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

Transfers Module

Operational Budget Module and Transfer Module “User” role grants **full** functional access
Axiom Software – Budget Planning Modules Access

Labor Planning Module “User” role grants full functional access

Labor Planning Module
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
# Budget Planning Modules Security

## Module security grants access to **ALL** org codes within the School/VP Oracle Org Range

<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>050000000-069999999</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>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>
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<tr>
<td>COLLAT SCHOOL OF BUSINESS</td>
<td>420000000-429999999</td>
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<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>
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<tr>
<td>HONORS COLLEGE</td>
<td>520000000-529999999</td>
</tr>
<tr>
<td>HEALTH SYSTEM</td>
<td>690000000-699999999</td>
</tr>
</tbody>
</table>
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
Modules Process Management (Workflow)

1st School/VP – Update/Review & Approval
Return to Previous Step or Advance to Next Step in the Approval Path

2nd – 4th School/VP – Update/Review & Approvals (Optional)
Return to Previous Step or Advance to Next Step in the Approval Path

User Role = Data Entry

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
# 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
Install / Launch Application

Web Client

Windows Client

Excel Client

SYSTEM NAME
University of Alabama at Birmingham

› Download
› Axiom Software Info
› Installed Products

Tools & Add-ins

Initial Launch Window Client Install Wizard

Forms

Web Reports

Table Manager

Data Explorer
Axiom Software – Windows Client

Ribbon
Axiom Software – Windows Client

**Labor Planning 2019**
- Plan File = Organization Code
  - Positions
  - Assignments
  - Allocations (Funding)
  - External Funded Assignment

**Budgeting 2019**
- Plan File = Organization Code
  - ASBOF (GL Account Strings)
    - Revenue
    - Operating Expense
    - Transfers
User Save = Update database information
Axiom Software – Windows Client

Approver 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)
Axiom Software – Windows Client

Refresh = Reset display back to the last saved information
Open “Plan File” Tabs
Axiom Software – Plan File Basics

Green Fields = Selection List Drop Down
Blue Fields = Data Entry/Update
Axiom Software – Plan File Basics

Labor Plan File Worksheets
Axiom Software – Labor Planning Module

• **Roster (Permanent) 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

• Non-Perm Roster (Temporary/Seasonal) Worksheet
  • Temporary/Seasonal Positions
    • Occupied
    • Vacant
    • New
  • Temporary/Seasonal Assignments (04, 06, 11, & 21 Assignment Categories)
    • Current
    • New
  • Allocations (Assignment Level Funding)
    • 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
### Budgeting Plan File Worksheets

**File: SVMR-MAIN**

#### Axiom Software – Plan File Basics

### Budgeting Plan File Worksheets

**The University of Alabama at Birmingham**

Knowledge that will change your world

**113004030 - SURPLUS WAREHOUSE**

#### SURPLUS WAREHOUSE

**SALARIES, WAGES & BENEFITS**

<table>
<thead>
<tr>
<th>ASGC</th>
<th>Description</th>
<th>Actual</th>
<th>Budget</th>
<th>Revised Budget</th>
<th>Actual YTD Mar</th>
<th>Calc Method</th>
<th>Starting Point</th>
<th>Base</th>
<th>%</th>
<th>$ Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>810109</td>
<td>SAL-ENG ADMIN MANAG</td>
<td>8,214</td>
<td>11,801</td>
<td>11,801</td>
<td>5,881</td>
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<td></td>
<td></td>
<td>11,802</td>
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<td>810300</td>
<td>SAL-PROF NOMIC ADMIN</td>
<td>55,753</td>
<td>54,874</td>
<td>54,874</td>
<td>27,417</td>
<td>From Labor</td>
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<td></td>
<td>55,971</td>
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<tr>
<td>810410</td>
<td>SAL-SKILLS CLER ADMIN</td>
<td>89,700</td>
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<td>93,159</td>
<td>47,424</td>
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<td>819102</td>
<td>GRP-BC COMP FR BENEFITS</td>
<td>23,589</td>
<td>23,589</td>
<td>23,589</td>
<td>11,821</td>
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<td>23,924</td>
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<tr>
<td>819103</td>
<td>GRP-CC COMP FR BENEFITS</td>
<td>138,847</td>
<td>138,847</td>
<td>138,847</td>
<td>16,788</td>
<td>From Labor</td>
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<td>27,961</td>
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<td>Total Salaries, Wages &amp; Benefits</td>
<td>207,382</td>
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<td>216,415</td>
<td>109,351</td>
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<td>118,868</td>
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</table>

**SUPPLIES**

<table>
<thead>
<tr>
<th>ASGC</th>
<th>Description</th>
<th>Actual</th>
<th>Budget</th>
<th>Revised Budget</th>
<th>Actual YTD Mar</th>
<th>Calc Method</th>
<th>Starting Point</th>
<th>Base</th>
<th>%</th>
<th>$ Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>820109</td>
<td>SUPP-OTHER OFF ADMIN</td>
<td>172</td>
<td>0</td>
<td>0</td>
<td>25</td>
<td>Input Adjustment</td>
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<tr>
<td>820300</td>
<td>SUPP-OTHER OFF SUPPL</td>
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<td>0</td>
<td>0</td>
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<td>820920</td>
<td>SUPP-SIGNAGE</td>
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<td>0</td>
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<td>Total Supplies</td>
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**TRAVEL/TRAINING**

<table>
<thead>
<tr>
<th>ASGC</th>
<th>Description</th>
<th>Actual</th>
<th>Budget</th>
<th>Revised Budget</th>
<th>Actual YTD Mar</th>
<th>Calc Method</th>
<th>Starting Point</th>
<th>Base</th>
<th>%</th>
<th>$ Total</th>
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</thead>
<tbody>
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<td>830109</td>
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<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Total Travel/Training</td>
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<td>0</td>
<td>0</td>
<td>34</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Notes:**

- Budget Plan Transfers

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*Image of a software interface with a focus on budgeting plan file worksheets.*
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
  • 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