



Budgeting & Planning Project Information Session

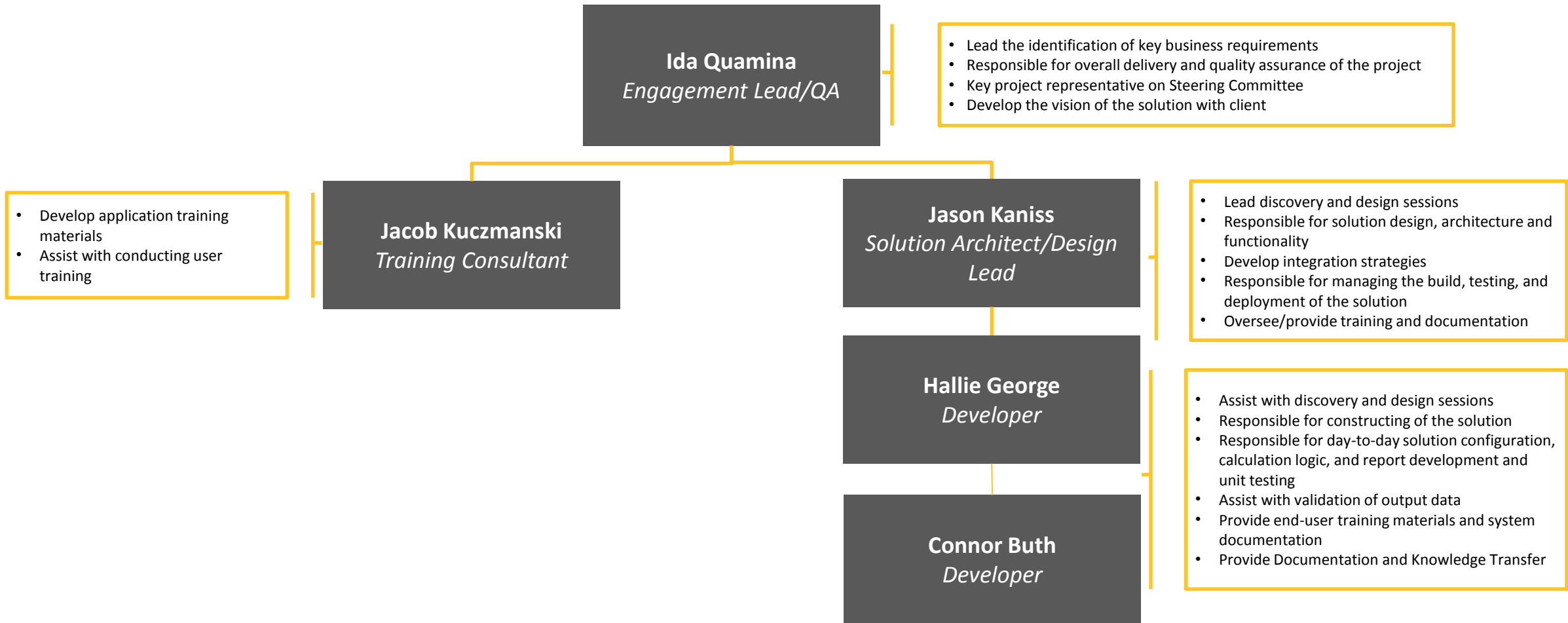
July 11, 2017

The Budget Office has started a technology project that will provide the institution with the ability to modernize, streamline, simplify, and enhance our integrated budgeting, planning, and forecasting processes through data-driven decision making.



What is PBCS	The Benefits	
<ul style="list-style-type: none"> • Purpose built cloud based enterprise planning tool 	Single source of all budget and planning data (revenue and expenses)	Shifts end users' time from collecting to analyzing
<ul style="list-style-type: none"> • Built on a multi-dimensional OLAP database engine (Essbase) 	Ensures data is complete and accurate through the use of standardized calculations and validation rules	Ability for end users to conduct their own analysis (ad-hoc, standard and visual reporting)
<ul style="list-style-type: none"> • Includes (but not limited to): <ul style="list-style-type: none"> • Forms / Dashboards • Calculations • Navigation Flows 	Ability to create repeatable and maintainable import processes for source data used in the budgeting and planning process (Financials, Student, HR)	Ability to create various scenarios and models based on trends and changes in driving factors (i.e. Enrollment Modeling)
<ul style="list-style-type: none"> • Approvals / Workflow • Reporting • Ad Hoc Analysis 	Ability to roll up and drill down to different levels of information (College, Department, Fund, Account)	Create multi-year plans and forecasts that provide the ability to make proactive decisions
<ul style="list-style-type: none"> • Security 	Ability to aggregate budget information quickly and easily	Conduct more frequent budget to actual variance analysis

Introduction to Huron Planning & Budgeting Team

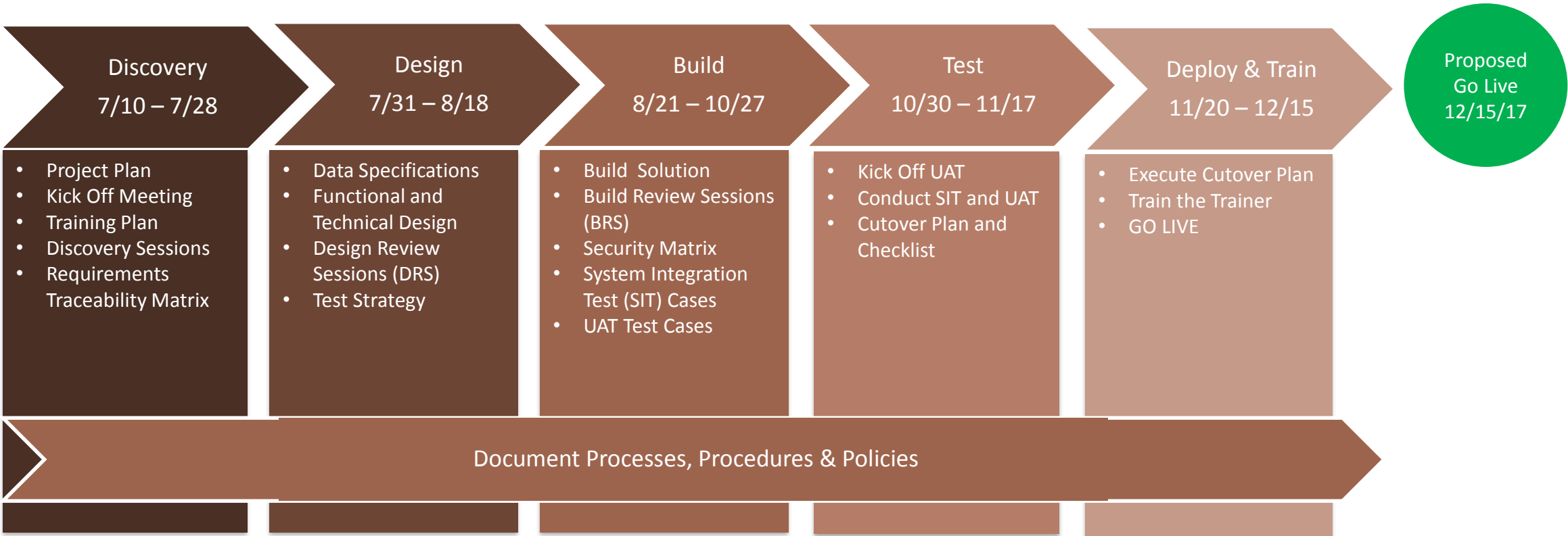




Budgeting & Planning University Specific Project Roles

	Responsibilities	Time Commitment	Role
PMO	<ul style="list-style-type: none"> Work closely with Huron team leadership to manage day-to-day project operations Obtain project resources, resolve scoping issues, communicate project status Develop and maintain project plans 	15-25%	Project Manager
			Change and Training Lead
Business Analyst	<ul style="list-style-type: none"> Assist with project activities; design, build, testing, deployment Learn system functionality and processes necessary to support the solution post go-live Provide application support on-going post go-live 	80%	Budget Office Designee
Subject Matter Experts Functional (SMEs)	<ul style="list-style-type: none"> Assist in the identification of key requirements Provide input on Solution requirements and impact of changes to the current operating environment Assist the design of the functionality and high level process flows Assist with Data tie-out/validation 	40%	Business Managers
			Executive Council
			HR (Position Budgeting)
			Chart of Accounts SME
			Financial Reporting
			Budget Office
Technical Leads	<ul style="list-style-type: none"> Assist with metadata and data integration Assist with System Integration Testing and UAT 	20%	GL Integration
			PPM Integration
			HR Integration

Project Timeline



THE PROCESS

The purpose of these sessions is to generate requirements for the Planning & Budgeting Cloud Services technology solution to be implemented to support the university's budgeting processes.



- All funds revenue and expense budgeting
- Position budgeting
- Forecasting and variance analysis
- Multi-year planning

WHAT TO BRING

Any tools (spreadsheets, reports, etc.) which are currently used to support your budget process

WHAT TO EXPECT

90 – Minute Sessions

- Overview of Planning & Budgeting Cloud Services
- Review and Discuss the Current Budgeting Process
- Discuss Challenges and Pain Points
- Discuss and Review the Desired State

Discovery Session Groups

	Functional Groups	University Resource
Business Managers	Athletics	Debbie Allred, Josh Johnson
	Arts & Sciences	Laurie Sanchez
	Agriculture	Catherine Harris
	Business, Engineering and School of Energy Resources	Karen Rhodine, Megan Barber, Rachel Ferrell
	College of Health Sciences	Laurie Kempert
	Education, Law, Library	Sandra Roller, Shauna Bury Laurie Mendick, Kimberly Jo Montez
	Residence Life & Dining	Jami Miller, Jana Schott
	Plant Operations, IT	Darcy Bryant, Margaux Christensen
	Foundation	Jeremy Page, Mary Ann Garman
	Auxiliary Services, General Counsel, President's Office	Carolynn Smith, Fawn Killion, Matt Coulter
	Academic Affairs, Student Affairs	Michelle Peck, Christina Millemon, Kathie Hull, Tami Benham-Deal
	Research Group, Wyoming Public Media	TBD
	Enrollment Management	TBD
Human Resources	HR – Position Budgeting	Sheralyn Farnham, Jeanne Durr
Reporting and Chart of Accounts	Chart of Accounts	Megan Hanneman, Janet Lowe
	Financial Reporting	Ashlie Reese, Sue Koller, Jan Adair
Budget Office	Budget Office	David Jewell, PJ Shumway, Jill Jensen, Kathy Dempsey
VPs, Executives and Deans	VP Fiscal Administration	Janet Lowe
	University Executives	Executive Council
	Deans & Directors	Deans & Directors

PBCS DEMO

