

FY 2022

Enrollment and Tuition Revenue Budget Process User Guide

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Navigation

Initial Access

To gain access to PBCS, please complete the PRISM User Access Information Form found on the PRISM website at <u>https://prism.pitt.edu/access/</u>. [Note that all RC Business Managers and anyone who responded to Kathy Tosh's December 2020 request for designated tuition module users were given access to PBCS and can login as described below.]

Oracle automatically sends an email from Oracle Cloud <u>oraclecloudadmin_ww@oracle.com</u> when your user account has been established in PBCS. However, security roles need to be assigned by Budget & Financial Reporting (BFR) before access is complete. Please wait until Student Financial Services sends a confirmation that your access is available before attempting login.

Logging into PBCS

https://planning2-a536919.pbcs.us2.oraclecloud.com/HyperionPlanning

PBCS is single sign-on enabled with the Pitt Passport service. Select the *Company Sign In* button. If you are already logged into Pitt Passport, PBCS will automatically open or you will be directed to the Pitt Passport login.

SIGN IN TO ORACLE CLOUD	
Traditional Cloud Account	
I Password Can't access your account?	Want to use your company account? Use to be redirected to the company single sign-on. Company Sign In Remember my choice @

NOTE: If using the link from the Oracle Cloud email, you will be directed to the My Cloud Home page. From there, click the *planning2* service, and you will see the above screen.

BROWSER NOTE: Firefox and Chrome are the supported browsers; if issues occur, please try both browsers before submitting a help request.

Adding a Favorite or Bookmark

Once you have logged in to the *Planning and Budgeting Cloud: Tuition* home page, you can create a favorite or bookmark within your browser to save the link. By adding the favorite at this point, you will be logged into the home page directly rather than going through the My Cloud Home page. The favorite will appear with "EPM Cloud," however, you can edit the name.

PBCS Home Page

E University of Pittsburgh	Planning and Budgeting Cloud: Tuition				â 🕏	hll14 -
Navigator			Function Icons		Home Accessibility Settings	Settings/ Actions
Activity	Heather-HLL14 Recent Favorites	Tasks	Reports	Application		Actions
Anno	uncements are displayed here.					

- **Navigator** Use the Navigator menu to access functions, applications settings and preferences. Under the Preferences link, you can manage several personal preferences such as email options, display options and printing options. For example, in display options you can change the number formatting such as negative number display and thousand separator.
- Home Use the Home button to quickly return to the home screen from any window.
- Accessibility Settings Use the Accessibility Settings button to apply the screen reader mode or high contrast.
- **Settings/Actions** Use the Settings and Actions drop down link to sign out, view the Oracleprovided help documentation and access the Oracle Cloud Customer community.
- **Function Icons** Use the various function icons to access functions assigned to your role in PBCS.
- Announcements Announcement regarding the overall system will be posted in the Activity/Recent/Favorites section.

Selecting Report Output Types

Reports can be available in three outputs: HTML, PDF and XLS.

HTML – This will create an on-line HTML version of the report that supports the drilldown functionality

PDF – This will create a PDF version of the report and is best for printing reports.

XLS – This will create an Excel version of the report.

HTHL

×LS

Navigation

Hierarchies

In the PBCS Tuition module, there are multiple hierarchies established for data entry and reporting including School, Program, Term and Tuition Attributes.

When using the hierarchy to select values, you will see all levels regardless of your assigned security. If you select a value that you do not have security access to, no data will be returned, and you may receive an error message if all accounts selected are outside of your security access.

Select a Member				Cance <u>l</u>
School "Dietrich Sch Arts and Sciences"				
Search School				\$
Total School without Medicine	SVC and Provost SC)	Education & General	^
SVC and Provost SO	Education & General	►	Dietrich Sch Arts and Scien	
SVC Health Sciences and Dea	>		Katz Grad School of Business	
			School of Education	
			Swanson School of Engineering	
			School of Law	
			Grad Sch of Pub & Int'l Affrs	
			School of Social Work	
			School of Computing and Inf ►	
			UC for Social & Urban Resea	-

Entering Report and Form Parameters

Reports and forms can require selection of *Member* segment values. Many have default parameters based on the associated security groups assigned. Many of the Tuition reports are by fiscal year, the current default is FY22.



Logging out of PBCS

Log out of PBCS by selecting the drop down arrow next to your name in the upper right corner of the window, then select Sign Out. A second Sign Out window will appear, click Cancel to remain logged in to PBCS. Click OK to continue logging out.

You will then be returned to a SIGN OUT ORACLE CLOUD window, click Ok. You must complete this to completely log out of PBCS.

Resource Proposal Steps	Relation State Heather-HLL Settings and Actions Reload Navigation Flow Downloads Help Cloud Customer Connect Provide Feedback Oracle Support About	Sign Out Do you want to end your sess OK Cano	
		N OUT ACLE CLOUD	
		 itional Cloud Account out of Oracle Cloud	2

User Preferences

The first time you enter the Tuition module, users will need to set their School to enable data entry and reporting.

- 1. Click the Tools icon.
- 2. Select User Preferences.
- 3. Click the icon on the right side to select your school, you can search for your school in the search school box.
- 4. Click OK, and the Save.

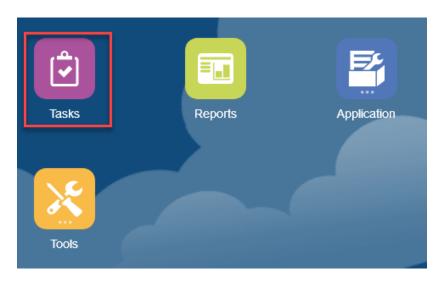
Preferences				Save
General	User Variable	es		
Display	Dimension	User Variable	Member	
Notifications	School	School2	SHRS	
Ad Hoc Options				
User Variables				
Reports				
Form Printing				

incol IRS					
Search School					K
School		Total_School		Total_School_Without_Medicine	
Total_School	•	Total_School_Without_Medicine	•	SO02	Þ
		SO04	×.	SO03	
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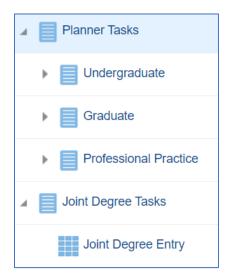
Enrollment Data

Entering Enrollment Data

1. Select the Tasks icon from the home screen.



- 2. Select Planner Tasks and complete data entry for all Career Levels.
 - Graduate and Professional Practice have one form for ALL terms, while Undergraduate has a separate form for each term. Undergraduate also has a breakdown for Career Level (Freshman, Sophomore, etc). Residency is now required to be split across in-state, out-of-state, and international classifications).
 - The tuition rates are pre-populated in the forms, you will not be able to change this information.
 - If you do not have access to enter data on a particular form ALL of the cells will be gray.



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Undergraduate Form

- 1. Enter Enrollment and Credit Hours for every category of student (freshmen, sophomore, etc.; note the new requirement for international residency).
- Click the + icon next to Adjusted Headcount, to open the columns to enter Tuition Waived, Study Abroad Non Pitt Programs, Dissertation Students & Withdraws & Other Tuition Headcount. If you enter data in these columns, the "Adjusted Headcount" will reflect the net enrollment.

Enrollment - (Tuition Waived, Study Abroad Non Pitt Programs, Dissertation Students & Withdraws & Other Tuition Headcount) = Adjusted Headcount

- 3. Click the Save button, this will automatically calculate FTE, Adjusted Headcount and Tuition Revenue fields. Fields in gray are not editable.
 - Adjustments can be made to saved enrollment and credit hours, remember to save the changes.

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		/_Scenario School udget School of	Progra Nursing Standa	m Tuition A ard Rate No Budg						/	Data Ad hoc For
			FTE	Enrollment	 Adjusted Headcount 	Credit Hours	\$Rate	\$ Tuition Revenue	\$ Extra Credit Tuition	\$ Withdraws & Other Tuition	\$ Total Tuition Revenue
In-State	Full-Time	Freshman					11726				
		Sophomore		-			11726				
		Junior					11726				
		Senior					11726				
	Part-Time	Freshman					977				
		Sophomore					977				
		Junior					977				
		Senior					977				
Out-of-State	Full-Time	Freshman					20754				
		Sophomore					20754				
		Junior					20754				
		Senior					20754				
	Part-Time	Freshman					1729				
		Sophomore					1729				
		Junior					1729				
		Senior					1729				
nternational	Full-Time	Freshman					20754				
		Sophomore					20754				
		Junior	4				2075/	_			

• Be sure to enter both Enrollment and Credit Hours for part-time students.

Graduate & Professional Practice Forms

- 1. The Graduate and Professional Practice forms are similar to Undergraduate, with ALL terms included on one spreadsheet. The same procedures apply to these forms.
- 2. Enter Enrollment and Credit Hours for every category of student (note the new requirement for international residency).
- Click the "+" icon next to Adjusted Headcount, to open the columns to enter Tuition Waived, Study Abroad Non Pitt Programs, Dissertation Students & Withdraws & Other Tuition Headcount. If you enter data in these columns, after you choose "Save", the "Adjusted Headcount" will reflect the net enrollment.

Enrollment - (Tuition Waived, Study Abroad Non Pitt Programs, Dissertation Students & Withdraws & Other Tuition Headcount) = Adjusted Headcount

- 4. Click the Save button, this will automatically calculate FTE, Adjusted Headcount and Tuition Revenue fields. Fields in gray are not editable.
 - Adjustments can be made to saved enrollment and credit hours, remember to save the changes.
 - Be sure to enter both Enrollment and Credit Hours for part-time students.
- 5. When you have completed entering data for your school you can change to a new Program by using the pencil icon on the right. This will display the prompt window and allow you to select the new program (online, Study Abroad, etc.)

GR - All T	erms by S	chool 0							100 to	Action	w Save Ref	wish Close
Years 0 2022 0	Career Level UV Graduate Duc	Scenario School o	Progra FNursing Stand	m Tution A and Rate No Budg	ttribute eted Attribute				-	- 7	O Data Ad	ios Porma
			FTE	Enrolment	^{IE} Adjusted Headcount	Credit Hours	SRate	\$ Tuition Revenue	\$ Extra Credit Tuition	5 Students Billed at Other Rate Tution	\$ Total Tution Revenue	
Fail Term	In-State	Full-Time		1			13795					
		Part-Time					1122					
	Out of State	Ful-Time					16474					
		Part-Time					5348					
	International	Full-Time					16474					
		Part-Time					1345					
Spring Term	In-State	Full-Time					13795					_
		Part-Time					1122					
	Out-of-State	Full-Time					16474					
		Part-Time					1345					
	International	Full-Time					16474					
		Part-Time					5345					
Summer Term	In-State	Full-Tinte					1122					
		Part-Time					1122					
	Out-of-State	Fu8-Time					1346					
		Part-Time					5348					
	International	Full-Time					1345					
		Part-Terret					1345					

Enrollment Data

- 6. Use the drop down arrows to choose the School, Program and Tuition Attribute for entry.
 - If you do not have a specific Tuition Attribute you will need to choose No Budgeted Attribute.
 - Full Time Dissertation, Study Abroad are entered on a separate spreadsheet unlike in previous budgeting procedures.
- 7. After you have chosen the School, Program and Tuition Attribute, click the Apply button.

	Apply Clear	Cancel
UV_Scenario: Bud	get	
School	School of Nursing	~ 4
Program	Standard Rate	~ 4
Tuition Attribute	Select Member	R.
_	Standard Rate	
	Nurse Anesthesia	

	Apply Clear	Cancel	ts
UV_Scenario: Bud	<u>get</u>		he on
School	School of Nursing	~ 2	ł
Program	Standard Rate	~ 4	ł
Tuition Attribute	No Budgeted Attribute	~ 4	ľ
	Select Member		a
	No Budgeted Attribute		
	Online Program		
	Full Time Dissertation		
	Study Abroad		

Joint Degree Forms

- 1. The Joint Degree forms are similar to Undergraduate and Graduate/Professional Practice, with ALL terms included on one spreadsheet. The same procedures apply to these forms.
- 2. If your school has a Joint Degree you will have access to enter the enrollment data on this form, only the school responsible for submitting enrollment projections for the joint degree will enter data on this form.

	Career Level Graduate	UV_Scenario Budget	Tuition Attribute MHA/MBA Joint Program	n						/	Data Ad	hoc F <u>o</u> rm
			FTE	Enrollment	 	Credit Hours	\$Rate	\$ Tuition Revenue	\$ Extra Credit Tuition	\$ Students Billed at Other Rate Tuition	\$ Total Tuition Revenue	
Fall Term	In-State	Full-Tin	ne				14350					
		Part-Tir	me				1103					
	Out-of-State	te Full-Tin	ne				22322					
		Part-Tir	me				1715					
		al Full-Tin	ne				22322					
		Part-Tir	me				1715					
Spring Term	In-State	Full-Tin	ne				14350					
		Part-Tir	me				1103					
	Out-of-Star	te Full-Tin	ne				22322					
		Part-Tir	me				1715					
	Internation	al Full-Tin	ne				22322					
		Part-Tir	me				1715					
Summer Term	In-State	Full-Tin	ne				1103					
		Part-Tir	me				1103					
	Out-of-Star	te Full-Tin	ne				1715					
		Part-Tir	me				1715					
	Internation	al Full-Tin	ne				1715					
		Part-Tir	me				1715					

Enrollment Data

Export to Excel

- 1. Select Actions Spreadsheet Export, to send the form data to Excel.
- 2. The Spreadsheet Export window will open, select Export.



- 3. This will open a dialog box to open the HspWbGrid.xls file.
 - Chose the Open with Microsoft Excel option or Save File.
 - Depending on your version of Excel, you may receive a warning message regarding the format and extension, select Yes to open the file.
 - Use this spreadsheet to total your enrollment and revenue and verify your data is correct.

			l									
	А	В	С	D	E	F	G	н	1	J	К	
1				Dietrich Sch Arts and Sciences	Standard Rate	No Budgeted Attribute	Jul	2022	Budget	Working	Graduate	
2			¢									
3				FTE	Enrollment	Students Billed at Other Rates	Tuition Waived	Study_Abroad_Non_Pitt_Programs	Adjusted Headcount	Credit Hours	\$Rate	\$ Tu
4	Fall Term	In-State	Full-Time									
	Fall Term	In-State	Part-Time									
	Fall Term	Out-of-State										
-	Fall Term	Out-of-State										
	Fall Term	International										
	Fall Term	International										
	Spring Term		Full-Time									
	Spring Term	In-State	Part-Time									
		Out-of-State										
		Out-of-State										<u> </u>
	Spring Term	International										<u> </u>
		International										
	Summer Term		Full-Time									
	Summer Term		Part-Time									—
	Summer Term											
	Summer Term											<u> </u>
	Summer Term											
	Summer Term	International	Part-Time									
22												(

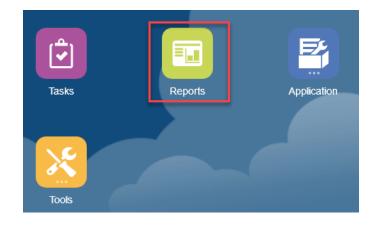
Reports

The following reports are available.

- Fa11 2020 Actual Tuition vs. Prior Year
- Fa11 2020 Tuition Budget vs. Actual
- FY22 Printable Book Tuition

Running Reports

1. From the home page, select the Reports task.



2. Select the Action icon to run the report. Reports can be run in HTML, PDF and XLS formats.

Reports		<u>R</u> efresh	
Show POV Options 🖌			
Name	Description	Actions	
A Home			_
Fall of 2020 Actual Tuition vs. Prior Year		HTHL PDT	×LS
Fall of 2020 Tuition Budget vs. Actual		HTRL PDF	
FY22 Printable Book Tuition		HTRL FD7	×LS #

Information & Training

A training video will be recorded and available on demand by Friday, December 18th at:

https://prism.pitt.edu/applications/planning-and-budgeting-cloud-service-pbcs/

Two live PBCS demonstrations will be offered in January 2021; users will receive email on dates once determined.

Additional information on official communications and overviews of the process may be found on the University Budget Formulation Process SharePoint website: <u>https://pitt.sharepoint.com/sites/cfo</u>

For questions on the enrollment data entry, please email:

- Donna Zacher <u>dzacher@cfo.pitt.edu</u>
- Kevin Flaherty <u>kflaherty@cfo.pitt.edu</u>