## Training Resource Matrix

<table>
<thead>
<tr>
<th><strong>Budget &amp; Planning System (Axiom)</strong></th>
<th><strong>General Process Overview</strong></th>
<th><strong>Labor Planning</strong></th>
<th><strong>Operating Budget</strong></th>
<th><strong>Budget Request</strong></th>
<th><strong>All Funds</strong></th>
<th><strong>RCM Planning</strong></th>
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</thead>
<tbody>
<tr>
<td>Process Flow Chart</td>
<td>Modules Flow Model</td>
<td>n/a</td>
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<td>n/a</td>
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<tr>
<td>Self Paced Training</td>
<td>Labor Planning</td>
<td>In Development</td>
<td>In Development</td>
<td>In Development</td>
<td>RCM Metrics</td>
<td></td>
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<tr>
<td>Slides with Scenarios and Solutions</td>
<td>Labor Planning Scenarios &amp; Solutions</td>
<td>Op Budget Scenarios &amp; Solutions</td>
<td>(Refer to Self-Paced Module)</td>
<td>(Refer to Self-Paced Module)</td>
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<tr>
<td>Terms, Definitions, Guidelines</td>
<td>-Pillar 5</td>
<td>-Labor Definitions</td>
<td>-Op Budget Definitions</td>
<td>-Budget Request Definitions</td>
<td>-All Funds Definitions</td>
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<tr>
<td>FAQ</td>
<td>-Getting Access</td>
<td>-General</td>
<td>-Budget Request</td>
<td>-All Funds</td>
<td>RCM Metrics</td>
<td></td>
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<tr>
<td>*In-Person Training</td>
<td>FY 20 General Presentation</td>
<td>(2)</td>
<td>(2)</td>
<td>Faculty Recruitment</td>
<td>(4)</td>
<td>(5)</td>
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<tr>
<td>Calendars</td>
<td>Planning Dates</td>
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</tr>
<tr>
<td>Office Hours</td>
<td>Per Request</td>
<td>Week of Feb 10</td>
<td>Week of Feb 24</td>
<td>Week of Feb 24</td>
<td>Per Request</td>
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<tr>
<td>Reporting in Axiom</td>
<td>In Development</td>
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</tbody>
</table>

**FAQ**
- Getting Access
- About the System
- Position Planning
- Other Labor
- Why Labor Slides

**Terms, Definitions, Guidelines**
- Pillar 5
- Module Definitions
- Provisioning Guidelines
- Labor Definitions
- Pay Period Spread
- Op Budget Definitions
- Sponsored Revenues & Expenses
- ERE Sweep Utility
- Commitment Transfers
- Budget Request Definitions
- Faculty Recruitment Guidelines
- All Funds Definitions
- Narrative Questions

**In-Person Training**
- FY 20 General Presentation
- (1)

**Calendars**
- Planning Dates

**Office Hours**
- Per Request
- Week of Feb 10
- Week of Feb 24
- Week of Feb 24
- Per Request

**Reporting in Axiom**
- In Development
Budget & Planning System (Axiom)

Training Resource Matrix

* In-Person Training Footnotes:

1. General Overview was presented in the All Funds Kick-Off Meetings on January 27th and 28th. Presentation slides are available on our website in the News/Communication > University Communication section.

2. In-Person Training on Labor Planning & Operating Budget was offered to the Ambassadors and took place in December 2019. Ambassadors role will be to train their financial teams in late January and early February using the tools and resources shared with them on January 21st. Those tools are listed above in the Terms, Definitions, & Guideline, FAQ, Calendar, and Slides with Scenarios and Solutions.

3. Budget Request Module access will vary by college. Some colleges will require their departments to input for new faculty and other colleges may enter at the college level. At this time, the only in-person training that will be offered will be related to the Faculty Recruitment Plans and the Provost Office and RII will lead that training alongside The Office of Budget and Planning.

4. All Funds Module access will be limited to college and division finance leaders. An In-person training may take place after go-live in the form of office hours similar to how RCM Planning Module training was offered.

5. RCM Planning Training was offered as office hours a week before go-live and the week of go-live. The user group for this module is limited to college and division leadership so the training was targeted to this smaller group.