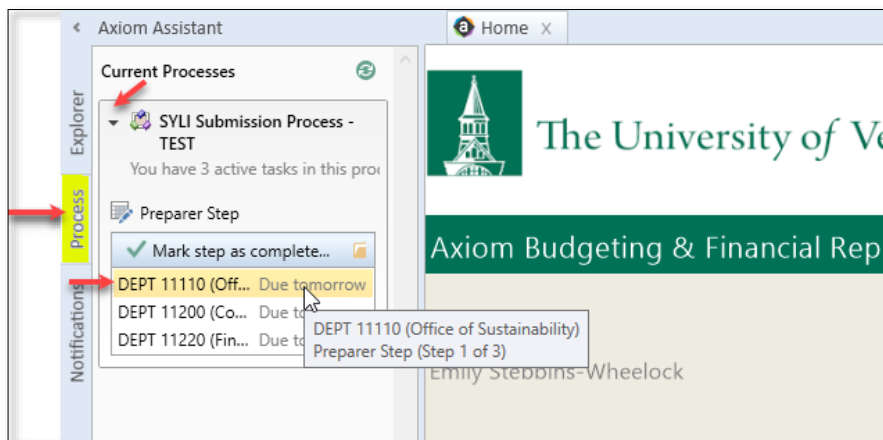
Preparers

At the beginning of the budget cycle, salary Preparers will receive an email notification from "noreply@axiomcpm.com" that you have Plan Files assigned to you that are ready to work on. When you log in to Axiom, you will also see notifications in the left-hand Notifications window:

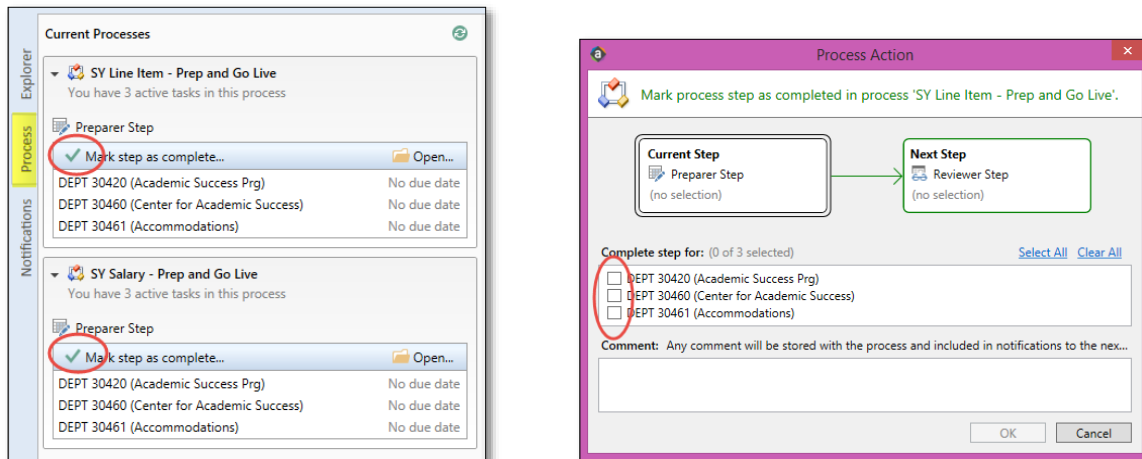


To clear Notifications, right-click on them and choose “Delete.” You can select and delete multiple Notifications at the same time.

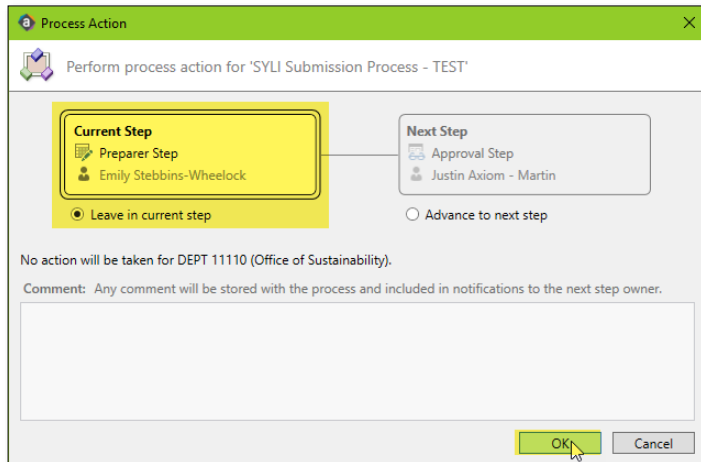
You will also see a list of the files assigned to you as a Preparer in the left-hand Process pane:



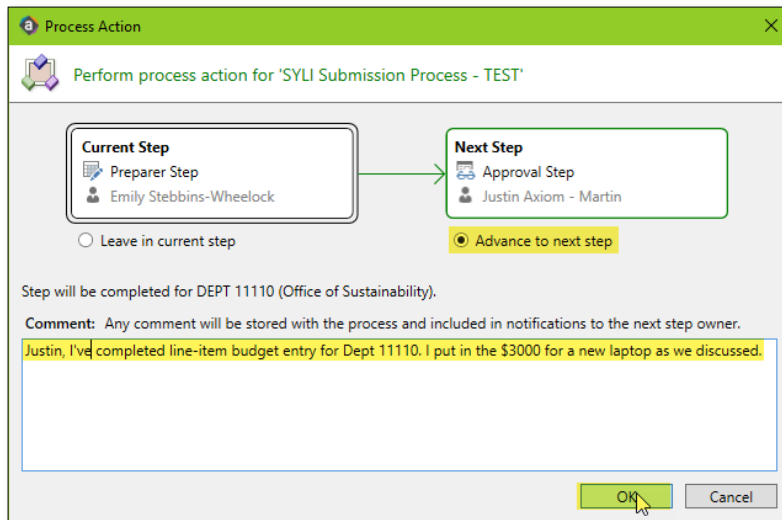
From here you can click on the green check mark to move one or multiple Plan Files to the next process step.



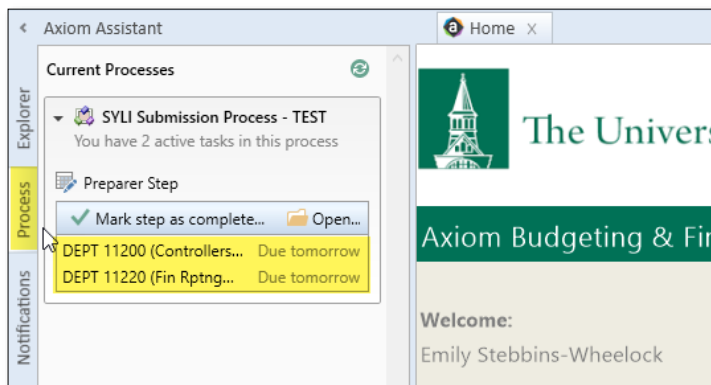
Every time you save a Plan File, a Process Action pop-up window will appear, asking if you are ready to advance the file to the next process step. (If you want to save without triggering the Process Action pop-up, choose “Save Data only” from the dropdown next to the Save button.) The default choice is to leave the Plan File at the current process step. If you are not done working with the Plan File and need to make more changes, hit “OK” to leave the file at the current step and continue working.



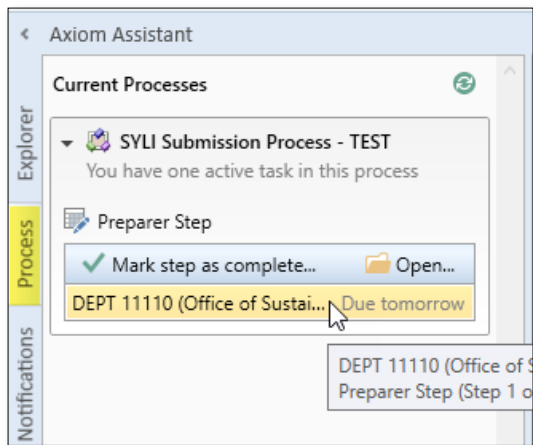
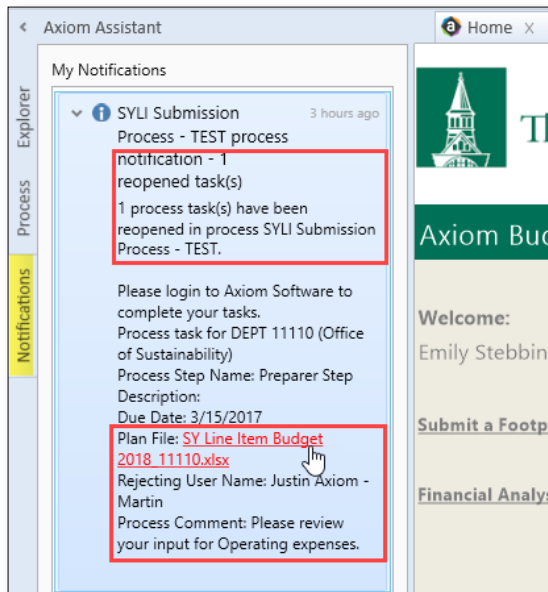
If you are ready to submit the Plan File to your Reviewer, tick the “Advance to the Next Step” button, enter any comments you’d like to pass on, and then click OK.



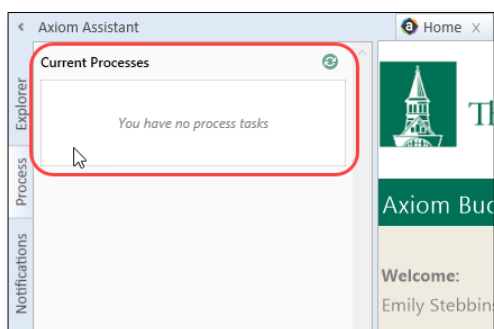
After you advance a Plan File to the next step, you may still open and view it, but you may no longer make or save any changes unless the Reviewer or FAB returns it to you. The Plan File will disappear from the list of available files in the Process pane.



If your Reviewer returns your Plan File to you for further edits, you will receive another email notification from “noreply@axiomepm.com”, and the file will again appear in your Notifications and Process panes:

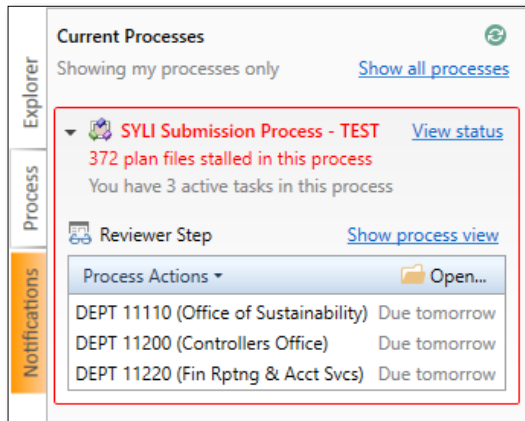


After you have submitted all of your assigned Plan Files to your Reviewer, you will not see any files in the Process pane. (You may still view them, but not save them, by opening them from the “SY Salary Planning” file group.)

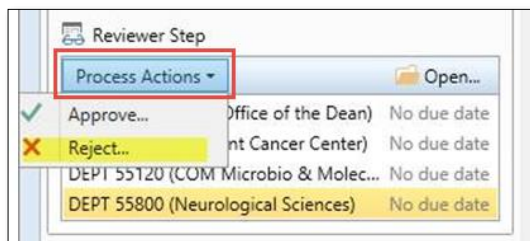


Reviewers

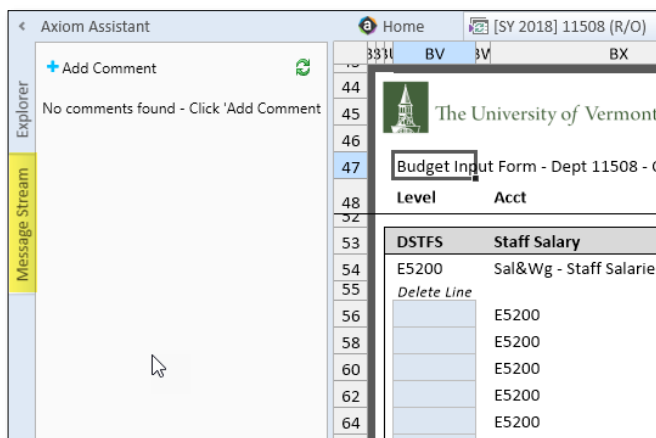
After a Preparer has submitted a Plan File for review, the Reviewer will receive an email notification from “noreply@axiomepm.com” that a Plan File is ready for them to work on. When you log in to Axiom, you will see a list of the files that are assigned to you in the left-hand Process pane, as well as notifications in the left-hand Notifications pane:



If you need to send a Plan File back to the Preparer click on the desired Plan File and then click on Process Actions. A pop-up will appear as shown below. Click on Reject. There is another method to send Plan Files back to the Preparer discussed in below Workflow process.



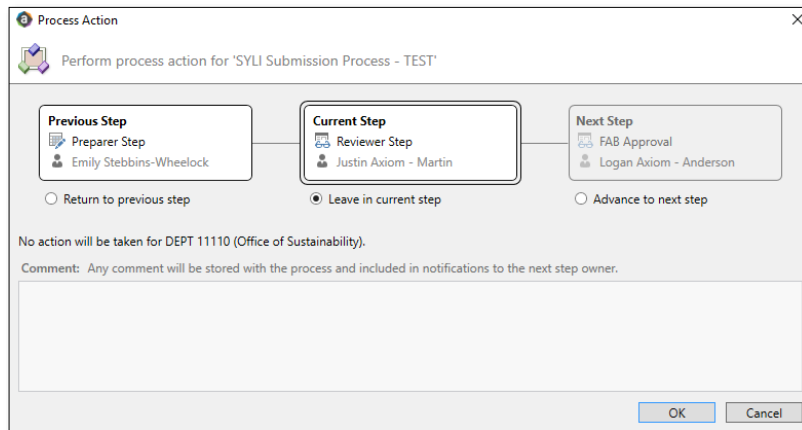
To begin the review process open desired Plan File. If the Preparer has entered any comments associated with this file, you will see them in the left-hand “Message Stream” pane.



As a Reviewer, you can (1) make any desired changes yourself before submitting the file to FAB, (2) submit the file to FAB as-is, or (3) return the file to the Preparer for editing.

Save the Plan File to open the Process Action pop-up window. Select the desired Process Action by ticking the relevant radio button, as shown in the three screenshots below:

1. Leave in current step (keep the file with you) if you need to continue working with it. This is the default.



Process Action

Perform process action for 'SYLI Submission Process - TEST'

Previous Step
Preparer Step
Emily Stebbins-Wheelock

Current Step
Reviewer Step
Justin Axiom - Martin

Next Step
FAB Approval
Logan Axiom - Anderson

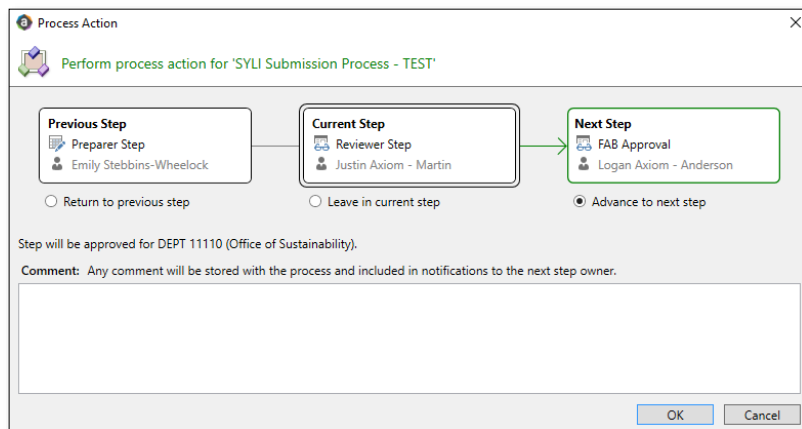
☐ Return to previous step ☒ Leave in current step ☐ Advance to next step

No action will be taken for DEPT 11110 (Office of Sustainability).

Comment: Any comment will be stored with the process and included in notifications to the next step owner.

OK Cancel

2. Advance to next step to submit the file to FAB for final approval, adding comments if desired.



Process Action

Perform process action for 'SYLI Submission Process - TEST'

Previous Step
Preparer Step
Emily Stebbins-Wheelock

Current Step
Reviewer Step
Justin Axiom - Martin

Next Step
FAB Approval
Logan Axiom - Anderson

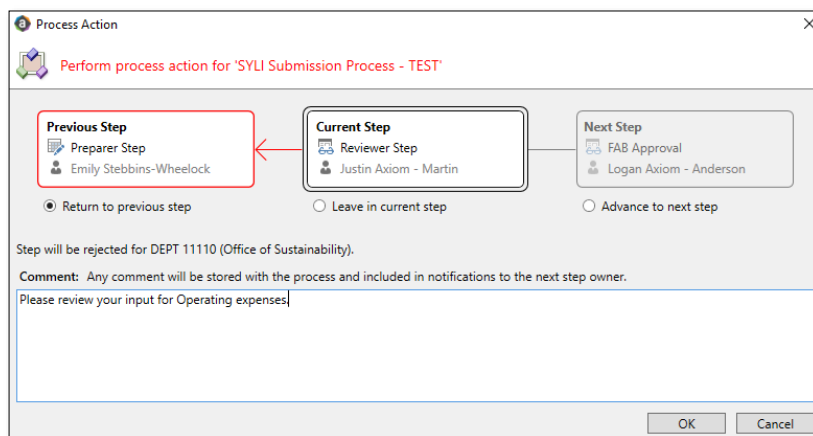
☐ Return to previous step ☐ Leave in current step ☒ Advance to next step

Step will be approved for DEPT 11110 (Office of Sustainability).

Comment: Any comment will be stored with the process and included in notifications to the next step owner.

OK Cancel

3. Return to previous step to return the file to the Preparer, adding comments if desired.



Process Action

Perform process action for 'SYLI Submission Process - TEST'

Previous Step
Preparer Step
Emily Stebbins-Wheelock

Current Step
Reviewer Step
Justin Axiom - Martin

Next Step
FAB Approval
Logan Axiom - Anderson

☒ Return to previous step ☐ Leave in current step ☐ Advance to next step

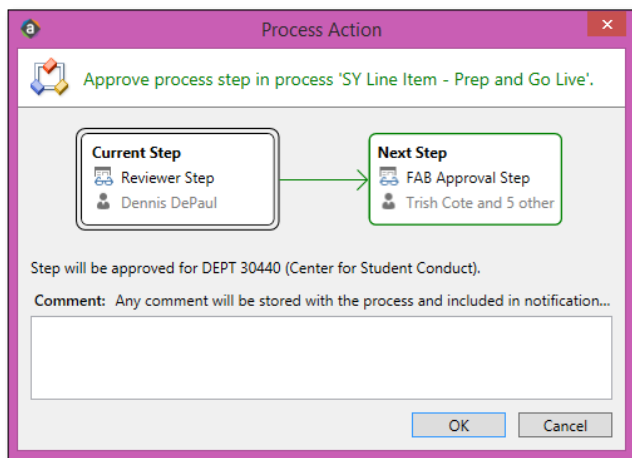
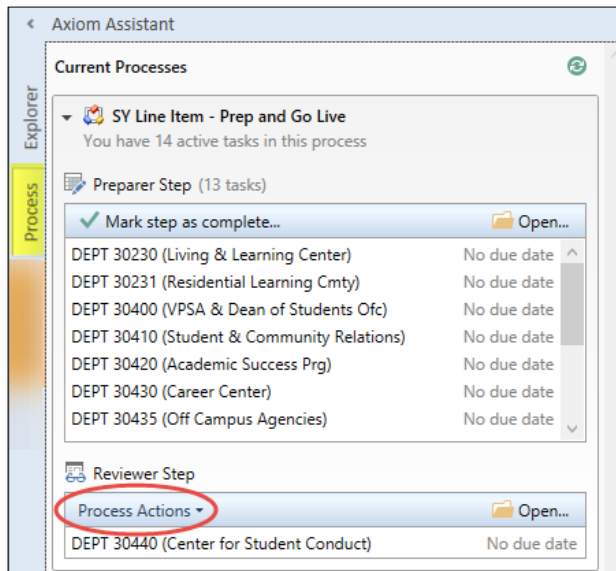
Step will be rejected for DEPT 11110 (Office of Sustainability).

Comment: Any comment will be stored with the process and included in notifications to the next step owner.

Please review your input for Operating expenses

OK Cancel

If you want to move multiple Plan Files between process steps, navigate to Process pane. Click on (1) green check mark if in Preparer Step or (2) Process Actions if Plan File is in Reviewer Step.



When done working in Axiom click the “Close Axiom Software” icon on the Axiom Ribbon.

