Axiom Budgeting System Training
Process Management Overview

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Knowledge that will change your world

Axiom Software – Process Management Overview

- Organizational Plan Files (Labor and Budget) User & Approval security is set at the School/VP Oracle Org Code Range.

- Approvers may review, update and approve Organizational Plan Files based upon their assigned Module (Labor & Budget) access and School/ VP Security

Approval Security

School/Unit		Oracle Org Range
GENERAL UAB ADMINISTRATION		010000000-019999999
INSTITUTIONAL		020000000-029999999
UAB ARTS		060000000-069999999
ATHLETICS DEPARTMENT		090000000-099999999
PRESIDENT		100000000-109999999
VP FINANCIAL AFFAIRS & ADMIN		110000000-110999999
ASSOC VP BUSINESS SERVICES		111000000-111999999
ASSOC VP FACILITIES		112000000-112999999
ASSOC VP FINANCIAL AFFAIRS		113000000-113999999
ASSOC VP HUMAN RESOURCES		114000000-114999999
VP RESEARCH & ECONOMIC DEVELOPMENT		120000000-129999999
VP DIVERSITY, EQUITY & INCLUSION		130000000-139999999
VP STUDENT AFFAIRS		140000000-149999999
CCO UNIVERSITY RELATIONS		170000000-179999999
VP DEVELOPMENT & ALUMNI		180000000-189999999
VP FOR INFORMATION TECHNOLOGY		190000000-199999999
PROVOST		200000000-279999999
UAB LIBRARIES		230000000-239999999
LISTER HILL LIBRARY OF HLTH SCIENCES		280000000-289999999
MERVYN H STERNE LIBRARY		290000000-299999999
SCHOOL OF MEDICINE	ACADEMIC JOINT DEPARTMENTS	310000000-319999999 390000000-399999999
SCHOOL OF DENTISTRY		320000000-329999999
SCHOOL OF OPTOMETRY		330000000-339999999
SCHOOL OF NURSING		340000000-349999999
SCHOOL OF HEALTH PROFESSIONS		350000000-359999999
SCHOOL OF PUBLIC HEALTH		370000000-379999999
COLLAT SCHOOL OF BUSINESS		420000000-429999999
SCHOOL OF EDUCATION		430000000-439999999
SCHOOL OF ENGINEERING		440000000-449999999
COLLEGE OF ARTS & SCIENCES ADMIN		480000000-489999999
GRADUATE SCHOOL		510000000-519999999
HONORS COLLEGE		520000000-529999999
HEALTH SYSTEM		690000000-699999999

Process Management (Workflow)

Step One: User Data Entry

Remain at Current Step (Open) or Advance to Next Step in the Approval Path (Locked for User Update)

Axiom Software – Process Management

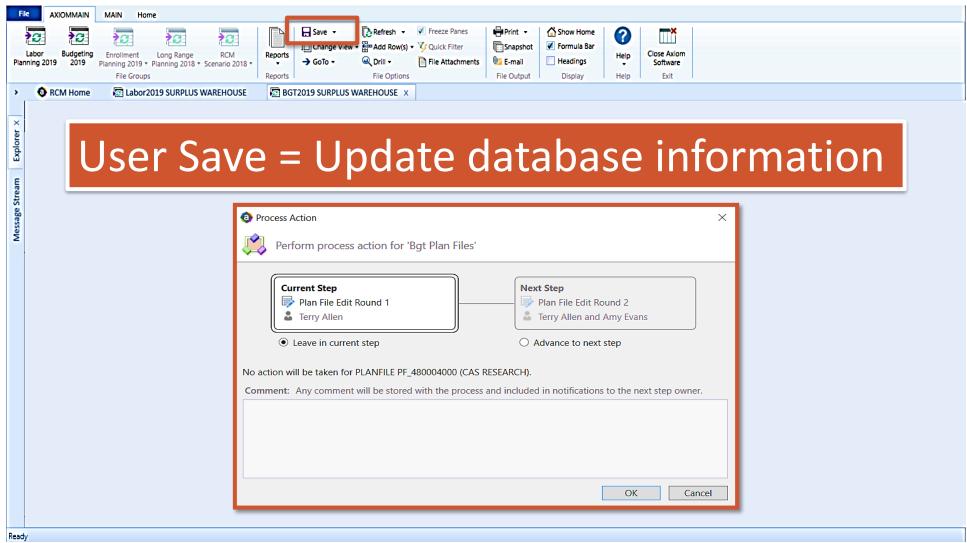User Save = Update database information

Process Management (Workflow)

Step One: User Data Entry

Remain at Current Step (Open) or Advance to Next Step in the Approval Path (Locked for User Update)

Step Two: 1st School/VP Review, Update & Approve

Return to Previous Step (User) or Remain at Current Step (Open) or

Advance to Next Step in the Approval Path (Locked for all previous Steps Update)

Axiom Software – Process Management

Notifications tab shows in orange when "NEW" notification need to be addressed

Axiom Software – Process Management

"Action" Notifications display in the **"Axiom Assistant"**

"New" notifications display in **"Bold"**

Axiom Software – Process Management

Open Notification Display

My Notifications

Bgt Plan Files   5 days ago
process notification - 1 new task(s)

You have 1 new task(s) in process 'Bgt Plan Files'.

Please login to Axiom Software to complete your tasks.
Process task for PLANFILE PF_480400000 (CHEMISTRY)
Process Step Name: Edit Round 2
Description:
Due Date: No due date
Plan File: Budgeting 2019_PF_480400000.xlsx
Previous Submitter Name: Tim Bollinger Test
Process Comment:

Process Management Step (Round)

Open Plan File Link

Right click on notification to delete notification

Bgt Plan Files   6 days ago
process notification - 1 new task(s)

UAB Budgeting Home

Revenue	Expense	Total Allocation
66 (M)	65 (M)	50 (M)

Labor Reports
RCM Allocation Report
RCM Shadow Income Statement
RCM Metrics Report

Budget Reports
Data Definitions for Axiom Shadow Reports
UAB Responsibility Center Management

Labor Planning
0
undefined

Budgeting
0
undefined

Axiom Software – Process Management

Approver Save = Update database information
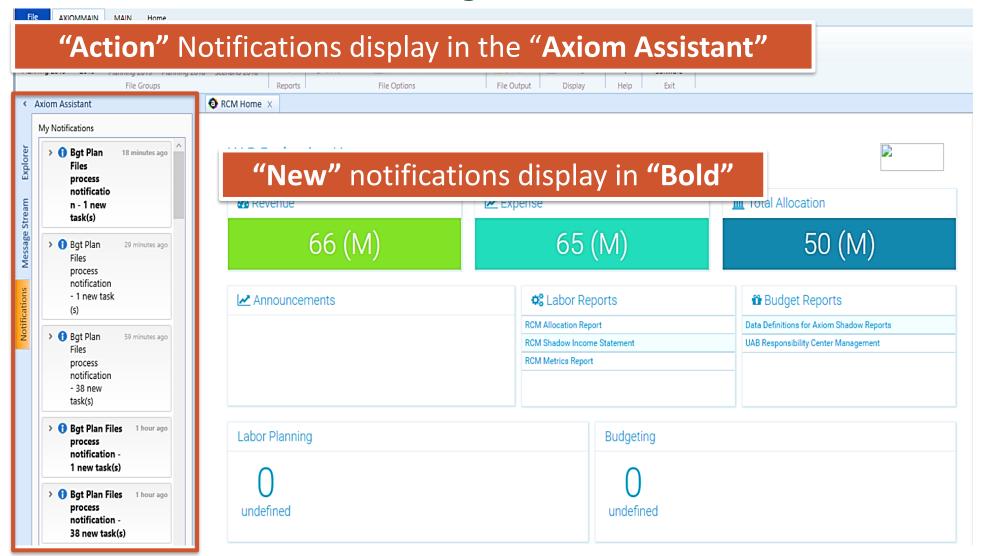
Process Management (Workflow)
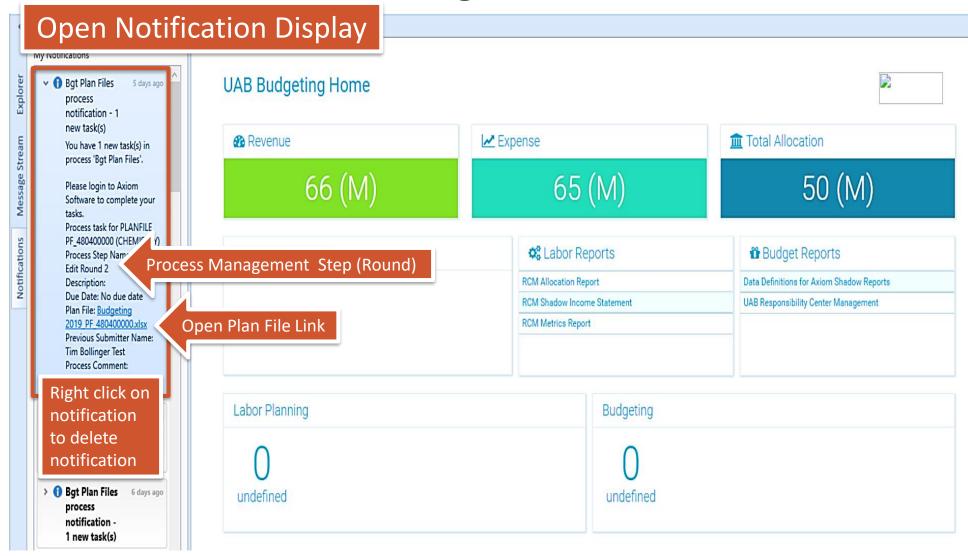
Step One: User Data Entry

Remain at Current Step (Open) or Advance to Next Step in the Approval Path (Locked for User Update)
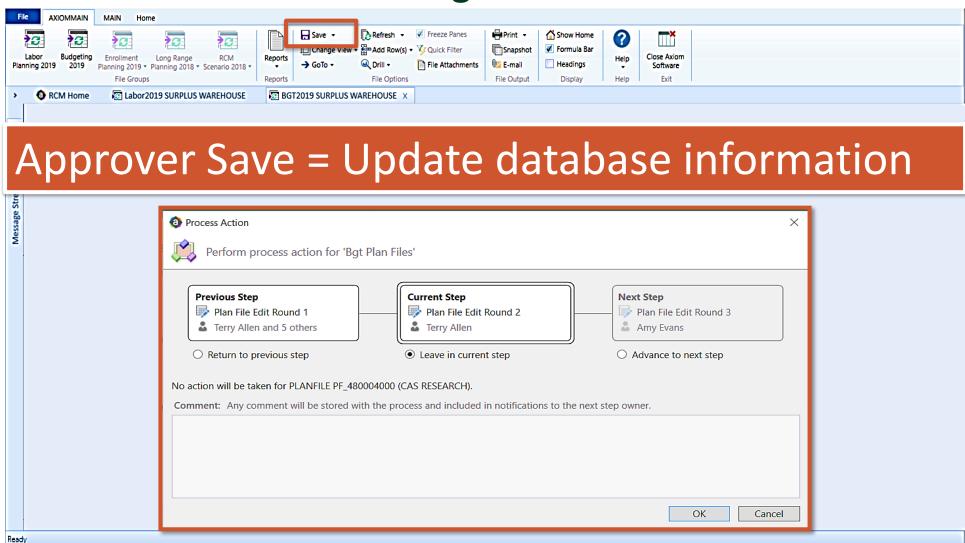
Step Two: 1st School/VP Review, Update & Approve

Return to Previous Step (User) or Remain at Current Step (Open) or

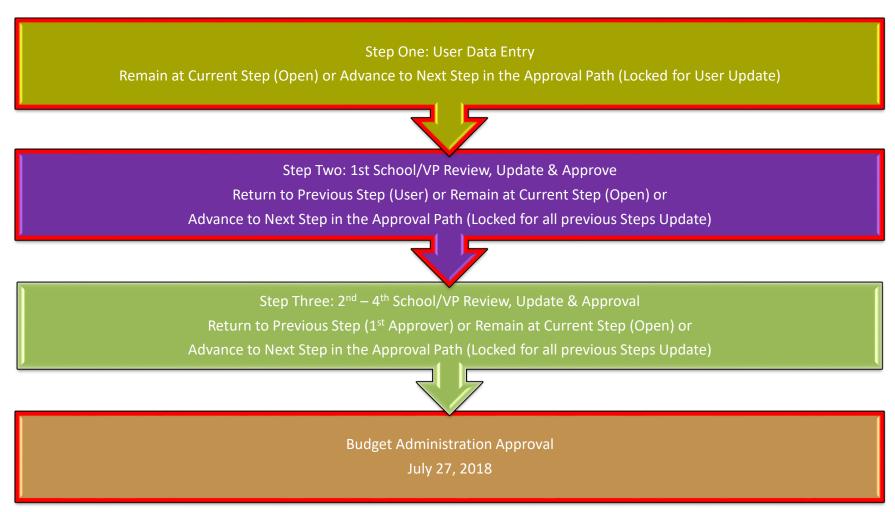Advance to Next Step in the Approval Path (Locked for all previous Steps Update)

Step Three: 2nd – 4th School/VP Review, Update & Approval

Return to Previous Step (1st Approver) or Remain at Current Step (Open) or

Advance to Next Step in the Approval Path (Locked for all previous Steps Update)

Budget Administration Approval

July 27, 2018

Axiom Software – Things to Remember

- All Approvers for each step will receive "Action" Notifications based upon School/VP security

- Each Organizational Plan File (Labor & Budget) requires action

- Organizational Plan File Access is restricted to "Read Only" for all **"prior steps"** once advanced onto the next step in Process Management

- Each Organizational Plan File (Labor & Budget) requires at least one level of School/VP review and approval

- Each Organizational Plan File must be in Budget Administration for final review and approval by July 27, 2018

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