Batch Upload GFS Aid Entries for Non-Matriculated Graduate Students

This process has been developed to allow expert users to enter multiple Monthly Stipend/Fee (STP), Quarterly Fees (QTR), and NM Tuition (TUT) aid lines by uploading an excel spreadsheet rather than entering aid lines manually in GFS one by one. After loading, aid lines will be available on the GFS Non-Matriculated Student Aid Entry page in Draft status.

Step 1: Access the data entry Template

From the GFS Center in the GFS Menu portlet click on Upload - Non-Matriculated Student Aid

You will be presented with a run control search page. Either click SEARCH to select an existing value or click the Add a New Value tab, enter a new Run Control ID and click ADD. (Suggestion: use your SUNet ID as your Run Control ID.)

STF Batch Load NM Aid Entries

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value  Add a New Value

Search Criteria

Search by:  Run Control ID begins with

☐ Case Sensitive

Search  Advanced Search
This will bring up the Run Control page; it is where the user sets the parameters for the process to be run.

Click the Sample Template link to download the GFSNMWorksheet.xlsx file. Note: Although you may save a copy of the template locally for future use if you wish, we recommend downloading a new copy with each use in case any changes have been made.

**Step 2: Complete the Template**

The Template has 3 tabs: Grad NM Entry, Values, and Field Format lengths. The Values tab shows the acceptable values and descriptions for many of the fields on the worksheet. The Field Format lengths tab shows the format (Character, number, date) and length for each field on the worksheet.

The Grad NM Entry Tab is where data entry is required for each aid line to be added to GFS. This is the only sheet required for upload. You’ll notice Comments in the header cells that give you examples for most of the columns:

![Worksheet Example](image)

**Tips for using the worksheet**

1. There must be data entered in every cell for each row with data. If you would like to leave a cell blank, enter the “#” symbol (shift-3). If you enter an Emplid in column A, every cell in that row through Column S must have a value. Most columns have a drop down list of valid values to choose from (if you’re using Excel 2010 or later).

2. Name is optional and will not be verified, so the formatting of the name is not critical. Lines will be matched to students using the Emplid field so it is critical that the Emplid be correct, including the leading zero. Be sure to keep this column in Text format if copying and pasting from another source.

3. You may enter either Item Type or PTA & Charge priority. It is not necessary to enter both. (Enter “#” in the columns you’re not using.)
On the following pages you’ll find a screen shot of an aid line entered in GFS, then the rows of the template that would upload that aid line. (It might help to see the details if you zoom in on the PDF!)

**Monthly Stipend/Fee:**

It is not possible to enter monthly stipend or VSR fee lines that are split across multiple PTA’s as a single aid line.

Note that you can use either the Item Type or the PTAE & Charge Priority. Both are not required.
Quarterly Fees:

It is not possible to enter quarterly fee lines that are split across multiple PTA’s as a single aid line.

NM Tuition:

It is not possible to enter tuition lines that are split across multiple PTA’s as a single aid line.

Once the worksheet is complete, save it on your computer as an .xlsx worksheet. The file name can be anything you want, but the format must be .xlsx.

The following pages explain the steps for uploading the template you’ve created.
Step 3: Upload the Completed Template

1. Enter the appropriate Aid Year, e.g., 2020.
2. Click Attach.
3. Click Browse and navigate to the .xlsx file you’ve saved, then click Open.
4. Click Upload.
5. You’ll get an “Upload Successful” message. The Input File field should now be populated.

Step 4: Run the GFS Batch Load Aid Entries Process

1. Click Run which will bring up the Process Scheduler Request Page.

Process Scheduler Request
2. The name of this process is STF_AE_GF005. You shouldn’t need to enter anything on this page; the defaults are what you want to use. Click OK.

3. You will be returned to the Run Control page where you’ll now see a Process Instance number and link to the Process Monitor.

![STF Batch Load NM Aid Entries]

4. Click on the Process Monitor link. On the Process Monitor page you should see your process listed.

![Process List]

5. You may have to click Refresh several times before you see the Run Status update to Success. (How long it takes depends heavily on the number of records on your template.)
6. Once the Distribution Status says “Posted” (even if the process didn’t complete successfully) click on Details which will bring up the Process Detail page.

7. Click on View Log/Trace.

8. Click on the log file, which will open in a new window.
Interpreting the Log File
Some of the rows from your template may load without errors, or with warning messages that you are used to seeing when doing manual entry. You may need to adjust some rows in the template and load them again. If you successfully load a file more than once it will load the records multiple times so be careful about file management.

The first set of messages has to do with the formatting of the file that was uploaded. You’ll either see a message that says “File Read Successfully” or something related to a formatting problem with the file. The most common issue is blank cells (be sure to use “#” if you want to leave a cell blank). In that case the message will be “Spreadsheet Contained Blank Cells – Unable to read file.”

The next section contains messages about any data errors. You’ll see the same error messages as you would when entering data in GFS. The data errors refer to the rows from the spreadsheet that was loaded so you can correct the errors easily and reload the entire file.

If the records are loaded successfully, the last section contains a “Template ID” and a list of successfully processed rows. The Template ID is useful for reviewing the aid lines that were uploaded and “Save & Submit.” Hint: You can copy the Template ID to your clipboard and paste it in the next step.

Step 5: Review Entries, Save & Submit
Use the Advanced Search feature and the Template ID from the previous step to create a list of the students from your Template. It may take 1-2 hours after the upload before the Template ID is available in the search field.
A list of all the students included on the template will be displayed. You can sort this list by clicking on the headers.

<table>
<thead>
<tr>
<th>Aid Year</th>
<th>EmplId</th>
<th>First Name</th>
<th>Last Name</th>
<th>Template Id</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>123456</td>
<td>Name1</td>
<td>Surname1</td>
<td>12345</td>
</tr>
<tr>
<td>2018</td>
<td>654321</td>
<td>Name2</td>
<td>Surname2</td>
<td>65432</td>
</tr>
<tr>
<td>2018</td>
<td>112233</td>
<td>Name3</td>
<td>Surname3</td>
<td>11223</td>
</tr>
<tr>
<td>2016</td>
<td>44213</td>
<td>Name4</td>
<td>Surname4</td>
<td>44213</td>
</tr>
</tbody>
</table>

You can click on the first non-matric student on the list, which will take you to the Aid Entry page. You’ll find the aid lines that were entered from your template in Draft status. You can make final edits at this point. Click the checkbox next to the aid line to “Save & Submit” for approval.

Use the Next in List and Previous in List buttons at the bottom of the page to navigate through all of the aid lines entered from your template.

At this point the aid lines behave no differently from those entered manually.

**Need More Help?**

If you need assistance with GFS, please submit a [GFS Service Request](#).