

Whether your company requires training for PeopleSoft® Financials, Supply Chain, HCM, or Technical topics, GP Strategies® is the training partner you need. GP Strategies provides onsite, private Oracle PeopleSoft training for corporate groups of four or more. As a leader in PeopleSoft training, we know that even the finest courseware falls flat without world-class instruction, which is why our instructors are experienced PeopleSoft implementation professionals. Get your project off on the right foot with our project-team training, and don't leave your end users in the dark—ask us about our user adoption services!

HUMAN CAPITAL MANAGEMENT

PSF600 Introduction to HCM

1 Day

This course serves as a prerequisite for other PeopleSoft HCM application classes and covers the key concepts behind the PeopleSoft HCM Suite. You will learn how to access and search through the PeopleBooks online help, navigate the HCM module, interpret specific HCM PeopleSoft tables, perform basic HCM transactions, and use Process Scheduler as a reporting tool. You will also be introduced to Fluid pages.

PSF602 Human Resources

3 Days

This course provides a solid foundation for implementing PeopleSoft Human Capital Management (HCM) for your organization. This course focuses on the flexibility that PeopleSoft HCM has to offer and provides implementation team members with a solid foundation on which to base implementation decisions. Through examples and activities, participants learn about and set up the core HCM foundation tables. After setting up these tables, students learn about data permission security, adding workers into the system manually and through the creation of template-based SMART hire. Lastly, they learn to maintain employment history for the workforce.

PSF603 Base Benefits

2 Days

This course provides a solid foundation for implementing PeopleSoft's Base Benefits functionality for your organization. Implementation team members examine benefit plans including health (medical, dental, vision), life (group life, supplemental life, dependent life), disability (LTD, STD), savings (401k, profit sharing), leave (vacation, sick, personal), and flexible spending accounts (FSAs). Activities include enrolling employees in benefit plans, setting up dependent and beneficiary data, running the Payroll Interface program to calculate benefit deduction amounts, and creating and retrieving historical benefit data.

PSF604 Benefits Administration

5 Days

This course provides a solid foundation for implementing PeopleSoft's Base Benefits functionality for your organization. Implementation team members examine benefit plans including health (medical, dental, vision), life (group life, supplemental life, dependent life), disability (LTD, STD), savings (401k, profit sharing), leave (vacation, sick, personal), and flexible spending accounts (FSAs). Activities include enrolling employees in benefit plans, setting up dependent and beneficiary data, running the Payroll Interface program to calculate benefit deduction amounts, and creating and retrieving historical benefit data.

PSF607 Position Management

1 Day

This course provides a solid foundation for implementing PeopleSoft's position management functionality for your organization. The Manage Positions component in PeopleSoft further defines human resources data from the jobcode level to the position level. Upon successful completion of this course, implementation staff will understand and define positions, describe the process of updating position changes to job data, enter a position, copy a position, enter information about an employee into a position, transfer an employee into a new position, transfer a position to a new location, reclassify a position with a new job code, and run multiple position reports.

PSF610 Time and Labor

4 Days

This class helps to understand the purpose of PeopleSoft Time and Labor. Describe shifts, work schedules, time reporter data, and time reporting templates. Learn how to create shifts, workdays, schedule templates in Time and Labor, and enroll a time reporter. You will also learn about workgroups as well as static and dynamic groups. You will learn how to define group creation security, create static and dynamic groups, report rapid time, generate Time Card reports, retrieve Absences from Global Payroll, describe and use self-service components, and report time using PeopleSoft Time and Labor. In addition, you will learn how to describe exceptions, adjust payable and paid time for time reporters, approve time, and view payable time summaries, work schedules, shift details, and holiday schedules.

PSF611 Payroll for North America

5 Days

The Payroll for North America US course covers how to use the functionality available in Oracle's PeopleSoft Enterprise Payroll for North America. Learn how to set up earnings codes, deduction codes, pay groups, holiday schedules, and tax locations. Set up and maintain employee tax data, additional pay, general deductions, and direct deposits. Set up balance IDs, pay calendars, and pay run IDs, and create and update pay sheets automatically, manually, or by rapid entry method. Calculate payroll, review calculation results, identify and correct errors, and confirm payroll. Produce paychecks and generate other payroll reports. In addition to typical on-cycle payroll processing, Payroll for North America provides functionality for a variety of off-cycle payroll events and other payroll requirements. Find out how to reverse a paycheck, record a manual check, produce online checks and final checks, and create a gross up check. Set up and process mid-period job changes and multiple jobs. Set up and process benefits deductions and garnishments. Learn about the employee self-service options available in PeopleSoft Enterprise ePay.

PSF613 Absence Management

5 Days

In this class students review the framework of the core Global Payroll product, starting with an examination of the overall organizational and processing framework of the system. During the class, students will set up absence entitlement and absence take elements to support PTO, special leave, and study leave. In each lesson, after students set up the basic absence components, they implement different rules of either the entitlement or the take element demonstrating the flexibility of the system. Students also see how absences feed data to the payroll system through generated positive input, and how changes to a payee's job record causing segmentation can affect how absences are calculated.

PSF615 Base Compensation and Budgeting

1 Day

This course provides a solid foundation for implementing PeopleSoft's base compensation and budgeting functionality for your organization. It gives participants the required information for setting up and administering salary compensations. You will learn how to define salary plans, grades, steps, and salary matrices in greater detail than the foundation table level. Lastly, you will be able to define salary budgets and plan salary increases accordingly and in detail.

PSF622 Profile Management

1 Day

This course will guide you through the major features of PeopleSoft Manage Profiles and provide you with a conceptual structure on which to base further learning when you return to your business environment. As the instructor leads you through the necessary implementation procedures, you will receive hands-on experience working with the major features, functions, and processes of the system.

PSF625 PeopleSoft HCM Query

2 Days

This two-day course is designed to teach you the basics of PeopleSoft Query and introduce you to the commonly used tables within PeopleSoft Human Resource Applications. You will create simple queries, utilize expressions, joins, aggregate features, and calculations, and understand the basics of table structure by the end of this course. All of these concepts will be reinforced by activities.

FINANCIALS

PSF640 Introduction to Financials and SCM

1 Day

The Introduction to PeopleSoft for Financials and SCM course introduces students to concepts used in all PeopleSoft Financial and SCM products. Students will learn how to navigate the PeopleSoft menu structure and how to personalize the display of content. Students are introduced to PeopleSoft table structure and the sharing of data across several tables through tableset sharing. Effective dating and row statuses are also covered in this course. Besides concepts common to most PeopleSoft applications, this course also introduces Financials and SCM-specific topics such as ChartField accounting and PS/nVision reporting. The course also covers high-level integration points between financials and SCM products.

PSF642 General Ledger

4 Days

This course teaches the fundamental concepts and features of PeopleSoft General Ledger (GL). Students gain working knowledge of the issues involved in a standard General Ledger implementation. They will learn how to implement GL, as well as establish, process, and report on financial transactions. Through real-life examples and hands-on lab activities, participants will establish their own GL business units and follow their unit through the implementation and processing of data. They will establish common setup options, and enter and post journals to their own ledgers. In addition, they will close year-end books and create financial reports with PS/nVision.

PSF643 Treasury

4 Days

This course discusses the entire PeopleSoft Treasury Management solution. The products discussed are Cash Management, Deal Management, and Risk Management. In addition, banking and bank reconciliation processes are discussed. In this class, you will learn to set up and maintain bank information and processes, and to establish bank account reconciliation methods. You will also learn to create and forecast cash needs and perform cash management duties such as analyzing account fees, creating facilities, transferring funds, defining funds settlement instructions, netting transactions, and managing treasury-specific accounting entries. Finally, you will learn to manage a deals instrument library and create and administer deal accounting. If you would like a 3 day course focusing only on Cash Management try our PSF644 course.

PSF644 Cash Management

3 Days

This course is a subset of the PeopleSoft Treasury course. The products discussed are Cash Management, banking, and bank reconciliation. In this class, you will learn to set up and maintain bank information and processes and to establish bank account reconciliation methods. You will also learn to create and forecast cash needs and perform cash management duties such as analyzing account fees, creating facilities, transferring funds, defining funds settlement instructions, netting transactions, and managing treasury-specific accounting entries.

PSF645 Accounts Payable

4 Days

In this course, students are introduced to the entire PeopleSoft Payables process, from setting up system tables to running Payables reports. Students will create their own business units and vendors to use throughout the class. Students will learn the different voucher types and how to copy information into vouchers using purchase orders. This course also introduces students to contract vouchers and recurring vouchers. This course processes vouchers through PayCycle and posting payments. Students learn how to manage data through mass updates and inquiries. Students also learn the basics of Journal Generator and how to send accounting entries to the general ledger. This course also covers how to review accounting entries and other Payables information.

PSF646 Accounts Receivable

4 Days

This course guides you through the major features of PeopleSoft Enterprise Receivables and provides you with a conceptual structure on which to base further learning when you return to your own business environment. You are guided through the necessary implementation procedures, and you learn how to efficiently process the transactions that affect customer account balances. Hands-on implementation activities guide you through defining receivables processing controls and entering customer information. In this course you perform standard receivables functions such as entering items and deposits, and applying payments to open items. You learn how to manage item maintenance and update customer history and aging, as well as create collection inquiries and generate statements. Activities also show you how to use the PeopleSoft Enterprise Receivables automatic processes for applying payments, automatically maintaining receivables items, and posting open items.

PSF647 Billing

3 Days

This course teaches you to use Enterprise Billing to customize, calculate, and submit invoices in multiple currencies and languages. Learn to manage bill cycles and streamline processes, creating a billing system that reflects the way you do business. You will learn to maintain customers, enter bills online, create consolidated and recurring bills, use accumulations, and generate invoices, deferred revenue, and unbilled revenue accrual. In addition, you will learn to create InterUnit customers and bills, manage installment bills, use multiple currencies, and run reports.

PSF652 Commitment Control

3 Days

The PeopleSoft Commitment Control course covers control budget setup and budget management. Learn to budget check source transactions originating from PeopleSoft applications or third-party systems and to report on results. In addition, understand the control budget close process. Gain an understanding of Commitment Control features enabled in PeopleSoft subsystems.

PSF654 Asset Management

4 Days

There is a focus on implementation considerations for PeopleSoft Asset Management throughout this course, along with asset depreciation, asset accounting, and reporting. They learn how to manage both capital and operating leases as well as define and maintain parent-child assets. Integration of Asset Management with other PeopleSoft applications is explored. Through detailed activities, participants learn how to configure the system and process transactions for asset depreciation, allocations, capital acquisition planning and tracking, like-kind exchanges, and tax reporting. You will learn to define your asset management system structure, add assets and perform asset maintenance, process depreciation and period-end close, inquire and report on asset information, integrate asset management with other PeopleSoft applications, and set up and maintain capital acquisition plans.

PSF655 Query for Financials Users

2 Days

This two-day course is designed to teach you the basics of PeopleSoft Query and introduce you to the commonly used tables within PeopleSoft Financial Management Applications. You will create simple queries, utilize expressions, joins, aggregate features, and calculations, and understand the basics of table structure by the end of this course. All of these concepts will be reinforced by activities.

SUPPLY CHAIN MANAGEMENT

PSF662 Inventory

3 Days

This PeopleSoft Inventory training course is an excellent introduction to the features and functions of the PeopleSoft Enterprise Inventory system. Learn how to set up basic options for all of the major features of PeopleSoft Inventory, including, creating inventory item definitions and constructing inventory business units to reflect the structure of your warehouses or other storage locations. You learn the basics of how to setup and use the PeopleSoft Cost Management system to properly record your inventory costs and create accurate accounting entries. This course guides you through the setup and use of all major inventory transactions, including; stocking inventory into your warehouse (putaway), tracking warehouse movement, adjusting stock levels, calculating replenishment quantities, transferring stock between warehouses, and conducting a physical count of stock. This course teaches you how to design the shipping processes of PeopleSoft Inventory (demand fulfillment) to match the physical shipping processes within your organization. Using the fulfillment engine, PeopleSoft Inventory provides every option from express shipment methods to detailed shipping steps used to reserve, pick, pack, and ship stock.

PSF663 Purchasing

4 Days

This course will cover several of the basic features and functions of PeopleSoft Enterprise Purchasing. It also covers several advanced features such as, creating and using purchasing contracts and using commitment control in PeopleSoft Enterprise Purchasing. Plus, the key integration points with other PeopleSoft applications are discussed. With the knowledge you gain from taking the course and exercising the extensive amount of activities in the course, you will leave the class having a good overall understanding of the Purchasing application and the other PeopleSoft Enterprise applications that integrate with Purchasing. Then once you are back in your environment you will be able to use this knowledge to begin an implementation of PeopleSoft Enterprise Purchasing.

PSF664 eProcurement

3 Days

In this course, you learn about the basic setup required for implementing PeopleSoft eProcurement. This set up includes the business unit, vendors, and purchasing items. You gain knowledge of how the requisition to purchase order process flow is completed. This perspective helps you with implementation decisions on how to set up your system, and also helps you in creating your business process practices. This course also covers direct connect setup, and how the system handles the changes created for requisitions. You learn how approval workflow is utilized with the PeopleSoft eProcurement application. The topics that cover process flows are designed to give you the overall vision of what the product can do for you to aid with your decision-making during implementation.

PSF667 Supplier Contract Management

3 Days

Supplier Contract Management provides you with the framework to create and manage the transactional procurement contracts used for executing purchases, as well as providing robust document management authoring capabilities to create and manage the written contract document using Microsoft Word. The system also provides a structured method to develop and manage the contract clause library and the life cycle and approval processing for documents.

PSF668 eSupplier

1 Day

PeopleSoft eSupplier Connection is a self-service Web application that features employee (internal) and supplier (external) facing transactions that enable your suppliers to view and modify their own business information at their convenience. Upon completion of this course, you will be able to understand the system setup, supplier/employee transactions, supplier inquiries, and supplier/employee analytics.

TECHNICAL/REPORTING

PSF120 SQR

This course teaches how the SQR programming language and SQL are used with your PeopleSoft system. SQR is a flexible and powerful programming tool for manipulating data, including the creation of interfaces and generating custom-formatted reports. Hands-on activities give participants practice with every concept covered. Participants write SQR programs that incorporate SQL and programmatic logic to manipulate data and generate reports that are essential to PeopleSoft implementation.

3 Days

PSF130 PeopleSoft Query

This course teaches participants how to create SQL queries using basic and advanced features of the PeopleSoft Query tool. Students will learn the fundamentals of Query Manager, including how to retrieve information from multiple tables, define criteria, use aggregate functions, and accept data input by users for filtering results. Students will also learn how to create various types of joins, expressions, subqueries, and unions. The hands-on activities in this course are created using real-world examples and data.

2 Days

PSF140 PeopleTools I

PeopleTools I is the prerequisite for all other PeopleTools courses. In this course, participants work with Application Designer to construct web-based PeopleSoft applications, from the database tables to the graphical interface. By the end of this course, participants will be able to create a complete PeopleSoft application using field record definitions, tables, pages and components.

5 Days

PSF141 PeopleTools II

This course takes your PeopleSoft development skills to the next level, covering advanced topics and techniques for more sophisticated applications and customizations. Participants will gain a deeper understanding of how PeopleSoft applications are constructed and customized for specific requirements. Hands-on activities allow the participants to practice and master what they learn.

5 Days

PSF142 PeopleTools I/II Accelerated

Accelerated virtual training on PeopleTools I/II. Combining exercises from our PSF140 and PSF141 into one hands on course. PeopleTools I PeopleTools I is the prerequisite for all other PeopleTools courses. In this course, participants work with Application Designer to construct web-based PeopleSoft applications, from the database tables to the graphical interface. By the end of this course, participants will be able to create a complete PeopleSoft application using field record definitions, tables, pages and components. PeopleTools II This course takes your PeopleSoft development skills to the next level, covering advanced topics and techniques for more sophisticated applications and customizations. Participants will gain a deeper understanding of how PeopleSoft applications are constructed and customized for specific requirements. Hands-on activities allow the participants to practice and master what they learn.

5 Days

PSF145 PeopleTools for Functional Users

The PeopleTools Functional Overview course is designed to teach the functional project team to work more effectively with the technical staff when addressing configuration versus customization discussions. In this course, participants work with Application Designer to examine and modify fields, records, pages and understand the necessity of implementing security with these applications. By the end of this course, participants will be able to understand the eight steps of customization design methodology and provide the necessary skills to complete the analysis to work effectively in a project setting.

3 Days

PSF170 PeopleCode Programming

5 Days

This course provides participants with essential skills in the use of the PeopleCode programming language, which is used throughout your applications. Participants will learn how to write and modify PeopleCode programs to validate data with custom business rules, maintain the referential integrity of the data in the database, execute SQL commands, and customize the look and feel of PeopleSoft applications dynamically at run-time. This course includes a thorough explanation of object-oriented PeopleCode (objects, properties, and methods), with hands-on activities. We provide a solid grounding in the techniques for traversing the buffer hierarchy (Rowsets, Rows, Records, and Fields).

PSF230 Security

3 Days

This course provides participants with essential knowledge of security within a PeopleSoft system. Participants will learn the different aspects of security as well as best practices for implementing and maintaining security in a PeopleSoft database. This course includes a thorough explanation of functional and technical topics including data permission security for PeopleSoft applications.

PSF231 FSCM Security

1 Day

This course is intended to guide students to gaining an overview understanding of security for PeopleSoft Financials. Students will be taught the basics of application security and reporting security. The course focuses on setting up and maintaining data permission security using the many available options. Those who need more technical details about how to implement LDAP and other security components may want to look at the PeopleSoft PeopleTools Security course.

PSF232 HCM Security

1 Day

Overview of security for PeopleSoft HRMS. Students will be taught the basics of application security and reporting security. The course focuses on setting up and maintaining data permission security using the many available options.

PSF250 Application Engine

3 Days

This course provides participants with the knowledge and hands-on practice that is essential to successfully use the Application Engine tool. Application Engine is a programming tool that allows technical developers to create programs that incorporate both SQL and PeopleCode to manipulate and maintain the data in your PeopleSoft System. It was developed by PeopleSoft to tie into the definitions that exist in your PeopleTools tables. Through hands-on activities, participants will learn how to write, maintain, and debug Application Engine programs. Participants will also work with File Layout definitions and use PeopleCode in Application Engine programs to import and export data in various formats.

CAMPUS SOLUTIONS

PSF680 Introduction to Campus Solutions

1 Day

This course provides an introduction to PeopleSoft Campus Solutions for implementation and upgrade teams. Topics include a general introduction to PS Terminology, Basic Concepts, Navigation, Security, Table Structure, and Module Area Overviews including Faculty Center and Student Center. The course will also covers how to view a variety of student information including Bio-demographical information (name, address, e-mail etc.), Program/Plan (Major), Schedule, and Service Indicators (Holds). This course is recommended for project leaders and team leads that will be interfacing with student records within Campus Solutions. The purpose of this course is to provide a context for campus to begin to have cross-functional conversations in Campus Solutions.

PSF682 Campus Solutions - Academic Structure

2 Days

In this course, participants complete activities that develop their knowledge of implementing academic structure for PeopleSoft Enterprise Campus Solutions as they revise and update an academic structure through online pages and Tree Manager. Participants learn about the difference between a single and multi-institution setup and how to define and use campus and location values and facilities as they relate to scheduling and facility groupings. Participants learn how to define academic careers as well as academic programs, plans, and sub-plans and look at the rules for defining academic terms and sessions and all related dates and time periods within an academic structure. Discussions abound about how each piece of the academic structure interacts with the others to form an interdependent system of rules and regulations that give business processes the foundation upon which they rely. Through a discussion of dynamic dates, students learn that many term and session dates affect more than one area of PeopleSoft Campus Solutions. Participants look at the association between setting up and organizing PeopleSoft Tree Manager and how security can then be established for specific departmental use of the course catalog, based on this hierarchy.

PSF683 Communications, Checklists, & Comments

2 Days

Participants learn how to set up 3C security for each of the 3Cs and how to manage 3Cs data including how to use the Communication Generation process and use the PeopleSoft 3C engine. Communications tasks include creating, assigning, updating and verifying communications, and generating letter and email communications. Checklists tasks include creating, assigning, and updating checklists for individuals, organizations, or events. Comments tasks include designing comments, and setting up and creating comment records. This class also covers how to use the 3C engine to automatically assign 3Cs in PeopleSoft Enterprise Campus Solutions.

PSF685 Campus Solutions - Recruiting & Admissions

3 Days

During the course, the recruiter learns to set up recruiting events and other core admissions setup values. The recruiter interacts with prospects through recruiting events eventually applications and corresponding supporting materials are submitted to PSUNV for admission. Through course lessons and activities, we enter application materials into the system and process test scores. Applicants are admitted and matriculated. The majority of the course centers on the recruiting and entering of prospects, tracking of applicants, and ultimate matriculation. The course also covers localization features for New Zealand, Australia, and the Netherlands.

PSF686 Campus Solutions - Student Enrollment

3 Days

Participants in this four-day course learn how to prepare for enrollment and how to enroll students. They learn how to set up the course catalog, schedule classes and set up dynamic dating. Participants also learn how to generate class permissions, create enrollment appointments, and add and activate student records. Finally, they learn how to enroll students, including how to resolve error messages and use wait lists.

PSF687 Campus Solutions - Academic Advisement

2 Days

This course presents the information you need to answer that all-important question: has this student completed his/her degree requirements? You will use your knowledge of an institution's academic structure, catalog offerings, and your understanding of the institution's degree requirements to organize and define the academic requirements in Oracle's PeopleSoft Academic Advisement application. You will explore a number of ways to create rules, from identifying conditions that must be satisfied, to listing courses that can be used to satisfy a requirement, to grouping rules that must be satisfied before a student can graduate, to establishing limits and other restrictions. You will also create ad hoc advisement reports to assist in the advisement process. You will also learn how to make exceptions for a student or groups of students, how to run a what-if scenario, and how to use expanded conditions.

PSF688 Campus Solutions - Academic Records

2 Days

This course covers the processes for maintaining a student's academic information. Through discussion and activities, participants learn how to maintain program, plan and sub plan data for students. They also learn how to process student withdrawals and cancellations, and award degrees. Participants learn how to generate grade rosters. They learn about the various ways to enter and post grades, and they learn how to assign midterm grades and lapse incomplete grades. Participants also learn how to create transcript types and process transcript requests and enrollment verifications, as well as how to perform end of term activities such as repeat checking, academic standing and honors and awards.

PSF693 Campus Solutions - Equation Engine

2 Days

This two day course examines the advantages of using Equation Engine as a method to specify rules or equations as part of your business process. It describes the Equation Engine's capability to read any table for which you have security access and to perform various arithmetic operations and external call subroutines. During the course, you learn the about the structure of an equation, write some basic equations, then edit and test a range of equations. The course is designed for functional users with a minimum of 6 months experience using PeopleSoft Campus Solutions and who have an understanding of SQL. It is designed to provide a basic understanding of PeopleSoft Equation Engine and introduce users to the ability to write equations.

PSF696 Query for Campus Solutions

2 Days

This 2 day course is designed to teach you the basics of PeopleSoft Query and introduce you to the commonly used tables within PeopleSoft Campus Solutions Applications. You will create simple queries, utilize expressions, joins, aggregate features and calculations and understand the basics of table structure by the end of this course. All of these concepts will be reinforced by activities.