

UW Connect Finance Portal Landing Page

The menu bar has been simplified to get you to the pages and resources you use most.

UW Connect Finance Portal

Find training, policy, and technical documentation supporting finance activities within the University of Washington

Search for Knowledge Articles

[For Request Forms Click Here](#)

Browse Knowledge Base by Category

Accounting

Accounting Adjustments
FDM Bootcamp Series
FDM Concepts
Funding and Transfers
Workday Guidance

Accounts Payable

Banking and Cash Management

Reconciliation and Reporting
Specialized Topics

Budgeting

Adaptive Planning Basics
Adaptive Planning Features
Data Entry and Validation
Reporting and Analysis

Receivables

Assessments and Forms
Cash Management
Customer Accounts and Invoicing
Customer Contracts and Revenue
Internal Billing and Service Delivery

Service and Recharge Information

Shared Environments and Operations

Travel and Expense

Expense Report Analysis
Expense Report Creation
Expense Report Management

UW Academy Procurement

Payments and Invoicing

Primary categories are in the purple bars. Clicking on these will take you to all knowledge articles in that category.

Subcategories under the primary category allow you to drill down to specific knowledge articles.

The search bar currently returns only knowledge articles. We plan to release an integrated search later this year.

UW Connect Finance Portal Search Results

Search this site:

Refine results

Category

- > Accounting
- > General Workday

Last Modified

- Past 2 Years
- Past Year
- Past Month
- Past Week
- Past 24 Hours

View Count

- More Than 500
- More Than 200
- More Than 100
- More Than 50
- More Than 10
- Less Than 10

16 results for "fdm bootcamp" Sort by | [Relevance](#) | [Views](#) | [Newest](#) | [Alphabetical](#)

- Showing All Results
- Financial/Workday Forums and Info Sessions**
Home > FPB KB > General Workday > Specialized Functions
Deep Dive Sessions | Procurement Services (uw.edu) Shared Environment **FDM Bootcamp** Series SE leaders
Last updated: 16d ago | 471 Views
 - FDM Bootcamp Series Overview**
Home > FPB KB > Accounting > FDM Bootcamp Series
roles required Watch the Introduction video below to learn more about the **FDM Bootcamp** Series Overview below are meant to compliment the content shared in the...
Last updated: 15d ago | 189 Views
 - FDM Bootcamp Series 3.5 - Wrap Up**
Home > FPB KB > Accounting > FDM Bootcamp Series > Series 3
Security Roles Required: No specific security roles required Watch the **FDM Bootcamp** Series 3 Wrap Up Resources: The resources below are meant to compliment the content...
Last updated: 15d ago | 3 Views
 - FDM Bootcamp Series 3.4 - Net Position Recap - How to Interpret your data**
Home > FPB KB > Accounting > FDM Bootcamp Series > Series 3
Security Roles Required: No specific security roles required Watch the **FDM Bootcamp** Series 3 NetWelcome to the **FDM** Boot Camp Series 3 The goal of this series is to: To...
Last updated: 15d ago | 4 Views
 - FDM Bootcamp Series 3.3 - Net Position Example Review**
Home > FPB KB > Accounting > FDM Bootcamp Series > Series 3
security roles required Watch the **FDM Bootcamp** Series 3 Net position example video below. Core Videos are meant to compliment the content shared in the **FDM Bootcamp**...
Last updated: 15d ago | 4 Views

The search results filters allow you to refine your search results more.

The Category filter shows all the categories in which your search results live.

Clicking on one of the Last-Modified selections will refine your search to articles modified within that period.

The View Count allows you to refine your search to articles with the specified view count.

The sorting features allow you to sort by relevance, number of views, newest articles and alphabetically.

You can sort ascending or descending by clicking on the sort you want.

The breadcrumbs below the knowledge article title show you where the article lives.

You can see the last time the knowledge article was updated and how many views it has received here.

UW Connect Finance Portal Category Results

[Home](#) / [Knowledge](#) / [Accounting](#)

- Categories**
- Accounting**
- Accounting Adjustments
- FDM Bootcamp Series
- FDM Concepts
- Funding and Transfers
- Workday Guidance
- Accounts Payable
- Banking and Cash Management
- Budgeting
- Content Creator Resources
- Equipment and Fixed Assets
- Finance Reporting
- General Workday
- Gifts and Endowments
- Grants
- Receivables
- Service and Recharge Information
- Shared Environments and Operations
- Travel and Expense
- UW Academy Procurement
- [Show More](#)
- Showing 15 categories

Accounting

How to Perform Close, Consolidate and Reporting Process

[Home](#) > [FPB KB](#) > [Accounting](#) > [Workday Guidance](#) > [Financial Close and Consolidation](#)

This document provides information on how to perform the close, consolidate, and financial reporting process. For more information, click the link [How to Perform Close, Consolidate and](#)

Last updated: 15d ago | 473 Views

How to Perform Intercompany Accounting

[Home](#) > [FPB KB](#) > [Accounting](#) > [Workday Guidance](#) > [Workday Finance Fundamentals](#)

Purpose The purpose of this Quick Reference Guide (QRG) is to describe the Intercompany Accounting process. Audience Accountant Business Asset Accountant Project Accountant Shared

Last updated: 15d ago | 268 Views

FDM Bootcamp Series 1.1 - Accounting Worktag Overview

[Home](#) > [FPB KB](#) > [Accounting](#) > [FDM Bootcamp Series](#) > [Series 1](#)

Welcome to the FDM Boot Camp Series 1. The goal of this series is to: To strengthen SE accounting knowledge, based on UW needs and Workday setups. To build accounting knowledge in support of

Last updated: 15d ago | 151 Views

FDM Bootcamp Series 2.4 - Behind the Scenes with Journal Sources

[Home](#) > [FPB KB](#) > [Accounting](#) > [FDM Bootcamp Series](#) > [Series 2](#)

Welcome to the FDM Boot Camp Series 2 The goal of this series is to: To strengthen SE accounting knowledge, based on UW needs and Workday setups. To build accounting knowledge in support of

Last updated: 15d ago | 6 Views

UW Financial Accounting and FDM Resources

[Home](#) > [FPB KB](#) > [Accounting](#) > [FDM Concepts](#)

Scope of Activities (what you will learn): Access the various resources available to aid the FDM process Audience Impacted by this training: All users who have a need to view and understand key

Last updated: 15d ago | 67 Views

FDM Bootcamp Series 1.2 - UW Accounting Principles

[Home](#) > [FPB KB](#) > [Accounting](#) > [FDM Bootcamp Series](#) > [Series 1](#)

Welcome to the FDM Boot Camp Series 1. The goal of this series is to: To strengthen SE accounting knowledge, based on UW needs and Workday setups. To build accounting knowledge in support of

The category filters highlight the category you are currently in.

You can click on any category to show you the knowledge articles in that category.

Clicking on the plus sign will show you any subcategories. Clicking on those subcategories will take you to the knowledge articles in that subcategory.

The breadcrumbs below the knowledge article title show you where the article lives.

You can see the last time the knowledge article was updated and how many views it has received here.

UW Connect Finance Portal Search Results

This breadcrumb navigation shows you where the knowledge article lives.

You can click these to see what is in the up-level categories.

You can see when the knowledge article was last updated and how many views it has received here.

The Helpful article? feature allows you to provide simple feedback on whether the article was helpful.

This feature will be enhanced later this year.

[Home](#) / [Knowledge](#) / [Content Creator Resources](#) / [Knowledge Article Management](#) / [Creating Knowledge Articles](#)

Creating Knowledge Articles

📅 16d ago 👁 27 Views

This guide provides a comprehensive, step-by-step guide for users to navigate, create, and publish knowledge articles effectively. This guide ensures that users can systematically follow the necessary procedures, from accessing the Knowledge Base Home Page to filling in article details, adding attachments, and setting author and access controls, ultimately facilitating the creation of well-structured and accessible knowledge articles within the UWCF system.

Scope of Activities (what you will learn):

- Navigate to UWCF Classic View
- Create a Knowledge Article
- Add Attachments
- Publish a Knowledge Article

Audience Impacted by this training:

- Content Creators

Workday Security Roles Required:

- No specific security roles required

Links to Content:

Click on the linked document in the Attachment pane in the upper right of this window.

Helpful article?

Attachments

 [Creating Knowledge Articles.pdf](#)

The Attachments block shows you any attachments associated with the knowledge article.

Clicking on these attachments will open them in a new window.

Clicking on the Copy Permalink will copy the link to the knowledge article to your clipboard.

This is the link you should use to share articles with your coworkers and teammates

[Copy Permalink](#)

UW Connect Finance Portal Request Forms

Explore Request Forms

We removed a redundant search bar and made this one more visible.

Typing in the search bar will automatically filter the forms to show you what you are searching for quickly.

Search for Request Forms:

Filter By Audience: Filter By Category:

Name	Short Description	Description	Audience	Category
Accept a One Time Payment	Accept a One Time Payment	<p>Requester Any UW employee in the UW Academy or UW Medicine whose department does not already have an existing Merchant Account (MID) and has an urgent need to accept a payment that cannot be handled through the Workday Invoice process.</p> <p>Purpose The One-Time Payment Program is designed for those University entities who have an urgent need to take a one-time credit card or ACH (e-check) payment (this is NOT INTENDED for a Workday Invoice).</p> <p>The fee for this one-time payment is 20% of the transaction volume. This covers all associated interchange and merchant fees and the UW Institutional Overhead fee. If a chargeback occurs, your cost center will be responsible for any fees associated with the chargeback including lost revenue.</p> <p>DO NOT USE THIS FORM TO SUBMIT A WORKDAY INVOICE REQUEST.</p> <ul style="list-style-type: none">To submit a Workday Invoice, complete this form instead. <p>Additional information may be found on the Merchant Services website.</p>	UW Academy UW Medicine	Merchant Services