University of Central Florida

Student Financials - Inquiry

Basic Navigation

Finance and Accounting
Student Accounts

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Introduction

UPK General Information
This course uses a User Productivity Kit (UPK) format. This format uses a choice of playback modes selected from topics in an outline. These playback modes are different methods that you can use to learn about a topic.

Outline Levels
The structured outline upon which this course is built contains three levels.

• **Module** (represented in the outline by a purple book icon) is the highest level.
• **Lessons** (an icon resembling a stack of papers) comprise the second outline level.
• **Topics** (an icon resembling a single sheet of paper) comprise the third outline level.

Use the plus (+) and minus (-) symbols to expand or collapse the levels.

Playback Modes
To begin the course, expand the outline to the topic level. Then, select a topic, which will activate the three playback modes near the top of the screen.

• **See It!** Learn by watching an animated demonstration of the steps needed to perform a task. All activities, such as moving the mouse, will be completed automatically for you.
• **Try It!** Learn interactively in a simulated environment. The system will prompt you with the actions you should perform to complete a task.
• **Do It!** Learn interactively using live data. Test the knowledge you gained from training by completing the task on your own.

Click the icon for the playback mode you selected to launch the UPK Player in a new window. If you need to pause a screen in the See It! mode, click the Pause link in the lower right corner of the text bubble. To resume playback, click the blinking Resume link in the text bubble.

Links
When the instructions in a topic frame say, "Click here," you must be in either the Try It! mode or the Do It! mode for the link to become active. Links are inactive in the See It! mode.

Jump-in Points
An arrow icon displays to the right of the player modes. Click this icon to open a pop-up window with jump-in points. These points allow you to start a topic at a point other than at the beginning, which is helpful if you need to review a portion of a task.

Concept Pane
The concept pane, which is found at the beginning of the module, lessons, and topics, contains an overview of the particular module, lesson, and topic. Topic concept panes contain additional information about the topic.

Introduction Pane
Each topic's Introduction pane displays a list of the topic's objectives.

Exiting the Player
If you need to return to the outline view before the topic's playback concludes, press the ESC key to terminate the player.

At the conclusion of the topic, the UPK Player window will close automatically and return you to the outline. You can then select another topic from the outline or close the window containing the UPK page.

Topics
This module contains the following topic:

• Navigating in Student Financials

Sandbox
The Student Financials training sandbox is available for you to practice what you have learned. To access the sandbox, navigate to https://he90dev.net.ucf.edu/psp/HE90TRN/?cmd=login. When the **Oracle PeopleSoft Enterprise** page opens, you will log in just as you log into the myUCF portal. Enter your PID in the **User ID** field and your PID password in the **Password** field.

Lookup Icon
Whenever you see a lookup icon (represented by a small magnifying glass) next to a field, you can click the icon. You can then select a value from the list of available values that displays.

Menu
You can collapse or expand the menu on the left side of the page while you are using the sandbox.

• To collapse the menu, click the **Minimize Menu** icon (represented by a minus symbol) in the upper right section of the menu bar.

• To expand the menu, click the **Expand Menu** icon in the upper left area of the page.
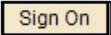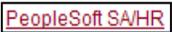
ORACLE
User Productivity Kit

Navigating in Student Financials

This topic will show you how to navigate in Student Financials as well as acquaint you with the Student Financials menu and page titles and the terminology used in Student Financials.
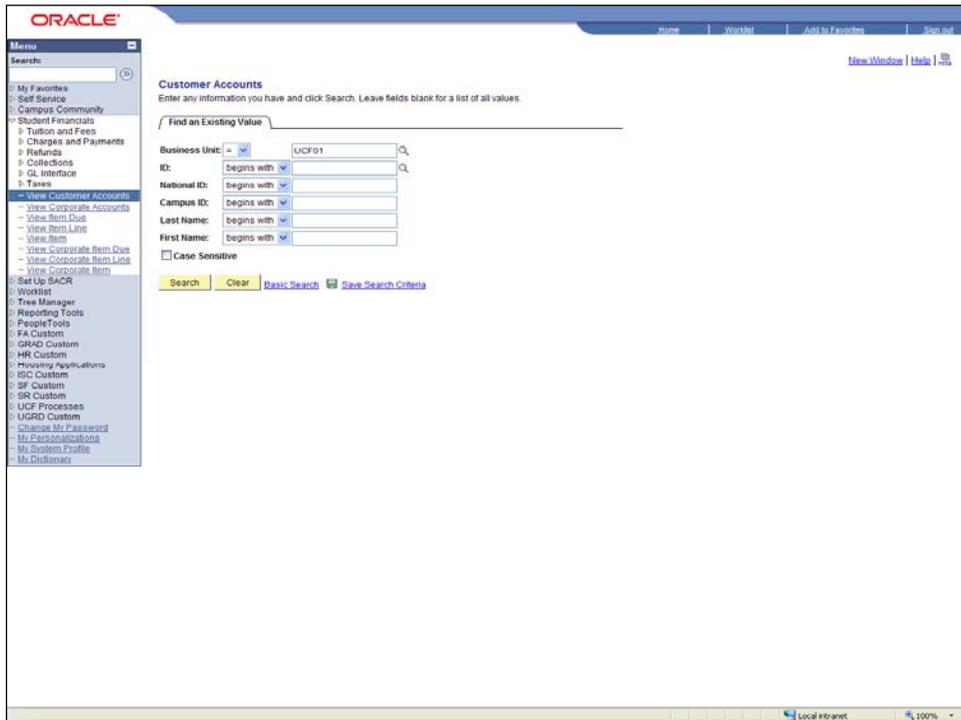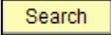
Procedure

In this topic, you will learn how to:

• Navigate in Student Financials.

• Understand basic navigation terminology.

• Expand and collapse the menu.

• Use the **Home** link.

Step	Action
1.	You will begin this lesson by learning how to log into Student Financials from the myUCF portal.
2.	Use your Internet browser to open the **myUCF** portal page (https://my.ucf.edu). Next, locate the **Signon** section in the upper left area of the page.
3.	Then, enter your **PID** and **PID Password** in the **Signon** section, and click the **Sign On** button. Sign On
4.	Notice the submenus on **myUCF Menu** that displays are collapsed so only the main menu is visible. Triangles indicate menus. Clicking a menu item will open up other menus and links. Links to pages are preceded by a dash (—) and are underlined. Links may appear under a menu item as well as on the home page. Click the **Staff Applications** link.
5.	Click the **PeopleSoft SA/HR** link. PeopleSoft SA/HR

Step	Action
6.	Student Financials primarily uses two links from the menu that displays, **Campus Community** and **Student Financials**. The **Campus Community** link is used to access Service Indicators, which are discussed in a separate topic. Click the **Student Financials** link. Campus Community Student Financials
7.	Navigation in Student Financials takes place through menus and links (on the left side of the page) and through folders and page icons (on the right side of the page). Either method or a combination of the two can be used to navigate in Student Financials. The folders and page icons on the right side of the page are often referred to as a navigation collection. This collection allows you to view multiple levels of menu options on a single screen as well as provides you with a brief description of each path option. The terms "menu" and "folder" are interchangeable. The terms "link" and "page" usually refer to both the page and the navigation to the page.
8.	Many link titles include terms that identify the type of task to be performed, such as "View Customer Accounts." Sometimes page names, such as "Inquire," "Use," "Report," and "Process," will take the place of navigation menus. Click the **View Customer Accounts** link. View Customer Accounts

Step	Action
9.	When you have fully expanded a menu item, such as the one in this example, a search page will display. You will use the search page to enter your search criteria in the search fields and then press the **Search** button to display a page with the information you requested. For this example, enter **1234567** in the **ID** field.
10.	Click the **Search** button. ![Search]
11.	In this example, the **Customer Accounts** page displays. Use this page to view the information you requested. Notice the main menu on the left side of the page. Throughout your navigation in Student Financials, this menu will always remain docked. In addition, the main menu will display your path history in white so you can easily retrace your steps to and from your current location.
12.	To collapse the main menu so you can more easily view the data on a page, click the **Collapse Menu** icon. ![Collapse icon]

Step	Action
13.	The main menu will collapse. To expand the collapsed menu, click the **Show Menu** icon.
14.	Notice the **Home** link near the top of the page. This link can be accessed from any page in Student Financials. Clicking this link will immediately return you to the home page and display the main menu. Click the **Home** link.
15.	From the home page that displays, you can either click another menu link or click the **Sign out** link to terminate your current session.
16.	In this topic, you learned how to: • Navigate in Student Financials. • Understand basic navigation terminology. • Expand and collapse the menu. • Use the **Home** link. **End of Procedure.**