SCHOLARLINK Administrator, and Manager Guide

This manual contains information on how to use SCHOLARLINK, the scholar information system that you can access from your web browser, as a SCHOLARSHIP ADMINISTRATOR or SCHOLAR MANAGER.

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Welcome to SCHOLARLINK

Welcome to the SCHOLARLINK Administrator and Manager Guide! As the backbone of the Gado and Jess Jalandoni Scholarship Project, your role in guiding scholars through their educational journey is crucial. This guide is crafted to empower you with the tools and knowledge to efficiently manage scholar data, oversee submission processes, and maintain seamless communication. From setting up scholar accounts to generating insightful reports, you'll find detailed instructions to navigate SCHOLARLINK's comprehensive features. Embrace the journey of simplifying scholarship management, enhancing productivity, and making a significant impact on scholars' success. Let's get started!

Scholarlink, developed by See Solutions, is a streamlined system for managing scholar data effortlessly. It allows scholars to submit their information and documents easily, while the GJJSP Team can efficiently manage this data. With features like SMS and email reminders from Scholar Managers, Scholarlink ensures the GJJSP maintains accurate and up-to-date records, simplifying communication and data handling.

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User Management

User Classes and description:

User Classes	Descriptions
Scholarship Administrator	This user is the one responsible in setting up the scholarship information in the system such as the Scholarship Partners, and Scholarship Categories. They are also the ones managing all the user accounts.
Scholar Manager	These are both the GJJSP Secretariat and Assistant Secretariat Responsible for initiating and overseeing the scholar information management processes. This user class oversees notifying scholars and validating submitted information. They can only manage user accounts of the scholars.
Scholar	The Gado and Jess Jalandoni Scholarship Project has awarded scholarships to these users. The scholars are classified as scholar status: New, Renewing, Graduating, and Alumni. It is their responsibility to submit the required information and documents according to their scholar status when the Scholar Manager requests it.

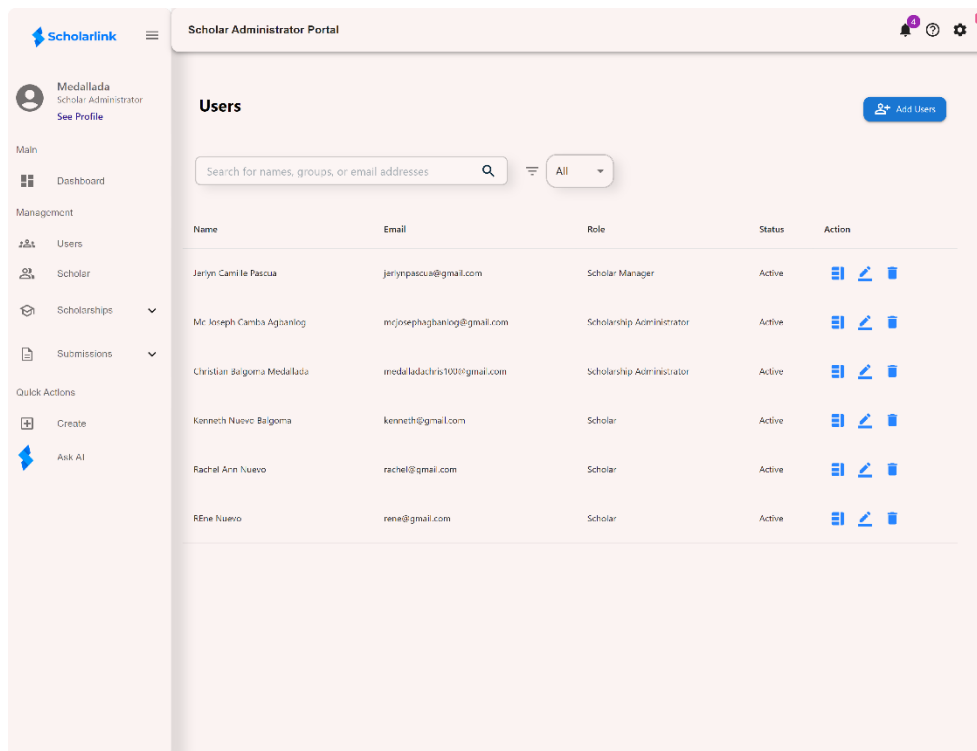The following pages contain information about managing accounts as an administrator or manager:

- Creating User Accounts
- Managing User Profiles
- Exporting Scholar Information

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# Creating User Accounts

To create a user account:

1. Log in as a user with the **Scholarship Administrator** role.
2. Navigate to the **Users** tab in the **Management** section.

3. Click the **Add User** button to open the 'Add New User' dialog box.
4. Enter the **First Name, Middle Name (Optional), Last Name, Email address, and Role.**
5. Click **Add** button and the newly added user will receive an email containing:
   - Their login credentials (email, and temporary password).
   - The link to SCHOLARLINK login page.

To create a scholar account:

1. Log in as a user with the **Scholarship Administrator** or **Scholar Manager** role.
2. Navigate to the **Scholars** tab in the **Management** section.
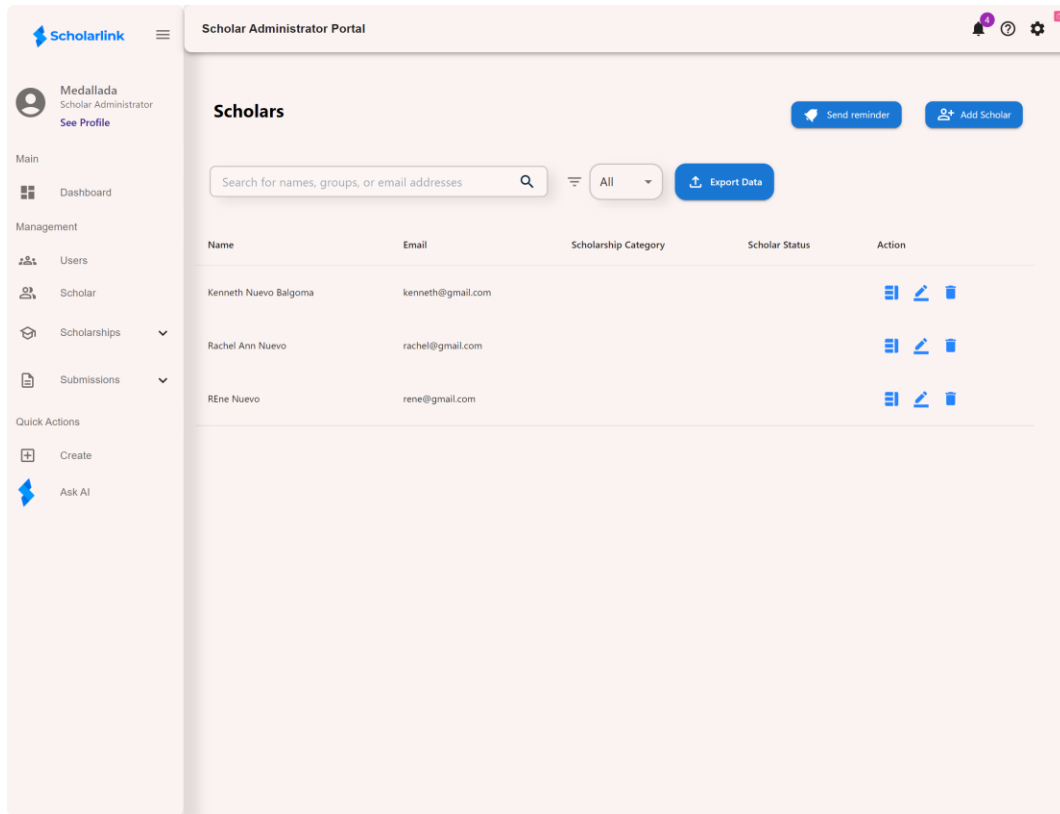
3. Click the **Add Scholar Button** to open the 'Add New Scholar' dialog box.
4. Enter **First Name, Middle Name (Optional), Last Name, Email address, Scholarship Category, Scholarship Partner, Academic Cycle (Optional), Program Duration (Optional), and Scholar Status.**
5. Click **Add** button and the newly added scholar will receive an email containing:
   a. Their login credentials (email, and temporary password).
   b. The link to SCHOLARLINK login page.

By following these steps, you may quickly view and change user profiles, ensuring that user information is correct and up to date throughout the system.

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Managing User Profiles

To view a user's profile:

1. Log in as a user with the **Scholarship Administrator** role.
2. Navigate to the **Users** tab.
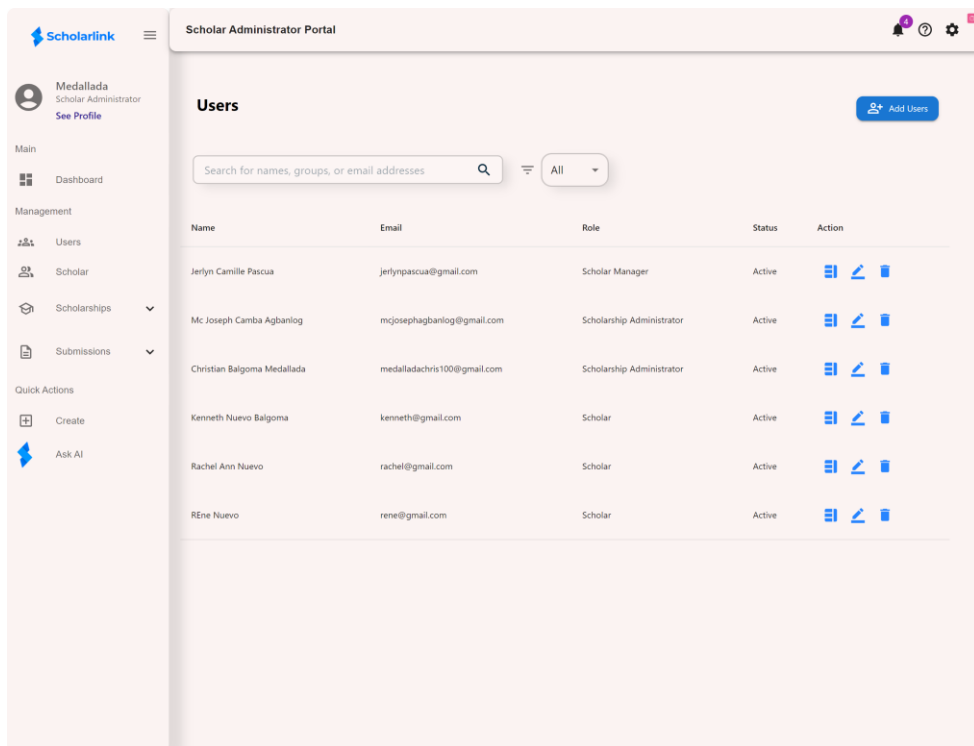
3. Click the to be redirected to the selected user's profile.

To edit user's profile:

1. Once redirected to the user's profile, click the **Edit profile** button to open the 'Edit this <user>'s profile' dialog box.
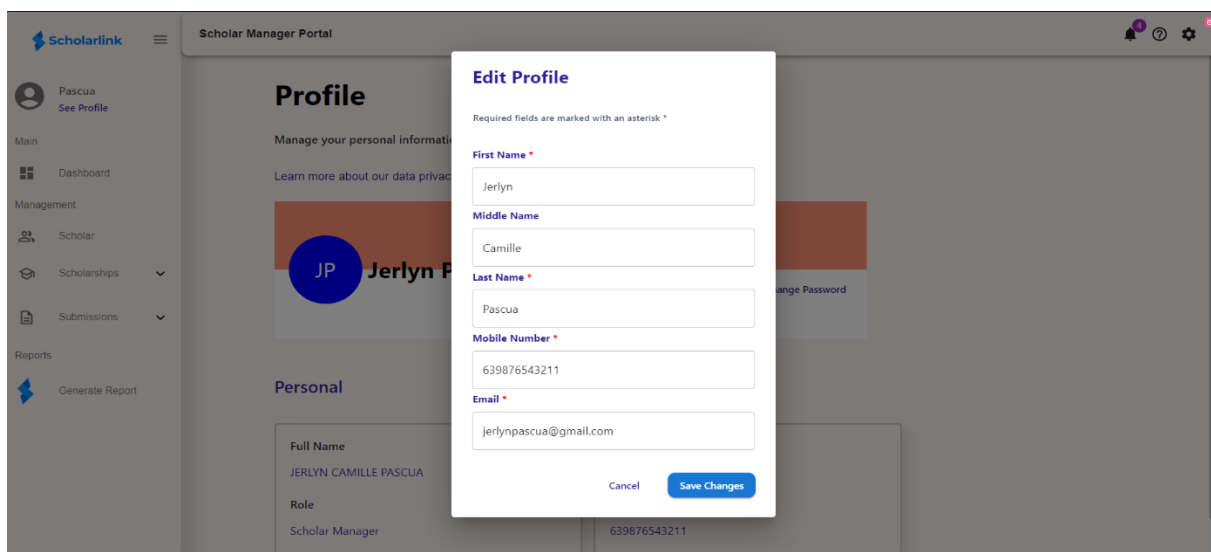
2. Edit preferred information and click **Save** button.
3. When routed to the user's profile, click the Edit profile button.
4. Edit your selected details and click the save button.
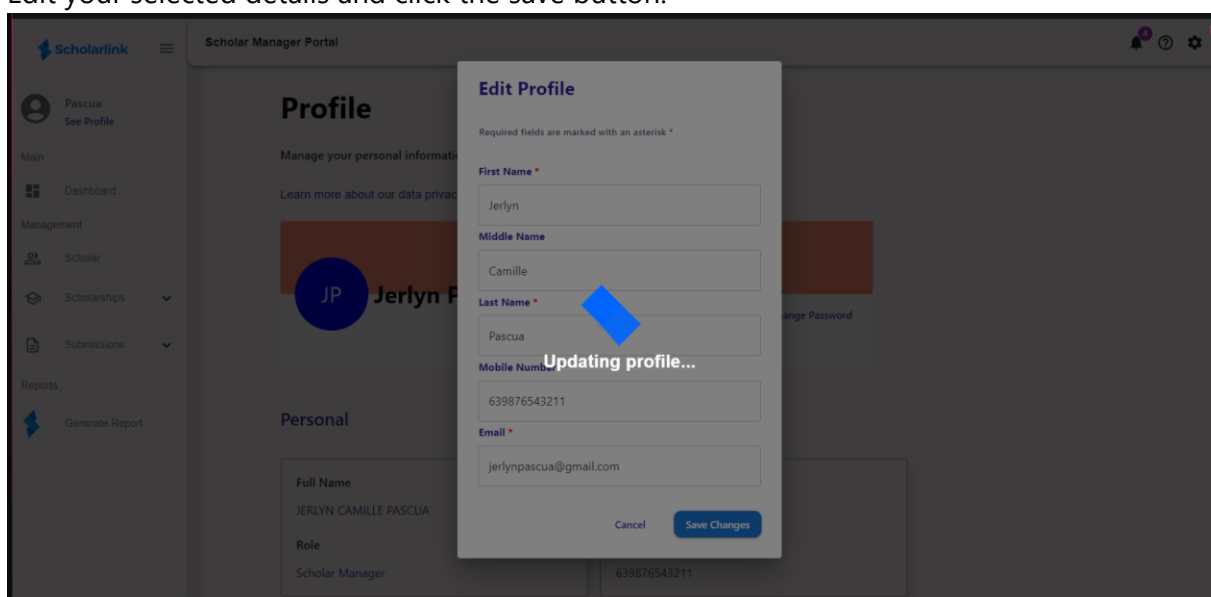
5. The selected user will receive an email containing their profile edit history.

By following these steps, you may quickly view and change user profiles, ensuring that user information is correct and up to date throughout the system.

ⓘ **Please Note:** If you are a **Scholar Manager**, you can only manage scholar accounts and their profiles.

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Exporting Scholar Information

To export scholar information:

1. Log in as a user with the **Scholarship Administrator** or **Scholar Manager** role.
- Ensure that you have the necessary user credentials, including administrative rights or Scholar Manager permissions.
2. Navigate to the **Scholars** tab.
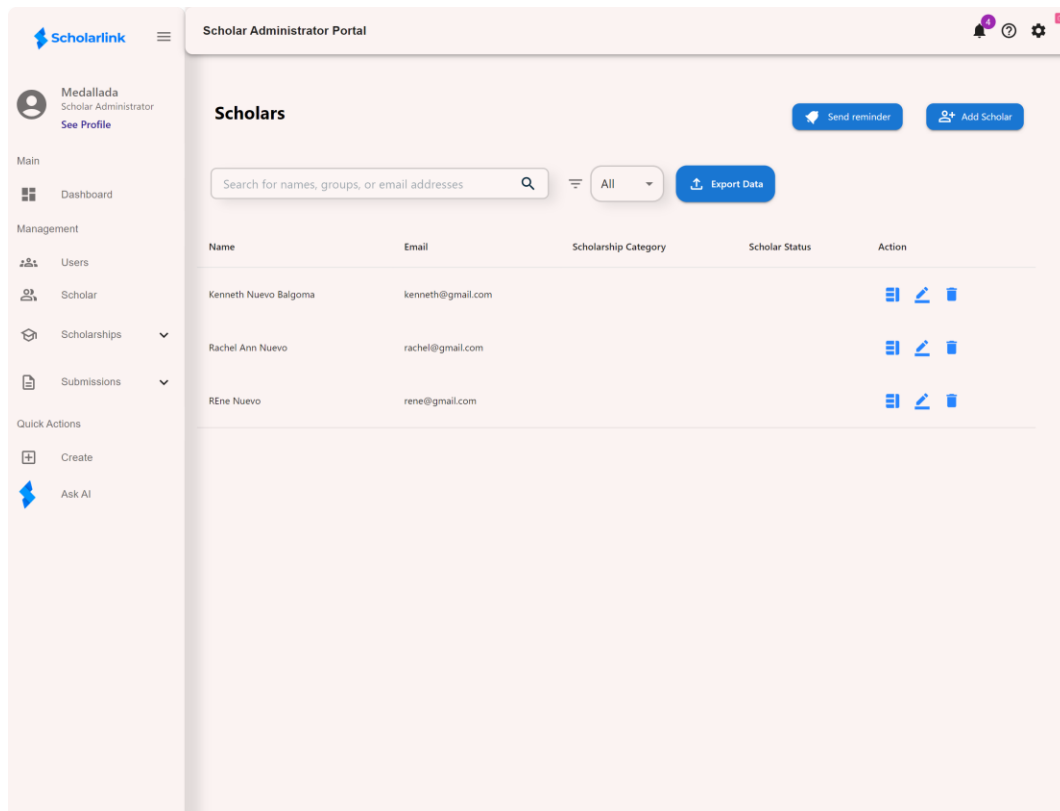
3. Click **Export Data** button to open the 'Select export data parameters' dialog box.
4. Select preferred **School Year**, and **Term** then click **Export** button to download the scholar data in *Microsoft Excel* (.xlsx).
   - In the dialog box, select the desired parameters, such as School Year and Term, from the list of possibilities.
   - After selecting the parameters, click the "Export" button.
   - The system will generate and download the scholar data in Microsoft Excel (.xlsx) format, which includes the provided parameters.

By following these steps, you can efficiently export scholar information from the system.

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Dashboard Navigation

1. Accessing the Dashboard
2. Upon logging in, you will be directly led to your personalized dashboard.
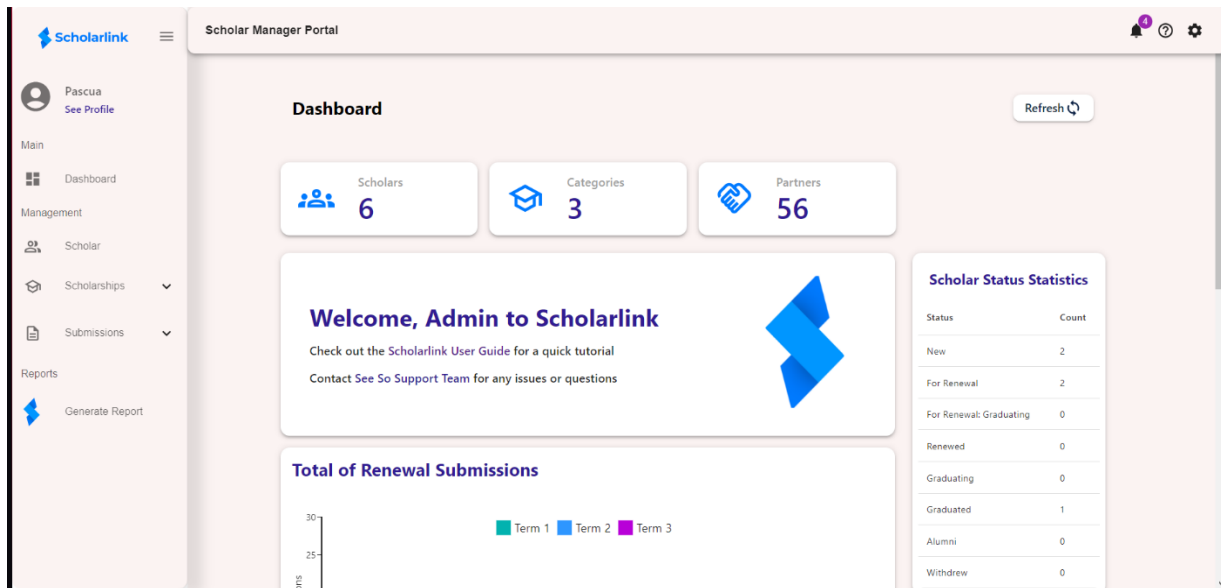
Profile Management

To view your own profile:

1. Log in using your **valid** credentials.
2. Click the **See Profile** button in the navigation bar which will redirect you to your profile.

To edit your own profile:

1. In your profile page, click the **Edit profile** button to open the 'Edit Profile' dialog box.
2. Edit your preferred information, then click **Save**.

To change your password:

1. Navigate to your **Profile**.
2. Click the **Change password** button, then enter your current password and new password.
3. Confirm the new password and click **Change password**, this will send a One-Time password (OTP) to your email.
4. From the 'Enter OTP' dialog box and enter the OTP from the received email.
5. Click **Confirm** to successfully change your password.

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Reviewing Submissions

The following pages contain information on how to review scholar submissions:

- [Accessing Scholar Submission](#)
- [The Approval Process](#)

Accessing Scholar Submissions

To access scholar submissions:

1. Log in as a user with the **Scholarship Administrator** or **Scholar Manager** role.
2. Navigate to **Submissions** tab under the **Management** section.
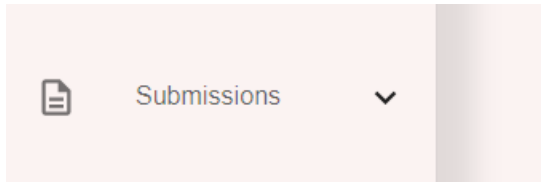
3. Explore the Submissions list to review and manage scholar submissions efficiently.

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The Approval Process

As a Scholarship Administrator or Scholar Manager, you have an important role in the approval process. Here's how to navigate it successfully:

1. Navigate to the approval dashboard or the section dedicated to examining submissions.

2. View the list of submissions that are awaiting approval.

3. Each submission should be carefully reviewed to ensure that all standards are met, and the material is correct.

4. Approve: If the submission fits all criteria and is correct, approve it to move on to the next level.

5. Reject: If the submission is incomplete, inaccurate, or does not meet the requirements, reject it and provide appropriate comments to the applicant.

6. Request More Information: If additional information is required, request it from the applicant before proceeding with the approval.

7. Update the submission status in the system (e.g., approved, rejected, pending additional information)

Following these procedures will let you efficiently manage the approval process, ensuring only qualifying applications are approved while providing applicants with the appropriate comments.

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Reports and Analytics

The following pages contain information on how to generate reports and view analytical insights:

- [Generating Reports](#)
- [Dashboard Analytics](#)

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Generating Reports

To generate reports:

1. Log in as a user with the **Scholarship Administrator** or **Scholar Manager** role.
2. Click **Generate Report** from the **Quick Actions** section to open the 'Select report parameters' dialog box.

3. Select preferred **School Year** and **Document type** (.pdf, or .docx) then click **Generate** button to download the scholar summary report in selected document type.

By following these steps, you can simply create scholar summary reports according on your preferences.

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Dashboard Analytics

Dashboard analytics provides vital information on numerous areas of the scholarship program. Here's how Scholar Administrators and Managers can use dashboard analytics:

1. Log in to your account using the Scholar Administrator or Manager credentials.
2. Navigate to the Analytics or Reports area of the dashboard.
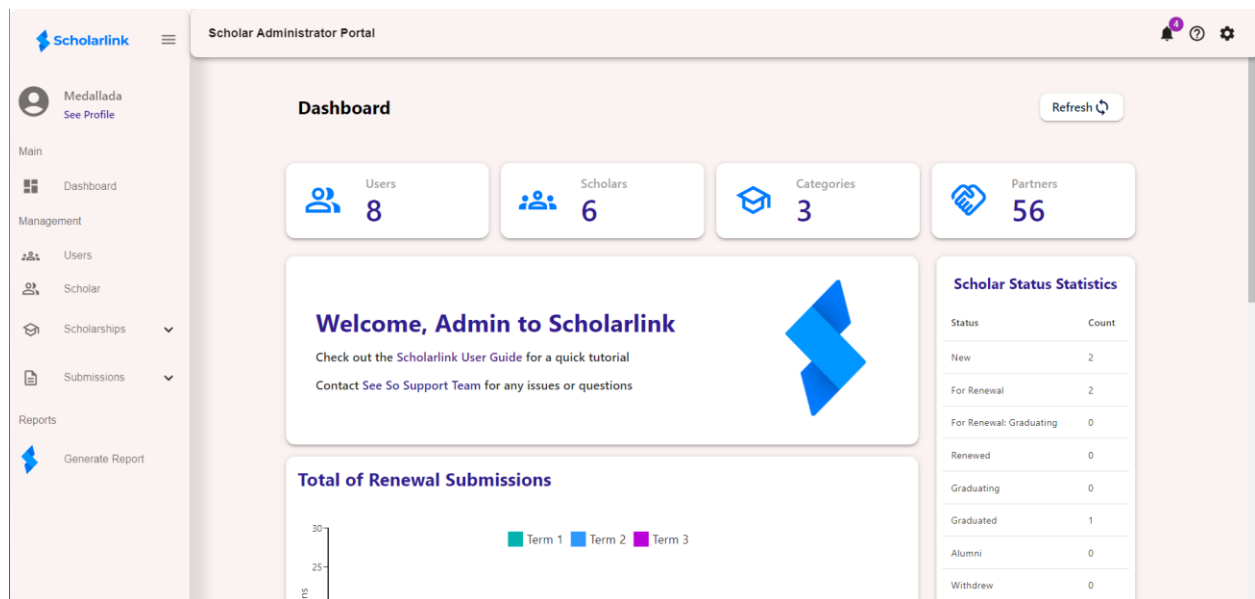
Scholar Administrators and Managers can use dashboard analytics to get useful insights that support informed decision-making and contribute to the scholarship program's success.

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Scholarship Information Management

The following pages contain information about managing scholarship information:

- [Managing Scholarship Categories](#)
- [Managing Scholarship Partners](#)
- [Configuring the Current School Year and Term](#)

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Managing Scholarship Categories

Use the following procedures to efficiently manage scholarship categories:

1. Navigate to the area dedicated to managing scholarship categories.
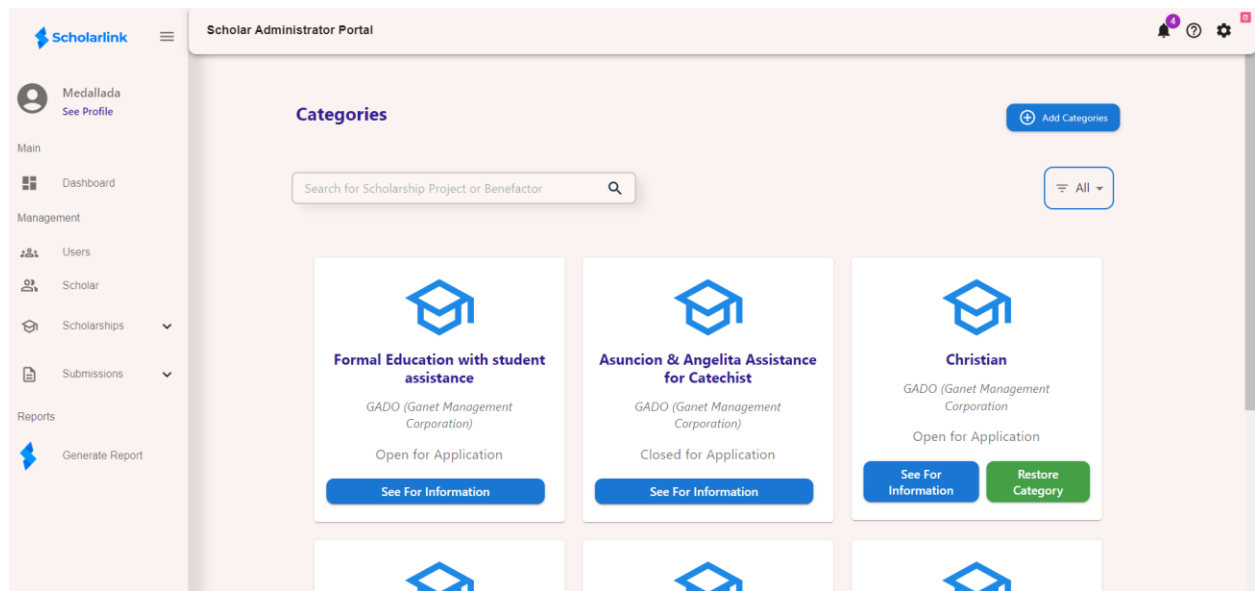
2. Examine the list of existing scholarship categories.

3. Take note of their names, descriptions, and other relevant criteria.

4. To update the category list, save your changes after adding or modifying them.

By following these procedures, you can efficiently manage scholarship categories while ensuring they are in line with program objectives and standards.

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Managing Scholarship Partners

To efficiently manage your scholarship partnerships, follow these steps:

1. Navigate to the section dedicated to managing scholarship partners.

2. To add a new partner, look for the Create a New Partner Entry option.
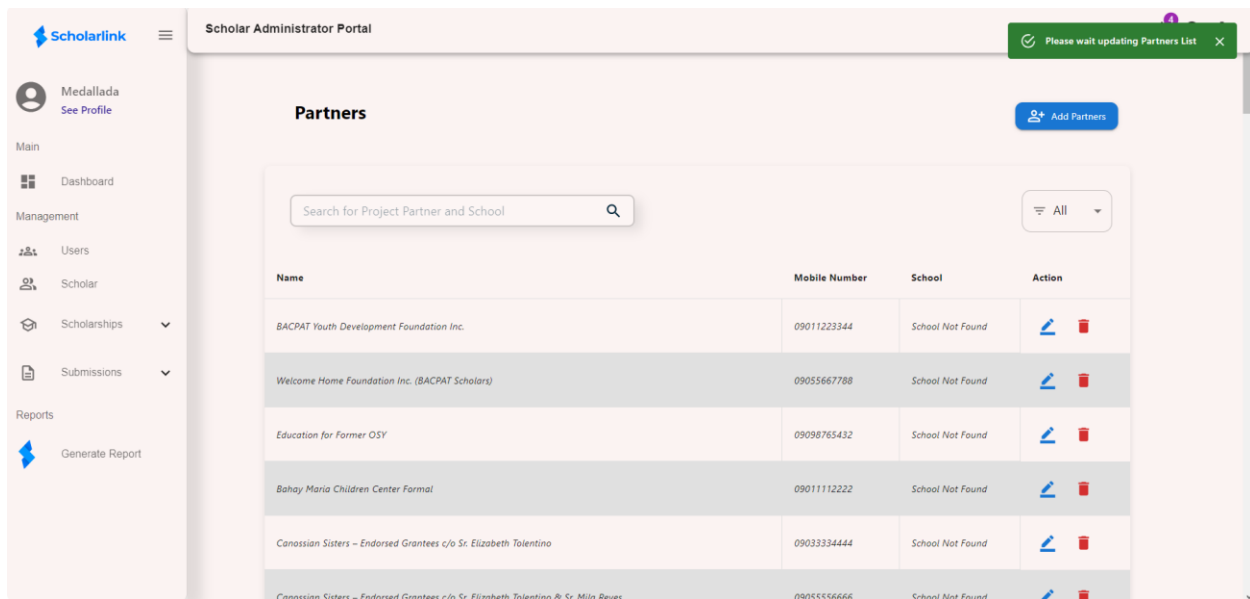
3. Enter the partner's name, contact information, and relationship details.

4. If adjustments are required for current partners, find the option to amend partner information.

5. Make updates as needed, ensuring that all information is correct and up to date.

6. If a partnership is no longer relevant, look for the option to eliminate partners.

7. When eliminating partners, exercise caution and make sure it's essential.

8. To update the partner list, save your changes after adding or modifying them.

Follow these steps to efficiently manage your scholarship partnerships, develop positive relationships, and maximize chances for your scholarship program.

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Configuring the Current School Year and Term

Set up the current school year and term with the following steps:

1. Go to the Configuration or Settings area.

2. Look for choices to configure the current school year and term.

3. Select the current school year from the available options.

4. Make sure it corresponds to the academic calendar used by your university.

5. Choose the current phrase from the list presented. This could be a semester, quarter, or another academic term.

6. After selecting the current school year and term, save your changes to update the system settings.

7. Double-check the chosen school year and term to guarantee accuracy. Confirm that the settings correspond to the current academic period.

Following these procedures will let you configure the current school year and term in the system, ensuring it complies with academic schedules and requirements.

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Communications

The following pages contain information about communication within the system as an administrator or manager:
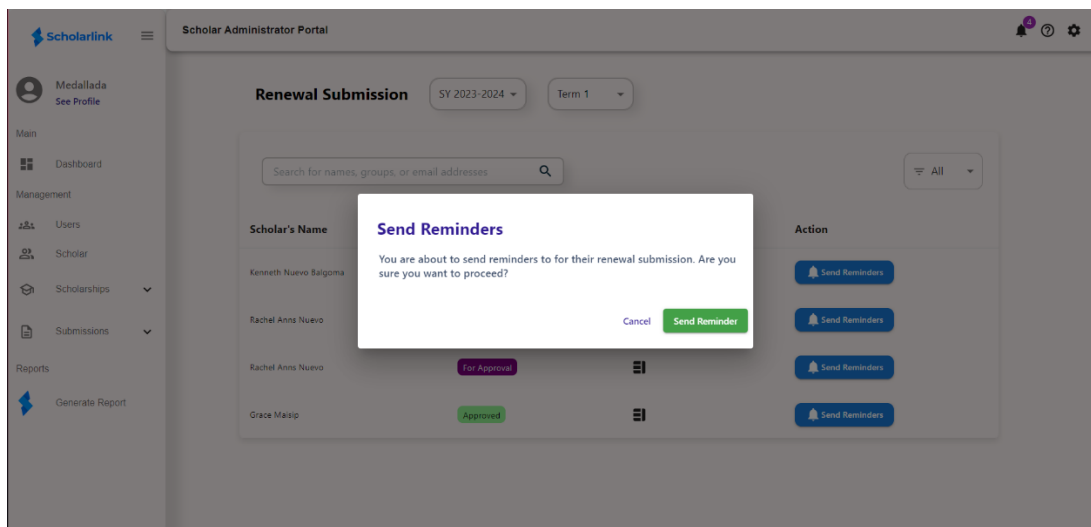
- [Sending Reminders](#)
- [Managing Reminders](#)

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Sending Reminders

Sending reminders is critical for keeping people informed and on task. Here's how you can send reminders effectively:

1. Navigate to the reminder or scheduling section.

2. Choose who should receive the reminders.

3. Determine how frequently reminders should be sent out.

4. Set the schedule for sending out reminders.

5. Check the reminder settings and messages for accuracy.

By following these steps, you can ensure that reminders are delivered efficiently, allowing users to stay informed and organized.

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Managing Reminders

To manage reminders:

1. Navigate to the reminder management section of the system.

2. Examine the list of reminders that are currently set up in the system.

3. Examine the list of reminders that are currently configured in the system.

4. If current reminders need to be updated, locate the edit option.

5. If any reminders are no longer needed, find the option to erase them.

6. When eliminating reminders, use caution and make sure they are no longer needed.

By following these steps, you can effectively manage reminders and ensure that users receive timely and relevant messages.

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