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FAN Letter Generation

Concept

The Financial Aid Notification communication is generated in several steps.

1. The students to whom the communication will be sent must have the letter assigned to them.
2. A process is run to select the students who will receive the communication, along with certain data for the letters such as which mailing address to use, etc.
3. A second process is run to extract the data into a CSV file.
4. Finally, the CSV file is downloaded to a local PC and merged with the FAN letter template to create and print (or e-mail) the actual letters. The merge process is external to the MaineStreet system.

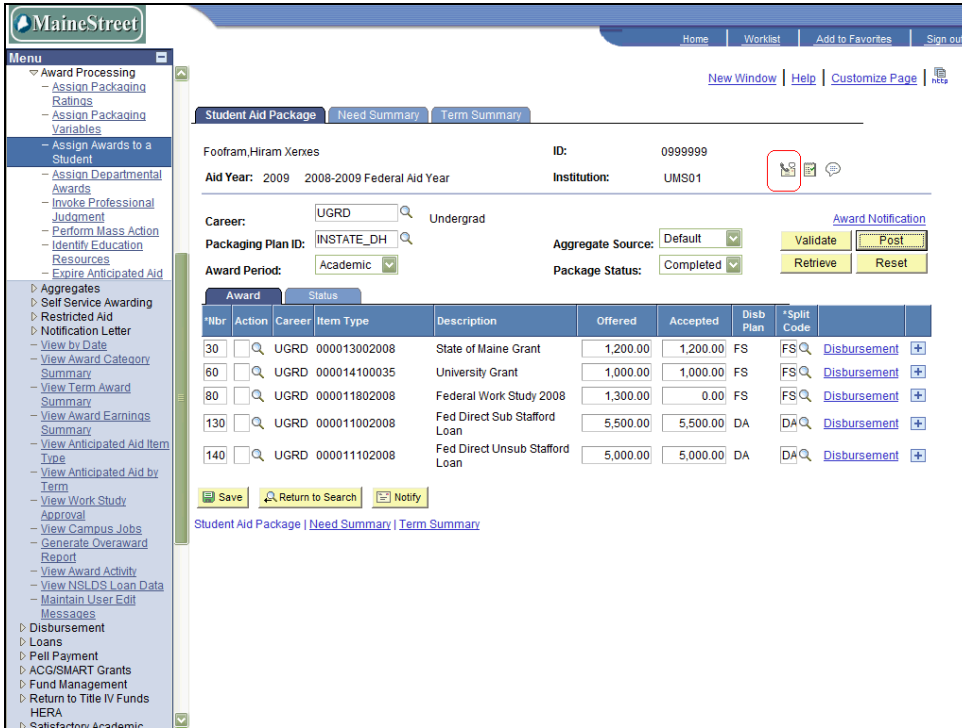
Procedure

Before the FAN letters can be generated, students must have the letters assigned to them. Once that is done, the student selection and data extraction processes can be run, the data file can be downloaded and the mail merge performed.

In the majority of cases, the FAN letter will be assigned to students using an automated process (please refer to the documentation on the FAN Assignment process). However, you can manually assign the FAN to a student.

In the first part of this topic we will see how to manually assign communications to students. In the second part, we will see how to perform the selection and extraction processes. For information on mail merge, please consult documentation on MS Word or an equivalent word processor.

Step	Action
1.	There are two ways to assign a communication: via the Communications icon present on many pages in the system, and via the Communications component. We will see both methods. Navigate to Assign Awards to a Student: Financial Aid > Awards > Award Processing > Assign Awards to a Student. Enter search criteria to identify the student. The Student Aid Package page is displayed.



Menu

- Award Processing
 - Assign Packaging Ratings
 - Assign Packaging Variables
 - Assign Awards to a Student
 - Assign Departmental Awards
 - Invoke Professional Judgment
 - Perform Mass Action
 - Identify Education Resources
 - Expire Anticipated Aid
- Aggregates
- Self Service Awarding
- Restricted Aid
- Notification Letter
 - View by Date
 - View Award Category Summary
 - View Term Award Summary
 - View Award Earnings Summary
 - View Anticipated Aid Item Type
 - View Anticipated Aid by Term
 - View Work Study Approval
 - View Campus Jobs
 - Generate Overaward Report
 - View Award Activity
 - View NSLDS Loan Data
 - Maintain User Edit Messages
- Disbursement
- Loans
- Pell Payment
- ACG/SMART Grants
- Fund Management
- Return to Title IV Funds
- HERA
- Satisfactory Academic

Student Aid Package | Need Summary | Term Summary

Footram, Hiram Xerxes ID: 0999999

Aid Year: 2009 2008-2009 Federal Aid Year Institution: UMS01

Career: UGRD Undergrad

Packaging Plan ID: INSTATE_DH

Award Period: Academic

Aggregate Source: Default

Package Status: Completed

Buttons: Validate, Post, Retrieve, Reset

#	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	Split Code	Disbursement
30		UGRD	000013002008	State of Maine Grant	1,200.00	1,200.00	FS	FS	Disbursement
60		UGRD	000014100035	University Grant	1,000.00	1,000.00	FS	FS	Disbursement
80		UGRD	000011802008	Federal Work Study 2008	1,300.00	0.00	FS	FS	Disbursement
130		UGRD	000011002008	Fed Direct Sub Stafford Loan	5,500.00	5,500.00	DA	DA	Disbursement
140		UGRD	000011102008	Fed Direct Unsub Stafford Loan	5,000.00	5,000.00	DA	DA	Disbursement

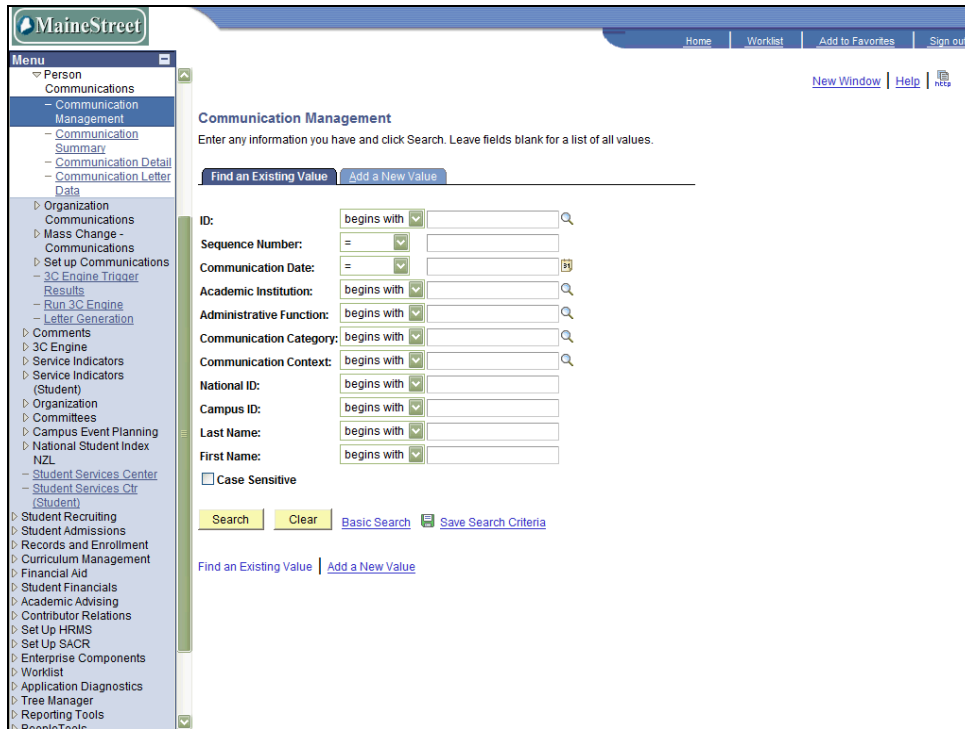
Buttons: Save, Return to Search, Notify

Student Aid Package | Need Summary | Term Summary

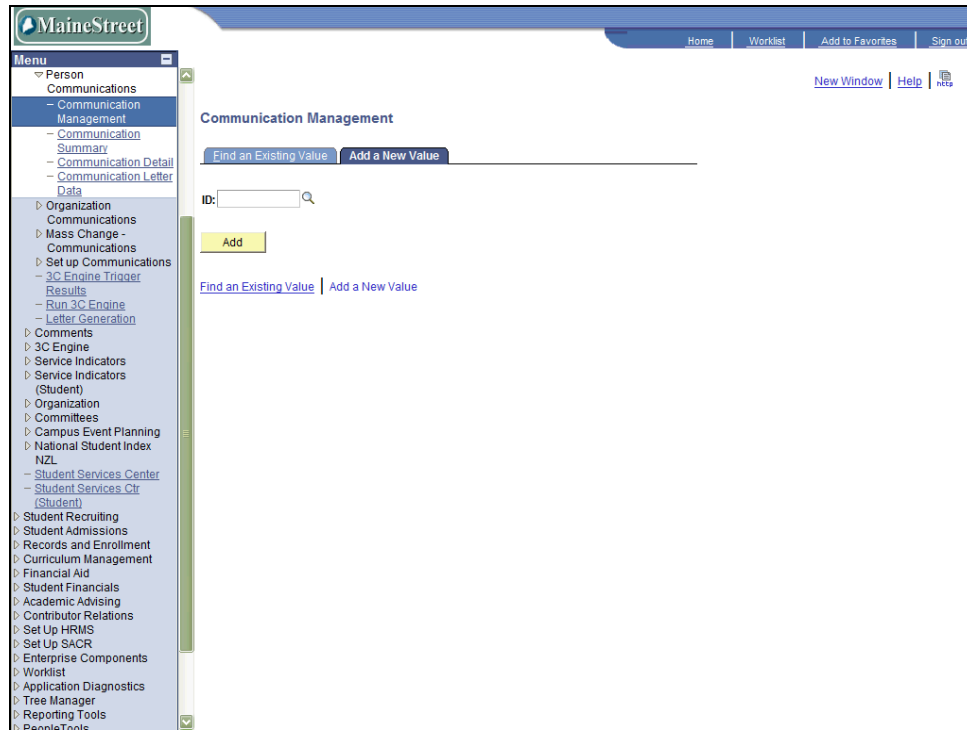
Step	Action
2.	<p>In the Assign Awards to a Student component, you can assign the FAN communication directly to a student via the Add a New Communication button.</p> <p>Clicking this button will open a new window displaying the Communications Management component for this student.</p> <p>An alternative route to Communications Management is via the menus, which we will see next.</p>
3.	<p>Starting from the "Home" menu, navigate: Campus Community > Communications > Person Communications > Communication Management.</p>

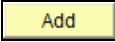
Process Document

Financial Aid: FAN Letter Generation-042408



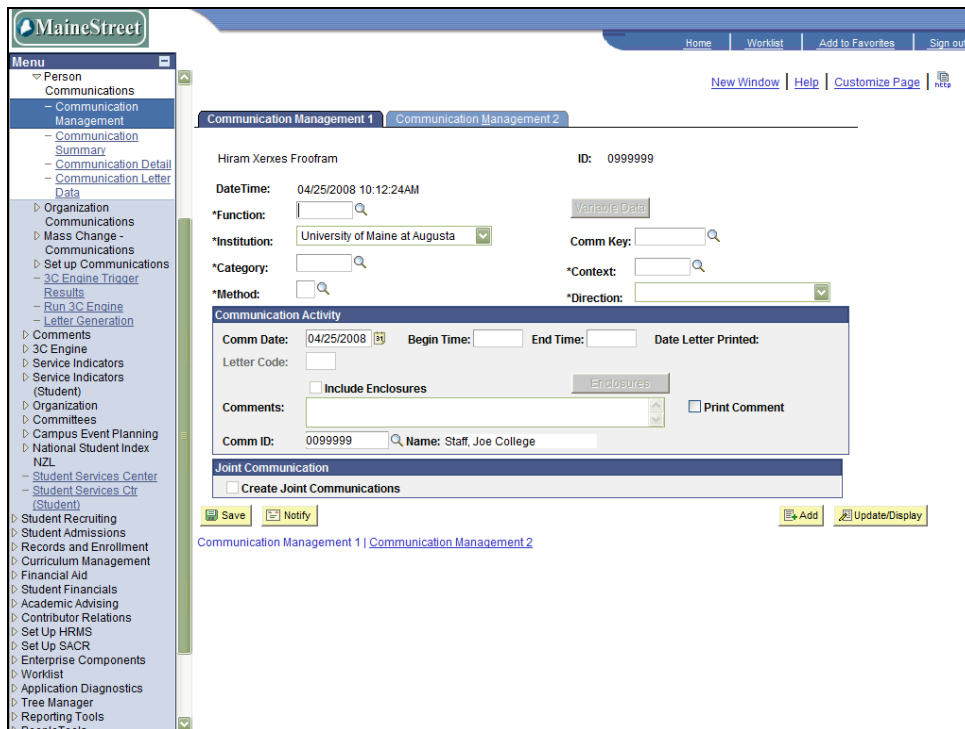
Step	Action
4.	Because you are adding the FAN communication to the student, click the Add a New Value tab. Add a New Value



Step	Action
5.	Enter the student's ID in the ID field.
6.	Click Add . 

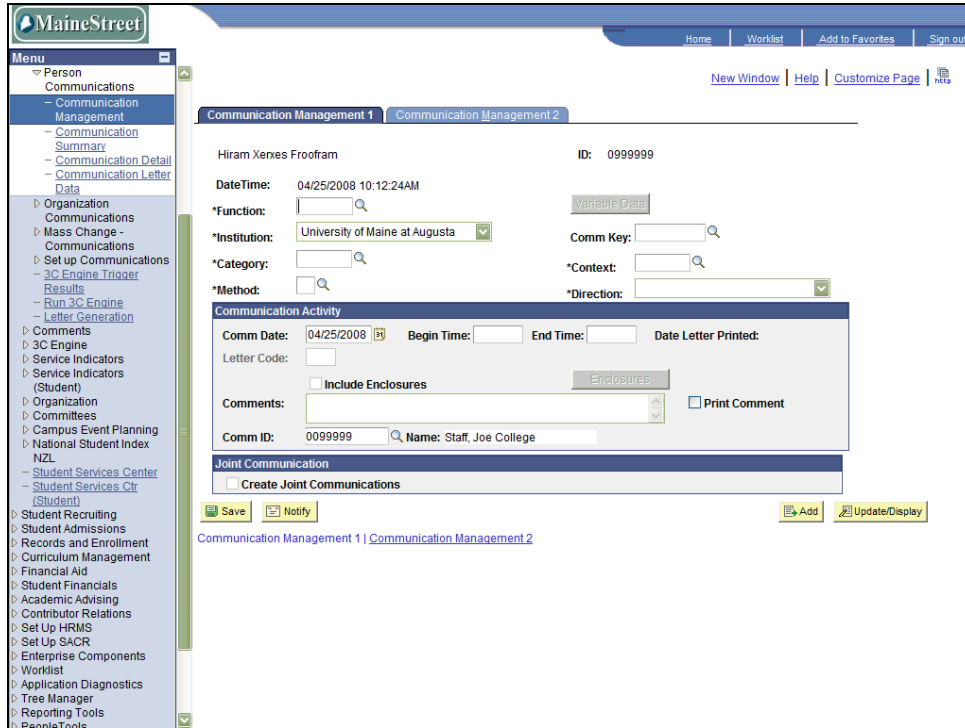
Process Document

Financial Aid: FAN Letter Generation-042408




The screenshot shows the 'MaineStreet' web application interface. On the left is a 'Menu' with categories like 'Person', 'Communications', 'Organization', and 'Comments'. The main area is titled 'Communication Management 1' and shows details for a communication to 'Hiram Xerxes Froofram' (ID: 0999999). Fields include 'Date Time' (04/25/2008 10:12:24AM), 'Function', 'Institution' (University of Maine at Augusta), 'Category', and 'Method'. There are also search boxes for 'Variable Data', 'Comm Key', 'Context', and 'Direction'. A 'Communication Activity' section shows 'Comm Date' (04/25/2008), 'Begin Time', 'End Time', and 'Date Letter Printed'. Below that is a 'Comments' field with an 'Include Enclosures' checkbox and a 'Print Comment' button. At the bottom, there are 'Save', 'Notify', 'Add', and 'Update/Display' buttons.

Step	Action
7.	You see the Communications Management 1 page where you can specify which communication to add to the student. This is the same page you see if you use the Add a New Communication button on the Assign Awards page.

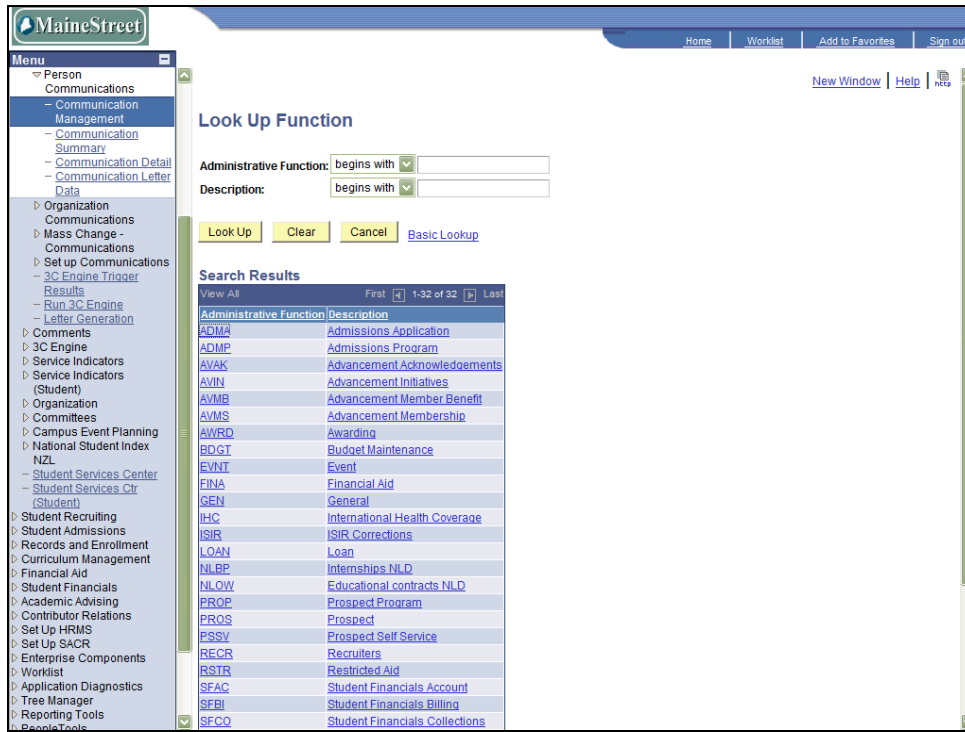


The screenshot shows the 'MaineStreet' application interface. On the left is a navigation menu with categories like Person, Communications, Organization, and Student Admissions. The main area displays a form for 'Communication Management 1' and 'Communication Management 2'. The form includes fields for Name (Hiram Xerxes Froofram), ID (0999999), Date Time (04/25/2008 10:12:24AM), Function (with a look-up button), Institution (University of Maine at Augusta), Comm Key, Category, Method, Context, and Direction. Below these are sections for 'Communication Activity' (with fields for Comm Date, Begin Time, End Time, Date Letter Printed, Letter Code, and a checkbox for 'Include Enclosures') and 'Joint Communication' (with a checkbox for 'Create Joint Communications'). At the bottom of the form are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'.

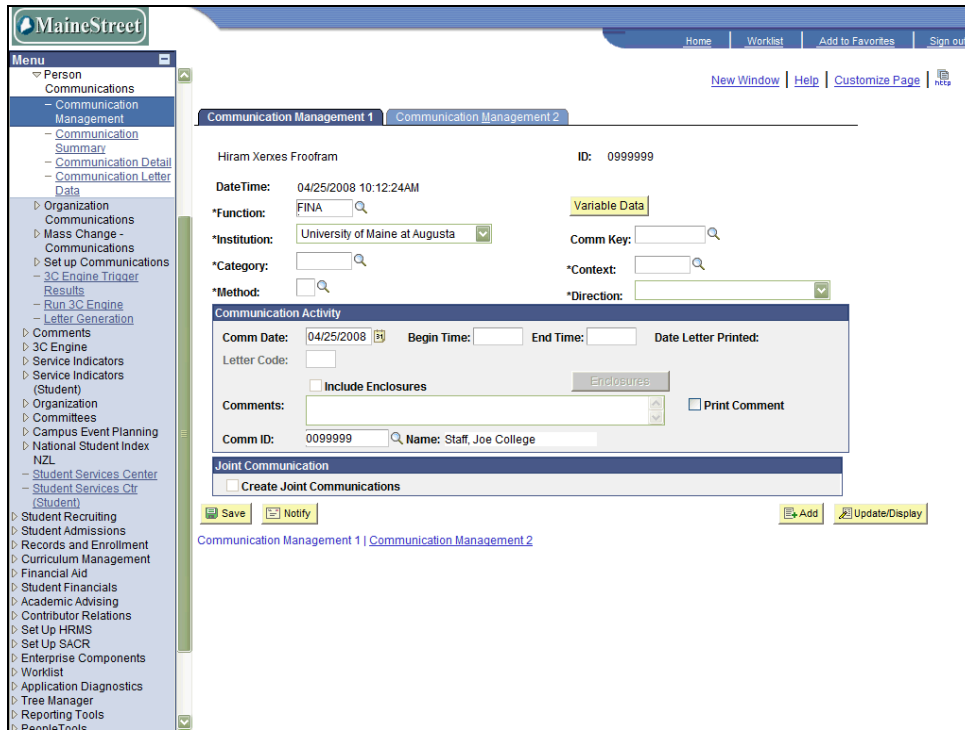
Step	Action
8.	Select the Administrative Function for this letter. Use the look up button to see your choices. 

Process Document

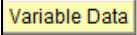
Financial Aid: FAN Letter Generation-042408



Step	Action
9.	The FAN letter has FINA administrative function. Select FINA in the list.

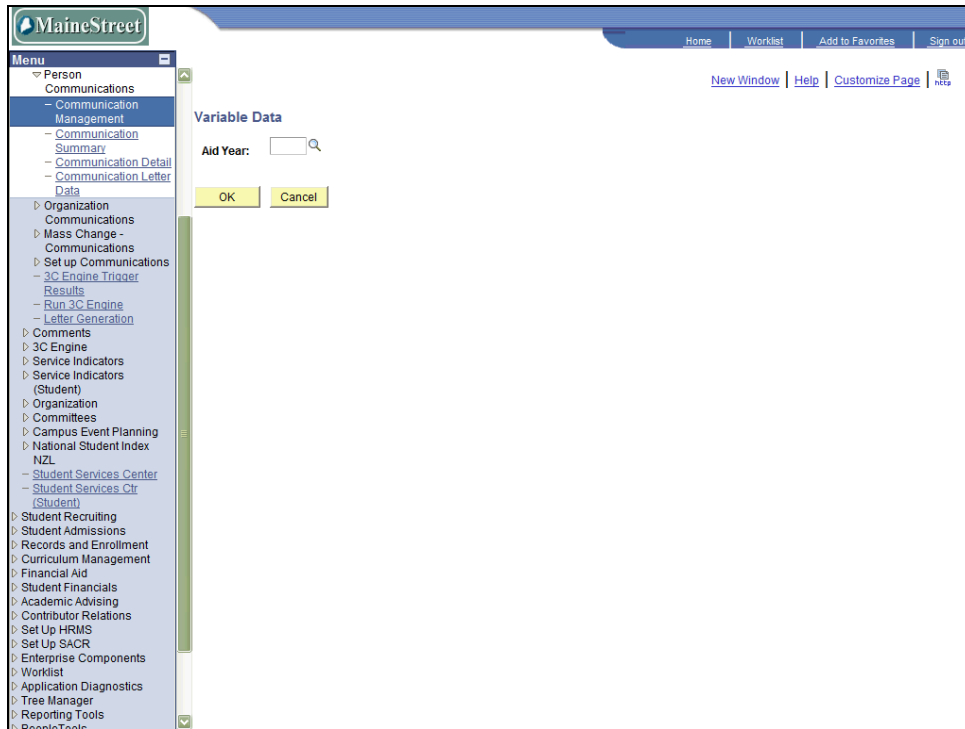


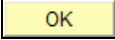
The screenshot shows the 'MaineStreet' application interface. On the left is a navigation menu with categories like Person, Communications, Organization, and Student Admissions. The main window displays the 'Communication Management' screen for a student named Hiram Xerxes Frooman (ID: 0999999). The 'Date Time' is 04/25/2008 10:12:24AM. The 'Function' is 'FINA', and the 'Institution' is 'University of Maine at Augusta'. A yellow 'Variable Data' button is highlighted. Below this are fields for 'Comm Key', 'Category', 'Method', 'Context', and 'Direction'. A 'Communication Activity' section shows 'Comm Date' as 04/25/2008 and 'Comm ID' as 0099999. At the bottom, there are 'Save', 'Notify', 'Add', and 'Update/Display' buttons.

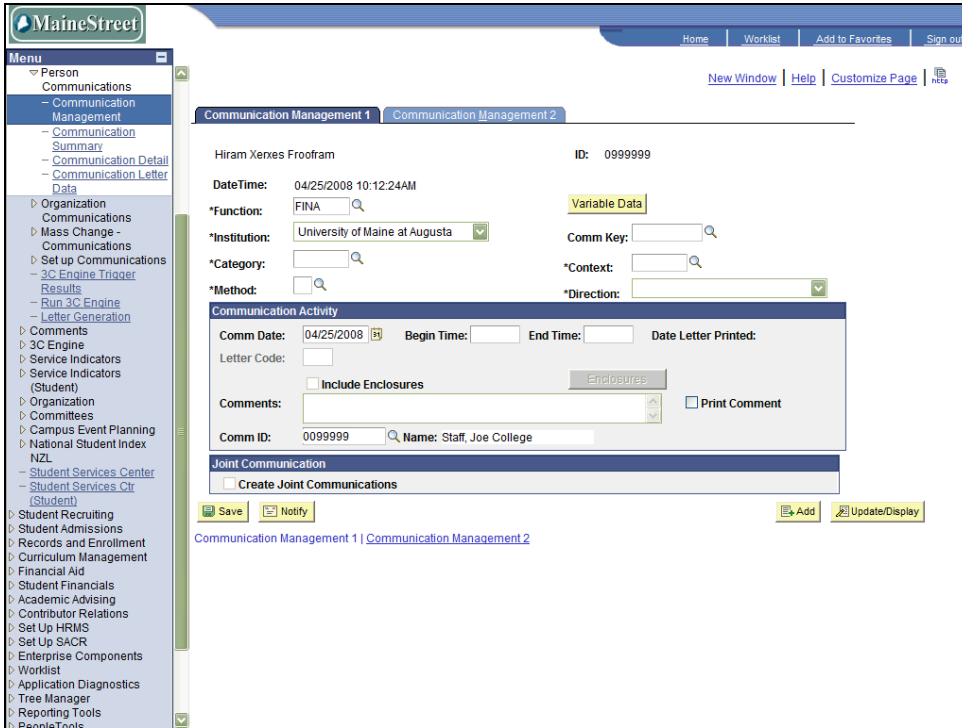
Step	Action
10.	Click the Variable Data button. 


Process Document

Financial Aid: FAN Letter Generation-042408



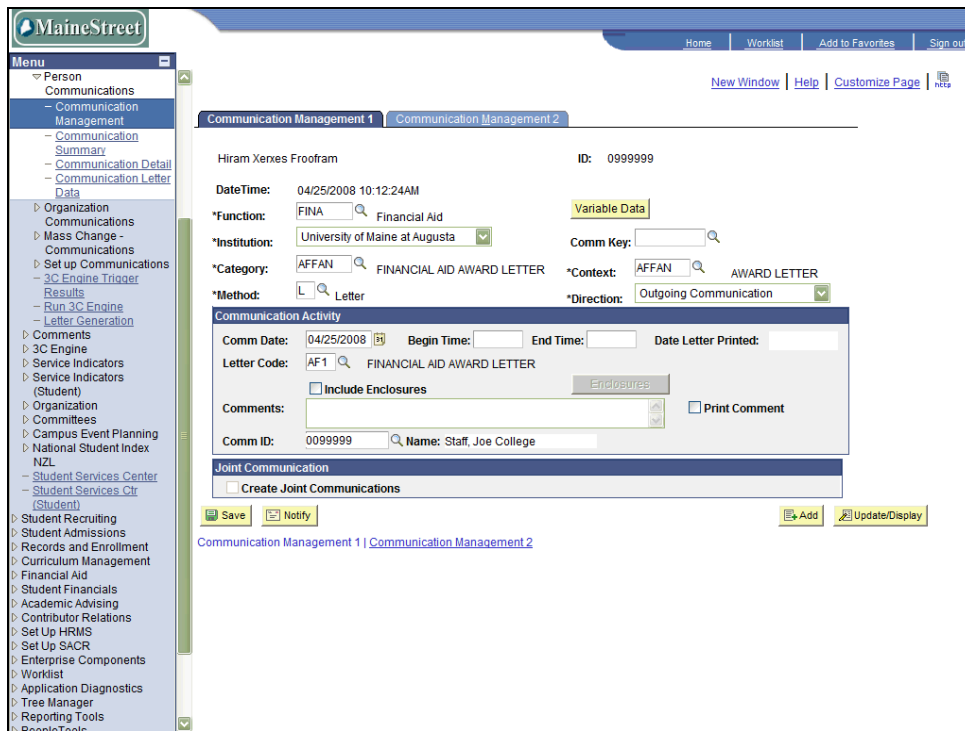
Step	Action
11.	Enter the Aid Year .
12.	Click OK . 



Step	Action
13.	<p>If there is a Comm Key set up for the FAN, select it. This will save you data entry time, because it fills in the remaining fields for you.</p> <p>Click the look up button on the Comm Key field.</p> 
14.	<p>You will see a list of all the Comm Keys set up for the FINA function, that your security settings and User Defaults settings allow you to see.</p> <p>Click the FAN entry in the list.</p>

Process Document

Financial Aid: FAN Letter Generation-042408

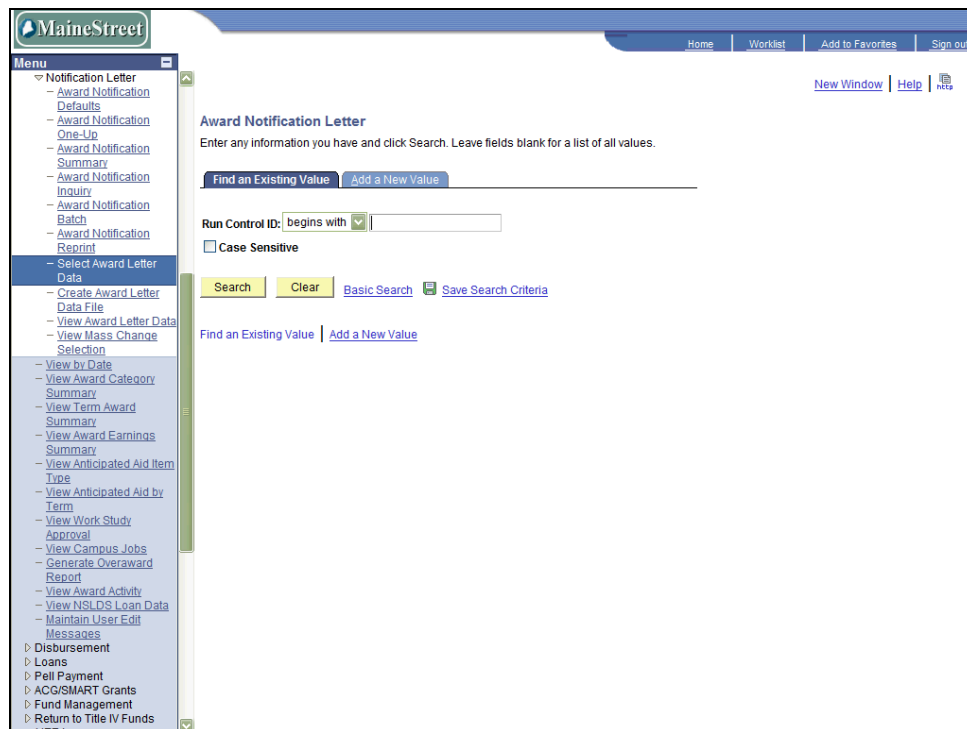



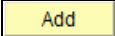
The screenshot shows the 'MaineStreet' application interface. On the left is a navigation menu with categories like 'Person', 'Organization', and 'Comments'. The main window displays the 'Communication Management' form for a student named Hiram Xerxes Froofram (ID: 0999999). The form contains several sections:

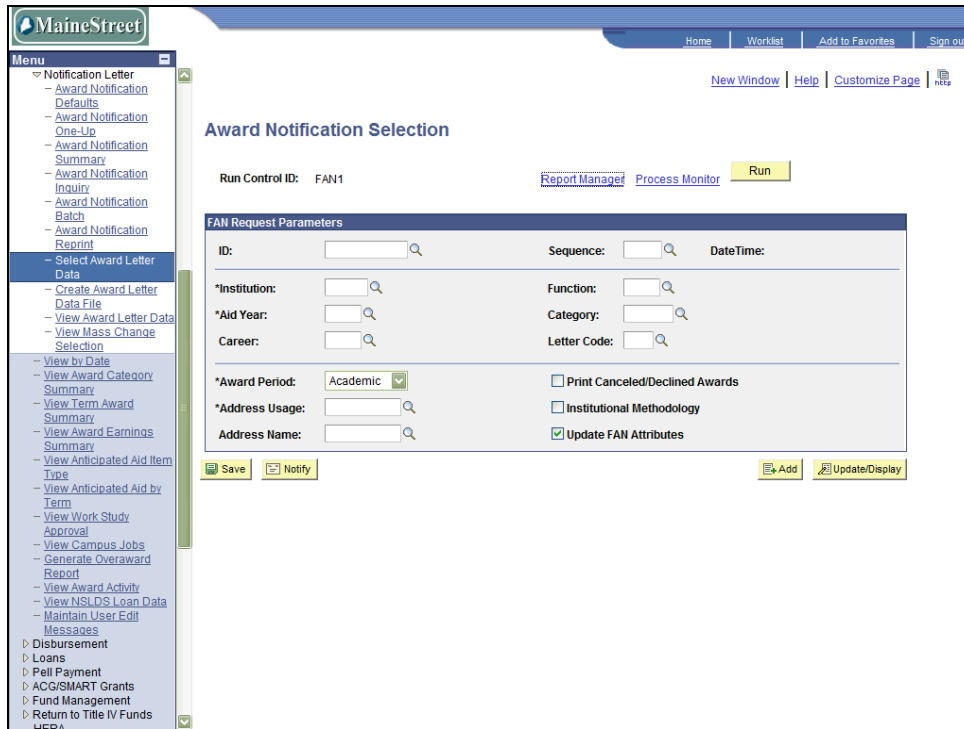
- Header:** Student Name, ID, and Date (04/25/2008 10:12:24AM).
- Fields:** *Function (FINA - Financial Aid), *Institution (University of Maine at Augusta), *Category (AFFAN - FINANCIAL AID AWARD LETTER), *Method (Letter), *Context (AFFAN - AWARD LETTER), *Direction (Outgoing Communication).
- Communication Activity:** Comm Date (04/25/2008), Letter Code (AF1 - FINANCIAL AID AWARD LETTER), and a checkbox for 'Include Enclosures'.
- Comments:** A text area for entering comments and a 'Print Comment' checkbox.
- Joint Communication:** A checkbox for 'Create Joint Communications'.
- Buttons:** 'Save', 'Notify', 'Add', and 'Update/Display'.


Step	Action
15.	<p>Selecting the Comm Key automatically fills in the remaining required fields on this page. If no Comm Key has been established you must manually enter the values for Category, Context, Method, Direction and Letter Code.</p> <p>Note the Comments field. You can enter comments to be included in the letter if desired.</p> <p>The Comm Date is the current date by default, but can be changed. The Comm ID is your emplid by default.</p> <p>Click Save. You have now assigned a FAN letter to this student.</p>

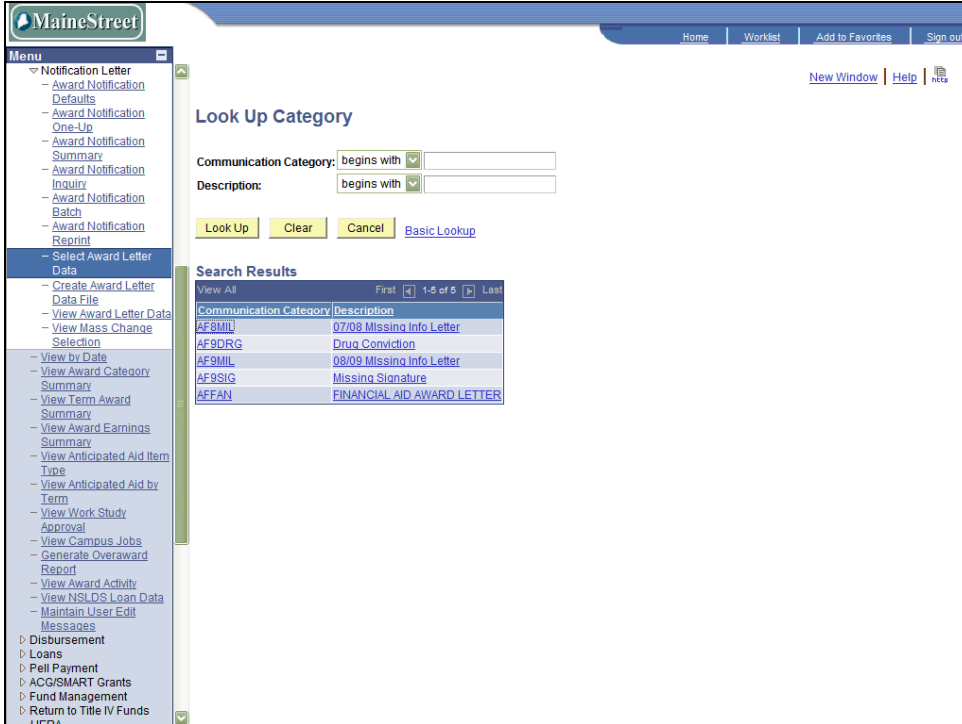
Step	Action
16.	To process the FAN, navigate: Financial Aid > Awards > Notification Letter.
17.	There are two steps to processing the FAN. Step 1 is to select the data for the award letter. Step 2 is to extract the data. For step 1, click the Select Award Letter Data link.



Step	Action
18.	You need a Run Control ID for this process. If you already have one to use, click Search and select it from the list. Otherwise, create a new Run Control ID by clicking the Add a New Value tab. 
19.	Enter a name (no blanks) for the new Run Control ID and click Add . 



Step	Action
20.	<p>On the Award Notification Selection page, you specify criteria to select the students and data to be included in the FAN generation.</p> <p>If you want to run the FAN for a single student, enter the student's ID in the ID field. Otherwise, leave the ID field blank.</p> <p>Sequence is used for the single student case. If you leave it blank, the most recent communication is used. If you select a Sequence value it will fill in the remaining fields for you.</p>
21.	<p>To generate FANs for a group of students, leave the ID and Sequence fields blank and fill in the remaining fields.</p> <p>Use the Career field to limit the process to a specific Career.</p> <p>Function is the administrative function (FINA), and Category and Letter Code are the values set up for your FAN communication.</p>
22.	<p>Look up the Category.</p> 



MaineStreet Home Worklist Add to Favorites Sign out

New Window Help

Menu

- Notification Letter
 - Award Notification Defaults
 - Award Notification One-Up
 - Award Notification Summary
 - Award Notification Inquiry
 - Award Notification Batch
 - Award Notification Reprint
 - Select Award Letter Data
 - Create Award Letter Data File
 - View Award Letter Data
 - View Mass Change Selection
 - View by Date
 - View Award Category Summary
 - View Term Award Summary
 - View Award Earnings Summary
 - View Anticipated Aid Item Type
 - View Anticipated Aid by Term
 - View Work Study Approval
 - View Campus Jobs
 - Generate Overaward Report
 - View Award Activity
 - View NSLDS Loan Data
 - Maintain User Edit Messages
- Disbursement
- Loans
- Pell Payment
- ACG/SMART Grants
- Fund Management
- Return to Title IV Funds
- HERA

Look Up Category

Communication Category: begins with

Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

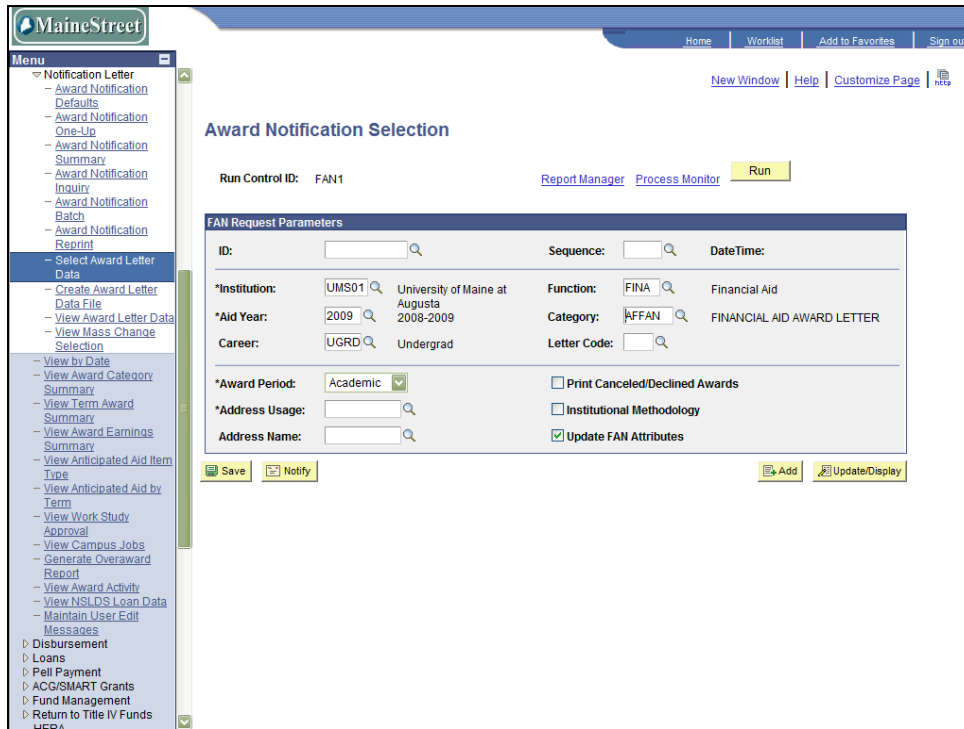
View All First 1-5 of 5 Last

Communication Category	Description
AF8MIL	07/08 Missing Info Letter
AF9DRG	Drug Conviction
AF9MIL	08/09 Missing Info Letter
AF9SIG	Missing Signature
AFFAN	FINANCIAL AID AWARD LETTER


Step	Action
23.	Select the FAN category.

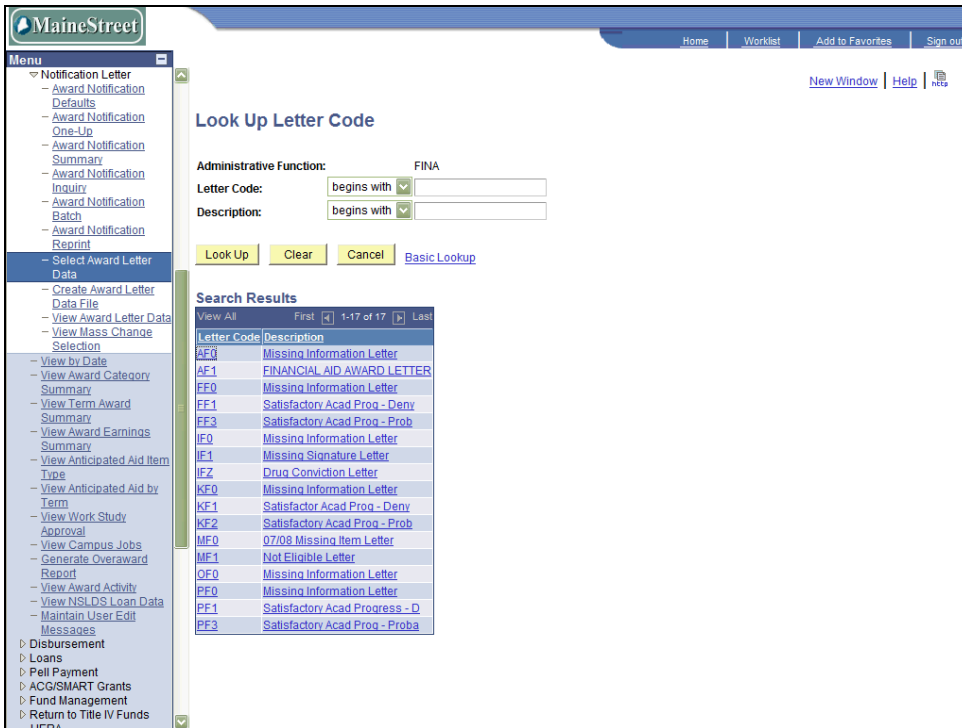
Process Document

Financial Aid: FAN Letter Generation-042408



The screenshot shows the 'Award Notification Selection' page in the MaineStreet system. The left sidebar contains a menu with options like 'Notification Letter', 'Award Notification Defaults', and 'View Award Letter Data'. The main content area has a title 'Award Notification Selection' and a 'Run Control ID: FAN1'. Below this is a 'FAN Request Parameters' form with fields for ID, Sequence, DateTime, Institution (UMS01), Aid Year (2009), Career (UGRD), Function (FINA), Category (AFFAN), and Letter Code. There are also checkboxes for 'Print Canceled/Declined Awards', 'Institutional Methodology', and 'Update FAN Attributes'. Buttons for 'Save', 'Notify', 'Add', and 'Update/Display' are visible at the bottom of the form.

Step	Action
24.	Look up the Letter Code . 



MaineStreet Home Worklist Add to Favorites Sign out

New Window Help

Menu

- Notification Letter
 - Award Notification Defaults
 - Award Notification One-Up
 - Award Notification Summary
 - Award Notification Inquiry
 - Award Notification Batch
 - Award Notification Reprint
 - Select Award Letter Data
 - Create Award Letter Data File
 - View Award Letter Data
 - View Mass Change Selection
 - View by Date
 - View Award Category Summary
 - View Term Award Summary
 - View Award Earnings Summary
 - View Anticipated Aid Item Type
 - View Anticipated Aid by Term
 - View Work Study Approval
 - View Campus Jobs
 - Generate Overaward Report
 - View Award Activity
 - View NSLDS Loan Data
 - Maintain User Edit Messages
- Disbursement
- Loans
- Pell Payment
- ACG/SMART Grants
- Fund Management
- Return to Title IV Funds
- HERA

Look Up Letter Code

Administrative Function: FINA

Letter Code: begins with

Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

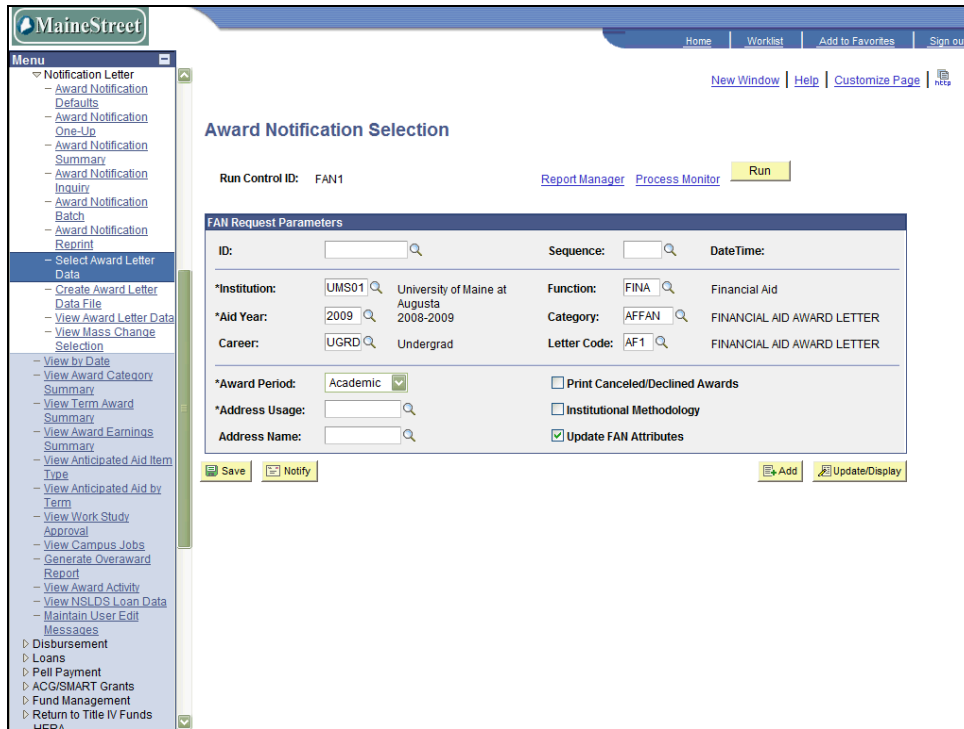
View All First 1-17 of 17 Last

Letter Code	Description
AF0	Missing Information Letter
AF1	FINANCIAL AID AWARD LETTER
FF0	Missing Information Letter
FF1	Satisfactory Acad Prog - Deny
FF3	Satisfactory Acad Prog - Prob
IF0	Missing Information Letter
IF1	Missing Signature Letter
IFZ	Drug Conviction Letter
KF0	Missing Information Letter
KF1	Satisfactor Acad Prog - Deny
KF2	Satisfactory Acad Prog - Prob
MF0	07/08 Missing Item Letter
MF1	Not Eligible Letter
OF0	Missing Information Letter
PF0	Missing Information Letter
PF1	Satisfactory Acad Prograss - D
PF3	Satisfactory Acad Prog - Proba

Step	Action
25.	Select the desired letter. <u>AF1</u> FINANCIAL AID AWARD LETTER

Process Document


Financial Aid: FAN Letter Generation-042408



The screenshot shows the 'Award Notification Selection' page in the MaineStreet system. On the left is a navigation menu with options like 'Notification Letter', 'Award Notification Defaults', and 'View Award Letter Data'. The main content area is titled 'Award Notification Selection' and includes a 'Run Control ID: FAN1' and a 'Run' button. Below this is the 'FAN Request Parameters' section, which contains several fields for configuration:

- ID:** []
- Sequence:** []
- DateTime:** []
- *Institution:** UMS01 (University of Maine at Augusta)
- *Aid Year:** 2009 (2008-2009)
- Career:** UGRD (Undergrad)
- Function:** FINA (Financial Aid)
- Category:** AFFAN (FINANCIAL AID AWARD LETTER)
- Letter Code:** AF1 (FINANCIAL AID AWARD LETTER)
- *Award Period:** Academic (dropdown menu)
- *Address Usage:** [] (with a search icon)
- Address Name:** [] (with a search icon)

 There are also checkboxes for 'Print Canceled/Declined Awards', 'Institutional Methodology', and 'Update FAN Attributes'. At the bottom of the parameters section are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'.

Step	Action
26.	<p>Make sure the correct Award Period is selected.</p> <p>The Address Usage field specifies which student address to use. To see a list of choices, click the look up button.</p> 



MaineStreet Home Worklist Add to Favorites Sign out

New Window Help

Menu

- Notification Letter
 - Award Notification Defaults
 - Award Notification One-Up
 - Award Notification Summary
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 - Select Award Letter Data
 - Create Award Letter Data File
 - View Award Letter Data
 - View Mass Change Selection
 - View by Date
 - View Award Category Summary
 - View Term Award Summary
 - View Award Earnings Summary
 - View Anticipated Aid Item Type
 - View Anticipated Aid by Term
 - View Work Study Approval
 - View Campus Jobs
 - Generate Overaward Report
 - View Award Activity
 - View NSLDS Loan Data
 - Maintain User Edit Messages
- Disbursement
- Loans
- Pell Payment
- ACG/SMART Grants
- Fund Management
- Return to Title IV Funds
- HERA

Look Up Address Usage

Address Usage: begins with

Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

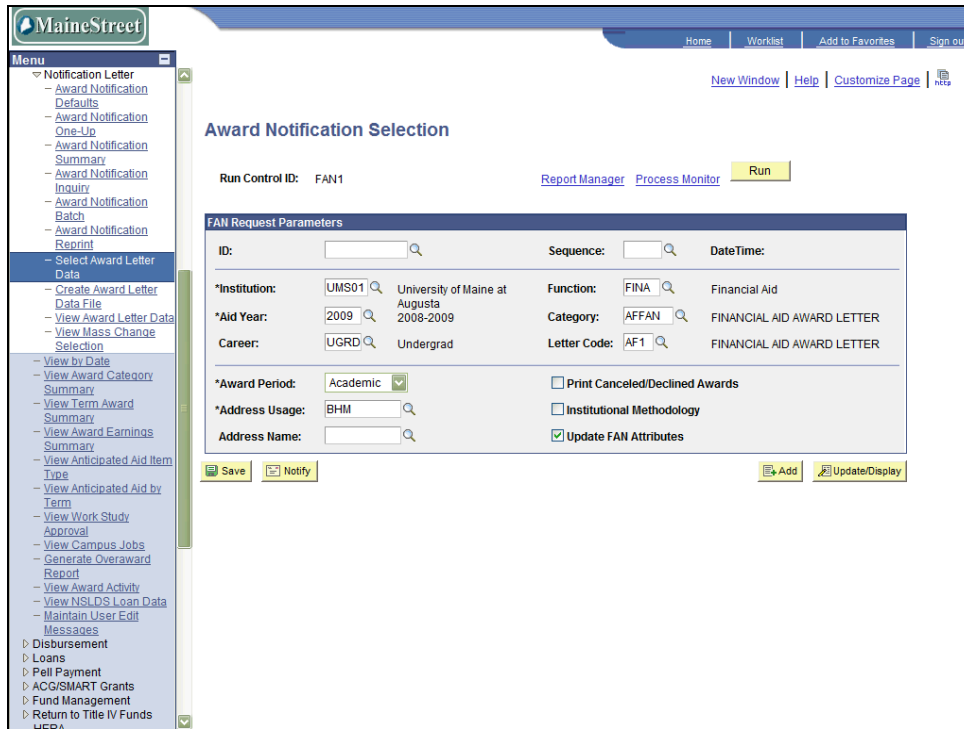
View All First 1-10 of 10 Last

Address Usage	Description
BCHH	Billing_Campus_Mail_Home
BHM	Billing_Home_Mailing
CAMP	Campus
CMH	Campus_Mail_Home
EBUSCAHOTH	Email Bus_Campus_Home_Other
ECAMPHMOTH	Email Campus_Home_Other
EHOMEOTHR	Email Home_Other
EMAIL	Email Home_Campus_Business
HOME	Home
MH	Mail_Home


Step	Action
27.	Select the desired usage. For example, selecting "BHM" means that if the student has a Billing address, that will be used for the FAN. If not, use the student's Home address. Failing that, use the student's Mailing address.
	BHM Billing_Home_Mailing

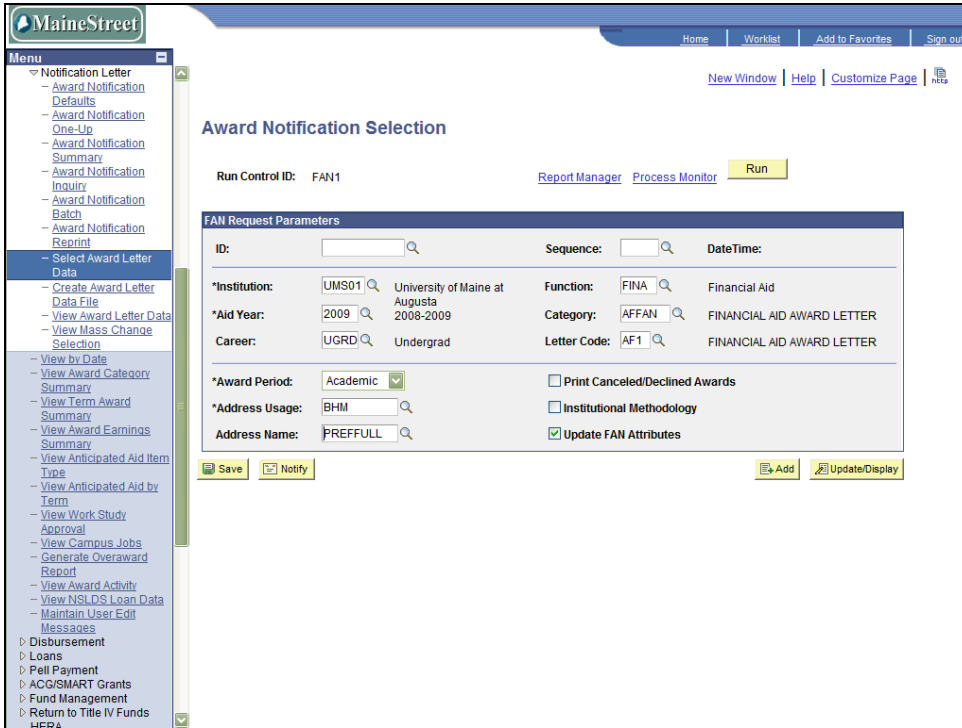
Process Document

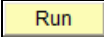
Financial Aid: FAN Letter Generation-042408



The screenshot shows the 'Award Notification Selection' interface in the MaineStreet system. On the left is a navigation menu with options like 'Notification Letter', 'Award Notification Defaults', and 'View Award Letter Data'. The main area contains a 'FAN Request Parameters' form with fields for ID, Sequence, DateTime, Institution (UMS01 University of Maine at Augusta), Aid Year (2009), Career (UGRD Undergrad), Function (FINA Financial Aid), Category (AFFAN FINANCIAL AID AWARD LETTER), and Letter Code (AF1 FINANCIAL AID AWARD LETTER). There are also checkboxes for 'Print Canceled/Declined Awards', 'Institutional Methodology', and 'Update FAN Attributes'. Buttons for 'Save', 'Notify', 'Add', and 'Update/Display' are visible at the bottom of the form.

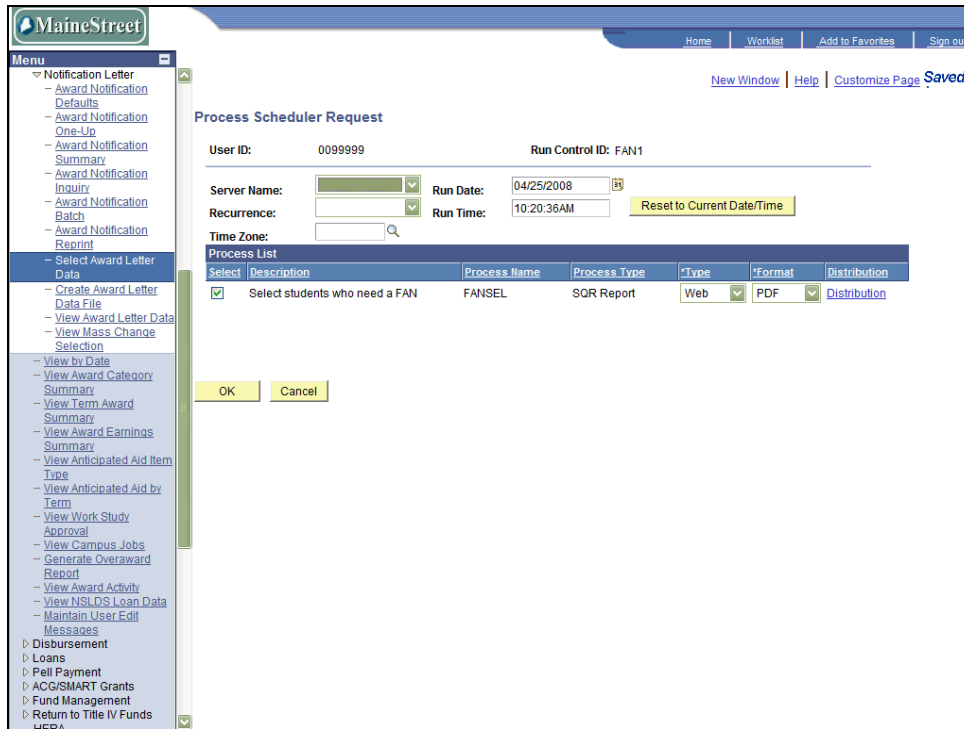
Step	Action
28.	The student may have multiple names entered in Campus Community. Use the Address Name field to specify which to use for this communication. Click the look up to see the choices. 
29.	Select a Name choice from the list. PREFFULL Preferred Full Name



Step	Action
30.	<p>The Update FAN Attributes box should be checked. Leave the Institutional Methodology box unchecked. If you want to include Canceled and Declined awards, check that box.</p> <p>Click the Run button to run the process.</p> <p style="text-align: center;"></p>

Process Document

Financial Aid: FAN Letter Generation-042408



MaineStreet Home | Worklist | Add to Favorites | Sign out

[New Window](#) | [Help](#) | [Customize Page](#) **Saved**

Process Scheduler Request

User ID: 0099999 Run Control ID: FAN1

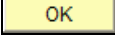
Server Name: [Dropdown] Run Date: 04/25/2008 [B] [B]

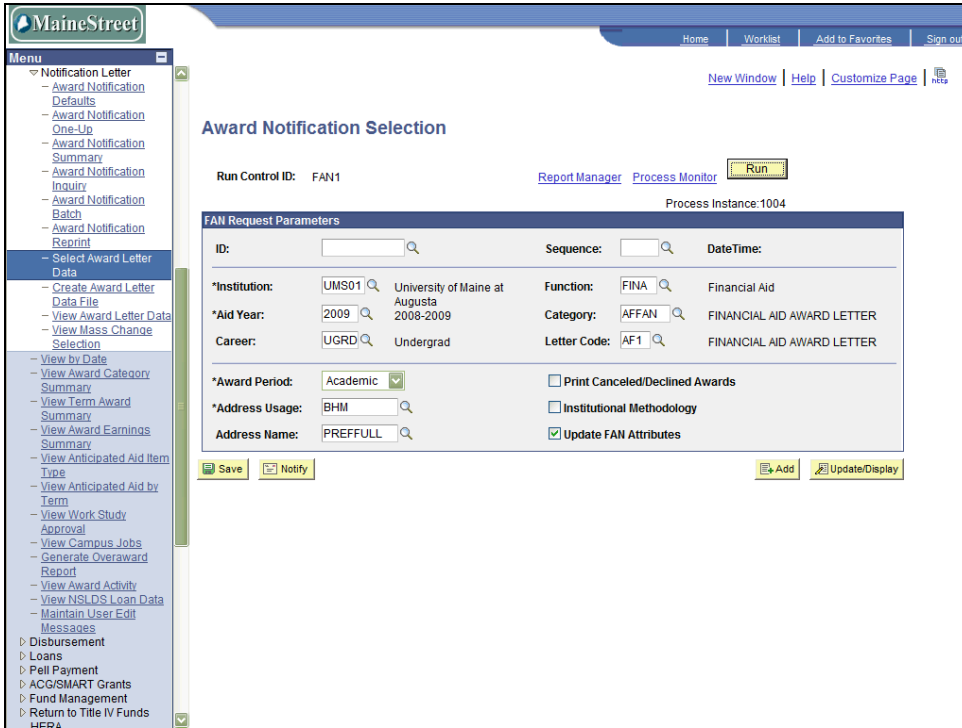
Recurrence: [Dropdown] Run Time: 10:20:36AM [Reset to Current Date/Time](#)

Time Zone: [Dropdown]

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Select students who need a FAN	FANSEL	SQR Report	Web	PDF	Distribution

[OK](#) [Cancel](#)

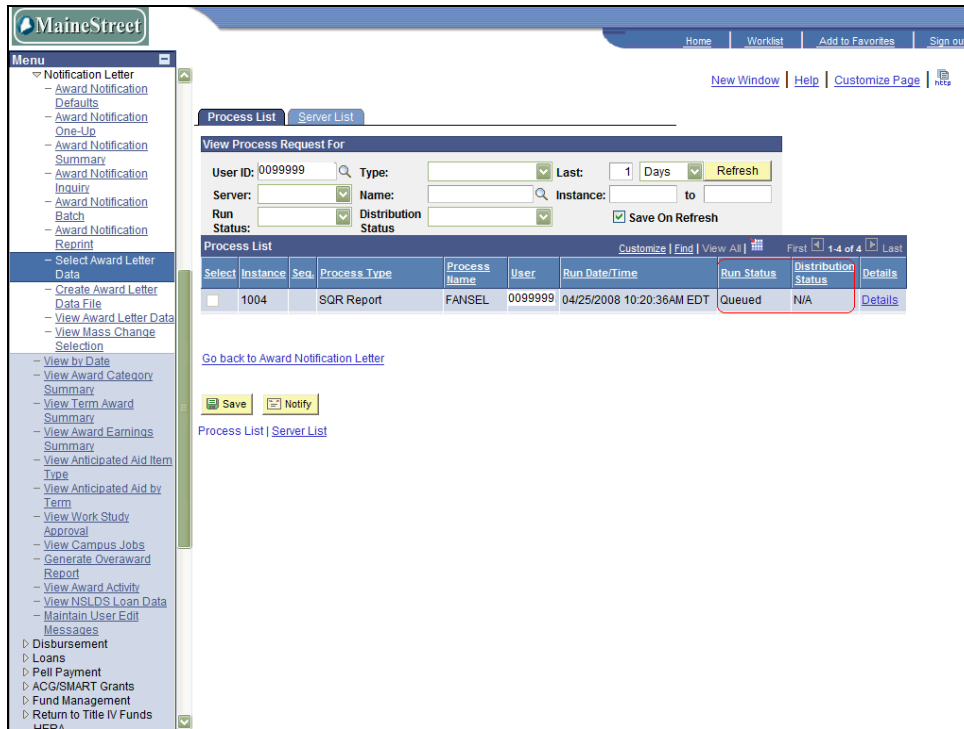
Step	Action
31.	Click OK . 



Step	Action
32.	Click the Process Monitor link. Process Monitor

Process Document

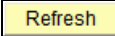
Financial Aid: FAN Letter Generation-042408



The screenshot shows the 'MaineStreet' web application interface. On the left is a navigation menu with various options under 'Notification Letter'. The main content area is titled 'Process List' and 'Server List'. It features a 'View Process Request For' section with search fields for User ID (0099999), Server, Name, Instance, Run Status, and Distribution Status. A 'Refresh' button is visible. Below this is a table with the following data:

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1004		SQR Report	FANSEL	0099999	04/25/2008 10:20:36AM EDT	Queued	N/A	Details

Below the table are buttons for 'Save' and 'Notify', and a link to 'Go back to Award Notification Letter'. The 'Run Status' and 'Distribution Status' columns in the table are highlighted with a red box in the original image.

Step	Action
33.	On this page, click the Refresh button from time to time until the Run Status is Success and the Distribution Status is Posted . 
34.	Once the process has successfully run, you can click the Details link to see messages.



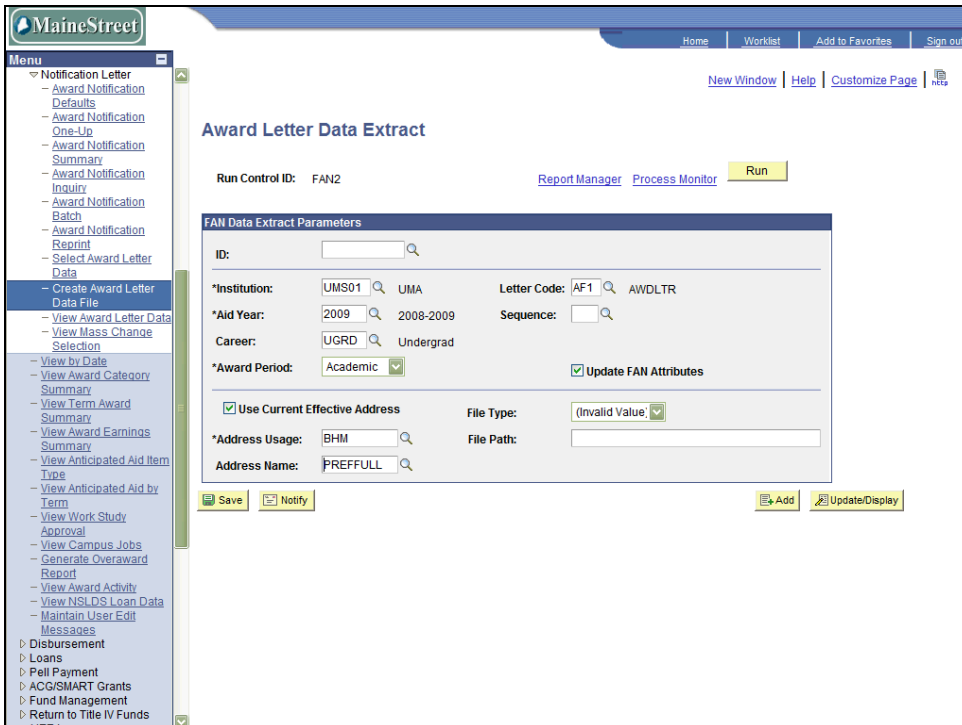
The screenshot shows the MaineStreet web application interface. On the left is a navigation menu with various options under 'Award Notification Letter'. The main content area is titled 'Process List' and 'Server List'. Below this is a 'View Process Request For' form with fields for User ID (0099999), Type, Last (1 Days), Server, Name, Instance, Run Status, and Distribution Status. A 'Refresh' button is present. Below the form is a table with the following data:

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1004		SQR Report	FANSEL	0099999	04/25/2008 10:20:36AM EDT	Success	Posted	Details

Below the table are buttons for 'Save' and 'Notify', and a link to 'Go back to Award Notification Letter'. At the bottom, there are links for 'Process List' and 'Server List'.

Step	Action
35.	<p>You are ready to perform step 2 in the FAN generation process.</p> <p>Click the Create Award Letter Data File link.</p> <p>Create Award Letter Data File</p>
36.	<p>You need a Run Control ID for the process. Either select an existing one or create a new one. To create a new Run Control ID, enter the name and click the Add button.</p> <p>Add</p>

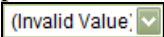

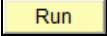
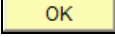
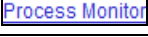
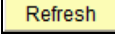
Step	Action
37.	On the Award Letter Data Extract page enter parameters for the process. You will probably enter the same values you used in the Select Award Letter Data process.



The screenshot shows the 'Award Letter Data Extract' form in the MaineStreet application. The form is titled 'Award Letter Data Extract' and has a 'Run Control ID' of 'FAN2'. There are links for 'Report Manager', 'Process Monitor', and a 'Run' button. The 'FAN Data Extract Parameters' section contains the following fields:

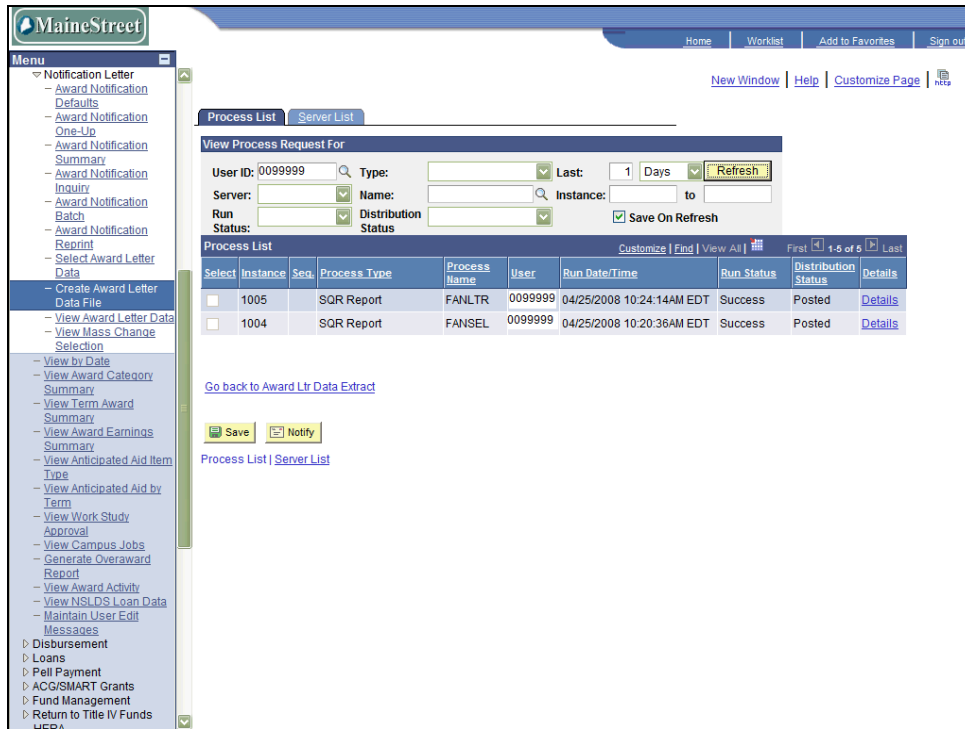
- ID: [Empty]
- *Institution: UMS01 (UMA)
- Letter Code: AF1 (AWDLTR)
- *Aid Year: 2009 (2008-2009)
- Sequence: [Empty]
- Career: UGRD (Undergrad)
- *Award Period: Academic (Update FAN Attributes checked)
- Use Current Effective Address
- File Type: (Invalid Value)
- *Address Usage: BHM
- File Path: [Empty]
- Address Name: PREFFULL

Buttons at the bottom include 'Save', 'Notify', 'Add', and 'Update/Display'.

Step	Action
38.	The File Type should be CSV to generate a data extract file that you can merge with your FAN letter template using MS Word or some other word processor. Click the pull-down File Type menu to see the choices. 
39.	Select CSV. You don't need to fill in the File Path field. 
40.	Leave File path, Template Path and Send to Printer blank. Click Run . 
41.	Click OK . 
42.	Click the Process Monitor link. 
43.	Click Refresh until the Run Status is Success and the Distribution Status is Posted.. 

Process Document

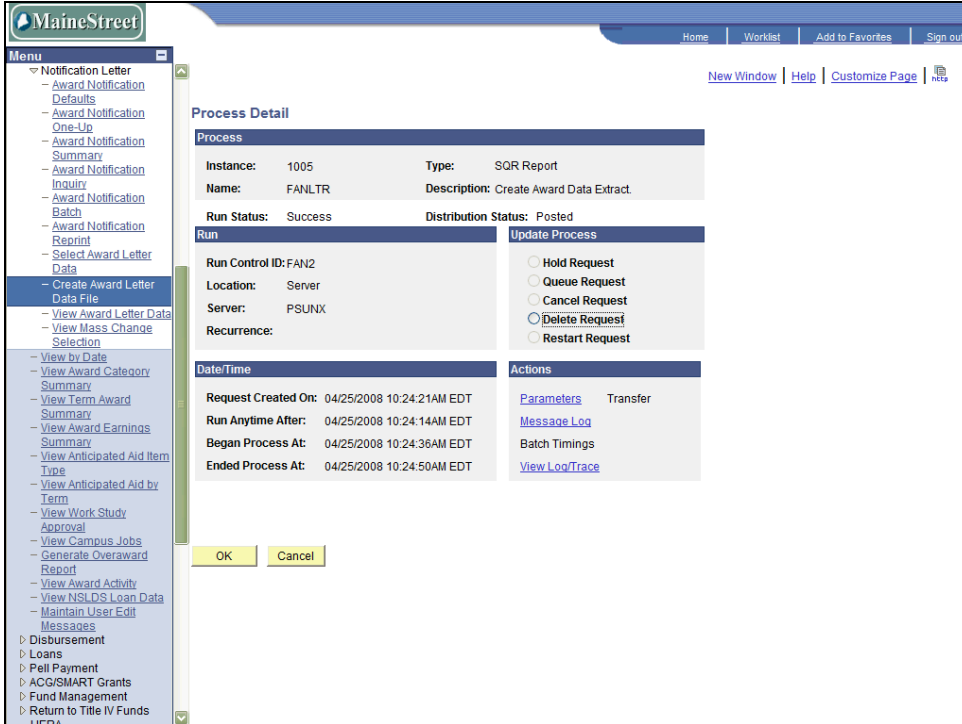
Financial Aid: FAN Letter Generation-042408




The screenshot shows the 'MaineStreet' application interface. On the left is a navigation menu with options like 'Notification Letter', 'Award Notification', and 'Create Award Letter Data File'. The main area is titled 'View Process Request For' and contains search filters for User ID (0099999), Server, Name, Instance, Run Status, and Distribution Status. Below the filters is a 'Process List' table with columns for Instance, Seq, Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details. Two rows are visible: Instance 1005 (SQR Report, FANLTR, 0099999, 04/25/2008 10:24:14AM EDT, Success, Posted) and Instance 1004 (SQR Report, FANSEL, 0099999, 04/25/2008 10:20:36AM EDT, Success, Posted). A 'Details' link is present in the last column of each row. Below the table are 'Save' and 'Notify' buttons, and a link to 'Go back to Award Ltr Data Extract'.

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1005		SQR Report	FANLTR	0099999	04/25/2008 10:24:14AM EDT	Success	Posted	Details
<input type="checkbox"/>	1004		SQR Report	FANSEL	0099999	04/25/2008 10:20:36AM EDT	Success	Posted	Details

Step	Action
44.	Click the Details link. Details



MaineStreet Home Worklist Add to Favorites Sign out

New Window | Help | Customize Page | 

Menu

- Notification Letter
 - Award Notification Defaults
 - Award Notification One-Up
 - Award Notification Summary
 - Award Notification Inquiry
 - Award Notification Batch
 - Award Notification Reprint
 - Select Award Letter Data
 - Create Award Letter Data File
 - View Award Letter Data
 - View Mass Change Selection
 - View by Date
 - View Award Category Summary
 - View Term Award Summary
 - View Award Earnings Summary
 - View Anticipated Aid Item Type
 - View Anticipated Aid by Term
 - View Work Study Approval
 - View Campus Jobs
 - Generate Overaward Report
 - View Award Activity
 - View NSLDS Loan Data
 - Maintain User Edit Messages
- Disbursement
- Loans
- Pell Payment
- ACG/SMART Grants
- Fund Management
- Return to Title IV Funds
- HERA

Process Detail

Process

Instance: 1005 Type: SQR Report
 Name: FANLTR Description: Create Award Data Extract.

Run Status: Success Distribution Status: Posted

Run

Run Control ID: FAN2
 Location: Server
 Server: PSUNX
 Recurrence:

Update Process

Hold Request
 Queue Request
 Cancel Request
 Delete Request
 Restart Request

Date/Time

Request Created On: 04/25/2008 10:24:21AM EDT
 Run Anytime After: 04/25/2008 10:24:14AM EDT
 Began Process At: 04/25/2008 10:24:36AM EDT
 Ended Process At: 04/25/2008 10:24:50AM EDT

Actions

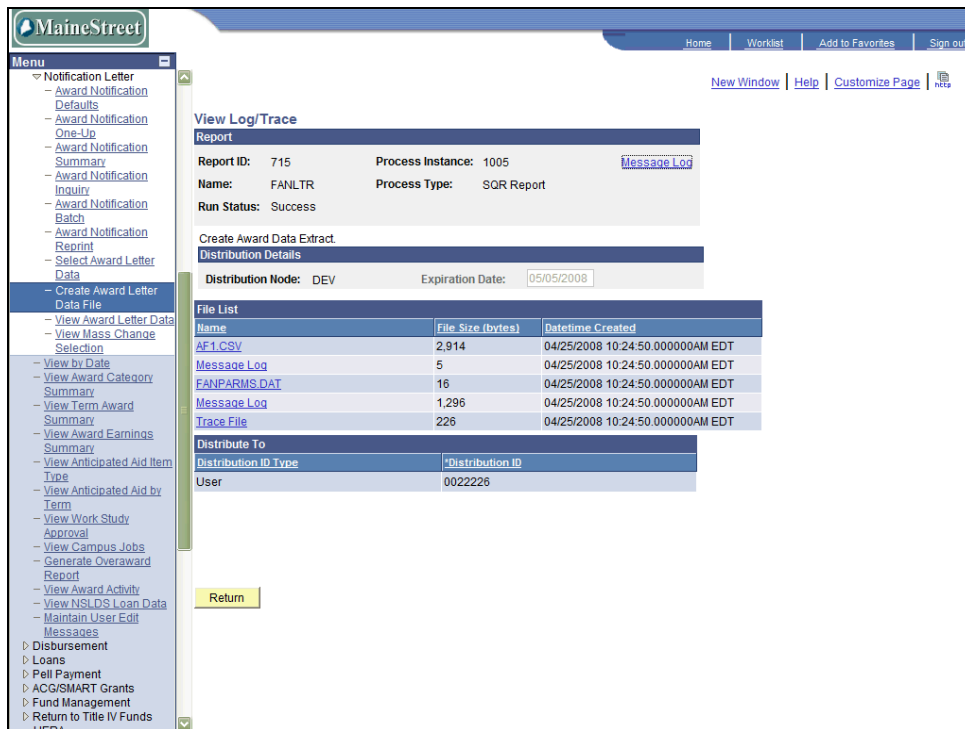
[Parameters](#) Transfer
[Message Log](#)
 Batch Timings
[View Log/Trace](#)

OK Cancel

Step	Action
45.	Click the View Log/Trace link. View Log/Trace

Process Document

Financial Aid: FAN Letter Generation-042408



The screenshot shows the 'MaineStreet' web application interface. On the left is a navigation menu with categories like 'Notification Letter', 'Award Notification', 'View Award Letter Data', and 'Disbursement'. The main content area is titled 'View Log/Trace' and contains the following information:

Report
 Report ID: 715 Process Instance: 1005 [Message Log](#)
 Name: FANLTR Process Type: SQR Report
 Run Status: Success

Create Award Data Extract
Distribution Details
 Distribution Node: DEV Expiration Date: 05/05/2008

File List

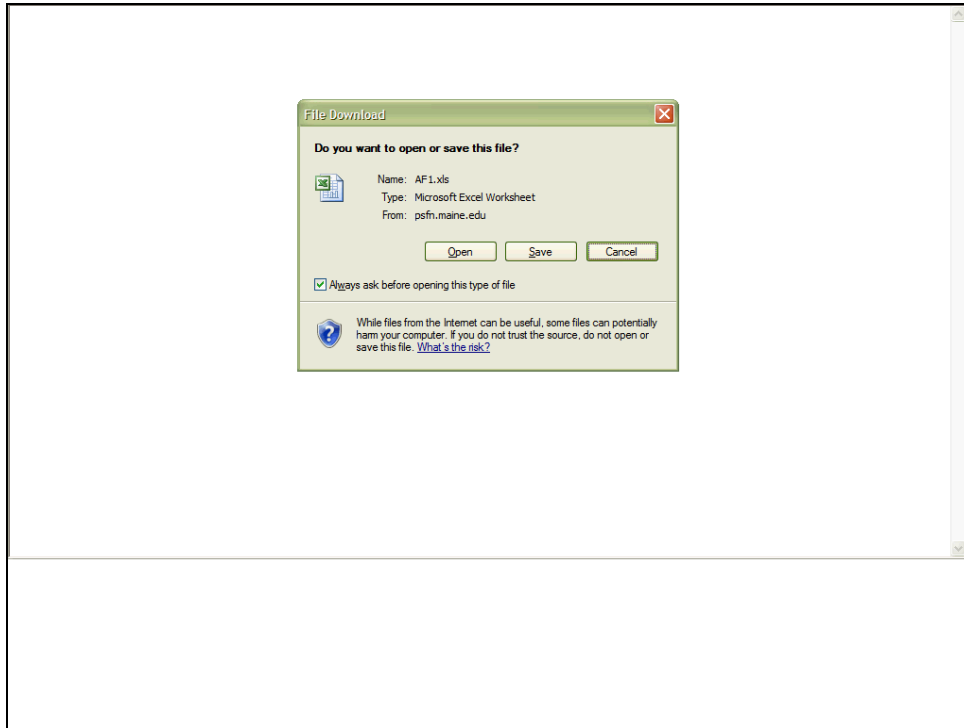
Name	File Size (bytes)	Datetime Created
AF1.CSV	2,914	04/25/2008 10:24:50.000000AM EDT
Message Log	5	04/25/2008 10:24:50.000000AM EDT
FANPARMS.DAT	16	04/25/2008 10:24:50.000000AM EDT
Message Log	1,296	04/25/2008 10:24:50.000000AM EDT
Trace File	226	04/25/2008 10:24:50.000000AM EDT

Distribute To

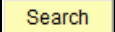
Distribution ID Type	*Distribution ID
User	0022226

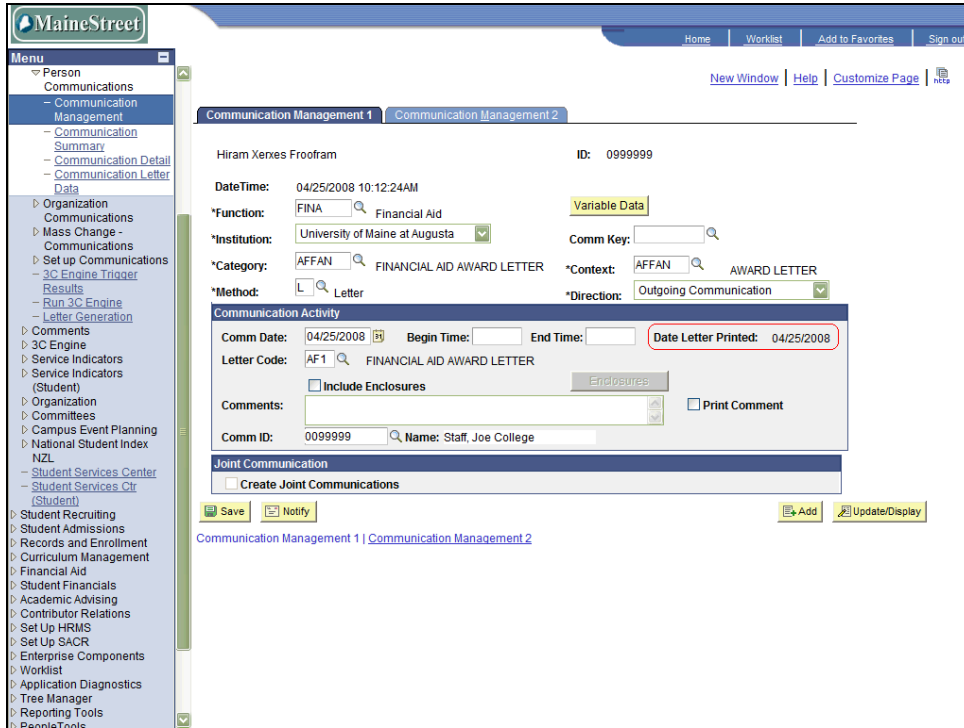
At the bottom of the main content area, there is a yellow 'Return' button.

Step	Action
46.	<p>The extract file appears in the File List. Its name is XXX.CSV where "XXX" is the letter code assigned to the FAN letter.</p> <p>Click the CSV file.</p> <p>AF1.CSV</p>



Step	Action
47.	<p>Depending on your browser set up you may see a new window containing a message like this one. You can choose to open the CSV file in Excel or simply save it to your hard drive.</p> <p>In either case, you will download the file from the server to your desktop computer.</p> <p>Once downloaded, you can merge the file with your FAN letter template in MS Word to create and print the FAN letters.</p>
48.	<p>If you navigate once again to the Communications Management page, you can verify that the system has marked the communication as complete.</p> <p>Navigate: Campus Community > Communications > Person Communications > Communication Management.</p>

Step	Action
49.	This time you will view an existing communication rather than adding a new one. Enter the student's ID in the ID field. Click Search . 



The screenshot shows the 'MaineStreet' application interface. On the left is a navigation menu with categories like 'Person', 'Communications', 'Organization', and 'Student Recruiting'. The main content area is titled 'Communication Management 1' and 'Communication Management 2'. It displays details for a communication from 'Hiram Xerxes Frooman' (ID: 0999999) dated '04/25/2008 10:12:24AM'. The 'Date Letter Printed' field is highlighted in red and contains the value '04/25/2008'. Other fields include 'Function: FINA Financial Aid', 'Institution: University of Maine at Augusta', 'Category: AFFAN FINANCIAL AID AWARD LETTER', and 'Method: Letter'. There are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'.

Step	Action
50.	<p>On the Communications Management 1 page note that there is a Date Letter Printed value.</p> <p>Click the Communications Management 2 tab.</p> <p>Communication Management 2</p>

Process Document

Financial Aid: FAN Letter Generation-042408



The screenshot shows the 'MaineStreet' web application interface. On the left is a navigation menu with categories like 'Person', 'Communications', 'Organization', and 'Comments'. The main content area is titled 'Communication Management' and shows details for a communication for 'Hiram Xenex Froofram' with ID '0999999'. The details include:

- DateTime:** 04/25/08 10:12:24AM
- Function:** Financial Aid
- Institution:** University of Maine at Augusta
- Category:** FINANCIAL AID AWARD LETTER
- Context:** AWARD LETTER
- Department:** [Searchable field]

 Below these details is a 'Communication Outcome' section with two options:

- Communication Completed** (Date Activity Completed: 04/25/2008)
- Unsuccessful Outcome** (Reason: [Dropdown])

 At the bottom of the form are buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'.

Step	Action
51.	<p>On this page, note that the Communication Completed checkbox is selected. This indicates that the data extract for this letter was performed.</p> <p>Of course, the system has no way of knowing whether you have performed the mail merge and have sent the actual letter.</p>
52.	End of Procedure.