

9.2 Authorization Failure Report

Purpose: To run the authorization failure report in ctcLink.

Audience: Financial Aid staff.

Used to review student aid that failed to authorize for disbursement.

 You must have at least one of these local college managed security roles:

- ZD FA Director
- ZD FA Disbursements
- ZZ FA Disbursements
- ZZ FA Funds Manager

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Known Issue for the FA913 PDF:

Any authorization of an award that you 'override' will continue to remain on the report because the error was not 'resolved' but 'overridden'. It would be the same idea for those awards that have never disbursed due to an authorization failure then you cancelled their awards. The error remains on the report since the authorization process will not pick up a combination like \$0 Accepted \$0 Authorized \$0 Disbursed to re-authorize the aid. The report looks for one of those amounts not being a non-zero.

Workaround:

The queries CTC_FA913 and QCS_FA913_WITH_ERROR_COUNT have additional criteria of "authorized amount do not equal the accepted amount" so the students mentioned above as a known issue are eliminated from the results.

Authorization Failure Report

Navigation: NavBar > Navigator > Financial Aid > Disbursement > Authorization Failure Report

1. The Authorization Failure Rpt run control search page displays. On the search page, enter a New or Use an existing **Run Control ID**.
2. Select the **Add** or **Search** button. The Authorization Failure Report page will display.

3. On the Authorization Failure Report page, in the **Parameters** section, populate the following fields:
 - a. **Academic Institution**
 - b. **Aid Year** - use the Aid Year in which you are processing.
 - c. **Term** (*Note Ensure this matches the term used in the authorization process)
4. Select the **Run** button. The Process Scheduler Request page will display.

5. On the Process Scheduler Request page, ensure the checkbox for the report is selected.
6. Select the **OK** button. The Authorization Failure report page will display.

Process Scheduler Request

User ID 201253052 Run Control ID FAILURE_RPT

Server Name Run Date 12/26/2018

Recurrence Run Time 9:31:03AM

Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Authorization Failure Report	FA913	BI Publisher	Web	PDF	Distribution

7. From the Authorization Failure Report page, make note of the **Process Instance** number.
8. Select the **Process Monitor** link. The Process List tab will display.

Authorization Failure Report

Run Control ID FAILURE_RPT Report Manager **Process Monitor**

Process Instance: 21356789

Parameters

*Academic Institution	WA220	Tacoma CC
*Aid Year	2018	2017-2018 Financial Aid Year
Term	2181	WINTER 2018
Fin Aid Type	<input type="text"/>	
Source	<input type="text"/>	
Item Type	<input type="text"/>	

9. On the Process List tab, select the **Refresh** button until the **Run Status** = Success and **Distribution Status** = Posted.
10. Select the **Go Back to Authorization Failure Rpt** link. The Authorization Failure Report page will display.

Process List | [Server List](#)

View Process Request For

User ID: Type: Last: 1 Days

Server: Name: Instance From: Instance To:

Run Status: Distribution Status: ☒ Save On Refresh

Process List Personalize | Find | View All |

First 1 of 1 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	21356789		BI Publisher	FA913	201253052	12/26/2018 9:31:03AM PST	Success	Posted	Details

[Go back to Authorization Failure Rpt](#)

[Process List](#) | [Server List](#)

- On the Authorization Failure Report page, select the **Report Manager** link. The Report Manager tabs will display.

Authorization Failure Report

Run Control ID: FAILURE_RPT

Report Manager | Process Monitor |

Parameters

*Academic Institution: Tacoma CC

*Aid Year: 2017-2018 Financial Aid Year

Term: WINTER 2018

Fin Aid Type:

Source:

Item Type:

- From the Administration tab, select the "FA913-Authorization Failure Report.pdf" link. A new window will open with report results.

List | Explorer | **Administration** | Archives

View Reports For

User ID 201253052 Type Last 1 Days Refresh

Status Folder Instance to

Report List Personalize | Find | View All | | First 1 of 1 Last

Select	Report ID	Pros Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	904618	21356789	FA913 - Authorization Failure Report.pdf	12/26/2018 9:32:56AM	Acrobat (*.pdf)	Posted	Details

☒ Select All ☐ Deselect All

Delete Click the delete button to delete the selected report(s)

[Go back to Authorization Failure Rpt](#)

List | Explorer | Administration | Archives

13. The report displays in .pdf format.

14. The process to run the authorization failure report is now complete.

Query Process

i The Authorization Failure Report can be ran as a query and put into an Excel spreadsheet.

Used to work the student list whose aid failed to authorize for disbursement.

! You must have at least one of these local college managed security roles:

- ZD_DS_QUERY_VIEWER

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Navigation: NavBar > Navigator > Reporting Tools > Query > Query Viewer

1. The Query Viewer search page displays. On the search page, enter the **Query Name:** CTC_FA913.
2. Select the **Search** button. The Search Results will display.

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By begins with

[Advanced Search](#)

- On the Search Results section, select the **Excel** link for the chosen query. The query parameters page will display.

Search Results

*Folder View

Query				Personalize	Find	View All	First	1-3 of 3	Last
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
CTC_FA913	Authorization Failure Report	Public	FINANCIAL AID	HTML	Excel	XML	Schedule	Lookup References	Favorite
CTC_FA913_LOAD	Authorization Failure Report	Public	FINANCIAL AID	HTML	Excel	XML	Schedule	Lookup References	Favorite
CTC_FA913_LOAD_ENROLLED_NOTSAP	Authorization Failure Meet SAP	Public	FINANCIAL AID	HTML	Excel	XML	Schedule	Lookup References	Favorite

- On the query parameters page, enter the **Institution**.
- Enter the **Aid Year**.
- Select the **View Results** button.

CTC_FA913 - Authorization Failure Report

Institution

Aid Yr

Institution	Aid Yr	ID	Name	Item Type	Item Type Descr	Run Date/Time	Message	Term	Strm Descr	Disbt ID	Set	Msg	Finaid Typ	Source	SetID	Accepted	Authorized	Disbursed
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- A message should open asking how you want to see the report; i.e., Open, Save, etc.
- Select **Open**. The Excel file will open. Review as needed and save if applicable.
- The optional process to run the authorization failure report is now complete.
- End of procedures.