

FINANCIAL MANAGEMENT AND FINANCIAL SYSTEMS

REGISTRATION

This page provides an overview of CWD courses.

To register, visit the [Harvard Training Portal](#) and sign in using your HarvardKey.

There you will also find detailed descriptions and any pre-course requirements.

If you are interested in taking a course, please consult with your manager before registering.

LYNDA.COM

Lynda.com is an online training site with over 4,000 classes on Microsoft and Adobe products, business skills, web design, computer programming, audio and video tools, and much more.

Lynda is available free of charge to Harvard staff, faculty, and students. For details, go to:

<http://lynda.harvard.edu>.

Financial Mangement

Advanced Harvard Accounting

In this interactive workshop, participants will learn about accounting that is unique to Harvard and nonprofit organizations, along with its application to their daily work. Exercises and case examples will present accounting principles and underscore the importance of promoting an accurate accounting environment consistent with the University's values and objectives. Requires participation in two half-day sessions. Note: This course is for individuals working in the tub finance offices, Financial Administration, and other areas of Central Administration.

Cost: \$0

Basics of Accounting

This course reviews the basics of accounting, including accounting equations, debits and credits, accrual accounting, and fund accounting. Time will also be dedicated to Harvard-specific accounting for internal transfers and billings, and the specific types of funds that comprise Harvard's net assets.

Cost: \$0

Chart of Accounts

This introductory class provides an understanding of Harvard's Chart of Accounts (CoA) structure and explains the information that is captured about each financial transaction. This class is recommended for all staff who are responsible for processing, tracking, or reviewing financial transactions and it is considered a foundational class for other financial management and financial systems courses.

Cost: \$0

Ethics and Accountability

This workshop explores fiduciary responsibility and internal controls. Participants will gain a clear understanding of roles and responsibilities in protecting the University's resources while promoting an environment consistent with the University's values and objectives.

Cost: \$0



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Fraud and the Workplace

Using a combination of case studies, recent examples of fraud in higher education, and group discussion, this course seeks to raise awareness of the potential for fraud, to discuss the indicators of fraud, and to outline the steps to take if you suspect fraud.

Cost: \$0

Financial Systems

HCOM Purchasing and Receiving

This hands-on course provides training on using the Harvard Crimson Online Marketplace (HCOM) system to shop for office and lab supplies, create purchase orders for goods or services, pay invoices, create payment requests, and mark orders as received so payments can be issued. Participants must have login access to HCOM a week prior to attending this course. It is also recommended that participants take the Chart of Accounts class before attending this course.

Cost: \$0

HUBS Basic Planner

This course introduces participants to the Harvard University Budgeting System (HUBS), used by Harvard's financial planners to develop and maintain their forecast and operating budget each fiscal year. Topics include user roles; setting preferences; running and exporting reports; taking advantage of drill-down capabilities; entering budget data, comments, and supporting detail; running calculations (known as business rules); copying working budgets into drafts; and validating Chart of Accounts combinations before budget submission.

Cost: \$0

HUBS SmartView Analytics

SmartView is a platform for creating ad hoc budget reports in an Excel environment. This course covers accessing a HUBS database from an Excel worksheet; selecting specific members (e.g., tub-org, object, fund, year, etc.); retrieving budget data; arranging members on the grid; drilling down into data; and applying Excel formatting and formulas.

Cost: \$0

Introduction to the Ad Hoc Data Model

This course covers three key topics: an orientation to the Harvard Data Warehouse (HDW), the basic concepts of Harvard's data structure and data modeling, and exercises using Brio as a foundation of query development. **Participants must have** an active login to the Ad Hoc environment. Pework required.

Cost: \$0



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Oracle Business Intelligence Tools

This course is intended for people currently using CREW financial reports who will be migrated to the Oracle Business Intelligence (OBI) platform. Topics include an overview of OBI, executing a dashboard in OBI, and tips for interacting with data online, printing and exporting data. **Participants must** be designated by their Authorized Requestor as needing access to OBI before taking this course.

Cost: \$0

Processing Reimbursements

This hands-on course guides participants through the process of creating reimbursement requests for employees (using the Web Reimbursement system) and non-employees (using the HCOM system). Reimbursement policy and Corporate Card payments will also be covered. Participants must have login access to Web Reimbursement and HCOM a week prior to attending this course. It is also recommended that participants take the Chart of Accounts class before attending this course. NOTE: This course may no longer be appropriate for Schools or Units that have switched to the Concur system for processing employee reimbursements, check with your local approver before registering.

Cost: \$0

Using Accounts Receivable

For staff who use the Oracle Accounts Receivable application. Topics include customer set-up process; creating, copying and canceling invoices; using the iReceivables dashboard; balances and payment information; University policies governing receivables, collections, and bad debt; and understanding the reports available to Accounts Receivable users.

Cost: \$0