

Financial Training Course To Register for Training Workday Learning <i>Tip: Search using one keyword</i> <i>* Web-based Training</i> <i>+ Instructor-Led Hands-on</i>	Required Training Prerequisites				Access Request Form	Required Training Dept # 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 Balances Access Request	Financial Training Dept. #
Manual Journal Entry (MJE) +	X	X	X	GL Inq/Rep	BEN Balances Access Request	Financial Training Dept. #
MJE Interfund Knowledge Building *	X	X	X	MJE	BEN Balances Access Request	Financial Training Dept. #
Grant & Contract (G&C) Cost Transfers for Expense *	X	X	X	MJE	BEN Balances Access Request	Financial Training Dept. #
Budget Journal Entry (BJE) +	X	X	X	MJE	BEN Balances Access Request	Financial Training Dept. #
Freeze Grant +	X	X	X	GL Inq/Rep	BEN Balances Access Request	Financial Training Dept. #
<i>BEN Buys - Purchasing</i>						
Requisitioner +					BEN Buys Access Request	Financial Training Dept. #
Invoice Inquiry *					BEN Buys Access Request	Financial Training Dept. #
Purchase Order Manager +	X	X			BEN Buys Access Request	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 Assets Access Request	Financial Training Dept. #

Last Updated 07/31/2024

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Purchasing Services Card Programs						
Purchasing Card Knowledge Building *					Card Program Forms	Financial Training Dept. # 2 year re-training requirement
Student Program Card Training *					Card Program Forms	Financial Training Dept. #
University Meeting Card Training *					Card Program Forms	Financial Training Dept. #
Other Financial Administration Training						
Account Reconciliation Knowledge Building*						Financial Training Dept. #
Operating Gifts & Endowments Knowledge Building*						Financial Training Dept. #
Hyperion Planning					Planning Access Request Form	Budget Planning & 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 Access Requests	Student Registration and Financial Services
Sponsored Projects Compliance						
Sponsored Projects at Penn (SP@P) Training						Office of Research Services (ORS)

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PennERA (Electronic Research Admin) Training (various)				PennERA – KB for Admin & System Training- Basic	PennERA Access Forms	Office of Research Services (ORS)
PennERS (Effort Reporting System) Training				PennERA – KB for Admin	PennERS Access Form	Office of Research Services (ORS)
PennTEM Travel & Expense Management						
Concur Expense Report Approver Knowledge Building (KB) *					See Senior BA	Penn Travel
Concur Expense Report Approver Application Training *				Concur Expense Report Approver KB	See Senior BA	Penn Travel
BEN Web ADI for TEM Maintenance *					See Senior BA	Financial Training Dept.
Travel Smart						Penn Global – Travel Smart
Office of the Treasurer						
Payment Card Industry – Data Security Standards Workforce Education *						Finance & Treasury Annual re-training requirement
Principles of Proper Cash Handling *						Financial Training Dept. #
BEN Deposits Application Training *				Principles of Proper Cash Handling	BEN Deposits Access Form	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 (ISC)

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	Business at Penn Overview	Chart of Accounts: Segments	Using the COA within RCM	...Other		
Fundamentals of Driver Safety * (multi module)						Office of Risk Management and Insurance # 3 year re-training requirement
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. #