**Preparing to Login to Montana State U Budget**

1) If using Mozilla Firefox or Google Chrome, you must first download an add-on. Use the following links:
   a. ClickOnce Helper for Google Chrome and click on the ClickOnce for Google Chrome
   b. ClickOnce Helper for Firefox and click on the FxClickOnce
2) If using Internet Explorer, no additional download is necessary

Logging in to Montana State U Budget

1) Navigate to https://montanasu.axiom.cloud
2) Login using your NetID and Password
3) Click on the Windows Client
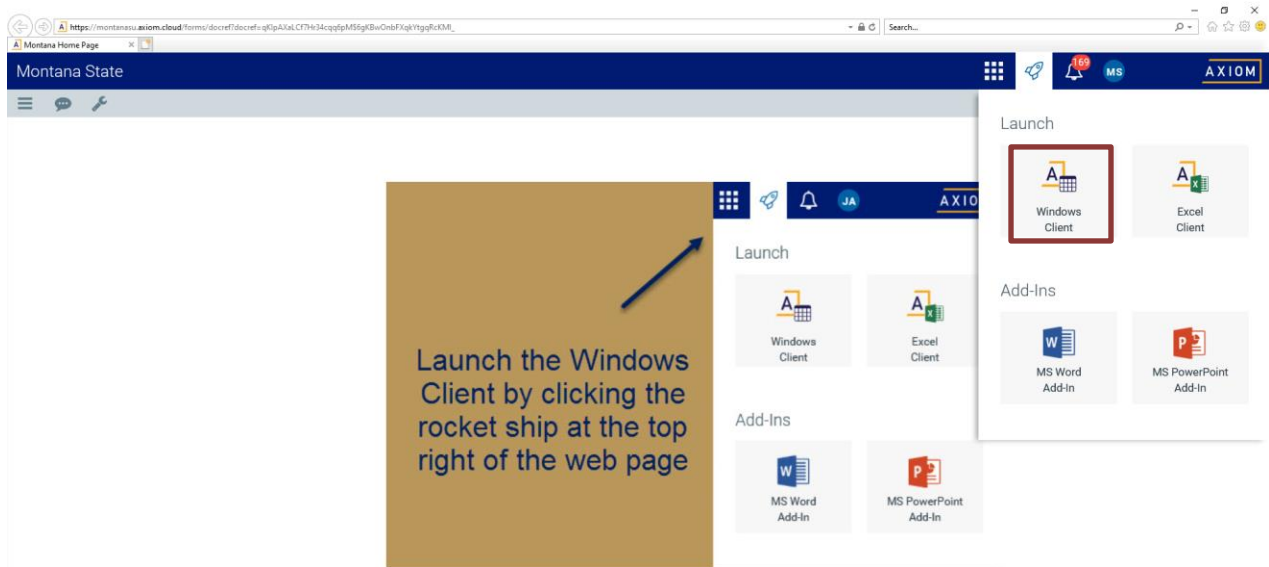
4) If using Mozilla Firefox or Google Chrome, you will get the following popup. Click on the 'ClickOnce Install' which will launch the application and take you to the home page
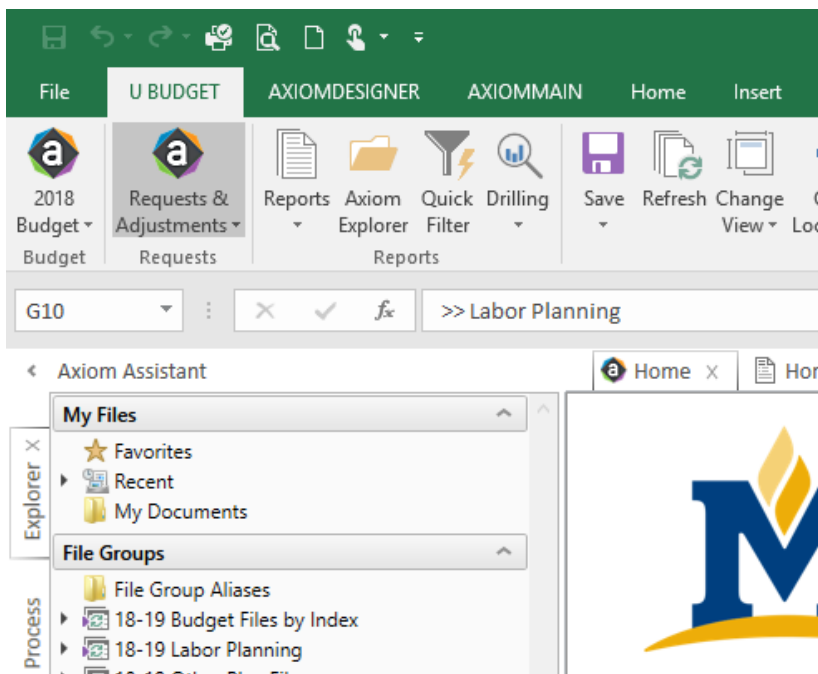
5) The system looks a lot like Microsoft Excel or Microsoft Word. You have two options for navigation, one at the top and one on the left. To see more of your screen, you can hide the menu on the left by clicking the arrow by the words 'Axiom Assistant'
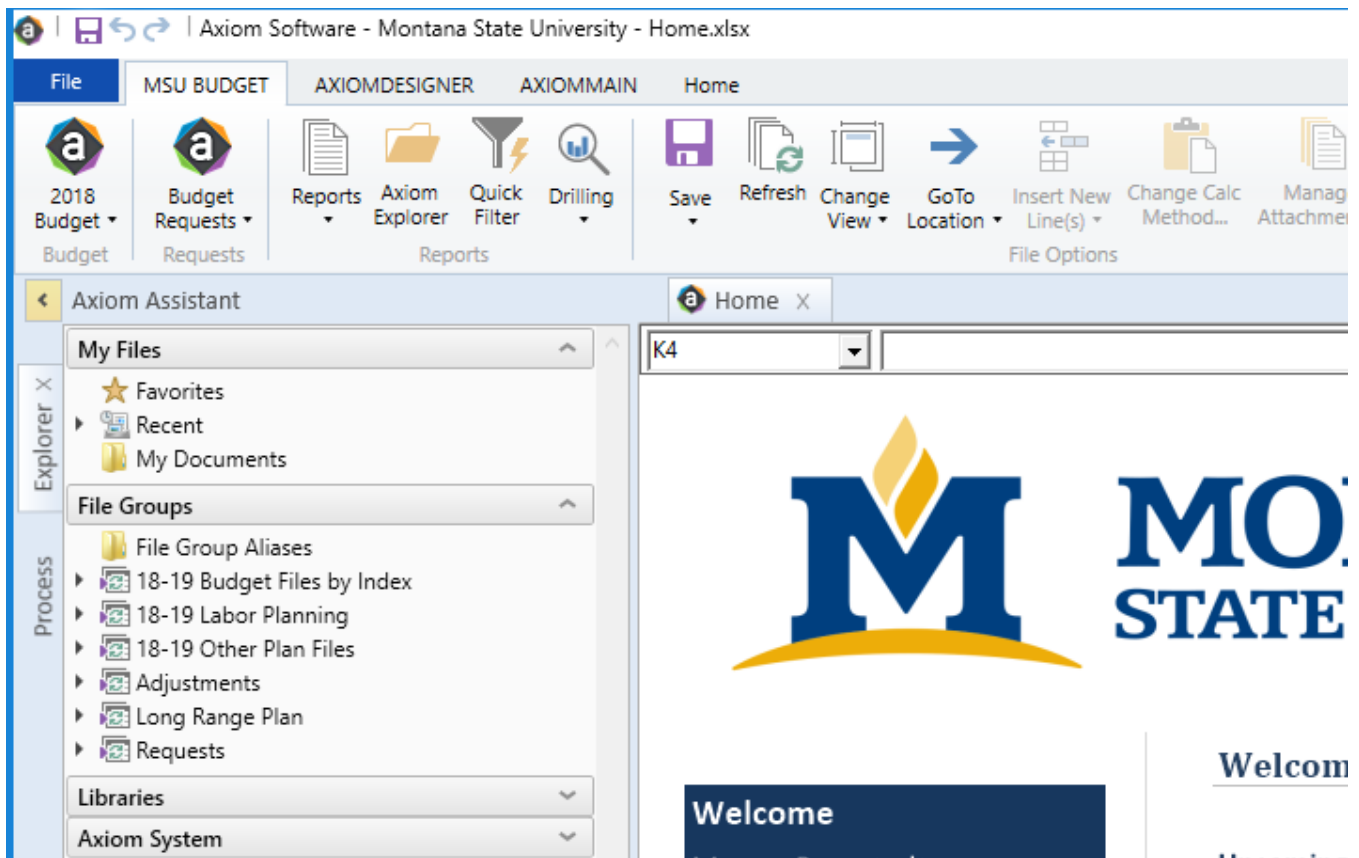
2% Reallocation Files – Everything in on Request File

1) Click on the drop-down menu under "Requests & Adjustments"

2) Select 'Open Existing Request'
3) A list of requests that have your user ID will pop up. At this point, except for shared services, you will only see one file that is for entering the 2% reallocation. Everything should be entered in this one file.

Open Plan Files

Open Plan Files for Requests

`<type here to filter list>` ☒

REQUEST_ID ▼	REQ_TYPE ▼	DESCRIPTION ▼	CREATEDBYUSER ▼	DATECREATED ▼	YEAR ▼
504	Budget Request	College of Agriculture 2% Reallocation	j99b266	12/15/2017 8:29:27 PM	FY18
505	Budget Request	College of Arts & Architecture 2% Reallocation	k31c515	12/15/2017 8:37:58 PM	FY18
506	Budget Request	College of Engineering 2% Reallocation	f37x729	12/15/2017 8:40:26 PM	FY18
507	Budget Request	College of Nursing 2% Reallocation	b53n979	12/15/2017 8:42:55 PM	FY18
508	Budget Request	Education, Health & Human Development 2% Reallocat	k61z171	12/15/2017 8:44:20 PM	FY18
509	Budget Request	Graduate School 2% Reallocation	t45k927	12/15/2017 8:46:15 PM	FY18
510	Budget Request	Honors College 2% Reallocation	x17z622	12/15/2017 8:47:50 PM	FY18
511	Budget Request	Jake Jabs College of Business & Entrepreneurship 2	s47r218	12/15/2017 8:50:30 PM	FY18
512	Budget Request	Library 2% Reallocation	c31x758	12/15/2017 8:51:36 PM	FY18
513	Budget Request	International Programs 2% Reallocation	c31x758	12/15/2017 8:56:37 PM	FY18
514	Budget Request	Extended University 2% Reallocation	c31x758	12/15/2017 9:00:08 PM	FY18
515	Budget Request	Gallatin College 2% Reallocation	s76z663	12/15/2017 9:07:46 PM	FY18
516	Budget Request	Other Provost 2% Reallocation	t95w737	12/18/2017 4:12:24 PM	FY18
517	Budget Request	WWAMI 2% Reallocation	c31x758	12/18/2017 4:14:56 PM	FY18
518	Budget Request	University Studies 2% Reallocation	a29n722	12/18/2017 4:18:17 PM	FY18

4) Select the request that has the name of your unit followed by the words "2% Reallocation"
   a. It will open and you will see two tabs at the bottom, click on the Financials tab
   b. Here you will find a place to enter approvers, target numbers, and section for details

JJCBE 2% Reallocation
Budget Request #511
(Index not assigned on Info sheet yet)

View:
Totals

GoTo: Info Sheet

	Requested Amount

[Skip]	<< 1st Approver	
[Skip]	<< 2nd Approver	

BASE TOTAL		$ -
ONE-TIME-ONLY TOTAL		$ -
TOTAL REQUEST		$ -
Total 2% Reallocation Target		$ 98,305
Remaining to Meet Target		$ 98,305
OTO % of Reallocation		$ 19,661
Balance from OTO		$ 19,661

Index	Account	Comments	FTE	Type	FY	Req. Amt

>> ADD NEW ACCOUNT/INDEX COMBO (dbl click)

5) Enter approver names
   a. If you have a Dean/Director that needs to see this request before it is submitted, please select their fiscal manager as the 1st approver. Otherwise, do not select.
   b. Please leave 2nd approver blank.

JJCBE 2% Reallocation
Budget Request #511
(Index not assigned on Info sheet yet)

View:
Totals

GoTo: Info Sheet

Requested
Amount

| | [Skip] | << 1st Approver | |
| | [Skip] | << 2nd Approver | |

BASE TOTAL			$ -
ONE-TIME-ONLY TOTAL			$ -
TOTAL REQUEST			$ -

6) To begin entering your index/account information, double click on the "Add new acct/index combo"

P	Q	R	S	T	U	V	W	X	AB	BY

JJCBE 2% Reallocation
Budget Request #511
(Index not assigned on Info sheet yet)

View:
Totals

GoTo: Info Sheet

Requested
Amount

| | [Skip] | << 1st Approver | |
| | [Skip] | << 2nd Approver | |

BASE TOTAL	$ -
ONE-TIME-ONLY TOTAL	$ -
TOTAL REQUEST	$ -

Total 2% Reallocation Target	$ 98,305
Remaining to Meet Target	$ 98,305
OTO % of Reallocation	$ 19,661
Balance from OTO	$ 19,661

Index	Account	Comments	FTE	Type	FY	Req. Amt

>> ADD NEW ACCOUNT/INDEX COMBO (dbl click)

7) In the variable box, select and index/account code

Calc Method Variables ✕

Choose an INDEX

Choose a value for INDEX. | Choose Value... |

Choose an ACCT

Choose a value for ACCT. | Choose Value... |

☀ Enter a value for 'Choose an INDEX'

| OK | Cancel |

8) Select Base or OTO in the drop down, depending on which you are reducing in the related index/account code

9) Enter the dollar amount in the blue box under "Req. Amt". Please enter as negative numbers.
10) Continue following the steps above to add index/account combinations
11) When you are ready, click "Save" and Process Management will prompt you to move to next step
    a. If you are still going to work on this file, select 'Leave in current step'

b. If you are finished with the file and ready to submit for approval, select 'Advance to next step'. If you would like to include a comment, you can type it in the comment box.

12) Close the file when completed.

Strategic Investment Requests – Could Have Multiple Files (1 for each initiative)

1) Once logged into MSU Budget, click on the MSU Budget tab in the top ribbon
2) Click the drop down arrow and select 'Reallocation & Investment Request'
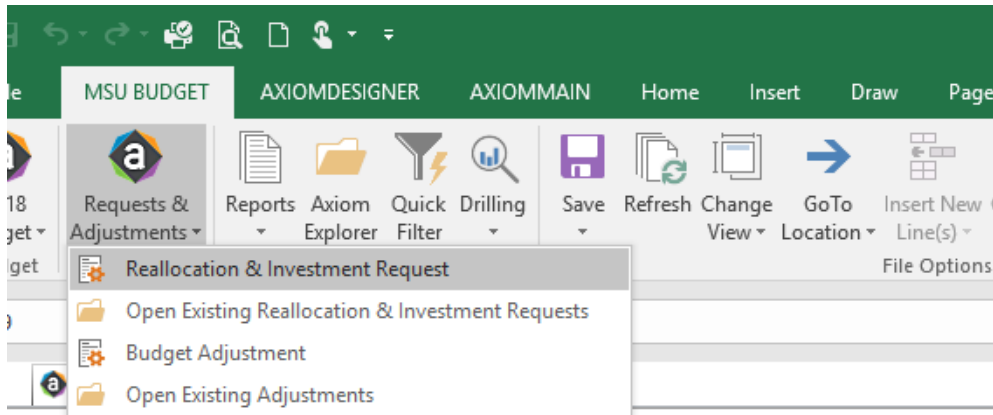
3) Enter the Title of the Request which should be associated with the strategic initiative
    a. For Academic Units, please include all anticipated sections requests in one file
4) Click Create

5) This will take you to the "Info" tab which will need to be completed for each request. It includes a space to enter the following:
    a. Narrative – describe the initiative and its impact
    b. Primary Index – select an index by double-clicking on the 3 blue dots to bring up a list of indexes

    c. Strategic Plan Metrics – Select at least one and up to 3 prioritized metrics
    d. Assessment Plan – Describe how you will know if this initiative is successful or not
6) When completed, go to the "Financial Details" tab
7) Use the same logic as above for selecting a 1st approver and a 2nd approver

8) For each individual request, a priority number must be assigned. If a single unit has 5 requests, they should be prioritized 1 through 5 using the box to the right of the request number

9) You will enter index/account combinations as above by double-clicking on the Add index/acct combo

10) Include a comment that describes that particular line, select base or OTO, add request amount as a positive
    a. Please be sure to include FTE for positions associated with personnel
11) When finished click "Save"
12) Continue creating and prioritizing requests as needed for individual initiatives

Report for Summary

1) To view a report with all of the information, navigate to the Reports Library.
2) Under the Budget Reports file there is a report called "Reallocation & Request Summary"
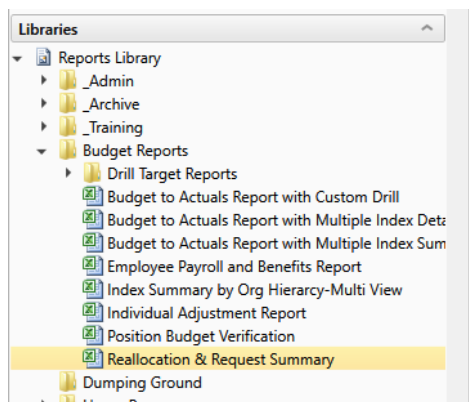
Sharing with non-MSU Budget users

1) Open the file, if not already open.
2) On the MSU Budget ribbon tab, select "Email" in the distribution section.
3) Update the Include section to "Entire Workbook".
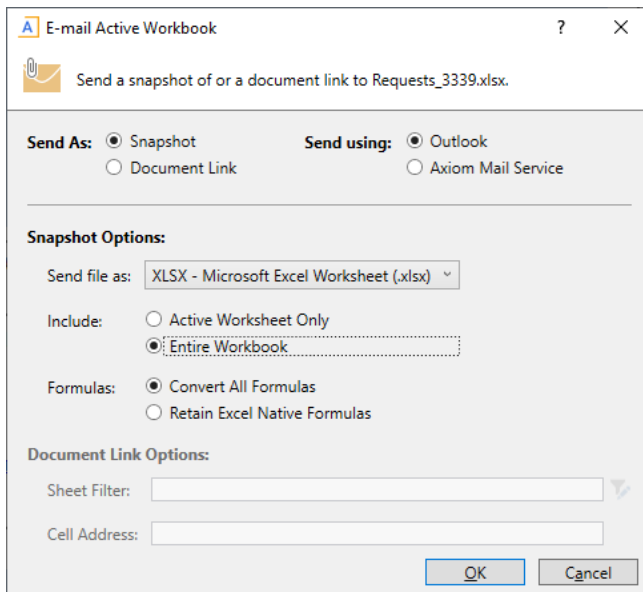
4) Select "OK".
5) New email will open with file attached. Input other relevant information like standard email. Subject line can be updated to more meaningful title.