

# Promotional Scholarship Data Entry Training Manual

## Promotional Scholarship Data Entry - Entering scholarship information and criteria into PeopleSoft.

This data set supports the “Undergraduate Scholarship Search” web tool used to advertise institutional scholarship opportunities to current University of Minnesota students.

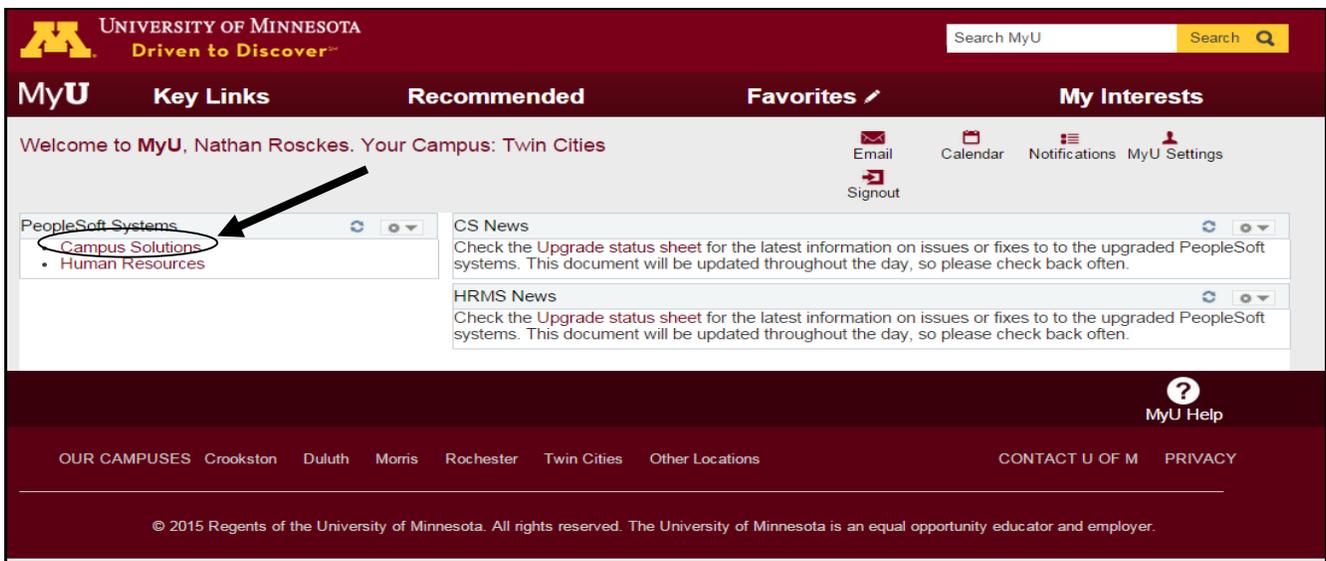
### Access to UM Promotional Scholarships:

The UM Promotional Scholarship component in PeopleSoft requires a separate access request.

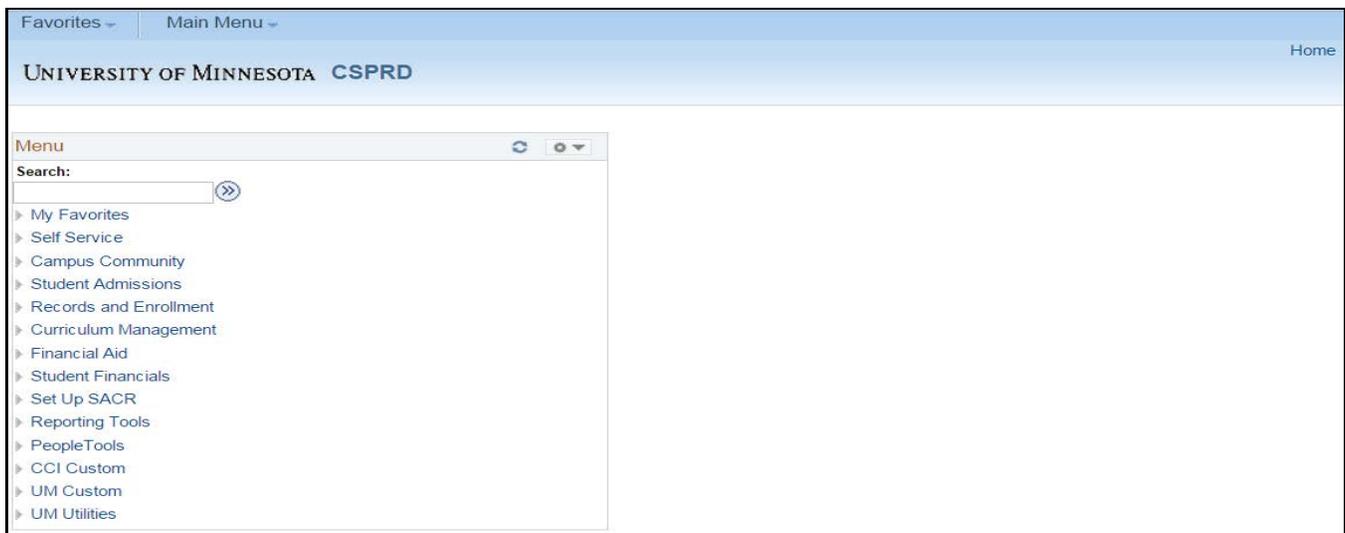
1. Visit OIT Data Security’s web page: <http://www1.umn.edu/datasec/security/RequestingaccessPDF.html> and complete an “Access Request Form” (ARF), along with a “Promotional Scholarship Proc” attachment.
2. Complete and submit the forms to OIT Data Security.

### 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.

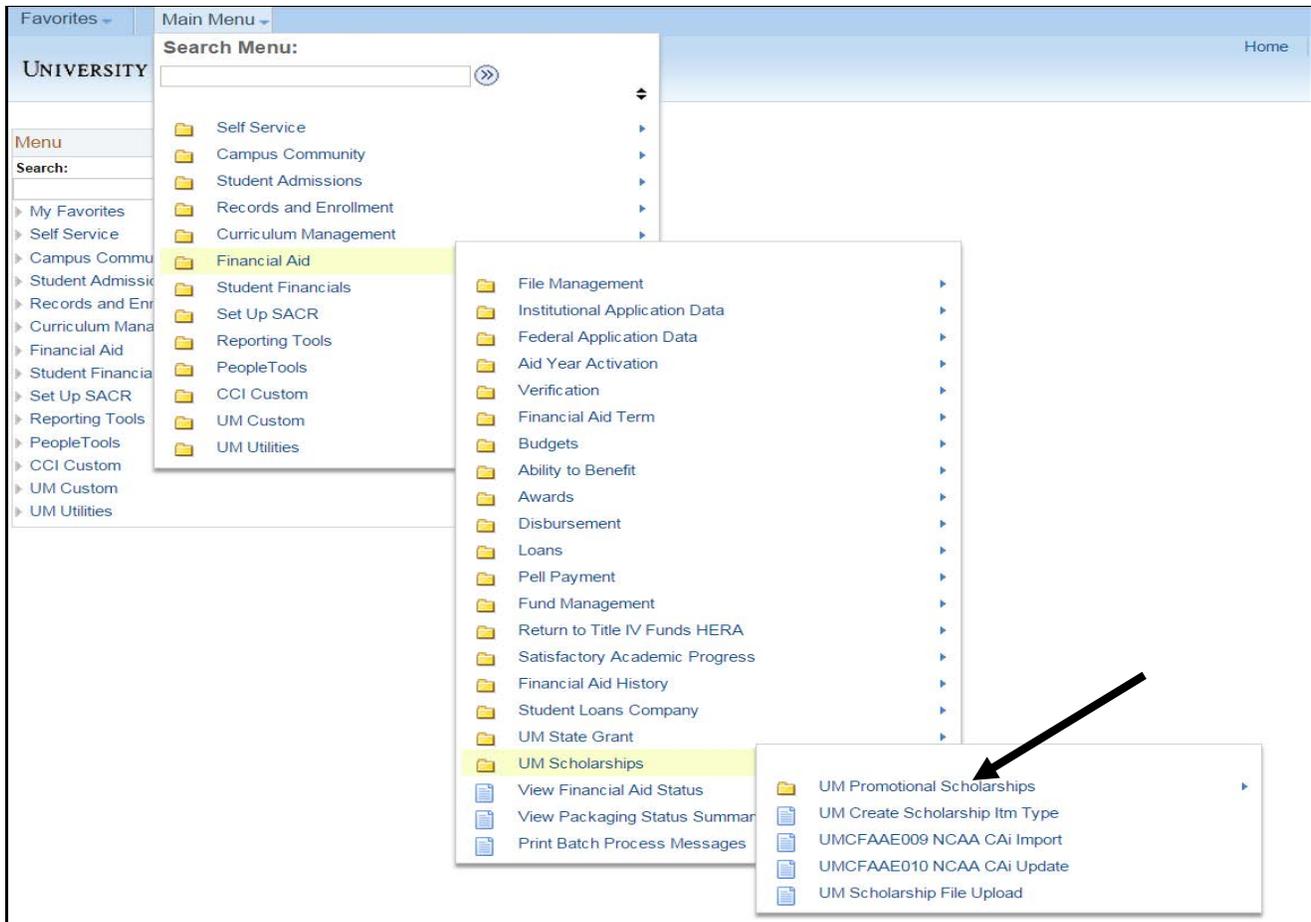


3. You will now be at the main menu page of PeopleSoft CSPRD. Your options may differ from what is shown here, depending on your training and access.

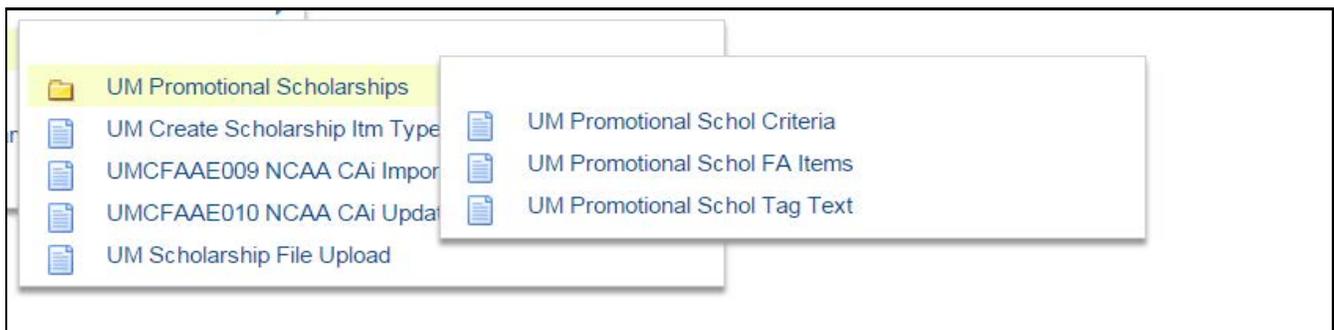


## UM Promotional Scholarships

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).

## Part 1: Promotional scholarship descriptions

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'll see a search interface (below).

**UM Promotional Schol Item Type**

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

**Find an Existing Value** **Add a New Value**

**Search Criteria**

**Academic Institution:** [=]

**Item Type:** [begins with]

**Title:** [begins with]

**Criteria Code:** [=]

**Status as of Effective Date:** [=]

**Include History**  **Correct History**

Limit the number of results to (up to 300):

**Search** **Clear** **Basic Search** **Save Search Criteria**

[Find an Existing Value](#) | [Add a New Value](#)

**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.

**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 Item Type" page in PeopleSoft. Once the item type is created, proceed to "B" above.

Contact the Scholarship Unit in OSF at [saosf@umn.edu](mailto: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 your 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 will be included in reports that are produced by the University, colleges, or departmental units in support of business process or decision-making. Scholarships can be kept Active if there is a chance they will be used again.
- Inactive Promotional Scholarships are not currently in use and don't officially exist. Inactive Promotional Scholarships will not be included in any reports that are produced in support of business process or decision-making.

**Public/Private\*:**

- Promotional Scholarships marked "Public" can be advertised to prospective students, parents, 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), though they will appear in internal reports. Data can be obtained via RSS or XML feed to your unit, should you choose.

**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 "Opportunity 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 is the description that 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).

Enter the Department ID for each department that should have access to this scholarship.

The screenshot shows the 'UM Security Deptid' tab in a web application. At the top, it displays 'Academic Institution' as 'UMNTC' and 'Item Type' as '935000000200 Dr A A Granovsky Scholarship'. Below this, there are navigation options: 'Find | View All' and 'First 1 of 24 Last'. The 'Eff Date' is '04/24/2014' and the 'Status' is 'Active'. A table below shows the assigned departments:

*Department	Description
1 710A	Student Finance Admin, Ofc of

At the bottom of the screen, there are buttons for 'Save', 'Return to Search', 'Add', 'Update/Display', and 'Include Histo'. The breadcrumb trail at the bottom reads 'UM Promo Scholarship Descriptn | UM Security Deptid'.

**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.

## Part 2: Opportunity Criteria sets

Home > Financial Aid > UM Promotional Scholarships > UM Promotional Schol Criteria

### To set up an Opportunity Criteria set:

1. Click on the “UM Promotional Schol Criteria” Page in the left navigation Menu
2. You’ll see a search interface (below). The next step is to **decide which of these two tasks you want to complete:**

2A: Search for your Academic Institution (UMNTC) to see a list of existing Opportunity

**UM Promotional Schol Criteria**

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

[Find an Existing Value](#) [Add a New Value](#)

**Search Criteria**

Criteria Code: =

Academic Institution: = UMNTC

Academic Career: =

Description: begins with

Status as of Effective Date: =

Include History  Correct History

Limit the number of results to (up to 300): 300

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

2B: Click “Add a New Value” to enter a new Opportunity Criteria.

### A. Find an existing Opportunity Criteria set already entered in the database:

Enter your Academic Institution (UMNTC), then click “Search.” The results should yield all the Opportunity Criteria sets you have access to see. You can also search by an exact Criteria Code number, etc.

### B. Enter a new Opportunity Criteria Set:

Click the “Add a New Value” tab. Enter the Academic Institution (UMNTC) and the Career. Opportunity Criteria sets are always associated with a Career.

### 3. UM Criteria Set-up Screen

The screenshot shows the 'UM Criteria Setup' interface. At the top, there are tabs for 'UM Demographic Criteria', 'UM Academic Criteria', and 'UM Security Deptid'. Below the tabs, the 'Criteria Code' is 142, 'Institution' is UMNTC, and 'Career' is Undergrad. The main form area includes a search bar with 'Find | View All' and pagination 'First 1 of 2 Last'. Below this are fields for '\*Eff Date' (01/16/2008), '\*Status' (Active), and '\*Description' (OSF General 3.0 FT w/Need). There are also '+ -' buttons for these fields. At the bottom, there is a 'Category Tags' section with 'Personalize | Find' and pagination 'First 1 of 1 Last'. Below this is a table with columns '\*Tag ID' and 'Associated Tags', showing a single entry with '1' in the Tag ID column.

Fill in the following fields to describe your Opportunity Criteria. (Required fields are marked with \*.)

**Eff Date\*:** The effective date is the date the criteria were entered. Or, 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’ll see this screen:

The screenshot shows a 'Look Up Tag ID' dialog box. It has a 'Tag ID' dropdown menu set to '=', a 'Tag' dropdown menu set to 'begins with', and a search input field. Below the search fields are buttons for 'Look Up', 'Clear', and 'Cancel'. The 'Basic Lookup' label is visible. Below the buttons is a 'Search Results' section with a table. The table has columns 'Tag ID' and 'Tag'. The results are as follows:

Tag ID	Tag
1	Field Work
2	Internship
3	Research
4	Learning Abroad
5	Military Service
6	Disability
7	International Students
8	Students who are Parents
9	First Generation Students
10	Multicultural
11	Returning Adult Students
12	Religious Heritage
13	Presidential Scholarship Match
14	Ethnic Heritage
15	Professional Development
16	Leadership
17	New Freshman
18	Transfer Students

#### 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

UM Criteria Setup	UM Demographic Criteria	UM Academic Criteria	UM Security Deptid
Criteria Code	142	Institution	UMNTC
Career	Undergrad		
<b>Academic Criteria</b> Find   View All First 1 of 2 Last			
Eff Date	01/16/2008	Status	Active
<b>GPA</b>		<b>Honors</b>	
Minimum GPA	3.000	<input checked="" type="radio"/> Not Applicable <input type="radio"/> Required <input type="radio"/> Preferred	
Preferred GPA	3.000		
<b>Credits</b>			
Minimum Credits in Progress	12.00	Maximum Credits in Progress	
<b>Class Standing</b> Find First 1 of 1 Last			
Class Standing:		Association	Preferred
<b>Academic Program</b> Find First 1 of 1 Last			
Academic Program	99PRD Non Degree Coursework	Association	Ineligible
<b>Academic Plan/Subplan</b> Find First 1 of 1 Last			
Academic Plan		Association	Preferred
Academic Sub-Plan		Association	Preferred

**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

The screenshot shows the 'UM Security Deptid' screen in a web application. At the top, there are two tabs: 'UM Promo Scholarship Descriptn' and 'UM Security Deptid'. Below the tabs, the screen displays the following information:

- Academic Institution: UMNTC
- Item Type: 935000000200
- Dr A A Granovsky Scholarship
- Find | View All | First | 1 of 24 | Last
- Eff Date: 04/24/2014
- Status: Active

Below this information is a table with the following columns: \*Department, Personalize | Find | Description, and First | 1 of 1 | Last. The table contains one row:

*Department	Personalize   Find   Description	First   1 of 1   Last
1 710A	Student Finance Admin, Ofc of	

At the bottom of the screen, there are several buttons: Save, Return to Search, Add, Update/Display, and Include Histo. The callout box points to the '710A' department ID in the table.

“Ownership” of an Opportunity 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

The screenshot shows a web interface titled "Look Up Department". At the top right is a close button (X) and a "Help" link. Below the title is a search form with the label "Department:" followed by a dropdown menu set to "begins with" and a text input field containing "710A". Below the form are three buttons: "Look Up", "Clear", and "Cancel", followed by a link labeled "Basic Lookup".

Below the buttons is a section titled "Search Results". It includes a pagination control showing "View 100", "First", "1 of 1", and "Last". Below this is a table with two columns: "Department Description" and "Short Description".

Department Description	Short Description
710A	Student Finance Admin, Ofc of OSF ADMIN

**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](mailto:saosf@umn.edu)