Axiom 2016 How To Guide

The purpose of this document is to show you how to run UCLs most commonly run report, Project Balances Report, in Axiom 2016. While this guide will focus on a single report it should be used as a more general guide to the principles of running reports in Axiom 2016 Web Reporting. The steps discussed below can easily be transferred to any of the other reports available.

How to run a Project Balances report in Axiom 2016

Logging in to Axiom 2016

Users can navigate to Axiom reporting by going to: http://www.ucl.ac.uk/finance/myfinance and clicking on the “Axiom Reporting Login” icon.

After clicking the link above you will need to logon to Axiom 2016 web:

Username is your normal UCL user name and then associated password. Please note the Domain should default to “AD” and should remain set to that.

When logged in you will be greeted with a “landing page” which is currently the income and expenditure report as below:

Figure 1 - Axiom 2016 Log in page

Figure 2 - Landing Page example
Navigating to a report

To find and run the Project Balances report you will need to go to the “Navigation Pane” which is found by clicking on the three lines seen at the top left of Axiom 2016. Once the navigation pane is open you can select the Project Balances report which can be found under: Reports, Income & Expenditure, Project Report – Project Balances.

The report will open with default filters and values, in the case of the Project Balances report this means it will initially open with no values displayed.

Applying filters
To populate a report you will need to set your filters, which can be done from the “Filters” menu:

Under the filters, you will need to apply a period and any other relevant filter fields to ensure you get the data you require.
You can then sort the data according to your need as any column that is in blue and underlined can now be sort from ascending to descending. The sorting can be reversed by clicking the column heading a second time. The data below has been sorted on column heading Expenditure current year:
Drilling

In Axiom 2016 any figure that is underlined can be “drilled” on to retrieve more information on the figure. Once you click on the amount i.e. 763,366.36 seen above this will open up a new tab, where we drill from the Project Balances report to the Transactions Report for that individual project.
Drilling in this case will provide a full break down of transactions on that project.

The transaction report has an additional feature of searching text descriptions. This allows users to search for anything under the “Transaction Description” column. For example, If you wanted to search for lines containing “NHS” under the description, I would search the following i.e. “NHS” in the search bar as shown below.

Thus making the process easier to search for specific lines as opposed to exporting the data and then filtering on it.
Navigation

As you can see, this report has four pages worth of information to display. You can use the left/right arrows to navigate page by page. It is also possible to navigate to a particular page by typing the page number into the box (which is situated on the left side of the double arrows) you will then need to click on the double arrows to enable the report to skip to page 3 for example.

Downloading

You can download the report by clicking on the icon, found in the top left of the report.

When you click on the download icon, the following pop up will appear:

Once you click OK it will then prompt you with the below message

The file will open/save automatically with the file name of FormattedGrid1.xlsx, therefore make sure you save the report with the name your preference. Please bear in mind the next time you download any report you will get the following message if you haven’t saved the file under a different name or have it opened.