

University of Kansas Scholarship Datamart Users Guide Last Updated: September 2022

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) and has evolved through the help of Analytics, Institutional Research, & Effectiveness's (AIRE).

The Scholarship Datamart is a tool housed within Oracle Analytics Tool (OAC) [formerly known as 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
- Review scholarship recipient data
- Search for eligible scholarship recipients 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

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/info-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 Missy Somers at malissasomers@ku.edu or 864-2044.

For assistance with scholarship postings or disbursement issues, please email scholaward@ku.edu.

For more technical assistance or additional training on OAC, please send an email to AIRE-help@ku.edu. This will create a help ticket and a member of the AIRE team will be in touch as soon as possible.

Cross Walk Links for additional support from AIRE:

PDF:

<https://kansas.sharepoint.com/:b:/t/teamadmin/EamQn1N3XfhFl3BQgyYH3woBvRxFr4vNwnrom97Hy0JXUw?e=vdVPqI>

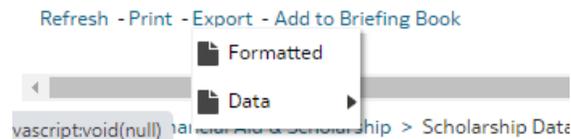
Excel:

<https://kansas.sharepoint.com/:x:/t/teamadmin/EYdB2hbPHDhr0Y78sKCKwEBQhFoEZW0NK8sfb9qEtQFyw?e=Tg7q9R>

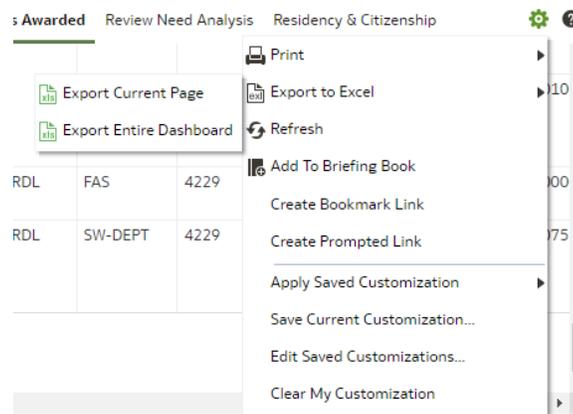
Logging into the Scholarship Datamart

Log into OAC by visiting: <https://oac.ku.edu/analytics> or by going to <https://aire.ku.edu/> and from the menu option on the left select 'Tools->Oracle Analytics Tool (OAC)' which will prompt you to sign in using your KU credentials.

How to Export Data from the Scholarship Datamart



To export a report you have generated, click the 'Export' option from the list of buttons at the bottom of the report you've just ran. Then select from one of the following options pictured below. Once selected, a downloadable report will generate and then be added to your list of downloads in your browser where you can open and save it.



If you have problems with exporting from your browser, check if your browser requires that you add OAC to your trusted sites (Internet Explorer) or check your pop-up settings before contacting IT staff for assistance.

CURRENT SCHOLARSHIP MANAGEMENT TILES AVAILABLE:

Note: Scholarship Spending by Business Unit now has their own tile next to Scholarship Datamart

Scholarship Datamart

Search for scholarship and awards recipients by department, Emplid and fund.

Scholarship Datamart Search Scholarship Candidate Detail

Scholarships Awarded Review Need Analysis

Residency & Citizenship

Scholarship Spending by Business Unit

View spending details with a focus on identifying underspent funds.

Scholarship Spending by Business Unit

Scholarship Identification Criteria

CURRENT SCHOLARSHIP MANAGEMENT REPORTS AVAILABLE:

Scholarships Awarded:

Scholarship Datamart Search Scholarship Candidate Detail **Scholarships Awarded** Review Need Analysis Residency & Citizenship

Scholarships Awarded

University of Kansas - All Campuses
Source: Scholarship Eligible Students
Daily Data Refresh by: 8:00 AM



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Select Filter Criteria

Aid Year Student ID Academic Career Department Item Type Item Type Name

***You now have the option to search for funds awarded all in one place!*

Use this report to view the complete scholarship award history for by student ID, career, department, or item type name/number by entering the relevant information from the drop down function (or use the pencil to search).

- You are then presented with your list of funds. Each row lists aid year, student ID number, academic career, student name, evaluation term, GPA, hours taken, item type number and name, and the fiscal information (e.g., total awarded/disbursed, most recent disbursement date, Fall and/or Spring awarded/disbursed). You can use this information to determine if the recipient has received their allocated amounts or whether funds may need to be forced/canceled due to insufficient hours and/or GPA.
 - View only one year or view multiple years in the same report.
 - View only one department or view multiple depts in the same report.
 - 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 evaluated.
- While you can view the results in a Web browser, 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. See the list of options above regarding formats to download your report.

The more years, departments and funds you ask to see in one report, the longer it will take to run

Review Scholarship Candidate Detail

Scholarship Datamart Search **Scholarship Candidate Detail** Scholarships Awarded Review Need Analysis Residency & Citizenship

Scholarship Candidate Detail

University of Kansas - All Campuses
 Source: Scholarship Eligible Students
 Daily Data Refresh by: 8:00 AM

^ Select Filter Criteria

Aid Year Student ID

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. 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 selected 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 on 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.**

Review Recipient Citizenship Status

Scholarship Datamart Search Scholarship Candidate Detail Scholarships Awarded Review Need Analysis **Residency & Citizenship**

Residency and Citizenship

University of Kansas - All Campuses

Source: Scholarship Recipient Citizenship Status

Daily Data Refresh by: 8:00 AM



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Select Filter Criteria

Student ID Residency Citizenship Description

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.

- Students who are listed as Alien Temporary need to be sent to Financial Aid & Scholarships (FAS) on International Posting forms so that Student Account Services (SAR) can collect the needed GLACIER paperwork for potential tax treaty analysis. *Funds cannot be posted to the student's account until this process has been completed and SAR has notified FAS funds can be released.*

Review Need Analysis by KUID

Review Need Analysis

University of Kansas - Lawrence Campus
Source: Scholarship Needs Analysis
Daily Data Refresh by: 8:00 AM



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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

Students who have not filed a FAFSA or International Student Need Analysis Worksheet or who have an incomplete FAFSA or ISNAW cannot have need analyzed. In addition, FAFSA filers must also have already been packaged with federal financial aid to have their need analyzed. Students who are incomplete for one of these reasons will show up with all values blank.

For assistance with understanding need analysis, contact Financial Aid and Scholarships.

Select Filter Criteria

Aid Year Student ID

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 after the Financial Aid and Scholarships office has begun awarding.

- Paste in a list of KUIDs.
- While you can view the results in a Web browser, 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 FAFSA 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 Datamart Search

[Scholarship Datamart Search](#) [Scholarship Candidate Detail](#) [Scholarships Awarded](#) [Review Need Analysis](#) [Residency & Citizenship](#)

Scholarship Datamart Search

University of Kansas - Lawrence Campus

Source: Scholarship Eligible Students

Daily Data Refresh by: 8:00 AM

4 Select Filter Criteria

Aid Year	--Select Value--	Student Academic Career	--Select Value--	Item Type	--Select Value--	
Student ID	--Select Value--	Department Item Type	AA STUDIES	Item Type Name	--Select Value--	
					<input type="button" value="Apply"/>	<input type="button" value="Reset"/>

Option 1: Search for Eligible Recipients by Department

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.

- 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.
- Select the department of your choice
- From the list of funds, select those you wish to query. You can search by Item Type number or name. 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 show you residency status, term evaluated, total hours enrolled for that term, financial aid detail and fund eligibility detail by default.
- While you can view the results in a Web browser, 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.

Option 2: Search for Eligible Recipients by KUID and Fund

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 in to cross-check against the funds you have available to use on those commitments.

- Select the KUIDs you want to cross check.
- Select the department of item type to be evaluated
- You can search by Item Type number or name. 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 show you residency status, term evaluated, total hours enrolled for that term, financial aid detail and fund eligibility detail by default.

- While you can view the results in a Web browser, 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.

Scholarship Fund Information

University of Kansas - Lawrence and Edwards Campuses
 Source: Scholarship Balances & Current Recipients
 Daily Data Refresh by: 8:00 AM

Select Filter Criteria

Aid Year Department Name Item Type & Name IFAS Number Need Based

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

- Start by choosing which aid year you wish to find funds for. Next select your department. Last, 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.

Scholarship Spending by Business Unit & Fund

Scholarship Spending by Business Unit Scholarship Identification Criteria



Scholarship Spending by Business Unit



University of Kansas - Lawrence and Edwards Campuses

Business Units can be academic programs or other business offices at KU. Financial Aid and Scholarships (FA3) groups scholarship funds for each business unit using a Keyword3 fund attribute. This attribute matches up closely in most cases with familiar business unit/department designations. Please pay special attention to the Percent Unspent Column. The primary purpose of these reports is to help you identify underspent funds.

Select filters to limit your search:

Select any (or none) of these filters to limit your results to that selection.

Aid Year Business Unit Business Unit Label IFAS Number Item Type Name Item Type

Drill down by Item Type Scholarship Identification Criteria

Aggregate/Disaggregate Results

For aggregation or disaggregation by Keyword3/Business Unit Label Type and/or Item Type and Name, make the choice in these boxes:

Aggregate by Bus. Unit Label? Aggregate by Item Type?

Aid Year	Business Unit	No Aggregation	No Aggregation	Projected	Awarded	Remaining	Disbursed	Percent Unspent	Cancelled	Declined	Awarded Count	Last Update Date
2021-22	Financial Aid & Scholarships			\$14,147,806	\$12,628,302	\$1,519,506	\$12,365,316	10.7%	\$1,232,699	\$11,000	5408	01/31/2022
Grand Total				\$14,147,806	\$12,628,302	\$1,519,506	\$12,365,316	10.7%	\$1,232,699	\$11,000	5408	

Refresh - Print - Export - Add to Briefing Book

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.