UM Departmental Scholarship Processes

February 29, 2016

Included in this document are the detailed steps required for processing UM Department Scholarships.

The steps in this section include:
1) Scholarship Access
2) Creating item types
3) Creating Scholarship (.csv) files for upload
4) Uploading Scholarship (.csv) files
5) Reporting Center

Scholarship Access

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. Dept ID and role level security will be granted to Duluth staff based on a list provided to Data Security in February, 2015. New staff will need to submit an ARF (Access Request Form) to Data Security before creating new item types and uploading scholarships.
Item Type Creation

1. Navigate to:
   - “UM Create Scholarship Itm Type”: Main Menu > Financial Aid > UM Scholarships > UM Create Scholarship Item Type

2. Enter:
   - Academic Institution (Duluth=UMNDDL)
   - Aid Year (example: Aid Year 2015 includes Fall 2014, Spring 2015 and Summer 2015)
   - and then click ‘Add’

3. Enter your scholarship account string including Fund Code, DeptID, Program Code or Project ID, Account (800102), Chartfield 1/Chartfield 2

4. Click ‘Search for Item Type’ button to check for existing item types attached to the account string entered.
5. That will pull up existing item types to be used

6. 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.

**Important Note for Summer Term**

If a scholarship item type was used for the fall/spring award period, the same item type cannot be used for the summer award period. You will need to create a summer item type. Use the word “summer” in the item type description when creating your new item type. If this process is not
followed the student will receive an adjustment on their fall/spring student account that will generate a bill causing them to possibly lose their enrollment for the following term.

7. 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 and on their student account.

NOTE: Enrollment Requirement defaults to ‘Enrolled Full-Time’ per University financial aid policy.
8. Click ‘OK.’ Your new scholarship item type has been created and is ready to use for entering scholarships for students.
Creating Scholarship (.csv) Files for Upload

Start by opening the **REQUIRED** Excel template. The “**Dept Scholarship Template**” file can be found on the Scholarship Administration website at [http://d.umn.edu/onestop/faculty-staff/scholarship-admin/ps-dept-entry-process.html](http://d.umn.edu/onestop/faculty-staff/scholarship-admin/ps-dept-entry-process.html).

**The “Dept Scholarship Template”**

There are **edits on all of the columns 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
- Term(s) – must be one of the drop-down menu options
  - **Fall/Spring** – standard option for students attending both Fall and Spring terms
  - **Fall Only** – use this option for students attending only Fall term
  - **Spring Only** – use this option for students attending only Spring term
  - **Summer** – use this option for students attending either or both May session and Summer session

For other scenarios, contact Hilary Ramsey, [hramsey@d.umn.edu](mailto:hramsey@d.umn.edu) or 218-726-8793

- 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 use a copy and paste from a different source, 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.
**UM Scholarship File Upload Template** *required to upload a file.*

<table>
<thead>
<tr>
<th>ID</th>
<th>Item Type</th>
<th>Award Amount</th>
<th>Term(s)</th>
</tr>
</thead>
</table>

**EXAMPLES:**

Every scholarship will require an Empl ID, Item Type, Award Amount, and Term(s). Below is an example of an even split fall/spring award.
Below is an example scholarship file entered as even split fall/spring awards.

You can have multiple item types in a single file as shown above.
Making adjustments to awards

To reduce an award from two terms to one term, you would enter the amount and term you want to keep. To cancel an award entirely, you would enter the amount as 0 (zero) and term.

NOTE: Changes to previously entered awards will only process after the original entry has posted to the student’s financial aid awards. If time is critical, contact the Scholarship Program Manager for assistance.
SAVING THE TEMPLATE

Do a ‘Save As’ and specify a .csv as the format. (in a secure location)

Please name the file starting with your college or department abbreviation (e.g., CLA, SCSE, LSBE, FA 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, see example below.

![PC example](image1)

NOTE: If using a Mac, do the ‘Save As’ a Windows Comma Separated .csv file:

![Mac example](image2)
**Preview the File** *(Best Practice to ensure your file is correct and processes correctly)*

In Notepad (TextEdit for Mac), open your file. You will see the data you entered, separated by commas, which are used for formatting purposes. The ‘Header/ Detail’ is formatting that is hidden.

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

1. **Navigate to:**
   - Main Menu > Financial Aid > UM Scholarships > UM Scholarship File Upload

2. **Enter:**
   - Academic Institution (Duluth=UMNDL)
   - Aid Year (example: Aid Year 2015 includes Fall 2014, Spring 2015 and Summer 2015)
   - and then click ‘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. The file(s) you uploaded will be processed automatically overnight if you enter the file by 1:00 pm that day. The process runs Mon – Fri evenings. If your upload is not successful, it means one of two things:
   a. you do not have your file formatted to a .csv file or
   b. your file name contains more than 31 characters. If that is the case, you will need to recreate the file and save with a shorter file name
6. Click ‘Refresh’ button to upload additional scholarship files.

NOTE: To review your entries, allow one business day for the file(s) to be processed (if the file was entered by 1:00 pm), and then visit the ‘Reporting Center’ for the report, Scholarship Upload Status, which will show the processed file.

Reporting Center

To review your entries, allow one business day for the file(s) to be processed, if the file was entered before 1:00 p.m.
Go to the Reporting Center > Student Services > Financial Aid > Financial Aid > Scholarship Upload Status. This report that will show the uploaded file status. The report prompts you for Academic Institution, Aid Year, Date Range and Dept ID.

You will see the status of each record. Successful records show “processed”. If a record shows a status of “error”, “skip” or “suspend”, the Scholarship Program Manager will resolve the issue and contact you if necessary.
Questions?

Please email:

umdschol@d.umn.edu