MSU Budget New Fiscal Year Budgeting

Logging in to MSU Budget

1) Navigate to www.montana.edu/budget/msu_budget_axiom.html
2) Please see instructions for Mozilla Firefox and Google Chrome. Before using the system for the first time, you must download a clickonce app
   a. Download the a clickonce app for the appropriate browser
   b. If using Internet Explorer, no additional app is necessary
3) Once your clickonce has been installed, follow the link to the software: https://montanasu.axiom.cloud
4) Log in using your NetID and Password

Accessing the System

1) Once you have logged on, you will see the screen below.
2) Click on the waffle on the right-hand side and select Windows Client and install the software if it is your first-time logging in

3) The system will look like this when you log on

Running Initial report

1) Expand your Axiom Assistant by clicking the arrow on the top left corner
2) Navigate to Reports Library/Budget Reports/Annual Budgeting/New FY Budget Overview
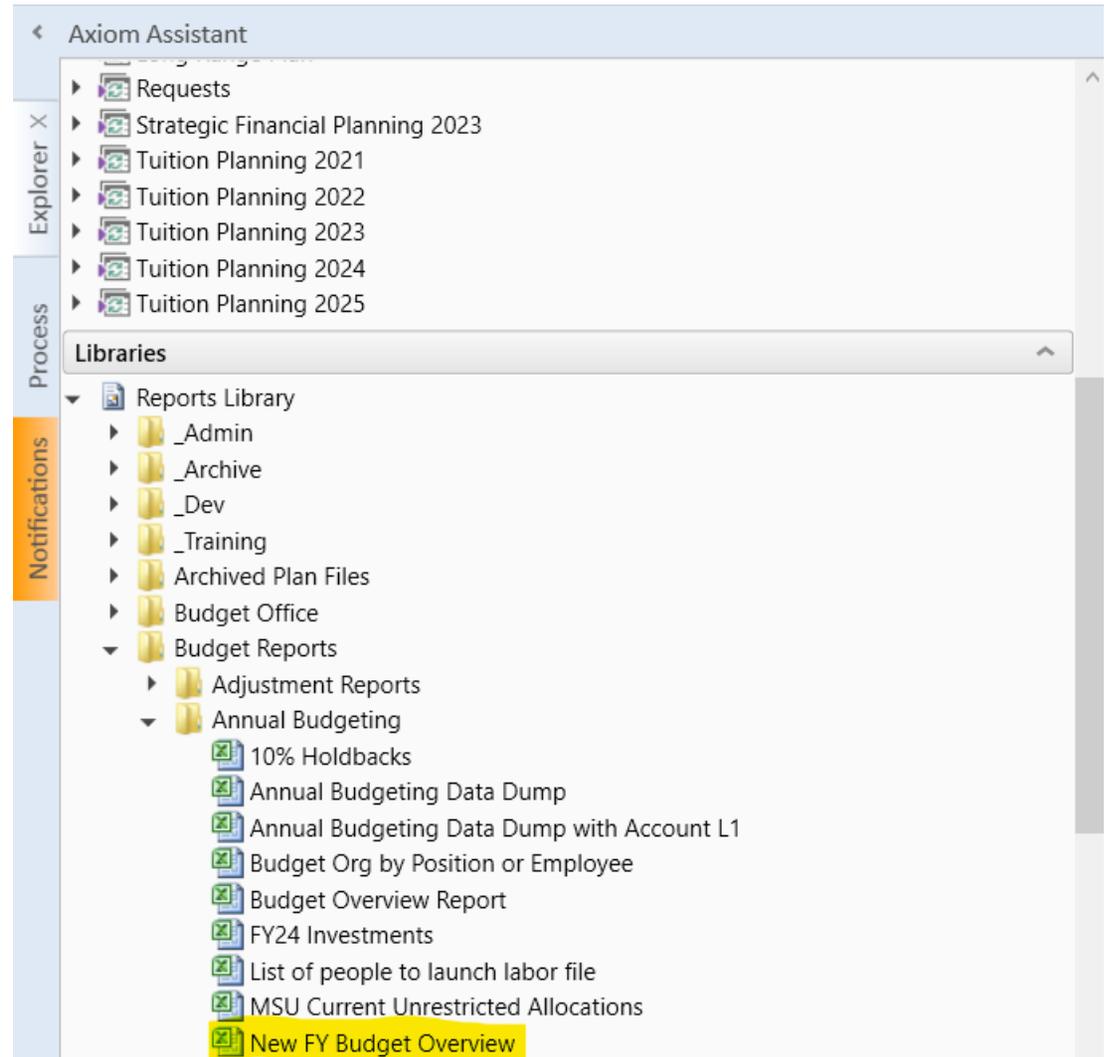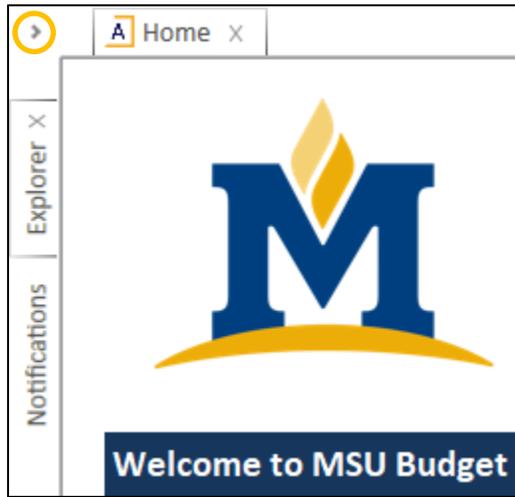
3) Double-click the report and enter your full org or a wildcard (partial) version of your org (i.e., 4122, 435, 44 etc.)

   a. Select New Fiscal year -- select the year that you are currently budgeting for (i.e., select 23 when budgeting for FY23)

   A Refresh Variables ✕

   Select Labor Distribution Org

418

   Select New Fiscal Year

21	∨

   [OK]   [Cancel]

4) The report will reflect your current proposed budget for the new Fiscal Year by index, account, and position. This is the starting point from which you can make changes.

   a. If positions are budgeted, you will see position level information

   b. For indexes that have revenue, you will see both a revenue and an expense section with a net total at the bottom

   Budget Prelim Report for ORGs 437%

Index	Fund	Org	Prog	Account	Employee Name	Proposed Budget
				TOTAL COSTS		250,759.68
						59,240.32
Early Return to Work						
433164	433164	437500	06	53350		30,000.00
				TOTAL REVENUE		30,000.00
433164	433164	437500	06	62889A		1,500.00
433164	433164	437500	06	62899		25,000.00
				TOTAL COSTS		26,500.00
						3,500.00
pus Antenna Lease						
433221	433221	437001	07	53631		115,000.00
				TOTAL REVENUE		115,000.00
433221	433221	437001	07	62102		11,130.00
433221	433221	437001	07	62249		5,000.00
433221	433221	437001	07	62701		2,000.00
433221	433221	437001	07	62889A		1,087.80
433221	433221	437001	07	68801		80,000.00
				TOTAL COSTS		99,217.80
						15,782.20

c. For indexes that don't have revenue (current unrestricted), you will only see expense information.

Budget Prelim Report for ORGs 437%								
Index	Fund	Org	Prog	Account	Employee Name	Proposed Budget	PosBudOrg	Position Title
4A7502	411201	437502	07	61125		0.00		
4A7502	411201	437502	07	61125	No Active Employee	50,687.47	437500	Training/Dev Coord
4A7502	411201	437502	07	61125		77,506.74	437500	Occup Safety/Health Spec II
4A7502	411201	437502	07	62104		200.00		
4A7502	411201	437502	07	62106		3,000.00		
4A7502	411201	437502	07	62186		107,613.00		
4A7502	411201	437502	07	62198		150.00		
4A7502	411201	437502	07	62208		11,000.00		
4A7502	411201	437502	07	62216		300.00		
4A7502	411201	437502	07	62244		400.00		
4A7502	411201	437502	07	62290		600.00		
4A7502	411201	437502	07	62319		1,100.00		
4A7502	411201	437502	07	62415		3,800.00		
4A7502	411201	437502	07	62706		1,500.00		
4A7502	411201	437502	07	62801		500.00		
4A7502	411201	437502	07	62802		1,000.00		
				TOTAL COSTS		259,357.21		

Updating Budgets in Labor Planning after Review

1) The MSU Budget Tab at the top of your ribbon is how you will access your Plan Files
2) To open your positions, click on '20## Budget' then 'Labor Plan' then 'Open Plan Files'
3) This will bring up a list of the orgs for which you have access
   a. Double-click on the org for it to open
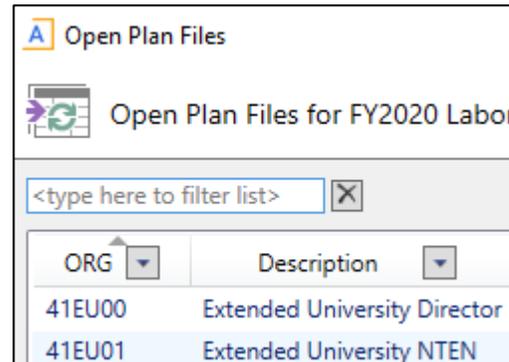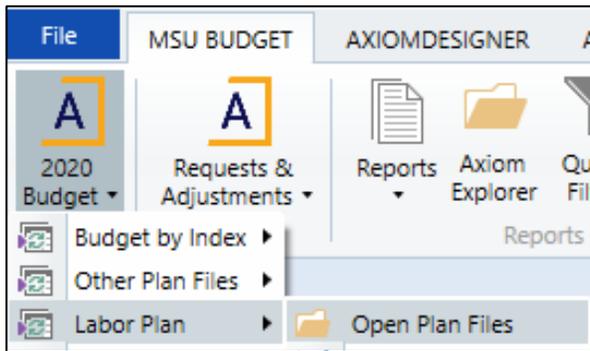
4) There are 4 sections (separated by color) included in your labor planning data
   a. **Section 1:** Information about the employee, index, account
   b. **Section 2:** Payroll information for each employee as of the snapshot date
   c. **Section 3:** Current budget information for each position/employee
   d. **Section 4:** New Fiscal Year Proposed Budget information which is where you can make updates

Index	Index Description	Account	FTE	Dist %	Current Salary Rate	FTE	Dist %	Current FY21 Budget	FTE	Dist %	Proposed FY22 Budget	FY22 Increase or (Decrease)
			Current Payroll Snapshot			**Current Budget Snapshot**			**FY22 Proposed Budget Information**			
4M1118		TOTAL			$44,683.59			$44,245.51			$44,683.59	$438.08
ECLS: SE Class Salaried-OT EX, 12 Pay STATUS-A			0.750	100.00%	$44,683.59	0.750	100.00%	$44,245.51	0.750	100.00%	$44,683.59	$438.08
402030		61125		100.00%	$44,683.59		100.00%	$44,245.51		100.00%	$44,683.59	$438.08
	>> ADD NEW INDEX/ACCT COMBO (dbl click)											
	Longevity Calc							$0.00				($0.00)
	Stipend		0.000	0.00%	$0.00	0.000	0.00%	$0.00	0.000	0.00%	$0.00	$0.00
	>> ADD NEW INDEX/ACCT COMBO (dbl click)											

*For single, filled, non-tenure-track faculty positions the payroll information is populating the budget information. The purpose is to more accurately budget across all fund types. All other positions are based off the Current Budget Snapshot.

5) Single, filled positions are at the top, then vacant positions, and then pooled positions
   a. You can navigate to the sections listed above or go to individuals using the 'GoTo Location' menu at the top
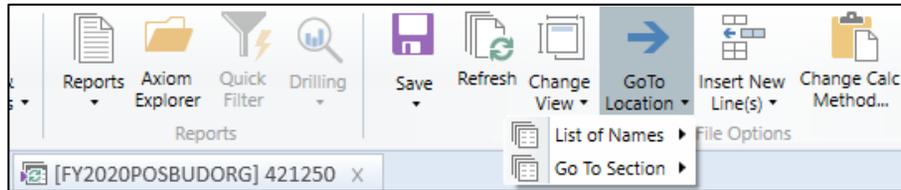
6) Cells that are blue may be updated
   a. To change the FTE select the blue cell under the "FTE column"
      i. Changing the FTE will update the Proposed FY## Budget amount for most filled, non-tenure-track faculty position. You can manually change these amounts after you update the FTE.
   b. To change position budget, select the blue cell under "Proposed FY## Budget"
      i. This will update the dist % and populate a value in the "FY## Increase or (Decrease)" column
   c. To change the index double click on "Add New Index/Acct Combo" (dbl click)
      i. This will pull up an options box, here you will type in the new index and account then select okay
      ii. The new index will appear under the indexes already listed for that position
      iii. Changing the individual indexes in blue will not update the amount in grey because it is tied to actual pay rates
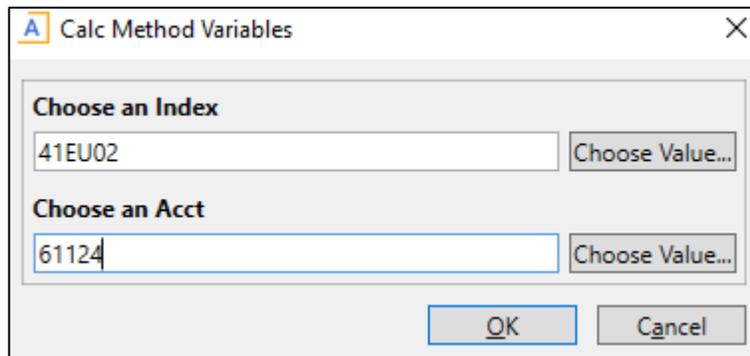
   d. If the position has a stipend, use the stipend line to add it to the position.
      i. Account code 61123D was created to identify stipends for budgeting purposes (i.e., not payroll purposes), all stipend related splits need to be updated to this account code.
   e. When adjusting positions be sure to use the blue boxes under the comments field with helpful descriptions in case you need to research an adjustment in the future.
   f. Do not budget grant indexes; this is completed in a different process.

7) EXAMPLE 1 (multiple splits with some grant funding)

Index	Index Description	Account	Current Payroll Snapshot			Current Budget Snapshot			FY20 Proposed Budget Information			FY20 Increase or (Decrease)
			FTE	Dist %	Current Salary Rate	FTE	Dist %	Current FY19 Budget	FTE	Dist %	Proposed FY20 Budget	
	Unassigned		<< Choose an approver									
SINGLE, FILLED POSITIONS												
4B0094		**TOTAL**			**$117,783.35**			**$25,640.50**			**$114,191.06**	**$88,550.56**
	ECLS: FL Non Tenure Faculty 12 Pay STATUS-A		1.000	100.00%	$117,783.35	0.300	100.00%	$25,640.50	1.173	100.00%	$114,191.06	$88,550.56
423284	Medical BioFilm Lyme Rsrch	61123N		0.00%	$0.00		45.45%	$11,654.77		0.00%	$0.00	($11,654.77)
433191	CBE Industrial Assco Membership	61123N		12.00%	$14,134.00		54.55%	$13,985.73		12.87%	$14,697.86	$712.13
433626	Medical Biofilm Lab	61123N		84.00%	$98,938.01		0.00%	$0.00		87.13%	$99,493.20	$99,493.20
4W5638	METHODS TO ASSESS BIOFILM	61123N		4.00%	$4,711.33		0.00%	$0.00		0.00%	$0.00	$0.00
	>> ADD NEW INDEX/ACCT COMBO (dbl click)											
	Pay Increases											
	Incr. #1: Pay Plan as of 02/01/19										$1,293.18	$1,293.18

8) EXAMPLE 2 (single split with MSU Budget making a change to current budget)

Index	Index Description	Account	Current Payroll Snapshot			Current Budget Snapshot			FY20 Proposed Budget Information			FY20 Increase or (Decrease)
			FTE	Dist %	Current Salary Rate	FTE	Dist %	Current FY19 Budget	FTE	Dist %	Proposed FY20 Budget	
	>> ADD NEW INDEX/ACCT COMBO (dbl click)											
4C0582		**TOTAL**			**$42,545.70**			**$0.00**			**$42,545.70**	**$42,545.70**
	ECLS: PF Professional Full-Time 12/26 STATUS-A		0.900	100.00%	$42,545.70	0.000	0.00%	$0.00	0.900	100.00%	$42,545.70	$42,545.70
433626	Medical Biofilm Lab	61124		100.00%	$42,545.70		0.00%	$0.00		100.00%	$42,545.70	$42,545.70
	>> ADD NEW INDEX/ACCT COMBO (dbl click)											
	Pay Increases											
	Incr. #1: Pay Plan as of 02/01/19										$486.63	$486.63

9) **EXAMPLE 3 (faculty with a stipend and increases of promotion, market, merit, or equity)**

Index	Index Description	Account	Current Payroll Snapshot			Current Budget Snapshot			FY20 Proposed Budget Information			FY20 Increase or (Decrease)
			FTE	Dist %	Current Salary Rate	FTE	Dist %	Current FY19 Budget	FTE	Dist %	Proposed FY20 Budget	
4A3907	Kurtz, Sahara	**TOTAL**			**$89,271.40**			**$86,806.47**			**$89,271.40**	**$2,464.93**
	ECLS: FA Faculty Tenure, 9/10/20 Pay STATUS-A		1.000	100.00%	$86,271.40	1.000	100.00%	$83,806.47	1.000	100.00%	$86,271.40	$2,464.93
411600	College Of Nursing	61123		100.00%	$86,271.40		100.00%	$83,806.47		100.00%	$86,271.40	$2,464.93
	>> ADD NEW INDEX/ACCT COMBO (dbl click)											
	Pay Increases											
	Incr. #1: Merit as of 02/01/19										$1,478.94	$1,478.94
	Incr. #2: Pay Plan as of 02/01/19										$1,014.96	$1,014.96
	Stipend		0.000	100.00%	$3,000.00	0.000	100.00%	$3,000.00	0.000	0.00%	$3,000.00	$0.00
411600	College Of Nursing	61123		100.00%	$3,000.00		100.00%	$3,000.00		100.00%	$3,000.00	$0.00
	>> ADD NEW INDEX/ACCT COMBO (dbl click)											

10) **EXAMPLE 4 (employee with additional longevity)**

Index	Index Description	Account	Current Payroll Snapshot			Current Budget Snapshot			FY20 Proposed Budget Information			FY20 Increase or (Decrease)
			FTE	Dist %	Current Salary Rate	FTE	Dist %	Current FY19 Budget	FTE	Dist %	Proposed FY20 Budget	
4M0111	Stewart, Beverly	**TOTAL**			**$33,899.24**			**$33,028.44**			**$34,161.31**	**$1,132.87**
	ECLS: SF Classified Salaried, 12/26 Pay STATUS-A		1.000	100.00%	$33,899.24	1.000	100.00%	$33,028.44	1.000	100.00%	$34,161.31	$1,132.87
4A7035	Campus Custodial Ser	61125		100.00%	$33,899.24		100.00%	$33,028.44		100.00%	$34,161.31	$1,132.87
	>> ADD NEW INDEX/ACCT COMBO (dbl click)											
	Longevity Calc							$0.00			$2,383.35	

Updating Revenue and Operating Budgets after Review

1) To access the budget files, go to '20## Budget' then 'Budget by Index' then 'Open Plan Files'
2) Select the index you would like to work on and double click
   a. Please note these are indexes and not orgs
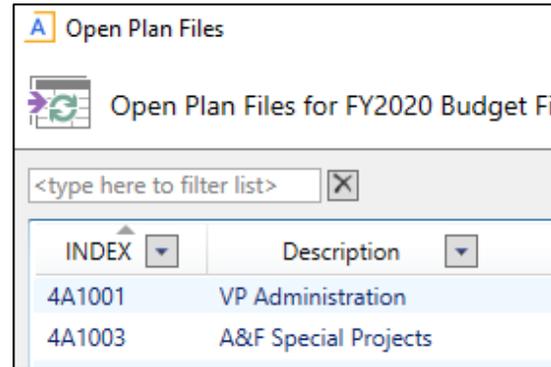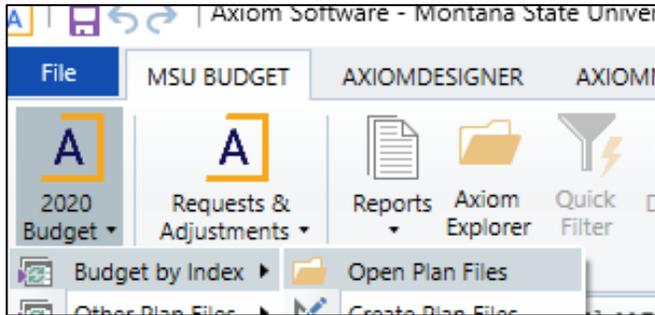
3) The information from labor planning will pull over and is not updateable in these plan files. If you need to complete Labor Plan edits, close the Budget by Index file and re-open after you have saved the changes in the Labor Plan file.
4) Current Budget Amount is used as the starting point for the New Fiscal Year for non-position account codes.
5) Cells that are data enterable are blue
6) To update budgets, select the blue cells under "FY## Proposed Budget" and enter the total FY## proposed budget for each account code if different than what is showing. Be sure to update the blue boxes under the comment field with helpful descriptions in case you need to research an adjustment in the future

Index 615002
FY20 Budget

			Allocation		Balance
			$0.00		($362,866.89)

Account	Account Description	3 Yr. Average	FY19 Actuals (Ytd)	FY19 Current Budget	Driver Increase %	FY20 Proposed Budget	Add'tl Amount	Change Amount	% Change over FY19 Projection
	[skip]								
	Revenue >>	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
	Costs >>	339,525.32	231,309.06	310,774.00	0.00	362,866.89	0.00	362,866.89	6.9%
	Diff >>	(339,525.32)	(231,309.06)	(310,774.00)	0.00	(362,866.89)	0.00	(362,866.89)	6.9%
62282	Ink	$983.70	$561.00	$0.00	0.0%	$0.00	n/a	0.00	-100.0%
62299	General Supplies	$0.00	$0.00	$15,948.00	0.0%	$15,948.00	n/a	0.00	0.0%
62304	Postage & Mailing	$3,455.11	$2,515.00	$0.00	0.0%	$0.00	n/a	0.00	-100.0%

Run MSU Current Unrestricted Allocations Report

1) Navigate to Reports Library/Budget Reports/Annual Budgeting/MSU Current Unrestricted Allocations

2) Double-click the report. The report will automatically limit to indexes you have security access to, but if you want to narrow to specific units you can select 'Refresh' on the MSU Budget section of the top ribbon.

A Refresh Variables	✕
Fiscal Year	
23	⌄
Division (optional)	
Choose a value for FYEMonitorExec.	Choose Value... ✕
Unit (optional)	
Choose a value for FYEMonitorUnit.	Choose Value... ✕
OK	Cancel

3) Report will display all base items that will be included in your allocation. Within a unit, such as a college, you may reallocate internally. If you choose to do so, please document any movements, as the amount in this report cannot be changed to reflect internal changes. If a unit does not match their total allocation due to internal reallocating, it will be the responsibility of the unit to determine where the misalignment occurred. You can save this file as a local file similar to previous examples in this instruction guide if you would like to add your comments.

Index	Index Title	FY22 Beginning Base Budget	FY22 Current Base Budget	FY23 Pay Plan, Promotion & Longevity Changes, and Annualization of FY22 Market, Merit, Equity & Promotion	Multi-Wage Increases	Position Budget Requests	Program Fee Changes	Fixed Costs	Other Central Adjustments	FY23 Base Budget Allocation	FY23 Base Budget Allocation vs FY22 Current Base Budget
Academic Affairs											
Academic Technology & Outreach											
41EU02	ATO Operations	925,764	925,764	10,961	45,641	-	-	-	-	982,367	56,602
41EU03	ATO Teaching & Learning Tech Bright	411,572	411,572	6,114	5,457	-	-	-	-	423,143	11,571
	Academic Technology & Outreach Total	1,337,336	1,337,336	17,075	51,098	-	-	-	-	1,405,510	68,173
	Academic Affairs Total	1,337,336	1,337,336	17,075	51,098	-	-	-	-	1,405,510	68,173

Tips and Reminders

1) There are several reports available for your use in this process under Budget Reports:
    a. New FY Budget Overview: shows total budgeted for new fiscal year in each index compared to revenue or allocation
    b. List of People to Launch Labor File: If you are unsure where to find an employee, you can use this report to determine which POSBUDORG (i.e. Org for Labor Plan file) they are in
    c. Prior Year vs Current Year Position Budgets: This report shows the difference in position budgets from Current FY end point to what is currently input for New FY

2) If you are changing FTE in a CUF index, use 61399 as a placeholder for the contribution to/return from the institutional benefits pool. Once budgets are finalized, the Budget Office will conduct a review of FTE/benefits to ensure appropriate funding and move money, as needed.

3) For stipends, please update in "Stipend" section. Account code (61123D) was created for stipends to assist with reporting. Similar to the 61123R used for NSF/HERD reporting, it will be for budget purposes only.

4) Budgeting for staff related teaching is done at the account code level in the "Budget by Index" files
    a. 61123M- classified OT instruction
    b. 61123C- non-faculty contract instructional add comp
    c. 61123A- faculty contract instructional add comp

5) Admin Fee in 62889A will automatically be calculated for the indexes that are necessary

6) Do not budget more than $5,000 in Account 62899

7) Always log in to the Windows Client