

Web Client Navigation

All major Axiom files and features can be accessed using the Axiom tab on the ribbon. The specific groups and features available on the menu depend on your security settings.

The screenshot shows the Axiom web client interface. The ribbon at the top includes 'File', 'MAIN', and 'Home' tabs. The 'Home' tab is active, showing options like 'Save', 'Refresh', 'Quick Filter', 'Print', 'Show Home', 'Formula Bar', 'Help', and 'Close Axiom Software'. The 'Reports' group is expanded, showing 'Budget Request 2021', 'Budget Request 2022', 'Budget Request 2023', 'Budgeting 2021', 'Budgeting 2022', 'Budgeting 2023', 'Labor Planning 2020', 'Labor Planning 2021', 'Labor Planning 2022', and 'Labor Planning 2023'. The 'Libraries' group is also expanded, showing 'Reports Library', 'Table Library', 'Task Panes Library', and 'Ribbon Tabs Library'. The main content area displays a table titled 'Budget Planfile' with columns for 'BUDGETING', 'LABOR PLANNING', and 'BUDGET REQUESTS'. The table lists various organizational units and their 2022 budgets.

BUDGETING	LABOR PLANNING	BUDGET REQUESTS
Budget Planfile		2022 Budget
ORG 411000: Administration		\$320,871
ORG 412000: Human Resources		\$148,567
ORG 413000: Plant Operations		\$945,729
ORG 421000: Business & Finance		\$637,727
ORG 422000: Auxiliary Operations (Bond Pledged)		\$237,382
ORG 423000: Resale Operations		\$39,500
ORG 424000: Plant Fund Operations		\$1,573,898

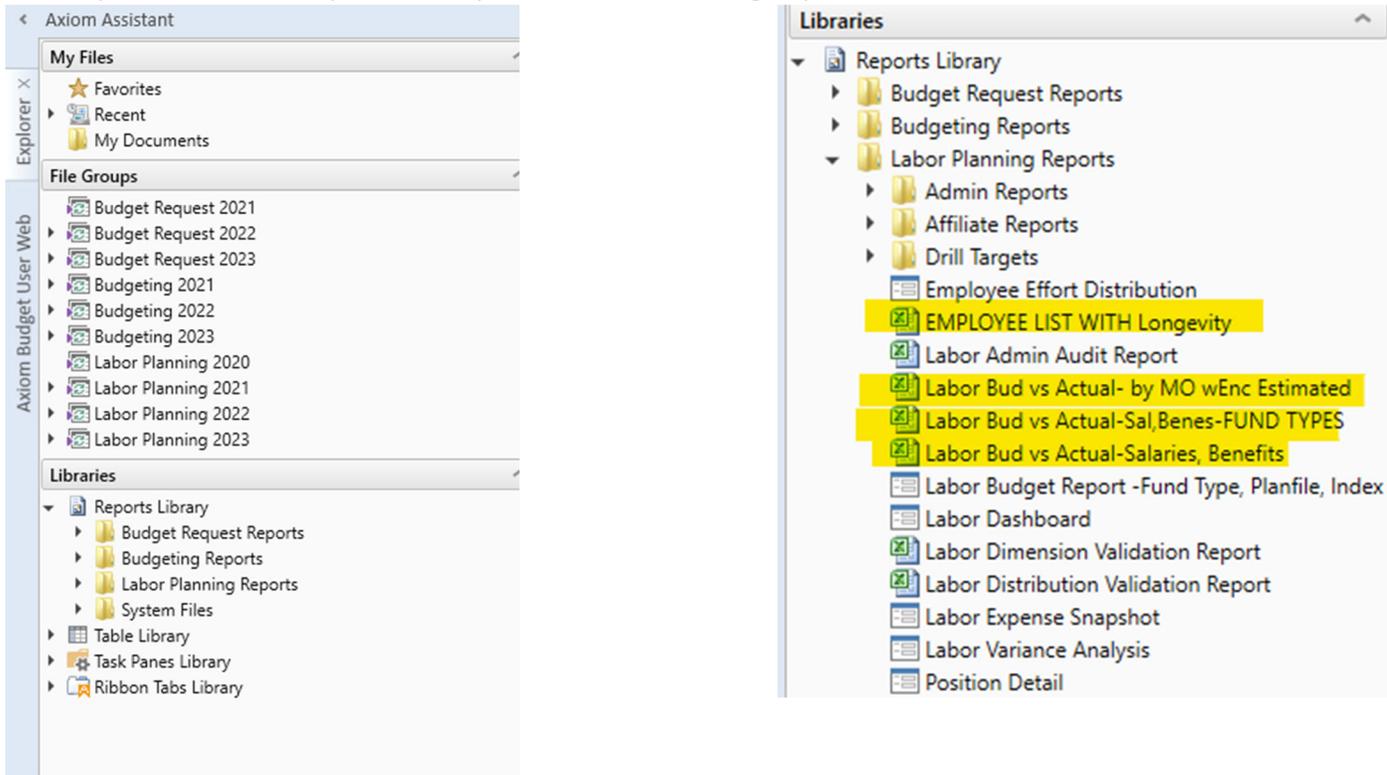
Reports can be accessed from the ribbon or in the Explorer Task Pane.

PLEASE NOTE: Nearly ALL of the reports filter out "5C and "3C" as a rule.

The screenshot shows the Axiom web client interface with the 'Reports' menu open. The menu options are: 'All Reports', 'Intelligence Center', 'Refresh File System', 'Reports Library', 'Budget Request Reports', 'Budgeting Reports', 'Labor Planning Reports', 'Admin Reports', 'Affiliate Reports', and 'Drill Targets'. The 'Reports Library' is expanded, showing 'Budget Request Reports', 'Budgeting Reports', and 'Labor Planning Reports'. The 'Budget Request Reports' is further expanded, showing 'Budget request 2021'.

Reports – Navigation and Descriptions.

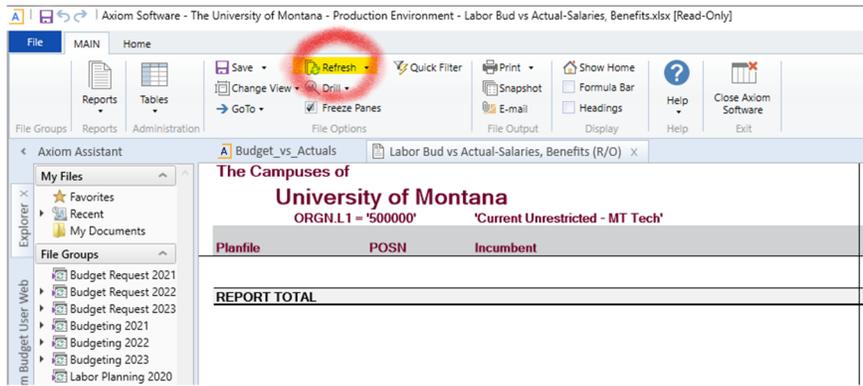
Labor Reports are in the Reports Library under Labor Planning Reports:



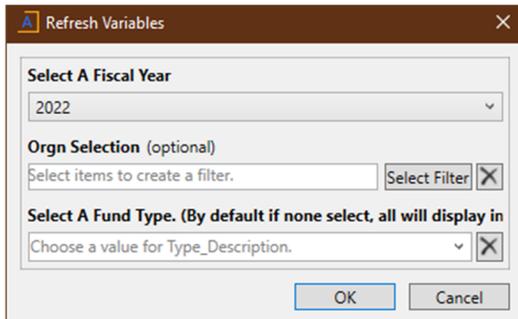
There are three reports highlighted:

1. **EMPLOYEE LIST WITH Longevity** – this report is new, it is filtered by your Planfile.
2. **Labor Bud vs Actual by MO w/Enc. Estimated** – Note the word “Estimated”. This report was developed with the assumption that labor costs will be fairly uniform throughout the rest of the year (June expenses were equal to December with the exception of Faculty). The “factor” or “scheduled hours worked” was also used to calculate the estimated wages for the rest of FY22 by eliminating those expenses in June. (i.e. faculty with 1520 hours). The rest of the salaries were estimated by equaling them to the months prior based on the number of pay periods that would post in that month. Note, this is probably not going to apply to your student employees. Hence, the word, “Estimated” in the title of the report.
3. **Labor Bud vs Actual-Salaries, Benefits** – The filters on this report allows the user to select a single fund type and then multiple funds of that fund type.
4. **Labor Bud vs Actual-Sal, Benes-FUND Types** - This report has filters to allow the user to select multiple fund types.

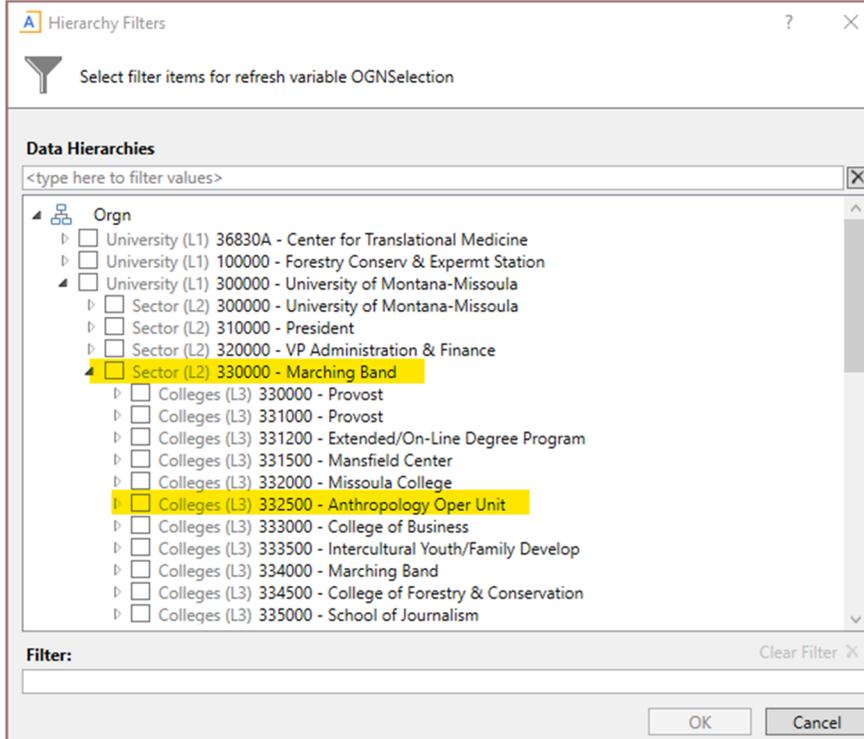
Double click on the report to open. You will receive a blank report that looks like the following:



Refresh is your friend. You will use this feature to populate the data in each report. Click on Refresh (circled in red above). This is located on the Axiom Ribbon in the File Options Section.



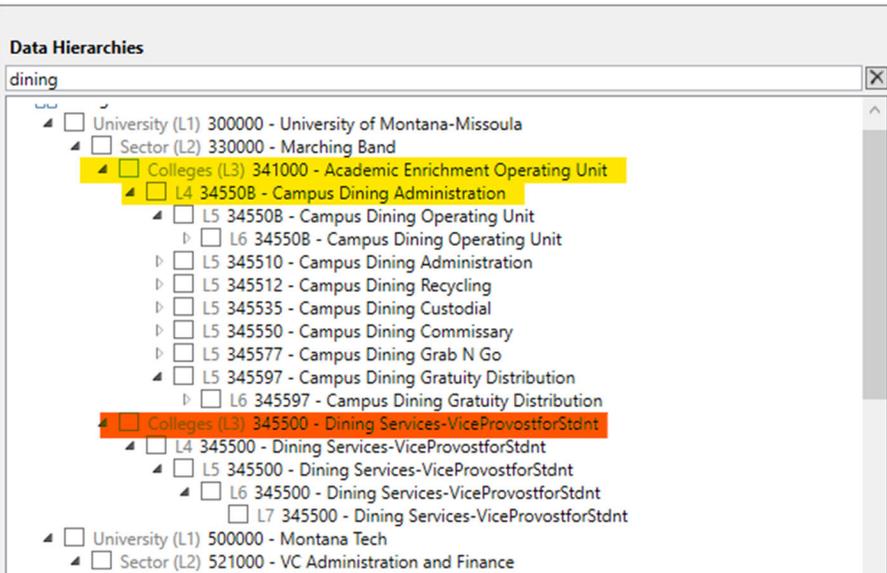
A Refresh Variables pop up box will appear, click on the Orgn Selection to view a hierarchical filter.



D { lrp #kdv#d#hfkqIfd#vxn# wk#hjdugv#r#
 wk#h#dp hv#kdw#krz #s# wk#ndfk#R uj #g#k#h#
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 R UJ #xp eh#v#r#l#h#r#v###
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 F r#djhv#06,#65833#, #Dqwkursr#r#j | #R shu#
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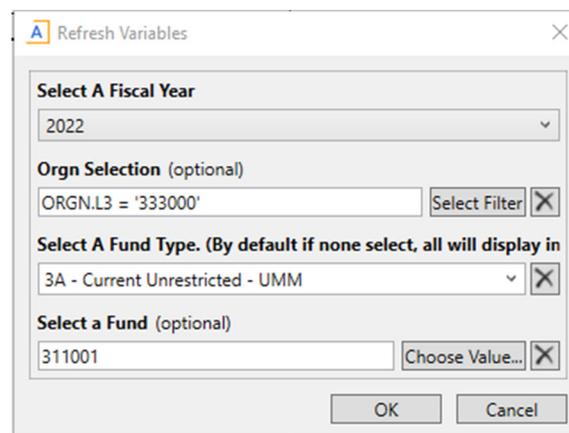
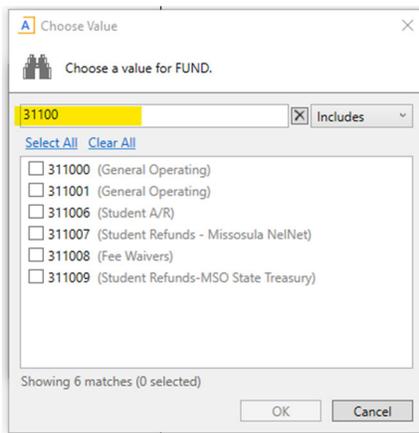
If you want to utilize the "<type here to filter values>" search box, you can type a word or an Org #. Be careful here, there are sometimes duplicates due to reorganizations at UM.

Select filter items for refresh variable ORGNSelection



In the search for “dining”, you will see the current hierarchy and past hierarchy. Currently, Dining falls below the Orgn Level 3, 341000. In prior years, the Vice Provost for Student Affairs was an Orgn Level 2 and the dining operation was an Orgn Level 3 instead of an Orgn Level 4, 34550B. It is important to get to know where your active Orgn is located in the hierarchy and your Orgn Number. If you know your Orgn number, the search provides a more defined search result for quick navigation.

The next optional filter is Fund Type (this is drop down menu, you can only select one fund type). If selected, the Select a Fund parameter will appear. Click on Choose Value and then type in the box to search for a specific fund you can select more than one fund. Check the box next to the fund you would like to select and click OK.



PLEASE NOTE: The Labor Budget reports on the web are not useful. They are designed to be used during the budget cycle/workflow.

The report named “Labor Bud vs Actual-Sal, Benes-FUND Types” allows the user to select multiple fund types, however the “Select a Fund” option will not appear in this report.

Another feature of this report is the Quick Filter. This will allow you to filter the report based on Key Columns that are contained within the data. The following is an example of the quick filter:

Open a report and filter your data.

The Campuses of University of Montana

Planfile POSI

REPORT TOTAL

Refresh Variables

Select A Fiscal Year
2022

Orgn Selection (optional)
ORGN.L4 = '34550B' Select Filter X

Select A Fund Type. (By default if none select, all will display in create)
Choose a value for Type_Description. X

OK Cancel

On the Axiom Ribbon, next to your friend, "Refresh" is "Quick Filter".

File MAIN Home

Save Refresh **Quick Filter** Print Show Home

Change View Drill Snapshot Formula Bar Help

GoTo Freeze Panes E-mail Headings Close Axiom Software

File Groups Reports Administration File Options File Output Display Help Exit

Axiom Assistant A Budget_vs_Actuals Labor Bud vs Actual-Salaries, Benefits (R/O) x

A Quick Filter window will open.

Quick Filter ? X

Edit the Quick Filter for the active sheet or workbook.

Apply Filter To: Workbook Active Sheet

View by: Folder Simple Filter

Filter <type here to filter list> X

- Dimensions
 - ACCT
 - Labor Planning
 - Dimensions
 - LABOR_EMPLOYEE
 - LABOR_POSITION
 - LABOR_POSITION
 - Description
 - PlanningCategory
 - POSITIONCATEGORY

Filter <type here to filter values> X

-
- Classified_Pooled
- Classified
- ContractAdmin_Pooled
- ContractAdmin
- ContractProf_Pooled
- ContractProf
- Faculty_Pooled
- Faculty
- Other_Pooled
- Students
- Temporary_Pooled

Showing 13 values (1 selected)

Preview: LABOR_POSITION.PlanningCategory = 'Classified'

Filter: Apply

OK Cancel

Expand the Dimensions or Labor Planning to see available quick filters. In this example, the filter is under Labor Position, Planning Category and the Classified category is checked. The selection will preview in the lower section of the window. **You must click "Apply".**

After applying the filter, it will show in the "Filter:" section. You can click on the small "x" to remove the filter and start again.

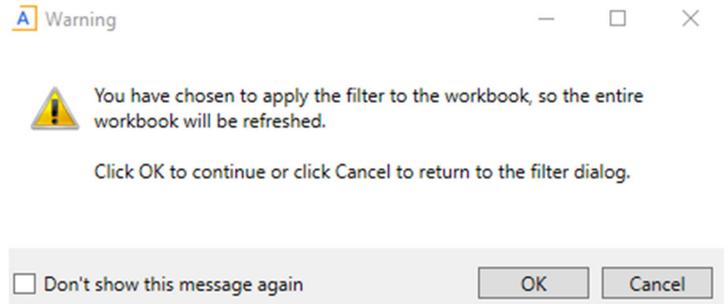
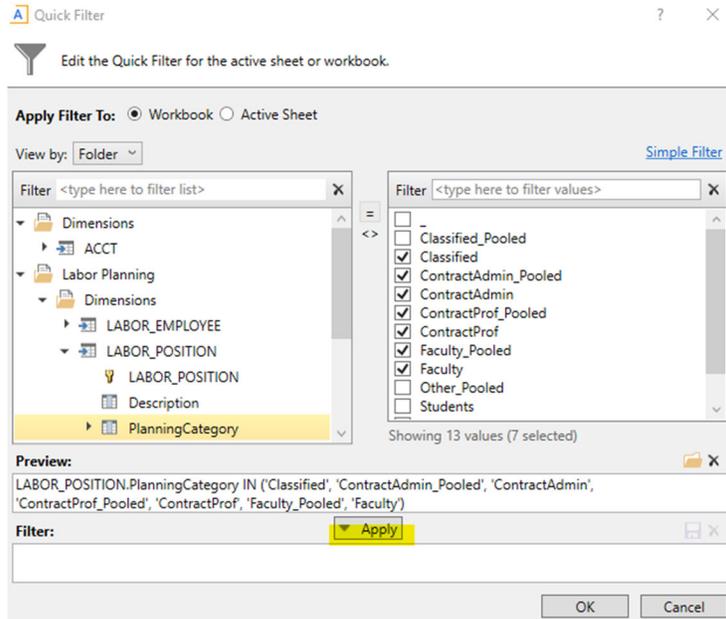
Preview:

Filter: Replace AND OR X

LABOR_POSITION.PlanningCategory = 'Classified'

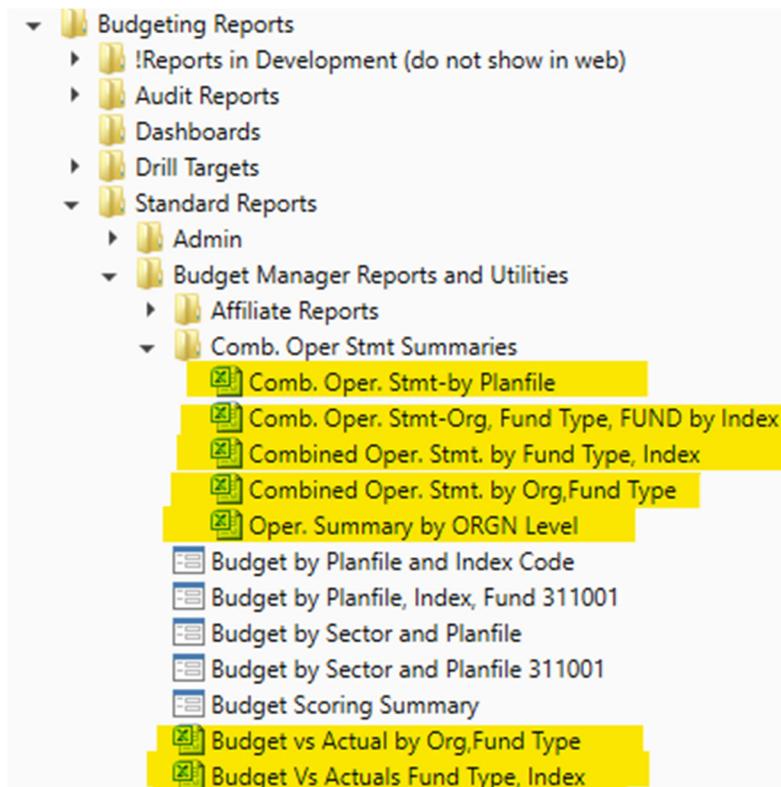
OK Cancel

Below is another example of what you could select to view all employees that might be eligible for a pay plan increase. Again, you need to click Apply to move the preview into the Filter Section. Then click OK. Another window will appear, click ok and then your refresh variables will reappear. You change them or leave them.



Click "OK" and the positions in the categories selected will be filtered in your report.

Under Budgeting Report, Standard Reports, you can also use the excel based reports for budget vs. actual information



All of the highlighted reports above use the hierarchy filter. If you run the Operating Statement that drills down to index, and get an error, you may have picked an Org that has a massive number of indexes. In that case, please choose a lower Org.

Budget vs Actuals Reports – do not include encumbrances:

1. Budget vs Actual by Org, Fund Type – Simple Budget vs Actual Variance Report, allows multiple fund type selection and includes the Orgn Hierarchy filter. Columns by Fund Type.
2. Budget vs. Actuals Fund Type, Index – Simple Budget vs Actuals Variance Report, allows multiple fund type selections and includes the Orgn Hierarchy filter. Columns by Index.

Combined Operating Statement Reports – include Encumbrances

1. Comb. Oper. Stmt. By Planfile – High level report for Orgn Level 1 or Level 2.
2. Comb. Oper. Stmt.- Org, Fund Type, Fund by Index – Allows only one Fund Type and then a specific fund or funds. Columns by Index.
3. Combined Oper. Stmt. By Fund Type, Index – Allows multiple fund selections, Columns by index.
4. Combined Oper. Stmt. By Org, Fund Type – Allows only one Fund Type, leave blank to see all Org Types, mostly used for high level analysis.
5. Oper. Summary by ORGN Level – Select an Organization Level and the report will show a high-level operating summary for each account category for the Org's below the level selected by the user. Fund Type is required.

Please contact our office with any questions or concerns. Email: cindy.johnson@umontana.edu phone: 406-243-6340.