BEST Advantage System - BUD & FIN
Learning Guide

A Guide to Getting Started in the BEST Budget and Financial applications

E-Learning Courses | Instructor-Led Trainings | Webinars | Resources

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Business Enhancement System Transformation (BEST) Project
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Welcome to the BEST Advantage System!

The Business Enhancement System Transformation (BEST) Advantage System is a modern, integrated, and user-friendly Enterprise Resource Planning system offered by the Los Angeles County Office of Education (LACOE)! BEST combines Budgeting, Financials, Human Resources and Payroll functionality for seamless and more efficient control and reporting.

The training to make you better, tools to bring you comfort, and answers to make you confident

The BEST Project Team, with help from LACOE's School Financial Services, has developed over 250+ hours of custom training courses and materials to help you transition into the BEST Advantage System. This Learning Guide provides users with an explanation of all training opportunities and resources available for the Budget (BUD) and Financial (FIN) applications.

Visit and register for the BEST Project Customer Resource Center (CRC) to access all available resources!

Learning and support from experts along the way

Leveraging decades of experience in K-12 and Community College School Business and Organizational Change Management, the BEST Project Team provides strategic, innovative training solutions and best practices designed for individual and organizational success. LACOE's Subject Matter Experts provide not only the training, but state-of-the-art post-production support. Our primary focus is helping you, your staff, and your agency be **effective, efficient, and allow you to experience the MANY BENEFITS of BEST!**

Training at your fingertips when you want it

Now offering 24-7 on-demand E-Learning for select courses focusing on required training needed to get access to and start using BEST.

Go to the BEST Learning Management System to register for and/or take the training now.

To register for a training, look for this icon throughout this book.

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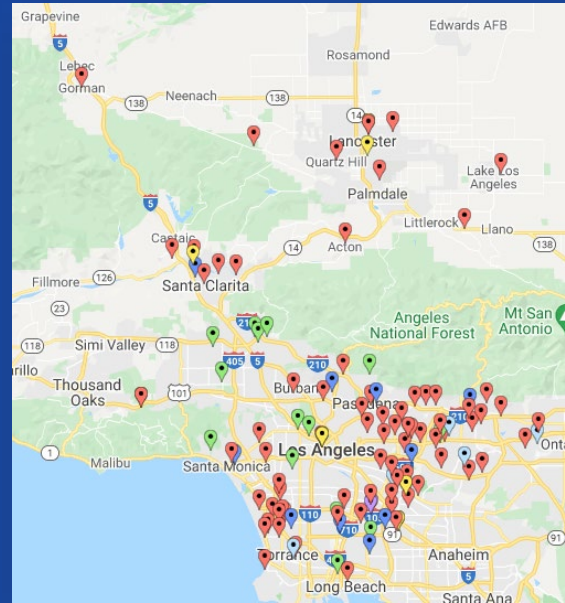Page 2
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BEST Training by the Numbers

600+ live webinars conducted each year.

6000+ users trained in the last 4 years

132 Agencies currently utilizing Budget and Financial functionality

Courses Offered

1 BUD

18 FIN

5 SUPP

Production Support Guarantee

Our team of Budget, Financial and Human Capital Management Subject Matter Experts are available 5 days a week via the BEST Project Help Desk to assist users in getting the job done, including: system access, addressing transaction error messages, BEST Practice recommendations, and more.

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BEST Training Overview

Welcome to BEST Training! Your journey starts here.

You have been identified by your District/Agency as a new or returning user of the BEST Advantage System – Budget and/or Financial application. The BEST Project Training Team has assigned various training courses particular to you and your role to help you get started in the system.

Your School Financial Services (SFS) team of Subject Matter Experts have also become certified in training on the BEST Advantage System. You can feel comfortable knowing that you will be trained by experts in the BEST Advantage System who are also experts in your day-to-day work processes.

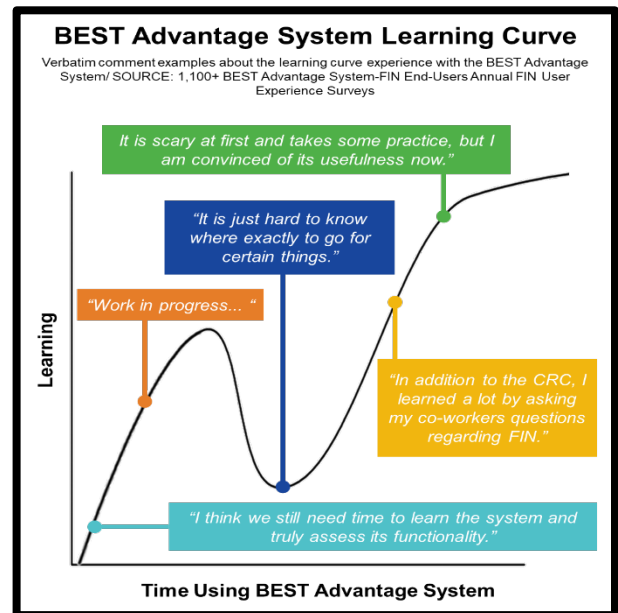### What can I expect on my Learning Journey?

Figure 1: BEST Advantage System learning Curve

Before you jump in and start registering for classes, let's explore what training options are available.

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BEST Training Approach: Learning Layers

We want you to feel comfortable and familiar with the new system before, during, and after Go-Live. Your BEST Training journey takes a layered approach by exposing you to various aspects of the system in phases to Get Ready, Get Set, and Go-Live!
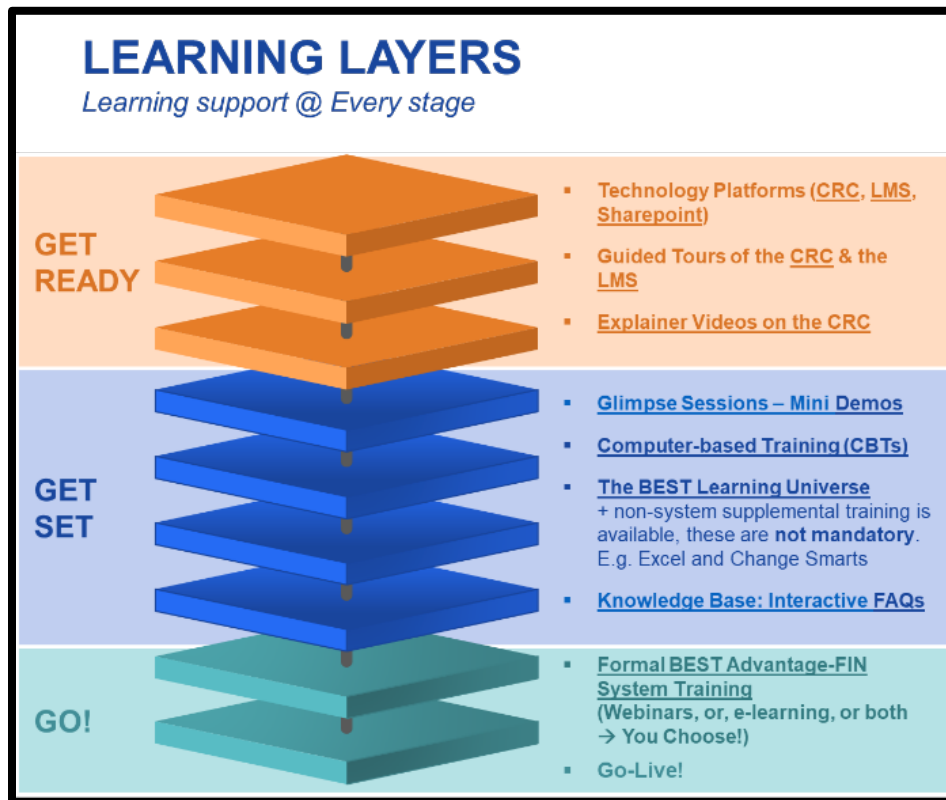

Figure 2: BEST Project - Learning Layers

5 Ways to Get Start Now!

Don't wait for your training class to start learning about BEST. Take a look at 5 ways you can get started immediately!

Sign up for the ***Customer Resource Center (CRC)*** and start exploring all the resources

Ask your ***BEST Liaison or BEST Ambassador*** about a Glimpse Session!

Sharpen your ***EXCEL skills*** to get ready for the new system!

Take a mini, interactive ***COMPUTER-BASED TRAINING (CBT)*** module!

Check out the ***Knowledgebase*** which is an interactive BEST FAQ page!

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Training Requirements and Recommendations

All new BEST Advantage System users are required to take introductory training for **each** application (Budget, Financials and/or Human Capital Management) prior to being granted access; these courses are identified as *"Access Granting"* courses. Although taking one Access Granting course will get you access to the specific application, it is highly recommended that you take ALL courses assigned. Let's take a look at the various training course types:

⚠ Access Granting Courses (Required)

To begin using the BEST Advantage System, you must complete at least **ONE** Access Granting course.

Examples Include: FIN-101w Getting Started in Financial

🚫 FIN-101w | Webinar - Getting Started in Financial   (Access Granting)

TIP: Look for the Access Granting in parenthesis next to course title. For a full list of Access Granting courses, see the next page.

👍 Recommended Courses

These are courses assigned to you based on your role. We have found that users that take all recommended courses have a better user experience and require less assistance.

Examples Include: FIN 501w – Inventory Warehouse Requestor; FIN 150w – InfoAdvantage Reports for FIN; **Supplemental**: Change Smarts Workshops; **Supplemental**: Excel 2016 – Intermediate

🚫 FIN-501w | Webinar - Warehouse Inventory Requestor   (Recommended)

🚫 FIN-EXCEL - Excel 2016 - Intermediate   (Supplemental)

TIP: These courses offer deeper learning about your specific role and the BEST Advantage – FIN system. Also, BEST offers "**Supplemental Courses**" that are recommended for professional development opportunities.

➕ Optional Courses

If you need more help or have questions about using the system, we have optional courses.

Examples Include: FIN Office Hours

🚫 FIN-OHw - FIN | Office Hours   (Optional)

TIP: You can add a course by navigating to the Course Catalog button in the navigation menu.

Figure 3 - BEST Project: Course Types Defined

Access Granting, Recommended, and Optional courses are identified in your Dashboard once you log in to the LMS! For more information on what to expect when logging into the LMS, check out the Guide to Getting Started in LMS, which will help you navigate the LMS, and provide guidance on which classes to sign up for.

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Training Course Formats: Instructor-led Trainings, Webinars, and E-Learning

BEST Project Training efforts were originally designed as in-person, Instructor-led Trainings at various training labs around LA County with instructor-led lessons and hands-on activities. Training Lab locations include:

LACOE – Ed Center
EC-202 LAB
9300 Imperial Highway
Downey, CA 90242

Castaic Middle School
Room L2 & L3
28900 Hillcrest Pkwy
Castaic, CA 91384

Park View Ed. Complex
Room 16 and 17
44327 Fig Avenue
Lancaster, CA 93534

Monroe Middle School
Room C103 & C104
10711 10th Ave
Inglewood, CA 90303

Blair Middle School
Room 1115 & 1116
1200 S Marengo Ave
Pasadena, CA 91106

Due to the COVID-19 pandemic, all BEST Training courses are now being offered virtually. We offer instructor-led trainings as live, interactive webinars (w) as well as self-guided E-Learning courses (e) you can take at your own pace. You are able to take both versions (webinar & E-Learning), but are only required to take one or the other.

Instructor-led Webinars (w)	E-Learning Courses (e)
Instructor-led webinars are conducted via a live Zoom meeting with interactive activities that will allow users to log into our training environment to complete practice transactions. Certified trainers, BEST Project staff, and LACOE School Financial Services (SFS) staff are available during each class to answer any questions.	Our E-Learning courses are offered as an on-demand self-guided training course where users can progress through structured content at their own pace and participate in simulated transactions directly in the Learning Management System. This can be a great option for users that are a little more tech-savvy and want to complete the lesson at their pace.
Instructor-led Classroom Trainings (C)	
Instructor-led, in-person classroom trainings are conducted at one of five BEST training labs, located strategically throughout LA County. These trainings consist of instruction and hands-on activities.	

Figure 4: BEST Project: Training Course Formats

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How to Get Access to the BEST Advantage System

1 District Security Administrator Submits UDOC or HRDOC

All new BEST Advantage System user account requests must be submitted to SFS Security by your approved District Security Administrator (DSA). Prior to Go-Live, this is accomplished by updating your User Security Workbooks or emailing SFS Security. Once your District/Agency is Live in the BEST Advantage Systems, these requests are handled within the system: User Maintenance (UDOC) document for Financial and HRDOC for Human Capital Management.

2 Receive BEST Advantage System - BUD, FIN, or HCM Username and Password

As an end-user, you will receive an email from LACOE School Financial Services (SFS) with your Username and Password for the BEST Advantage System - BUD, FIN, or HCM. These credentials are locked until you complete training for an access-granting course. Save this email.

3 Receive Training Email with Instructions for Registration

You will also receive an automated email from the BEST Training Team, through the email handle BESTInfo, with instructions on how to register for training. This email contains your username and password for the BEST Learning Management System (LMS). The LMS is where you will register for your web-based training, manage all your learning activities, and keep track of the course you have completed.

4 Register and Complete Webinar Trainings and/or *eLearning Courses

Log In to LMS and View Learning Activities Under "My Account" Page

Participate in Webinar → Certificate Issued

Register for a Webinar Session of an Access Granting Course

HCM-101
FIN-101
FIN-120
FIN-130
FIN-200
BUD-101

*Launch an Access Granting eLearning Course from LMS

Complete All Lessons Online → Certificate Issued

*Please note that eLearning is not available for all access-granting courses, nor is it assigned to all users.

5 BEST Advantage System - BUD, FIN, or HCM Credentials are Activated

SFS Automatically activates all end-users who have completed access-granting courses every Friday. You will receive an email confirmation.

6 Complete Remaining Learning Activities, Review Extended Learning Resources on CRC, and Register for User Groups
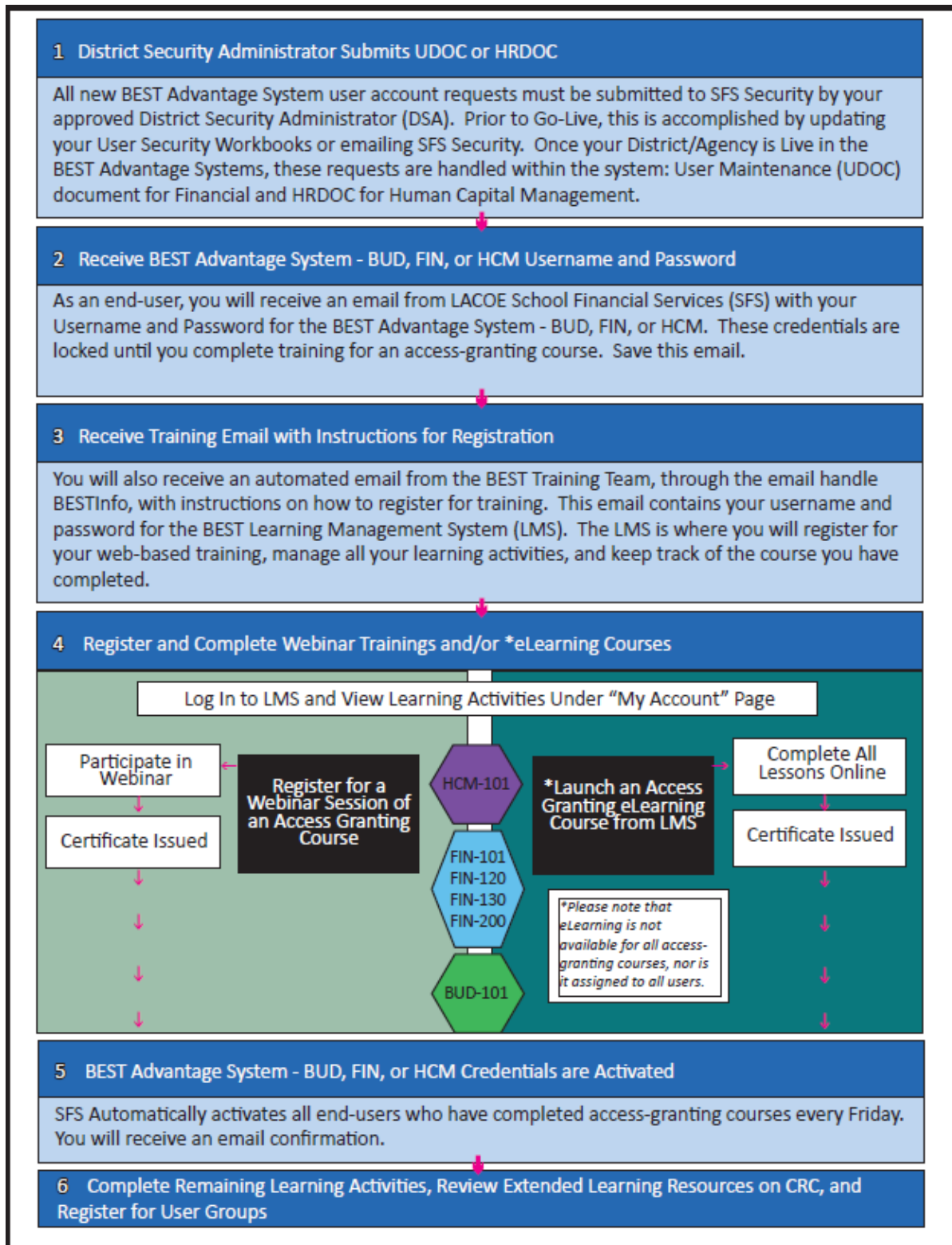
Figure 5: How to Get Access to BEST

Your Learning Path: How to Design Your Custom FIN Learning Plan

There is no one "right" way to get trained and ready for the new BEST Advantage System-Financial. We offer many options for you to construct a learning path that works best for you. At the end of the day, all users must take one (1) Access Granting Course in order to activate their BEST account. However, it is highly recommended that you take all recommended courses assigned in the LMS to ensure you are ready to get the job done!

The courses assigned to you are based on your role. Take recommended courses to gain more specific skills for your job. We have found that users that take all recommended courses have a better user experience and require less assistance.

SAMPLE: Here is one path a Financial User may take:
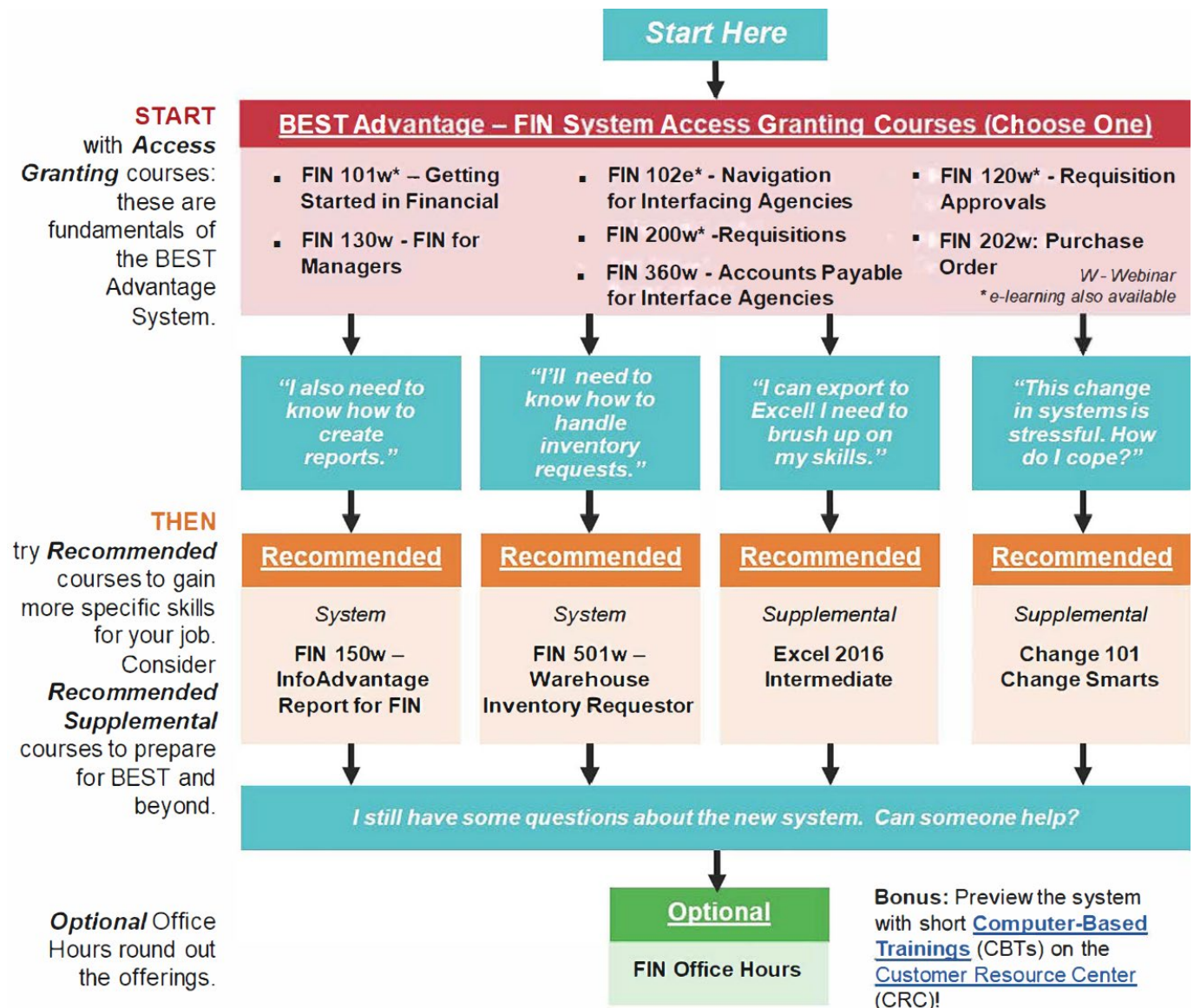
Figure 6: Sample Learning Plan (Financial)

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The BEST Training and Learning Universe of Resources

The additional materials are identified and links to these materials are provided in the guide. These materials can be found on the Customer Recourse Center, https://bestcrc.lacoe.edu/ .

BEST Training & Learning Universe
Resources available to support the BEST Advantage System implementation.

The following resources are available 24/7* to assist agencies going through change as they implement the BEST Advantage System. Click on each description to be directed to the resource or area on the BEST Project Customer Resource Center (CRC). If you have not yet registered for the CRC, please visit https://bestcrc.lacoe.edu/ for instructions.

Read & Explore
- Change Planner
- Recipe Cards

Attend & Practice
- E-Learning Courses
- Practice Sandbox
- Instructor-Led Trainings*
- Computer Based Trainings

Watch & Discover
- User Groups

Connect

- Explainer & Quick Tip Videos
- Knowledge Base
- Pre-Recorded Webinars
- Glimpse Sessions
- Fast Functions
- Learning Management System (LMS)
- Training Guides
- Quick Reference Guides
- BEST INSIDER
- Learning Roadmaps

? **Questions or Suggestions?**
Contact:
BESTInfo@lacoe.edu

✋ **Help?**
Contact:
HelpDesk@lacoe.edu
(562) 922-8888

Connect

User Groups **and Forums**: Online communities for users to share best practices, ideas and access resources.

Read & Explore	Attend & Practice	Watch & Discover
Change Planner Toolset to implement organizational change.	**E-Learning Courses** Web based learning, learners can take at their own pace and on their schedule.	**Explainer & Quick Tip Videos** Short lessons that detail how to complete specific activities in the BEST system.
Fast Functions Detailed, step-by-step process-oriented guides with screen shots for frequently used tasks.	**Instructor-led Trainings*** Live classes lead by an instructor either through virtual webinar or traditional classroom setting.	**Pre-recorded Webinars** Classes that have been delivered and made available to watch any time.
BEST INSIDER An e-newsletter with specific tips that end users have asked about.	**Learning Management System (LMS)** System where users can register for training and access webinars and eLearning courses.	**Glimpse Sessions: FIN Mini-Demos** A facilitated online demonstration of the actual FIN application where users can ask questions.
Learning Roadmaps High level overview of the sequence of learning activities for each of the BEST System applications (BUD, FIN, HCM).	**Training Guides** Materials presented during workshops, Super- and End-User Training. Available 24/7 for download.	**Knowledge Base** An interactive online FAQ where users can ask questions and find answers
Quick Reference Guides Detailed, step-by-step transaction-oriented guides with screen shots for frequently used tasks.	**Computer Based Training (CBT)** Online modules to get started within the applications through video demos and system simulations	
Recipe Cards Short reminders of how to execute a particular task.	**Practice Sandbox** A system where users can go to practice what they have learned in training classes.	

*Instructor-led trainings are live events that require registration through the LMS.   Last updated 9/21/21

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Figure 7: BEST Training and Learning Universe

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Post Go-Live Support: Call the Help Desk!

Leveraging decades of experience in K-12 and Community College School Business and Organizational Change Management, the BEST Project Team provides strategic, innovative training solutions and BEST Practices designed for individual and organizational success. LACOE's Subject Matter Experts provide not only the training, but state-of-the-art post-production support. Our primary focus is helping you, your staff, and your agency be effective, efficient, and allow you to experience the many benefits of BEST!

The Help Desk and BEST Post Go-Live Support Process – IT'S AS EASY AS 1, 2, 3

1 The Help Desk Analyst logs your issue into our tracking system, assigns it to an Area of Support, (e.g. General Ledger, Accounts Payable, Accounts Receivable, Procurement, etc.),

2 The Help Desk Analyst then alerts the appropriate Subject Matter Expert (SME)
- The SME will call you back (Goal: within 24 hours)
- In some cases, the call may be transferred via direct Hot Hand Off

3 The SME then reviews, discusses, and resolves your issue
- A secure remote support tool may be used to view your application desktop to assist with diagnosing issues, if needed.

Note: You should receive a Service Request (SR) Number via email when the issue is opened and closed.

Tips BEFORE you Call or Email the Help Desk

- Review Areas of Support and align your issue, (GL, Procurement, Accounts Payable, etc.)
- Prepare any background information needed (E.g. screenshots of an error encountered)
- If writing an email:
  - Avoid acronyms, spell out in full
  - Include BEST - FIN PROD in Subject Line
  - Include Area of Support (E.g. General Ledger, Accounts Payable, Accounts Receivable, etc.)

What to EXPECT when you Call or Email the Help Desk

- Calls and emails will be logged and the appropriate SME will call you back within 24 hours (goal)
- All Help Desk calls or emails require you to do the following:
  - State your name, agency, contact information (email) and phone number
  - State your issue resides in the BEST – FIN PROD environment
  - State your Area of Support if known

Figure 8: Post Go-Live Support Process

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Course Quick View

Click on course name to navigate to course description and schedule.
*Courses for leadership

BUD Access Granting Courses			
Course Name	Format	Duration	Prerequisite
BUD 101 Budget Development	Instructor-led	4 Hours	

FIN Access Granting Courses			
Course Name	Format	Duration	Prerequisite
FIN 101 Getting Started in Financial	Instructor-led	3 Hours	
	E-Learning	1 Hour	
FIN 102e Getting Started in Financial for Interface Agencies	E-Learning	1 Hour	
FIN 120 Requisition Approval	Instructor-led	1 Hour	
	E-Learning	1 Hour	
FIN 130 FIN for Managers*	Instructor-led	1.5 Hours	
FIN 200 Requisitions	Instructor-led	3.5 Hours	
	E-Learning	1 Hour	
FIN 360 Accounts Payable for Interface Agencies	Instructor-led	3.5 Hours	
FIN Additional Courses			
Course Name	Format	Duration	Prerequisite
FIN 110 Vendor Management	Instructor-led	2 Hours	FIN 101 or 200
FIN 150 infoAdvantage Reports for FIN*	Instructor-led	1 Hour	FIN 101 or 200
FIN 210 Receiving	Instructor-led	1.5 Hours	FIN 101 or 200
FIN 220 Purchasing	Instructor-led	4 Hours	FIN 101 or 200
FIN 301 Accounts Payable	Instructor-led	6 Hours	FIN 101 or 200
FIN 310 Payroll and Other Tax Payments	Instructor-led	2.5 Hours	FIN 101 or 200
Accounts Payable - Payment Hold Processing	Instructor-led	3 Hours	FIN 101 or 200
FIN 401 General Ledger	Instructor-led	4 Hours	FIN 101 or 200
FIN 501 Inventory Warehouse Requestor	Instructor-led	1.5 Hours	FIN 101 or 200
FIN 510 Inventory Management	Instructor-led	4 Hours	FIN 101 or 200
FIN 601 Budget Control	Instructor-led	2 Hours	FIN 101 or 200
FIN 701 Accounts Receivable	Instructor-led	3 Hours	FIN 101 or 200
FIN 801 Fixed Assets	Instructor-led	3 Hours	FIN 101 or 200

Supplemental Courses			
Course Name	Format	Duration	Prerequisite
Change Smarts 101: Individual Change and Emotional Intelligence	Instructor-led	1.5 Hours	
Change Smarts 201: Team Change and Social Intelligence	Instructor-led	1.5 Hours	
Change Smarts 301: Organizational Change and Systems Intelligence	Instructor-led	2 Hours	
Excel 2016 – Intermediate (Part 1)	Instructor-led	3 Hours	
Excel 2016 – Intermediate (Part 2)	Instructor-led	3 Hours	Part 1

Your guide to getting started with
BEST Advantage System – Budget

BUD

Access Granting Courses

- Budget Development

Additional Resources

Connect		
User Groups and Forums		
Read & Explore	Attend & Practice	Watch & Discover
Fast Functions	Training Guides	
Quick Reference Guides		

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BUD 101 Budget Development

The Budget Development course provides guidance on uploading budget data using the BEST Advantage System – Budget (BUD), verifying the data, and generating the .dat file using the infoAdvantage reports. The course begins with an overview of the Budget application components and features to provide you with an understanding of how to log in, navigate, and search in BUD. This course will review system budget development timeline and demonstrate budget upload, budget modifications, and advancing budget stage 10 to 99. In addition, you will learn how to run reports in infoAdvantage to verify budget data in BUD and FIN.

Objectives

- Overview of the BEST Advantage System
- Navigating in Budget
- Review Dimension and Chart of Accounts
- Create Budget Requests
- Process Budget Requests
- View Budget Data
- Access Reports

Resources

Training Guides

BUD 101: Budget Development Course Guide

Fast Functions

FF: Uploading your Budget in BUD

FF: Update/Modify your Initial Budget before Adoption

FF: Insert New Account String

FF: Update Single Account String

FF: Update Existing Account Strings in Mass

FF: Delete Budget Account String

FF: Generate SACS Extract (dat file) for Single Budget Adoption

FF: Advance Your Budget Request to Stage 99

Course Schedule

BUD-101w	02/08/23 02/15/23 02/16/23 02/22/23

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Your guide to getting started with
BEST Advantage System – Financials
FIN

⚠ Access Granting Courses

Completing **one** of the following courses will grant you access to the BEST-FIN system:

- FIN 101 Getting Started in FIN
- FIN 102e Getting Started in FIN for Interfacing Agencies
- FIN 120 Requisition Approval
- FIN 130 FIN for Managers

- FIN 200 Requisitions
- FIN 202 Purchase Orders
- FIN 360 Accounts Payable for Interfacing Agencies

👍 Recommended Courses

These are courses assigned to you based on your role and should be taken to gain more specific skills for your job.:

- FIN 110 Vendor Management
- FIN 150 infoAdvantage Reports for FIN
- FIN 210 Receiving
- FIN 220 Purchasing
- FIN 301 Accounts Payable
- FIN 310 Payroll and Other Tax Payments

- FIN 401 General Ledger
- FIN 501 Inventory Requestor
- FIN 510 Inventory Management
- FIN 601 Budget Control
- FIN 701 Accounts Receivable
- FIN 801 Fixed Assets

➕ Additional Resources

Connect		
User Groups and Forums		
Read & Explore	**Attend & Practice**	**Watch & Discover**
📑 **Fast Functions**	📋 **Training Guides**	🧠 **Knowledge Base**
📖 **Quick Reference Guides**		
📋 **Recipe Cards**		

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FIN 101 Getting Started in Financial

The Getting Started in Financial provides an overview of the basic BEST Advantage System – Financial (FIN) application and its features. Learning to navigate in the Financial application is essential to performing your tasks in the application. The Financial login, home page, general navigation, search and inquiry features, and document creation are covered in this training course. In addition, the course introduces the approval workflow and the reporting tool, infoAdvantage.

This course is intended for all new users of the BEST Advantage System – Financial application in order to learn how to navigate, search, and create documents. The course duration is 3 hours.

This course is a prerequisite for all other training courses. Completion of this course also fulfills the requirement to grant access to the BEST Advantage System – Financial (FIN).

This course is available as an E-Learning course that you can take on your own schedule and at your own pace. Completion of the E-Learning course will fulfill the requirement to grant access to the BEST Advantage System – Financial (FIN).

Resources

Training Guides

FIN-101: Getting Started Course Guide

Computer Based Trainings

Approvals & Workflow

Recipe Cards

Manage Favorites

Create a Document Template

Course Objectives

- Navigate the Financial home page.
- Search inquiry pages and references tables.
- Create, review, and submit documents.
- Search documents on the Document Catalog.
- Approve and reject documents.

Course Schedule

FIN-101w	09/06/22 11/08/22 01/03/23 03/07/23 05/02/23 06/06/23
FIN-101e	On-demand

FIN 102e Getting Started in Financial for Interface Agencies

The Getting Started in Financial for Interface is an E-Learning course that provides an overview of the BEST Advantage System – Financial (FIN) application and its features. Learning to navigate in the Financial application is essential to performing your tasks in the application. The Financial login, home page, general navigation, search and inquiry features, and document creation are covered in this training course. In addition, the course introduces the approval workflow and the reporting tool, infoAdvantage.

This E-Learning course is intended for all new users of the BEST Advantage System – Financial application from interface agencies in order to learn how to navigate, search, and create documents. The course duration is 1 hour.

This course is a prerequisite for all other training courses. Completion of this course also fulfills the requirement to grant access to the BEST Advantage System – Financial (FIN).

This course is an E-Learning course that you can take on your own schedule and at your own pace. Completion of the E-Learning course will fulfill the requirement to grant access to the BEST Advantage System – Financial (FIN).

Resources

 Training Guides

FIN-101: Getting Started Course Guide

 Computer Based Trainings

Approvals & Workflow

Course Objectives

- Navigate the Financial home page.
- Search inquiry pages and references tables.
- Create, review, and submit documents.
- Search documents on the Document Catalog.
- Approve and reject documents.

Course Schedule

FIN-102e	On-demand

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FIN 110 Vendor Management

This course examines how to create and maintain vendor records and use the various pages in BEST Advantage System - Financial to store these records. You will use documents to create and modify vendor records as well as review the pages that are updated by these documents. The primary page that stores vendor information is the Vendor/Customer (VCUST) page. This course focuses solely on vendors; customers are discussed in the FIN-701: Accounts Receivable course.

Course Objectives

- Search for vendors in the Vendor/Customer (VCUST) page.

- Create a vendor using a Vendor Customer Creation (VCC) document.

- Modify a vendor using a Vendor Customer Modification (VCM) document.

Resources

Training Guides

FIN-110: Vendor Management

Computer Based Trainings

Create a Vendor

Create a Customer

Quick Reference Guides

QRG: Create a Vendor

QRG: Create a Customer

Knowledge Base

Default Vendor Address

Course Schedule

FIN-110w	09/28/22 10/26/22 11/17/22 01/11/23 02/01/23 03/01/23 04/12/23 05/03/23

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FIN 120 Requisition Approval

The focus of this course is approving Requisition (XREQ) documents for goods and services in the BEST Advantage System – Financial (FIN). This course also includes a brief introduction to navigating in Financial, including a review of the Requisition (XREQ) document, searching for documents using the document catalog and budget inquiries.

This course is intended for users who approve requisitions on behalf of their district/agency. Course duration is 1 hour. Completion of this course fulfills the requirement to be granted access to the BEST Advantage System – Financial (FIN) to be able to approve requisitions.

This course is available as an E-Learning course that you can take on your own schedule and at your own pace. Completion of the E-Learning this course fulfills the requirement to be granted access to the BEST Advantage System – Financial (FIN) to be able to approve requisitions.

Course Objectives

- Search for documents in Financial.
- View budget inquiries.
- Review the Requisition (XREQ) document components.
- Open worklist to view documents requiring approval.
- Take documents from the worklist to take approval action.
- Approve a Requisition (XREQ) document.
- Reject a Requisition (XREQ) document.

Resources

Training Guides

FIN-120: Requisition Approval Course Guide

Computer Based Trainings

CBT: Approvals & Workflow

Quick Reference Guides

QRG: How to Approve a Document

Knowledge Base

Worklist Detail - Approving Documents Quickly

Customization: Worklist Details Enhancements

Recipe Cards

Document Approval

Course Schedule

FIN-120w	09/13/22	10/04/22	11/01/22	01/10/23	02/07/23
	03/14/23	04/11/23	05/09/23		
FIN-120e	On-demand				

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FIN 130 FIN for Managers

The Manager Training course provides an overview of the basic BEST Advantage System – Financial (FIN) application and its features for managers. Learning to navigate in the Financial application is helpful to perform your tasks in the application. Reviewing documents, business areas, and searches and inquiry features are covered in this training course. In addition, the course reviews workflow, including how to approve and reject documents, and how to run reports using the reporting tool, infoAdvantage.

The course gives a high-level overview of FIN, guiding managers through the basic navigation, the business areas of Financial and the related documents. The course duration is 90 minutes.

This course is a prerequisite for all other training courses. Completion of this course also fulfils the requirement to grant access to the BEST Advantage System – Financial (FIN).

Resources

Training Guides

FIN-130: FIN for Managers Course Guide

Computer Based Trainings

CBT: Approvals & Workflow

Quick Reference Guides

QRG: How to Approve a Document

Recipe Cards

Document Approval

Course Objectives

- Navigate in Financial.
- Understand the lifecycle of a document and its layout.
- Explain key features and uses of the Financial functionality for various business areas.
- Open worklist to view documents requiring approval.
- Take documents from the worklist to take approval action.
- Approve a document.
- Reject a document.
- Use inquiry pages to look up information about encumbrances, payment requests, disbursements, and vendors.
- Run and export reports in infoAdvantage.

Course Schedule

FIN-130w	09/16/22	10/10/22	11/03/22	01/12/23	02/09/23
	03/16/23	04/13/23	05/11/23		

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FIN 150 infoAdvantage Reports for FIN

This course is intended to provide an overview of the BEST Advantage System reporting tool, infoAdvantage, and its features. This course focuses on learning to navigate in infoAdvantage and running reports. While infoAdvantage reports are available for all of the BEST Advantage System applications, this course centers on reports for BEST Advantage System – Financial (FIN).

Resources

Training Guides

FIN-150: infoAdvantage Reports for FIN

Course Objectives

The following topics are covered in this course:

- **Overview of BEST Advantage System** – provides an overview of the BEST Advantage system highlighting the Business Intelligence reporting tool, infoAdvantage.
- **Accessing Reports** – details how to navigate in infoAdvantage, and describes how to run/execute a report.

Course Schedule

FIN-150w	09/27/22 10/25/22 11/29/22 01/31/23 02/28/23 03/28/23 04/25/23 05/30/23 06/27/23

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FIN 200 Requisitions

The focus of this course is creating requisitions for goods and services in the BEST Advantage System – Financial (FIN). This course includes a brief introduction to navigating in the BEST Advantage System – Financial.

This course is intended for all users of the BEST Advantage System – Financial who create requisitions on behalf of their district/agency. The course duration is 3.5 hours.

Completion of this course fulfills the requirement to grant access to the BEST Advantage System – Financial (FIN).

This course is available as an E-Learning course that you can take on your own schedule and at your own pace. Completion of the E-Learning course will fulfill the requirement to grant access to the BEST Advantage System – Financial (FIN).

Course Objectives

- Navigate and search in Financial.
- Verify budget availability.
- Create a Requisition (XREQ) document for goods and services using the following methods:
  - By direct entry through the Document Catalog
  - By copying an existing requisition
  - From a document template
- Create a Requisition (XREQ) document template.
- Modify a Requisition (XREQ) document.
- Search for Requisition (XREQ) document.

Resources

Training Guides

FIN-200: Requisition Course Guide

Computer Based Trainings

CBT: Create Requisition from Doc Catalog

CBT: Create Requisition from Doc Template

Quick Reference Guides

QRG: Create a Requisition

Recipe Cards

Review Available Budget

Create a Requisition Document Template

Commonly Used Commodity Codes

Course Schedule

FIN-200w	09/06/22 03/07/23	10/04/22 04/04/23	11/01/22 05/02/23	01/03/23	02/07/23
FIN-200e	On-demand				

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FIN 210 Receiving

The focus of this course is recording the receipt of goods in the BEST Advantage System – Financial. The course duration is 1.5 hours.

Course Objectives

- Search for a Receiver (RC) document.
- Create a Receiver document.
- Modify or cancel a Receiver.

Course Schedule

FIN-210w	09/13/22 03/14/23	10/11/22 04/11/23	11/08/22 05/09/23	01/10/23	02/14/23

Resources

Training Guides

FIN-210: Receiving Course Guide

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FIN 220 Purchasing

This course is designed for users who create purchase orders. The course reviews the requisition document and describes the types of purchase order documents used to award an agreement to a vendor. It also looks at the Procurement Folder, which is a virtual way to capture all documents and attachments related to a procurement, and reviews inquiries and reports used to search for procurement information.

This course is intended for buyers who perform sourcing for procurement of goods and services. The requestor initiates the request for goods and services. The buyer reviews the request, sources the commodities, and translates the request into the appropriate award document. This course duration is 4 hours.

Course Objectives

- View procurement folders using the Procurement Management page.
- Create an award document from the Document Catalog.
- Create a purchase order by copying forward from a Requisition.
- Create a purchase order for a blanket purchase.
- Create a purchase order using the Requisition Workbench.
- Modify an award document.
- Cancel an award document.

Course Schedule

FIN-220w	09/20/22 03/21/23	10/18/22 04/18/23	11/15/22 05/16/23	01/17/23	02/21/23

Resources

Training Guides

FIN-220: Purchasing Training Guide

Computer Based Trainings

CBT: Create a PO from the Document Catalog

CBT: Create a PO from the Requisition Workbench

Quick Reference Guides

QRG: Modify or Cancel a PO

QRG: Create a Vendor

Recipe Cards

Commonly Used Commodity Codes

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FIN 301 Accounts Payable

Accounts Payable is the business function through which districts/agencies obligations to pay vendors are recorded, and the actual disbursement of funds is established in an efficient and timely manner. The process involves proper referencing of significant contract terms, if applicable.

Accounts Payable is used to pay for goods and services, including: utilities, lease agreements, professional services, and inventory items. This course will teach you how to perform accounts payable business processes in the BEST Advantage System – Financial (FIN). The course duration is 6 hours.

Course Objectives

- Navigate and search in Financial.
- Review the accounts payable process.
- Create a General Accounting Expense (GAX) document.
- Enter a vendors' invoice using the Invoice (IN) document.
- Create a Payment Request – Commodity (PRC) based document.
- Accrue Use Tax using a Payment Request Commodity (PRC) document.
- Create a Credit Memo using a Payment Request Commodity (PRC) document.
- Create a Commodity Encumbrance Correction (CEC) document.
- Modify and Cancel Payment Requests.
- Review the Matching Process.
- Review Commercial Claims Process.
- Review the Disbursement Process.
- Review the Disbursement Cancellation Process.
- Record a Manual Disbursement Tax Payment (MDTX) document to pay use tax.
- Review the inquiry pages for accounts payable.
- Review how to run accounts payable reports.

Resources

Training Guides

FIN-301: Accounts Payable Training Guide

Computer Based Trainings

CBT: Create a Vendor Invoice (IN)

CBT: Create a Vendor

Quick Reference Guides

QRG: Create an Invoice

QRG: Create a Vendor

Knowledge Base

Has The Check Been Cashed? Use VTH!

Canceling A Check: Explaining the Reason Codes & What They Do

Vendor Invoice & IN Document: My Taxes Don't Match!

Recipe Cards

Find a Vendor Payment

Send a Page

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Course Schedule

FIN-301w	09/14/22 10/12/22 11/09/22 01/18/23 02/15/23 03/15/23 04/19/23 05/17/23

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FIN 310 Payroll and Other Tax Payments

This course includes an overview of the Payroll Tax Payment process in the BEST Advantage System - Financial to the State and Federal Governments. This course provides step-by-step instructions on how to process the Manual Disbursement Tax Payment (MDTX) documents that initiate payment through the Express Tax payment service.

This course is intended for users who process payroll & other tax payments. The course duration is 2.5 hours.

Resources

Training Guides

FIN-310: Payroll and Other Tax Payments Course Guide

Course Objectives

- Search for and update Manual Disbursement Tax Payment (MDTX) documents that have been generated from an interface.
- Create a Manual Disbursement Tax Payment (MDTX) document from the Document Catalog.

Course Schedule

FIN-310w	11/14/22 02/09/23 05/11/23

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FIN 360 Accounts Payable for Interface Agencies

Accounts Payable is the business function through which districts/agencies obligations to pay vendors are recorded, and the actual disbursement of funds is established in an efficient and timely manner.

Accounts Payable is used to pay for goods and services, including: utilities, lease agreements, professional services, and inventory items. This course will teach you how to perform accounts payable business processes relating to interface agencies in the BEST Advantage System – Financial (FIN).

This course is intended for interface agency users who will review, update, and approve payment transactions in FIN as well as those who will create new and possibly modify existing vendors in FIN. The course duration is 3 hours.

Resources

Training Guides

FIN-360: Accounts Payable for Interface Districts

Quick Reference Guides

QRG: Commonly Used Documents and Reports for Interface Agencies

Course Objectives

- Navigate and search in Financial.
- Review BEST Advantage Financial Accounts Payable Interfaces.
- Review the Accounts Payable process for interface agencies.
- Review the General Accounting Expenditure Interface (GAXI) process and document.
- Review the General Accounting Expenditure Student Payments (GAXS) process and document.
- Review Workflow and Approval Process.
- Modify and Cancel GAXI.
- Review the Commercial Claims Process.
- Review the Disbursement Process.
- Review the Disbursement Cancellation Process.
- Record a Manual Disbursement Tax Payment (MDTX) document.
- Search, create, and modify a vendor record.
- Review the available inquiry pages for Accounts Payable interface agencies.
- Review how to run Accounts Payable reports.

Course Schedule

FIN-360w	09/21/22 10/19/22 11/16/22 01/25/23 02/22/23 03/22/23 04/26/23 05/24/23

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Accounts Payable – Payment Hold Processing

This class discusses the roles and responsibilities of Commercial Claims in the payment approval process as well as the responsibilities of users involved in accounts payable and purchasing at the district level; critical Accounts Payable processes, systems, and procedures; information for efficient and timely payment approval such as: the Commercial Claims Document Checklist, common legal codes related to purchasing, LACOE bulletins related to purchasing and accounts payable, documents, forms, and district contacts. This class should be attended by local educational agency management and staff with accounts payable and purchasing responsibilities or anyone who submits voucher requests.

Course Objectives

- Review the Commercial Claims Process.
- Review the Commercial Claims Document Checklist
- Review the common legal codes related to purchasing.

Course Schedule

Webinar	11/07/22 02/06/23

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FIN 401 General Ledger

The General Ledger area in the BEST Advantage System-Financial (FIN) allows for processing transactions not covered by specific functional areas in the system. General Ledger journal entries may be used to:

- Transfer, reimburse, adjust, or correct balances by moving expense, revenue, or balance sheet balances between accounts.
- Create recurring transactions.
- Create year-end adjustments or accruals.
- Post expense or revenue transactions between departments that perform services for one another.

This course is intended for users who create, maintain, and approve journal vouchers in Financial. The course duration is 4 hours.

Course Objectives

- Create a JVER/JVRR document to reclassify expenditures and revenues.
- Create a JEFB/JEFT document to borrow or transfer funds.
- Create a JVDEP document to record school deposits.
- Create a JVDT document to reclassify deposits.
- Create a CR document to record a deposit.

Course Schedule

FIN-401w	10/13/22	01/10/23	04/13/23	

Resources

Training Guides

FIN-401: General Ledger Course Guide

Computer Based Trainings

CBT: Create a School Deposit (JVDEP)

CBT: Create an Expenditure Reclassification (JVER)

Fast Functions

FF: Which JV Document to Use

FF: View and Print Journal Vouchers

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FIN 501 Inventory Warehouse Requestor

The Warehouse Inventory Requestors course is intended to provide guidance on ordering stock items from the warehouse using the BEST Advantage System – Financial (FIN). During this webinar, students will learn how to process inventory requests using the Stock Requisition and return unwanted items to inventory using the Stock Return.

This course is intended for users who order stock items from inventory in the BEST Advantage System - Financial. The course duration is 1.5 hours.

Resources

📋 **Training Guides**

FIN-501: Inventory Warehouse Requestor Course Guide

💻 **Computer Based Trainings**

CBT: Create a Stock Request (XSRQ)

Course Objectives:

- Navigate and search in Financial.
- Create a Stock Request (XSRQ) document to request stock items from inventory.
- Create a Stock Return (SN) document to return stock items to inventory.

Course Schedule

FIN-501w	09/07/22	10/05/22	11/02/22	01/04/23	02/08/23
	03/08/23	04/05/23	05/03/23		

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FIN 510 Inventory Management

The Inventory (Warehouse) Management webinar is intended to provide guidance on inventory warehouse management using the BEST Advantage System – Financial (FIN). During this webinar, students learn how set up tables to support inventory transactions, how to process inventory transactions and how item quantities are updated.

This course is intended for users who manage warehouses and inventory in the BEST Advantage System - Financial. The course duration is 3 hours.

Resources

📋 **Training Guides**

FIN-510: Inventory Management Course Guide

💻 **Computer Based Trainings**

CBT: Create a Stock Request (XSRQ)

Course Objectives

- Navigate and search in Financial.
- Create a Stock Request (XSRQ) document to request stock items from inventory.
- Create a Stock Return (SN) document to return stock items to inventory.

Course Schedule

FIN-510w	09/15/22 03/16/23	10/13/22 04/13/23	11/17/22 05/11/23	01/12/23	02/16/23

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FIN 601 Budget Control

The Budget Control course is intended to provide guidance on maintaining budgets using the BEST Advantage System – Financial (FIN). In this course, you will learn how budget types, Chart of Account (COA) elements, and budget components work together to create and manage budgets.

This course is intended for users who create, maintain, and approve budgets in the BEST Advantage System - Financial. The duration of the course is 2 hours.

Course Objectives

- Understand spending and revenue budget structures.
- Identify budget documents and understand their purpose.
- Search budget inquiry pages for a real time status on budgets.
- Create and submit budgetary control documents to:
    - Amend an existing budget
    - Transfer between budgets
    - Establish new budgets
    - Deactivate and Reactivate budgets

Resources

Training Guides

FIN-601: Budget Control Course Guide

Computer Based Trainings

CBT: Budget Adjustments

Quick Reference Guides

Review Available Budget in FIN

Knowledge Base

Budgetary Control in FIN vs PeopleSoft

Budget Inquiry Export

How Do I Check My Budget?

Course Schedule

FIN-601w	11/15/22	02/14/23	05/09/23

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FIN 701 Accounts Receivable

The Accounts Receivable course is intended to provide guidance on receiving payments from district/agency customers using the BEST Advantage System – Financial (FIN). In this course, users learn how set up customers and tables to support Accounts Receivable transactions and how to process receivable and cash receipt transactions.

This course is intended for users who track the receipt of cash in the BEST Advantage System - Financial. The duration if the course is 3 hours.

Course Objectives

- Review how to create a customer using a Vendor Customer Creation (VCC) document.
- Review how to modify a Customer using a Vendor Customer Modification (VCM) document.
- Create a Receivable (RE) document.
- Modify a Receivable (RE) document
- Create a Cash Receipt (CR) document.
- Modify a Cash Receipt (CR) document
- infoAdvantage Reports for Accounts Receivable

Resources

Training Guides

FIN-701: Accounts Receivable Course Guide

Computer Based Trainings

CBT: Create a Customer (VCC)

Quick Reference Guides

QRG: How to Create a Customer

Knowledge Base

PRO TIP: Vendor Address Default (VCC/VCM)

Steps To Modify/Add Customer Address

Recipe Cards

Processing a Cash Receipt with a Receivable Reference

Processing a Cash Receipt without a Receivable Reference

Course Schedule

FIN-701w	09/22/22 10/20/22 11/02/22 01/19/23 02/23/23 03/09/23 04/20/23 05/04/23

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FIN 801 Fixed Assets

The Fixed Assets course is intended to provide guidance on the control and management of Fixed Assets using the BEST Advantage System – Financial (FIN). In this webinar, students learn how set up tables to support Fixed Asset tracking and maintenance. The BEST Advantage System – Financial also provides for the management and control of both Capital fixed asset and Non-capital (Memo) fixed asset records.

Resources

📋 **Training Guides**

FIN-801: Fixed Assets Course Guide

This course is intended for users who manage and track fixed assets in the BEST Advantage System - Financial. The duration of the course is 3 hours.

Course Objectives

- Navigate and search in Financial.
- Review the lifecycle of a Fixed Asset.
- Review Fixed Asset tables in inquiry pages.
- Review the Fixed Asset set up tables.
- Acquire a Fixed Asset through the creation of a Fixed Asset (FA) document.
- Maintain a Fixed Asset by:
  - Adjusting an Assets Value through the Fixed Asset Increase (FI) document.
  - Maintain the details of an Asset by using the Fixed Asset Modification (FM) document.
  - Track Warranty, Labor and Material Costs though a Fixed Asset Repair and Warranty (FRM) document.
  - Dispose of an Asset through a Fixed Asset Disposition (FD) document.
  - Accessing InfoAdvantage Reports for Fixed Assets.

Course Schedule

FIN-801w	10/06/22 03/23/23

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Supplemental Course Offerings

Are you looking for a **smart** way to handle change?

Why Supplemental Courses?

To Help You Master the Top Two Power Skills of 2021 at BEST & Beyond!

Resilience CHANGE 101: Change Smarts

Change Smarts are highly interactive workshops that introduce the types of different "change smarts" needed to help people move through individual and team change. CHANGE 101 introduces Emotional Intelligence and Mindfulness

"If someone is able to stay calm, learn quickly and adapt to fast change, they can contribute to the organization's agility rather than hindering it."
- **WENDY QUAN, Founder** - *The Calm Monkey, Workplace Mindfulness Facilitator*

"I don't think there's any skill more critical for success than resilience – the speed and strength of your response to adversity."
- ADAM GRANT, Professor Organizational Psychology Wharton School of Business, Bestselling Author

Digital Fluency Intermediate Excel ("Excel for BEST")

This two-part Excel Intermediate course is offered **at NO CHARGE to all BEST Advantage System - Financial (FIN) users.** Learn skills such as formulas across sheets, navigating around sheets, conditional formatting, pivot tables, and more!

"There are so many aspects of Excel that you would want to learn to use a new system. Also Excel can help you prepare to become a data scientist… Many organizations, including ours, use Excel to think about and test models!"
 - MARIE SMITH, CIO, DATA 360

Increased data literacy means more use of EXCEL, not less."
- ERIC WEBER, Head of Experimentation & Metrics Research, YELP

* Source: *LinkedIn 2021 Workplace Learning Report*

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Change Smarts Workshop Series

Change Wisdom Starts with Change Smarts

This three-part workshop series introduces the three different types of "change smarts" to help people move through change at the individual, team, and organizational level. These three types of "change smarts" work together to help people develop the change wisdom needed to positively impact the outcomes of change – for themselves, their teams, and their organizations.

Change 101 **Individual Change**	Change 201 **Teams & Change**	Change 301 **Organizations & Change**
The 1st Change Smarts: **Emotional Intelligence**	The 2nd Change Smarts: **Social Intelligence**	The 3rd Change Smarts: **Systems Intelligence**
Time: 90 minutes	**Time:** 90 minutes	**Time:** 120 minutes
Tool: Mindfulness	**Tool:** Appreciative Inquiry	**Tool:** Design Thinking
When we are faced with change, how does the brain react? What sort of reactions can we expect? This first change workshop focuses on how each of us can bring our best self to any change and help us learn to have a healthy response to change by building our emotional intelligence and adopting tools of "Mindfulness."	How can your team make real progress during a change? Should you take a problem-solving approach, or an opportunities approach? This second change workshop focuses on building social intelligence and helping teams make real progress during times of change through the practice of "Appreciative Inquiry."	How can teams contribute to their organization's success during change? This final workshop delves into building your human systems intelligence as the last step in the change journey. We introduce "Design Thinking" as a tool that can help people discover the creative ideas in their own work and learn the "Aha!" of a process centered on empathy.

More about the Change Smarts Workshop Series

The Change Smarts workshop series was developed at the Los Angeles County Office of Education (LACOE) by a diverse group of professionals from different areas across the LACOE organization, external experts and the Business Enhancement System Transformation (BEST) Project's Organizational Change Management Team. For more information about the BEST Project, visit us on the web at: ***http://www.lacoe.edu/BEST***

For more information, or to schedule a workshop, please contact the BEST Organizational Change Management Team at BESTInfo@lacoe.edu or BEST_OCM@lacoe.edu

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Intermediate Excel – Part 1

If you took Getting Started with Excel, and/or are getting ready to implement the new BEST Advantage System – Financial (FIN), then you're ready to take your Excel skills to the next level.

Course Objectives

Build skills such as formulas across sheets, navigating around sheets, multiple workbook, sheet protecting, and features like flash fill, concatenate and vlookup.

Course Schedule

BEST: Excel for Finance Professionals Part 1	9/2/22 10/7/22 11/7/22 12/2/22 1/13/23 2/3/23 3/3/23 4/3/23 5/12/23 6/9/23

Intermediate Excel – Part 2

If you took Getting Started with Excel, and/or are getting ready to implement the new BEST Advantage System – Financial (FIN), then you're ready to take your Excel skills to the next level.

Course Objectives

Build skills such as convert data to table, modifying the table, conditional formatting and pivot table.

Course Schedule

BEST: Excel for Finance Professionals Part 2	9/16/22 10/21/22 11/18/22 12/16/22 1/27/23 2/13/23 3/17/23 4/17/23 5/26/23 6/23/23

The Excel courses are managed by our Instructional Technology Outreach (ITO) department.

You can register for Excel trainings at
https://ito.lacoe.edu/workshops/registration.pl?run_mode=create&workshop=518i.

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Your Guide to Getting Started in the Learning Management System (LMS)

BEST Training - Learning Management System

The BEST Project utilizes the Learning Management System (LMS) to assign, track, and conduct training. Upon being identified as a BEST user, the BEST Training Team will create a user's Learning Management System account and assign a user applicable training courses. Users must complete an access granting course in order to have their BEST account activated. BEST accounts are activated on Friday for users that complete an access granting course that week.

The BEST Training – Learning Management System (LMS) can be found at https://best-lms.lacoe.edu/

LMS: Registering for Courses in the Learning Management System

Step 1	• Go to the Best Training - Learning Management System (LMS) website at **https://best-lms.lacoe.edu/**
Step 2	• Click the **Sign In** button at the top right corner of the page. Log in using the LMS credentials found in the Invitation to Register email sent by BEST Training.
Step 3	• The courses assigned to you are listed in the My Dashboard tab under **Enrollments**. Click on the blue info button to read about each course.
Step 4	• Click on the green play button to register for a webinar session or begin an E-Learning course.

Figure 9: How to Register for Training

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LMS: Understanding My Dashboard
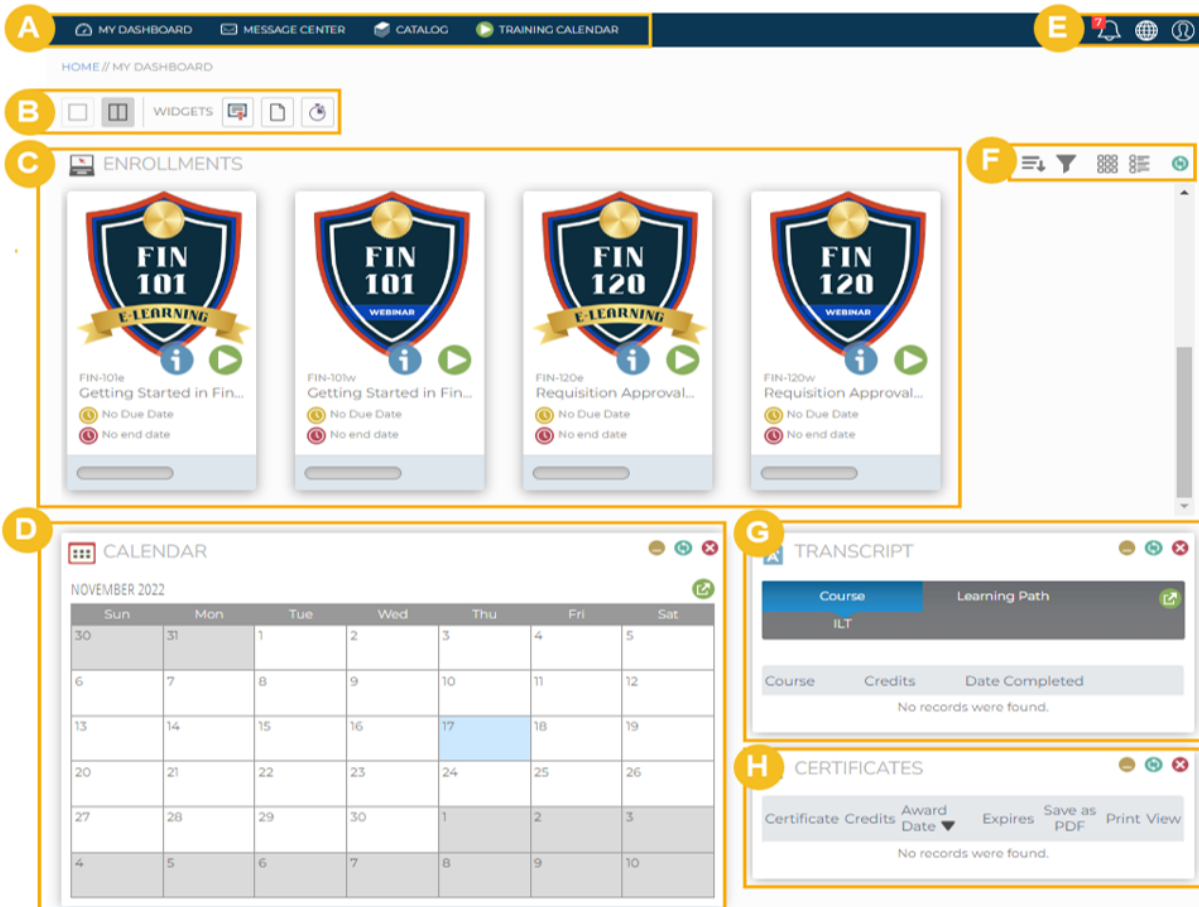
A	**Main Menu:** Allows you to navigate between your Dashboard, Message Center, Course Catalog, and Training Calendar.
B	**Dashboard Menu:** Allows you to select a viewing preference and enable additional widgets (My Certifications, Documents, Instructor Led Training Sessions).
C	**Enrollments:** Lists the courses assigned to you based on your security roles. These activities may include on-demand E-Learning modules and/or instructor-led webinars.
D	**Calendar:** Displays the webinar courses you have registered for. Click on the timer icon for session details, including the session date/time, instructor, and zoom link.
E	**Profile Menu:** Displays alerts and languages. Click on the person icon to make changes to your profile or sign out.
F	**Enrollments Menu:** Allows you to sort and filter the enrollments displayed and select a viewing preference (list view or tile view).
G	**Transcript:** Lists the courses you've completed.
H	**Certificates:** Lists the certificates you've earned. Click on the a icons to view, print, or save as PDF.

Figure 10: Learning Management System - Dashboard Overview

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How to Log in

Step 1

Open your web browser and navigate to the BEST Training - LMS website (http://best-lms.lacoe.edu).
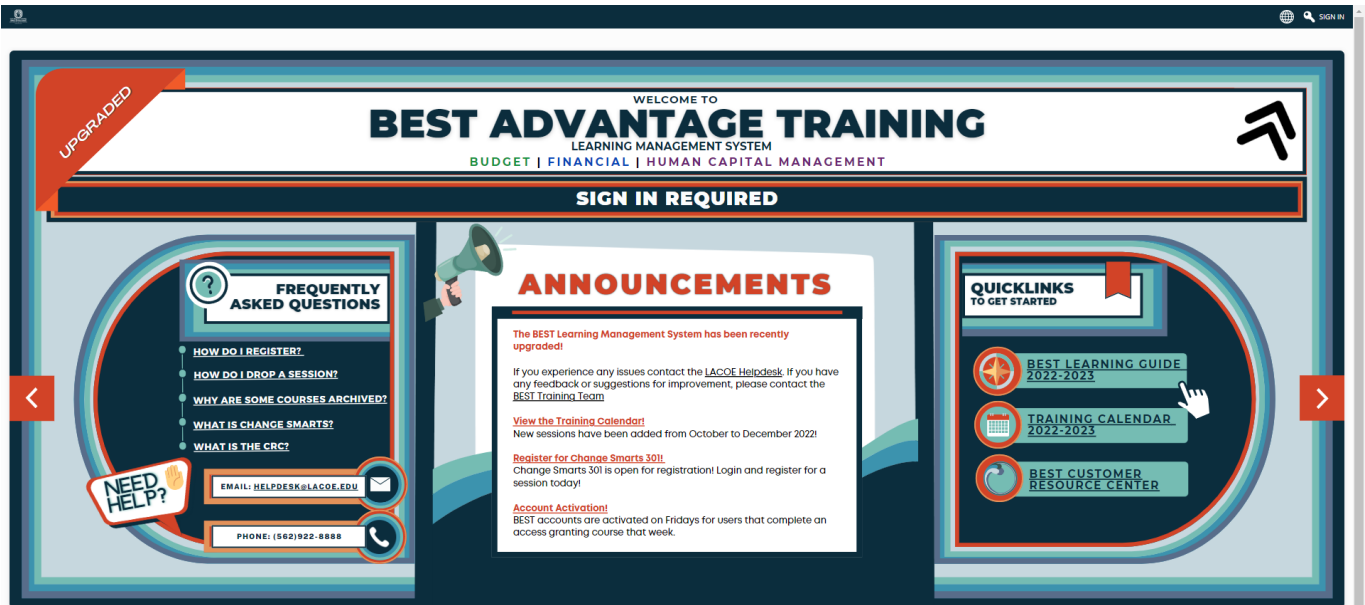
Step 2

Click SIGN IN at the top right corner of the screen.

Step 3

Use the login credentials sent to you from BEST Training (best_training@lacoe.edu) via email.
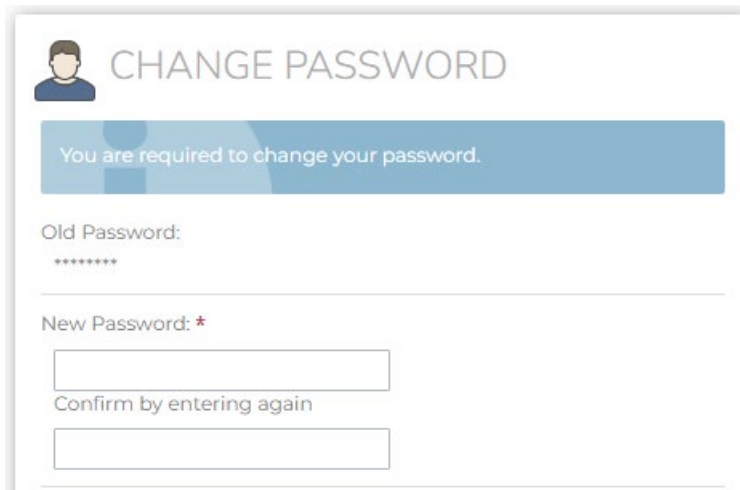
Username: [Check your email from BEST Training]

Default Password: BEST2022

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Step 4

You will be prompted to create a new password. The password should be easy to remember and it should include letters and numbers. Special characters may also be used in the password field. You cannot use your username in the new password or numbers in sequential order like 12345 or 54321. Keep in mind that your password is case-sensitive.

Forgot Your Password?

Click the "I forgot my password" link that appears under the SIGN IN window:

Next, type in your username and click submit.
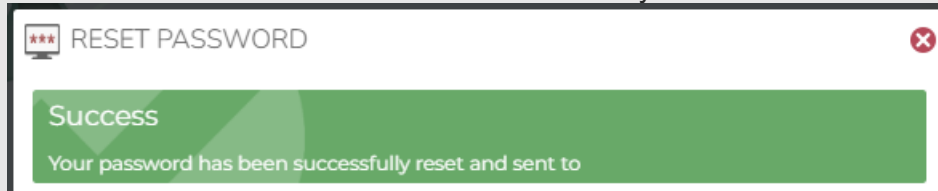
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Lastly, you will see a notification that an email has been sent to you.

Check your email (inbox and spam) and follow the instructions.

If you're having trouble accessing your LMS username and/or password, please contact the Helpdesk at (562) 922-8888 or helpdesk@lacoe.edu.

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Enrollments

You have been assigned training courses that directly relate to your role in the BEST Advantage System. You can find these courses in the My Dashboard tab under Enrollments.
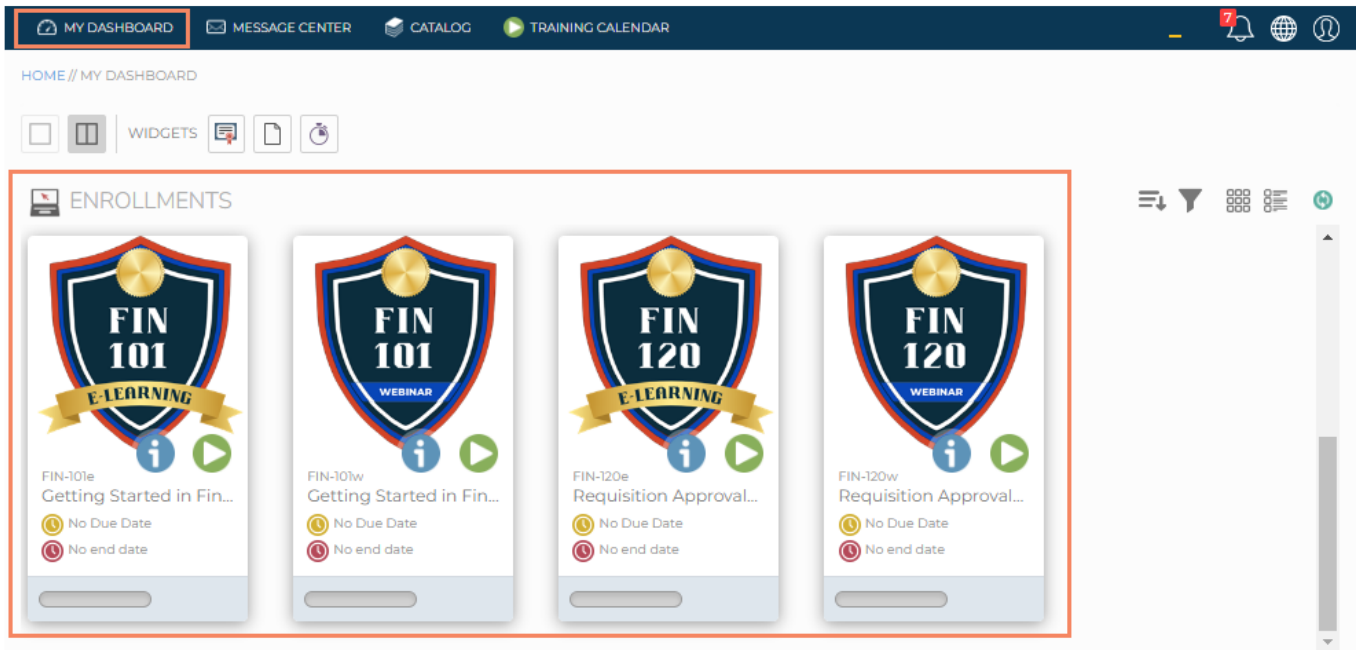
All users must take ONE access granting course in order to activate their BEST account. For the Budget (BUD) application, the access granting course is BUD-101. For the Financial (FIN) application, the access granting courses are FIN-101, FIN-120, FIN-130, FIN-200, FIN-202, and FIN-360. BEST accounts are activated on Friday for users that complete an access granting course that week.

All courses are available as instructor-led webinar sessions via zoom. These course codes are designated with a "w" (ex: FIN-101w). Some courses are also available as on-demand, E-Learning modules. These course codes are designated with a "e" (ex: FIN-101e). You only need to complete one version of a course (webinar or E-Learning), but are welcomed to take both (if available).

Although you are only required to take one access granting course for account activation, it is highly recommended that you take all courses assigned. We have found that users that take all recommended courses have a better user experience and require less assistance.

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Register for a Webinar

The following steps and screenshots walk you through the registration process for selecting dates and times to complete a webinar training.

Step 1

In the My Dashboard tab, under Enrollments, find a **webinar** training you are interested in attending.

Click on the blue "info" [] icon above the course title to read about this course and review the learning objectives.
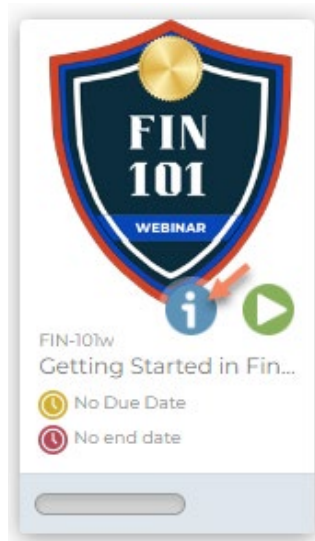
Step 2

To register for a webinar session, click on the green "play" [] icon above (or below) the course description.

Note: As you scroll down, you will also find the extended learning links which, when clicked, will direct you to the BEST Customer Resource Center (CRC) to find additional help and support. You must register for a CRC account to access these resources.

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Step 3

A Pop-Up window will open where you can select the date/time of the training session you would like to attend. Click on the radio button and then select OK.
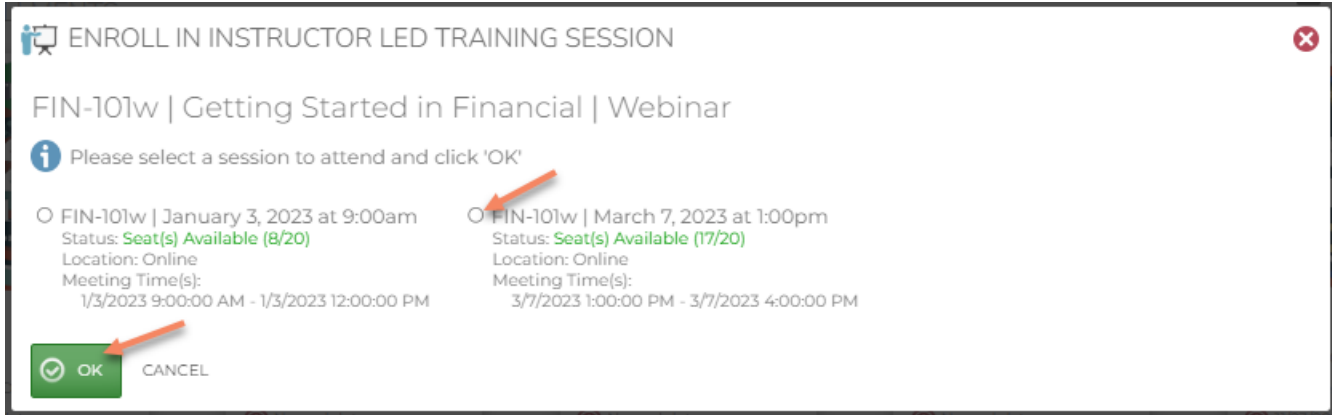
Step 4

You are now registered for a webinar! An email confirmation from best_training@lacoe.edu will be sent to the email address associated with your profile.

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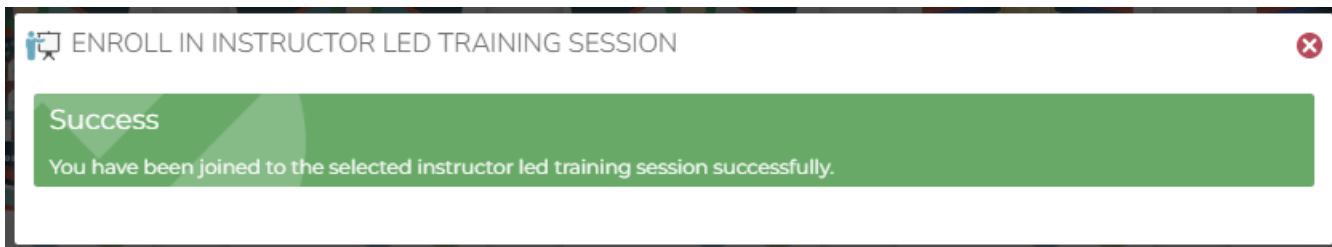
Adding a Session to your Digital Calendar

To add the event to your personal, digital calendar (i.e., iCalendar, Microsoft Outlook, or Gmail), navigate back to the My Dashboard tab.
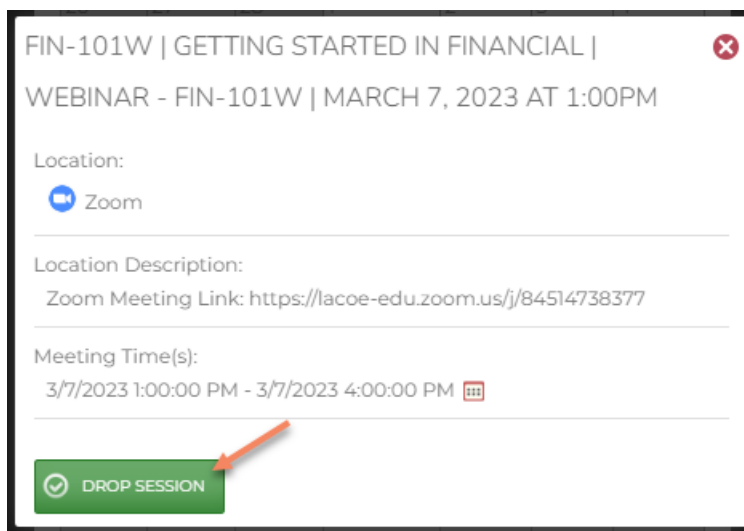
Step 1

On the Calendar widget, you'll see a purple timer icon [⏱] on the date of a scheduled webinar. Click on the timer to open up a pop-up page with the session details, including the meeting time and zoom link.
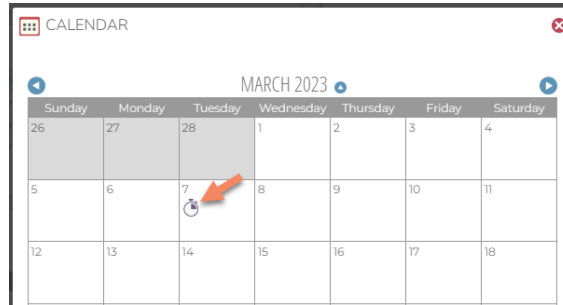
Step 2

On the pop-up page, click on the mini calendar icon [📅] to download the .ics calendar file.
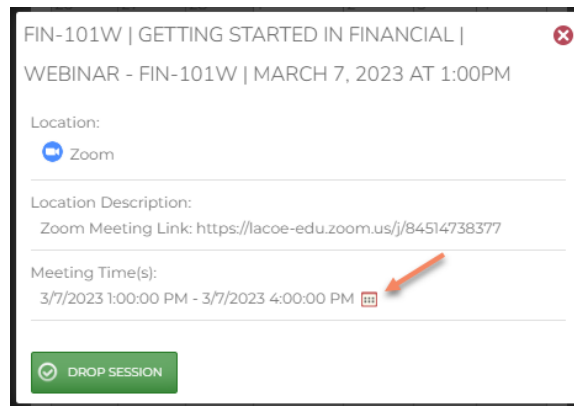
Step 3

Save the calendar file to your iCalendar, Microsoft Outlook, or Gmail.

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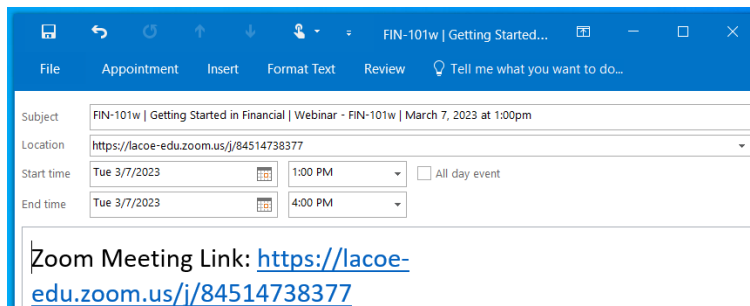
Dropping the Session

If, for any reason, you cannot attend a training, the following steps guide you through the process of dropping it from your schedule. Navigate back to the My Dashboard tab.

Step 1

On the Calendar widget, you'll see a purple timer icon [🕑] on the date of a scheduled webinar. Click on the timer to open up a pop-up page with the session details.
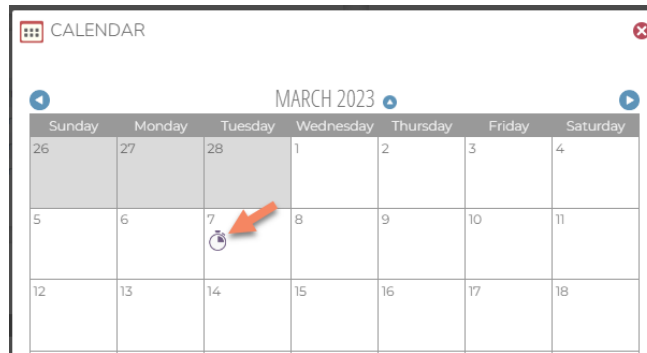
Step 2

On the pop-up page, click on Drop Session to cancel your registration.

Complete an E-Learning Course

The following steps and screenshots walk you through the process for completing E-Learning courses.

Step 1

In the My Dashboard tab, under Enrollments, find an **E-Learning** course you are interested in completing. Click on the blue "info" [] icon above the course title to read about this course and review the learning objectives.
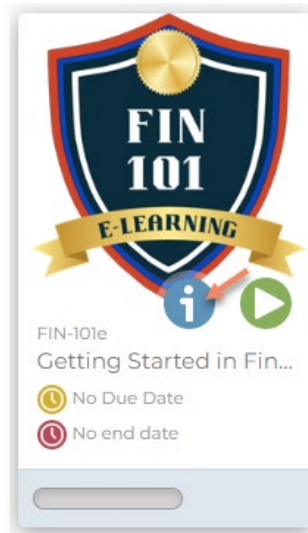
Note: As you scroll down, you will find the extended learning links which, when clicked, will direct you to the BEST Customer Resource Center (CRC) to find additional help and support. You must register for a CRC account to access these resources.

Step 2

Scroll down to the Modules section. To begin the first lesson, select the green "play" [] icon. The course will launch in a new window from within the application. Do not close any windows. Complete the lesson and select the green "play" icon to go on to the next lesson. Continue until all the lessons are complete.

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Step 3

You will receive a certificate of completion in the My Dashboard tab, under Certificates. View, Print, or save the certificate as a PDF.

Tips for Taking E-Learning Courses

If you elect to complete one of our on-demand, self-guided E-Learning courses. Keep these tips in mind for the best possible training experience.
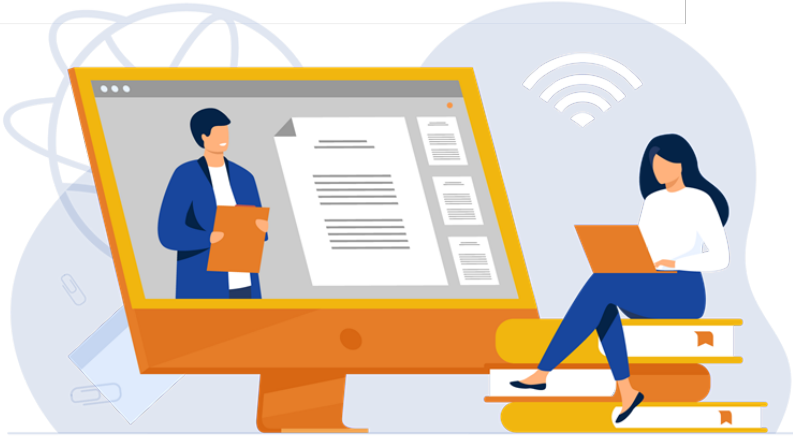
Figure 11: Tips for Taking E-Learning Courses

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2022-2023 Training Calendar

September 2022

Day	Date	Time	Class Title	Location
Tuesday	09/06/22	9:00 a.m. – 12:00 p.m.	FIN 101 Getting Started in FIN	Online
Tuesday	09/06/22	8:30 a.m. – 11:30 a.m.	FIN 200 Requisitions	Online
Wednesday	09/07/22	8:30 a.m. – 10:30 a.m.	FIN 501 Inventory Requestor	Online
Tuesday	09/13/22	8:30 a.m. – 10:00 a.m.	FIN 210 Receiving	Online
Tuesday	09/13/22	9:00 a.m. – 12:00 p.m.	FIN 120 Requisition Approvals	Online
Wednesday	09/14/22	9:00 a.m. – 4:00 p.m.	FIN 301 Accounts Payable	Online
Thursday	09/15/22	8:30 a.m. – 12:30 p.m.	FIN 510 Inventory Management	Online
Friday	09/16/22	9:00 a.m. – 12:00 p.m.	FIN 130 FIN for Managers	Online
Tuesday	09/20/22	8:30 a.m. – 12:30 p.m.	FIN 220 Purchasing	Online
Wednesday	09/21/22	9:00 a.m. – 12:00 p.m.	FIN 360 Accounts Payable for Interface Agencies	Online
Thursday	09/22/22	9:00 a.m. – 12:00 p.m.	FIN 701 Accounts Receivable	Online
Tuesday	09/27/22	1:00 p.m. – 2:00 p.m.	FIN 150 infoAdvantage Reports	Online
Wednesday	09/28/22	9:00 a.m. – 12:00 p.m.	FIN 110 Vendor Management	Online

October 2022

Day	Date	Time	Class Title	Location
Tuesday	10/04/22	8:30 a.m. – 11:30 a.m.	FIN 200 Requisitions	Online
Tuesday	10/04/22	2:00 p.m. – 5:00 p.m.	FIN 120 Requisition Approvals	Online
Wednesday	10/05/22	8:30 a.m. – 10:30 a.m.	FIN 501 Inventory Requestor	Online
Thursday	10/06/22	9:00 a.m. – 12:00 p.m.	FIN 801 Fixed Assets	Online
Monday	10/10/22	9:00 a.m. – 12:00 p.m.	FIN 130 FIN for Managers	Online
Tuesday	10/11/22	8:30 a.m. – 10:00 a.m.	FIN 210 Receiving	Online
Wednesday	10/12/22	9:00 a.m. – 4:00 p.m.	FIN 301 Accounts Payable	Online
Thursday	10/13/22	8:30 a.m. – 12:30 p.m.	FIN 510 Inventory Management	Online
Thursday	10/13/22	1:00 p.m. – 4:00 p.m.	FIN 401 General Ledger	Online
Tuesday	10/18/22	8:30 a.m. – 12:30 p.m.	FIN 220 Purchasing	Online
Wednesday	10/19/22	9:00 a.m. – 12:00 p.m.	FIN 360 Accounts Payable for Interface Agencies	Online
Thursday	10/20/22	9:00 a.m. – 12:00 p.m.	FIN 701 Accounts Receivable	Online
Tuesday	10/25/22	9:00 a.m. – 10:00 a.m.	FIN 150 infoAdvantage Reports	Online
Wednesday	10/26/22	9:00 a.m. – 12:00 p.m.	FIN 110 Vendor Management	Online

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November 2022

Day	Date	Time	Class Title	Location
Tuesday	11/01/22	8:30 a.m. – 11:30 a.m.	FIN 200 Requisitions	Online
Tuesday	11/01/22	9:00 a.m. – 12:00 p.m.	FIN 120 Requisition Approvals	Online
Wednesday	11/02/22	8:30 a.m. – 10:30 a.m.	FIN 501 Inventory Requestor	Online
Wednesday	11/02/22	1:30 p.m. – 4:30 p.m.	FIN 701 Accounts Receivable	Online
Thursday	11/03/22	9:00 a.m. – 12:00 p.m.	FIN 130 FIN for Managers	Online
Monday	11/07/22	9:00 a.m. – 12:00 p.m.	AP - Payment Hold Processing	Online
Tuesday	11/08/22	8:30 a.m. – 10:00 a.m.	FIN 210 Receiving	Online
Tuesday	11/08/22	1:00 p.m. – 4:00 p.m.	FIN 101 Getting Started in FIN	Online
Wednesday	11/09/22	9:00 a.m. – 4:00 p.m.	FIN 301 Accounts Payable	Online
Monday	11/14/22	1:30 p.m. – 4:00 p.m.	FIN 310 Payroll & Other Tax Payments	Online
Tuesday	11/15/22	8:30 a.m. – 12:30 p.m.	FIN 220 Purchasing	Online
Tuesday	11/15/22	1:30 p.m. – 4:30 p.m.	FIN 601 Budget Control	Online
Wednesday	11/16/22	9:00 a.m. – 12:00 p.m.	FIN 360 Accounts Payable for Interface Agencies	Online
Thursday	11/17/22	8:30 a.m. – 12:30 p.m.	FIN 510 Inventory Management	Online
Thursday	11/17/22	9:00 a.m. – 12:00 p.m.	FIN 110 Vendor Management	Online
Tuesday	11/29/22	1:00 p.m. – 2:00 p.m.	FIN 150 infoAdvantage Reports	Online

January 2023

Day	Date	Time	Class Title	Location
Tuesday	01/03/23	8:30 a.m. – 11:30 a.m.	FIN 200 Requisitions	Online
Tuesday	01/03/23	9:00 a.m. – 12:00 p.m.	FIN 101 Getting Started in FIN	Online
Wednesday	01/04/23	8:30 a.m. – 10:30 a.m.	FIN 501 Inventory Requestor	Online
Tuesday	01/10/23	8:30 a.m. – 10:00 a.m.	FIN 210 Receiving	Online
Tuesday	01/10/23	9:00 a.m. – 12:00 p.m.	FIN 120 Requisition Approvals	Online
Tuesday	01/10/23	1:00 p.m. – 5:00 p.m.	FIN 401 General Ledger	Online
Wednesday	01/11/23	9:00 a.m. – 12:00 p.m.	FIN 110 Vendor Management	Online
Thursday	01/12/23	8:30 a.m. – 12:30 p.m.	FIN 510 Inventory Management	Online
Thursday	01/12/23	9:00 a.m. – 12:00p.m.	FIN 130 FIN for Managers	Online
Tuesday	01/17/23	8:30 a.m. – 12:30 p.m.	FIN 220 Purchasing	Online
Wednesday	01/18/23	9:00 a.m. – 4:00 p.m.	FIN 301 Accounts Payable	Online
Thursday	01/19/23	9:00 a.m. – 12:00 p.m.	FIN 701 Accounts Receivable	Online
Wednesday	01/25/23	9:00 a.m. – 12:00 p.m.	FIN 360 Accounts Payable for Interface Districts	Online
Tuesday	01/31/23	1:00 p.m. – 2:00 p.m.	FIN 150 infoAdvantage Reports	Online

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February 2023

Day	Date	Time	Class Title	Location
Wednesday	02/01/23	9:00 a.m. – 12:00 p.m.	FIN 110 Vendor Management	Online
Monday	02/06/23	9:00 a.m. – 12:00 p.m.	AP - Payment Hold Processing	Online
Tuesday	02/07/23	8:30 a.m. – 11:30 a.m.	FIN 200 Requisitions	Online
Tuesday	02/07/23	2:00 p.m. – 5:00 p.m.	FIN 120 Requisition Approvals	Online
Wednesday	02/08/23	8:30 a.m. – 10:30 a.m.	FIN 501 Inventory Requestor	Online
Wednesday	02/08/23	9:00 a.m. – 12:00 p.m.	BUD 101 Budget Development	Online
Thursday	02/09/23	9:00 a.m. – 12:00 p.m.	FIN 130 FIN for Managers	Online
Thursday	02/09/23	1:30 p.m. – 4:00 p.m.	FIN 310 Payroll & Other Tax Payments	Online
Friday	02/10/23	1:30 p.m. – 4:00 p.m.	FIN 310 Payroll & Other Tax Payments	Online
Tuesday	02/14/23	8:30 a.m. – 10:00 a.m.	FIN 210 Receiving	Online
Tuesday	02/14/23	1:30 p.m. - 4:30 p.m.	FIN 601 Budget Control	Online
Wednesday	02/15/23	9:00 a.m. – 12:00 p.m.	BUD 101 Budget Development	Online
Wednesday	02/15/23	9:00 a.m. – 4:00 p.m.	FIN 301 Accounts Payable	Online
Thursday	02/16/23	8:30 a.m. – 12:30 p.m.	FIN 510 Inventory Management	Online
Thursday	02/16/23	9:00 a.m. – 12:00 p.m.	BUD 101 Budget Development	Online
Tuesday	02/21/23	8:30 a.m. – 12:30 p.m.	FIN 220 Purchasing	Online
Wednesday	02/22/23	9:00 a.m. – 12:00 p.m.	FIN 360 Accounts Payable for Interface Agencies	Online
Wednesday	02/22/23	9:00 a.m. – 12:00 p.m.	BUD 101 Budget Development	Online
Thursday	02/23/23	9:00 a.m. – 12:00 p.m.	FIN 701 Accounts Receivable	Online
Thursday	02/23/23	1:30 p.m. – 4:00 p.m.	FIN 310 Payroll & Other Tax Payments	Online
Tuesday	02/28/23	9:00 a.m. – 10:00 a.m.	FIN 150 infoAdvantage Reports	Online

March 2023

Day	Date	Time	Class Title	Location
Wednesday	03/01/23	9:00 a.m. – 12:00 p.m.	FIN 110 Vendor Management	Online
Tuesday	03/07/23	8:30 a.m. – 11:30 a.m.	FIN 200 Requisitions	Online
Tuesday	03/07/23	1:00 p.m. – 4:00 p.m.	FIN 101 Getting Started in FIN	Online
Wednesday	03/08/23	8:30 a.m. – 10:30 a.m.	FIN 501 Inventory Requestor	Online
Thursday	03/09/23	9:00 a.m. – 12:00 p.m.	FIN 701 Accounts Receivable	Online
Tuesday	03/14/23	8:30 a.m. – 10:00 a.m.	FIN 210 Receiving	Online
Tuesday	03/14/23	2:00 p.m. – 5:00 p.m.	FIN 120 Requisition Approvals	Online
Wednesday	03/15/23	9:00 a.m. – 4:00 p.m.	FIN 301 Accounts Payable	Online
Thursday	03/16/23	8:30 a.m. – 12:30 p.m.	FIN 510 Inventory Management	Online
Thursday	03/16/23	2:00 p.m. – 5:00 p.m.	FIN 130 FIN for Managers	Online
Tuesday	03/21/23	8:30 a.m. – 12:30 p.m.	FIN 220 Purchasing	Online
Wednesday	03/22/23	9:00 a.m. – 12:00 p.m.	FIN 360 Accounts Payable for Interface Agencies	Online
Thursday	03/23/23	9:00 a.m. – 12:00 p.m.	FIN 801 Fixed Assets	Online
Tuesday	03/28/23	1:00 p.m. – 2:00 p.m.	FIN 150 infoAdvantage Reports	Online

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April 2023

Day	Date	Time	Class Title	Location
Tuesday	04/04/23	8:30 a.m. – 11:30 a.m.	FIN 200 Requisitions	Online
Wednesday	04/05/23	8:30 a.m. – 10:30 a.m.	FIN 501 Inventory Requestor	Online
Tuesday	04/11/23	8:30 a.m. – 10:00 a.m.	FIN 210 Receiving	Online
Tuesday	04/11/23	2:00 p.m. – 5:00 p.m.	FIN 120 Requisition Approvals	Online
Wednesday	04/12/23	9:00 a.m. – 12:00 p.m.	FIN 110 Vendor Management	Online
Thursday	04/13/23	8:30 a.m. – 12:30 p.m.	FIN 510 Inventory Management	Online
Thursday	04/13/23	9:00 a.m. – 12:00 p.m.	FIN 130 FIN for Managers	Online
Thursday	04/13/23	1:00 p.m. – 4:00 p.m.	FIN 401 General Ledger	Online
Tuesday	04/18/23	8:30 a.m. – 12:30 p.m.	FIN 220 Purchasing	Online
Wednesday	04/19/23	9:00 a.m. – 4:00 p.m.	FIN 301 Accounts Payable	Online
Thursday	04/20/23	9:00 a.m. – 12:00 p.m.	FIN 701 Accounts Receivable	Online
Tuesday	04/25/23	9:00 a.m. – 10:00 a.m.	FIN 150 infoAdvantage Reports	Online
Wednesday	04/26/23	9:00 a.m. – 12:00 p.m.	FIN 360 Accounts Payable for Interface Agencies	Online

May 2023

Day	Date	Time	Class Title	Location
Tuesday	05/02/23	8:30 a.m. – 11:30 a.m.	FIN 200 Requisitions	Online
Tuesday	05/02/23	9:00 a.m. – 12:00 p.m.	FIN 101 Getting Started in FIN	Online
Wednesday	05/03/23	8:30 a.m. – 10:30 a.m.	FIN 501 Inventory Requestor	Online
Wednesday	05/03/23	9:00 a.m. – 12:00 p.m.	FIN 110 Vendor Management	Online
Thursday	05/04/23	9:00 a.m. – 12:00 p.m.	FIN 701 Accounts Receivable	Online
Tuesday	05/09/23	8:30 a.m. – 10:00 a.m.	FIN 210 Receiving	Online
Tuesday	05/09/23	1:30 p.m. – 4:30 p.m.	FIN 601 Budget Control	Online
Tuesday	05/09/23	2:00 p.m. – 5:00 p.m.	FIN 120 Requisition Approvals	Online
Thursday	05/11/23	8:30 a.m. – 12:30 p.m.	FIN 510 Inventory Management	Online
Thursday	05/11/23	9:00 a.m. – 12:00 p.m.	FIN 130 FIN for Managers	Online
Thursday	05/11/23	1:30 p.m. – 4:00 p.m.	FIN 310 Payroll & Other Tax Payments	Online
Tuesday	05/16/23	8:30 a.m. – 12:30 p.m.	FIN 220 Purchasing	Online
Wednesday	05/17/23	9:00 a.m. – 4:00 p.m.	FIN 301 Accounts Payable	Online
Wednesday	05/24/23	9:00 a.m. – 12:00 p.m.	FIN 360 Accounts Payable for Interface Agencies	Online
Tuesday	05/30/23	1:00 p.m. – 2:00 p.m.	FIN 150 infoAdvantage Reports	Online

June 2023

Day	Date	Time	Class Title	Location
Tuesday	06/06/23	1:00 p.m. – 4:00 p.m.	FIN 101 Getting Started in FIN	Online
Tuesday	06/27/23	9:00 a.m. – 10:00 a.m.	FIN 150 infoAdvantage Reports	Online

Los Angeles County Office of Education

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Business Enhancement System Transformation (BEST) Project
https://bestcrc.lacoe.edu

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