Axiom Budgeting System Training
FY 2018 - 2019

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Axiom Software

• An internet cloud based system designed for UAB Campus Organizations to perform:
  • RCM Metrics Tracking
  • Annual Budget Planning and Reporting
Axiom Software – Budget Planning Modules

Operational Budget Module

- Enrollment Planning Module
- Transfers Module
- Labor Planning Module
Axiom Software – Budget Planning Modules

• An internet cloud based system designed as a budgeting/forecasting tool for UAB Campus Organizations

• Access and Security
  • “User” access is based upon assigned Module
Axiom Software – Budget Planning Modules Access

Operational Budget Module and Transfer Module “User” role grants full functional access

Operational Budget Module

Transfers Module
Labor Planning Module “User” role grants full functional access
Axiom Software – Budget Planning Modules Security

• An internet cloud based system designed to be a budgeting/forecasting tool for UAB Campus Organizations

• Access and Security
  • “User” access is based upon assigned Module
  • Module security is set at the School/VP Oracle Org Range Level
## Axiom Software – Budget Planning Modules Security

<table>
<thead>
<tr>
<th>School/Unit</th>
<th>Oracle Org Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>GENERAL UAB ADMINISTRATION</td>
<td>010000000-019999999</td>
</tr>
<tr>
<td>INSTITUTIONAL</td>
<td>020000000-029999999</td>
</tr>
<tr>
<td>UAB ARTS</td>
<td>060000000-069999999</td>
</tr>
<tr>
<td>ATHLETICS DEPARTMENT</td>
<td>090000000-099999999</td>
</tr>
<tr>
<td>PRESIDENT</td>
<td>100000000-109999999</td>
</tr>
<tr>
<td>VP FINANCIAL AFFAIRS &amp; ADMIN</td>
<td>110000000-110999999</td>
</tr>
<tr>
<td>LISTER HILL LIBRARY OF HLTH SCIENCES</td>
<td>280000000-289999999</td>
</tr>
<tr>
<td>MERVYN H STERNE LIBRARY</td>
<td>290000000-299999999</td>
</tr>
<tr>
<td>SCHOOL OF MEDICINE</td>
<td>310000000-319999999</td>
</tr>
<tr>
<td>ACADEMIC JOINT DEPARTMENTS</td>
<td>390000000-399999999</td>
</tr>
<tr>
<td>SCHOOL OF DENTISTRY</td>
<td>320000000-329999999</td>
</tr>
<tr>
<td>SCHOOL OF OPTOMETRY</td>
<td>330000000-339999999</td>
</tr>
<tr>
<td>SCHOOL OF NURSING</td>
<td>340000000-349999999</td>
</tr>
<tr>
<td>SCHOOL OF HEALTH PROFESSIONS</td>
<td>350000000-359999999</td>
</tr>
<tr>
<td>SCHOOL OF PUBLIC HEALTH</td>
<td>370000000-379999999</td>
</tr>
<tr>
<td>COLLAT SCHOOL OF BUSINESS</td>
<td>420000000-429999999</td>
</tr>
<tr>
<td>SCHOOL OF EDUCATION</td>
<td>430000000-439999999</td>
</tr>
<tr>
<td>SCHOOL OF ENGINEERING</td>
<td>440000000-449999999</td>
</tr>
<tr>
<td>COLLEGE OF ARTS &amp; SCIENCES ADMIN</td>
<td>480000000-489999999</td>
</tr>
<tr>
<td>GRADUATE SCHOOL</td>
<td>510000000-519999999</td>
</tr>
<tr>
<td>HONORS COLLEGE</td>
<td>520000000-529999999</td>
</tr>
<tr>
<td>HEALTH SYSTEM</td>
<td>690000000-699999999</td>
</tr>
</tbody>
</table>

Module security grants access to ALL org codes within the School/VP Oracle Org Range.
Axiom Software – Budget Planning Modules

• An internet cloud based system designed to be a budgeting/forecasting tool for UAB Campus Organizations

• Access and Security
  • “User” access is based upon assigned Module
  • Module security is set at the School/VP Oracle Org Range Level

• Process Management (Workflow)
  • Set at the School/VP Oracle Org Range Level
Axiom Software – Budget Planning Modules
Process Management (Workflow)

User Role = Data Entry

1st School/VP Review & Approval

2nd – 4th School/VP Review & Approvals (Optional)

Budget Administration Approval
Axiom Software – Budget Planning Modules

• An internet cloud based system designed to be a budgeting/forecasting tool for UAB Campus Organizations

• Access and Security
  • “User” access is based upon assigned Module
  • Module security is set at the School/VP Oracle Org Range Level

• Workflow
  • Set at the School/VP Oracle Org Range Level

• Access/Security/Workflow Setup
  • Email Request to budgetadmin@uab.edu or tboll@uab.edu
# Axiom Software – Budget Planning Modules

## Data Refresh

<table>
<thead>
<tr>
<th>Item</th>
<th>Oracle Procedure</th>
<th>Axiom Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organizations</td>
<td>Daily</td>
<td>Daily</td>
</tr>
<tr>
<td>Accounts</td>
<td>Daily</td>
<td>Daily</td>
</tr>
<tr>
<td>Prior FY Actual $ (FY 2016-17)</td>
<td>UAB $ Balance as of September 30, 2017</td>
<td>One time snapshot March 31, 2018</td>
</tr>
<tr>
<td>Original Budget $ (FY 2017-18)</td>
<td>Approved as of October 1, 2017</td>
<td>One time snapshot March 31, 2018</td>
</tr>
<tr>
<td>Revised Budget $ (FY2017-18)</td>
<td>Daily</td>
<td>One time snapshot March 31, 2018</td>
</tr>
<tr>
<td>Current Actual YTD $ (FY 2017-18)</td>
<td>Daily</td>
<td>One time snapshot March 31, 2018</td>
</tr>
<tr>
<td>Positions (Plan File)</td>
<td>Daily</td>
<td>One time snapshot March 31, 2018</td>
</tr>
<tr>
<td>Assignments/Funding (Plan File)</td>
<td>Daily</td>
<td>One time snapshot March 31, 2018</td>
</tr>
<tr>
<td>People &amp; Positions List</td>
<td>Daily</td>
<td>Daily</td>
</tr>
</tbody>
</table>
Axiom Software – How to Login

- Internet Explorer Browser
- uab.axiom.cloud
- Login with Blazer ID and Password
Axiom Software – RCM Home Page Central Organization Codes
Axiom Software – RCM Home Page Central Organization Codes
Axiom Software – RCM Home Page Central Organization Codes
Axiom Software – Install/Launch Application

Install / Launch Application

Web Client
Windows Client
Excel Client

Tools & Add-ins

Initial Launch
Window Client Install Wizard
Axiom Software – Windows Client

Ribbon
Axiom Software – Windows Client

Axiom Assistant Navigation
Axiom Software – Windows Client

Labor Planning 2019
✓ Plan File = Organization Code
  • Positions
  • Assignments
  • Allocations (Funding)
  • Pooled Positions
  • External Funded Assignment

Budgeting 2019
✓ Plan File = Organization Code
  • ASBOF (GL Account Strings)
    • Revenue
    • Operating Expense
    • Transfers
Available Adhoc Reports
Save = Update database information
Axiom Software – Windows Client

Change View = Change default Module display
GoTo = Quick navigation to specific location within “Plan File”
✓ Labor Planning 2019 = Position
✓ Budgeting 2019 = ASBOF (GL Account)
Refresh = Reset display back to the last saved information
Open “Plan File” Tabs
Green Fields = Selection List Drop Down
Blue Fields = Data Entry/Update
### Labor Plan File Worksheets

<table>
<thead>
<tr>
<th>Position Name - Job Name</th>
<th>Dist. Org</th>
<th>Object</th>
<th>Name</th>
<th>Delete</th>
<th>CFB Group</th>
<th>CFB Object</th>
<th>Assign Cate</th>
</tr>
</thead>
<tbody>
<tr>
<td>113604000.00201.100121 - FA305E3.Accountant Sr</td>
<td>8103020</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1012446 - FA305E3.Accountant Sr</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2100652.000.101060000.113604000.0000</td>
<td>113604000</td>
<td>8103020</td>
<td>Salary</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2100652.000.101060000.113604000.0000</td>
<td>113604000</td>
<td>8103020</td>
<td>Benefits</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add a new distribution</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Insert Employee/Assignment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>113604000.00301.031001 - FA305E2.Accountant</td>
<td>8103020</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1057295 - FA305E2.Accountant</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2100652.000.101060000.113604000.0000</td>
<td>113604000</td>
<td>8103020</td>
<td>Salary</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2100652.000.101060000.113604000.0000</td>
<td>113604000</td>
<td>8103020</td>
<td>Benefits</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This Distribution is charged to an external Org. Please coordinate changes with Org owner.
This Position is Under/Over funded
This Position has both percent and dollar adjustments
Axiom Software – Labor Planning Module

• Roster Worksheet
  • Permanent Positions
    • Occupied
    • Vacant
    • New
  • Permanent Assignments (01, 03, 07, 12 & 17) Assignment Categories
    • Current
    • New
• Allocations (Assignment Level Funding)
  • Current
  • New
Axiom Software – Labor Planning Module

• Pooled Worksheet
  • Seasonal/Temporary Positions (02, 04, 06, 11, 21, Assignment Categories)
    • Current
    • New
  • Allocations
    • Current
    • New
Axiom Software – Labor Planning Module

• External Worksheet
  • View
    • Assignments funded outside Organization Plan File
Axiom Software – Labor Planning Module

• Other Comp Worksheet
  • Input Miscellaneous Salary & CFB Objects not accounted for on Roster, Pooled or External Worksheets
• View
  • Labor Plan File Summary by Account
# Axiom Software – Plan File Basics

## Budgeting Plan File Worksheets

![Screenshot of Axiom Software's Budgeting Plan File Worksheets]

The screenshot above illustrates the Budgeting Plan File Worksheets within Axiom Software. This feature allows for detailed financial planning and tracking, including budgeting and managing expenses for various categories such as salaries, wages, benefits, and supplies. The interface provides a comprehensive view of financial data, enabling users to make informed decisions and adjustments as needed.
Axiom Software – Operating Budget Module

• Budget Plan Worksheet
  • Operating Expenses by Object Code
  • Revenue by Object Code
  • View
    • Labor Plan File data by ASBOF (GL Account)
    • Budgeted Transfers by ASBOF (GL Account)
    • Total Budgeted dollars by ASBOF (GL Account)
Axiom Software – Operating Budget Module

• Transfer Worksheet
  • Transfers In
  • Transfers Out
  • Confirm Pending Transfers
  • View Approved Transfers
Axiom Software – Demo

• Labor Planning
  • Review Current Positions/Assignments/Allocations
  • Insert New Position
  • Create New Position
  • Apply Global Adjustment
  • Apply Manual Adjustment
  • Insert New Allocation Account
  • Adjusted Pooled Positions
  • Review External Funded Assignments
  • Input New Salary/CFB Object Codes
Axiom Software – Demo

• Operating Budget
  • Review Expense Object Codes
  • Apply Global Adjustment
  • Apply Manual Adjustment
  • Insert New Object Code
  • Insert New Category

• Transfer Module
  • Create New Transfer
  • View Pending Transfers
  • Confirm Transfers
  • View Approved Transfers
Axiom Software – Things to Remember

- Access and Security is set at the School/VP level; once access granted “user” may update and save all organizational plan files
- Each Organizational Plan File requires action (Labor Planning & Operating Budget Modules)
  - **Labor Planning Module** defaults to current occupants base salary & allocations as the FY 2018/2019 starting point
  - **Operating Budget Module** defaults to a “Zero Based” starting point
- Transfers must be “Confirmed” on both ends before transfer will be budgeted
- Transfers to **Dummy** accounts must be “Confirmed” by Budget Administration
- “Refresh” restores current display to last saved data
- Updates must be “Saved” before changes are made in the database “tables”
- Each Organizational Plan File requires at least one level of School/VP review and approval
Axiom Software – Further Assistance

• Hands-On Training/Practice Session
  • Immediately following this training (AB B60)

• Budget Administration
  • budgetadmin@uab.edu
  • (205) 934-4118

• User Clinics
  • Every Thursday (2:00 p.m. – 3:30 p.m.) during Budget season
    • AB B60 Electronic Classroom