

## WebLearning PeopleSoft & JD Edwards Enterprise Curriculum



### PeopleSoft Enterprise Basics

The **PeopleSoft Enterprise Basics** module describes some general features that are universal to all PeopleSoft Enterprise applications.

Upon completion of this module, you will be able to:

- Describe the PeopleSoft Enterprise Internet Architecture.
- Describe the features of PeopleSoft Enterprise Workflow.
- Describe the features of PeopleSoft Enterprise Business Units and SetIDs.

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- PeopleSoft Internet Architecture
- Introduction to PeopleSoft Internet Architecture
- Benefits of Browser-Based Application Deployment
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- Application Server
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- Introduction to Workflow
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- Workflow Components
- Defining Workflow Rules
- Defining Workflow Roles
- Defining Workflow Routings
- Defining Online Processing
- Introduction to Business Units and SetIDs
- Defining Transaction Tables and Control Tables
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- Business Unit Functions and Benefits
- Business Units and PeopleSoft Applications
- Organizing Your Data into Business Units
- Defining SetIDs
- Benefits of Using Record Groups
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Benefits of TableSet Record Group Controls

# Enterprise Student Administration 8.9 Fundamentals

## Introduction

Welcome to the world of PeopleSoft! This course covers basic concepts, terminology, and navigation techniques for PeopleSoft Enterprise Student Administration 8.9 applications using a browser-based interface to view or manipulate data. The examples in this module use the Enterprise Student Administration 8.9 product and scenarios that are based in the United States.

Upon completion of this module, you will be able to:

- Describe basic navigation elements used in PeopleSoft applications.
- Navigate to and within component pages.
- Describe key fields.
- Use search pages.
- Work with pages.
- Add and update data.
- Describe PeopleSoft workflow

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Adding and Updating Data
Recognizing Action Types
Categories of Effective-Dated Rows
Adding a New High-Level Key
Using Update/Display
Using Include History
Using Correct History
Using PeopleSoft Workflow

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Sending and Receiving Notifications  
Using Worklists and Glossary

# Enterprise HCM 8.9 Fundamentals

## Introduction

Welcome to the world of PeopleSoft! This course covers basic concepts, terminology, and navigation techniques for PeopleSoft Enterprise HCM 8.9 applications using a browser-based interface to view or manipulate data. The examples in this module use the Enterprise Human Capital Management 8.9 product and scenarios that are based in the United States.

Upon completion of this module, you will be able to:

- Describe basic navigation elements used in PeopleSoft applications.
- Navigate to and within component pages.
- Describe key fields.
- Use search pages.
- Work with pages.
- Add and update data.
- Describe PeopleSoft workflow

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## PeopleSoft Enterprise Payables 8.9

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- Closing Voucher Contracts
- Running the Voucher Build Process
- Processing Payments
- Selecting Vouchers for Payment
- Creating Manual Payments
- Processing Escheated Payments

## WebLearning Education Services

Running the Pay Cycle  
Using Express Checks  
Canceling a Payment  
Processing Rescheduled Payments  
Creating Drafts  
Batch Processing  
Running the Matching Process  
Running the Journal Generator  
Posting Payments  
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Running Reports  
Running Financials and SCM Reports  
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## Enterprise Planning and Budgeting 8.9

### Introduction

A budget is at the foundation of your organisation's operations. Each organisation goes through deliberations that result in an approved budget. In a typical organization, budgeting is also an iterative process expenses and revenue estimates are re-evaluated, start and end date are changed, and objectives are modified. PeopleSoft Planning and Budgeting accommodates these changes so that you can modify your budget plan and update your database tables.

By the end of this course, you will be able to:

- Define planning and budgeting
- Explain the budgeting integrations at a high level.
- Design a planning model.
- Use flexible formulas.
- Update a planning model.
- Use the planning workspace.
- Use line item activities.
- Use mass adjustments and allocations.
- Use position budgeting.
- Use asset budgeting.
- Use budget analysis and reporting.

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Staging a Flexible Formula  
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Updating Driver Parameters  
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Locking Planning and Budgeting Activities  
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Sending Email to Planning and Budgeting Users  
Attaching Documentation and Guidelines  
Submitting Plans and Budgets  
Rejecting Plans and Budgets  
Approving Plans and Budgets  
Using Line Item Activities  
Understanding Line Item Budgeting  
Entering a Line Item Amount Using Methods  
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Adjusting Line Items  
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Applying Allocations  
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Understanding Position Budgeting  
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Understanding Asset Budgeting  
Working with In-Service Assets  
Adding an Asset  
Editing an Asset  
Using Budget Analysis and Reporting  
Performing Asset Analysis  
Performing Position Budgeting Analysis  
Generating Budget Reports

## Enterprise Asset Management 8.8

PeopleSoft Asset Management was designed to help you maintain physical control over your organization's assets, perform complex financial and tax accounting, enable you to plan for your future asset needs, calculate and maintain lease information, and provide central repository for complex asset information. By incorporating these functions into a single database, PeopleSoft Asset Management can reduce the associated maintenance, reconciliation, and data integrity problems.

Upon completion of this module, you will be able to:

- Add and maintain assets.
- Adjust and transfer assets.
- Perform physical inventory.
- Understand composite asset processing.
- Work with leased assets.
- Work with asset budgeting.
- Retire assets.
- Archive asset information.
- Process depreciation.
- Use user-defined depreciation.
- Calculate depreciation.
- Create accounting entries.
- Integrate with other applications.
- Use group asset processing.
- Change assets in mass.
- Track repairs and service
- Work with joint venture processing
- Run reports

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Processing Physical Inventory  
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Understanding Composite Asset Processing  
Capitalizing Composite Members into Composite Assets  
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Loading Composite Asset Transactions  
Performing Transactions on Composite Assets  
Working with Leased Assets  
Adding Capital Lease Assets  
Adding Operating Lease Assets  
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Creating a Capital Acquisition Plan  
Linking Assets to a Capital Acquisition Plan  
Adjusting a Capital Acquisition Plan  
Retiring Assets  
Retiring Financial Assets  
Retiring Non-Financial Assets  
Retiring Assets Automatically  
Reinstating Assets  
Archiving Asset Information  
Archiving Inactive Assets  
Viewing Archived Data  
Restoring Archived Data  
Processing Depreciation  
Processing Depreciation Calculations  
Viewing Depreciation  
Adjusting Accumulated Depreciation  
Expanding Depreciation by Period  
Creating Pending Depreciation Transactions  
Reviewing Depreciation Processing  
Using User-Defined Depreciation  
Understanding User-Defined Depreciation  
Understanding the Steps to Create a User-Defined Method  
Generating a User-Defined Depreciation SQC Program  
Copying a User-Defined Depreciation Method  
Calculating Depreciation  
Understanding Depreciation Calculations  
Understanding the Depreciation Calculation Process  
Understanding Formula-Based Depreciation Methods  
Creating Accounting Entries  
Understanding Steps to Create Accounting Entries  
Running Accounting Entry Creation  
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Closing an Accounting Period  
Integrating with Other Applications  
Understanding Data Previewing in the Loader Tables

Understanding the Process to Approve Load Lines  
Understanding the Transaction Loader Process  
Understanding Consolidating and Unitizing Assets  
Consolidating Assets  
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Running Retroactive Depreciation Close Process  
Reviewing Asset Book History  
Changing Assets in Mass  
Defining a Mass Change  
Running the Mass Change Process  
Tracking Repairs and Service  
Adding Asset Service and Repair Details  
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Tracking Maintenance Contracts  
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Understanding Joint Venture Processing  
Understanding Adding and Maintaining Joint Venture Assets  
Understanding Steps to Change Ownership Allocations  
Running Reports  
Running Financials and SCM Reports  
Glossary

## PeopleSoft EPM 8.9: CD

Target Audience: Functional & Technical project team members

Applicable Release: 8.9 customers

Cost: 16 training units

This suite of courses provides overview training for EPM 8.9 CRM and Financial Analytics. In addition to a high level overview of Enterprise Performance Management, users will gain a better understanding of Ascential's DataStage, the Business Analysis Modeller (BAM) and Building Insight DataMarts.

## EPM 8.9: Ascential's DataStage for EPM (ETL)

This seminar is an overview of the data acquisition process in EPM 8.9.

Course objectives:

- Recognize the architecture changes to the Enterprise Warehouse
- Identify the new data loading process
- Identify incremental loading
- Identify the error processing changes
- Describe how to schedule ETL jobs in the Enterprise Warehouse
- List the new features in the DataStage 5.1 tool

EPM 8.9: Enterprise Warehouse Overview (EW)

Course objectives:

- Identify the data layers within the PeopleSoft Enterprise Warehouse
- Identify the tools used for data transformation, enrichment and reporting
- List the advantages of the Operational Data Store (ODS)
- List the primary uses of the Data Warehouse
- Identify the differences between ODS data quality and Data Warehouse data quality
- List the advantages of the Data Marts

## EPM 8.9: Building Insight Data Marts Overview

This presentation covers the changes to building Data Marts in EPM 8.9. We will cover the history of the Data Mart building process and where it is today.

- Identify the evaluation
- Insight Analytics
- Identify how Data Marts are built
- Identify the Dimension processing
- Identify Fact Processing components
- Understand the delivered insights
- Recognize features of Data Mart security

## **EPM 8.9: CRM Analytics Overview**

Learn how PeopleSoft CRM Analytics enables you to better understand customer behaviour, anticipate customer needs and influence their decisions.

Course objectives:

- Recognize the competitive advantage of PeopleSoft CRM Analytics suite
- List the products that make up PeopleSoft CRM Analytics suite
- Identify features of the CRM Warehouse, Customer Behavioural Modelling, and Customer Scorecard
- Recognize how all the products within the CRM Analytics suite work together

## PeopleSoft Supply Chain Management 8.8

Learn about the new features and functionality in PeopleSoft Supply Chain Management 8.8! These courses are designed to provide an overview of changes by product from release 8.4 to 8.8. It also contains product overviews for new functionality in 8.8 including Program Management and Enterprise Pricing.

Great for customers who are trying to determine the value in upgrading or for customers who need to provide training to their business specialists!

**Target Audience:** Executive sponsors, key decision makers, project managers, project team members and business specialists

**Applicable Release:** 8.8 and 8.9 SCM customers

**Cost:** 25 training units

## e-Procurement 8.8

This course will explain the benefits of deploying PeopleSoft eProcurement to make your procurement process more efficient as well as describe the new features and enhancements in eProcurement 8.8. Topics include:

- Supplier Relationship Management and eProcurement
- Benefits of eProcurement 8.8
- Usability of eProcurement 8.8
- Workflow Approval
- Catalogues
- Integration
- Other Enhancements in e-Procurement 8.8

## Billing 8.8

This course provides an overview of the changes in Billing and eBill Payment release 8.8. Topics include:

- Reprinting invoices
- Extended Integration in Billing 8.8
- Generic Credit Card Interface Improved Navigation in eBill Payment 8.8 eBill Payment User Preference Enhancements

## **Engineering and Manufacturing 8.8**

### **PeopleSoft Manufacturing 8.8.**

Topics include:

- Improved Navigation
- Engineering - Design to Deploy Business Process
- Agile Product Data Management
- Manufacturing - Plan to Product Business Process
- Serial Genealogy
- Yield by Operation
- Actual Costs for Manufacturing Items
- MES Integration

## **Supply Planning 8.8**

This course provides an overview of the changes in Supply Planning from release 8.4 to 8.8.

Topics include:

- Real world Supply Chain challenges
- Understanding and positioning Supply Planning
- Architecture and process flow
- Key new features
- Upgrade path
- Success factors in implementing Supply Planning

## **Order Management 8.8**

This course provides an overview of the changes in Order Management release 8.8.

Topics include:

- Overview of PeopleSoft's Order to Cash solution
- Express order entry
- Enhanced order tracking
- Contracts integration
- Miscellaneous Order Management enhancements

## **Inventory 8.8**

This course provides an overview PeopleSoft Inventory release 8.8/8.9.

By the end of this course you will be able to:

- Gain a high-level understanding of PeopleSoft's Order to Cash Process
- Understand the key differences in Inventory 8.8 including improved usability, mobile functionality and general enhancements

Recognize the benefits of upgrading to Inventory 8.8

## **Purchasing 8.8**

This course provides an overview of the changes in PeopleSoft Purchasing 8.8. It also provides a high level overview of the Supplier Relationship Management product line.

Usability and Interface

RFQ required rules Design CD

Sourcing enhancements PeopleSoft 8: FDM Security CD

Streamlined change orders PeopleSoft 8: HRMS Security CD

Vendor contract improvements PeopleSoft 8.4: Financials and Supply

Procurement card improvements Chain Management Security CD

Integration with 3rd party tax applications PeopleSoft 8.4: PeopleTools

Global features

## **PeopleSoft EPM 8.8 and 8.9: Budgeting and Business Planning CD**

Our CDs are bundled sets of courses designed to train your entire project team or user community. These CDs can be purchased with training units and are designed to run locally from your users' hard drive or from a network server. They are intended as an enterprise-wide solution for training large group of users. Purchase an On Demand CD and take advantage of unlimited use of the courses in your organization, no expiration of access to the courses, and price savings if you have more than 8 users who need to take these courses.

Target Audience: Functional & Technical project team members

Applicable Release: 8.8/8.9

Customers Cost: 25 training units

This suite of courses provides overview training for EPM 8.8 Budgeting and Business Planning. In addition to a high level overview of Enterprise Performance Management ,users will gain a better understanding of Ascential's DataStage, the Business Analysis Modeller (BAM) and Building Insight DataMarts.

## **EPM 8.8: Ascential Datastage for EPM (ETL) (Courseware)**

This Courseware is an overview of the data acquisition process in EPM 8.8. Course objectives:

- Recognize the architecture changes to the Enterprise Warehouse
- Identify the new data loading process
- Identify Incremental loading
- Identify the error processing changes
- Describe how to schedule ETL jobs in the Enterprise Warehouse
- List the new features in the Ascential Datastage tool.

## **EPM 8.8: Enterprise Warehouse Overview (EW) (Courseware)**

- Identify the data layers within the PeopleSoft Enterprise Warehouse
- Identify the tools used for data transformation, enrichment and reporting
- List the advantages of the Operational Data Store (ODS)
- List the primary uses of the Data Warehouse
- Identify the differences between ODS data quality and Data Warehouse data quality
- List the advantages of the Data Marts

## **EPM 8.8: Building Insight Data Marts Overview (Courseware)**

This presentation covers the changes to building Data Marts in EPM 8.8. We will cover the history of the Data Mart building process and where it is today.

- Identify the evaluation Insight Analytics
- Identify how Data Marts are built
- Identify the dimension processing
- Identify fact processing components
- Understand the delivered insights
- Recognize features of Data Mart security

## **Business Analysis Modeller for EPM 8.8 (Courseware)**

EPM 8.8 BAM Model Designer Overview Courseware OnDemand covers the functionality of the Business Analysis Modeler (BAM) Model Designer. The Model Designer is used to build models of information.

## **EPM 8.8: BAM Multi-User (Courseware)**

EPM 8.8: BAM Multi-User is an overview course that describes and demonstrates the multi-user features of BAM.

- Understand the BAM multi-user architecture
- Describe BAM roles
- Explain how a data model is published
- Define BAM user access
- Explain data checkout with BAM models

### **Other EPM CDs that are available include:**

PeopleSoft EPM 8.8: Budgeting and Business Planning CD

PeopleSoft EPM 8.8: CRM Analytics CD

PeopleSoft EPM 8.8: Financial Analytics

CD PeopleSoft EPM 8.8: Workforce Analytics CD

PeopleSoft 8.8: EPM 8.8 to 8.9 Delta CD

This Courseware is an overview of PeopleSoft's EPM 8.8 Business Planning. It provides a high level overview of the products features and benefits along with a detailed demonstration. Course objectives:

Recognise the planning issues companies deal with when trying to manage and drive their business

Identify the uses of PeopleSoft Business Planning

Recognize the general flow of information through PeopleSoft Business Planning

List some of the key features of Business Planning

Identify how Budgeting completes the PeopleSoft Business Planning solution

## **PeopleSoft Budgeting 8.8 Features & Functions (Courseware)**

This Courseware provides an overview of PeopleSoft Budgeting 8.8 Features & Functions. By the end of this Courseware participants will be able to:

Understand the basic architecture and features of Budgeting 8.8

Understand integration Points and processes for Budgeting 8.8

Prepare Position, Asset and Line Item Budgeting