

FAN Letter Generation-042408

1.	<p>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.</p> <p>Navigate to Assign Awards to a Student: Financial Aid > Awards > Award Processing > Assign Awards to a Student.</p> <p>Enter search criteria to identify the student. The Student Aid Package page is displayed.</p>
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>
4.	<p>Because you are adding the FAN communication to the student, click the Add a New Value tab.</p>
5.	<p>Enter the student's ID in the ID field.</p>
6.	<p>Click Add.</p>
7.	<p>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.</p>
8.	<p>Select the Administrative Function for this letter. Use the look up button to see your choices.</p>
9.	<p>The FAN letter has FINA administrative function. Select FINA in the list.</p>
10.	<p>Click the Variable Data button.</p>
11.	<p>Enter the Aid Year.</p>
12.	<p>Click OK.</p>
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. 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. Click the FAN entry in the list.</p>

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>
16.	<p>To process the FAN, navigate: Financial Aid > Awards > Notification Letter.</p>
17.	<p>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.</p> <p>For step 1, click the Select Award Letter Data link.</p>
18.	<p>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. Enter a name (no blanks) for the new Run Control ID and click Add</p>
19.	<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. 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>
20.	<p>To generate FANs for a group of students, leave the ID and Sequence fields blank and fill in the remaining fields. 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>
21.	<p>Select the FAN Category.</p>
22.	<p>Look up the Letter Code.</p>
23.	<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>
24.	<p>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.</p>
25.	<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>
26.	<p>Click OK.</p>
27.	<p>Click the Process Monitor link.</p>
28.	<p>On this page, click the Refresh button from time to time until the Run Status is <i>Success</i> and the Distribution Status is <i>Posted</i>.</p>

29.	Once the process has successfully run, you can click the Details link to see messages.
30.	You are ready to perform step 2 in the FAN generation process. Click the Create Award Letter Data File link.
31.	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.
32.	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.
33.	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.
34.	Leave File path, Template Path and Send to Printer blank. Click Run .
35.	Click OK .
36.	Click the Process Monitor link.
37.	Click Refresh until the Run Status is <i>Success</i> and the Distribution Status is <i>Posted</i> .
38.	Click the Details link.
39.	Click the View Log/Trace link.
40.	The extract file appears in the File List. Its name is XXX.CSV where "XXX" is the letter code assigned to the FAN letter. Click the CSV file.
41.	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. In either case, you will download the file from the server to your desktop computer. Once downloaded, you can merge the file with your FAN letter template in MS Word to create and print the FAN letters.
42.	If you navigate once again to the Communications Management page, you can verify that the system has marked the communication as complete. Navigate: Campus Community > Communications > Person Communications > Communication Management .
43.	This time you will view an existing communication rather than adding a new one. Enter the student's ID in the ID field.
44.	Click Search .
45.	On the Communications Management 1 page note that there is a Date Letter Printed value. Click the Communications Management 2 tab.
46.	On this page, note that the Communication Completed checkbox is selected. This indicates that the data extract for this letter was performed.
47.	End of Procedure.