

# Running the Organization Users Report in ScholarshipUniverse

We are glad to share that as of Fall 2023, departmental ScholarshipUniverse users can run the Organization Users report to determine who has access to their departmental funds and in which roles. This document contains instructions on how to run the report and format it in a way that will be more useful to users.

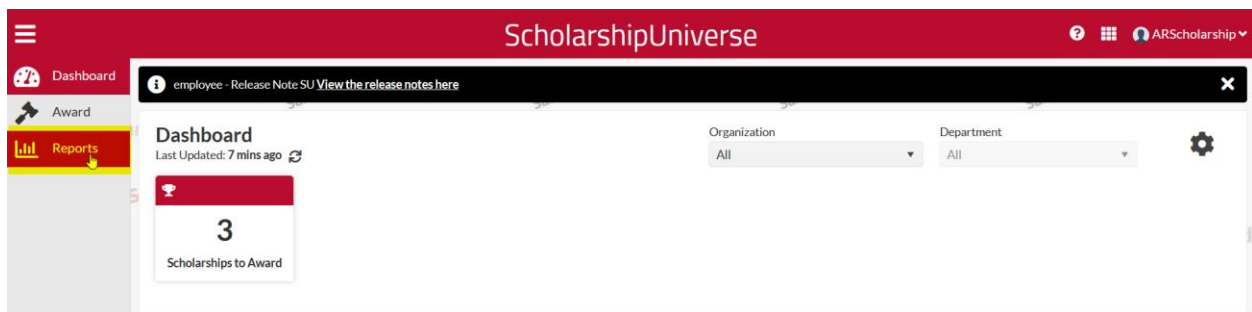
If you have questions about this report or other aspects of using ScholarshipUniverse, please reach out to the Scholarships team at [osfa5@uga.edu](mailto:osfa5@uga.edu).

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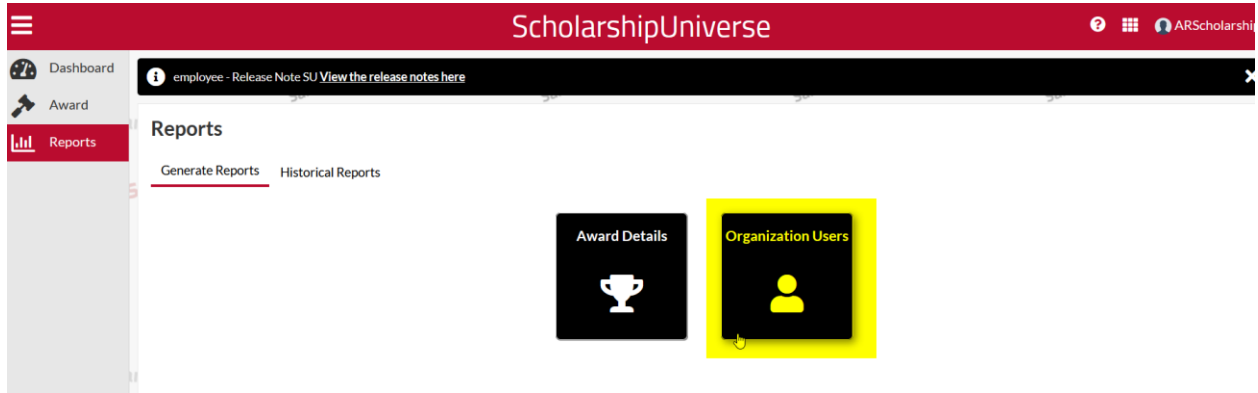
## Requesting the Report

Log in to ScholarshipUniverse at <https://uga.scholarshipuniverse.com>. From your Dashboard, select the “Reports” option on the left side menu:



Click on the “**Organization Users**” tile.

- **Note:** Depending on your user role, you may have more report options to choose from. These screenshots have been captured from the Scholarship Liaison role.



The below menu will appear. If you want to see users for a specific department, fill out both the “**Organization**” and “**Department**” boxes. If you want to see users for the entire Unit, you only need to fill out the “**Organization**” box. You can also search by specific roles or specific users. When you have specified your search parameters, click “**Submit.**”

A screenshot of a dialog box titled "Organization Users Reporting" with a close button (X) in the top right corner. Below the title is a descriptive sentence: "Provides list of all active users with roles and assigned organization and departments." There are four input fields: "Organization" containing "Franklin College of Arts and Sciences", "Department" containing "English", "Roles" (empty), and "Specific Users" (empty). At the bottom right, there are two buttons: "Submit" (highlighted with a yellow background) and "Cancel".

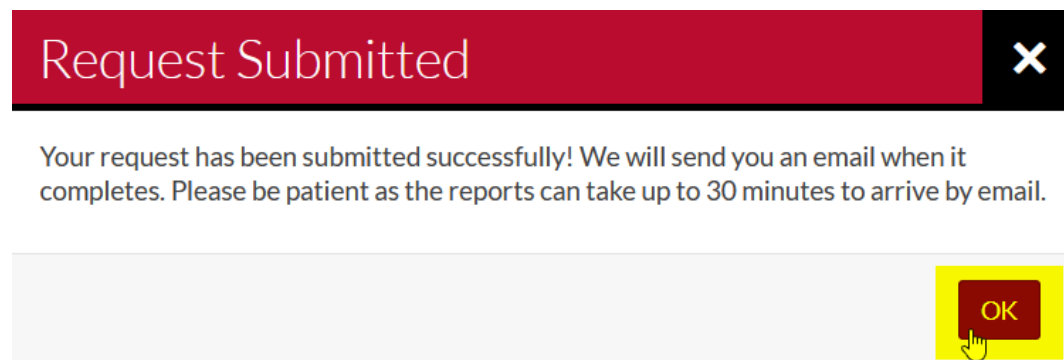
**Examples:**

- If I want to see all users for the English Department, I would select “Franklin College of Arts and Sciences” as the Organization, and “English” as the Department.

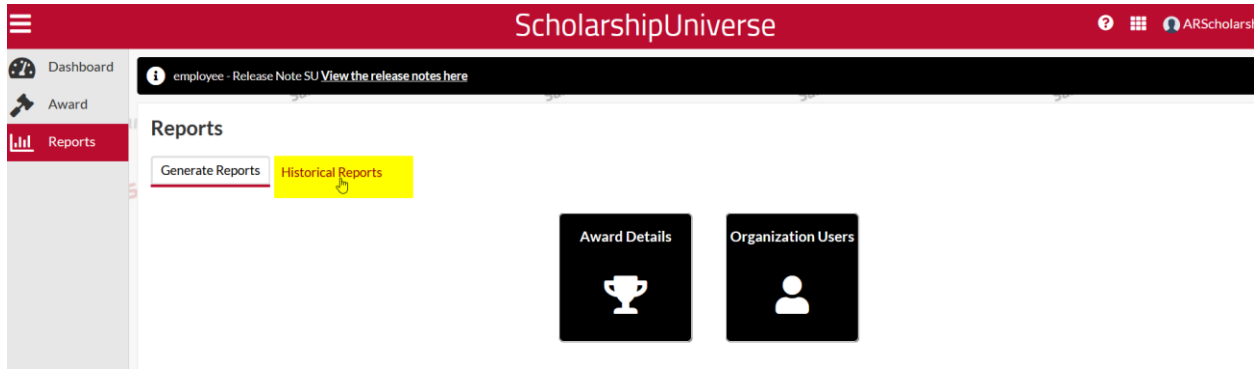
- If I want to see all users for Franklin College, I would select “Franklin College of Arts and Sciences” as the Organization, and leave the Department field blank.
- If I want to see all Scholarship Liaisons for the English department, I would select “Franklin College of Arts and Sciences” as the Organization, “English” as the Department, and “Scholarship Liaison” for the Role.
- If I know that a given individual has access to the English department, but I’m not sure which user role they are in, I would select “Franklin College of Arts and Sciences” as the Organization, “English” as the Department, and enter the individual’s name under Specific Users. Keep in mind that the individual you know as “Mandy” may be in the system by their full name of “Amanda.” Someone who typically goes by their middle name will likely be in the system by their first name. Someone who has recently changed their last name due to marriage or divorce may be in the system by a previous last name.

After you select “**Submit**,” a text box will appear letting you know that your request has been submitted, and reminding you that reports can take up to 30 minutes to arrive by email. In our experience, reports can arrive within seconds when the SU servers are not busy, but they can also take multiple hours to arrive when the system is under heavy use (which is most common over the summer and in December-January).

Click “OK” to clear the message.



If you are needing to access the information more quickly, try clicking on “**Historical Reports**” from the main Reports menu. Previously requested reports are listed/stored here, and your report may appear here before you receive the email.



Once your report appears on this list, click on the **“Download”** option on the right. You may need to refresh this screen a couple times before the report appears.

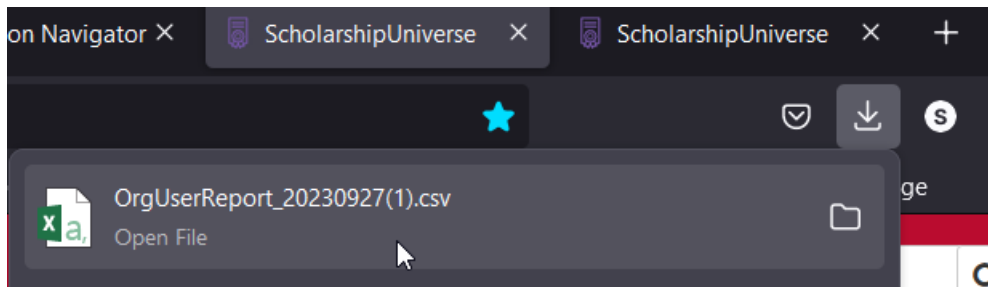
### Reports

Generate Reports Historical Reports

The following reports have been previously requested or automatically generated and are available to View/Download.

Report Title	Created On	Generated By	Download
OrgUserReport_20230927	09/27/2023 01:23 PM	Shelby Jarrett	

Your browser should display a pop-up showing where you can download the file you just requested. This process/view may be different between browsers. These screenshots were captured using Firefox.



Alternatively, you can wait for the report to be emailed to you. The email will look like the below. Click on the hyperlinked **“here”** or paste the provided URL into your browser to download the file.

Reply Reply All Forward

Wed 9/27/2023 2:26 PM



UGA - Scholarship Universe <osfa3@uga.edu>

Export Data from ScholarshipUniverse

To Shelby Frances Jarrett

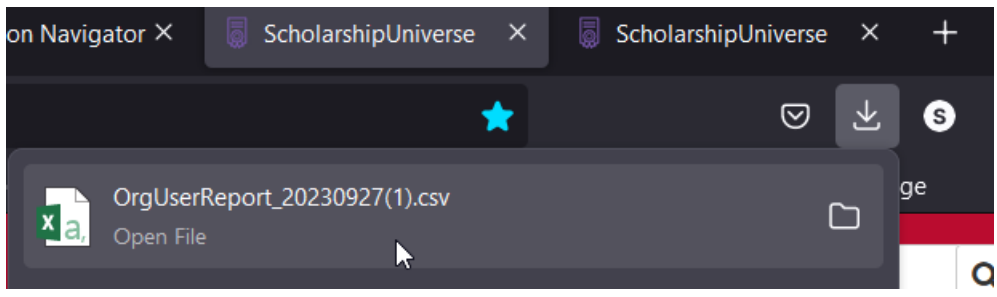
Hi Shelby Jarrett,

The ticket export you had requested for OrgUserReport\_20230927.csv is complete. You can download the file from [here](#). If the link does not work, copy and paste the URL below in your browser's address bar:

<https://clurl.co/CE3339CFD9C89FB1>

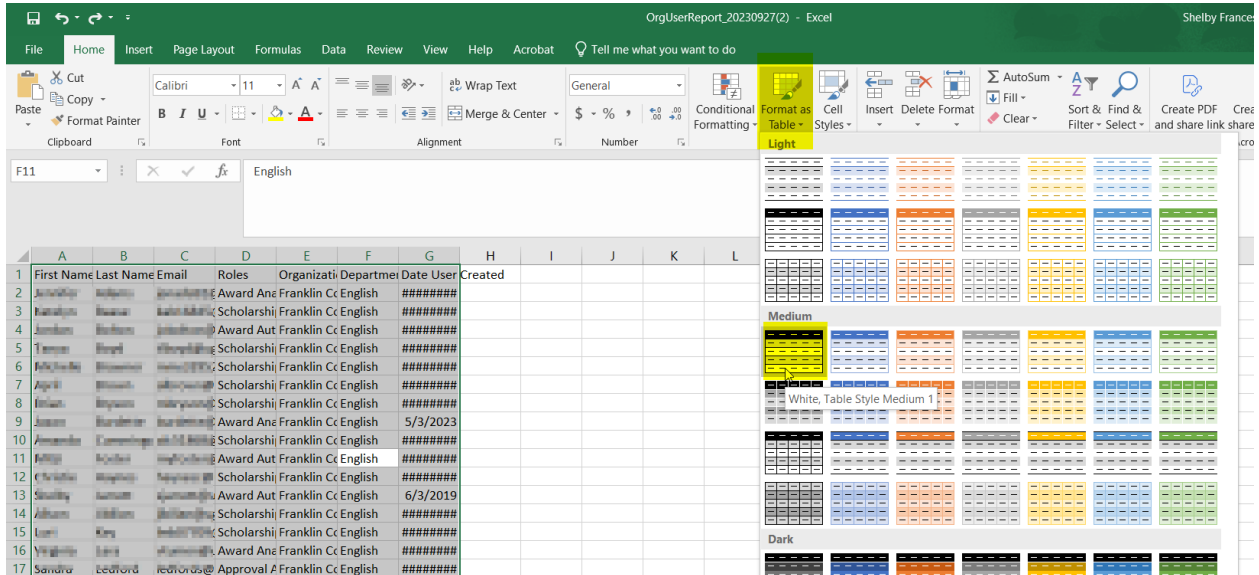
Please note that the links will expire after 14 days.

If you wish to unsubscribe from this type of communication, [Unsubscribe Here](#).

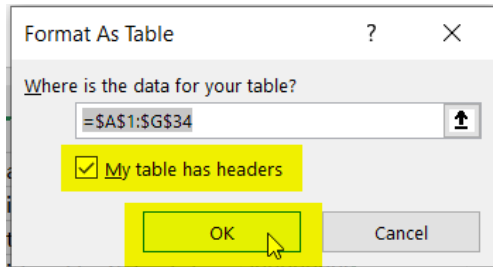


### Viewing/Editing the Report in Excel

The report will open as a CSV file in Excel. We recommend selecting all data (CTRL + A) and then choosing "Format as Table" to be able to organize and filter the data. You can use whichever table style you prefer.



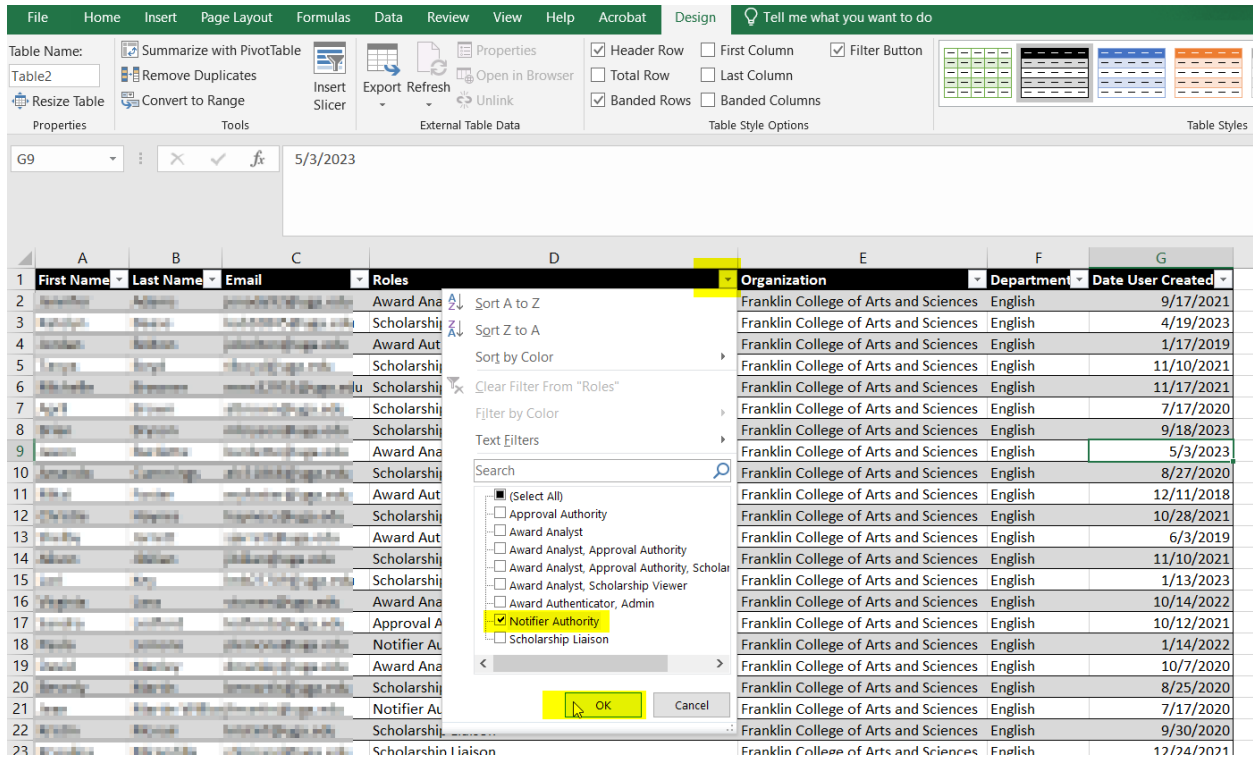
The below menu box will appear. Leave “My table has headers” checked and select OK.



Your report will now look something like this. You may need to adjust column widths as desired.

First Name	Last Name	Email	Roles	Organization	Department	Date User Created
Brandon	Waters	bwaters@franklin.edu	Award Analyst, Approval Authority, Scholarship Viewer	Franklin College of Arts and Sciences	English	9/17/2021
Karlene	Boyer	kboyer@franklin.edu	Scholarship Liaison	Franklin College of Arts and Sciences	English	4/19/2023
Brandon	Boyer	bboyer@franklin.edu	Award Authenticator, Admin	Franklin College of Arts and Sciences	English	1/17/2019
Tara	Boyd	tboyd@franklin.edu	Scholarship Liaison	Franklin College of Arts and Sciences	English	11/10/2021
Michelle	Brownell	mbrownell@franklin.edu	Scholarship Liaison	Franklin College of Arts and Sciences	English	11/17/2021
Lee	Brown	lbrown@franklin.edu	Scholarship Liaison	Franklin College of Arts and Sciences	English	7/17/2020
Jesse	Brown	jbrown@franklin.edu	Scholarship Liaison	Franklin College of Arts and Sciences	English	9/18/2023
Jason	Brayton	jbrayton@franklin.edu	Award Analyst, Scholarship Viewer	Franklin College of Arts and Sciences	English	5/3/2023
Michelle	Conneridge	mconneridge@franklin.edu	Scholarship Liaison	Franklin College of Arts and Sciences	English	8/27/2020
Matthew	Costello	mcostello@franklin.edu	Award Authenticator, Admin	Franklin College of Arts and Sciences	English	12/11/2018
Elizabeth	Magness	emagness@franklin.edu	Scholarship Liaison	Franklin College of Arts and Sciences	English	10/28/2021
Jeremy	Corbett	jcorbett@franklin.edu	Award Authenticator, Admin	Franklin College of Arts and Sciences	English	6/3/2019
Andrew	Chaffin	achaffin@franklin.edu	Scholarship Liaison	Franklin College of Arts and Sciences	English	11/10/2021
Scott	Chapman	schapman@franklin.edu	Scholarship Liaison	Franklin College of Arts and Sciences	English	1/13/2023
Stephanie	Clark	sclark@franklin.edu	Award Analyst, Scholarship Viewer	Franklin College of Arts and Sciences	English	10/14/2022
Barbara	Clark	bclark@franklin.edu	Approval Authority	Franklin College of Arts and Sciences	English	10/12/2021
Paula	Conners	pconners@franklin.edu	Notifier Authority	Franklin College of Arts and Sciences	English	1/14/2022
David	Conroy	dconroy@franklin.edu	Award Analyst	Franklin College of Arts and Sciences	English	10/7/2020

Now that the data is formatted as a table, you can use the drop-down arrows on each column header to sort and filter. For example, I might only wish to see who is in the Notify Authority role, or I might wish to sort the “Last Name” column from A to Z.



**A few caveats:**

- Some individuals in your department may have requested additional permissions so that they can access additional reports for their recordkeeping. If you see that someone has a list of user roles such as “Approval Authority, Award Analyst, Scholarship Viewer,” that is likely what has occurred.
- There will be some individuals who are **NOT** members of your department who have access to your department in SU. These individuals are staff within the Office of Student Financial Aid, the UGA Foundation, and/or the Bursar’s Office. Please rest assured that these individuals will not be modifying your awards, but must have access to your records for accounting or system maintenance purposes. The full list of these individuals (as of September 2023) is below. Other than these individuals, you should only see the users for the department(s) to which you have access.
- After reviewing your report, you may discover that you need to add additional users, or remove users whose responsibilities have changed or no longer need access. Employee Access Forms, and Employee Revoke access forms, can be found at <https://osfa.uga.edu/su-deptschawarding/>.

First Name	Last Name	Department
Catherine	Bielec	Bursar
Janet	Bohannon	Bursar

Therese	Hodges	Bursar
Kimberly	Ingram	Bursar
Deidra	Jones	Bursar
Brandi	Jones	Bursar
Katherine	Moon	Bursar
Judy	Scott	Bursar
Elena	Williams	Bursar
Jordan	Bolton	OSFA
Mitzi	Foster	OSFA
Shelby	Jarrett	OSFA
Eric	Nitz	OSFA
Ashley	Thigpen	OSFA
Robert	Tucker	OSFA
Lori	Whitaker	OSFA
Jason	Burdette	UGAF
Virginia	Lara	UGAF
David	Manley	UGAF
Katherine	Norman	UGAF