

UR Budget

Demo Days Meeting

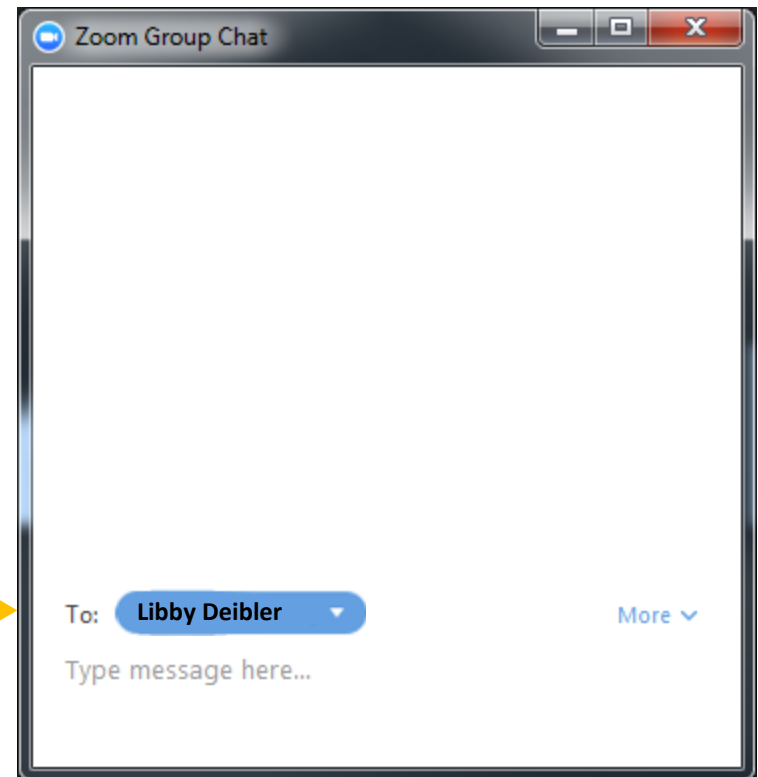
December 2017



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

- UR Budget Workflow “Stages”
- Revised Training Schedule
- Review Key Dates
- UR Budget Website Tour
- Support Structure
- Questions and Answers

UR Budget Workflow “Stages”

- UR Budget plan files (Summary/Labor and Provider) have workflow designed to transition to various stages
- When you make changes to plan files and Save them, you get a message if you want to “Move the file to the next stage”
- Answering “Yes” moves the plan file to the next stage and puts the file in read only mode for the user
- Plan files can be reverted back to a prior stage only by Master System Users (MSUs) that are listed on the UR Budget Home Page

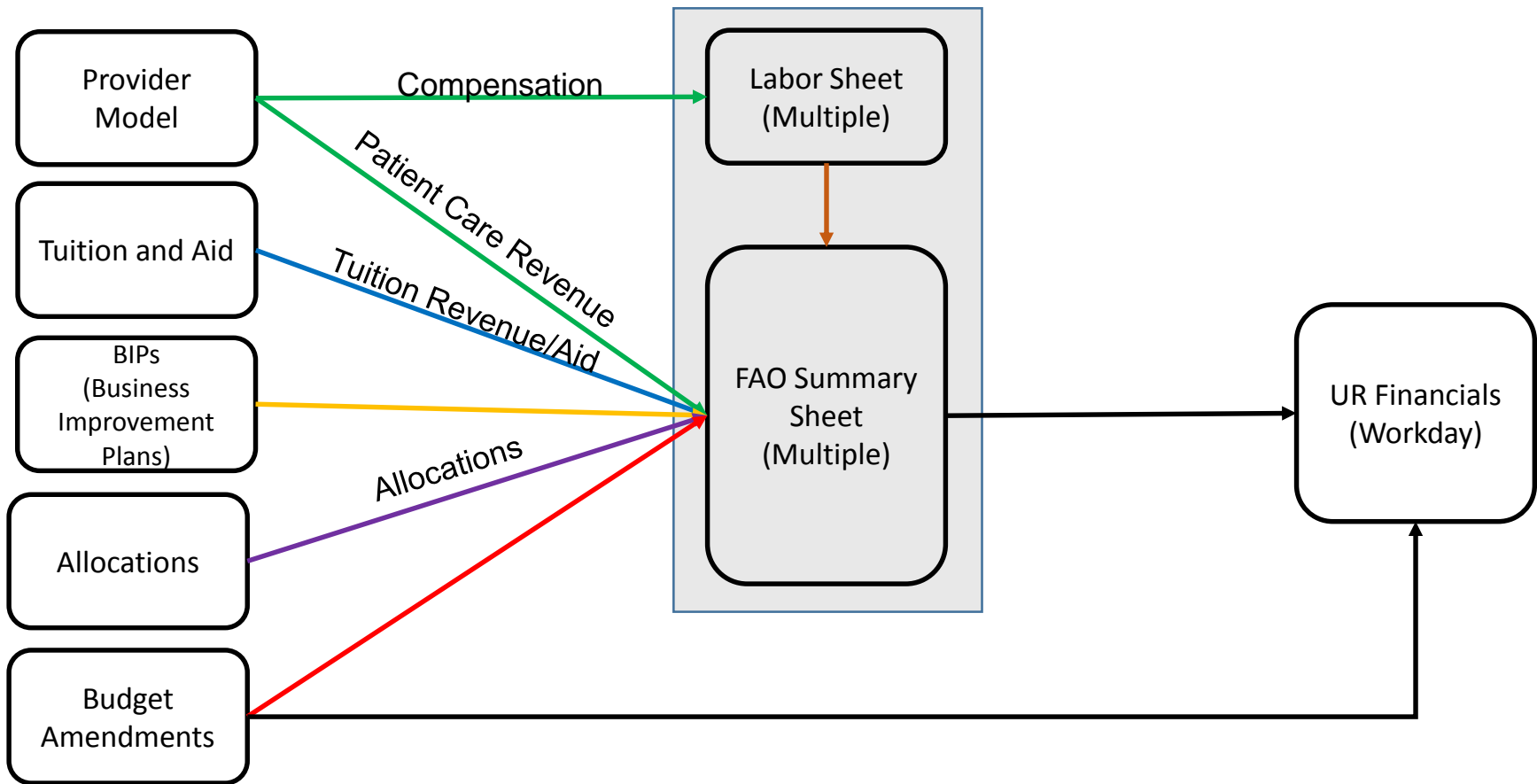
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UR Budget Workflow “Stages”

Workflow Stage	Description	Master System Users (MSUs)	Budget Approver	Company Finance	Users
MSU Prep	Verification of data by Master System Users prior to opening for all users	R/W	R/O	R/O	R/O
Budget Developer	System open for general input of budget information	R/W	R/W	R/W	R/W
Divisional Finance Review	Budget data in review by divisional finance offices	R/W	R/W	R/W	R/O
Budget Approver	Budget data approved by Central Budget Office	R/W	R/W	R/O	R/O
MSU Checkout	Budget data is locked and ready to be loaded into UR Financials	R/W	R/O	R/O	R/O

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UR Budget Data Flow



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
December				12	13	13	14	14	15	15
		18		19	20		21			
January							4			
	8	8							12	12
			16		17					
Class	Legend	Hours	Classes	11/27 Changes:						
Summary Labor		4	19	12/28/2017	Remove S/L					
Provider		4	7	1/8/2018	Remove S/L					
BIP		2	15	1/12/2018	Remove S/L					
Budget Amendments		2	2	1/8/2018	Add BIP					
Highland Sum/Labor		4	5	1/12/2018	Add BIP					

- **Revised on 11/27**
- 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
- **If you have received an invitation to attend training, you need to attend**

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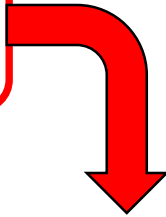
UR Budget Go-Live Schedule

Available
to users

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

UR Budget Website Tour - Resources

- Resources
 - Tools folder



UR Budget website

Frequently Asked Questions (FAQs)

How Will UR Budget System Impact Me?

Will Highland Hospital be impacted?

Who will be trained?

More FAQs...

Key Announcements

Welcome to UR Budget!

Meet the UR Budget
Project Leadership Team

About ▾ News ▾ Resources ▾ Calendar Training ▾ FAQs Logon Contacts

Tools

This section will contain resources that will assist end users in accomplishing specific tasks within the UR Budget system or budget process. This would include the following:

[UR Budget Project Champions](#)

[UR Budget Provider Group Administrators 20171101](#)

[Sub-Total to Ledger Account to FAC Map](#)

[UR Budget Job Codes](#)

Benefit Rate Table -> https://www.rochester.edu/orpa/_assets/pdf/prop_FY18BenefitRateDetail.pdf

FY19 Budget Schedule -> <http://www.rochester.edu/admin/budget/documents/FY19PlanningCalendar.pdf>

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UR Budget Website Tour – Training

Training ▾

- Training Schedule
- Student Guides
- Quick Reference Cards (QRCs)
- Quick Reference Videos (QRVs)

Below is the training schedule for UR Budget Classes as of 11/27/17.

Training Logistics – New as of 11-27

Also available at the Med Center are workshops to assist you as you familiarize yourself with the UR Budget application. To sign up, please select one of the dates and times via this link ->
<http://www.signupgenius.com/go/5080a4cabad29a3f58-urbudget7>

Link to the eLearning Course -> <https://rochester.csod.com/LMS/LoDetails/DetailsLo.aspx?loid=23107a4f-c057-4291-a9a3-f2d559ef8660&query=%3Fs%3D%26q%3Dur%252520budget&back=%2FGlobalSearch%2FSearch.aspx%3Fs%3D%26q%3Dur%252520budget#t=1>

- UR Budget Summary and Labor Student Guide 20171006
- UR Budget Summary and Labor Student Guide 20171024 – Highland Hospital
- UR Budget BIP Training Student Guide 20171023
- UR Budget Provider Model Student Guide 20171030

UR Budget Website Tour – Training

Training ▾

- Training Schedule
- Student Guides
- Quick Reference Cards (QRCs)**
- Quick Reference Videos (QRVs)

Below are links to the Quick Reference Cards. Please print out these out for your review.

UR Budget General QRCs

1. [UR Budget Introduction QRC 10-16-17](#)
2. [UR Budget Introduction Highland QRC 10-16-17](#)
3. [UR Budget First Time Installing Axiom – PC and Mac QRC 10-16-17](#)
4. [UR Budget How to Unlock a Locked Plan File QRC 11-10-17](#)

Summary / Labor Planning QRCs

1. [UR Budget Summary Plan File QRC 10-20-17](#)
2. [UR Budget Labor Plan File QRC 10-20-17](#)
3. [UR Budget URB103 Form B Report QRC 10-18-17](#)
4. [UR Budget URB202 PCW Report QRC 10-18-17](#)
5. [UR Budget Job Code Labor Plan File QRC 11-08-17](#)

Provider Planning QRCs

1. [UR Budget Provider Plan File QRC 11-10-2017](#)

Business Improvement Plan (BIPs) QRCs

1. [UR Budget BIP Plan File QRC 10-20-17](#)

Below will be links to Quick Reference Videos for on demand learning by area and topic.

UR Budget Axiom Add In Download Process 20171031

UR Budget Website Tour - FAQs

FAQ Topics

Frequently Asked Questions and answers are located below for easy information retrieval. Visit often for additions to this list:

0 - All FAQs
1 - UR Budget System
2 - General
3 - Summary FAQs
4 - Labor FAQs
5 - BIP FAQs
6 - Provider Model FAQs
7 - Tuition FAQs
8 - Highland Hospital FAQs
Contacts
Training

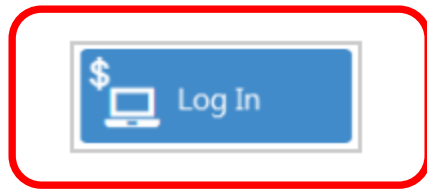
- All FAQs contains all the FAQs regardless of topic area
- FAQs may be in multiple topic areas based on where it is relevant
- FAQs are frequently added based on user emails, training, etc.
- You too can suggest a new FAQ to be added !

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UR Budget Website Tour – Log On

UR Budget Logon

Select the Log In button below and enter your Net ID and password. Once authenticated, select the *Windows Client* icon at the top of the page to access the UR Budget system.



Only use this one once you have completed training



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



UR Budget

How Are You Going to Get Ready for UR Budget?

General Understanding	Prior to Go-Live	At Go-Live	Post Go-Live
<ul style="list-style-type: none">Attend Demo Days	<ul style="list-style-type: none">Take ELearning course for general navigational skills	<ul style="list-style-type: none">Verify that you have access and proper security	<ul style="list-style-type: none">Participate in “Ask The Experts” sessions
<ul style="list-style-type: none">Visit UR Budget website	<ul style="list-style-type: none">Attend Instructor-led training courses	<ul style="list-style-type: none">Participate in “Ask The Experts” sessions	<ul style="list-style-type: none">Contact Divisional Finance Office
<ul style="list-style-type: none">Contact Project Leadership Team	<ul style="list-style-type: none">Participate in a Hands-On session	<ul style="list-style-type: none">Contact Divisional Finance Office	<ul style="list-style-type: none">Review Quick Reference Cards (QRCs)
	<ul style="list-style-type: none">Participate in User Acceptance Testing (UAT)	<ul style="list-style-type: none">Contact Project Leadership Team	<ul style="list-style-type: none">Review Quick Reference Videos (QRVs)

Post Go-Live

Participate in Med Center Workshop sessions

- 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

Contact your local Divisional Finance Office

- 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

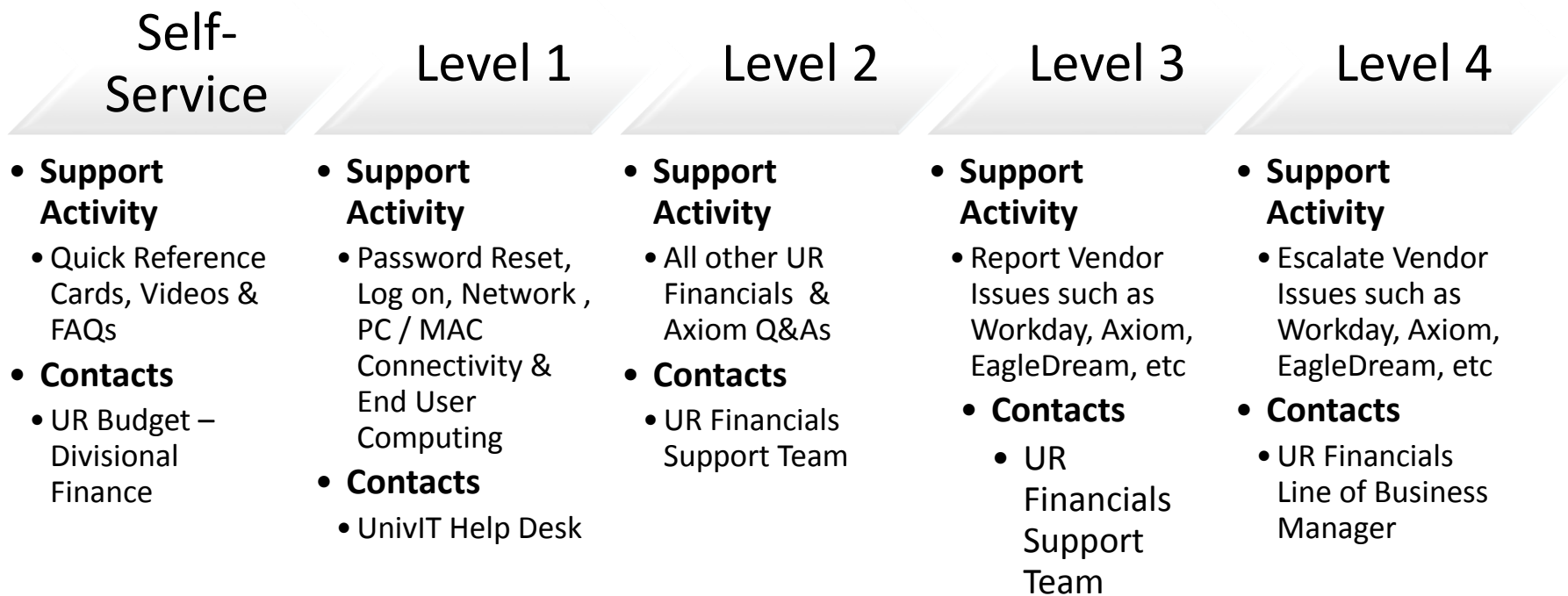
Review Quick Reference Cards

- 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 Many Reports

Review Quick Reference Videos

- Required Downloads
- Summary Plan File Overview
- Labor Plan File Overview
- Provider Plan File Overview – coming in December

UR Budget Support Structure



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Questions



Upcoming Events

- Schedule for upcoming Demo Days / User Group sessions
 - Medical Center Help Sessions (see Training schedule tab on the UR Budget website)
 - Calendar year 2018 UR Budget User Groups – In process of being scheduled

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