Access to University of Minnesota financial systems requires completion of online or instructor-led courses. Enroll in courses via Training Hub (training.umn.edu). Work with your supervisor to identify the required training for your role within your unit. All Financial Training courses are housed under Controller's Office.

### Core Financial
- **EFS**
  - FIN099 - Chart of Accounts Overview
  - FIN101 - Basic Accounting
  - FIN102 - Basic Accounting II
  - FIN103 - Chart of Accounts*
  - FIN105 - Chart of Accounts Assessment
  - FIN107 - ChartField Request
  - FIN119 - Endowments
  - FIN401 - Financial Management Orientation

### Budgeting
- **EFS**
  - FIN501 - Budget Journals
  - FIN502 - Budget Journals Upload Process
  - FIN504 - Detailed Budget Entry
  - FIN505 - Position Budgeting
  - FIN506 - RRC Manager Designee Budget Entry
  - FIN507 - Budget Entry Train the Trainer*
  - FIN508 - Budget Entry*

### Procurement & Accounts Payable
- **EFS (Procurement)**
  - FIN201 - Purchasing Goods and Services
  - FIN202 - Using the University PCard
  - FIN203 - U Market Only Access for Requesters
  - FIN204 - Receiving Purchases
  - FIN218 - Create Requisitions*
  - FIN207 - Create Requisitions Assessment
  - FIN208 - Manage Requisitions
  - FIN209 - My Wallet for Cardholders
  - FIN211 - Procurement Process Overview
  - FIN219 - Procurement Specialist*
  - FIN212 - Procurement Specialist Assessment
  - FIN214 - Roles in the Procurement Process
  - FIN215 - Supplier Inquiry
  - FIN225 - Reconciling PCard Purchases

- **EFS (Accounts Payable)**
  - FIN115 - Voucher Entry*
  - FIN112 - Voucher Entry Assessment

### Billing & Accounts Receivable
- **EFS**
  - FIN302 - Customer Information Overview
  - FIN303 - Accounts Receivable Inquiry
  - FIN304 - Accounts Receivable Monitoring
  - FIN305 - Departmental Deposits
  - FIN306 - Bank Card Reconciliation
  - FIN309 - Create Bills*
  - FIN301 - Create Bills Assessment

### COMPLIANCE
- **FIN901 - Payment Card Manager Refresher Training**
- **FIN902 - New Payment Card Manager Training**
- **FIN903 - Payment Card Employee Security Awareness Training**
- **FIN904 - Payment Card Self-Assessment Questionnaire (SAQ) Workshop**
- **FIN908 - Red Flags Rule**
- **FIN909 - Gramm-Leach-Bliley Act (GLBA)**
### Finance Course Catalog FY2020 (cont.)

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### Key
- **EFS** = Enterprise Financial System
- **HRMS** = Human Resources Management System

### System Access
An Access Request Form is required for Enterprise Financial System access. See [z.umn.edu/efsarf](http://z.umn.edu/efsarf)

### Course Delivery
*Instructor-led
**Instructor-led or online
All other courses online.

### Enrollment Unavailable?
Verify course prerequisites have been completed. If completed prior to June 2018, contact the Financial Helpline for enrollment assistance.

Controller's Office | Financial Training
controller.umn.edu/training
Financial Helpline: 612-624-1617 or controller@umn.edu

5/13/20