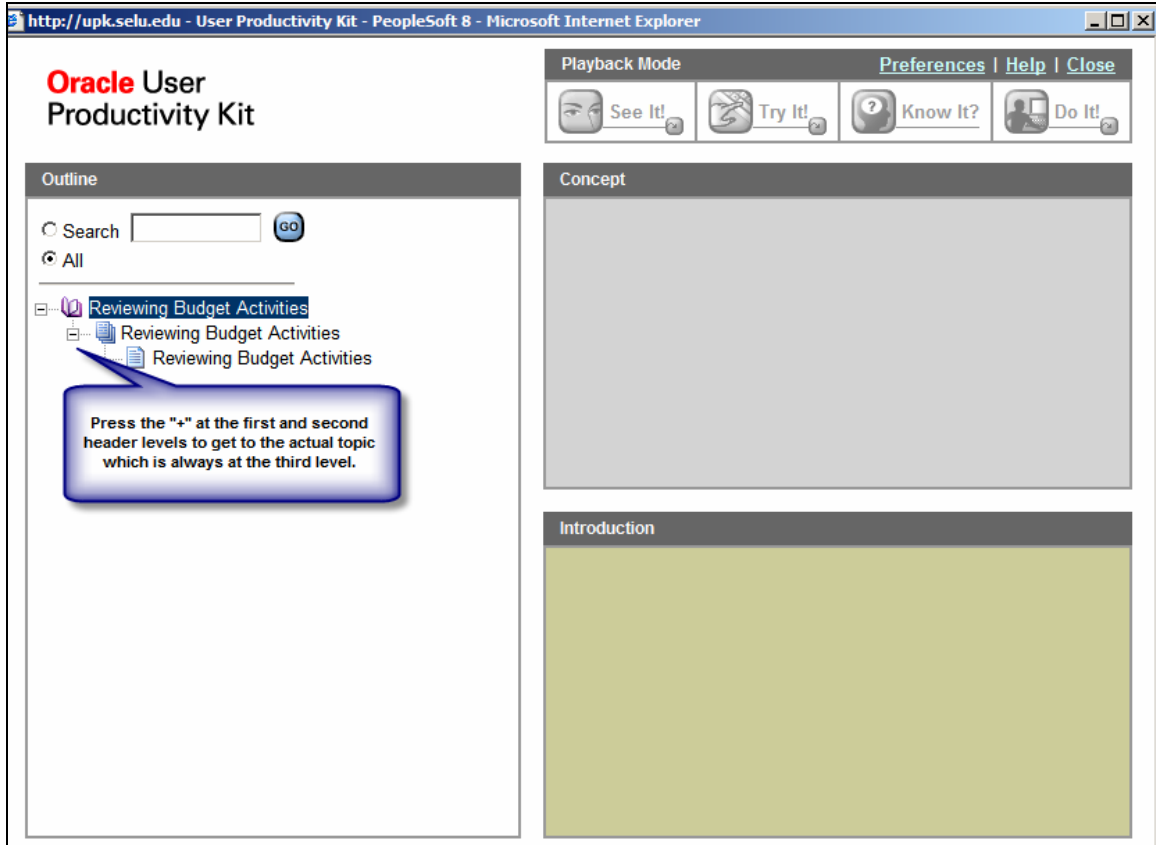


Some Tips for Using this Training Tool (Known as UPK)

When the screen opens, you will see a topic heading on the left side of the screen. To use one of the training topics, you must expand the list to the lowest level, so press the "+" next to the headings to get to the lowest (3rd) level:



Oracle User Productivity Kit

Playback Mode Preferences | Help | Close

See It! Try It! Know It? Do It!

Outline

Search GO

All

Reviewing Budget Activities

Reviewing Budget Activities

Reviewing Budget Activities

Press the "+" at the first and second header levels to get to the actual topic which is always at the third level.

Concept

Introduction

Click on the Topic description and the remaining screen options will be accessible. On the Concept section of the screen, a "Job Aid" link will be available. This is a printable step-by-step guide to the topic. If you would like, print this as an additional training tool.



There are 4 Playback Mode buttons at the top of the screen:



In "See It!" mode, you observe only. You can watch the process at the preset speed or you can increase the speed by pressing enter.

In "Try It!" mode, you will be prompted to enter data into fields.

In "Know It?" mode you are testing your knowledge by going through the entry process with few prompts. This is the mode used for our "Entering a Requisition" assessment.

When you complete the "Know It?" mode assessment, you will be prompted to print a certificate.

Note that in "Know It?" mode, note that you can move the text box on the screen.

The screenshot shows the 'Budget Inquiry Criteria Budget Overview' interface. A yellow 'Know It?' pop-up window is centered on the screen, containing the text: 'Enter the desired information into the Description field. Enter a valid value e.g. "BUDGET OVERVIEW".' Below the text are buttons for 'Typing Complete' and 'Show Step'. A blue callout box at the top right of the pop-up says: 'You can move the text box by clicking and holding the blue bar, and moving it to another location.' The background interface includes a search bar with 'BUDGETY' in the 'Inquiry' field and a 'Description' field. Below this are sections for 'Amount Criteria', 'Budget Type', and 'TimeSpan'. The 'Budget Type' section has fields for '*Business Unit' (SLULA) and 'Ledger Group/Set' (Ledger Group), with checkboxes for 'View Stat Code Budgets' and 'Display Chart'. The 'TimeSpan' section has a '*Type of Calendar' dropdown set to 'Detail Budget Period'. Below these is a table with columns: 'Select', 'Ledger Group', 'Calendar ID', 'From Budget Period', 'To Budget Period', 'Include Adjustment Period(s)', and 'Include Closing Adjustments'. The first row has a checked 'Select' box, 'CC_BUDUNIT' in the 'Ledger Group' column, and checked boxes in the 'Include Adjustment Period(s)' and 'Include Closing Adjustments' columns. Below the table is a 'ChartField Criteria' section with columns for 'ChartField', 'ChartField From Value', 'ChartField To', 'ChartField Value Set', and 'Update/Add'. The 'ChartField' column contains a '%' symbol. To the right is a 'Budget Status' section with checkboxes for 'Open', 'Closed', and 'Hold', all of which are checked. At the bottom of the screen are buttons for 'Save', 'Notify', 'Refresh', 'Add', and 'Update/Display'.

"Do It!" mode is available only from within PeopleSoft financials. The tool will provide prompts during actual use of the PeopleSoft system.

To move to a previous screen or choose other navigation options, click on "Actions" in the UPK text box.

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Home | Add to Favorites | Sign out

New Window | Help | Customize Page

Budget Inquiry Criteria
Budget Overview

Inquiry: BUDGETY Description:

Amount Criteria Search Clear Reset

Budget Type

*Business Unit: SLULA Ledger Group/Set: Ledger Group Ledger Gro

View Stat Code Budgets
 Display Chart

Time Span

*Type of Calendar: Detail Budget Period

Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Period(s)	Include Closing Adjustments
<input checked="" type="checkbox"/>	CC_BUDUNIT				<input checked="" type="checkbox"/>	<input type="checkbox"/>

ChartField Criteria

ChartField	ChartField From Value	ChartField To	ChartField Value Set	Update/Add
	%	%		Update/Add

Budget Status

- Open
- Closed
- Hold

Try It! Actions

Enter the desired in into the Description

Enter "BUDGET OV

Typin

- Next Step
- Previous Step
- Restart Playback
- Display Concept
- Preferences
- Help
- Close Topic

Click on "Actions" to go to the Previous Step, Restart, Close the Topic, etc.

Save Notify Refresh Add Update/Dis