

Scholarship Automation Training Guide

(Departmental Scholarship Processes)

Included in this document are the detailed steps required for colleges and departments to process scholarships for students using the Scholarship Automation process in PeopleSoft.

This document includes training on:

- Scholarship Entry Access in PeopleSoft
- Creating Scholarship Item types
- Creating Scholarship (.csv) Files for Upload
- Uploading Scholarship (.csv) Files
- Reporting Center
- Guidance for Adjusting or Adding Amounts to Existing Scholarships

For questions, or to schedule in-person training, please contact the Office of Student Finance Scholarship Unit.

- Scholarship Unit Email: saosf@umn.edu
- LuGail Hamel 612-624-6043
- Nate Rosckes 612-624-2324
- Michelle Curtis 612-626-6518



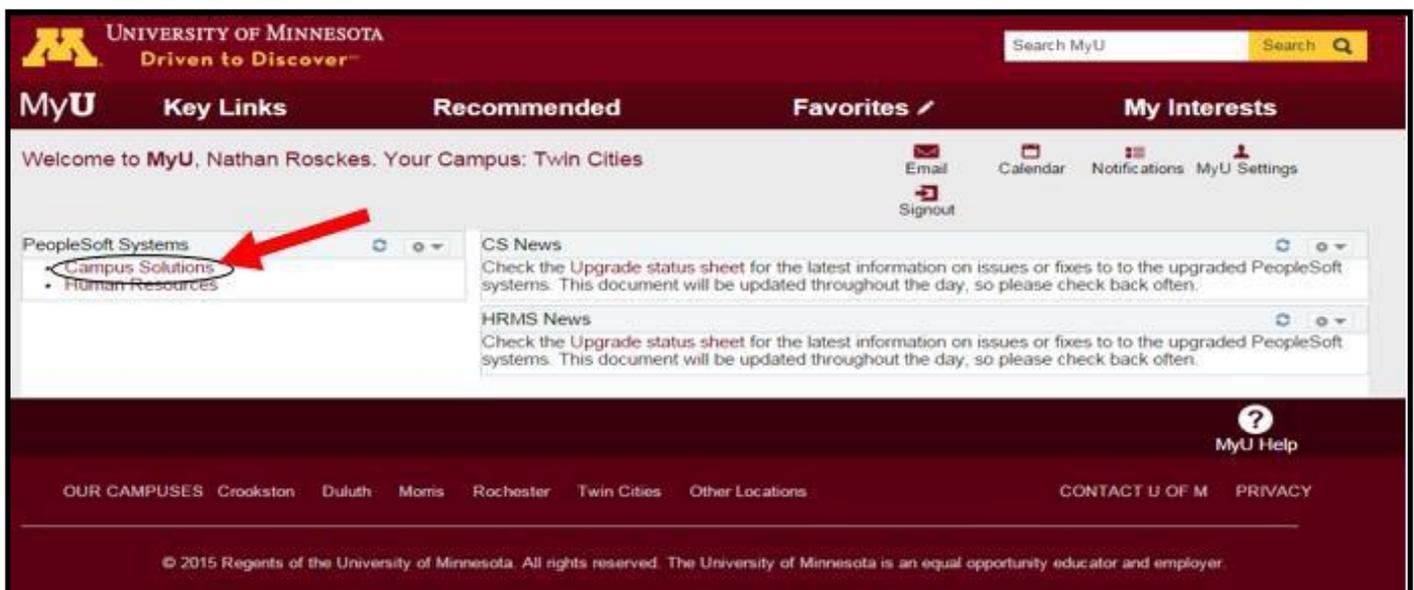
OFFICE of STUDENT FINANCE
Academic Support Resources

UNIVERSITY OF MINNESOTA

Getting Started:

Scholarship Entry Access in PeopleSoft: The *UM Scholarship File Upload* and *UM Create Scholarship Item Type* pages in PeopleSoft require Access Request Form (ARF). Dept ID security will be applied to the Item Type Create page. Role level security will be applied to both the Item Type Create and Scholarship Upload pages.

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 "Scholarship Entry" by navigating to *CS Student Systems and Data > CS Applications > Scholarship Entry*.
2. Complete and submit the ARF 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.



The screenshot displays the MyU Portal interface for Nathan Rosckes at the University of Minnesota. The top navigation bar includes the MyU logo, 'Key Links', 'Recommended', 'Favorites', and 'My Interests'. A search bar is located in the top right corner. Below the navigation bar, the user is greeted with 'Welcome to MyU, Nathan Rosckes. Your Campus: Twin Cities'. On the right side, there are icons for Email, Calendar, Notifications, MyU Settings, and Signout. The main content area is divided into two columns. The left column, titled 'PeopleSoft Systems', contains a link for 'Campus Solutions' which is circled in red and has a red arrow pointing to it, and a sub-link for 'Human Resources'. The right column contains 'CS News' and 'HRMS News' sections, each with a brief description and a refresh icon. At the bottom of the page, there is a footer with 'OUR CAMPUSES' (listing Crookston, Duluth, Morris, Rochester, Twin Cities, and Other Locations), 'CONTACT U OF M', 'PRIVACY', and a copyright notice for 2015.

Creating Scholarship Item types:

1. In the portal, once you click on 'PeopleSoft' under your Key Links, make sure you are in **Campus Solutions**.

UNIVERSITY OF MINNESOTA
Driven to Discover™

Search MyU Search

MyU Key Links Recommended Favorites My Interests

Welcome to MyU, [User Name] Your Campus: Twin Cities

PeopleSoft Systems

- Campus Solutions
- Human Resources

CS News

HRMS News

MyU Help

OUR CAMPUSES Crookston Duluth Morris Rochester Twin Cities Other Locations

CONTACT U OF M PRIVACY

© 2015 Regents of the University of Minnesota. All rights reserved. The University of Minnesota is an equal opportunity educator and employer.

2. When in PeopleSoft Campus Solutions, navigate to:
 - "UM Create Scholarship Item Type": Main Menu > Financial Aid > UM Scholarships > UM Create Scholarship Item Type
3. Enter:
 - Academic Institution
 - Aid Year
 - and then click 'Add'

Favorites Main Menu > Financial Aid > UM Scholarships > UM Create Scholarship Item Type

UNIVERSITY OF MINNESOTA CSPRD

UM Create Scholarship Item Type

Add a New Value

Academic Institution: UMNTC

Aid Year: 2017

Add

4. Enter your scholarship account string including Fund Code, DeptID, Program Code or Project ID, Account (800102), Chartfield 1/Chartfield 2
5. Click 'Search for Item Type' button to check for existing item types attached to the account string entered.

Favorites > Main Menu > Financial Aid > UM Scholarships > UM Create Scholarship Item Type

UNIVERSITY OF MINNESOTA CSPRD

UM Create Scholarship Item Type

Institution: UMNTC Twin Cities/Rochester [Click here for help with this page](#)

Aid Year: 2015 2014-2015

Item Type:

- OR -

Fund Code	DeptID	Program Code	Project ID	Account	Chartfield 1	Chartfield 2	CS
<input type="text"/>							

Search for Item Type Create Item Type Add

6. That will pull up existing item types to be used
Note: If there is more than one item type attached to the account string, you will need to find the additional item types by using the search function.

Favorites > Main Menu > Financial Aid > UM Scholarships > UM Create Scholarship Item Type

UNIVERSITY OF MINNESOTA CSPRD

UM Create Scholarship Item Type

Institution: UMNTC Twin Cities/Rochester [Click here for help with this page](#)

Aid Year: 2015 2014-2015

Item Type: Thielen Family Scholarship

- OR -

Fund Code	DeptID	Program Code	Project ID	Account	Chartfield 1	Chartfield 2	CS
<input type="text"/>							

Search for Item Type Create Item Type Add

7. If no item type is found, or if you wish to create an additional scholarship item type on your account string, click 'Create Item Type' button.

UNIVERSITY OF MINNESOTA CSPRD

UM Create Scholarship Item Type

Institution: UMNTC Twin Cities/Rochester
Aid Year: 2015 2014-2015

Item Type:

- OR -

Fund Code DeptID Program Code Project ID Account Chartfield 1 Chartfield 2 CS

Search for Item Type Create Item Type Add

8. Type in a 'Scholarship Name' in the field provided (30 character limit).
Note: this will be the scholarship description students see in their financial aid package.

UNIVERSITY OF MINNESOTA CSPRD

UM Create Scholarship Item Type

Institution: UMNTC Twin Cities/Rochester
Aid Year: 2015 2014-2015

Item Type:

- OR -

Fund Code DeptID Program Code Project ID Account Chartfield 1 Chartfield 2 CS

Search for Item Type Create Item Type

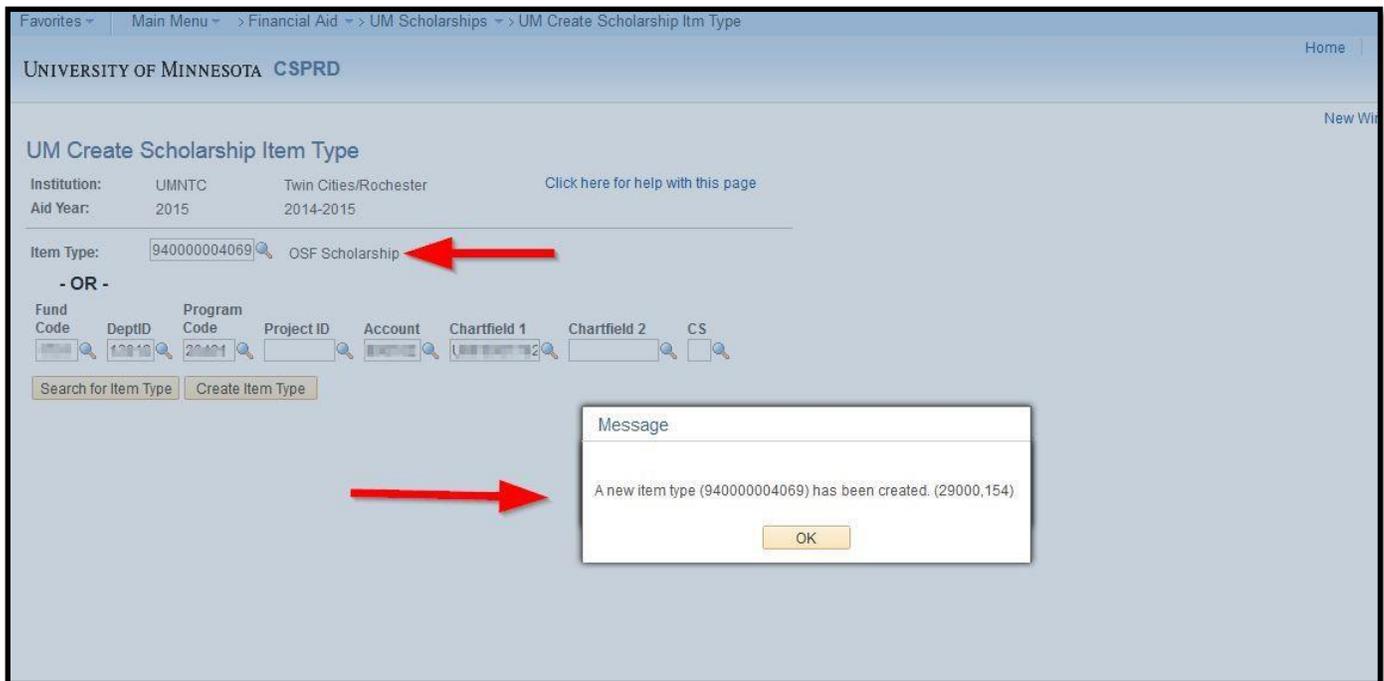
Create Item Type

Scholarship Name: OSF Scholarship
Enrollment Requirement: Enrolled Full-Time

OK Cancel

Note: Enrollment Requirement defaults to 'Enrolled Full-Time' per University financial aid policy.

9. Click 'OK.' Your new scholarship item type has been created and is ready to use for entering scholarships for students.



Building Valid Chartfield Strings for Student Transactions

Item types used in the Student Fee and Scholarship setup also need valid chartfield combinations sent over to the Student and HR systems from the general ledger. These are translated into combo codes. When these are missing, fee setup cannot be completed - impacting tuition calculation, department revenue streams, and possibly resulting in erroneous student bills. Furthermore, when the chartfield combination is not present, a scholarship entry cannot be processed.

Example: a department has two different scholarships. Their chartfield strings are identical until it comes to chartfield 2 (CF2). Two budget journal entries are necessary to create separate chartfield combinations for each scholarship (which will result in two unique combo codes in the Student system).

- Fund 1000, DeptID 12012, Program 20491, Account 800102 and CF2 1000005267 (University Partnership Grant)
- Fund 1000, DeptID 12012, Program 20491, Account 800102 and CF2 1000005037 (Founders Free Tuition)

Follow the instructions below to enter a budget journal to add a chartfield combination to the general ledger. This triggers an overnight process that passes chartfield information to the Student system.

1. Navigate to: UM Commitment Control > Enter Budget Journals > Add
2. From Leger Group search option pull down select: KK _Budget Expense Ledger Group (first one)
3. From Parent Budget Entry type option pull down select: Original

4. Navigate to Budget Line tab and enter: Budget period (aid year), Fund, Dept Id, Program or Project Code, Account (must be 800100) and CF1 or CF2 if applicable. CF3's or FinEmplids are not allowed for scholarship account strings.
5. Click Save. Then click on process icon to post journal.
6. The account string will be available for use (e.g. creating an item type) after an overnight process.

Best Practices for Naming Scholarships:

Please follow the below guidelines when naming scholarships

Guidelines for Naming Scholarship Item Types in PeopleSoft

- Review both the scholarship MOA and any revised MOAs in STAR for the official name of the scholarship fund. In checking STAR:
 - We have found the donor has requested an updated scholarship name but the name had not been changed in PeopleSoft.
 - We have found scholarships where the name of the donor was cut off in PeopleSoft because the character limit exceeded 30 characters. Ex: Both the entire first name of both donors was used, allowing for only the first two letters of the last name.
- If the scholarship Item Type name is entered incorrectly or you find a scholarship name you want updated, contact Dianne Danov (d-dano@umn.edu) or Bob Balfour (b-balfo003@umn.edu) in the Office of Student Finance. They can review for the proper name and update it in PeopleSoft.
- Changes made to the Item Type name are reflected on the Students' Financial Aid Award Notice, the Student Account and on MyU portal. It is updated in the history panels of PeopleSoft so prior years are also updated on the student side. **Note:** The Item Type name, as it was awarded, will appear in STAR. If a change is made after the scholarship was awarded the name change will not be reflected in the STAR recipient list.

Naming Convention

- Only 30 characters are available for the scholarship Item Type name in PeopleSoft. Each space counts as one character.
- Use Scholarship, Fellowship or Award in the name – something descriptive (Ex: use David Wong Scholarship instead of only David Wong).
- Check the spelling of donor's names for accuracy. (Ex: "Jenine" was listed as "Jeannine").
- Include the donor's first and last name. If not enough characters, use the first initial of the donor's first names (Ex: W and R Pennington Scholarship instead of William and Rosemary Pennington Scholarship).
- PeopleSoft **will not accept a period or other special characters** (Ex. the "&" sign) in the Item Type name in Scholarship Automation. When trying to Save in PeopleSoft, you will encounter an error message. You will need to remove the special character and contact Dianne Danov or Bob Balfour to add the character.
- If character space is needed, you can also eliminate the spaces between the "&". That saves two characters and looks fine in PeopleSoft. It will appear as Bill&Susan Smith Scholarship. You will need to contact Dianne Danov or Bob Balfour to make this change.
- Capitalize the first letter of each word in the Item Type name (Ex: Samuel Anderson Scholarship, instead of Samuel Anderson scholarship).

- Do not use all capital letters when creating a Scholarship Item Type. Use *Class of 1946 Scholarship*, instead of *CLASS OF 1946 SCHOLARSHIP*.
- Use “Schol” if there is not enough space for the entire word “Scholarship” in the Item Type name.
- Use “Fellow” if there is not enough space for the entire word “Fellowship” in the Item Type name.

Summer Scholarships

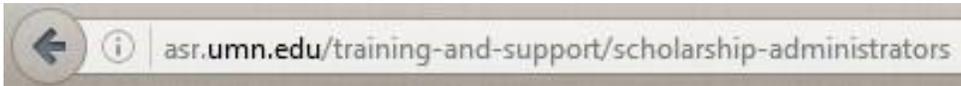
- A separate dedicated Item Type is required for processing summer scholarships in PeopleSoft.
- You can include the word “Summer or SS” in the Item Type name to differentiate a Fall/Spring scholarship from a Summer scholarship when using the same name.
 - Example: John Doe Scholarship and John Doe Scholarship Summer

If you have any questions about new item types you are either creating or updating, contact Dianne Danov or Bob Balfour.

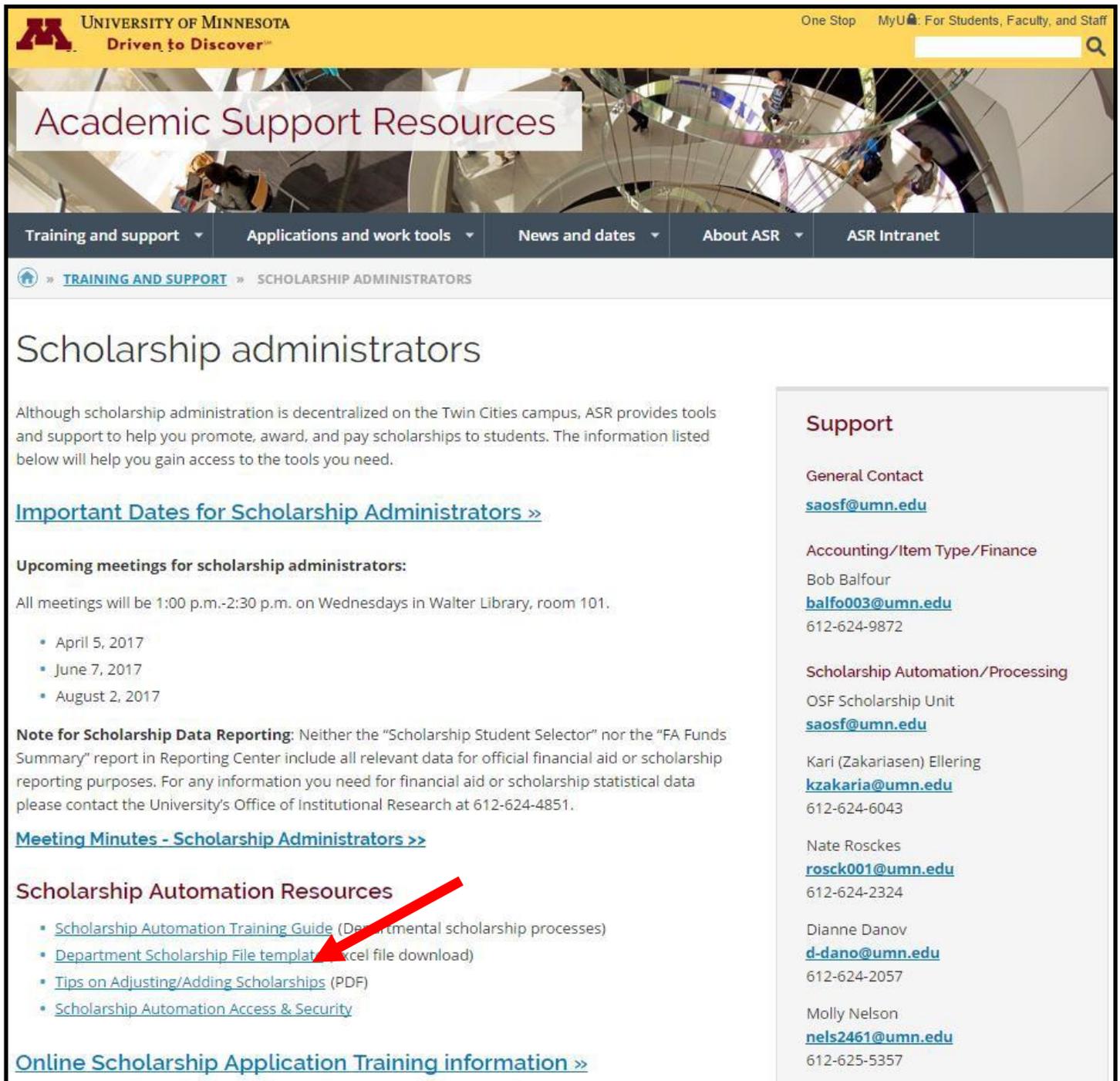
Upload your Scholarship File in PeopleSoft using Scholarship Automation

Creating Scholarship (.csv) Files for Upload:

Start by opening the **REQUIRED** Excel template. The “**Department Scholarship Template**” file can be found on the ASR website at asr.umn.edu/training-and-support/scholarship-administrators



Note: You will need to log in with your Internet ID and Password to access the web page.



The screenshot shows the ASR website interface. At the top is the University of Minnesota logo and navigation links. The main header reads "Academic Support Resources". Below this is a navigation menu with categories like "Training and support", "Applications and work tools", "News and dates", "About ASR", and "ASR Intranet". The breadcrumb trail indicates the current location: "TRAINING AND SUPPORT » SCHOLARSHIP ADMINISTRATORS".

Scholarship administrators

Although scholarship administration is decentralized on the Twin Cities campus, ASR provides tools and support to help you promote, award, and pay scholarships to students. The information listed below will help you gain access to the tools you need.

[Important Dates for Scholarship Administrators >>](#)

Upcoming meetings for scholarship administrators:

All meetings will be 1:00 p.m.-2:30 p.m. on Wednesdays in Walter Library, room 101.

- April 5, 2017
- June 7, 2017
- August 2, 2017

Note for Scholarship Data Reporting: Neither the “Scholarship Student Selector” nor the “FA Funds Summary” report in Reporting Center include all relevant data for official financial aid or scholarship reporting purposes. For any information you need for financial aid or scholarship statistical data please contact the University’s Office of Institutional Research at 612-624-4851.

[Meeting Minutes - Scholarship Administrators >>](#)

Scholarship Automation Resources

- [Scholarship Automation Training Guide](#) (Departmental scholarship processes)
- [Department Scholarship File template](#) (Excel file download)
- [Tips on Adjusting/Adding Scholarships](#) (PDF)
- [Scholarship Automation Access & Security](#)

[Online Scholarship Application Training information >>](#)

Support

General Contact
saosf@umn.edu

Accounting/Item Type/Finance
Bob Balfour
balf003@umn.edu
612-624-9872

Scholarship Automation/Processing
OSF Scholarship Unit
saosf@umn.edu

Kari (Zakariasen) Ellering
kzakaria@umn.edu
612-624-6043

Nate Rosckes
rosck001@umn.edu
612-624-2324

Dianne Dano
d-dano@umn.edu
612-624-2057

Molly Nelson
nels2461@umn.edu
612-625-5357

The “Department Scholarship File Template”

The current scholarship process is completed by using a template that needs to be uploaded into PeopleSoft. If you do not use this template your scholarship file will error and will not load.

NOTE: It is recommended to use the *Department Scholarship File* template, located on the ASR Scholarship Administrators Training and Support page each time vs saving the template on your desktop.

In this template, you will enter data in the fields: Student ID, Item Type Number, Award Amount, and Term(s) to process your scholarships.

There are **edits on all of the columns within the template that must not be altered** for your file to upload successfully:

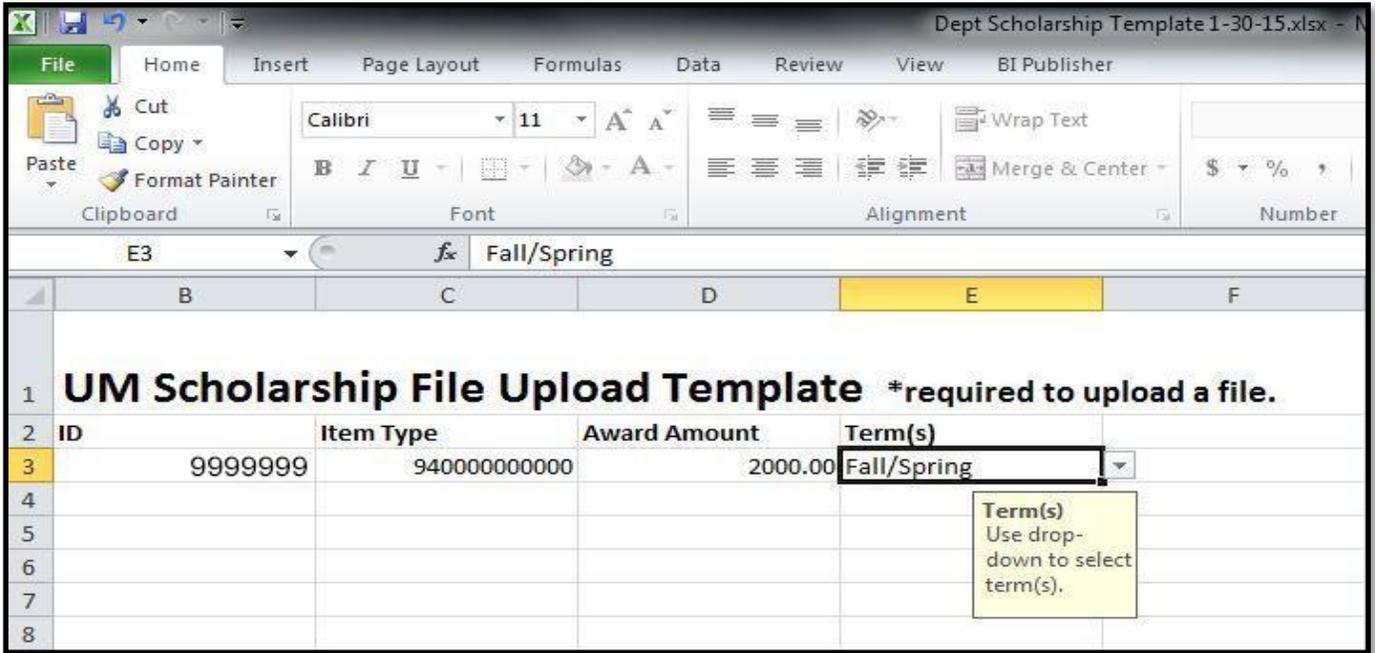
- ID = must be a 7 digit number
- Item Type = must be a 12 digit number starting with a 94
- Award Amount = **cannot be currency (contain \$)**. It must be formatted as a “Number” and must be less than 100,000. **DO NOT** include dollar signs.
- Term(s) – must be one of the drop-down menu options: **Fall/Spring, Fall Only, Spring Only, or Summer**
 - Selecting the “Fall/Spring” option will divide the award amount equally between the two semesters. For example, if the award amount is \$1000 and the Term(s) is “Fall/Spring”, \$500 will be placed into Fall and \$500 will be placed into Spring
- **You can put multiple item types on the template. You do not need to upload a separate file for each item type.**

NOTE: If you are using the **copy and paste function**, please review the detailed information on pages 13-14 to ensure the formatting is not altered.

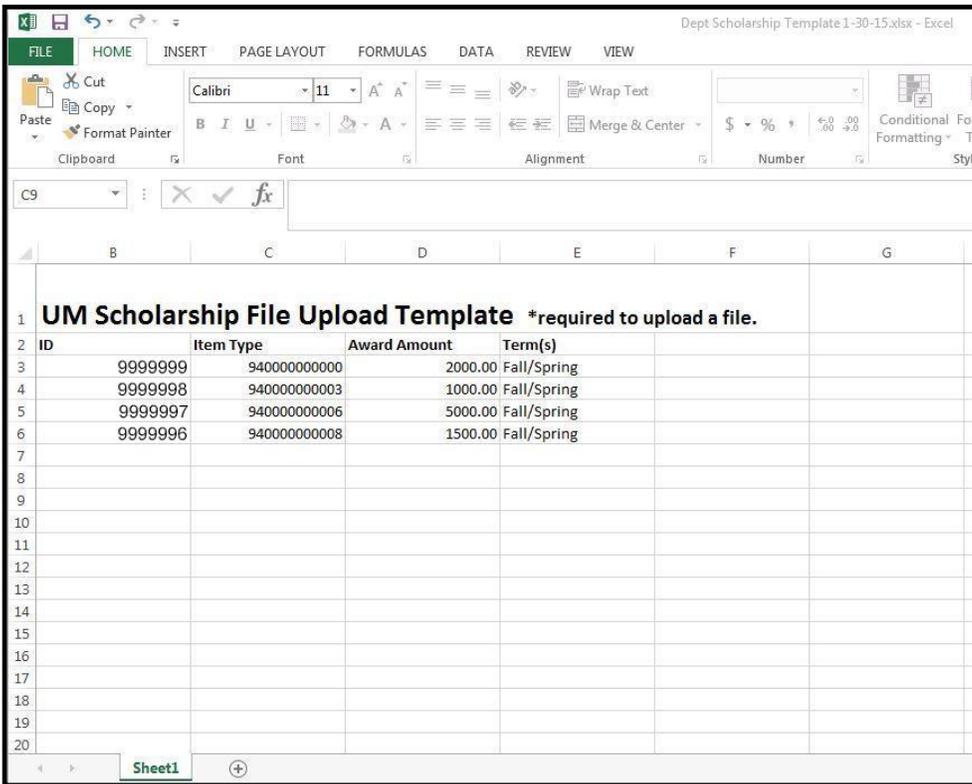
	B	C	D	E	F
1	UM Scholarship File Upload Template *required to upload a file				
2	ID	Item Type	Award Amount	Term(s)	
3					
4					
5					
6					
7					
8					

EXAMPLES:

Every scholarship will require an Empl ID, Item Type, Award Amount, and Term(s). Below is an example of a total scholarship award of \$2000 with an even split Fall/Spring award (\$1000 will be placed into Fall, and \$1000 will be placed into Spring).



Below is an example scholarship file entered with multiple students and multiple item types as even split Fall/Spring awards.



NOTE: If you wish to cancel out a scholarship for one term, you would enter the amount and term you wish to keep. For example, if you originally had a \$2000 Fall/Spring award, and now want \$1000 Fall Only, you would create a file with the Student ID, Same Item Type, Award Amount of \$1000, and Term(s) Fall Only. This new file will **replace the previously entered scholarship award (there is no need to enter a separate line for Spring).**

UM Scholarship File Upload Template *required to upload a file.			
ID	Item Type	Award Amount	Term(s)
9999999	940000000000	1000.00	Fall

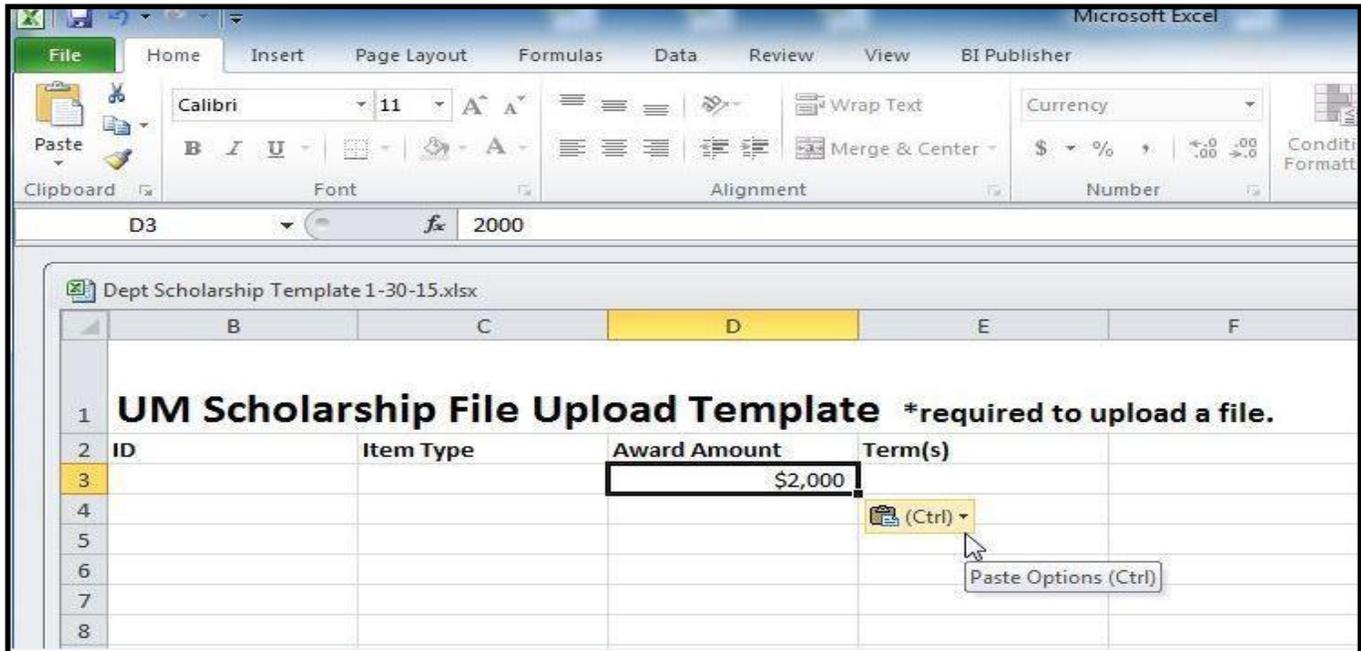
If you wish to add or adjust an amount for one term (no longer keeping it an even split), you would enter the amount and term you wish to adjust along with the term you want to keep. For example, your original award was uploaded as F/S for \$2,000 and now you want to increase the Spring disbursement by \$500 so the new total award is \$2,500. You would enter one line with Fall at \$1,000 and another line for Spring at \$1500. If you were to only upload a new line for the Spring amount of \$500, it will replace the original F/S for \$2,000 with the Spring only award of \$500.

UM Scholarship File Upload Template *required to upload a file.			
ID	Item Type	Award Amount	Term(s)
9999999	940000000000	1000.00	Fall
9999998	940000000000	1500.00	Spring

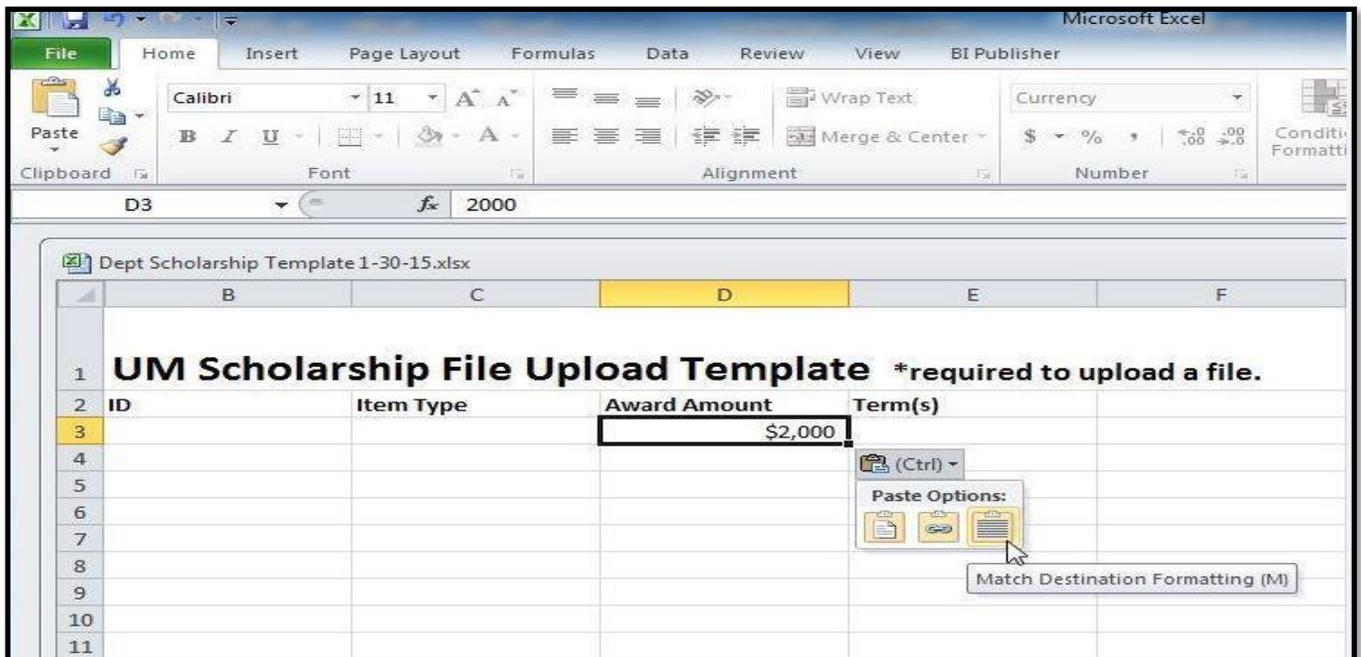
COPYING AND PASTING

****NOTE:** If you use a copy and paste from a different source (even another Excel spreadsheet), make sure you choose “Match Destination Formatting” or “Values” from the paste options. Using the default or “Keep Source Formatting” will result in the edits being overridden and your .csv file not being properly formatted for upload. If improperly formatted, your file will error.

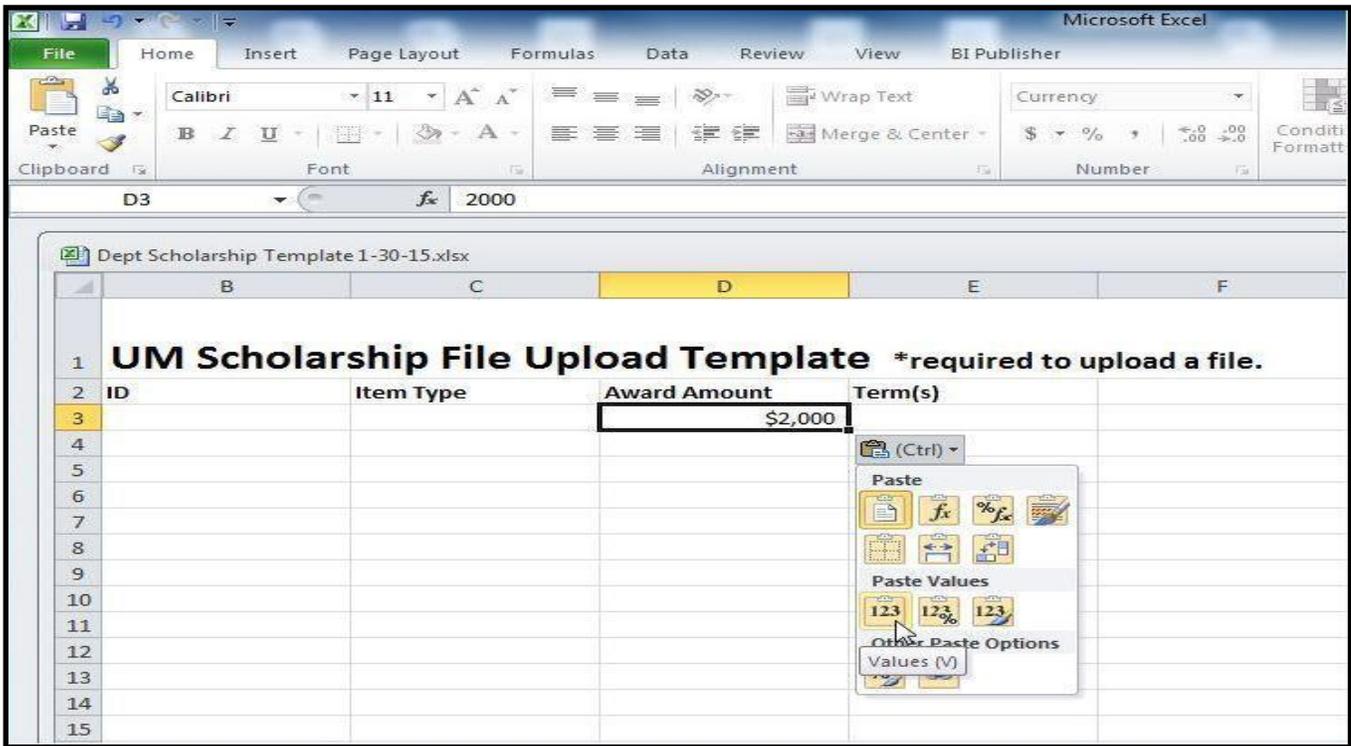
Use “Paste Options”



Use “Match Destination Formatting”



Or Use "Values"



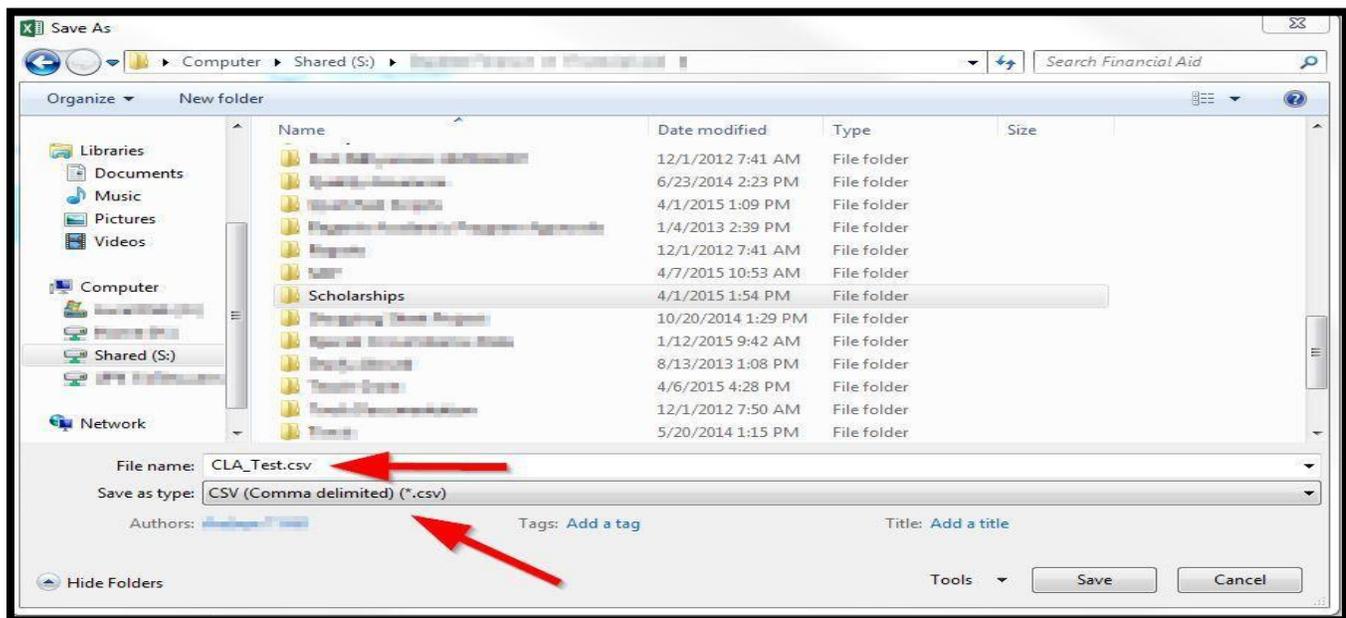
SAVING THE TEMPLATE

You must do a '**Save As**' and specify a **.csv** as the format (in a secure location).

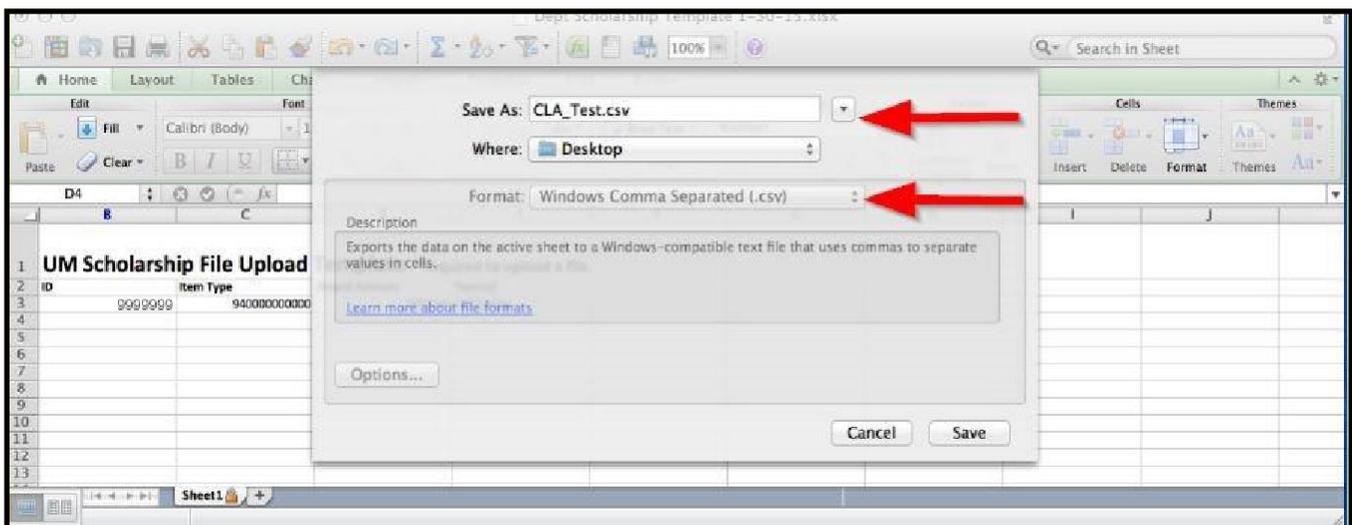
You must start the file name with your college abbreviation (e.g., CLA, CSE, CSOM, CEHD, CDES, CFANS, CCE, DENT, PHARM, etc.). If you are not in a college, use your area abbreviation (e.g., OED for the "Office of Equity and Diversity" or OSF for the "Office of Student Finance", etc.) The file name cannot be longer than 31 characters including the .csv extension.

NOTE: If using a PC, do the '**Save As**' a **Comma delimited .csv** file: **If using a Mac**, see 2nd screenshot below.

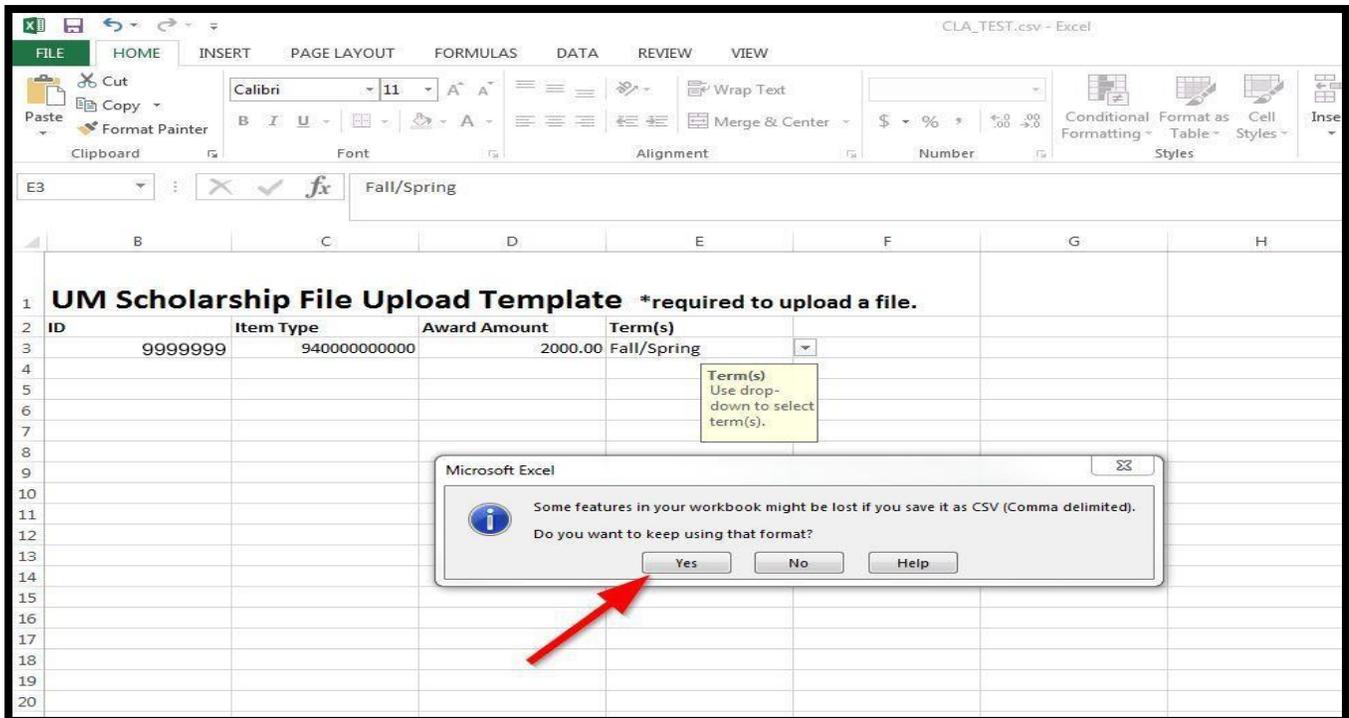
CAUTION: Once you save it as a .csv file, you cannot continue to edit the file. It should be considered a final step and ready to upload into PeopleSoft.



NOTE: If using a Mac, do the '**Save As**' a **Windows Comma Separated .csv** file (see below):



After the 'Save As', It will ask you to keep using format. Click "Yes".

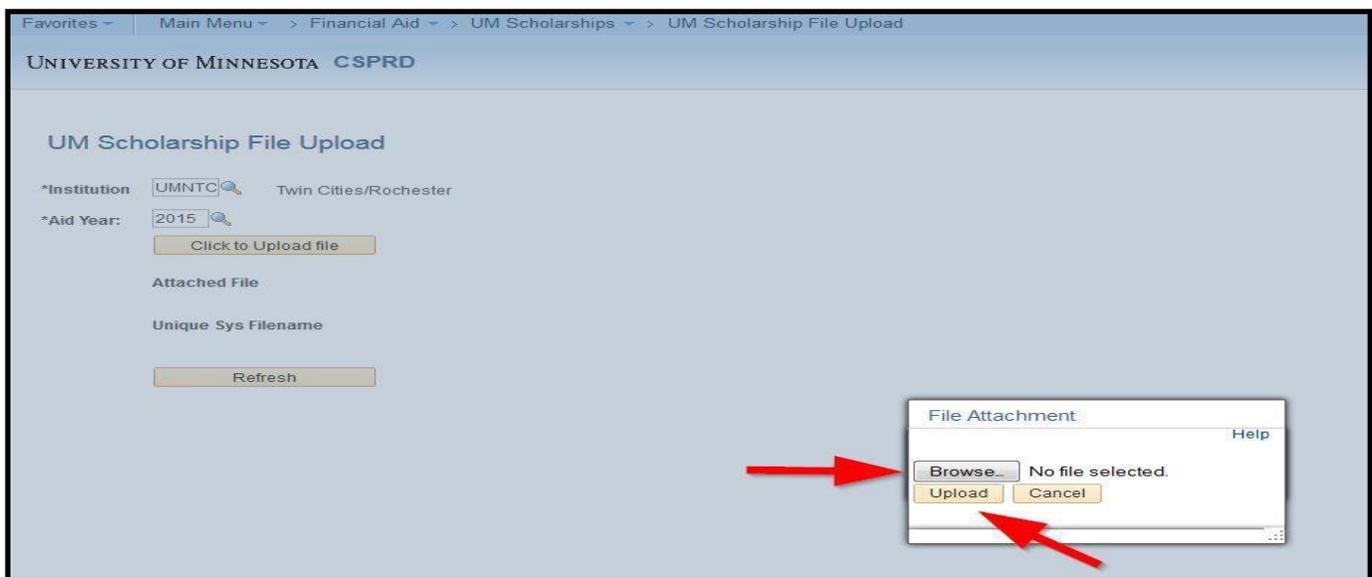


Uploading Scholarship (.csv) Files: (PeopleSoft Scholarship Entry)

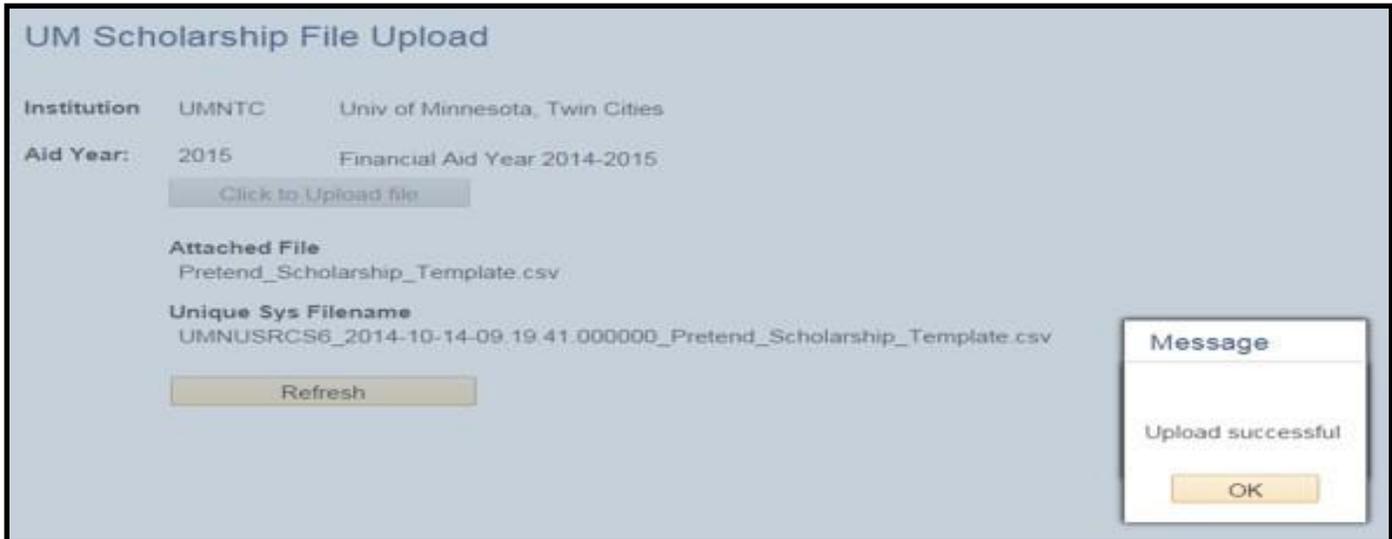
1. In PeopleSoft, make sure you are in **Campus Solutions** and navigate to:
 - Main Menu > Financial Aid > UM Scholarships > UM Scholarship File Upload
2. Enter:
 - Academic Institution
 - Aid Year, and then
 - click on 'Click to Upload file' button.



3. Locate your .csv file on your computer and select it for upload.
4. Click 'Upload' button.



5. After you “Click to Upload File,” your scholarship entry process is complete. If the upload is not successful, it means one of two things:
 - 1) you do not have your file formatted to a .csv file or
 - 2) your file name contains more than 31 characters. If that is the case, you will need to re-create the file.
6. The file(s) you uploaded will be processed automatically overnight if you enter the file by 1:00 pm that day. The process runs Monday – Friday evenings.



7. Click 'Refresh' button to upload additional scholarship files.



Warning: Scholarship files uploaded after the official close of the semester or aid year may not be processed correctly in PeopleSoft. If you have a situation that requires a scholarship adjustment after the close of the semester or aid year, please contact the Office of Student Finance Scholarship Unit at saosf@umn.edu for guidance.

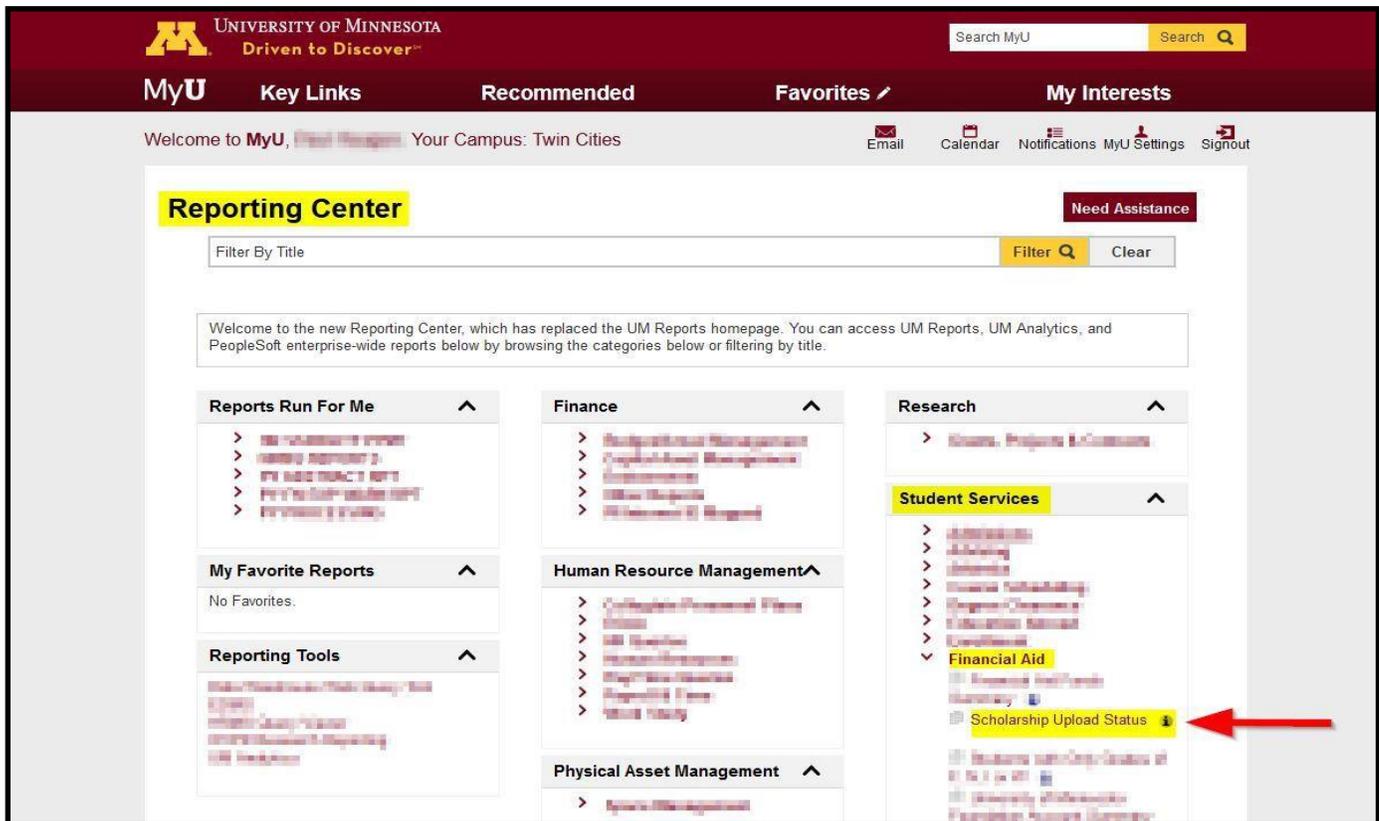
- New scholarship files may not be uploaded after the financial aid year has ended. The financial aid year ends on the last official day of Summer in August. (FYI: May session is part of Summer).
- Fall only scholarships must be entered prior to the end of fall semester
- Spring only scholarships prior to the end of spring semester.

Reporting Center:

The *Scholarship Upload Status Report* provides scholarship administrators the ability to see the status of their department's scholarship files after they have been uploaded into PeopleSoft.

NOTE: To review your entries in the *Scholarship Upload Status Report*, allow one business day for the file(s) to be processed (if the file was entered before 1:00 pm)

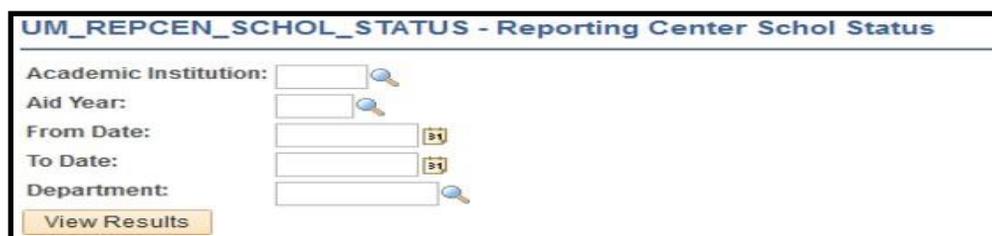
To find the report, when you are in your portal, click on 'Key Links'. Then from the drop-down select 'Reporting Center'. In the 'Reporting Center', you will find the "Scholarship Upload Status" Report under *Student Services > Financial Aid*.



Note: Click on the "information" button left of the report for further documentation about the report.

The report will prompt for:

1. Academic Institution
2. Aid Year
3. Date Range
4. DEPT ID.



Guidance for Adjusting or Adding Amounts to Existing Scholarships:

Adjusting/Adding Scholarships

Original Fall only Award

UM Scholarship File Upload Template *required to upload a file.				
ID	Item Type	Award Amount	Term(s)	
9999999	940000000000	1000.00	Fall	

Adding a Spring Award:

EXAMPLE #1

You determine that the student is now eligible for a Spring award that matches the Fall award.

UM Scholarship File Upload Template *required to upload a file.				
ID	Item Type	Award Amount	Term(s)	
9999999	940000000000	2000.00	Fall/Spring	

EXAMPLE #2

You determine the student is eligible for an additional \$2000 for Spring.

UM Scholarship File Upload Template *required to upload a file.				
ID	Item Type	Award Amount	Term(s)	
9999999	940000000000	1000.00	Fall	
9999999	940000000000	2000.00	Spring	

If you realize you made a mistake after submitting a file, please reach out to us at saosf@umn.edu before you take any steps to correct the file. We will assist you in resolving any issues.

Original Fall/Spring Award

UM Scholarship File Upload Template *required to upload a file.

ID	Item Type	Award Amount	Term(s)	
9999999	940000000000	6000.00	Fall/Spring	

Adjustments to one term:

EXAMPLE #1

You find out that the student is attending less than FT in Spring and need to prorate their Spring award:

UM Scholarship File Upload Template *required to upload a file.

ID	Item Type	Award Amount	Term(s)	
9999999	940000000000	3000.00	Fall	
9999998	940000000000	1500.00	Spring	

Do NOT enter the file using the Fall/Spring split if there will be a different award amount for Fall than Spring or vice versa. If you entered the award as \$4500 Fall/Spring, it would split that amount evenly between the terms

EXAMPLE #2

You determine that the student is no longer eligible for their Spring disbursement and you need to cancel the Spring award:

UM Scholarship File Upload Template *required to upload a file.

ID	Item Type	Award Amount	Term(s)	
9999999	940000000000	3000.00	Fall	

Do NOT enter a file with a line for 0.00 Spring only as that will cancel the entire award (Fall and Spring). There is no need to enter a second Spring line with 0.00.

EXAMPLE #3

You determine that you want to increase the Spring award by \$500.

UM Scholarship File Upload Template *required to upload a file.

ID	Item Type	Award Amount	Term(s)	
9999999	940000000000	3000.00	Fall	
9999999	940000000000	3500.00	Spring	

Do NOT enter a file for only the 500.00 Spring increase amount as that will replace the other \$6000 Fall/Spring award already in the system with the \$500 Spring only award.

For Questions: Contact the Office of Student Finance Scholarship Unit

Main Scholarship Unit Email

saosf@umn.edu

LuGail Hamel

lhamel@umn.edu

612-624-6043

Nate Rosckes

rosck001@umn.edu

612-624-2324

Michelle Curtis

mcurtis@umn.edu

612-626-6518

