

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"><input type="checkbox"/> Complete P-card application (if necessary)<input type="checkbox"/> Complete Travel Card application (if necessary)<input type="checkbox"/> Schedule remaining trainings

Procurement and Payment

Sr. Accounts Coordinator, 1 hour

Training Topics	Procurement, Payment Method, Guided Buying PR's, Disbursements, ISR, FSR
Before Training	<ul style="list-style-type: none"><input type="checkbox"/> Visit bu.edu/sourcing and watch Guided Buying training videos<input type="checkbox"/> Request FSR account<input type="checkbox"/> Review ISR and FSR directions
Next Steps	<ul style="list-style-type: none"><input type="checkbox"/> Create a Purchase Requisition to order business cards or office supplies<input type="checkbox"/> Register for Guided Buying training

Budget Tracking Training

Budget and Grants Administrator, 1 hour

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

Travel and Expense Reports

Associate Director Finance, 30 minutes

Training Topics	Travel card, Concur, Expense Reports
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Before Training	<ul style="list-style-type: none"><li data-bbox="402 205 802 233">❑ Watch Concur training videos<li data-bbox="402 264 1235 291">❑ Visit bu.edu/travelservices and review Policies and Training guides<li data-bbox="402 323 716 350">❑ Download Concur app
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For links, videos, and reference materials, please see the "Finance Onboarding" section on the Admin Toolkit <http://questromworld.bu.edu/administrator-toolkit/>