

University of North Carolina  
Wilmington

**Using the  
Finance Training System**

# Table of Contents

<b>Overview</b>	3
<b>My Enrollments</b>	3
Withdraw from a Course or Test Out Session	3
<b>My Certificates</b>	3
<b>My Training History</b>	4
<b>Course Calendar</b>	4
Instructor Led	4
Skillport CBT	4
<b>Enroll in a Course</b>	5
Instructor Led	5
Skillport CBT	5
Test Out	5

## Overview

The Finance Training System facilitates the enrollment process for Finance Certificate Training Program courses. Also included in the system are screens that assist with tracking your training history and the status of certificate level completions.

Tabs are located at the top of the main screen and are described here:

<a href="#">My Enrollments</a>	<a href="#">My Certificates</a>	<a href="#">My Training History</a>	<a href="#">Course Calendar</a>	<a href="#">Enroll in a Course</a>
--------------------------------	---------------------------------	-------------------------------------	---------------------------------	------------------------------------

## My Enrollments

The *My Enrollments* screen displays all current enrollments in a finance course or a test out session including courses selected for test out. Enrollments are sorted and displayed in alphabetical order by the course name. Other important information such as Instructor, Enrollment Status, Course Start Date and Location are shown.

### Withdraw from a Course or Test Out Session

To withdraw from a course or test out enrollment:

1. Simply click the Withdraw link adjacent to the course or test out that is not needed/cannot attend.

Course	
<a href="#">Withdraw</a>	ACT101 - Introduction to Accounting

- a. A system message will appear requesting confirmation of the withdrawal.
2. Click OK to proceed with the withdrawal or Cancel to cancel the withdrawal.
    - a. After clicking OK, the course or test out will be removed from the My Enrollments screen.
    - b. An email confirming the withdrawal will be sent to the enrollee's campus email.

## My Certificates

The *My Certificates* screen displays the status of your certificate completions. With this screen, you will be able to identify the courses that are required for a specific level and your individual status for the courses. Below is an example of the course requirement status for Level 3.

Level 3	ACT301	Enrolled
	ACT302	Completed
	ACT303	Requirement Needed
	BAN301	Completed
	BGT301	Completed
	BGT302	Completed
	BGT305	Requirement Needed
	PUR301	Completed
	PUR302	Completed

## My Training History

The *My Training History* screen displays your training history including the class title, attendance status, class start date and date enrolled. History is displayed in class title order. A sample of training history is shown here.

Class Title	Attendance Status	Class Start	Date Enrolled
ACT101 - Introduction to Accounting	Withdrawn	4/3/2009 9:00 AM	3/6/2009
ACT102 - AP-Paying the Bills	Completed	2/5/2009 2:00 PM	1/29/2009
ACT103 - Introduction to UNCW Travel	Withdrawn	Online	1/29/2009
ACT103 - Introduction to UNCW Travel	Completed	Online	3/6/2009
ACT104 - General and Trust Funds	Completed	2/24/2009 9:00 AM	1/29/2009
ACT201 - UNCW Employee Travel	Completed	Online	3/6/2009
ACT202 - Using UNCW E-Travel	Completed	4/28/2009 2:00 PM	3/6/2009
ACT301 - Journal Entries	Completed	4/8/2009 9:00 AM	3/6/2009
ACT302 - Understanding Interdept'l Transactions	Withdrawn	3/26/2009 9:00 AM	3/26/2009

## Course Calendar

The *Course Calendar* screen displays the training program calendar. This screen provides one of the two ways to enroll in a course (see *Enroll in a Course* below for another enrollment option). This screen allows the enrollee to register for an instructor led or Skillport CBT course as follows:

### Instructor Led

1. Find the course you wish to attend.
2. Click on the course name. A course information screen will appear.
3. Click *Enroll in this Course*.
  - a. The course will be added to your enrollments and can be viewed on the *My Enrollments* screen.
  - b. The system will send an email confirmation of the enrollment.
4. Add the course to your personal calendar as needed.

**Note:** "This class capacity is full." will display on the course information enrollment screen when class capacity has been reached.

### Skillport CBT

Online courses are offered in Skillport CBT and can be accessed through the My Seaport portal at <https://myseaport.uncw.edu/web/mycampus/home>.

Enrollment in a Skillport CBT course via the Finance Training System is not required but is highly recommended. Skillport courses are displayed on the *Course Calendar* on the first day of each quarter, January 1<sup>st</sup>, April 1<sup>st</sup>, July 1<sup>st</sup> and October 1<sup>st</sup> and are identified with a location of Skillport.

<u>1</u> <a href="#">ACT103 - Introduction to UNCW Travel</a> <a href="#">Skillport</a>
<a href="#">ACT106 - Taxation Overview</a> <a href="#">Skillport</a>

To enroll in a Skillport CBT course via the Course Calendar:

1. Select the course date for the quarter.
2. Click on the course name. A course information screen will appear.
3. Click *Enroll in this Skillport Course*. Instructions for accessing and searching for a Skillport class will display.
  - a. The course will be added to your enrollments and can be viewed on the *My Enrollments* screen.
  - b. The system will send an email confirmation of the enrollment.
4. Attend the Skillport course at your earliest convenience.
  - a. Course attendance will be tracked and recorded by the Training Administrator.

## **Enroll in a Course (including Skillport CBT and Test Out)**

The *Enroll in a Course* screen is used to enroll in finance program courses by level. This screen allows the enrollee to register for an instructor led or Skillport CBT course or a test out session.

### **Instructor Led**

To enroll in an instructor led course:

1. Click on the *Enroll in a Course* option on the main toolbar.
2. Click on the *Attend Course* button.
3. Select the level: Finance Level 1, Finance Level 2 or Finance Level 3.
4. Courses that are available for that level will display. Included are the start/end dates, course status, capacity, seats available, instructor's name and course description for each scheduled course.
5. Click on the *Enroll* button to the left of the course needed.
  - a. The words *Currently Enrolled* will display beside the course selected.
  - b. The course will be added to your enrollments and can be viewed on the *My Enrollments* screen.
  - c. The system will send an email confirmation of the enrollment.
6. Add the course to your personal calendar as needed.

### **Skillport CBT**

Online courses are offered in Skillport CBT and can be accessed through the My Seaport portal at <https://myseaport.uncw.edu/web/mycampus/home>.

Enrollment in a Skillport CBT course via the Finance Training System is not required but is highly recommended. To enroll in a Skillport CBT course:

1. Click on the *Enroll in a Course* option on the main toolbar.
2. Click on the *Attend Course* button.
3. Select the level: Finance Level 1, Finance Level 2 or Finance Level 3. Skillport courses that are available for that level will display and can be identified with a start/end date equal to "Online" and instructor equal to "Skillport".
4. Click on the *Enroll* button to the left of the course needed.
  - a. Instructions for accessing and searching for a Skillport class will display.
  - b. The course will be added to your enrollments and can be viewed on the *My Enrollments* screen.
  - c. The system will send an email confirmation of the enrollment.
5. Attend the Skillport course at your earliest convenience.
  - a. Course attendance will be tracked and recorded by the Training Administrator.

## **Test Out**

To enroll in a test out session:

1. Click on the *Enroll in a Course* option on the main toolbar.
2. Click on the *Test Out* button.
3. Click on the *Select Session* button to the left of the desired session date/time.
4. From the drop down list, select the course(s) you would like to test out of during the session.
  - a. Note: Number of courses to test out is unlimited.
5. Scroll to the bottom of the screen and click the *Test Out of These Courses During the Session* button.
  - a. The test out session and the selected courses will be added to your enrollments and can be viewed on the *My Enrollments* screen.
  - b. The system will send an email confirmation of the test out session and courses selected.
6. Add the test out session to your personal calendar.

**Note:** A red stop sign icon  will display on the Enroll in a Course screen when class capacity has been reached.