# University of Virginia Finance Training

2017-2018 Curriculum

Overview

The Finance Literacy project launched a series of courses to help advance financial literacy across campus by building upon the knowledge, skills, and abilities of our finance professionals. These sessions created an environment for learning and collaboration and acted as a conduit for leaders and subject matter experts to disseminate current thinking and topics that were unavailable in traditional learning and development outlets.

Finance Literacy Courses

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| Course Title | Course Details |
| Basics of Internal Controls | What are internal controls and why are they important? How do we ensure our controls are functioning as intended? Why is this important to you as an employee of the University? We will discuss internal controls, what the Internal Control Questionnaire (ICQ) is, and our responsibilities for state mandated ARMICS requirements. |
| [ExpenseUVA Fiscal Approver: Understanding Your Role](https://is.admin.virginia.edu/OA_HTML/RF.jsp?function_id=1013519&resp_id=-1&resp_appl_id=-1&security_group_id=0&lang_code=US&oas=BhrnOVCZ5ufTmWjYQIkZqg..&params=wmJ7q1-Hr5XPH1W.dWtWg.Edj13DDQx2QuSpi037dIYO7R7nR9GTKIJ.XGJBLS6NB-bLkENl8f0IjNIJhtR5lQ) | As a Fiscal Approver, you are responsible for reviewing expense reports submitted by Expense Owners or Delegates in ExpenseUVA. In this session you will learn about the importance of your role in ensuring expenses are properly classified to the correct PTAEO, are in compliance with University policies, and are adequately documented with justifications and receipts. |
| [ExpenseUVA: Managing T&E Card Transactions](https://is.admin.virginia.edu/OA_HTML/RF.jsp?function_id=1013519&resp_id=-1&resp_appl_id=-1&security_group_id=0&lang_code=US&oas=BhrnOVCZ5ufTmWjYQIkZqg..&params=1t2H.0NEUJkEOshAw.zWOlIkhYi.SmBe5IJ5rlY-2hnegjOgRqfzK7T3cyNd8EbXHucieKObMa1z7RMPe2i3kA) | With the transition to ExpenseUVA, the process for reconciling T&E Card transactions has changed. In this session you will learn how transactions are loaded into ExpenseUVA, how to create expense report headers, upload and manage receipts, merge transactions, move transactions to expense reports, and best practices for managing T&E Card transactions. This session will provide a general overview of the T&E Card reconciliation, and a demo of managing transactions. For hands-on help, please enroll in an ExpenseUVA lab. |
| [ExpenseUVA: Online Training](https://is.admin.virginia.edu/OA_HTML/RF.jsp?function_id=1013519&resp_id=-1&resp_appl_id=-1&security_group_id=0&lang_code=US&oas=BhrnOVCZ5ufTmWjYQIkZqg..&params=i.OWm2sNCHL7x3iWPQIswAtxVJBXJzNgRIjFnfl4LwAO7R7nR9GTKIJ.XGJBLS6NB-bLkENl8f0IjNIJhtR5lQ) | This training is for individuals who are Expense Owners/Delegates, Fiscal Approvers, Expense Approvers, and/or Supplemental Approvers who will be using the Chrome River system to manage UVA expenses. |
| Finance Fundamentals | What is UVA’s mission? What is the Code of Ethics and why is it important? What is the organizational structure of UVA and where do you fit in? What is a PTAEO? What are the sources of revenue at UVA and how are funds processed? What do you need to know about internal controls, and what are some best practices to follow? In this class you will get answers to these questions and more, as well as have an opportunity to interact and network with other administrative professionals. This class is a required course for access to the finance applications in the Integrated System, but is also open to anyone who wants to learn about UVA’s financial operations.  |
| Foreign Corrupt Practices Act | This online training module is designed to help you understand the Foreign Corrupt Practices Act and its implications for you here at UVA. |
| Lean Fluency | When you hear people talk about "Lean" and think they are speaking a different language, you are not alone. Lean Fluency will help you understand the terminology and fundamental concepts around the Lean approach to process improvement. This workshop will familiarize you with the basics of Lean principles, vocabulary, and tools. |
| Managing Salaries/Wages Charge to Sponsored Activities | More than 20% of the University's revenue comes from external sponsors in the form of grants and contracts. Anyone who schedules salary and wages charged to grants in the Integrated System Labor Distribution (LD) module needs to understand that the rules for grant funds are very different than those for other funding sources such as state funds. LD scheduling impacts a whole host of reporting and compliance requirements, and failure to do it correctly can have serious financial consequences for the institution. This training session covers everything you need to know to ensure that salaries are charged correctly and compliantly. |
| PCI Coordinator Training | Payment Card Industries (PCI) Coordinator Training is an instructor-led class and is required training for those appointed to be their area’s PCI Coordinator. In this class, you will learn about the various ways we process credit cards at the University, the PCI Data Security Standard, and your role as a PCI Coordinator. This class is usually held twice a year, and PCI Coordinators are contacted by UVAFinance to enroll. |
| PO Shopper’s Guide to Finance Fundamentals | This is an online version of the course, Finance Fundamentals at UVA, covering the same material, including information on procurement systems and policies, but in a condensed, online format. Anyone is welcome to take the class, but it is specifcally targeted to employees seeking PO Shopper responsibilities (required for PO Shopper>$1 and strongly recommended for PO Shopper-$1). Individuals requesting Viewer responsibilities will also find this content helpful. Description: What is UVA's mission? What is the Code of Ethics and why is it important? What is the organizational structure of UVA and where do you fit in? What is a PTAEO? What are the sources of revenue at UVA and how are funds processed? What do you need to know about internal controls, and what are some best practices to follow? In this online class, you will get answers to these questions and more.  |
| Reconciling Expenditures in Recon@UVA | All departments spend money, whether it is for office supplies, equipment, or personnel. It is important to reconcile these purchases each month to maintain strong internal control standards. This course is designed to help UVA staff and faculty who prepare, review and approve expenditure reconciliations navigate these processes in the Recon@UVA system. We will discuss how to accurately complete monthly expenditure reconciliations for transactions that occur in the Integrated System’s Grants Management (GM) module in compliance with UVA policy and procedures. |
| Reconciling General Ledger Revenue | To maintain strong Internal Control standards, it is important to reconcile your revenue accounts as well as your expenditure accounts. This course is designed to help UVA staff and faculty who prepare, review, and approve revenue reconciliations navigate the General Ledger (GL) revenue reconciliation process at UVA using University Business Intelligence (UBI). We will discuss how accurately complete your monthly revenue reconciliations in compliance with UVA policy and procedures. |
| Reconciling General Ledger Revenue: Lab | Do you need help with the new Monthly GL Reconciliation Procedure? During this lab, you will be able to log into UBI and complete your monthly revenue reconciliation with help from the UVAFinance team. IMPORTANT: This is a lab where you can bring your work with you to get help in completing your revenue reconciliations using the new procedure. It is not intended to replace the instructor-led, Reconciling General Ledger Revenue class where you learn about policy and procedure. |
| TravelUVA: Lab | Do you need help with Concur, UVA’s travel booking system? During this lab, you will see a demo of the system, be able to practice, ask questions, and log into the live system and book upcoming travel with the help of travel experts from UVAFinance. |
| Introduction to UBI | This online course provides an introduction to navigation and functions within the University Business Intelligence (UBI) reporting tool. Additionally, it will introduce some basic data governance and data analytics concepts. The course includes a series of hands-on exercises. This course is required for approval of the EDW\_P\_Finance responsibility requested in ESHARP to gain access to UBI Finance modules. |