



Release Notes
Axiom Budgeting for Higher
Education
Version 2019.1

KaufmanHall

AXIOM

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Summary

Kaufman Hall is pleased to announce the 2019.1 release of Axiom Budgeting. Each product release provides new features, enhancements, and configuration options to meet your needs. Many of these features and enhancements are a direct result of your feedback and suggestions.

Summary of the upgrade process:

1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.
2. **Schedule an installation date** – Contact support@kaufmanhall.com or your implementation consultant, and they will confirm an installation period with you.
3. **Back up Axiom database** – Kaufman Hall will confirm that you have a current backup of your Axiom database before applying the upgrade.
4. **Apply upgrade** – Arrange with your IT staff on an agreeable time for scheduled downtime to apply the program and product upgrade. This includes any post-upgrade hot-fix files that need to be copied into the system to address any post-release known issues that have been resolved.
5. **Complete manual updates** – After installing the upgrade, review any manual setup steps needed to enable features for this version.

Support

As always, we appreciate your support of Kaufman Hall and look forward to continuing to meet your financial management needs. If you have any questions about your upgrade, contact Kaufman Hall Software Support at 1-888-543-6833 or support@kaufmanhall.com.

Training

Kaufman Hall offers multiple training options for our customers. These courses are part of your maintenance agreement and are free of charge. We strongly urge you to take advantage of all training options.

For a complete listing of our courses, please visit www.kaufmanhall.com.

Product upgrade notes

When upgrading to the 2019.1 version of Axiom Budgeting, keep in mind the following:

- This product upgrade contains updated templates, calculation methods, driver files, and remediated defects.
- KHA delivered reports may be replaced. Any report that you saved under a different name or created new will remain untouched. Replaced reports are available in Document History, if needed.
- Any KHA delivered report that was moved to a new location will automatically move back to its original location.
- KHA product templates and calculation method libraries will be replaced.
- Product task panes will be replaced.
- Process definitions will not be replaced.
- Security roles and sub-systems will be reset to their configured settings. All user security exceptions you may have made will remain intact.
- Specific items configured as part of your company or organization's implementation such as imports, exports, driver files, and process management files, will remain as is. Any required modifications to these areas are covered in the release notes, if required.

New features summary

This section includes a description for each new feature included in this release.

Budget Request tab on homepage

Kaufman Hall has enhanced Axiom Budgeting capabilities for 2019.1 with an optional license to create new budget requests. Users with the Axiom Budget Request license now have the Budget Requests tab on the Axiom Budgeting home page. The Budget Request tab provides you with an overview of all budget requests that you have access to. The information provided includes the request name, net operating margin, request status, current request approval process step, and process status.

Request Name	Net Operating Margin	Request Sta...	Step					Process Status
			1	2	3	4	5	
2019 Test	\$53,335	Rejected	■	■	■	■	■	● Budget Request Review
Testing process management assignment	\$0	Approved	■	■	■	■	■	● Submit Budget Request
Process mgmt 2	\$2,900	Approved	■	■	■	■	■	● Submit Budget Request

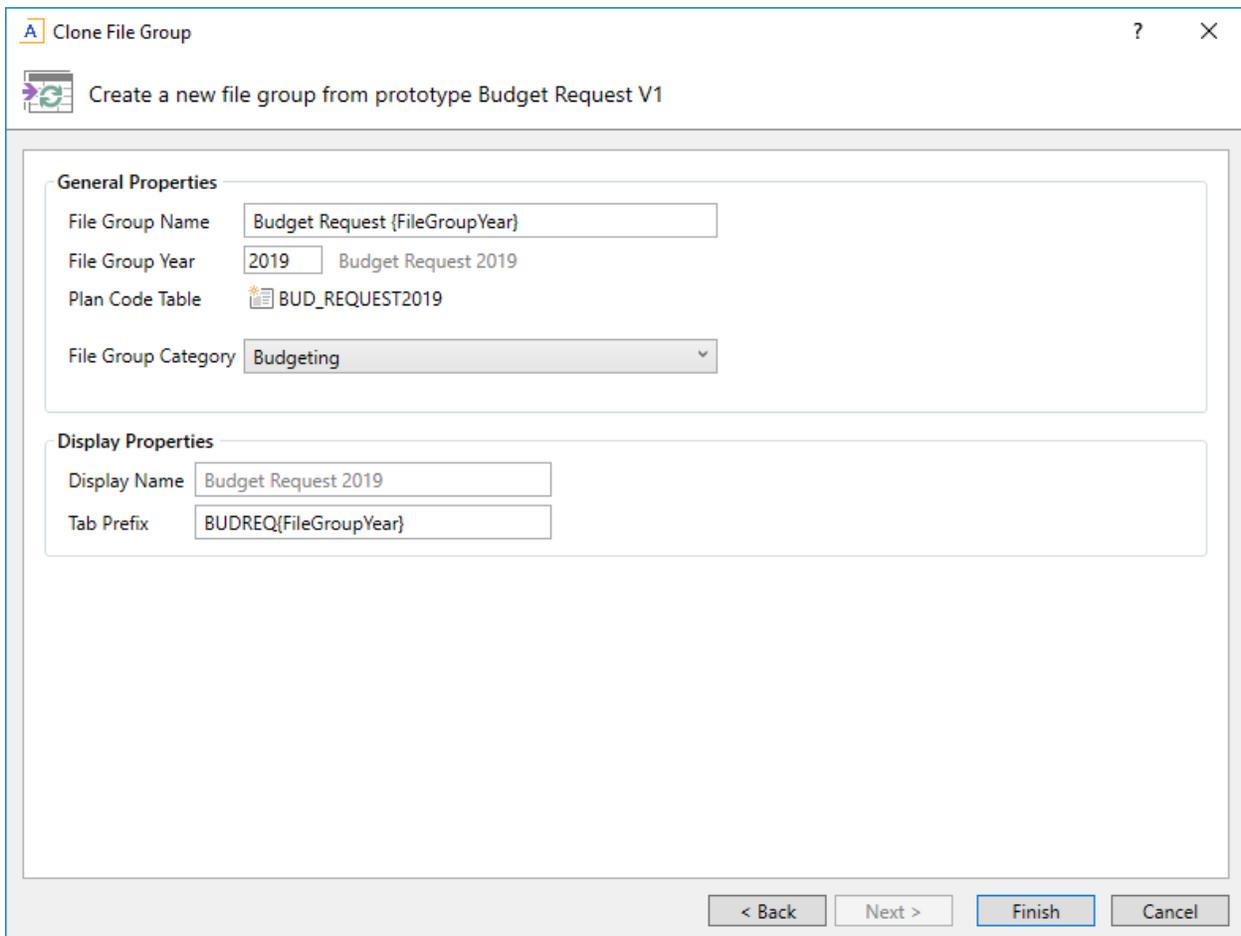
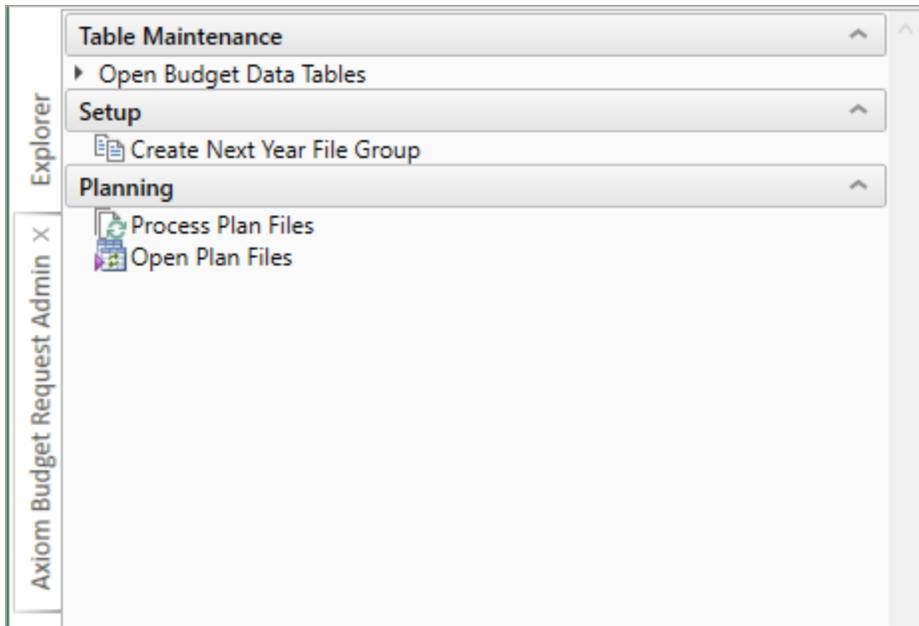
New Budget Request file groups

Clients with the new Budget Request license will notice the Budget Request V1 prototype file group. To create a year specific Budget Request file group from prototype, use the **Create Budget Request File Group From Prototype** command on the **Budget Implementation** task pane. There is also a **Budget Request Admin** task pane that includes the command **Create Next Year File Group**.

< Axiom Assistant

The screenshot displays the Axiom Assistant interface with a tree view of budgeting tasks. The interface is organized into three main sections: Explorer, Budget Implementation, and Notifications. The Explorer section contains 'Table Setup' and 'Create Tables'. The Budget Implementation section contains 'Configure Budget System'. The Notifications section contains 'Create Budgeting File Group', 'Create Labor File Group', and 'Create Budget Request File Group'. The 'Create Budget Request File Group' section is expanded, showing two sub-tasks: 'Create Budget Request File Group From Prototype' and 'Define Global Settings'. The 'Create Budget Request File Group From Prototype' task is highlighted with a red rectangular box.

- Table Setup
 - Update Dimensions to Preferred Names
- Create Tables
 - Create GL2014
 - Create GL2015
 - Create GL2016
 - Create GL2017
 - Create GL2018
 - Create GL2019
 - Create BUD2016
 - Create BUD2017
 - Create BUD2018
 - Create BUD2019
 - Refresh File System
- Configure Budget System
 - Budgeting Setup Utility
- Create Budgeting File Group
 - Create Budget File Group From Prototype
 - Define Global Settings
 - Create Plan Files
 - Process Plan Files
- Create Labor File Group
 - Create Labor File Group From Prototype
 - Define Global Settings
 - Create Plan Files
 - Process Plan Files
- Create Budget Request File Group
 - Create Budget Request File Group From Prototype
 - Define Global Settings



Budget request drivers

Axiom Budget Request uses drivers to allow you to establish request types, priorities, strategic objectives, funding sources, narratives, and voting metrics for your budget request.

To access budget request drivers:

1. In the Explorer, in the File Groups section, click **Budget Request [YYYY]**.
2. Click **Drivers**.
3. Right-click **Budget Request Drivers** and click **Open in Browser**.

Each tab is a separate driver and populated with default descriptions you can edit. The columns are similar for each driver. Although we provide default drivers, you can add new rows for the Priorities, Strategic Objectives, Funding Sources, and Narratives tabs if you need more. Click the blue text boxes in the Description column to edit any of the drivers.

REQUEST TYPES	PRIORITIES	STRATEGIC OBJECTIVES	FUNDING SOURCES	NARRATIVES	METRICS
Strategic Objective		Description	Active		
Strategic Objective 1	Reduce Costs		On	<input checked="" type="checkbox"/>	
Strategic Objective 2	Increase Revenue		On	<input checked="" type="checkbox"/>	
Strategic Objective 3	Student Satisfaction		On	<input checked="" type="checkbox"/>	

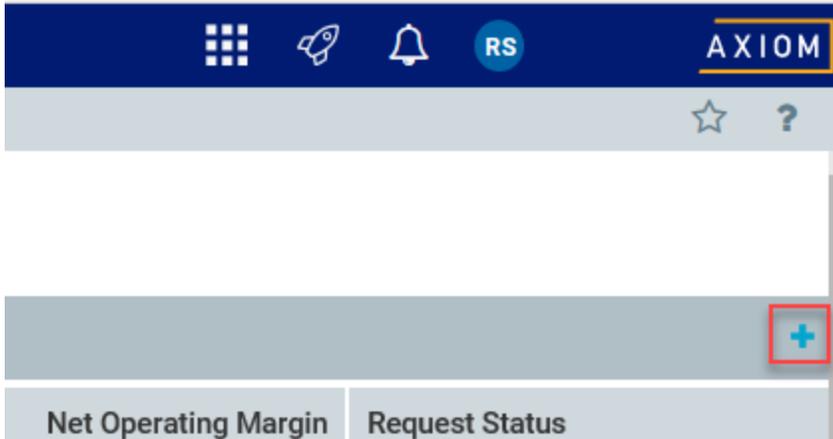
[+ Add Strategic Objective](#)

Creating budget requests

There are two ways to create a new budget request: from the Budget Requests tab in the web user interface or from the Open Plan Files dialog in the Excel Client.

To create a budget request in the web user interface:

1. On the Axiom Budgeting home page, in the **Budget Requests** tab, click the + icon on the right.



2. In the New Budget Request dialog that displays, type a title name, select the owning organization, select the category, and select a request type.

The image shows a 'New Budget Request' dialog box. The title bar says 'New Budget Request' with a close button. The main text reads 'Populate the fields below to create a new budget request for fiscal year 2019'. There are three main sections: 1. 'Request Name: (100 character max.)' with a text input field containing 'Enter Title'. 2. 'Select Owning Org:' with a dropdown menu containing 'Type to search'. A red arrow points to this dropdown with the text 'Budgeting plan files from PLANFILE tables'. 3. 'Request Type(s):' with three checkboxes: 'HR', 'IT', and 'Facilities'. A red arrow points to these checkboxes with the text 'Options based on drivers you created'. At the bottom center is a blue button labeled 'Create Request'.

NOTE: The Request Type(s) section selections indicate which departments will approve the request.

3. Click **Create Request**.

4. In the Setup page that displays, complete each tab. These tabs are defined in the following table:

Tab name	Description
General	Includes the ability to change request name, set sponsor, view approval status, enter a request description, and select request category options based on the drivers you created. This tab opens by default.
Schedules	Allows you to enter proposed budget numbers and run calculations based on global drivers.
Narratives	Allows you to answer questions set up in drivers to accompany and support your budget request.

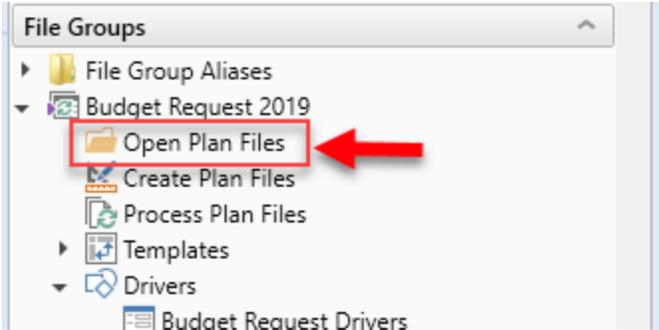
Example Request 1 | Budget Request 2019

GENERAL	SCHEDULES	NARRATIVES
Request Name: <input type="text" value="Example Request 1"/>		
Request ID: 4		
Created By: Roger Strother		
Created Date: 3/3/2019		
Sponsor (Contact): <input type="text" value="Enter Sponsor"/>		
Owning Org: A100		
Fund: fun_10000		
Approval Status: Pending		
Request Description: (150 character max.)		
<input style="width: 100%; height: 40px;" type="text" value="Enter Description"/>		
Request Type(s): (read-only)		
HR <input checked="" type="checkbox"/>		
IT <input checked="" type="checkbox"/>		
Facilities <input type="checkbox"/>		
Request Categories:		
Priority: <input type="text" value="Very Low"/>		
Strategic Objective: <input type="text" value="Reduce Costs"/>		
Funding Source: <input type="text" value="Debt"/>		

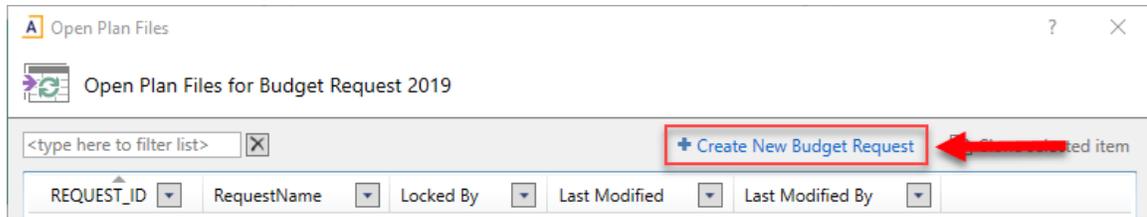
Options based on drivers you created

To create a budget request in the Excel Client:

1. In the Explorer, in the File Groups section, click Budget Request [YYYYY].
2. Double-click Open Plan Files.



3. In the Open Plan Files dialog that displays, click + Create New Budget Request.



4. Follow Steps 2-4, above.

IMPORTANT: The Request Type(s) available to you are established by your budget driver settings. You must set up budget request drivers before creating new budget requests using this form. For more information on the new budget requests drivers, see [Budget request drivers](#). In the example below, the request types for HR, IT, and Facilities are activated.

Budget Request 2019 Drivers				
REQUEST TYPES	PRIORITIES	STRATEGIC OBJECTIVES	FUNDING SOURCES	NARRATIVES
Request Type	Description			Active
Request Type 1	HR			On <input checked="" type="checkbox"/>
Request Type 2	IT			On <input checked="" type="checkbox"/>
Request Type 3	Facilities			On <input checked="" type="checkbox"/>
Request Type 4	Research			Off <input type="checkbox"/>
Request Type 5	Other			Off <input type="checkbox"/>

Process for budget requests

The budget request process allows the budget administrator to define the workflow process, manage, and approve budget requests. The budget request process is part of the Budget Request file group. The budget request approval process has five steps:

1. **Submit budget request** - Occurs when you complete the new form for creating budget requests, the request setup tabs, and click Submit. The system assigns the user who submits the budget request to be the owner of the request.
2. **Budget request review** - Occurs when the Step 2 owner approves the initial request for functional review. The owner of this step has the ability to either submit or reject the request.
3. **Functional review** - Occurs after the initial budget request is reviewed by the owner of Step 2. This step will involve multiple owners if you have multiple request types set up in the drivers. Each request type owner must independently approve the budget request during functional review.
4. **Voting** - Occurs after each owner in Step 3 approves the request. Voting is based on weighted

metrics set up in the Metrics tab of Budget Request Drivers. Use the Budget Scoring Report to assign a score to each weighted metric. For more information on Budget Request reports, see [Budget Request reports](#).

Budget Scoring Report
2019 Requests

Request ID	Request Name (click to open plan file)	Owning Org	Priority	Strategic Objective	Funding Source	2019 Budget	FY2020/23 Budget	Strategic Fit Weight - 25%	Operational Fit Weight - 5%	Feasibility Weight - 70%	Weighted Average
1	2019 Test	d01_d101100	Very Low	Reduce Costs	Unrestricted	\$53,335	\$204,518	10	7	7	7
2	Default/No Request	-	Very Low	Reduce Costs	Unrestricted	-\$4,679,339	-\$18,529,358	9	9	9	9

5. Final approval - Occurs when the Step 5 owner approves the final budget.

Process Status

Process status details for Plan File Process 'Budget Request Process'.

Process is Active Started on 3/29/2019 by Fatima Alfred

Process View | Plan File View

1 - Submit Budget Request (7 active plan files)

2 - Budget Request Review (No active plan files)

3 - Functional Review (No active plan files)

4 - Voting (No active plan files)

5 - Final Approval (No active plan files)

1 - Submit Budget Request (Edit Plan File Step) Status Active

Active Plan Files Show All <type here to search> 0 of 7 plan files selected Select All

REQUEST_ID	RequestName	Status	Current Owner	Due Date	Details
11	Test 3/6 defects	Active	Fatima Alfred (falfred)	No due date	Active less than 1 hour
12	Testing defects FA6	Active	Fatima Alfred (falfred)	No due date	Active less than 1 hour
13	Testing UI 3/11	Active	Fatima Alfred (falfred)	No due date	Active less than 1 hour
14	Testing UI 3/12	Active	Fatima Alfred (falfred)	No due date	Active less than 1 hour
15	Testing Max field	Active	Fatima Alfred (falfred)	No due date	Active less than 1 hour
16	Regression testing	Active	Support User (axsupport)	No due date	Active less than 1 hour
17	FA regression test 1	Active	Fatima Alfred (falfred)	No due date	Active less than 1 hour

Step Activity Select a plan file from the list above to see process activity in this step

OK

NOTE: The Step Owner is driven by the PLANFILE dimension table's BR_ProcessStep# columns. Use these columns to assign an owner to each step. You can enter multiple owners for Step 3 if you selected multiple Request Type drivers during driver setup. Use each BR_ProcessStep3Type# column to assign an owner to the corresponding request type.

Budget Request reports

Axiom Budget Request includes multiple reports.

The following section describes the reports:

▶ Budget Impact Report

This report includes a list of accounts, proposed budget, budget request, and total budget to give you insight into the overall budget impact from all budget requests.

Budget Impact Report
2019 Requests [Export to Excel](#)

Account	2019 Proposed Budget	2019 Budget Requests	Total Budget
Revenue			
Contributions	\$7,666	\$0	\$7,666
Gifts in Kind	\$20,600	\$0	\$20,600
Meal Plan Income	\$0	\$100,000	\$100,000
Misc Inc	\$0	\$0	\$0
Required Fees	\$0	\$14,300	\$14,300
Total Revenues	\$28,266	\$114,300	\$142,566
Personnel Expenses			
Benefits Other Than Pension	\$84,814	\$21,000	\$105,814
Employee Benefits	\$0	\$0	\$0

▶ Budget Request Overview

Use this report to view a list of all budget requests and their owning organization, status, priority, strategic objective, funding source, and totals.

Budget Request Overview
2019 Requests - Use the filter button to filter by owning org [Export to Excel](#)

ID	Request Name	Owning Org	Status	Priority	Strategic Objective	Funding Source	2019 Total	FY2020-23
1	2019 Test	01_101100	Rejected	Very Low	Reduce Costs	Unrestricted	\$53,335	\$0
3	Testing process management assignment	01_101200	Approved	Very Low	Reduce Costs	Unrestricted	\$0	\$0
4	Process mgmt 2	01_101250	Approved	Very Low	Reduce Costs	Unrestricted	\$2,900	\$0
5	Active process	01_101100	Rejected	Very High	Status Quo	Other	\$0	\$0
6	tEST	01_101100	Pending	Very Low	Reduce Costs	Unrestricted	\$0	\$0

▶ Budget Scoring Report

Use this report to score budget requests using weighted metrics. For more information on budget request voting, see [Process for budget requests](#).

Budget Scoring Report
2019 Requests

Request ID	Request Name (click to open plan file)	Owning Org	Priority	Strategic Objective	Funding Source	2019 Budget	FY2020-23 Budget	Strategic Fit Weight - 25%	Operational Fit Weight - 5%	Feasibility Weight - 70%	Weighted Average
1	2019 Test	d01_d101100	Very Low	Reduce Costs	Unrestricted	\$53,335	\$204,518	10	7	7	7
2	Default/No Request	-	Very Low	Reduce Costs	Unrestricted	-\$4,679,339	-\$18,529,358	9	9	9	9

▶ Budget Scoring Summary

Use this report to view and change the status of budget requests and view associated scores.

Budget Scoring Summary
2019 Requests - Set Budget Request Status

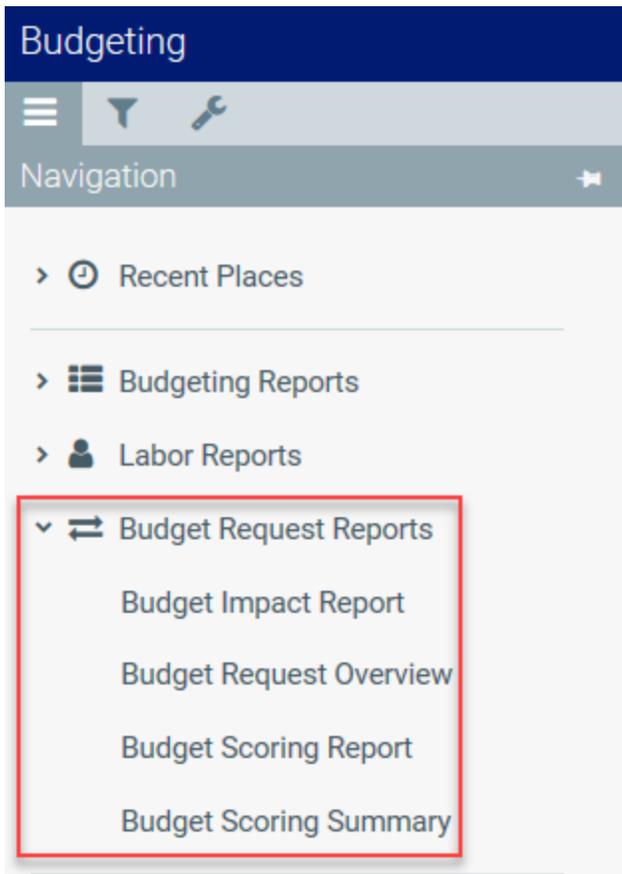
Request ID	Request Name (click to open plan file)	Status	Owning Org	Priority	Strategic Objective	Funding Source	Strategic Fit Weight - 25%	Operational Fit Weight - 15%	Feasibility Weight - 60%	Weighted Average	2022 Budget
2	JR Testing 2022	Pending	d01_d101100	Medium	Student Satisfaction	Unrestricted	10.0	8.0	7.0	7.9	(\$545,000)
3	Increase Advertising	Approved	d01_d101100	High	Increase Revenue	Unrestricted	5.0	7.0	10.0	8.3	\$650,000
4	New Project	Rejected	d01_d101100	Not Selected	Not Selected	Not Selected	0.0	0.0	0.0	0	\$0
5	Step 1	Rejected	d01_d101100	Not Selected	Not Selected	Not Selected	0.0	0.0	0.0	0	\$0
6	Test 2	Pending	d01_d101100	Medium	Staff Satisfaction	Unrestricted	0.0	0.0	0.0	0	\$0
7	More Travel	Pending	d01_d101100	Low	Student Satisfaction	Unrestricted	0.0	0.0	0.0	0	(\$5,000)

Budget Scoring Report
2019 Requests

Request ID	Request Name (click to open plan file)	Owning Org	Priority	Strategic Objective	Funding Source	2019 Budget	FY2020-23 Budget	Strategic Fit Weight - 25%	Operational Fit Weight - 5%	Feasibility Weight - 70%	Weighted Average
1	2019 Test	d01_d101100	Very Low	Reduce Costs	Unrestricted	\$53,335	\$204,518	10	7	7	7
2	Default/No Request	-	Very Low	Reduce Costs	Unrestricted	-\$4,679,339	-\$18,529,358	9	9	9	9

To access Axiom Budget Request reports:

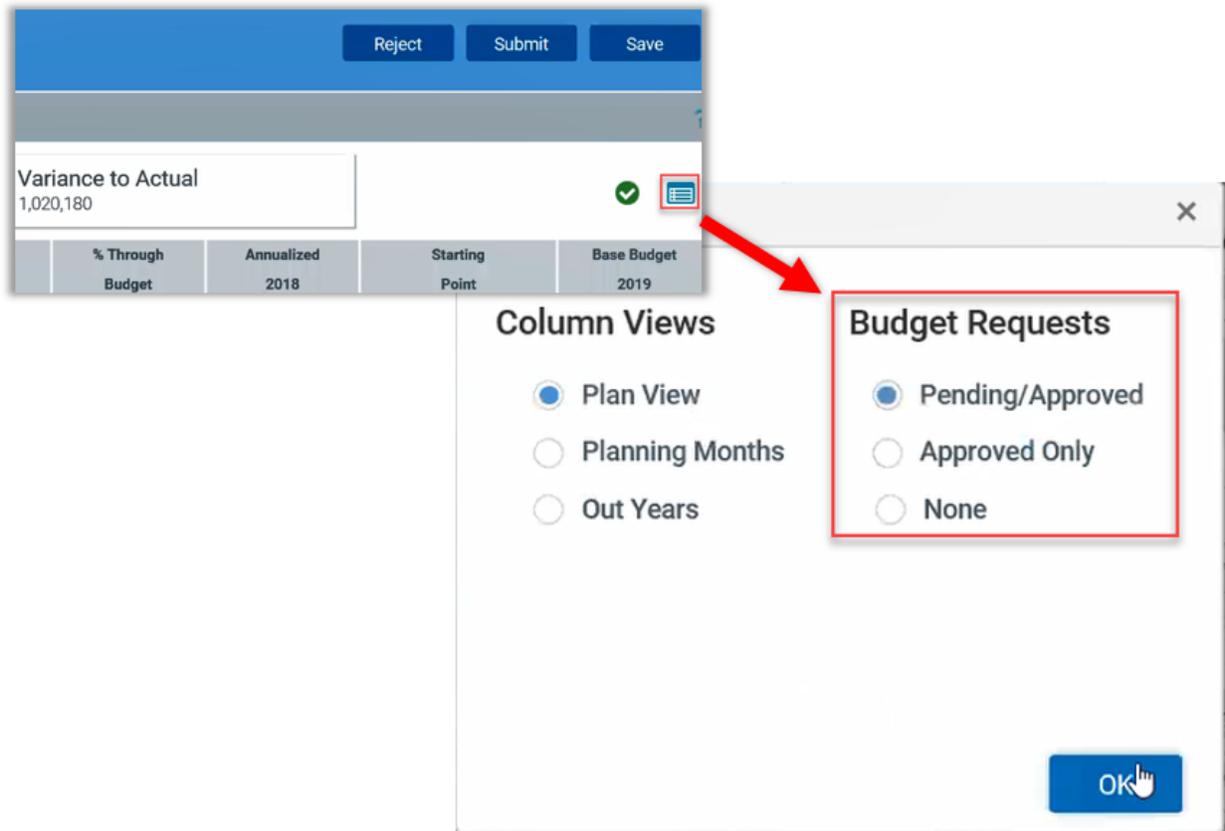
1. In the Axiom Budgeting web user interface, click the **Navigation** icon.
2. Click **Budget Request Reports**.



Budget request integration in plan files

Budget request dollars can be integrated into the budget plan file.

Click the **Views** icon to view pending and approved or approved only requests in your plan file as well as their impact on your proposed budget figures.



▲ Variance to Actual \$11,020,180			
Proposed Budget 2019	Spread Check	Budget Requests 2019	Total Budget 2019
0		2,000	2,000
0		2,000	2,000
33,583		10,500	44,083
776,270		0	776,270
116,635		35,000	151,635
926,488		45,500	971,988

Budget request dollars can also be integrated into the Excel budget plan files.

To view budget request figures in Excel:

1. In your plan file, in the Main ribbon tab, click the Change View drop-down.
2. Click the check boxes to select Pending Requests and/or Approved Requests.

The Pending Requests and/or Approved Requests columns will display in your budget plan file.

Font Paragraph Styles

Change View Add Row(s) Quick Filter Snapshot Formula Bar CM Library Help Close Axiom Software

Column Views Select All Deselect All Planning Columns Months Pending Requests Approved Requests Sheet Views Default Category Detail

ning User Home BGT2021 org00009

BUDGETING

udget: org00009

Acct	Description	June Budget	July Budget	Plan 2021	Pending Requests 2021	Approved Requests 2021	Total Budget 2021	Global Driver	Plan 2022	P
101000 fund3										
REV TEST										
TUITION AND FEES										
								3.0%		
5023	Summer Session Tuition Waiver Insert additional account	0	0	0	4,000	0	4,000	3.0%	0	
	Total Tuition And Fees	0	0	0	4,000	0	4,000		0	
	Total Rev Test	0	0	0	4,000	0	4,000		0	
	Net Revenues	0	0	0	4,000	0	4,000		0	
PERSONNELEXP TEST										
SALARIES & WAGES										
								2.0%		
6198	Salary Salvage Insert additional account	0	0	0	3,000	0	3,000	2.0%	0	
	Total Salaries & Wages	0	0	0	3,000	0	3,000		0	