

New Employee Training & Refresher Course

The Purchasing & Contracts Office in conjunction with other areas in Finance & Administration are launching a new training initiative focused on new employees as well as those existing employees that would like a reminder of existing policies, procedures, and tips and tricks for interacting with Finance & Administration. Our first session will be February 14th and 21st in Columbine B at the University Center.

The February 14th training, will offer a high level overview of the following topics: IT access and the Technical Support Center, Facilities service requests and vehicle checkout, budgets, FOAPs, approver responsibilities, Purchasing policies and procedures, Accounts Payable policies and procedures, journal entries, procedures for hiring new staff, scheduling on campus events and the UNC ID Card. The target audience for the February 14th event is any new or existing employee that interacts with Finance & Administration, including but not limited to FOAP approvers, Department Chairs, Deans, AVP's, Directors, Business Managers, Program Managers, and Admin Assistants. These will be quick overview sessions, each lasting only about 15 minutes. The event will run 8:30 – noon.

The February 21st training will be a more in-depth training covering cyber security, Information Management Systems (such as Office 365 and Skype), Institutional Reporting, Purchasing procedures, Accounts Payable procedures, and Contracting on behalf of the University. The first half of this training is targeted to the same attendees as the first day. The second half is targeted to folks such as Business Managers, Administrative Assistants, Accounting Techs, and Program Assistants, however, anyone that is interested in learning about these topics is encouraged to attend. Each session will run approximately 30 minutes. The event will be 8:30 – 12:30 (with a break after the IM&T session at approximately 10:05).

The tentative agenda for both days is below. Since space is limited, we ask that you register for each session (Day 1 Session, Day 2 IM&T Session, Day 2, Institutional Reporting Session, Day 2 Purchasing & Contracts Session – which includes Accounts Payable, or the entire Day 2 Session). You can register for each session by emailing Purchasing@unco.edu.

This training will be offered again on May 16th and 23rd, August 1st and 8th, and November 14th and 28th (2019 dates will be published in the Fall semester).

Day 1		
Time	Department	Topic
8:30 - 8:45	Purchasing & Contracts	Introduction and Overview of Day 1
8:45 - 9:00	IM&T	IM&T Support Overview
9:00-9:15	Facilities	Service Requests, Door Access and Vehicle Check Out
9:15 - 9:30	Financial Services	Budget
9:30 - 9:45	Financial Services	FOAPS and other Accounting Information (General Accounting)
9:45 - 10:00	Financial Services	Approver Responsibilities (General Accounting)
10:00 - 10:15		Break
10:15 - 10:30	Purchasing & Contracts	Purchasing policies and procedures (including grants and contracts)
10:30 - 10:45	Purchasing & Contracts	Accounts Payable, Pcards and Travel
10:45 - 11:00	Financial Services	Journal Entries (General Accounting)
11:00 - 11:15	HR & Payroll	How to hire faculty & staff (both exempt and classified)
11:15 - 11:30	Conference Services	How to schedule an event or conference

11:30 - 11:45	Purchasing & Contracts	UNC ID Card
11:45 - 12:00	Purchasing & Contracts	Wrap Up and Discussion of Day 2

Day 2		
Time	Department	Topic
8:30 - 8:35	IM&T	Introduction and Overview of Day 2
8:35 - 9:05	IM&T	IM&T Portal, Access and Training
9:05 - 9:35	IM&T	Productive and Efficiency Tools (Office 365)
9:35 - 10:05	IM&T	Cyber Security
10:05 - 10:15		Break
10:15 - 10:45	IRAS	Reporting
10:45 - 11:15	Purchasing & Contracts	Purchasing Processes: Requisition, Encumbrance Requirements, Sole Source and Bid Procedures
11:15 - 11:45	Purchasing & Contracts	Accounts Payable Processes: Xtender, Pcards Imaging, Travel, Independent Contractors
11:45 - 12:15	Purchasing & Contracts	Contracts: Contracting and the Use of OnBase
12:15 - 12:20	Purchasing & Contracts	Wrap Up