

## Onboarding: Financial Administrator Checklist

Please complete within 1 month of start date

### Finance Introduction

Associate Director Finance, 30 minutes

Training Topics	Key Terms, Account Codes, Resources and Reference
Next Steps	<ul style="list-style-type: none"><li><input type="checkbox"/> Complete P-card application (if necessary)</li><li><input type="checkbox"/> Complete Travel Card application (if necessary)</li><li><input type="checkbox"/> Schedule remaining trainings</li></ul>

### Procurement and Payment

Sr. Accounts Coordinator, 1 hour

Training Topics	Procurement, Payment Method, Shopping carts, Disbursements, ISR, FSR
Before Training	<ul style="list-style-type: none"><li><input type="checkbox"/> Visit <a href="http://bu.edu/sourcing">bu.edu/sourcing</a> and watch shopping cart training videos</li><li><input type="checkbox"/> Request FSR account</li><li><input type="checkbox"/> Review ISR and FSR directions</li></ul>
Next Steps	<ul style="list-style-type: none"><li><input type="checkbox"/> Create a shopping cart to order business cards or office supplies</li><li><input type="checkbox"/> Register for a BUWorks shopping cart training</li></ul>

### Budget Tracking Training

Budget and Grants Administrator, 1 hour

Training Topics	Budget Tracking spreadsheet, BW Reports
Before Training	<ul style="list-style-type: none"><li><input type="checkbox"/> Meet with supervisor and/or department head to discuss department finances</li><li><input type="checkbox"/> Watch Budget Tracking training videos</li><li><input type="checkbox"/> Watch BUWorks Reporting training videos</li></ul>
Next Steps	<ul style="list-style-type: none"><li><input type="checkbox"/> Register for a BUWorks "Intro to Funds Management Reporting" training</li></ul>

### Travel and Expense Reports

Associate Director Finance, 30 minutes

Training Topics	Travel card, Concur, Expense Reports
Before Training	<ul style="list-style-type: none"><li><input type="checkbox"/> Watch Concur training videos</li><li><input type="checkbox"/> Visit <a href="http://bu.edu/travelservices">bu.edu/travelservices</a> and review Policies and Training guides</li><li><input type="checkbox"/> Download Concur app</li></ul>

For links, videos, and reference materials, please see the "Finance Onboarding" section on the Admin Toolkit <http://questromworld.bu.edu/administrator-toolkit/>