



TOGETHER WE REACH
 FINANCIAL & BUSINESS SERVICES

Welcome & Thank you for Attending

Financial and Business Services
 Introduction Course


FBS Intro Course


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Course Agenda

- Course Objectives
- FBS Role
- Chart Field Discussion
- Departmental Overview (FBS Websites)
 - Who we are
 - Where we are located
 - What are our missions and responsibilities
 - Contact & basic information
- Additional Resources
 - CIS – Campus Information System
 - FBS News
 - FIS – Financial Solutions
 - BPAG – Business Process Advisory Group
 - Policy & Procedure Manual/ Rules
 - Further Training/Task Questionnaire
- Group Discussion – Q&A
- Total Course time: 90 minutes

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Course Objectives

- After course, participants will be prepared to:
 - Better formulate meaningful questions about FBS to their supervisors
 - Better find available resources to help answer questions
 - Be better able to proceed according to policy and recommended best practices
 - Develop a professional development plan to cater available training to individual's needs

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Why does FBS exist?

- Facilitate Accountability, Integrity, Accuracy of Financial Data
 - Policy, procedures, Rules
 - Internal Controls
 - Training
 - Maintain useful and secure systems
- Transparency in reporting to:
 - Internal and External Stakeholders
 - Government funding agencies, rating agencies, auditors, donors, community, students, parents

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Chart Fields

- Provide categorization/classification of accounting and budget items
- Chartfields for University of Utah
 - BU – Business Unit
 - OrgID, ORG – Organization
 - Fund
 - Activity
 - Project
 - Account
 - Allowable/Unallowable (A/U)

BU	ORG	FUND	ACTIVITY	PROJECT	ACCOUNT	AU
01	01111	1001	13095		62600	1
01	00116	5000		59000904	62600	
02	90000				62600	

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Chart Fields (cont.)

- Business Unit (2)
 - 01 University of Utah
 - 02 University Hospital & Clinics
 - 03 University Neuropsychiatric Institute
 - 04 University of Utah Research Foundation
- OrgID (5)
 - Large group with responsibility for people, space, budget, funding, etc.

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Chart Fields (cont.)

- Fund (4)
 - Source of funds
 - 1001 General Fund
 - 2xxx Designated Funds (sales & service of academic or service units)
 - 4xxx Auxiliary Enterprises (student life)
 - 5000 Contracts and Grants
 - 6000 Gifts

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Chart Fields (cont.)

- Activity (5)
 - Distinguishes business activities within same fund
- Project (8)
 - Contracts & Grants
- Except for plant fund, (construction projects) you will use either an activity OR a project, not both

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Chart Fields (cont.)

- Account (5)
 - The nature or category of transaction
 - Account is not equal to chart fields, only an element of chart fields
- Allowable/Unallowable (1)
 - 0 Unallowable
 - 1 Allowable
 - Only used for:
 - Account values 50000 – 89999
 - Business Unit 01
 - Funds 1001, 2xxx, or 6xxxx

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FBS Departments

- Refer to web site:
<http://fbs.admin.utah.edu>
- Where each office located
- How to contact each department
- General Description of duties
- Leadership

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Additional Resources

- CIS – Campus Information System
 - How to navigate to CIS
 - Bio/Demo Information – EMAIL IMPORTANT
 - FBS News
 - FBS Pagelet

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Additional Resources (cont.)

- FIS – Financial Solutions
- BPAG – Business Process Advisory Group
- Policy & Procedure Manual
 - Distinguish between Policy & Rules
 - Distinguish between Rules & procedure
- Further Training/Task Questionnaire
- www.training.utah.edu


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Group Discussion

- What has been the greatest challenge since you started your position?
- How do the challenges in your area affect what we have discussed? Any conflicts?
- Other Questions?
- Training Coordinator:
 - Kori DeHaan
 - 581-4149
 - kori.dehaan@admin.utah.edu

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Conclusion

- After this course, we hope you feel more confident to:
 - Contact any of the departments for additional information
 - Know how to contact the appropriate person for your question or concern
 - Identify which courses you still need to attend
- Course evaluation – please provide feedback to improve this course
- Thank you!

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