Festivus for the Rest of Us

Full-stack campus budget submission solutions for all

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Pressure and Time

Before COVID-19

- Could not find time to tackle new projects or ideas – tied up in endless to-do lists

During COVID-19

- Still short on time, but more on my to-do lists
- Also:
    - Tighter budgets
    - IT team stretched to limits
    - Limited campus bandwidth for new solutions

"Invention, it must be humbly admitted, does not consist in creating out of void but out of chaos."

-Mary Shelley, Author of Frankenstein

Key Takeaway from SAIL CBO

- Strengths Finder results – Learner, Ideation, Achiever, Intellection, Restorative

- I felt empowered to take a risk and do something I have never done, and I was given the time to try it

What problem am I trying to solve?

Item #	Account	Budget Item Description	Spending Category	Type of Expenditure	Recurring	One-time	Total	Justification
1	86060100	Administration	4 - Managerial / Operati	Supplies	$ 1,200.00		$ 1,200.00	Used for supplies for Facilities operations
2		Code Training	1 - Health and Safety	Membership	$ 225.00		$ 225.00	Code Training to keep certification for two
3	87090100	Administration	4 - Managerial / Operational		$ 2,000.00		$ 2,000.00	Used for supplies for Facilities operations
4							$ -	
5	86061500	Building Maintenance	1 - Health and Safety	Supplies	$ 6,000.00		$ 6,000.00	These accounts pay for Campus Pest Control
6								
7	87091500	Building Maintenance	1 - Health and Safety	Supplies	$ 4,000.00		$ 4,000.00	These accounts pay for Campus Pest Control
8							$ -	
9	86062001		1 - Health and Safety	Maintenance	$ 7,000.00		$ 7,000.00	Elevator contract
10	86062002	HVAC/Electrical Plum	1 - Health and Safety	Supplies	$ 8,000.00		$ 8,000.00	These accounts includes monthly water trea

Item #	Account	Budget Item Description	Spending Category	Type of Expenditure	Recurring	One-time	Total	
1	86040500	Student Assistants	4 - Managerial / Operati	Part-time Payroll - Stude	yes		$ 6,939.00	Student Assist
2	86040500	Night Supervisor - TS	4 - Managerial / Operati	Part-time Payroll - Non-Ir	Yes		$ 8,951.00	Evening mana
3	91044901	Library fees & fines	5 - Revenue Generating	Maintenance	Yes		$ 500.00	Replacement
4	86040500	PPE - face shields	1 - Health and Safety	Supplies	No		$ 60.00	Purchased thro
5	86040500	PPE - non-latex gloves	1 - Health and Safety	Supplies	No		$ 60.00	estimate for 3
6	86040500	Springshare/LibGuide E-Reserves	2 - Instruction	Software	Yes		$ 1,999.00	This software
7	86040500	Compendium Library Services (Desk Traci	4 - Managerial / Operati	Software	Yes		$ 795.00	This software
8	86040500	De Lage Landen Public Finance Book Sca	3 - Student Facing Expe	Equipment	Yes		$ 732.00	6 months of so
9	86040500	CCP Solutions, LLC (Scanner service agre	4 - Managerial / Operati	Maintenance	Yes		$ 670.00	Yearly service

I need a simple, accurate way to compile budget submissions during the year.
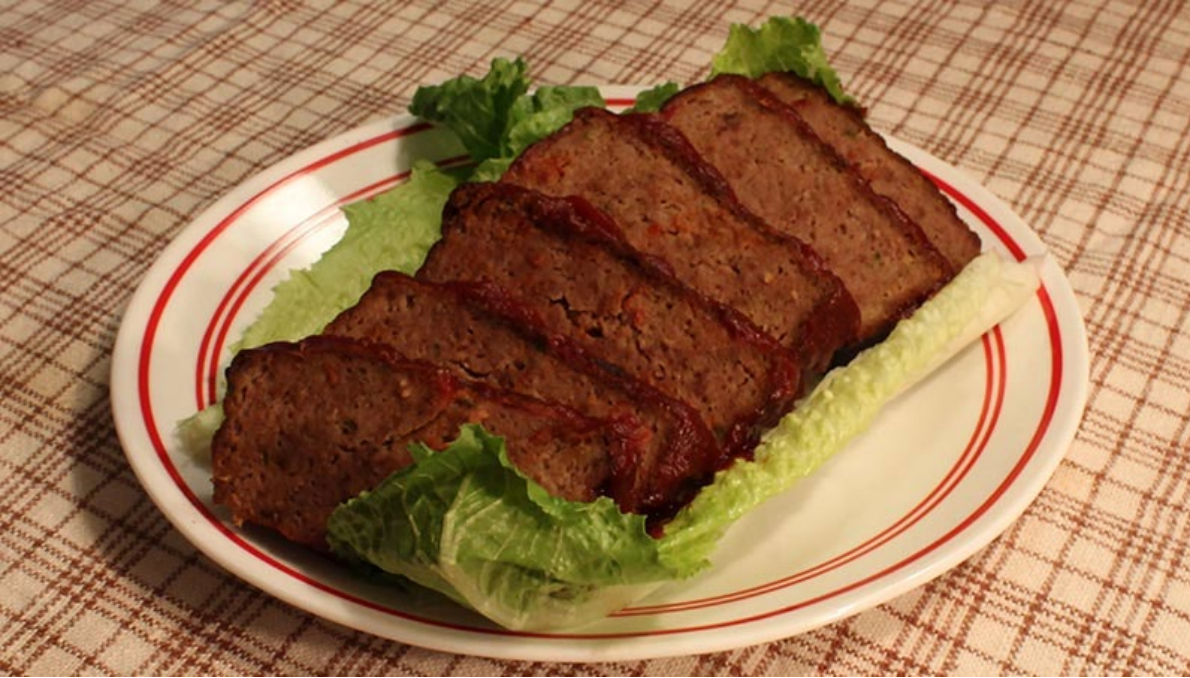
The Meat Course: Exploring solutions

- Met with our Director of Instructional Design and Online Learning and members of our IT staff (including CIO) to explore possible tools
- Asked questions of the SUNY Budget Office and Form 1 compilation
- Toured budget software utilized at SUNY Plattsburgh
- Researched web solutions

SOLUTION #1 –
CRUD

Web CRUD using PHP and MySQL

Spring 2021 Budget Details

Add New Budget Item

#	Account	Item Description	Spending Category	Expenditure Type	Timing	Amount	Justification	Area(s) to Notify	
26	90084002	Student employees	Student Facing Experience	Part-time Payroll - Students	Recurring	30000	Need them!!!!!	N/A	👁 ✏ 🗑

Create New Budget Item

Please fill this form and submit to add budget item to the database.

Department

Please select Unit ▼

Account Number

Please choose Unit above ▼

Item Description

Spending Category

Please select spending category ▼

Expenditure Type

Please select expenditure type ▼

Timing:
○ One-Time
○ Recurring

✔ Showing rows 0 - 0 (1 total, Query took 0.0200 seconds.)

```
SELECT * FROM `budget2`
```

☐ Profiling [Edit inline] [Edit] [Explain SQL] [Create PH

☐ Show all | Number of rows: 25 ▼ Filter rows: Search this table

+ Options

	id	account	budget_item	spending_category	exp_type	timing	amount	justification	area_notify	unit
☐ ✏ Edit 📋 Copy ⊖ Delete	26	90084002	Student employees	Student Facing Experience	Part-time Payroll - Students	Recurring	30000	Need them!!!!!	N/A	comput

☐ Check all With selected: ✏ Edit 📋 Copy ⊖ Delete 📄 Export

SOLUTION #2 – EXCEL AND ACCESS

Amazing side-effects

- I can now use the same Excel to Access functionality to:
  - Import PSR by line reports from BI
  - Compile Excel reports from Interview Exchange
  - Continue to use this process for larger units who don't want the CRUD functionality
  - Merge selected Assessment and Budget data into one collection system

  - And that's not all…

Would you believe this is Excel?