

PeopleSoft Training: Student Financials Release 9.0

Course (4 Days)

In this course, participants will learn how to set up the tables that define the way PeopleSoft calculates tuition and other fees. The Student Financials accounting structure, which is comprised of SF Business Units, Account Types, and Item Types as well as Security Options unique to the module, will be reviewed.

In addition to various hands-on activities, participants will create tuition calculation rules in a workshop setting. Manual creation of groups of transactions and using workflow to approve groups will be covered.

The interface between Student Financials and Financial Aid and its impact on student accounts will also be discussed. Participants will learn how to perform payroll and accounts payable refunds for individual students and groups of students. Finally, participants will generate invoices on activities that have occurred during the class using XML Publisher.

Day 1

- Student Financials Process Overview
- Setting Up Tuition Calculation Components
- Running Tuition Calculation

Day 2

- Student Financials Structure Tables Review
- Using Student Financials Self-Service
- Securing Student Financials

Day 3

- Tuition Calculation Components Workshop
- Setting Up Additional Fees
- Maintaining Receivables

Day 4

- Student Financials and Financial Aid - Anticipated Aid
- Processing Refunds
- Billing

Excerpts from Student Evaluations

The instructor was the best instructor I have ever had. Thank you for a great class!

The documentation is fantastic!

Excellent!! Loved those cheat sheets.

Excellent course. It was definitely more meaningful to work with our own system and data.

Excellent learning experience (the best among all PeopleTools classes that I have taken)!

The training material was extremely helpful. It was easy to follow and was a great tool in the learning process. I can see using it on a regular basis until I feel confident that I fully understand the process.

You have been doing a wonderful job with these courses. Thank you for your knowledge, patience & flexibility.

He is an excellent teacher, very knowledgeable about the course and material. He even keeps the class interested in the subject.

Very responsive to questions; good, relaxed teaching style.

The book is awesome – the class was very valuable! Thanks.

Very good class...materials are well prepared and class is very organized and planned out.

Very effective instructing style. Made class fun and interesting.

Great presentation style. Responsive to student questions. Thanks.

Good class. Very helpful and effective. This is one of the best instructors that I had.

Excellent teacher and well-organized class. I really enjoyed the class and look forward to the next class.

Course was great, reinforced things I kind of know but was not sure about. Speed of course was good.

About Io Consulting

Io has an extensive record of accomplishment and a full range of services available to support Higher Education institutions. Expert level offerings include:

- Strategic Planning
- Project Management
- Business Process Reengineering
- Software Consulting
- Fusion Middleware Services
- Technical and Functional Training
- Quality Assurance Program

Io Consulting's expert level trainers and consultants have first-hand experience with Higher Education and IT business practices as well as in-depth knowledge of the Oracle|PeopleSoft applications and Fusion Middleware technologies.

An Oracle Certified Partner, Io Consulting has successfully led a variety of projects and trainings for both private and public institutions as well as for statewide system efforts. Io's customer list includes The Ohio State University, Duke University, The California State University System, Pepperdine University, and the University System of Maryland.

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