

STAFF DEVELOPMENT COMPONENT INFORMATION

COMPONENT TITLE: Integrated Business Information System (IBIS) Financial Applications

IDENTIFIER NUMBER: 3201004

MAXIMUM POINTS: 60

DESCRIPTION:

This component is designed to enable the participant to use selected PeopleSoft/Oracle application software successfully within the following systems: Procurement, Financial, Query, and Reporting Systems

***Prerequisite:** Experience using an internet web browser*

GENERAL OBJECTIVE:

To instruct participants in the use of:

- Procurement Systems
- Financial Systems
- Query and Reporting of Financial Systems

SPECIFIC OBJECTIVES:

Upon completion, the participants will learn the skills to be able to:

A. Procurement Systems (14 points)

1. Navigate within the PeopleSoft procurement application (1)
2. Create/Edit Purchasing Requisitions (3)
3. Order items through the MarketPlace (2)
4. Receive Items from Purchase Order (2)
5. Process Vouchers and create payments to vendors for goods and services (2)
6. Manage Warehouse Inventory System (3)
7. Describe the business process flow and basic functionality of the PeopleSoft Procurement System (1)

B. Financial Systems (32 points)

1. Navigate within the PeopleSoft application to operate the financial systems. (1)
2. Perform general accounting/bookkeeping activities (3)
3. Manage assets for a department and/or department (2)
4. Create bills and process receivables (2)
5. Create and manage budgets (2)
6. Create and manage capital projects (2)
7. Manage Assets (2)
8. Perform Inventory management (1)
9. Maintain Accounts Receivable/Billing (2)
10. Create and Maintain Chart of Accounts (2)

11. Manage and perform Budget Transfers (2)
12. Create and maintain journal entries (2)
13. Maintain the General Ledger (2)
14. Enter and manage travel & expenses (2)
15. Perform strategic sourcing activities (2)
16. Perform other PeopleSoft/Oracle related e-applications (3)

C. Query and Reporting of Financial Systems (12 points)

1. View and run queries related to the financial systems (1)
2. Create and edit queries related to the financial systems (2)
3. Create joins from multiple tables related to the financial systems (1)
4. Specify Criteria and create run-time prompts related to the financial systems (1)
5. Output query results to Excel and other applications (1)
6. Create and format a Crystal report related to the financial systems (3)
7. Develop, build and process PS/nVision Reports (3)

PROCEDURES:

Participants will experience lecture, demonstration, hands-on, and mastery of activities concerning the selected application(s) program(s).

FOLLOW-UP PROCEDURES:

Participants will:

1. Communicate regularly via email with other users for ongoing technology support.
2. Demonstrate implementation of technology skills as verified through direct observation, product, portfolio, participant log, and/or collegial sharing.

EVALUATION:

Participants will:

1. Produce a printed copy of the above mentioned computer application(s) package(s) as assigned by the instructor.
2. Demonstrate mastery of the above mentioned computer application(s) package(s) as assigned by the instructor for review by application department.
3. Demonstrate mastery of the above mentioned computer application(s) package(s) in the Used Productivity Kit (UPK) "Do it" module.
4. Principal or Principal designee will confirm that person trained has performed the activities in actual job duties.

COMPONENT EVALUATION:

Participants and instructors will assess the degree to which the procedures address the specific objectives and will make recommendations for revision through a questionnaire/survey.