



September 2, 2022

**To:** Business and Accounting Administrators  
Los Angeles County K-12 School and Community College Districts  
and Charter Schools

**From:** Mitos Quejada, Enterprise Financial Systems Consultant  
District Support  
Division of School Financial Services

**Subject:** Schedule for BEST Advantage Systems Training

The Los Angeles County Office of Education (LACOE) will be offering training classes for the Business Enhancement System Transformation (BEST) Advantage System.

Course offerings for the different business areas are included in the attached BEST Advantage System Training Catalog. The document includes course descriptions and training schedules.

Registration for these training classes is done ONLINE through the following link to the BEST Advantage Training LMS (Learning Management System):

<https://best-lms.lacoe.edu/>

Access to this website is limited to BEST Advantage System users who have been identified by their District Security Administrator. Please contact Help Desk Support if you are unable to locate your credentials or unable to reset your password.

Users are pre-enrolled in the training courses which correspond to the job function they have in the BEST Advantage System. Users will need to register for a webinar session date and time in at least five (5) business days in advance. These courses are listed under your learning activities.

Classes will be filled on a first-come, first-served basis. There are operational limitations within LACOE as to dates, speaker availability, facility use, etc. If a person is registered for a class and is unable to attend, the registration must be cancelled at least three (3) days before the scheduled training date. Please refer to the BEST Customer Resource Center (CRC) Learning Guide for instructions on how to cancel your registrations or contact the Help Desk Support at (562) 922-8888 or [helpdesk@lacoe.edu](mailto:helpdesk@lacoe.edu) if you need assistance with canceling your registration the three (3) days before an event. If not cancelled within this timeframe, the person will be

considered a no-show. A No-Show Training Report will be reported quarterly to the Chief Business Official of the district.

An email will be sent to registered participants one business day prior to the scheduled training date. The email will include the webinar link and other training documents, as applicable.

Register for the BEST Customer Resource Center (CRC) through the following link to access the Learning Guide, training calendar, and more:

<https://bestcrc.lacoe.edu/>

**IMPORTANT NOTICE:** Please be advised that at this time, registration for sessions is only available through October 2022. Additionally, due to an exciting system upgrade, the BEST Advantage Training LMS will be unavailable from September 20-30. Users will NOT be able to register for webinar sessions or complete e-learning during this window. You are encouraged to register for sessions through October 2022 and complete any e-learning courses prior to September 20.

**The new BEST Advantage Training LMS will be available again on October 3, 2022 and at that time, users will be able to register for training through the end of the fiscal year.**

We hope you will find these training classes helpful, and we welcome all suggestions. Please email suggestions to [BEST\\_Training@lacoe.edu](mailto:BEST_Training@lacoe.edu). Additional classes may be added if the need arises.

If you have questions about the classes or this bulletin, please email Lupe Martinez at [Martinez\\_Guadalupe@lacoe.edu](mailto:Martinez_Guadalupe@lacoe.edu).

Approved:  
Nkeiruka Benson, Director  
Division of School Financial Services

MQ:lt  
Attachment

SFS-A10-2022-2023

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# BEST Advantage System Training Catalog

2022-2023

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Attachment to:  
Info. Bul. No. 6588  
SFS-A10-2022-2023



**Los Angeles County  
Office of Education**

Serving Students • Supporting Communities • Leading Educators

Business Enhancement System Transformation (BEST) Project

<https://bestcrc.lacoe.edu>

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## Training Course Formats

### Instructor-led Trainings, Webinars, and eLearning

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 10<sup>th</sup> 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 eLearning courses (e) you can take at your own pace. You are able to take both versions (webinar & eLearning), but are only required to take one or the other.

Instructor-led Webinars (w)	eLearning 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 eLearning 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 1: BEST Project: Training Course Formats*



## Class Offerings

Click on course name to navigate to course description and schedule.

\*Courses for leadership

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



# 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
<a href="#">Fast Functions</a>	<a href="#">Training Guides</a>	
<a href="#">Quick Reference Guides</a>		



## 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
 <a href="#">Fast Functions</a>	 <a href="#">Training Guides</a>	 <a href="#">Knowledge Base</a>
 <a href="#">Quick Reference Guides</a>		
 <a href="#">Recipe Cards</a>		



## 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 eLearning course that you can take on your own schedule and at your own pace. Completion of the eLearning course will fulfill the requirement to grant access to the BEST Advantage System – Financial (FIN).

### 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

## Resources



### [Training Guides](#)

[FIN-101: Getting Started Course Guide](#)



### [Computer Based Trainings](#)

[Approvals & Workflow](#)



### [Recipe Cards](#)

[Manage Favorites](#)

[Create a Document Template](#)



## FIN 102e Getting Started in Financial for Interface Agencies

The Getting Started in Financial for Interface is an eLearning 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 eLearning 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 eLearning course that you can take on your own schedule and at your own pace. Completion of the eLearning course will fulfill the requirement to grant access to the BEST Advantage System – Financial (FIN).

### 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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### Resources



#### [Training Guides](#)

[FIN-101: Getting Started Course Guide](#)



#### [Computer Based Trainings](#)

[Approvals & Workflow](#)



## 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				



## 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 eLearning course that you can take on your own schedule and at your own pace. Completion of the eLearning 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.

### 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				

### 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](#)



## 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 fulfills the requirement to grant access to the BEST Advantage System – Financial (FIN).

### 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		

## 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](#)



## 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).

### 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			

### Resources



#### [Training Guides](#)

[FIN-150: infoAdvantage Reports for FIN](#)



## 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 eLearning course that you can take on your own schedule and at your own pace. Completion of the eLearning 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.

### 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				

## 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](#)





## 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	10/11/22	11/08/22	01/10/23	02/14/23
	03/14/23	04/11/23	05/09/23		

### Resources



#### [Training Guides](#)

[FIN-210: Receiving Course Guide](#)



## 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
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## 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](#)



## 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](#)



**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				



## 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 one hour.

### 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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### Resources



#### [Training Guides](#)

[FIN-310: Payroll and Other Tax Payments Course Guide](#)



## 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.

### 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				

### Resources



#### [Training Guides](#)

[FIN-360: Accounts Payable for Interface Districts](#)



#### [Quick Reference Guides](#)

[QRG: Commonly Used Documents and Reports for Interface Agencies](#)



## 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
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## 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](#)





## 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.

### 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		

### Resources



#### [Training Guides](#)

[FIN-501: Inventory Warehouse Requestor Course Guide](#)



#### [Computer Based Trainings](#)

[CBT: Create a Stock Request \(XSRQ\)](#)



## 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.

### 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	10/13/22	11/10/22	01/12/23	02/16/23
	03/16/23	04/13/23	05/11/23	05/18/23	

### Resources



#### [Training Guides](#)

[FIN-510: Inventory Management Course Guide](#)



#### [Computer Based Trainings](#)

[CBT: Create a Stock Request \(XSRQ\)](#)



## 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

### Course Schedule

FIN-601w	11/15/22	02/14/23	05/09/23
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### 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?](#)



## 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 of 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

### 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				

### 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](#)



## 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.

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 through 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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### Resources



#### [Training Guides](#)

[FIN-801: Fixed Assets Course Guide](#)



## 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. – 11:00 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	8:30 a.m. – 12:30 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. – 10:00 a.m.	FIN 501 Inventory Requestor	Online
Thursday	10/06/22	8:30 a.m. – 12:30 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	8:30 a.m. – 12:30 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



**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	1:00 p.m. – 5:00 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
Thursday	11/10/22	8:30 a.m. – 12:30 p.m.	FIN 510 Inventory Management	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	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	8:30 a.m. – 12:30 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





**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. – 12:30 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
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. – 12:30 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. – 12:30 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. – 12:30 p.m.	BUD 101 Budget Development	Online
Thursday	02/23/23	8:30 a.m. – 12:30 p.m.	FIN 701 Accounts Receivable	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	8:30 a.m. – 12:30 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	8:30 a.m. – 12:30 p.m.	FIN 801 Fixed Assets	Online
Tuesday	03/28/23	1:00 p.m. – 2:00 p.m.	FIN 150 infoAdvantage Reports	Online





**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.	FIN130 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	8:30 a.m. – 12:30 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	8:30 a.m. – 12:30 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
Thursday	05/18/23	8:30 a.m. – 12:30 p.m.	FIN 510 Inventory Management	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

