
<h1>Axiom Budget System 25</h1> <p>UK UNIVERSITY OF KENTUCKY</p> <p>Presented by SAP Training Manager, Instructor</p>		

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Course Content

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Unit 1

The word "AXIOM" is written in a bold, dark blue, sans-serif font. It is centered within a rectangular frame. The top and bottom horizontal bars of the frame are blue, while the left and right vertical bars are purple. The frame is slightly offset from the center of the slide.


AXIOM

Axiom Budget System (ABS) Overview

Axiom Budget System (ABS)

- A financial planning software solution system, separate from SAP, designed for budget planning and salary proposals for the University of Kentucky budget development process
- Web-based application that has an underlying Excel base



-  during the budget development process

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Axiom Budget System (ABS) (Continued)

- Capabilities:
 - Enable budgeting for FM, HR and GM (Land Grants only) data
 - Allow for extracting and reinserting data from and to SAP
 - Provide ability for reporting using UK-developed reports in the system
 - These reports are only available during the budget development process.
 - Allow reports to be downloaded to Excel as needed



Security

- Based on department(s)
- Area Fiscal Officers (AFOs) determine departmental assignments for budget users for security set-up
- Department assignments control data access in Axiom



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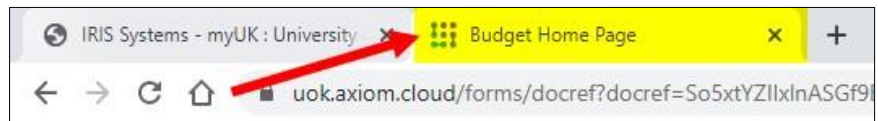
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Access

- Access to Axiom is obtained by clicking on the Axiom Budget System beach ball icon on the myUK Launch Pad screen.



- Axiom's Budget Home Page will open in a separate browser window.



Test System Access

- Access to the Axiom Test System for practicing after training is obtained by:
 - ♦ going to the following URL: <https://myukqas.uky.edu/irj/portal>;
 - ♦ signing in with your regular linkblue credentials; and then
 - ♦ clicking on the Axiom Budget System beach ball.
- The Axiom Test System will open in a separate browser window.



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Tips



Tips (Continued)



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Tips (Continued)

- Run Axiom reports to check your data entries.

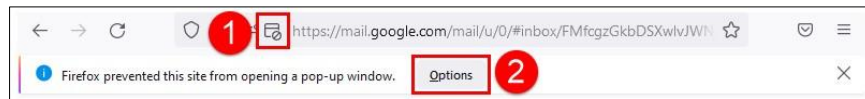


- Use “Ctrl +” keys to increase the font size of the system.
- Use “Ctrl -” keys to decrease the font size of the system.

11Tips (Continued)

- When opening a plan file, if you receive a message from your browser regarding a pop-up window, you may first need to “allow” pop-up windows in your browser’s settings.

- ♦ An example from Firefox:



- Click on either the icon in the address bar (1) or the Options button (2) to select the option that allows pop-up windows.

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Tips (Continued)

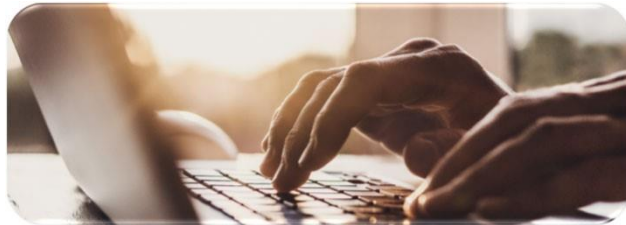
- Any salary adjustments to be made for an employee (for the current year) during the budget development process (January thru June) will be made by submitting an online ZPAR to Compensation.



- Any salary changes to be made for an employee (for the future year) after the budget/salary process is completed will be made by submitting an online ZPAR to Compensation on July 1.

Keying Budget Data Tips

- Non-position budgeting, referred to as Campus Budgeting and Land Grant Budgeting in Axiom, will be keyed by:
 - ♦ Funds Center/Commitment Item combinations for Campus Budgeting; and
 - ♦ Grant/Commitment Item combinations for Land Grant Budgeting.
- Position and salary proposals, referred to as Labor Planning in Axiom, are keyed by the 5-digit UK department number.



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Keying Budget Data Tips (Continued) • Budget data is

keyed by Commitment Item (CI) as follows: ♦ Revenue

Budgets:

- CIs beginning with 4*
- Enter as positive values in Axiom to increase the revenue budget



♦ Expense Budgets:

- CIs beginning with 5* (excluding CIs = 519000; 529000; 539000)
- CIs beginning with 6* (excluding CIs = 610000; 620000; 630000)
- CIs beginning with 755*
- Enter as positive values in Axiom to increase the expense budget

Keying Budget Data Tips (Continued)

- Budget data is keyed by CI as follows (Continued): ♦ Transfer

Budgets (Funds budgeted in transfer codes to move funding from one unit to another) – two types:

- Revenue Transfers:
 - CIs beginning with 74*
 - Used only for receiving funds
 - Enter as positive values
- Expense Transfers:
 - CIs beginning with 75* (excluding CIs = 750401; 750402; 750403, 755xxx)
 - Enter as positive values



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Keying Budget Data Tips (Continued)

- Budget data is keyed by CI as follows (Continued):
 - ♦ Recharge/Pass-thru Budgets (negative expense budgets):
 - Enter as negative values
 - CI = 519000
 - CI = 529000
 - CI = 539000
 - CI = 610000
 - CI = 620000
 - CI = 630000
 - CI = 750401
 - CI = 750402
 - CI = 750403



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System Structure

- Budgeting in Axiom is organized by plan files (how the data is retrieved).
 - ♦ Combination of the 5-digit UK department number and business area for Non-Position Campus Budgets only
 - ♦ The 5-digit UK Department number for Land Grant budgets and Labor Planning
- The 5-digit UK department numbers will be displayed with an underscore UK at the end (_UK), which eliminates those department numbers that can convert to scientific notations.



Budget ↑	
10000_UK - 0101	OFFICE OF THE PRESIDENT
10200_UK - 0101	UNIVERSITY SENATE COUNCIL
10700_UK - 0201	DONOVAN ACCOUNTS

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System Structure (Continued)

- The data is arranged in three tabs to accommodate the University's budgeting and salary proposal processes:



- Campus Budgeting and Land Grant Budgeting tabs:
 - Used for non-position budgeting
 - Only the College of Agriculture, the University Budget Office and representatives in the Provost Budget Office will have access to the data under the Land Grant Budgeting tab.
- Labor Planning tab:
 - Used for both regular and non-regular position budgeting and salary proposals for the upcoming budget year

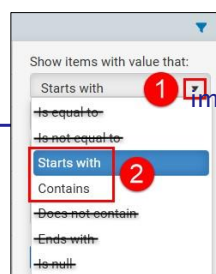
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Plan File Filtering

- If you see the desired plan file when the system is first accessed, you can just open the file immediately.
- If you do not see the desired plan file, the files can be easily filtered to quickly find the desired plan file.



- Click on the down arrow in the field immediately
- under Show items with



value that: (1) and select either Starts with or Contains (2) ONLY

- The other operands are very specific, if the exact string is not entered and correctly, the desired results may not appear.

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Plan File Filtering (Continued)

3. Enter the desired characters of the 5-digit UK department number
 - This can be first character only, the first two characters only, etc. - all the way up to five characters.
4. Click on the Filter button (or press Enter key)
 - All plan files related to the filter variables will be displayed.

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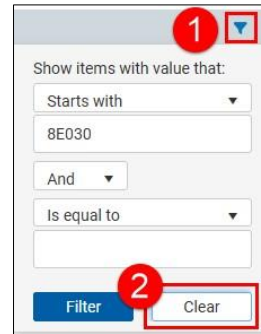
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Plan File Filtering (Continued)

5. Select the desired plan file by clicking on the Open plan file icon located to the left of the 5-digit UK department number
 - Make sure to select the correct 5-digit UK department number and business area combination!



- Click again on the Filter icon (1) and then the Clear button (2) to clear the filter.



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Plan File Access

- Only one user can enter/save data in a plan file at a time.
- If only you have a plan file open, a pencil will be seen in the first icon above the Save button, and you can enter/save data.



- If another user opens the same plan file first, a padlock will be seen in this icon, and the Save button will be greyed out. You will not be able to enter/save data at this time.



Any Questions?

- Axiom Budget System (ABS)
- Security
- Access
- Tips
- Keying Budget Data Tips
- System Structure
- Plan File Filtering



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Unit 2



Non-Position Budgeting

Non-Position Budgeting Overview

- This is the first phase of the University of Kentucky's budgeting process that generally lasts four weeks.
- It refers to anticipated future fiscal year revenue and expense budget entries that are not associated with position data.



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Non-Position Budgeting Overview (Continued)

- The initial focus of this phase is to estimate the general fund revenues.
 - ♦ This data is used in determining a part of the general fund expenditure base for an Area.
 - ♦ The estimates should be based on anticipated receipts of funds expected to be spent during the fiscal year. These funds can be self-generated from an external source or transferred into the unit from another unit/entity.



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Non-Position Budgeting Overview (Continued)

- Income estimates for the auxiliary fund and the restricted fund groups can be initiated at the same time as the general fund, but they can continue until the budgets are finalized.

Accessibility to the plan files associated with non-position budgeting will be available on two separate occasions during the budget development process:

- ♦ 1st – Early March to focus on the entry of general fund budgets by Funds Center/Commitment Item or Grant/Commitment Item combinations



- ♦ 2nd – April/May to complete the budgets

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Accessing Non-Position Budgeting

1. After accessing the Axiom system, select the Campus Budgeting tab (or the Land Grant Budgeting tab) as needed.

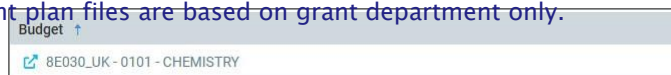


2. Find the desired plan file by either scrolling through your list of authorized plan files (based on your security access) or use the filter mechanism described in the ABS Overview unit.

- ♦ Ensure you are selecting the appropriate 5-digit UK department number/business area combination for Campus Budgeting. All Land

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Grant plan files are based on grant department only.



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Accessing Non-Position Budgeting (Continued)

3. Click the Open plan file icon located to the left of the plan file



- ♦ A separate browser window will open with three tabs displayed:
 - Budget
 - Transfers
 - Funds Center Review (or Grant Review, if the Land Grant Budgeting tab is used)



Funds Center/Land Grant Selection

- Under the Budget tab, the first Funds Center (or Land Grant) fitting the plan file criteria will be displayed in a blue box.



1. Individual Funds Centers can be selected within the plan file by clicking on the Select a Fundctr (or Select a grant) icon located to the right of the Funds Center name.



Funds Center/Land Grant Selection (Continued)

- The Funds Centers (or Grants) plan files are arranged by funding source (General, Auxiliary and Restricted) (1).
 - ♦ These can be seen by scrolling through the list (2).

Select a Fundctr

Fundctr	Reviewed
General	
1012075920 - RCTF-STUDENT SUPPORT-INTERDISCIPLINARY	X
1012086040 - THE EXCEL PROGRAM IN GENERAL AND ORGANIC	X
1012096560 - SUMMER SCHOOL- CHEMISTRY	X
1012141000 - CHEMISTRY RECRUITMENT	X
1012143610 - CHEMISTRY BASE PERSONNEL	X
1012143620 - CHEMISTRY OPERATING	X
1012143630 - CHEMISTRY DEAN'S COMMITMENT	X
1012143640 - CHEMISTRY INSTRUCTIONAL	X
1012146270 - CHE SPACE & FACILITIES	X
1012149660 - PHOEBE GLAZER RESEARCH SUPP	X
1012149670 - DAVID HEIDARY A&S STARTUP	X

Selecting a new Fundctr may result in the loss of unsaved changes. Would you like to save 1012075920 - RCTF-STUDENT SUPPORT-INTERDISCIPLINARY before proceeding?

Save Don't Save Close

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Funds Center/Land Grant Selection (Continued)

- Click on the specific Funds Center (or Grant) to be budgeted from the selection (the row will be shaded gray).

Fundctr	Reviewed
1012157510 - CHE FACULTY RESEARCH	X
1012815300 - CHE HR BUDGET CLEARING	X
1013160280 - CHEMISTRY LABORATORY-A&S	X
1013201560 - FOR SUPPORT OF CRYSTALLOGRAPHY RESEARCH	X
1013201570 - FOR SUPPORT OF NMR RESEARCH LAB IN DEPAR	X

- Click on either the Save or Don't Save button to proceed to the selected Funds Center (or Grant).
 - NOTE: If you select the Don't Save button, the current plan file will not be saved as you proceed to the selected Funds Center.

Budget Tab

- On the Budget screen, budgets are displayed under three budget categories:

- Revenues
- Personnel Expenses
- Other Expenses

BUDGET		TRANSFERS	FUNDS CENTER REVIEW
1013160280 - CHEMISTRY LABORATORY-A&S			
Commitment Items	Current FY Recurring Budget	New FY Proposed Future Budget	
▶ Revenues			
▶ All Revenues	491,700.00		0.00
+ Insert Budget Group			
Total Revenues	491,700.00		0.00
▶ Personnel Expenses			
▶ All Personnel Expense	56,193.12		119,052.34
+ Insert Budget Group			
Total Personnel Expenses	56,193.12		119,052.34
▶ Other Expenses			
▶ All Other Expenses	435,506.88		0.00
+ Insert Budget Group			
Total Other Expenses	435,506.88		0.00
Total Expenses	491,700.00		119,052.34
Net Operating Result	0.00		(119,052.34)

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Budget Tab – Revenues Category

- The Revenues category contains CIs beginning with 4* and 74*.
 - ♦ Budgets in 74* CIs are revenue transfer budgets. Although they are entered on the Transfers screen, those budgets will be reflected in the Revenues category.

▶ Revenues		
▼ All Revenues	491,200.00	0.00
402990 - Fees - Bad Debt Reserve	0.00	0.00
404620 - Fees - Chemistry	1,200.00	0.00
406660 - Fees - Student Miscellaneous	490,000.00	0.00
+ Add All Revenues		

Budget Tab – Personnel Expenses Category

- The Personnel Expenses category contains CIs beginning with 51* and 52* that are position related.
 - ♦ Because these are personnel or labor specific and they are associated with positions, a user cannot directly enter these budgets in the Budget screen. The system will pull in these budgets from the Labor Planning screen (discussed later in this course).

Personnel Expenses		
▼ All Personnel Expense	65,698.92	60,748.39
512021 - Professional Administrative Full-Time Reg.	0	46134.40
512022 - Professional Administrative FT Non-Produ	0	0.00
512031 - Secretarial/Clerical Full-Time Regular Pay	47,136	0.00
512032 - Secretarial/Clerical Full-Time Non-Product	0	0.00
512033 - Secretarial/Clerical Full-Time Premium anc	0	0.00
512121 - Professional Administrative Part-Time Reg	0	0.00
512122 - Professional Administrative PT Non-Produ	0	0.00
513010 - Teaching Assistants	0	0.00
513110 - Student - Non-Work Study	0	0.00
520002 - Employer Health Contribution-Benefit Budg	9,288	5536.13
520003 - Basic Life-Benefit Budget	17	16.61
520004 - Employer MBR Contribution-Benefit Budg	933	913.66

Budget Tab – Other Expenses Category

- The Other Expenses category contains CIs beginning with 5* (excluding those associated with positions), 6*, 750401, 750402, 750403 and 755* only.

Other Expenses		
▼ All Other Expenses	425,501.08	0.00
530000 - Budget Pool - Current Expenses	424,756.17	0.00
530110 - Analysis and Laboratory Services	0.00	0.00
530401 - Freight and Other Transportation	0.00	0.00
531000 - Communications Budget Pool & Basic Cha	744.91	0.00
531205 - Printing: Managed Print Services	0.00	0.00
533030 - Maintenance and Repair of Equipment	0.00	0.00
533044 - Maintenance and Repair of Scientific Equip	0.00	0.00
534040 - Rental of Gas Cylinders	0.00	0.00
534042 - Rental and Leases - Equipment	0.00	0.00
535201 - Computer - License Fee for Software	0.00	0.00
535205 - Technical Software/Licenses and Supplies	0.00	0.00
535206 - Administrative Data Processing Supplies	0.00	0.00
540310 - Building Supplies	0.00	0.00
540311 - Chemicals and Laboratory Supplies	0.00	0.00

Budget Groups

- Commitment Items are listed under each budget category in the following budget groups:

- All Revenues

Revenues		
▼ All Revenues	491,200.00	0.00
402900 - Fees - Bad Debt Reserve	0.00	0.00

- All Personnel Expenses

Personnel Expenses		
▼ All Personnel Expense	65,698.92	60,748.39
512021 - Professional Administrative Full-Time Regu	0	46124.40

- All Other Expenses

Other Expenses		
▼ All Other Expenses	425,501.08	0.00
530000 - Budget Pool - Current Expenses	424,756.17	0.00

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Budget Group Commitment Items

- To display the Commitment Items under each budget group, click on the drop-down icon.



- Only CIs with either current year actual or current year recurring budgets will display.

Commitment Items	Current FY	New FY
	Recurring Budget	Proposed Future Budget
▶ Revenues		
▼ All Revenues	491,700.00	0.00
402990 - Fees - Bad Debt Reserve	0.00	0.00
404620 - Fees - Chemistry	1,700.00	0.00
406660 - Fees - Student Miscellaneous	490,000.00	0.00

Budget Group Commitment Items (Continued)

- The only time CIs will display is when there are current year actuals (this is hidden) or current year recurring budget.
- If a budget category does not show the budget group (those beginning with "All..."), it means the data had no current year actuals or recurring budget.

Commitment Items	
▶ Revenues	←
+ Insert Budget Group	
Total Revenues	

VS

Commitment Items	
▶ Revenues	
▶ All Revenues	←
+ Insert Budget Group	
Total Revenues	

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Add Budget Group Commitment Items

1. Additional CIs can be added by clicking on the Add All Revenues and/or Add All Other Expenses link seen after the last listed CI for these two budget groups.

The screenshot displays two panels of budget group commitment items. The left panel, titled 'All Revenues', lists three items: '402990 - Fees - Bad Debt Reserve', '404620 - Fees - Chemistry', and '406660 - Fees - Student Miscellaneous'. Below these items is a yellow button labeled '+ Add All Revenues' with a red arrow pointing to it from the right. The right panel lists three items: '639305 - Environmental Charges', '639328 - Job Order Charges', and '639449 - Wildcard ID Badges'. Below these items is a yellow button labeled '+ Add All Other Expenses' with a red arrow pointing to it from the left.

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Add Budget Group Commitment Items (Commitment)

2. In the pop-up window, start typing the desired CI
 - ♦ The system will begin searching as you type until the desired CI is found.
 - ♦ You cannot scroll through a complete list of CIs because only a limited number of CIs are displayed at a time.

Calc Method Variables

Select Commitment Item

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- 440001 - Professional Fees - Dental Services
- 440002 - Dental Services - Self Insurance Plan
- 440003 - UK Dental Care Plan Payments

3. Click on the desired CI once found

Select Commitment Item

440

- 440109 - Sponsorship - Corporate Taxable
- 440110 - Advertising
- 440111 - Alumni Dues - Membership
- 440112 - ID Card Service

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Add Budget Group Commitment Items (Commitment)

4. Click on the Apply button to insert into the plan file



Select Commitment Item

440110 - Advertising

Apply Cancel

5. Repeat steps 1 thru 4 to insert any additional CIs



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Keying Proposed Future Budget

1. After all appropriate CIs are listed in a budget group, key in the applicable Proposed Future Budget amounts for the new fiscal year (1), and then click on the Save button (2).

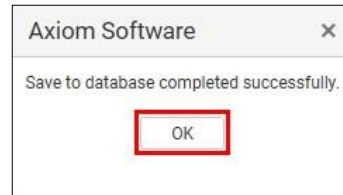
Commitment Items	Current FY	New FY
	Recurring Budget	Proposed Future Budget
Revenues		
▼ All Revenues	491,700.00	513,700.00
402990 - Fees - Bad Debt Reserve	0.00	0.00
404620 - Fees - Chemistry	1,700.00	1,950.00
406660 - Fees - Student Miscellaneous	490,000.00	511,250.00
440110 - Advertising	0.00	500.00
+ Add All Revenues		

- ♦ Leave 0.00 for any CIs that will not be budgeted next fiscal year!

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Keying Proposed Future Budget (Continued)

- After saving, the system will display a message indicating the data was saved successfully.



2. Click the OK button and move on to the next budget group, Funds Center/Grant or new plan file.



Commitment Item Tips

- To search for an existing CI in a plan file that is not readily spotted, press the Ctrl + F keys on your keyboard and type the CI in the search box located at the bottom of the screen (2).
 - ♦ If the CI is found, it will be highlighted green (3).

Commitment Items	Current FY	New FY
	Recurring Budget	Proposed Future Budget
Revenues		
▼ All Revenues	491,700.00	513,715.00
402999 - Fees - Bad Debt Reserve	0.00	0.00
404620 - Fees - Chemistry	1,700.00	1,925.00
406660 - Fees - Student Miscellaneous	490,000.00	511,290.00
440110 - Advertising	0.00	500.00
+ Add All Revenues		
+ Insert Budget Group		
Total Revenues	491,700.00	513,715.00
Personnel Expenses		
▶ All Personnel Expense	56,193.12	119,052.34
+ Insert Budget Group		
Total Personnel Expenses	56,193.12	119,052.34
Other Expenses		
402999		

402999 [^ v] Highlight All Match Case Match Diacritics Whole Words 1 of 1 match

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Commitment Item Tips (Continued)

- ♦ If the CI is not found, the search box will turn red (1) and you will see the wording Phrase not found to the far right of all the checkboxes (2).



- A CI cannot be inserted in a plan file if it already exists in the plan file.
 - ♦ The CI would not be available for selection from the drop-down list.



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Transfers

- A proposed budget should be established to cover every anticipated revenue and expense during the budget development process including anticipated transfers.
- Transfers are the movement of funds from one unit to be spent by another.
 - ♦ A unit can be a different department or different funds center.



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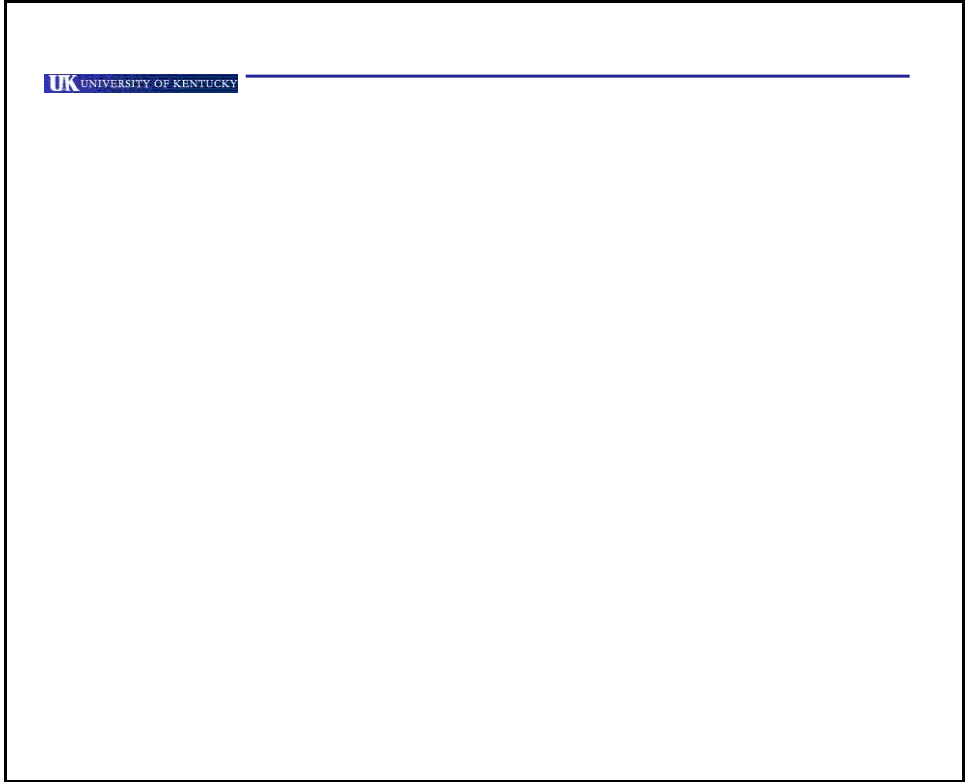
Transfers (Continued)

- Transfers are denoted by CIs beginning with 7*.
 - ♦ Transfers In are to be in a 74* CI
 - ♦ Transfers Out are to be in a 75* CI

- The Transfers In and Transfers Out sections work the same depending on whether the person keying in the data first is a recipient of the funds or the sender of the funds.
 - ♦ For example, if dept A is a recipient of funds and they are keying the transfer first, then dept A will use the Transfers In section. Conversely, if dept B is the sender of funds the sender and they are keying the transfer first, then dept B will use the Transfers Out section.

Transfers (Continued)

- These directions apply to all transfers, except for the movement of General Funds (non-UKHC and non-UKRF).
 - ♦ The movement of General Funds within the same fund group and business area are to be processed using a budget transfer document during the fiscal year using standard Commitment Items (i.e., Commitment Items that do not begin with a 7*).
 - ♦ As a result, anticipated transfers of General Funds within the same fund group and business area are not to be:
 - budgeted in Axiom using transfer codes;
 - processed using transfer Commitment Items; and
 - processed using a JV (Journal Voucher).



Transfers Tab

- The Transfers tab in Axiom is used to budget the anticipated movement of funds.
- When accessed, the Transfers screen displays two sections:
 - ♦ Transfers In - where funds to be received are keyed
 - ♦ Transfers Out - where funds to be sent to another unit are keyed

1B450 | 00101
1B450_UK - 0101 - RESIDENCE LIFE | Budget Save

BUDGET		TRANSFERS		FUNDS CENTER REVIEW		
Status	TransferID	Dept	Fundctr	Commitment Item	Description	FY 2025 Proposed Future Transfer
Transfers In						
+ Insert additional Transfer In						
Total Transfers In						0.00
Transfers Out						
+ Insert additional Transfer Out						
Total Transfers Out						0.00

Transfers Tab (Continued)

- Both sections will contain information on the Receiver (denoted by In) and Sender (denoted by Out).

Status	TransferID	Dept	Fundctr	Commitment Item	Commitment Item Description	New FY Proposed Future Transfer
Transfers In						
✓	In	8E030_UK_D01011124	8E030_UK 1013160280	740100	Transfers from UK Restricted Funds	2500.00
	Out	8E030_UK_D01011124	8H000_UK 1011653750	750100	Transfers to University Restricted Fur	2500.00
	+ Insert additional Transfer In					
	Total Transfers In					2,500.00
Transfers Out						
✗	Out	8E030_UK_D01011024	8E030_UK 1013160280	750100	Transfers to University Restricted Fur	3000.00
	In	8E030_UK_D01011024	8H000_UK 1011653750	740100	Transfers from UK Restricted Funds	0.00
	+ Insert additional Transfer Out					
	Total Transfers Out					3,000.00

Transfer In

- The following provides instruction on how to budget the receipt of funds by transfer in a Campus Budgeting plan file.
1. On the Transfers screen, click on the Insert additional Transfer In link in the Transfers In section

BUDGET	TRANSFERS
Status	TransferID
Transfers In	
+ Insert additional Transfer In	
Total Transfers In	

Transfer In (Continued)

- In the pop-up window all identified information is required, denoted by the red color on the left side of each box.

Calc Method Variables

Receiver Fundctr
Choose a value for BudgetFUNDCTR. X

Receiver Commitmentitem
Choose a value for BudgetCOMMITMENTITEM. X

Sender Fundctr
Choose a value for BudgetFUNDCTR. X

Sender Commitmentitem
Choose a value for BudgetCOMMITMENTITEM. X

Apply Cancel

- The "X" to the right of each field clears out any data entered/selected.

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Transfer In (Continued)

2. Enter a Funds Center which will receive the funds in the Receiver Fundctr field
 - ♦ Only those Funds Centers associated with the current plan file will be available for selection.

The screenshot shows a dialog box titled "Calc Method Variables" with a close button (X) in the top right corner. Inside the dialog, there is a field labeled "Receiver Fundctr" which is highlighted in yellow. The field contains the text "1013202270 - RESIDENCE LIFE AUXILIARY ACCOUNT" and has a dropdown arrow on the right side. There is also a small "X" icon to the right of the field.

Transfer In (Continued)

3. Enter the appropriate CI (starting with 74* only) to receive the funds in the Receiver Commitmentitem field
 - ♦ The system will search as you type until the appropriate CI is found.
 - ♦ You cannot scroll through the complete list of CIs because only a limited number of CIs are available at a time.

The screenshot shows a dialog box titled "Calc Method Variables" with a close button (X) in the top right corner. It contains two dropdown menus. The first is labeled "Receiver Fundctr" and has the value "1013202270 - RESIDENCE LIFE AUXILIARY ACCOUNT" selected. The second is labeled "Receiver Commitmentitem" and has "74019" selected. A search dropdown is open below it, showing two options: "740190 - Transfers from Housing and Dining" and "740195 - Transfer from Athletics - Unrestricted".

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Transfer In (Continued)

4. Enter the Funds Center of the Sender in the Sender Fundctr field

- ◆ The Sender information refers to where the funds will be transferred from.
- ◆ You MUST collaborate with the Sender unit to identify an appropriate Funds Center.
- ◆ The transfer will also appear on the Sender unit's plan file.

Calc Method Variables

Receiver Fundctr
1013202270 - RESIDENCE LIFE AUXILIARY ACCOUNT

Receiver Commitmentem
740195 - Transfer from Athletics - Unrestricted

Sender Fundctr
1013188000 - UKAA-BASEBALL

Transfer In (Continued)

5. Enter the Sender CI (beginning with 75*) in the Sender Commitmentitem field (1) and click on the Apply button (2)

- ♦ The system will search as you type until the appropriate CI is found.

Calc Method Variables

Receiver Fundctr
1013202270 - RESIDENCE LIFE AUXILIARY ACCOUNT

Receiver Commitmentitem
740195 - Transfer from Athletics - Unrestricted

Sender Fundctr
1013188000 - UKAA-BASEBALL

Sender Commitmentitem
750120 - Transfers to UK Unrestricted Funds

Apply Cancel

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Transfer In (Continued)

- The Transfers In section will show two rows representing the Receiver (In) and Sender (Out) information.
 - ♦ The Sender portion will be grayed out as the transfer is not yet completed.
 - ♦ A red X shown at the top left will indicate the transfer is incomplete and is awaiting the Sender to complete the transfer budget transaction.

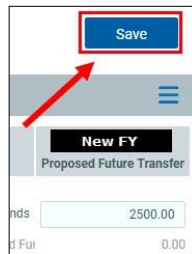
BUDGET		TRANSFERS*		FUNDS CENTER REVIEW			
Status	TransferID	Dept	Fundctr	Commitment Item	Commitment Item Description	FY 2025 Proposed Future Transfer	
x	In	1B450_UK_D01011125	1B450_UK	1013202270	740195	Transfer from Athletics - Unrestrictec	0.00
	Out	1B450_UK_D01011125	12B00_UK	1013188000	750120	Transfers to UK Unrestricted Funds	0.00
+ Insert additional Transfer In							
Total Transfers In							0.00

Transfer In (Continued)

6. Enter the amount to be transferred into the Proposed Future Transfer amount column

Status	TransferID	Dept	Fundctr	Commitment Item	Commitment Item Description	FY 2025 Proposed Future Transfer
Transfers In						
x In	1B450_UK_D01011125	1B450_UK	1013202270	740195	Transfer from Athletics - Unrestricted	2500.00
Out	1B450_UK_D01011125	12B00_UK	1013188000	750120	Transfers to UK Unrestricted Funds	0.00
+ Insert additional Transfer In						
Total Transfers In						2,500.00

7. Click on the Save button in the top-right corner of the screen



Transfer In (Continued)

- The incomplete transfer will appear in the Transfers Out section of the Sender's plan file.

12B00 00500							Save
12B00_UK - 0500 - MEN'S SPORTS Budget							
BUDGET		TRANSFERS		FUNDS CENTER REVIEW			
Status	TransferID	Dept	Fundctr	Commitment Item	Commitment Item Description	FY 2025 Proposed Future Transfer	
Transfers In							
+ Insert additional Transfer In							
Total Transfers In						0.00	
Transfers Out							
x	Out	1B450_UK_D01011125	12B00_UK	1013188000	750120	Transfers to UK Unrestricted Funds	0.00
	In	1B450_UK_D01011125	1B450_UK	1013202270	740195	Transfer from Athletics - Unrestricted	2500.00
+ Insert additional Transfer Out							
Total Transfers Out						0.00	

Transfer In (Continued)

- The Sender will then complete the transfer by entering the funds needed to balance the transfer.
- Once entered, the transfer is complete, and a green check will replace the red X indicating a completed transfer budget.
 - ♦ The green check will also display on the Receiver plan file.

Transfers Out						
✓	Out	1B450_UK_D01011125	12800_UK	1013188000	750120	Transfers to UK Unrestricted Funds 2500.00
	In	1B450_UK_D01011125	1B450_UK	1013202270	740195	Transfer from Athletics - Unrestrictec 2500.00
+ Insert additional Transfer Out						
Total Transfers Out						2,500.00

Transfers In						
✓	In	1B450_UK_D01011125	1B450_UK	1013202270	740195	Transfer from Athletics - Unrestrictec 2500.00
	Out	1B450_UK_D01011125	12800_UK	1013188000	750120	Transfers to UK Unrestricted Funds 2500.00
+ Insert additional Transfer In						
Total Transfers In						2,500.00

Transfer Out

- Conversely, if the Sender makes the transfer budget entry first, using the + Insert additional Transfer Out link in the Transfers Out section, the Sender information is requested first.



- In the pop-up window all identified information is required, denoted by the red color the left side of each box.

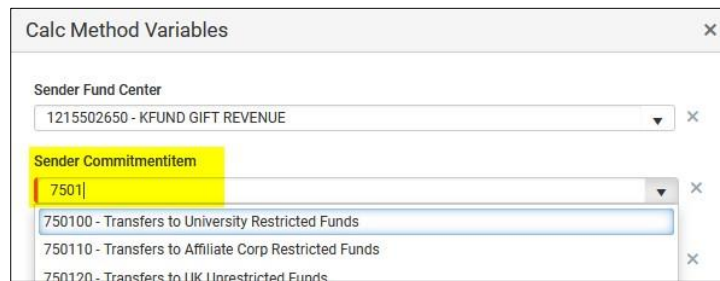
Transfer Out (Continued)

1. Enter a Funds Center which will send the funds in the Sender Fund Center field
 - ♦ Only those Funds Centers associated with the current plan file will be available for selection.

The screenshot shows a dialog box titled "Calc Method Variables" with a close button (X) in the top right corner. Inside the dialog, there is a label "Sender Fund Center" above a dropdown menu. The dropdown menu is open, showing the selected option "1215502650 - KFUND GIFT REVENUE" with a small downward arrow on the right. There is also a small "X" button to the right of the dropdown menu.

Transfer Out (Continued)

2. Enter an appropriate CI (beginning with 75*) to send the funds in the Sender Commitmentitem field
 - ♦ The system will search as you type until the appropriate CI is found.
 - ♦ You cannot scroll through the complete list of CIs because only a limited number of CIs are available at a time.



The screenshot shows a dialog box titled "Calc Method Variables" with a close button (X) in the top right corner. It contains two fields:

- Sender Fund Center:** A dropdown menu with the value "1215502650 - KFUND GIFT REVENUE" selected.
- Sender Commitmentitem:** A dropdown menu with "7501" selected. A search dropdown is open below it, showing a list of options:
 - 750100 - Transfers to University Restricted Funds
 - 750110 - Transfers to Affiliate Corp Restricted Funds
 - 750120 - Transfers to UK Unrestricted Funds

Transfer Out (Continued)

3. Enter a Funds Center for the Receiver to receive the funds in the Receiver Fund Center field
 - ♦ The Receiver information refers to where the funds will be transferred to.
 - ♦ You MUST collaborate with the Receiver unit to identify an appropriate Funds Center.
 - ♦ The transfer will also appear on the Receiver unit's plan file.

The screenshot shows a dialog box titled "Calc Method Variables" with a close button (X) in the top right corner. It contains three dropdown menus, each with a clear button (X) to its right:

- Sender Fund Center:** 1215502650 - KFUND GIFT REVENUE
- Sender CommitmentItem:** 750100 - Transfers to University Restricted Funds
- Receiver Fund Center:** 1215503160 - EVELYN DAVIS NEWTON DIVING SCHOLARSHIP (This field is highlighted in yellow)

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Transfer Out (Continued)

4. Enter the Receiver CI (starting with 74* only) in the Receiver CommitmentItem field (1) and click on the Apply button (2)

- ♦ The system will search as you type until the appropriate CI is found.

Calc Method Variables

Sender Fund Center
1215502650 - KFUND GIFT REVENUE

Sender CommitmentItem
750100 - Transfers to University Restricted Funds

Receiver Fund Center
1215503160 - EVELYN DAVIS NEWTON DIVING SCHOLARSHIP

Receiver CommitmentItem
740100 - Transfers from UK Restricted Funds

Apply Cancel

Transfer Out (Continued)

- The Transfers Out section will show two rows representing the Sender (Out) and Receiver (In) information.
 - ♦ The Receiver portion will be grayed out as the transfer is not yet completed.
 - ♦ A red X shown at the top left will indicate the transfer is incomplete and is awaiting the Receiver to complete the transfer budget transaction.

Transfers Out							
x	Out	12P00_UK_D05001025	12P00_UK	1215502650	750100	Transfers to University Restricted Fur	0.00
	In	12P00_UK_D05001025	12S00_UK	1215503160	740100	Transfers from UK Restricted Funds	0.00
		+ Insert additional Transfer Out					
		Total Transfers Out					0.00

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Transfer Out (Continued)

5. Enter the amount to be transferred into the Proposed Future Transfer amount column

Status	TransferID	Dept	Fundctr	Commitment Item	Commitment Item Description	FY 2025 Proposed Future Transfer	
Transfers In							
+ Insert additional Transfer In							
Total Transfers In						0.00	
Transfers Out							
x	Out	12P00_UK_005001025	12P00_UK	1215502650	750100	Transfers to University Restricted Fun	3000.00
	In	12P00_UK_005001025	12S00_UK	1215503160	740100	Transfers from UK Restricted Funds	0.00
+ Insert additional Transfer Out							
Total Transfers Out						3,000.00	

6. Click on the Save button in the top-right corner of the screen



Transfer Out (Continued)

- The Receiver will then complete the transfer by entering the funds needed to balance the transfer.
- Once entered, the transfer is complete, and a green check will replace the red X indicating a completed transfer budget.
 - ♦ The green check will also display on the Sender plan file.

Transfers In						
<input checked="" type="checkbox"/>	In	12P00_UK_D05001025	12S00_UK	1215503160	740100	Transfers from UK Restricted Funds 3000.00
<input checked="" type="checkbox"/>	Out	12P00_UK_D05001025	12P00_UK	1215502650	750100	Transfers to University Restricted Fur 3000.00
+ Insert additional Transfer In						
Total Transfers In						3,000.00

Transfers Out						
<input checked="" type="checkbox"/>	Out	12P00_UK_D05001025	12P00_UK	1215502650	750100	Transfers to University Restricted Fur 3000.00
<input checked="" type="checkbox"/>	In	12P00_UK_D05001025	12S00_UK	1215503160	740100	Transfers from UK Restricted Funds 3000.00
+ Insert additional Transfer Out						
Total Transfers Out						3,000.00

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Transfers With Special Circumstances

- The University Budget is built on current funds only.
- Occasionally a unit may need funds from a non-current fund source (e.g. endowment or plant) to support necessary expenses in their unit.
 - ♦ In these instances, funds should be budgeted as a transfer from the non-current fund to the current fund.
- Similarly, certain units receive funding from the Hospital for services provided.
 - ♦ In these instances, since the Hospital's budget is set up differently in Axiom, a similar process as described on the following slides must be followed.

Transfers With Special Circumstances (Commitment)

- Transfer budgets in Axiom are entered as Sender/Receiver combination to complete the budget. Thus, in instances where non-current funds are needed, the process for budgeting will be as follows:
 1. From the Transfers tab (Transfers In section) the receiving unit will key the receipt of the funds from the non-current source into the plan file where the funds will be used by entering the Receiver Funds Center and the appropriate CI from the drop-down list.

Calc Method Variables

Receiver Fundctr
1215351230 - U.K. WOMEN WRITER'S ENDOWMENT FUND

Receiver Commitmentitem
740220 - Transfers from UK Endowments

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Transfers With Special Circumstances (Commitment)

2. The receiving until will also key the funds provided by the non-current fund source using a Funds Center of 9999999999 and the appropriate CI, and then click on the Apply button.
 - This represents the Sender side of the transfer and will be finalized by the University Budget Office.

Sender Fundctr
9999999999 - NON CURRENT FUND CENTER
Sender Commitmentitem
750100 - Transfers to University Restricted Funds
<input type="button" value="Apply"/> <input type="button" value="Cancel"/>

Transfers With Special Circumstances (Commitment)

3. After clicking the Apply button, the entry will display in the plan file and the budget amount for the transfer can be entered.

BUDGET		TRANSFERS*		FUNDS CENTER REVIEW		New FY		
Status	TransferID	Dept	Fundctr	Commitment Item	Description	Proposed Future Transfer		
Transfers In								
x In	8E620_UK_D01011024	8E620_UK	1215351230	740220	Transfers from UK Endowments	<input type="text" value="0.00"/>	0.00	
Out	8E620_UK_D01011024	99999_UK	9999999999	750100	Transfers to University Restricted Fu		0.00	
+ Insert additional Transfer In								
Total Transfers In								0.00
Transfers Out								
+ Insert additional Transfer Out								
Total Transfers Out								0.00

Funds Center Review and Grant Review Tabs

- The Funds Center Review tab displays an Axiom report that summarizes the Proposed Future Budget data, which can be used for a quick view of the new year budgets by account.
- The report is arranged into the budget categories (Revenues, Personnel Expenses and Other Expenses) that shows the budget by Funds Center (or Grant number if a Land Grant in the Grant Review tab).



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Any Questions?

- Non-Position Budgeting Overview
- Accessing Non-Position Budgeting
- Funds Center/Land Grant Selection
- Budget Tab
- Budget Groups
- Keying Proposed Future Budget
- Commitment Item Tips
- Transfers In
- Transfers Out
- Transfers With Special Circumstances
- Funds Center Review and Grant Review Tabs



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Unit 3



Labor Planning

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Personnel-Related Information

- Position budgets are those in CIs beginning with 51* and 52* that are associated with a specific position.
 - ♦ Budgets in these CIs that are not associated with a position are entered using the “Budgeting” tabs.

- Position-related data updates twice in the Axiom system during the budget development process:
 - ♦ The first time is usually at the end of January when a snapshot of the salaries is captured for determining the salary pool.
 - ♦ The second time occurs just before the Axiom system opens to enter personnel-related budgets and salary proposals – usually in April or May.

Personnel-Related Information (Continued)

- Regular and non-regular position budgets will be keyed by position.
- All active positions will be available in Axiom, regardless of whether they are budgeted or not.
- Hospital positions, those in beginning with H* (excluding MG3*), will not system for their budgets. These budgets are prepared by and provided separately to the UBO.



UKHC

Benefits

- Benefits budgets will be displayed in the Funds Center that is associated with the position budgets they support.
- Some Land Grant benefits will be “swept” off the grant and moved an associated Funds Center the position.
- NOTE: It is expected that adequate benefit budgets are placed on each position as calculated by the system. The budget process does not endorse changing the benefits budget for an Area into one Funds Center.



Departmental Field Notes

- Each position in SAP-HR is associated with an Organizational Unit (Org Unit). An Org Unit is an 8-digit number beginning with a 3* and is defined as the position's "home" department.



- The Org Unit description is the position's 5-digit UK department number. The Axiom system uses this 5-digit UK department number as the plan file to access and display the position data regardless of how the position costs are allocated. This means, each position will display once.

Departmental Field Notes (Commitment)

- All active positions (filled and vacant) will be displayed even if the positions have no budgets.



Tips

- Delimit (end) all unneeded positions in SAP prior to the start of the budget development process.
- Save the data in each plan file and each account before moving to another.
- Save early, save often.



Labor Planning

- Personnel position budgeting and salary proposals are prepared in the Labor Planning tab in Axiom.
- Labor planning in Axiom is divided into three categories/tabs:
 - ♦ Regular Position Planning- Used for budgets and salary proposals for regular positions only
 - ♦ Non-Regular Position Budget - Used for non-regular position budgets only
 - ♦ Non-Regular Salary Planning - Used for non-regular salary proposals only

8F100_UK - B&E ACCOUNTANCY New FY Labor Planning		
REGULAR POSITION PLANNING	NON REGULAR POSITION BUDGET	NON REGULAR SALARY PLANNING

~~Regular Positions~~ • Regular

positions are defined as:

- ◆ Positions with Personnel Subareas of 0001 thru 0005:

- 0001 = Reg FT
- 0002 = Reg PT - Faculty
- 0003 = Reg PT >.74
- 0004 = Reg PT .50 - .74
- 0005 = Reg PT .20 - .49

- However, in Axiom, positions with Personnel Subareas of 0001 thru 0005 with an accompanying ZJ relationship are treated as non-regular (see the Non-Regular Position Budgeting section in this Unit).

Regular Positions (Continued)

- ◆ ZJ is a relationship that is placed on a position in SAP when the position should not participate in the regular salary proposal process during budget development.
 - This is because of where the funding for the position comes from and how decisions for the salary are made.

- ◆ Only the Colleges of Agriculture and Medicine have these ZJ relationships.

- ◆ The salary proposal process for these positions occurs in the Non Regular Salary Planning tab in Axiom.

Regular Positions (Continued)

- The budgets for regular position are determined based on the salary and benefits that are anticipated to be paid out on a position in the new year regardless of funding source.
- When regular positions are filled, the initial salary budget is determined by the salary of the employee in the position.
- ♦ Occasionally, there are instances where this rule does not apply (e.g., positions that are not fully funded); adjustments must be made to accommodate for this difference.

Regular Position Planning Tab

- The Regular Position Planning tab is used to budget and create salary proposals for regular positions only for the upcoming fiscal year.
- To accomplish this:
 1. Access the Axiom system and select the Labor Budgeting tab,
 2. Find the appropriate plan file by either scrolling through the available list of plan files or use the filter/search feature,
 3. Open a specific plan file using the Open plan file icon located on the left side of the plan file department number, and
 4. Select the Regular Position Planning tab.

Regular Position Planning Tab (Continued)

- The initial screen displays a list of valid positions (filled and vacant) with the respective current salaries of each filled position in the selected plan file. The data is displayed by position, pernr (personnel number) and employee name within the following employee groups:

- ♦ Faculty
- ♦ Exempt Staff
- ♦ Non-Exempt Staff

REGULAR POSITION PLANNING	
Position ID	Position Description
Faculty	
50102725	Associate Professor
50102727	Assistant Professor

Non-Exempt Staff	
50102730	Department Academic Administration Assoc.

Regular Position Planning Tab (Continued)

- If a position is vacant, the Pernr and Employee Name will be displayed as "Vacant".

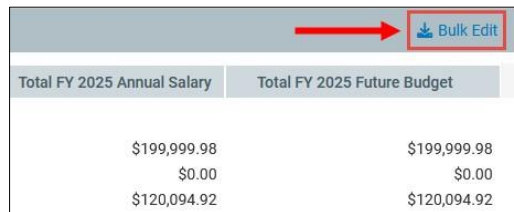
Position ID	Position Description	Pernr	Employee Name
Faculty			
50102725	Associate Professor		
50102727	Assistant Professor	Vacant	Vacant
50102731	Associate Professor		
50102732	Associate Professor		
50102734	Assistant Professor		
50102735	Associate Professor	Vacant	Vacant
50102736	Professor		

- When the new year budgets and salary proposals are entered, they will be reflected in this summary screen.

REGULAR POSITION PLANNING				NON-REGULAR POSITION BUDGET		NON-REGULAR SALARY PLANNING			
Position ID	Position Description	Pernr	Employee Name	FY 2024 Annual Base Pay	FY 2024 Annual Stipend	Total FY 2025 Adjustments	FY 2025 Annual Stipend	Total FY 2025 Annual Salary	Total FY 2025 Future Budget
Faculty									
50102725	Associate Professor	00000010		\$199,999.98	\$0.00	\$0.00	\$0.00	\$199,999.98	\$199,999.98
50102727	Assistant Professor	Vacant		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
50102731	Associate Professor	00000543		\$120,094.92	\$0.00	\$0.00	\$0.00	\$120,094.92	\$120,094.92
50102732	Associate Professor	00049165		\$180,000.00	\$0.00	\$0.00	\$0.00	\$180,000.00	\$180,000.00
50102734	Assistant Professor	00070998		\$240,000.03	\$0.00	\$0.00	\$0.00	\$240,000.03	\$240,000.03
50102735	Associate Professor	Vacant		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
50102736	Professor	00000500		\$295,599.96	\$0.00	\$0.00	\$0.00	\$295,599.96	\$295,599.96
50102738	Professor	00002003		\$234,999.99	\$15,000.03	\$0.00	\$15,000.03	\$250,000.02	\$250,000.02
50102739	Associate Professor	00062005		\$240,000.01	\$0.00	\$0.00	\$0.00	\$240,000.01	\$240,000.01
50102740	Associate Professor	00049221		\$120,999.96	\$0.00	\$0.00	\$0.00	\$120,999.96	\$120,999.96

Bulk Edit

- The Bulk Edit feature is used to prepare the salary proposals and (subsequently) the position budgets for each filled position. The employee's salary forms the basis for the regular position budgets.
- To accomplish this, select the Bulk Edit icon at the top-right corner of the plan file screen.



Total FY 2025 Annual Salary	Total FY 2025 Future Budget
\$199,999.98	\$199,999.98
\$0.00	\$0.00
\$120,094.92	\$120,094.92

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Bulk Edit (Continued)

- A list of only filled positions will appear and salary changes for the new fiscal year are made in the columns in accordance with the salary reasons identified. The salary reasons are:
 - ♦ Merit, Stipend, Promotion, Equity, Market, Scale
 - ♦ Leaving – Use when an employee will be leaving the University in the new year. The salary is removed using this reason code.
 - ♦ Sabbatical – Use when an employee is returning or going on sabbatical with partial pay in the new year. Do not use this code if the employee will be on full pay during sabbatical.
 - ♦ Other – Use for reasons other than those listed above.

Merit	Stipend	Promotion	Equity	Market	Scale	Leaving	Sabbatical	Other
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

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Bulk Edit (Continued)

- After entry, click the Save button located at the bottom-right of the screen, and all data will update and save.
- Click Close (located at the bottom-right of the screen) to go back to the previous summary screen.

\$0.00	\$0.00	\$C ▾
▶		
<div style="border: 2px solid red; display: inline-block; padding: 5px;"> Save Close </div>		

Bulk Edit (Continued)

- The total new proposed annual base salary and stipend will total in the appropriate columns and will be translated to the employee/position card where the position budget will be determined for both the salary and benefits.
- The new year position budget and salary proposal is complete if no changes to the position distribution are needed or if the position salary budget should be equal to the employee's proposed salary.
- You may now select the next plan file.

Bulk Edit (Continued)

- NOTE: The system provides a mechanism for an “Across the Board” increase, if the University decides to provide one. The system administrators can make these entries, which will filter into each plan file automatically.



Employee/Position Card

- The Employee/Position Card provides position and employment information for each regular position in four sections.

Position Detail: **Employee Name** Associate Professor - 8F100_UK - B&E ACCOUNTANCY (8F100_UK)

Position 1		Employment 2		Regular Pay 3		
Associate Professor		Employee Name		Proposed Salary: \$199,999.98		
Position ID:	5010	Employee ID:	0001	Base Salary:	Adj. %	Adj. \$
Start Date:	3/31/2006	Pay Type:	Salary	ATB: 0.0% on 07/01/24	0.0%	\$0.00
End Date:	12/31/9999	Working Hours:	2,080	Merit:	0.0%	\$0.00
Category:	Faculty	FTE:	1.00	Stipend:	\$0.00	0.0%
Personnel SubArea:	0001	Spread:	Even	Other Salary Adjustments:	0.0%	\$0.00
FY2024 Rec Sal Bud	200,000.00	Coverage Code:	EE	Proposed Budget:	\$0.00	\$199,999.98

Distributions 4				
Dept	Grant	Funds Center	Distribution %	Total
8F100_UK	GMNR	1012004360	Distribution Override	
			Distribution	100.00%
			Fixed Benefits	\$7,368.00
			Variable Benefits	\$34,755.20
+ Insert New Distribution			Total Distributed Salary \$	\$199,999.98
			Total % Allocated	100.0%
			Total Benefits	\$42,123.20

Employee/Position Card: Position Section

- The Position section provides information about the position including the position title, the start and end dates of the position, the position type, and the current year recurring budget.

Position	
Associate Professor	
Position ID:	5010
Start Date:	3/31/2006
End Date:	12/31/9999
Category:	Faculty
Personnel SubArea:	0001
FY2024 Rec Sal Bud	200,000.00

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Employee/Position Card: Employment Section

- The Employment section provides information about the employee in the position including the employee's name, hours worked, FTE, etc.

Employment	
Employee Name	
Employee ID:	0001
Pay Type:	Salary
Working Hours:	2,080
FTE:	1.00
Spread:	Even
Coverage Code:	EE

Employee/Position Card: Regular Pay Section

- The Regular Pay section displays the proposed new year salary that was transferred from Bulk Edit section. This section also displays the position budget that is equal to the salary of the employee filling the position. An input box (1) is also provided for any changes needed to the position budget. A budget change will be needed if the position is not currently fully funded.

Regular Pay			
Proposed Salary:			\$199,999.98
Base Salary:	Adj. %	Adj. \$	\$199,999.98
ATB: 0.0% on 07/01/24	0.0%	\$0.00	\$0.00
Merit:	0.0%	\$0.00	\$0.00
Stipend: \$0.00	0.0%	\$0.00	\$0.00
Other Salary Adjustments:	0.0%	\$0.00	\$0.00
Proposed Budget:		1	\$0.00
			\$199,999.98

Employee/Position Card: Distributions Section

- The (Cost) Distributions section displays the position’s 1018 cost distribution as well as the benefits covered by the position.

Distributions					
Dept	Grant	Funds Center		Distribution %	Total
8F100_UK	GMNR	1012004360	Distribution Override	<input type="text"/>	
			Distribution	100.00%	\$199,999.98
			Fixed Benefits	\$7,368.00	\$7,368.00
			Variable Benefits	\$34,755.20	\$34,755.20
+ Insert New Distribution			Total Distributed Salary \$		\$199,999.98
			Total % Allocated		100.0%
			Total Benefits		\$42,123.20

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Changing the Salary Budget on a Regular Position

- To change the salary budget on a filled or vacant regular position:
 1. Access the Employee/Position card for a specific position by clicking the Distribution Detail icon located on the left-hand side of the Position ID in the plan file

Position ID	Position Description
Faculty	
 50102725	Associate Professor
 50102727	Assistant Professor
 50102731	Associate Professor
 50102732	Associate Professor
 50102734	Assistant Professor
 50102735	Associate Professor

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Changing the Salary Budget on a Regular Position (Cont'd)

- The new year proposed salary (1) and budget data (2) in the Regular Pay section of the Employee/Position card is populated from the Bulk Edit entry screen.

Regular Pay			
Proposed Salary:			1 \$199,999.98
Base Salary:	Adj. %	Adj. \$	\$199,999.98
ATB: 0.0% on 07/01/24	0.0%	\$0.00	\$0.00
Merit:	0.0%	\$0.00	\$0.00
Stipend: \$0.00	0.0%	\$0.00	\$0.00
Other Salary Adjustments:	0.0%	\$0.00	\$0.00
Proposed Budget:		\$0.00	2 \$199,999.98

- The position salary budget is reflected in the Proposed Budget field from which the benefits are calculated.

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Changing the Salary Budget on a Regular Position (Cont'd)

- To change the position budget, enter the changed amount (a positive or negative value) in the Proposed Budget input field (1) and press Enter. The Proposed Budget amount will update accordingly (2).
- For example, if the salary of a filled position is \$199,999.98 but the available budget for the position is \$177,375.45, then a negative entry of -\$22,624.53 must be made.

Regular Pay			
Proposed Salary:			\$199,999.98
Base Salary:	Adj. %	Adj. \$	\$199,999.98
ATB: 0.0% on 07/01/24	0.0%	\$0.00	\$0.00
Merit:	0.0%	\$0.00	\$0.00
Stipend:	\$0.00	0.0%	\$0.00
Other Salary Adjustments:	0.0%	\$0.00	\$0.00
Proposed Budget:		(1) (\$22,624.53)	(2) \$177,375.45

Changing the Salary Budget on a Regular Position (Cont'd)

- If a position is vacant, use the Proposed Budget input field to enter a budget for a vacant line as needed.
 - ♦ The current year recurring budget is seen in the Position section.

Position	
Associate Professor	
Position ID:	5010
Start Date:	3/31/2006
End Date:	12/31/9999
Category:	Faculty
Personnel SubArea:	0001
FY2024 Rec Sal Bud	200,000.00

- The associated benefits will be calculated based on the Proposed Budget amount.

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Changing the Distribution on a Regular Position

- The position cost distribution is displayed in the Distributions section of the Employee/Position card. The current 1018 cost distribution is displayed by Department, Grant, and Funds Center with the Distribution percentages associated with each account.

Distributions					
Dept	Grant	Funds Center		Distribution %	Total
8F100_UK	GMNR	1012004360	Distribution Override	<input type="text"/>	
			Distribution	100.00%	\$177,375.45
			Fixed Benefits	\$7,368.00	\$7,368.00
			Variable Benefits	\$31,964.01	\$31,964.01
+ Insert New Distribution			Total Distributed Salary \$		\$177,375.45
			Total % Allocated		100.0%
			Total Benefits		\$39,332.01

Changing the Distribution on a Regular Position

- To change the cost distribution for the new year, click the Insert New Distribution link (1), enter the new Funds Center (Fundctr) and Grant (2), and then click the Apply button (3).

- NOTE: If the position's cost distribution is not a land grant, the Grant value must be entered as GMNR - (Grants Management Not Relevant (not a sponsored project)).

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Changing the Distribution on a Regular Position

- Enter the appropriate Distribution percentages in the input fields for each Funds Center (1), and then click Save (2). The salary and benefits budgets will calculate accordingly.

Dept	Grant	Funds Center	Distribution Override	Distribution %	Total
8F100_UK	GMNR	1012004360	Distribution Override	0.00%	
			Distribution	0.00%	\$0.00
			Fixed Benefits	\$0.00	\$0.00
			Variable Benefits	\$0.00	\$0.00
7A760_UK	GMNR	1012000670	Distribution Override	100.00%	
			Distribution	100.00%	\$177,375.45
			Fixed Benefits	\$7,368.00	\$7,368.00
			Variable Benefits	\$31,964.01	\$31,964.01
+ Insert New Distribution			Total Distributed Salary \$		\$177,375.45
			Total % Allocated		100.0%
			Total Benefits		\$39,332.01

Changing the Distribution on a Regular Position

- NOTE:

- ♦ If the distribution on the current account is not needed, enter a "0" as the distribution percentage in the Distribution % field.
- ♦ Enter the percentage as a 4-digit number, e.g., .4682 → this will translate to 46.82%.
- ♦ The total percentage should add to 100.00%



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~~Benefits Calculations~~ • Benefits are calculated in and displayed in two fields on the employee card as follows:

Fixed Benefits	\$7,368.00	\$7,368.00
Variable Benefits	\$31,964.01	\$31,964.01

- ◆ Fixed Benefits – Represents employee’s health benefits only
- ◆ Variable Benefits – Calculated based on the following benefit rates:
 - a) Life
 - b) Miscellaneous Benefit Rate (MBR)
 - c) Retirement
 - d) FICA
 - e) Accidental Death and Dismemberment (ADD)
 - f) Health – only if the position is vacant

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Non-Regular Position Budgeting Features

- Non-Regular positions are those in Personnel Subareas other than 0001-0005 or positions with ZJ relationships.
- Budgeting for non-regular positions occurs at the same time as the regular position budgeting and salary proposal processes.



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Non-Regular Position Budgeting Features (Continued)

- These positions are organized by employee group in the following categories:

- ◆ Faculty
- ◆ Exempt Staff
- ◆ Non-Exempt Staff
- ◆ Post Docs
- ◆ Students
- ◆ All Other

REGULAR POSITION PLANNING		NON REGULAR POSITION BUDGET	
Position Cost Distribution Department	Funds Center	Grant	
Faculty ←			
50102726 - Professor			
8F100_UK	1012004360	GMNR	
8F100_UK	1012817050	GMNR	
+ Insert New Distribution			
50102741 - Associate Professor			
8F100_UK	1012004360	GMNR	
+ Insert New Distribution			
51042566 - Instructor			
8F100_UK	1012004360	GMNR	
+ Insert New Distribution			
Students ←			
50110725 - Student/Non-Work Study			
8F100_UK	1012004360	GMNR	
+ Insert New Distribution			
51025075 - Student/Non-Work Study			

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Non-Regular Position Budgeting Features (Continued)

- The basis for these budgets are the current year recurring budgets by position.
- All active positions classified as non-regular are reflected in the Non-Regular Position Budget tab in the associated plan files regardless of whether they are budgeted or not.
 - Each plan file reflects the active positions in the org unit (home) department and the current Funds Center and/or Grant that are associated with the 1018 cost distribution. The system will assign the Commitment Item automatically.

Non-Regular Position Budget Entries

- Use the following steps to verify/update the budget entries for the non-regular positions:
 1. Access the Axiom system and select the Labor Budgeting tab
 2. Select and open a plan file
 3. Select the Non Regular Position Budget tab



Non-Regular Position Budget Entries (Continued)

4. Scroll through the list of positions and determine which ones need a budget for the new fiscal year
5. Enter the changed amount in the (new fiscal year's) Adjustment input field - The benefits will update accordingly.
 - For example, if a position has a current salary budget of \$122,767.44 and the new year salary budget should be \$114,767.44, the changed amount to enter is -\$8,000 (1).

FY 2024 Recurring Budget	FY 2025 Adjustments	FY 2025 Future Budget
122,767.44	1 (8,000.00)	114,767.44
		114,767.44
134,014.80	2 3,250.00	137,264.80
		137,264.80

- A positive value is entered to increase the new year salary budget (2).

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Non-Regular Position Budget Entries (Continued)

- 6. Click on the Save button - The Total Future Budget column (2) will update with both the new year salary budget and the benefits budgets.

8F100_UK
8F100_UK - B&E ACCOUNTANCY | 2025 Labor Planning 1 Save

REGULAR POSITION PLANNING		NON REGULAR POSITION BUDGET			NON REGULAR SALARY PLANNING			
Commitment Item	FY 2024 Recurring Budget	FY 2025 Adjustments	FY 2025 Future Budget	FY 2025 Benefits	2 FY 2025 Total Future Budget	Distribution	Percent Check	
	122,767.44	(8,000.00)	114,767.44	0.00	114,767.44	100.00%		
511011			114,767.44	0.00	114,767.44	100.00%		
	134,014.80	3,250.00	137,264.80	0.00	137,264.80	100.00%		
511011			137,264.80	0.00	137,264.80	100.00%		

- NOTE: If the new year salary budget is the same as the current year budget, then just save the form.

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Changing the Distribution on a Non-Regular Position

- Should the cost distribution for a non-regular position need to be changed, follow the same instructions listed previously in this unit for regular positions.



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Non-Regular Position Salary Planning

- The Non Regular Salary Planning tab in Axiom is used to enter the proposed new year salaries only for employees in positions that are defined as non-regular.
- The data is displayed by Position (number), Employee Name, and Pernr within the various employee groups as follows:

- ◆ Faculty
- ◆ Exempt Staff
- ◆ Non-Exempt Staff
- ◆ Post Docs
- ◆ Students
- ◆ All Other

Position Employee Name	Pernr
All Other ←	
51057145 - Instructor [Redacted]	1107 [Redacted]
Faculty ←	
50102726 - Professor [Redacted]	0000 [Redacted]
Non-Exempt Staff ←	
Students ←	
51028259 - Student/Non-Work Study [Redacted]	2006 [Redacted] 2007 [Redacted]

Non-Regular Position Salary Planning (Continued)

To make salary proposal entries into this tab:

1. Access the Axiom system and select the Labor Budgeting tab
2. Select and open a plan file
3. Select the Non Regular Salary Planning tab
4. Enter the changed amount (to be added or deducted) from the current year salary in the new fiscal year's Adjustment field (1) The new year proposed salary will calculate accordingly (2).

FY 2024	FY 2025	FY 2025
Annual Base Pay	Adjustment	Annual Base Pay
	1,750.00	30,550.00
28,800.00	1,750.00	30,550.00

5. Click on the Save button in the upper-right corner

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Non-Regular Position Salary Planning (Continued)

- NOTE: If no changes to the current year salary are needed and the new year proposed salary is the same as the current year, then just save the form.



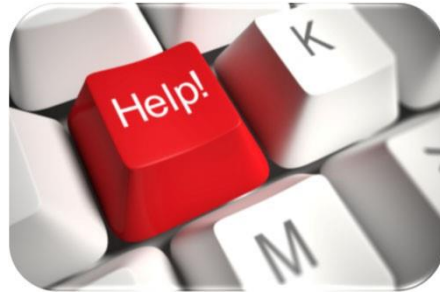
Any Questions?

- Labor Planning
- Regular Position Planning
- Bulk Edit
- Employee/Position Card
- Non-Regular Position Budget
- Non-Regular Salary Planning



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Unit 4



Troubleshooting and Help

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Keys to Minimize Budget/ABS Issues

- Prepare budget data for entry first before accessing ABS
- Save early, save often
- Double-check your data entry before exiting a plan form
- Run Axiom reports to check your data



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ABS System/Technical Issues

- For any ABS technical issues, contact the Budget listserv:
 - ♦ Budget-Issues@lsv.uky.edu
- Always include the following in your email correspondence:
 - ♦ Contact number where you can be reached
 - ♦ File name
 - ♦ Description of issue
 - ♦ All applicable screen shots



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Budgeting Issues

- For any budgeting process issues, first contact your AFO:
 - ♦ Kristen Cheser – Provost Area
 - ♦ Judy Duncan – Research Area
 - ♦ Melissa Gleason – UK Athletics Area
 - ♦ Grace Hahn – Student Success Area
 - ♦ Brad West – President/EVPFA Areas



send an email to the Budget listserv:

- ♦ Budget-Issues@lsv.uky.edu ♦ Include the following:
 - Screen shot of ABS screen
 - Description of the issue
 - Contact number where you can be reached

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Any Final Questions?

- Unit 1 - Axiom Budget System (ABS) Overview
- Unit 2 - Non-Position Budgeting
- Unit 3 - Labor Planning
- Unit 4 - Troubleshooting and Help

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