



05.25.2023

## New Budget Employee – Where to Start

1. Banner Self-Service (SSB) – Request “BAN\_COFC\_F\_GENERAL\_REPORTS” access from the [SSB Authorization form](#) on the Controller’s website.
2. Internet Native Banner (INB) – Request “BAN\_COFC\_F\_REQUIRED\_BUDGET\_ADJ” access from the [SSB Authorization form](#) on the Controller’s website.
3. Request access to each required Index via the [Index/FOP Access form](#) on the Controller’s website. A new Index/FOP Access form will need to be signed by **ALL** employees who require access to the Index.
4. Collaborate with department leadership on whether access to Human Resources/Payroll Security is required.
5. Review the Budget and Finance Training Course on CougarEd (Reached via [MyPortal](#))
  - Navigate to the “Catalog”
  - Click the Budget and Finance Folder
  - Register for the Budget and Finance Training Course
    - a. Budget 101
    - b. MyPortal Account Query
    - c. MyPortal Org Hierarchy
    - d. MyPortal Encumbrance Query
    - e. Cognos Finance
    - f. Budget 201
    - g. Personnel 101
6. Review budget guides on the [Finance Training tab](#) on the Budgeting & Payroll website.
  - a. Budget Best Practices
  - b. How to Access Banner SSB
  - c. How to Access Banner INB
  - d. How to Access ePrint
  - e. Banner Finance Quick Reference Guide
  - f. Banner INB Keyboard Shortcuts
  - g. Common Budget Transfer Account Number
  - h. List of Available reports in Cognos
  - i. How to Access Cognos Finance
  - j. How to Access Excel Labor Reports
  - k. How to Fund Personnel Items
  - l. Quick Review for NSF
7. Request “finance” access to Cognos via a [Cognos/Tableau Data Access Request](#).
8. Subscribe to the Budgeting & Payroll Services Yammer Group – <http://yammer.com/office365>
9. Email [budget@cofc.edu](mailto:budget@cofc.edu) for day-to-day questions.

### Other notes

1. [Treasurer’s Office](#) – Check & cash deposits
2. [Procurement and Supply Services](#) – Purchase orders, eProcure, Procurement card
3. [Controller’s Office/Accounts Payable](#) – Expenditure authorizations, Travel authorizations, Invoice payments, Fund balances, Grant Administration, Activity accounting
4. [Human Resources](#) – Benefits, Leave, Personnel forms, Direct deposit
5. [Payroll](#) – Timesheets, Leave reports, W2s