PROJECT OBJECTIVES

- *Streamline* the budget allocation process and position tracking

- *Reduce* the amount of budget data maintained in Excel

- *Reduce manual* effort required to compile budget templates

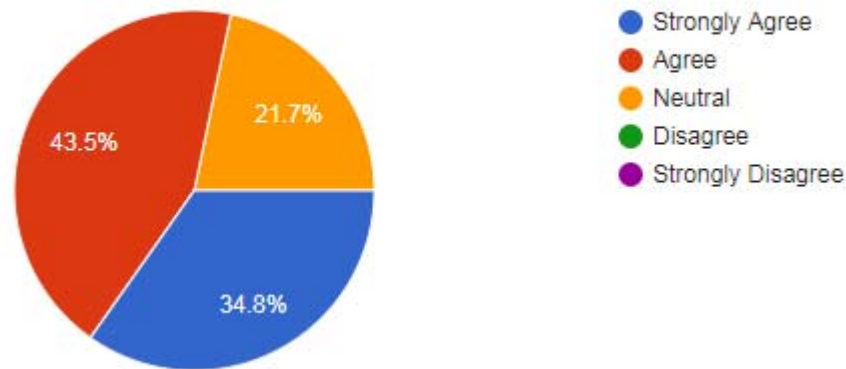- *Reduce administrative time* currently spent emailing and tracking budget files

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SURVEY HIGHLIGHTS

- 30% of active users responded – Thank you!!
- Overall impression of PBCS for budget preparation is favorable

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SURVEY RESULTS - TRAINING

- Survey responses indicate training is adequate
  - Majority of responders strongly agree or agree that training documentation and in person sessions were adequate.

- Feedback indicates more training is desired

BFPO Response:

- Offer "refresher" sessions prior to FY20 Allocation
- Expand training documentation based on feedback
- Develop training videos

SURVEY RESULTS – OPEN LAB SESSIONS

- 48% of responders attended 1-2 sessions

- 39% of responders attended 3-4 sessions

- Majority of responders felt they would not have been able to complete their budget without attending an open lab

BFPO Response:

- Offer open lab sessions during the FY20 Allocation

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SURVEY RESULTS – POSITION BUDGETING

Position Info (Forms 1.1a and 1.1d)

- Majority of responses to all questions were favorable

- Feedback indicates the need to "freeze panes"
  - BFPO Response – unfortunately, the ability to freeze panes is not available for technical reasons

- Feedback indicates the need to sort by department
  - BFPO Response – Form 1.1a is for viewing by department

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Position Salary Allocation Forms (1.2a or 1.2b)

- Majority of responses to all questions were favorable

- Feedback indicates slow response time
  - BFPO Response – rules aggregate data to college level; data maps move data to reports; fringe calculates on save.

- Feedback regarding comments
  - BFPO Response – unfortunately, we were unable to include a comments column

- Feedback regarding confusion on split positions
  - BFPO Response – expand training to cover split positions

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SURVEY RESULTS – TO BE HIRED

- Majority of responses to all questions were favorable

- Feedback indicates clarification needed on when and how to use the form
  - BFPO Response – training will be expanded to include when and how to use this form

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SURVEY RESULTS – GRAD ASSISTANTS

- ~62% of responders agree or strongly agree that the Grad Form meets their department budget needs

- Feedback indicates historical information and FTEs assigned would be valuable

  – BFPO Response: Historical information can be obtained from Position Report: Position Funding. FTEs assigned to a college is out of scope.

- Feedback received on the inability to budget partial FTEs

  – BFPO Response: Form does allow for partial FTEs

    (form settings have been revised to show two decimal places)

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SURVEY RESULTS – NONCOMP INPUT FORMS

- Majority of responses to all questions were favorable

- Feedback indicates users need the ability to add fringe for internal payroll

  - BFPO Response – in discussions with Huron on the best solution

- Feedback received on the inability to sort on program code

  - BFPO Response – The Unrestricted Funds Review Form (3.2) allows review at the CFS level

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SURVEY RESULTS – NONCOMP INPUT FORMS

- Feedback suggests a listing of all CFS that require a budget be provided
  - BFPO Response –A download from PeopleSoft Financials can provide CFS with current activity.

- Feedback received on inability to download to Excel
  - BFPO Response – Training will be updated to show the "Spreadsheet Export" functionality

- Feedback on viewing comments
  - BFPO Response – comments entered in the comments column cannot be aggregated to college level or be viewed in reports

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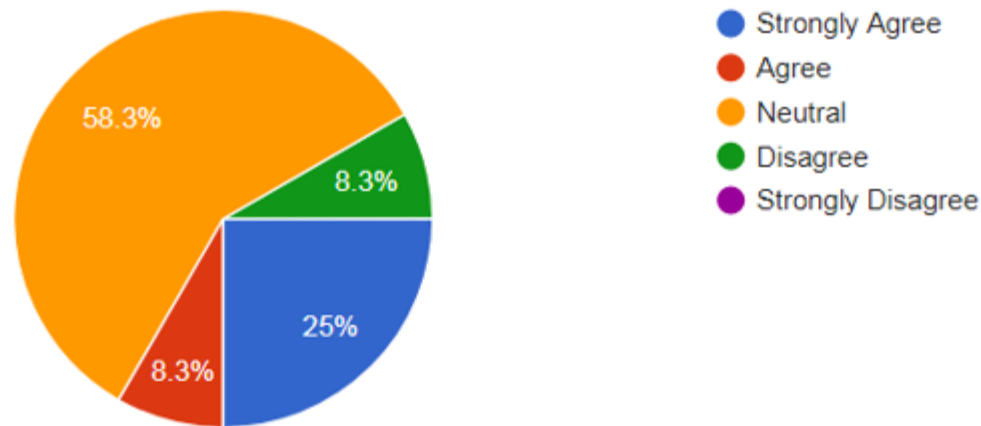
SURVEY RESULTS - TRAILS

- Majority of responses to trail questions were favorable

- Feedback indicates confusion on with/without fees
  - BFPO Response: Update User Variable Listing to include "with fees" program numbers and how to track to "with fees" bottom line on the input forms

- Feedback indicates issue downloading and filtering Trail in Excel
  - BFPO Response: Training will be updated to show the "Spreadsheet Export" functionality and how to filter in Excel

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SURVEY RESULTS – AUX ENT FEES

This form meets the needs of my department for budgeting fee revenue.

- Issue with calculations for Aux/Enterprise Fee revenue resolved
- Comments provided addressed different concerns

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REVIEW FORMS

- Responses indicate all review forms were used
  - BFPO Response - Continue to support all review forms; to be reviewed post FY20 Allocation.

- Feedback indicated the inability to see all comments
  - BFPO – unfortunately, comments cannot be aggregated
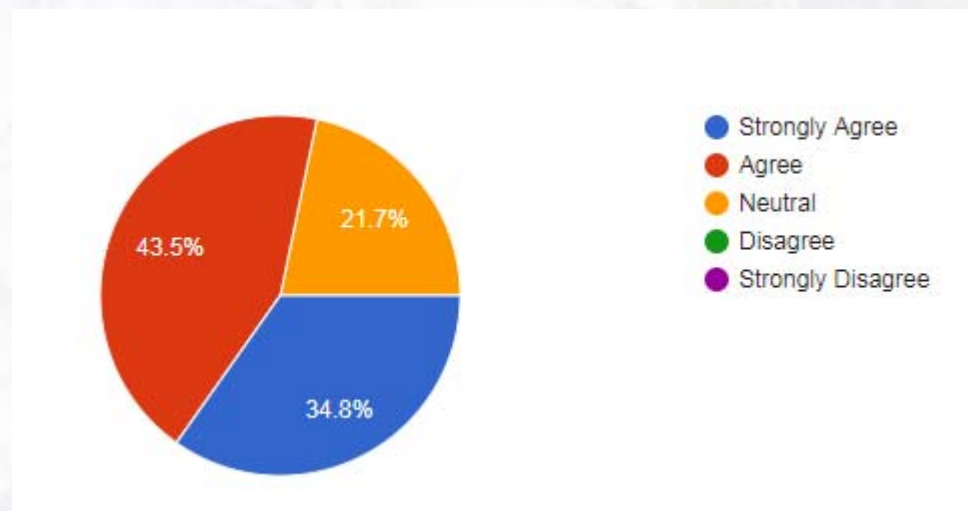
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REPORTS

- Responses indicate the following reports were most valuable:
  - Operating Revenue and Expenses by Fund
  - Position Report: Position Funding

- Comments indicate current report comparisons are not meaningful
  - BFPO Response: Please send us comparisons that are valuable

- Training video to be developed on accessing reports

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OVERALL IMPRESSION

- Majority of responses indicate overall impression of PBCS for budget preparation is favorable

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OVERALL IMPRESSION

Users indicated the following –

"PBCS is a huge improvement from the excel spreadsheets"

"I found PBCS easy to navigate, and for the most part, user friendly"

"Overall impression is very favorable"

"I really think that this new system will save time and effort…"

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PBCS UPDATES

BFPO will use the following to keep users up to date:

- PBCS Listserv (for all active users)

- BFPO Website (https://web.uri.edu/budget/pbcs/)
  - Training Documentation
  - Training videos (coming soon!)
  - Access Forms
  - User Variables
  - Password Management

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