

# Accessing Financial Services Online Courses

## 1. Navigate to the Online Learning page of [finance.wfu.edu](http://finance.wfu.edu)

- From the left side menu, click Training Resources, and then Online Learning.

- Home
- Vision and Mission
- Students & Parents
- Faculty & Staff
- Suppliers
- Audited Financial Statements
- Forms
- Policies & Procedures
- Training Resources** 
- ONLINE LEARNING 
- Contact Financial Services

## 2. Log in with your WIN credentials

- When the Online Learning page displays, click the link that says, “Use this link to log in with your WIN credentials.”
- NOTE:** You must either be on a campus network or connected via VPN to access these courses.

## Online Learning

The following courses have been developed to provide an on-demand, self-paced option for Financial Services learning opportunities. Click any course title to learn more about the course and complete it. We will add to this list as more online courses are developed.



### Accessing Finance Online Learning Courses:

[Use this link to log in](#) with your WIN credentials.

- Once logged in, you will be returned to this screen to click the ‘Begin Course’ link under the course description that you want to access.
- Be sure that your pop-up blocker is disabled.
- If you have difficulty accessing a course, [email Jennifer Rogers](mailto:jrogers@wfu.edu) for assistance.
- Begin the course!

## 3. Begin the course

- Once logged in, you will be returned to the online learning page. Scroll down to the course offerings section and click the ‘Begin Course’ link for the course of your choice.
- NOTE:** If for some reason you are returned to the Financial Services home page, simply follow step one again to return to the online learning page.

### Course Offerings

#### Sales Tax and the University PCard

This tutorial provides information and hands-on practice opportunities related to knowing when to break out North Carolina sales tax on your PCard transactions, as well as how to accurately calculate the tax amount.

[Begin Course](#)

#### PCard Refresher Training

This is an online, self-paced course that will cover when to use your University credit card, NC sales tax and documentation requirements. In order to maintain an active PCard, cardholders are required to complete this training every three years, starting three years after their original PCard training.

[Begin PCard Refresher Course](#)

#### How We Do Business at Wake

This course is an orientation to how we conduct financial business at Wake Forest. It is intended to provide the key information that those with financial responsibilities as part of their role need to know within their first thirty days. It can also be used as a high level refresher for information that is used infrequently.

[Begin Course](#)

## Financial Services Quick Guide Library [finance.wfu.edu](http://finance.wfu.edu)

**Responsible Unit:**  
Finance Systems

**Additional Assistance:**  
336-758-5648

### What is it?

Provides a quick tutorial on how to access the online learning courses for Financial Services.

### Why it is Necessary

Helps users quickly and efficiently access the information they need to access training.