



First Fridays

with the

University Budget Office

December 6, 2019

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Agenda

- Icebreaker
- Requisition Workflow
- Telecom
- Encumbrance Dashboard Demo
- Announcements/Reminders
- Open Forum – Q&A

Icebreaker:

Riddle:

Which of Santa's reindeer can be seen from outer space?

Welcome - Dan Tenney

UNT System Vice Chancellor for Finance/CFO

Financial planning and analysis; accounting, financial reporting, and payroll; treasury; and procurement and payment services, including P-Card, travel, and the Historically Underutilized Business (HUB) Program

Requisition Workflow

Ace Gere

ERP Analyst

UNT Requisition Workflow

- Error Routing
- Asset Management Approval
- Supplier Approval
- Purchasing Approval
- Lease Approval
- PI/Project Holder Approval
- CRO Approval
- Org Dept Manager Approval
- VP Approval
- Special Approval
- OGCA Approval
- Purchasing Manager Approval

UNT Requisition Workflow

Error Routing

- Missing Approver
- Inter-Unit Vendor
- Old, inactive, cat codes not used in reqs, example: Travel
- Invalid Alt Accounts, examples: 0000, 8000, 8888, 9999
- Budget Error not equal to 'Valid'

UNT Requisition Workflow

Asset Management Approval

- Any Req lines coded as assets
- Req Lines NOT coded as Assets, but \$5,000 or over

[See attached spreadsheet](#)

\$5,000 and over highlighted yellow

Supplier Approval

- Vendor ID is blank
- RFQ line indicator is blank

UNT Requisition Workflow

Purchasing Approval

- Always reviews all Reqs

Lease Approval

- Req lines coded as lease

[See attached spreadsheet](#)

PI/Project Holder Approval

- Project ID is not Blank

UNT Requisition Workflow

CRO Approval

- PCBU = NDISC, NFCAP, NGRCT or NINTP

Org Dept Manager Approval

ERP Analysts may refer to this as the “Fund Manager Approval”

Department Fiduciary Approval

- Excludes PCBU = NGRCT

VP Approval

- \$100,000 and over

UNT Requisition Workflow

Special Approval

- Risk Management Approval
- State Membership Approval
- Printing Approval
- Furniture Approval
- Vehicle Purchase Approval
- Live Animal Approval
- HR Job Ad Approval
- Tax Account Approval

[See attached spreadsheet](#)

UNT Requisition Workflow

OGCA Approval

- Expense Account Approval/PCBU = NGRCT
[See attached spreadsheet](#)
- \$10,000 and over/PCBU = NGRCT
- All Reqs with PCBU = NINTP & Proj ID GA9#### or GI####

UNT Requisition Workflow

Purchasing Manager Approval

- All Reqs \$10,000 and over
- Federal Grants \$3,000 and over



Telecom Review

IT Shared Services

Telecom Agenda

- Telecom Overview
- Pinnacle Overview
- Updates/Changes to Billing
- Questions – Telecom Support

Telecom Support

Telecom supports the following Institutions:

- UNT Denton
- UNT Dallas
- UNT System

Telecom Services

Telecom Services Include:

- Telephones / Conference Phones
- Cellular
- Voicemail
- Teleconferencing
- Pager
- Consultation
- Wiring/Cabling
- Facilities Projects

What Is Pinnacle?

- Pinnacle is the tele-management system that Telecom uses to track all service records, equipment, and expenses.
- Where departments can view monthly Telecom charges

How To Get Access To Pinnacle

- Account holder must email Telecom.Support@untsystem.edu
- Provide name and EUID of person needing access
- Provide a list of each chart string or organizational department number

How To View Your Telecom bill

URL: <https://www.mypinnaclelogin.com/unt>

UNT SYSTEM
IT Shared Services

Acct. Manager ▼

EMILY GAUTRAUD

Accounts Home Logout

Account Billing

Account Billing

List

Search Create Multiple Account Report

Account Billing Saved Search All ▼ Clear Manage Save

Quick Search

Billing Date [] CST [] - [] CST []

Account Number [] Account Name []

ENTER SEARCH CRITERIA AND CLICK SEARCH

Understanding Your Monthly Bill

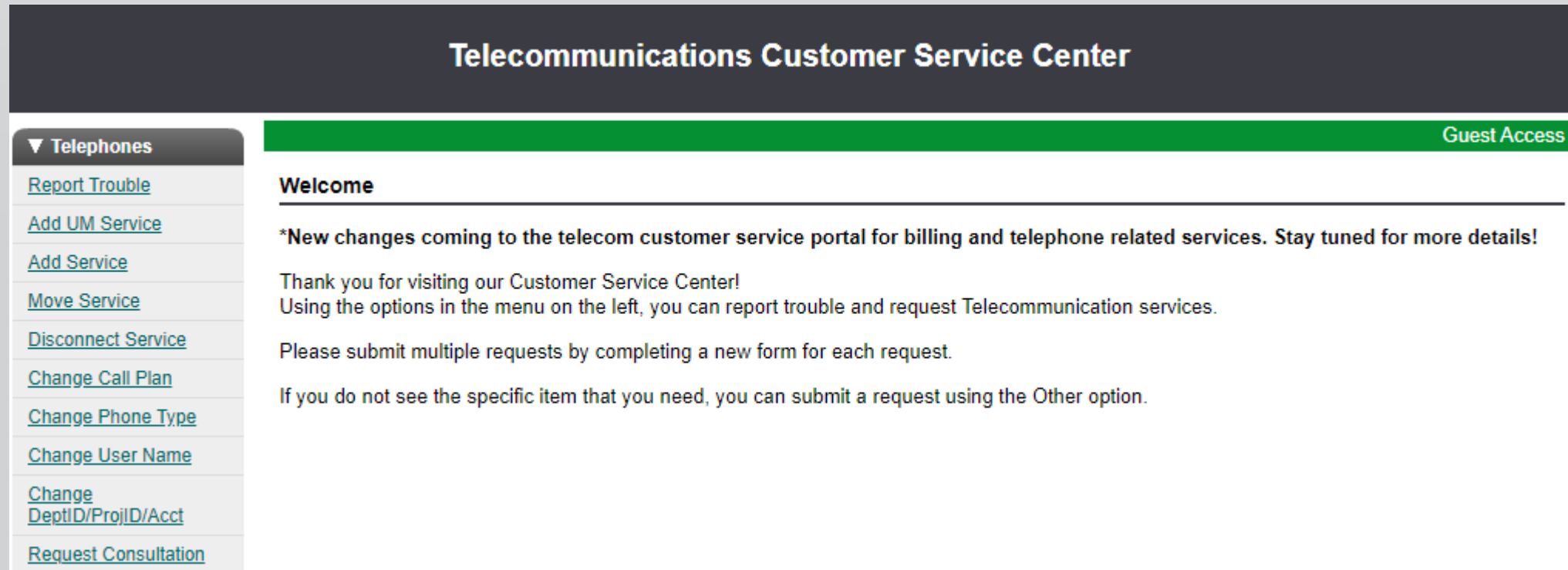
- **Subscriber** is the person or department to whom the service is assigned
- **Non Usage Charges** include monthly recurring charges and one time charges
- **Usage Charges** include long distance charges
- **Subcodes** correspond with the account number in cognos

Example 80073 =Telecom Monthly Charges-Exp

How To Request Bill Changes

Submit a ticket via the Telecommunications Customer Service Center:

<https://telecomsupport.untsystem.edu/>



The screenshot shows the 'Telecommunications Customer Service Center' website. At the top, there is a dark grey header with the title 'Telecommunications Customer Service Center' in white. Below the header is a green navigation bar with 'Guest Access' on the right. On the left side, there is a dark grey sidebar with a dropdown menu labeled 'Telephones'. The sidebar contains the following links: 'Report Trouble', 'Add UM Service', 'Add Service', 'Move Service', 'Disconnect Service', 'Change Call Plan', 'Change Phone Type', 'Change User Name', 'Change DeptID/ProjID/Acct', and 'Request Consultation'. The main content area has a white background and a green border at the top. It features a 'Welcome' section with a horizontal line. Below the line, there is a bolded announcement: '*New changes coming to the telecom customer service portal for billing and telephone related services. Stay tuned for more details!'. This is followed by a thank you message and instructions on how to use the service center, including a note about submitting multiple requests and an 'Other' option for unlisted items.

Reasons To Submit A Ticket

All moves, adds, or changes require a ticket:

- New Service
- Service Changes
- Phone Type/Equipment Changes
- Name Changes
- Location Changes
- Disconnect Service
- Account Changes
- Report Trouble
- Other (voicemail password resets, consultation, requests for quotes)

Questions About Your Bill

Email Telecom Support @ Telecom.support@untsystem.edu for:

- Ticket Status
- General Questions

Learn More About Telecom

Visit IT Shared Services Telecommunications Support/Services:

<https://itss.untsystem.edu/divisions/ets/esis/telephone>

Contact Information:

Leah Cook

940-565-4191

Leah.Cook@untsystem.edu

Telecommunications Support and Services

How to Request Service or Report an Issue:

For telephone moves, adds, changes, or disconnects, request consultation, reset voice-mail password, order patch cords, report trouble, or any other telephone-related issue please:



[Click here to SUBMIT a TICKET.](#)

NEWS

Voicemail upgrade for UNT Denton

ITSS upgraded voicemail service for UNT Denton customers on November 15, 2019. [Click here](#) for more information.

Customer Guides:

- [How to access your monthly bill in Pinnacle](#) 
- [How to obtain access to view phone bills](#) 

Please address any questions about this page or contact the department at telecom.support@untsystem.edu.

Encumbrance Dashboard (DEMO)

Announcements & Reminders

Announcements & Reminders

[Budget Checking Chart](#)

- Created to assist departments understand the budget checking process

Budget Checking - Account Levels

	ABA	ePAR	ePro	IDT	PCard	Travel
Budgetary	D-Level	* D-Level	C-Level	** C-Level	* C-Level	*** C-Level
Non-Budgetary	00000 ACCT TREE ROOT NODE					
Non-Sponsored Project	A5000					
Sponsored Projects	C-Level	* C-Level	C-Level		* C-Level	*** C-Level

* **ePARs** and **PCard** transactions do not budget check, they check for a valid chartstring/combination. The D-Level must exist for all budgetary chartstrings & the C-Level must exist for Sponsored Projects. Agency Funds 800 & 801 are not eligible for ePAR use.

** **IDTs** do not budget check when submitted or approved. Budget checking occurs when the Controller's Office creates an IDT journal.

*** **Travel** budget checking process may change after transition to Concur.

Announcements & Reminders

Surplus Requests

- Inventoried Items are still the department's responsibility
- Please do NOT place in hallways/loading docks
- Please do NOT Surplus trash/junk; this includes broken items **with the exception of technology & controlled assets.**

Announcements & Reminders

If an item is capable of storing data, please be sure to Surplus it. For example:

- Tablets
- Laptops
- Desktops
- Servers
- Stereos
- Disk players
- Projectors
- Camera
- TVs
- DVD Players
- Video equipment
- Drones
- Fire Arms

If you're unsure about an item, please email property.manager@unt.edu

Announcements & Reminders

ABAs

- There are known issues with multi-line ABA approvals
- If asked to provide a journal type when approving your ABA, please call (x3233) or email the [Budget Office](#)
- There is a temporary work-around while the programmers work to resolve the issue

Announcements & Reminders

Foundation Fund Mass Updates

- In November, a mass update was performed to the Fund descriptions of Foundation held endowments.
 - Population affected: All Foundation-held endowments that did not contain the Foundation gift account number (FXXXX) in the description
 - Update Performed: The description was modified to include the Foundation account number. Those descriptions containing “End” were also updated to “Rest.”
- Example, Fund 200039 updated:
 - FROM: DepOp/End-M. Pearson Bio Res
 - TO: DepOp/Rest-MaurinePearson-1077

Announcements & Reminders

Open Lab

Did you know?

- Each month, the Controller's office is present to assist with IDT questions!
- The Insights Team will be present at this December's Open Lab to assist with questions about the Insights Encumbrance Dashboard.

Continuous Improvement Orientation

DECEMBER 18, 2019
11:30 – 12:00 PM
SSB 102



Office of Continuous Improvement | 940-565-4311 | CITeam@unt.edu
<https://continuousimprovement.unt.edu>
Support and Services Building



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Learning Objectives:

- Learn about our up and coming problem solving training and how it can help you operate more efficiently.
- We will cover the ways this training could help you at work and the commitment expected from participants.

Registration Steps:

1. Go to unt.bridgeapp.com
2. Click on the Training Calendar tab
3. Select the Agenda View on the right side of the screen
4. Search for “[Continuous Improvement Orientation](#)”
5. Click Register.
6. Download the invite and add the class to your calendar!

Great for departments,
offices, and colleges.

Learn about the CI
Problem Solving Training

Register at
unt.bridgeapp.com
“[Continuous Improvement
Orientation](#)”

Questions?
citeam@unt.edu

Upcoming Cash Handling Training: January 7, 2020: Wooten Hall 121

- Registration now open on UNT Bridge

TUESDAY, JANUARY 7, 2020

Cash Handling Training

3:00 pm - 4:00 pm CST (America/Chicago -06:00)

Location: WH 121

Instructor: Larry Worthy

Description

This is a required annual course for all UNT employees who handle cash, which includes currency, checks, EFTs, ACHs, credit cards, or debit cards. Participants will be familiarized with UNT's policies and with the compliance requirements that must be met by any participant or department that handles cash. Attendees will gain a functional understanding of the controls designed to safeguard cash.

Seats Left

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**Thank You
& Happy
Holidays!!!**