

## 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	<input type="checkbox"/> Complete P-card application (if applicable) <input type="checkbox"/> Complete Travel Card application (if applicable) <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	<input type="checkbox"/> Visit <a href="#">Sourcing's website</a> and watch training videos for Catalog Orders and Amount Based or Standard PR's <input type="checkbox"/> Request FSR account <input type="checkbox"/> Review ISR and FSR directions
Next Steps	<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

Associate Director Finance, 45 minutes

Training Topics	Budget Tracking spreadsheet, BW Reports
Before Training	<input type="checkbox"/> Meet with supervisor and/or department head to discuss department finances <input type="checkbox"/> Watch BUWorks Reporting training videos
Next Steps	<input type="checkbox"/> Register for a BUWorks "Intro to Funds Management Reporting" training

### Travel and Expense Reports

Associate Director Finance, 45 minutes

Training Topics	Travel card, Concur, Expense Reports
Before Training	<input type="checkbox"/> Watch Concur training videos <input type="checkbox"/> Visit <a href="http://bu.edu/travelservices">bu.edu/travelservices</a> and review Policies and Training guides <input type="checkbox"/> Download Concur app

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