

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
- LuGail Hamel 612-624-6043
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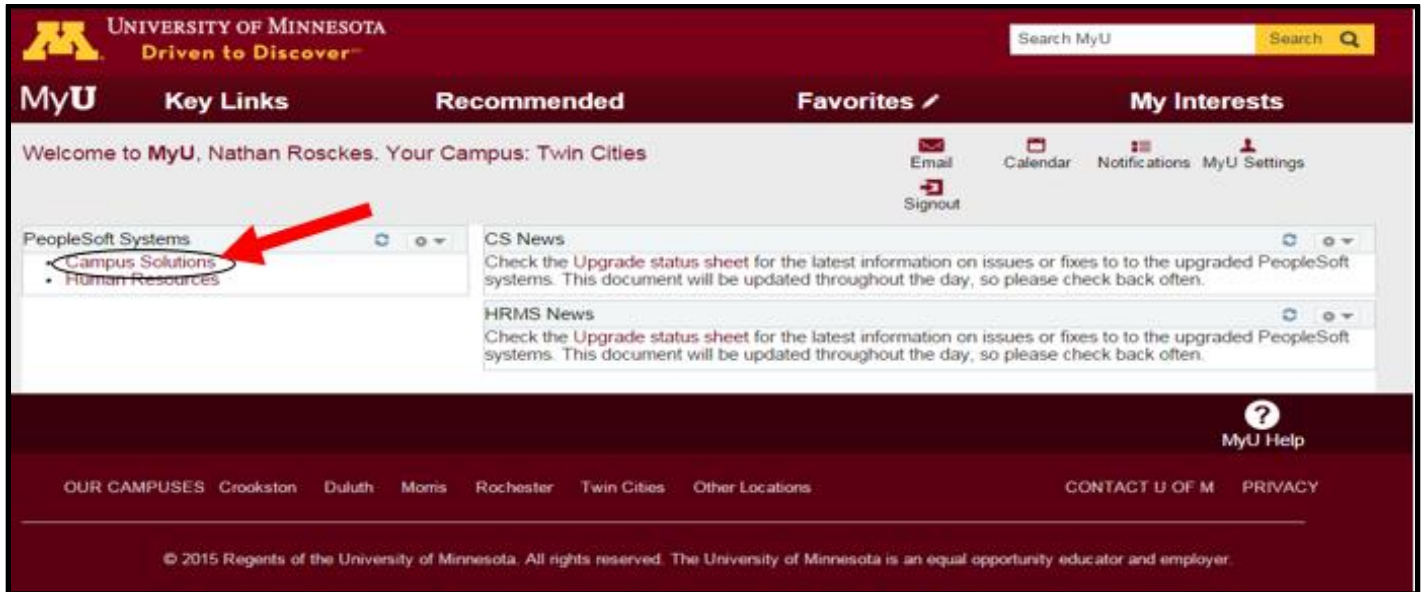
OFFICE of STUDENT FINANCE
Academic Support Resources
UNIVERSITY OF MINNESOTA

Getting Started:

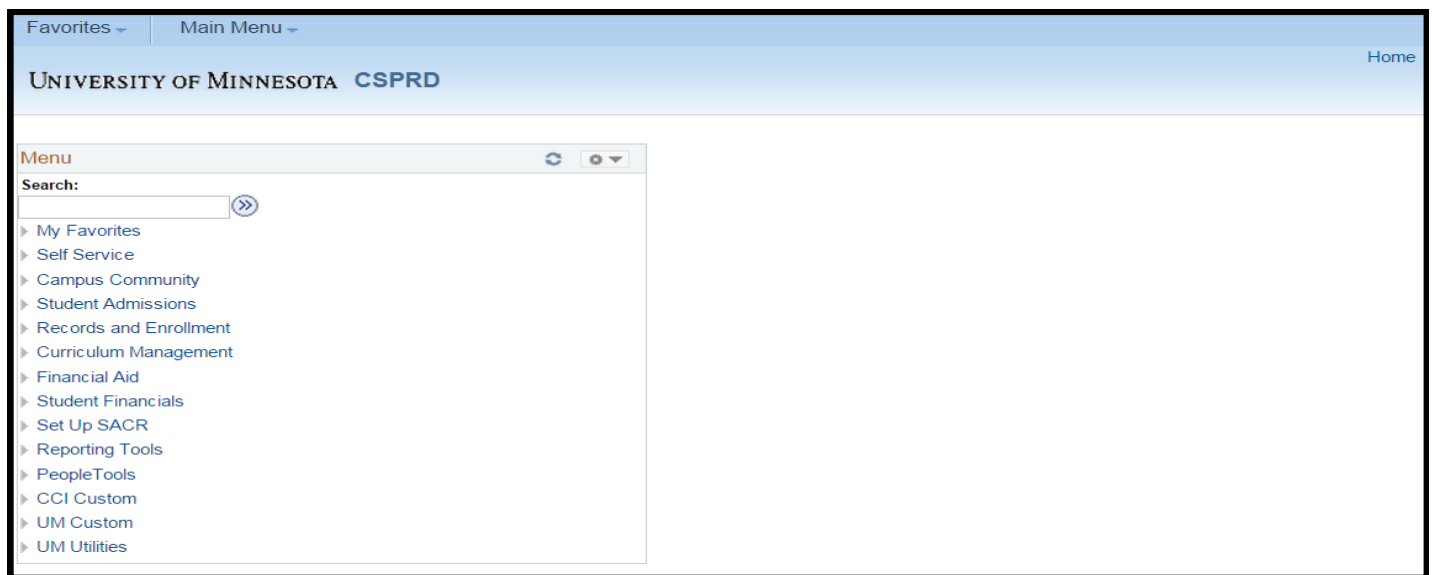
Access to UM Promotional Scholarships in PeopleSoft:

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.



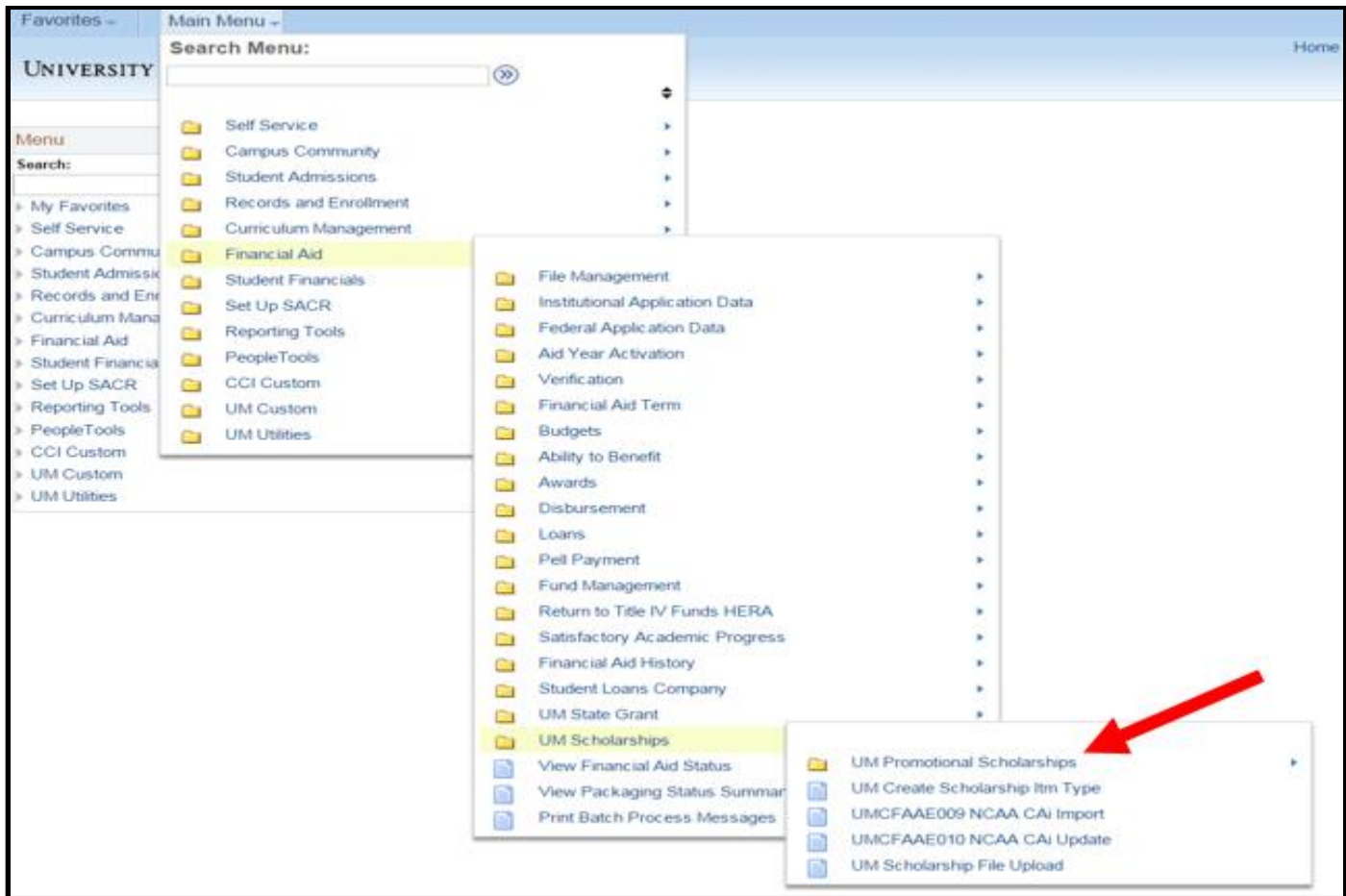
4. You will now be at the main menu page of PeopleSoft CSPRD. Your options may differ from what is shown here, depending on your training and access.



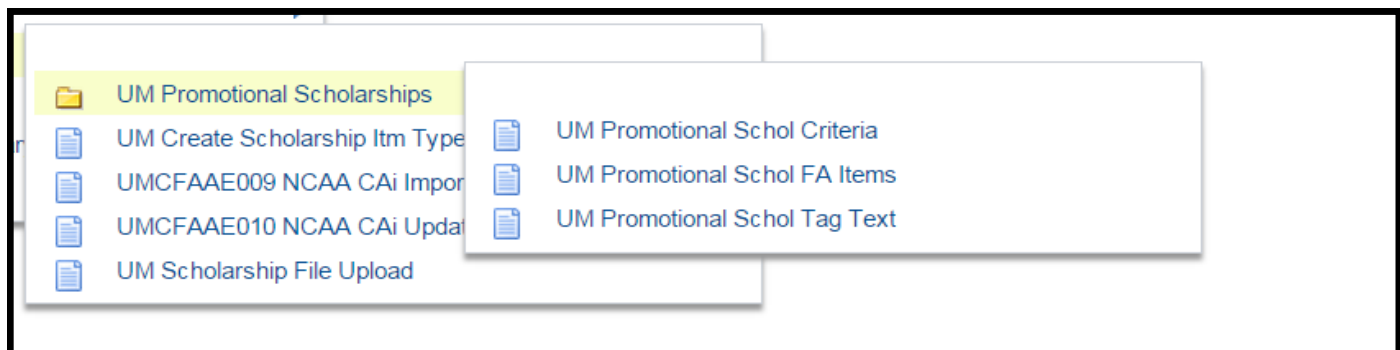
Process to Begin Setting Up Your Scholarships

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).

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**

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 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 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).

UM Promo Scholarship Descriptn | UM Security Deptid

Academic Institution: UMNTC | Item Type: 935000000200 | Dr A A Granovsky Scholarship

Find | View All | First | 1 of 24 | Last

*Eff Date: 2/2/2017 | *Status: Active

*Title: Dr. A. A. Granovsky Scholarship

Short Title: | *Public/Private: Public

*Criteria Code: 195 | Dr A. A. Granovsky Scholarship | UM Criteria Code

*Contact Email: umschol@umn.edu | Contact Phone: 612/624-1111

*Brief Search Results Description (254 characters):
To be considered for this scholarship a student must have Ukranian ancestry, at least sophomore standing, demonstrate financial need, and submit an essay to the Office of Student Finance that documents Ukranian background.

Long Public Description:
Application deadline July 1st. Amount of awards vary annually based upon available funds.
This award was established in the name of Alexander A. Granovsky by the University of Minnesota. Ukranian Club is 4005 in recognition of scholastic achievement and outstanding contribution to the

Application Information URL:
http://www.onestop.umn.edu/finances/financial_aid/scholarships/university/student_finance.html

Donor Information URL:
|

Internal Description:
|

Save | Return to Search

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.

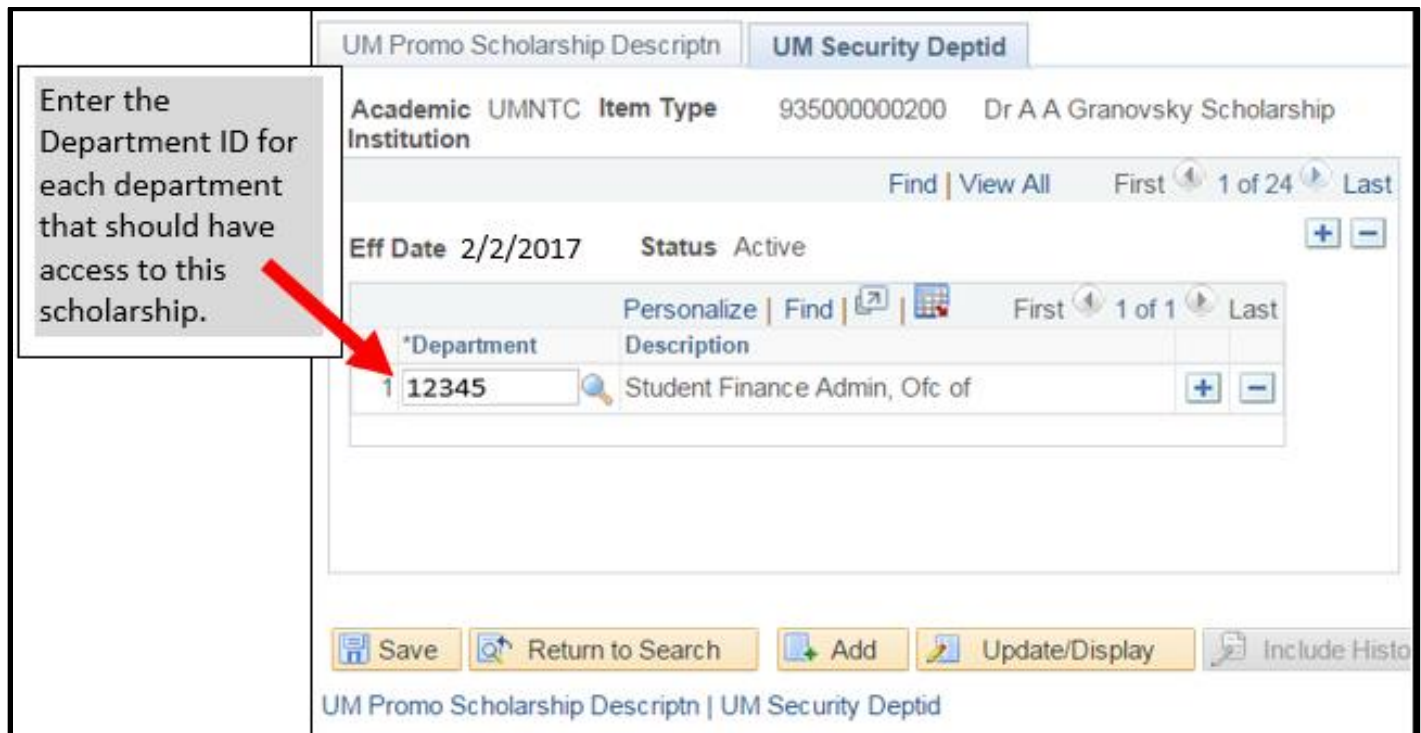
Application information URL: This is an essential field for all scholarships marked "Public." Students will follow this link from their search results to your designated scholarship information or application page to discover how they should apply for your scholarship.

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).



The screenshot shows the 'UM Security Deptid' screen. On the left, a grey box contains the text: 'Enter the Department ID for each department that should have access to this scholarship.' A red arrow points from this box to the 'Department' field in the table below. The table has two columns: 'Department' and 'Description'. The first row contains the value '12345' in the 'Department' field and 'Student Finance Admin, Ofc of' in the 'Description' field. The table is part of a larger form that includes fields for 'Academic Institution', 'Item Type', 'Eff Date', and 'Status'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Add', 'Update/Display', and 'Include Histo'.

*Department	Description
1 12345	Student Finance Admin, Ofc of

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 Schol 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:**

The screenshot shows the 'UM Promotional Schol Criteria' search page. It includes a search bar with 'Find an Existing Value' and 'Add a New Value' buttons. Below the search bar are input fields for 'Criteria Code', 'Academic Institution' (with a dropdown arrow), 'Academic Career' (with a dropdown arrow), 'Description' (with a 'begins with' dropdown arrow), and 'Status as of Effective Date' (with a dropdown arrow). There are also checkboxes for 'Include History' and 'Correct History', and a text input for 'Limit the number of results to (up to 300): 300'. At the bottom are 'Search' and 'Clear' buttons, and links for 'Basic Search' and 'Save Search Criteria'. Two red arrows point to the 'Add a New Value' button and the 'Academic Institution' dropdown. Two text boxes provide instructions: '2A: Search for your Academic Institution (UMNTC) to see a list of existing UM Promotional Schol' and '2B: Click “Add a New Value” to enter a new UM Promotional Schol'.

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

2B: Click “Add a New Value” to enter a new UM Promotional Schol

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

UM Criteria Setup | UM Demographic Criteria | UM Academic Criteria | UM Security Deptid

Criteria Code 142 Institution UMNTC Career Undergrad

Find | View All First 1 of 2 Last

*Eff Date 2/2/2017 *Status Active

*Description OSF General 3.0 FT w/Need

Category Tags Personalize | Find | First 1 of 1 Last

Tag ID	Associated Tags
1	

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:

Look Up Tag ID

Tag ID: Tag: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-18 of 18 Last

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

The screenshot displays the 'UM Academic Criteria' screen. At the top, there are tabs for 'UM Criteria Setup', 'UM Demographic Criteria', 'UM Academic Criteria' (selected), and 'UM Security Deptid'. Below the tabs, the criteria are listed for 'Criteria Code 142 Institution UMNTC Career Undergrad'. The 'Academic Criteria' section shows 'Eff Date 2/2/2017' and 'Status Active'. The 'GPA' section has 'Minimum GPA 3.000' and 'Preferred GPA 3.000'. The 'Honors' section has radio buttons for 'Not Applicable' (selected), 'Required', and 'Preferred'. The 'Credits' section has 'Minimum Credits in Progress 12.00' and 'Maximum Credits in Progress'. The 'Class Standing' section has a dropdown for 'Class Standing' and an 'Association Preferred' dropdown. The 'Academic Program' section has 'Academic Program 99PRD Non Degree Coursework' and an 'Association Ineligible' dropdown. The 'Academic Plan/Subplan' section has 'Academic Plan' and 'Academic Sub-Plan' dropdowns, both with 'Association Preferred' dropdowns.

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

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

UM Promo Scholarship Descriptn | UM Security Deptid

Academic Institution: UMNTC Item Type: 935000000200 Dr A A Granovsky Scholarship

Find | View All First 1 of 24 Last

Eff Date: 2/2/2017 Status: Active

Personalize | Find | Description

*Department: 12345 Student Finance Admin, Ofc of

Save Return to Search Add Update/Display Include Histo

UM Promo Scholarship Descriptn | UM Security Deptid

"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

The screenshot shows a web application window titled "Look Up Department". It features a search input field with a dropdown menu set to "begins with" and the text "12345". Below the input field are three buttons: "Look Up", "Clear", and "Cancel". To the right of these buttons is a link labeled "Basic Lookup". Below the buttons is a section titled "Search Results". This section includes a "View 100" label, a "First" button with a left arrow, a "1 of 1" indicator, a "Last" button with a right arrow, and a "Help" link in the top right corner. A table displays the search results with two columns: "Department Description" and "Short Description". The first row shows the department code "12345" and the description "Student Finance Admin, Ofc of OSF ADMIN".

Department Description	Short Description
12345	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

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:

The screenshot shows the University of Minnesota's Undergraduate Scholarship Search tool. The header includes the University of Minnesota logo and navigation links for various campuses. The main heading is "Scholarship Search - For undergraduate students". A message states, "you may be eligible for 37 scholarships!". Below this, there are filters to refine the list by tag, including "Not tagged (33)", "Disability (1)", "Learning Abroad (2)", "Research (1)", "Transfer Students (1)", and "New Freshman (1)". A section titled "37 scholarships for you to consider" lists three scholarships: the Andrew Drescher Scholarship, the Al Johnson Construction Company Scholarship, and the Florence Hanson Waits Scholarship. Each entry includes a brief description and links to "Apply or learn more" and "Email this information". On the right side, there is a "Your Student Profile" section with fields for Name, College, Major, GPA, and Residency. Below this is a "What if..." section with links for various scenarios. At the bottom right, the "Your Starred Scholarships" section shows that no scholarships have been starred.

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:

University Wide Study Abroad Scholarship

[Apply or learn more](#)
[Email this information](#)

Open to students on the Twin Cities campus enrolled as degree-seeking undergraduates going on approved study abroad programs - a minimum of 3 weeks/3 credits. Students will be considered for all awards.

Tags: Learning Abroad

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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