Promotional Scholarship Training Guide
(Undergraduate Scholarship Search)

Included in this document are the detailed steps required for colleges and departments to promote scholarship opportunities to students in the "Undergraduate Scholarship Search" tool.

The Promotional Scholarship data set entered into PeopleSoft supports the "Undergraduate Scholarship Search" web tool used to advertise institutional scholarship opportunities to current University of Minnesota students. The search tool uses a standard set of search criteria to identify a subset of scholarships for which an individual student may be eligible and links students to specific information that allows them to make informed decisions about a scholarship opportunity.

This document includes training on:
- Access to UM Promotional Scholarships in PeopleSoft
- Entering New Promotional Scholarship Item Types
- Entering Promotional Scholarship Descriptions
- Entering Scholarship Demographic and Academic Criteria Sets
- Guidelines for Promoting Scholarships in the Undergraduate Scholarship Search Tool

For questions, or to schedule in-person training, please contact the Office of Student Finance Scholarship Unit.
- Scholarship Unit Email: saosf@umn.edu
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Getting Started:

Access to UM Promotional Scholarships in PeopleSoft:
The *UM Promotional Scholarships* component in PeopleSoft requires a separate access request.
1. Visit OIT Data Security's web page: https://it.umn.edu/service-details/enterprise-access-requests and fill out an "Access Request Form" (ARF) for "Promotional Scholarship" by navigating to *CS Student Systems and Data > CS Applications > Promotional Scholarship*.
2. Complete and submit the form to OIT Data Provisioning.
3. After access is granted **- Log into PeopleSoft Systems 'Campus Solutions'** through the **MyU Portal:** Sign in to the MyU Portal and click on 'PeopleSoft' under the 'Key Links' menu. Then click on the 'Campus Solutions' link under the 'PeopleSoft Systems' heading.
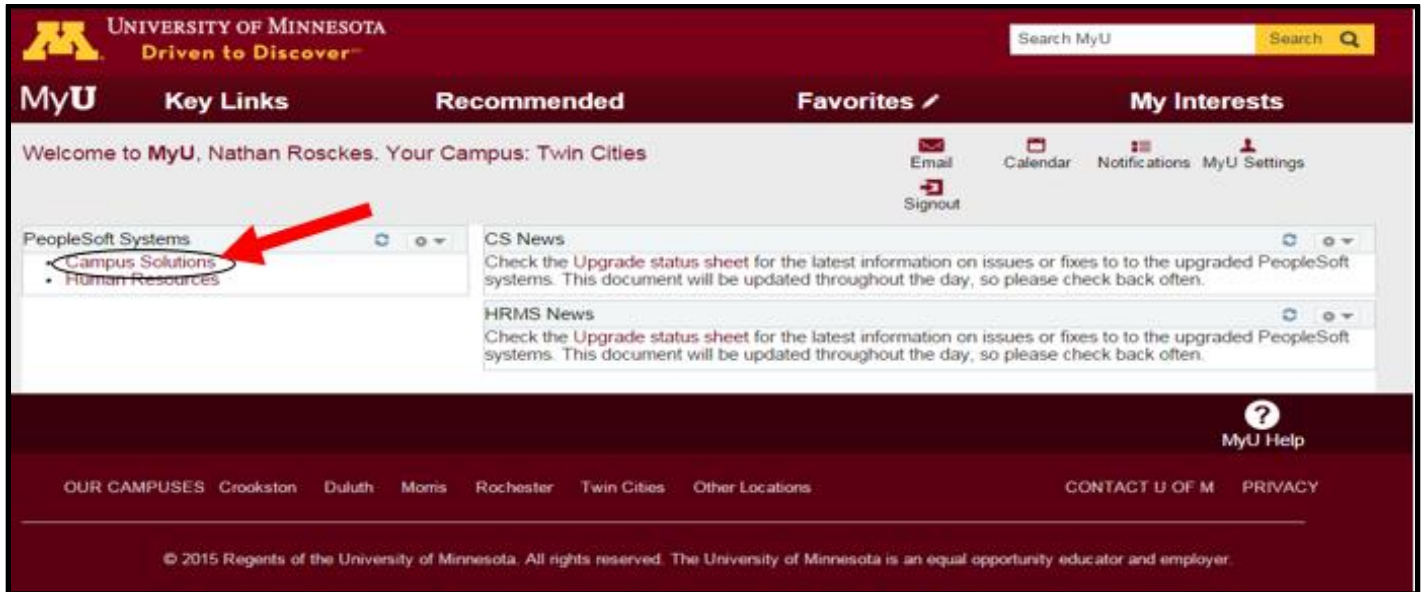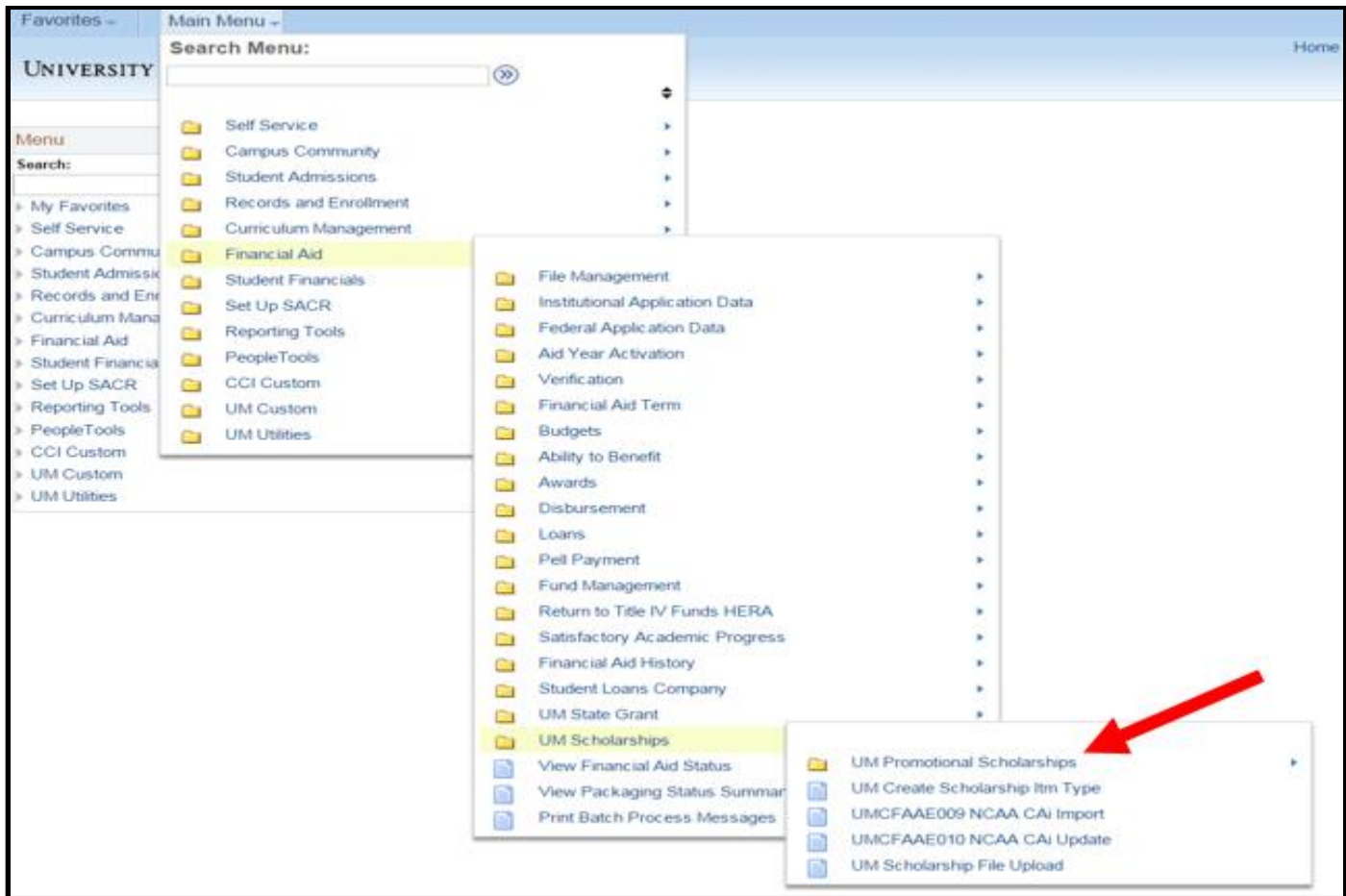

4. You will now be at the main menu page of PeopleSoft CSPRD. Your options may differ from what is shown here, depending on your training and access.
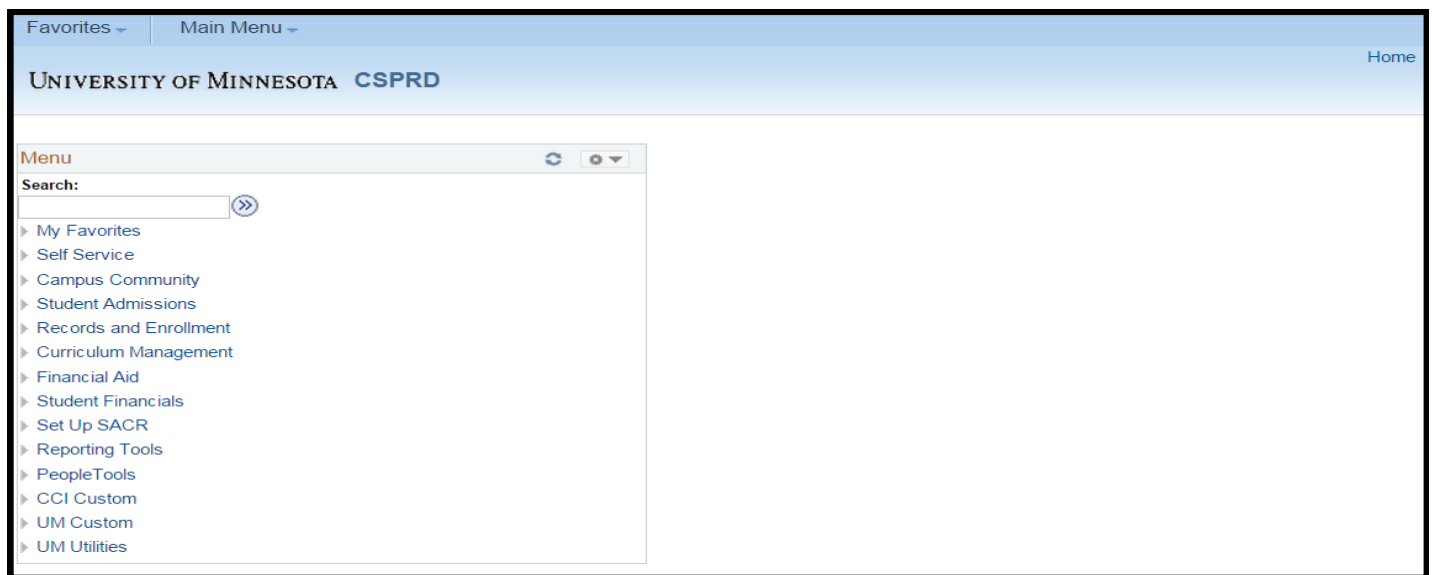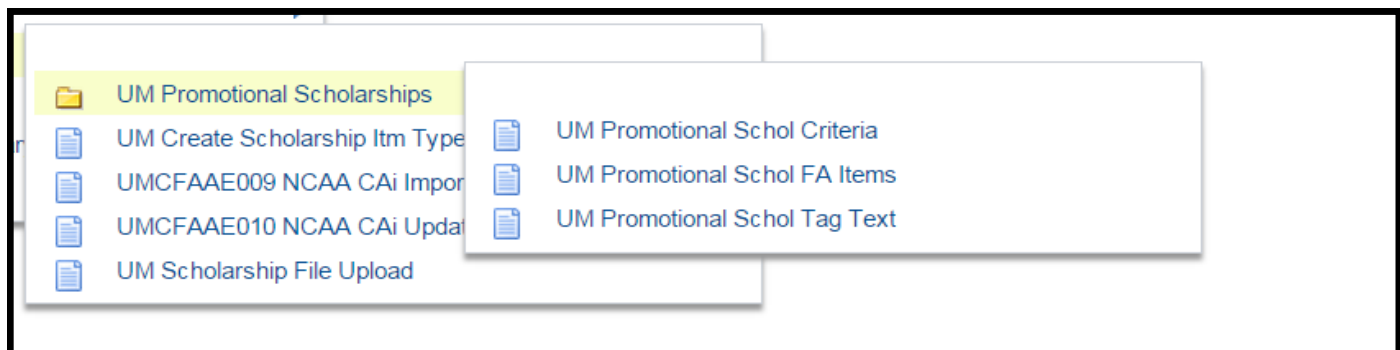
Process to Begin Setting Up Your Scholarships

UM Promotional Scholarships:
Home > Financial Aid > UM Scholarships > UM Promotional Scholarships

The UM Promotional Scholarships component is divided into three main file folders, the 'UM Promotional Schol Criteria' folder, the 'UM Promotional Schol FA Items' folder, and the 'UM Promotional Schol Tag Text' folder.

Select the Folder you wish to use. *Note:* Most scholarship administrators will not have access to the 'UM Promotional Schol Tag Text' folder as that is where the tags themselves are edited (only OSF staff).

Entering New Promotional Scholarship Item Types:
Home > Financial Aid > UM Scholarships > UM Promotional Scholarships > UM Promotional Schol FA Items

1. To add new Promotional Scholarships and/or edit Promotional Scholarship descriptions, click into the 'UM Promotional Schol FA Items' page.
2. You will see a search interface (below).

Decide which of these tasks you want to complete:

A. Find promotional scholarships already entered in the database: Enter your Academic Institution (UMNTC), then hit "Search." The results should yield all the scholarships you have security access to see (based on your Dept ID). You can also search by an exact Item Type number, Title (name) of the scholarship, etc. *Note:* Your scholarships should be reviewed on occasion for any updates that may be needed.

B. Enter a Promotional Scholarship with an existing Item Type that you have not yet entered into the Promotional Scholarship system: Click the "Add a New Value" tab.

Note: If you have a new scholarship, you will need to have a new Item Type created before you can enter the scholarship in "UM Promotional Schol FA Items." To create a new Item Type use the "UM Create Scholarship Itm Type" page in PeopleSoft. Once the item type is created, proceed to "B" above.

Contact the Scholarship Unit in OSF at saosf@umn.edu with questions on Item Type creation and/or Scholarship Automation.

3. The UM Promo Scholarship Descriptn screen: This screen will appear when you add a new value (step 2B, above), or when you select the promotional scholarship you would like to edit from the list returned by your search (step 2A, above).

Fill in the following fields to describe the Promotional Scholarship (Required fields are marked with *).

Effective Date*: The date this scholarship data will be available for the search engine or for reporting. You must enter an effective date for each new row. You can enter the current date for immediate changes or a date in the future, if you want your Promotional Scholarship details to change on a particular date.

Status*: The status is Active or Inactive:
• Active Promotional Scholarships are able to be promoted by the University colleges or departmental units. Scholarships should be kept Active if they are currently being used or there is a chance they will be used again in the future.
• Inactive Promotional Scholarships are not currently in use and do not officially exist. Inactive Promotional Scholarships will not show up in the Undergraduate Scholarship Search.

Public/Private*:
• Promotional Scholarships marked "Public" can be advertised to students and advisors. If a Promotional Scholarship is marked "Public" and "Active", it will be displayed by ASR's Promotional Scholarship search engine (Undergraduate Scholarship Search) to students who match the scholarship's criteria.
• Promotional Scholarships marked "Private" will not be displayed as a search result by ASR's Promotional Scholarship search engine (Undergraduate Scholarship Search).

Title*: Name of the scholarship. Limited to 255 characters.

Short Title: Optional field (will not display to students)

Criteria Code*: This will link the scholarship description with the "UM Promotional Schol Criteria," or the eligibility and awarding criteria that you enter.

Contact Email*: This is preferably a role-based alias address so that it does not need to be adjusted with staffing changes. This may be published along with a "details view" of the search results for this scholarship.

Contact Phone: This could be your main student services phone number. This will not be published; it will be used for intra-University communication.

Brief search results description*: Max 255 characters. This is the short description that will display to students in their search results. This is the primary way for you to communicate details about the scholarship that are not included in the eligibility criteria.

Long Public Description: This description can be exported to your Web page via RSS or xml output. This is unlimited in length, but is not displayed in the initial search results automatically. Users have to click a "Show details" link in search results to see the Long Public Description.
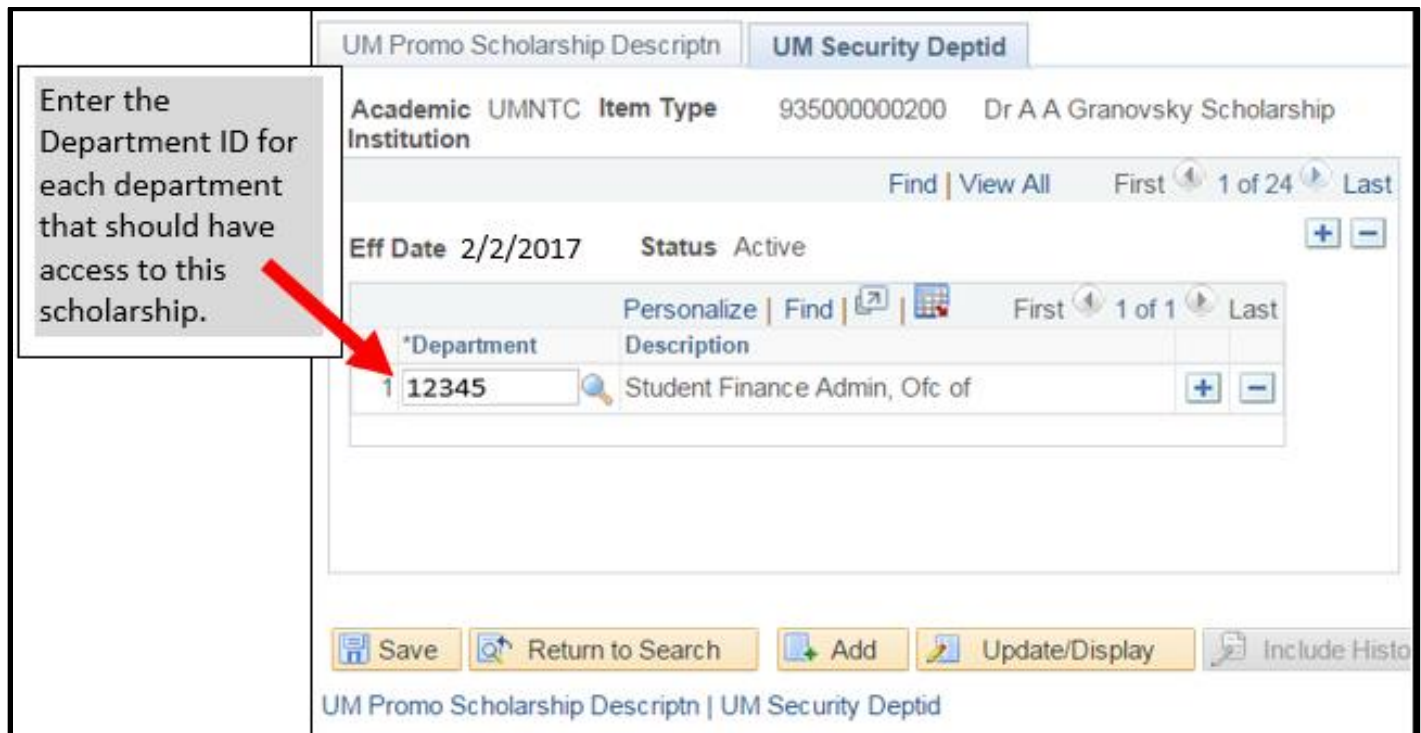
Application information URL: This is an essential field for all scholarships marked "Public." Students will follow this link from their search results to your designated scholarship information or application page to discover how they should apply for your scholarship.

Donor information URL: This link could provide more information about the donor of this scholarship.

Internal description: Could include MOA or other text useful for scholarship administrators (but will not display to students).

4. UM Security Deptid Screen
This is used to assign access to a Promotional Scholarship to a particular department or group of departments (unit).

Note: "Ownership" of a Promotional Scholarship can rest with more than one unit. The primary owner unit is defined by the initial DeptID used when the Promotional Scholarship was entered in PeopleSoft. A user with access to that unit is able to add other DeptIDs to give access to other departments or units.

Entering Scholarship Demographic and Academic Criteria Sets:
Home > Financial Aid > UM Promotional Scholarships > UM Promotional Schol Criteria

To set up an UM Promotional School Criteria set:
1. Click on the "UM Promotional Schol Criteria" Page in the left navigation Menu
2. You will see a search interface (below). The next step is to **decide which of these two tasks you want to complete:**

A. Find an existing UM Promotional Schol Criteria set already entered in the database:
Enter your Academic Institution (UMNTC), and then click "Search." The results should yield all the UM Promotional Schol Criteria sets you have access to see. You can also search by an exact Criteria Code number, etc.

B. Enter a new UM Promotional Schol Criteria Set:
Click the "Add a New Value" tab. Enter the Academic Institution (UMNTC) and the Career. UM Promotional Schol Criteria sets are always associated with a Career.

3. UM Criteria Set-up Screen

Fill in the fields to describe the UM Promotional Schol Criteria (Required fields are marked with *).

Eff Date*: The effective date is the date the criteria were entered. Alternatively, if the "+" button is used to enter a future date; the effective date is when the revised criteria data will be made available to match with scholarship descriptions.

Status*: Active criteria are those that are in current use. Inactive criteria are those that you do not want to use currently.

Description*: This is a searchable description for this set of criteria. Many colleges or units may want to use a unit abbreviation or some sort of identifier to facilitate searching and sorting. In some cases, especially in smaller units, the criteria description will be the same as a single Promotional Scholarship description.

Category tags: "Associated Tags" are a way to allow students to sort scholarships within their search results. This is where you can associate your scholarship with a particular goal or student population, such as "Learning Abroad," "Students Who are Parents," or "Internships." **When a student sorts by a tag, only scholarships associated with that tag will appear on the screen.** When you search for a Criteria Tag, you will see this screen:

4. UM Demographic Criteria screen

Preferred gender: If this scholarship should be promoted toward a particular gender, mark it here.

Preferred age: If there is a minimum or maximum age for eligibility for this scholarship, enter the ages as integers here.

FAFSA Need-based: If this is a need-based scholarship, check here.

Preferred ethnicity: If this scholarship is being promoted toward a particular student population, you may enter that preference here. You must enter all the ethnicities to whom you wish to promote the scholarship. If you leave this field blank, ethnicity will not be used to match with a student profile.

Citizenship information: Use these fields if this scholarship requires citizenship of a particular Country.

    Country: Enter the country of required citizenship/residency.

    Citizenship status: You must identify the citizenship status you wish to impact with your criteria. The PS data fields for this are standard "Native, Naturalized, "Alien Resident", etc. You select the statuses you wish to match.

    Association: This drop down menu is the qualifier for the preceding field. In this case, it allows you to describe if the citizenship statuses you have selected are required, preferred, or not eligible for the scholarship. For instance, you might select Native, Naturalized, and Alien Permanent and list the Association as "Required."

Official/Additional Residency Data: Use these fields if this scholarship requires or prefers a specific "official residency status." These are the Admissions, Financial Aid, and Tuition Residency statuses. These statuses may differ for a single student, as admissions residency reflects residency status at the time of admission, while official and tuition residencies may change over time.

> **Official Residency:** These options are from existing PeopleSoft fields that reflect existing University processes. You may choose one at a time. If you need to associate it with more than one residency status, "add" a row by hitting the "+" button.
> **Residency:** This option list includes all the residence statuses (In-state, Out of state, Reciprocity, Distance Learning, etc.).
> **Association:** Association is the "logic" you use to qualify the status you have chosen.

Country / State of residence: If your scholarship requires a match to a particular country or state of residence, enter the country and state. These are matches to the student's permanent address in PeopleSoft.

> **Country:** Enter the country (type "USA" to avoid the long "Country" drop-down menu).
> **Association:** Association is the "logic" you use to qualify the status you have chosen.
> **State:** This dependent list differs per country.
> **Association:** Association is the "logic" you use to qualify the status you have chosen.
> **County:** You must type in the county name. Capitalize the first letter of the county and double-check your spelling! It must be an exact match to work.
> **Association:** Association is the "logic" you use to qualify the status you have chosen.
> **Postal Code:** If your scholarship requires residence in a particular town or city, you must enter a list of all the postal codes for that location. Use the "+" button to add additional Zip Codes.
> **Association:** Association is the "logic" you use to qualify the status you have chosen.

5. UM Academic Criteria screen

GPA: The minimum and preferred GPA for a scholarship. Only students who meet the minimum GPA will see this scholarship in their search. Preferred GPA affects the ranking in the search returns list.

Honors: Indicate whether Honors is not applicable, required, or preferred for this scholarship.

Credits: Credits will display with the description as a student's search result.
> **Minimum credits in progress**: Minimum number of credits required per semester for students to receive this scholarship.
> **Maximum credits in progress**: Maximum credits allowed per semester.

Class Standing: You may choose to enter the class standing for when this promotional scholarship actually pays. If it is a 4-year scholarship, use the "+" to add rows and enter all 4 class standings. It will display in the search results but will not be used to limit matches.

Academic program: Use this field to match the scholarship to students in a particular Academic Program.
> **Academic Program**: The Academic Program for the student is a collegiate unit or its equivalent within the University of Minnesota system.
> **Association**: Preferred, required, or ineligible.

Academic Plan / Sub-Plan: These fields limit a scholarship to match with students in particular majors, minors, or Sub-Plans.
> **Academic Plan:** Majors and minors. Use the "+" button to include multiple Plans.
> **Association**: Preferred, required, or ineligible
> **Academic Subplan:** Sub-Plans are attached to academic plans and include areas of emphasis, concentration, honors and more. Use the "+" button to add multiple Sub-Plans.
> **Association**: Preferred, required, or ineligible.

Student Group: Use this field to display scholarships to students within particular PeopleSoft Student Groups.
> **Student Group**: Student Groups are used to track student membership in various groups for reporting, fee calculation, or degree progress assessment (e.g., athletes, veterans, and Med Fellow Specialists), within an Academic Institution.
> **Association**: Preferred, required, or ineligible.

6. UM Security Deptid screen

"Ownership" of an UM Promotional Schol Criteria set can rest with more than one unit. A user with access to that unit is able to add other DeptIDs to give access to other departments or units.

a. Look up a Department – Use the looking glass next to the *Department section to perform a search

7. Contact:
If you have questions about the UM Promotional Scholarship database or the Undergraduate Scholarship Search, please contact the Office of Student Finance Scholarship Unit: saosf@umn.edu

Guidelines and Tips for Promoting Scholarships in the Undergraduate Scholarship Search Tool

Your Promotional Scholarship's title and brief description are the most important parts for the Undergraduate Scholarship Search. For students to find the right scholarships with this tool, and for you to receive qualified applicants, this text needs to be as effective as possible.

A link to the Undergraduate Scholarship Search is live on the One Stop Scholarships page at: http://onestop.umn.edu/finances/scholarships

What students see in the scholarship search may also promote your college and what it has to offer students.

Example of what student sees when logging in:

1. Scholarship Titles:
Use the title to convey essential meaning to the student
100 character max
Good Examples:
- "Learning Abroad Undergraduate Diversity Scholarship"
- "CEHD Undergraduate Service Fellowship"
- "Ethel Curry American Indian Scholarship"
- "Charles Lathrop Pack Awards in Forestry"

2. Scholarship Brief Descriptions
Use the description to attract your target applicant
This must be brief, 255 character maximum
- **Tell who the target is**
  - "For undergraduate CSE students majoring in Chemistry"
  - "For undergraduate students pursuing a professional degree in Architecture"
  - "For Marching Band members who demonstrate leadership"

- **Tell how much is awarded and how many are awarded**
  - ○ "7 awards of $1000 given annually"
  - ○ "3 $4000 scholarships"
  - ○ "Available every term, amounts based on your Learning Abroad plans"
- **Tell what is required**
  - ○ "Requires an essay"
  - ○ "Application includes portfolio review"
  - ○ "Must upload a current resume"

Example of how an entry will look in the search results:

The primary target of this brief description is the student. Ask yourself:
- "Can the intended applicant see themselves in this description?"
- "Does it provide the relevant content for a student to decide to look into this scholarship more?"

Remember, because this search matches only on PeopleSoft "UM Promotional Schol Criteria" that you link to your UM Promotional Schol FA Items," you need to mention anything not included in the "UM Promotional Schol Criteria" that is relevant to awarding the scholarship.

As you get used to seeing how the system works you will probably coordinate your brief search results description with the selected tags to provide a complete picture of a scholarship.
- *A "good" example:* "Offers $3000 per year over the final two years of the major to support excellent students in Bio-chemistry. Awardees exhibit John Smith's values of leadership with their peers and commitment to their studies. Preference to students from the Iron Range" *(Total Characters used – 251)*

3. Long Public Description: This unlimited text field to expand upon the Brief Description if you wish to provide additional information to the student.

4. Application information URL: This is the link to further information about this particular scholarship (generally directing students to your college/department scholarship website). For most scholarships, this page will provide a link to the Online Scholarship Application tool for students to apply or detailed information on how the scholarship is awarded. For other scholarships, it may not be a direct link to an application or instructions, but rather a link that provides a student with a "next step" for a specific scholarship. This is particularly the case for scholarships that may not be awarded based on an application.

5. Donor information URL: For units that wish to do more to recognize donors, this link will be provided as part of the "Scholarship Details" view of a search result. There may not be a good link for this, and some donors may not wish to have a link. Check with the stewardship officer in your unit for details.

6. Internal description: This is really the "comments" field. It is unlimited in length, and can include comments from all who have access to the scholarship. This field will not display in the search results.

For Questions: Contact the Office of Student Finance Scholarship Unit

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