BPS – Budget Planning System

2019/20 Budget Process Dates & System Enhancements

System Go-Live & Budget Due Dates

Since most BPS users don’t begin the budgeting process until after staff salaries are available, system go-live will be postponed until staff salary information has been uploaded into BPS. The budget due date will also be pushed out to give users the same amount of time to complete their budgets.

<table>
<thead>
<tr>
<th>Day/Date</th>
<th>System Go-Live Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thursday, 06/27</td>
<td>BPS go-live, with salary &amp; non-salary information included</td>
</tr>
<tr>
<td>Monday, 07/22</td>
<td>Balanced budgets due to Finance liaisons</td>
</tr>
</tbody>
</table>

Refresher Training

Refresher training sessions are optional and provide a high level review of the entire BPS system, the system’s new user interface and new functionality enhancements (see Enhancements section below). Three group training sessions are scheduled and each one will cover the same topics. To simplify adding a session to your calendar, Finance will send calendar invites for all three sessions. Please accept the session you will attend and decline the other two.

Open labs will immediately follow each training session, allowing BPS users to begin developing budgets and use the training they just received.

<table>
<thead>
<tr>
<th>Day/Date</th>
<th>Training Session Time</th>
<th>Open Lab Time</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wednesday, 06/26</td>
<td>2:00 – 4:00</td>
<td>Immediately following</td>
<td>Building 1 Conference Room</td>
</tr>
<tr>
<td>Thursday, 06/27</td>
<td>9:00 – 11:00</td>
<td></td>
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</tr>
<tr>
<td>Tuesday, 07/02</td>
<td>10:30 – 12:30</td>
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Additional Budget Process Support

Open Lab

An additional open lab will be held on Tuesday, 07/09 from 1:00 – 5:00pm in the second floor Finance suite conference area in Building 1.

Please remember to bring your cell phone for two-step authentication along with your laptop computer. If you don’t have a laptop, please let your Finance liaison know and we will provide a loaner.
**One-on-One Sessions with Finance Liaisons**

Please schedule these sessions directly with your Finance liaison. Because of the large number of budget units, please schedule your session early in the budgeting process whenever possible.

**Help with Salary Questions**

Staff salary-setting is managed by Human Resources. Questions about staff salary rates should be directed to your Human Resources manager.

Salary-setting for Academic Staff-Teaching and Other Teaching Staff is managed by Faculty Affairs. Questions about lecturer salary rates should be directed to Connor Crutcher.

**BPS System Enhancements for 2019/20**

Several enhancements have been made to the BPS system for the upcoming budget cycle. Since these are fairly straightforward, they are described below, but will also be reviewed in refresher training sessions.

**VPN Required for Remote Access**

VPN is required if the BPS system is accessed remotely on a non-Stanford network.

**New Software Platform, New User Interface**

The BPS system has been moved to the most current Axiom software platform. This change increases system stability and will make future system enhancements more readily available. The user interface has a different look, but the module structure and system functionality remain largely unchanged. A Job Aid will be made available in training and in the system that will highlight how to use the new interface. We’ll also review changes during training sessions and your Finance liaison can also help with any functionality questions.

**Budgeting for SGF & SIGF Awards**

Beginning in 2019/20 SGF & SIGF awards will be accounted for on VPGE’s books and no longer included in a department’s operating budget. These operating budget PTAs have been inactivated in BPS. Additional details are included in Dan King’s 04/16/19 email to the GFPS Users list.

**Planned Uses in GFPS**

Amounts transferred as operating budget support in the GFPS Macro Budget module will once again be brought into the BPS Budget Summary page as a reference column (“Planned Use in GFPS”). Amounts that have been stewarded in GFPS will now also be prepopulated in that PTA’s column in the BPS Budget Summary matrix.