University of Pittsburgh

FY 2022

Enrollment and Tuition Revenue Budget Process

User Guide

Tables of Contents

Navigation

Initial Access

To gain access to PBCS, please complete the PRISM User Access Information Form found on the PRISM website at https://prism.pitt.edu/access/. *[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 oraclecloudadmin_ww@oracle.com 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.
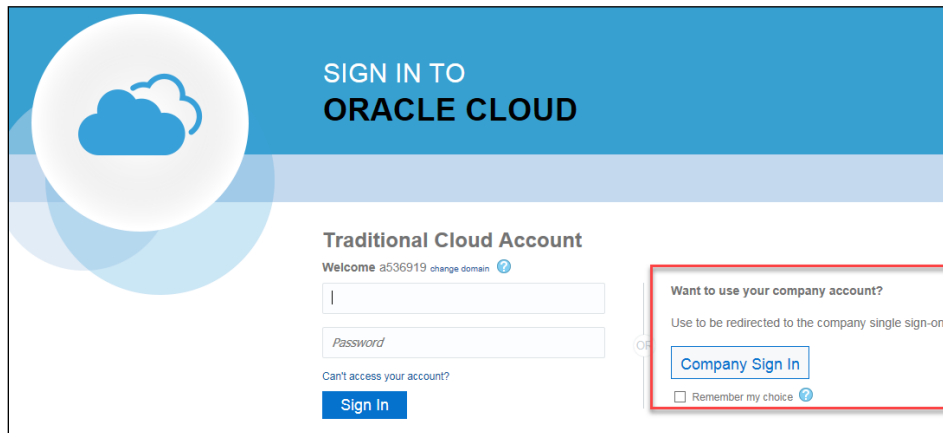
NOTE: If using the link from the Oracle Cloud email, you will be directed to the My Cloud Home page. From there, click the *planning2* service, and you will see the above screen.

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.

Navigation

PBCS Home Page
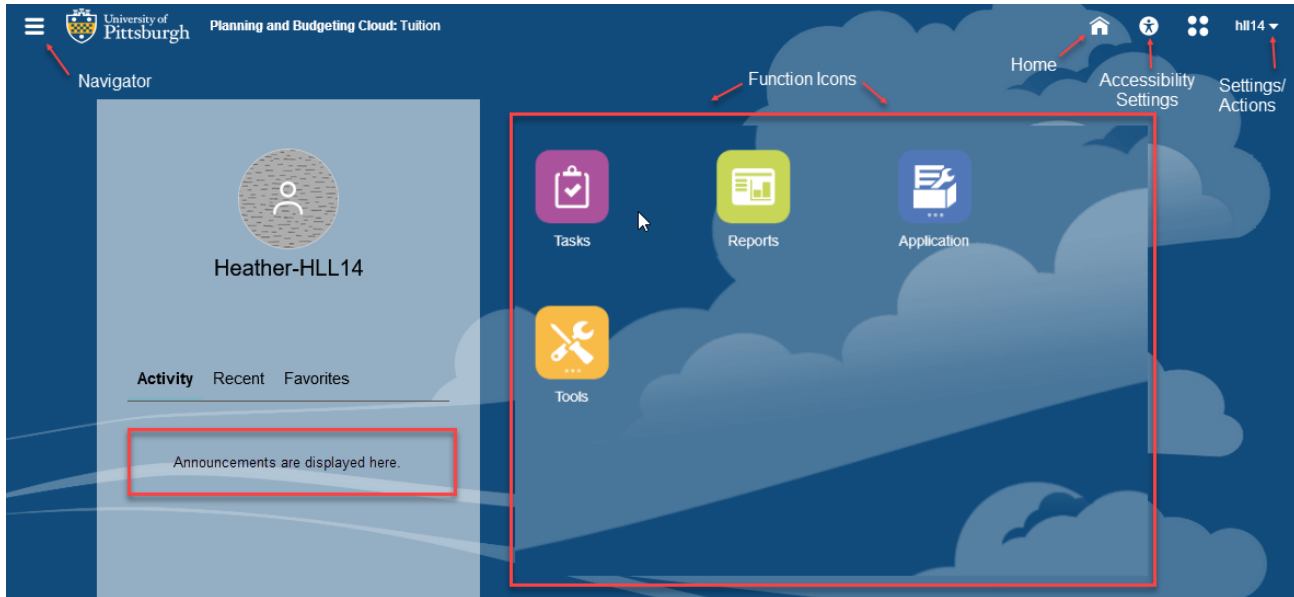
- **Navigator** - Use the Navigator menu to access functions, applications settings and preferences. Under the Preferences link, you can manage several personal preferences such as email options, display options and printing options. For example, in display options you can change the number formatting 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 Oracle-provided 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.

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.
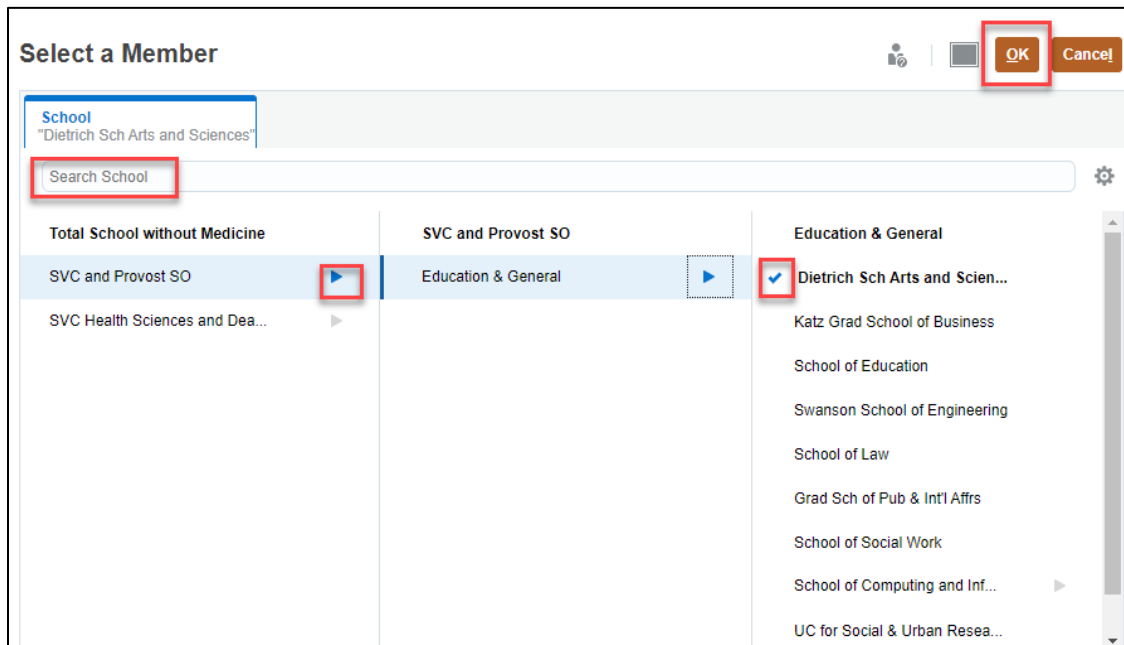
Entering Report and Form Parameters

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.
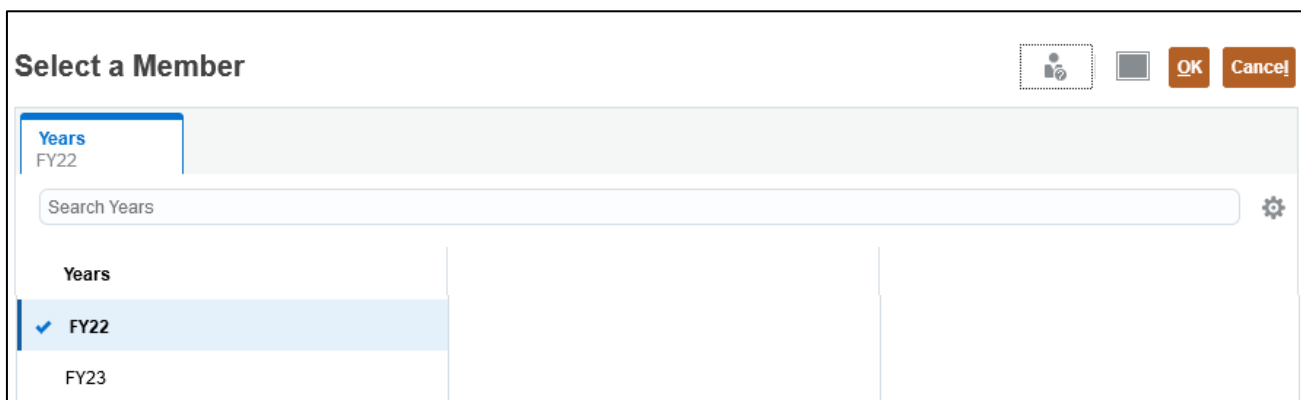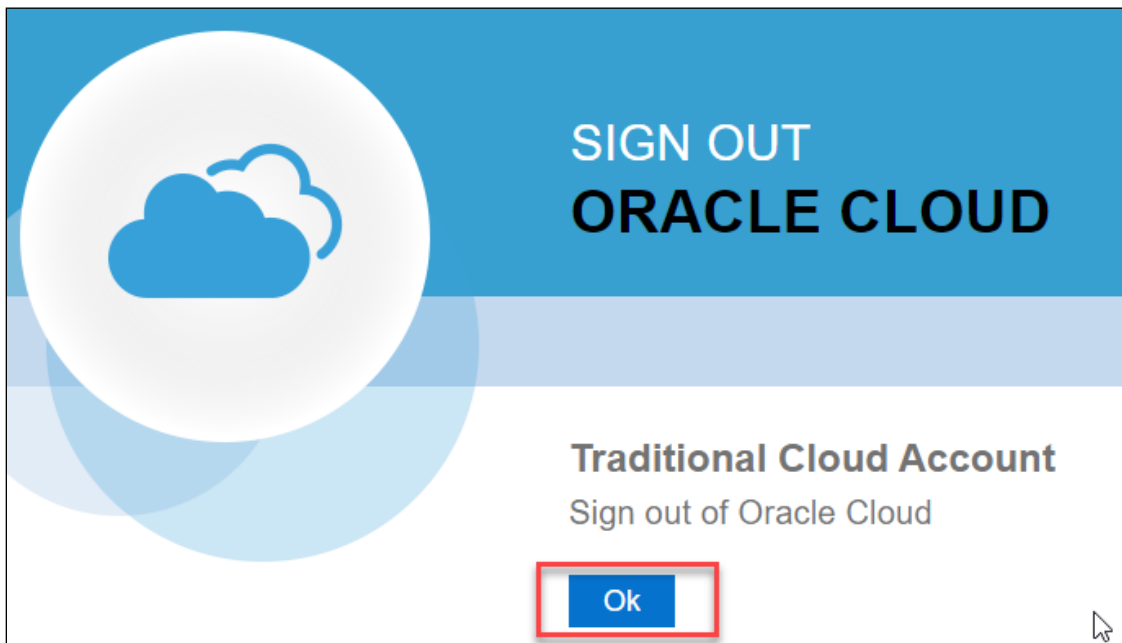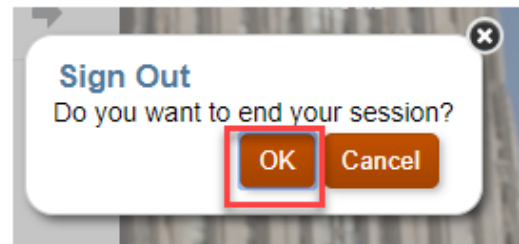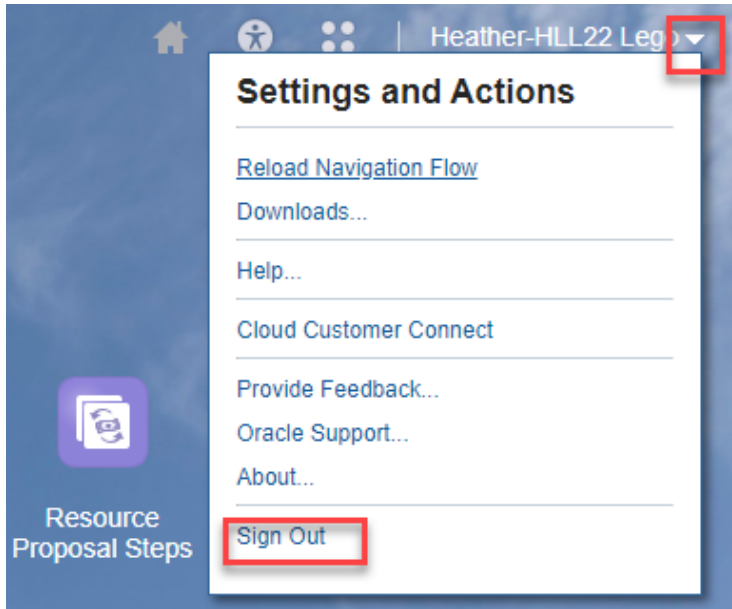
Navigation

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.
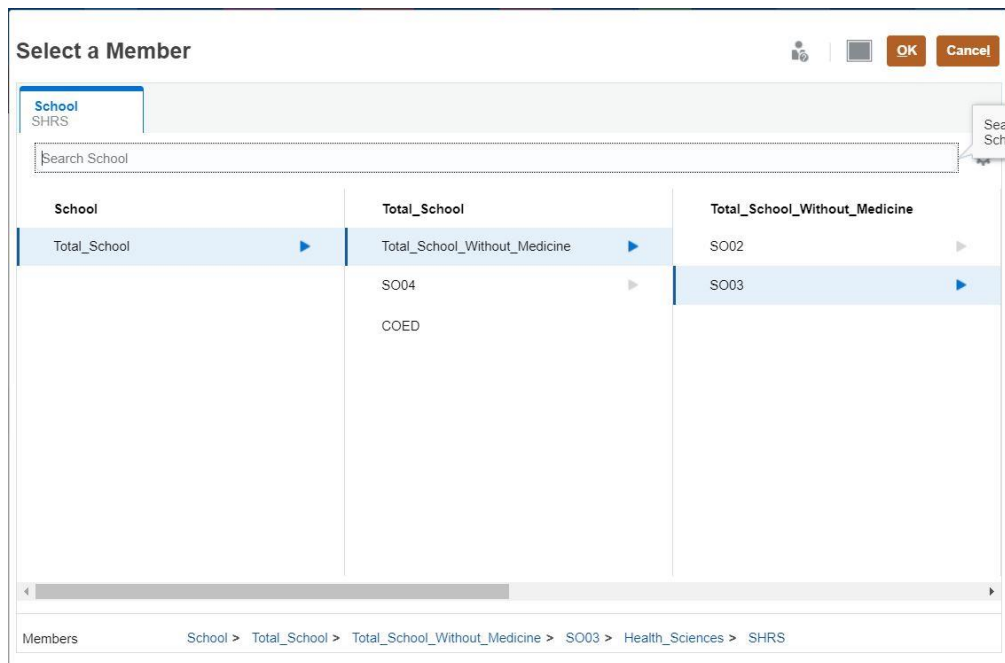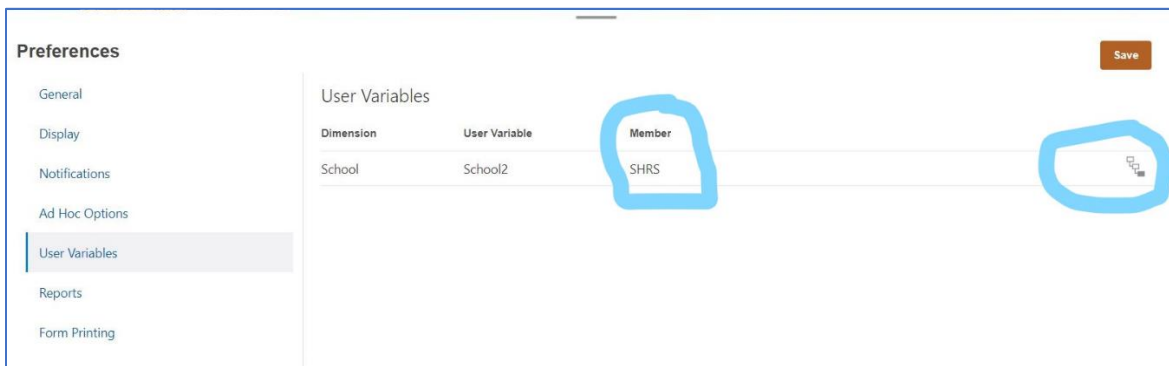
User Preferences

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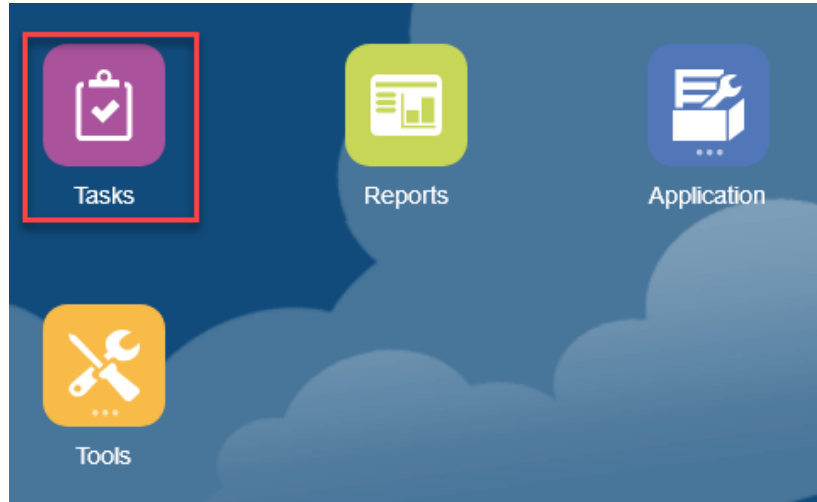
1. Click the Tools icon.

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.
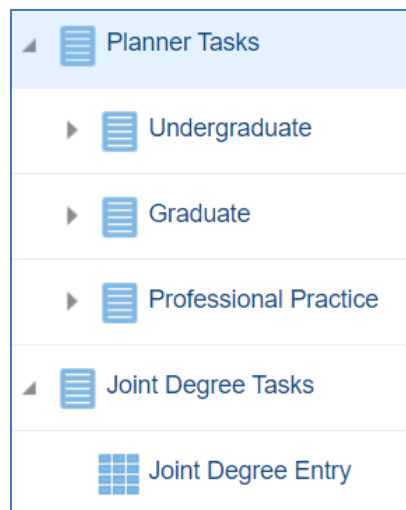
Enrollment Data

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.

Enrollment Data

Undergraduate Form

1. Enter Enrollment and Credit Hours for every category of student (freshmen, sophomore, etc.; note the new requirement for international residency).

2. 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.

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

Enrollment Data

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).

3. 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.)

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.

Enrollment Data

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.

Joint Degree Entry			FTE	Enrollment	⊞ Adjusted Headcount	Credit Hours	$Rate	$ Tuition Revenue	$ Extra Credit Tuition	$ Students Billed at Other Rate Tuition	$ Total Tuition Revenue	
Fall Term	In-State	Full-Time					14350					
		Part-Time					1103					
	Out-of-State	Full-Time					22322					
		Part-Time					1715					
	International	Full-Time					22322					
		Part-Time					1715					
Spring Term	In-State	Full-Time					14350					
		Part-Time					1103					
	Out-of-State	Full-Time					22322					
		Part-Time					1715					
	International	Full-Time					22322					
		Part-Time					1715					
Summer Term	In-State	Full-Time					1103					
		Part-Time					1103					
	Out-of-State	Full-Time					1715					
		Part-Time					1715					
	International	Full-Time					1715					
		Part-Time					1715					

Years 2022 · Career Level Graduate · UV_Scenario Budget · Tuition Attribute MHA/MBA Joint Program

Save · Refresh · Actions ▼ · Complete · Previous · Next · Close · Data · Ad hoc · Format

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.
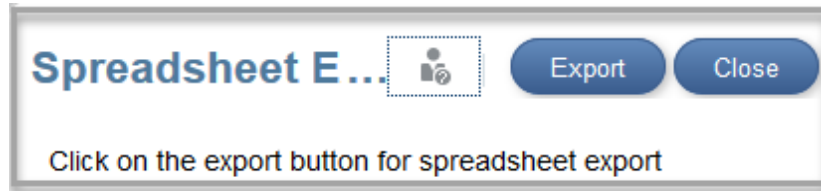
3. This will open a dialog box to open the HspWbGrid.xls file.

    - 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.

|	A	B	C	D	E	F	G	H	I	J	K
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								
5	Fall Term	In-State	Part-Time								
6	Fall Term	Out-of-State	Full-Time								
7	Fall Term	Out-of-State	Part-Time								
8	Fall Term	International	Full-Time								
9	Fall Term	International	Part-Time								
10	Spring Term	In-State	Full-Time								
11	Spring Term	In-State	Part-Time								
12	Spring Term	Out-of-State	Full-Time								
13	Spring Term	Out-of-State	Part-Time								
14	Spring Term	International	Full-Time								
15	Spring Term	International	Part-Time								
16	Summer Term	In-State	Full-Time								
17	Summer Term	In-State	Part-Time								
18	Summer Term	Out-of-State	Full-Time								
19	Summer Term	Out-of-State	Part-Time								
20	Summer Term	International	Full-Time								
21	Summer Term	International	Part-Time								
22											

Reports

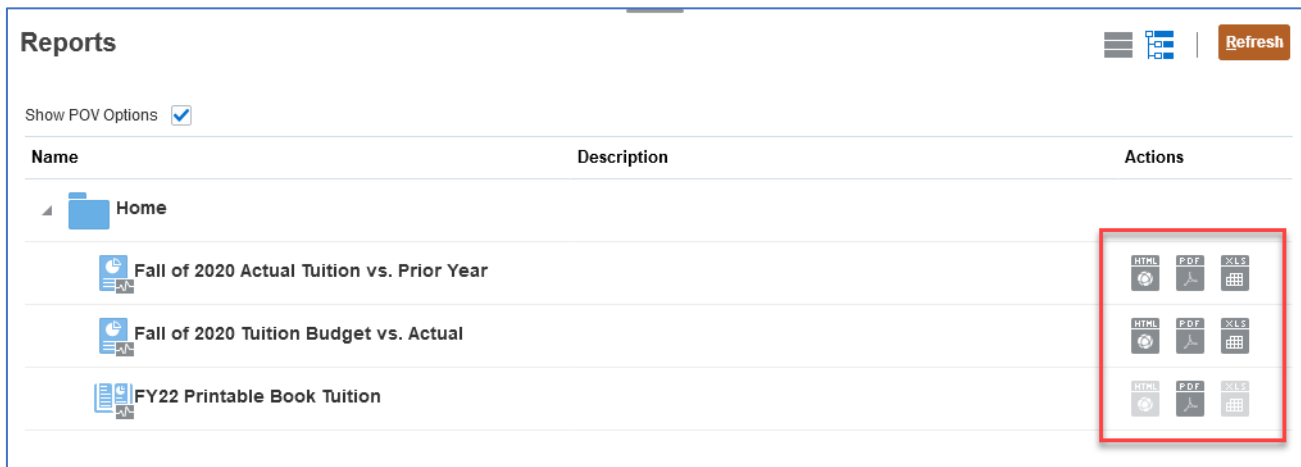The following reports are available.

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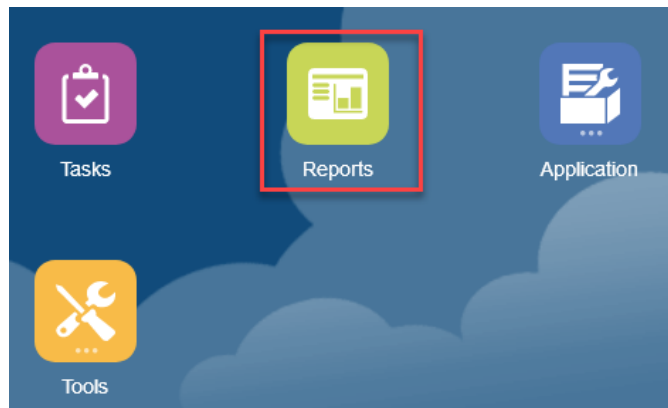
2. Select the Action icon to run the report. Reports can be run in HTML, PDF and XLS formats.

Information & Training

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

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: https://pitt.sharepoint.com/sites/cfo

For questions on the enrollment data entry, please email:

- Donna Zacher dzacher@cfo.pitt.edu
- Kevin Flaherty kflaherty@cfo.pitt.edu