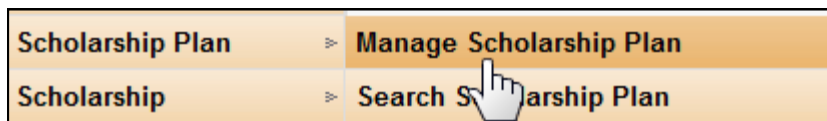


OSU Scholarship System—How to add a new Scholarship Plan

- 1) Login and locate the Foundation System page.



- 2) From the left hand side, hover over Scholarship Plan and select Manage Scholarship Plan.



- 3) Enter the Scholarship Name, Detail Code or Index, if known. Otherwise enter a percent sign (%) in one of the three boxes and click search. This search will populate the entire list of scholarships you manage.

OSU Scholarship Payment Plan Management

Please enter the desired criteria to query a list of scholarship p character.

Scholarship Name:

Detail Code:

Index:

Show existing plans only:

Search Results:

Index	Detail Code	Scholarship Title
FS0170	16H2	Loosley Schl/Engineering
FS0170	16H3	Callahan Schl/Engineering
FS0170	16H4	Laine Schl /Engineering
FS0170	16H5	FIRST Undergrad/Engineering
FS0170	16H6	John Naylor Fellowship/Eng
FS0170	16H7	Rickert Eng Fellowship/Eng

- 4) From the list, select the scholarship for which you want to build a new plan. There are three columns with fiscal years—Prior, Current and Future. Select by clicking on the icon in the column for the year of the plan.

Search Results:

Index	Detail Code	Scholarship Title	2012	2013	2014
FS125H	21D7	Zenhtbauer/Design&Hum Env			
FS125H	21G5	Cecelia Schuttleworth/D&H Env			
FS125H	21M6	Granite-Meyer/COB			

- 3) *The icons identify the type of action permitted. For this example, the Create Icon is displayed.*

5) The OSU Scholarship Payment Authorization Window opens.

OSU SCHOLARSHIP PAYMENT AUTHORIZATION	
Scholarship Name:	Zenhtbauer/Design&Hum Env
Detail Code:	21D7

6) In the Foundation Account section, enter a valid Project ID. If the Project ID box is set to gray (like the Title box below), you cannot change it for the fiscal year. If the Project ID box is open (as demonstrated below), you will need to enter a valid Project ID.

NOTE: Contact the OSU Foundation for Project ID if unknown.

Foundation Account	
Project ID:	<input type="text"/>
Title:	<input type="text"/>

7) Next in Authorization Information section, select a signer from the drop down box.

Authorization Information	
Preferred Signer:	<input type="text" value="List of Names Here"/> <input type="button" value="v"/>

8) From Requirements, select the enrollment level from the drop down list. The default value is FULL.

Requirements	
Level of Enrollment required for funds paid on less than full time:	<input type="text" value="FULL"/> <input type="button" value="v"/>
	<ul style="list-style-type: none">FULL3/4x1/2x1/4x

9) There are two ways to enter the scholarship award recipient information, individual manual entry or spreadsheet entry.

Recipient Information	
To add a recipient, enter a valid OSU ID and click the Lookup button, then confirm and click the Add button.	
OSU ID:	<input type="text"/> <input type="button" value="Lookup"/>
Full Name:	<input type="text"/>



Manual Entry of Scholarship Award Recipient Information

- Enter the OSU ID number for award recipient and click Lookup. If the OSU ID is valid, the name will appear in the Full Name box. **Click Add.**

recipient, enter a valid OSU ID and click the L

OSU ID:

Full Name:

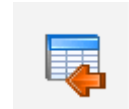
- The recipient information appears in a table. Enter the award amount for each of the four terms.

ID #	Full Name	Summer 2012	Fall 2012	Winter 2013	Spring 2013	Total Award For Year
x		\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$0.00
TOTAL:		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

- Repeat** this process for each additional award recipient.

Spreadsheet Entry of Scholarship Award Recipient Information

- Click on the spreadsheet icon located in the lower right hand side of the window. The following window will display.



Import Scholarship XLSX File

Only Excel file conforming to this [template](#) is supported.

XLSX File:

- A special Excel template is required for this spreadsheet entry. A Template link is provided in the window. You can use this template directly or cut and paste the required information from your own spreadsheet. The Scholarship Import Spreadsheet window opens.

Import Scholarship XLSX File

Only Excel file conforming to this [template](#) is supported.

XLSX File:

Opening Scholarship_Import_Spreadsheet.xlsx

You have chosen to open

Scholarship_Import_Spreadsheet.xlsx
which is a: Microsoft Excel Template (10.3 KB)
from: https://bfpsystems.oregonstate.edu

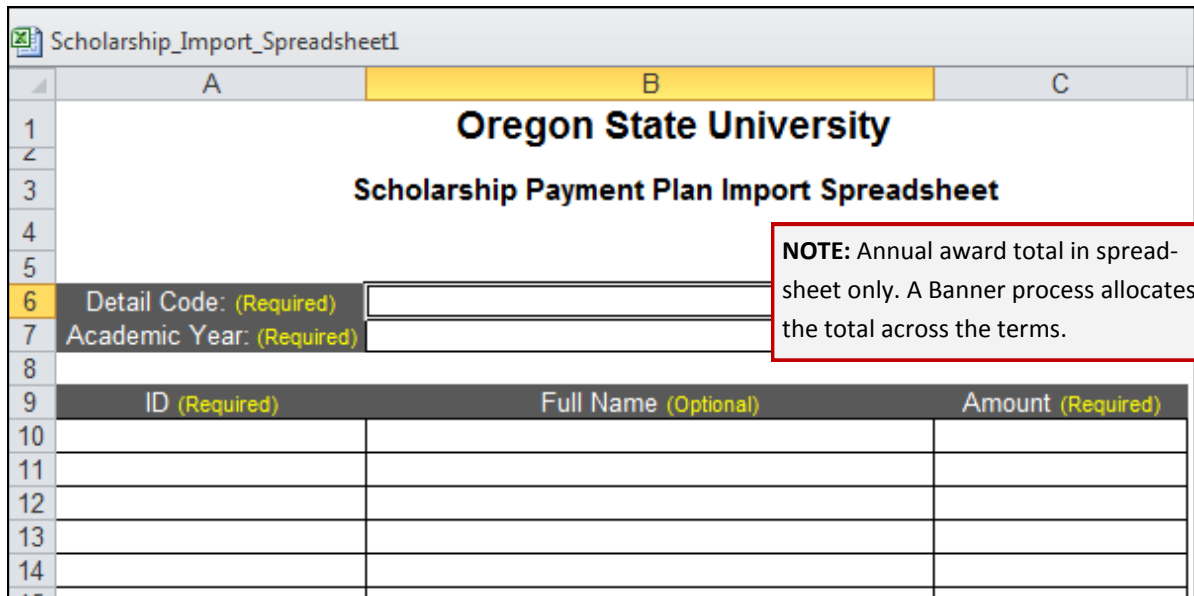
What should Firefox do with this file?

Open with: Microsoft Excel (default)

Save File

Do this automatically for files like this from now on.

Below is a sample of the Scholarship Import Spreadsheet.



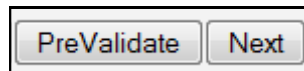
	A	B	C
1	Oregon State University		
2	Scholarship Payment Plan Import Spreadsheet		
3			
4			
5			
6	Detail Code: (Required)	<input type="text"/>	
7	Academic Year: (Required)	<input type="text"/>	
8			
9	ID (Required)	Full Name (Optional)	Amount (Required)
10			
11			
12			
13			
14			

NOTE: Annual award total in spreadsheet only. A Banner process allocates the total across the terms.

- Next locate the scholarship recipient spreadsheet you want to import. Click Upload.
- If errors appear in the spreadsheet, they will need to be corrected before trying to upload again.
- If the spreadsheet is free of errors, it will import into the scholarship form.

10) After the award Recipient Information is complete, you have the option of adding a note in the available box.

11) Click the PreValidate button to validate the recipient(s) against the current Banner scholarship rules. This step is optional.



12) Click Next.

13) A confirmation page appears. Review your information for accuracy. If correct, click the SUBMIT button to forward the new scholarship plan to the signer.

Additional Information and Helpful Hints:

- Once a Scholarship Plan has been authorized, the Project ID used will be assigned to the Detail Code for that fiscal year. In order to change the Project ID, a new Detail Code must be requested.
- A **SAVE** button may appear on the conformation page for a newly created Scholarship Plan. This option allows the Scholarship Plan to be saved in DRAFT status, permitting revisions to the plan prior to authorization. The Scholarship Plan is sent the to the signer only after you click **SUBMIT**.
- A red **X** appears next to a recipient's name for easy removal from the Scholarship Plan. If the red **X** does not appear, the award was previously registered in Banner and cannot be removed. In this case, you will need to zero the award amount(s) in order to reverse payment and re-submit for approval.