


Covers budget and fund information for departments and principal investigators at UNC Charlotte.

Covers research projects members are involved with and sponsor information for these projects at UNC Charlotte.

Covers personal and work information for appointments at UNC Charlotte. General information on members and any fixed assets they own.

Covers reports that's can be generated to document the information on budgets, funds, departments and projects.

It is important to exit SAM correctly **USING THIS BUTTON.** Failure to do so may cause you extended loss of access to SAM.

Click  to save the record you are working on.

Click "Esc" to exit a record without saving changes.

View information on specific members in SAM, a picture may be included. Work, Personal, Pay, Project, and Fixed Assets information can also be found.

View information on specific assets including their owner, asset tag#, Serial#, Description, and Purchase Order#. The location and custodian of individual assets can be changed here.

Members Form

Member Fixed Assets

Allows you to view all budget transactions. The system allows you to see what has been paid and what is outstanding at UNC Charlotte.

Budget Transactions

Budget Setup

Fund Setup

Allows you to create and maintain a fund in SAM. Fund#, Start Date, End Date, and the name of fund are included. Information about the fund is also included for existing funds.

Allows you to start a new budget. Sponsor Funds and Cost Share Funds can be assigned beginning balance amounts. Linked to fund number and account code.

Common Account Code Pools

<u>Pool Name</u>	<u>Pool Number</u>	<u>Pool Name</u>	<u>Pool Number</u>
Overtime Pool	914000	Fixed Purchase Services Pool	927000
Student Temporary Wage Pool	915000	Other Purchased Services Pool	928000
Worker Compensation Pool	916000	Supplies Pool	930000
Medical Insurance Pool	917000	Office Equipment Pool	940000
Optional Retirement Pool	918000	EDP Equipment Pool	942000
Personal Service Contracts Pool	920000	Educational Equipment Pool	944000
Misc Employee Benefits Pool	924000	Motor Vehicle Pool	946000
Domestic Travel Pool	925000	Other Admin Expenses Pool	951000
Foreign Travel Pool	926000	Fixed Charge Pool	952000

Advanced Budget Transactions Report

The "Advanced Budget Transactions Report" shows you more details about the transactions in a particular fund. Choose this if you want to view a report about fund transactions with an emphasis on particular details (e.g., choosing to display it by department code and category).

 Advanced Fund Summary Report

The advanced fund summary shows you more detail about a fund. This report allows you to look at specific funds and view information about a specific detail across many funds.

 Fund Detailed Transactions

The "Fund Detail Report" shows you the transactions in a chosen fund. Choose this if you want to view a report about detailed fund transactions with or without Personnel Costs. Personal costs include any additional person costs.

 Fund Summary

The "Fund Summary Report" compares the totals in SAM and Banner for a fund. Choose this if you want to compare expended, encumbered, and obligated amounts, as well as the final balance, for a fund between SAM and Banner.

 Fund Summary Rollup Report

The "Fund Summary Rollup Report" shows you the all funds in a department or college, grouped by department. Choose this if you want to view a department's funds' adjusted budget; expended, encumbered, and obligated amounts; and the final balance in both SAM and Banner.

 Cost Share

The cost share report shows what projects have two or more contributors to its supporting fund. The portion of each entity's contribution is displayed.

Common Account Codes

<u>Account Name</u>	<u>Account Number</u>	<u>Account Name</u>	<u>Account Number</u>
Educational Supplies/Materials	930250	Out of State Transportation Ground	925300
Office Supplies	931100	Non-Educational Miscellaneous	932300
Postage	928040	Out of State Subsistence-Lodging	925340
Local Telephone Service	928010	EPA Student Non-Teaching Salaries	911250
Long Distance Telephone Service	928030	Out of State Other/Tip/Etc.	925380
Contract Service-Special Food Service Event	922150	Benefits Clearing	919275
Instate Transportation-Ground	925140	Other Educational Awards	960550
Other Current Services	951760	Instate Transportation-Air	925120
Indirect Overhead Costs	953050	Out of State Registration	925400
EPA Permanent Teaching Salaries	913100	NSF Participation Stipend	921170
Motor Vehicle Supplies-Other	931050	EPA Non Teach SUMMER / SP Pmt	911300
Out of State Transportation-Air	925280	Communication-Cell Phone Services	928110
Out of State Subsistence Meals	925360	L/Tch Science Lab Equip Non-Cap	944010
PC/Printer Equipment Non-Cap	942220	Repairs/Maintenance-Buildings	928180
Printing and Binding	928170	Research Subcontract	921300