Axiom login instructions – first time access

Table of Contents

Launching Excel Client for the first time in Axiom 2

Pre-training checklist 5

Axiom In Year Forecast 5

Quick Log-In Link to In Year Forecasting 5

Axiom Reports 9

Save report in Excel 10

Troubleshooting 12

Gray box appears and blocks content on screen 12

Installing Chrome Browser Extension for Axiom Excel Client *(optional)* 13

VSTO Installer 15

Help Resources 16

Launching Excel Client for the first time in Axiom

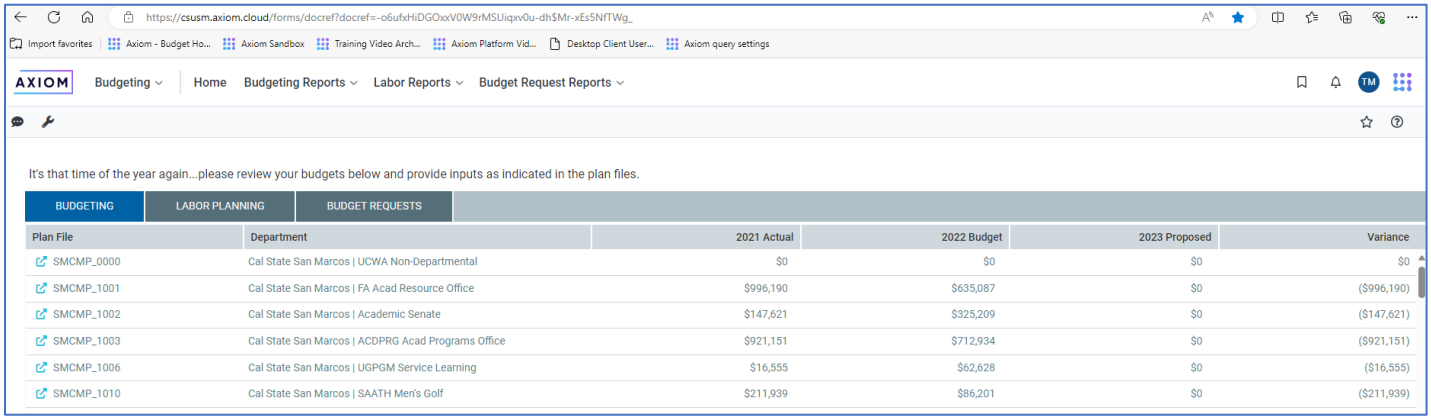
Please note that **Edge browser** **is *required*** for use with the Axiom system.



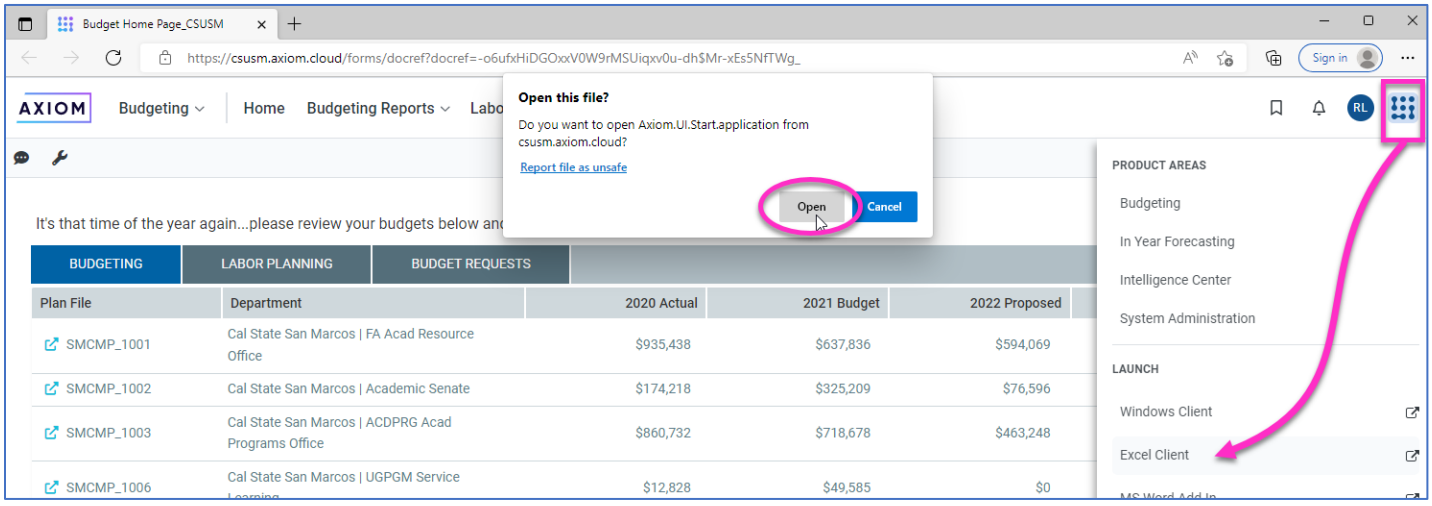
Start by opening the **Microsoft Edge browser** and copy and paste this link.

https://csusm.axiom.cloud

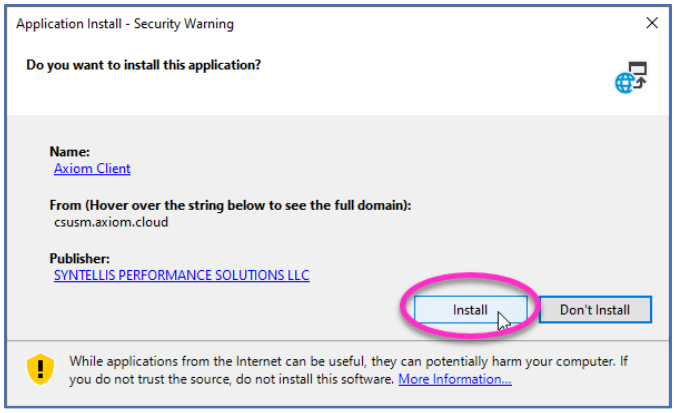
If **Microsoft Edge** is not your default browser, you will not be able to simply click the link but rather will need to paste it into the address line. You should be able to see something similar to this image:



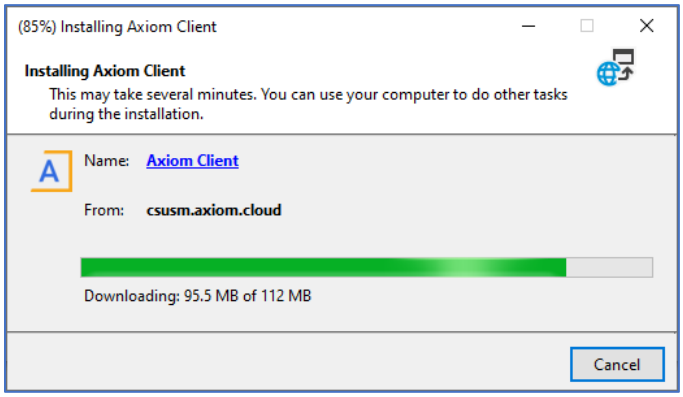
Launch Excel Client from Navigation Menu on right side of screen, waffle
And when popup asks to “Open this file” click Open



Windows System warning window will appear; click Install

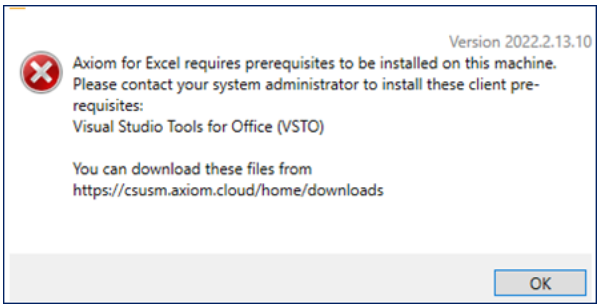


The Axiom Client will download and automatically install on your computer.

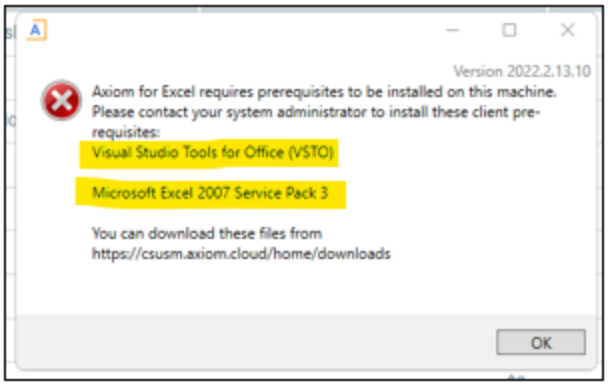


The Axiom Software home page in Excel will open and be ready to use.

Note: If the following error appears, installation of Visual Studio Tools for Office runtime (VSTO) is required. See VSTO Instructions.



It's possible that errors in addition to VSTO could be listed, indicating other updates are needed. You may attempt to follow the link in the error message to install downloads. If that fails due to needing Admin access, it will need to be resolved through IITS:



Please reach out to IITS directly for assistance: helpdesk@csusm.edu 760-750-4790

Once Axiom Excel Client is successfully installed:

Please review the following, additional instructions to ensure that you can access the areas that will be covered during the upcoming trainings. Let the Budget Office or FSO know if you need assistance.

Pre-training checklist:

- ✓ Able to log in to Axiom and access the In Year Forecasting screen
- ✓ Able to view all of the departments you manage in the Operating Fund
- ✓ Able to access forecasting pages for individual departments
- ✓ Able to enter data
- ✓ Able to save entries
- ✓ Able to access and run an Axiom Budget Report
- ✓ Please email budget@csusm.edu to confirm success

Axiom In Year Forecast

Quick Log-In Link to In Year Forecasting:

IYF Home Page (axiom.cloud)

It is recommended that you bookmark this page for future use.

Note: if Microsoft Edge is not your default browser, open Edge first, then copy/past the link into your browser (right click on link and "copy hyperlink" to copy)

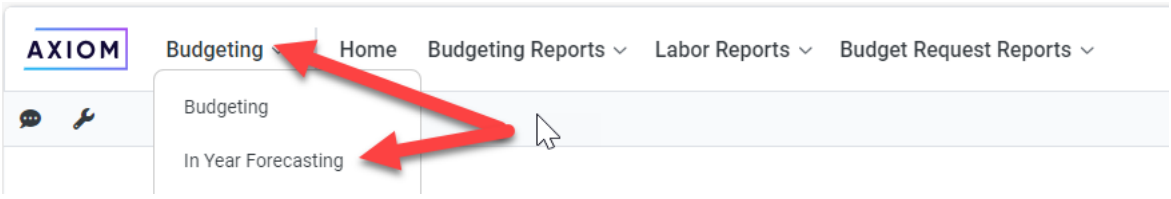
-or-

Open Axiom in Microsoft Edge and sign in using your CSUSM credentials.

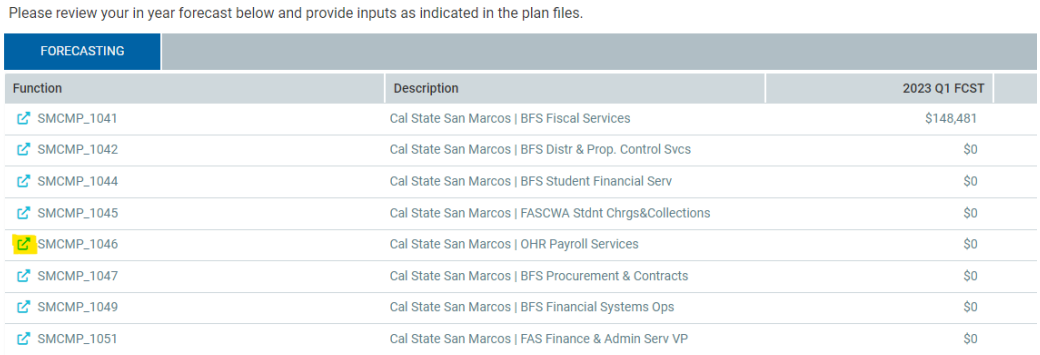
https://csusm.axiom.cloud/

It is recommended that you bookmark this page for future use.

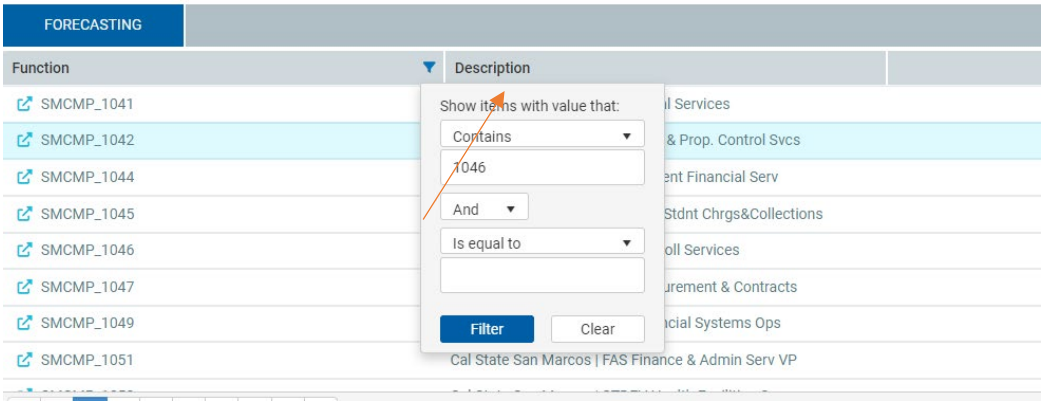
Then, navigate to In Year Forecasting.



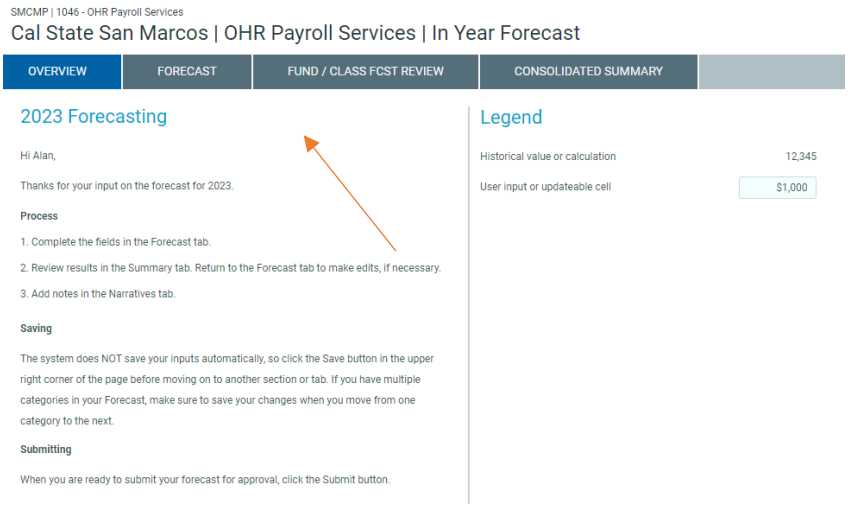
You should see all the departments that you manage, and no more (please let Budget or FSO know if this is not the case). Select a department by clicking on the arrow in front of the department number.



To search for a department, click the filter icon, select “Contains” in the first dropdown and enter the department number.



The In Year Forecast page for the department opens in the Overview tab. Select the Forecast tab.



The Forecast tab has many columns including the past 2 years of actual expenses, current budget, year to date actual expenses, actual expenses by month to date, projected expenses by month, encumbrance, budget balance available and comments. You will need to navigate to the right to see the empty cells where projected expenses by month can be entered for January through June.

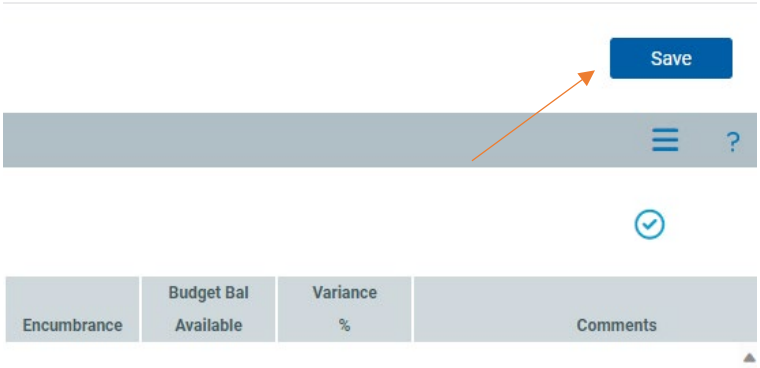
Budget Group	Forecast Method	January Forecast	February Forecast	March Forecast	April Forecast	May Forecast	June Forecast	Total Q
Revenues								
+ Add Revenues								
tal Revenues		0	0	0	0	0	0	
Personnel Expense								
601201 - Salaries MPP - Salaries MPP	Fcst Detail	0	0	0	0	0	0	
Enter Description Here	Detail Line 1	0	0	0	0	0	0	
Enter Description Here	Detail Line 2	0	0	0	0	0	0	
+ Add Detail								
601300 - Salaries Support Staff - Salaries Support Staff	Fcst Detail	0	0	0	0	0	0	
Enter Description Here	Detail Line 1	0	0	0	0	0	0	
Enter Description Here	Detail Line 2	0	0	0	0	0	0	
+ Add Detail								
601301 - Salaries SupStf Overtime-Salaries SupStf Over	Fcst Monthly	0	0	0	0	0	0	

Then, enter the projected expenses for each account listed for January through June.

Accounts such as “601201 – Salaries MPP” use a Forecast Method called “Fcst Detail” and can have additional detail lines entered as shown in the example above. For accounts such as “601301 – Overtime,” only a total monthly amount can be entered.

Note: Please split the projected expenses between January – June as relevant, do not enter all expenses into June, unless you plan to spend all remaining funds in the month of June.

After completing the department’s expenditure projects, click Save in the upper right corner.

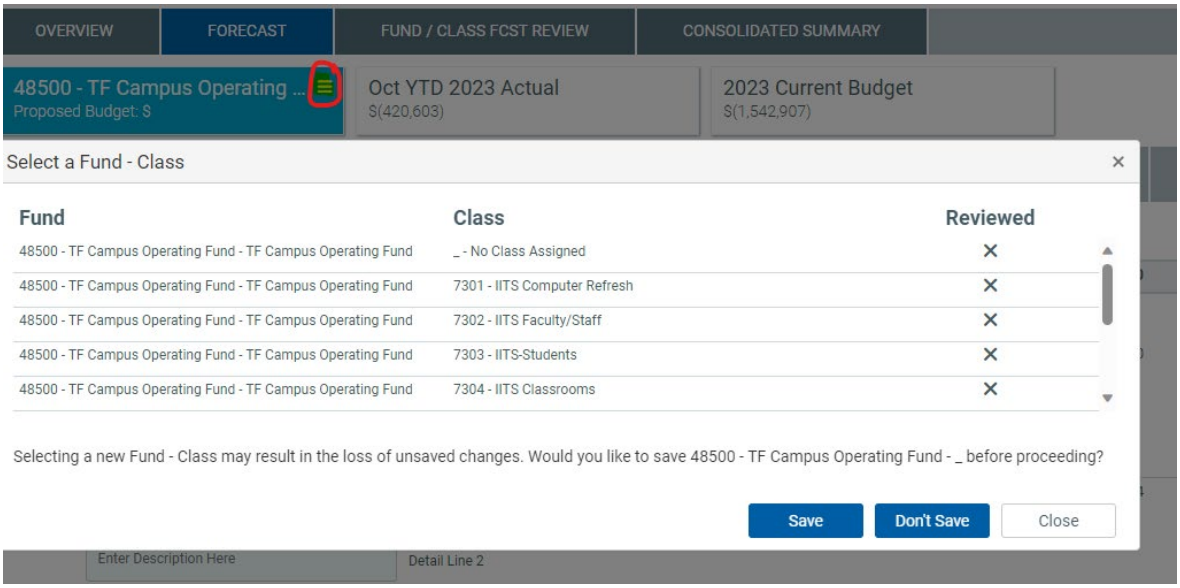


Additional Steps for Departments with Class Codes:

If the department uses class codes, data for other class codes can be viewed by clicking on the burger icon by the fund in the upper left corner as shown below. Select the class code you would like to view and click either <save> (to save data entered in prior screen) or <don't save> (to discard changes made to prior screen) to navigate to forecast screen for that class code. Clicking <close> will not select a class code, you will still see a forecast screen for "no class code assigned."

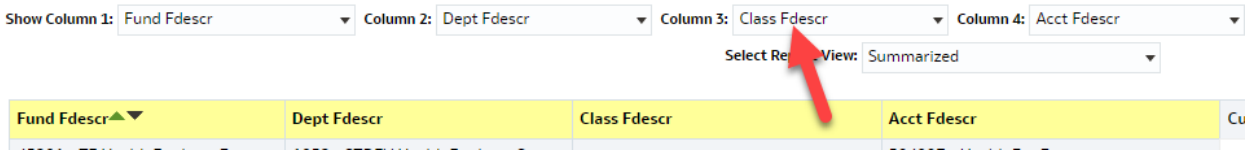
Projections for each class code will need to be entered on the relevant class code page.

Note which class code you're working in, Axiom will not display this info.



Data Warehouse Note:

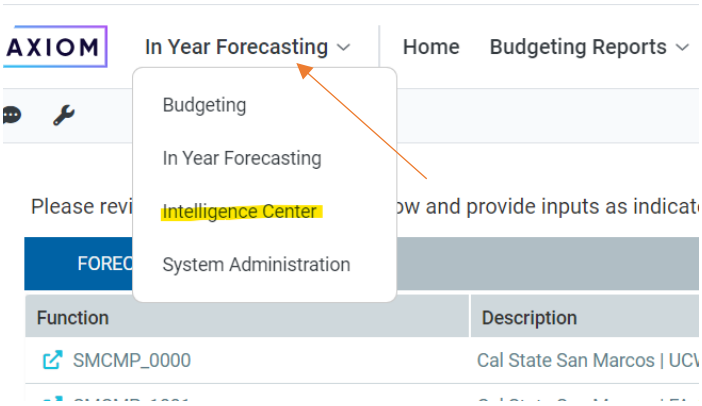
When pulling data for your department be sure to display class codes as well so you can see budget and actuals for "no class assigned" as well as any active class codes. If class codes are used, Axiom will separate actuals in the forecasting screens, and **you won't see the same totals as in Data Warehouse**. You will be able to run a report in Axiom that combines the totals.

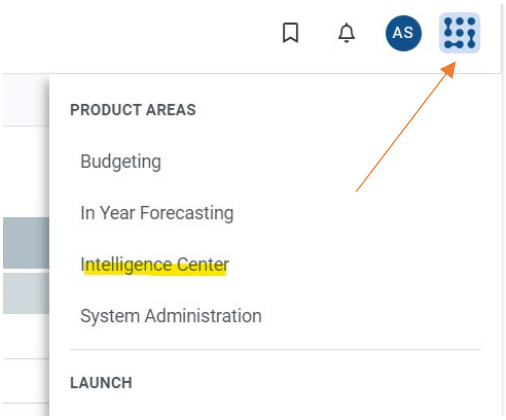


Axiom Reports

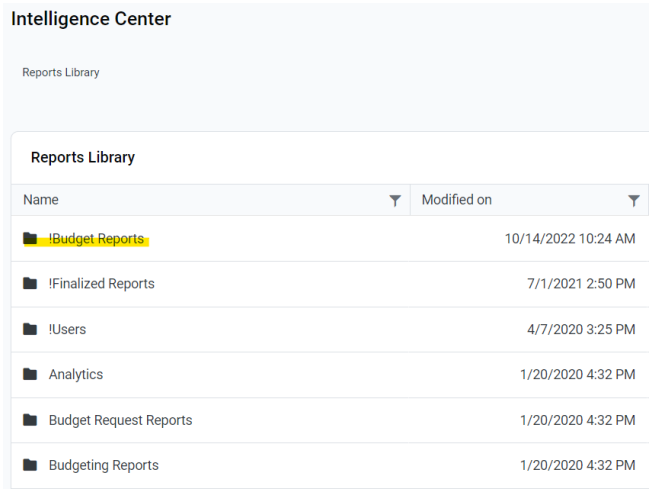
Running an Axiom report will allow you to view total expenditures for a department, combining class codes with “no class code assigned.”

To find the Axiom reports, select Intelligence Center under the dropdown menu in the upper left corner or from the navigation matrix in the upper right corner.





Reports that may be useful for mid-year can be found in the Budget Reports folder.





Double click on the report that you would like to use. The report will open in Excel. The default Axiom spreadsheet will also open. Please note that the report may open up behind the default spreadsheet.

Select the department criteria you wish to view and Click <F9> to refresh the data in the report.

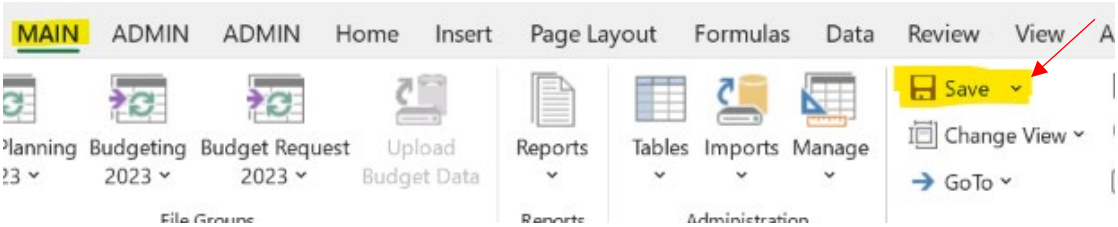
Example (from "BBA by Department – no Forecast" report):

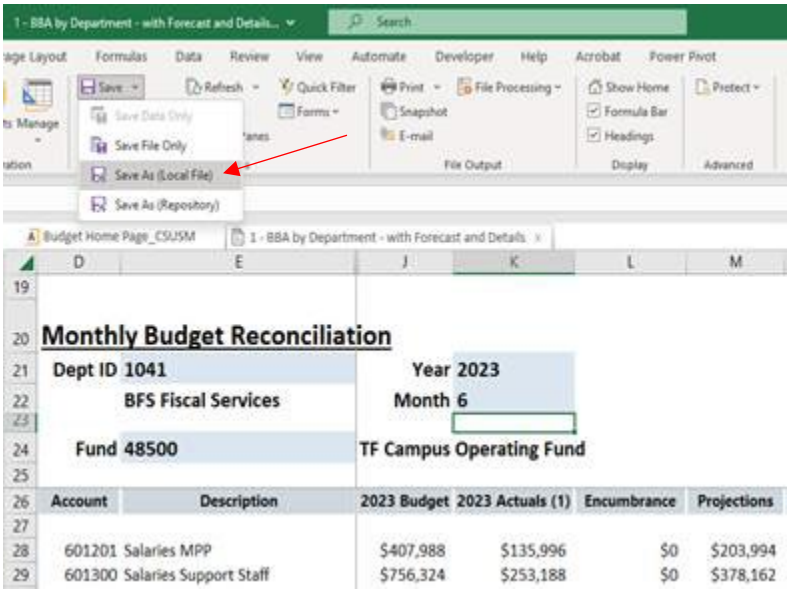


Axiom reports are intended to provide reporting data to you and your division/department as needed. You do not need to export these reports and submit them to the Budget Office as a part of your mid-year package – we can run the reports through Axiom once your projections are completed.

Save report in Excel

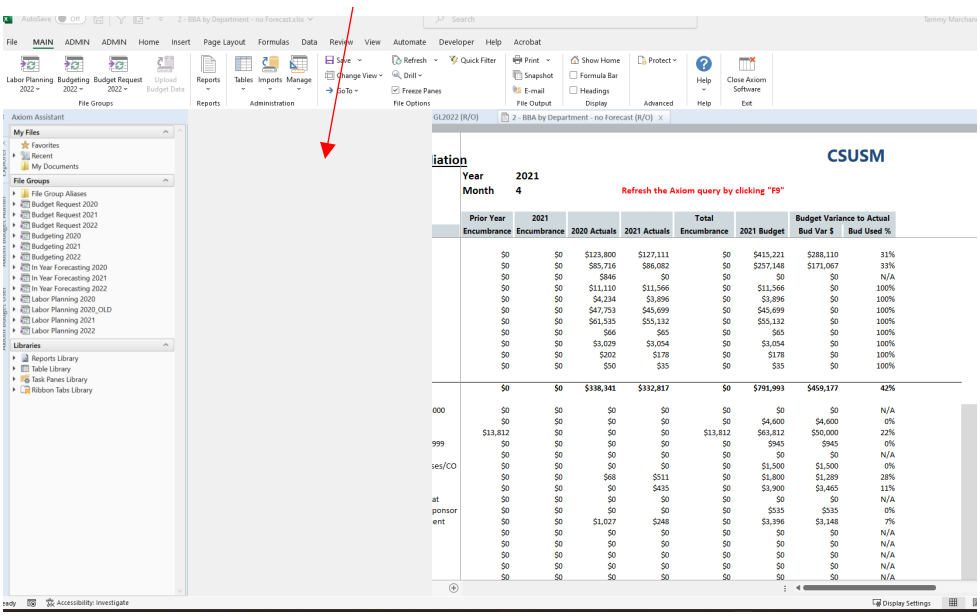
To save a populated report in Excel, from the Main menu, Click the down arrow next to <save> and select "Save As (Local File)" as shown below:


MAIN
ADMIN
ADMIN
Home
Insert
Page Layout
Formulas
Data
Review
View
Planning
Budgeting 2023
Budget Request 2023
Upload Budget Data
Reports
Tables
Imports
Manage
Save
Change View
GoTo
File Groups
Reports
Administration


Save
Save Data Only
Save File Only
Save As (Local File)
Save As (Repository)
Refresh
Quick Filter
Forms
Print
File Processing
Snapshot
E-mail
File Output
Show Home
Formula Bar
Headings
Display
Protect
Advanced
Budget Home Page_CSUSM
1 - BBA by Department - with Forecast and Details
Monthly Budget Reconciliation
Dept ID 1041
Year 2023
BFS Fiscal Services
Month 6
Fund 48500
TF Campus Operating Fund
Account
Description
2023 Budget
2023 Actuals (1)
Encumbrance
Projections
601201 Salaries MPP
$407,988
$135,996
$0
$203,994
601300 Salaries Support Staff
$756,324
$253,188
$0
$378,162

Troubleshooting

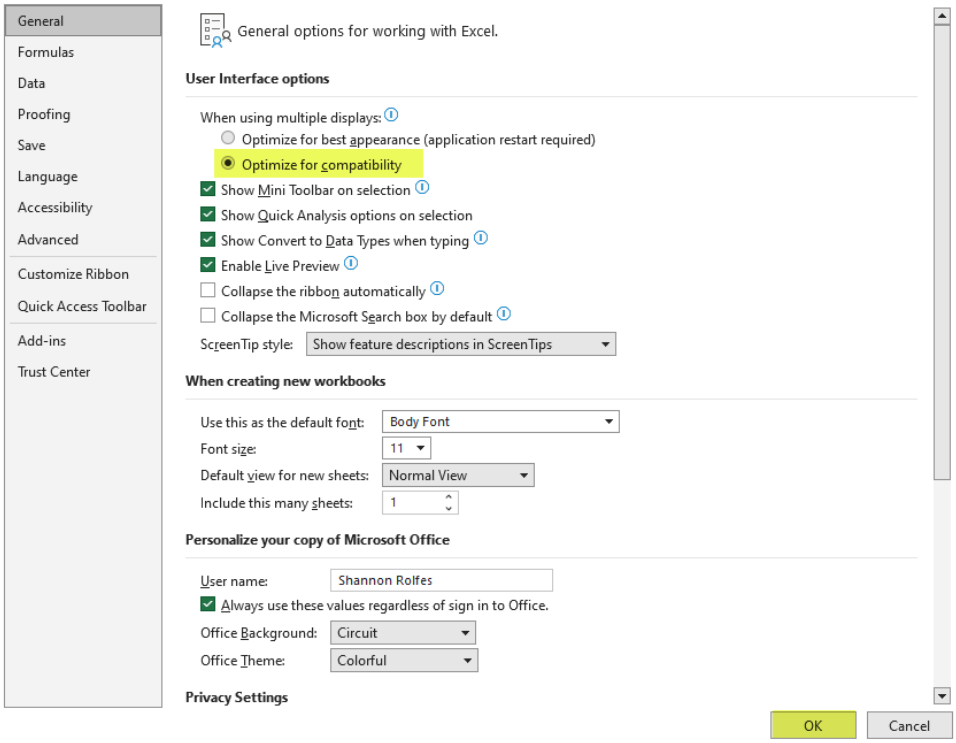
Gray box appears and blocks content on screen:



Solution:

Open Excel. Navigate to File > Options > General

Check the option under "When using multiple displays", select Optimize for compatibility > OK



Installing Chrome Browser Extension for Axiom Excel Client *(optional)*

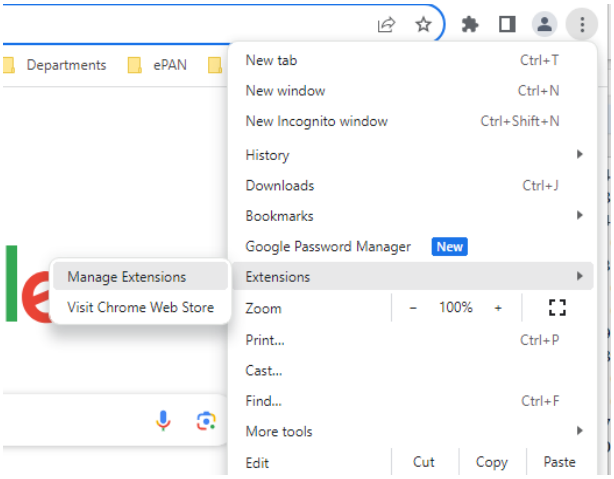
Please note: Microsoft Edge is the recommended browser for Axiom.

Some features used in Chrome may not work as well.

You can launch Axiom Excel Client using the browser Google Chrome, it requires an add-in. Follow the four steps below to install the add-in extension.

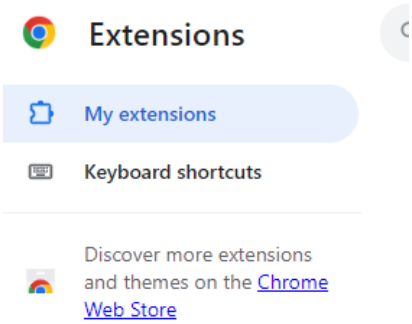
Step 1.

Click the 3-dot ellipsis button in the upper right corner of Chrome browser toolbar and select Extensions > Manage Extensions



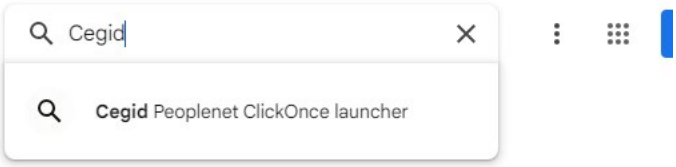
Step 2.

Click the link for the Chrome Web Store

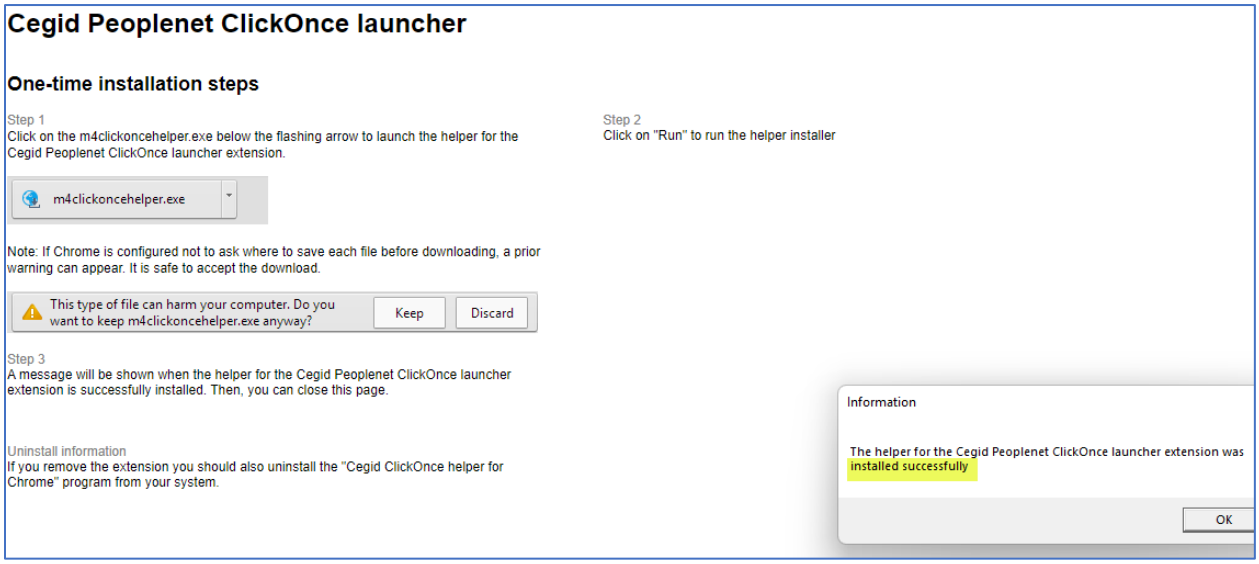


Step 3.

Type **Cegid** in the Search field > Click Enter > Click on Cegid Peoplenet ClickOnce launcher and follow the instructions to install the extension (Add to Chrome)

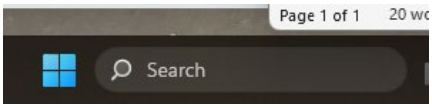


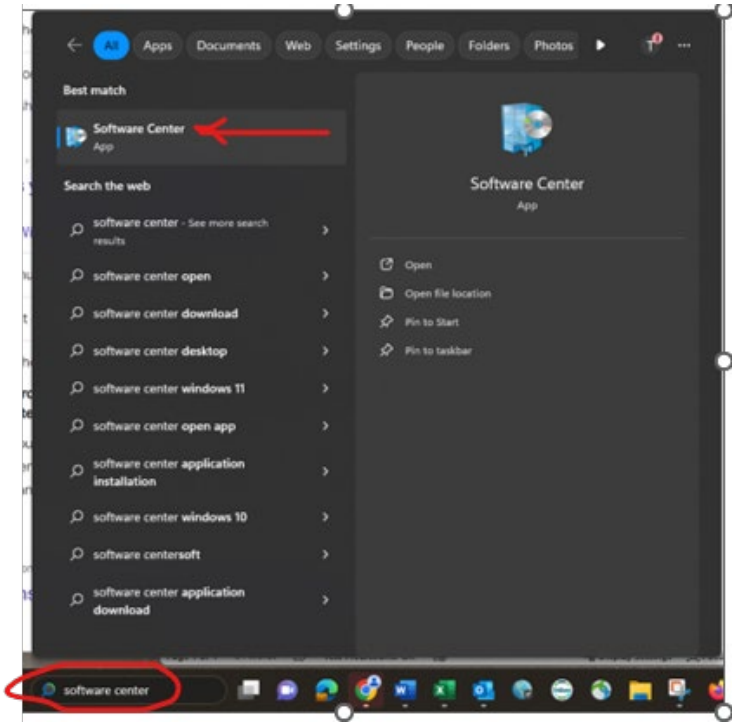
Successful installation looks like this:



VSTO Installer

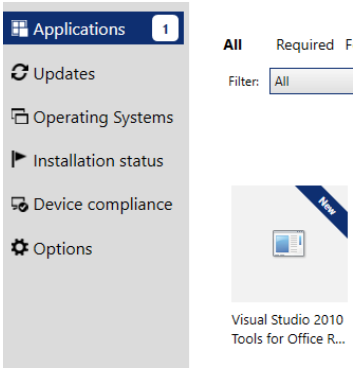
1. Search for Software Center in the Windows search bar and select the Software Center app:





You can also get to Software Center by going to the folder on your desktop labeled “IITS Self Help”. Folder contains a shortcut to Software Center.

2. Select "Visual Studio 2010 tools for office runtime" in the software center (this won’t show up if it’s already installed on your computer):



3. Run Installer following prompts, then resume Axiom install instructions.

Help Resources

Budget Office – Assistance with Axiom use, permissions, and access
budget@csusm.edu

FSO – Assistance with Axiom permissions and access
fso@csusm.edu

IITS – Assistance with system downloads for initial access
helpdesk@csusm.edu (760) 750-4790