

RECOMMENDED PEOPLESFT TRAININGS (BY ROLE)

RECOMMENDED ROLE	GENERAL LEDGER BASED TRAINING (recommended)
Admin. Support Staff / Administrators	Cost Center Process, Annual Monthly Financial Reconciliation, Reconciliation Reports, IDT/COR, AR/BI (if applicable)
Financial Managers / Administrators	Reconciliation Reports, IDT/COR, AR/BI (if applicable)
CC/Project Reconcilers	SAHARA for RECONCILERS, Annual Monthly Financial Reconciliation, IDT/COR, Reconciliation Reports, AR/BI (if applicable)
CC/Project Managers	SAHARA for MANAGERS, Annual Monthly Financial Reconciliation Video for MGRs

TRAINING	Session Name	Description
AR/BI	Accounts Receivable / Billing	To create bills and generate invoices to outside entities for payment of services provided by the UTRGV based Department. This training process is for COST CENTERS ONLY
Cost Center Process	Cost Center Process	To create or modify existing Cost Centers (such as modifying team members or description. This training is for COST CENTERS ONLY
IDT/COR	Interdepartmental Transfers/Corrections	Initiating Interdepartmental Transfers and Corrections with focus on Cost Centers also included Grant Project, Plant Project & Restricted Cost Centers
Monthly Financial Recon Video for Managers	Monthly Financial Reconciliation Video for Managers	Annual based Training for Cost Center and/or Project Managers on their role as CC/Project Managers
Monthly Financial Reconciliation	Monthly Financial Reconciliation Process	Annual based Training for Cost Center and/or Project Reconcilers emphasizing the Reconciliation Process, Reports available, and a Demonstration of the Reconciliation itself.
Reconciliation Reports	Monthly Financial Reconciliation Reports	Accessing, Navigating, Configuring, and Using the various Reports in Production and Reporting Environments to assist in Monthly Reconciliation
SAHARA for MANAGERS	SAHARA for MANAGERS	Navigating and Using the SAHARA application MANAGER access with emphasis on Monthly Approval & Annual Certification
SAHARA for RECONCILERS	SAHARA for RECONCILERS	Navigating and Using the SAHARA application with RECONCILER access with emphasis on Monthly Reconciliation
SAHARA Inquiry	SAHARA Inquiry	Navigating and Using the SAHARA application for those with INQUIRY ONLY access