From Mass Emails to Personalized Award Letters: Using 3C Engine and CommGen to Correspond with Students

Session #30245
March 18, 2012
Your Presenter

- William Adamchik
- Administrative Systems Analyst in the Student Financial Aid Office at the University of Louisville
- 5 years experience in Financial Aid
- 5 years experience with PeopleSoft
  - Includes upgrade transition to 9.0 in 2010
University of Louisville

- 4-year public institution
- Total Enrollment: 22,249
- Three Campuses
  - One PeopleSoft Setup
- Undergraduate
- Graduate
- Law
- Dental
- Medical
UofL and PeopleSoft

- First went live in 1999
- Campus Solutions 9.0
- Upgraded to 9.0 in October 2010
- PeopleTools version 8.51
- Bundle 24
Have you...

- Used Communication Generation?
- Used 3C Engine and Population Selection?
- Used XML Publisher for Reporting?
Agenda

• Communications Setup
• Communication Generation
• 3C Engine
• Tips and Tricks
• Questions
Today, we will...

...understand how to utilize the delivered PeopleSoft functionality to produce emails and letters.

...learn the terminology associated with the processes related to communications.

...walk away feeling comfortable using these tools to produce communications for your office.

...LEARN!
A case study

• Meet Louie
• We will learn about him throughout today’s workshop
• Will help to understand the concepts being presented
• Representation of the recipient of our communications
Email #1
University A

Subject: Thank you for applying

Dear Student,
Thank you for your application to University A. Please visit the following website to determine if your application file is complete http://AUniversity.edu/apply/account. If your application is sufficiently complete to process and you will soon be notified of your status. If you have previously attended the University A, it is not necessary for you to submit an official transcript.

You may track the status of your application online. For easy, first-time log in directions go to http://AUniversity.edu/accountsetup. After initial log-in, follow the instructions to navigate to “My Application Status.”

Thank you,
University A

Office of Admissions
(999) 555-1212

---

Email #2
University B

Subject: Thank you for applying

Admissions Office
e-mail: admit@UniversityB.edu
online: www.UniversityB.edu/admissions

Louie, thank you for your application to University B!

We’ve received your application to the University B. The credentials needed to complete your application are listed below in the area designated “Missing Credentials.” Please review this section carefully and submit any required documentation to our office as soon as possible. If you have previously attended University B, it is not necessary for you to submit an official transcript.

<table>
<thead>
<tr>
<th>Missing Credentials</th>
</tr>
</thead>
<tbody>
<tr>
<td>High School Transcript*</td>
</tr>
<tr>
<td>Letter of Recommendation</td>
</tr>
</tbody>
</table>

*Transcripts Needed From: Fischer County High School

All credentials must be official and mailed to the University B Admissions Office:

123 University Drive
Collegetown, TN 99999

You may track the status of your application online. Click here for easy, first-time login directions. After your initial log-in, follow the instructions to navigate to “View My Application Status.”

If you have questions regarding your application, please call the Office of Admissions at (999) 555-1212.

Destination Address: louie.student@university.edu (CAMP)
Communications Setup

A little setup before any communications can be sent
Communications Setup

• Many may already be in place
• Have a plan
  – Write it out
  – Keep track
• Decide on naming conventions
• Time-consuming, but worthwhile
Communications Setup

- Campus Community > Communications > Set up Communications
  - Standard Letter Table
  - Communications Context Table
  - Communications Category Table
  - Communication 3C Groups
  - Communications Speed Key Table
  - Communications Data Source
<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Letter Table CS</td>
<td>Set up standard letter codes to be used in Campus Solutions communications.</td>
</tr>
<tr>
<td>Communication Context Table</td>
<td>Set up contexts for the communications process.</td>
</tr>
<tr>
<td>Communication Category Table</td>
<td>Set up categories to use in the communications process.</td>
</tr>
<tr>
<td>Communication 3C Groups</td>
<td>Include communications in 3C groups for security purposes.</td>
</tr>
<tr>
<td>Communication Speed Key Table</td>
<td>Manage Speed Keys for communications.</td>
</tr>
<tr>
<td>Communication Data Source</td>
<td>Define communication data source to be used in Campus Solutions communications.</td>
</tr>
</tbody>
</table>
Standard Letter Code

- This will be the individual letter code that gets assigned to a student.
- Each message that you plan to send should have its own letter code.
### Communication Context Table

- **Letter Codes** are assigned a Context
- Can have multiple Letter Codes in a Context

#### Communication Context

<table>
<thead>
<tr>
<th>Academic Institution:</th>
<th>UOFL1</th>
<th>University of Louisville</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communication Context:</td>
<td>FA-FAR</td>
<td></td>
</tr>
</tbody>
</table>

**Communication Context Description**

- **Effective Date:** 01/01/1901
- **Status:** Active
- **Description:** FAFSA Received and Loaded
- **Short Desc:** FAFSAhere

**Communication Context Method**

<table>
<thead>
<tr>
<th>Method</th>
<th>Direction</th>
<th>Letter Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>E-Mail</td>
<td>Outgoing Communication</td>
<td>FAFSA</td>
<td>FAFSA Received and Loaded</td>
</tr>
</tbody>
</table>

[Add button]
Communication Category Table

- Contexts are grouped together in Categories
- Broadest classification of communications setup.
Communications 3C Groups

- Allows users to assign this category of communications
- Must add for each category
Communication Speed Key Table

- Allows for quick assignment of communication
- Will be used by 3C Engine to add communication record to students
- Can also be used to assign a communication manually
Set Up SACR Speed Key

- Must give yourself access to the Speed Key in Set Up SACR
- Allows you to use the Speed Key

Set Up SACR > User Defaults > Communication Speed Keys
Communications Setup

3C Group

Categories

Contexts

Letter Codes
Communications Setup

Letter Code → Context → Category
Communication Record

Campus Community > Communications > Person Communications > Communication Management

Communication Assignment

Assign Date Time: 02/02/2012 11:16:42AM
*Function: FINA Financial Aid
*Institution: University of Louisville
Comm Key: 
*Category: FA-FAE FA Email Communications
*Context: FA-FAR FAFSA Received and Loaded
*Method: E E-Mail
*Direction: Outgoing Communication
Letter Code: FAR FAFSA Received and Loaded

Communication Process Details

Communication Date: 02/02/2012
Begin Time: 
End Time: 
Comments: Student sent email indicating that we have received their FAFSA. Email indicated we will [Print Comment]
Communication ID: 
Department: 

Communication Outcome

Communication Generation Date: 02/02/2012
*Communication Completed
Date Activity Completed: 02/02/2012
Reason: 
Language Used: English
Method Used: E-Mail
Process Used: CommGen
Process Instance: 2589434

Checklist Association

Sequence: 
Item Sequence: 

Save Return to Search Previous in List Next in List Notify Add UpdateDisplay
Campus Community > Communications > Set up Communications

<table>
<thead>
<tr>
<th>Main Menu &gt; Campus Community &gt; Communications &gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Set up Communications</strong></td>
</tr>
<tr>
<td>Define values required to assign communications.</td>
</tr>
</tbody>
</table>

- **Standard Letter Table CS**
  - Set up standard letter codes to be used in Campus Solutions communications.

- **Communication Context Table**
  - Set up contexts for the communications process.

- **Communication Category Table**
  - Set up categories to use in the communications process.

- **Communication 3C Groups**
  - Include communications in 3C groups for security purposes.

- **Communication Speed Key Table**
  - Manage Speed Keys for communications.

- **Communication Data Source**
  - Define communication data source to be used in Campus Solutions communications.
Communication Generation
Setup
The “WHAT”
“WHAT” do we want to know about Louie

- “WHAT” do we want to communicate to him?
  - Custom Data Source

- Is it in PeopleSoft?

- Can it be queried?
  - Return fields that pertain only to him
  - Merged into text of communication
Dear Louie,

Thank you for filing the 2012-2013 Free Application for Federal Student Aid (FAFSA). Your FAFSA was processed on March 18, 2012. You should continue to monitor your mail and your e-mail for important notifications from our office. If you need to make corrections to your FAFSA you can do so online at www.fafsa.ed.gov.

Our records indicate that you are currently enrolled in 12.0 hours for the upcoming Fall 2012 semester. Based on this information, we would award you as a Full-Time, Undergraduate student.

Once you have been awarded, a Financial Aid Notification will be sent to your Campus e-mail address: louie.student@university.edu.

Good luck as you pursue your educational goals at University B!

Financial Aid Office
University B
Communication Data Source

- Delivered fields for each administrative function
- Uses a basic query to pull in any available field in PeopleSoft
- Can use multiple queries to retrieve data
  - HINT: Create multiple data sources to pull data for different types of communications
    - FAFSA Emails vs. Award Emails
- Data Sources must be registered before they can be used
Delivered fields

### Communication Data Source

**Data Source Map ID**: OA_CSFINA_FAFA

**Description**: For use with FAFSA Comms

**Object Owner ID**: 

**Data Source Type**: XMLDoc Object

### Data Source Context

**Administrative Function**: FINA | Financial Aid

### Generic Process Data

<table>
<thead>
<tr>
<th>Sequence</th>
<th>Description</th>
<th>Sample Data Folder Name</th>
<th>Critical Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>List of Checklist Items</td>
<td>CHECKLIST_ITEMS</td>
<td>☐</td>
</tr>
<tr>
<td>2</td>
<td>List of Enclosures</td>
<td>ENCLOSURES</td>
<td>☐</td>
</tr>
<tr>
<td>3</td>
<td>Address for a person</td>
<td>PER_ADDRESS</td>
<td>☐</td>
</tr>
<tr>
<td>4</td>
<td>List of Person Communication Recipients</td>
<td>PER_COMM_RECP</td>
<td>☐</td>
</tr>
<tr>
<td>5</td>
<td>Email Address for Person</td>
<td>PER_EMAIL</td>
<td>☐</td>
</tr>
<tr>
<td>6</td>
<td>Name for individual address</td>
<td>PER_NAME_ADDR</td>
<td>☐</td>
</tr>
<tr>
<td>7</td>
<td>Name for extra use</td>
<td>PER_NAME_EXTRA</td>
<td>☐</td>
</tr>
<tr>
<td>8</td>
<td>Name for individual salutation</td>
<td>PER_NAME_SAL</td>
<td>☐</td>
</tr>
<tr>
<td>9</td>
<td>Name for joint salutation</td>
<td>PER_NAME_SALINT</td>
<td>☐</td>
</tr>
</tbody>
</table>

### Custom Extract Data

<table>
<thead>
<tr>
<th>Sequence</th>
<th>Type</th>
<th>Query Name</th>
<th>Max Nbr</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Query</td>
<td></td>
<td>15</td>
</tr>
</tbody>
</table>

**Registered Date/Time**: 10/22/10 11:36:02AM

**Registered By**: WJADAM02

**Last Update Date/Time**: 01/05/12 4:51:11PM

**Last Update User ID**: WJADAM02

Click the Register Data Source button to update XML Publisher Data Source.
## Communication Data Source

**Data Source Map ID**
QA_CS_FINAFAFSA

**Description**
For use with FAFSA Comms

**Object Owner ID**

**Data Source Type**
XMLDoc Object  ✔ Active

### Data Source Context

**Administrative Function**
FINA  ✔ Financial Aid  ✔ Person  ✔ Organization

### Generic Process Data

<table>
<thead>
<tr>
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<td></td>
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<td>6</td>
<td>Name for individual address</td>
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<td>PER_NAME_EXTRA</td>
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<td>PER_NAME_SAL</td>
<td></td>
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<td>9</td>
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<td>PER_NAME_SALINT</td>
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### Custom Extract Data

<table>
<thead>
<tr>
<th>Sequence</th>
<th>Type</th>
<th>Query Name</th>
<th>Max Nbr</th>
<th>Application Class</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Query</td>
<td>QA_CS_FA_COMM_FAFSA</td>
<td>15</td>
<td></td>
</tr>
</tbody>
</table>

**Registered Date/Time**
10/22/10 11:36:02AM

**Registered By**
WJADAM02

**Last Update Date/Time**
01/05/12 4:51:11PM

**Last Update User ID**
WJADAM02

---

Click the Register Data Source button to update XML Publisher Data Source.
Data Source Query (‘WHAT’)

• Simple Query that includes prompts to find fields for one student at a time
• Prompts will reflect the Administrative Function the communication is tied to
  – Refer to the Variable Data on the Communication Record for guidance
  – Oracle White Paper – CS 9.0 Communications Setup: Appendix A
  – http://www.heug.org/p/do/sd/sid=9356&fid=9656&req=direct
Data Source Query (‘WHAT’)

- Fields will be available to merge into communication being sent
Prompts should return the specified fields for just one ID
Unique Prompt Names

- Person ID fields = PERSON_ID
- Organization ID fields = ORG_ID
- Person and Org ID fields = COMMON_ID
- Campus Community > Communications > Set Up Communications > Communication Data Source

- Must register Data Source Query in order for it to be used by CommGen
  - Re-Register Data source if query changes

Click the Register Data Source button to update XML Publisher Data Source.
- Campus Community > Communications > Set Up Communications > Communication Data Source

- Open file by clicking on link and save in a secure location
**Oracle BI Publisher Plugin**

- Reporting Tools > XML Publisher > Setup > Design Helper
- Must download and install prior to designing template for emails and letters
  - Ensure you have administrator rights on computer

**Design Helper**

- **Plug-in for Microsoft Word (requires 2000 or later)**
  Facilitates the insertion of application data tags into RTF templates.

- Will also install helpful files on your computer at:
  Start > All Programs > Oracle BI Publisher Desktop
Oracle BI Publisher Plugin

- Reporting Tools > XML Publisher > Setup > Design Helper
- Known issue with .EXD files
  - Cached installation files

- Solution
  - Search C drive for *.EXD (include hidden files)
  - Rename them to .EXDBAK or .BAK
  - Restart and open Word
Microsoft Office and Template Building

- Microsoft Word “Add Ins” Tab
- Load XML Data Source
- Insert Fields in the text of your communication
  - Like a mail merge
  - Fields will be pulled from the Data Source and inserted into the template when Communication Generation runs
- Template should be saved as Rich Text Format (RTF)
  - Can also use PDF
Template Building
Template Building
**Template Building**

- Insert Field Dialog
- Lists all available fields from your Data Source
- Select fields and insert into your document
- Custom Extract Data from query are located at the end of the list

*Click Insert.*
Financial Aid Office
e-mail: financialaid@UniversityB.edu
online: www.UniversityB.edu/financialaid

Dear Louie,

Thank you for filing the 2012-2013 Free Application for Federal Student Aid (FAFSA). Your FAFSA was processed on March 18, 2012. You should continue to monitor your mail and your e-mail for important notifications from our office. If you need to make corrections to your FAFSA you can do so online at www.fafsa.ed.gov.

Our records indicate that you are currently enrolled in 12.0 hours for the upcoming Fall 2012 semester. Based on this information, we would award you as a Full-Time, Undergraduate student.

Once you have been awarded, a Financial Aid Notification will be sent to your Campus e-mail address: louis.student@university.edu.

Good luck as you pursue your educational goals at University B!
Dear fld_FIRST_NAME,

Thank you for filing the DESCRIPTIVE Free Application for Federal Student Aid (FAFSA). Your FAFSA was processed on PROCESS_DT. You should continue to monitor your mail and your e-mail for important notifications from our office. If you need to make corrections to your FAFSA you can do so online at www.fafsa.ed.gov.

Our records indicate that you are currently enrolled in ENROLL_HRS hours for the upcoming Fall TERM semester. Based on this information, we would award you as a ENROLL_STAT, ENROLL_CAREER student.

Once you have been awarded, a Financial Aid Notification will be sent to your Campus e-mail address: fld_EMAIL_ADDR.

Good luck as you pursue your educational goals at University B!

Financial Aid Office
University B

Destination Address: fld_EMAIL_ADDR (fld_E_ADDR_TYPE)
Financial Aid Office
University B

e-mail: financialaid@UniversityB.edu
online: www.UniversityB.edu/financialaid

Destination Address: fid_EMAIL_ADDR (fid_E_ADDR_TYPE)
Dear fld_FIRST_NAME,

Thank you for filing the DESCRIPTOR Free Application for Federal Student Aid (FAFSA). Your FAFSA was processed on PROCESS_DT. You should continue to monitor your mail and your e-mail for important notifications from our office. If you need to make corrections to your FAFSA you can do so online at www.fafsa.ed.gov.

Our records indicate that you are currently enrolled in ENROLL_HRS hours for the upcoming Fall TERM semester. Based on this information, we would award you as a ENROLL_STAT, ENROLL_CAREER student.

Once you have been awarded, a Financial Aid Notification will be sent to your Campus e-mail address: fld_EMAIL_ADDR.

Good luck as you pursue your educational goals at University B!

Financial Aid Office
University B

Destination Address: fld_EMAIL_ADDR (fld_E_ADDR_TYPE)
Template Building

- Edit Individual Fields
- Change Formatting Type
  - Text
  - Number
  - Date
- Click on “Word Properties” for additional formatting options
Report Definition

• Reporting Tools > XML Publisher > Report Definition
• Uses Data Source that was created earlier
  – XMLDoc Object
• Each Communication to be sent should have its own Report Definition
• Can have multiple Templates under one Report Definition
  – Multiple Languages
  – Different Outgoing Methods
Security Roles

• XMLP Report Developer
• XMLP Power User
• User must have query access to the records being used by your Data Sources
Report Definition – Definition Tab

- Report Status = Active
- Report Category ID = ALLUSER
- Object Owner ID = PeopleTools
- Template Type RTF (or PDF)
• Reporting Tools > XML Publisher > Report Definition
• Add new rows for new templates files
• Don’t delete old templates if you make updates
  • CommGen requires past effective-dated templates
## Report Definition - Output Tab

### General

**Report Name:** FAFAR_1

<table>
<thead>
<tr>
<th>Format Type</th>
<th>Enabled</th>
<th>Default</th>
</tr>
</thead>
<tbody>
<tr>
<td>HTML</td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>PDF</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>RTF</td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>XLS</td>
<td>✔️</td>
<td></td>
</tr>
</tbody>
</table>

**Output Location**

- **Location:** Any

<table>
<thead>
<tr>
<th>File Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>
Report Definition - Properties Tab

- Reporting Tools
  > XML Publisher
  > Report Definition

- When generating letters, pdf-security must be ‘false’
Standard Letter Code

- Must associate Report Definition back to the letter code that will use the template
- Can tie multiple Report Definitions to a single Letter Code

Campus Community > Communications > Set Up Communications > Standard Letter Code
Standard Letter Code

- Must associate Report Definition back to the letter code that will use the template
- Can tie multiple Report Definitions to a single Letter Code
- Letter Printed Data will determine what data are save to Communication record
3C Engine Setup

The “WHO”
3C Engine – The “WHO”

• Query-based process to determine the population to whom you will be sending your communication
• Altogether separate query from the one used previously in CommGen setup
• Used to assign new communication record to individuals
• “Bind record” must be used
Louie is “WHO”

• Criteria should defined who you want to receive your communication
• Applied for Admission
  – Missing a transcript
• Filed his FAFSA
  – Needs to be informed
• Registered for classes
  – Has a bill
Pop Select Query

- Query may be as simple or as complex as needed to select the population you want to receive your communication
- Query MUST contain a “Bind” record
  - SCC_PS_****_BND
Pop Select Query

- Use the “Key” of the Bind record as a guide
- Specific to the Administrative Function
Pop Select Query

- Fields of query must be the “Key” records of the Bind record.
  - Does not have to be from the Bind record
Event Definition

- Campus Community > 3C Engine > Set Up 3C Engine > Event Definition
- Once your query is finalized and you know “WHO” you are going to be sending your communication to, an Event ID must be created
- Event ID defines what PeopleSoft will add to a record for an Emplid
  - Communication
  - Comment
  - Checklist
  - Combination
**Event Definition**

---

**Event Definition**

- **Academic Institution:** University of Louisville
- **Event ID:** FA-FAR

**Event Detail**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Date</td>
<td>01/01/1901</td>
</tr>
<tr>
<td>Status</td>
<td>Active</td>
</tr>
<tr>
<td>Description</td>
<td>FAFSA Received and Loaded</td>
</tr>
<tr>
<td>Short Description</td>
<td>FAFSAhere</td>
</tr>
<tr>
<td>Function</td>
<td>FINA</td>
</tr>
<tr>
<td>Communications</td>
<td></td>
</tr>
<tr>
<td>Comm Key</td>
<td>FA-FAR</td>
</tr>
</tbody>
</table>

**Communications**

- **Comm Key:** FA-FAR
  - FAFSA Received and Loaded

---

**Checklists**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checklist Code</td>
<td></td>
</tr>
</tbody>
</table>

---

**Variable Data Joint Rules**
Event 3C Groups

- Campus Community > 3C Engine > Set Up 3C Engine > Event 3C Groups
- Must give permission to access Event Definition
- 3C Engine cannot be set up and run without permission

![Event 3C Groups](image)
Assign and Send

3C Engine & CommGen
Together
3C Engine

• Campus Community > Communications > Run 3C Engine
• Put all the pieces together
Event 3C Groups - Duplicate Assignment Tab

Duplicate Communication Check

- Check Duplicate Communication
  - Explain

Additional Conditions to Prevent Duplicate Communication
- Variable Data: Match
  - Explain
- Communication Status:
  - Explain

Duplicate Checklist Check

- Check Duplicate Checklist
  - Explain

Additional Conditions to Prevent Duplicate Checklist
- Variable Data:
  - Explain
- Checklist Status:
  - Explain
**Communication Assignment**

Assign DateTime: 02/02/2012 11:16:42AM

*Function: FINA Financial Aid

*Institution: University of Louisville

Comm Key: 

*Category: FA-FAE FA Email Communications

*Context: FA-FAR FAFSA Received and Loaded

*Method: E-Mail

*Direction: Outgoing Communication

Letter Code: FAR FAFSA Received and Loaded

Include Enclosures

**Communication Process Details**

Communication Date: 02/02/2012 Begin Time:  End Time: 

Comments: Student sent email indicating that we have received their FAFSA. Email indicated we will

Communication ID: 

Department: 2060300161 Financial Aid

Create Joint Communications

**Communication Outcome**

Communication Generation Date: 02/02/2012

Communication Completed

Date Activity Completed: 3x

Unsuccessful Outcome

Language Used

Method Used

Process Used
Communication Generation

- Campus Community > Communications > Communication Generation
- Final Piece to sending communication
- Run Control setup allows user to customize run-time parameters
No valid queries found in the first 300 items evaluated. Enter search criteria for better results. (14100,875)

No valid queries found in the first 300 items evaluated. Enter search criteria for better results.
**Run Control ID:** Comm-FAR

### Usage Tables

#### Person Communication Usage
- **Address:** All available email addresses
- **Address Name:** Pref Full, Prim Full
- **Salutation:** Pref Full, Prim Full
- **Extra Name:** Pref Full, Prim Full

#### Joint Salutation Usage
- **Joint Name:**

#### Org Communication Usage
- **Org Recipient:**
- **Contact Name:**

### Communication Processing Dates

#### Communication Date Range Selection
- **From Date:** 02/03/2012
- **To Date:** 02/29/2012

#### Update Communication Generation Date With
- Communication Date
- System Date
- User Supplied Date

#### Update Communication Completed Date With
- Communication Date
- System Date
- User Supplied Date

### Output Settings
- **Sort Option:** All Alphabatically by ID Type
- **Online Preview**
- **Send to Printer**
- **Send to File**
- **Create Envelopes**
- **Create Labels**

### Missing Critical Data
- **Produce Communication**
- **Complete Communication**
Address Usage Table

- Set Up SACR > Product Related > Campus Community > Establish People Processing > Setup > Address Usage Table

- Define the order of addresses that CommGen will try when generating a communication
  - Email Addresses
  - Mailing Addresses
### Address Usage Table

- Set Up SACR > Product Related > Campus Community > Establish People Processing > Setup > Address Usage Table

#### Address Usage

<table>
<thead>
<tr>
<th>Address Usage:</th>
<th>EMAIL_ALL</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Description:</em></td>
<td>All available email addresses</td>
</tr>
<tr>
<td>Short Description:</td>
<td>Email_All</td>
</tr>
</tbody>
</table>

#### Usage Definition

<table>
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<tr>
<th>*Usage Order</th>
<th>*Usage Type</th>
<th>Email Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>E-Mail</td>
<td>Campus</td>
</tr>
<tr>
<td>20</td>
<td>E-Mail</td>
<td>Home</td>
</tr>
<tr>
<td>30</td>
<td>E-Mail</td>
<td>Business</td>
</tr>
<tr>
<td>40</td>
<td>E-Mail</td>
<td>Other</td>
</tr>
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</table>

### Address Usage

- Set Up SACR > Product Related > Campus Community > Establish People Processing > Setup > Address Usage Table

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</tr>
<tr>
<td>40</td>
<td>E-Mail</td>
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</table>
Email Parameters

*From: finaid@louisville.edu
*Required if communication method usage is specific email or preferred.

*Subject: UofL FinAid: FAFSA Received
*Required if communication method usage is specific email or preferred.

Reply to: 
Sender: 
Bounce to: 

Importance
- low
- normal
- high

Sensitivity
- normal
- personal
- private
- company-confidential
Checklists for Missing Information Communications

Selection Parameters | Process Parameters | Email Parameters | Checklist Parameters

Run Control ID: Comm-FAI

Checklist Item Selection

- Administrative Function: FINA Financial Aid

Checklist Context

- Checklist Type
- Tracking Group
- Checklist Code

Checklist Type

- Checklist Type: Requirements List

Checklist Item Status

- Item Status: Initiated
- Item Status: Notified
- Item Status: Returned
CommGen & 3C Engine

Assigned Letter Code

Template

Custom Data Source Query

Generated Communication
Assign Date Time: 02/02/2012 11:16:42AM
*Function: FINA
*Institution: University of Louisville
Comm Key:
*Category: FA-FAE
*Context: FA-FAF
*Method: E
*Direction: Outgoing Communication
Letter Code: FAR
FAFSA Received and Loaded
Include Enclosures
Communication ID:
Department:
Create Joint Communications

Communication Date: 02/02/2012
Begin Time: 
End Time: 
Comments: Student sent email indicating that we have received their FAFSA. Email indicated we will
Print Comment

Communication Generation Date: 02/02/2012
Communication Completed: 
Date Activity Completed: 02/02/2012
Unsuccessful Outcome
Language Used: English
Method Used: E-Mail
Process Used: CommGen
Process Instance: 2589434
View Generated Communication
View Generated Communication

- Allows you to view what was actually sent to the recipient
- Template is regenerated each time
  - File is not saved
- Data that were sent are preserved based on effective date
Louie’s Communication Record

- Users can track communications through entire career
- All communications sent via CommGen are available to be retrieved
- As representatives of our institutions, we are better prepared to serve our constituents – like Louie
Tips & Tricks

Lessons Learned
Tips & Tricks – Watch Your File Size

• Try to keep size of RTF to a minimum
  – Less than 800 KB

• If CommGen process repeatedly runs to “No Success”, then work with IT or DBAs to increase “Java Heap Size”
  – Increases the available memory on server to run the process
Tips & Tricks
Pictures, Tables, & Text Boxes

• Use tables to assist in formatting
• Pictures should be placed “In line with text”
• Text Boxes should be avoided
  – Use a table instead and show the borders

Never Start From Scratch

• Develop a “starter template” for both emails and letters so that new communications have the same look to them as older ones
• Consistency across communications
Dear fld_FIRST_NAME,

Financial Aid Office  
University B  

Destination Address: fld_EMAIL_ADDR (fld_E_ADDR_TYPE)
Tips & Tricks – Keeping Track of it All

• Add the “Destination Address” to your email text
  – No way to track what address an email was sent to, but you can view the individual communication record for this information
  – row_PER_EMAIL
    • fld_EMAIL_ADDR
    • fld_E_ADDR_TYPE

• Write a query to review communications sent out
  – Track completed communications
  – Comms with “Missing Critical Data”
  – Use COMMUNICATION Table
### Fields Table

<table>
<thead>
<tr>
<th>Col</th>
<th>Record.FieldName</th>
<th>Format</th>
<th>Ord</th>
<th>XLAT</th>
<th>Agg</th>
<th>Heading Text</th>
<th>Add Criteria</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A.COMMON_ID - ID</td>
<td>Char11</td>
<td>4</td>
<td></td>
<td></td>
<td>ID</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>A.COMM_DTTM - Communication DateTime</td>
<td>DateTm</td>
<td>3</td>
<td></td>
<td></td>
<td>DateTime</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>A.SCC_LETTER_CD - Letter Code</td>
<td>Char3</td>
<td>2</td>
<td></td>
<td></td>
<td>Letter</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>A.COMM_DT - Communication Date</td>
<td>Date</td>
<td>2</td>
<td></td>
<td></td>
<td>Comm Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>A.COMPLETED_COMM - Communication Completed</td>
<td>Char1</td>
<td>1</td>
<td></td>
<td></td>
<td>Comm Cmplt</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>A.UNSUCCESSFUL - Unsuccessful Outcome</td>
<td>Char1</td>
<td>1</td>
<td></td>
<td></td>
<td>Unsuccess</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>A.OUTCOME_REASON - Outcome Reason</td>
<td>Char1</td>
<td>1</td>
<td></td>
<td></td>
<td>Reason</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>A.PROCESS_INSTANCE - Process Instance</td>
<td>Num10.0</td>
<td>1</td>
<td></td>
<td></td>
<td>Instance</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Criteria Table

<table>
<thead>
<tr>
<th>Logical</th>
<th>Expression1</th>
<th>Condition Type</th>
<th>Expression2</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>AND</td>
<td>A.COMM_DTTM - Communication DateTime</td>
<td>equal to</td>
<td>:1</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>AND</td>
<td>A.SCC_LETTER_CD - Letter Code</td>
<td>equal to</td>
<td>:2</td>
<td>Edit</td>
<td></td>
</tr>
</tbody>
</table>
Tips & Tricks – Enclosures (Attachments)

• Enclosures are set up just like any other Report Definition
• Associate it back to the Letter Code as an Enclosure
• Will be attached to an outgoing email as a PDF document
  – Will be given the same name as your Report Definition
Tips & Tricks – Oops!

- Reset Communication if process does not run to success
  - Allows you to rerun process since it removes the scheduled process that gets associated with the communication record
- Delete Communications if needed
  - Uses SCC_3CDEL_BND record for 3C Engine
Tips & Tricks – Customize Through XML Tags

• Further customize your communications by adding in XML tags to create conditional formatting and text
  
  • `<?if:condition?> <?end if?>`
  
  • `<?if@inline:condition?> *** <?end if?>`

• Create in RTF Temple using BI Publisher Add In
• Refer to BI Publisher Users Guide
  – Installed on machine with Design Helper
Tips & Tricks – Customize Through XML Tags

- Highlight block of text and define conditional criteria
- If, Then, Else statements
- Use BI Publisher Helper or write your own
Tips & Tricks
Use Multiple Run Controls

• With the potential for many different communications to be sent out, don’t redo your Run Control each time
• Create a new Run Control for each Letter Code that gets assigned

Mark Your Calendars!

• Better time management
• Schedule and review with query
Collaborate!

- Find others across campus that are using CommGen
- They will be your best resource
Questions?
Additional Sessions at Alliance ‘12

30025: Advanced XML Publisher: Bursting, Flex, Sub-Templates and More!

30365: Communication Generation Advanced Features

30620: The Long and Short of Communication Generation

30733: Practical setup and implemention of XML Templates

30364: Ain't Nothin' But a CommGen
Contact Information

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Student Financial Aid Office
University of Louisville

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This presentation and all Alliance 2012 presentations are available for download from the Conference site at

www.heug.org
www.psugonline.org
www.federalusersnetwork.com

Presentations from previous meetings are also available