New Budget Employee – Where to Start

1. Banner Self-Service (SSB) – Request “BAN_COFC_FGENERAL_REPORTS” access from the SSB Authorization form on the Controller’s website.

2. Internet Native Banner (INB) – “Request BAN_COFC_FREQUATED_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. Review budget training videos on MyCharleston – Help & Training and/or CougarEd.
   a. Budget 101
   b. Budget 201
   c. Personnel 101
   d. Budget Transfer
   e. Cognos
   f. MyPortal Org Hierarchy
   g. MyPortal Encumbrance Query
   h. ePrint Open PO
   i. MyPortal Account Query
   j. Banner SSB Account Query

5. 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

6. Request “finance” access to Cognos via a Cognos/Tableau Data Access Request.

7. Subscribe to the Budgeting & Payroll Services Yammer Group.

8. As needed, register for Budget Office Open Lab training, offered twice a month, to ask specific in-depth questions to the Budget team.

9. Email budget@cofc.edu for day-to-day questions.

Other notes

1. Treasurer’s Office – Check/revenue deposits
2. Procurement and Supply Services – Purchase orders, eProcure, Procurement card
3. Controller’s Office – Expenditure authorizations, Travel authorizations, Invoice payments
4. Human Resources – Benefits, Leave, Personnel forms, Payroll earnings direct deposit
5. Payroll – Timesheets, Leave reports, W2s