

Graduate Research (HDR) Scholarship Appointment

HDR Administrator (RA) Quick Guide

A. Initiating and submitting a scholarship appointment form

1. Log onto Salesforce <https://utsadmin.lightning.force.com/>
2. Start the scholarship appointment form (top right-hand corner).
3. Select the student.
4. Select the course.
5. Select the scholarship load.
6. Enter the scholarship details.
7. Enter the scholarship funding details by selecting the number of funding sources.
8. Enter the scholarship funding details for all funding sources.
9. Attach the required supporting documents.
10. After submitting the form, you can review the details and send it to the RAO for approval.

B. Changing the details of a scholarship form

1. Change the load category on the scholarship overview page and “Save” the changes.
2. Add or change the RAO on the scholarship overview page and “Save” the changes.
3. Change the scholarship details by clicking “Edit” on the “Scholarships Details” and “Save” the changes.
4. Change the funding details by clicking “Edit” on the relevant “Funding Details” and “Save” the changes.
5. Attach additional documents by clicking “Upload Files” and attach the document.

C. Creating a new PDF of the form

1. Click “Create PDF” on the top-right corner to generate a PDF with the most up-to-date information from the form.

D. Sending the scholarship form for RAO’s approval

1. Click “Assign to RAO” on the top-left box, enter a message for the RAO and click “Next” to send the form to the RAO.

E. Responding to RAO’s/GRS’s comments

1. Change the scholarship details per B above and reassign the scholarship request to RAO.

F. Withdrawing/cancelling a scholarship request

1. Click "Close" on the top workflow status, then click "Select Closed Status".
2. Select "Cancelled", then "Save".

G. Viewing all scholarship requests through list views/reports

1. To view list views:
 - a. Click "Requests" on the top menu and search for "GRS Scholarship Requests – faculty x", where "faculty x" is your faculty name.
 - b. Click the request number to see the details of the specific scholarship request
2. To view reports:
 - a. Click "Report" on the top menu and click the desired report.
 - b. Click the request number to see the details of the specific scholarship request.

