Student Faculty Information System - PeopleSoft 9.0   Wesleyan University   Communications Map and Steps ver 3.xlsx - CommGenMap Steps

Communication Generation Map

row#	STEPS/MENU NAMES	NAVIGATION	EXAMPLES OF NAMES: Pre-Collect - Student has left		
1	Select ADMINISTRATIVE FUNCTION	Setup SACR > Common Definitions > Administrative Function Table	GEN		
2	*Add a New LETTER CODE*	Campus Community > Communications > Set up Communications > Standard Letter Table CS	S4E		
3	*Add a New CONTEXT* OR Add LTR to Existing CONTEXT	Campus Community > Communications > Set up Communications > Communication Context Table	SPRCLT		
4	*Add a New CATEGORY* OR Add Context to Existing CATEGORY	Campus Community > Communications > Set up Communications > Communication Category Table	SBALNC		
5	*Add a COMMUNICATION SPEED KEY* (3 chars. - same name as Letter Code)	Campus Community > Communications > Set Up Communications > Communication Speed Key Table	S4E		
6	*Add a COMM KEY DESCR* - 30 chars.	Comm Key	Pre-Collect - Student has left		
7	*Add a COMM KEY SHORT DESCR* - 10 chars.	Comm Key	PreCol S4E		
8	*Add Comm Key to USER DEFAULTS*	Set Up SACR > User Defaults > Communication Speed Keys	S4E		
9	Select Letter or Email METHOD	Communication Context	L		
10	Select Incoming or Outgoing DIRECTION	Communication Context	O		
11	Select Comm 3C GROUP(S) for Security - associate with Category	Campus Community > Communications > Set up Communications > Communication 3C Groups	SF		
12	*Create DATA SOURCE QUERY* OR select existing DATA SOURCE QUERY	Reporting Tools > Query > Query Manager	WSF_DS_NET_ACCT_BAL		
13	*Create COMMUNICATION DATA SOURCE* OR use existing if appropriate	Campus Community> Set Up Communications> Communication Data Source	WSF_GENERAL_DATA_SOURCE		
14	(A) *ADD DS QUERY to Comm Data Source,* AND (B) REGISTER and SAVE XML FILE	Campus Community> Set Up Communications> Communication Data Source	WSF_GENERAL_DATA_SOURCE.xml		
15	*CREATE TEMPLATE with Word Add-Ins*	Microsoft Word > Add-Ins > Oracle BI Publisher	S4E_Pre_Collect_StudentLeft.rtf		
16	*Create BI PUBLISHER REPORT DEFINITION*	Main Menu > Reporting Tools > BI Publisher > Report Definition - Definition	S4E		
17	(A) *Add BIP TEMPLATE to REPORT DEFINITION,* AND (B) make changes to other pages as needed	Main Menu > Reporting Tools > BI Publisher > Report Definition - Template	S4E_1		
18	Associate REPORT DEFINITION with LETTER CODE	Campus Community > Communications > Set up Communications > Standard Letter Table CS - Define Comm Gen Parameters	S4E		
19	Select ADMIN FUNCTION BIND RECORD for PS Query	Search in Query Manager > Records for SCC%plus name of Admin Function	SCC_PS_GENP_BND		
20	*Create PS QUERY (if needed)*	Reporting Tools > Query > Query Manager	WSF_PS_GEN_PRECOL_GRAD_BALANCE		
21	*Add a new EVENT ID (Event Definition)*	Campus Community > 3C Engine > Set Up 3C Engine > Event Definition	S4E		
22	*Select EVENT 3C GROUP(S) for Event ID Security*	Campus Community > 3C Engine > Set Up 3C Engine > Event 3C Groups	SF		
23	(A) *Create a New 3C ENGINE RUN CONTROL (Assign communication), (B) Enter Prompts,* AND (C) Run 3C Engine	Campus Community > Communications > Run 3C Engine	S4E		
24	Add a *New COMMUNICATION GENERATION RUN CONTROL* (Generate communications for created records not completed)	Campus Community > Communications > Communication Generation	S4E		
25	POP SELECT PROMPTS (Population Selection, click Edit Prompts)	Campus Community > Communications >Run 3C Engine	Class of; Balance greater than		
26	ADMIN FUNCTION VARIABLES	See Administrative Function	None (GEN)		
27	VERIFY OUTPUT: (A) View Query (B) AND/OR Person Communication	Reporting Tools > Query > Query Manager *and/or* Campus Community > Communications > Person Communications…			