



JagSPOT Opportunity Administrator User Guide

This guide will assist you with all parts of the awarding and approval processes in JagSPOT powered by Scholarship Universe.

Office of Scholarship Services

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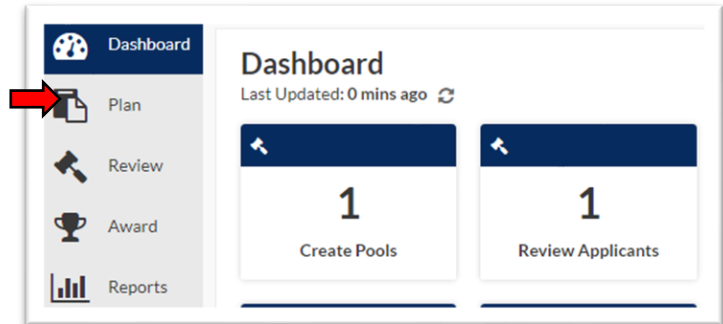
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JagSPOT Understanding A Scholarship's Settings

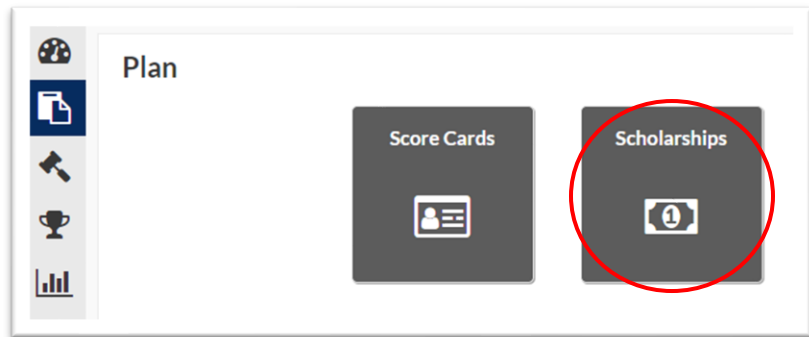
This guide will assist with locating and understanding the features of scholarships within JagSPOT.

1. To locate a scholarship under your pervue in JagSPOT, start by clicking on *Plan* in the left hand navigation portal.

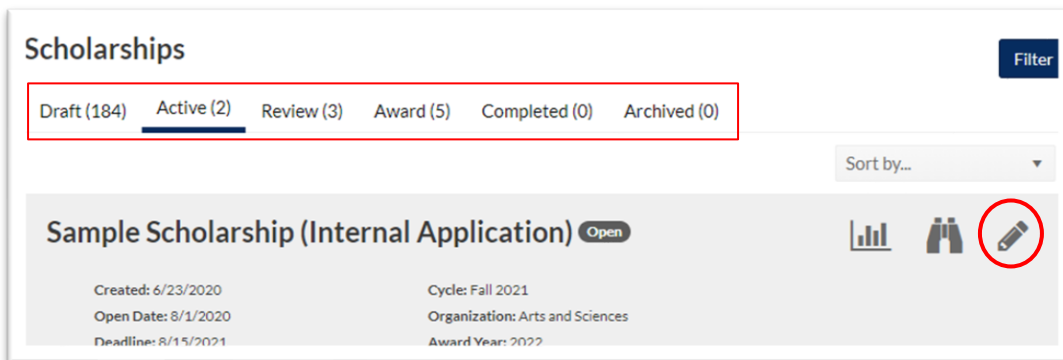


2. Once you have arrived on the *Plan* page, select the *Scholarships* tile.

If you will be using rubrics while reviewing applications in JagSPOT, you can review and edit them by selecting the *Scorecards* tile.



3. The scholarship planning portal will now be visible. On this screen all of the scholarships you oversee will appear in the tab corresponding to their current status.



Draft: Award is not visible to students, can still be edited.
Active: Award is open and available for students to apply to.
Review: Award application period has ended and is ready for review and awarding.
Award: Award is ready for awarding.
Completed: Award has been awarded for this award year.
Archived: Award listings from previous award years.

4. Once the correct scholarship has been identified, click on the *Pencil* icon to access it.
5. On the scholarship detail view there are various fields to consider.

Scholarship Page Fields:

General: Details of current scholarship settings.

Matching: Criteria students need to meet to be able to view the scholarship.

Candidates: List of students who have applied or who meet matching criteria if no application.

Awards: List of students who have been awarded this aid year.

General details: Scholarship name and basic organizational details.

Application Method: Direct Award (previously auto-match or faculty nominated), Internal Application (previously conditional applications), Internal Application Continuous Awarding (conditional application that can be awarded on a rolling basis).

Total Amount: 999 will appear as a placeholder until endowment reports come out in January.

Amount Displayed: Displayed to the student when they view the scholarship

Description: Description of award that is visible to students when they view the scholarship.

Sample Scholarship (Internal Application) : Open

General Matching Candidates Awards

Scholarship Information

Name: Sample Scholarship (Internal Application)

Organization: Arts and Sciences

Department: Select an item...

Cycle: Fall 2021 Open Date: 8/1/2020 Deadline: 8/15/2021

Application Method: Internal Application

Application: Mitchell College of Business Conditional Scholarship Application

Donor: Financial Aid Office

Award Year: 2022

Terms: 202210

Max Applicants:

Acceptance Required: YES

Thank You Required: YES

Approval Required: NO

Award Approval Required: YES

Thank You Template: Generic Department non renewable signed Dept Head

Display Contact Info: Select an item...

Fund Code: SRA01

Alternate Codes:

Total Amount: 99

Shared Amount: NO

Max number of Awards: 99

Amount Displayed: Varies

Renewable to Student: NO

Notify of Award Loss: NO

Public Scholarship: NO

Description: This scholarship was created to assist a student with their tuition charges. You must have a 3.0 institutional GPA to apply.



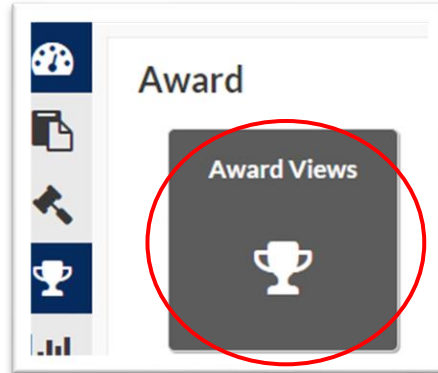
JagSPOT Creating an Award View

This guide will assist you with setting up a new tool for the awarding process for your scholarships. *Award Views* are customizable groupings that allow the awarder to view, rank, and sort all applicants who are eligible to receive an award. These views are unique to the individual awarder.

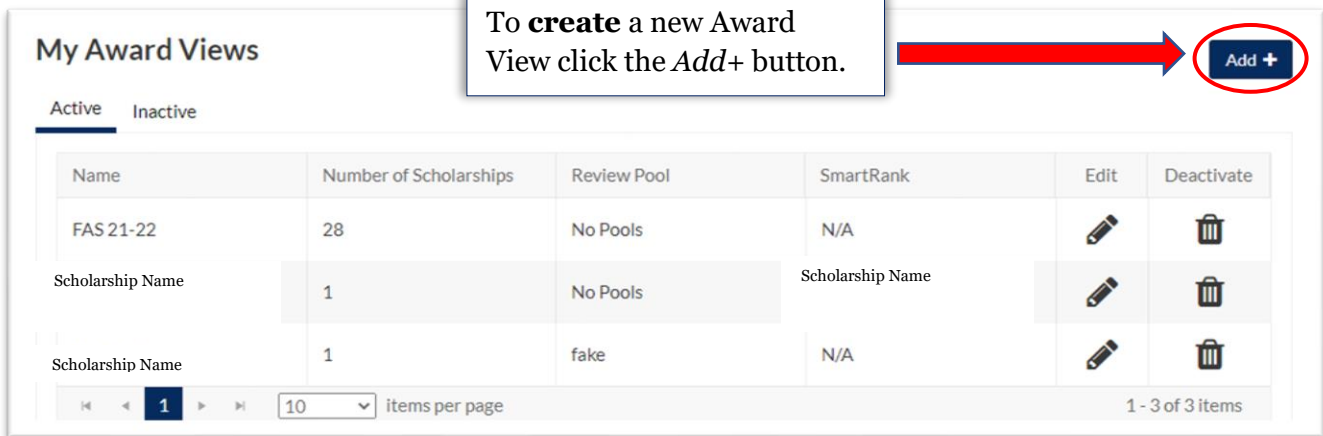
1. To begin awarding scholarships, create a unique award view to manage the awarding process through. Select *Award* from the left-hand menu and then the *Award Views* tile.

This will show a list of previously created award views.

Award views are individual to the user so you can customize them however you want.

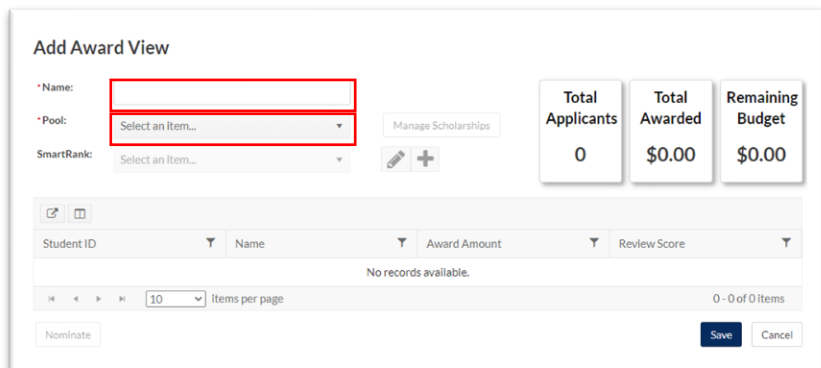


To **create** a new Award View click the *Add+* button.



2. First, name the award view. These views can be used for multiple cycles so name it something identifiable.

Next, select the specific pool this view is for (if you are reviewing as part of a pool committee) or select *No Pools* if you are awarding individually.



If *No Pools* selected, a list of possible scholarships will be generated to choose from. Use the filters to identify scholarship(s) to be included in the award view.

Use the check boxes to include them in your award view and press save.

Select Scholarship(s): Scholarships Selected
0

<input type="checkbox"/>	Scholarship	Organization	Department	Award Year	Number of Applicants
<input checked="" type="checkbox"/>	Scholarship Name	Training		2122	5

Add Award View

Name:

Pool:

SmartRank:

Manage Scholarships ✎ +

Total Applicants	Total Awarded	Remaining Budget
0	\$0.00	\$0.00

Student ID	Name	Award Amount	Review Score
No records available.			

10 items per page 0 - 0 of 0 items

Nominate Save Cancel

If you would like to use a *SmartRank*, you can select it from the drop-down menu.

To create a new *SmartRank*, click on the Plus button. See *SmartRank* guide for more detailed instructions.

3. The award view now shows a list of students who are eligible for the award and is ready to begin awarding.

If you need to nominate a student who has not applied for the scholarship you can do that by clicking the Nominate button and entering the student's Jag number.

EDIT AWARD VIEW

Name: Scholarship Name

Pool: Scholarship Name

SmartRank:

Manage Scholarships (1/1) ✎ +

Total Applicants	Total Awarded	Remaining Budget
1	\$0.00	\$9,999.00

Student ID	Name	Award Amount	Review Score
J00450930	Autumn Courtney	\$0.00	100

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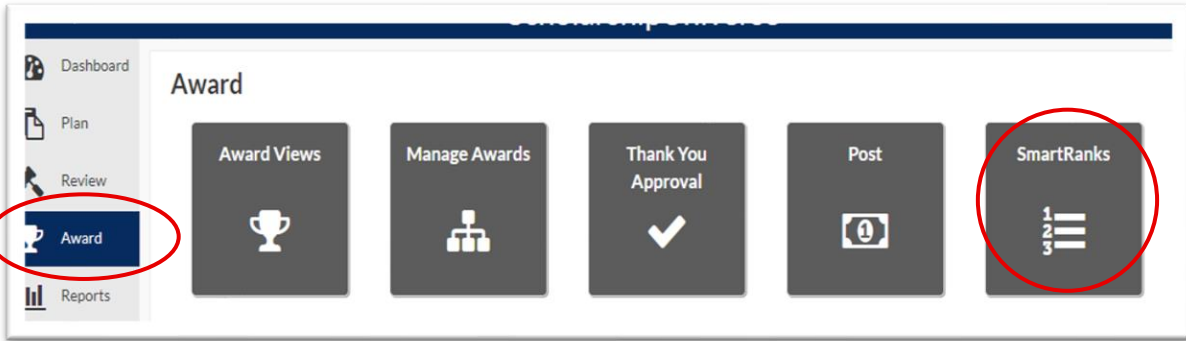
Nominate Save Cancel



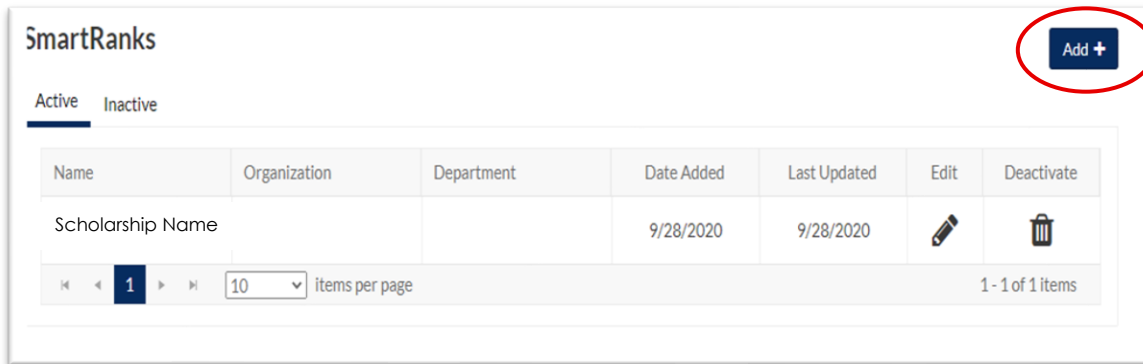
JagSPOT Using SmartRanks

SmartRanks are used to rank applicants who already meet the matching requirements of a scholarship using multiple criteria. This feature allows committees to quickly see a stack ranking of candidates and eliminate inconsistency in awarding. *SmartRanks* can be predefined as outlined below or can be created or updated during awarding in the Award View screen. When applied, the *SmartRank* will create a weighted numeric score for each candidate and an ordinal ranking for each that can be sorted or filtered on in the Award Views screen.

1. Login to JagSPOT and select *Award* on the left-hand navigation bar, followed by the *SmartRanks* tile.



2. To create a new *SmartRank* select the *Add+* button.



3. From here, users are able to search for application questions and Banner student data such as institutional or High School GPA, SAT/ACT scores, or residency.

As requirements are added to the *SmartRank*, users will assign weights in relation to other requirements. These percentages must equal 100%.

Non-numeric factors can also be added into the *SmartRank*, such as residency description or major. To do this, select the requirement, then select the operator (equal to, any of these, none of these) and assign an amount value.

- Once a *SmartRank* has been created it can be used for any scholarship under review. To implement the newly created *SmartRank*, navigate back to the scholarship in the *Plan* tab. Then select the *Candidates* tab and use the drop-down menu to select the *SmartRank*.

- Once the *SmartRank* has been selected, the applicants will be reordered to reflect the values in the *SmartRank*. From here, the application materials can be viewed using the *Binocular* icon and they can be forwarded for awarding using the \$ icon.

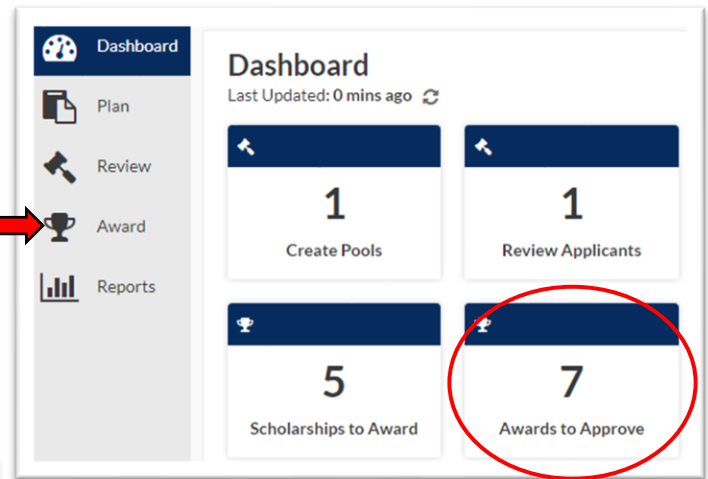


JagSPOT Approving Awards

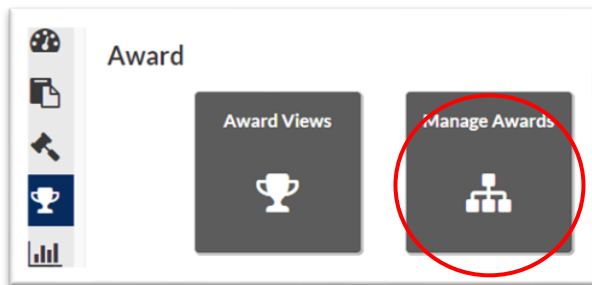
This guide will assist Opportunity Administrators with the approving awards as the final step in the awarding process.

1. Once the committee chair has allocated award funds to students in JagSPOT, Opportunity Administrators must provide final approval in JagSPOT before students will be notified of their award. To do this, log into JagSPOT using your single sign on.

2. The first screen will be your dashboard of quick links. You can access the awarding portal two ways:
 - a. Selecting the *Award* tab on the left hand navigation bar.



- b. Clicking on the *Awards to Approve* quick link. *This will take you directly to step 4.*



3. After selecting *Award* another screen will appear with several options. Select the *Manage Awards* tile.

4. Once in the *Manage Awards* portal all students whose awards need to be approved will appear.

Manage Awards

Approve Cancelled Completed

All Pools: All Organizations: All Award Years:

All Scholarships: All Departments: All Tags:

Search Student ID: Search Name:

Approve Deny

<input checked="" type="checkbox"/>	Student ID	Name	Award Amount	Scholarship †	Award Year	Review Pool	Organization	Department	Tags
<input type="checkbox"/>	J00678829	Miss Pawla	\$100.00	John Smith Endowed Scholarship	2022	Reports	Arts and Sciences	General	
<input checked="" type="checkbox"/>	J00678829	Miss Pawla	\$100.00	USA Jaguar Scholarship Direct Award	2021	No Pools	Arts and Sciences	Dean's Office	
<input type="checkbox"/>	J00580582	South Paw	\$100.00	USA Jaguar Scholarship Direct Award	2021	No Pools	Arts and Sciences	Dean's Office	

- a. To approve *all* students on the list: click on the top check box and then select the *Approve* button.

- b. To approve *some* students on the list: click on the check box next to their names and then select the *Approve* button.

Manage Awards

Approve Cancelled Completed

All Pools All Organizations All Award Years

All Scholarships All Departments All Tags

Search StudentID

Search Name

Approve Deny

<input type="checkbox"/>	Student ID	Name	Award Amount	Scholarship ↑	Award	Review Pool	Organization	Department	Tags
<input checked="" type="checkbox"/>	J00678829	Miss Pawja	\$100.00	John Smith Endowed Scholarship	2022	Reports	Arts and Sciences	General	
<input type="checkbox"/>	J00678829	Miss Pawja	\$100.00	USA Jaguar Scholarship Direct Award	2021	No Pools	Arts and Sciences	Dean's Office	
<input type="checkbox"/>	J00580582	South Paw	\$100.00	USA Jaguar Scholarship Direct Award	2021	No Pools	Arts and Sciences	Dean's Office	

c. To deny awards: click on the check box next to the name of the student and then select the *Deny* button.

If you will be approving a large number of distinct awards at once, the drop-down menus can be used to filter the number of awards and students visible at one time.

- Once all awards have been approved, the awarding process is complete. If you need to track student progress on the post acceptance process, you can view a list of students who have accepted their awards by clicking on the *Completed* tab.

Manage Awards

Approve Cancelled Completed

All Pools All Organizations All Award Years

All Scholarships All Departments All Tags

Search StudentID

Search Name

Approve Deny

<input type="checkbox"/>	Student ID	Name	Award Amount	Scholarship ↑	Award Year	Review Pool	Organization	Department	Tags
<input type="checkbox"/>	J00678829	Miss Pawja	\$100.00	John Smith Endowed Scholarship	2022	Reports	Arts and Sciences	General	
<input type="checkbox"/>	J00678829	Miss Pawja	\$100.00	USA Jaguar Scholarship Direct Award	2021	No Pools	Arts and Sciences	Dean's Office	
<input type="checkbox"/>	J00580582	South Paw	\$100.00	USA Jaguar Scholarship Direct Award	2021	No Pools	Arts and Sciences	Dean's Office	

If you would like to keep a list of awarded students for your records, a grid view can be exported on this screen by clicking the *Export* icon.



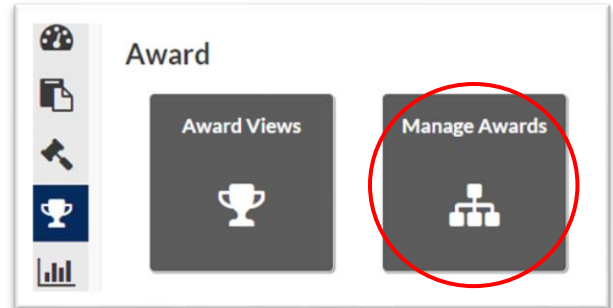
JagSPOT Canceling Offered Awards

This guide will assist you with canceling awards in various stages of the awarding process. Once awards have been offered, they can be canceled so long as the award term has not yet started.

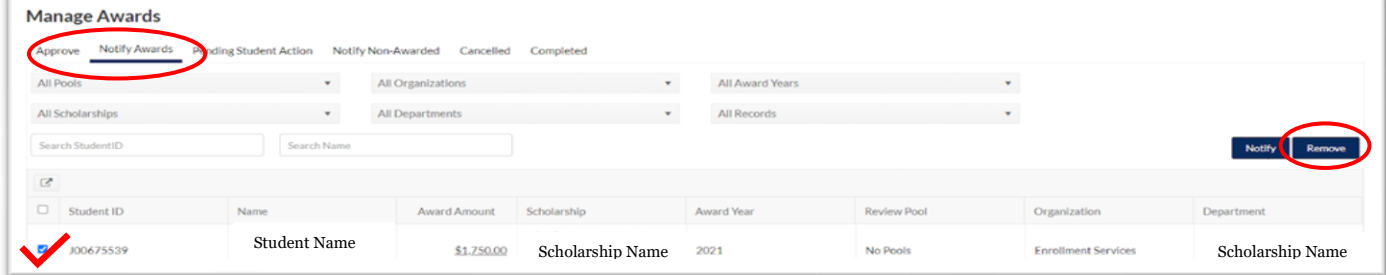
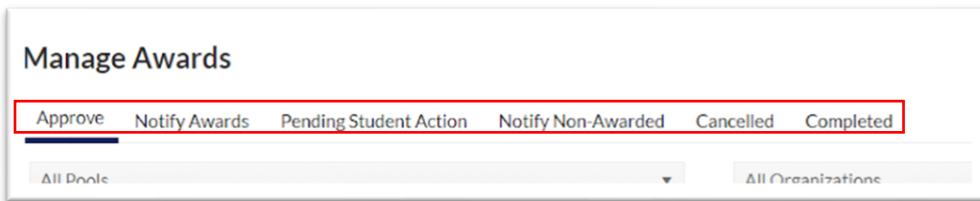
1. To cancel or rescind an offer navigate to the *Manage Awards* tile of the *Award* section.

This will bring up the *Manage Awards Portal*.

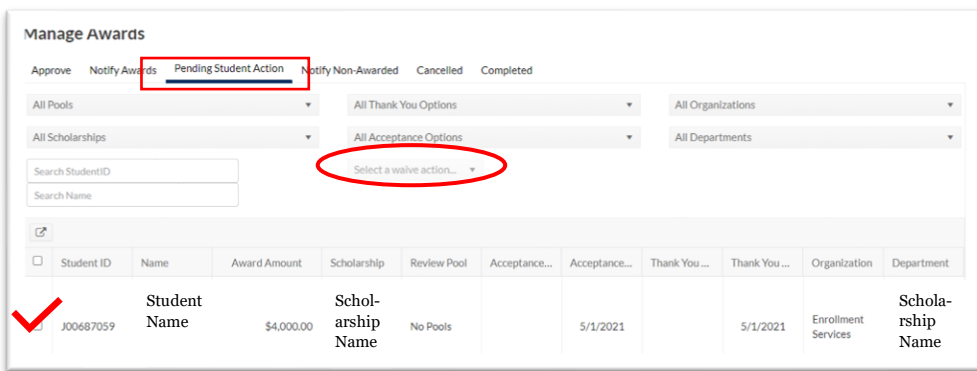
2. From here you can see which students have been awarded and what stage they are at in the awarding process. From this portal, awards can be removed from students at several stages.



Students whose awards are in either the *Approve* or *Notify* tabs can be canceled by checking the box next to the student's name and then selecting the *Remove* button.



Students whose awards are in the *Pending Student Action* tab can have their awards removed by checking the box next to the student's name and then navigating to the *Select a waive action* drop-down menu and selecting *Remove Awards*.



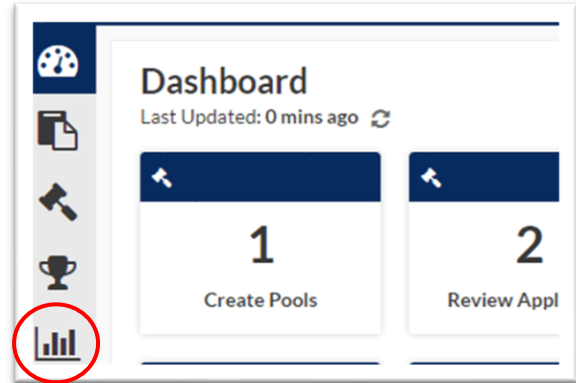
3. If a student's awards have already been pushed to Banner and they appear in your *Completed* tab, you will need to contact the Office of Scholarship Services with the name and Jag Number of the student whose award you wish to remove.



JagSPOT Pulling Reports

This guide will assist you with the pulling of reports in JagSPOT. Reports can be used to access information about your scholarships, applicants, and potential applicants.

1. To begin pulling a report, use your single sign on access JagSPOT.
2. Next, select the Reports section on the left-hand navigation bar.



to

3. First, name the award view. These views can be used for multiple cycles so name it something identifiable.

Internal Application

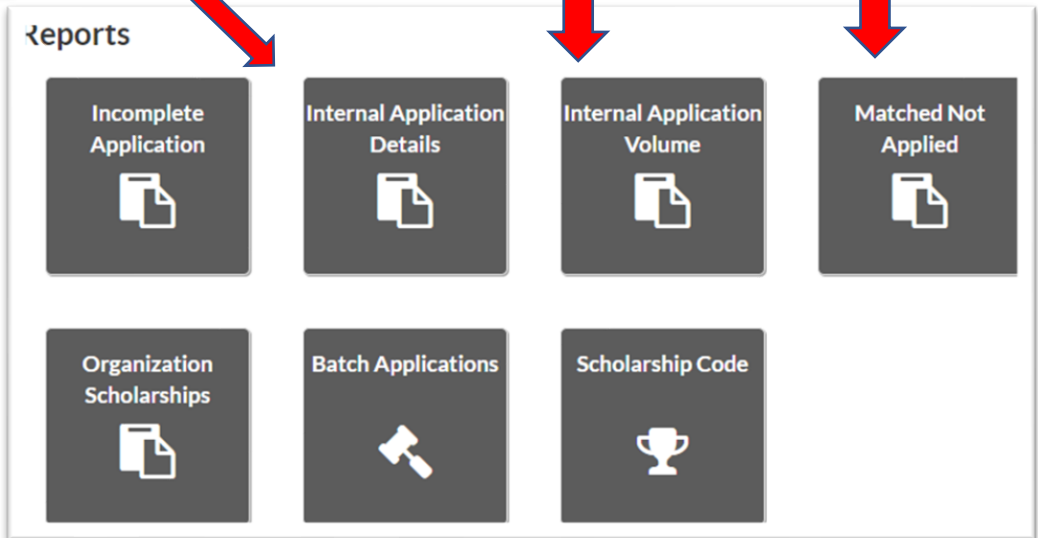
Details: A list of students who have submitted an application to at least one scholarship in a given organization or department.

Internal Application

Volume: A list of scholarships applied to that use specific questions for matching criteria.

Matched Not Applied:

A list of students who have matched to a scholarship but have not started the application process.



Incomplete

Application: A list of students who have started but stopped the application process.

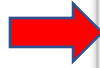
Organization Scholarships: A list of scholarships by award year, organization and department with the amount budgeted and the amounts awarded.

Batch Applications: A list of all review applications associated to the review pool. Please note that all applications will be batched together.

Scholarship Code: A list of the total dollar amount and number of awards per scholarship code.

4. After selecting the appropriate report tile, a window will pop up asking for specific parameters for the report. Enter these fields to locate the desired information then press the *Submit* button.

If you ever forget what information a report pulls, the popup window will give you a brief summary.



Matched Not Applied Reporting ✕

Enter the following criteria to generate a CSV file containing the students who have matched to a scholarship but have not started the application process.

Award Year
Select... ▾

Organizations

Scholarships

5. JagSPOT will now send a copy of the report to your JagMail.