



Welcome to Focus on Finance!

February 18, 2016

Agenda

- **WorkForUM Faculty Retitle Action – Danny Linton**
- **Banner Security Access – Kim Josh**
- **Spring Budget Timeline/Key Events – Susan Boyce**
- **What's New? What's Due?**
- **SRI Budget Model Update – Sherry Greene**

WorkforUM: Faculty Retitle Action

Danny Linton

Assistant Director, Human Resources

WorkforUM: Faculty Retitle Action

- Faculty positions in WorkforUM should be kept up-to-date as these positions change ranks due to promotions, retirements, advanced planning, etc.
- The “Retitle Position” action on the faculty side of the Position Management module should be used to keep your position titles accurate.
- Selecting the correct rank on a hiring proposal DOES NOT update the position itself.

WorkforUM: Faculty Retitle Action

- **Example:**

Professor Jane Doe is retiring. Your department will fill her position, but at the assistant/associate level instead of as a full professor.

You complete a Request to Fill on this position, and indicate an Advertised Title of “Assistant/Associate Professor” but leave the Banner Title of Professor alone.

WorkforUM: Faculty Retitle Action

- **Example (cont.):**

You hire Dan Smith as an Assistant Professor, and indicate his rank on the hiring proposal. This gives Dan the correct rank, but does NOT update the position itself.

How do you fix this?

WorkforUM: Faculty Retitle Action

- **Example (cont.):**

On the Position Management side, find the position and start a Retitle Request action.

You will provide the new position title/rank AND choose the correct corresponding PCLS code.

WorkforUM: Faculty Retitle Action

- **Other reasons to use the Retitle Request for Faculty:**
 - **One Chair has stepped down and a different faculty member is being made the replacement chair. (In this case, also notify HR so supervisory roles can be mass updated.)**

WorkforUM: Faculty Retitle Action

- **You have planned in advance to move positions around and know the new rank ahead of the search. In this cases, you may request to fill the position on the Retitle Request itself.**

WorkforUM: Faculty Retitle Action

DEMO

WorkforUM: Faculty Retitle Action

Questions?



You and Us

~~You or Us~~

**We can make this whole system
access puzzle work for everybody**

Together, we can do this

- **Communicate with the entire team**
- **Forms, Forms, Forms**
- **You, Us, Everybody**

Distributed Security

- Not a one stop shop to request access to Banner and other systems on campus
- Banner
 - Finance, Human Resources, Accounts Receivable, Student, Advancement, Financial Aid
- OnBase
- Reporting
- Buildings/Doors
- WorkforUM
- Tigerbuy

IT System Access Support

itsas@memphis.edu

- **Banner Finance, Human Resources, Accounts Receivable**
- **Administrative Users**
 - **Payroll, Accounting, Human Resources, Bursar, Procurement, Shared Services, Internal Audit**
- **Departmental Users**
 - **Department Heads, Business Officers, Office Staff**

FORMS

FORMS

FORMS

Requesting Access to Business and Finance Systems=Frustration?

- Where are the %^&*# forms?
 - <http://www.memphis.edu/bf/forms/tech.php>
- Banner Finance, Human Resources
- Tigerbuy
- WorkforUM
- OnBase (Matrix)
- Reporting
- Equipment Reps
- Building Access
 - Online request with link to form

Organization Code Requests

- New org codes
- Rename org codes
- Move org codes from one department to another
- What is the organization hierarchy?
 - Eprint report FGRORGH
 - University
 - Executive-President
 - Division—Provost
 - Dean—FCBE
 - School—Economics
 - PI—Julia Heath

YOU

US

EVERYBODY

Our Responsibilities

- Process the form ASAP (if not sooner) Right?
- Notify you when the request is completed
- Review forms for appropriate signatures and access levels
- Adjust access according to policies and best practices
 - [UM1303](#) Authorized Signatures
 - [UM1507](#) Procurement and Contract Services
 - [UM1337](#) Data Access

Your Responsibilities

- Complete the form—fill in all the blanks
- Send the requests to the entire team
itsas@memphis.edu
- Notify us when somebody leaves your department
- Signatures matter
- It's not that easy, but we tried
http://bf.memphis.edu/forms/tech/bf_access_request.htm. If you need a better explanation, please call. We totally understand.

Everybody's Responsibilities

- Personal Identifiable Information
 - [University's Red Flag Program](#)
 - Access to student, faculty, staff information
- Best Practices
 - Access to institutional financial data
 - Signatures on request forms
- Financial Responsibility Confirmation
- IT Security Awareness Training

IT Security Access Support Team

- Khandakar Islam
 - kmislam@memphis.edu
 - x4281
 - Banner, Reporting, OnBase, Fobs
- Melissa Ramage
 - mramage@memphis.edu
 - x3440
 - Campus Card System, Building Access
- Kim Josh
 - kjosh@memphis.edu
 - x2711

Questions?



Answers?



Spring Budget

Financial Planning

901.678.2117

budget@memphis.edu

Spring Budget – Key Dates

- **Revenue Projections ~ Due Friday, March 11, 2016**
 - Email with instructions will be sent out Friday March 4, 2016
 - Instructions for preparing revenue budget revisions can be found on the Financial Planning website under the Frequent Asked Questions tab
- **Capital/R&R/Facility Projects ~ Due Monday, April 4, 2016**
 - If a Summer project is planned, submit by Spring deadline
- **Expenditure & Position Paper Budget Revisions ~ Due Monday, April 4, 2016**
 - If a position needs to be transferred for Fall, submit the transfer BR before deadline
 - Remember: no base revisions will be entered between the deadline and the opening of FY17.
- **BD4 Online Budget Revisions ~ Due Friday, April 15, 2016**
 - Remember to align department budgets for the remainder of FY16
 - No functional changes after deadline

What are Functional Totals?

Budget & Expenditure totals in a specific range of program codes

Program Code Range	Function
2000-2499	Instruction
2500-2699	Research
3000-3499	Public Service
3500-3999	Academic Support
4000-4499	Student Services
4500-4799	Institutional Support
5000-5299	Physical Plant
5500-5699	Scholarships/Fellowships
6000-6999	Transfers
7000-7999	Auxiliary

Financial Planning Office:

Email: budget@memphis.edu

Phone: (901)-678-2117

Website: <http://www.memphis.edu/budget/>

The screenshot shows the website for the University of Memphis Financial Planning Office. At the top, there is a navigation bar with the university logo and the text "THE UNIVERSITY OF MEMPHIS". To the right of the logo are links for "Lambuth Campus", "myMemphis", "Webmail", "Faculty & Staff", "Contact", "Directories", and a search icon labeled "Search". Below this is a secondary navigation bar with links for "Academics", "Admissions", "Athletics", "Research", "Support UofM", and "Libraries". A third navigation bar lists "RESOURCES FOR..." with sub-links for "Prospective Students", "Current and Returning Students", "Parents", "Alumni", and "Veterans". The main heading is "Financial Planning". Below the heading are links for "Staff Directory", "University Budget Information", "FAQs", and "Links". A breadcrumb trail shows "Home > Financial Planning". The main content area features a large photograph of a campus courtyard with a fountain. On the left side, there is a sidebar with the following sections: "Presentations & Trainings" (Helpful guides from Financial Planning), "Finance Program Guide" (Your online resource for all things related to the Banner Finance system), "Forms" (All of B&F's forms in one place), and "Business & Finance" (The Division of Business & Finance at the U of M). At the bottom left of the sidebar is a blue button that says "Follow Us Online".

Why are Functional Totals Frozen in April?

- **The final current year budget is submitted as part of the Spring Budget**
 - Departments realign budgets and anticipate purchases
- **E&G control totals are compared against final year-end amounts**
- **Functional Expenditures exceed Estimated Budget - “Busting a Function”**
- **[Tennessee Board of Regents Policy 4:01:00:00](#)**

states that "once approved the institution may not exceed those functional control limits established by the Board without prior approval of the Chancellor"

What's New? / What's Due?



<i>Workshops</i>	<i>Date</i>
Budget Basics UC – Senate Chamber Room 261	Monday, March 14, 2016 9:30 – 11:00 AM
Accounting Basics UC – Senate Chamber Room 261	Tuesday, March 15, 2016 1:30 – 3:00 PM
Fixed Asset Workshop UC – Senate Chamber Room 261	Wednesday, March 23, 2016 10:00 – 11:00 AM
<u>Announcement:</u> A new automatic/online process for requesting PC191/staff scholarship/spouse-dependent forms is coming as part of a process improvement project - more details to come in March 2016	

<i>Activity</i>	<i>Due Date</i>
Revenue Projections Due to Financial Planning	Friday, March 11, 2016
<u>Due to Financial Planning for Spring Budget:</u> <ul style="list-style-type: none"> • Capital, R&R and Facility Projects • Expenditure Paper Budget Revisions • Position Paper Budget Revisions 	Monday, April 4, 2016
All Online Budget Revisions (BD4) Completed by 4:30	Friday, April 15, 2016
Spring 2016 1st Installment Fee Payment Deadline for students enrolled in IPP	Tuesday, March 1, 2016
Spring 2016 2nd Session Fee Payment Deadline to avoid deletion of classes for Students who are ONLY registered for any 2nd POT or RODP-RA2 and registered between January 30-March 11, 2016.	Friday, March 11, 2016

SRI Budget Model Update

SRI Website:

<http://www.memphis.edu/sri/>

Next Focus on Finance

March 17, 2016

1:30 - 3:00 PM

UC Memphis Room 340

Comments or suggestions?

Email: bffin@memphis.edu

Focus on Finance website:

<http://memphis.edu/focusonfinance>



THANK YOU!

www.memphis.edu/focusonfinance