UR Budget

Demo Days Meeting

November 2017
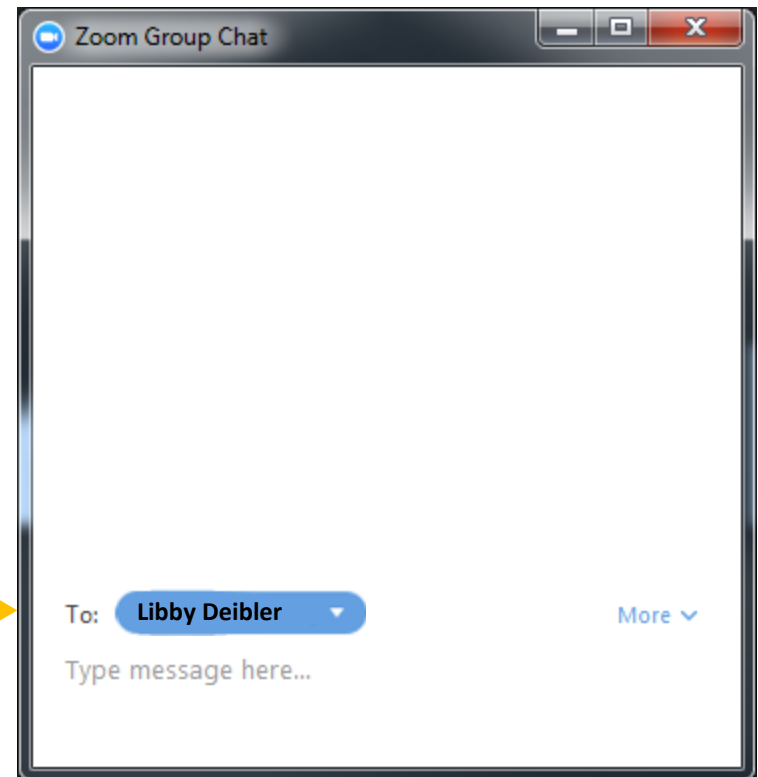
Chatting for Zoom Participants

For those joining the Zoom:

- 1) Please access the chat feature at the top of your screen

- 2) Please chat directly with **Libby Deibler** (She will then pose the questions on your behalf)

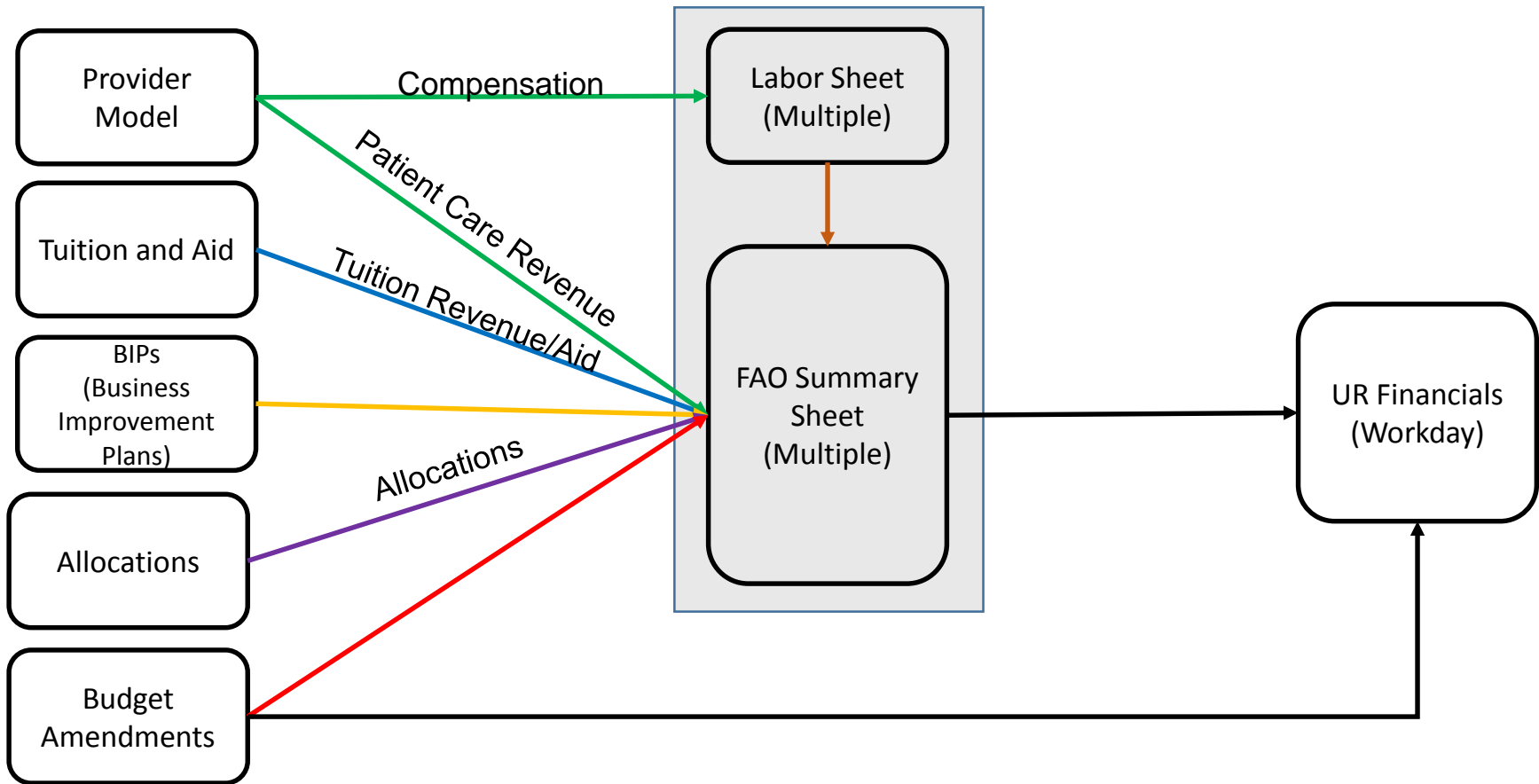- 3) Select **Libby Deibler** in the drop down menu in the chat window (do not select "everyone")

Agenda

- Updated training schedule

- Go-live dates per division

- Review key website posts

- Key Learning from Early Adopters

- Support Structure

- Questions and Answers

UR Budget Data Flow

Provider Model → Compensation → Labor Sheet (Multiple)

Provider Model → Patient Care Revenue → FAO Summary Sheet (Multiple)

Tuition and Aid → Tuition Revenue/Aid → FAO Summary Sheet (Multiple)

BIPs (Business Improvement Plans) → FAO Summary Sheet (Multiple)

Allocations → Allocations → FAO Summary Sheet (Multiple)

Budget Amendments → FAO Summary Sheet (Multiple)

Labor Sheet (Multiple) → FAO Summary Sheet (Multiple)

FAO Summary Sheet (Multiple) → UR Financials (Workday)

Budget Amendments → UR Financials (Workday)

Training Schedule – Instructor Led

Month	Mon AM	Mon PM	Tue AM	Tue PM	Wed AM	Wed PM	Thu AM	Thu PM	Fri AM	Fri PM
September										
October		16							19	
			24							
	30	30		31						
November	6	6			8		9		10	10
	13			14	15		16			
			21	21						
		27		28	29	29	30			
December									1	1
									1	
		4	5	5		6	7			
				12	13	13	14	14	15	15
		18		19	20		21			
							28			
January							4			
	8	8							12	12
			16		17					

Class	Legend	Hours	Classes
Summary Labor		4	22
Provider		4	7
BIP		2	13
Budget Amendments		2	2
Highland Sum/Labor		4	4

- ELearning course should be taken approximately 2-3 weeks prior to instructor led training

- Student Guides available for all students

- Subject Matter Experts (SMEs) will attend each session to answer content specific questions

- Provider + BIP classes broken down into separate Provider and separate BIP classes

- If you have received an invitation to attend training, you need to attend

UR Budget Go-Live Schedule

Company	Nov. 1	~~Dec. 20~~ Jan. 2	Jan. 10
010 Central Administration (Benefits go-live in October)	Live		
020 River Campus Colleges	Live		
080 University General	Live		
090 Health Sciences	Live		
040 School of Medicine and Dentistry		X	
050 Strong Memorial Hospital		X	
060 School of Nursing		X	
091 UR Medical Faculty Group		X	
092 Eastman Institute for Oral Health		X	
124 Highland Hospital			X
021 School of Arts and Sciences			X
022 E Hajim School of Engineering			X
023 W Simon Graduate School			X
024 M Warner Graduate School			X
030 Eastman School of Music			X
070 Memorial Art Gallery			X

Key Website Posts

- Resources
  - Tools folder

- FAQs tab

- Training tab
  - Training Schedule
    - Revised on 11-08
    - Medical Center Workshops
  - Student Guides
  - Quick Reference Cards (QRCs)
  - Quick Reference Videos (QRVs)

Key Learnings from Early Adopters

- Many of the new FAQs are based on feedback provided in the training classes

- Initial installation of PCs hasn't been much of a problem. It is a one time installation

- Apple Mac users – special access instructions. Please let us know if you are a Mac user

- Instructor led training is a must

- …. Audience participation opportunity

How Are You Going to Get Ready for UR Budget?

General Understanding	Prior to Go-Live	At Go-Live	Post Go-Live
• Attend Demo Days	• Take ELearning course for general navigational skills	• Verify that you have access and proper security	• Participate in "Ask The Experts" sessions
• Visit UR Budget website	• Attend Instructor-led training courses	• Participate in "Ask The Experts" sessions	• Contact Divisional Finance Office
• Contact Project Leadership Team	• Participate in a Hands-On session	• Contact Divisional Finance Office	• Review Quick Reference Cards (QRCs)
	• Participate in User Acceptance Testing (UAT)	• Contact Project Leadership Team	• Review Quick Reference Videos (QRVs)

UR Budget

Post Go-Live

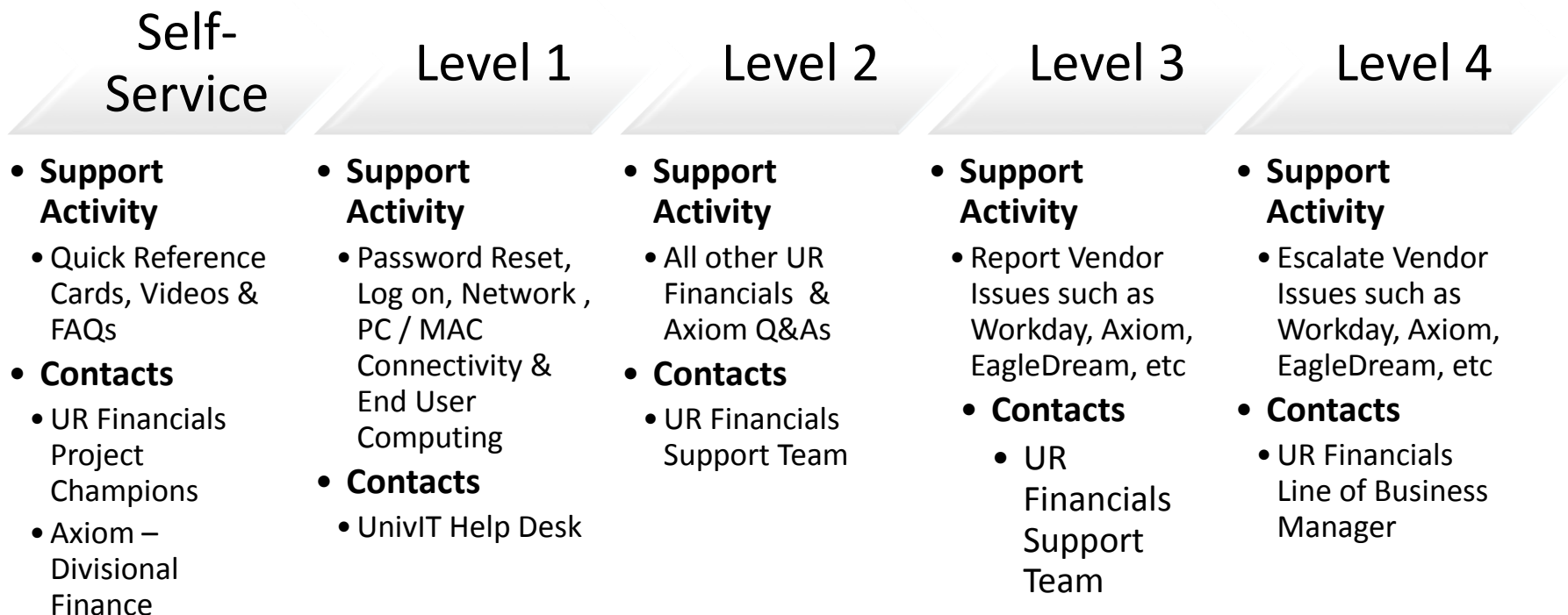| Participate in Med Center Workshop sessions	Contact your local Divisional Finance Office	Review Quick Reference Cards	Review Quick Reference Videos
• Not only for Med Center users • Expected to be held twice a week in the Med Center 2-8513 TLL room • Additional assistance available if you have problems or need assistance	• Many of the divisional finance personnel have been involved in testing and development of training material • If still require assistance, see box to the right	• How to download add-ins • How to access UR Budget from a Mac • Summary/Labor Plan file • Provider Plan file • BIP • Budget Amendments • One for Each Report	• Required Downloads (1 time) - October • Summary Plan File Overview - November • Labor Plan File Overview - November • Provider Plan File Overview - December

UR Budget Support Structure

Self-Service	Level 1	Level 2	Level 3	Level 4
Support Activity	**Support Activity**	**Support Activity**	**Support Activity**	**Support Activity**
• Quick Reference Cards, Videos & FAQs	• Password Reset, Log on, Network , PC / MAC Connectivity & End User Computing	• All other UR Financials & Axiom Q&As	• Report Vendor Issues such as Workday, Axiom, EagleDream, etc	• Escalate Vendor Issues such as Workday, Axiom, EagleDream, etc
Contacts	**Contacts**	**Contacts**	**Contacts**	**Contacts**
• UR Financials Project Champions	• UnivIT Help Desk	• UR Financials Support Team	• UR Financials Support Team	• UR Financials Line of Business Manager
• Axiom – Divisional Finance				

Questions

Upcoming Events

- Schedule for upcoming Demo Days / User Group sessions
  - December 11th
    - 3:30-5:00pm, Class of '62 Auditorium in the Medical Center
  - Medical Center workshops
  - Calendar year 2018 UR Budget User Groups - TBD