Financial and Administrative Operations Training Series

Brooklyn College Knowledge
An introduction to Brooklyn College, including its historical and academic structure. Learn how to manage operational tasks such as how to submit facilities work requests, obtaining copiers and computers, and gaining access to college-specific systems such as the BC Portal and CUNYfirst. Ideal for new hires as well as staff members needing a refresher.

Location: Woody Tanger Auditorium
Instructor(s): Patrick O’Connor, Beatrice Tony-Jean

Budget Basics
An overview of Tax-Levy budget units and accounts. Core concepts include budget and funding types, CUNYfirst chartfield strings, reading and understanding budget reports, and best practices and tips. Answers such questions as “What is a budget?”, “How do I check my balance?”, and “How can I request a budget transfer?”

Location: Woody Tanger Auditorium
Instructor(s): Patrick O’Connor, Michael Lanza

Introduction to Purchasing
A basic overview of the purchasing process. Core concepts include funding types, access and permissions, the eProcurement Workflow, eProcurement Notes, and best practices and tips. Answers such questions as “What is a Fiscal Year?”, “What is the difference between Tax-Levy and Non-Tax Levy?”, “What is a confirming order?”, and “How do I get access to the eProcurement module in CUNYfirst?”

Location: Woody Tanger Auditorium
Instructor(s): Patrick O’Connor, David Finkelstein

Introduction to Tax Levy Travel and Expense
A comprehensive introduction and explanation of the travel and expense process. Core concepts include the Travel and Expense Workflow, Travel Authorizations, Expense Reports, per diem and mileage rates, and meal allowance. Addresses such questions as “How do I make travel arrangements”, “What does travel status mean?”, “How do I get reimbursed?”, and “How do I get access to the Travel and Expense module in CUNYfirst?”

Location: Woody Tanger Auditorium
Instructor(s): Patrick O’Connor, Gulnoza Shakirova

CUNYfirst eProcurement Workshop, Part 1: How to Buy
A hands-on, comprehensive demonstration on the purchase requisition process in CUNYfirst. Participants will learn core skills such as how to run budget queries, create purchase requisitions, and how to track and manage requisitions using the eProcurement Notes tool. Each participant will have the opportunity to create and submit an actual requisition during the workshop and are encouraged to bring along any supporting documentation (e.g., price quotes, honorarium payment request forms) that will need to be attached to their requisition. A scanner will be provided. Access to CUNYfirst eProcurement is required.

Location: 383 Library
Instructor(s): Patrick O’Connor, David Finkelstein

CUNYfirst eProcurement Workshop, Part 2: How to Pay
A thorough overview of the receipt and payment process in CUNYfirst. Participants will learn core skills such as how to find a purchase order number and how to create receipts in CUNYfirst. Each participant will have the opportunity to create and submit a receipt during the workshop and are encouraged to bring along any packing slips and invoices that will need to be attached to their receipt. A scanner will be provided. Access to CUNYfirst eProcurement is required. If you haven’t attended the CUNYfirst eProcurement Workshop, Part 1: How to Buy workshop, familiarity with the purchasing process in CUNYfirst is strongly recommended.

Location: 383 Library
Instructor(s): Patrick O’Connor, David Finkelstein

CUNYfirst Travel and Expense Workshop
A hands-on demonstration on travel authorizations and expense reports in CUNYfirst. Participants will learn core skills such as how to create travel authorizations and expense reports in CUNYfirst. Each participant will have the opportunity to create and submit a travel authorization and expense report during the workshop and are encouraged to bring along a completed Brooklyn College Authorization to Travel Form and documentation of the purpose of travel (e.g., conference agenda, flyer, brochure, program, invitation, or conference registration form) that will need to be attached to the travel authorization/expense report. A scanner will be provided. Access to CUNYfirst Travel and Expense is required.

Location: 383 Library
Instructor(s): Patrick O’Connor, David Gretah

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Spring 2019 Available Course Offerings

**Budget Basics**
**Dates/Times:**
- February 19, 2019 (10–11:30 A.M.)
- March 13, 2019 (10–11:30 A.M.)
**Location:** Woody Tanger Auditorium
**Instructor(s):** Patrick O’Connor, Michael Lanza

**Introduction to Purchasing**
**Dates/Times:**
- February 13, 2019 (10–11:30 A.M.)
**Location:** Woody Tanger Auditorium
**Instructor(s):** Patrick O’Connor, David Finkelstein

**CUNYfirst eProcurement Workshop, Part 1: How to Buy**
**Dates/Times:**
- February 26, 2019 (10–11:30 A.M.)
- March 12, 2019 (10–11:30 A.M.)
**Location:** 383 Library
**Instructor(s):** Patrick O’Connor, David Finkelstein

**Introduction to Tax Levy Travel and Expense**
**Dates/Times:**
- February 20, 2019 (10–11:30 A.M.)
- March 21, 2019 (10–11:30 A.M.)
**Location:** Woody Tanger Auditorium
**Instructor(s):** Patrick O’Connor, Gulnoza Shakirova

**CUNYfirst Travel and Expense Workshop**
**Dates/Times:**
- March 6, 2019 (10–11:30 A.M.)
- April 10, 2019 (10 – 11:30 A.M.)
- May 7, 2019 (10 – 11:30 A.M.)
**Location:** 383 Library
**Instructor(s):** Patrick O’Connor, David Gretah

**CUNYfirst eProcurement Workshop, Part 2: How to Pay**
**Dates/Times:**
- February 27, 2019 (10–11:30 A.M.)
- March 14, 2019 (10–11:30 A.M.)
**Location:** 383 Library
**Instructor: Patrick O’Connor, Beatrice Tony-Jean

**Brooklyn College Knowledge**
**Dates/Times:**
- February 14, 2019 (10–11:30 A.M.)
**Location:** Woody Tanger Auditorium
**Instructor: Patrick O’Connor, Beatrice Tony-Jean

ENROLL NOW! RSVP!