Financial Aid
Lunch & Learn
May 15
12pm-1pm

• For listening ease, please mute your microphone/phone.
• This will be recorded and uploaded to our Training & Documentation page after the presentation along with the slides.

Click here for phone number and passcode if you’d like to join by phone.

Mute microphone and disable camera

Open chat or view other participants
CS 9.2 and Financial Aid

Presenter
Crystal Tangsrud
Financial Aid Business Analyst
Housekeeping

• This presentation is being recorded.
• The slides and recording will be available on our Training & Documentation page by the end of the week.
• Please ask questions in the chat window throughout.
• For listening quality we will be muting all microphones.
Disclaimer

We are currently in the midst of the upgrade process and any screenshots, images, or demonstrations we go through today are from our testing environments. There may be changes in the final version that is deployed when we go-live. Please refer to our Training & Documentation page for all of our most current documentation.
Agenda

- Introduction to 9.2
- Common Verbiage
- Navigating & Financial Aid
  - Basics
  - Homepage
    - Campus Solutions Administrator
    - Personalizing Homepages
    - Optional FA Tiles
- Students Experience & Financial Aid in 9.2
- Questions
- Resources
Introduction to 9.2
What is 9.2?

• This is a technical upgrade from Campus Solutions version 9.0 to 9.2.
• 9.2 contains enhanced mobile functionality.
• Primarily look/feel upgrade, very little functionality changes.
Why are we upgrading to 9.2?

- Some additional features
- Enhanced Mobile Functionality
- Oracle Support for Campus Solutions 9.0 ends in December 2019
- We upgraded to 9.0 in June of 2008. 11 years ago!

It's like cell phone technology. Everything changes!
When are we upgrading to 9.2?

**Planned Outage for Upgrade**

Friday, July 12 at 5 PM  
until  
Monday, July 15 at Noon

There is an alternate/back up date scheduled for the weekend of July 26th should the project not meet critical benchmarks and need to be pushed back.
Common Verbiage
Common Verbiage

• **Classic**: Your current navigation and style in 9.0
• **Fluid**: Dynamic pages that adjust based on screen size. Desirable for mobile devices.

Common Verbiage

- **Tiles**: A navigation icon found on a Homepage. Can be a direct link to a page or collection of pages.
- **Page Tiles**: A Tile that is tied to a single page.

Common Verbiage

• **Navigation Collection or NavCollection**: A collection of pages, grouped together for easy navigation. NavCollections are usually associated with Tiles, but Tiles don’t always have NavCollections. Created/maintained by CTS.

Common Verbiage

• **Favorites**: A collection of pages you refer back to often and want easy access to.

• **Navigation Bar or NavBar**: A control panel that provides quick access to pages and folders in CS.

Common Verbiage

• **Homepage**: A collection of Tiles for easy navigation. There are both delivered and personal/customizable Homepages.

• **PUM**: Acronym for PeopleSoft Update Manager. This replaces “Bundles” in 9.2. PUMs allow for a high degree of flexibility in installation.

• **Self Service**: A menu or collection of pages used by the student to complete tasks in Campus Solutions. The Student Center is located in Self Service.

Common Verbiage

- **Student Center or Student Services Center**: The student’s primary method of completing tasks in Campus Solutions 9.0. This is available in 9.2 but no longer the primary method of activity for students.

Navigating & Financial Aid
Basics
Navigating with Favorites in 9.2

• Your favorites will still be available in 9.2!!
• Current Production Favorites will be copied to the new 9.2 Production.
  • Go through and clean-up ahead of time!

Navigating with the Navigator

- This is the same idea as clicking “Main Menu” in 9.0
- Menu Structure remains the same.

Navigating with Search

View Search Results
22 results for keyword: "query"

- Queries
  Select query and target language for query translation.
  Application: NDCSDEV

- Query Manager
  Create or update queries and query specifications.
  Application: NDCSDEV

- Query Viewer
  Review existing queries.
  Application: NDCSDEV

- Connected Query Definitions
  Translate Connected Query Definitions
  Application: NDCSDEV
Navigating with Classic Home

• If you prefer the Classic version of Campus Solutions you can use Classic Home
• Not mobile friendly or Fluid!
• While available now, Oracle does not plan to continue maintaining this view for long.
Homepages
Navigating with Homepages in 9.2

• Favorites on steroids or shared favorites
• Delivered Homepages:
  • Campus Solutions Administrator Homepage
  • Faculty/Advisor Homepage
  • Student Homepage
• Homepages are based on roles.
  • Security applies! You won’t be able to access content from a Tile that you can’t get to any other way.
• Able to create/personalize your own Homepage
  • Add Public Tiles (with NavCollections)
  • Add Page Tiles

Campus Solutions Administrator Homepage
CS Administrator Financial Aid Tile

Awarding
Budgeting
Campus Community
Customer Service
ISIR
Maintain Student FA Term
View Packaging Status Summary

Award Entry
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

- Empl ID begins with
- Academic Institution = UND01
- Aid Year =
- National ID begins with
- Campus ID begins with
- Last Name begins with
- First Name begins with

Search Clear Basic Search Save Search Criteria
CS Administrator Financial Aid Tile
CS Administrator Financial Aid Tile

- **Awarding**
  - Assign Awards to a Student
  - Disburse Aid
  - View Award Activity

- **Budgeting**
  - Create Student Budget
  - Maintain Term Budgets

- **Campus Community**
  - Checklist Management – Person
  - Communication Generation
  - Communication Management
  - Manage Service Indicators
  - Search/Match

- **Customer Service**
  - Add/Update a Person
  - Enrollment Summary
  - Request Transcript Report
  - Student Services Ctr (Student)
  - View Customer Accounts
  - View Financial Aid Status

- **ISIR**
  - 20xx-20xx Correct ISIR Records
  - 20xx-20xx Suspense Management

- **Maintain Student FA Term**
- **View Packaging Status Summary**
Personal Homepages

Crystal's Homepage

- Financial Aid
- Verification
- Budgeting & Packaging
- Document Imaging - Linking

Loans
- Personalize Homepage
- My Preferences
- Help
- Sign Out
Personalizing Homepages

• Click “three dot” icon
• Click Personalize Homepage
  • Add Personal Homepage
  • Add, delete, or move Tiles

You’re able to rearrange delivered Homepages and add Tiles, but you cannot delete delivered Tiles.

Optional Financial Aid Tiles

• **Budgeting & Packaging**
  Designed for those who do budgeting, packaging, and award letters.

• **Loans**
  • Includes frequently used Direct Loan and Alternative/Commonline Loan processing pages. Optimal for those who work with those who run these processes regularly.

• **Verification**
  • This NavCollection was designed by the Verification Working Group and includes frequently accessed pages by Verification Professionals.

• **More to come!**

All optional FA Tiles are limited to the NDUS Financial Aid Director with and without setup roles.
Personalizing Homepages Demo
Students Experience & Financial Aid in 9.2
9.0 Student Center

- Primary methods of completing tasks were using the Student Center and Self Service Menus
- Not mobile friendly
- Still available in 9.2
- Student Services Center (Admin View) available
9.2 Student Homepage

- The Student Experience in 9.2 is designed to be mobile friendly, or Fluid.
- More intuitive and in-line with other mobile activities.
- No features “turned off” like they were in HighPoint
- Oracle continues to develop more mobile friendly pages. However, some existing pages may still appear as they do on a desktop
Student Homepage
Financial Aid Tile
Desktop vs Mobile

Desktop:

![Desktop screenshot]

Mobile:

![Mobile screenshot]
Desktop vs Mobile

Student Homepage: Financial Aid Tile

In Campus Solutions 9.2 the Student’s Experience provides mobile application that scales to the size of the device it is being viewed on, which is known as Fluid capability. Tiles on the Student Homepage are more in line with other mobile activities we all complete on a daily basis. With the introduction of Fluid capability, we will no longer have to rely on High Point, where some features were disabled, as they did not integrate well with Campus Solutions, like a student’s ability to accept or decline financial aid awards. Students will now be able to complete all functions they can do on a desktop on their phone. No features are disabled.

Because of this Oracle reformatted the Financial Aid pages for students to be easier to use on a mobile device. This results in different page names for a student on a phone than they will find on their desktop. This document outlines the differences and purposes of each of the pages on both a Desktop and Mobile Device on the Financial Aid Tile found on the Student Homepage.

Contents

Student Homepage: Financial Aid Tile ........................................................................................................................................1
Desktop ..................................................................................................................................................................................1
Awards ..................................................................................................................................................................................1
Financial Aid Summary ..........................................................................................................................................................5
Mobile ..................................................................................................................................................................................7
Side by Side ...........................................................................................................................................................................11
Desktop Financial Aid Tile

Includes:
• Award Summary
• Accept/Decline Awards
• Disbursements
• Report Outside Aid
• Shopping Sheet
• Financial Aid Summary
  • Need Summary, COA, and EFC
Award Summary (Desktop)

• Displays all awards, their type and status, total award amount, and disbursed amount.
• Display only.
• It also includes a link to their Account Balance.
Award Summary (Desktop)

• If they click on an award they can get:
  • General Award information (Award Messages)
  • Amounts
  • Loan Information.
Accept/Decline (Desktop)

- Accept or decline outstanding offers by clicking on the pencil icon.
- If they click on an award they can get:
  - General Award information (Award Messages)
  - Amounts
  - Loan Information.
- They are presented with the Title IV Authorization message. And when they submit the change the Award Load Message displays.
Disbursements (Desktop)

- This page displays disbursement information by term.
- This displays:
  - Award Amounts
  - Applicable Fees
  - Net Award Amount
  - Disbursed Amount.
- It also includes a link to their Account balance.
Report Outside Aid (Desktop)

• This page replaces the External Award Reporting in Student Center where students can report aid to the Financial Aid Office.
Shopping Sheet (Desktop)

- Student can navigate to this page to view their Shopping Sheet (College Financing Plan).
- Pops up in a different window/tab depending on their browser settings.
  - Pop up blockers may need to be disabled.
Need Summary (Desktop)

- The Need Summary page shows the need formula including the students:
  - Cost of Attendance
  - Expected Family Contribution
  - Need
  - Remaining Need
Cost of Attendance (Desktop)

- This page displays the students Cost of Attendance (COA).
- View for the academic year or by term.
Expected Family Contribution (Desktop)

- Breaks down their contributions by award period.
- Displays the contribution from parent and student.
Mobile Financial Aid Tile

Includes:
• Outstanding Offers
• Manage Accepted Awards
• Award Summary
• Shopping Sheet
• Disbursements
• Outside Aid

*In development: mobile friendly Financial Aid Summary page. Available this fall.*
Outstanding Offers (Mobile)

- This page displays the current awards the student has that are still in offered status.
- By clicking on an award they can accept/decline an award.
- They are also presented with the Title IV Authorization message. And when they submit the change the Award Load Message displays.
Manage Accepted Awards (Mobile)

• View all of their accepted awards.
• If they click on an award they can get:
  • General Award information (Award Messages)
  • Amounts
  • Loan Information.
• They can also reduce an accepted, non-originated, award on this page.
Award Summary (Mobile)

• Displays:
  • All awards
  • Award Type
  • Award Status
  • Total award amount
  • Disbursed amount.

• This page is display only.

• If they click on an award they can get:
  • General Award information (Award Messages)
  • Amounts
  • Loan Information.

• It also includes a link to their Account Balance.
Shopping Sheet (Mobile)

- View their Shopping Sheet (College Financing Plan).
- When they click the button it pops up in a different window/tab depending on their browser settings.
  - Pop up blockers may need to be disabled.
Disbursements (Mobile)

- This page displays disbursement information by term.
- This displays:
  - Award Amounts
  - Applicable Fees
  - Net award amount
  - Disbursed amount.
- It also includes a link to their Account balance.
Outside Aid (Mobile)

- This page replaces the External Award Reporting in Student Center where students can report aid to the Financial Aid Office.

![Financial Aid interface](image)

- 2018-2019
- University of North Dakota

**Outside Aid**
There are no awards to display

- Report Outside Aid

Report aid that you expect to receive from outside sources such as private entities or state and local agencies.
Side-by-Side

Desktop

Mobile

Indicates not available on other device
Accepting/Declining Awards (Desktop)

Below is a screenshot of the Accept/Decline section of the Financial Aid Portal for the University of North Dakota for the 2018-2019 academic year. The portal allows students to accept or decline various types of financial aid.

<table>
<thead>
<tr>
<th>Award Description/Category</th>
<th>Award Decision</th>
<th>Reduce</th>
<th>Offered</th>
<th>Accepted</th>
</tr>
</thead>
<tbody>
<tr>
<td>3rd Party Billing Misc</td>
<td>Accept</td>
<td></td>
<td>3,500.00</td>
<td>3,500.00</td>
</tr>
<tr>
<td>Bursary</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Pell Grant OY</td>
<td>Accept</td>
<td></td>
<td>3,048.00</td>
<td>3,048.00</td>
</tr>
<tr>
<td>Grant</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Direct Loan Sub OY</td>
<td>Select</td>
<td></td>
<td>5,500.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Loan</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Direct Loan Unsub OY</td>
<td>Select</td>
<td></td>
<td>7,000.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Loan</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Totals: 19,048.00 6,548.00

Currency used is US Dollar

You may accept or decline any or all of the awards that are currently available. Remember to "Submit" your changes if you make further adjustments. Otherwise, check back periodically for updates to your financial aid package.
Accepting/Declining Awards (Mobile)
Wrapping Up

- Modern Look and Feel
- Many ways to navigate, allowing for a highly customizable experience.
- Staff with Stage access are encouraged to test and grab screenshots for campus communications and websites. (Available May 13)
Resources

• Campus Solutions 9.2 Upgrade Page
  • Timeline
  • Videos

• Campus Solutions Training & Documentation Page
  • Job Aids  http://cts.ndus.edu/sits-departments/connectnd/campus-solutions/training-documentation/

• Campus Solution Blue Page
  • Updated links to environments  https://webapps.ndus.edu/systems/campus-solutions-links.php
Questions?