

CUIBO Notes- November 8th, 2018

*** Dan Ewart was not able to present today. We will reschedule for December meeting, if possible.

Banner 9 Training Modules – Linda Keeney

Mandi from PDL has been publishing training up on the GoSignMeUp page. Everything is there for a new employee to start such as; Banner Navigation/ Finance Query/ Purchasing Card and Travel Expense/ Journal Document and Approvals. Human Resources have also taped their training sessions that will be available shortly. The Banner website is currently a work in progress but the hope is for it to be the specific location for all Banner References and information. Once this is completed in full there will be a notification sent out. Linda encourages everyone to take these training opportunities for refreshers and to learn Banner 9.

Email: banner9info@uidaho.edu if you encounter any issues. Example: Vendor issues

Post Doc Salary Guidelines- Kim Salisbury

Provost Office has been working with Market based compensation salary guidelines for post docs across campus. The new guidelines were sent out attached in yesterday's email. Post Docs market salaries are based on the associate professor market salary at 45% of the rate for the associate professor in the same CIP CODE. Allowing departments to hire from 90% of the market rate to 110% of the market rate, giving room for specific candidate qualifications. Grant funded positions may have specific minimums and maximums set by the granting agency; in such instance, we will defer to the amounts determined by the granting agency.

Budget Update – Trina Mahoney (phone)

Quick Update - People with separate 1R carry forward funds for GENED will all be processed shortly.

QUESTION- If the Dean wants to transfer 1R funds to the department, do they have to do a funds transfer?

ANSWER- If you want to allocate funds to a specific department within your college/unit, you can process a BUDGET Transfer. You can request that 1R indexes be set up for your departments and use these for processing budget transfers, or you can hand enter the FOAPAL information into the budget transfer journal document (in both cases the fund will be your 1R fund). You will only need to do a FUNDS transfer if you are wanting to give funds to a different college/unit – the funds transfer will move the funds from your 1R to their 1R fund.

PLEASE SEE THE INFORMATION SENT BY DEB EISINGER ON BEHALF OF TRINA MAHONEY ON 10/24/18 FOR ADDITIONAL DETAILS ON THE 1R FUND TYPE.

Routing for Banner and Argos Report Requests- Ron Town

We ask that if you have any requests for ITS related to Banner Finance, HR, or AR modules, that you send those to FinAccess@uidaho.edu rather than directly to ITS. In the near future, FinAccess will be utilizing the ITS ticketing system to receive and route such requests. At that point, we will likely deactivate the FinAccess email account. The Ticketing system is a much better way to track and respond

to these requests. FinAccess is the clearinghouse for report requests and other technical issues related to these Banner modules, and will route the appropriate requests to ITS when needed and with appropriate priority status identified. This will help ITS to manage resources in the most effective way.

Chart V Lab Update- Linda Campos

- FAQ Document included with yesterday's email as well

The past five weeks of Chart V labs have been very helpful in understanding questions that people have been having while working with Chart V. Moving forward however labs will be more on a monthly basis based on the attendance of the past Chart V Labs. We will keep everyone posted when we schedule the next Labs.

UPDATES – All PI's should have access to the Finance Self Service for non-banner users on Vandal Web. Step-by-step guide is available on Banner resource page under Report updates. If you wish to use this document to train your non-Banner users (faculty, directors, etc), you can download the Word doc and make modifications for your groups if the current guide is too long or detailed.

QUESTION- If I want to do a training for my college and I get a call from a faculty that wants help, why I am not seeing what they see on their screen/menu?

ANSWER- Because you have more access you will be seeing more. Try going to EMPLOYEES-FINANCE QUERY for Non- Banner users, this should be the same as what they are seeing.

QUESTION- Is the DOAR Report something we would submit through FINACCESS in order to create that report?

ANSWER – Transaction Detail is the replacement for the DOAR Report at the moment. But, yes, if you have a specific request like that, you should submit to FINACCESS for consideration.

TIPS

1. Discourage reporting by index
2. Use INDEX as a short cut, but you may not get reliable results if you try to report by Index – depending on whether you change FOAPAL fields on input forms after entering the Index, or if you have changed your Index mid-year and have not cost-transferred all expenses.
3. Re-examine business processes. As Banner has evolved, business processes developed 20 years ago should evolve as well.

Q & A on FY19 & FY20 Budget Plans-

***The following was sent in the email after the CUIBO Meeting...from Linda Campos:

I am sharing the following excerpt from the Faculty Senate Meeting talking points that were referenced on the UI Daily Register last week. I share the summary because I believe it is a good summary of VP Foisy's talking points. You'll also see a link to the slide deck from the Leadership Breakfast that I referenced today.

My apologies that we didn't have a lot of time to discuss this topic. I had intended to just take Q&A on it, but it appeared that many of you were not yet in the loop on the details of the FY19 and FY20 budget plans. Feel free to contact me, Trina Mahoney, or Kim Salisbury if you have any questions. If you have not yet discussed this with your VP's or Deans, that would be a good place to start.

Thank you.

Vice President for Finance and Administration Brian Foisy returned to senate for the second week in a row to conclude his presentation on U of I budgeting and financial processes. VP Foisy's PowerPoint presentation from both last week's and this week's presentations and for the Presidential Leadership Breakfast on Tuesday October 23 is available [here](#).

The U of I will experience a structural budget shortfall in FY19 of approximately \$2.1 million. This is an ongoing shortfall that has been covered in the past using one time funds. In addition, several UBFC projects, totaling \$2.9 million have been identified as urgent. Thus the total FY19 shortfall is \$5 million. Because of the time needed for planning, one time funds will again be used to address this shortfall. The responsibility for these funds will be determined based on the evaluation of programs in the most recent round of program prioritization. The impact on particular units within each VP area or college will be determined by the deans and VPs in charge of those units in collaboration with unit administrators and others in the areas.

Beginning in FY20 Foisy proposes that adjustments be made to base budgets to permanently resolve the continuing structural deficit and to create both a Presidential Initiative Fund and an Enrollment Contingency Fund to cover possible future enrollment shortfalls. Foisy stated that by adjusting base budgets and creating a contingency fund, future holdbacks and gain-sharing will not be necessary.

The VP for Finance and Administration will be scheduling several open university-wide forums to discuss strategic budget management. Once times, dates and locations are available, they will be included in the Important Dates below.

Meeting concluded at 11:00am 11/8/18.