

# Admin U Organization and Structure

Admin U: Impacting the world of UTD

## Basic Core Classes

Admin U 1: Creating a Positive Culture of Success

Admin U 2: Admin Essentials 1— Getting Things Done

Admin U 3: Admin Essentials 2— Getting Things Done

Admin U 4: Proactively Managing Your Work World

Admin U 5: Event Planning

Admin U 6: Business Communication and Etiquette

Admin U 7: Safety and Security

Admin U 8: 360 Leadership (Lead from Where You Are)



Take the 8 Core Classes Plus 5 Credits from the Electives Below

Take the 8 Core Classes Plus 8 Credits from the Electives Below

Take the 8 Core Classes Plus 11 Credits from the Electives Below

Take the 8 Core Classes Plus 16 Credits from the Electives Below

## Electives

### Professional Development

Performance Management

Navigating Workplace Conflict

Emotional Intelligence Series

Motivating Yourself and Others

Office Etiquette

4 Disciplines of Execution

### PeopleSoft University

If you have completed PeopleSoft University you can receive 2 Credits toward Admin U.

### Business and Human Resources

- Account Reconciliation
- HR Hiring - PA 7
- HR Benefits and Leave
- HR Employee Relations
- Rocking the Top 20 Risks
- Three F's of Fraud
- Clues to Solving Internal Audit
- Basics Bdg Ovrw & Rpt Cncl
- Intro to Budget Transfers & IDT
- Introduction to ePARs
- Introduction to eProcurement
- EAJ Sole Source Form How/When
- EAJ/ RFS Combo Training
- Accounts Payable eProcurement
- Basic Reports eProcurement
- Independent Contractors
- One Card (Approver)
- One Card (Cardholder)
- One Card Fundamentals Year End
- E-Procurement Purchasing Essentials
- Receiving in eProcurement
- Travel (Travel/Travel Essentials)
- RFP-Formal Bid Request
- Request for Solicitation

### Technology Classes

In the past, UTD's Office of Information Technology has offered special classes to help individuals develop their software skills, particularly in Microsoft Office products. These classes are no longer offered by OIT. If you have taken any of these classes in the last two years, you will receive credit toward your achievement level. (**Note: Credit is not given for basic Oracle, Orion, or PeopleSoft training.**)

## Admin U: Impacting the World of UTD

### Mission of Admin U:

*Recognizing the critical nature of the University's administrative support roles, Admin U's mission is to provide training and resources, as well as ongoing growth and development opportunities, to ensure the success of our administrative support staff.*

### Summary of Admin U:

The Admin U certification series has been designed to provide both initial and ongoing training for those who serve the University in administrative support roles. In the past, the series was comprised of seven core classes. Beginning in 2019, an eighth class was added to the core. These eight classes provide the foundation for all other classes. These core classes will be offered in a cohort format.

With their supervisors' support and permission, participants in Admin U may choose to take electives that build upon their current job knowledge and skill; thereby, taking them to higher levels of proficiency. These electives may also be selected based upon the specific roles and duties assigned to the participant.

The participant will earn a standard certificate for completing the eight basic core classes. In order to recognize exemplary employees, we have designated four additional certification levels beyond the standard certificate:

1. **Ruby Level** – The participant completes five additional elective classes
2. **Sapphire Level** – The participant completes eight additional elective classes
3. **Emerald Level** – The participant completes eleven additional elective classes
4. **Diamond Level** – The participant completes sixteen additional elective classes

**The Eight Core Classes** – The eight core classes, as well as the majority of our elective classes, emerged after 18 months of interviews and discussions with multiple departments and Administrative Assistants across the campus. In addition to these discussions, Human Resources also consulted with other Universities about their training practices for administrative staff. (Note: While the sessions below are numbered and listed in order, sessions 4 – 8 are not offered in sequence due to the availability of the subject matter experts that will be teaching these sessions. Please be sure you check the dates.)

**Session 1: Creating a Positive Culture of Success at UTD** – Session 1 is designed to give the participants a better understanding of the UTD's mission, vision, values, and culture through examining the University's organizational structure. In this session, we will also discuss best practices for personal growth and success.

**Session 2: Admin Essentials I: Getting Things Done** – Sessions 2 and 3 will be conducted in a computer lab using an interactive and “hands-on” format where the participants will be guided by the instructor(s) to explore the University’s web pages to find critical information, forms, documentation, policies, etc. Content will be based and presented according to the organizational structure of the University with the intent of providing participants with a comprehensive overview of the reporting lines, culture, and values of the University that were introduced in Session 1.

**Session 3: Admin Essentials II: Getting Things Done** – This will be a continuation of Session 2.

**Session 4: Proactively Managing Your Work World** – Session 4 will concentrate on practical ways to organize the office (and the boss!). Time will be dedicated to learning best practices as they relate to efficiently managing files, multiple calendars, projects, and time.

**Session 5: Event Planning** – This session will be led by Event Planners from the Office of Advancement. This class will focus on all things necessary to plan events on the UTD campus including room reservations, facilities requests, catering, and risk management.

**Session 6: Business Communication** – Elizabeth Bruce, coordinator of the Business Communication Center from the Jindal School of Management, will be teaching this class. She will discuss and demonstrate best practices as they relate to email, letters, phone calls, and face-to-face communication as well as addressing how to effectively interact in a culturally diverse workplace.

**Session 7: Campus Safety & Security** – This session, conducted jointly by Environmental Health and Safety, UTD Police, and Information Security, explores ways to keep our campus safe and steps to take during emergency situations. In addition, the class will examine the latest scams and information security updates.

**Session 8: Lead from Where You Are (360 Degree Leadership)** – Formerly an elective class in Admin U, this class is now a part of the core of classes. This class is designed to assist individuals in understanding that everyone has the potential and responsibility for leadership. The goal of the class is to help people understand the strength and influence of where they currently reside in the workplace and to introduce them to skills that will help them lead from that position.

### **Potential Electives**

**A. Professional Development Classes** (*Participants in Admin U who have completed any of these classes within the past two years will be given credit toward their certification. These classes are typically offered every semester. We have included the schedule below.*)

- **The Four Disciplines of Execution:** Based on the “wildly” successful book, The 4 Disciplines of Execution, this class introduces the participants to the simple, repeatable, and proven formula for executing important priorities. The 4 Disciplines include: 1)

Focusing on the Wildly Important; 2) Acting on Lead Measures; 3) Keeping a Compelling Scoreboard; and 4) Creating Accountability. **(March 17)**

- **Motivating Yourself and Others – Workplace Motivation:** Participants will explore key concepts behind employee motivation and learn the importance of appreciation, freedom, expertise, and meaningfulness to motivate themselves and encourage others. **(May 19)**
- **Office Etiquette:** This workshop focuses on how to be a great colleague by understanding and applying the Platinum Rule. Best practices in the workplace will be discussed. **(July 14)**
- **Emotional Intelligence Series** - We will offer one credit for each of the five Emotional Intelligence (EQ) classes taken. These courses introduce the concept of emotional intelligence and provide opportunities to personally assess where your skill sets are now and what you might do to enhance those skills. We will dig below the surface to understand what competitive advantages emotional intelligence offers and ways to incorporate it into your career at UT Dallas.

The schedule for the five EQ classes are detailed below:

1. Emotional Intelligence: The New Standard for the Workplace - An Introduction to Emotional Intelligence (TBA)
  2. EQ Practicum 1: Understanding Yourself (February 10)
  3. EQ Practicum 2: Managing Yourself (February 24)
  4. EQ Practicum 3: Understanding Others (March 10)
  5. EQ Practicum 4: Building Relationships (March 24)
- **Navigating Workplace Conflict:** This class, also was formerly a part of our Manager and Supervisor Certification Series. In the class we discuss how to effectively manage conflict in the workplace by learning your own preferred style of dealing with conflict as well as exploring alternative styles, their strengths and drawbacks, and when to best implement each style. **(TBA.)**

***B. Business and HR Classes:*** *With the help of our training partners across campus we have expanded our “elective” offerings to include special trainings by the Office of Budget and Finance and the Office of Audit. Below is a list of classes that we have included in the electives that our Admin U participants may use for additional credit. **Keep in mind that our credits are offered 2 to 1 (i.e. participants get one hour credit for every 2 hours in class.) So if a “Business” class only last for 1 hour the participant will receive ½ hour credit.***

## ***Business/Finance***

- **Rocking the Top 20 University Risks (3/4 Credits) – (February 23)**  
Bad things can happen if we don't effectively manage our risks. That's why it's important for everyone to work together to manage risks with the right amount of controls in place. Everyone shares this responsibility to help the university achieve its goals and strategic plan. Join us as we learn how to rock the top 20 university risks! (Instructor: Toni Stephens, Chief Audit Executive)
- **The Three F's of Fraud: Fundamentals, Flags, and Foils (3/4 Credits) (TBA)**  
Universities across the country have lost millions of dollars due to fraud each year. As a member of the university community, understanding the risks of fraud and how to prevent it will help you minimize the risks of fraud occurring at UT Dallas. (Instructor: Toni Stephens, Chief Audit Executive)
- **Intro to E-Procurement (1/2 Credit) (February 9)**  
This training will walk you through the basics of eProcurement such as, editing your profile, building different types of requisitions, and how to use the search function to pull reports. \*Please note, this is a beginner's course, created for new staff members and those who are new to this job function. (Instructor: Scott Crues, Central Business Office Finance Operations Coordinator and Fatema Syeda, Central Business Office Business Administrator)
- **Intro to E-Pars (1/2 Credit) (February 11)**  
This training will walk you through the basics of ePARs, including the creation and submission of different types of ePARs and ways to search for ePARs. \*Please note, this is a beginner's course, created for new staff members and those who are new to this job function. (Instructor: Scott Crues, Central Business Office Finance Operations Coordinator and Fatema Syeda, Central Business Office Business Administrator)
- **E-Procurement and Purchasing Essentials (1 Credits) (January 22 or February 22)**  
Join us for an overview of E-Procurement and Purchasing Essentials. This course will provide training and information on a wealth of procurement topics, including purchasing methods, finding suppliers, encumbrances, promotional vendors, forms, and much more. (Instructor: Lori Matthews, Procurement Management- Purchasing Director)
- **EAJ- How and When to complete a Sole Source Form (1/2 Credit) (January 25 or February 12)**  
Many of us are not clear and when and how to use of a Sole Source Form. Attend this class to get clarification on the forms use and how we can apply its use. (Instructor: Lori Matthews, Procurement Management- Purchasing Director)
- **One Card Fundamentals – Cardholder (1/2 Credit) (January 26 or February 17)**  
This class will review important guidelines and best practices as it pertains to the One Card Program. We will demonstrate in Citibank how to Login, Reconcile, and print Expense Reports as a cardholder. Lastly, we will go over how to upload your documents to Box.com. (Instructor: Callie Speaks, Procurement Management- Travel and One Card Coordinator)

- **RFS – Request for Solicitation: (½ Credit) (January 29 or February 26)**  
This class aims to help participants better understand the Request for Solicitation form, including when to use it and how to correctly complete and submit the form.
- **RFP- How and When to Complete a Formal Bid Request (1/2 Credit) (TBA)**  
This class will discuss the how and when a Formal Bid Request should be used. (Instructor: Lori Matthews, Procurement Management- Purchasing Director)
- **Working with Independent Contractors (1/2 Credit) (TBA)**  
Do you work with vendors not affiliated with UTD and struggle with the form used to pay them? Join us for this brief class that will review the policies, procedures, and forms associated with Independent Contractors. (Instructor: Jene Janich, Procurement Management- Travel and One Card Director)
- **Accounts Payable in eProcurement (1/2 Credit) (TBA)**  
Join us for this brief class to learn more about the end process in Accounts Payable, including how to find out if your invoice has been paid as well as what all the matching, over-received, and not matched flags mean. (Instructor: Jene Janich, Procurement Management- Travel and One Card Director)
- **Account Reconciliation (TBA)** - this class is offered under Financial Management in LEO
- **PeopleSoft University (ongoing)** (If you have completed PeopleSoft University within the past three years, you will receive two credits.)

#### ***Human Resources Classes***

- **HR Hiring (TBA)**
- **HR Employee Relations (TBA)**
- **HR Benefits and Leave (TBA)**

**D) Technology Classes:** In the past, UTD’s Office of Information Technology has offered special classes to help individuals develop their software skills, particularly in Microsoft Office products. These classes are no longer offered by OIT. If you have taken any of these classes in the last two years, you will receive credit toward your achievement level. **(Note: Credit is not given for basic Oracle, Orion, or PeopleSoft training.)**

On the other hand, UTD has two great avenues for taking these classes online. One is through **Skillsoft** and the other is through **LinkedIn Learning**. Anyone who takes online classes for Microsoft Office or other software used at UTD via Skillsoft or LinkedIn Learning will receive one credit for every two hours of online class time completed. Both Skillsoft and LinkedIn Learning classes provide a certificate when participants successfully complete the class. We will give credit once an electronic copy of the certificate is emailed to us and the class is recorded in LEO under your Professional Training Summary. Additionally, classes taken outside the university or through other vendors will be reviewed for credit on a case-by-case basis.