

Banner 9

ZSPSCMO – Foundation Scholarship Memos

This process will read a comma-delimited file (.CSV) provided to you from your Foundation Office and depending on the mode that the process is run in, it will create or update FOUN memos based on the balance of what is in the file. **ZSPSCMO is run for one semester at a time.**

Colleges that choose to use this process CANNOT run TSRTBIL until you are ready to verify totals and apply credit. Doing so will overstate available funds in TSAAREV by adding SC% memos on top of FOUN memos. Colleges will also need to update memos as soon as possible after applying credit.

A population selection (popsel) can be used with this process. Only the students in the popsel are considered.

This program will also list any students that have a FOUN in banner for the term, but are not in the foundation file. In UPDATE mode, the memo for the students on this list will be expired.

FOUN detail code MUST be created on TSAETC BEFORE you run this process. The FOUN detail code should NEVER be placed on the students TSAAREV account. This detail code is only used for memo purposes!

On the landing page enter ZSPSCMO, then press enter.

Search Direct Navigation

zspscmo

FOUN MEMO RECON (ZSPSCMO)

In Process Submission select **Go**

Process: ZSPSCMO Parameter Set: Go

In the Printer Control Section – Enter **Database**

Alt Page Down to go to next section or click on the down arrow at the bottom of the page.



Enter your Parameter Values. Each Parameter is defined in red.

Number *	Parameters	Values
01	Term Code	Enter Term Code you wish to process
02	File Name	Enter File Name to process upload via GUAUPLP first
03	Expiration Date	Enter the Expiration Date for the new memos (DD-MON-YYYY)
04	Update (Y/N)	Audit or Update? Y - Update Memos, N - Audit Only
05	Selection Identifier	
06	Application Code	Optional Population Selection can be used. All students in the pop sel would be considered. All Four Parameters are required when using the pop sel option.
07	Creator Id	
08	User	
09	Enter Lines per Page	Enter lines per page (defaults to 55)

ZSPSCMO Outputs

There will be a log and lis file. They are located in /u02/jobsub/PROD/gurjobs directory on your Banner box.

After you have entered your parameters **Alt Page Down** to go to next section or click on the down arrow at the bottom of the page.



Press F10 to save or select the SAVE button at the bottom right corner to run the process.



Once the process is run you will see informational message in the top right corner of your page. It will also identify the sequence number.

To view your .log and .lis file, click the RELATED tab at the top right of the page and then select Review Output [GJIREVO]

Click on the ... to view your .log or .lis file.

Your sequence number will be showing. (If the process is complete)

You will see your available files.

Select either your .log file or .lis file

Then click OK

Below is sample output information of your .log, and .lis file.

This example shows ZSPSCMO.log file

To go back and look at the .log file, click the Start Over button on the top right hand corner of the page.

[Start Over](#)

You can select your lis file to review.


This example shows ZSPSCMO.lis file

DATE: 03-SEP-2020		TCSG Pelican Group - PROD				PAGE: 1	
fountestfile.csv		Reconcile Foundation Scholarship Memos			(30-SEP-2020)	202016 UPDATE	
ID	NAME	FOUN	HRS	FLAG	BALANCE	AUTH/MEMOS	COMMENTS
910124681	Ayana Brown	363.00	3	NO	363.00	.00	No FOUN memo - ADD
910111750	AMY BABUSHKIN	438.00	4	NO	438.00	.00	No FOUN memo - ADD
910121701	CHRISTOPHER AARON	800.00	0		832.00	.00	No FOUN memo - ADD
910111960	JAMES ABERCROMBIE	50.50	0		.00	.00	No FOUN memo - ADD
fountestfile.csv		Reconcile Foundation Scholarship Memos			(30-SEP-2020)	202016 UPDATE	
Students with FOUN but not in the FOUN file:							
910124606	Nikita Minni		3	NO	143.00-	.00	NOT IN FILE - EXPIRED

NOTE: The BALANCE column contains the student balance for the term entered on parameter 01 and will include ALL balances that are not equal to zero. The Auth/Memos column includes all authorized aid or active memos **not including FOUN** that the student has for the term from parameter 01.

NOTE: The expiration date is updated to the date in parameter 03 **EACH TIME** the process is ran in update mode.

NOTE: The students in the Students with FOUN but not in the FOUN file section are students that have a FOUN in banner, but are not in the foundation file. In UPDATE mode, the memo for the students on this part of the list will be expired. Double check the students on this list **BEFORE** running in UPDATE mode. The expiration date on these will be the day **BEFORE** the run date. Example – if you run this process in UPDATE mode on 9/3/2020 the expiration date on the FOUN memos for these on the part of the list will be 9/2/2020.

If you click the X at the top left,  you will go back to Process Submission Control GJAPCTL – Process ZSPSCMO.

ZSPSCMO.lis - Informational/Error Messages:

No FOUN memo – ADD – displayed when no active FOUN memo exists for the term.

FILE AMT = FOUN – No Chg – displayed when the process is ran but FOUN memo balance = the amount in the file.

Plan Increase – update FOUN – displayed when the process is ran and the FOUN amount is less than the amount in the file.

Plan Decrease – update FOUN – displayed when the process is ran and the FOUN amount is greater than the amount in the file.

Suggested Steps:

Run this process when you receive a file from your foundation with scholarships for students.

Be sure to set your expire date to the DAY BEFORE pre-registration for the next term. This will allow you to protect them from getting purged during the term, but will allow them to expire before they register for the next term so that you are not protecting them in error.

Foundation File Layout:

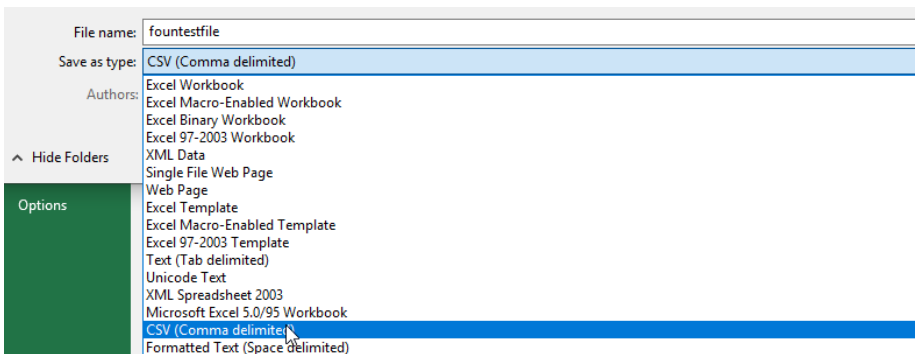
Your file must be in a csv format. The following columns are required: ID, Last Name, First Name, and Amount. The amount can be entered with or without decimals. Example: 363 OR 363.50 OR 363.5 **DO NOT INCLUDE COMMAS OR DOLLAR SIGNS.**

No Header should be added.

Your Foundation office will most likely give you an Excel spreadsheet, you will need to make sure that the spreadsheet has ONLY the columns listed above in the spreadsheet then you will save it as a .csv file.

	A	B	C	D	E	F	G
1	910124681	test1	goose	363			
2	910111750	test2	mavrick	438			
3	910121701	test3	johnny	800			
4	910111960	test4	baby	50.5			
5							
6							
7							

Save the spreadsheet as a .csv file:

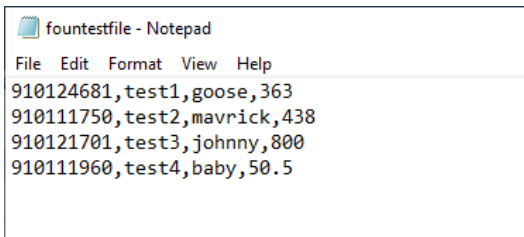


If you open the csv file, your data will be in a comma-delimited format.

The image shows a file explorer window with a list of files. The file 'fountestfile' is highlighted with a red box. The list includes:

File Name	Date Modified	File Type	Size
exceldata	8/11/2020 11:52 AM	Text Document	18 KB
fountestfile	8/17/2020 2:00 PM	CSV File	1 KB
fountestfile	8/17/2020 11:09 AM	Microsoft Excel W...	10 KB

Like this:



Then using the GUAUPLP process in banner, upload your file to the /dataload/general directory. Then you will be ready to run ZSPSCMO.

Enter this file name into parameter 02. The file name is case-sensitive and must include the .csv extension.

Note: Once you have run TSRTBIL in apply credit mode, you can subtract the funds used and create a new csv file to use to update your memos. If the balance in the csv is zero, and the student has an active FOUN memo, when run in update mode the FOUN memo will be expired.