

STUDENT OVERLAP REPORT
STUDENT PROGRAM CHANGE
ACCEPT/REJECT REPORT
FILE UPLOAD PROCESS



WebGrants User Guide

Updated: July 31, 2007

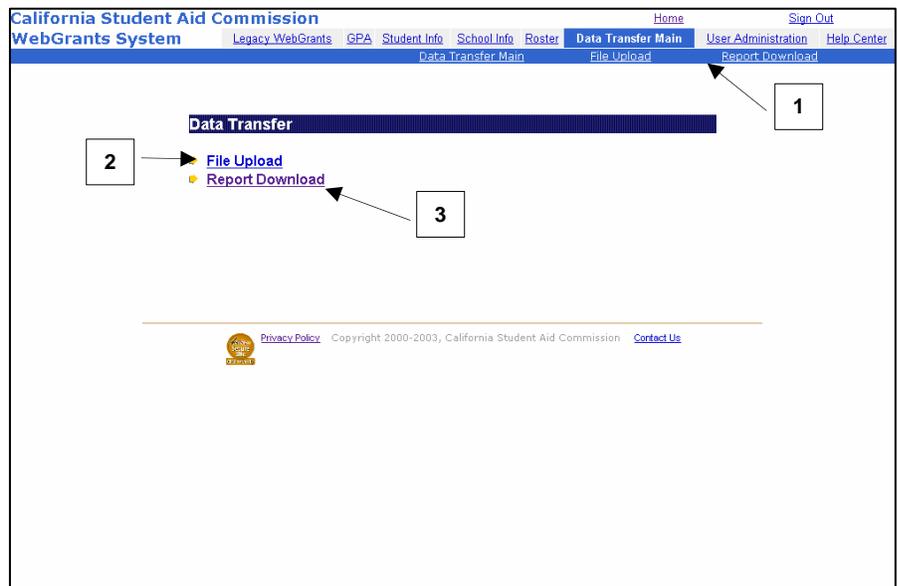
STUDENT OVERLAP REPORT, STUDENT PROGRAM CHANGE ACCEPT/REJECT REPORT, FILE UPLOAD PROCESS

Purpose

The **Student Overlap Report** shows schools all of their students who are in overlap (i.e. Auto Accepted for a Cal Grant program and Qualified for another program; like Cal Grant A & B). The report *excludes* any E2 (Transfer Entitlement) students with an award on hold flag equal to 'Y' or 'V' on the Cal Grant Roster. The Student Overlap Report can be downloaded from WebGrants just like any other report. In addition, a new report entitled **Student Program Change ACCEPT/REJECT Report** will also be available from WebGrants so that schools will be able to see a report showing which students' program codes were changed or which ones were rejected with the reason stated. Schools can also upload a **Student Program Change Upload** file which contains all of the students for which that school intends to change the program code.

Page Elements

- 1. Data Transfer Navigation Bar**
This shortcut navigation bar contains links to all pages within the Data Transfer area of WebGrants.
- 2. Download Reports** Link to the Download Reports Page where users can view and download various reports (see page 3).
- 3. File Upload** Link to the File Upload Page where users can upload files from their PC to the Grant Delivery System (see page 5).



Access

This page can be accessed by clicking on the [Data Transfer](#) link in the Options box on the WebGrants Home Page or by clicking on the [Data Transfer](#) link in the WebGrants Navigation Bar located in the upper right of all WebGrants pages.

Student Overlap Report and Student Program Change ACCEPT/REJECT Report

Purpose

A batch job is run on a weekly basis which creates a report for each school containing all the students who are in overlap status excluding students with award on hold flag equal to 'Y' or 'V'.

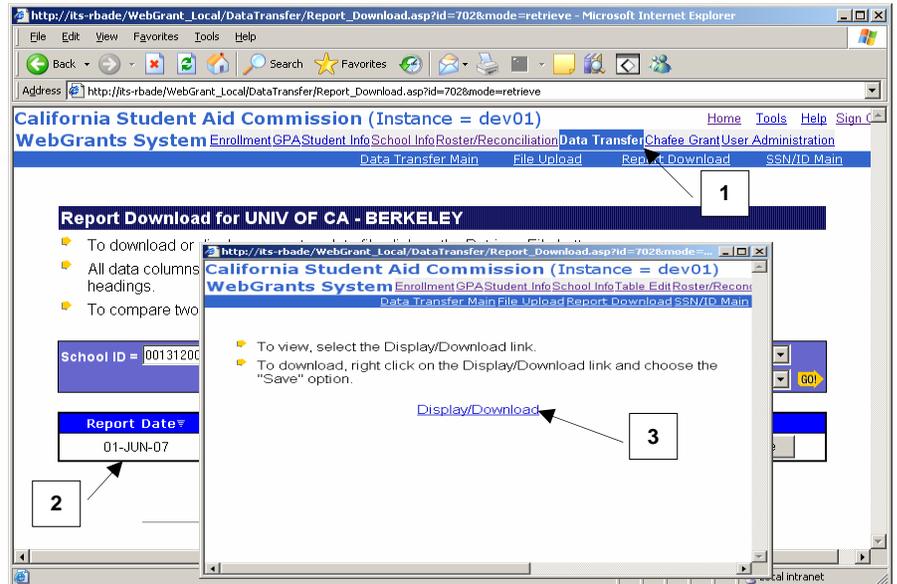
Page Elements

1. Record Display Criteria Bar

The fields on this blue bar allow users

to select which types of reports to display.

- **School ID** - Users select the school to display by selecting the 8-digit school code from this drop down list. Only the schools to which the user is authorized will be displayed.



- **Academic Year** - Users select the academic year for which to display reports by selecting a year from the drop down box.
 - **Report** - Users select the type of report to display by selecting a report type from the drop down box. Selecting "All" will display all available types.
 - **Student Overlap Report** A weekly report generated to inform schools of all the students who are in overlap status excluding students with award on hold flag equal to 'Y' or 'V'. This report is informational only and is not to be returned to the Commission through the file upload process (see page 5).
 - **Student Change AR Report** A weekly report entitled **Student Program Change ACCEPT/REJECT Report** to inform schools which students' program codes were changed or which ones were rejected with the reason stated.
 - **Month** - Users can display reports that were created during a particular month by selecting a month from this drop down box.
 - **Media Type** - WebGrants reports are created in two different file types. Users can filter reports by their output type by selecting a media type from the drop down box.
 - **DataFile** - The report data is formatted to facilitate download into an external database program.
 - **Report** - The report data is formatted to facilitate on screen viewing or printing.
2. **Report Display Table** - Displays a list of reports that match the selection criteria chosen in the Search Bar.
3. **[Display/Download](#) Link** - Click here to view and/or download the report listed on the corresponding line.

Access

The Download Reports Page can be accessed by clicking the [Download Reports](#) link on the Data Transfer Main Page (see page 1) or by clicking the [Download Reports](#) link on the blue submenu navigation bar.

Page Functions

View a Report

1. Select the school code of the school for which to display reports from the **School ID** drop down list.
2. Select the academic year for which to display reports from the **Academic Year** drop down list.
3. To further filter the list of reports to display, select a report, month, and/or media type from the corresponding fields (this step is not required).
4. Click the <Go!> button
™ The selected reports will populate the **Report Display Table**.
5. Click the [Display/Download](#) link on the **Report Display Table** that corresponds to the report to view.
™ The selected report will be displayed in a separate pop-up window.

Download a Report

1. Select the school code of the school for which to display reports from the **School ID** drop down list.
2. Select the academic year for which to display reports from the **Academic Year** drop down list.
3. To further filter the list of reports to display, select a report, month, and media type to from the corresponding fields (this step is not required).
4. Click the <Go!> button
™ The selected reports will populate the **Report Display Table**.
5. Click the [Display/Download](#) link on the **Report Display Table** that corresponds to the report to view **with the right mouse button**.
™ A shortcut menu will appear next the mouse cursor
6. Select the "Save Target As..." option from the shortcut menu (see figure 4-1)
™ The "Save As" pop-up box will appear (see figure 4-2)
7. Select a location on your PC or network drive to which the report can be saved and click the **<Save>** button.

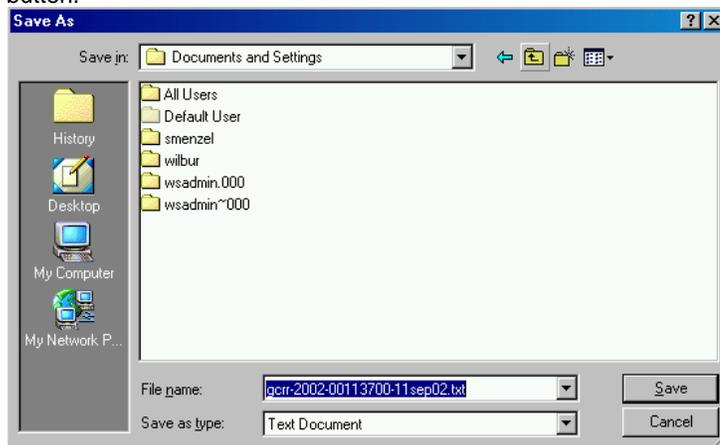


Figure 4-2: "Save As" pop-up box

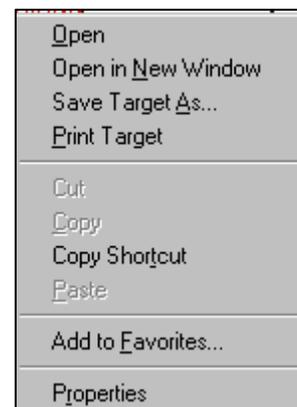


Figure 4-1: Shortcut Menu

Student Program Change Upload Page

Purpose

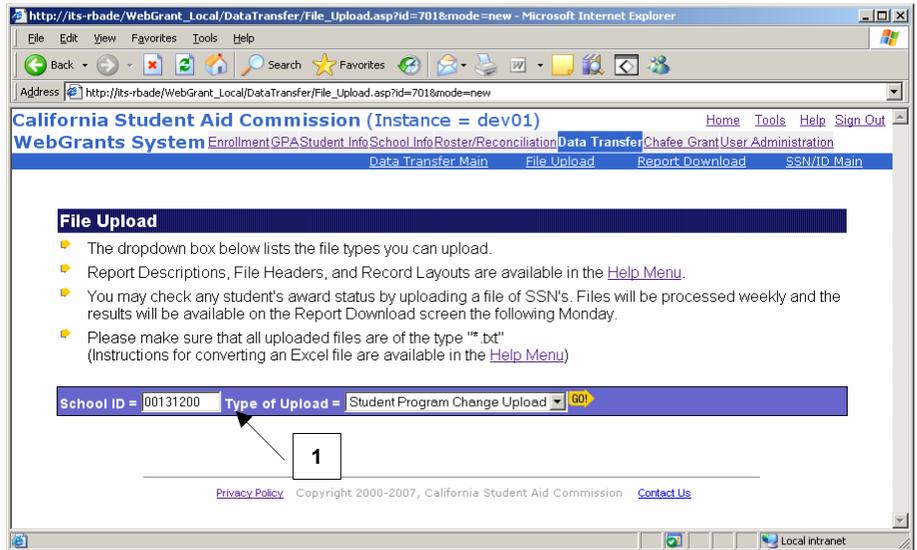
Schools can also upload a **Student Program Change Upload** file which contains all of the students for which that school intends to change the program code. Uploading is a simple process participating schools use to transmit specifically formatted data files containing payment and status change transactions to the Commission for batch processing. Some commonly uploaded Data Files include GPA Verifications, Rosters and Community College Data Files.

Data files being prepared for transmission to the Commission must be saved prior to selection and transmitted in a text file format with a ".txt" file extension.

Page Elements

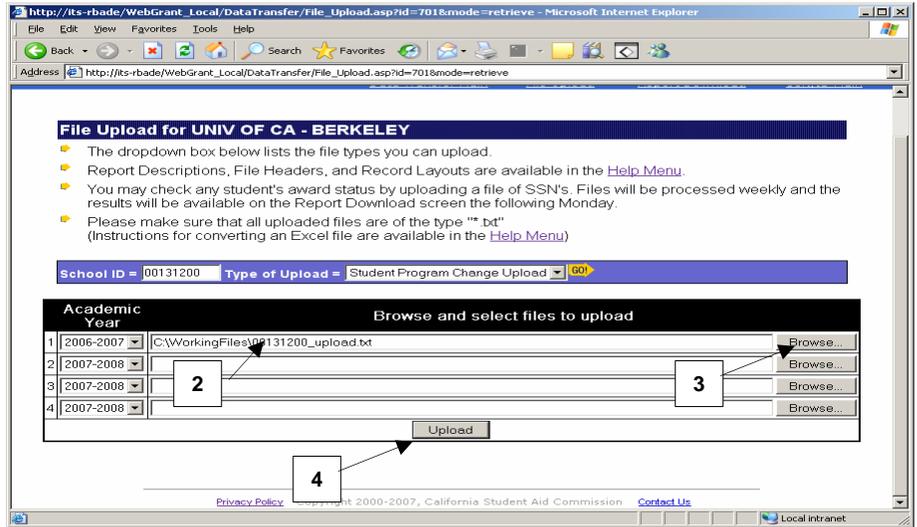
1. **Record Display Criteria Bar** - The fields on this blue bar allow users to select which types of reports to display.

- **School ID** - Users select the school to display by selecting the 8-digit school code from this drop down list. Only the schools to which the user is authorized will be displayed.
- **Type of Upload** - Users identify the type of file to be uploaded by selecting a file type from this drop down list.



- **GPA** Student grade point average verifications for either March 2nd or September 2nd Cal Grant award consideration.
- **Roster** Payment transactions updates for students listed on the school's grant roster.
- **Award Status Extract** List of students for which an award status extract is requested (see page 3).
- **C2 Enrollment Data** California Community College enrollment data for students being considered for a September 2nd Community College Cal Grant award (*Community College only*).
- **EL Verification** Upload in response to the Education Level Verification Report sent to schools in February requesting the verification of listed students' education level as of the date the first payment was reported to the Commission.

2. **File Location Fields** file path location of the file to upload.
3. **<Browse> Button** Clicking here allows the user to search their PC or network drive for a file to upload.
4. **<Upload> Button** After entering a file to upload in at least one of the File Location Fields, this button must be clicked to upload the file.



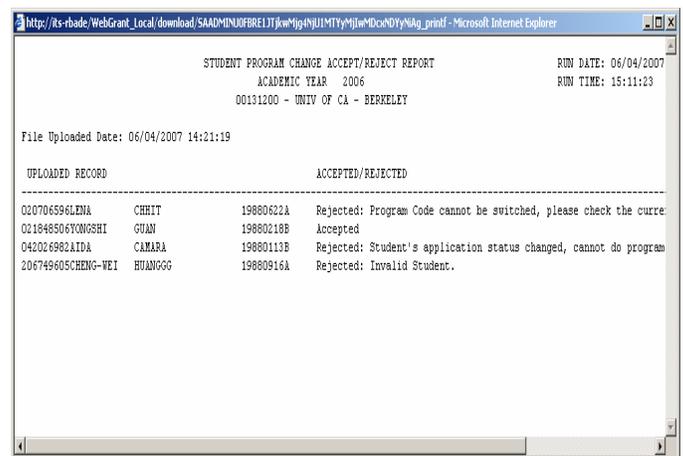
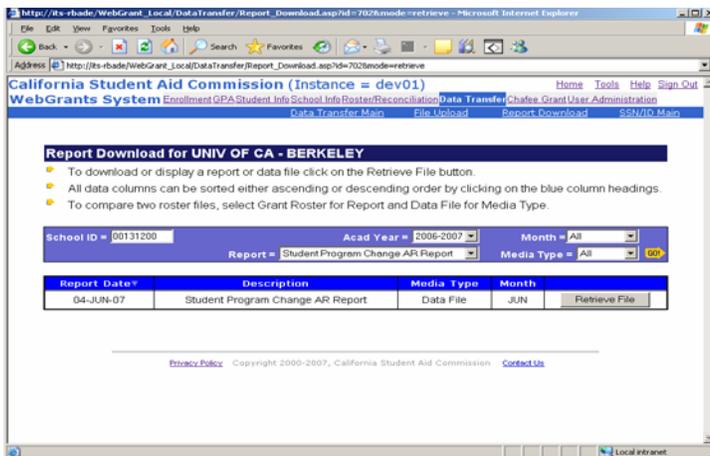
Access

The File Upload Page can be accessed by clicking the [File Upload](#) link on the Data Transfer Main Page (see page 1) or by clicking the [File Upload](#) link on the blue submenu navigation bar.

The files uploaded by schools are processed on a weekly basis. The batch job does all the edits and switches the Program code for the student.

For each file processed the job creates an Accept/Reject report. The report can be viewed by the schools from **WebGrants → Data Transfer Report Download** screen

A new type of Report **Student Program Change AR Report**, will be available in the dropdown list.



Student Program Change Upload Page

File Record Layout Specifications

To facilitate the exchange of electronic files between the Commission and schools, a standard file record layout and standard file header layout have been established for each type of file. To review the standards for the file record layouts, click on the appropriate [File Specification](#) link on the WebGrants Help Center page.

Page Functions

Upload a Data File to the Commission

1. Insure that the School ID field displays the school ID for which to upload a file.
2. Select the type of file to be uploaded from the Type of File drop down list. Only one type of file may be uploaded at the same time.
3. If the file path of the .txt or .xml document to upload is known, type it into the **File Location** field.

If the file path is unknown, click the <Browse> button to locate and select the file from your PC's hard drive or a network drive (see figure 6-1). Once selected, click the <OK> button.

™ The **File Location** field will automatically be populated with the file path.

2. Click the <Upload> button

™ Processing time for the upload depends on the size of the file. Turning gears will appear on the page while the upload is in process.

Upload File Format:

Header Record Layout

Field Name	Description	Length	Sample Values	Position
Academic Year	Academic Year	4	2006, 2007	1-4
Filler	Spaces will be inserted here	8		5-12
School Code	School Code which is uploading the file	8	00131200	13-20
Filler	Spaces will be inserted here	8		21-28
School Name	School Name which is uploading the file	32	UNIV OF CA - BERKELEY	29-60

Detail Record Layout

Field Name	Description	Length	Sample Values	Position
SSN	Social Security number	9	123456789	1-9
First Name	Student's First Name	12	Harry	10-21
Last Name	Student's Last Name	19	Potter	22-40
Middle Name	Student's Middle Name	1	J	41-41
Date Of Birth	Student's Date Of Birth	8	20021125 YYYYMMDD	42-49
Program Code	Student's switched Program Code	1	A, B	50-50