

Johns Hopkins University

DGA 2.0

Entering and Maintaining Departmental Graduate Aid

**Student Systems and Educational
Technologies (SSET)**

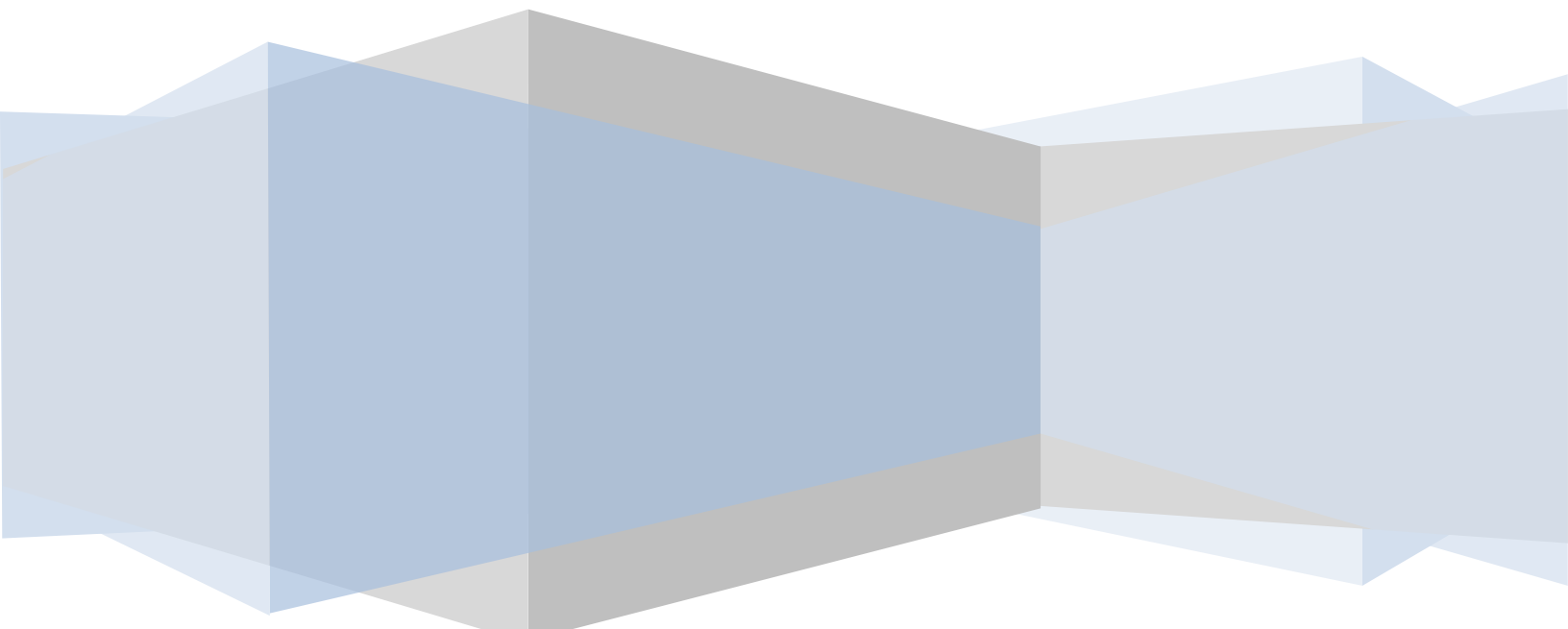


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Module Objectives

After completing this module, you will be able to:

- State the new features and functions available in DGA 2.0
- Retrieve a student record using the DGA search window
- Add a DGA award to a student record
- Update a DGA award for a student record
- Delete a DGA award from a student record
- Reverse a DGA award of a student record
- Upload DGA records from an Excel file
- Generate DGA reports sorted by student, department, or budget number
- Download DGA records as a file in one of several formats.

Departmental Graduate Aid (DGA) 2.0

In Fall 2009, a group of users from across the institution participated in a pilot of the Departmental Graduate Aid (DGA) 2.0. DGA 2.0 makes a number of improvements to the process to award departmental support to students. These include the ability to:

- Access DGA through a user-friendly interface that works on both Macs and PCs;
- Create favorites for commonly used SAP account numbers;
- Upload DGA information using Excel spreadsheet;
- Elimination of the need to use data domains to determine the department to which a student belongs; and
- Run a variety of reports directly from the DGA windows.

Overview of DGA

DGA is the process by which a department plans and awards funds to their graduate or undergraduate students. Department awards may include tuition and fees support, stipends, and fellowships. The entries of salary and fellowships amounts provide departments with a complete award planning tool for departmental graduate aid.

Unlike traditional financial aid awards which are handled through the Student Aid System (SAS), the amount and source of DGA money may differ by student and by award. Due to the complexity and variations, it cannot be managed using rules or algorithms that are used for traditional financial aid processing.

Note: Depending on your division, salary and fellowships will continue to be paid through the current payroll process.

While graduate aid related to tuition and fees flows through the Student Accounts Office, graduate departments track several other key elements such as stipends and fellowships. These types of awards will never flow through to student billing or to payroll, but the amounts of each may be critical for divisional reporting purposes. Remember, salary and fellowships amounts provide complete award planning for departmental graduate aid. Salary and fellowships will continue to be paid through the current payroll process.

Common Transaction Codes Used for DGA

Each division has defined a number of transaction codes to use specifically for the distributed graduate aid process. Transaction codes identify the type of support: tuition, fee, salary, or fellowship.

Your choice of transaction code for department graduate aid awards is important. All transactions are posted to SAS financial aid module. However, only tuition and fee support transactions are posted to the SBS billing module.

The following table contains Public Health Transaction Codes. You will use similar transaction codes for your DGA awards:

Note: The first letter of the transaction code represents the division. In this case, H represents Public Health.

Name	Description
HATUIT	Tuition Support
HAHLTH	Health Insurance Support
HAMATR	Matriculation Fee Support
HAACTV	Activity Fee Support
HALATE	Late Fee Support
HACRSE	Course Fee Support
HAWAGE	Salary Support
HAFELL	Fellowship
HAFEES	Fee Support

Using DGA 2.0

With the implementation of DGA 2.0, you will now access DGA through a different website. If you are a student or a staff member with access to ISIS Self-Service, you will be familiar with the new website. Unlike the administrative application, you can use either a Mac or a PC to access the new DGA website. You can also use any of the following web browsers: Internet Explorer, Safari, Mozilla Firefox, and Opera.

Sign on to DGA

1. Open your web browser.
2. In the address bar, type <https://isis.jhu.edu/>.
3. Click **Sign In**.
4. Enter your **JHED ID** and **JHED password**.

Notice that you now have a link for DGA. If you have other roles, you may have them listed across the top as this graphic below illustrates.

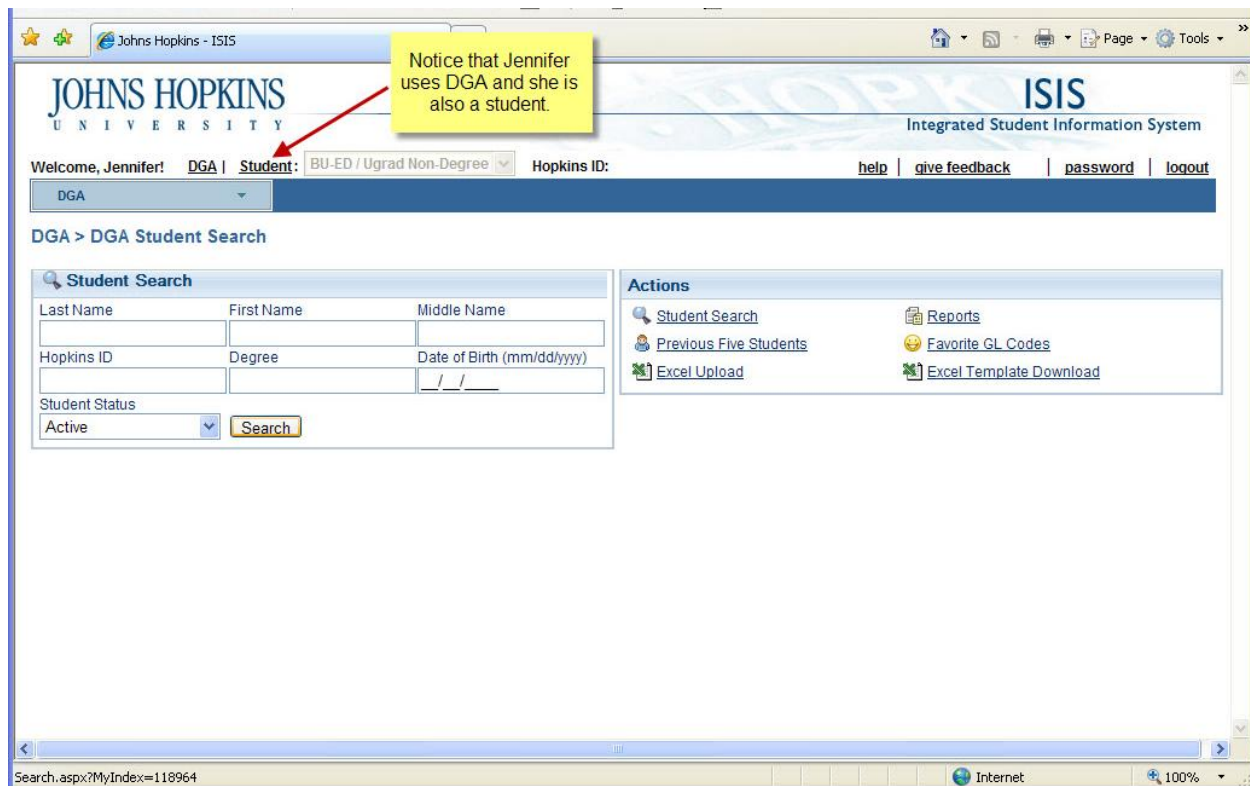


Figure 1.1: DGA Student Search and Actions window

Overview of the DGA Window

The screenshot displays the ISIS Integrated Student Information System interface. At the top, it shows the Johns Hopkins University logo and the ISIS title. Below this is a navigation bar with links for help, give feedback, password, and logout. The main content area is titled 'DGA > DGA Student Search'. It features a 'Student Search' form with fields for Last Name, First Name, Middle Name, Hopkins ID, Degree, Date of Birth (mm/dd/yyyy), and Student Status (set to Active). A 'Search' button is located below the Student Status field. To the right of the search form is an 'Actions' region with links for Student Search, Reports, Previous Five Students, Favorite GL Codes, Excel Upload, and Excel Template Download.

Let's take a closer look at each of the features available from the DGA student Search and Actions window:

- **Student Search** – The Student Search region contains a variety of fields that allow you to lookup student records. These include Last Name, First Name, Middle Name, Hopkins ID, Degree, Date of Birth and Student Status. The Student Status field allows you to limit your search results to active or inactive students and is especially useful if you do not want to see graduated students.

Note: Any combination of the fields can be used to search for students. The most common searches involve Last Name and First Name or Hopkins ID. Wildcard characters can be used in any field if you are unsure of the search terms you want to use.

- **Actions Region** – The Actions Region contains links to commonly used functions available for DGA 2.0. This region is present on every page used for DGA. The features available through the Actions Region include:
 - Student Search
 - Previous Five Students
 - Excel Upload
 - Reports
 - Favorite GL Codes
 - Excel Template Download

Using Wildcard Characters (% and _)

Wild card characters allow you to enter pieces of information and narrow your search criteria. You can use characters such as the percent sign (%), which represents any number of characters, or an underscore (_), which represents a single character. You can also use brackets to include ([]) or exclude ([^]) specific characters from your search criteria.

We have outlined a description and provided examples for each of the wildcard characters in the table.

Wildcard Character	Description	Examples
%	The percent sign represents any number of characters, including letters, spaces, numbers and punctuation.	For example, if you want to search for a specific person, but can't remember if the person's last name is Richardson or Richmond, you can enter Rich% in the Last Name field. The Search Results window displays all persons whose last names begin with Rich, and may include names like Richards, Richardson, Richie, or Richmond.
_	The underscore represents only one character.	For example, you are not sure if the applicant's first name was Jan, Jen, Jon, and so forth. In the First Name field, you can type J_n and it will return anyone a first name that starts with J and ends with N with one character in between the J and N.
[]	The brackets [] represent that you want the results to contain any of the specified character set or character range in that position	If you search for [LD][ao]wson, you would receive the following results: Lawson, Lowson, Dawson, Dowson, and so forth.
[^]	The brackets containing the carat symbol allow you to exclude the specified characters or any characters within a specified range in that position	If you search for M[^a]c%, the system returns all names that begin with M that do not contain A as the second letter. In other words, the search results would contain McDonald, but no MacDonald.

Searching for Students

Let's practice searching for student records using Search for Students region. We will also use wildcard characters to help retrieve our student records.

1. If the Student Search region is not displayed, click the **Student Search** link in the **Actions** region.
2. Enter criteria in one or more of the available fields to retrieve the students for which you want to view, add, or update departmental graduate aid information.
3. Click the **Search** button.

The records meeting your search criteria are displayed in the Student search results region.

The screenshot shows the ISIS Integrated Student Information System interface. At the top, there is a navigation bar with the Johns Hopkins University logo and the ISIS title. Below this, a user welcome message and navigation links are visible. The main content area is titled 'DGA > DGA Student Search'. It features a 'Student Search' form with fields for Last Name (containing 's%'), First Name (containing 'Jennifer'), Hopkins ID, Degree, Date of Birth, and Student Status (set to 'Active'). A 'Search' button is located at the bottom of the form. To the right of the search form is an 'Actions' panel with links for 'Student Search', 'Previous Five Students', 'Excel Upload', 'Reports', 'Favorite GL Codes', and 'Excel Template Download'. Below the search form is a 'Students' table with columns for Last Name, First Name, ID, Date of Birth, Type/SubType, Matriculation Date, Degree, Reporting Division, and Details. The table displays ten records for students named 'Jennifer'.

Last Name	First Name	ID	Date Of Birth	Type/SubType	Matriculation Date	Degree	Reporting Division	Details
Student	Jennifer	00000000	00-00-0000	SPSBE / Grad Degree		MBA	BU	DGA details
Student	Jennifer	00000000	00-00-0000	SPSBE / Grad Degree	06-02-2004	Grad Certificate	ED	DGA details
Student	Jennifer	00000000	00-00-0000	SPSBE / Grad Degree	06-02-2004	MS	ED	DGA details
Student	Jennifer	00000000	00-00-0000	SPSBE / Grad Degree	06-02-2004	Grad Certificate	ED	DGA details
Student	Jennifer	00000000	00-00-0000	SPSBE / Grad Degree		Grad Certificate	ED	DGA details
Student	Jennifer	00000000	00-00-0000	SPSBE / Grad Degree	05-30-2007	MAT	ED	DGA details
Student	Jennifer	00000000	00-00-0000	SPSBE / Grad Degree	08-31-2005	MS	ED	DGA details
Student	Jennifer	00000000	00-00-0000	SPSBE / Grad Degree	06-02-2008	Grad Certificate	ED	DGA details
Student	Jennifer	00000000	00-00-0000	SPSBE / Grad Degree	09-01-2004	MS	ED	DGA details
Student	Jennifer	00000000	00-00-0000	SPSBE / Grad Degree	08-08-2007	Grad Certificate	ED	DGA details
Student	Jennifer	00000000	00-00-0000	SPSBE / Grad Degree		MS	ED	DGA details

Figure 1.2: Student Search Results displaying matching records

Note: [Previous Five Students](#) As you award or modify DGA records, they are added to the Previous Five Students link. You can quickly access the last 5 students that you worked with by clicking the **Previous Five Students** link in the Actions region.

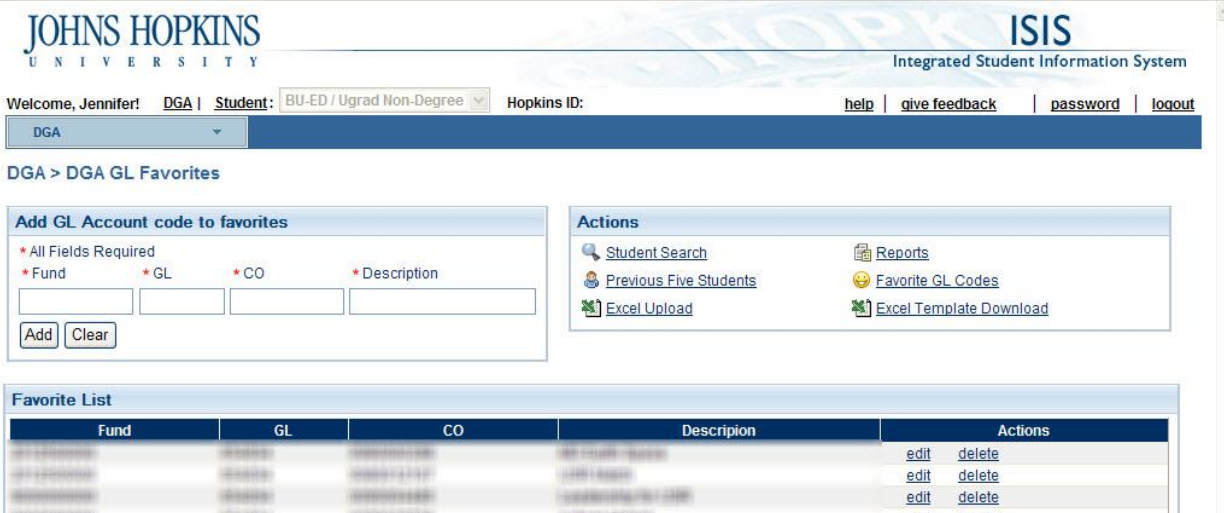
SAP Account Numbers

A key component of the DGA process is the use of SAP account numbers to charge support to a department's budget. DGA 2.0 allows you to create a list of favorite GL codes which you can select from when entering your DGA transactions.

In addition, when you add the SAP account number to the Favorite GL Codes, it is validated to confirm that it is an active and valid SAP account. If the account is invalid for any reason, you will not be able to save it to your favorites list. This helps prevent erroneous account numbers from being entered through DGA.

Adding an SAP Account to Your Favorites

1. In the **Actions** region, click on **Favorite GL Codes**  [Favorite GL Codes](#)



The screenshot shows the ISIS Integrated Student Information System interface. At the top, there is a header with the Johns Hopkins University logo and 'ISIS Integrated Student Information System'. Below the header, there is a navigation bar with 'DGA' selected. The main content area is titled 'DGA > DGA GL Favorites'. On the left, there is a form titled 'Add GL Account code to favorites' with fields for Fund, GL, CO, and Description, and 'Add' and 'Clear' buttons. On the right, there is an 'Actions' menu with links for Student Search, Previous Five Students, Excel Upload, Reports, Favorite GL Codes, and Excel Template Download. Below the form and actions is a 'Favorite List' table with columns for Fund, GL, CO, Description, and Actions (edit, delete).

2. In the **Fund** field, type the 10-digit fund of your SAP account.
3. In the **GL** field, type the 6-digit general ledger segment of your SAP account.
4. In the **CO** field, type the 10-digit cost object/cost center of your SAP account.
5. In the **Description**, type a name so you will recognize this 26 digit SAP account.
6. Click **Add**.

The SAP account is added to your Favorites list and is now available to select from the drop-down on the GL field when adding or updating DGA transactions.

Note: Use the Edit or Delete links to modify or remove an SAP account number from your Favorites list.

Working with a Student Record

Each row in the Student search results represents a student. You can review a student’s DGA award by clicking the **DGA Details** link. This will display the DGA Add Edit window for the selected record. Let’s review each of these fields more closely.

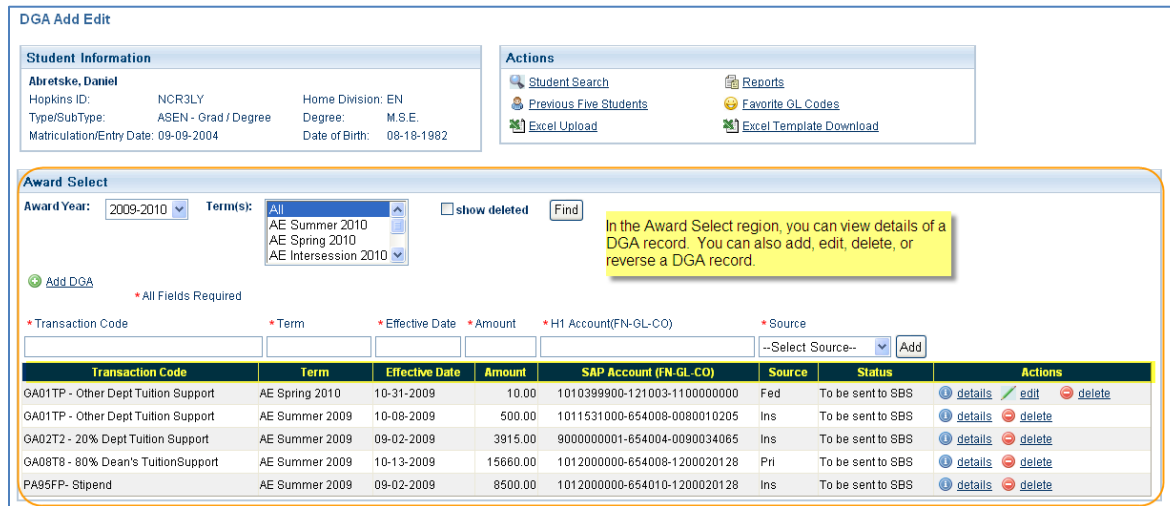


Figure 1.3: DGA Award Select region

The Award Select region allows you to view the details for a student’s DGA awards by Award Year and Term. You will use this region to add awards, edit existing awards, delete/reverse awards, and view award details. Let’s look at each of these functions more closely:


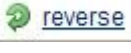

- **Add DGA** – [Add DGA](#) this link allows you to add a new award to the DGA record. Clicking on the link brings up empty fields for the data described below.

* Transaction Code * Term * Effective Date * Amount * SAP Account(FN-GL-CO) * Source

 04/09/2010 --Select Source--

- Transaction Code – identifies the type of support: tuition, fee, salary, fellowship.
- Term – the semester for the award.
- Effective Date – the date when the award is posted to the student’s account.
- Amount – The dollar value of the award.
- SAP Account (FN-GL-CO) – the general ledger account for the transaction.
- Source – The source of the funding for the award. This relates to the CUFS budget number. The choices are Federal (grants and contracts), State (grants and contracts), Private (gifts, grants and contracts), International (gifts, grants and contracts), and Institutional (general funds, endowment income, etc.).

- **Details** – [details](#) this link in the Actions field at the end of an award row displays the Details window for the selected transaction.

- **Edit** –  this link allows you to edit awards that have not yet been set to the student's account and the general ledger. The Edit link will only appear for those awards that are eligible to be edited.
- **Reverse** –  this link allows you to reverse an award that was previously entered. This link will only appear for those awards eligible to be reversed.
- **Delete** –  this link allows you to delete an award that you have previously awarded. This link will only appear for those awards that are eligible to be deleted.

Understanding the Details Link

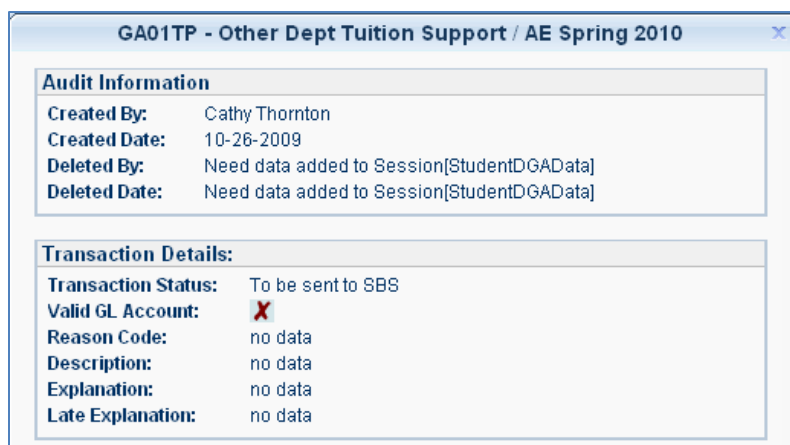


Figure 1.4: Details link window

The Details link provides additional information, including:

- audit information such as who created or modified the record and when
- transaction details which includes whether the transaction has been sent to the students SBS account and if the general ledger/SAP account number is valid.
 - Transaction Statuses may include any of the following:
 - To Be Sent to SBS
 - Sent to SBS
 - Reversed
 - Posted to GL
 - Reason Code – All reversed DGA transactions must have a Cost Transfer Reason. When reversing a DGA transaction, use the LOV to select the appropriate reason.
 - Explanation – this field allows you to type any additional information for the cost transfer in the free-form text field.
 - Late Explanation – When the reversal occurs more than 90 days after the original transaction date for federal grants and contracts, you must type an additional explanation for the cost transfer.

Creating and Maintaining a DGA Record

Adding a DGA Award

Now that we have a basic understanding of DGA and the windows used, let's practice entering DGA awards.

1. **Search** for a student.
2. Click the **DGA Details** link.

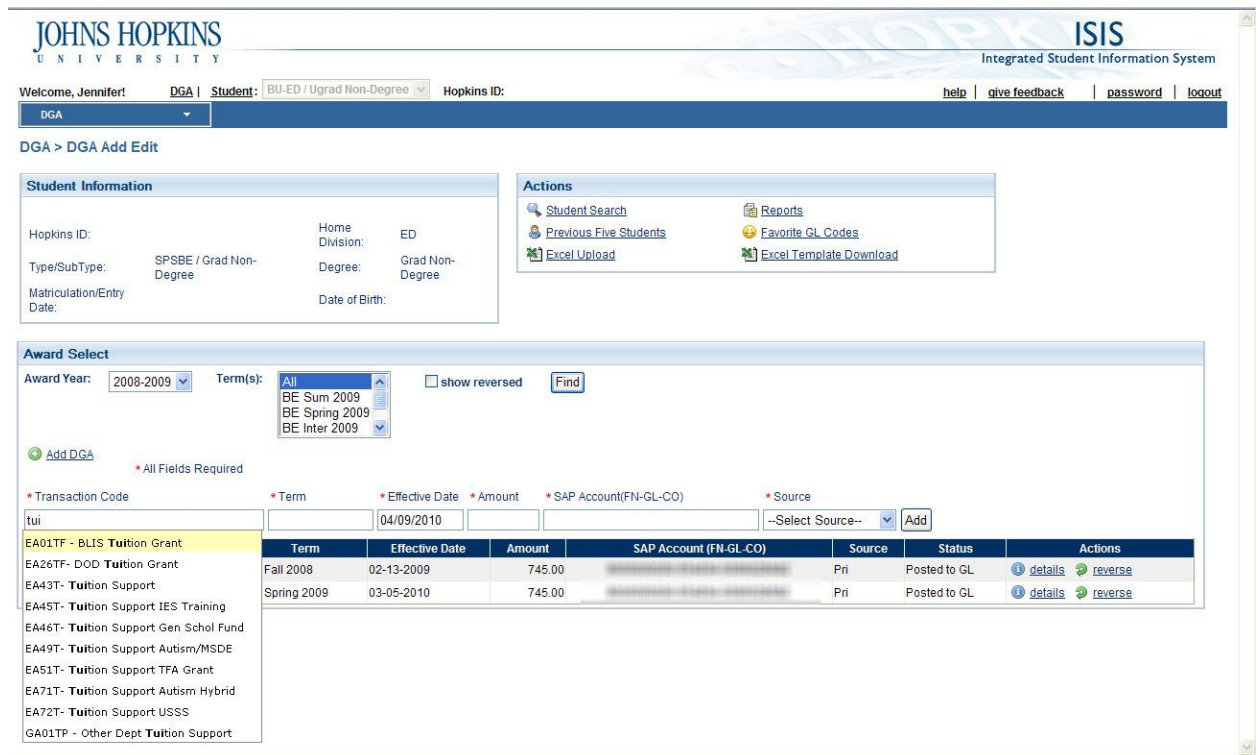
3. Click the **Add DGA** link. 

The add DGA record fields are displayed.

* Transaction Code * Term * Effective Date * Amount * SAP Account(FN-GL-CO) * Source

 04/09/2010 --Select Source--

4. In the **Transaction Code** field, type a transaction code for the record. Once you begin typing, the LOV will appear as a pull-down menu.



JOHNS HOPKINS UNIVERSITY **ISIS**
Integrated Student Information System

Welcome, Jennifer! DGA | Student: BU-ED / Ugrad Non-Degree Hopkins ID: help | give feedback | password | logout

DGA > DGA Add Edit

Student Information

Hopkins ID: Home Division: ED
 Type/SubType: SPSBE / Grad Non-Degree Degree: Grad Non-Degree
 Matriculation/Entry Date: Date of Birth:

Actions

Student Search Reports
 Previous Five Students Favorite GL Codes
 Excel Upload Excel Template Download

Award Select

Award Year: 2008-2009 Term(s): All show reversed Find

 * All Fields Required

* Transaction Code * Term * Effective Date * Amount * SAP Account(FN-GL-CO) * Source

Transaction Code	Term	Effective Date	Amount	SAP Account (FN-GL-CO)	Source	Status	Actions
EA01TF - BLIS Tuition Grant							
EA26TF- DOD Tuition Grant	Fall 2008	02-13-2009	745.00		Pri	Posted to GL	details reverse
EA43T- Tuition Support	Spring 2009	03-05-2010	745.00		Pri	Posted to GL	details reverse

Transaction Code LOV (Left): tui, EA01TF - BLIS Tuition Grant, EA26TF- DOD Tuition Grant, EA43T- Tuition Support, EA45T- Tuition Support IES Training, EA46T- Tuition Support Gen Schol Fund, EA49T- Tuition Support Autism/MSDE, EA51T- Tuition Support TFA Grant, EA71T- Tuition Support Autism Hybrid, EA72T- Tuition Support USSS, GA01TP - Other Dept Tuition Support

5. In the **Term** field, type the code for the academic period for the transaction, or use the pull-down menu that appears once you begin entering the code.
6. The **Effective Date** defaults to today's date. Remember this is the date that the DGA award will post to the student's account.

7. In the **Amount** field, type the dollar amount for the award.
8. In the **SAP Account (FN-GL-CO)** field, type or use the LOV which is established by your GL Favorite Codes to enter the appropriate SAP account numbers.
9. In the **Source** field, type or use the LOV to select the source of the funds for the transaction.
10. Click **Add**.

The new transaction is added to the grid displaying all of DGA awards for the defined time period.

Updating an Existing DGA Award

As we discussed earlier, you may need to periodically change the amount for an award or update the general ledger budget number, effective date, or transaction code for an existing DGA award. The Edit link will only appear for those awards that eligible to updated.

1. **Search** for a student.
2. Click the **DGA Details** link.

Award Select

Award Year: 2009-2010 Term(s): All
 AE Summer 2010
 AE Spring 2010
 AE Interession 2010

show deleted Find

[Add DGA](#)

Transaction Code	Term	Effective Date	Amount	SAP Account (FN-GL-CO)	Source	Status	Actions
GA00TD - Other Dean's Support	AE Spring 2010	01-11-2010	1000.00	1010400000-121003-1100000000	Sta	To be sent to SBS	details edit delete

3. Click the **Edit** link.

The fields for the selected row become editable.

Award Select

Award Year: 2009-2010 Term(s): All
 AE Summer 2010
 AE Spring 2010
 AE Interession 2010

show deleted Find

[Add DGA](#)

Transaction Code	Term	Effective Date	Amount	SAP Account (FN-GL-CO)	Source	Status	Actions
GA00TD - Other Dean's Support	AE Spring 2010	01-11-2010	1000.00	1010400000-121003-1100000000	State of MD	To be sent to SBS	Update Cancel

4. Edit the information in the fields as needed to reflect the correct award data.
5. Click **Update** to save your changes.

Understanding Reversing vs. Deleting a DGA Award

ADD TEXT ON THE DIFFERENCE BETWEEN REVERSE VS. DELETE

Deleting a DGA Award

Awards can be deleted if they have not yet been sent to the Student Aid System (SAS). This means that the deletion of an award must happen before the system updates the night the award is added.

1. **Search** for a student.
2. Click the **DGA Details** link.

Student Information

Actions

Award Select

Transaction Code	Term	Effective Date	Amount	SAP Account (FN-GL-CO)	Source	Status	Actions
GA02T2 - 20% Dept Tuition Support	AE FALL 2009	08-24-2009	3915.00	9000000000-654004-0090030884	Ins	Posted to GL	details reverse
GA08T8 - 80% Dean's TuitionSupport	AE FALL 2009	08-24-2009	15660.00	1012000000-654008-1200020128	Ins	Posted to GL	details reverse
GA45HF - Health Insurance Mandatory Fee	AE FALL 2009	08-24-2009	838.50	9000000000-654012-0090030884	Ins	Posted to GL	details reverse
GA00TD - Other Dean's Support	AE Spring 2010	01-11-2010	2500.00	1010400000-121003-1100000000	Sta	To be sent to SBS	details edit delete

3. Click the **Delete** link at the end of the row for which you want delete the DGA award.

The Delete Confirmation message appears.

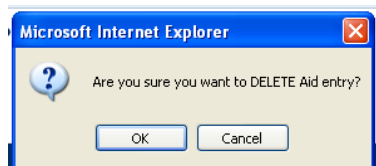


Figure 1.5: Delete Confirmation message

4. Click **OK**.

The award is removed from the Award Select region for the student.

Reversing a DGA Award

When you reverse the existing record, the award is reduced \$0.00 and marked as cancelled in the Student Aid System (SAS). The transaction is also expired or reversed in the Student Billing System (SBS). For reversed transactions, the reason is captured in the Notes field.

1. **Search** for a student.
2. Click the **DGA Details** link.

Transaction Code	Term	Effective Date	Amount	SAP Account (FN-GL-CO)	Source	Status	Actions
GA02T2 - 20% Dept Tuition Support	AE FALL 2009	08-26-2009	3915.00	1012000000-654004-1207980008	Ins	Posted to GL	details reverse
GA08T8 - 80% Dean's TuitionSupport	AE FALL 2009	08-26-2009	15660.00	1012000000-654008-1200020128	Ins	Posted to GL	details reverse
GA45HF - Health Insurance Mandatory Fee	AE FALL 2009	08-26-2009	838.50	1012000000-654012-1207980008	Ins	Posted to GL	details reverse

3. Click the **Reverse** link at the end of the row for which you want delete the DGA award.

The Reason and Explanation fields appears.

Transaction Code	Term	Effective Date	Amount	SAP Account (FN-GL-CO)	Source	Status	Actions
GA02T2 - 20% Dept Tuition Support	AE FALL 2009	08-26-2009	3915.00	1012000000-654004-1207980008	Ins	Posted to GL	details reverse
GA08T8 - 80% Dean's TuitionSupport	AE FALL 2009	08-26-2009	15660.00	1012000000-654008-1200020128	Ins	Posted to GL	details reverse
GA45HF - Health Insurance Mandatory Fee	AE FALL 2009	08-26-2009	838.50	1012000000-654012-1207980008	Ins	Posted to GL	details close

*** Required Fields**

*** Reason Code:** Administrative Error *** Explanation:** *** Late Explanation:** [Reverse](#)

Incorrect budget number (GL number) charged, office error, sponsored account closed (terminated)

Figure 1.6: Reason and Explanation fields for Reversals

Note: Five reasons appear in the Reason Code pull-down menu: Enrollment status change, Student changed major / dept, Object Code Error, Administrative Error, and Transposition Error. Of these, only Enrollment status change and Administrative Error require the explanation fields to be filled. If the award was reversed for one of the other three reasons, the Explanation fields will be locked.

4. Complete the required fields
5. Click **Reverse**.

The DGA award record disappears from the Award Select region and the message "Transaction Reversed Successfully" appears.

Note: Select the show reversed box and click Find to display the reversed awards in the Award Select region.

Uploading DGA Records Using Excel

Many of you manage the information used to award DGA support to students through Microsoft Excel™ spreadsheets. With DGA 2.0, you can now upload an Excel spreadsheet of DGA awards.


The spreadsheet must be an Excel file with an .XLS extension. It must also contain the nine columns listed in the *Requirements to Upload DGA Records* section. Your spreadsheet may have additional information that may be of use to you (for example, you may have an additional column titled “Notes” for your own use), but the extra columns will be trimmed when uploaded to ISIS. In other words, only the columns relevant to DGA will be uploaded.

Requirements to Upload DGA Records

There are several requirements to consider when uploading your DGA records. These include:

- Only upload Excel 2003 (.XLS) files – Other versions of Excel (2007) or other spreadsheet programs, such as a Mac’s Numbers program will not work.
- Do not embed any macros or other formulas into your spreadsheet.
- Confirm that your spreadsheet contains the columns listed below. They must be named exactly as they are presented, below:
 - Last Name
 - First Name
 - Hopkins ID
 - Transaction Code
 - Effective Date
 - Term
 - Amount
 - SAP Account #
 - Fund source

Downloading the Excel template

1. In the **Actions region**, click **Excel Template Download**.  [Excel Template Download](#)
2. To use the template immediately, click **Open**.
3. To simply download the file to your computer, click **Save** and follow the prompts to save the file to your computer or shared drive.

Note: Remember you must save the file as an Excel 2003 file with an extension of .XLS.

Uploading DGA records using an Excel file

As noted above, the Excel file you want to upload to ISIS should have the same column headings as those in the template. Here is an example with two DGA records to be uploaded. The file can contain additional columns and worksheets, but it must contain the columns shown below in order to successfully be uploaded.

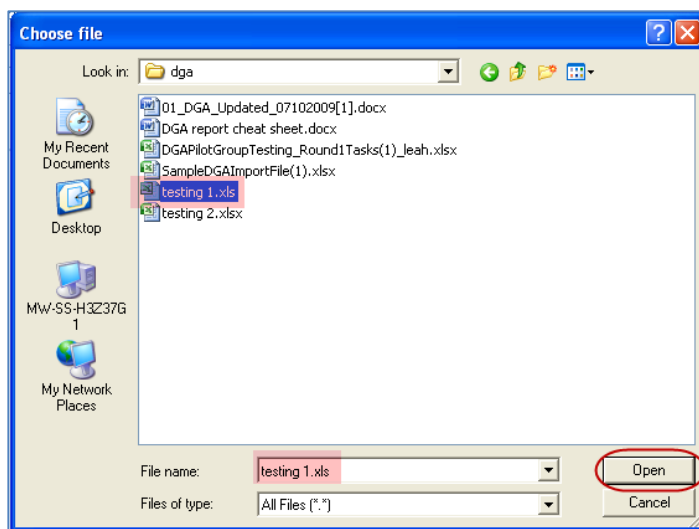
	A	B	C	D	E	F	G	H	I
1	Last Name	First Name	ID	Transaction Code	Effective Date	Term	Amount	SAP Account #	Fund Source
2	Wu	Hao Fang		GA02T2 - 20% Dept Tuition Support	1/15/2010	AE Spring 2010	3915	1010399900-100070-1030000000	Private
3	Riley	Joseph		GA08T8 - 80% Dean's TuitionSupport	1/15/2010	AE Spring 2010	15660	1010399900-100071-1030000000	Private
4									
5									
6									
7									

After saving the file, it can be uploaded.

1. In the **Actions** region, click **Excel Upload**.

2. Click **Browse...**

The Choose File dialog window appears.



3. Select the Excel file that you wish to upload from your computer or shared drive and click **Open**.
4. Click **Upload** to begin the upload process.

The DGA Excel Upload results window appears. This window summarizes any issues with your Excel Upload and allows you to make immediate corrections to the data or export it to Excel for additional review and correction.

The DGA Excel Upload page contains three import sections:

- **Upload Summary** – this region provides the location for the file that you are attempting to upload, as well as the number of valid and invalid records.
- **Invalid Hopkins IDs** – this region lists any students where the name and Hopkins ID provided do not match the information in ISIS. These records cannot be imported.
- **Import Listing** – this region lists all records (including those that may require correction) that are eligible for import to ISIS. The Import into ISIS link will not become available until all records are valid in this region.

Note: This process may take a few minutes depending on the number of records in your Excel spreadsheet.

The screenshot displays the ISIS DGA Excel Upload interface. At the top, it shows the user's name (Jennifer) and the system name (ISIS Integrated Student Information System). The main content area is divided into three sections:

- Upload Summary:** Shows the file path (H:\Desktop Stuff\DGA_UploadSample_11232009.xls), 6 valid entries, and 12 invalid entries.
- Invalid Hopkins IDs:** A table listing records where the name and Hopkins ID do not match. It includes columns for Last Name, First Name, ID, Transaction Code, Effective Date, Term, Amount, SAP Account #, and Fund Source.
- Import Listing:** A table listing all records eligible for import, including those that may require correction. It includes columns for Last Name, First Name, ID, Transaction Code, Effective Date, Term, Amount, SAP Account #, Fund Source, Row Validity, and Actions.

5. As you make updates or corrections, click the **Update Corrections** link to have the system evaluate the changes and confirm that the row is valid.
6. If you wish to remove all invalid rows, click the **Remove Invalid Rows** link. This removes the problem records and allows you to move forward with the import to ISIS.
7. Click **Import into ISIS** to import the records to ISIS. All invalid data must be removed for the Import into ISIS link to become available.

Note: Click Export to Excel to get an Excel spreadsheet of the data you are about to import.

Note: This process may take a few minutes depending on the number of records in your Excel spreadsheet.

8. The **All Records Successfully Imported** message appears when the import has completed.

The screenshot shows the 'DGA > DGA Excel Upload' page in the ISIS system. The 'Upload Summary' indicates 6 valid entries and 3 invalid entries. The 'Invalid HopkinsIDs' table lists the following records:

Last Name	First Name	ID	Transaction Code	Effective Date	Term	Amount	SAP Account #	Fund Source
		ZZA477	GA02T2 - 20% Dept Tuition Support	1/15/2010	AE Spring 2010	3,915.00		ins
		JWZOZ4	GA08T8 - 80% Dean's TuitionSupport	1/15/2010	AE Spring 2010	15,660.00		ins
		ZZA477	GA08T8 - 80% Dean's TuitionSupport	1/15/2010	No Term	15,660.00		ins

At the bottom of the page, a green message box states: **All records successfully imported.** A red arrow points to this message. Below the message are links for [Import into ISIS](#), [Update Corrections](#), [Remove Invalid Rows](#), and [Export to Excel](#).


DGA Report

The DGA Report allows you to quickly view all of the DGA awards for your department, a single student or if you have permissions, the entire division.

There are currently two versions of the DGA report. One is a general and returns all students for a school/department. The other allows you to specify a student or group of students by Hopkins ID.

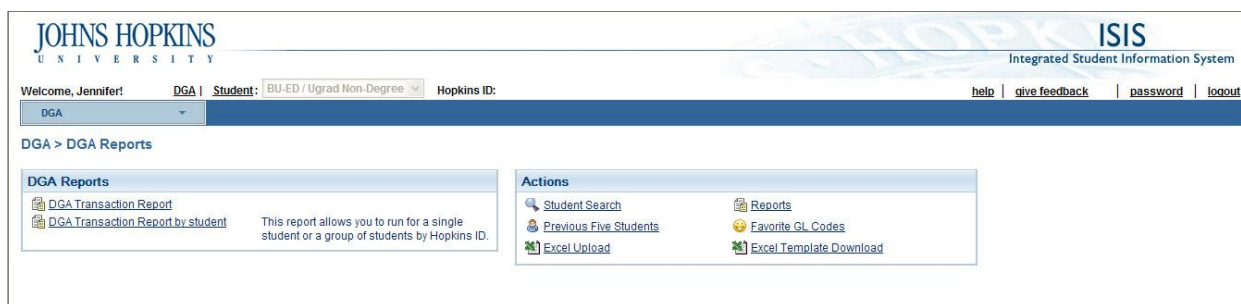
Both of these reports are available directly from the DGA application, as well as from SQL Server Reporting Services (SSRS). You can access SSRS at: <https://srs.isis.jhu.edu>. If you plan to use SSRS, the DGA reports are located at: Home > ISIS > General > DGA.

Accessing the DGA Reports

1. In the **Actions region**, click **Reports**.  [Reports](#)

The DGA Reports window appears with the two reports currently available listed under the DGA Reports region.

- *DGA Transactions Report*
- *DGA Transactions by Student*



Running the DGA Transactions by Student Report

You can run the DGA report for a single student or a group of students using Hopkins IDs. When running the report for a group of students, you must separate the Hopkins IDs with a comma.

This report includes subtotals based on your Sort By selection. The Subtotals are provided for tuition support, fees support, salary/fellowship support, and the total DGA award package.

1. In the **Actions region**, click **Reports**.
2. Click **DGA Transactions Report by Student**.

The Student Transaction report parameters appear.

3. In the **Award Years** field, select the academic years for which you wish to see data.

Note: Click the **Select All** box to get data for all available academic years. DGA data in ISIS is only available since 2004-2005.

- Select **Yes** for **Include Deleted** if you wish to see the deleted transactions on your report. Otherwise, accept the default of No.
- In the **Sort By** field, select **Department**, **Budget Number** or **Student** to determine how the records will be grouped on your report results.

Note: Your **Sort By** selection determines how your subtotals will be displayed.

The screenshot shows the 'DGA > DGA Reports' page. Under 'DGA Reports', there are links for 'DGA Transaction Report' and 'DGA Transaction Report by student'. The 'Actions' section includes 'Student Search', 'Previous Five Students', 'Excel Upload', 'Reports', 'Favorite GL Codes', and 'Excel Template Download'. The 'Student Transaction Report' form has the following fields: 'Award Years' (2009-2010), 'Include Deleted?' (No), 'Sort By' (Department), and 'Hopkins ID' (R, F). A 'View Report' button is circled in red.

- In the **Hopkins ID** field, type a Hopkins ID for a single student or a comma-separated list of Hopkins IDs for multiple students.

Note: Do **NOT** select the Null checkbox as this will return all students for the selected award years.

- Click **View Report**.

Your report results are displayed

The screenshot shows the 'Student Transaction Report' results page. The 'View Report' button is circled in red. The table below shows the transaction details for student Biswal, Debika.

Award Years	Student Name	Hopkins ID	Trans Term	Trans Code	Trans Code Description	Amount
2009-2010	Biswal, Debika	R	PH 2009-10 1	HAHLTH- Health Ins Support	Public Health Health Ins Support	
2009-2010	Biswal, Debika	R	PH 2009-10 1	HATUIT- Tuition Support	Public Health Tuition Support	\$0
2009-2010	Biswal, Debika	R	PH 2009-10 1	HATUIT- Tuition Support	Public Health Tuition Support	\$0
2009-2010	Biswal, Debika	R	PH 2009-10 S	HAHLTH- Health Ins Support	Public Health Health Ins Support	
2009-2010	Biswal, Debika	R	PH 2009-10 S	HATUIT- Tuition Support	Public Health Tuition Support	\$0

Running the DGA Transactions Report by Department/School

You can run the DGA report for all students in a Department or Division. The selection criteria may vary based on whether or not your division uses Data Domains in ISIS. If your division uses Data Domains, you will use the Department drop-down to specify your department. If your division has chosen to not use data domains, you will select your department or program from the Academic Program drop-down.

This report includes subtotals based on your Sort By selection. The Subtotals are provided for tuition support, fees support, salary/fellowship support, and the total DGA award package.

1. In the **Actions** region, click **Reports**.
2. Click **DGA Transactions Report**.

The Student Transaction report parameters appear.

The screenshot shows the ISIS Integrated Student Information System interface. At the top, there is a header with the Johns Hopkins University logo and the ISIS logo. Below the header, there is a navigation bar with the text "DGA" and "DGA > DGA Reports". The main content area is divided into two sections: "DGA Reports" and "Actions". The "DGA Reports" section contains a link for "DGA Transaction Report" and a description: "This report allows you to run for a single student or a group of students by Hopkins ID." The "Actions" section contains links for "Student Search", "Previous Five Students", "Excel Upload", "Reports", "Favorite GL Codes", and "Excel Template Download". Below these sections is the "Transaction Report" form, which includes several fields: "School", "AwardYears", "Term", "Sort By", "Hopkins ID", "Academic Program", "Include Deleted?", and "Include Sub Totals". A "View Report" button is located on the right side of the form.

3. In the **School** drop-down, select your division. The selection in this field determines the values in several other fields for this report.

Note: After you select the School, it may take a moment for the Award Year and the Term list of values to populate.
4. In the **Award Years** field, select the academic years for which you wish to see data.
5. In the **Terms** field, select the terms or academic periods for which you wish to see data. You will only have values for the award years selected in Step 4.
6. Select **Yes** for **Include Deleted** if you wish to see the deleted transactions on your report. Otherwise, accept the default of No.
7. In the **Sort By** field, select **Department**, **Budget Number** or **Student** to determine how the records will be grouped on your report results.
8. Select **Yes** for **Include Sub-totals**, to have subtotals displayed on your report. You should select No if you want to export to Excel and manipulate the data for charts or other purposes.

9. Leave the **Hopkins ID** field blank and the **Null** checkbox selected.

Note: If you wish to turn the report for a specific student or group of students, clear the Null checkbox and enter a comma separated list of Hopkins IDs.

10. In the **Department** or **Academic Program** drop-down, select the values that reflect the area for which you want to view DGA records. You can select multiple values in each of these fields. You should not select values in both fields.
11. Click **View Report**.

Your report results are displayed

The screenshot shows the 'Transaction Report' interface. At the top, there are search filters: School (ASEN), Award Years (2009-2010, 2008-2009), Term (AE FALL 2008, AE FALL 2009), Include Deleted? (No), Sort By (Department), and Department (AS Anthropology, AS Biology). A 'View Report' button is on the right. Below the filters is a navigation bar with '1 of 24' and '100%' displayed. A red circle highlights the '1 of 24' and '100%' area. Below the navigation bar is a red header box for the report. The main content is a table with columns: Award Years, Student Name, Hopkins ID, Trans Term, Trans Code, and Trans Code Description. The table lists several transactions for Abigail Baim-Lance.

Award Years	Student Name	Hopkins ID	Trans Term	Trans Code	Trans Code Description
2009-2009	Baim-Lance, Abigail	VPI28G	AE FALL 2008	PA08TB- Dean TU Suppt	A/S Dean Tuition Support
2008-2009	Baim-Lance, Abigail	VPI28G	AE FALL 2008	PA25TP- Dept TU Suppt	A/S Department Tuition Support
2008-2009	Baim-Lance, Abigail	VPI28G	AE FALL 2008	PA45HF- Hlth Ins Fee Suppt	A/S Health Insurance Fee Support
2009-2010	Baim-Lance, Abigail	VPI28G	AE FALL 2009	PA25TP- Dept TU Suppt	A/S Department Tuition Support

Exporting DGA Report Results to Excel

The DGA Report results can be exported to Excel. You can also export to several other formats following the same instructions.

1. Run your report.

The screenshot shows the 'Student Transaction Report' interface. At the top, there are search filters: Award Years (2009-2010), Include Deleted? (No), Sort By (Student), and Hopkins ID (F...R...), with a NULL checkbox. A 'View Report' button is on the right. Below the filters is a navigation bar with '1 of 1' and '100%' displayed. A red circle highlights the 'Select a format' and 'Export' options. Below the navigation bar is a table with columns: Award Years, Student Name, Hopkins ID, Trans Term, Trans Code, and Trans Code Description. The table lists two transactions for Debika Biswal. At the bottom right, there are summary statistics for Total Tuition Support and Total Fees Support.

Award Years	Student Name	Hopkins ID	Trans Term	Trans Code	Trans Code Description
2009-2010	Biswal, Debika	PH2009-10 S	PH 2009-10 S	HAHLTH- Health Ins Support	Public Health Health Ins Support
2009-2010	Biswal, Debika	PH2009-10 S	PH 2009-10 S	HATUIT- Tuition Support	Public Health Tuition Support

Total: 5

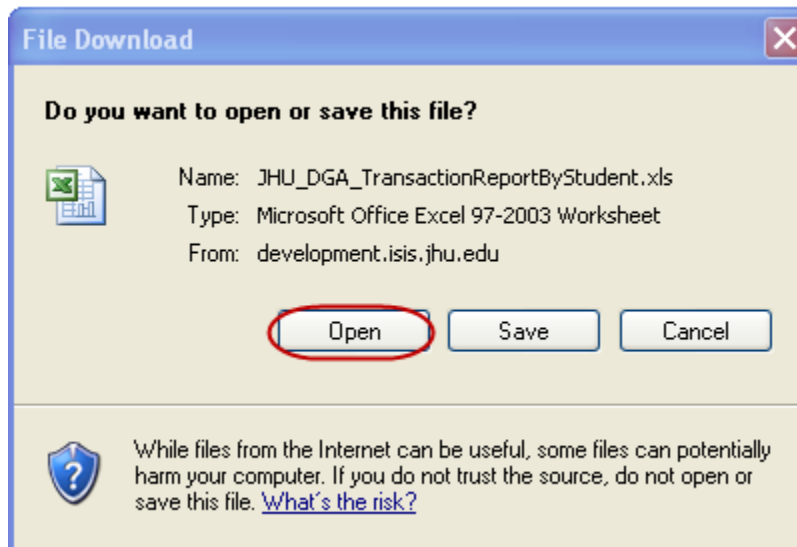
Total Tuition Support: \$15
Total Fees Support: \$5

2. Click the **Select a Format** drop-down, select **Excel**.

When you select Excel, the Export link will become available.

3. Click **Export**.

The File Download dialog window appears.



4. Click **Open** to open the file or click **Save** to save the file to your computer or shared drive.

Module Summary

Departmental Graduate Aid

Departmental Graduate Aid (DGA) is the process by which a department awards departmental funds to their graduate or undergraduate students. Department awards may include tuition and fees support, stipends, and fellowships. ISIS uses a custom window that allows departments to enter and maintain departmental graduate aid awards for students.

Search Data

ISIS allows you to search for students by any combination of name, Hopkins ID, degree, and date of birth. Once you have found the student you're searching, you can then view his or her DGA record by clicking on DGA details at the end of the entry row for the student.

Wild card characters allow you to enter pieces of information and narrow your search criteria. You can use characters such as the percent sign (%), which represents any number of characters, or an underscore (_), which represents a single character.

Transaction Codes

Each division has defined a number of transaction codes to use specifically for the distributed graduate aid process. The transaction codes identify the type of support: tuition, fee, salary, or fellowship.

Add, Update, Delete, or Reverse a DGA Award

ISIS allows you to create DGA award records and update them as needed. You may also delete the record the day it is created or, if at least one day has passed since the record was created, reverse the record.

Downloading and Uploading Excel Files

An Excel template is available for you to download and to enter data into. A populated Excel file can also be uploaded into ISIS, creating new records.

DGA Report

The DGA Report allows you to quickly review entered DGA awards. You can search for records by school or by Hopkins IDs. Reports can be sorted by student, department or budget number. They can also be exported as one of a number of file formats.

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