

# Axiom Budgeting System Training Process Management Overview

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# 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	310000000-319999999
ACADEMIC JOINT DEPARTMENTS	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

The screenshot shows the Axiom Software interface with a 'Process Action' dialog box open. The dialog box is titled 'Process Action' and contains the following information:

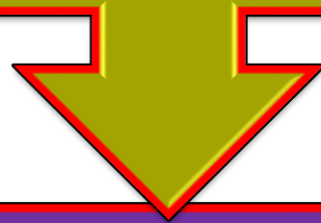
- Current Step:** Plan File Edit Round 1 (Owner: Terry Allen)
- Next Step:** Plan File Edit Round 2 (Owner: Terry Allen and Amy Evans)
- Options:**  Leave in current step,  Advance to next step
- Message:** No action will be taken for PLANFILE PF\_480004000 (CAS RESEARCH).
- Comment:** Any comment will be stored with the process and included in notifications to the next step owner.
- Buttons:** OK, Cancel

A large orange banner overlaid on the interface reads: **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

The screenshot displays the Axiom Software interface for UAB Budgeting Home. The top navigation bar includes 'File', 'AXIOMMAIN', 'MAIN', and 'Home'. Below this is a toolbar with various icons for actions like 'Save', 'Refresh', 'Quick Filter', 'Print', 'Show Home', 'Formula Bar', 'Help', and 'Close Axiom Software'. The main content area is titled 'UAB Budgeting Home' and features several data cards: 'Revenue' (66 (M)), 'Expense' (65 (M)), and 'Total Allocation' (50 (M)). Below these are sections for 'Announcements', 'Labor Reports', and 'Budget Reports'. A red callout box highlights the 'Notifications' tab in the left sidebar, stating: 'Notifications tab shows in orange when "NEW" notification need to be addressed'. At the bottom, there are two more cards: 'Labor Planning' and 'Budgeting', both showing '0 undefined'.

# Axiom Software – Process Management

The screenshot displays the Axiom Assistant software interface. A red callout box at the top states: "Action Notifications display in the Axiom Assistant". On the left, a vertical sidebar labeled "Axiom Assistant" contains a "My Notifications" section with five entries, each starting with "Bgt Plan Files process notification" and indicating the number of new tasks. A second red callout box points to the first notification, stating: "New notifications display in Bold". The main dashboard area features three large colored boxes for "Revenue" (66 M), "Expense" (65 M), and "Total Allocation" (50 M). Below these are sections for "Announcements", "Labor Reports" (with sub-items: RCM Allocation Report, RCM Shadow Income Statement, RCM Metrics Report), and "Budget Reports" (with sub-items: Data Definitions for Axiom Shadow Reports, UAB Responsibility Center Management). At the bottom, there are "Labor Planning" and "Budgeting" sections, both showing "0 undefined".



# Axiom Software – Process Management

**Open Notification Display**

The screenshot displays the Axiom Software interface. On the left, a 'My Notifications' sidebar shows a notification for 'Bgt Plan Files' with details such as 'Process Step Name: Edit Round 2' and a link to 'Budgeting 2019 PF\_480400000.xlsx'. Three red callout boxes are overlaid on the interface: one pointing to the notification title 'Process Management Step (Round)', another pointing to the file link 'Open Plan File Link', and a third pointing to the notification text 'Right click on notification to delete notification'. The main dashboard area, titled 'UAB Budgeting Home', features three large colored boxes for 'Revenue' (66 M), 'Expense' (65 M), and 'Total Allocation' (50 M). Below these are sections for 'Labor Reports' and 'Budget Reports'. At the bottom, there are two boxes for 'Labor Planning' and 'Budgeting', both showing '0 undefined'.

**Process Management Step (Round)**

**Open Plan File Link**

**Right click on notification to delete notification**

UAB Budgeting Home

Revenue: 66 (M)

Expense: 65 (M)

Total Allocation: 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

**File** AXIOMMAIN MAIN Home

Labor Planning 2019 Budgeting 2019 Enrollment Planning 2019 Long Range Planning 2018 RCM Scenario 2018

File Groups Reports Reports File Options File Output Display Help Exit

RCM Home Labor2019 SURPLUS WAREHOUSE BGT2019 SURPLUS WAREHOUSE X

**Save** Refresh Freeze Panes Print Show Home Help Close Axiom Software

Change View Add Row(s) Quick Filter Snapshot Formula Bar

GoTo Drill File Attachments E-mail Headings

Process Action

Perform process action for 'Bgt Plan Files'

**Previous Step**  
Plan File Edit Round 1  
Terry Allen and 5 others

**Current Step**  
Plan File Edit Round 2  
Terry Allen

**Next Step**  
Plan File Edit Round 3  
Amy Evans

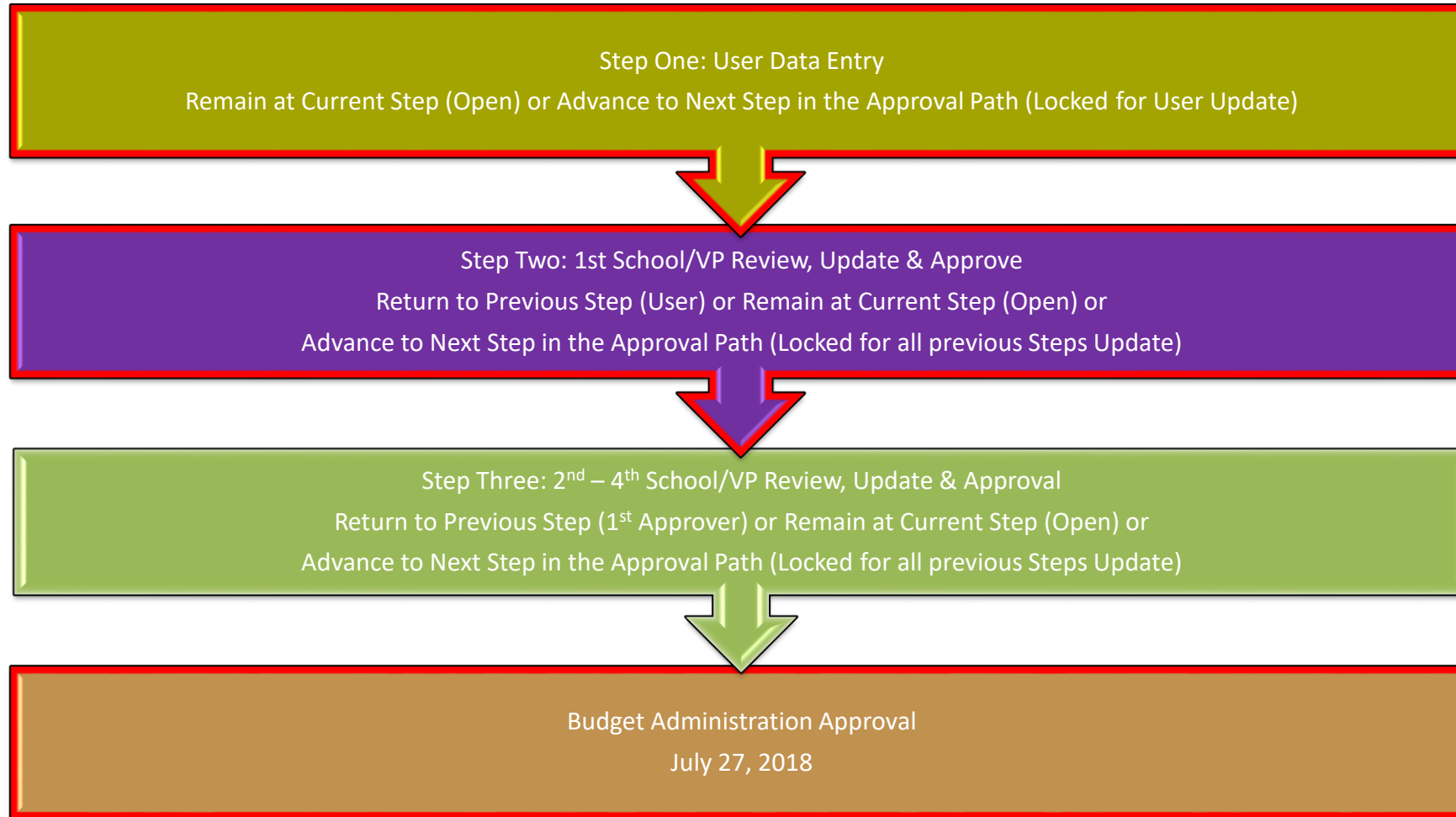
Return to previous step  Leave in current step  Advance to next step

No action will be taken for PLANFILE PF\_480004000 (CAS RESEARCH).

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

OK Cancel

# Process Management (Workflow)



# 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](mailto: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