Communication Generation

<div style="background:red;color:white">**Part I – Managing Communications**</div>

This is the first of two documents detailing the procedures to create communications with PeopleSoft. The two documents look at Communication Generation (or CommGen) through these areas:

- **Part I – Managing Communications** (BI Publisher Setup and Communication Setup)
- **Part II – Defining and Assigning Communications** (Comm Data Source, Template, Report Definition, Event Definition, Communication Generation)

Introduction

- **Communications** in PeopleSoft is one of the "3Cs" which also includes **Checklists** and **Comments**.
- Communication management enables you to manage all forms of outgoing and incoming communications between the institution and constituents.
- **Campus Community** provides the foundation of personal information, ID management, and **3Cs** for all of the Campus Solutions applications.

Communication Generation Documentation Resources

- Portions of this document are derived from PeopleBooks as well as Oracle University Guide instructions and other sources.
- Comm Gen and the 3Cs are documented most comprehensively in the PeopleSoft Enterprise Campus Community Fundamentals 9.0 PeopleBook which is available through the Help link at the top of the PeopleSoft page. The PeopleBook you access is determined by which application page you are on when you click the Help link.
- There are a number of documents in the [SFIS Blog](#) including:
    - An Oracle White Paper from March 2010 named [Campus Solutions 9.0 Communication Generation White Paper](#). While this paper is written for technical users, there may be answers to some of your questions.
    - For documentation specific to Wesleyan, as well as a Guide, FAQs, and Tips and Tricks, look under PROCEDURES – WESLEYAN > Communications/Selection/Business Intelligence > [Communication Generation](#).
    - You will also find links to presentations on this topic in the SFIS Blog on the page [PROCEDURES – OVERALL](#), under the Section COMMUNICATION GENERATION (COMM GEN).

Communications 3C Building Blocks

There are seven "building blocks" associated with **Communication Generation**:

Administrative Function	**Which** functional area contains the variable data needed for this message?	° A system-defined code that identifies which functional area the communication is most relevant to. ° Key variable data is associated with each administrative function, which allows each 3C event or item to be traced back to a specific and relevant event in a functional area. ° Variable data is used to extract relevant data for use in generating letters and other communications. ° ***There is not always a single right function, but there are always wrong functions.*** ° *(Note: the Admin Function "GEN" does not have key variable data associated with it. See more detail below.)*
Context	**What** is the overall purpose for a specific message?	° Each message that is communicated. There can be one item, for instance, just a letter as a Context. ° Or there may be multiple Contexts. For example, if you send an invitation and require an RSVP you would have two Contexts (invitation and RSVP). If you send a confirmation, you would then have three Contexts (invitation, RSVP, and confirmation).
Method	**How** is the message being communicated?	° Method used to transmit communications – letter, email.
Direction	**Where** is the message going – incoming or outgoing?	° Direction of the communication, either incoming or outgoing.
Category	**Why** are all the messages that make up this communication taking place?	° A group of one or more messages (Contexts) that is related to a specific purpose.
Date	**When**	° The date when the communication is initiated, sent or received.
ID	**Who** is receiving or sending the message to the university?	° The person or organization to whom the communication is assigned or from whom it is received.

Setting Up Communications Processes

The remainder of this document spells out the various steps involved in setting up Communications. (The second document, Part II, contains the instructions for defining and producing communications.)

Note: These directions describe *outgoing communications without enclosures*, and do not involve joint communications. If additional instructions are needed, they will be part of a separate document. However, there will be some mention here of other types of communications to explain the use of certain fields.

While going through these steps, you should utilize the ***Communication Map***, or a similar tool, to define and identify the multiple elements comprising each communication. The Communication Map also spells out each step in the process. Keep in mind that some of the elements may already have been created.

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Note: The Setup Communication Steps, items 4-7 and 9 above, should be performed in this order as shown in the menu to the right (The **Communication Data Source** page is discussed in the document Part II):
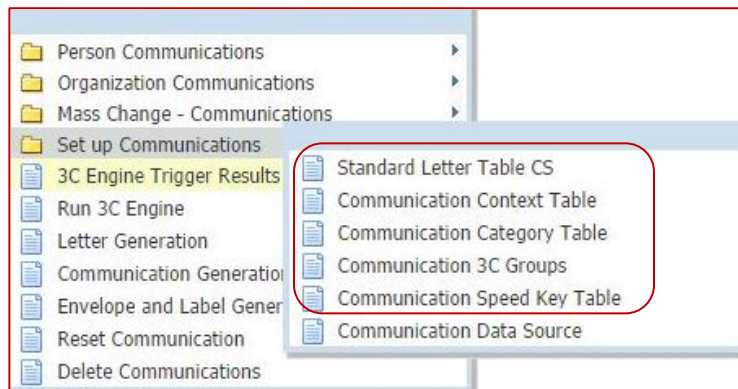
1. **BI Publisher Setup** - Download the BI Publisher Design Helper (formerly XML Publisher).
    a. BI Publisher is the product you will use to add XML coding to your Word template for letters, emails, labels, and envelopes.
    b. Follow instructions within PeopleSoft: *Main Menu> Reporting Tools> XML Publisher> Setup> Design Helper.*
    c. Or download - http://www.oracle.com/technetwork/middleware/bi-publisher/downloads/index.html
    d. You may also need to download Java Runtime Environment (JRE) if it is not already installed on your system - http://java.com/en/download/index.jsp

2. **Define the Communication and Select Criteria**
    a. The first step in setting up is to define the communication and select the criteria.
    b. You need to think about what text should be in the communication.
        i. NOTE: When you get to the step of setting up a Word template, you will need to define the communication as an RTF file. If you do not, you can't use it for BI Publisher and Communication Generation.
        ii. You need to define:
            1. The fixed data (letter text)
            2. The variable data (which variable text fields should be shown in the communication). The variable data will have to be populated through a query (or application class).
    c. Determine the criteria required for the communication.
        i. Use the guidelines in the Introduction regarding the seven building blocks for Communications.
        ii. Create a query that includes your criteria to verify that the population you are looking for is selected and that all fields are appropriate (called a **Data Source Query** or **Custom Extract Data Query**).
    d. In short, you need to target the audience, decide how to send the communication, define the goal.

3. **Determine Administrative Function (Admin Function)**
    a. Navigation: *Main Menu > Setup SACR > Common Definitions > Administrative Function Table*

b. As noted in the Introduction, the **Administrative Function** is identified by the question "***Which*** functional area contains the variable data needed for this message?"

c. Review the list of Admin Functions to determine which is appropriate.

d. Considerations:

    i. What is the Communication about?

    ii. Will it need to be repeated in the future to the same student? If so, how frequently?

    iii. What data needs to be included in the Communication?

e. NOTE: The Administrative Functions are delivered. Do not change!

f. To see a chart displaying details relating to the relationship of each **Administrative Function** and its core records and variable data used for extracting communication data, take a look at Appendix A from the Oracle White Paper – Administrative Functions, Core Records, and Variable Data. It contains these columns:

    i. Administrative Function Codes

    ii. Administrative Functions

    iii. Core Records

    iv. Variable Data

g. **Variable Data:** All **Administrative Functions**, except the **General Administrative Function** (**GEN**), include variable data enabling you to filter the data to extract for a communication. See item (n) below re: **GEN.**

    i. For example, variable data for the STRM function include Academic Career and STRM. An ID might have several Academic Careers (Undergrad, Graduate, GLSP, and so on). With variable data you can specify from which of those careers and which terms you want to extract data for the communication.

h. As you'll observe, the **Admin Function** plays a role in the next few steps.

i. In addition, the **Administrative Function** will determine the **Generic Process Data** fields under **Communication Data Source**, i.e. it drives the fields that are included by default.

j. Creating the Communication Data Source is detailed in **Part II, Generating Communications, Section 1.**

k. Below is the list of **Administrative Functions**:

Administrative Function	Description
ADMA	Admissions Application
ADMP	Admissions Program
AVAK	Advancement Acknowledgements
AVIN	Advancement Initiatives
AVMB	Advancement Member Benefit
AVMS	Advancement Membership
AWRD	Awarding
BDGT	Budget Maintenance
CASN	CAS Notification
EVNT	Event
FINA	Financial Aid
GEN	General
IHC	International Health Coverage
ISIR	ISIR Corrections
LOAN	Loan
NLBP	Internships NLD
NLOW	Educational contracts NLD
PROP	Prospect Program
PROS	Prospect
PSSV	Prospect Self Service
RECR	Recruiters
RSTR	Restricted Aid
SENR	Student Enrollment
SFAC	Student Financials Account
SFBI	Student Financials Billing
SFCO	Student Financials Collections
SFGR	Student Financials Groups
SFIT	Student Financials Item Lines
SFPA	Student Financials Payments
SFPR	Student Financials Promise
SFRC	Student Financials Receipt
SFRF	Student Financials Refund
SFTP	Student Financials Contracts
SPRG	Student Program

l.   If you click on the link to a Function, you'll see a page similar to this. This example is the SFAC – Student Financials Account:

m. **NOTE: The Effective Date is 01/01/1900**. All Administrative Functions have this Effective Date. Use this date wherever an Effective Date is required.

n. If you click on the **Variable Data** button, the following page opens displaying standard variable data associated with that Function, i.e., the checked items. For SFAC, the page looks like this, and Acct Nbr, Acct Term and Business Unit are shown as variable data related to this function:

Administrative Function Field Usage

Variable Key Usage

☐ Acad Career	☐ Collection ID	☐ Loan Type Cd
☐ Acad Plan	☐ Contract Nbr	☐ Mbr Org
☐ Acad Prog	☐ Contract Number (NLD)	☐ Membership Nbr
☑ Acct Nbr	☐ Coverage Number	☐ Member Payment Number
☑ Acct Term	☐ Designation Code	☐ Payment ID
☐ Aid Year	☐ Effective Date	☐ Prog Nbr
☐ Appl Nbr	☐ Event ID	☐ Receipt Number
☐ Appl Seq	☐ Event Mtg	☐ Recognition Type
☐ Audience Code	☐ Gift Nbr	☐ Refund Nbr
☐ Audience Type	☐ Group ID	☐ Restricted Aid ID
☑ Business Unit	☐ Initiative Code	☐ Sequence
☐ Career Nbr	☐ Internal Contract (NLD)	☐ Session Nbr
☐ CAS Number	☐ Invoice ID	☐ Standard Benefit
☐ Cashier's Office	☐ Item Nbr	☐ Term
☐ Checklist DateTime	☐ Item Type	
☐ Class Nbr	☐ Ln Seq Nbr	

Return

o. Using the **GEN Administrative Function**:
   i. As noted, with one exception, all **Admin Functions** have some standard variable data fields associated with them.
   ii. **The one exception is the GEN Function which has no variable data fields**.
   iii. If you click on the Variable Data button for the GEN Function, you will see that there are no keys checked.
   iv. GEN is used for those instances where the use of another Function would be too specific in the fields it contains.

4. Create the Letter Code

a. Access the **Standard Letters Table** page.
b. Navigation: *Campus Community > Communications > Set up Communications > Standard Letter Table CS*

c.   Click Add a New Value.

d.   Enter the desired letter code, using the Naming Conventions (in this example, it is **S4E**)

	Naming Convention for Letter Code
W	• Three characters.
	• The first character represents the office; e.g. "S" for Student Accounts and "G" for GLS.
	• The next two characters can be any combination of letters. For consistency, they should be similar to the patterns as found on the Communications Map Excel file.
	• Before you add a new Letter Code, check to see if that code, or a similar code, already exists.
	• There are numerous letter codes that were used by Admissions before they shifted from PeopleSoft. These begin with a variety of letters.
	• For offices just beginning to use CommGen it would be easiest to find a beginning letter not currently used, and have all your letter codes begin with that letter.

e.   Click Add. The next page will open as follows:

f. Enter the new Letter Code. Click Add.

   i. If you attempt to add a code that already exists, you will see the message: "The value you tried to add already exists. Select it below if you'd like to update it, or specify a new value in the fields above." **Do not update an existing code.**

g. On the Standard Letters page, enter or verify the information below so that the page appears similar to the following:

   i. **Letter Code**
  ii. **Description –** add (up to 30 characters)
 iii. **Short Description –** add (up to 10 characters)
  iv. **Set Letter Code** – This can be left blank. However, this field can be useful in searching for and querying about letters using the department name as shown in the sample. To request a Set Letter Code for your office, contact the PeopleSoft Functional Analyst.
   v. **Function** – in this example, the **General Administrative Function (GEN)** was selected from the drop-down. As noted above, the Admin Function controls the variable data. The Admin Function on the Letter Code must match the Admin Function associated with the Communication Category, which is created later in this process.
  vi. **Applicable to -** Set automatically based on the **Administrative Function**
      1. When you select the **Admin Function**, the system indicates the types of IDs that can receive communications associated with that Function by

selecting the **Person** check box, the **Organization** check box, or both check boxes.

2. If the Function permits communications with Persons *and* Organizations, both check boxes are available for editing.
   a. You can select or clear the check boxes to limit the communications to either Persons only or Organizations only.
   b. In this example, the Persons box as well as the Organization box were checked originally, but the Organization box has been unchecked for this communication.

vii. **Letter Type** – NOTE: Always select Softcopy.
   1. Select the check box for the desired output form for this letter.
   2. Values for this field are delivered with your system as translate values. Do not modify these values in any way.
   3. Values are:
      a. **Hardcopy:** Does not allow the system to extract data or merge into a softcopy template. ***Indicates preprinted items, such as brochures or pamphlets.***
      b. **Softcopy:** Allows the system to extract data and merge into a softcopy template, which you can then print.
         i. In addition, this makes available the **Define Comm Gen Parameters** check box (see Part II).

viii. **Letter Printed Data** – leave the default of **Name/Address Only**.
   1. To store the sample output and make it available from the **View Generated Communication** link on the **Person (or Organization) Management Communication Management** page, you must select either *All* or *Name/Address Only*.
   2. If you select *None*, the system does not store sample output or any data, and the **View Generated Communication** link will not appear.
   3. The **Person Communication Management page** and **View Generated Communication Link** will be discussed in Part II.

ix. **SQC Name** – leave blank

x. **Joint Communications Allowed** – Select this check box to permit this letter to be addressed jointly to two people at the same address, provided that they have a relationship defined in your database that permits joint communications.

xi. **Include Enclosures** - Select this check box to indicate that other letters need to be grouped and sent with this letter. If this box is checked, a scroll area will open with additional choices. The letter codes must be created to use them as enclosures.

xii. **Define Comm Gen Parameters** – Leave unchecked for now.

1. Once this check box is selected, the **Report Name** selection will be limited to reports in which the **Administrative Function** for the **Data Source** is equal to the **Letter Code's Administrative Function**.
2. If checked, a section entitled **Template Selection** will open to enable the linking of a **Report Definition** to the **Letter Code**.
3. Note: Any Letter Code to be used as an enclosure must also include a Report Definition.
4. For information on defining the **Communication Generation Parameters**, review **Part II –Section 15 – Create or Adjust the Letter Code**.

h. Note that the yellow **Save** button does not appear in this screenshot; it is the lower left of the page. Click **Save.**

5. Create the Communication Context

a. As noted in the Introduction, the **Context** is identified by the question "**What** is the overall purpose for a specific message?"

b. **Comm Contexts** are broad groupings that indicate the type of communication and how it was sent or received (example: outgoing Comm Gen emails)

c. Note: Multiple Letter Codes can be assigned to one Context

d. Access the **Communication Context Table** page.

e. Navigation: *Campus Community > Communications > Set up Communications > Communication Context Table*

Communication Context Table

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

| Find an Existing Value | Add a New Value |

▼ Search Criteria

Academic Institution: = ▼ WSLYN
Communication Context: begins with ▼
Description: begins with ▼

☐ Include History ☐ Correct History ☐ Case Sensitive

Search   Clear   Basic Search   📇 Save Search Criteria

Find an Existing Value | Add a New Value

f. Click **Add a New Value** to create the Context.

g. When the above page opens, if the **Academic Institution** field is blank, select **WSLYN**.

h. In the **Communication Context** box, type in the new name using the Naming Conventions:

W	**Naming Convention for Communication Context**
	• 6 characters
	• The first letter represents the office.
	• Examples of one-letter code for an office
	o G=GLS Office
	o S=Student Accounts
	• The remaining 5 characters are used to describe the letters or emails that are similar. For example, this letter is one of a group of Pre-Collect letters for the Student Accounts Office. The Communication Context code name is SPRCLT

i. Click the **Add** button.

j. On the **Communication Context** page, enter or verify the information below so that the page appears similar to the following:

k. Enter or verify the following information:
   i.   **Effective Date** – change to 01/01/1900
   ii. **Status** – leave default of Active
   iii. **Description** – an appropriate, meaningful description for the group of letters falling under this Context (up to 30 characters)
   iv. **Short Description** – an appropriate short description (up to 10 characters)
   v.   **Method** – Letter.
      1. A **Letter Code** can only have one method.
      2. A **Communication Context** can have multiple methods. For example, for the context of Award, you might send a letter and also make a phone call. Or you may have a more than one letter related to one topic plus a follow-up email in the same **Context**.
      3. Methods include letter, phone call, fax, email, and in person.
      4. **Values for this field are delivered with your system as translate values.**
      5. **The *Letter* value is required for generating letters. Do not modify it.**
   vi. **Direction** – Outgoing Communication
   vii. **Letter Code**
      1. The **Letter Code** field is available only when you specify *Outgoing Communication* in the **Direction** field.
      2. Enter the **Letter Code**
l. Click **Save.** The **Description** of the selected **Letter Code** populates the **Description** field to the right of the **Letter Code**.

6. Create the Communication Category and Link Contexts to It

a. As noted in the Introduction, the **Category** is identified by the question "**Why** are all the messages that make up this communication taking place?"

b. Communication Category is where 3C security links in.

    i. **Comm Category** is a broad grouping of **Communication Contexts** that generally indicates why a communication was sent or received and is keyed by Admin Function.

    ii. You can group related communications in a Comm Context, but then grant or deny different access to a subset of that Context by Administrative Function.

c. To create a new Comm Category, access the **Communication Category Table** page.

d. *Navigation:* *Campus Community > Communications > Set up Communications > Communication Category Table*

e. **NOTE:** There may be an existing Communication Category associated with the Office/Administrative Function that you wish to use.

    i. When the page opens, do a search based on the **Naming Conventions** and the Descriptions of the **Categories** or the **Administrative Function**.

    ii. Remember that you can have multiple **Contexts** under one **Category**, so if the **Category** exists, you can simply add the newly created **Context** to the **Category**.

f. *NOTE:* If there is currently no **Communication Category** for the Office and the **Administration Function**, proceed to add the new **Category**. Otherwise, move to Step *g*.

    i. To add a new **Comm Category**, click on Add a New Value.

    ii. When the following page opens, if the **Academic Institution** field is blank, select **WSLYN**.

    iii. In the **Communication Category** box, type in the new name using the Naming Conventions:

W	**Naming Convention for Communication Category**
	• 6 characters
	• First letter to designate the office. Examples:
	o G =GLS Office
	o S =Student Accounts Office
	• Remaining letters to describe a grouping
	• Example: **SBALNC** =Student Accounts Balances. All the letters in this Category have balances.

  g. On the **Communication Categories** page – whether the code is newly created or it already exists, enter or verify the information below so that the page appears similar to the following:

  h. Enter or verify the following information:

    i. **Effective Date** – change to 01/01/1900

    ii. Status – leave as Active

    iii. Description – an appropriate, meaningful description for the group of letters falling under this Category (up to 30 characters)

    iv. **Short Description** – Short Description – an appropriate short description (up to 10 characters)

    v. **Function** – Select the appropriate **Administrative Function.** Note: **This sample communication uses the GEN Function which has no variable data associated**

with it. Otherwise, you would choose the **Function** which will determine the variable data that will be associated with communications in this **Category**.

    vi. **Context** – Select the **Communication Context** recently created.

       1. Note that multiple **Contexts** may be added.

       2. If appropriate, use the Add button to choose an available **Context** from the **Communication Contexts** page.

       3. The system displays the long Description from the **Communication Contexts** page of the context you selected.

    vii. **Click Save.**

i. **Note from PeopleBooks:** Communication categories are assigned to Communication 3C Groups on the Communications 3C Groups page for the purpose of limiting access to the communications associated with those categories. Therefore, make your communication categories specific so that you have more flexibility to determine which users have access to which communications.

j. **Warning from PeopleBooks:** All contexts from the Communication Context page are available, regardless of whether they include a letter code associated with the same function as the communication category. For example, if you select a context that has a letter code associated with the ADMA function and a category associated with the PROP function, the letter code will not be available as a valid choice when you assign the communication on the Communication Management page.

7. Search for and Associate the Communication 3C Group

a. Navigation: ***Main Menu > Campus Community > Communications > Set up Communications > Communication 3C Groups***

b. Communication 3C Groups grant user groups ***inquiry*** or ***update*** security access to the categories of communications in your database.

c. To create **Communication 3C Groups**, objects in a **Category** are associated with one or **more 3C Update/Inquiry Groups**.

d. NOTE: In most instances, the **Communication 3C Group** already exists.

e. Besides controlling a user's update or inquiry access, **Communication 3C Group** security also determines which groups are automatically enabled for any summary pages controlled by these Update/Inquiry groups.

f. **3C Update/Inquiry Groups** are grouped under **Communication Categories** such as SBALNC or SFGEN.

g. NOTE: One or more 3C Inquiry/Update groups can be attached.

h. User Security: As part of User Security, a **3C Update/Inquiry Group** is associated with the User ID and assigned Update or Inquiry Access. See the next section for an overview of Communication Security.

8. *<u>Communication Security Overview</u>* – *While applying security is not part of these general instructions, the following outline may help you in better understanding the overall process.*

   a. **3C Update/Inquiry Group** – *a group of users who have similar needs and interests. Once defined, one or more **3C Update/Inquiry Groups** can be associated with a **Communication Category** to create a **Communication 3C Group**.*

   b. *Security Administrators give users security access based on **3C Update/Inquiry Groups**. It may be appropriate to utilize an existing **3C Update/Inquiry Group**. Otherwise, a new Group is created.*

   c. *Users can access only those communications that are associated with a **Communication Category** to which they have been granted access by way of a **Communication 3C Group**.*

   d. *Examples of **3C Update/Inquiry Groups** include UGAD, GLAD, and SF.*

9. Create the Communication Speed Key (Comm Key or Speed Key)

   a. **Comm Keys (Communication Speed Keys)** enable you to create a shorthand method of specifying common communication data.

   b. With the five above controls in place, you can set up **Comm Keys** to combine these controls with a number of defaults into one shortcut page control:

      i. standard letter codes
      ii. communication methods
      iii. communication directions
      iv. communication contexts
      v. communication categories

   c. A **Communication Speed Key** enables a user to enter data consistently and rapidly. It pulls together required and optional elements into a communication.

      i. **Note: Communication Speed Keys are not required to create communication records. However, they *are* required for using the 3C Engine Event to assign communications, i.e. it is required for batch assignment via 3C Events and Engine update.**

      ii. Using **Communication Speed Keys** for the **3C Engine** is discussed in Part II.

d. Access the **Communication Speed Keys** page. Navigation: *Campus Community > Communications > Set Up Communications > Communication Speed Key Table*
e. When the page opens you will be searching the list of **Administrative Functions** in order to add the new **Comm Key**:

f. If the Academic Institution field is blank, type **WSLYN**.
g. Click on the Search button, and when the list opens, select the appropriate **Administrative Function**. In this example it is the **Administrative Function** of **GEN**.
h. If this Admin Function had no Speed Key connected with it, you add the new code, and a blank page will open. Proceed to populate the fields as indicated.
i. If this **Admin Function** has at least one **Speed Key** associated with it, the page for the first of those **Speed Keys** would appear. In order to add the new **Comm Key**, click on the plus sign in the upper right. A blank page opens. Proceed to populate the fields. When completed, it should appear similar to the following:

j. Enter or verify the following information:

    i. **Comm Key** – Following the Naming Conventions, enter the name for the new **Communications Speed Key** that will represent this set of communication elements.

W	**Naming Convention for Communication Speed Key**
	• Eight characters
	• Use the three-character Letter Code
	• In this example, it is S4E.

    ii. **Description -** same Description as **Letter Code**

    iii. **Short Desc** – same short Description as **Letter Code**

    iv. **Category** – from the dropdown list, select the **Communication Category** to associate with this **Comm Key**.

    v. **Context** - from the dropdown list, select the **Communication Context** to associate with this **Comm Key**.

    vi. **Duration** – This field is not used; leave blank.

    vii. **Method** – Specify the typical method of the communication that you are associating with this **Communication Speed Key**. The **Letter** method is required when generating letters.

    viii. **Direction** – Specify the direction of the communication you are associated with this **Communication Speed Key**. The **Outgoing Communication** direction is required when generating letters.

    ix. **Letter Code** – Once the Direction of **OUT** has been selected, the field **Letter Code** appears. Enter the code from the dropdown for the communication that you are associating with this **Communication Speed Key**.

    x. **Comments** – Enter comments to further describe or identify the communication.

    xi. **Print Comment** – Select this checkbox to include or print the comments on the **Comments** pages in the communication.

    xii. **Activity Completed** – Select this checkbox when data for a communication is typically entered after the activity is completed. (For example, if the

> communication is an incoming phone call or an incoming letter, when you report it
> in the system, the communication is already complete.)

      xiii. **Unsuccessful Outcome** – Select this checkbox to make the status of **Unsuccessful**
available with this Communication Speed Key. (For example, if you were to hold a
telephone fund-raising event, you might want to record each call to track your
success rate. You could create two Communication Speed Keys – one for
successful phone calls and one for unsuccessful phone calls.)

k. Click **Save.**
l. The **Communication Speed Keys** that you want to use must be added to your ID's User
Defaults.

10. Adding Communication Speed Keys to a User (User Defaults)

a. Note: The Communication Speed Key is the only default that a user has to set in order to
use it.
b. To enable a user to use a Communication Speed Key, it must be added in the **User Defaults**
component for that User ID on the **Communication Speed Keys** page.

    i. Overview:

      1. First, the **Administrative Function** must be identified and then the
Communication Speed Key is added within that Function. After the
Communication Speed Key is added, it is available for the user to use when
assigning the communication.

      2. The user can modify the Communication Speed Key and set one
Communication Speed Key per administrative function to use as a default.

      3. The user can override the default Communication Speed Key and select a
different Communication Speed Key (to which they have access) during
data entry.

c. To add Communication Speed Keys that a user would want to use, access the User Default
Communication Speed Keys page for the user.
d. Navigation: *Set Up SACR > User Defaults > Communication Speed Keys*.
e. Add new Administrative Function:

    i. Click on "Find" to see if the Administrative Function is already one of those under
this user's Speed Keys.

      1. If not, there will be a "Search string not found" message. Click OK.

        a. A blank page will open, similar to the following.

        b. Select the Administrative Function from the dropdown.

        c. Click on the Plus Sign in the upper right under Administrative
Function.

      2. If the Admin Function is already one of those under this user's Speed
Keys, click on the Plus Sign in the upper right under Comm Key.

    ii. The page will resemble this:

f. On the Communication Speed Keys page enter or verify the information below so that the bottom of the page appears similar to the following:

g. Enter the information regarding Communication Speed Keys as follows:
   i. **Academic Institution** – if the **Academic Institution** field is blank, select **WSLYN**.
   ii. **Administrative Function** – Enter (select from the dropdown) the administrative function to which the default communication key is assigned (if there is a default communication key).
   iii. **Default Comm Key (display)** – if there is a default communication key, it is displayed here.

    iv. **No Default** - If you do not want to specify a default communication key for an administrative function, either select this check box or do not select a default communication key in the Comm Key (Communication Key) scroll area. The Default Comm Key field remains blank.

    v. **Comm Key** –
1. Select from the dropdown the communication key that you want add.
2. After you enter a value in this field, the **Category**, **Contex**t, **Method** and other Comm Key values appear.

    vi. The following three checkboxes are comparable to those described in more detail under the section **Create the Communication Speed Key (Comm Key)**
1. **Default Comm Key (checkbox) -** Select to set this Comm Key as the default for the Administrative Function.
2. **Print Comment** - Select to have the system set the **Print Comment** flag to **True** by default for communications using this **Comm Key.**
3. **Activity Completed** - Select to have the system set **Activity Completed** flag to **True** by default for communications using this **Comm Key.**
4. **Unsuccessful Outcome** - Select to have the system set the **Unsuccessful Outcome** flag to **True** by default for communications using this **Comm Key.**

h. Click **Save**.
i. In order to add more **Administrative Functions**, click on the plus sign in the **Administrative Function** area.
j. In order to assign another **Communication Speed Key** associated with an **Administrative Function**, click on the plus sign inside the **Comm Key** area, and click the lookup button to see the **Comm Keys** associated with the **Administrative Function** entered.
k. **NOTE regarding changes or corrections:** If you make any changes or corrections to the Speed Keys after you assign them to your user defaults, you will need to add them to your user defaults again. (You will also want to delete the old ones from your user defaults).
l. **NOTE:** Using the communications building blocks, at this point, the Communication could be **created and assigned manually** for an individual, using the **Person Communication** page (or for an Organization using the Organization Communication page). This will be shown in detail in Part II.

The next steps can be found in **Communication Generation, Part II –Defining and Assigning Communications**.