Charting Our New Path

General Campus Training

University of Dayton

Agenda

Review of FOAPAL & Available Tools
....

Purchasing & Ordering Impacts:

- Runway
- Pcard
- Travel Reimbursement
- Campus Requisition

- Catering Ordering
- Work Orders
- Invoices (Accounts Receivable)

....

Hiring & Time Approval Impacts:

- ePAF / PAF
- GA Form
- PageUp

- Handshake
- Kronos

....

Next Steps & Questions
....

Dual Chart Users:

- Crosswalk Application
- Runway
- Deltek Timecard System

- Travel & Expense Form
- Reporting

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Available Tools

Crosswalk Application

- Full FOAPAL Code Listing (also known a the FOAPAL Values Print Version), and UD FMT Validation tool should be used in conjunction with this application

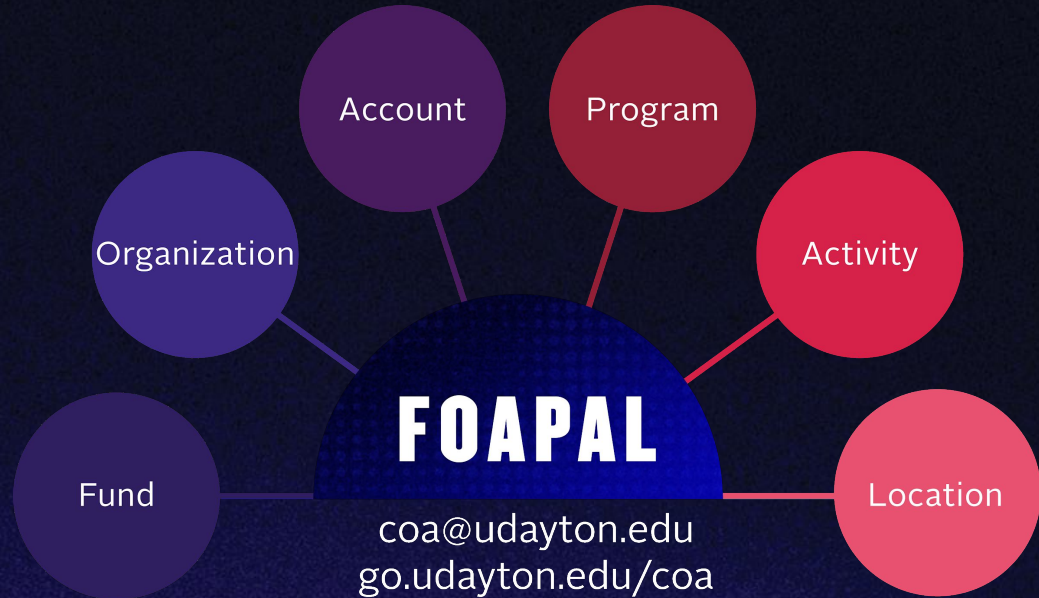Located at:

go.udayton.edu/coa-xwalk

Available Tools

Chart of Accounts Job Aids:

- A 101 guide has been created for each element of the FOAPAL string.

- They, along with other training resources, job aids, and project communications are located at:

go.udayton.edu/coa

Account

Program

Organization

Activity

FOAPAL

Fund

Location

coa@udayton.edu
go.udayton.edu/coa

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Purchasing & Ordering Impacts:

Runway

Pcard

Travel Reimbursement

Campus Requisition

Catering Ordering

Work Orders

Invoices (AR)

Accounting Indexes (Enter Fund) will no longer be used in Runway.

A complete FOAPAL string will be required.

Runway user spend authority and Level 1 and 2 Approvers will be based on Organization (not Fund).

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Purchasing & Ordering Impacts:

Runway

Pcard

Travel Reimbursement

Campus Requisition

Catering Ordering

Work Orders

Invoices (AR)

Users can save frequently used FOAPAL strings and use them to auto-populate the FOAPAL within the Runway purchasing cart. .

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Purchasing & Ordering Impact:

Runway

Pcard

Travel Reimbursement

Campus Requisition

Catering Ordering

Work Orders

Invoices (AR)

Dedicated training is scheduled for the weeks of July 15th and 22nd .

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Purchasing & Ordering Impact:

Runway

Pcard

Travel Reimbursement

Campus Requisition

Catering Ordering

Work Orders

Invoices (AR)

FOAPAL string is entered in upper right corner of form.

Three FOAPAL strings may be entered with percentage input for auto-calculating subtotals.

Link to the Travel Expense Report

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Purchasing & Ordering Impact:

Runway

Pcard

Travel Reimbursement

Campus Requisition

Catering Ordering

Work Orders

Invoices (AR)

Account & Order Number fields have been replaced with FOAPAL string.

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Campus Requisition Form

Transfer Information

Buying Department Name	Contact Name	Location for Delivery (Building & Room No.)	+4 Zip	Selling Department Name

Business Purpose of Transaction:

Buying Department FOAPAL string:

Fund	Organization	Account	Program	Activity	Location

Products or Services (Skip if attached receipts include all details requested below and write "See Receipt below.)

Quantity	Description of Items or Services Requested	Unit Price	Amount
		Total:	

Authorized Signature (Buying Department):_____ Date: _____ Ext.:_____

Selling Department FOAPAL string (to be completed by selling department):

Fund	Organization	Account	Program	Activity	Location

Link to the Campus Requisition Form

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Purchasing & Ordering Impact:

Runway

Pcard

Travel Reimbursement

Campus Requisition

Catering Ordering

Work Orders

Invoices (AR)

Account number has been replaced with FOAPAL string.

Phone & Email orders will also require FOAPAL string.

How do I place my online catering order?

For events outside of seven business days or more, select your catered favorites with ease and convenience right from your desktop! You may also opt to call one of our dedicated Catering Specialists and they will be happy to guide you through menu selections and event details.

Event Date

Month

Year

2019

Building/Room

Estimate Number of Guests

FOAPAL String:

Detailed Menu Selection

Detailed Table Set up

Additional Notes, Dietary Restrictions, Layouts, Agendas, Setup Instructions

Attachments

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Purchasing & Ordering Impact:

Runway

Pcard

Travel Reimbursement

Campus Requisition

Catering Ordering

Work Orders

Invoices (AR)

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Purchasing & Ordering Impact:

Runway

Pcard

Travel Reimbursement

Campus Requisition

Catering Ordering

Work Orders

Invoices (AR)

Facilities Management (FM) work orders will require Fund, Org and Location. FM will populate Account, Program, and Activity based on the nature of the work.

Please note, for general campus work orders (such as hallway maintenance) for which a particular department will not be financially responsible, call FM at 9-3753 to submit a request.

UDit work orders will remain unchanged. When necessary, UDit will make contact to obtain a FOAPAL string.

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Purchasing & Ordering Impact:

Runway

Pcard

Travel Reimbursement

Campus Requisition

Catering Ordering

Work Orders

Invoices (AR)

Account fields have been replaced with FOAPAL string input fields, allowing split deposit options.

Contact the Office of the Controller at controller@udayton.edu for a copy of the invoice template and invoice number to use.

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Invoice

Invoice #:   9-

Date: 6/15/2019

Bill to:

Quantity	Description	Unit Price	Amount

Total $ -

Payment Options:
1 For credit card payments: go.udayton.edu/invoice
2 Checks payable to University of Dayton to:
   University of Dayton
   Office of Student Accounts
   300 College Park
   Dayton, OH 45469-1600

PLEASE INCLUDE INVOICE NUMBER ON ALL PAYMENTS
For questions, please call the Office of Student Accounts at 937-229-4141 or email at fss@udayton.edu.

Thank You For Your Business

OFFICE OF STUDENT ACCOUNTS USE ONLY

Fund	Organization	Account	Program	Activity	Location	%	Subtotal
						0%	0

Hiring & Time Approval Impact:

ePAF

PAF

GA Form

PageUp

Handshake

Kronos

The entire FOAPAL string will now be required in the Labor Distribution section.

The Default from Index button will no longer be available since Index will no longer be utilized.

Hiring & Time Approval Impact:

ePAF

PAF

GA Form

PageUp

Handshake

Kronos

Index(es) - Account(s) fields are replaced with FOAPAL string.

See Job Aid for details on entering multiple strings, if required.

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Hiring & Time Approval Impact:

ePAF

PAF

GA Form

PageUp

Handshake

Kronos

Position Info dropdown has been updated to reflect Chart F.

Funding Information has been updated to allow FOAPAL string input.

UNIVERSITY OF DAYTON GRADUATE ASSISTANT (GA) CONTRACT

I: STUDENT INFORMATION

Last Name: _____ First Name: _____ Middle: _____ Student ID: _____
Student Email: _____ Student Degree Program: _____ Degree Lvl: _____
Academic Year: _____ Contract Type: ☐ NEW ☐ RENEWAL Apptmt: _____

GA Dept Code/Org #: _____ Phone Ext: _____ GA +4 Zip: _____

II: POSITION INFORMATION

Supervisor: _____ Supervisor's Phone Ext: _____

Supervisor's Dept Code/Org #: _____ Supervisor's +4 Zip: _____
Position No. (HR Use Only): _____ GA's Time Card Approver (if applicable): _____
GA Work Location: Bldg.: _____ Rm.: _____ On or Off Campus position? ☐ ON ☐ OFF
Stipulations/Instructions/
Assignment Summary: _____

III: FUNDING INFORMATION

Dates of work for pay (mm/dd/yyyy) First Day: _____ Last Day: _____
Pay Period Effective Dates (HR Use Only): ___ - ___ ___ - ___
Period of tuition reimbursement coverage: From: _____ To: _____
Total Tuition Remission Hours: _____ Tuition Cost per Credit Hr: _____
Total Salary Amount: _____ Semi-monthly Pay: _____

TUITION						
Fund	Org.	Account	Program	Activity	Location	%

STIPEND						
Fund	Org.	Account	Program	Activity	Location	%

UNIVERSITY/LAB FEES						
Fund	Org.	Account	Program	Activity	Location	%

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Hiring & Time Approval Impact:

ePAF

PAF

GA Form

PageUp

Handshake

Kronos

The FOAPAL string is now utilized when a user creates a new position description.

Additional strings can be input for split labor.

An additional FOAPAL string can be input as a funding source for advertising.

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Hiring & Time Approval Impact:

ePAF

PAF

GA Form

PageUp

Handshake

Kronos

The Handshake website is unchanged.

Hiring Managers who utilize the Report a Hire form will now enter a FOAPAL string in place of a Labor Fund & Department Org. number.

Report a Hire

Use this form to report student employment hires. You MUST mark the student as hired in the applicant pool for your posting in Handshake prior to completing the Report a Hire.

Your email address (iferri███████on.edu) will be recorded when you submit this form. Not you? Switch account

* Required

Supervisor Name

Your answer

Fund Number: *

Your answer

Organization Number: *

Your answer

Account Number: *

Your answer

Program Number: *

Your answer

Activity Number:

Your answer

Location Number:

Your answer

Hiring & Time Approval Impact:

ePAF

PAF

GA Form

PageUp

Handshake

Kronos

Not Impacted!!!

Hypercare

- coa@udayton.edu will become a TeamDynamix ticket
  - Tickets to be routed to the Controller's Office to answer questions directly or forward onto Budget Office, HR, Runway, or unit Business Officers appropriately
  - Tickets created via phone calls and emails to the general IT help desk, as well
- Open Labs, July 1st-3rd & July 8th-12th
  - Specified times for campus constituents to come and receive in-person training/assistance
  - Located in 3-4 computer labs across campus
  - Operated by Change Task Force and BOLT
  - Schedule communicated via website, email & porches

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On-Going Training

- Additional training for identified users, weeks of July 15th & 22nd
    - Pcard
    - Cognos
    - Banner Self-Serve
- Repeat training, August 26th-30th (*still to be confirmed*)
    - Intended for individuals who have been off-campus throughout the summer months or have missed other training opportunities
    - Sessions will be a repeat of:
        - FOAPAL Refresher
        - General In-Person Training

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Questions?

For additional information, go to go.udayton.edu/coa
or email coa@udayton.edu