



UNC Wilmington

# Finance Training Program



# Finance Training Program

- Finance Training Committee
  - Established in early 2008
  - Develop a unified finance training program
  - Committee members
    - Julia Dudley, Accounting
    - Cindy Hucks, Budget Office
    - Starkey McGowan, Purchasing
    - Susan Thornhill, Student Accounts
    - Donna Budd, Training Coordinator
    - Diana Rivenbark, Chair

# Finance Training Program

- Committee recognized that:
  - Employees need strong knowledge base of processes and procedures
  - As new technology is added, employees need to know how to utilize the systems
  - Efficient and accurate financial processing is contingent on an employee's ability to understand and use these processes, procedures and systems
  - There are specific training needs for different users of the finance processes and systems
    - Two unique finance training programs were needed

# Finance Training Program

- **Finance Training for Management/Faculty**
  - training courses are designed to give a high level understanding of the subject.
  - Designed with an “If You Need to ...Then Register for...” course structure

If you...	Register for ...	Course #
Need to understand how the university receives and distributes new funding	-Understanding the UNCW Budget System -The Money Flow	BGT202 BGT305
Need to learn departmental procurement, including P-Card, and fixed asset responsibilities	-P-Card Basics -Equipment Tracking -Purchasing Policies for Mgmt	PUR202 PUR303 PUR401

# Finance Training Program

- **Finance Certificate Training Program**
  - Places a strong emphasis on the training needs of the administrative support staff
  - Includes three progressive proficiency certificate levels
  - Courses range from broad overview to detailed step-by-step instruction

# Finance Training Program

- **Finance Certificate Training Program**
  - Finance Level One
    - Introductory courses for all areas of finance

## **Level One Finance Certificate**

BAN101 Banner Navigation  
FIN101 Finance Orientation  
ACT101 Intro to Accounting  
ACT102 AP-Paying the Bill  
ACT103 Intro to UNCW Travel  
ACT104 General and Trust Funds  
*and/or*  
CGT101 Intro to Contract & Grant Funds  
BGT101 Intro to Budgets  
PUR101 Purchasing Processes I  
RCT101 Petty Cash Requests  
FIN102 Year End Processing  
\* Intro to Excel

# Finance Training Program

- **Finance Certificate Training Program**
  - Finance Level Two
    - In-Depth and “Hands On” courses

## Level Two Finance Certificate

BAN201	Requisition Create
BAN202	Managing Funds
BGT201	Banner Budget Revisions
BGT202	Understanding the UNCW Budget System
PUR201	Purchasing Processes II
ACT201	UNCW Employee Travel
ACT202	Using UNCW E-Travel
BGT203	Banner Budget Request System
CGT201	Using Banner to View Contract & Grant Funds
*RCT201	Deposit Transmittals
**PUR202	P-Card for Cardholders
<i>and/or</i>	
**PUR203	P-Card for Card Coordinators
**PUR204	P-Card for Budget Authorities

# Finance Training Program

- **Finance Certificate Training Program**
  - Finance Level Three
    - Advanced courses

## **Level Three Finance Certificate**

ACT301	Journal Entries
ACT302	Understanding Interdepartmental Transactions
ACT303	Non-Employee & Student Travel
BGT301	Receipt Supported Budgets
BGT302	General Funds Budgets
BGT305	The Money Flow
PUR301	Independent Contractor Procedures
PUR302	Fixed Assets/Equipment Tracking
BAN301	Banner Req/PO Query Forms
CGT301	Managing Your Contract & Grant Funds
*BGT303	Banner Position Control
*BGT304	Personnel Budgets



# Finance Training Program

- **Finance Certificate Training Program**
  - Certificates will be awarded after **successful completion** of all the required courses in a certificate level
    - Attend the course and obtain an 80% passing grade on the course quiz
    - Test out of the course
  - Finance courses are open to all UNCW employees
    - For those not interested in earning a certificate, testing will be waived

# Finance Training Program

- **Finance Certificate Training Program**
  - Average course length is 2 hours
  - Courses are offered on different frequencies based upon need
  - Many courses have prerequisites
  - Also have courses that are available on an “as needed” or “as requested” basis
    - FIN103 One-on-One Training
    - FIN104 Departmental Finance Overview
    - Contact the Finance Training Coordinator to schedule these courses

# Finance Training Program

- **Finance Certificate Training Program**
  - **Course Schedule**
    - **October 13 – December 21, 2008**
      - **Fifty-five finance courses**
        - » **Calendar accommodates prerequisites**
      - **7 TESTOUT (one hour) sessions**
        - » **Can take a maximum of 2 tests in a one hour TESTOUT session.**
      - **Session dates/times can be found in**
        - » **Remedy**
        - » **Finance Training Website – click on Training Calendar link**

# Finance Training Program

- **Finance Certificate Training Program**

- **Course Registration**

- **Remedy (<http://remedy.uncw.edu>)**

- **ITSD Workshop Enrollment System**

- **Finance Course Category Selections**

- » **Finance Level 1 (all level one sessions)**

- » **Finance Level 2 (all level two sessions)**

- » **Finance Level 3 (all level three sessions)**

- » **Finance Non-Certificate (Finance electives, TESTOUT and P-Card sessions)**

- » **Office Applications (Excel session)**

- **Training materials will be provided at each session**

- **Added to the Finance Training webpage in the very near future**

- ***Registration will be open for finance classes on Monday, October 6, 2008.***

# Finance Training Program

- **Finance Certificate Training Program**
  - **Course Status**
    - **Track course status**
      - **Enrolled (registered for session)**
      - **Attended and Complete**
        - » **Session attended and test passed**
      - **On-line Complete**
        - » **Skillport courses**
        - » **TESTOUT courses will reflect this status**
    - **Track Certification Level Fulfillment**
    - **Future release of reporting specifications**
      - See Finance Training website

# Finance Training Program



UNCW SQL Server Reporting Services-Test Server

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## Training History

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## Training Status for Carole D Wilson

Level 1 Finance Certificate - Incomplete	Last Status	Status Date
ACT101 - Introduction to Accounting	Attended and Completed	10/1/2008
ACT102 - AP-Paying the Bills	Attended and Completed	10/1/2008
ACT103 - Introduction to UNCW Travel	Attended and Completed	10/1/2008
BGT101 - Introduction to Budgets	Attended and Completed	10/1/2008
CGT101 - Intro to Contract & Grant Funds	Enrolled	10/1/2008
FIN101 - Finance Orientation	Online Complete	10/1/2008
FIN102 - Year End Processing	Online Complete	10/1/2008
PUR101 - Purchasing Processes I	Attended and Completed	10/1/2008
BAN101 - Banner Navigation	Online Complete	10/1/2008
Introduction to Excel	Attended and Completed	10/1/2008

# Finance Training Program

## Helpful Resources

- **Websites**
  - Finance Training <http://www.uncw.edu/ba/finance/financetraining>
  - Remedy <http://remedy.uncw.edu>
  - Status Tracking (to be announced - refer to Finance Training webpage)
- **Finance Training Coordinator**
  - Phone: 962-2773
- **Other**
  - Diana Rivenbark, Financial Systems
    - Phone: 962-7384
    - Email: [bellamyd@uncw.edu](mailto:bellamyd@uncw.edu)