



# Finance Enterprise

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Course Catalog

The background of the page is a photograph of a city street, likely San Francisco, taken from an elevated position. A woman in athletic wear is running on a paved path in the foreground. The street below is lined with multi-story residential buildings, and a large palm tree is visible on the left. The scene is bathed in warm, golden light, suggesting late afternoon or early morning. A thick orange horizontal bar is positioned below the text "Course Catalog".

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Sept 23

## Contents

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<b>Overview</b> .....	<b>1</b>
Overview 18.1 .....	1
<b>Accounts Receivable &amp; Cash Receipts</b> .....	<b>2</b>
AR & CR 18.1 .....	2
Creating and Billing an AR Customer 18.1 .....	2
<b>Human Resources &amp; Payroll</b> .....	<b>4</b>
HY & PY 18.1 .....	4
HR - Employee Online 18.1 .....	4
New Employee Setup - Human Resources Tables 18.1 .....	4
New Employee Setup - Payroll Tables 18.1 .....	5
Payroll Processing 18.1 .....	6
<b>General Ledger</b> .....	<b>7</b>
General Ledger 18.1 .....	7
<b>Requisition to Check</b> .....	<b>8</b>
Requisition to Check Process 18.1 .....	8
<b>Person &amp; Entity</b> .....	<b>9</b>
PEUPPE 18.1 .....	9
<b>Cross Product Topics</b> .....	<b>10</b>
Getting Started with CentralSquare University (CSU) .....	10
Getting the Most Out of Your CentralSquare Customer Portal .....	11
Introduction to CentralSquare University (CSU) .....	12

## Overview

### Overview 18.1

**Description:** This program will explore basic navigation, searching, Workspaces, new functionality, and more!

**Duration:** 56 minutes

Course/Description	Duration
<b>Workspaces</b> <ul style="list-style-type: none"><li>In this course, you will explore the new Workspaces within CentralSquare Finance Enterprise 18.1.</li></ul>	18 mins
<b>Screen Navigation</b> <ul style="list-style-type: none"><li>Discover how to navigate the new screen design within CentralSquare Finance Enterprise 18.1.</li></ul>	23 mins
<b>What's New</b> <ul style="list-style-type: none"><li>Find out what's new in the CentralSquare Finance Enterprise 18.1 subsystems.</li></ul>	15 mins

## Accounts Receivable & Cash Receipts

### AR & CR 18.1

**Description:** In this program, you will learn about the various screens within the Accounts Receivable/Cash Receipts module.

**Duration:** 1 hour 31 minutes

Course/Description	Duration
<b>Workspace &amp; Accounts Receivable Codes</b> <ul style="list-style-type: none"><li>In this course, we will explore the Accounts Receivable Workspace and Codes.</li></ul>	13 mins
<b>Interactive Cash Receipts – Set Tab</b> <ul style="list-style-type: none"><li>Let's explore the Set Tab in the Interactive Cash Receipts screen.</li></ul>	16 mins
<b>Interactive Cash Receipts – Receipt &amp; Customer Changes Tab</b> <ul style="list-style-type: none"><li>In this course, you will learn about the Receipt Tab and the Customer Charges Tab.</li></ul>	20 mins
<b>Interactive Cash Receipts – Misc. Payments Tab</b> <ul style="list-style-type: none"><li>Let's learn about the Misc. Payments Tab within the Receipt Tab.</li></ul>	20 mins
<b>Create/Update Cash Receipt Set</b> <ul style="list-style-type: none"><li>Explore the Create/Update Cash Receipt Set screen.</li></ul>	11 mins
<b>Assessment</b>	11 mins

### Creating and Billing an AR Customer 18.1

**Description:** This program focuses on Account Receivable processing within CentralSquare Finance Enterprise.

**Duration:** 45 minutes

Course/Description	Duration
<b>Customer Creation</b> <ul style="list-style-type: none"><li>Let's explore how to create a customer in the system.</li></ul>	15 mins

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Course/Description	Duration
<b>Invoice Creation &amp; Processing</b> <ul style="list-style-type: none"><li>• Discover how to create an invoice, as well as how to process it.</li></ul>	15 mins
<b>Reporting</b> <ul style="list-style-type: none"><li>• Let's explore all reports associated with how to create and bill an AR customer</li></ul>	15 mins

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## Human Resources & Payroll

### HY & PY 18.1

**Description:** This program will explore the Human Resources/Payroll modules.

**Duration:** 1 hour 10 minutes

Course/Description	Duration
<b>Employee Master</b> <ul style="list-style-type: none"><li>Learn how to create a new employee in the Employee Master screen.</li></ul>	18 mins
<b>Employee Quick Pay Assignments</b> <ul style="list-style-type: none"><li>In this course, we will explore the Employee Quick Pay Assignments screen.</li></ul>	16 mins
<b>Employee Pay Related Assignments</b> <ul style="list-style-type: none"><li>Explore the Employee Pay Related Assignments screen.</li></ul>	14 mins
<b>Employee Benefits, CDH Assignments, Education &amp; Skills, and Employee Tracking</b> <ul style="list-style-type: none"><li>In this course, we will discover the Employee Benefits, CDH Assignments, Education &amp; Skills, and Tracking screens.</li></ul>	11 mins
<b>Assessment</b>	11 mins

### HR - Employee Online 18.1

Course/Description	Duration
<b>Employee Online</b> <ul style="list-style-type: none"><li>Explore the tabs available to you in Employee Online.</li></ul>	24 mins

### New Employee Setup - Human Resources Tables 18.1

**Description:** This program focuses on setting up HR tables within CentralSquare Finance Enterprise.

**Duration:** 32 minutes

Course/Description	Duration
<b>HRTBCE, HRTBSC, &amp; HRTBSL</b> <ul style="list-style-type: none"> <li>In this course, we will explore the Entity Specific HR codes (HRTBCE), the Salary Schedule codes (HRTBSC), and the Salary definitions (HRTBSL) screens used in setting up a new employee in the HR tables.</li> </ul>	17 mins
<b>HRTBJB, HRTBPC, &amp; HRTBBE</b> <ul style="list-style-type: none"> <li>Let's explore the Job Code definitions (HRTBJB), the Position Code definitions (HRTBPC), and the Benefits definitions (HRTBBE) screens use in setting up a new employee in the HR tables.</li> </ul>	15 mins

## New Employee Setup - Payroll Tables 18.1

**Description:** This program focuses on setting up payroll tables within CentralSquare Finance Enterprise.

**Duration:** 1 hour 2 minutes

Course/Description	Duration
<b>PYUPHN &amp; PYUPPR</b> <ul style="list-style-type: none"> <li>In this course, we will explore the Payroll Entity definitions (PYUPHN) and the Pay Period definitions (PYUPPR).</li> </ul>	16 mins
<b>PYUPSC, PYUPCA, &amp; PYUPHH</b> <ul style="list-style-type: none"> <li>This course will explore the Work Schedule definitions (PYUPSC), Payroll Calendar definitions (PYUPCA), and the Hour definitions (PYUPHH).</li> </ul>	17 mins
<b>PYUPPY, PYUPDD, &amp; PYUPCC</b> <ul style="list-style-type: none"> <li>In this course, we will explore the Pay Class definitions (PYUPPY), the Contribution definitions (PYUPDD), and the Deduction definitions (PYUPCC).</li> </ul>	17 mins
<b>Assessment</b>	12 mins



## Payroll Processing 18.1

**Description:** This program focuses on processing payroll using CentralSquare Finance Enterprise.

**Duration:** 51 minutes

Course/Description	Duration
<b>Part 1 of 2</b> <ul style="list-style-type: none"><li>• Explore payroll processing, including the various screens and jobs required.</li></ul>	21 mins
<b>Part 2 of 2</b> <ul style="list-style-type: none"><li>• Let's continue to explore how to process payroll.</li></ul>	18 mins
<b>Assessment</b>	12 mins

## General Ledger

### General Ledger 18.1

**Description:** This program focuses on the General Ledger function in CentralSquare Finance Enterprise.

**Duration:** 35 minutes

Course/Description	Duration
<b>GLUPGN</b> <ul style="list-style-type: none"><li>In this course, we will explore the General Information – General Ledger screen.</li></ul>	21 mins
<b>GLJEUB</b> <ul style="list-style-type: none"><li>In this course, you will discover the Create/Update Journal Entry Set screen.</li></ul>	14 mins

## Requisition to Check

### Requisition to Check Process 18.1

**Description:** In this program, you will explore the Requisition to Check Process.

**Duration:** 1 hour 55 minutes

Course/Description	Duration
<b>Order &amp; Pay Vendor – Person/Entity Information Screen</b> <ul style="list-style-type: none"> <li>In this course, you will explore the function of the Person/Entity Information screen in the Requisition to Check Process.</li> </ul>	15 mins
<b>Order &amp; Pay Vendor – Purchase Requests Screen</b> <ul style="list-style-type: none"> <li>Explore the function of the Purchase Requests screen.</li> </ul>	17 mins
<b>Order &amp; Pay Vendor – Print PO's &amp; Direct Update of Encumbrances Transactions Screen</b> <ul style="list-style-type: none"> <li>Explore the functions of the Print Purchase Orders and Direct Update of Encumbrances Transactions screens.</li> </ul>	12 mins
<b>Receive/Invoice</b> <ul style="list-style-type: none"> <li>Let's learn how to create receiving and invoicing for a transaction.</li> </ul>	27 mins
<b>Pay Invoice</b> <ul style="list-style-type: none"> <li>This course will focus on how to pay the invoices.</li> </ul>	15 mins
<b>Bank Reconciliation</b> <ul style="list-style-type: none"> <li>In this course, we will explore how to reconcile bank statements.</li> </ul>	12 mins
<b>Assessment</b>	17 mins

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## Person & Entity

### PEUPPE 18.1

**Description:** In this program, you will explore the fields and tabs in the header, email, and address portion of the PEUPPE screen.

**Duration:** 46 minutes

Course/Description	Duration
<b>Header Portion</b> <ul style="list-style-type: none"><li>Discover the functionality of the fields in the header portion of the Person/Entity screen.</li></ul>	24 mins
<b>Address and Email Portion</b> <ul style="list-style-type: none"><li>In this course, we will explore the Address and Email tabs in the PEUPPE screen.</li></ul>	22 mins

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## Cross Product Topics

### Getting Started with CentralSquare University (CSU)

Course/Description	Duration
<b>Getting Started with CentralSquare University (CSU)</b> <p>CentralSquare University (CSU) is an online learning portal where you can register for live, instructor-led courses and access self-paced, eLearning courses. The self-paced, eLearning courses are also referred to as on-demand, eLearning courses since they are available 24 hours a day, 7 days a week. Upon completion of this course, you will be able to log on to CSU, access assigned courses, and contact the CSU support team.</p>	4 mins

## Getting the Most Out of Your CentralSquare Customer Portal

Course/Description	Duration
<p data-bbox="191 426 1036 457"><b>Getting the Most Out of Your CentralSquare Customer Portal</b></p> <p data-bbox="191 485 1040 659">CentralSquare Customer Portal provides access to resources including an extensive knowledge base, a user community, access to software updates for selected CentralSquare products, and the ability to interact with CentralSquare Support and other teams. Some examples of what you can do in the portal include:</p> <ul data-bbox="201 688 1036 1161" style="list-style-type: none"><li data-bbox="201 688 691 720">• Entering and tracking support cases</li><li data-bbox="201 747 1036 814">• Searching the knowledgebase for customer and CentralSquare employee generated information</li><li data-bbox="201 842 927 909">• Locating information about your product line or specific applications</li><li data-bbox="201 936 1027 1003">• Accessing various help and informational documents including release notes and artifacts</li><li data-bbox="201 1031 980 1098">• Communicating/Posting messages from product users and CentralSquare employees</li><li data-bbox="201 1125 789 1157">• Working with discreet member communities</li></ul> <p data-bbox="191 1188 1032 1362">CentralSquare directors Joe Kugler and Sandy Bellamy from the knowledge management and support team provide an overview, demonstration, and suggested techniques for effectively using the customer portal. This instructor-led session was conducted in July 2023.</p>	<p data-bbox="1071 426 1247 457">1 hour 7 mins</p>

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## Introduction to CentralSquare University (CSU)

Course/Description	Duration
<p><b>Introduction to CentralSquare University (CSU)</b></p> <p>You may know how to access CentralSquare University (CSU), but do you know how to track your learning progress, enroll yourself in courses of your choosing, and register for live sessions? This interactive course teaches you about some of CSU's lesser-known features. The aim of this course is to prepare you to have richer learning experiences.</p>	8 mins