Axiom Reports Training

University of Vermont

Agenda

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Explore on Your Own

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Why Axiom for Reporting?

Provides a suite of financial reports that:

- Are usable across multiple levels of the organization:
  - Reports are ready for senior management, but also usable by budget managers on
- Enable users to easily drill down or roll-up financial reports with one user interface
- Provide data across almost all Funds*
- Are consistent across the entire University
- Easily auditable back to PeopleSoft

* Excluding Fund 300 (Sponsored Projects)

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Reports

Enhancement to PeopleSoft reports

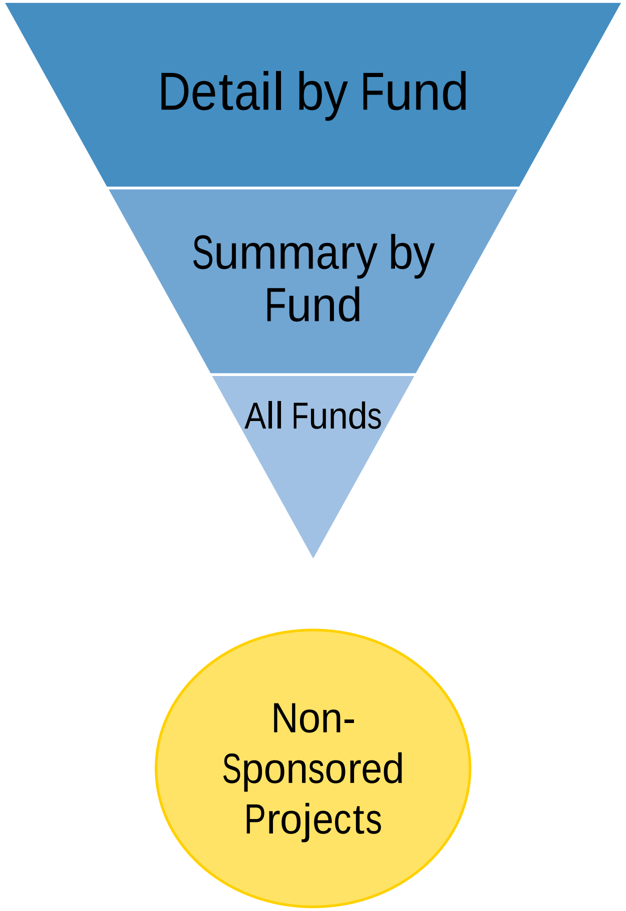
Replacement for Office of Operational Excellence's Excel reports for Gift & Endowments and General Fund

Quarterly Certifications

Hierarchy of Reports distinguished by level of detail provided

Non-Sponsored Projects reporting available in Axiom

Sponsored Projects reporting not available in Axiom



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Reports

listed in order of most detail

Detail by Fund: To see income statement/transaction

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Reports

continued

Non-Sponsored Projects

To see budgets and actuals for non-sponsored projects

total life of the project (all fiscal years)

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Report Characteristics

Report	Historical Data	Net Asset Balances	Chartstring Detail	Income Statement	

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Report Functionality

1. Refresh Variables
   - update report with the most current data
   - prompted to define values
   - selected values will be applied to report to impact the data refresh
2. Quick Filter
   - temporarily apply a filter to report
3. Drill
   - drill into a particular row so that you can see the detail on that row by chartstring, chartfield value, or transaction level detail
4. Change View
   - change the report row and column display between pre-
5. Print/Snapshot/Email
   - print, snapshot (copy to excel) for further manipulation, or email

defined layouts

Demos
&
Group Practice

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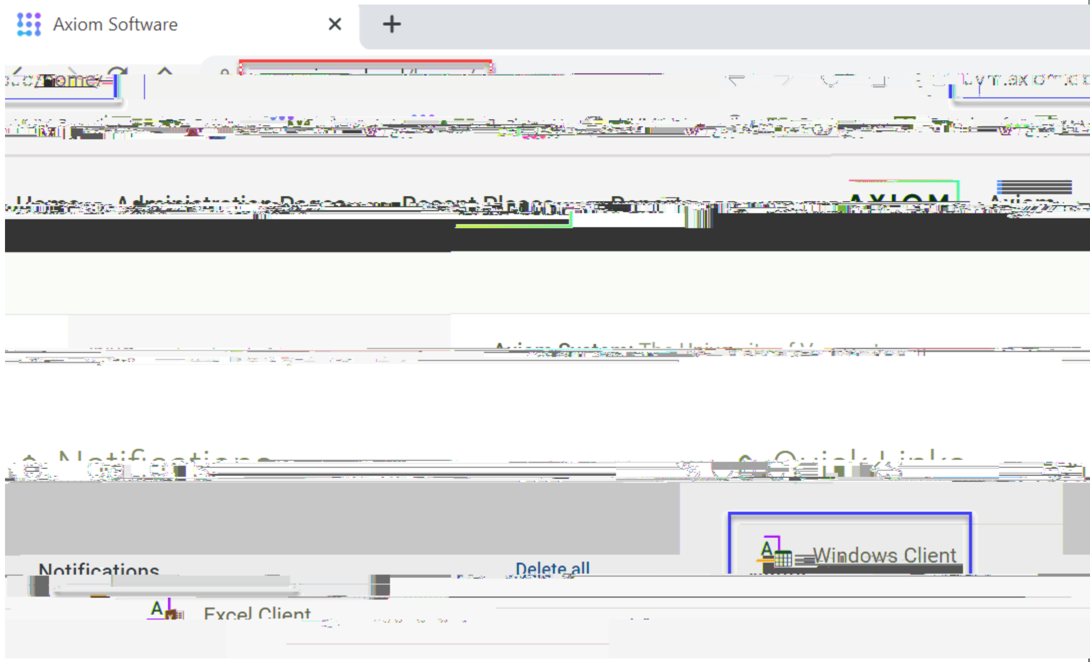
Login

1. Go to https://uvm.axiom.cloud/

2.



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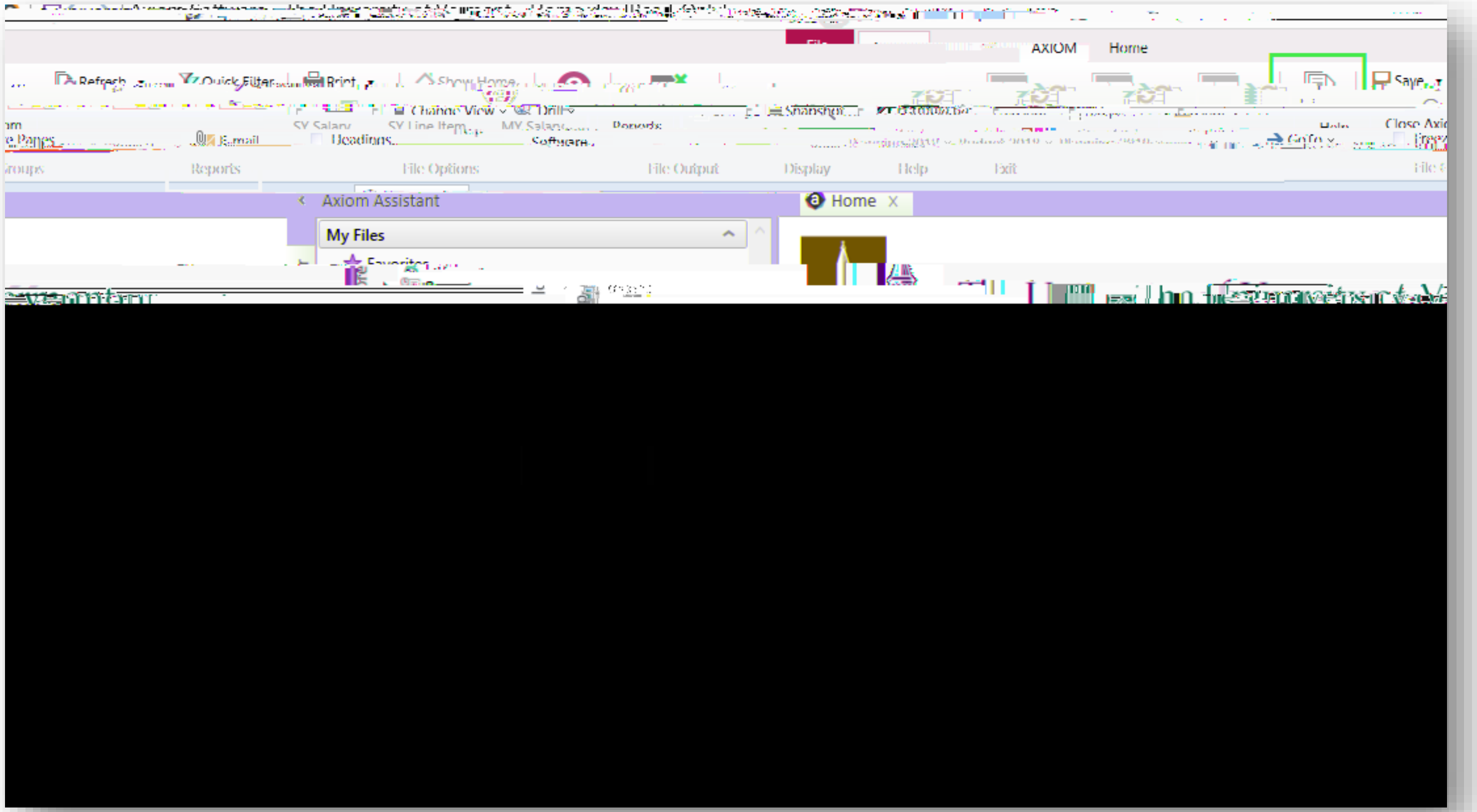
Login ς continued

View after selecting Windows Client



Group Practice #1: Detail By Fund

1. Refresh Variables

   Select current period and fiscal year
   Select your reporting unit
   Select fund 100

2. Look through the column heads

3. Look through the rows

4. Drill – Double click on

   salary row; select Pay Drill
   expense row; select PO Drill
   expense row; select GL Drill

5. Change view – select each

6. Quick Filter – apply for department

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Group Practice #2: Summary by Fund

1. Refresh Variables

Explore on Your Own