UC Flex Overview and Navigation
This online prerequisite course is designed to provide users with the knowledge and experience to navigate through SAP and is a prerequisite for all other UC Flex training courses. Once this course is completed you will have access to all of your approved reporting roles.

**Role Access: Decentral HR Viewer R/3**
This role runs HR display transactions and reports, views employee master data, organization unit hierarchy and HR role information within a specified department.

**Role Access: Decentral Financial Viewer R/3**
This role runs financial display transactions and reports, views and tracks financial data, tracks Requisitions (RXs) and Purchase Orders (POs) and reviews grant ledgers including budget, encumbrances and expenses.

Online course instructions for prerequisite training, **prior to attending additional instructor led training classes:**

1. **To begin:** [open this online course link in Internet Explorer](#)
   - Please follow these technical requirements to launch this course:
     1. Open this link in Internet Explorer and enable Compatibility View under Tools. Contact your local IT or the Helpdesk at 513-556-4357 to help with Compatibility Settings.
     2. If you are experiencing difficulties viewing this course, please open the Adobe Flash Player Global Security Settings Panel and select the Always allow option. Contact your local IT or the Helpdesk at 513-556-4357 to help with Adobe Flash Player.
     3. Since the online course and associated tutorials launch in a new browser window, either allow pop-up windows on your Internet Explorer (IE) - close all other browsers since it prefers IE - or click to "Allow Blocked Content" if you see a cautionary message at the top of the webpage, since these tutorials utilize ActiveX controls. **You may have to do so again once the tutorial begins "Loading" in its new IE browser window.**
     4. **SUGGESTION:** use earphones to listen to the audio provided or if you prefer, you may read the transcripts. (Look for icons on the bottom of the screen once launching the course to find it.)
   - If you are off campus when accessing this online course, you will also have to login to the UC VPN. [For additional instructions on the virtual private network at UC, please click here](#).

2. **At the Welcome to Ancile uPerform screen,** update time zone and language preferences.
   - If you have issues, please take a screen shot and email UCFlex@uc.edu for assistance.

3. **To complete this online course and register to attend additional UC Flex Training,** you meet the **70% minimum Assessment score. Please note: if you do not pass, please Retake the Assessment until you reach 70%.**

4. **Please take 3 minutes to help us to continually improve UC Flex training by completing the online course survey – [click here](#).**

5. **You are now prepared to take additional UC Flex training. [Register online here](#).**

Revised 03/2015
FI Asset Inventory Tracking
This course is designed to teach students how to create, change, and view assets in the UC Flex system including changing the location of an asset.

**Role Access: Decentral Inventory Tracker**
This role creates and changes Asset Master Records. Asset Master Records must be maintained for all capital assets in UC’s inventory. Each department may also elect to track items considered to be critical equipment.

Business Warehouse (BW) Reporting
This course will teach users how to utilize the UC Flex Business Warehouse system to run existing report queries, save variable entries, view data in different ways, change the format of a report, export data to MS Excel, print the data in PDF and bookmark the revised report into the desktop’s Internet Explorer Favorites list. We will be using the following report queries to learn these features: HR101, FM865 and FM805CH.

**Role Access: Decentral HR Viewer BW**
This role has access to run the available Human Resources (HR) reports in BW.

**Role Access: Decentral Financial Viewer BW**
This role has access to run the available Financial (FI) reports in BW.

**Role Access: BW Financial Super Viewer**
This role has access to run all available HR and FI reports in BW.

**Role Access: BW Labor History**
This restricted role has access to run Labor History reports in BW.

**Role Access: BW Time Management**
This role has access to run all hourly and salary time reports in BW.

**Role Access: BW P-Card**
This role has access to run P-Card related reports in BW.

**Role Access: BW Assets**
This role has access to run Asset Management reports in BW.

FI Customer Billing through Payment Process
This course is designed to teach students the invoicing process of external customers for UC products and services in the UC Flex system.

At the conclusion of this course, you will be able to:
- Describe the Customer Billing Through Payment process
- Enter customer invoices and credit memos
- Maintain parked documents
- Print forms and reports
- Display reports

**Role Access: Decentral Financial Processor – AR**
This role creates and maintains invoices in UC Flex to bill outside organizations.

Revised 03/2015
**UC Flex Financial (FI) Training Courses and Roles Information**

**FI Funds Reservation**
At the conclusion of this course, you will be able to:
- Perform key funds reservations activities for travel and departmental in the UC Flex system.
- Maintain funds reservations
- View lists of funds reservations

*Role Access: Decentral Funds Reservation Processor – FM*
This role establishes new funds reservations and manually liquidates funds reservations when applicable. Funds reservations are created when a department identifies a need to encumber funds outside of the purchase order and travel authorization (TA) process.

*Role Access: Decentral Travel Authorization Processor – FM*
This role establishes travel funds authorizations and manually liquidates this encumbrance when applicable. Travel authorization funds reservations are created when a department identifies a need to encumber funds for a travel activity, an activity that must be performed when a repayment is required.

**FI General Ledger Journal Entries**
This course is designed to teach participants to enter, maintain, and review General Ledger journal entries in the UC Flex system.

*Role Access: Decentral Financial Processor (Cost Transfers, Doc Type GT) – GL*
This role parks journal entries which are reviewed and posted by SPA. Users with this role park grant cost transfers. This role may also add or change descriptions on posted UC Flex accounting documents.

*Role Access: Decentral Financial Processor (Internal Billing, Doc. Type BL) – GL*
This role parks journal entries which are reviewed and posted by Financial Services. Users with this role park journal entries for internal billings to other UC departments and print invoices for their internal sales. This role may also add or change descriptions on posted UC Flex accounting documents.

*Role Access: Decentral Financial Processor (Journal Entries, Doc. Type JE) GL*
This role parks journal entries which are reviewed and posted by Financial Services. This role may also add or change descriptions on posted UC Flex accounting documents.

**FI Internal Orders**
This course is designed to teach students to create and maintain internal orders and order groups in the UC Flex system.

*Role Access: Decentral Internal Order Custodian*
This role creates internal orders when a department identifies a unique reporting requirement that is not being captured within the UC Flex cost center structure. The Internal Order Custodian establishes an order number in the range pre-established for that department/unit and maintains the orders.

**FI Non-Invoice Related Customer Payment Process (Deposits)**
This course is designed to provide an overview of the non-invoice related customer payment process and how to enter these payments in the UC Flex system.
At the conclusion of this course, you will be able to:

*Role Access: Decentral Financial Processor – Non AR (Deposits)*
This role enters A151 and A152 forms in UC Flex to park all payments that come into the University that are not related to a customer invoice.
UC Flex Financial (FI) Training Courses and Roles Information

**FI P-Card Processing**
This course is designed to teach participants how to process parked P-Card transactions in the UC Flex system.

*Role Access: Decentral P-Card Processor*
This role allocates and/or posts P-Card expenses directly in UC Flex and is responsible for inventory tracking functions relating to P-Card purchasing transactions.

**FI Requisitioning**
This course is designed to teach students how to create and display purchase requisitions in the UC Flex system.

*Role Access: Decentral Requisitioner*
This role creates requisitions which will be processed into purchase orders by the Purchasing Department.

**FI Small Dollar Invoice Processing**
This course is designed to teach participants how to process small dollar invoices in the UC Flex system.

*Role Access: Decentral Small Dollar Invoice Processor*
This role runs the direct invoice process allowing users to procure services or goods from companies for up to $300.00. The use of this process is intended to be the rare exception and is highly discouraged. Procuring services or goods from companies should be done by P-Card, Term Contract Release and/or Purchase Orders (for repetitive purchases).

**FI Term Contract Release Order Processing**
This course is designed to teach students how to process term contract release orders in the UC Flex system.

*Role Access: Decentral Term Contract Releaser - MM*
This role creates changes and prints Term Contract Release Purchase Orders.

**FI UC Flex Display and Reporting**
This optional reporting course is designed to teach participants how to run display transactions in the Financial Reports and Display folder and format financial reports in the UC Flex system. Please note: Business Warehouse FI reports will not be covered in this class. If interested, please sign up for the Business Warehouse Reporting course.

*Role Access: Decentral Financial Viewer R/3*
This role runs financial display transactions and reports, views and tracks financial data, tracks Requisitions (RXs) and Purchase Orders (POs) and reviews grant ledgers including budget, encumbrances and expenses.
UC Flex Human Resources (HR) Training Courses and Roles Information

HR Hourly Time Administration
This course is designed for Timekeepers and Approvers who record, change, display and approve hourly time for non-exempt employees. You may only be an Hourly Timekeeper or an Hourly Time Approver, not both for auditing purposes.

**Role Access: Decentral Hourly Timekeeper**
This role runs reports, records, and changes and displays time sheets for non-exempt employees.

**Role Access: Decentral Hourly Time Approver**
This role runs reports, approves and displays time sheets for non-exempt employees.

HR Initiating and Approving Personnel Change Requests (PCRs)
This course is designed for users who will initiate and approve the various PCRs. It will cover the process of when to submit, create, and approve PCRs

**Role Access: Decentral PCR Initiator**
This role processes personnel actions initiated as a PCR (Personnel Change Request) including Salary Adjustment, Separation, Special Payments, Leave of Absence (with pay, without pay, extension, and request for return from LOA), FMLA, Retirement, Hourly Employee Account Line Changes, Cost Distribution and Change Recurring Payment, Employee Schedule Changes.

**Role Access: Decentral PCR Approver**
This role approves or denies personnel actions (PCRs) initiated by PCR Initiators. The PCR Approved may have approval rights at the Unit, VP or Exception level.

HR Salary Leave Administration
This course will teach participants how to record, change, display, and approve salary leave time in the UC Flex system. You may be both a Salary Leave Administrator (similar to Hourly Timekeeper) and a Salary Leave Supervisor (similar to an Hourly Time Approver).

**Role Access: Decentral Salary Leave Administrator**
This role records and maintains salaried employee leave usage (i.e., vacation and sick time).

**Role Access: Decentral Salary Leave Supervisor**
This role records and maintains salaried employee leave usage (i.e. vacation and sick time) and validates data entered by a Salary Leave Administrator.

HR Display and Reporting
This optional reporting course is designed to provide UC Flex users focused class time to review various Human Resources display transactions available in the UC Flex system. Detailed navigation instruction will be provided as well as instructions on how to create variants and format report information. Please note: Business Warehouse HR reports will not be covered in this class. If interested, please sign up for the Business Warehouse Reporting course.

**Role Access: Decentral HR Viewer R/3**
This role runs HR display transactions and reports, views employee master data, organization unit hierarchy and HR role information within a specified department.

SuccessFactors (SF) Hiring Coordinators
This course will teach participants how to create and maintain requisitions and candidates in SuccessFactors Recruitment Management system and in organization management of UCFlex.

**Role Access: SF Hiring Coordinator**
**Role Access: OM PCR Initiator**