



First Fridays with the Budget Office

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UNIVERSITY
OF NORTH TEXAS[®]

February 2, 2018

EST. 1890

AGENDA

- **Financial Transformation: Continuing the Conversation**
Special Guest President Smatresk
- **General Announcements**
- **Budget Stars**
- **Monthly Trainings**

Financial Transformation: Continuing the Conversation

Special Guest - President Neal Smatresk

General Announcements

- **NEW PI Dashboard for Sponsored Projects**

A PI Dashboard has been created within PeopleSoft itself that provides summary and detailed information for active grants summarized on the same screen without having to use a separate sign-on or navigate over to COGNOS.

General Announcements

- **NEW PI Dashboard for Sponsored Projects (continued)**

Active awards by PI will first be listed in high-level summary format, with drill-down ability to quickly see underlying details.

Roll-out begins March 1st. More info to follow.

General Announcements

- **New Training Materials “Cheat Sheets”** one page quick reference materials are now available for:
 - Budget Basics: [Chart of Accounts](#), [Budget 101](#), [ABAs](#), [IDTs](#), & [Salary Info](#)
 - Other Training: [Function Field](#), [Cognos Reports](#), [Project Budgets](#) , [Cash Handling](#)

Budget Stars

The Budget Office is proud to recognize staff members who completed the core Budget Bundle training courses in 2017:

- Budget Basics
- Function Field
- Budget Reconciler
- Cognos – Departmental & Faculty Projects

Budget Stars

Ruben Alvarado

Tom Augsberger

Sian Brannon

Mary Chandler

Budget Stars

Melanie Dewey

Lori Duvall

Nancy Ellis

Brandy Gunels Johnson

Budget Stars

Katie Herring

Joanna Hussey

Sharon James

Glenn Mayo

Budget Stars

Gayle Rogers

Debbi Stack

Ellan Whatley

Susan Wood

Monthly Trainings

- **Budget Basics**

Learn the fundamentals of the Chart of Accounts including chartfields, chartstring formation, and the differences between budgetary and non-budgetary chartstrings. Participants will learn the proper uses of the ABA, IDT, Chartfield Setup/Change forms, HRM-4s, ePars, and Salary Savings.

Wednesday, February 7th from 1:00PM – 4:00PM in
WH117

Monthly Trainings

- **Cash Handling**

This required annual course is for all UNT employees who handle cash. Participants will gain a functional understanding of UNT's policies and the controls designed to safeguard cash.

Thursday, February 8th from 2:00PM – 3:00PM in
WH117

Monthly Trainings

- **Function Field**

This course will familiarize participants with the Function Mapping for UNT Guide, a set of guidelines that identifies the appropriate function by chartstring and account.

Wednesday, February 14th from 2:00PM – 4:00PM
in WH214

Monthly Trainings

- **Cognos – Departmental Budgets**

Users will learn how to interpret departmental reports, view balances, and locate transactions.

Thursday, February 15th from 9:00AM – 11:00AM in
GAB550A

Monthly Trainings

- **Open Lab with the Budget Office**

Your opportunity to receive one-on-one assistance in all budget related areas including how to cover deficit lines, submit ePars and ABAs, and how to manage your budgets! Come and go.

Friday, February 16th from 9:00AM – 11:00AM in
GAB550A

Monthly Trainings

- **Cognos – Faculty Project Budgets**

Users will learn how to read NFCAP project ID reports at a high-level to view balances, and how to read reports at a granular level by drilling-down to view account balances and locate transactions.

Wednesday, February 22nd from 9:00AM – 11:00AM in GAB550A

Ongoing Support

[Budget Website](#)

- [Whom to Contact](#)
 - Support>Whom To Contact
 - List of departmental contacts by issue (IDTs, ABAs, ePros, ePars, etc.)
- [Announcements](#)
 - Find out any new information you should be aware of that could affect your budget
- [Training Materials](#)
 - Training > Training Materials
 - List of all training documents
- [Documents](#)
 - Resources > Documents
 - List of Budget Management Help Documents



**Thank
You.**

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