Training Opportunities

Spring is just around the corner and it's time to spring forward on your development in 2021!

First, a few things you should know….

FAQs:

How do you search for training and enroll in courses? How do you drop a course or change your registration date? How do you view your record or transcript? Answers to these questions and others may be found on CULearn's FAQ page here: https://culearn.cornell.edu/home/faq/.

Linkedin Learning & Skillport:

Interested in topics that aren't currently being offered or expanding on a topic you recently learned in one of our programs? Don't forget these FREE platforms to expand and enhance your learning!

- Linkedin Learning: Access 16,000+ expert-led courses. Earn a certificate when you complete a course. Receive course recommendations tailored to you. View courses anytime from your computer or phone.
- Skillport: Whether you're trying to answer a question, learn a new skill, or develop professionally, Skillport lets you quickly locate learning content aligned to your needs. Find the right resources. Create a customized learning plan. Learn from your peers. Experience a learning platform that truly puts your needs front and center.

Help us:

Are you interested in providing feedback on career services and professional development opportunities for staff at Cornell? Take this short four-question survey to share your thoughts on our existing programs and tools and what we should consider as we look for ways to make our programs even better!

Feedback Survey

Upcoming Training

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Career Skills

Shall we talk? Getting the most out of performance dialogs.

Done right, performance dialogues can be a catalyst for overall performance improvement. The most effective dialogues are fact based, lead to action, offer both constructive and challenging

feedback and target the most important issues. Although most people think of performance management as a supervisor's responsibility to give feedback, you have responsibilities in this process too.

You need to:

- Continuously manage your performance and ask for feedback throughout the year;
- Demonstrate efforts to continuously develop skills;
- Assess your own performance; and
- Prepare for your performance dialogue.

Learn tips, tools and advice on how to prepare for your performance dialogue and manage your career development by attending this comprehensive program:

HR 3008 Performance Dialogue, Career Management and Preparedness

Monday, March 8; 3-4:15 pm or Friday, March 12; 1-2:15 pm

Facilitated by Tanya Grove, Sr. Management Consultant, Organizational Development & Effectiveness

HR 2031 Performance Management for Managers

Monday, March 15; 3-4:15 pm or Thursday, March 18; 9-10:15 am

As we continue to adapt to our new remote-work reality, managing remote employee's performance is a skill every manager will have to learn. Performance Management for Managers provides strategies to support your employees in our current environment. In this course you'll learn about changes to the Performance Dialogue process, how to coach for performance of remote workers by setting clear objectives and goals, scheduling regular check-ins, giving continuous feedback and trusting your employees.

Facilitated by Tanya Grove, Sr. Management Consultant, Organizational Development & Effectiveness

HR 3066 Tips for Effective Facilitation

March 31-April 1 or September 15-16; two consecutive days; 9:00-11:00 am each day

Group facilitation is an important leadership skill that can really help a team achieve their goals in the most effective and constructive manner. Hence the role of the facilitator is to help the group make progress and find their own solution in the easiest and most effective way. This 2-part course provides hints and tips to enhance your effectiveness at facilitating groups.

Facilitated by Anthony Sis, Diversity and Inclusion Training Specialist, Department of Inclusion and Workforce Diversity and Jim Sheridan, Sr. Management Consultant, Organizational Development and Effectiveness

HR 1013 Employee Engagement

May 6; 1-2:30 pm or Wed. Oct 20; 9:30-11 am

Engaged employees fully invest their best selves in the work they do. But what is employee engagement and how is it created? Employees and leaders intuitively know that when we find a place where we can throw our hearts, spirits, minds, and hands into our work, we are happier, healthier, and produce better results. Yet, most of us struggle to understand exactly why we engage in some environments and don't in others.

Facilitated by Ari Mack, Organizational Development Consultant, Organizational Development and Effectiveness

HR 3017 Leader as Coach

March 29-April 1 or November 1-4; 4 consecutive days: 8:30 am-12 pm each day

Leader as Coach focuses on the supervisor or leader as coach based on the 2002-19 Presence-Based Coaching model. After the course, you'll have access to follow-up coaching sessions providing the opportunity for skill mastery by putting all your learning and intentions into practice.

Objectives:

- Learn the principles of coaching
- Understand the importance of supervisor as coach
- Utilize a coaching model to help individuals discover their personal and professional potential
- Leverage mindful-based coaching strategies as a leader
- Develop relationship and establish trust
- Explore personal biases, cultural influences and learn to consciously coach across differences

Open to faculty, supervisors and staff who are responsible for the work of others as supervisors or project or program managers and who have attended the Faculty Leadership Program, Chair Program, Harold D. Craft Leadership Program or Turning Point as the program builds on concepts from those programs.
Facilitated by Kathryn Burkgren, Ph.D., AVP Organizational Development & Effectiveness; Tanya Grove, Sr. Management Consultant and Ari Mack, Organizational Development Consultant

Emotional Intelligence

Course 1: HR 3059 Intro to Emotional Intelligence; Sept 7; 1-3pm or Sept 10; 9:30-11:30 am

Course 2: HR 3060 Self-Perception - Self-Regard, Self-Actualization; September 13; 10:30-11:45 am or September 15; 9-10:15

Course 3: HR 3061 Self-Expression – Emotional Expression, Assertiveness, Independence; September 20; 9:30-10:45 or Sept. 23; 1-2:15

Course 4: HR 3062 Interpersonal – Interpersonal Relationships, Empathy, Social Responsibility; Sept. 28; 9:30-10:45 or Sept. 30; 1:30-2:45

Course 5: HR 3063 Decision Making – Problem Solving, Reality Testing, Impulse Control; Oct. 4; 9:30-10:45 or Oct. 8; 9:30-10:45

Course 6: HR 3064 Stress Management – Flexibility, Stress Tolerance, Optimism; Oct. 11; 9:30-10:45 or Oct. 14; 1-2:15

Course 7: HR 3065 Pulling it all Together; October 18; 9:30-11:30 or Oct. 21; 1-3 pm

Leadership at Cornell

While effective leaders have always had to inspire and execute, the ways in which we practice and demonstrate leading calls for a new approach. Today's best leaders use higher forms of motivation such as intrinsic reward, sense of belonging, understanding how people connect to the mission of the organization, influence, and even love. Successful leaders attract the best talent by bringing every individual's genius and capacities together to get results. They transform average workers into outstanding contributors. At Cornell we want leaders to focus on being conscious leaders, using emotional intelligence, unleashing the power of their teams, creating and maintain a highly functional team, seeing around corners, navigating the Work/Life journey, and coaching for performance.

This is a 7-module curriculum and it is recommended you take these courses in sequence. Courses are 1.5 – 2 hours each. All modules must be completed to receive a completion status and/or certificate for this course track.

HR 1014 Leadership@Cornell

NOTE: When you register for this curriculum, it will automatically assign you to all the next available classes**BEFORE YOU REGISTER**: be sure to VIEW CLASSES for each class and enroll for the date you want to attend.

1. Being a Conscious Leader

April 13; 9:30-11:30 am or April 14; 1:30-3:30 pm or September 8; 9:30-11:30 am or September 13; 1-3 pm
In its most simple form, conscious leadership is bringing one's whole self with total awareness to your leadership position. Conscious leaders focus on the "we" rather than the "me" and realize that their role is to create a collaborative culture of trust, care, and influence. These leaders are concerned about the overall vision, are self-motivated, and are not prone to making impulsive decisions. Conscientious leaders are concerned about getting a job done in the best way for their organization and the individuals on their team. Conscious leadership is a critical element to developing a thriving team and organization that operates from presence. Conscious leaders automatically create a reliable and robust culture of trust which has a powerful impact on morale and by extension, productivity.

2. Emotional Intelligence

April 19; 9:30-11:30 am or April 22; 1:30-3:30 pm or September 14; 1-3 pm or September 22; 9:30-11:30 am
Emotional Intelligence (EQ): The capacity to be aware of, control, guide, and express one's emotions, and to handle interpersonal relationships judiciously and empathetically. Come join us as we explore our own self-perception and expression and move through how it effects our interpersonal relationships, decision making, and stress management.

3. Unleashing the Power of Your Team

April 27; 9:30-12 or April 30; 1-3:30 pm or September 22; 1:30-4:00 pm or September 27; 9:30-12:00 pm
What does it mean to be a leader and unleash the power of your team? In this course, you will explore the behaviors and cultural issues that get in the way of leading effectively, as well as your role in creating an environment where all employees feel empowered.

4. Creating and Maintaining a Highly Functional Team

May 3; 1:30-3:30 pm or May 6; 9:30-11:30 am or September 29; 9:30-11:30 am or October 4; 1-3 pm
As a leader, managing team dynamics in a productive and meaningful way can be the key to over-all success. This course focuses on five areas that are critical to a leader's ability to keep a team moving forward. Trust, conflict, commitment, accountability, and results are everyday factors that are a part of everyone's work life. Join other leaders for small and large group discussions as we share strategies from Patrick Lencioni's "The Five Dysfunctions of a Team".

5. Seeing Around Corners

May 12; 9:30-11:30 am or May 14; 1-3 pm or October 6; 9-11 am or October 8; 1-3 pm
Looking ahead and creating an environment that encourages innovation is a valuable skill for any leader to practice. As leaders we need to pay attention to shifts in the business landscape, known as inflection points. These shifts can either create new opportunities or they can lead to devastating consequences. Leaders who can spot those inflection points, or "see around corners" early, are poised to succeed. Most shifts have subtly built over time. "Seeing Around Corners" will help you learn to leverage this concept to create a more effective, innovative, and pro-active approach to the work with which you and your team engage.

6. Navigating Your Work/Life Journey

May 17; 9:30-11 am or May 21; 9:30-11 am or October 11; 2:30-4 pm or October 15; 9:30-11 am
Work-life integration, well-being, self-care. There is a way to bring your full, healthy authentic self to work. In this session, we discuss and develop strategies that integrate a life of play, rest, and action. Create your best life by developing a plan that works for you. Learn how to disrupt conditioned patterns of work that increase you and your team's efficiency.

7. Coaching for Performance

June 1; 10-12 or June 4; 1-3 pm or October 18; 2-4 pm or October 22; 9:30-11:30 am
Do you wish that your team members came to you with a solution to the problem rather than seeking the answer? In this course, discover the power of coaching to bring out the best in your team and colleagues so you can be more agile to meet the changing needs of the organization and excel in your role and responsibilities.

Certificate Courses

The following tracks include courses that can be taken individually or receive a certificate by taking all the courses within the track. There is no required end date for completing any track – take classes at your convenience and complete in your own time!

NOTE: When you register for these tracks, it will automatically assign you to all the next available classes **BEFORE YOU REGISTER**: be sure to VIEW CLASSES for each class and enroll for the date you want to attend.

Leading in these Times

Course 1: HR 3050 The Changing Landscape of Work; Wed. March 31; 1-2:15 pm or Wed. Sept 8; 1-2:15 pm

Course 2: HR 3051 Building Connections; Mon April 5; 3-4:15 pm or Tues. Sept. 14; 9:30-10:45 am

Course 3: HR 3052 Recognizing, Developing and Moving Talent at Cornell; Thurs. April 15; 1-2:15 pm or Mon. Sept. 20; 1-2:15 pm

As a leader, it is vital to understand the ever-changing landscape of where and how we work. In this track, managers will explore relationships, strategies for effective communications, coaching for performance and development, and how to tap into employee strengths and passions.

Objectives**:**

- Understand the changing landscape of where and how we work
- Learn how to build connections, norms, and culture across the team
- Establish trust within your team
- Understand the importance of recognizing, utilizing, developing and moving talent at Cornell

Facilitated by Jim Sheridan, Sr. Management Consultant and Tanya Grove, Sr. Management Consultant

Building Trust

Course 1: HR 3053 Establishing and Maintaining Trust in Work-Groups; Tues. April 6; 9:30-10:45 am or Wed. Oct. 13; 1-2:15 pm

Course 2: HR 3054 The Value of Trust for Creating and Maintaining Belonging Thurs. April 15; 9:30-10:45 am or Wed. Oct. 20; 1-2:15 pm

As a leader, it is your responsibility to establish trust and motivate the team to create an environment that encourages collaboration and partnership between colleagues. As a member of the team, what are you doing to foster an environment where trust is co-created? In this program, we will explore:

- How to establish trust within onsite, hybrid and remote work-groups
- What actions in work lead to trust and which disrupt trust
- How teams with high levels of trust can support employee engagement and a sense of belonging

Facilitated by Jim Sheridan, Sr. Management Consultant and Tanya Grove, Sr. Management Consultant

Communications

Course 1: HR 3055 Managing and Facilitating Meetings; Tues. April 20; 10:30-11:45 am or Tues. Oct. 5; 9:30-10:45 am

Course 2: HR 3056 Effective Listening; Wed. April 28; 1:30-2:45 pm or Tues. Oct. 12; 9:30-10:45 am

Course 3: HR 3057 Giving and Receiving Effective Feedback; Wed. May 5; 1-2:15 pm or Tues. Oct. 19; 9:30-10:45 am

Course 4: HR 3058 Difficult Conversations; Fri. May 14; 9:30-10:45 am or Tues. Oct. 26; 9:30-10:45 am

As a result of this track of communicating in remote, onsite, and hybrid work environments, you will learn:

- Effective techniques for facilitating business meetings
- The importance of listening and techniques for effective listening
- Cornell's expectations on giving and receiving feedback and strategies to do that well
- How to approach and manage difficult conversations

Facilitated by Jim Sheridan, Sr. Management Consultant and Tanya Grove, Sr. Management Consultant

Accounting & Finance

The following Division of Financial Affairs (DFA) classes are available through June 2021 and are open to any person interested in learning more about Cornell accounting/finance policies. Please register via CULearn (click the registration link in the description below to view open class dates, times and locations). For questions regarding these courses, contact Steve Jackson at sbj1@cornell.edu.

All classes are held REMOTELY until further notice. Do not go to the DFA Training Room.

DFA Accounting Certification Program

Anyone in a service center role is required to complete the Accounting Certification Program within 18 months of employment and re-certify every 3 years.

The Accounting Certification Program (ACP) helps employees develop and enhance accounting skills and knowledge by providing an overview of the accounting function, as well as detailed training on the use of specific accounting tools and their associated policies and procedures. The ACP is constantly growing/changing. As core courses become available, you can take them individually and apply them to the certification.

To obtain credit for the course and eventual certification, staff members taking any ACP **core course** must pass an open-book exam for each class.

The following courses will be part of the redesigned program (you must take one elective). See the individual course pages for more information. Also see below for a description of these and other classes.

- Cornell Accounting 101

- FIN 101 Policy Considerations in Accounting
- FIN 104 Financial Stewardship and Ethical Conduct
- FIN 108 Unallowable Expenses
- FIN 111 Processing Capital Assets and Physical Inventory (elective)
- FIN 114 Financial Management of Sponsored Projects (Part 1 and Part 2)
- FIN 115 Financial Reporting Dashboard, Sponsored Financial Activity (elective)
- FIN 202 Reconciliation of Assets and Liabilities and Monitoring Operating Accounts
- FIN 203 Internal Controls at Cornell University
- KFSIDR 1040 The Wonderful World of WebFin II (elective)
- KFSIDR 1050 Using KFS Dashboards to Manage Accounts and Transactions
- RMI 100 Everything You Wanted to Know About Risk Management and Insurance

Register for the DFA Accounting Certification Program (all classes are listed in one place for ease of registration)

Cornell Accounting 101

This course is for staff members who work with accounting information or who are new to Cornell accounting methods. The three-session program uses a mixture of online and traditional classroom learning. There is an online, open-book exam after each session (a total of 3 exams) that must be completed along with all three sessions to receive credit. Exams **do not** need to be completed before attending the next session.

Session I: An online prerequisite for sessions II and III, this session provides an online introduction to accounting topics and policies such as the accounting equation; assets, liabilities, and fund balance accounting; debits and credits; ethics; compliance and methods, the Cornell accounting structure; and commonly used accounting terms. Approximate completion time is 20-30 minutes (not including the exam).

Session II: This classroom session will cover topics such as debits and credits; organizations (orgs) and the org structure; account types; the Cornell accounting string (account, sub-account, object codes, sub-object codes, project codes, org ref ID); restriction classifications (unrestricted, temporarily, permanently); account attributes (fund, sub-fund, sub-fund program); and higher education function codes.

Session III: This classroom session will tie together the topics covered in Session II by reviewing KFS, including creating/updating an account; creating a sub-account; creating a sub-object code; closing accounts; viewing account balances; understanding general ledger (GL) pending entries and self-balancing accounts; measuring accounting information; accounting fiscal periods; reporting accounting information (dashboards and Web Financials II).

Instructors

Accounting staff members and Steve Jackson, ODTM

Register for ACCT 101

FIN 101: Policy Considerations at Cornell

FIN 101: Policy Considerations at Cornell comes back to life from the pre-KFS days in this new, self-paced **online course** that covers several university policies, including 3.14, Business Expenses; 4.2, Transaction Authority and Payment Approval; and 4.6, Standards of Ethical Conduct; along with various citizenship and tax information.

Register for FIN 101

FIN 104: Financial Stewardship and Ethical Conduct

For all staff members who work with accounting information and who are new to Cornell accounting methods, this class will cover topics including responsibilities for stewardship and fiduciary responsibility at the university, types of accountability, policy resources, standards of ethical conduct, transaction authority reviews and payment approvals, conflicts, financial irregularities, internal controls, risk assessment and monitoring controls. We will also review several case studies based on the material presented.

Instructors

Cornell University Audit Office staff members

Register for FIN 104

FIN 108: Unallowable Expenses

Suggested Prerequisite: **Accounting 101** (see above) or a minimum of 3-6 months experience working with Cornell accounts.

This course defines allowable and unallowable costs from the vantage point of the university and the federal government. Excerpts from the new Uniform Guidance (2 CFR 200) will be discussed in detail. Other topics include how to code federal unallowable transactions, how federal unallowable costs affect the facilities and administrative rate calculation, and the review process for federal unallowable costs.

Instructors

DFA Cost and Capital Assets staff members and Steve Jackson, ODTM

Register for FIN 108

FIN 111Processing Capital Assets and Physical Inventory

This class will provide an overview of the capital assets policy and thresholds. Topics covered include Cornell's definition of a capital asset; the importance of keeping capital asset records current; handling sponsor-owned equipment; tagging assets; and working with the surplus and disposal processes. KFS topics include pre-asset tagging, editing assets, transferring assets, loaning or returning equipment, fabrication of assets, retiring assets, and conducting the barcode inventory process. (This course replaces KFSCAM-600.)

Instructors

Capital Assets staff members

Register for FIN 111

FIN 112Processing Capital Assets and Physical Inventory

This course/tutorial covers a variety of Cornell policies and procedures for managing and accounting for leases including the decision making needed to identify leases and non-leases.

Register for FIN 112

FIN 114: Financial Management of Sponsored Projects

NOTE: *Effective Fall 2020 this is a two-part program. Please make sure you pay attention to class dates and times because they will be on separate days.*

This **two-part course** will provide a foundation for managing sponsored projects.

Part 1: Sponsored Financial-Managing Sponsored Projects is an overview of sponsored projects, including the life cycle, research administration at Cornell, and general principles surrounding oversight of a project. 1.5 hours. **For those who have completed Research Administration Certification Program (RACP),** Part I is not required but you still need to register for the entire course, attend Part 2, and pass the exam.

Part 2: Sponsored Financial-Managing Sponsored Accounts is an overview of project accounts associated with a sponsored activity. Includes time for testing and reviewing accounts in the Kuali Financial System. 1.5 hours.

This course is the foundation for Financial Management of Sponsored Activity and**a prerequisite for these courses** in this suite:

- FIN 115 Sponsored Financial-Financial Reporting Dashboard (Sponsored Financial Activity)
- FIN 116 Sponsored Financial-Post Award Administration Requirements (Online Modules)

Instructors

Sponsored Financial Services staff members

Register for FIN 114

FIN 115: Financial Reporting Dashboard, Sponsored Financial Activity

We strongly encourage you to complete (or be currently taking) FIN 114 Financial Management of Sponsored Projects before taking this course.

This course is an overview of the Sponsored Financial Activity dashboard, which presents financial activity associated with sponsored projects. You will learn how to analyze your project by reviewing the current financial status and monitoring activity on a regular basis.

Attendees should have general dashboard knowledge (completed KFSIDR-1050) and an interest (current or future) in managing sponsored activity. Access to this dashboard follows the general accounting role and may be restricted by local college access.

Instructors

Sponsored Financial Services staff members

Register for FIN 115

FIN 116: Financial Reporting Dashboard, Sponsored Financial Activity

We strongly encourage you to complete (or be currently taking) FIN 114 Financial Management of Sponsored Projects before taking this course.

This course comprises **thirteen distinct online modules** and provides an overview of Uniform Guidance Post-Award Federal Requirements. You will learn how to manage and navigate post-award financial administration of a sponsored project.

Topics include administrative rules, budget analysis, cost principles, salary certification, participant costs, equipment, cost share, indirect costs, subawards, program income and financial monitoring.

Register for FIN 116

FIN 118: Determining the Facilities & Administrative (F&A) Cost Rate

This program provides greater understanding of the development of the Facilities and Administrative (F&A) cost rate and will be valuable for those working with sponsored grants and contracts or managing F&A recoveries at a college or university level. The session will provide an overview of the processes involved in developing the F&A cost rate, including the impact of coding of accounts, the treatment of unallowable expenses and activities, the impact of cost sharing, the importance of properly coding space usage, and a case study of how the numbers are all put together.

Register for FIN 118

FIN 201: Developing User Fees for Service Facilities and Recharge Operations

This workshop provides to recharge operation and service facility managers the background and knowledge necessary to develop accurate, equitable, and compliant user fees. Topics covered include key definitions, relevant regulations and policies, key requirements of University Policy 3.10, Recharge Entities, the difference between recharge operations and service facilities, which costs can and cannot be recovered through user fees, how to calculate user fees, how to handle subsidies (user fee and user subsidies), applicable accounting procedures, the review and approval process, and common problems/deficiencies.

Instructors

Nancy Abbott, Cost and Capital Assets

Register for FIN 201

FIN 202: Reconciliation of Assets and Liabilities and Monitoring Operating Accounts

Prerequisites: Accounting 101 and KFSIDR-1050

This class is for staff members responsible for monitoring revenue and expenses for Cornell, state, federal or contract and grants accounts, as well as performing account reconciliations.

This three-hour class provides guidelines for reconciling asset and liability object codes and monitoring revenue and expense activity. It will define the difference between a reconciliation and activity monitoring, as well as cover risk assessment, properly recording sales tax, correcting unknown variances, and writing off uncollectible receivables. During the class, we will be using the KFS Dashboards and hands-on exercises to reinforce reconciliation techniques and strategies.

Instructors

DFA Accounting staff members

Register for FIN 202

FIN 203: Internal Controls at Cornell University

All Cornell University employees have a role to play within the university's internal control framework. This introductory course explains internal controls in general along with the employee's responsibilities for internal controls within Cornell's framework.

Topics include the definition of internal controls and why are they important, an overview of Cornell's internal control framework, challenges that may exist and how to manage them, and key controls.

Instructors

DFA Accounting staff member

Register for FIN 203

KFSIDR 1040: The Wonderful World of WebFin2

Prerequisite: You must have KFS Accounting Dashboards access when registering for this class. If you do not, request access for the KFS Staff Accounting role in Cynergy from your business service center.

Learn how to use the full power of the WebFin2 dashboard to meet your reporting needs. This hands-on class is designed for staff members with accounting responsibilities who need to review and monitor transactionaland summary-level data at the individual account level. Topics discussed include viewing account balances, year-to-date and inception-to-date summary reports, reviewing transactions, drilling from summary reports to transaction details, understanding encumbrances, and using the WebFin2 Account Notes feature.

Users with KFS Labor access will learn how to interpret the summary/name detail views provided in many reports. Many custom navigation features of this dashboard will be explained.

Users will learn how to answer common questions such as:*Do I have enough money in my account to make this purchase? How can I find if any of my accounts are in overdraft status? Where can I find information on remaining PO and labor encumbrance balances? How does my account compare to budget? What salaries have been charged to my account? What was purchased at the campus store?* We will also cover the extensive OBIEE dashboard tools available, such as changing the sort order and column order in reports, moving report columns to create custom filters and report breaks, adding sub-totals to existing reports, hiding columns to redesign dashboard report format; and saving customized reports for future use.

Instructors

Tim Pollard (CIT) and DFA staff members

Register for KFSIDR 1040

KFSIDR-1050: Using KFS Dashboards to Manage Accounts and Transactions

Prerequisite: Using KFS Dashboards Overview Tutorial (KFSIDR-1000DASH-Tutorial)

This class combines the previous KFSIDR-1000 and KFSIDR-1100 classes. This hands-on class is designed for transaction specialists who need to review, monitor, and report on transactional activity in their accounts. Learn how to use the financials dashboards to find transactions posted to your accounts, including using page selectors to request data specific to your needs; changing column and sort order; sub-totaling; hiding columns to redesign dashboard report format; and saving customized reports for future use. It is also designed for account representatives and finance specialists who need to manage budget and financial activity in their accounts. Learn how to use the financials dashboards to find funds available, balances for accounts in your organization, and compare financial activity against budgeted allocations. Answer questions such as, *Do I have enough money in my account to make this purchase? How can I find if any of my accounts are in overdraft status? How can I monitor asset and liability balances? Where can I find information on remaining PO encumbrance balances?* We will also cover changing the sort order in reports, moving report columns to change the display, and adding subtotals to existing reports.

Instructors

Steve Jackson, ODTM and Financial Systems and Information Delivery (FSAID) staff

Register for KFSIDR 1050

RMI 100: Everything You Wanted to Know about Risk Management and Insurance

Risk Management is everyone's responsibility. In this class, you will learn how the risk management process can help you become a more effective steward and protect the human, physical, and financial assets of the university. You will gain an understanding of the university's insurance programs, the claim process, and the university policies that are impacted by risk management.

Other topics covered include risk identification, risk rates and exclusions, the cost of allocation, emergency planning and business continuity, insurance claims and incident reporting, deductibles, contractors (paying for services), architects and engineers, certificates of insurance and risk, foreign travel and travel risks, sexual harassment, rental cars, contract risks, use of university property, and use of alcohol.

Instructors

Risk Management and Insurance staff members

Register for RMI 100

PAY 1000: Payroll Certification Program (NEW PROGRAM)

PAY 1000 Payroll Certification This is a five course, six session program (PAY 101 is TWO sessions with a pre-session tutorial) that will help give you the skills you need to manage the administration of payroll and payroll functions effectively and efficiently.

Topics include:

- An overview of Cornell Payroll and the payroll function
- Time Tracking including time tracking essentials and time tracking reports
- Absences and Leaves, Non Exempt Time Off Types, Adjusting Time Off Balances and Paid Time Off
- Leaves and Workday Time Tracking, Exempt Time Off and Payroll
- Understanding the Vacation Reset Process
- Time Clocks

Working with Unions and Workday.

Please view the Session Details for each course to see the available class dates and times.

All classes will be virtual.

Instructors

Cornell University Payroll staff members

Register for PAY 1000

PAY 104: Treaty Benefits and Taxation for Foreign Nationals

This class is for staff members responsible for working with foreign nationals, dealing with visas, and making payments to foreign nationals.

This is a two-part workshop.

Part I is an online tutorial that covers common definitions, visa types, tax treaties and documentation pertaining to payment processing for foreign nationals.

Part II is an instructor-led class where we will cover examples and case studies on topics such as determining if an individual is a foreign national; payment types to foreign nationals (honoraria, fee for services, stipends, and wages); and the types of documentation needed to receive treaty benefits and potential exemption from taxes. Participants will also review the Foreign National Questionnaire form and other required documents and backup material.

Instructor

Lori Kanellis, Tax Office

Register for PAY 104

PUR 1000: Procurement Certification Program

PUR 1000 Procurement Certification covers various aspects of the procurement process at Cornell. Participants will be guided through the purchasing decision process including identifying the appropriate payment method, selecting a vendor, processing a purchase order, identifying independent contractors, paying for services, and more.

The program is a series of nine classes, five of which are required. There are four required classroom courses and one required tutorial and four electives. You must attend all required classes and complete all exams for certification.

The classes required for certification include Procurement Overview (tutorial), The Basics of Cornell Procurement, Identifying Independent Contractors and Paying for Services, Processing Purchase Orders, and Contracts and Negotiations. The optional classes include Bid Solicitations, PCard Use for BSCs, Spend Viz, and e-SHOP.

Instructors

Cornell University staff members

Register for PUR 1000

Travel 100 Creating Your Travel Profile in Concur

This course will walk you through setting-up your traveler profile in Concur as well as cover the use of the Concur Mobile Apps and some high level travel policy information that pertains to the subject area

Cornell University staff members

Register for Travel 100

Travel 101 Booking Travel Profile in Concur

This course will go over the booking travel process using Concur and will also cover using other ways to book travel and enter that information into the Concur travel system. Some high level travel policy information will also be presented.

It is strongly recommended that the traveler already complete the TRAVEL 100 course prior to coming to this class.

Cornell University staff members

Register for Travel 101

Travel 102 Creating an Expense Report in Concur

This course will go through the expense report from beginning to end for travelers needing to complete the travel reimbursement process using the Concur travel system.

It is strongly recommended that the traveler already complete the TRAVEL 100 course prior to coming to this class.

Cornell University staff members

Register for Travel 102

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