New Business Lead Checklist

For staff new to COE with HR and finance roles.

A downloadable PDF version of this checklist is also available on COE: Box.

I. Review the following College of Education (COE) info:
- COE web site
- COE organization charts
- Dean’s Office units contact information
- Dean’s Office coverage for college units

II. Complete all steps below as relevant to your role:
- Sign up for appropriate listservs and newsletters for your role(s).
- Electronic Office Management (EOM) system updates.
  1) Submit “Update electronic office manager” form.
  2) Make appropriate online updates in EOM. Review and update manager, delegates, people who sit on desks, and signature authorizations.

Resources:
- EOM checklist
- Online EOM help
- Online EOM training
- EOM on AskUs
- EOM Glossary

- Update UT Department System with new contact information.
  Resources:
  - Online UT Department System help
  - UT Department System Glossary

- Update Organizational Hierarchy System (OHS).
  Resources:
  - About OHS
  - Online OHS Contacts help
  - Contact Type Definitions
  - OHS Glossary
  - OHS Contacts Support

- Update DPUSER contacts in the Mainframe for the Login Group (DP command). Use UN command to create new logins. To view current authorizations for another user as a reference, use UA command. DPUSER is used to create and unlock mainframe logon IDs.
  Resources:
  - Employee Authorizations in HRMS
  - Online DPUSER Applications Authorizations help
  - DPUSER on AskUs

- Update Procurement Card (Procard) users/cards as needed, and review all related policies, guidelines, and procedures.
  - Update Master Routing Views in EOM to ensure Procard vouchers route correctly.
Contact the Dean’s Office HR Team at COE-HR@austin.utexas.edu to request appropriate Workday roles.

Request Cognos access, Financial and/or HR as appropriate to your role, by emailing COE-HR@austin.utexas.edu.

Resources:
- Cognos FAQ
- Cognos Cubes and Reports

III. Training:

Complete all Workday training appropriate to your role. View “Training by Area” on the Workday Training site.

Cognos training appropriate to your role.

Complete additional training appropriate for your role:

- HR roles:
  - See “Suggested training for HR roles” section of COE Business Services Wiki.
- Finance roles:
  - Review topics in “Financial & Administrative” section of COE Business Services Wiki.
  - Review “Training Resources” on Financial and Administrative Services site.

Review COE Business Services Wiki:

- All roles: Administrative Resources and all subsections
- HR roles: Human Resources and all subsections
- Finance roles: Financial Administration and all subsections