System Overview

The Scholarship Datamart was developed in 2008 through a partnership between Financial Aid and Scholarships (FAS) and the Office of Institutional Research and Planning (OIRP).

The Scholarship Datamart is a tool housed within OIRP’s Departmental Executive Management Information System (DEMIS). It allows on-campus users to track and manage scholarship funds and recipients. It is primarily intended to help users track KUEA scholarship funds but can also be used to track scholarships with other funding sources (course fee funds and EOF funds). It is not used to track fellowship funds.

At present, the Scholarship Datamart has a number of functions:

- Review scholarship projections and balances for 2005-06 to the present award year
- Review scholarship recipient data for 2005-06 to the present award year
- Search for eligible scholarship recipient data based on donor criteria
- Review required and preferred donor criteria for scholarship funds
- Analyze demonstrated financial need of potential scholarship recipients
- Find contact information for students receiving scholarship awards
- Review Rising Student Scholarship (RSS) commitments for FAS and academic units
- View summaries of scholarship spending by Business Unit for 2005-06 to the present award year

University of Kansas staff members who have a role in awarding and tracking scholarship funds may request access to the Scholarship Datamart, with permission of the immediate supervisor and the Dean (or designee) of the appropriate School or College.

Authorized users of the Scholarship Datamart are required to protect the sensitive and confidential information contained therein, as outlined in the Code of Responsibility that all users sign upon access.

The security of any information downloaded or printed from the Scholarship Datamart is the responsibility of the authorized user. That information should be maintained in a secure manner in accordance with the KU Information Technology Security Policy which can be found at [http://policy.ku.edu/IT/information-technology-security-policy](http://policy.ku.edu/IT/information-technology-security-policy).

How to Get Help

For assistance with the Rising Student Scholarship initiative or reports, please contact Gail Sherron at gsherron@ku.edu or 864-5418.

For assistance with all other Scholarship Datamart reports, or for access questions, please contact Sara Vancil at svancil@ku.edu or 864-5494.

For assistance with scholarship postings or disbursement issues, please email scholaward@ku.edu.
Logging into the Scholarship Datamart and Preparing to Download Reports

Log into DEMIS by visiting: https://demisweb2.ku.edu/Portal or by going to http://oirp.ku.edu/ and clicking DEMIS from the Quick Links on the right.

Before you can properly export from the Scholarship Datamart, you must add DEMIS to Internet Explorer’s trusted sites. View the video tutorial available in the Help and Training Information portlet in DEMIS.

How to Export Data from the Scholarship Datamart

There are two types of reports used in the Scholarship Datamart. The type of report used determines the method in which you can download or export data from the report.

<table>
<thead>
<tr>
<th>SAS Stored Process</th>
<th>A stored report that is available for you to execute on demand from the portal. The stored process will first show you an input form which allows you to customize the report contents, to a certain extent. You are given several output formats. Any manipulation must be done by choosing an output format that supports this, such as Excel. If you choose to view a stored process in the web browser, no further flexibility is available.</th>
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<tbody>
<tr>
<td>SAS Report</td>
<td>A report that is more interactive in the web browser output. Users can move or hide columns of data and can also filter. Data can be exported to Word or Excel for further manipulation directly from the data table.</td>
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<tr>
<td>(Web Reports</td>
<td>Studio)</td>
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To export a table from a SAS Report, right click on the beige-colored top row of the table. (You might need to click around a couple of times to be presented with the correct menu.) Then click on Export Table. You'll be presented with options to Export as Excel or Word or to Save a .csv file. If you get errors or if your export does not open, you may not have configured your security settings properly and should review that section of this users guide.
CURRENT SCHOLARSHIP MANAGEMENT REPORTS AVAILABLE

Aggregate Listing of Recipients by Department

Use this report to create a list of all recipients for all funds in a given department. This provides an excellent historical account of all of your recipients across all of your funds from year to year.

- Input your KU Online ID (all in CAPS) to be shown your assigned departments and funds.
  - You can choose to view only one year or view multiple years in the same report.
  - You can choose to view only one department or view multiple depts in the same report.
  - You can choose to view only one fund or view multiple funds in the same report.
- Each student will have as many rows as they have scholarships. Each row will list the scholarship name, item type and amount disbursed. Additionally, GPA and enrollment information will be listed on scholarships for the most recent aid year available.
- While you can view the results in a Web browser (which is the only option if viewing on an iPad), the Excel Report is a better option if you wish to manipulate the results further. For example, you could sort or filter by department, year, fund, or student. You also have the option of an Excel data file (.csv)
- The more years, departments and funds you ask to see in one report, the longer it will take to run.

Departmental Scholarship Award History by KUID

Use this report to view the complete scholarship award history for a student by entering the student’s KUID. You will only see scholarship history for those funds to which you have access.

- You can input more than one KUID but you must do so one-by-one. The main purpose of this report is to look up a single, inquiring student. If you want award history for a whole set of students, you should use the Aggregate Listing of Recipients by Department and download a report of all of your students.
- The focus of this report is fairly narrow so the results include only a few basic pieces of information. For each student queried, a row will be returned for each scholarship received. The row will include aid year, department, scholarship item type and name, and total disbursed amount. The student’s email address is also provided.
Review Balances and Current Recipients by Department

This report has three levels. First, you can view your scholarship fund projections, spending and remaining balances for the current award year and historical award years. Second, you can drill down on any fund to see the recipients of that fund. Third, you can drill down on any of those recipients to see a full scholarship award history for that student.

- You first choose which year(s) and department(s) you’d like to view. You are then presented with your list of funds. Each row lists item type, fund name, IFAS number and the fiscal information. You can also see if a fund is need based, the minimum hours required for the fund to disburse and how many recipients were awarded.
- You next may click a fund to drill down to the student recipient data. You will be provided with GPA and enrolled hours only if you are viewing the most recent award year. You are also provided with the disbursed amounts for fall, spring and summer, the most recent disbursement date, and the student’s email.
- Finally, you may click a student to drill down to the student’s full scholarship award history. You will only see scholarships for which you have access. This allows you to easily see from this report if a student who got Scholarship X was also given Scholarship Y.

Search for Eligible Recipients by Department

This is one of two reports which allows you to search for students who may be eligible for your scholarships. You would use this particular report when you do not have a list of students in mind. Rather, you would like the Datamart to find all students who fit the criteria of your scholarships.

- Input your KU Online ID (in all CAPS) to be shown a list of departments to which you have access.
- Select the population(s) of students you want to find: UGDL, LAW or GRDL. At this time, the Datamart only separates students by the careers used in the Enroll & Pay system. Hit “Apply.”
- Select the department of your choice and hit “Apply.”
- From the list of funds, select those you wish to query. The more funds you choose, the longer the report will take to run as it is trying to match many students with many criteria.
- The report will return financial aid detail and fund eligibility detail by default. You can also add additional fields to your report such as GPA, citizenship detail and major.
- While you can view the results in a Web browser (which is the only option if viewing on an iPad), the Excel Report is a better option if you wish to manipulate the results further. For example, you may wish to filter on the remaining balance in each fund so that you can spend funds in a particular order such as by most restrictive first.
- The resulting table will list all the funds across the top with all the students along the left side. You would read it the same way you would read the output of Search for Eligible Recipients by KUID and Fund (see next report.)
Search for Eligible Recipients by KUID and Fund

This is one of two reports which allows you to search for students who may be eligible for your scholarships. You would use this particular report when you have a particular fund or funds in mind and you also have a list of students you need to specifically search for. For example, when you have a list of the students that your department has to cover for the Rising Student Scholars initiative, you can plug those students into this report to cross-check against the funds you have available to use on those commitments.

- Input your KU Online ID (in all CAPS) to be shown a list of departments to which you have access.
- Select the department of your choice and hit “Apply.”
- From the list of funds, select those you wish to query. The more funds you choose, the longer the report will take to run as it is trying to match many students with many criteria.
- Paste in a list of the KUIDs you want to cross check.
- The report will return financial aid detail and fund eligibility detail by default. You can also add additional fields to your report such as GPA, citizenship detail and major.
- While you can view the results in a Web browser (which is the only option if viewing on an iPad), the Excel Report is a better option if you wish to manipulate the results further. For example, you may wish to filter on the remaining balance in each fund so that you can spend funds in a particular order such as by most restrictive first.
- The resulting output will list all the funds across the top with all the students along the left side. The cells where each row joins each column will tell you if a student is Eligible or Not Eligible for the scholarship. If the scholarship has an preferred criteria, it will also tell you if the student Meets Preferred. Finally, if the student has money already from a fund or had money in the past from a fund, the information will be provided. The table will also include need analysis information for students who have filed a FAFSA or International Student Need Analysis Worksheet and have a complete financial aid file.

Review Scholarship Criteria

Use this report to create a reference sheet of the criteria associated with your scholarship funds.

- Start by choosing which department you wish to find funds for. Next select the funds desired.
- The resulting table will include information on each fund including: department, business unit, item type, fund name, IFAS number, minimum hours required for the fund to disburse and IFAS fund comments.
- You will be able to see the criteria equations for both required and preferred criteria. These equations are how Financial Aid and Scholarships attempts to help the system find eligible students.
  - We can only query on criteria that is captured about students in the Enroll & Pay system.
  - Uncaptured criteria will be listed for your reference but is not being queried on.
  - It is your responsibility to ensure that your recipients meet the donor’s wishes. This tool can assist with that but in many cases is unable to find students who meet every criteria desired.
  - It is your responsibility to review this list regularly to ensure that we are capturing your criteria properly. For example, if you have program or plan codes added, deleted or changed, you should notify us so we can modify the appropriate equations.
Review Need Analysis by KUID

This report is provided to assist you in determining if students have financial need. Some donors require financial need and some prefer it. You cannot see need analysis information for an upcoming academic year until late March after the Financial Aid and Scholarships office has begun awarding. For example, need information for 2016-2017 was available on March 18, 2016.

- Paste in a list of KUIDs.
- While you can view the results in a Web browser (which is the only option if viewing on an iPad), the Excel Report is a better option if you wish to manipulate the results further. For example, you may wish to sort by original need to see which students have the most financial need.
- Students who have not filed a FASFA or International Student Need Analysis Worksheet or who have an incomplete FAFSA or ISNAW cannot have need analyzed. These students will show up with all values blank. Once a FAFSA/ISNAW is filed and completed, the student’s need will then be evaluated.
- How Need is calculated:
  - Cost of Attendance - Expected Family Contribution = Original Need
  - Original Need-(Total Gift+Total Work Study+Total Need based Loans) = Unmet Need
- If a fund simply requires that a student have financial need, you could look at Original Need to confirm that the number is greater than $0. Of course, you could prioritize students who have higher Original Need. If you also want to consider other aid already accepted by the student, you can look at the other columns. The Total Gift column represents all other free money (grants/scholarships/waivers) being given to the student. In most cases, it is perfectly acceptable and encouraged to award more scholarship money to replace loans and work-study.
- For assistance in interpreting Need Analysis reports, please contact Financial Aid and Scholarships.

Scholarship Spending by Business Unit

This report allows you to see for each Business Unit how well the scholarship projections for a given year were spent and what percent remained unused.

- Choose the Business Unit (school/college) and select the aid year of interest on the left.
- The report will drill down to the departments in that school. Select a department to see the individual funds assigned to that department.
- Review the projected amount as well as the remaining unspent amount.
- Click to drill down to see at a glance the criteria associated with a fund. For example, if a fund was not spent, you might be able to ascertain from the fund criteria that it was highly restricted.
Review Recipient Citizenship Status

This report allows you to determine if a student is a US citizen or permanent resident or if he or she is an international student.

- Input a list of KUIDs. You can choose to review the report in a new web browser tab or you can export to Excel or a .csv file.
- Students who are listed as Alien Temporary need to be sent to Financial Aid & Scholarships on International Posting forms so that Student Account Services can collect the needed GLACIER paperwork for potential tax treaty analysis.

FA Student Contact Information

This report allows you to find the phone numbers, email addresses and mailing addresses for students.

- Input a list of KUIDs. The report will automatically give you some default fields. You can select additional fields you want to find. Please note that you have access to two mailing addresses: permanent and jayhawk. Students have the ability to update these in Enroll & Pay.
- The report is set to default to export to a .csv file so that cells with a lot of characters won't be truncated.

Review Scholarship Candidate Detail

Starting with the 2017-18 award year, students are now able to file FAFSAs starting on October 1 rather than January 1. Financial Aid and Scholarships knows earlier in the award cycle than in previous years if a student has filed a FAFSA and the student’s Expected Family Contribution (EFC.) However, we cannot provide our long-standing need analysis report until we start packaging federal financial aid, which at this time is still occurring in March (although that may move up in future award years.) This report provides some detail in advance of a full need analysis.

- Input a list of KUIDs. The report indicates if a student has filed a FAFSA for the upcoming award year. If the FAFSA is on file, and it is complete, you will receive the Expected Family Contribution (EFC) as well as FAFSA filing date.
- Other information is also available to be added to the report. It can provide program/plan, residency, email address as well as current, prior and future term GPA and hours.
- Knowing if a student has filed a FAFSA and learning their EFC may help you make earlier decisions about if students will receive your scholarships, particularly those that may consider need. Keep in mind that we cannot assure you of a student’s full financial need picture until after we have packaged other financial aid. After packaging, you would know a student’s Cost of Attendance (COA), EFC and other gift aid. Until packaging is complete, we would be unable to confirm if you could post a need-based scholarship with certainty.