

# Oracle Administrative Systems Course Catalog

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This catalog contains a comprehensive listing of computer skills courses offered by Organizational Learning & Development. For a list of our currently offered classes please consult our class schedule located at [www.uab.edu/learn](http://www.uab.edu/learn).

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# Oracle Administrative Systems

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## ACT Document Reasons-When, Why & Which to Use

**Target Audience:** Individuals responsible for processing and approving ACT Documents

**Requirements:** UAB HR Officer Responsibility

Description: Provides a detailed explanation of the ACT Document Reasons currently available for Faculty and Staff Employees. Topics include a detailed definition of each ACT Document Reason available, and the appropriate use of each document reason; how to use the WAM form to locate the Workflow approval path for a specific document type. Also covered is the Central Administration approval path for each document type, and understanding payroll deadlines as they pertain to ACT Documents.

**Course hours:** 2.5 hours

**Class Size:** 15

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## Approving or Certifying Effort Reports

**Target Audience:** Individuals who have effort reports to certify or approve.

**Requirements:** UAB Effort Report User responsibility

Description: Discusses the process of approving or certifying effort reports, including access to the document through the personal work list and the information available using the "View Previous Efforts Reports" menu option.

**Course hours:** 0.5 hours

**Class Size:** 15

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## Effort Reporting: From New to Certified

**Target Audience:** Employees responsible for tracking effort reports through to certification and persons charged with verifying the accuracy of the quarterly effort report and CSSR data.

**Requirements:** UAB HR Officer or UAB Salary Reclass responsibilities

Description: The topics covered include managing labor distribution (LD) using burst reports, system tools and system forms. Other topics covered are the effort report workflow, effort report document statuses, notification action buttons, document locator, view effort report extract, salary reclass form, and viewing salary distributions by period and document.

**Course hours:** 3 hours

**Class Size:** 15

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## Essentials for Creating and Submitting Payment Requests

**Target Audience:** New users or users with limited experience creating payment requests

**Requirements:** UAB FN Document Entry/Approval or UAB Requisition Input responsibility

Description: Covers the processes used to create Payment Requests. Topics include creating, & editing payment requests, using Supplier Inquiry and the Personal Work list, creating payment requests for special cases (i.e., patient/subject payments), and creating supporting documentation.

**Course hours:** 2.5 hours

**Class Size:** 15

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## Essentials for Creating and Submitting Requisitions

**Target Audience:** New users or users with limited experience creating requisitions

**Requirements:** UAB FN Document Entry/Approval or UAB Requisition Input responsibility

Description: Covers the processes used to create Purchase Order Requisitions. Topics include creating, canceling, deleting & editing requisitions, using Supplier Inquiry, creating requisitions for contracted & non-contracted suppliers, using split account distributions, and adding attachments.

**Course hours:** 3 hours

**Class Size:** 15

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## GA Inquiry and Reporting

**Target Audience:** Individuals who review financial reports, and individuals who want to generate ad hoc reports

**Requirements:** UAB GA End User responsibility

Description: Explains system-delivered and ad hoc GA reports. Topics include detailed instructions for creating ad hoc reports and the Expenditure Inquiry form, setting parameters, and exporting applicable reports into Excel. Covers all reporting options available, how to create them, read and understand them, and use them to perform daily account management tasks. Also includes information on setting up secondary recipients and using Report Viewer.

**Course hours:** 3 hours

**Class Size:** 15

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## GL Journal Entries

**Target Audience:** Individuals who create, approve, and/or track GL journal entries

**Requirements:** UAB FN Document Entry/Approval responsibility

Description: Provides information necessary to enter basic journal entries (JEs), as well as JEs involving multiple accounts and internal payments. Topics include types of transactions processed on JEs and any restrictions applicable to such transactions. Covers tracking journals/batches and any supplemental documentation using queries, WebIt/Optidoc, and Document Locator. Also introduces several problem-solving options such as deleting journals/batches, changing accounting periods, handling orphaned batches, and troubleshooting.

**Course hours:** 2 hours

**Class Size:** 15

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## HR and the Oracle Administrative System

**Target Audience:** Individuals responsible for processing ACT documents; individuals responsible for approving ACT documents

**Requirements:** Must have a BlazerID and password AND either the UAB FN Document/Approval or Requisition Input responsibility.

Description: Introduces the Oracle HR Module and its integration with other related modules within the Oracle Administrative System. Topics to be covered include: a guided tour of Informative UAB Websites as they relate to the Oracle HR Module; explanation of the Oracle Organization Structure, HR Organizational Hierarchy and Security, Oracle HR Roles and Responsibilities, as well as an introduction to the Oracle HR Forms and HR Officer Menu Options.

**Course hours:** 2.5 hours

**Class Size:** 15

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## HR Reporting: Retrieving, Viewing, and Exporting HR Data

**Target Audience:** Individuals responsible for managing personnel and human resource functions.

**Requirements:** UAB HR Officer Responsibility

Description: Provides instructions and suggestions for utilizing the HR Data Views menu options as an Oracle HR Management Tool. Discuss how to use and export employee data using the Assignment List, View current and historical biweekly accruals, using the Personnel Action Log (PAL) to view an employee's personal changes, and an overview of the Faculty Data Form. Also includes information on HR Ad-Hoc Reporting and HR electronically distributed reports.

**Course hours:** 2 hours

**Class Size:** 15

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## HR Reporting: Salary, LD and Payroll Data

**Target Audience:** Individuals responsible for employee/trainee salary distributions, effort reports and payroll expenditures for an organization.

**Requirements:** UAB HR Officer Responsibility assigned in the Oracle Admin System

Description: Provides instructions and suggestions for utilizing the HR Data View menu options as a means of managing Salary, Labor Distributions and Payroll expenditures for an organization. This course includes detailed instruction on the Payroll Information Extract as an equity and labor costing management tool. Also covered are the "view" menu options and HR Ad-hoc reports available to assist with salary distribution management and effort reporting oversight.

**Course hours:** 2 hours

**Class Size:** 15

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## Introduction to Oracle Administrative Systems

**Target Audience:** New employees and users who wish to improve their Oracle navigation skills.

**Requirements:** Must have a BlazerID and password AND either the UAB FN Document/Approval or Requisition Input responsibility

Description: Covers the basic features of accessing and navigating the UAB Oracle Administrative Systems. Topics include an Introduction to the Oracle Administrative System, primary uses of the system, basic access and navigation of the system's forms and applications, the system's approval workflow process, and how to locate and track documents within the administrative system. Participants will log on using their BlazerID & password.

**Course hours:** 2 hours

**Class Size:** 15

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## Campus KRONOS Timekeeping

**Target Audience:** Individuals who process leave documents and individuals who approve leave documents.

**Requirements:** Campus Employees who have been identified as Campus KRONOS Editors

Description: Covers the basic features of accessing and navigating the Campus KRONOS system and KRONOS TEL form. Topics will include Kronos terminology, editing timecards, accessing the audit trail information, running reports and time entry in the KRONOS TEL.

**Course hours:** 2.5 hours

**Class Size:** 15

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## Leave of Absence Guidelines and Procedures

**Target Audience:** Individuals who process leave documents and individuals who approve leave documents.

**Requirements:** UAB HR Officer Responsibility

Description: Provides a detailed explanation of guidelines and policies pertaining to Leave of Absences at UAB. Topics include a review of Leave of Absences available to UAB Faculty and Staff, eligibility requirements and required documentation. Also covered are instructions for processing a Leave of Absence ACT document, how to extend a leave of absence and how to process a Return from Leave ACT document.

**Course hours:** 1 hours

**Class Size:** 15

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## Managing Accounts with Oracle

**Target Audience:** Employees whose primary responsibilities include day to day account reconciliation, account transaction research, cash management, and the periodic reporting of financial standing to departmental management.

**Requirements:** Must have the following responsibilities: UAB FN Document Entry/Approval, and GA End User or GL End User

Description: The Managing Accounts with Oracle class provides users of the Oracle Financial applications an overview of what it means to manage UAB accounts. Not meant as a step-by-step guide, it covers the basic considerations and components necessary for an effective account management system and/or process. It also provides a summary of all the tools in the Oracle finance applications that can assist with development and implementation of sound management procedures. This course is geared towards employees.

**Course hours:** 2 hours

**Class Size:** 15

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## Managing Biweekly Time and Labor Costing on the TEL Form

**Target Audience:** Employees responsible for managing time and costing instruction for biweekly employees

**Requirements:** UAB Timekeeper or UAB HR Officer Responsibility

Description: Hands-on approach to entering data on the Time Entry and Labor (TEL) document, managing work and benefit categorization, and using the assignment and/or element costing feature available. Additional information includes reassigning and reprocessing documents, establishing timekeeping groups, copy/paste schedule, etc.

**Course hours:** 2.5 hours

**Class Size:** 15

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## Non-Exempt Employees: Reporting Worked and Benefit Time Hours for Payroll Processing

**Target Audience:** Non-Exempt Employees

**Requirements:** None

Description: Familiarizes the non-exempt employee with the UAB Campus KRONOS Timekeeping System to document their daily worked hours for the current pay period. Also, introduces the Oracle Administrative Systems TEL document for reporting worked and benefit time hours for payroll processing.

**Course hours:** 1.5 hours

**Class Size:** 12

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## How to Request Oracle Responsibilities through ACF

**Target Audience:** Employees who approve documents or who manage/supervise "requestors" of Oracle documents

**Requirements:** UAB HR Officer Responsibility, UAB GA End User, or UAB GL End User

Description: Provides an introduction to end user responsibilities and how they are assigned. Who is eligible to add or terminate access? How to use the ACF (Access Control Form) to process a request to add or change responsibilities for an employee. What happens to an employee's access if they go on a leave of absence? Discuss the electronic approval process for ACF.

**Course hours:** 1.5 hours

**Class Size:** 15

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## Overview of the Oracle Finance System

**Target Audience:** Individuals using the Oracle finance application

**Requirements:** UAB FN Document Entry/Approval responsibility

Description: Introduces Oracle finance terminology, GL org structure, basic account structures for GL and GA, integration of the modules, the finance responsibilities, access and the finance forms

**Course hours:** 2 hours

**Class Size:** 15

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## Requisitions and Payment Requests: Tracking and Follow Up

**Target Audience:** Users with limited experience creating locating payment requests and requisitions in the Oracle Administrative Systems.

**Requirements:** UAB FN Document Entry/Approval or UAB Requisition Input responsibility

Description: Covers the available search mechanisms that are used to locate Payment Requests, purchase Order Requisitions and their associated invoices/payments. Topics include using Document Locator, Personal Worklist, Requisition Summary, Purchase Order Summary, & UAB Payment Request Inquiry. Also included are instructions for handling check transactions through Accounts Payable (cancelled checks, stop payments, etc.).

**Course hours:** 2 hours

**Class Size:** 15

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## Surplus Property System

**Target Audience:** Individuals responsible for creating and submitting electronic Equipment Disposition Forms (EDFs)

**Requirements:** Access to the Surplus Property System (SPS)

Description: The Surplus Property System (SPS) is a property disposition system that will allow departments to complete online requests for the equipment that is affiliated with their organizational access. The course will provide instruction on creating a variety of disposal requests, including disposing of tagged and non-tagged equipment.

**Course hours:** 2.0 hours

**Class Size:** 15

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## Retroactive: What You Need to Know about Payroll and Costing

**Target Audience:** Experienced users of the Oracle Administrative Systems or users that have completed the following classes: Using the ACT Form, ACT Document Reasons, and Managing Biweekly Time and Labor Costing on the TEL form.

**Requirements:** UAB HR Officer or UAB Salary Reclass responsibility

Description: Provides information related to the payroll/costing processes that occur once a retroactive (late) ACT document is completely processed. Discuss the impact of retroactive transactions on the organization and the employee/trainee. Specific topics covered include: managing effective dates, system edits, internal and external policies and procedures that govern personnel transactions, and locating payroll/costing information using system forms and extracts.

**Course hours:** 3 hours

**Class Size:** 15

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## Tracking Payroll and Costing Actions with the Oracle Administrative Systems

**Target Audience:** Employees responsible for providing HR and financial information to management which includes: researching of salary expenditures and reconciliation of accounts.

**Requirements:** Must have one of the following system responsibilities: UAB HR Officer, UAB GL End User or UAB GA End User.

Description: Provides users of the Oracle Administrative Systems HR and Financial Applications an in-depth look at tracking payroll source documents (.e.g. ACT, TEL, salary reclass) from creation through costing and finally, GA and GL posting. In addition, recommendations for utilizing system inquiry tools and reports will be given in order to assist users in managing personnel payroll expenditures and personnel account management.

**Course hours:** 2 hours

**Class Size:** 15

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## Understanding Oracle General Ledger and GL Reporting

**Target Audience:** Individuals who work with GL accounts

**Requirements:** UAB GL End User responsibility

Description: Provides an overview of the General Ledger (GL) and its function as UAB's official financial repository. Also provides detailed explanation of the account structure. Topics include identifying each account segment, what those segments define, and their importance to the overall account structure and financial system. The second half covers using the Inquiry and UAB Attributes menu options, as well as all reporting options available: explaining system-delivered and ad hoc GA reports, how to set parameters and create them, read and understand them, export applicable reports into Excel, and use reports to perform daily account management tasks. Includes information on setting up secondary recipients and using the Report Viewer.

**Course hours:** 3 hours

**Class Size:** 15

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## Understanding Oracle Grants Accounting

**Target Audience:** Individuals who wish to gain a working knowledge of the Oracle GA module

**Requirements:** UAB GA End User responsibility.

Provides an overview of the UAB Grants Application, its uses, the types of funding managed, and the accounting structure used within the module. Topics include understanding the GA account structure, its segments and how they combine to describe the work being performed and source of funding. Also covers using the inquiry options within the responsibility.

**Course hours:** 2.5 hours

**Class Size:** 15

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## Using the ACT Form

**Target Audience:** Individuals who wish to gain a working knowledge of the Oracle HR module and ACT forms

**Requirements:** UAB HR Officer Responsibility

Description: Provides an overview of the Oracle HR module with emphasis on locating and retrieving a personnel record, using data inquiry to review personnel information, and creating and updating personnel records using the ACT forms. Topics include basic ACT functionality including document types, reasons and statuses, and necessary attachments to be forwarded with each document reason. Also covered are instructions on locating and tracking ACT documents through the approval process.

**Course hours:** 3 hours

**Class Size:** 15



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## **WAM and the Workflow Officer**

**Target Audience:** Workflow Officers and employees who approve documents.

**Requirements:** UAB FN Document Entry/Approval responsibility

**Description:** Provide an overview of WAM (Workflow Approver Maintenance) and its functions. Discuss responsibilities of the Workflow Officer and other Workflow Administrative roles. How approvers and the notify person for an organization are set up in WAM. Approval basics for approving documents in Oracle; discuss workflow and personal work list. Also includes information on running reports in WAM.

**Course hours:** 2 hours

**Class Size:** 15