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

   - 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.
9. Email 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