Axiom User Guide

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Axiom Reports

Index of Available Reports

Available reports in the "!Budget Reports" folder

1 – BBA by Department – Benefits and Details

- Specific to an individual department
- Budget/Actuals/Encumbrances/Projections/BBA
- Individual transactions listed for reconciliation purposes

1 – BBA by Department – Benefits and Details – Bud Journals

- Same as above with added budget Journal lines

1 – BBA by Department – No Benefits

- Specific to an individual department
- Selected year budget with Actuals for that year and prior year
- Includes Encumbrance/Projections with Budget Variance to Actuals

1 – BBA by Department – No Benefits – with class codes

- Same as above, with class codes added

1 – Division Summary Report – Subdivision by Dept & Acct Cat

- Division totals with Colleges/Subdivisions/Departments broken out
- Can display individual department totals by Account Category
- Budget/Actuals/Encumbrances/Projections/BBA
- Includes Graphs

1 – Division Summary Report – with Forecast Account Category

- Division totals with Colleges/Subdivisions broken out
- Can display College/Subdivision totals by Account Category
- Budget/Actuals/Encumbrances/Projections/BBA
- Includes Graphs

1 – Division Summary Report – with Forecast Department

- Division totals with Colleges/Subdivisions/Departments broken out
- Can display individual department totals by Account Category if dept. selected
- Budget/Actuals/Encumbrances/Projections/BBA
- Includes Graphs
- Displays total forecasts by each department

2 – BBA by Department – no Forecast

- For Monthly Budget Reconciliation
- Specific to an individual department for a specific month

- Individual transactions listed for reconciliation purposes

2 – Division Summary Report – no Forecast

- Monthly Budget Summary
- Displays College/Subdivision/Department totals for a specific month
- Budget/Actuals/Encumbrances/BBA
- Can display individual department totals by Account Description if dept. selected

1 – Fund Report – Fund Balance with Forecast

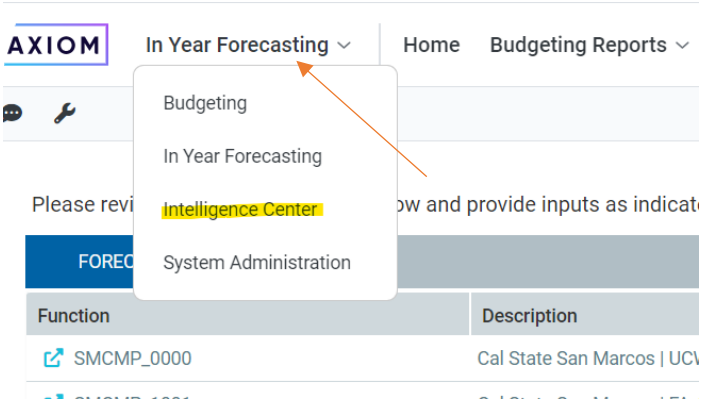
- Displays Depts within a specific Fund as of period
- Includes beg and end Fund Balance detail
- Budget/Actuals/Encumbrances/Projections (when available)/BBA
- Useful for Trust Fund reporting

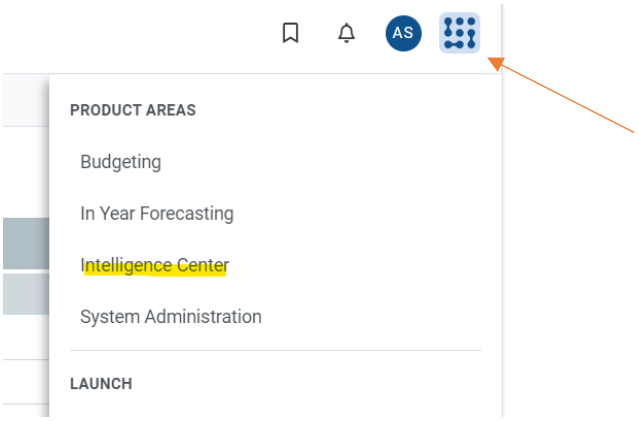
Additional folders labeled by Division contain custom area-specific reports for use by the specified Divisions.

View Axiom Reports

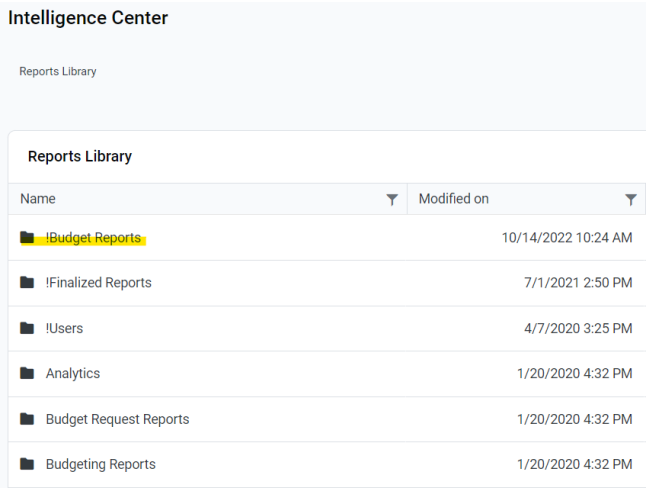
Running an Axiom report will allow you to view total expenditures for a department, combining class codes with "no class code assigned."

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

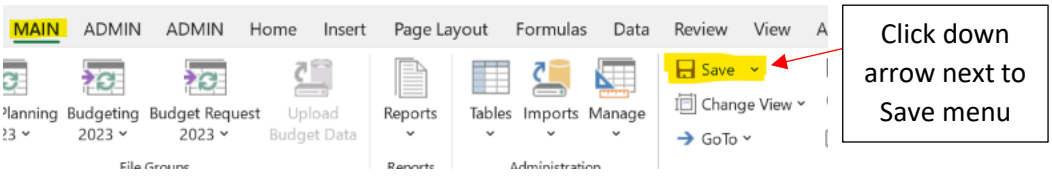
Example (from "BBA by Department – no Forecast" report):

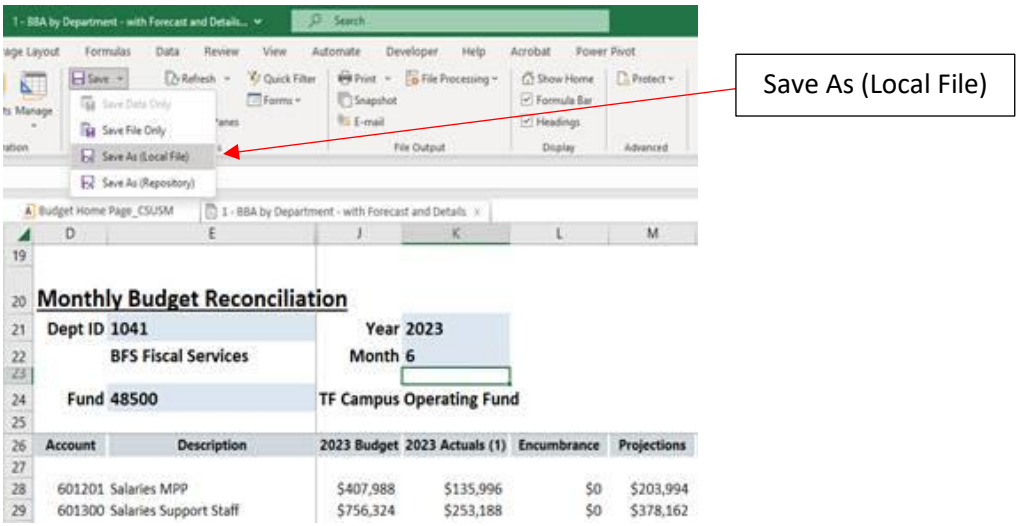


Axiom reports are intended to provide reporting data to you and your division/department as needed. You do not need to export these reports and submit them to the Budget Office as a part of your mid-year package – we will run the reports through Axiom once your projections are completed.

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:





Axiom In Year Forecasting

Quick Log-In Link

Use this link in Microsoft Edge to access in-year forecasting quickly: [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)

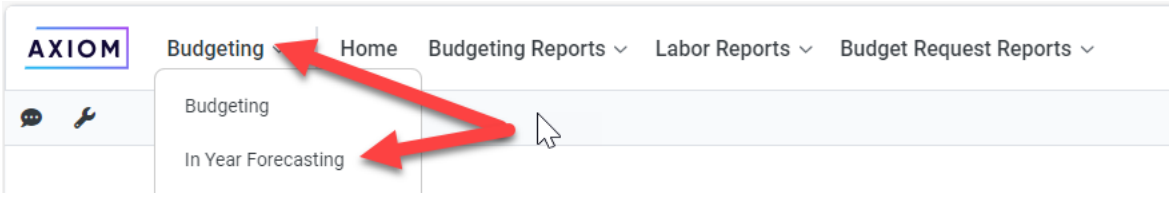
-or-

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.



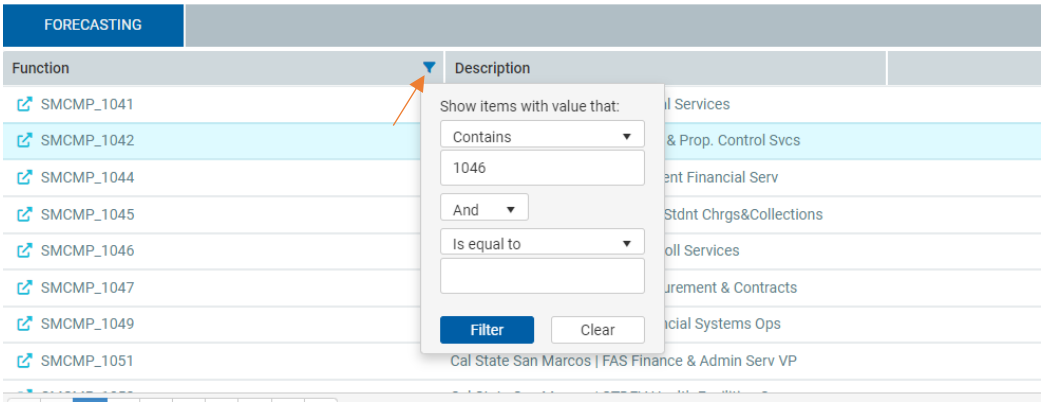
You should see all the departments that you manage, but not others (please let Budget or FSO know if this is not the case). Select a department by clicking on the arrow in front of the department number.

Please review your in year forecast below and provide inputs as indicated in the plan files.

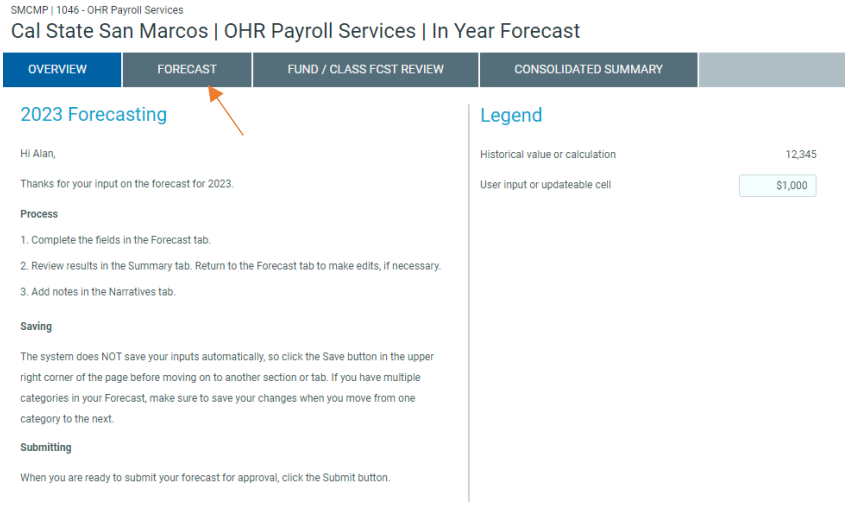
FORECASTING

Function	Description	2023 Q1 FCST
SMCMP_1041	Cal State San Marcos | BFS Fiscal Services	$148,481
SMCMP_1042	Cal State San Marcos | BFS Distr & Prop. Control Svcs	$0
SMCMP_1044	Cal State San Marcos | BFS Student Financial Serv	$0
SMCMP_1045	Cal State San Marcos | FASCWA Stdnt Chrgs&Collections	$0
SMCMP_1046	Cal State San Marcos | OHR Payroll Services	$0
SMCMP_1047	Cal State San Marcos | BFS Procurement & Contracts	$0
SMCMP_1049	Cal State San Marcos | BFS Financial Systems Ops	$0
SMCMP_1051	Cal State San Marcos | FAS Finance & Admin Serv VP	$0

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.

> *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.*

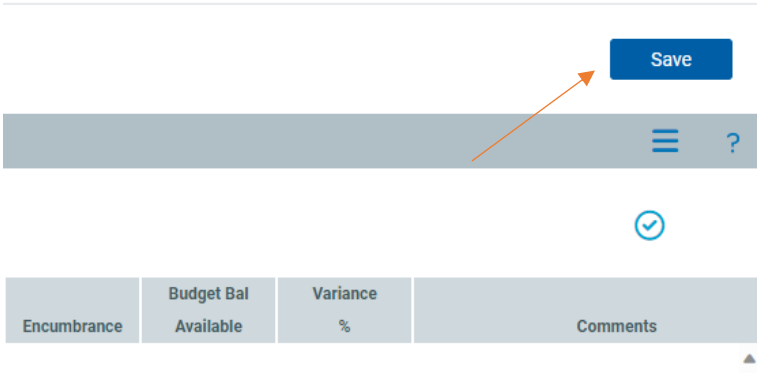
Accounts such as "601201 – Salaries MPP" use a Forecast Method called "Fcst Detail" and can have additional detail lines entered as shown in the example above. For accounts such as "601301 – Overtime," only a total monthly amount can be entered.

> *Note: If you would like the "Fcst Detail" added for an account code that does not currently have that option, please notify the Budget Office. We can make these updates for you prior to the start of the next fiscal year. Unfortunately, these updates cannot be made mid-year. Accounts can only be switched between Fcst Detail and Fcst Monthly when setting up the accounts at the start of the fiscal year. Please send requests to change an account to the Budget Office.*

Self-support departments with benefit expenditure line items that appear in Axiom will need to project expenses for these benefit accounts. Departments that are not considered self-support DO NOT need to project expenses for benefits but can submit $0 benefit projections as a placeholder.

After completing the department's expenditure projections, click <Save> in the upper right corner. The user can always return to this page and make additional changes as needed.

> **Tip:** We recommend saving your work periodically while inputting data in Axiom. The system may time-out; saving frequently will ensure you don't lose your work.



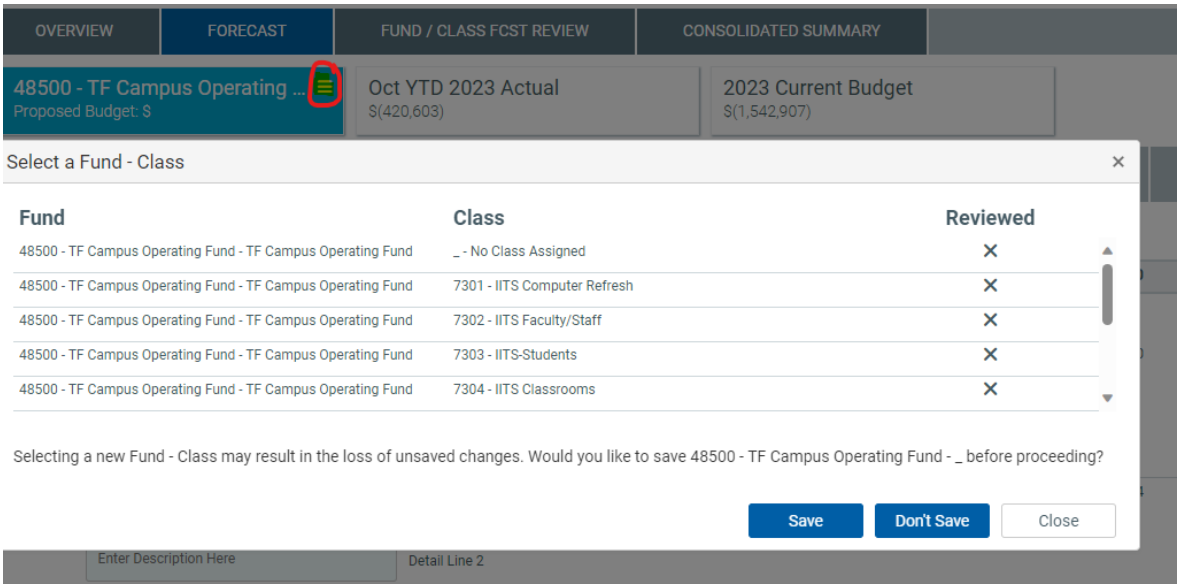
Additional Steps for Departments with Class Codes

Projections for each class code can be entered on the relevant class code page, however this is **optional**. **If you prefer, you can project all expenses in aggregate on the "No Class Assigned" page.**

If the department chooses to project expenses using class codes, data for 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 the 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."

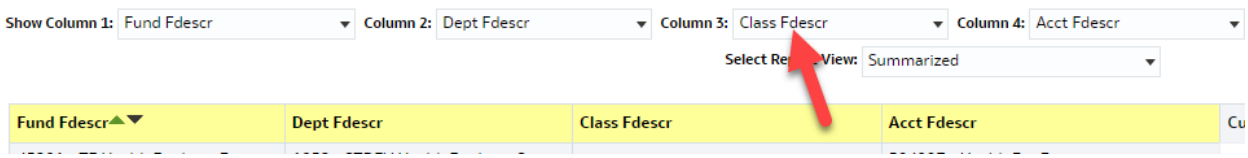
If you choose to use class codes in the In Year Forecasting module, you will need to run an Axiom report to see your projected BBA.

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



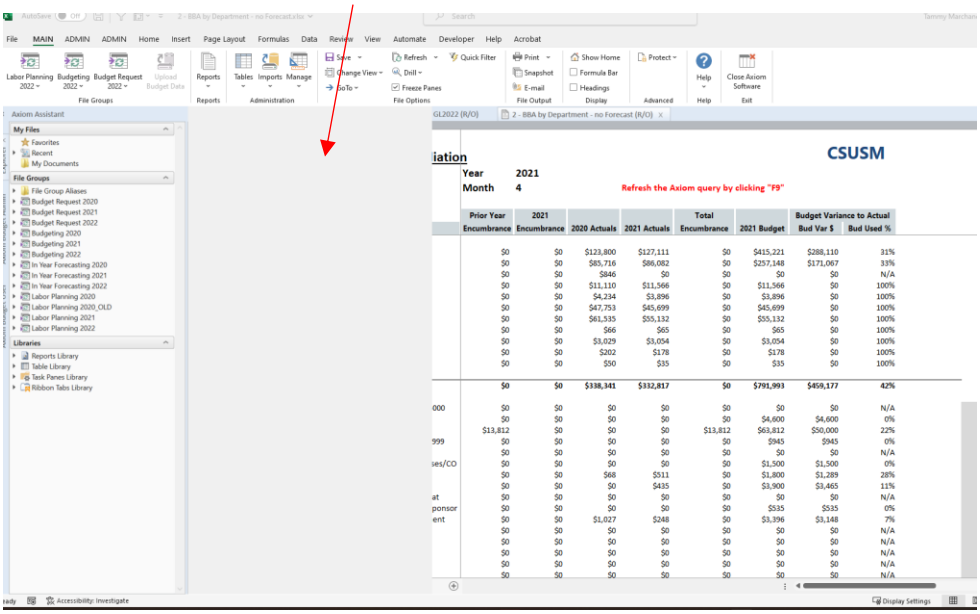
Data Warehouse Note if class codes are used:

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 will not see the same totals as in Data Warehouse unless you break them out**. You will be able to run a report in Axiom that combines the class code totals.



Troubleshooting

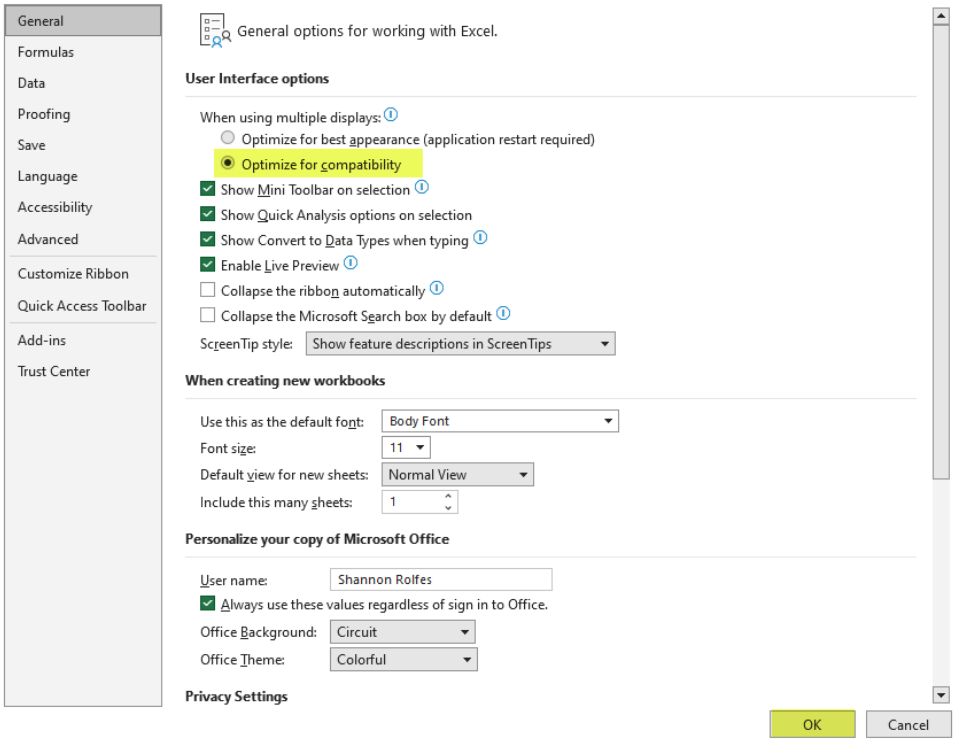
Gray box appears and blocks content on screen:



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 – not recommended)*

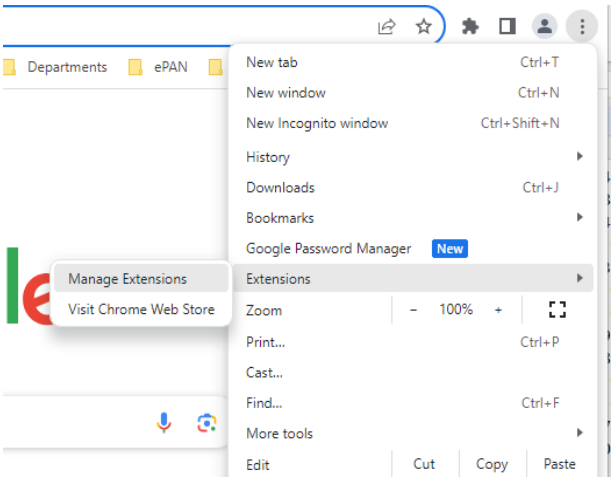
Please note: Microsoft Edge is the recommended browser for Axiom.

Some Axiom 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.

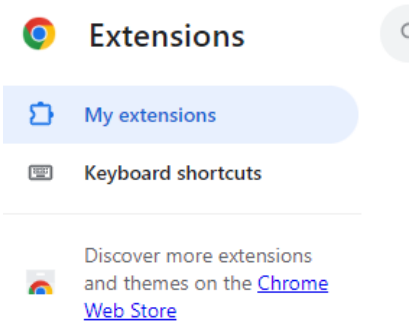
Step 1.

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



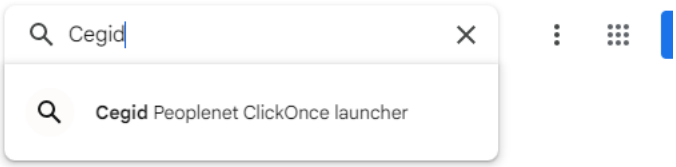
Step 2.

Click the link for the Chrome Web Store

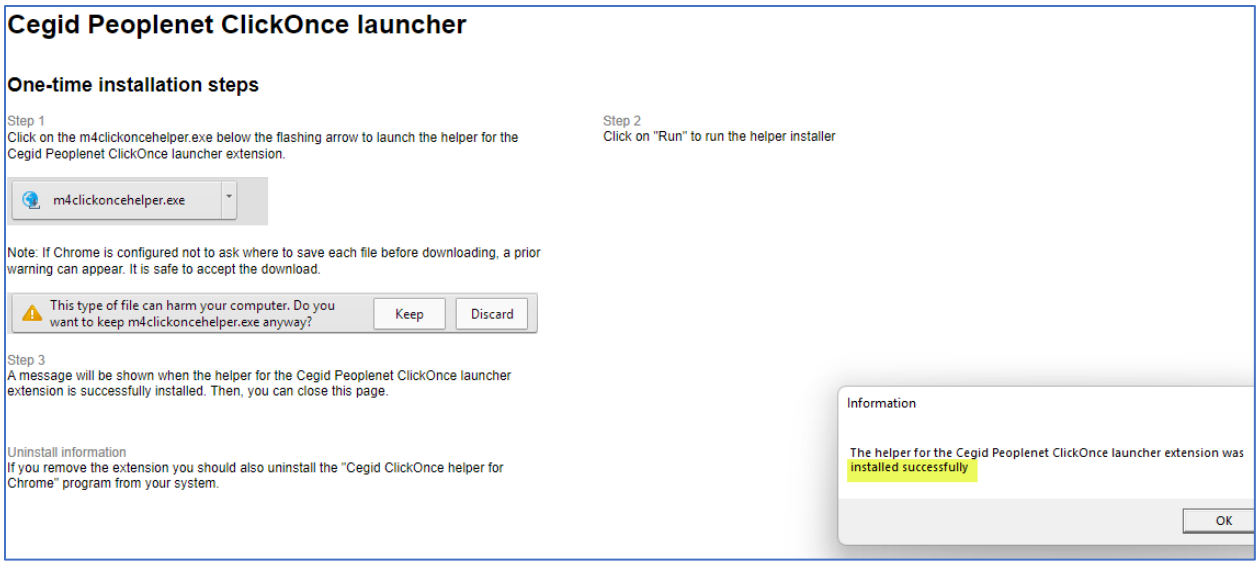


Step 3.

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)

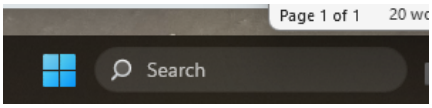


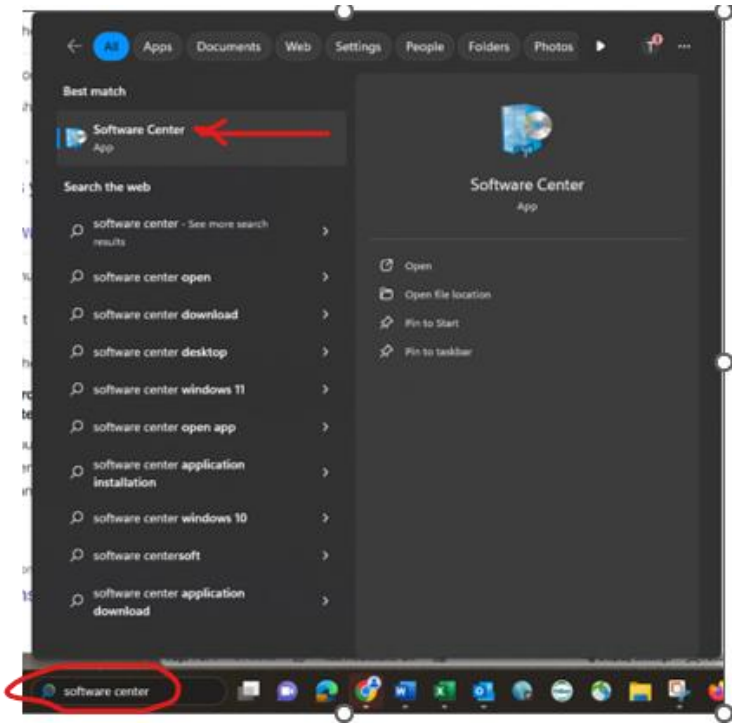
Successful installation looks like this:



VSTO Installer

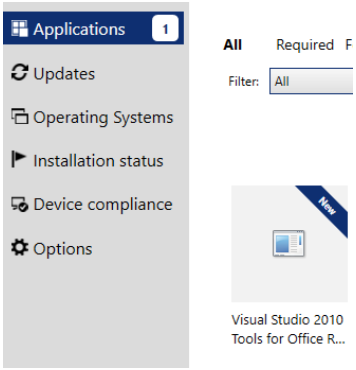
1. Search for Software Center in the Windows search bar and select the Software Center app:





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