Communication Generation Tips and Tricks

1. **Troubleshooting specifics and error messages:**
   a. For a detailed troubleshooting list with error messages, see: **Communication Generation Troubleshooting – Issues and Solutions**

2. **General Troubleshooting Questions and Steps to Try by Page :**
   a. Are *all* **Effective Date** fields set to 01/01/1900? Effective Date fields are in these pages:
      i. **Communication Context**
      ii. **Communication Category**
      iii. **Event Definition**
   b. **Comm Key:**
      i. Are all fields filled in on the **Comm Key** page?
      ii. Has the **Comm Key** page been associated with the User (**User Defaults**)?
   c. Report Definition:
      i. Under **Report Definition**, the **Template** page, is the Channel field populated?
         1. It should be Printer or Email.
         2. If it is left blank, you will receive an error message when you attempt to associated the Report Definition with the Letter Code. (The error message may start with: *"No valid queries found in the first 300 items evaluated. Enter search criteria for better results. (14100,875)*
      ii. Under **Report Definition**, the **Outpu**t page, is the Default checked for PDF for a letter or HTML for an email?
   d. Data Source:
      i. In general, the Max Nbr field on the **Data Source** page should be blank, unless you want to return a specific number of rows for each person.
   e. **Letter Code** and **Data Source** pages:
      i. If the **Admin Function** (Administrative Function) can be applied to Persons and to Organizations, but you only need Persons, uncheck Organization.
   f. **Report Definition** and **Letter Code** (**Standard Letter Table**).
      i. Report Name (**Report Definition**) doesn't show up when **Letter Code** is selected
         1. **Report Definition** is not tied to the Letter Code in the Standard Letter Table
         2. User does not have security to Report Category tied the Report Definition
         3. Try in the **Standard Letters** page, removing and re-entering the Report Name under Template Selection (Define Comm Gen Parameters).
         4. Can't select a **Report Definition** in Standard Letter table
            a. Be sure that the Data Source Type in the Report Definition setup is XMLDoc Object.
   g. 3C Engine (Run 3C Engine):
      i. If **Event ID** (Event Definition) does not show up under Event Selection, check that 3C Group security has been applied for this communication.

h. **Communication Generation:**
   i. If you run the process to success, but there is no View Generated Communication link under Output Settings:
      1. Be sure the date range is appropriate
      2. Be sure the Online Preview box is not checked
   ii. If you see no report name or your report is not in this list, check:
      1. Is the report definition active?
      2. Is there a default template?
      3. Is there a template file uploaded?
      4. Is the template file active?
      5. Is the effdt for the template <= today?
      6. Do you have the right permissions to see the report (check chapter one and see if you have a role which has access to the report category assigned to the report).
      7. Check to make sure that the date range includes at least one student with a communication date (date that the communication was assigned to an individual) that fits in the range.
      8. Check to make sure any variable data queries attached to data source are working when run directly.
      9. After running the process the log says “missing critical data”
         a. Student may not have an address or email address – in which case valid error.
         b. Check your Address Usages on the Process Parameters.
            i. Be sure that if you are sending a letter that the address usage contains physical addresses of some sort.
            ii. If you are sending an email, be sure that the address usage contains an email address of some sort.
            iii. To see the setup of address usages see Setup SACR > Product Related > Campus Community > Establish People Processing > Address Usage Table
            iv. Check to make sure that the name parts and addresses are setup correctly in the Campus Community Installation at Setup SACR > Install > Campus Community Installation – Names/Addresses tab

3. **Template:**
   a. Template File Size
      i. Try to keep size of RTF to a minimum – less than 800 KB
      ii. If CommGen process repeatedly runs to “No Success”, then work with IT to increase “Java Heap Size” - Increases the available memory on server to run the process
   b. Template Pictures, Tables and Text Boxes
      i. Use tables to assist in formatting
      ii. Pictures should be placed “In line with text”
      iii. Text Boxes should be avoided - Use a table instead and show the borders
   c. Template - Never Start from Scratch

        i. Develop a “starter template” for both emails and letters so that new communications have the same look to them as older ones
        ii. Maintain consistency across communications
    d. Keeping Track
        i. Add the “Destination Address” to your email text
            1. No way to track what address an email was sent to, but you can view the individual communication record for this information
            2. row_PER_EMAIL
                a. fld_EMAIL_ADDR
                b. fld_E_ADDR_TYPE
        ii. Write a query to review communications sent out - Use COMMUNICATION Table
            1. Track completed communications
            2. Communications with “Missing Critical Data”

4. **Enclosures/Attachments**
        i. Enclosures are set up just like any other Report Definition
        ii. Associate it back to the Letter Code as an Enclosure
        iii. Will be attached to an outgoing email as a PDF document
        iv. Will be given the same name as your Report Definition
5. **Extreme Measures**
    a. Reset Communication if process does not run to success
        i. Allows you to rerun process since it removes the scheduled process that gets associated with the communication record
        ii. Delete Communications if needed
            1. Uses SCC_3CDEL_BND record for 3C Engine
6. **Customize through XML Tags**
    a. Further customize your communications by adding in XML tags to create conditional formatting and text
        i. <?if:condition?> <?end if?>
        ii. <?if@inline:condition?> *** <?end if?>

    b. Create in RTF Template using BI Publisher Add-In
        i. Refer to BI Publisher Users Guide
        ii. Installed on machine with Design Helper
    c. Highlight block of text and define conditional criteria
    d. If, Then, Else statements
    e. Use BI Publisher Helper or write your own
7. **Use Multiple Run Controls**
    a. With the potential for many different communications to be sent out, don’t redo your Run Control each time
        i. Create a new Run Control for each Letter Code that gets assigned
8. **Mark Your Calendars**

   a. Better time management
   b. Schedule and review with query

9. **Address Usage Table**
   a. Define order of address that Comm Gen will try when generation communication
   b. Email addresses
   c. Mailing addresses
   d. Navigation: Set Up SACR > Product Related > Campus Community > Establish People Processing > Setup > Address Usage Table
10. **Naming Conventions**
    a. For consistency, and ease of use and troubleshooting, use the standard naming conventions found in the detailed documentation.
    b. Each office should begin the names with one distinct letter, for example, “S” for Student Accounts and “G” for GLS.
    c. If there are existing elements that begin with the letters, a warning should appear. In that case, do not overwrite the existing element, but move on to the next logical name for your office.