

| Financial Training Course FTD Calendar To Register for Training http://knowledgelink.upenn.edu/ Tip: Search using one keyword * Web-based + Instructor-Led | Required Training Prerequisites | | | | Access Form | Responsible Training Department # On FTD's Website |
|---|---------------------------------|--------------------------------|-----------------------------|--------------------------------|---|--|
| | ...Business at Penn Overview | ...Chart of Accounts: Segments | ...Using the COA within RCM | ...Other | | |
| Business at Penn Overview * | | | | | | Financial Training Dept. # |
| Chart of Accounts: Segments * | | | | | | Financial Training Dept. # |
| BEN Financials | | | | | | |
| <i>BEN Balances – General Ledger</i> | | | | | | |
| Using the Chart of Accounts within Responsibility Center Management (RCM) + | X | X | | | | Financial Training Dept. # |
| General Ledger Inquiry/Reporting + | X | X | X | | BEN Financials eForm | Financial Training Dept. # |
| Manual Journal Entry (MJE) + | X | X | X | GL Inq/Rep MJE Interfund KB | BEN Financials eForm | Financial Training Dept. # |
| MJE Interfund Knowledge Building * | | | | | BEN Financials eForm | Financial Training Dept. # |
| Grant & Contract (G & C) Cost Transfers for Expense * | X | X | X | MJE | BEN Financials eForm | Financial Training Dept. # |
| Budget Journal Entry (BJE) + | X | X | X | MJE | BEN Financials eForm | Financial Training Dept. # |
| Freeze Grant + | X | X | X | GL Inq/Rep | BEN Financials eForm | Financial Training Dept. # |
| <i>BEN Buys - Purchasing</i> | | | | | | |
| Requisitioner + | | | | | BEN Financials eForm | Financial Training Dept. # |
| Invoice Inquiry * | | | | | BEN Financials eForm | Financial Training Dept. # |
| Purchase Order Manager + | X | X | | | BEN Financials eForm | Financial Training Dept. # |
| <i>Penn Marketplace Non-PO Payment Request</i> | | | | | | |
| Knowledge Building * | | | | | | Financial Training Dept. # |
| Application Training for Preparers * | | | | Non-PO Pay Req KB | BEN Financials eForm | Financial Training Dept. # |
| Application Training for Approvers * | | | | KB & App for Prep | BEN Financials eForm | Financial Training Dept. # |
| <i>BEN Assets</i> | | | | | | |
| BEN Assets Knowledge Building * | | | | | | Financial Training Dept. # |
| BEN Assets Application Training + | | | | BEN Assets KB | BEN Financials eForm | Financial Training Dept. # |
| Purchasing Services Card Programs | | | | | | |
| Purchasing Card Knowledge Building * | | | | | Comptroller's Office Document/Forms | Financial Training Dept. # 2/3 year requirement |

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| Student Program Card Training * | | | | | Student Program Card Application | Financial Training Dept. # |
| University Meeting Card * | | | | | University Meeting Card Application | Financial Training Dept. # |
| Other Financial Training | | | | | | |
| Account Reconciliation Knowledge Building* | | | | | | Financial Training Dept. # |
| Operating Gifts & Endowments Knowledge Building* | | | | | | Financial Training Dept. # |
| Hyperion Planning for End Users Penn-Tutorial * | | | | | Planning Access Request Form | Budget and Management Analysis |
| Payroll Reallocations | | | | | | |
| Payroll Reallocations – Knowledge Building * | X | X | | | | Financial Training Dept. # |
| Payroll Reallocations – Application Training * | | | | Payroll Reallocations KB | Payroll Reallocations Access Form | Financial Training Dept. # |
| Student Registration and Financial Services (SRFS) | | | | | | |
| Family Education Rights and Privacy Act FERPA Overview – SRFS* | | | | | | Penn Audit, Compliance and Privacy |
| PENNANT Training (Various) * | | | | | Pennant Accounts - User Access Form | Student Registration and Financial Services |
| Sponsored Projects Compliance | | | | | | |
| Sponsored Projects at Penn (SP@P) – A 6 part program * | | | | | | Office of Research Services (ORS) |
| PennERA – Proposal Development Knowledge Building (KB) for Administrators * | | | | | | Office of Research Services (ORS) |
| PennERA – Proposal Development System Training – Basic + | | | | PennERA – KB for Admin | Proposal Development Access Request Form | Office of Research Services (ORS) |
| PennERA – Proposal Development System Training – Advanced (Budgeting) + | | | | PennERA – KB for Admin & System Training- Basic | Proposal Development Access Request Form | Office of Research Services (ORS) |

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| PennTEM Travel & Expense Management | | | | | | |
| Concur Expense Report Approver Knowledge Building (KB) * | | | | | See Senior BA | Financial Training Dept. |
| Concur Expense Report Approver Application Training * | | | | Concur Expense Report Approver KB | See Senior BA | Financial Training Dept. |
| BEN Web ADI for TEM Maintenance * | | | | | See Senior BA | Financial Training Dept. |
| Office of the Treasurer | | | | | | |
| Payment Card Industry – Data Security Standards Workforce Education * | | | | | | Financial Training Dept. Annual requirement |
| BEN Deposits Knowledge Building (KB) * | | | | | | Financial Training Dept. # |
| BEN Deposits Application Training * | | | | BEN Deposits KB | Comptroller's Office Document/Forms | Financial Training Dept. # |
| Other Training | | | | | | |
| Data Warehouse – GL Collection – to register for 'Business Objects...' training, go to: https://www.isc.upenn.edu/data-warehouse-training+ | X | X | X | | Data Warehouse eForm | Enterprise Information & Analytics Part of ISC |
| Mission Continuity Knowledge Building * | | | | Information Privacy and Security at Penn | | Financial Training Dept. |
| Mission Continuity Program: Shadow Planner Application * | | | | Mission Continuity KB | Shadow-Planner Access Request Form | Financial Training Dept. |
| Space at Penn Knowledge Building (KB) * | | | | | | Financial Training Dept. # |
| Space at Penn Application Training * | | | | Space at Penn KB | 1) Space@Penn Web Updater 2) Data: Space@Penn | Financial Training Dept. # |
| Fundamentals of Driver Safety Curriculum Car (7 Modules); Van (9 Modules) * | | | | | | Office of Risk Management and Insurance # 3 year requirement |