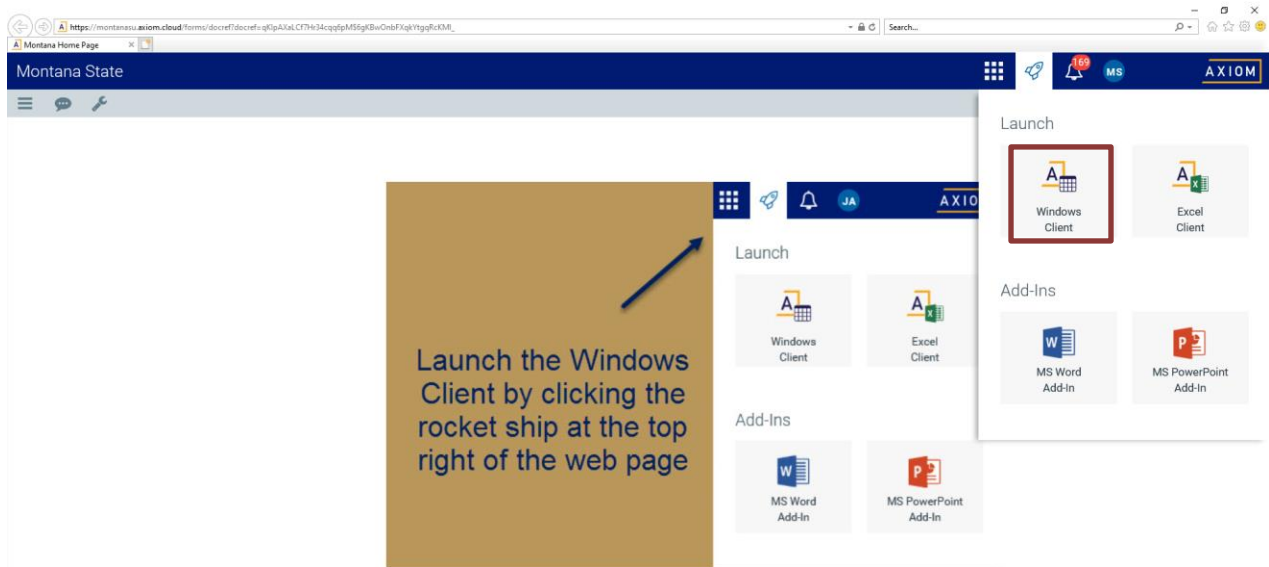


Preparing to Login to Montana State U Budget

- 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

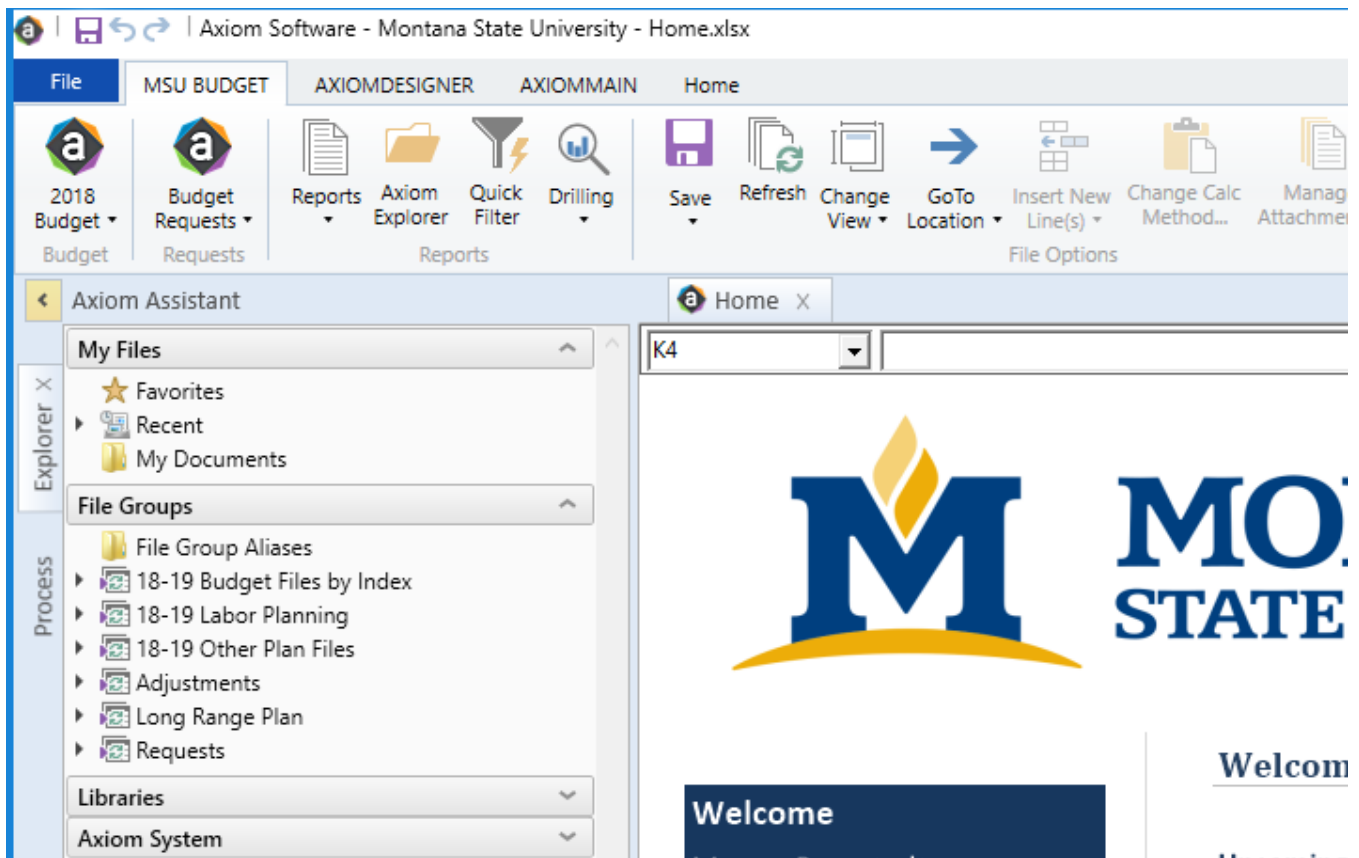
- 1) Navigate to <https://montanasu.axiom.cloud>
- 2) Login using your NetID and Password
- 3) Click on the Windows Client



- 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

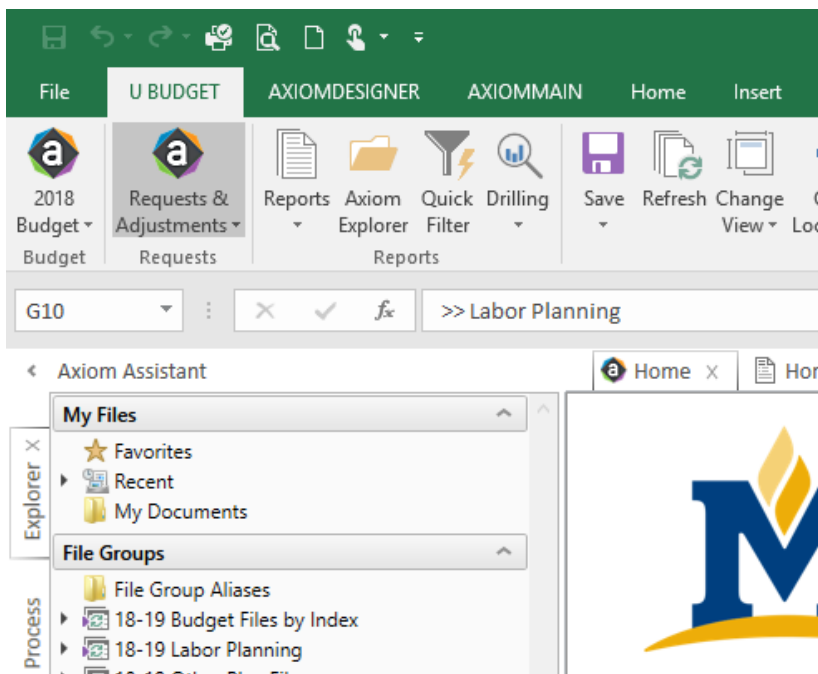


- 5) The system looks a lot like Microsoft Excel or Microsoft Word. You have two options for navigation, one at the top and one on the left. To see more of your screen, you can hide the menu on the left by clicking the arrow by the words 'Axiom Assistant'



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> X

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	s20n722	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: [GoTo: Info Sheet](#)

Totals **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					View:		GoTo: Info Sheet			
Budget Request #511					Totals		Requested			
(Index not assigned on Info sheet yet)							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 an ACCT

Choose a value for ACCT.

☀ Enter a value for 'Choose an INDEX'

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

	Index	Account	Comments	FTE	Type	FY	Req. Amt
86							
87							
88	Keep ... 419105 - Instr Sabt'L Leave	61123N	Non Tenure Track Faculty	Add FTE	stal for 61123N >>		\$ (5,913)
89	Keep 419105 - Instr Sabt'L Leave	61123N	Reduce Sabbatical Budget	0.0	Base	Y19	\$ (5,913)
92	>> ADD NEW ACCOUNT/INDEX COMBO (dbl click)						
93	>> ADD LINES TO 61123N (dbl click)						
94					<div style="border: 1px solid black; padding: 2px;"> OTO Base </div>		

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'

Process Action ✕

Perform process action for 'Approval of new requests'

Current Step

Initiate Complete Submit

Megan Lasso

Next Step

1st Level Approval

Melissa Kinnear

Leave in current step

Advance to next step

No action will be taken for REQUEST_ID 516.

Comment: Any comment will be stored with the process and included in notifications to the next step owner.

- 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.

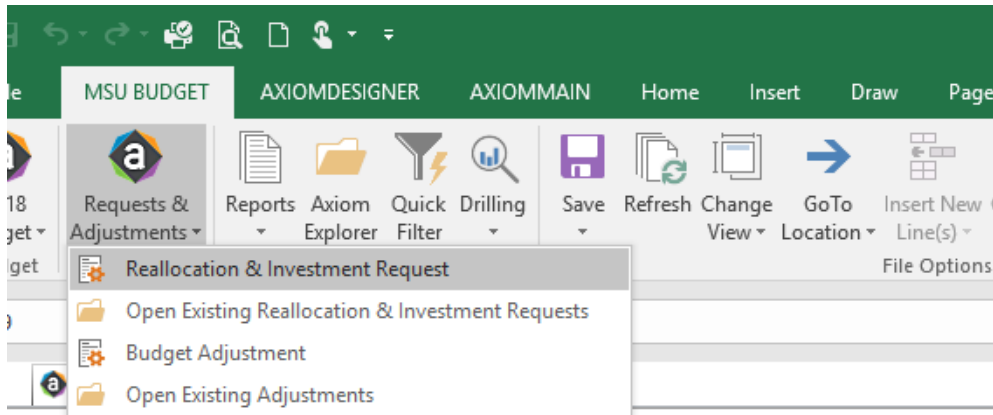
The image shows a 'Process Action' dialog box with the following elements:

- Title Bar:** 'Process Action' with a close button (X).
- Header:** 'Perform process action for 'Approval of new requests'' with a process flow icon.
- Current Step:** A box containing 'Initiate Complete Submit' (with a calendar icon) and 'Megan Lasso' (with a person icon).
- Next Step:** A box containing '1st Level Approval' (with a calendar icon) and 'Melissa Kinnear' (with a person icon).
- Flow:** A green arrow points from the Current Step to the Next Step.
- Options:** Two radio buttons are present: 'Leave in current step' (unselected) and 'Advance to next step' (selected).
- Status:** 'Step will be completed for REQUEST_ID 516.'
- Comment:** A section with the text 'Comment: Any comment will be stored with the process and included in notifications to the next step owner.' and a text input field containing 'This request includes everything for the Budget Office'.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

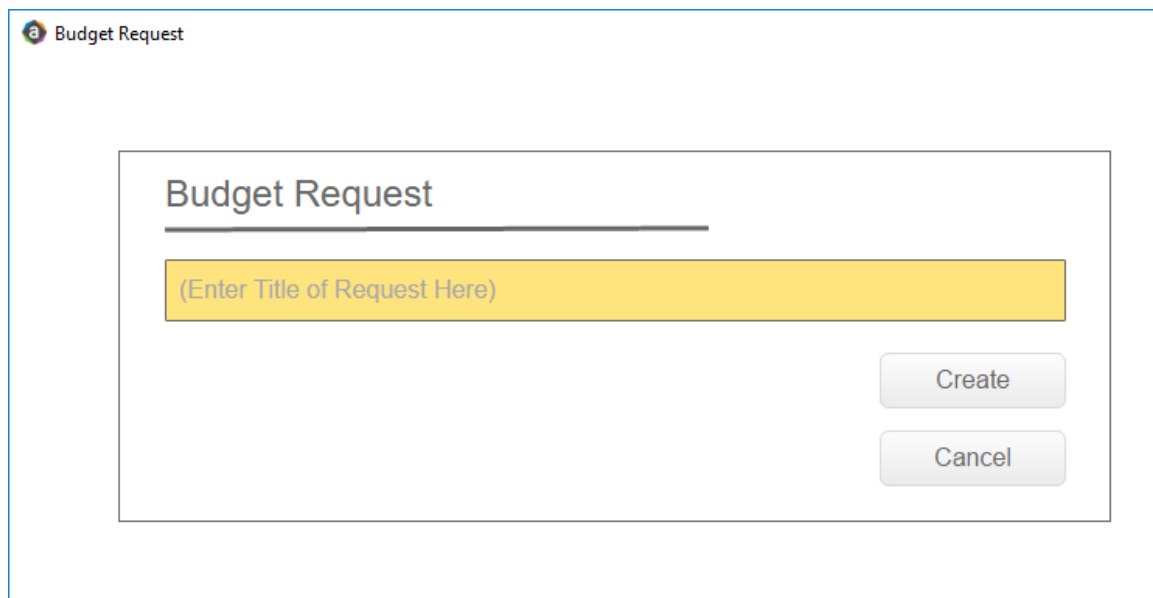
12) Close the file when completed.


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

A screenshot of the 'Budget Request' dialog box. The title bar reads 'Budget Request'. Inside the dialog, there is a text input field with a yellow background and the placeholder text '(Enter Title of Request Here)'. Below the input field are two buttons: 'Create' and 'Cancel'.

- 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
A screenshot of a dropdown menu for selecting a Primary Index. The dropdown is currently set to 'Unassigned'. Below the dropdown, there is a red text prompt: 'Please Choose a Primary Index Above'.
 - 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

Home [REQ] 540 x

Provost Accreditation Program Evaluation View: [GoTo: Info Sheet](#)

Budget Request #540 2 << Priority of Request Totals

Requested
Amount

419001 - Vp-Academic Affairs

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

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

Home [REQ] 540 x

Provost Accreditation Program Evaluation View: [GoTo: Info Sheet](#)

Budget Request #540 2 << Priority of Request Totals

Requested
Amount

419001 - Vp-Academic Affairs

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

BASE TOTAL		\$	50,000
ONE-TIME-ONLY TOTAL		\$	-
TOTAL REQUEST		\$	50,000

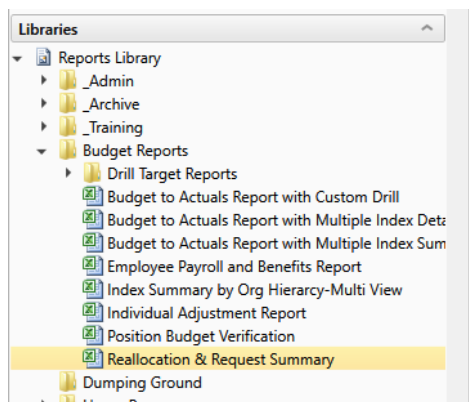
	Index	Account	Comments	FTE	Type	FY	Req. Amt
Keep	...	419403 - Academic Aff Support	...	61124	Contract Professional	<i>Total for 61124 >></i>	\$ 50,000
Keep		419403 - Academic Aff Support		61124	Program Assessment Coordinator	1.0 Base FY19	\$ 50,000

>> ADD NEW ACCOUNT/INDEX COMBO (dbl click)
>> ADD LINES TO 61124 (dbl click)

- 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

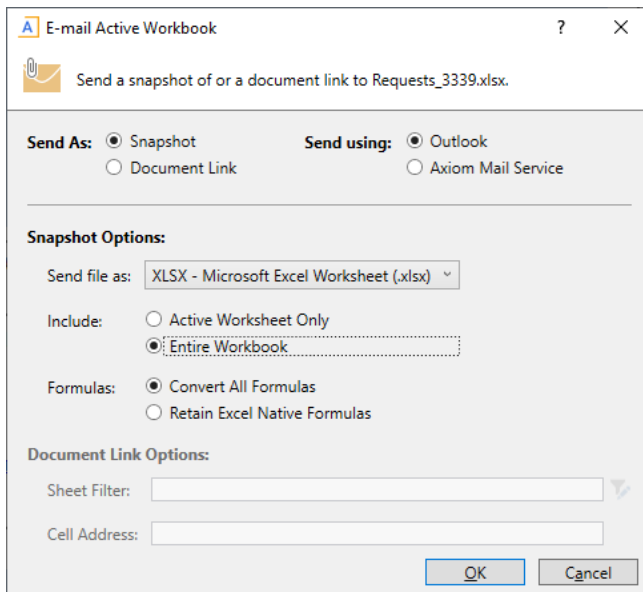
Report for Summary

- 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.