

Sierra-Cedar Training provides the highest quality PeopleSoft Functional Training in the most cost-effective way, delivered with fun, energy, and enthusiasm. For more information, review our functional course listing.

Introduction to PS for Campus Solutions Release 9.0

This one-day class is recommended for users new to PeopleSoft. It covers both fundamental PeopleSoft concepts as well as those unique to Campus Solutions. This course will cover PeopleSoft terminology and navigational structure. Participants will learn how to find components and personalize content for themselves. They will also learn how information is stored in the database and various methods of retrieving data. The critical concept of effective dated tables for both setup and transaction data will be discussed. A high level review of academic structure as well as an introduction to SetIDs and TableSet sharing are included. The Instructor will demonstrate tasks that can be performed using the student self-service pages. The participants will learn how to run processes and reports, and access help through online PeopleBooks. Service Indicators, which are holds or enhanced services that can be attached to students or organizations, will be discussed. Participants will also identify processes where Population Selection can be used.

Academic Structure Release 9.0

Academic Structure is the foundation of your PeopleSoft Campus Solutions system. This two-day class assists you in making the critical decisions upon which your system rests.

In this course, the instructor will show participants how to use Set Up Manager to create a list of tasks, which needs to be performed sequentially to create the academic structure. SetIDs and TableSet sharing will be discussed. The major pieces of academic structure: academic institution, academic groups, academic careers, academic programs, and academic plans will be examined. The instructor will discuss the physical portion of the academic structure including campuses, locations, buildings, and facilities. Participants will learn that terms and sessions are administrative units of time and control how classes are scheduled and fees are charged. Academic Organizations, which represent academic departments and other administrative entities, will be reviewed. Participants will also learn how to secure subject areas with the academic organization tree.

3C's Release 9.0

The 3Cs are comprised of Communications, Checklists, and Comments. This two-day class teaches participants how to set up and secure communications, checklists, and comments. The instructor will walk through an example of creating an XML Report Definition used to send emails from the Communication Generation process. Each of the 3Cs can be assigned manually or by using the 3C Engine. Participants will learn how to do both. The four different methods available to update checklist items will be discussed. Participants will see how checklists can be viewed using self-service. Through hands-on activities and a workshop, participants will create instances of the 3Cs that they will be able to use at their institution.

Recruiting and Admissions Release 9.0

This three-day class begins with the recruiting effort. Participants will create a recruiting structure including recruiting centers, referral sources, and recruiting categories. Participants will see how prospects can request information from the institution and how the institution can determine what they want to know about the prospect. The recruiting effort can be done by geographic location. Participants will examine the region tree to manage this task. Participants will learn five methods to create prospects in the database, including using loading test scores. Once a prospect becomes an applicant, participants will learn how to assign them a checklist of required materials and track the receipt of that information. The instructor will demonstrate loading applications electronically. Loading transcript information, both manually and electronically, will also be discussed. Participants will examine evaluation criteria, admit and matriculate students. Finally they will set targets and report on the results.

Student Records Release 9.0

In this four-day class, participants learn how to create the course catalog including enrollment requirements (pre-requisites), repeat rules, and final exam schedules. Once courses are created, participant will learn how to schedule classes. For those classes that don't fall into a traditional scheduling model, participants will create dynamic date rules and schedule a dynamically dated class. They will also create a course that requires department or instructor permission and see how that permission can be granted. To control enrollment, participants will create enrollment appointments for students. They will add individuals to the database, make them students, and enroll them in classes. Participants will also learn how to resolve errors based on the rules created. Finally, they will learn how to rollover schedule of classes from one term to another.

Academic Records Maintenance Release 9.0

Once the basic Student Records structure is completed, additional tasks will be performed. In this two-day course, participants will learn how to create and use attendance rosters. Grading structure will be reviewed and grades will be entered via administrative pages and using self-service. Dropping classes and withdrawing from the institution will be processed. The academic and financial impacts of those actions will be discussed. Honors and awards will be defined and rules to calculate academic standing will be discussed. Repeat checking can be performed during enrollment, grading or as an end of term process. Participants will discuss repeat rules and practice each of the options. Transcript types will be reviewed and the delivered XML transcript will be viewed. Enrollment verification reports can be processed online or requested via self service.

Academic Advisement Release 9.0

The Academic Advisement module determines if students have completed graduation requirements. In this three-day class, participants learn how to set up course lists, requirements, and requirement groups to define the conditions necessary to earn a degree. Degree audit reports will be created allowing students or staff to track satisfaction of requirements. Students can also track their degree progress by using the My Academic Requirements in self-service and can run "what-if" reports to see if requirements have been satisfied. The Program Guide represents partial use of Academic Advisement and does not show requirement satisfaction.

Enrollment Backpack Release 9.0

The Enrollment Backpack is the broad term defining self-service enrollment and academic advisement activities. The four main categories are Search, Plan, Enroll, and My Academics. In this one-day class, participants will select self-service options for both Student Records and Academic Advisement to be used in the EBP. Academic Advisement versus using the Program Guide will be discussed. Participants will practice using all options in the EBP including searching for classes, placing classes in the shopping cart, enrolling in classes, and reviewing requirements for graduation.

Recommended pre-requisites: Student Records and Academic Advisement classes.

Transfer Credit Release 9.0

In this one-day course, participants will set up the structure to support the evaluation of transfer credits, test scores, and other credits. External Organizations represent either high schools or other higher education institutions. Once the external organizations have been defined, additional structure will be created to define subjects and courses for that organization. If desired, several organizations can share a catalog. Once external courses are defined, they will be mapped to internal courses in transfer components. Participants will process transfer credit both manually and using the batch process. Finally, the Transfer Credit Report will be viewed.

Student Financials Fundamentals Release 9.0

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.

Cashiering Setup Release 9.0

In this one-day class, participants will define the cashiering structure, which includes target and tender keys, departmental receipts, cashiers, cashiering offices, and registers. Workflow can be used to approve departmental receipts if desired. Student Financials structure as it is used in cashiering will be reviewed. Cashiering General Ledger options will be discussed. Reasons for voiding transactions will be created. Participants will open the cashiering office, open cashiers and open registers and then post and balance transactions. Departmental Receipts will be created.

Recommended pre-requisites: Student Financials.

Collections Release 9.0

This one-day course will focus on the Collections functionality within Student Financials. It is assumed that class participants have familiarity with Student Financials structure. Exposure to the 3Cs would be helpful as well. Beginning by setting up your aging rules, you will be able to define separate collection criteria for both students and organizations. Collectors will be created. Customers will be assigned to collectors based on criteria of your choice. If desired, you can add workflow to notify collectors when they have new customers with which to work. Using the collection effort pages, you can assign any or all of the 3Cs to students or organizations to assist in managing this process. You can create a “promise to pay” checklist, which can show in self-service. Additionally you can assign a letter code reminding them of their obligation. Collection agreements are a form of payment plans that are assigned to individual students. Finally, if all efforts fail, you will see how to write off a customer account.

Financial Aid Fundamentals Release 9.0

In this four-day class, participants learn how to define the Aid Year structure to comply with federal guidelines. Academic structure is reviewed to determine the components that impact financial aid processing. Aid Year activation for individual students is covered, as well as the Population Selection batch process. The loading and correction of ISIRs will be reviewed. Participants will learn how to build FA term data for single students or for a group, which allows FA staff to make changes without impacting Student Records. Budgets will be created to calculate the COA (cost of attendance). The instructor will review Financial Aid Item Types, which represent the transaction details for FA and Student Financials. Participants will discuss packaging plans to award aid, disbursement plans, and rules to determine how and when aid is received and how to use self-service to allow students to view and accept FA awards. Equation Engine will be reviewed for both selecting students for packaging and adjusting award amounts. External awards (aid from outside sources) will be shown for both self-service and online administrative pages.

Equation Engine Release 9.0

This two-day course provides participants an in-depth look at Equation Engine. Through various hands-on activities and walk-throughs, students learn how to create and test new Equation Engine programs as well as utilize and edit delivered equations. The essential role Equation Engine plays in Financial Aid and Student Financials will also be discussed.

Campus Solutions Row-Level Release 9.0

This 2-day course is designed to provide participants with essential knowledge in securing their PeopleSoft Campus Solutions Applications. Security components and processes within various modules will be discussed. Through classroom discussions and hands-on activities, participants will learn the different aspects of security as well as best practices for implementing and maintaining PeopleSoft row-level security.

CS Common Changes Release 9.0 Workshop

This workshop provides an overview of the changes that have cross-module effects in Campus Solutions release 9.0.

Financial Aid Release 9.0 Delta Workshop

This workshop provides an overview of the Financial Aid enhancements introduced in release 9.0.

Recruiting and Admissions Release 9.0 Delta Workshop

This workshop provides an overview of the Recruiting & Admissions enhancements introduced in release 9.0.

Student Financials Release 9.0 Delta Workshop

This workshop provides an overview of the Student Financials enhancements introduced in release 9.0.

Student Records Release 9.0 Delta Workshop

This workshop provides an overview of the Student Records enhancements introduced in release 9.0.

www.Sierra-Cedar.com • 866.827.3786 • Contact@Sierra-Cedar.com

Sierra-Cedar delivers industry-focused client success by providing consulting, technology, and managed services for the deployment, management, and optimization of next-generation applications and technology.