



Welcome to  
GFS Tips & Tricks  
And  
ReportMart Smarts



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# Session Information

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- ◆ Instructors: Sarah Straight & Anh Hoang
- ◆ Questions
  - Hold questions until end of each section
  - Use the note cards to record questions
- ◆ Handouts



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# Agenda

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- ◆ Entry
- ◆ Approval
- ◆ Disbursement
- ◆ Reporting

# Entry



# Aid Year Activation

- ◆ What does TAL Category Do?
  - Drives the amount of TAL for assistantships
  - Determines disbursement rules
- ◆ Common Problem 1: Cannot select the Career or Home Org
  - The student is not yet term activated
- ◆ Common Problem 2: Wrong Career or Home Org
  - Has the department/career change been entered by Reg Office



# View Career, Program, Plan

[Home](#) > [STF Grad Financial Support](#) > [STF Graduate Financial Support](#) > [Inquire](#) > **Student Info**

**Aid Summary**

**Student Info**

Ewan McGregor

ID: 05057251

TA OK Level:

Mail Code: GFS 2154 Payroll

Country: USA

National ID: 299-82-4875



Tax Status:

Citizenship Status: US Citizen



Tuition Residency: 20.000

## Active Academic Plans

[View All](#) First  1 of 1  Last

Career: GR0

Program: CPLIT

Plan: CPLIT-PHD

Sub-Plan:

Admit Term: 1032

## Milestones

[View All](#) First  1-2 of 5  Last

Milestone	Milestone Complete	Mile Descr	Date Completed
CAND QUALS	Y	Completed	01/17/2003
CAND FORM	Y	Completed	01/17/2003

## Current Student Groups

[View All](#) First  1 of 1  Last

Eff Date	Group	Description
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Save

Return to Search

Next in List

Previous in List

[Aid Summary](#) | [Student Info](#)

# History

- ◆ History of Changes Aid
  - Every aid line in its current state
  - Click history to see previous information
- ◆ History of Changes Distribution
  - Every detail line - Every PTA for every term for every aid line
  - Page shows current information
  - Click history to see previous information



# History of Changes Aid

[Home](#) > [STF Grad Financial Support](#) > [STF Graduate Financial Support](#) > [Inquire](#) > **History of Changes**

History of Changes Aid

History of Changes Distributn

Ewan McGregor

ID: 05057251

Aid Year: 2006

Institution: STANF

### GFS Summary Totals

	Total Amt	Autumn Amt	Winter Amt	Spring Amt	Summer Amt
FLSHP Stipend (STP)	14000.00	4000.00	2000.00	4000.00	4000.00
FLSHP Tuition (TUT)	23765.00	6790.00	3395.00	6790.00	6790.00
Assist Salary (AST)					
Assist TAL (TAL)					



### Graduate Financial Support

View All First 1-2 of 2 Last

Aid Line AST Info/Quarterly Date-Time Updated/Notes

Aid Seq	Ident	Pay Org Description	Disb Plan	Amt Total	Start Date	End Date	Term Date	Info only	Status	Approval Status	History
STP001	LMNO Stipend	Humanities and Sciences	Qtr AWSS	14000.00	09/26/2005	08/07/2006		N	Pending	Pending	<a href="#">History</a>
TUT001	LMNO Fellow	Humanities and Sciences	Qtr AWSS	23765.00	09/26/2005	08/07/2006		N	Pending	Pending	<a href="#">History</a>

[Save](#) [Return to Search](#)

[History of Changes Aid](#) | [History of Changes Distributn](#)



# History of Changes Distribution

[Home](#) > [STF Grad Financial Support](#) > [STF Graduate Financial Support](#) > [Inquire](#) > **History of Changes**

History of Changes Aid | History of Changes Distributn

Ewan McGregor

ID: 05057251

Aid Year: 2006

Institution: STANF

## Graduate Financial Support - Distribution Detail


[View All](#) First  1-8 of 8  Last

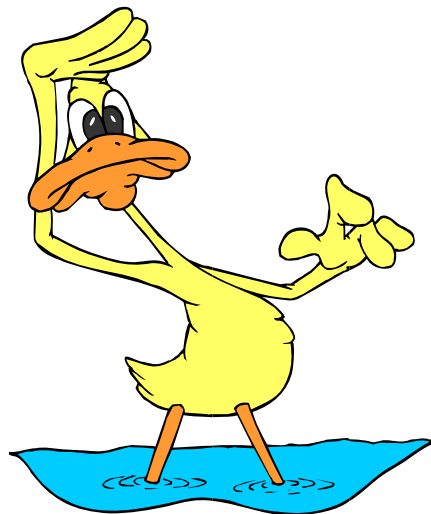
Graduate Financial Support - Distribution Detail										
View All First 1-8 of 8 Last										
Detail	PTAEO		Date-Time Updated/Disbursement							
Aid Seq	Term	Seq No	Ident	Start Date	End Date	Fund Src	Amount	Item Type	Item Descr	History
STP001	1062	1	LMNO Stipend	09/26/2005	12/14/2005	DF	4000.00	843200000011	H&S Flshp GR Std Charges	<a href="#">History</a>
STP001	1064	1	LMNO Stipend	01/03/2006	03/22/2006	DF	2000.00	843200000011	H&S Flshp GR Std Charges	<a href="#">History</a>
STP001	1066	1	LMNO Stipend	04/02/2006	06/12/2006	DF	4000.00	843200000011	H&S Flshp GR Std Charges	<a href="#">History</a>
STP001	1068	1	LMNO Stipend	06/25/2006	08/07/2006	DF	4000.00	843200000011	H&S Flshp GR Std Charges	<a href="#">History</a>
TUT001	1062	1	LMNO Fellow	09/26/2005	12/14/2005	DF	6790.00	843200000035	H&S Fellowship Tuition	<a href="#">History</a>
TUT001	1064	1	LMNO Fellow	01/03/2006	03/22/2006	DF	3395.00	843200000035	H&S Fellowship Tuition	<a href="#">History</a>
TUT001	1066	1	LMNO Fellow	04/02/2006	06/12/2006	DF	6790.00	843200000035	H&S Fellowship Tuition	<a href="#">History</a>
TUT001	1068	1	LMNO Fellow	06/25/2006	08/07/2006	DF	6790.00	843200000035	H&S Fellowship Tuition	<a href="#">History</a>

[Save](#)

[Return to Search](#)

# Finding Item Types

- ◆ Use the lookup -  on the aid line to search
- ◆ Use the PTAEO/Item Type Inquiry to verify an item type is setup
- ◆ Remember, only request item types you really need (and are allowed)



# Using the PTAE0/Item Type Page

[Home](#) > [STF Grad Financial Support](#) > [STF Graduate Financial Support](#) > [Inquire](#) > **PTAEO/Item Type Lookup**

## PTAEO/Item Type Inquiry

Project: 1028946    Task: 1    Award: AABOK    Proj Descr: Grad Aid-Comp Lit

Deptid (Task Org): PPLP    Comparative Literature

View All    First ◀ 1-4 of 4 ▶ Last			
Pay Organization	Description	Aid Year	School
PAAA	Humanities and Sciences	2003	Humanities and Sciences
PAAA	Humanities and Sciences	2004	Humanities and Sciences
PAAA	Humanities and Sciences	2005	Humanities and Sciences
PAAA	Humanities and Sciences	2006	Humanities and Sciences

View All    First ◀ 1-6 of 12 ▶ Last						
Aid Type	Task Org	Item Type	Item Description	Charge Priority	Exp Type	
Assistant	PPLP	843200000012	H&S RA Salary	RA_SAL	51450	
Assistant	PPLP	843200000013	H&S TA Salary	TA_SAL	51410	
Assistant	PPLP	843200000025	H&S PRA Salary	PRA_SAL	51450	
Assistant	PPLP	843200000026	H&S TF Salary	TF_SAL	51410	
Stipend	PPLP	843200000008	H&S Flshp Health Ins	HLTHONLY	57630	
Stipend	PPLP	843200000009	H&S Flshp Document Fee	DOC_ONLY	57370	

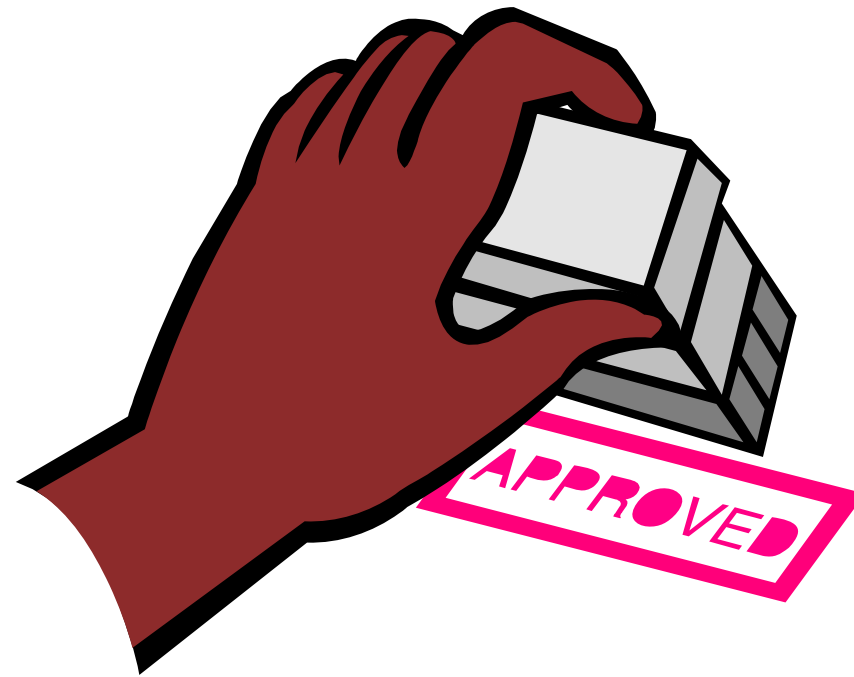
 Save     Return to Search

# Have You Tried?



- ◆ Batch Aid Year Activation
  - Allows you to aid year activate many students at once
  - Module 2: Aid Year Activation
- ◆ Copy Student Aid
  - Allows you to copy aid lines from one student to others
  - Module 11: Copy Student Aid
- ◆ Health Insurance Inquiry
  - View the subsidy status and the reason
  - Module 13: Summary, History, and Inquiry Pages

# Approval



# How Does GFS Select Home Department Approvers?

- ◆ Determined by the Home Org of the student
- ◆ Home Org is entered on Aid Year Activation page
- ◆ Setup for approvers is done within PeopleSoft
- ◆ Verify using PS8 GFS Academic Approvr Setup report in ReportMart



# How Does GFS Select Financial Approvers?

- ◆ Determined by the PTA used on the aid line
- ◆ Setup is done via Authority Manager
- ◆ You can use Authority Manager to look up a person or an organization



# <https://authority.stanford.edu>



The screenshot shows the Authority Manager web application interface. At the top left is the logo for Authority Manager, featuring a stylized figure holding a key, with the text "AUTHORITY Manager" and "Sarah Straight" below it. At the top right is a "End session" button with a checkered flag icon. The main content area is divided into several sections:

- Grant authority**: Includes a link "GRANT authority..." with a key icon and a description: "If you know what authority you need to grant, start here." Below it is a sub-link "or use FIND a person..." to manage an individual's authority.
- Tools**: Includes three links with icons: "FIND a person..." (person icon), "FIND an organization..." (organization icon), and "Acting as... myself" (person with red X icon). Each link has a brief description of its function.
- My authority**: Includes links for "Sarah Straight's Authority" and "Sarah Straight's 'Designated Drivers'", with a description: "People who can act for you, and vice versa. Includes acting approvers and authority-granting proxies."
- View authority**: Includes two sub-sections: "By organization" (with a link to "Stanford University (AA00)") and "By business function" (with a description: "Lists people in all University organizations who...").
- Resources**: Includes links for "Help page" (instructions for tasks), "About prerequisites" (how to complete prereqs), "About acting approvers" (how it works with Oracle Financials), and "Authority Manager service site" (news and updates).

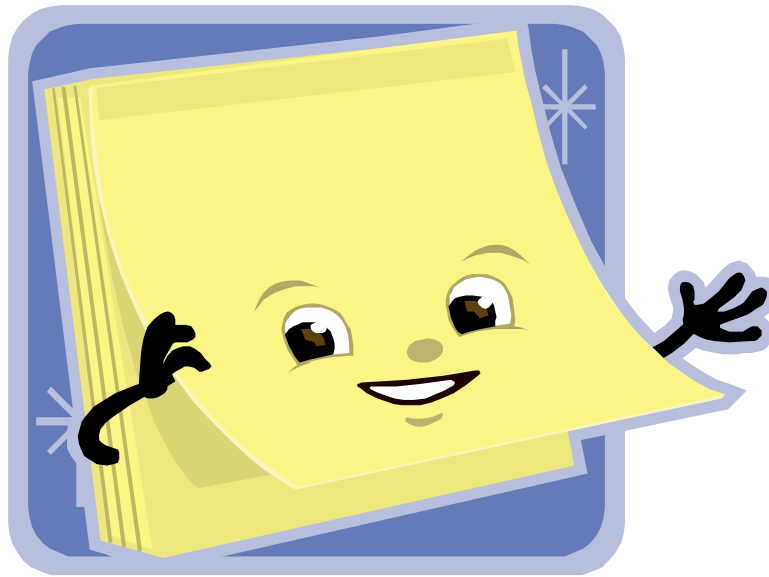


# What If the Approver Isn't Here?

- ◆ Recall the transaction from the Worklist Manager
- ◆ Home Department Approvers
  - What you see is what you get
  - Talk to the authority grantor for your school if you think someone else needs to be added as an approver
- ◆ Financial Approvers
  - Use the hierarchy to find another approver
- ◆ Important Note: Designated Drivers do not work with GFS Approvals

# Didn't you get my note?

- ◆ There are two types of “notes” in GFS



# Notes for GFS Users

- ◆ Notes regarding the aid line visible in GFS
- ◆ Located on the **Quarterly/Notes** tab, click the **Note** button


Aid Year: 2006	Institution: STANF												
		Total Amt	Autumn	Winter	Spring	Summer							
	TAL Category		GR	GR	GR	GR							
	All FLSHP Tuition	6790.00	6790.00										
<b>Enter Fellowship Tuition</b>													
Entry   Quarterly/Notes   WF Transaction													
Aid Seq	Ident	*Pay Org	Autumn Amt	Winter Amt	Spring Amt	Summer Amt	OverrideTerm Amts	Note	User ID	DtTm Updated			
TUT001	XYZ Fellow	PAAA	6790.00				<input type="checkbox"/>	Note	STRAIGHT	02/14/2006 2:30:51.000000PM			



# Notes for Approvers

- ◆ Comments to the approvers visible in the e-mail and Worklist Manager
- ◆ Located on the **WF Transaction** tab, click the **Transaction Info** button

Aid Year: 2006	Institution: STANF					
		Total Amt	Autumn	Winter	Spring	Summer
	TAL Category		GR	GR	GR	GR
	All FLSHP Tuition	6790.00	6790.00			
<b>Enter Fellowship Tuition</b>						
Entry   Quarterly/Notes <b>WF Transaction</b>						
Aid Seq	Ident	*Pay Org	Transaction ID	Transaction Info	Approvers	
TUT001	XYZ Fellow	PAAA <input type="text"/>	00000000	<b>Transaction Info</b>	<b>Approvers</b>	<b>+</b> <b>-</b>



# How To: Change Approvers & Add Comments

- ◆ Change the status to C (Complete)
  - Do NOT save
- ◆ Click the **WF Transaction** tab
- ◆ Click the **Approvers** button
  - Change the appropriate approver(s) click OK
- ◆ Click the **Transaction Info** button
  - Type your note for the approvers and click OK
- ◆ Click Save to route the line



# Changing Approvers

**Aid Year:** 2006      **Institution:** STANF

	Total Amt	Autumn	Winter	Spring	Summer
TAL Category		GR	GR	GR	GR
All FLSHP Tuition	6790.00	6790.00			

**Enter Fellowship Tuition**

Entry    Quarterly/Notes    WF Transaction

Aid Seq	Ident	*Pay Org	Disb Plan	Total Tuition	Detail	Info only	Status	Description	Approval Status		
TUT001	XYZ Fellow	PAAA 🔍	Qtr Aut	6790.00	Detail	<input type="checkbox"/>	C 🔍	Complete	Pending	+	-

# Changing Approvers

Aid Year: 2006      Institution: STANF

TAL Category	Total Amt	Autumn GR	Winter GR	Spring GR	Summer GR
All FLSHP Tuition	6790.00	6790.00			

**Enter Fellowship Tuition**

Entry    Quarterly/Notes    **WF Transaction**

Aid Seq	Ident	*Pay Org	Transaction ID	Transaction Info	Approvers		
TUT001	XYZ Fellow	PAAA	00006905	Transaction Info	Approvers	+	-

Save    Return to Search    Next in List    Previous in List

[FLSHP Stipend](#) | [FLSHP Tuition](#) | [Assist Salary](#) | [Assist TAL](#) | [Work Panel](#)

# Who hasn't approved yet?

- ◆ As the person who routed the aid line, you can look in the Worklist Manager
- ◆ Only one person per role needs to approve
- ◆ Only aid lines waiting for approval are on the list
  - This goes for approvers as well

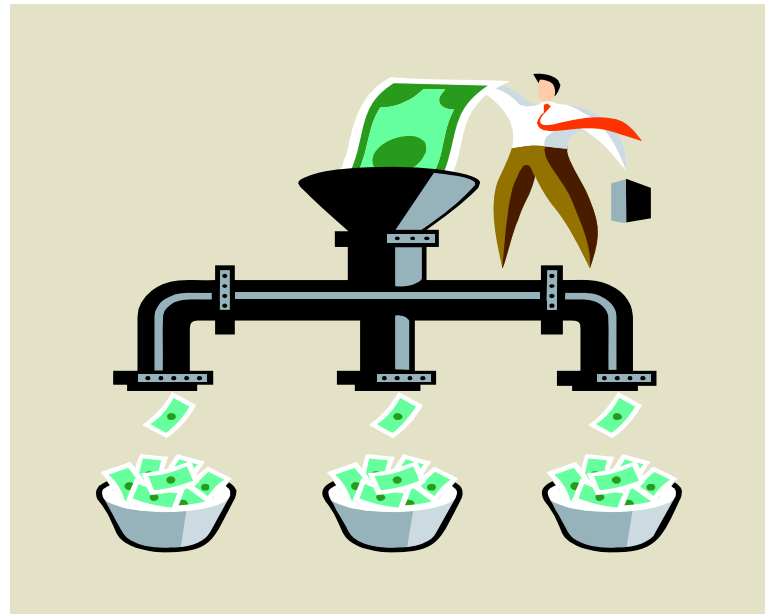




# When was it approved?

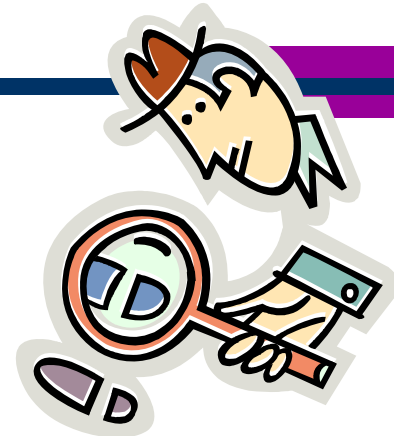
- ◆ On the **WF Transaction** tab, click the **Transaction Info** button
  - Displays the date and time that the line was totally approved/returned
- ◆ **Aid Sum by Student**
  - The **Approver Detail** section shows which approvers approved
  - You can add the date/time information

# Disbursement



# Tracking Down Disbursement

- ◆ Go to the Aid Entry component
  - Check the status & approval status
- ◆ Click the Detail button
  - Be sure you are looking at the correct quarter (Use the arrows if necessary)
  - Click the Disbursement tab
- ◆ If the status is Error, check Disbursement Messages
  - Term-based stipends and tuition only
  - Shows error reason



# Disbursement Messages

[Home](#) > [STF Grad Financial Support](#) > [STF Graduate Financial Support](#) > [Inquire](#) > **Disbursement Messages**

## Disbursement Messages

Branough, Kenneth

ID: 05057250



Aid Year: 2006

Institution: STANF

[View All](#) [First](#) **2 of 3** [Last](#)

**Term:** 1064 2005-2006 Winter

[View All](#) [First](#) **1 of 1** [Last](#)

**Aid Seq:** TUT001 **No:** 1

03/28/2006 8:27 PM

**Message:** Student Not Enrolled

Save

Return to Search

# It Left GFS, Now What?

- ◆ Quarterly Stipends and Tuition
  - STF Account Summary in Student Financials
- ◆ Assistantship Salary
  - After Payroll has processed, GFS Gross Pay Report
- ◆ Monthly Stipends
  - After Payroll has processed, GFS Monthly Post-Doc Stip



# I'm late, I'm late...

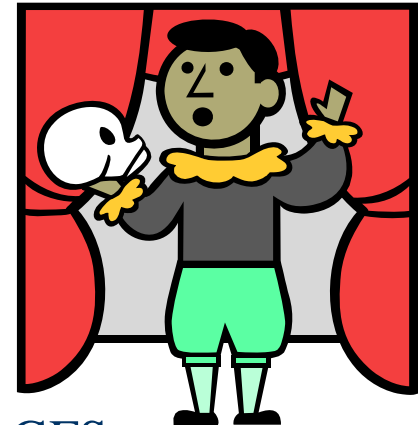
- ◆ Quarterly Stipends (Grad Students)
  - Enter in GFS, disbursement happens nightly\*
- ◆ Monthly Stipends (Postdocs)
  - Enter in GFS and submit a HelpSU to Payroll
- ◆ Assistantship Salary (Grad & Postdoc)
  - Enter in GFS and submit a One-Time Pay form to Payroll
- ◆ Fellowship Tuition (Grad & Postdoc)
  - Enter in GFS, disbursement happens nightly\*
- ◆ Tuition Allowance (Grad & Postdoc)
  - Enter in GFS, disbursement happens nightly\*



\* Dependent upon disbursement rules (enrollment)

# To Journal or Not to Journal

- ◆ Quarterly Stipends (Grad Students)
  - No journals – Only change GFS
- ◆ Monthly Stipends (Postdocs)
  - iJournal AND change GFS
- ◆ Assistantship Salary (Grad & Postdoc)
  - Labor Distribution adjustment AND change GFS
- ◆ Fellowship Tuition (Grad & Postdoc)
  - No journals – Only change GFS
- ◆ Tuition Allowance (Grad & Postdoc)
  - No journals – Only change GFS



# The Elusive Unapplied Aid

- ◆ What is it?
  - Overpayment of a charge
  - Your PTA has been charged
  - The money cannot be refunded to the student
- ◆ How do I know?
  - [GFS Unapplied Aid Report](#)
- ◆ What do I do?
  - Student charged incorrectly: contact SFS
  - Student charged correctly: reduce the aid line in GFS





# Reporting





# Reporting Agenda

- ◆ Popular GFS Reports
- ◆ Historical Reports (Prior to GFS)
- ◆ Health Insurance Waiver Information
- ◆ Multiple Processing Options
- ◆ Tips and Tricks

# GFS Reports - ReportMart

## Stanford ReportMart > Graduate Financial Support

The screenshot displays the Stanford ReportMart web application interface. At the top, the header reads "Stanford ReportMart by BRIO PORTAL™" with a help icon on the right. Below the header is a navigation bar with tabs for "PERSONAL", "BROWSE", "SEARCH", "SCHEDULE", and "PREFERENCES". The "BROWSE" tab is active, showing a left-hand navigation pane with a tree structure. The "Graduate Financial Support" folder is selected and circled in red. The main content area is titled "Graduate Financial Support" and contains a list of reports:

- GFS Account Translation**: Click here for the online tool that translates a legacy account and GL code to its new PTAE0 Oracle value. (Sep 4 2004 4:49 PM)
- PS8 Display Department Tree(b)**: Rpt PS001(b): This report displays the University department tree as implemented in PS HR and used in GFS. It has multiple selection options. (PS8\_PS001\_display\_dept\_tree\_2004\_09\_04, mod 9/4/2004 for V8, A/P, A2K\_RPRD) (Aug 2 2002 10:57 AM)
- PS8 GFS Academic Approvr Setup**: Rpt GFS002: Provides a list of approvers by school. Includes academic organization, PeopleSoft operator ID, name, email, and work phone info (PS8\_GFS002\_home\_dept\_appr\_2006\_02\_06, mod 2/8/2006, Q/A, A2K\_RPRD) (Aug 7 2004 5:16 PM)
- PS8 GFS Aid by Stu (1990-2002)**: Rpt GFS004: Provides Graduate Aid info on historical data from NSI (1990-1991 through 2001-2002) (PS8\_GFS004\_nsi\_gfs\_aid\_by\_stu\_2004\_07\_30, mod 8/7/2004 for V8, Q/A, A2K\_RPRD) (Aug 7 2004 5:19 PM)

Each report entry includes a title, a brief description, a date and time, and a small icon. The right side of the page features a vertical toolbar with icons for printing, saving, and sorting, with a "By Name" dropdown menu and a "Sort" button.

# Popular GFS Reports

- ◆ Aid Disbursement Status (Rpt GFS006)
- ◆ Aid Sum by Money Source (Rpt GFS007)
- ◆ Aid Sum for ALL Student (Rpt GFS009)
  - Includes student w/o aid



# Popular GFS Reports

- ◆ Print a GFS Student (Rpt GFS021)
  - Run report with small populations (SLOW)
- ◆ Unapplied Aid Report (Rpt GFS015)
  - **UPDATED** - Prompt on Academic Program Status if processing by Academic Plan or Acad Dept
  - Processing by Money will include everyone
- ◆ GFS Gross Pay Report (Rpt GFS024)



# Historical Reports

- ◆ GFS Information from 1990 – 2002 (NSI data)
  - Located in RM1 category “Graduate Financial Support”
    - Aid by Year (1990-2002) (Rpt GFS005)
    - Aid by Student (1990-2002) (Rpt GFS004)
  
- ◆ GFS Information from 2003 (Legacy Data)
  - Located in RM1 category “GFS 2003 Reports”
    - Aid Summary - All Students (Rpt GFS027)
    - Aid Summary By Money (Rpt GFS028)
    - Aid Summary by Student (Rpt GFS029)
    - Unapplied Aid (Rpt GFS030)

# Health Insurance Waivers

- ◆ Health Insurance Subsidy Report (Rpt GFS031)
  - Data beginning Aid Year 2006 (1062 onwards)
  - Excludes Postdocs and Non-Matrics
  - Includes different subgroup sections that can be exported

**Sections:**

ALL STUDENTS:    Health Insurance Subsidy Report    Results

PIVOTS FOR SUBGROUPS:

Students with Waivers    Students Paid by Outside Source    Students with Full Subsidies    Students with Partial Subsidies



# Multiple Processing Options

## ◆ Example: Aid Summary by Student (Rpt GFS008)

### Instructions for Processing:

Click the Process button below to run the GFS Aid Sum by Student report. To limit the data included in the output, you may select high-level limits such as one or more Academic Plans, Department Ids, or Project Ids. Selecting Ignore will include all available values for a limit.

#### Student Related

Process by: Acad  
Dept/Schl (=AcadOrg)

Process by:  
Academic Plan

Process by:  
Emplid / Name

#### Money Related

Process by: Pay Org

Process by:  
Award/Project/Task

Process by:  
Aid Ident

After Processing, click on a Section button below or go to a Results Section for additional limiting, sorting and exporting options.

To limit the GFS Aid Sum by Student report further you may set Result section limits or utilize the Hide/Show option in the Pivot section on fields such as aid type (Stf Gf Aid Type) or name (Pers Name, or Formatted Name)





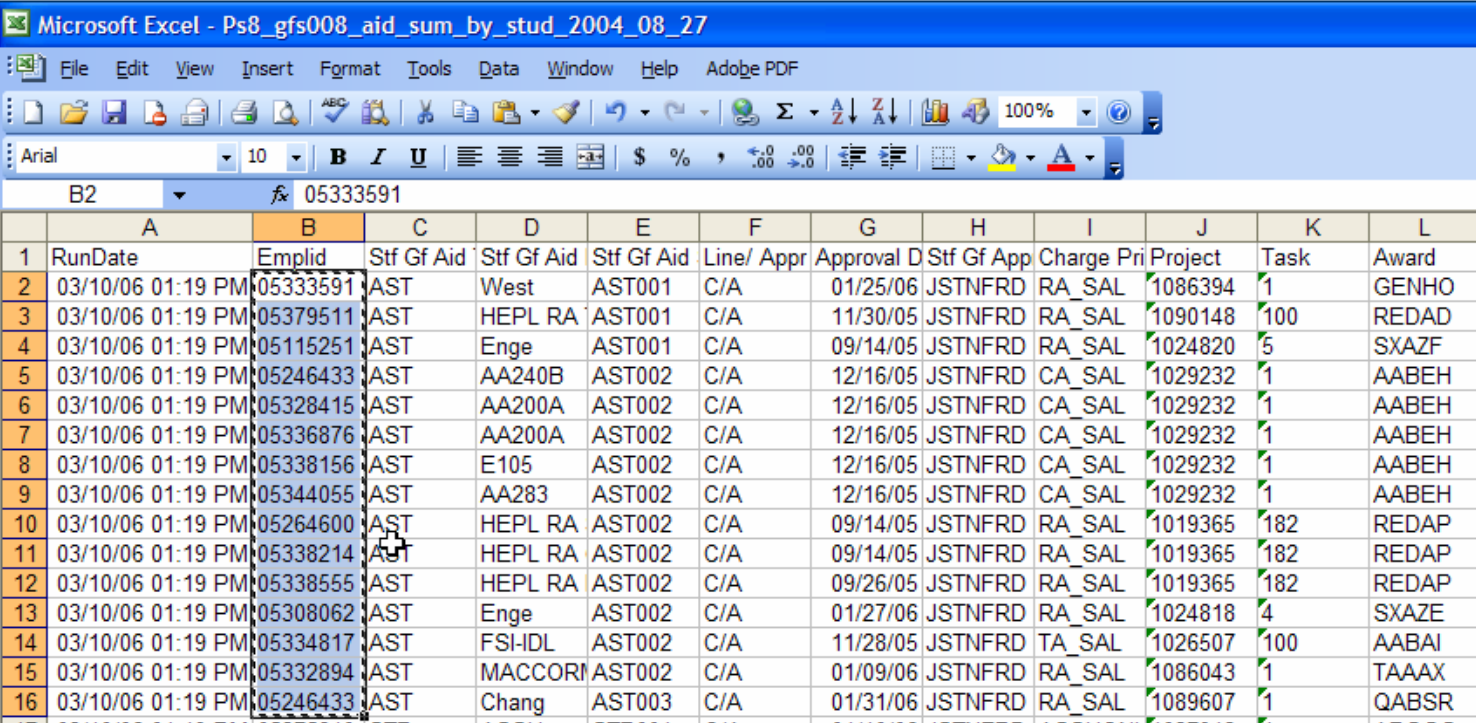
# Tips and Tricks – Adding Multiple Emplids



- ◆ Select list of Emplids from source (e.g., Excel)
- ◆ Use Microsoft Word to format Emplid list
- ◆ Copy (Ctrl+C) string of Emplids from Word
- ◆ Paste (Ctrl+V) string of Emplids into ReportMart  
Limit box

# Tips and Tricks – Adding Multiple Emplids

- ◆ Copy (Ctrl+C) list of Emplids from source



Microsoft Excel - Ps8\_gfs008\_aid\_sum\_by\_stud\_2004\_08\_27

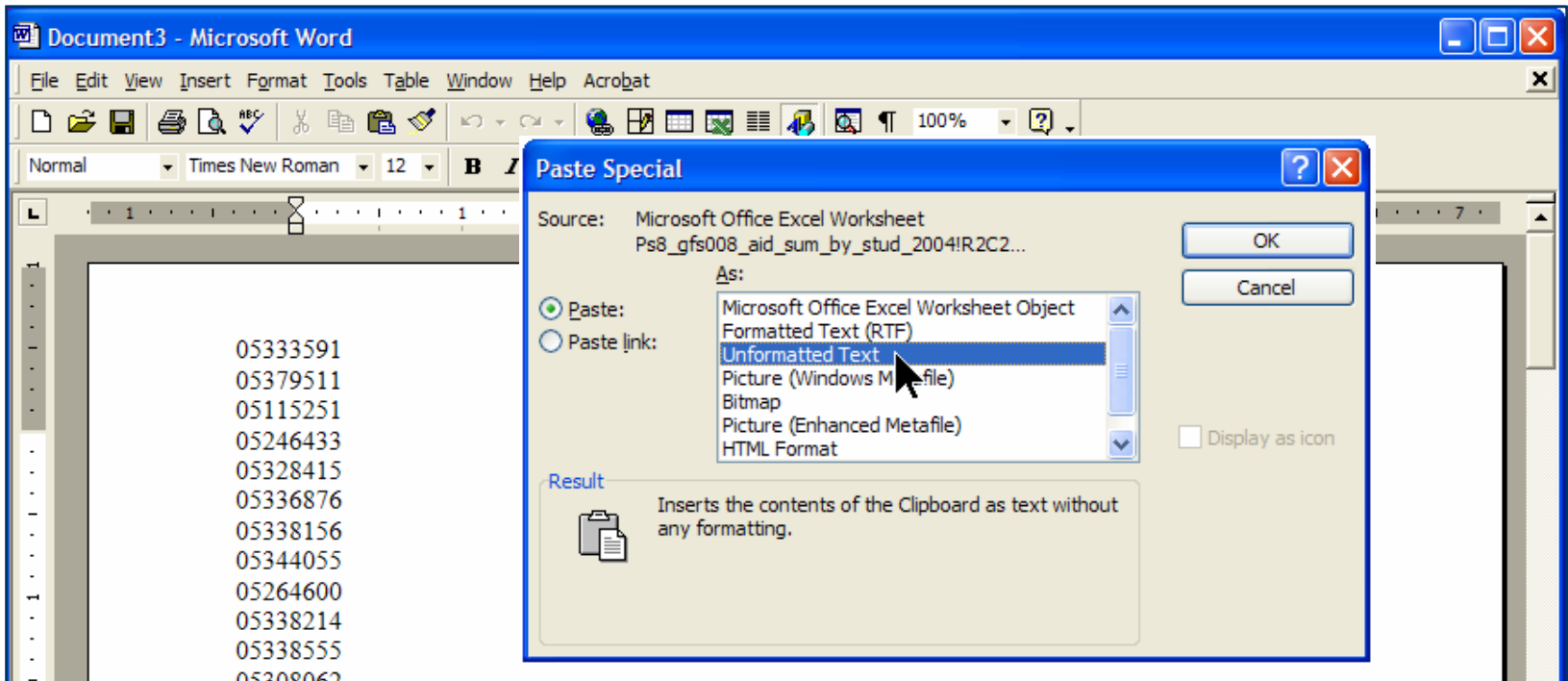
File Edit View Insert Format Tools Data Window Help Adobe PDF

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	A	B	C	D	E	F	G	H	I	J	K	L
1	RunDate	Emplid	Stf Gf Aid	Stf Gf Aid	Stf Gf Aid	Line/ Appr	Approval D	Stf Gf App	Charge Pri	Project	Task	Award
2	03/10/06 01:19 PM	05333591	AST	West	AST001	C/A	01/25/06	JSTNFRD	RA_SAL	1086394	1	GENHO
3	03/10/06 01:19 PM	05379511	AST	HEPL RA	AST001	C/A	11/30/05	JSTNFRD	RA_SAL	1090148	100	REDAD
4	03/10/06 01:19 PM	05115251	AST	Eng	AST001	C/A	09/14/05	JSTNFRD	RA_SAL	1024820	5	SXAZF
5	03/10/06 01:19 PM	05246433	AST	AA240B	AST002	C/A	12/16/05	JSTNFRD	CA_SAL	1029232	1	AABEH
6	03/10/06 01:19 PM	05328415	AST	AA200A	AST002	C/A	12/16/05	JSTNFRD	CA_SAL	1029232	1	AABEH
7	03/10/06 01:19 PM	05336876	AST	AA200A	AST002	C/A	12/16/05	JSTNFRD	CA_SAL	1029232	1	AABEH
8	03/10/06 01:19 PM	05338156	AST	E105	AST002	C/A	12/16/05	JSTNFRD	CA_SAL	1029232	1	AABEH
9	03/10/06 01:19 PM	05344055	AST	AA283	AST002	C/A	12/16/05	JSTNFRD	CA_SAL	1029232	1	AABEH
10	03/10/06 01:19 PM	05264600	AST	HEPL RA	AST002	C/A	09/14/05	JSTNFRD	RA_SAL	1019365	182	REDAP
11	03/10/06 01:19 PM	05338214	AST	HEPL RA	AST002	C/A	09/14/05	JSTNFRD	RA_SAL	1019365	182	REDAP
12	03/10/06 01:19 PM	05338555	AST	HEPL RA	AST002	C/A	09/26/05	JSTNFRD	RA_SAL	1019365	182	REDAP
13	03/10/06 01:19 PM	05308062	AST	Eng	AST002	C/A	01/27/06	JSTNFRD	RA_SAL	1024818	4	SXAZE
14	03/10/06 01:19 PM	05334817	AST	FSI-HDL	AST002	C/A	11/28/05	JSTNFRD	TA_SAL	1026507	100	AABAI
15	03/10/06 01:19 PM	05332894	AST	MACCOR	AST002	C/A	01/09/06	JSTNFRD	RA_SAL	1086043	1	TAAAX
16	03/10/06 01:19 PM	05246433	AST	Chang	AST003	C/A	01/31/06	JSTNFRD	RA_SAL	1089607	1	QABSR

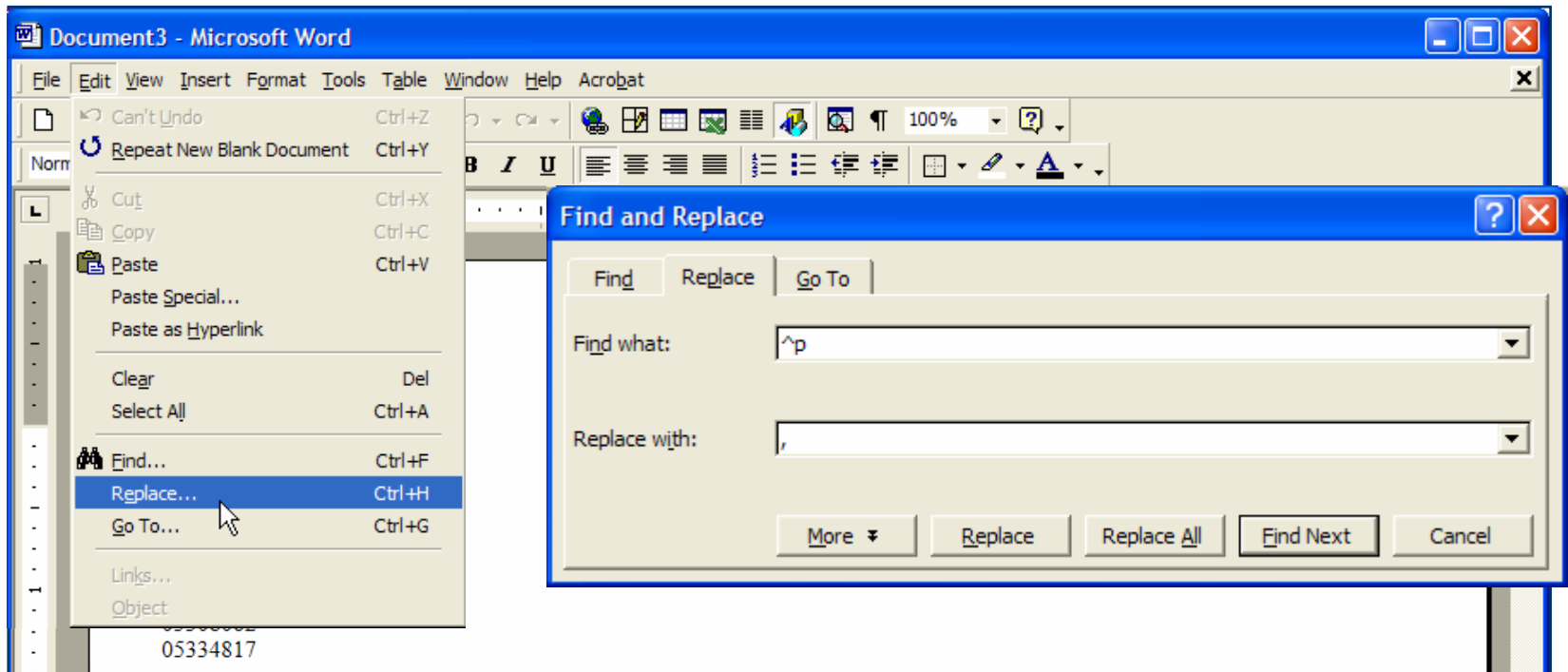
# Tips and Tricks – Adding Multiple Emplids

- ◆ Edit > Paste Special into Word as Unformatted Text



# Tips and Tricks – Adding Multiple Emplids

- ◆ Edit > Replace to Replace “^p” with a “,” (comma)
- ◆ Click the Replace All button



# Tips and Tricks – Adding Multiple Emplids

- ◆ List of Emplids should be formatted with a comma separating each value
- ◆ Note: This is the required format

```
05333591,05379511,05115251,05246433,05328415,05336876,05338156,05344055,0526  
4600,05338214,05338555,05308062,05334817,05332894,05246433|
```

# Tips and Tricks – Adding Multiple Emplids

- ◆ Paste Emplids into custom values Limit: Emplid box
- ◆ Select green check box to display values

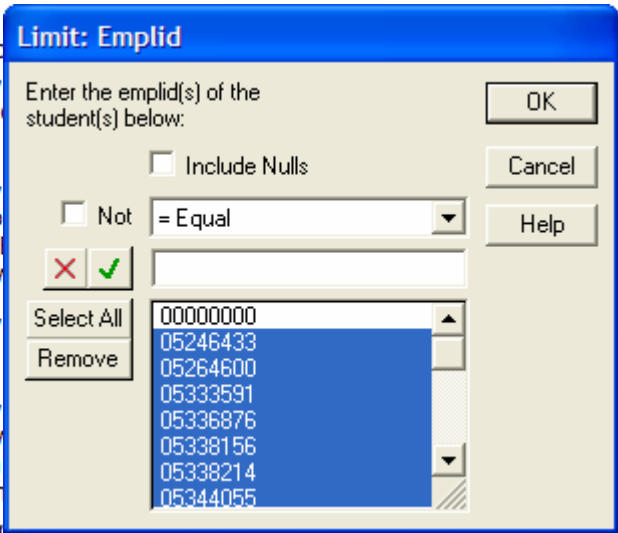
**Instructions for Processing:**

Click on one of the Process buttons below:

- Process by: Acad Plan
- Process by: Acad Dept/School
- Process: Enter an Emplid
- Process: Search by Name

1. Process by ... may also cho...
2. Process by dept or school Status. Note: ... run more slow...
3. Process by students.
4. Process by ... sure you know ... and enter it in ... then the first r...

After Processing, click on a Section button below or go to a Records Section for additional filtering, sorting and exporting options.



# Tips and Tricks – Pivots

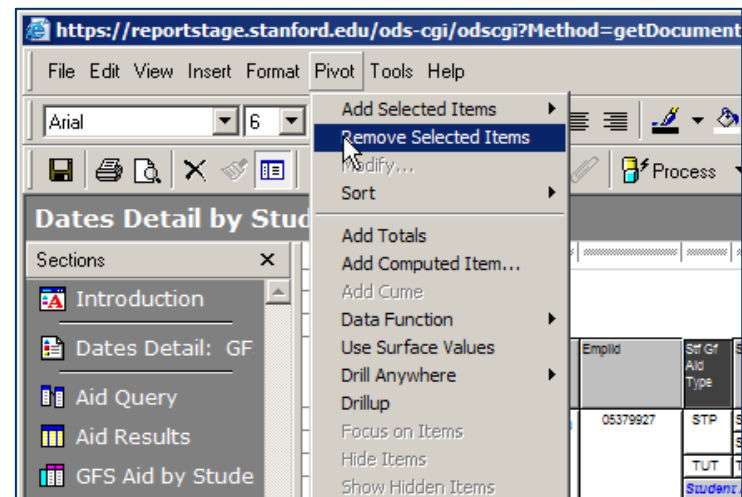
- ◆ Removing columns to print on letter size paper (must not be in Print Preview)
- ◆ There are two ways to delete a column from a pivot
  - Using the Pivot Menu Item
  - Using the Pivot Outliner



# Tips and Tricks - Pivots

## ◆ Deleting Column Using the Pivot Menu Item

1. Take out of Print Preview Mode
2. Highlight Column
3. Select Pivot from Menu Bar
4. Choose “Remove Selected Items”

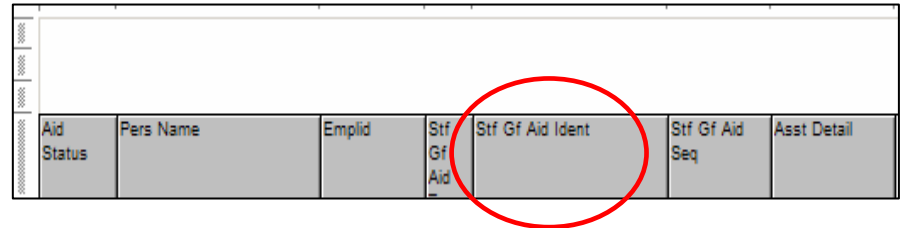




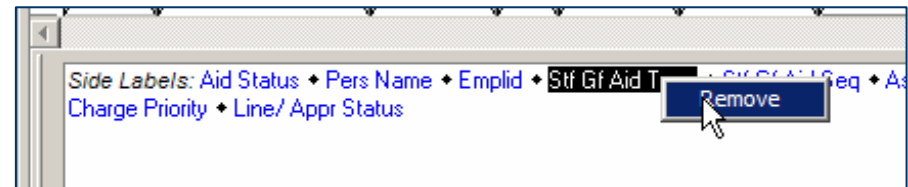
# Tips and Tricks - Pivots

## ◆ Deleting Column Using the Pivot Outliner

1. Take out of Print Preview Mode
2. Highlight pivot label in Outliner (*Side Labels* or *Top Labels*) section
3. Right-click label to get “Remove” option or use Delete on keyboard



Aid Status	Pers Name	Emplid	Stf Gf Aid	Stf Gf Aid Ident	Stf Gf Aid Seq	Asst Detail
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# ReportMart Reminders

## ◆ Submitting Tickets

- Request Category = Administrative Applications
- Request Type = ReportMart
- Include Report Title and Report Number in ticket
- Include Macintosh or PC user



## ◆ ReportMart1/Brio GFS Security

- ReportMart1/Brio access for StuAdmin (incl. GFS) and HR is based on PeopleSoft security access (RM1/Brio access is updated hourly)

# GFS Reminders

- ◆ Submitting HelpSU Tickets
  - Request Category = Administrative Applications
  - Request Type = PeopleSoft GFS
  - Include Name and Emplid in the ticket
- ◆ PeopleSoft Learning Center
  - <http://peoplesoft.stanford.edu/learningcenter>



# Thanks for Coming!

- ◆ Refer to the online resources for documentation
- ◆ Turn in note cards to the front of the room
- ◆ Next sessions begin at 10:30am
  - Following the Money Trail – Room 201
  - Processing Summer Quarter – Room 120

