



ADVANTAGE Financial System Training

The Financial Services Office provides training on the Advantage financial accounting system used by Arizona State University faculty and staff to order goods and services; bill departments for goods and services provided; and financially manage state, local and Sponsored Program research accounts.

The Advantage training program consists of training courses designed to meet specific needs of a variety of Advantage users at all levels and at all locations. Courses are offered as a progressive series of classes to support the following work functions:

- **Data Entry:** for those employees who order goods and services from various on- and off-campus providers
- **Administrators:** for those faculty and administrators who must approve documents online or look up budget information on a regular or infrequent basis
- **Managers:** for those who are responsible for the fiscal management of an account.

A full range of classes, which combine the presentation of basic concepts and options with hands-on practice, are offered throughout the year on the main campus; see the next page of this document for detailed descriptions of each course.

Courses are also offered for processing departments, including Accounts Payable, Travel, Purchasing, Financial Services accountants, Grant and Contract accountants and officers and individuals with limited usage.

Table 1 shows the recommended courses for categories of users based on job duties.

Data Entry	Administrators	Managers
Introduction to Advantage	Introduction to Advantage	Introduction to Advantage
Order Processing I, II, III		Order Processing I, II, III (required for those who input documents)
		Managing Advantage Accounts
		Advantage Transfer Documents
		Financial Data Warehouse (Related course – see page 2)

Table 1 - Recommended Training Sequence by Job Category

Registration: New and existing Advantage users may register for Advantage training classes through the HR Employee Training website at <http://cfo.asu.edu/hr-development> or by contacting Leadership & Workforce Development at 480.965.4751, lwd@asu.edu. Please contact the Advantage Helpline at 480.965.2334 or send an email to AdvantageHelp@asu.edu for additional information or to ask questions regarding Advantage Training Courses. To obtain an Advantage user ID, you must submit an online request for an Advantage Access form, which may be found at <https://forms.asu.edu>.

Special Training Needs: Departments and individuals with training needs in Advantage that are not covered in the courses listed above may contact the Advantage Helpline at 480.965.2334, or via e-mail at AdvantageHelp@asu.edu.

Description of Advantage Training Courses

Introduction to Advantage Financial System: This class is for individuals who need a basic introduction to the Advantage financial system. This is a self-paced computer-based instruction course that introduces participants to the Advantage financial system. Topics include an overview of the Advantage system and how it is used at ASU, as well as hands-on practice for getting started in Advantage. Participants learn how to retrieve documents from the Suspense file, approve, unapprove and correct online documents. The estimated time to complete this course is 6-8 hours, depending on the individual's computer skills and experience. **This class is a prerequisite to all other Advantage courses.** No prior Advantage or computer knowledge is required for this class.

Advantage Financial Order Processing: Effective July 1, 2007, the Advantage Order Processing Series has been broken down into three independent sections (Advantage Financial Order Processing I, II and III) focusing on the different order processing documents. The Advantage Order Processing sections (Part I, II and III) can be taken in their entirety or separately. Ordering Processing Documents provides participants with practical experience processing documents (PD, PO, PV, RC, RX and VE) and looking up information on tables. This course is essential for those who prepare and process documents to request goods and services from on- and off-campus suppliers. **Prerequisite: Introduction to Advantage Financial System**

Managing Accounts in Advantage: This is a half-day class that provides a basic understanding of Advantage information available for financially managing state, local and sponsored program research accounts. Reviewing account manager responsibilities, accessing the budget tables and the financial web reports and special considerations for reconciling at year-end are also covered in this class. Participants receive worksheets and control logs, which they may duplicate and use to reconcile accounts in their work units. Workshop exercises are also utilized to provide trainees with practice in looking up balances and reconciling appropriation units for state and local accounts. **Prerequisite: Introduction to Advantage Financial System**

Advantage Transfer Documents: The Advantage Transfer Documents class teaches users who are already experienced in preparing Advantage documents and with some budget knowledge to the processes, procedures and conditions for using and completing account transfer documents, such as A1, IX, J1 and TV documents. A self-paced, computer-based tutorial is supplemented with hands-on workshops for practice on the Advantage training system with assistance from trainers as needed. The time to complete this course varies with individuals. The session is scheduled for a full day, but many participants complete the materials within 5-7 hours. **Prerequisites: Introduction to Advantage Financial System.** Participants who sign up for this class should have a basic understanding of how to process documents to request goods and services or have completed the Advantage Order Processing Documents Series prior to attending this training.

Related Financial Data Warehouse Courses:

Financial Data Warehouse: For information on this course, please use the link below.

<https://lms.asu.edu/stc/employee/psciis.dll?COURSE=employee&CODE=ASUOPS1170>