

**Communication Generation Person Steps** (Based on 3C Easy-type chart)

- **Naming Conventions:** To make working with Comm Gen and troubleshooting easier, try to follow consistent naming conventions. See the Communications Map for some suggestions.
- **Order of Steps:** The step numbers are the same as found on the Comm Map, Guide and Checklist. Remember that you do not have to follow this exact sequence. For example, on the 3C Easy chart,\* the order is different. It begins with the creation of the DS and PS Queries. **See Page 5 for the alternative 3C Easy order.**

Step #		In this example, the Admin Function is GEN, the communication is an Email going to Persons only, and the Prompts are for Class Year and Balance Greater than.
1	Select Admin Function	Setup SACR > Common Definitions > Administrative Function Table
2	Add a new Letter Code: <b>Standard Letter Table CS</b>	<p>Campus Community &gt; Communications &gt; Set up Communications &gt; Standard Letter Table CS</p> <p><b>OR</b></p> <p>Set Up SACR &gt; Common Definitions &gt; Communications &gt; Standard Letter Table CS</p> <p>SCC_STN_LTR_TBL</p> <ul style="list-style-type: none"> <li>• Letter Code: XNN (3 characters)</li> <li>• Description (30 characters) and Short Description (10 characters)</li> <li>• Set Letter Code: Can be left blank or used to identify department</li> <li>• Function: GEN (General)</li> <li>• Persons Checkbox: checked</li> <li>• Organization Checkbox: unchecked</li> <li>• Report Letter Type: Softcopy</li> <li>• Letter Printed Data: All or Name/Address Only (in order to store the sample output from the View Generated Communication link)</li> <li>• Joint Communications Allowed Checkbox: unchecked</li> <li>• Include Enclosures: unchecked</li> </ul>
3, 9, 10	Add a New CONTEXT OR Add LTR to Existing CONTEXT, Select Method and Direction: <b>Communication Context Table</b>	<p>Campus Community &gt; Communications &gt; Set up Communications &gt; Communication Context Table</p> <p><b>OR</b></p> <p>Set Up SACR &gt; Common Definitions &gt; Communications &gt; Communication Context Table</p> <p>COMM_CTXT_TBL, COMM_CTX_ME_TBL</p> <ul style="list-style-type: none"> <li>• Academic Institution: WSLYN</li> <li>• Communication Context : XNN (6 characters)</li> <li>• Effective Date (EFFDT): 01/01/1900</li> <li>• Description and Short Description</li> <li>• Method: EMAIL</li> <li>• Direction: OUTGOING</li> <li>• Letter Code</li> </ul>
4	Add a New CATEGORY OR Add Context to Existing CATEGORY: <b>Communication Category Table</b>	<p>Campus Community &gt; Communications &gt; Set up Communications &gt; Communication Category Table</p> <p><b>OR</b></p> <p>Set Up SACR &gt; Common Definitions &gt; Communications &gt; Communication Category Table</p> <p>COMM_CATG_TBL, COMM_CA_CTX_TBL</p> <ul style="list-style-type: none"> <li>• Academic Institution: WSLYN</li> <li>• Communication Category : XNN (6 characters)</li> <li>• Effective Date (EFFDT): 01/01/1900</li> <li>• Description and Short Description</li> <li>• Function: GEN</li> <li>• Communication Context</li> </ul>

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<p><b>5, 6, 7</b></p>	<p>Add a COMMUNICATION SPEED KEY: <i>Communication Speed Key Table</i></p>	<p>Campus Community &gt; Communications &gt; Set up Communications &gt; Communication Speed Key Table <b>OR</b> Set Up SACR &gt; Common Definitions &gt; Communications &gt; Communication Speed Key Table COMM_SPDKEY_TABLE</p> <ul style="list-style-type: none"> <li>• Institution: WSLYN</li> <li>• Function: GEN</li> <li>• Comm Key: XNN (3 characters)</li> <li>• Description and Short Description</li> <li>• Category</li> <li>• Context</li> <li>• Method: E (E-Mail)</li> <li>• Direction: OUT</li> <li>• Letter Code</li> <li>• All Checkboxes: unchecked</li> </ul>
<p><b>8</b></p>	<p>Add Comm Key to USER DEFAULTS: <i>User Defaults – Communication Speed Keys</i></p>	<p>Set Up SACR &gt; User Defaults (“Communication Speed Keys” tab) OPR_COMM_SPDKEY, OPR_SPDKEY_FUNC</p> <ul style="list-style-type: none"> <li>• Add New Row if it doesn’t exist.</li> <li>• Academic Institution: WSLYN</li> <li>• Admin. Function: GEN</li> <li>• No Default Checkbox: unchecked</li> <li>• Add New Row</li> <li>• Comm Key</li> <li>• All Checkboxes: unchecked</li> </ul>
<p><b>11</b></p>	<p>Select Comm 3C GROUP(S) for Security - associate with Category: <i>3C Group Security</i></p>	<p>Campus Community &gt; Communications &gt; Set up Communications &gt; Communication 3C Groups <b>OR</b> Set Up SACR &gt; Common Definitions &gt; Communications &gt; Communication 3C Groups Add / Update 3C Group (Search for Category)</p>
<p><b>12</b></p>	<p>Create DATA SOURCE QUERY OR select existing DATA SOURCE QUERY: <i>Data Source Query</i></p>	<ul style="list-style-type: none"> <li>• Create Data Source Query (for Pop Select Query, see # 20)</li> </ul>
<p><b>13</b></p>	<p>Create COMMUNICATION DATA SOURCE OR use existing if appropriate: <i>Communication Data Source</i></p>	<p>Campus Community &gt; Communications &gt; Set up Communications &gt; Communication Data Source SCC_CG_DTASRC</p> <ul style="list-style-type: none"> <li>• Data Source Map ID: naming convention</li> <li>• Object Owner ID: leave blank or select if available</li> <li>• Data Source Type: XMLDoc Object</li> <li>• Administrative Function: GEN</li> <li>• Checkboxes “Active”, “Person” checked with everything else unchecked.</li> <li>• Complete working with Data Source in Step #14.</li> </ul>
<p><b>14</b></p>	<p>(A) ADD DS QUERY to Comm Data Source, AND (B)</p>	<ul style="list-style-type: none"> <li>• On Data Sources page, IF there are additional fields to be included on the communication, add a link to the Query which will retrieve those fields into the “Custom Extract Data” section.</li> </ul>

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	REGISTER and SAVE XML FILE: <b>Download XML File</b>	<ul style="list-style-type: none"> <li>If your communication only includes fields like the name, address, etc. you should leave the “Custom Extract Data” blank.</li> <li>WHEN DONE, REGISTER DATA SOURCE (This will save the page)</li> <li>Use “View/Download Sample Data File” link to download the .XML file</li> </ul>
15	CREATE TEMPLATE with Word Add-Ins: <b>Microsoft Word</b>	<ul style="list-style-type: none"> <li>In Microsoft Word, load the .XML file (<a href="#">Add-Ins &gt; Data &gt; Load XML Data</a>) and create the .RTF template.</li> <li>Validate Template. Save.</li> </ul>
16, 17	CREATE BI PUBLISHER REPORT DEFINITION: <b>Report Definition</b>  (A) Add BIP TEMPLATE to REPORT DEFINITION, AND (B) make changes to other pages as needed: <b>BIP TEMPLATE</b>	<a href="#">Reporting Tools &gt; BI Publisher &gt; Report Definition</a> PSXPRPTDEFN, PSXPRPTMPL, PSXPRPTOUT, PSXPRPTBURST <ul style="list-style-type: none"> <li>Report Name: XNN</li> <li>Data Source Type: XMLDoc Object</li> <li>Data Source ID: naming convention</li> <li>Report Category ID: as appropriate</li> <li>Object Owner ID: PeopleTools</li> <li>Language Code: English</li> <li>Channel: Email</li> <li>Effective Date: 01/01/1900</li> <li>Status: Active</li> <li>[Upload the .RTF file you created in #15 using the “Upload” button on the “Template” Tab]</li> </ul>
18	Associate REPORT DEFINITION with LETTER CODE: <b>Letter Code</b>	<a href="#">Campus Community &gt; Communications &gt; Set up Communications &gt; Standard Letter Table CS</a> <ul style="list-style-type: none"> <li>Here you connect back to the Report Definition from (#16) using the “Report Name” link</li> <li>Define Comm Gen Parameters Checkbox: checked</li> </ul>
19, 20	Create PS QUERY (if needed): <b>Population Selection Query</b>	<ul style="list-style-type: none"> <li>Create Pop Select Query (for Data Source Query, see #12 )</li> </ul>
21	Add a new EVENT ID: <b>Event Definition</b>	<a href="#">Campus Community &gt; 3C Engine &gt; Set Up 3C Engine &gt; Event Definition</a> EVNT_3CS_TBL <ul style="list-style-type: none"> <li>Academic Institution: WSLYN</li> <li>Event ID: XNN</li> <li>Effective Date (EFFDT): 01/01/1900</li> <li>Status: Active</li> <li>Description and Short Description</li> <li>Admin Function: GEN</li> <li>Communication: Comm Key</li> <li>Comment Category: &lt;LEAVE BLANK&gt;</li> <li>Checklist Code: &lt;LEAVE BLANK&gt;</li> <li>All Checkboxes: unchecked</li> </ul>
22	Select EVENT 3C GROUP(S) for Event ID Security: <b>Security – Event 3C Groups</b>	<a href="#">Campus Community &gt; 3C Engine &gt; Set Up 3C Engine &gt; Event 3C Groups</a> EVNT_GRP_3C_TABLE <ul style="list-style-type: none"> <li>Add 3C Group to the Event ID – shows who has access to Event Definition</li> <li>Academic Institution: WSLYN</li> <li>Event ID: XNN</li> </ul>

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		<ul style="list-style-type: none"> <li>Function: GEN</li> </ul>
23	(A) Create a New 3C ENGINE RUN CONTROL (Assign communication), (B) Enter Prompts, AND (C) Run 3C Engine: <b>Run 3C Engine</b>	<p><a href="#">Campus Community &gt; 3C Engine &gt; Run 3C Engine</a>            PRCSRUNCNTL, RUN_CNTL_3CENGINE            (Add)</p> <ul style="list-style-type: none"> <li>Run Control ID: XNN</li> <li>Population Selection Checkbox: checked</li> <li>All Other Checkboxes: unchecked</li> <li>Process Joint Records Radio Button: No</li> <li>Academic Institution: WSLYN</li> <li>Admin. Function: GEN</li> <li>Event ID: XNN</li> <li>For the Population Selection – Selection Tool, use “PS Query” and select the Query you built for the Population Selection – Selection of who gets the email activity.</li> <li>Edit Prompts: supply prompts to Pop Select Query</li> <li>On the “Manage Duplicate Assignment” tab, uncheck all of the boxes if you’ve handled looking for duplicates in your “Population Selection” Query; otherwise, you can set these parameters to the user’s specification.</li> </ul>
24	Add a New COMMUNICATION GENERATION RUN CONTROL (Generate communications for created records not completed): <b>Communication Generation</b>	<p><a href="#">Campus Community &gt; Communications &gt; Communication Generation</a>            PRCSRUNCNTL, SCC_CG_RUNCTL, SCC_CG_ENC_RCTL, SCC_CG_EML_RCTL, SCC_COMM_CHKCOD, SCC_COMM_CHKLST, SCC_COMM_CHKSTS, SCC_COMM_CHKSTYP, SCC_COMM_ITMSTS, SCC_COMM_TRKGRP, SCC_COMM_TRKSTS            (Add or Use Existing)</p> <ul style="list-style-type: none"> <li>Run Control ID: XNN</li> <li>ID Selection</li> <li>Letter Code</li> <li>Process Parameters</li> <li>Person Communication Usage: complete</li> <li>Communication Process Dates: as appropriate</li> <li>Output Settings</li> <li>Missing Critical Data</li> </ul>
25	POP SELECT PROMPTS (Population Selection, click Edit Prompts)	<p><a href="#">Campus Community &gt; Communications &gt; Run 3C Engine</a></p> <ul style="list-style-type: none"> <li>Class of</li> <li>Balance greater than</li> </ul>
26	ADMIN FUNCTION VARIABLES	<p><a href="#">Setup SACR &gt; Common Definitions &gt; Administrative Function Table</a></p> <ul style="list-style-type: none"> <li>No Admin Function Variables (GEN)</li> </ul>
27	VERIFY OUTPUT: (A) <b>View Query</b> (B) <b>AND/OR Person Communication</b>	<p>(Optional – Use to View what was generated by Run 3C engine)  <a href="#">Campus Community &gt; Communications &gt; Person Communications &gt; Communication Management</a></p> <ul style="list-style-type: none"> <li>Use the Communication Category XNN or other selection criteria as appropriate</li> <li>And/or run PS Query based on Communication Table such as WES_COMMGEN_PERSON_TBL or WES_COMM_TBL_PROMPT_LTR_DATE</li> </ul>

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**Alternative Comm Gen process sequence from 3C Easy chart  
(Steps not used by Departments are excluded)**

<b>3C Easy</b>	<b>Wesleyan</b>	<b>3C Easy Header/Definition</b>
000	12, 19, 20	Query Manager – Create 1 <sup>st</sup> Query. Create 2 <sup>nd</sup> Query only if needed
002	3, 9, 10	Communication Context Table & add Letter Code information
003	4	Communication Category Table
004	11	Communication 3C Groups
006 & Post 006	13, 14	Communication Data Source
Pre 007	15	Microsoft Word – create the .RTF template
007	16, 17	Report Definition
008	2, 18	Standard Letter Table CS – connect back to the Report Definition
Post 008		[return to] Communication Context Table – add Letter Code information
009	5, 6, 7	Communication Speed Key
010	8	User Defaults – add Communication Speed Key
011	21	Event Definition
012	22	Event 3C Groups
013	23	Run 3C Engine
014	27	Communication Management
015	24	Communication Generation