Understanding the Basics of Financial Activities at Queen’s

A series of online instructional tutorials designed to:

✓ Accommodate busy schedules
✓ Build financial skillset specific to Queen’s environment
✓ Create confidence in understanding core financial activity

Why enrol?

This user-focused certificate program is a key part of staff education and career development. The goal of the program is to provide end users and staff at different levels with a clearer understanding of the bigger picture at Queen’s. With a strong emphasis on important policies and processes, and the correct use of ChartFields, the program is designed to improve the quality, efficiency, and accuracy of the thousands of financial transactions processed by Queen’s staff every day.

What you do matters!

Learn how your activities fit in to the broader university processes. Become familiar with important policies and procedures. Learn how and where you can get help when you need it.
How it works!
1. To enrol, log in to onQ and select “Basics of Financial Activities at Queen’s”
2. Begin by selecting SERIES 1, Session 1.1 and view tutorial in any of the available formats
3. Complete Quiz for SERIES 1, Session 1.1
4. Select the next session in series and repeat process
5. Following the completion of SERIES 5, complete and submit the online Feedback form

SERIES 1 GETTING STARTED — Core
Session 1.1 Connecting You to People, Systems & Training - Making the Right Connections
Session 1.2 Queen’s General Ledger - Why ChartFields Matter
Session 1.3 Timelines & Cut-offs - Timing is Everything
Session 1.4 What Feeds into Finance PeopleSoft - A Look Behind the Scenes
Session 1.5 Maintaining a Strong Control Environment - PART 1 The Control Environment at Queen’s
Session 1.6 Maintaining a Strong Control Environment - PART 2 Roles Within the Control Environment
Session 1.7 Policies - Compliance is Golden

SERIES 2 ACCOUNTING BASICS — Core
Session 2.1 Accounting 101 - Understanding the Basics
Session 2.2 Accounts Receivable - Show Me the Money
Session 2.3 Harmonized Sales Tax (HST) - A Taxing Subject
Session 2.4 Journal Entries - PART 1 - Basics - A Balancing Act
Session 2.5 Journal Entries - PART 2 - Research - Important Tips
Session 2.6 Revenue & Cost Recoveries - Understanding the Difference
Session 2.7 Taxable vs. Non-Taxable Payments - Processing via AP vs. HR

SERIES 3 PROCUREMENT — Core
Session 3.1 Rules & Policy - Get the Goods on Purchasing Goods & Services
Session 3.2 Website & Preferred Supplier List - Helpful Resources
Session 3.3 Purchase Requisition - Understanding & Utilizing the PeopleSoft Process
Session 3.4 Purchasing With Research Funds - Before You Buy
Session 3.5 Queen’s Credit Cards - Playing the Right Card
Session 3.6 Shipping & Customs Clearance - Clear the Way
Session 3.7 Sourcing Process, Obtaining Quotes & RFx’s - Today’s Quote

SERIES 4 MANAGING SPECIFIC FUNDS — Core
Session 4.1 Research Projects - Understanding the Life Cycle
Session 4.2 Research Overhead - Understanding the Basics
Session 4.3 Research Commitments - A Look Behind this Figure
Session 4.4 Trust & Endowment - Funds that Begin with 5, 6, 7, 8

SERIES 5 SYSTEMS TRAINING — Core (Choose 2 Electives)
Session 5.1 ERS - Introduction to the Expense Reimbursement System
Session 5.2 FAST - Introduction to the Fast Administrative Support Tool
Session 5.3 FAST - Non-Research Statement of Operations Report - PART 1 (Elective)
Session 5.4 FAST - Non-Research Statement of Operations Report - PART 2 (Elective)
Session 5.5 FAST - Research Project Summary Report (Elective)
Session 5.6 FAST - Research Statement of Operations Report (Elective)