CREATE A TRAINING PLAN

WHY:

In order to gain the necessary access to SAP and BW, each employee must have a training plan on record. The training plan determines the access the employee will be granted and the classes that must be taken to obtain access.

A training plan is valid for one year from the date it is approved. Any training plan that has not been completed within a year is no longer valid (for the uncompleted courses) and must be resubmitted if needed.

HOW:

1. Navigate to the IRIS Training Plan Request Form page
2. Enter the email address for the Research Area Security Officer. Currently that is Toni Smith (toni.smith@uky.edu).

1. Approver/Area Security Officer
Based on the submission guidelines stated in the Form Instructions section above, enter the appropriate e-mail address in the field below. This is the address the form will be sent to when submitted.

E-mail address for SLCM access only training plans: IRISSupport@uky.edu

<table>
<thead>
<tr>
<th>UK Department Number (5-digit number; Ex. 8G310)</th>
<th>ASO Delegate</th>
<th>E-mail Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Begins with a 1*, 3*, or 9*</td>
<td>Anthony Russell</td>
<td><a href="mailto:anthony.russell@uky.edu">anthony.russell@uky.edu</a></td>
</tr>
<tr>
<td>Begins with a 8* or 7*</td>
<td>Susan Wang</td>
<td><a href="mailto:spwang2@uky.edu">spwang2@uky.edu</a></td>
</tr>
<tr>
<td>Begins with a 4*</td>
<td>Toni Smith</td>
<td><a href="mailto:toni.smith@uky.edu">toni.smith@uky.edu</a></td>
</tr>
<tr>
<td>Begins with a H* or G*</td>
<td>Kerry Bradford</td>
<td><a href="mailto:kerry.bradford@uky.edu">kerry.bradford@uky.edu</a></td>
</tr>
</tbody>
</table>

3. Enter the Start/Effective Date.
   a. For a new employee, this is the same as their start date.
   b. For an existing employee, this is the day you are entering the training plan.

2. Reason for Training Plan
Enter the start/effective date and select the appropriate reason for submitting this training plan. Additional comments and/or special instructions can be noted also.

Start/Effective Date: (mm/dd/yyyy)

New Employee: Use Start Date
Current Employee: Use the date you enter the Training Plan Request.
4. Check the appropriate radio button and include any additional notes in the Comments/Special Instructions box.

2. Reason for Training Plan
Enter the start/effective date and select the appropriate reason for submitting this training plan. Additional comments and/or special instructions can be noted also.

**Start/Effective Date:** (mm/dd/yyyy)

- [ ] Brand New UK Employee
- [ ] Current Employee - New Position
- [ ] Current Employee - Same Position - New/Additional Access
- [ ] Rehired/Reinstated Employee
- [ ] Access Replacement ONLY (List all access to be removed in the Comments/Special Instructions field below and do not select anything in the 4. Course Selection section.)
- [ ] Other (Explain in the Comments/Special Instructions field below.)

**Comments/Special Instructions:** (Maximum length = 500 characters)

5. Enter the name and email address of the Business Officer in your area.

3. Requester and Employee Information
Complete all requester and employee information. **Any training plan received with incomplete information will be returned for re-submission.** Again, the Requester **must** be the employee’s Business Officer or designated College Contact.

**Requester Information**
- Name:
- E-mail Address:

**Department/Unit Business Officer**
6. Enter the Employee Information. If you do not have the information requested, contact Toni Smith for help.

7. Enter the Courses required for the employee.
   a. General Courses:
      i. All employees are required to complete the Statement of Responsibility one time. If you are entering a training plan update for an employee currently using SAP, they will not need this class.
      ii. UK_100 is a prerequisite for all SAP training classes. If an employee is currently using SAP, they will not need to repeat this class.
b. **Business Warehouse Courses:**
   i. The University uses the Business Warehouse reporting tool. From the drop down list, choose the appropriate reporting class. Since most VPR units do not maintain student records, you will most likely choose the first option BEX_300.

   ![Business Warehouse (BW) Courses](image)

   ii. Business Objects for End Users is a course that allows users to create their own reports. It is not a tool that we utilize extensively.

c. **Financial (FI) Courses:**
   i. **FI_200 Finance Overview** is a prerequisite for all other FI courses. If you are updating a training plan and the employee has already completed FI_200, they do not need to repeat the course.
   ii. **FI_CT_300 Cash Transmittals** is required to complete cash and check transmittals and to claim wire transfers and ACH transactions.
   iii. **FI_GU_310 GL Account Documents** is used to create journal vouchers.
   iv. **FI_GU_320 Statistical Internal Orders** is not a widely used transaction in the VPR area.
   v. **FI_PC_300 Procard Editing** is required for all employees who have a Procard and for all employees who edit Procard transactions.
   vi. **FI_FES_315 FES Data Processing & Actions** is a transaction for processing information for Faculty members. Be sure to choose the appropriate type and level of access from the drop down lists. Also, be sure to include the department numbers the employee will need to access.
   vii. **FM_BUD_300 Budget Maintenance** is required for employees who will create Budget Transfers and Budget Revisions.

d. **Grant Management (GM) Courses:**
   i. **FI_GM_200 PI Grant Budget Overview** is for Principle Investigators only.
ii. **FI_GM_310 Grant Management Analysis** will introduce you to the SAP transactions and BW reports used for Grants.

iii. **FI_GM_315 Grants Management Refresher** is only for an update to FI_GM_310.

iv. **FI_GM_320 GM Advanced Cost Sharing** will teach you transactions & reporting related to Grant Cost Share accounts.

e. **Human Resources (HR) Roles & Courses**

i. First choose the HR Personnel Actions Role.

1. Business Officer Roles: The first choice includes the necessary classes for creating Personnel Actions (hire & separate employees, enter overloads, etc) and for creating positions (limited to Student and Temporary positions). The second choice does not include the ability to create positions.

STEP 1: Choose the appropriate HR Role(s). The course requirements are listed next to each.

2. Options three through six will allow the employee access to view Employee Master Data but will not allow them to make any changes to employee data.

STEP 1: Choose the appropriate HR Role(s). The course requirements are listed next to each.

ii. Next, enter your department number(s).

iii. **HR_PA_340 Faculty Actions** is used to maintain information for Faculty Members. This action is not widely used in the VPR area.
f. Materials Management (MM) Courses
   i. **SRM_SHO_300 SRM Shoppers** is required for employees who will create Shopping Carts. Shopping Carts are used to purchase office supplies and also to purchase items via Purchase Order. **NOTE:** If an employee creates Shopping Carts, they are unable to be an approver in the Purchasing process.
   ii. **SRM_CON_300 SRM Goods Confirmations** is required for employees who will complete Goods Receipts for Purchase Orders.
   iii. **MM_PRD_300 Payment Request Document (PRD) Creator** is required for employees who create PRDs. The PRD replaced the DAV in FY2013. **NOTE:** If an employee creates PRDs, they are unable to be an approver in the Purchasing process.
   iv. **MM_APP_300 Combined Approvers** is required for anyone who has the role of approving in the Purchasing process. This class covers the approval process for SAP Requisitions, SRM Shopping Carts and PRDs. The approval level for VPR Center/Institute/Unit Business Officers will be Level 1. The RAFA Business Office is the Level 2 approver for the VPR area. **NOTE:** If you are an approver in the Purchasing process, you are not able to create PRDs or Shopping Carts.

g. Plant Maintenance (PM) and Student Lifecycle Management (SLCM) Courses are not utilized by employees in the VPR area.

8. Once you have chosen all necessary courses, you will submit the training plan. Click on the SUBMIT IRIS Training Plan Request Form. This will route the training plan to the RAFA office for approval and submission to the IRIS team. Please note, clicking on Reset form will delete all information entered on the Training Plan Request form.

### 5. Training Plan Submission

*Please verify that all sections of this form have been completed accurately, and then click on the SUBMIT IRIS Training Plan Request Form button below.*

*Any training plan received with incomplete information and/or insufficient approvals will be returned for re-submission.*

Once IRIS Training has received and processed this training plan request, a confirmation e-mail will be sent to all employees listed on the form.

**Caution:** The RESET Form button will clear all fields and selections.