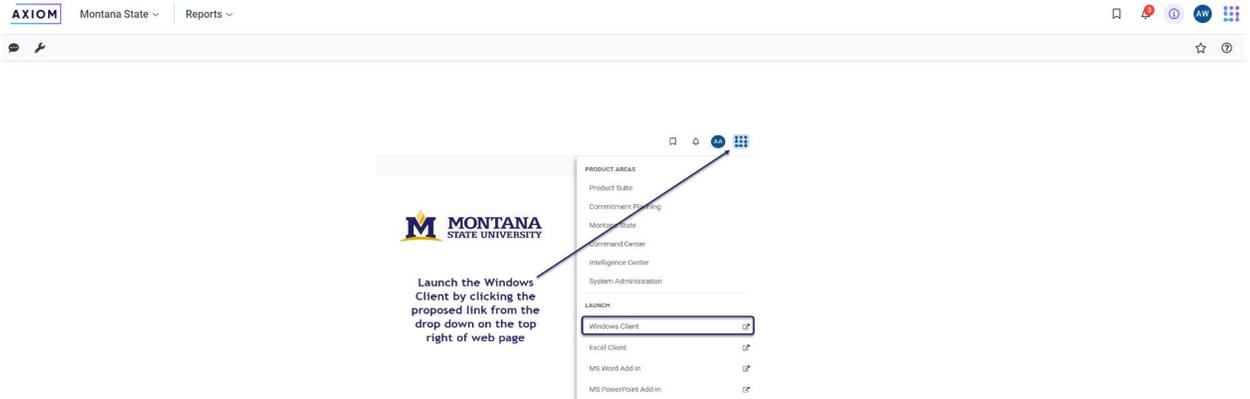


Commitment Planning

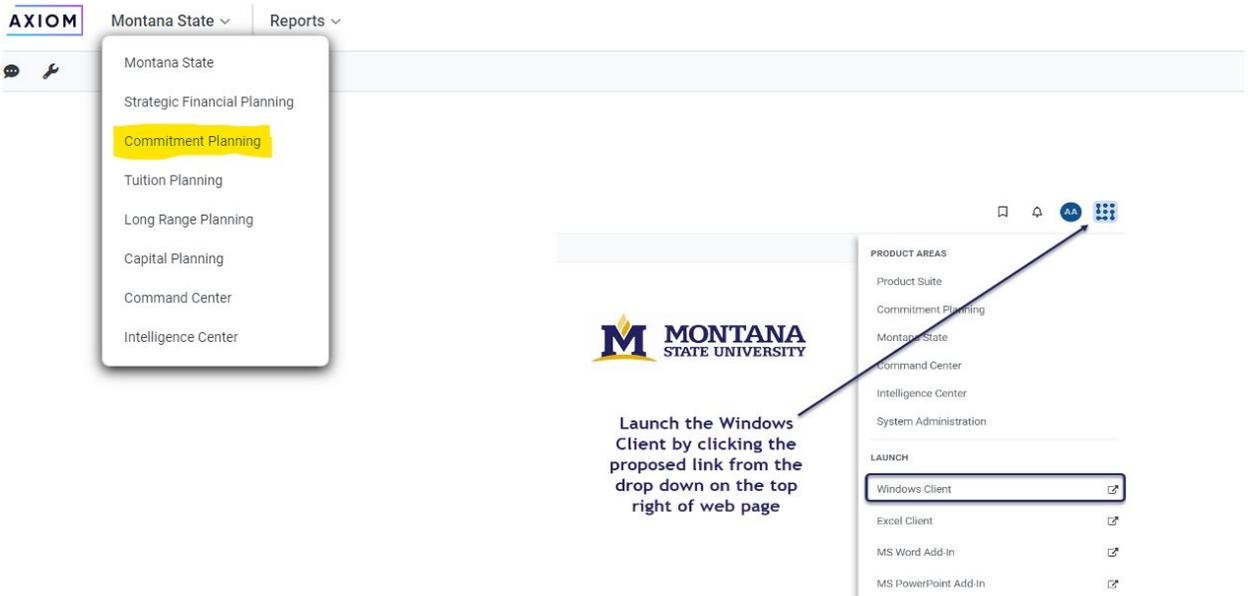
Updated 9/18/2024

Accessing Commitment Planning Suite

1. Log in to MSU Budget (Axiom) as normal to reach this homepage



2. Click on the drop down that says "Montana State" and select "Commitment Planning"



3. This will open the Home of Commitment Planning where you will see all your commitments. When you login for the first time before you have created any commitments there will not be any for you to see until you create one.

4. The header row can be used for sorting purposes.

Commitment Planning

[+ Create New Commitment](#) [Export to Excel](#)

ID	COMMITMENT	Type(s)	Status ↑	Org ↑	Creator	Funding	Priority	Strategic Goal	Total COMMIT
----	------------	---------	----------	-------	---------	---------	----------	----------------	--------------

Creating a Commitment

5. To create a commitment, select “+ Create New Commitment”

The screenshot shows the top navigation bar with icons for bookmark, notifications (3), information, AW, and a grid. Below the navigation bar is a search bar with a star and question mark icon. The main content area features a yellow highlight on the "+ Create New Commitment" button, followed by an "Export to Excel" button. Below these buttons is a table header with columns: Priority, Strategic Goal, and Total COMMIT.

6. Fill in the following required information in the New Commitment box
- Name: How you want to denote this commitment
 - Requesting Org: the org that you are creating this for (most likely your main one)
 - Commitment Type: can select multiple
 - Personnel
 - Capital
 - Other – must select Type
 - Other Operating
 - Year End

iv. Technology

New Commitment

Populate the fields below to create a new commitment for fiscal year 2024

Name: (100 character max.) Test 9.17.2024

Requesting Org: Graduate School

Commitment Type:

- Personnel
- Capital
- Other
- Technology

Select Type

- Other Operating
- Year End

Create Commitment

7. Select “Create Commitment” button and then select “OK”. The Overview tab will display.
Test 9.17.2024

OVERVIEW PERSONNEL CAPITAL OTHER TECHNOLOGY SUMMARY

Commitment Information

Name: Test 9.17.2024

Commitment ID: 81

Status: In Progress

Start Date: [Calendar Icon]

Created By: Ann Wells

Created Date: 9/17/2024

Requester: Enter Requester

Requesting Org: 421430

Commitment Type(s):

- Personnel
- Capital
- Other Operating
- Technology

Commitment Categories:

Funding: Not Selected

Strategic Goal: Not Selected

Priority: Not Selected

Description: Enter Description

Discussion: Add a comment

- Name: Editable.** The title you entered before creating the commitment will display upon opening.
- Status: Editable. In Progress, Approved, Cancelled, Revised, Approved (Revised).** This is a signal, similar to the steps for adjustments, of where the commitment is in the process.
- Start Date: Editable.** This field does not dictate the alignment of fiscal year but can be informative if there is a mid-year start date. Specifically, this can assist in

alignment with grants that do not follow a traditional fiscal year. Not a mandatory field.

- d. **End Date: Editable.** Same concept as Start Date. Not a mandatory field.
 - e. **Created By:** Will automatically populate based on the user entering the commitment.
 - f. **Created Date:** Will automatically populate based on the date created.
 - g. **Requestor: Editable.** This field is intended for the Exec/Dean/Director that is the decision maker for the funding.
 - h. **Requesting Org:** What you input in the create box.
 - i. **Commitment Types: Editable.** If you need to add/remove a type to the commitment, simply select the check box and it will update the tabs at the top of the display.
 - j. **Commitment Categories: Editable.**
 - i. **Funding:** Used to help determine what type of commitment funding this is. Not a mandatory field but encouraged.
 - 1. Institutional – something coming from the institution outside of investment processes
 - 2. Internal – commitment within your greater unit
 - 3. Cross-Unit – between separate units
 - 4. Investment – only used within process
 - ii. **Strategic Goal:** Goals will align with Planning Councils priorities. Not a mandatory field but encouraged.
 - iii. **Priority:** This can assist units with alignment of limited resources. Not a mandatory field.
 - k. **Description: Editable.** This section allows you to include a narrative description of the commitment.
 - l. **Discussion: Editable.** If this commitment needs to be approved at multiple levels, this section allows multiple users to provide feedback to one another attached to the original commitment. For example, if the original request included 2 GTA positions, but the final version was updated to 1, this would be a great place to provide feedback on why that update occurred.
8. Select a tab at the top of the screen to enter details for a specific type. This will navigate you to the section where you can enter financial information. Each tab has different criteria for information.

Personnel Tab

9. Use the Personnel tab for all commitments related to personnel, including new positions, start-ups, one-time-only position related expenses

Test 9.17.2024

OVERVIEW	PERSONNEL	CAPITAL	OTHER	TECHNOLOGY	SUMMARY	Save
----------	-----------	---------	-------	------------	---------	------

Please enter the Personnel information for the commitment

Title

Type

Description

Please enter the Personnel cost package for the commitment

Expenses	FTE	Transaction Type	From Index	From ACCT	To Index	To ACCT	Rollover	Base	Plan 2024	Plan 2025	Plan 2026	Plan 2027	
Primary													
+ Add Salary Detail													
▶ Benefits													
										\$0	\$0	\$0	\$0
Total Primary Expenses										\$0	\$0	\$0	\$0
Secondary													
Select Cost Select Cost to Add													
Total Secondary Expenses										\$0	\$0	\$0	\$0
Other Costs													
Select Cost Select Cost to Add													

- Title:** Description of this subsection of the request. This may be similar to the Name from the Overview section depending on the components included in the commitment.
- Type: Existing FTE, New FTE, Start-Ups**
- Description:** Opportunity to provide additional details regarding the commitment. Key components could include position description, current/former incumbent, any funding agreements if position is split funded, etc.
- Primary:**

Expenses	FTE	Transaction Type	From Index	From ACCT	To Index	To ACCT	Rollover	Base	Plan 2024	Plan 2025	Plan 2026	Plan 2027	
Primary													
Enter Description	0.000	Budget Adjustment	Select L	Select ..	Select L	Select ..	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0	0	
+ Add Salary Detail													
▶ Benefits										\$0	\$0	\$0	\$0

- Description:** Title of position or position number. This will become the comment in the budget adjustment.
- FTE**
- Transaction Type: Budget Adjustment, Journal Voucher, Not Applicable.** It will default to Budget Adjustment, and this will be the most used type. **Please note that for any Base position commitment, you will need to submit a position budget adjustment as normal.**
- From Index & Account:** Where the commitment is coming from. This can be left blank.
- To Index & Account:** Where the commitment is going to. This can be left blank.
- Rollover:** Select for a multi-year OTO commitment that will need an adjustment processed in each year. The amount for each year would need to be entered into each fiscal year's column.
- Base:** If this is a base commitment, select this check box.

- i. **Spread Tool (Calculator):** Tool which will distribute a total amount across multiple fiscal years.

- viii. **Plan “Fiscal Year”:** For each FY (10 years out) there is a box to put committed funds, if it is a base commitment only put it in the year it is being committed.

- ix. **Scroll to the right**

Expenses	FTE	Transaction Type	Index	From ACCT	Index	To ACCT	Plan 2031	Plan 2032	Plan 2033	Comments	Delete
Primary											
Enter Description	0.000	Budget Adjustment	Select I...	Select ...	Select I...	Select ...	0	0	0		<input type="checkbox"/>
+ Add Salary Detail											
▶ Benefits											
							\$0	\$0	\$0		
Total Primary Expenses							\$0	\$0	\$0		

- x. **Comments:** Additional spot for documentation
- xi. **Delete:** If you need to delete a line, select this check box and hit save.
- xii. **Benefits:** This will automatically populate based off FTE and Salary amounts. This is simply a calculation and is not part of the adjustment.

e. **Secondary:**

Expenses	FTE	Transaction Type	Index	From ACCT	Index	To ACCT	Rollover	Base	Plan 2024	Plan 2025		
Total Primary Expenses											\$0	\$0
Secondary												
Graduate Assistant											Cost Added	
▼ Graduate Assistant Expense											\$0	\$0
Enter Description	0.000	Budget Adjustment	Select I...	Select ...	Select I...	Select ...	<input type="checkbox"/>	<input type="checkbox"/>	0	0		
											\$0	\$0
Total Secondary Expenses											\$0	\$0

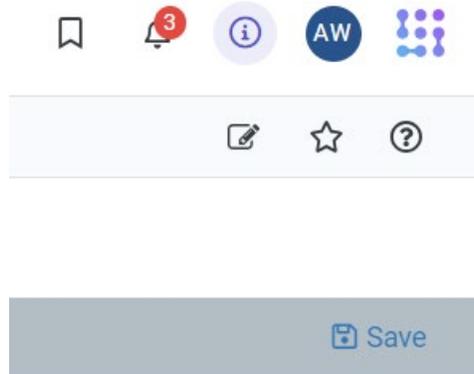
- i. **Select Cost: Fixed Term, Graduate Assistant, Research Assistant, Student.** This section functions the same as the Primary section, and is used for the personnel related to the Primary commitment.
- ii. Follow the same steps in 9.d.i-xi

f. **Other Costs:**

Expenses	FTE	Transaction Type	Index	From ACCT	Index	To ACCT	Rollover	Base	Plan 2024	Plan 2025									
Total Secondary Expenses											\$0	\$0							
Other Costs																			
Professional Development											Cost Added								
Enter Description											Budget Adjustment	Select I...	Select ...	Select I...	Select ...	<input type="checkbox"/>	<input type="checkbox"/>	0	0
											\$0	\$0							
Total Other Expenses											\$0	\$0							

- i. **Select Cost: Bonus/Ad-Comp, Moving Expenses, Other Personnel, Professional Development, Retirement.** This is the non-position, but personnel related part of the commitment. Fill in the details similar to the steps above, but without the FTE & position portion.

- g. **Saving:** When you need to save, click the blue save icon on the top right. You can come back and edit the same commitment, and there is no harm in saving often.



Capital Tab

10. Use the Capital tab for large equipment and projects, most likely something you are working on with Facilities.

Test 9.17.2024

OVERVIEW	PERSONNEL	CAPITAL	OTHER	TECHNOLOGY	SUMMARY	Save						
Please enter the Capital information for the commitment												
Type	Select Type											
Description	Enter Description											
Please enter the Capital costs for the commitment												
Expenses	Transaction Type	From Index	From ACCT	To Index	To ACCT	Rollover	Base	Plan 2024	Plan 2025	Plan 2026	Plan 2027	
Select Cost	Select Cost to Add								\$0	\$0	\$0	
Total Expenses								\$0	\$0	\$0		

- Type: New Build, New Equipment, Refurbish, Replacement.**
- Description:** Opportunity to provide additional details regarding the project.
- Select Cost: Construction, Furniture & Finishings, Install, Operations & Maintenance, Other Capital.**

Expenses	Transaction Type	From Index	From ACCT	To Index	To ACCT	Rollover	Base	Plan 2024	Plan 2025										
Other Capital	Cost Added							\$0	\$0										
Other Capital Costs <table border="1" style="width: 100%;"> <tr> <td>Enter Description</td> <td>Budget Adjustment</td> <td>Select L...</td> <td>Select ...</td> <td>Select L...</td> <td>Select ...</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>0</td> <td>0</td> </tr> </table>										Enter Description	Budget Adjustment	Select L...	Select ...	Select L...	Select ...	<input type="checkbox"/>	<input type="checkbox"/>	0	0
Enter Description	Budget Adjustment	Select L...	Select ...	Select L...	Select ...	<input type="checkbox"/>	<input type="checkbox"/>	0	0										
Total Expenses								\$0	\$0										

- Fill in this portion similar to the Personnel tab
- Remember to scroll to the right for the Delete option

c. Select Cost: Hardware, Infrastructure, Software.

Please enter the Technology costs

Expenses	Transaction Type	From Index	ACCT	To Index	ACCT	Rollover	Base	Plan 2024	Plan 2025
Hardware	Cost Added							\$0	\$0
Hardware Costs Enter Description: <input type="text"/> Budget Adjustment: <input type="text"/> Select L: <input type="text"/> Select: <input type="text"/> Select L: <input type="text"/> Select: <input type="text"/>								0	0
+ Add Detail									
Total Expenses								\$0	\$0

- i. Fill in this portion similar to the previous tabs
- ii. Remember to scroll to the right for the Delete option

Summary Tab

13. The Summary tab provides a total for the commitment, broken down by the types. It will include amounts for multiple years, not just the current Fiscal Year.

Test 9.17.2024

OVERVIEW	PERSONNEL	CAPITAL	OTHER	TECHNOLOGY	SUMMARY	
Funding	Total Commitment	Professional Development	Primary Personnel Salary	Capital Other Capital	Other Contracted Services	Technology Hardware
	\$170,000	\$9,000	\$50,000	\$75,000	\$30,000	\$6,000
Grand Total	\$170,000	\$9,000	\$50,000	\$75,000	\$30,000	\$6,000

Pushing to Budget and Revisions

14. Once the commitment is ready to be processed as a budget adjustment, open the existing commitment by going to the “Home” and selecting the blue square and arrow button on the specific adjustment.

AXIOM Commitment Planning ▾ | Home Reports ▾ | Commitment Utility Administration

Commitment Planning

ID	COMMITMENT	Type(s)	Status ↑	Org ↑
79	Test 9.16.2024	Personnel	▶ In Progress	421430 - Graduate School
81	Test 9.17.2024	Personnel, Capital, Other Operating	▶ In Progress	421430 - Graduate School

- a. Select "Approved" from the status drop down.

Test 9.17.2024

OVERVIEW	PERSONNEL	CAPITAL	OTHER
Commitment Information			
Name:	Test 9.17.2024		
Commitment ID	81		
Status	Approved		
Start Date	In Progress		
Created By	Approved		
Created Date	9/17/2024		
Requester	Enter Requester		
Requesting Org	421430		

- b. Hit save in the top right.
- c. Once you hit save, everything will be "greyed out" and you will see a Revise button above Save.

Test 9.17.2024 (Read-only)

OVERVIEW	PERSONNEL	CAPITAL	OTHER	TECHNOLOGY	SUMMARY	Revise	Save
Commitment Information							
Name:	Test 9.17.2024			Commitment Type(s):			
Commitment ID	81			Personnel <input checked="" type="checkbox"/>			
Status	Approved			Capital <input checked="" type="checkbox"/>			
Start Date	[Calendar]			Other Operating <input checked="" type="checkbox"/>			
Created By	Ann Wells			Technology <input checked="" type="checkbox"/>			
Created Date	9/17/2024			Commitment Categories:			
Requester	Enter Requester			Funding: Not Selected			
Requesting Org	421430			Strategic Goal: Not Selected			
Description:				Priority: Not Selected			

- d. **If you need to make a revision, you must do so before you have sent the commitment through to a budget adjustment.**
- e. To Revise the commitment, click the Revise button.

- f. This will automatically change the Status to Revised and you will need to add to the Discussion section to provide background for the revision.

Test 9.17.2024

OVERVIEW	PERSONNEL	CAPITAL	OTHER	TECHNOLOGY	SUMMARY
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Commitment Information

Name:	Test 9.17.2024	Commitment Type(s):	
Commitment ID	81	Personnel	<input checked="" type="checkbox"/>
Status	Revised	Capital	<input checked="" type="checkbox"/>
Start Date	<input type="text"/>	Other Operating	<input checked="" type="checkbox"/>
Created By	Ann Wells	Technology	<input checked="" type="checkbox"/>
Created Date	9/17/2024	Commitment Categories:	
Requester	Enter Requester	Funding	Not Selected
Requesting Org	421430	Strategic Goal	Not Selected
		Priority	Not Selected

Description:

Enter Description

Discussion

▲ Required

Add a comment

- g. Once you make revisions and add to Discussion, you can hit change the status to Approved (Revised) if it is ready to be approved and then hit save. Otherwise you can just save it as Revised.

Name:	Test 9.17.2024
Commitment ID	81
Status	Approved (revised)

- h. Now that the Commitment is Approved, it is ready to be pushed to budget.

- i. Go to the Commitment Utility in the top bar

AXIOM Commitment Planning ▾ | Home Reports ▾ Commitment Utility Administration

- j. The Commitment Utility will show you all your available commitments to push to budget

Integrate Commitments to Budget

Commit. ID	Name	Type	Status	REQUEST_ID	Date Submitted	Owning ORG
81	Test 9.17.2024	Personnel, Capital, Other Operating	Approved			421430

k. Select the blue commitment ID and the following will display

Commitment ID: 81 - Test 9.17.2024

Sub Type	Cost Type	Description	Fund Category	Transaction Type	From		To		Current FY	Budget Year	Plan Year 3
					INDEX	ACCT	INDEX	ACCT			
CAPITAL											
Capital Costs 5	Truck		Funding 1	BA	419420	62899	-	-	\$75,000	\$0	\$0
OTHER											
Costs - Other 1	External Marketing Services		Funding 1	BA	419420	62199	-	-	\$10,000	\$10,000	\$10,000
OTHER PERSONNEL											
PRIMARY FACULTY											
Primary Personnel Salary	Analyst		Funding 1	BA	419420	61199	-	-	\$50,000	\$0	\$0
SECONDARY PERSONNEL COSTS											
Secondary Personnel Cost 2	Conference Travel		Funding 1	BA	419420	62499	-	-	\$3,000	\$3,000	\$3,000
TECHNOLOGY											
Technology Costs 1	Computers for 3 new employees		Funding 1	BA	419420	62245	-	-	\$6,000	\$0	\$0

▲ [Push to Budget](#) [Cancel](#)

- i. This example does not have any “To” Indexes therefore it cannot be pushed to budget, but you still see an overview of everything that will be pushing to budget. Please note that any permanent position adjustments will not push to an adjustment and you will need to submit that adjustment separately as normal.

l. When all From and To indexes/accounts are filled in the Push to Budget button will be available like this

Commitment ID: 81 - Test 9.17.2024

Sub Type	Cost Type	Description	Fund Category	Transaction Type	From		To		Current FY	Budget Year	Plan Year 3
					INDEX	ACCT	INDEX	ACCT			
CAPITAL											
Capital Costs 5	Truck		Funding 1	BA	419420	62899	419421	62899	\$75,000	\$0	\$0
OTHER											
Costs - Other 1	External Marketing Services		Funding 1	BA	419420	62199	419421	62199	\$10,000	\$10,000	\$10,000
OTHER PERSONNEL											
PRIMARY FACULTY											
Primary Personnel Salary	Analyst		Funding 1	BA	419420	61199	419421	61125	\$50,000	\$0	\$0
SECONDARY PERSONNEL COSTS											
Secondary Personnel Cost 2	Conference Travel		Funding 1	BA	419420	62499	419421	62499	\$3,000	\$3,000	\$3,000
TECHNOLOGY											
Technology Costs 1	Computers for 3 new employees		Funding 1	BA	419420	62245	419421	62245	\$6,000	\$0	\$0

[Push to Budget](#) [Cancel](#)

- i. When you select Push to Budget, you will select Ok or Cancel and then it will take you back to the Commitment Utility and shows the Request ID for

the newly created adjustment.
Integrate Commitments to Budget

Commit ID	Name	Type	Status	REQUEST_ID	Date Submitted	Owning ORG
81	Test 9.17.2024	Personnel, Capital, Other Operating	Approved	7839	9/18/2024	421430

m. Now in the Axiom Windows Client you can find your adjustment by looking for the Request ID and opening it

FY24 Adjustment #7839

Created By Ann Wells on 09/18/24

Step: Adjustment Created

Status: Active

Approved: No

Index	Account	Type	Current FY24 Budget	New FY24 Budget	Difference (Increase or Decrease)	Comments
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0.00 << Total OTO Adjustments

BASE ADJUSTMENT

>> INSERT A NEW INDEX/ACCT (dbl click)

ONE-TIME-ONLY ADJUSTMENT

>> INSERT A NEW INDEX/ACCT (dbl click)

COMMITTED ADJUSTMENTS

419420	62199	OTO	\$0	-10,000.00	-10,000.00	External Marketing Services
419420	62245	OTO	\$0	-6,000.00	-6,000.00	Computers for 3 new employees
419420	62499	OTO	\$0	-3,000.00	-3,000.00	Conference Travel
419420	62899	OTO	\$0	-75,000.00	-75,000.00	Truck
419421	62199	OTO	\$0	10,000.00	10,000.00	External Marketing Services
419421	62245	OTO	\$0	6,000.00	6,000.00	Computers for 3 new employees
419421	62499	OTO	\$0	3,000.00	3,000.00	Conference Travel
419421	62899	OTO	\$0	75,000.00	75,000.00	Truck

- i. The adjustment shows the commitments and cannot be edited.
- ii. You can add an approver if someone needs to look it over before being processed.
- iii. You will need to move it forward to be processed just like any other adjustment.