

## Communication Generation

### Part II – Defining and Assigning Communications

This is the second of two documents detailing the procedures to create communications with PeopleSoft. The two documents look at Communications 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

This document covers the **Communication Data Source**, **3C Events** and **Communication Generation**.

#### Communication Data Source - Outline

- The **Communication Data Source page** is based on the Admin Function and displays the Delivered Fields associated with the Function.
- The **Communication Data Source** is the **XML File** that is the main source of the Communication Template (created in Word and defined in Report Definition).
- To provide more fields, a **Data Source Query** is created. It describes the “what” or “from what additional data fields” the process should extract data to merge to the communication.
- With all Admin Functions, one or more queries may be added to gain any additional fields. Except for the GEN Function, this is the method to supply **Core Record Variable Fields**. (Information regarding the GEN Admin Function can be found further on in this document.)
  - When the **Data Source page** is populated, an **XML File** is created that serves as the primary source for the Communication (Word) Template.
  - The elements involved in defining the **Data Source** are:
    - Custom Extract **Data Source Query** or **Queries**
    - **Communication Data Source** (XML File)
    - **Microsoft Word Template**
    - **Report Definition** and **Template** (BI Publisher)
    - **Letter Code** associated with the **Report Definition**

#### 3C Engine Events and the 3C Engine – Outline

- Some characteristics of the **3C Engine**:
  - ***Delivered process that eliminates need to manually batch assign checklist, communications and comments.***

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- A query-based process to determine the population to **whom** you will be sending your Communication – a “**Pop Select Query.**”
- **Note:** The Pop Select Query is an altogether separate query from the other query which is also described in this document - the “**Data Source Query.**”
- The Pop Select (or PS) Query is used to assign new communication records to individuals.
- The Administrative Function’s Bind Record **MUST** be used.
- The **3C Engine** is a rules-based PeopleSoft application engine that you can integrate with functional transactions to **automatically** insert or update communications, comments, and checklists records.
  - The **3C Engine** can thus reduce the amount of manual intervention (or customizations) needed to automate the use of 3Cs throughout the system.
  - The **3C Engine assigns rules known as 3C Engine Events**, typically communications in the form of letters or emails.
    - The **3C Engine Event** can **be any of the 3Cs** to either a person or an organization.
      - An example of a **3C Engine Event** is adding a collections letter to a student’s communication.
    - Use **Administrative Functions** and detail data to define the **3C Engine Events** to identify sets of communication, checklists, and comments for the **3C Engine** to assign.
- To set up the **3C Engine**:
  - You create a **3C Engine Event** that tells the system *what to process* (that is, which Communications, Checklists, and Comments to assign).
  - Then **Security** is set using **3C Groups**, just as security is set for Communications (as well as Checklists and Comments).
  - **3C Groups** are used to group access to **3C Events** and define security.
    - A **3C Event** will not be applied if the user is not in the **3C Event Group**. This limits who can cause **3C Events**.

## Communication Generation - Outline

- The **Communication Generation process** is a procedure that enables you to select specific fields from which to extract critical data for a **Letter Code** assigned to the IDs - individual or organization - for whom you want to generate the communication.
  - The **Communication Generation process** supports Usages (names, address, and salutation), enclosures, joint communications, communication recipients, checklist extract and status update, print communication comment, and so on.
  - To use the **Communication Generation process, you must first assign a communication record for the desired Letter Code to the intended recipients.**
    - You can assign communications to individuals or organizations **manually**, or
    - You can use the **3C Engine** to assign them using the **Population Selection** process.
    - You can also use the **Population Selection process** from within the Communication Generation process to select the IDs to which you want to send the communication.

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- **NOTE these requirements.** The IDs selected are processed only if they have a Communication assigned to them which is:
  - Using the specified Letter Code,
  - Within the Communication Date Range, *and*
  - Is not yet completed.

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## 11. Create Custom Extract Data Query (Communication Data Source Query)

- If you don't need any additional merge data fields to include in your communication other than what the delivered generic data extract contains, then you are ready to create your Data Source and proceed to Report Definition.
- Once the letter data is defined, in order to get variable data required for the communication, you create a **Data Source Query**. Such a query needs a bind variable entered as a Prompt.
  - **NOTE:** If you use the GEN Administrative Function, you will not be using any Variable Data Fields in the **Data Source Query**. However, all the other rules discussed below with regard to Admin Functions still apply.
- Create one or more custom queries; the query will contain **Variable Data Fields** from the **Administrative Function's** related **Core Record**.
  - **NOTE:** The GEN Admin Function does not have a **Core Record**.
- Two warnings from PeopleBooks:
  - You must include at least query prompts that retrieve person ID or organization ID or a combination of the two.

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- You must list each prompt that you create as criteria in the Criteria page of the Query Manager component.
- The **Data Source Queries** will be added to the **Communication Data Source** page under **Custom Extract Data**.
- In order to test the validity of the query output, once the query is created, create a test version, excluding the prompts for variable data.
- The PeopleTools Query tool (Navigation: Reporting Tools > Query > Query Manager) is used to create most Communication Data Sources.
- When naming the Data Source Query, keep in mind that you can use the same query for different Letter Codes, so do not limit the name by the Letter Code. If appropriate, you may want to enter either the Context or Category as the last part of the name. In general, name it as follows.

	<b>Naming Convention for Custom Data Source Queries (30 characters)</b> <ul style="list-style-type: none"><li>• Letter “W”</li><li>• Two letter code for the office</li><li>• Underscore</li><li>• Two letters “DS” for Data Source</li><li>• Underscore</li><li>• Name describing content of query</li><li>• Example: WSF_DS_NET_ACCT_BAL</li></ul>
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- **NOTE:** The Data Source Query defines the “what,” or “from what additional data fields” the process should extract data to merge to the communication.
  - This query should **not** define “who” should receive the communication.
  - That information can be acquired through a Pop Select query described later.
- When using Query in conjunction with RTF template-based files, design the Data Source structure to be as close as possible to the actual document template structure to improve runtime performance.
- **Important:** Create Prompts in the query:
  - The Data Source Query must be based on the **Administrative Function** used in the **Communication Data Source** setup.
  - **About Prompts:** Minimally, the query must include one query prompt to retrieve a Person ID or Organization ID, or a combination of the two.
    1. The query must be prompted on fields that can be populated using the Administrative Function key fields, and no others.
    2. You don’t have to prompt on every key field
    3. The prompts should return the specified fields for just one ID.
  - **Don’t build conditional logic into your custom Data Source queries.** Otherwise you’ll get very strange results in your communications. Build good Pop Select queries instead (later).
  - **Avoid using Expressions as part of a field or criteria,** as the process may abend abnormally. (Note: This warning is from the March 2010 Oracle White Paper—Campus Solutions 9.0 Communication Generation)
  - **IMPORTANT NOTE about Prompts in the Data Source Query**
    1. Based on the **Data Source Context** selected for the **Communication Data Source**, the Query prompt(s) will be validated when the **Register Data Source** button is clicked.
    2. Validation of any given **Data Source Context** will be based on the following:

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3. **Unique Prompt Name – Person ID and Organization ID:** Validate the Person/Organization Context - *Person ID and Organization ID* fields:
  - a. On the **Edit Prompt Properties** page, change the **Unique Prompt Name**. **BIND 1 is replaced as Unique Prompt Name value**
  - b. Change *Person ID* fields (e.g. EMPLID), from BIND1 to PERSON\_ID
  - c. Change *Organization ID* fields (EXT\_ORG\_ID), from BIND1 to COMMON\_ID

Original Prompt Properties – EMPLID	Edited Prompt Properties – EMPLID
<p><b>Edit Prompt Properties</b></p> <p>Field Name: <input type="text" value="EMPLID"/></p> <p>*Heading Type: <input type="text" value="RFT Short"/></p> <p>*Type: <input type="text" value="Character"/></p> <p>*Format: <input type="text" value="Upper"/></p> <p>Length: <input type="text" value="11"/></p> <p>Decimals: <input type="text" value=""/></p> <p>*Edit Type: <input type="text" value="No Table Edit"/></p> <p>Prompt Table: <input type="text" value=""/></p> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/></p>	<p><b>Edit Prompt Properties</b></p> <p>Field Name: <input type="text" value="EMPLID"/></p> <p>*Heading Type: <input type="text" value="RFT Short"/></p> <p>*Type: <input type="text" value="Character"/></p> <p>*Format: <input type="text" value="Upper"/></p> <p>Length: <input type="text" value="11"/></p> <p>Decimals: <input type="text" value=""/></p> <p>*Edit Type: <input type="text" value="No Table Edit"/></p> <p>Prompt Table: <input type="text" value=""/></p> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/></p>

4. **Variable Data Fields:** Validate the Administrative Function Context - *Variable Data Fields* (found in Administrative Function Core Records)
  - a. On the **Edit Prompt Properties** page, change the **Unique Prompt Name** from “BIND1” to the actual name of the field (e.g., ACAD\_CAREER, STRM).
  - b. Below is an example showing how to change the Prompt Properties for the Variable Data Field of ACCOUNT\_TERM (which is associated with the Administrative Function Code of SFAC):

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Original Prompt Properties – Variable Data Field	Edited Prompt Properties – Variable Data Field
<p><b>Edit Prompt Properties</b></p> <p><b>Field Name:</b> ACCOUNT_TERM</p> <p><b>*Heading Type:</b> RFT Short</p> <p><b>*Type:</b> Character</p> <p><b>Heading Text:</b> Acct Term</p> <p><b>*Format:</b> Number Only</p> <p><b>*Unique Prompt Name:</b> BIND1</p> <p>Length: 4 Decimals:</p> <p><b>*Edit Type:</b> Prompt Table      <b>Prompt Table:</b> TERM_VAL_TBL</p> <p style="text-align: center;">OK      Cancel</p>	<p><b>Edit Prompt Properties</b></p> <p><b>Field Name:</b> ACCOUNT_TERM</p> <p><b>*Heading Type:</b> RFT Short</p> <p><b>*Type:</b> Character</p> <p><b>Heading Text:</b> Acct Term</p> <p><b>*Format:</b> Number Only</p> <p><b>*Unique Prompt Name:</b> ACCOUNT_TERM</p> <p>Length: 4 Decimals:</p> <p><b>*Edit Type:</b> No Table Edit      <b>Prompt Table:</b></p> <p style="text-align: center;">OK      Cancel</p>

6. *Keep in mind that with the GEN Admin Function, there will be no Variable Data Fields involved.*

7. **Edit Type:** In each instance, for the **Edit Type**, select **No Table Edit**.

8. **Prompt Table:** Be sure that **Prompt Table** is blank.

- **NOTE:** Without a prompt called PERSON\_ID or ORG\_ID, the query will not be available to a Communication Data Source.
- **Save** and name the query. The query name to be used with the next step is **WSF\_DS\_NET\_ACCT\_BAL**.
  1. This query is based on only one table (record or view): WSF\_NET\_ACT\_BAL.
  2. There is only one Prompt: PERSON\_ID as the Unique Prompt Name, replacing

## 12. Create a Communication Data Source (XML File)

- **The Data Source is an XML file** produced by PeopleSoft that contains *all the data fields* you want to merge into your letter. At this point in the process the XML file will only contain the field names with sample data.
- Open this page to add or update a Communication Data Source – Navigation: **Campus Community > Communications > Set Up Communications > Communication Data Source**
- **Note:** A stock set of standard communication data (name, address, etc.) is included by default. Any additional information you want to add can be included using PeopleSoft Query.
  - You can have multiple simple queries to retrieve additional information, i.e. only pull data related to a single topic.
- The **Data Source Map ID** links the **XML Data Source** to the **Communication Generation** process information.
- Using the **Register Data Source** button on the bottom of the page automatically stores the **Data Source** inside the appropriate PeopleTools tables.

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- **IMPORTANT NOTE:** *The Communication Data Source is different from Data Source under BI Publisher.* For the Communication Generation process to succeed, the Communication Data Source **must** be created from the Communication Data Source page within Campus Community, **not** from within Reporting Tools > BI Publisher.
- **OPENING AN EXISTING DATA SOURCE:** In most instances the **Communication Data Source** will already exist.
  - To search for an existing **Data Source**, in the **Data Source Map ID** box, type in the name, if known.
  - If the Data Source Map ID not known, you can search the entire list or you can type in part of the name, i.e., the **Admin Function**, using “contains” or a wild card (%). For example, to search for a result containing the **Admin Function** named **SFAC**, you could type “SFAC” as follows, and any current **Data Source Map IDs** containing that name will be listed:

Favorites | Main Menu > Campus Community > Communications > Set up Communications > Communication Data Source

### Communication Data Source

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

Data Source Map ID: begins with

Administrative Function: begins with GEN

Description: begins with

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

- Select the Data Source Map ID.
- When you open the page, most fields associated with the **Data Source Map ID** (in this example: **WSF\_GENERAL\_DATA\_SOURCE** – *note that this does not follow the naming conventions discussed below*) will be filled in, including the fields in the sections **Data Source Context** and **Generic Process Data**, similar to the following:

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**Communication Data Source**

\*Data Source Map ID: WSF\_GENERAL\_DATA\_SOURCE  
Description: WSF General Data Source  
Owner ID: Student Financials  
Data Source Type: XMLDoc Object  Active

**Data Source Context**

\*Administrative Function: GEN  Person  Organization

**Generic Process Data**


Sequence	Description	Sample Data Folder Name	Critical Data
1	List of Checklist Items	CHECKLIST_ITEMS	
2	List of Enclosures	ENCLOSURES	
3	Address for a person	PER_ADDRESS	<input type="checkbox"/>
4	List of Person Communication Recipients	PER_COMM_RECIP	
5	Email Address for Person	PER_EMAIL	<input type="checkbox"/>
6	Name for individual address	PER_NAME_ADDR	<input type="checkbox"/>
7	Name for extra use	PER_NAME_EXTRA	<input type="checkbox"/>
8	Name for individual salutation	PER_NAME_SAL	<input type="checkbox"/>
9	Name for joint salutation	PER_NAME_SALJNT	<input type="checkbox"/>

- The **Data Source Context** section provides the **Administrative Function** name. The appropriate boxes, Person and/or Organization are checked.
- The **Generic Process Data** section lists the generic data that the **Communication Generation** process must always extract to accommodate all of the Campus Solutions communication features.
  1. The data varies depending on whether the context is for a person, an organization, or both.
  2. Each of the features is associated with the names of the records into which the extracted data will be placed for the BI Publisher templates.
  3. You can prioritize the order of the records using sequencing, but you cannot add or delete any of them.
  4. Under the **Critical Data** column to the right, you can check the boxes to indicate which are considered critical. Later, when generating letters, you can indicate not to generate if Critical Data is missing.
  5. Since letters and emails have different critical data, set up two CDS's for each administrative function. The setup must indicate what data is considered critical. To send an email, it is critical that the prospect, applicant, or student has an email address; a postal address is critical data for a letter.
- **CREATING A NEW DATA SOURCE:** If a new Data Source is required, these are the instructions.
  - After assuring yourself that the required **Data Source Map ID** does not currently exist, click on **Add a New Value**.

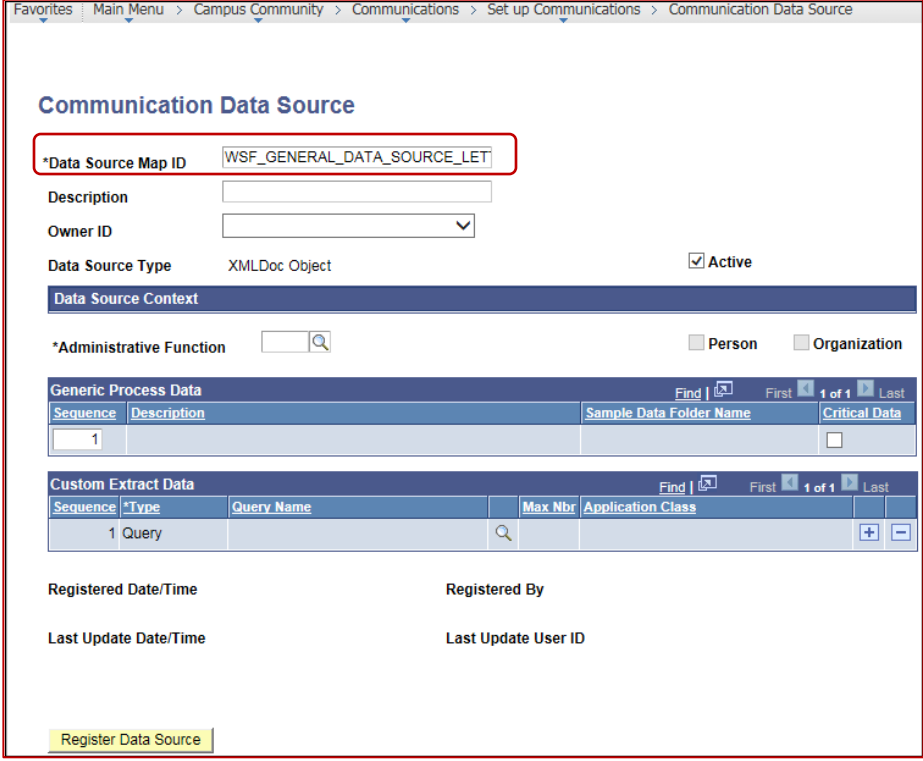


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- Type in the name using the Naming Conventions shown here for the **Data Source Map ID (Communication Data Source)**.
- **NOTE:** There may be IDs for other offices, but not the one you are seeking. This circumstance will require a new ID to be created.

	<b>Naming Convention for Communication Data Source</b>
	• 30 characters
	• Letter “W”
	• Two-letter code for the office
	• Underscore, then the three- or four-character name of the Administrative Function (exception is “GENERAL” instead of “GEN”)
	• Underscore, then “DATA_SOURCE”
• Underscore, then either “LETTER” or “EMAIL”	

- The following page will open with only the first box (**Data Source Map ID**) filled in (with the new name you created). In this example, the name is `WSF_GENERAL_DATA_SOURCE_LETTER`.



**Communication Data Source**

\*Data Source Map ID:

Description:

Owner ID:

Data Source Type: XMLDoc Object  Active

Data Source Context

\*Administrative Function:   Person  Organization

Generic Process Data

Sequence	Description	Sample Data Folder Name	Critical Data
1			<input type="checkbox"/>

Custom Extract Data

Sequence	Type	Query Name	Max Nbr	Application Class
1	Query			

Registered Date/Time: \_\_\_\_\_ Registered By: \_\_\_\_\_

Last Update Date/Time: \_\_\_\_\_ Last Update User ID: \_\_\_\_\_

- Add a meaningful description in the **Description** box.
- The **Owner ID** is optional. If you choose to use it, select the appropriate item from the **Owner ID** dropdown box, such as *Student Financials* or *Student Records*.
- **Data Source Type** will read **XML Doc Object**.
- The **Active** box will be checked. Do not change.

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- Under **Data Source Context**, **\*Administrative Function**, click on the magnifying glass and select the appropriate item.
  1. The **Administrative Function** drives the fields that are included by default (Generic Process Data).
  2. Once you have selected the **Administrative Function**, the section headed **Generic Process Data** will be populated with information related to that Function.
- The **Person** and/or **Organization** boxes are checked depending upon the **Administrative Function** selected.
  1. Note that when both boxes are checked, there are 12 rows under Generic Process Data.
  2. When just the Person box is checked, there are nine rows.
  3. And when just the Organization box is checked, there are five rows.
  4. You can select or deselect either one of them. In this example, the Organization box is unchecked.
- The **Communication Data Source** page will now be similar to this:

**Communication Data Source**

\*Data Source Map ID: WSF\_GENERAL\_DATA\_SOURCE\_LET  
Description: WSF General Data Source Letter  
Owner ID: [Dropdown]  
Data Source Type: XMLDoc Object  Active

**Data Source Context**

\*Administrative Function: GEN [Magnifying Glass] General  Person  Organization

**Generic Process Data**

Sequence	Description	Sample Data Folder Name	Critical Data
1	List of Checklist Items	CHECKLIST_ITEMS	
2	List of Enclosures	ENCLOSURES	
3	Address for a person	PER_ADDRESS	<input type="checkbox"/>
4	List of Person Communication Recipients	PER_COMM_RECIP	
5	Email Address for Person	PER_EMAIL	<input type="checkbox"/>
6	Name for individual address	PER_NAME_ADDR	<input type="checkbox"/>
7	Name for extra use	PER_NAME_EXTRA	<input type="checkbox"/>
8	Name for individual salutation	PER_NAME_SAL	<input type="checkbox"/>
9	Name for joint salutation	PER_NAME_SALJNT	<input type="checkbox"/>

**Custom Extract Data**

Sequence	Type	Query Name	Max Nbr	Application Class
1	Query	[Text Box]	[Text Box]	[Text Box]

Registered Date/Time: [Text Box] Registered By: [Text Box]  
Last Update Date/Time: [Text Box] Last Update User ID: [Text Box]

[Register Data Source](#)

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- **Critical Data:** As mentioned above, under the **Critical Data** column to the right, you can check the boxes to indicate which are considered critical to the creation of the output for individual or organization recipients.
  1. At a later step in the process, on the Communication Generation page, administrative users can specify what to do if Critical Data are missing:
    - a. Either to process the communication without the data, or
    - b. Not to process the communication for IDs that are missing the data.
  2. **Note** that Checklist Items, Enclosures, and Person Communication Recipients cannot be marked as Critical Data.

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- **Custom Extract Data: Add Custom Extract Data, i.e. the Data Source Query**

- Whether updating an existing ID or creating a new one, using the **Query Name** Search/Lookup drop down box, include one or more custom Data Source Queries to include additional data to your communications as described above.
- When using the Search/Lookup for the **Query Name**, logic evaluates the settings in the **Data Source Context section** (which comes from the **Administrative Function**) based on:

1. Whether Person and/or the Organization is associated with the Function.

The screenshot shows two screens from the PeopleSoft system. The top screen is titled "Data Source Context" and shows the "Administrative Function" dropdown set to "GEN" (General). Below this is a table of "Generic Process Data" with columns for Sequence, Description, Sample Data Folder Name, and Critical Data. The bottom screen is titled "Custom Extract Data" and shows a table with columns for Sequence, Type, Query Name, Max Nbr, and Application Class. The "Query Name" dropdown is highlighted with a red box, and an arrow points to it from the "Data Source Context" section above.

Sequence	Description	Sample Data Folder Name	Critical Data
1	List of Checklist Items	CHECKLIST_ITEMS	
2	List of Enclosures	ENCLOSURES	
3	Address for a person	PER_ADDRESS	<input type="checkbox"/>
4	List of Person Communication Recipients	PER_COMM_RECIP	
5	Email Address for Person	PER_EMAIL	<input type="checkbox"/>
6	Name for individual address	PER_NAME_ADDR	<input type="checkbox"/>
7	Name for extra use	PER_NAME_EXTRA	<input type="checkbox"/>
8	Name for individual salutation	PER_NAME_SAL	<input type="checkbox"/>
9	Name for joint salutation	PER_NAME_SALJNT	<input type="checkbox"/>

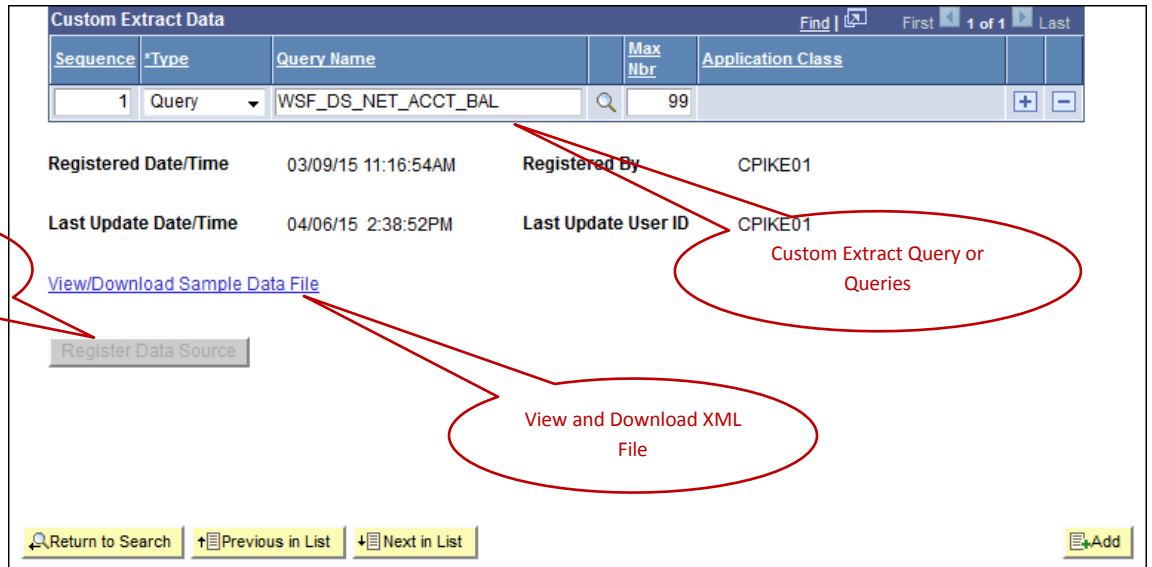
Sequence	Type	Query Name	Max Nbr	Application Class
1	Query	WSF_DS_NET_ACCT_BAL	99	

2. In addition, the system evaluates which queries contain the **Record** that contains the **Variable Data** fields from the **Administrative Function** indicated on the page, and restricts the return of those queries.
3. The **Max Nbr**, or maximum number, is specific to queries only. The number can be used to restrict the number of rows selected. **In general, leave the field blank or you can set it to 99.** See below for more information.

- As discussed above, if a query is used, you **MUST** include prompts for the fields needed for the record that is being joined via the Communication record, including the Variable Data. For instance, you will always be passing Emplid.
  - a. **NOTE:** As alluded to above, the Unique Prompt Name field in the Data Source Query must be the name of the Variable Data field, e.g. EMPLID becomes PERSON\_ID.

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- **NOTE:** A bind record is not needed here. That will be discussed later in relation to Pop Select Queries.
- **Register the Data Source:** Once the **Custom Extract Data** query has been added, click on the **Register Data Source** button at the bottom of the page.
  - The system evaluates each query when you register the Communication Data Source and registers only the queries that it validates can be successfully executed by the Communication Generation process.
  - The system compares the setup of the query prompts with the information in the **Data Source Context** of the Communication Data Source, i.e. the Administrative Function and the Person/and or Organizations.
  - **NOTE:** If the expected query does not appear as a choice, review the elements of the Data Source Query to be sure that it meets all the needed conditions as enumerated above.
  - When you Register the Data Source, the button text will be grayed out, and the audit information fields (i.e. Registered Date/Time, etc.) will be populated by the system.
  - The bottom of the page will now resemble this:



- **View and Download the Sample XML Data File**
  1. Next, in order to view and download the XML file, click on the **View/Download Sample Data File** link. The entire XML file will display.
  2. The output from the Data Source Query is appended at the end of the generated sample data and is ready for use in a BI Publisher template.
  3. The beginning of the XML file will resemble this:

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```
This XML file does not appear to have any style information associated with it. The document tree is shown below.

--<rs_SCC.CG.HDR.VW numrows="1" rowsetname="SCC.CG.HDR.VW" xsi:noNamespaceSchemaLocation="">
  --<row_SCC.CG.HDR.VW rownumber="1">
    <fld_COMMON_ID>sample data</fld_COMMON_ID>
    <fld_SEQ_3C>0</fld_SEQ_3C>
    <fld.CG.SEQ>0</fld.CG.SEQ>
    <fld_SCC_LETTER_CD>sam</fld_SCC_LETTER_CD>
    <fld.CG.SORT_ORDER>0</fld.CG.SORT_ORDER>
    <fld_TEMPLDEFN_ID>sample data</fld_TEMPLDEFN_ID>
    <fld_LANGUAGE_CD>sam</fld_LANGUAGE_CD>
    <fld_SA_ID_TYPE>s</fld_SA_ID_TYPE>
    <fld_VAR_DATA_SEQ>0</fld_VAR_DATA_SEQ>
    <fld_INSTITUTION>sampl</fld_INSTITUTION>
    <fld_EMPLID_RELATED>sample data</fld_EMPLID_RELATED>
    <fld_JOINT_COMM>s</fld_JOINT_COMM>
    <fld_INCLUDE_ENCL>s</fld_INCLUDE_ENCL>
    <fld_ENCL_SEQ_NUM>0</fld_ENCL_SEQ_NUM>
    <fld_RECIPIENT_COMM>s</fld_RECIPIENT_COMM>
    <fld_RELATIONSHIP_NBR>0</fld_RELATIONSHIP_NBR>
    <fld_ORG_CONTACT>0</fld_ORG_CONTACT>
    <fld_ORG_DEPARTMENT>0</fld_ORG_DEPARTMENT>
    <fld_ORG_LOCATION>0</fld_ORG_LOCATION>
    <fld_COMM_DTTM>2015-04-06T14:38:52-04:00</fld_COMM_DTTM>
    <fld_COMM_DT>2015-04-06</fld_COMM_DT>
    <fld_LETTER_PRINTED_DT>2015-04-06</fld_LETTER_PRINTED_DT>
    <fld_COMMENT_PRINT_FLAG>s</fld_COMMENT_PRINT_FLAG>
    <fld_PROCESS_INSTANCE>0</fld_PROCESS_INSTANCE>
    <fld_COMM_COMMENTS>sample data</fld_COMM_COMMENTS>
  --<rs_CHECKLIST_ITEMS numrows="1" rowsetname="CHECKLIST_ITEMS">
    --<row_CHECKLIST_ITEMS rownumber="1">
      <fld_COMMON_ID>sample data</fld_COMMON_ID>
      <fld_SEQ_3C>0</fld_SEQ_3C>
    --</row_CHECKLIST_ITEMS>
  --</rs_CHECKLIST_ITEMS>
--</rs_SCC.CG.HDR.VW>
```

#### 4. The end of the XML file will resemble this:

```
--<SCCquery_WSF_DS.NET.ACCT_BAL numrows="1" queryname="WSF_DS.NET.ACCT_BAL">
  --<row_WSF_DS.NET.ACCT_BAL rownumber="1">
    <BUSINESS_UNIT>BUSIN</BUSINESS_UNIT>
    <EMPLID>EMPLID samp</EMPLID>
    <ACCOUNT_BALANCE>-49713283908997.28</ACCOUNT_BALANCE>
  --</row_WSF_DS.NET.ACCT_BAL>
--</SCCquery_WSF_DS.NET.ACCT_BAL>
</row_SCC.CG.HDR.VW>
</rs_SCC.CG.HDR.VW>
```

- **Save the XML file** by right-clicking on the file and selecting “Save Page As.” Save it to a location that you can access when creating your Word template.
  1. The XML file will be needed to load into the Word template using the delivered Design Helper tool during a later step.
  2. The file contains all the fields that the **Communication Generation** process will extract, which can be included as variables in a Word template.
- **IMPORTANT NOTE about reregistering:** When a change is made to the **Communication Data Source**, including any update to the query (or queries) or application class, the system re-activates the **Register Data Source** button.
  1. The button must be clicked again to re-register the **Data Source**.
  2. The **Data Source** must be registered again for the system to accept and use the changes.

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3. Note that after you have clicked on the button, the **Last Update** information is refreshed.
- **Communication Data Source page with multiple queries:** The following is an example of a different Communication Data Source page that has three data source queries associated with it under **Custom Extract Data**. The fields in this section are populated as follows:
    1. **\*Type:** Query.
    2. **Query Name:** Three queries that were selected from the dropdown.
    3. **Max Nbr:** The maximum rows of data for the query to extract for one emplid.
      - a. **NOTE:** To extract all the possible values for an ID, leave the Max Nbr field blank or set to 99. For example, if your query includes the ACAD\_CAREER field and an ID has an application for 5 different academic careers, when the field is blank the query will extract 5 of the values. If you want to extract only 2 values, set the maximum number to 2.

**Communication Data Source**

\*Data Source Map ID: WAD\_VAR\_PROP\_DS  
 Description: Variable Prospect Data Source  
 Owner ID: Campus Community  
 Data Source Type: XMLDoc Object  Active

**Data Source Context**

\*Administrative Function: PROP Prospect Program  Person  Organization

Sequence	Description	Sample Data Folder Name	Critical Data
1	List of Checklist Items	CHECKLIST_ITEMS	
2	List of Enclosures	ENCLOSURES	
3	Address for a person	PER_ADDRESS	<input type="checkbox"/>
4	List of Person Communication Recipients	PER_COMM_RECIP	
5	Email Address for Person	PER_EMAIL	<input type="checkbox"/>
6	Name for individual address	PER_NAME_ADDR	<input checked="" type="checkbox"/>
7	Name for extra use	PER_NAME_EXTRA	<input type="checkbox"/>
8	Name for individual salutation	PER_NAME_SAL	<input type="checkbox"/>
9	Name for joint salutation	PER_NAME_SALJNT	<input type="checkbox"/>

Sequence	*Type	Query Name	Max Nbr	Application Class
1	Query	WADDS_VAR_CITIZENSHIP	99	
2	Query	WADDS_VAR_ETHNICITY	99	
3	Query	WADDS_VAR_PHONE	1	

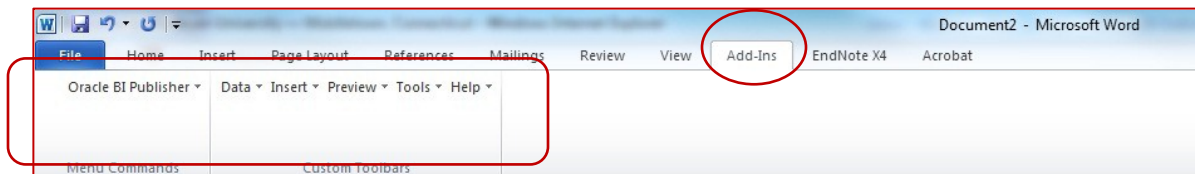
Registered Date/Time: 12/01/11 12:00:35PM Registered By: HBARNES  
 Last Update Date/Time: 12/01/11 12:00:35PM Last Update User ID: HBARNES

[View/Download Sample Data File](#)

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## 13. **Create a Template in Microsoft Word**

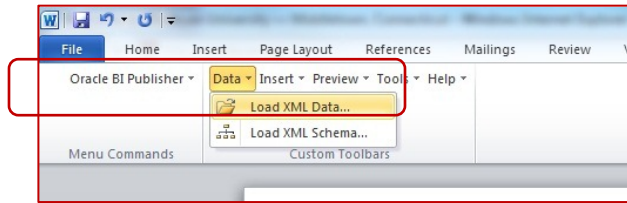
- **BI Publisher Design Helper:** In order to create a template in Microsoft Word, you will need to download and install BI Publisher Design Helper. If you have a version of Microsoft Word later than 2010, there are specific instructions to follow to install the product. See document **XXXXXXXX** for details.
  - BI Publisher is the product you will use to add XML coding to your Word template for letters, emails, labels, and envelopes.
  - Follow instructions within PeopleSoft: **Main Menu> Reporting Tools> XML Publisher> Setup> Design Helper.**
    1. Or download - <http://www.oracle.com/technetwork/middleware/bi-publisher/downloads/index.html>
  - You may also need to download Java Runtime Environment (JRE) if it is not already installed on your system –
    1. See below under POSSIBLE PROBLEM WITH FIRST TEMPLATE CREATION
    2. And look at <http://java.com/en/download/index.jsp>
- **Creating a Template in Word:** These instructions are for creating a template in Word from scratch.
  - However, it is likely that you have existing letters that you will want to utilize. In that case, adapt these directions as needed.
  - **NOTE:** If you have a letter that already has data fields, do not overwrite those fields; rather, copy the text into a new letter.
  - BI Publisher is a standalone Java-based reporting technology that provides users with the ability to design and create document templates with common desktop applications such as Microsoft Word (and Adobe Acrobat). Below are general instructions on the creation of templates using Microsoft Word.
  - The BI Publisher Word Plug-in, or Template Builder, is a wizard extension of Microsoft Word that simplifies the creation of RTF templates.
  - Template Builder demos and samples, which are loaded during the installation of Template Builder can be found in the following location on a user's hard drive:
    1. C:\Program Files\Oracle\BI Publisher\BI Publisher Desktop\demos
    2. C:\Program Files\Oracle\BI Publisher\BI Publisher Desktop\samples\RTF templates
  - Once the **Sample Data** (XML file) has been saved, open Word (Tip: Put in a few blank lines at the top of the page).
  - Select **Add-Ins** from the menu. The screen will appear as follows with the choices applicable to Add-Ins:





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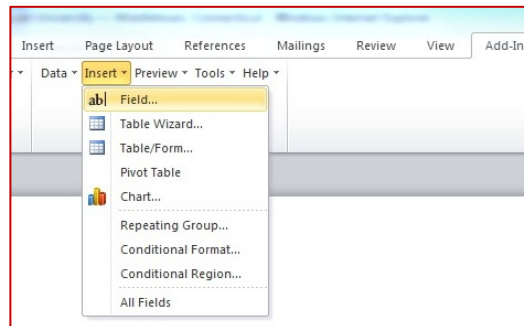
- Load the sample XML data by navigating to **Data > Load XML Data**.



- A window will open. Navigate to the XML file you saved (in this example, **WSF\_GENERAL\_DATA\_SOURCE**).
- When the following message appears, indicating the data was successfully loaded, click OK.



- After entering the text of the communication, move the cursor to where you want the first variable field placed.
- Add the variable fields by clicking on **Insert > Field**.

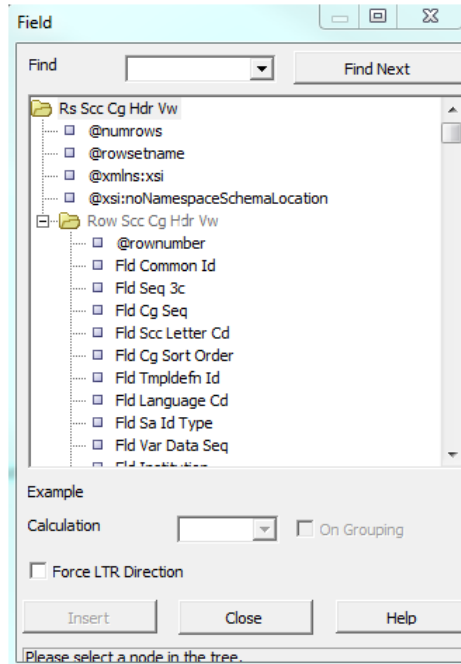


- The list of fields appears:

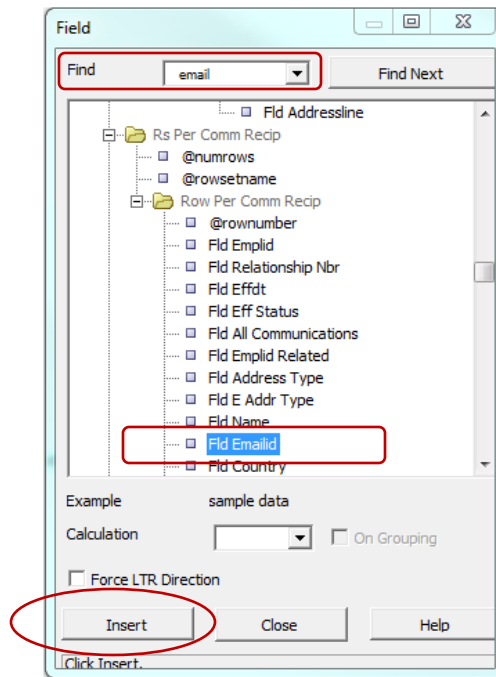
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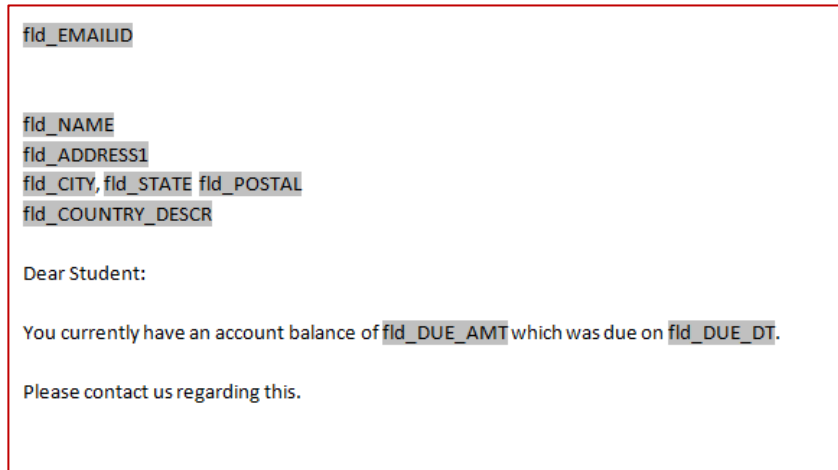


- Default fields begin with “Fld” such as “Fld Emplid,” “Fld First Name” and “Fld Emailid.”
- If you cannot locate the field, use the Find box at the top. When you have the field selected, click on the Insert button.

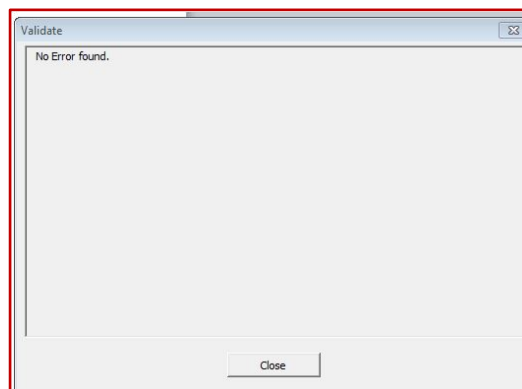


- Continue in the same manner until all the fields have been entered.

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- **Conditions:** Conditions on fields can be set for field. (NOTE: There are other documents in the SFIS Blog illustrations of using conditions.)
- **Formatting:** Review the [Oracle White Paper](#) for details on these items:
  - Dates can be formatted in Template Builder.
  - Word can create an executable hyperlink using a Hyperlink field.
  - Inserting images.
- Recurring data fields, for example, a list of items for a student, can be added using **Insert > Table Wizard**.
  - Tables can also be inserted for non-recurring data using the Wizard.
- **Validate the template** using **Tools > Validate Template**.
  - When the message “No Error found” appears, click the Close button.

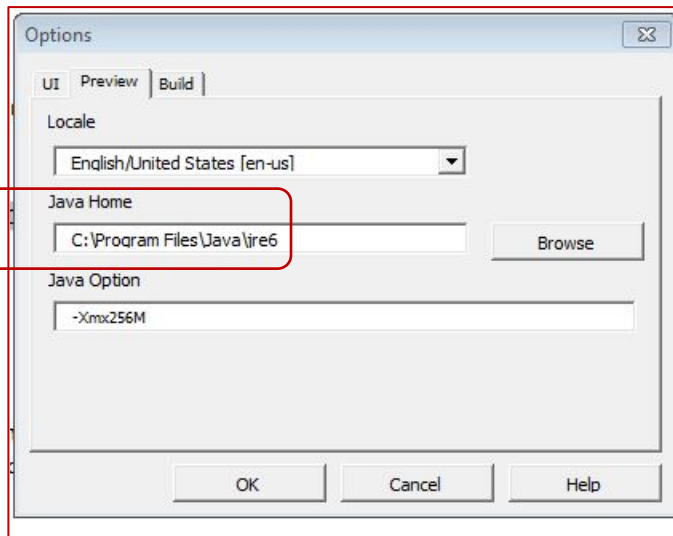


- **POSSIBLE PROBLEM WITH FIRST TEMPLATE CREATION: Java and Error No: 53:** The first time you create a template you may receive the following error message when you validate the template. If so, you will need to upgrade your version of Java as shown below. Once you do so, you should not receive the message again.

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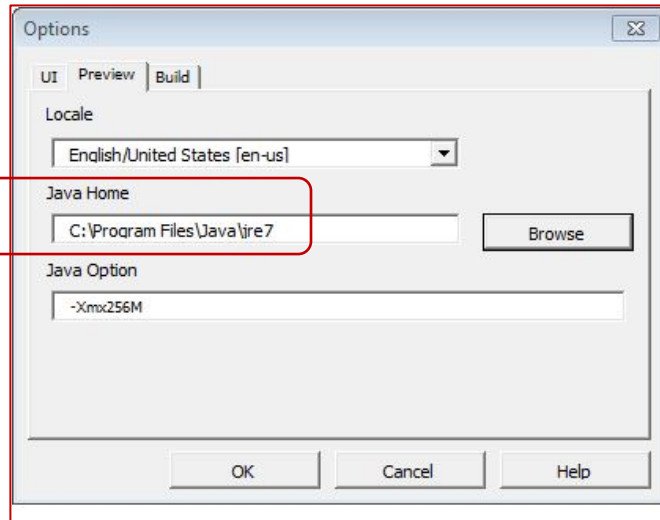


- Navigate to **Tools > Options > Preview** and observe the contents of the field Java Home.

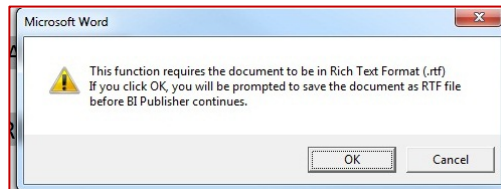


- If it reads **C:\Program Files\Java\jre6** change it to **C:\Program Files\Java\jre7**

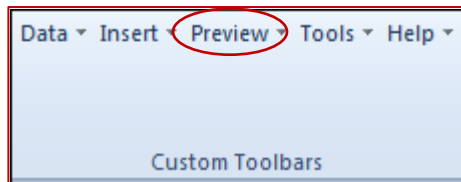
# Wesleyan University Student/Faculty Information System



- Click OK.
- **Validate the template** using **Tools > Validate Template**. You should see the message “No Error found.”
- **Save** the template as Rich Text Format (RTF). If you do not, you will see the following message.



- To review the overall formatting of the letter and the placement of the variable fields, click on **Preview**. Select **RTF**.



- The variable fields will resemble this:

# Wesleyan University Student/Faculty Information System

March 23, 2015


sample data  
sample data  
sample data

sample data sample data  
sample data  
sample data  
sample data, sample SAMPLEDATA

Dear sample data:

I write as a reminder that you still have an outstanding balance of \$-21947835092592.27 due Wesleyan. To review the details of your account please log into your Student Portfolio from [www.wesleyan.edu](http://www.wesleyan.edu) and select Student Account Center.

- When the letter is completed, click OK and save the template as RTF. For this example, the template letter was named **S4E\_Pre\_Collect\_StudentLeft.rtf**. The name is derived from the Letter Code and an abbreviated description. Note that the last part of the template name (**Pre\_Collect\_StudentLeft**) is an abridged version of the Long Description of the Comm Key. Below is a suggested naming convention:

	<b>Naming Conventions for the Word Template file</b>
	<ul style="list-style-type: none"><li>• First three fields: The Letter Code</li><li>• Underscore, then the name of the Report Definition.</li><li>• Example: <i>S4E_Pre_Collect_StudentLeft.rtf</i></li></ul>

14. **Create or Update a Report Definition** – The Report Definition is the area where you associate the Communication Data Source with the Word template. It is one of the elements in BI Publisher.

- Access the Report Definition page. Navigation: **Main Menu > Reporting Tools > BI Publisher > Report Definition**.
  - To update an existing Report Definition, click on Search and select the Report Name.
  - If the Report does not yet exist, click Add a New Value.
  - **Report Name:** Use the Naming Conventions. **The Report Name should be given the same name as the Letter Code.** In this example, the Report Name is **S4E**.
  - **Data Source Type:** Change to *XMLDoc Object*
  - **Data Source ID:** Select the correct Data Source. In this example, the Data Source is **WSF\_GENERAL\_DATA\_SOURCE**.

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- The Definition page opens. Under **Report Properties**, add:
  - **Report Description** – use the Long Description from the Comm Key.
  - **Report Status** – Make Active. The Report Status must be Active before associating the Report Definition with the Letter Code. If the status is not Active, the process cannot detect the Report or the Data Source and Templates associated with it.
  - **Report Category ID** is a pre-defined security level for reporting. Select the appropriate level.
  - **Object Owner ID** – PeopleTools.
  - **Template Type** – leave as RTF. Once the Report Definition is saved, the Template Type cannot be changed.
- The **Definition** page now appears as follows:

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- **Associating a Template:** Click on the **Template** tab.
- **Verify or add as follows:**
  - **Template ID** – Fills in with the name of the **Report** plus an underscore and “1” (or another digit if there is more than one template. You can have multiple templates defined under a single Report Definition).
  - **Default Template** – checked
  - **Description** – Optional, but it’s good practice to use the same name as the Report
  - **Language Code** – English
  - **Channel** – either Email or Printer (for “Letter” you would use Printer) – **MUST be populated.**
  - **Effective Date** – may be changed to an earlier date. Helpful tip: choose the day before, in case you need to modify your template on the same day after producing ‘live’ communications.
- **Status** – change to Active.
  1. The Report Definition must have a report status of Active, and each template that you want to use must have a status of Active. The Communication Generation process ignores reports and templates with any other status.

The screenshot shows the 'Template' configuration page in PeopleSoft. The breadcrumb trail is 'Favorites | Main Menu > Reporting Tools > BI Publisher > Report Definition'. The 'Report Name' is 'S4E'. The 'Template' section includes fields for 'Template ID' (S4E\_1), 'Description' (S4E\_Pre\_Collect\_StudentLeft), '\*Language Code' (English), and 'Channel' (Printer). The 'Default Template' checkbox is checked. The 'Template Files' section shows 'Effective Date' (03/09/2015), '\*Status' (Active), and 'Template File' (S4E\_Pre\_Collect\_StudentLeft.rtf). There are buttons for 'Upload', 'Preview', and 'Use Alt. XML'. At the bottom, there are navigation buttons: 'Return to Search', 'Previous in List', 'Next in List', 'Add', 'Update/Display', 'Include History', 'Correct History', and a 'Save' button.

- Once those fields are populated, you can **Upload** the Word Template – Click on the **Upload** button and browse for and upload the appropriate template file.

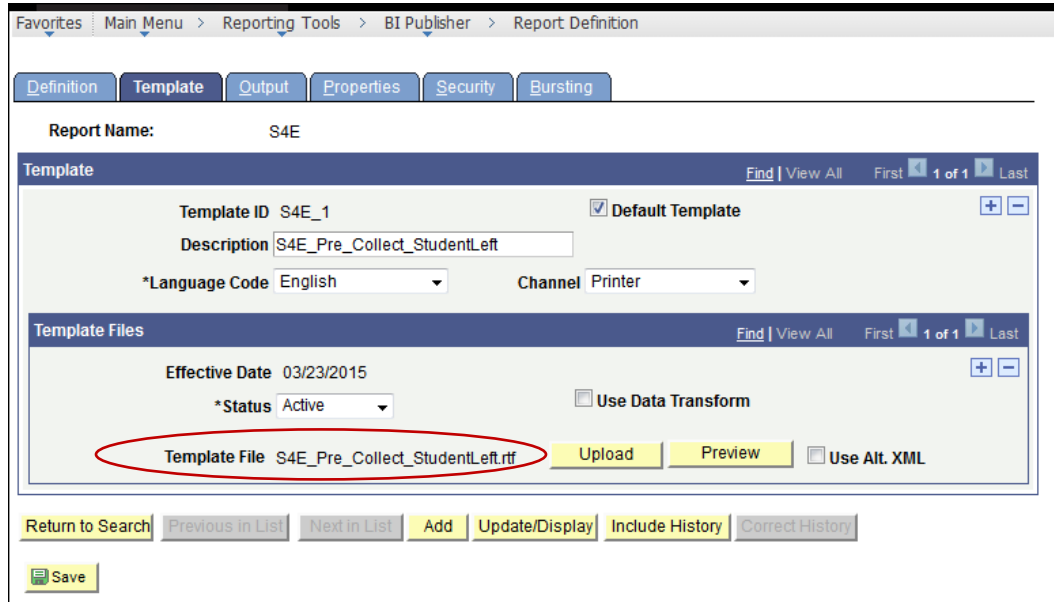


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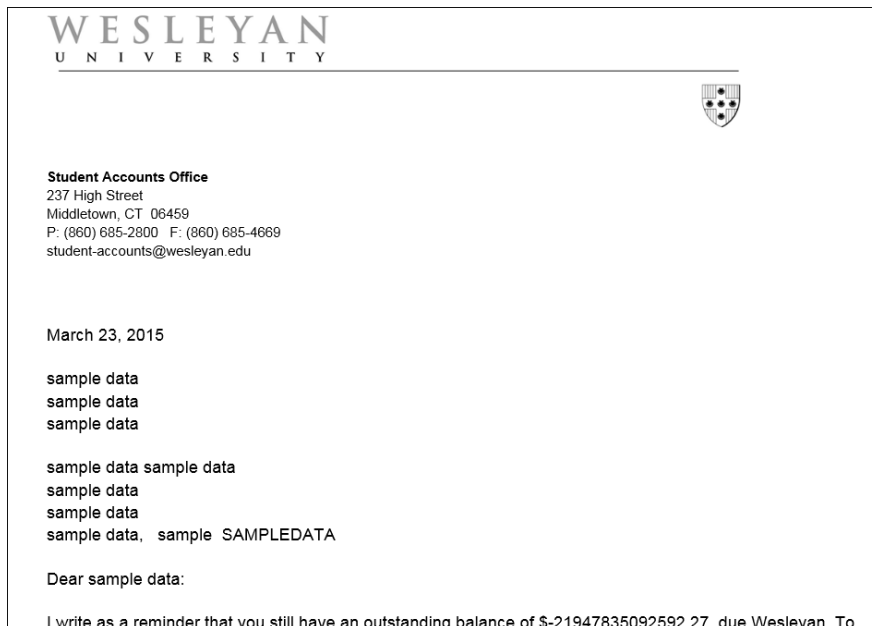
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1. For this example, the Word template file is the one referenced above – **S4E\_Pre\_Collect\_StudentLeft.rtf**.
2. The name of the template file will appear on the bottom of the page.
3. Notice that the Preview button is now available.



- The **Preview** button uses the sample XML data file to generate report output. When selected, it generates readable output.



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- **Report Output Parameters:** Click on the **Output** tab to verify or define the Output Type.

Definition | Template | **Output** | Properties | Security | Bursting

Report Name: SFACTSF1

**General**

**Runtime Output Format Options**

Format Type	Enabled	Default
HTML	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PDF	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
RTF	<input checked="" type="checkbox"/>	<input type="checkbox"/>
XLS	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Output Location**

\*Location: Any

File Name:

Add | Update/Display | Include History | Correct History

Save

- Leave all **Format Types** set at **Enabled**. This allows for more flexibility on the Communication side setup.
- For printed letters, set the **Default** type to PDF or RTF.
- For email, set the **Default** type to HTML.
- Setting your **Location** to **Any** will allow you to choose the location on the CommGen Run Control.
- **Properties:** Click on the **Properties** tab.
  - Tools 8.5 and above require **pdf-security** to be set.
  - The pdf-security setting should already be set properly. If it is not, this is the method to set it:
    1. From the **Property Group** dropdown, select **pdf-security**.
    2. The **Default** should be set for **False**. (This property set to False controls the merge of all pages in the output and eliminates blank pages.)
    3. If it is not set to False, change the Prompt value for the Property pdf-security to **False**. When you save it should appear as follows:

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Report Name: SFACTSF1

Report Properties

Property Group: PDF Security

Property	Prompt	Password	Default
pdf-security			False
pdf-open-password			
pdf-permissions-password			
pdf-encryption-level			0
pdf-no-printing			True
pdf-no-changing-the-document			True
pdf-no-cceda			False
pdf-no-accff			False
pdf-enable-accessibility			True
pdf-enable-copying			False
pdf-changes-allowed			0
pdf-printing-allowed			0

Buttons: Add, Update/Display, Include History, Correct History, Save

- Click **Save**.

## 15. Create or Adjust the Letter Code

- In this step you will return to the Standard Letter page in order to link the **Report Definition** to the **Letter Code**.
- A letter code must exist for each template that you plan to use. This is where you add the Report Definition you want to use for the Communication Generation process.
- **IMPORTANT NOTE:** The communication generation process depends on the **Letter Code** to determine which **Data Source** and **Template** to use. If the **Report Definition** with the desired **Data Source** and **Template** is not associated with a valid **Letter Code**, it cannot be used to generate an output.
- Whether you associate the **Report Definition** with the Letter Code when you first create the **Letter Code** or you go back and adjust the **Letter Code** to include the **Report Definition**, you must make the association for the **Communication Generation** process to use it.
- You can have multiple **Report Definitions** for each **Letter Code**.
- Link the **Report Definition** to the **Letter Code** by checking the **Define Comm Gen Parameters** box on the **Standard Letter Table CS** page as follows.
- Access the Standard Letter Table CS page. Navigation – **Main Menu > Campus Community > Communications > Set up Communications > Standard Letter Table CS**
- On the Search page, enter/search for the Letter Code (in this example, **S4E**).

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- The setup for this Letter Code is demonstrated in the document **Part I – Managing Communications, Section 4 – Create the Letter Code**).

**Standard Letters**

Letter Code S4E

\*Description Pre-Collect - Student has left Short Description PreCol S4E

Set Letter Code Student Accounts

**Processing Letter Details**

\*Function General

Applicable to  Persons  Organization

\*Letter Type Softcopy

\*Letter Printed Data Name/Address Only SQC Name

Joint Communications Allowed

Include Enclosures

Define Comm Gen Parameters

- The fields at the top of the page remain the same.
- The information under **Processing Letter Details** should appear as follows:
  - Function** – Do not change.
  - Applicable to** – Do not change.
  - Letter Type** – Do not change. **Note:** Leave as **Softcopy** in order to make available the **Define Comm Gen Parameters** check box.
    - Reminder:**
      - Hardcopy** – does not allow the system to extract data or merge into a soft copy template. It indicates preprinted items, such as brochures or pamphlets.
      - Softcopy** – Allows the system to extract data and merge into a soft copy template, which you can then print.
  - Letter Printed Data** – Do not change.
  - SQC Name** – Remains blank.
  - Joint Communications Allowed** – Remains blank in this example.
  - Include Enclosures** – Remains blank in this example.
  - Define Comm Gen Parameters** – Select to allow the **Communication Generation** process to generate communications with this **Letter Code**.
    - 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, i.e., GEN.
- When selected, the **Template Section** group box opens:

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- The **Template Selection** group box is available only when the **Define Comm Gen Parameters** check box is selected. The fields under Template Selection are related to the Communication Generation process only.
- Click on the **Report Name** link and select the **Report Name from the list**. In this case, it is the newly created **Report Definition** of **S4E**.
- **Error Message?** If you receive an error message while attempting to add the Report Definition:
  - First check to be sure that the Report Definition and Template fields are all properly filled. For example, the Channel field must be populated on the Template page.
  - If that is not the problem, then check the underlying query.
- The **Template Selection** section of the **Standard Letters** page now appears as follows:

Template ID	Description	Language	Method	Default Template
S4E_1	S4E_Pre_Collect_StudentLeft	English	Letter	<input checked="" type="checkbox"/>

- Under the **Template Selection** area are these fields:

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- **Report Name** – The system displays the name of the **Report Definition** associated with the specified **Letter Code** and **Administrative Function**.
  1. To replace a report, click the Report Name link next to it and select the desired report on the Look Up Report Name page.
  2. To add a report, add a new row and click Report Name, and select the desired report.
  3. The **Report Names** listed on the **Standard Letters** page when you save it are the **Report Definitions** that will be available on the **Communication Generation process Run Control page** for this Letter Code.
    - a. Of those reports, only the reports to which the user has security access will be available to that user.
    - b. Making multiple reports available can be useful if multiple users send different templates or personalized templates for the Letter Code.
- **Data Source ID** – Displays the **Communication Data Source ID** that is associated with the Report Name that you enter.
- **Template List/Template ID** – Lists the Template ID(s) available for merging with the Data Source.
- **Template List/Description, Language, Method, and Default** – The system displays information about the templates available for this communication.
- **View Report Definition** – If desired, you can click to open a new browser window displaying the **Report Definition** search page.
  1. In the new browser window, enter the Report Name or other information about the definition that you want to view and click Search to access the Report Definition component for the report.
  2. View the Report Definition to confirm that it is the definition that you want to make available and also to preview the templates.
  3. You can make changes to the Report Definition.
- Click **Save**.

## 16. **Create a Population Selection (Pop Select) Query**

- The Population Selection query is used to determine the population to whom you will be sending your communication.
- It is an entirely separate query from the one used previously in CommGen setup (the Data Source query).
- It is used to assign a new communication record to individuals.
- **Bind Records:**
  - Each Administrative Function has a Bind Record (or Bind Table) which **must be included** in any Pop Select query for it to be valid.
  - Always start your query with the Bind record.
  - If you always select this record first, and then add additional records, you will then be able to see your queries in the Population Selection PS Query selection field on the Run 3C Engine page.

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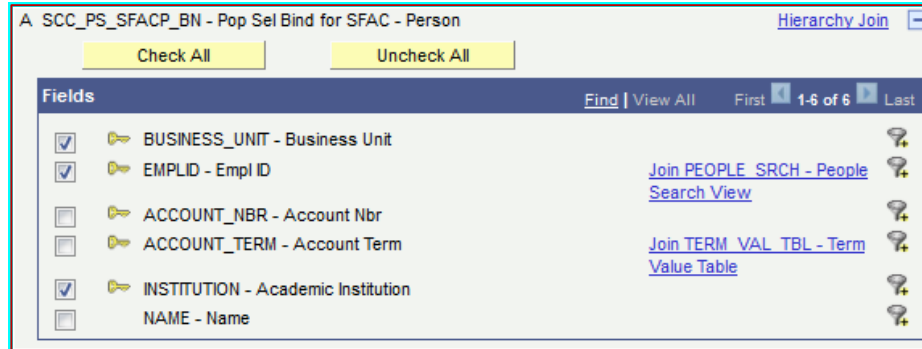
- You will ensure that your query is able to populate all the fields in the bind record (such as EMPLID, Institution) too, possibly through the use of some prompts depending on what your query is selecting.
- The Bind Record binds the Variable Data to the Query.
- A Bind Record is a view that contains only data that already exists.
- This is where you build your conditional logic to attach communications to the correct population.
- The Bind Records are actually SQL views of other records. In order to use the Bind Record for the query it is necessary to have real data in the tables upon which it is based.
- You must have the key variables as fields in your query. It should, at a minimum, have the same prompts as required by the Admin Function.
- You must also have the variable data as prompts in the query.
- Examples of Bind Records include:
  1. SCC\_PS\_GENP\_BND - PopSel Bind for GEN Person
  2. SCC\_PS\_SFACP\_BN - Pop Sel Bind for SFAC – Person
  3. SCC\_PS\_STRM\_BND - PopSel Bind record for STRM
- To see the names of the Bind Records in Query Manager, search for **Record Name begins with SCC\_PS%BN.**
- You can create the Pop Select Query at any point in the process. You may even launch the **Query Manager** while on the **Run the 3C Engine** page.
- **Distinct:** Be sure to return Distinct rows because, if you have duplicate IDs in your output, you will assign the communication to that ID as many times as it is on the Query.
- Open Query Manager: **Reporting Tools > Query > Query Manager**

	<b>Naming Convention for Pop Select Queries</b>
	<ul style="list-style-type: none"><li>• Letter “W”</li><li>• Two-character code for the office</li><li>• Two letters “PS” for Pop Select</li><li>• Underscore, then three characters for Admin Function</li><li>• Underscore, then a meaningful name to identify the communication</li></ul>

- In this example (**WSF\_PS\_GEN\_PRECOL\_GRAD\_BALANCE**) the query is selecting students with these attributes:
  - The associated Admin Function is **GEN**. The Bind record is **SCC\_PS\_GENP\_BND** - PopSel Bind for GEN Person
  - From the record **WES\_STUDENT**:
    1. A Program Action equal to COMP.
    2. A Program Reason equal to GRAD.

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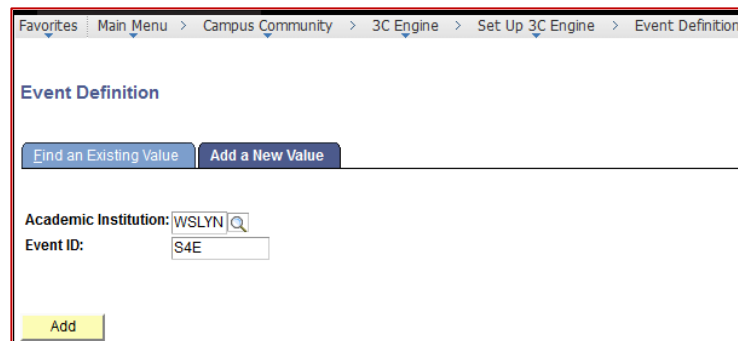
3. Generally, they are recent graduates. The Class Year is prompted.
- From the record **WSF\_NET\_ACT\_BAL**:
  1. An Account Balance greater than the prompted amount.



- As you make changes while creating the query, be sure that the “Distinct” box is checked to prevent duplication.

## 17. Create Event Definition – Event ID - Define 3C Engine Events

- Once your query is finalized and you know who you are going to be sending your communication to, an **Event ID (Event Definition or 3C Event)** must be created.
- **Purpose:** The Event Definition defines what will automatically be assigned using Speed Keys.
  - It sets up the rules by which the system identifies the sets of communications, checklists, and/or comments that will be added or updated by the 3C Engine process.
  - It defines what PeopleSoft will add to a record for an Emplid, i.e. it defines what you want done for your student population.
- The **3C Groups Security** defines who has access to this Event Definition.
- Multiple Communication Speed Keys can be attached, for example, email and letter.
- Access the Event Definition page. Navigation - **Campus Community > 3C Engine > Set Up 3C Engine > Event Definition**
- **Start by adding a new value for the field Event ID.**
- **The Event Definition should have the same name as the Letter Code.**





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- Click Add. The page opens with just two fields populated:
  - **Effective Date:** Change to 01/01/1900.
  - **Status:** Leave as Active.
- When completed, the page should be similar to the following:

The screenshot shows the 'Event Definition' page in PeopleSoft CS 9.0. The page title is 'Event Definition' and the breadcrumb trail is 'Main Menu > Campus Community > 3C Engine > Set Up 3C Engine > Event Definition'. The page displays the following information:

- Academic Institution:** Wesleyan University
- Event ID:** S4E
- Event Detail:** This section is expanded and contains:
  - \*Effective Date:** 01/01/1900
  - \*Status:** Active
  - \*Description:** Pre-Collect - Student has left
  - \*Short Description:** PreCol S4E
  - \*Function:** GEN (General)
  - User Selection:**  (unchecked)
- Communications:** This section is expanded and contains:
  - \*Comm Key:** S4E (Pre-Collect - Student has left)
- Comments:** This section is expanded and contains:
  - \*Comment Category:** (empty)
- Checklists:** This section is expanded and contains:
  - \*Checklist Code:** (empty)
  - Update Status:**  (unchecked)

At the bottom of the page, there are buttons for 'Save', 'Return to Search', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

- The fields under **Event Detail** should be updated as follows:
  - **Description** – in this example, the Communication Speed Keys Description is used
  - **Short Description** – same as the Comm Key Short Description
  - **Function** – Enter the Functional area for this 3C Engine Event (i.e., the GEN Function).
  - **User Selection** – Leave unchecked. Information regarding this box:
    1. Select this checkbox to enable users to select the communication, comment, and checklist to assign to transactions for this 3C Engine Event Definition. When selected, the engine assigns only the communication, comment, and checklist specified by the user.
    2. When not selected, the engine assigns **all** communications, checklists, and comments identified in this 3C Engine Event.
- Under **Communications:**
  - **Comm Key** – Enter the Comm Key to specify the communication to assign as part of this 3C Engine Event. Press Tab.

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- **Detail** – When you press Tab, **Detail** becomes a link. You can click the link to access the Comm Key Detail page, where you can view or edit the details of the specified Comm Key. If any elements are missing, return to the appropriate page to update it.

Favorites | Main Menu > Campus Community > 3C Engine > Set Up 3C Engine > Event Definition

### Comm Key Detail

\*Category: SBALNC Student Accounts Balances  
\*Context: SPRCLT Pre-Collect Letters  
\*Method: L Letter Direction: Outgoing Communication  
Letter Code: S4E  Joint Communications Allowed  Include Enclosures  
Comment:   Print Comment

[Comm Key Joint Rules](#)

OK Cancel

- Click on the OK or Cancel button to return to the Event Definition page.
- Click **Save**.

## 18. Assign Event 3C Group(s) to the Event Definition (Assign Security)

- Just as with the **Communication 3C Group**, the **3C Event Group** controls who can access the **Event ID**.
- Assign engine event 3C groups to assign security to 3C engine event definitions.
- Access the Event 3C Groups page. Navigation – **Campus Community > 3C Engine > Set Up 3C Engine > Event 3C Groups**
  - a. Search for and select the desired Event ID (in this example, **SFACTSF1**).
  - b. Under **\*Group**, select the Group or Groups to be associated with the Event ID:

Favorites | Main Menu > Campus Community > 3C Engine > Set Up 3C Engine > Event 3C Groups

### Event 3C Groups

Academic Institution: WSLYN Wesleyan University  
Event ID: S4E Pre-Collect - Student has left  
Function: General

Update/Inquiry Group	
*Group	Description
SF	Student Financials

Save Return to Search Notify Refresh

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- c. Click **Save**.

## 19. **3C Engine Run Control – Run 3C Engine**

- Navigation: **Campus Community > Communications > Run 3C Engine**
- **Important Note:** The Run 3C Engine process must be run before the Communication Generation process.
- The Run 3C Engine process creates the communication record for the selected cohort.
- The Run Control lets you define:
  - How you assign the 3C
  - Which event?
  - If PS Query, which one.
  - Allows you to manage duplicates.
- The PeopleSoft Process Scheduler is used to run the 3C engine process. Familiarity with using this feature is recommended to generate communication assignments systematically.
- Run 3C Engine with the Population Selection query to assign the communication.

The screenshot shows the 'Run 3C Engine' search criteria page. The breadcrumb trail is 'Favorites > Main Menu > Campus Community > Communications > Run 3C Engine'. The page title is '3C Engine'. Below the title, there is a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. Below the tabs is a 'Search Criteria' section with a dropdown menu set to 'Run Control ID: begins with' and an empty text input field. There is a 'Case Sensitive' checkbox which is unchecked. At the bottom, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

- To add a new Run Control, start by clicking on the Add a New Value tab. Enter the Run Control ID (use the same name as the Letter Code) – in this example, S4E.
- The page when opened will resemble this

The screenshot shows the '3C Engine Parameters' page. The breadcrumb trail is 'Favorites > Main Menu > Campus Community > 3C Engine > Run 3C Engine'. The page title is '3C Engine Parameters'. Below the title, there is a 'Run Control ID: S4E' field and a 'Run' button. There are two tabs: '3C Engine Parameters' (selected) and 'Manage Duplicate Assignment'. Below the tabs, there are two sections: 'Process 3Cs' and 'Process Joint Records'. The 'Process 3Cs' section has three checkboxes: 'Population Selection', 'Trigger Table', and 'Mass Change'. The 'Process Joint Records' section has three radio buttons: 'No' (selected), 'Yes, all Joint IDs', and 'Yes, if match exists'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'. There is also a link for '3C Engine Parameters | Manage Duplicate Assignment'.

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- **Populate the fields as follows:**
  - **Process 3Cs:** Check Population Selection. When you do so, the rest of the page opens.

- **Academic Institution:** WSLYN
- **Administrative Function:** In this example, GEN.
- **Event ID:** The Event Definition (Event ID) recently created (S4E\_).
  1. Notice that after these fields have been filed, the Comm Key is displayed under the Communication Key section.
- The page now looks like this:

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- **Detail:** You can click on the Detail link to access the **Event Definition** page for the specified event ID where you can view or update the event definition and determine which communications, checklists, and comments the definition includes.
- The **Event Definition** Search page opens as shown below.
- **Important Note:** There is a glitch that prevents the display of the proper page. See that there is a notation at the bottom of the page that reads “No matching values were found.”

The screenshot shows the 'Event Definition' search interface. The breadcrumb trail at the top reads: Favorites | Main Menu > Campus Community > 3C Engine > Set Up 3C Engine > Event Definition. The page title is 'Event Definition'. Below the title, it says 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two buttons: 'Find an Existing Value' and 'Add a New Value'. A 'Search Criteria' section contains the following fields:

- Academic Institution: begins with [dropdown] WESLYN [search icon]
- Event ID: begins with [dropdown] S4E [search icon]
- Description: begins with [dropdown] Wesleyan University [search icon]
- Administrative Function: begins with [dropdown] GEN [search icon]

Below these fields are three checkboxes: 'Include History', 'Correct History', and 'Case Sensitive'. At the bottom of the search criteria section are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. At the very bottom of the page, the text 'No matching values were found.' is displayed and circled in red. A red arrow points from the right side of the page to the 'Description' field.

- To get around this anomaly, remove from the **Description** field the words “**Wesleyan University**,” then click the Search Button (i.e., leave the field blank). When you do so, the **Event Definition** page opens as follows:

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**Event Definition**

Academic Institution: Wesleyan University  
Event ID: S4E

**Event Detail** Find | View All First 1 of 1 Last

\*Effective Date: 01/01/1900 \*Status: Active

\*Description: Pre-Collect - Student has left

\*Short Description: PreCol S4E  User Selection

\*Function: GEN General [Variable Data Joint Rules](#)

**Communications**

\*Comm Key: S4E Pre-Collect - Student has left [Detail](#)

**Comments**

\*Comment Category: Detail

**Checklists**

\*Checklist Code: Detail  Update Status

Save Return to Search Notify Add Update/Display Include History Correct History

- To return to the **Run 3C Engine** page, you can click on the tab for that page. Unless you are going to be working with the Checklist or Comment sections, there is only one more area on this page to fill:
  - Population Selection:**
    - Selection Tool:** Select PS Query.

Favorites Main Menu > Campus Community > 3C Engine > Run 3C Engine

**3C Engine Parameters** Manage Duplicate Assignment

Run Control ID: S4E [Report Manager](#) [Process Monitor](#) Run

**Process 3Cs**

Population Selection  
 Trigger Table  
 Mass Change

**Process Joint Records**

No  
 Yes, all Joint IDs  
 Yes, if match exists

**Event Selection**

Academic Institution: WSLYN Wesleyan University  
Administrative Function: GEN General  
Event ID: S4E Pre-Collect - Student has left [Detail](#)

**Communication Key**

S4E Pre-Collect - Student has left

**Checklist Code**

**Comment Category**

**Population Selection**

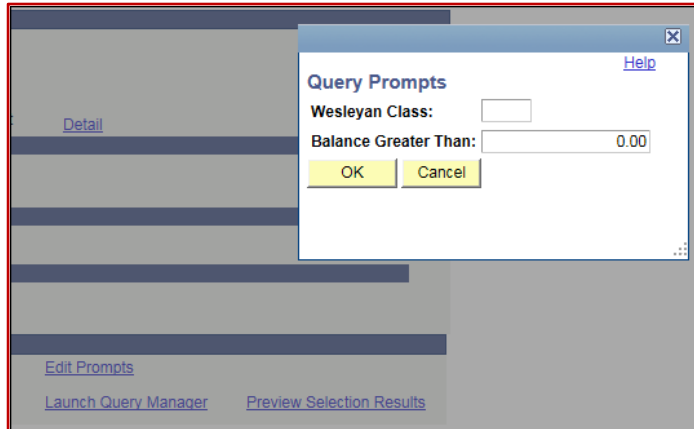
Selection Tool: PS Query [Edit Prompts](#)  
Query Name: WSF\_PS\_GEN\_PRECOL\_GRAD\_BALAN [Launch Query Manager](#) [Preview Selection Results](#)

Save Return to Search Notify Add Update/Display

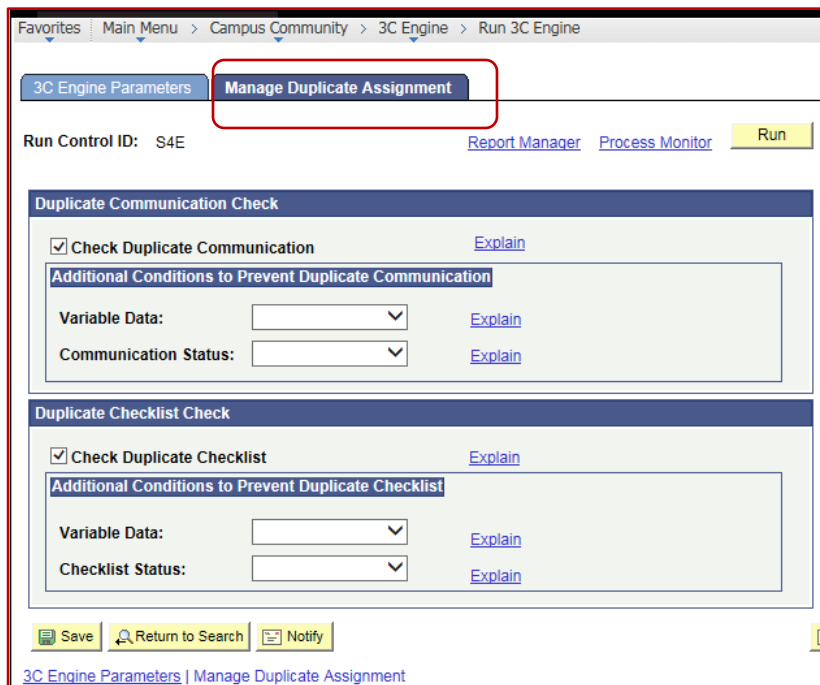
[3C Engine Parameters](#) | [Manage Duplicate Assignment](#)

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2. **Query Name:** In this example, select WSF\_PS\_GEN\_PRECOL\_GRAD\_BALANCE.
  - a. If your query does not appear in the selection box, then there is an issue with the query. Check the prompts.
  - b. **Note:** If the query has duplicates in the selection, the duplicate check will not stop the process.
- **Edit Prompts:** When you click on this link, a popup box will appear with prompts from the Pop Select Query. You cannot see the **Preview Selection Results** without entering the prompts.



- **Launch Query Manager:** Click to see the Pop Select Query.
- **Preview Selection Results:** Click to view the recipients of the communication.
- **Manage Duplicate Assignment**
  - **Purpose:** Prevent duplicate records from being assigned again.



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- The **Check Duplicate Communication** and **Check Duplicate Checklist** boxes are checked by default.
- Specify conditions for preventing duplicate communication and checklist assignment.
- Considerations:
  1. Use if you know you don't want a communication to be assigned to an individual.
    - a. Build your query so that it excludes people already assigned.
    - b. Don't use check if you know you want to send a specific communication to an individual multiple times.
  2. Duplicate management can be used in conjunction with variable data associated with the Administrative Function.
  3. If the person (or organization) has already had the communication assigned to them, do you want to allow the process to assign another?
- Click the **Explain** link beside any item to display a message explaining the options and function of that item.
- **Check Duplicate Communication:** Select this check box to require the 3C engine to determine if a communication is a duplicate before assigning it.
  1. When this option is selected and no additional conditions are specified, the engine does not assign the duplicate if it finds that a communication of that letter code is already assigned.
  2. When this check box is not selected, the engine assigns the communication, whether or not it is a duplicate.
- There are detailed descriptions of how to use these selections in PeopleTools at:  
[http://docs.oracle.com/cd/E17221\\_01/cs9pbr2/eng/psbooks/lsc/book.htm?File=lsc/htm/lsc43.htm%23F1ID\\_MANAGE\\_DUP\\_ASSIGN](http://docs.oracle.com/cd/E17221_01/cs9pbr2/eng/psbooks/lsc/book.htm?File=lsc/htm/lsc43.htm%23F1ID_MANAGE_DUP_ASSIGN)

## 20. Communication Generation Run Control

- **Selection Parameters (first page)**
- Navigation: **Campus Community > Communications > Communication Generation**
- **Purpose:** The function of the Communication Generation process is to generate letters/emails for created communication records not completed. The process is driven by the Letter Code.
- Once the 3C Engine process has been run (which creates the communication record for the selected cohort), the Comm Gen process can be set up and run.
  - You can't set up this Run Control unless you've assigned the communication to at least one user.
- Use this page to specify general parameters for the Communication Generation process to use for extracting data, including recipient IDs for which data is to be extracted, the Letter Code, and the Report Definition name. Also define the language and the method to use for generating the letter or email.
- Start by adding a new **Run Control ID**. **The Run Control ID should have the same name as the Letter Code**. In this example, the name given is **S4E**.
- The first page is **Selection Parameters**, and when completed will resemble this:



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Run Control ID: S4E

ID Selection: All Person IDs

\*Letter Code: S4E Pre-Collect - Student has left Administrative Function: GEN General

Template ID	Description	Language	Method	Default Template
S4E_1	S4E_Pre_Collect_StudentLeft	English	Letter	<input checked="" type="checkbox"/>

Communication Language Usage: Specified Language: English

Communication Method Usage: Specified Method: Letter

- **ID Selection:** Select the type of IDs to process:
  - All IDs, All Person IDs, One Person ID, All Org IDs, or One Org ID.
  - These are translate values and should not be modified.
  - **IDs that are available for processing...**
    - **Have a communication assigned to them using the specified letter code,**
    - **Are within the communication date range, and**
    - **Are not yet completed.**
  - For this example, select **All Person IDs**.
- **Letter Code Selection:** Select the **Letter Code** from the dropdown box.
  - For this example, select **S4E**.
  - **Note:** Only letter codes set up for the Communication Generation process and that are currently assigned to the specified IDs are available (i.e., a valid communication has been created and is in the Communication table).

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- **If you do not see the Letter Code:** If you selected **All Person IDs** for ID Selection, and the **Letter Code** you expect is not in the dropdown list, most likely the **Letter Code** has not been assigned to the specified IDs. Items to check are:
  - Has the **Run 3C Engine** process been run?
  - Has the **Letter Code** been associated with the **Report Definition**?
  - Are the IDs in the **Communications** table? (Check with a query.)
- **Administrative Function:** Displays the **Admin Function** associated with the Letter code.
- **Template Selection:** Once you have selected the **Letter Code**, if there is only one related Report, that is the Report Name which will appear in this section.
  - If there is more than one report, click on **Report Name** link to view them all.
  - **View Report Definition:** If you wish to look at the Report Definition, click on the **View Report Definition** link.
  - **Note:** If you see no **Report** name or the **Report** you expect to see does not appear, check the following:
    - Is the **Report Definition** active?
    - Is there a default **Template**?
    - Is there a **Template** file uploaded?
    - Is the **Template** file active?
    - Is the Effective Date for the **Template** <= today?
    - Do you have the right permissions to see the **Report**, i.e., do you have a role which has access to the **Report Category** assigned to the **Report**?
  - **Data Source ID** and **Template List** associated with the **Report** are displayed.
  - **Enclosures Assigned (Softcopy):** If the **Letter Code** includes softcopy enclosures for the IDs, the system displays each enclosure code and its relevant information. Enter the **Report** name to use for each enclosure. If no softcopy enclosures are included, the system collapses the group box.
- **No Matching Template Found:** Select an option to specify what to do if the language and method combination to use for an ID is not listed in the **Template** list for the **Report Name** selected.
- **Refresh Enclosure List** Button: Click to cause the **Enclosures Assigned (Softcopy)** section to include all available softcopy enclosures including enclosures that were added to the system since the last refresh of the process **Run Control ID**.
- **Communication Language Usage** and **Communication Method Usage:** Select options in these group boxes to identify the Template for the Communication Generation process to use. In General you should not use these boxes and you should leave the default of **Specified** checked in each.
- **Process Parameters (second page)**
- On this page, define the **Person Communication Usage**, the **Communication Processing Dates**, and **Output Settings**.

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- **Usage Tables > Person Communication Usage**

1. Fields in this group box are available for input only if **the ID Selection** field on the **Selection Parameters** page is set to All IDs, All Person IDs, or One Person ID.
2. If the field is available, you must enter the usage to apply.
3. **Address:** Select appropriate **Address** from the **Address Usage Table** look up values.  
**Note:** Cannot send to multiple addresses. Once an address is found, the communication goes.
4. **Address Name, Salutation, and Extra Name:** Derived from the Name Usage Table.
5. **Note:** Email communications need an “Email” **Address Usage Type**
  - a. **Warning from PeopleBooks regarding Communication Usage:**
    - i. If the Communication Generation process encounters IDs that are set to receive an email but the address usage does not include email

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types, the process cannot send the email and therefore will not generate the communication for those IDs.

- ii. When the method selected on the **Selection Parameters** page is **Email** or **Preferred**, then the address usage must include email types or a combination of address types and email types; at least one template for the main letter code must be for emails.

- **Usage Tables > Joint Salutation Usage**
- **Usage Tables > Org Communication Usage**
- **Communication Processing Dates > Communication Date Range Selection**
  1. Enter the date range of the communication records from which to extract data.
  2. The **From Date** and **To Date** ranges are inclusive of the dates that you enter.
  3. **IMPORTANT NOTE:** If you set the **Communication Date Range Selection** to a very short period, there will be no output. The process will only print letters which were created within the Date Range. So set it for a long interval to avoid problems.
- **Communication Processing Dates > Update Communication Generation Date With**
  1. Default is System Date
- **Communication Processing Dates > Updated Communication Completed Date With**
  1. Default is System Date
- **Output Settings**
  1. **Online Preview:**
    - a. Select to preview the output online in PeopleSoft Report Manager. When selected, the system sends a sample of all related outputs for Letters and Emails to PeopleSoft Report Manager with corresponding links for you to click to preview each output.
    - b. Previews do not cause communications to be marked completed.
    - c. No information is entered in the Person or Organization Communication Management components for the communication.
    - d. When generating communications for multiple IDs, the online preview functionality extracts data for previews of only the first 10 IDs and their enclosures and recipients.
    - e. Report Manager Output: Under the Report and Report Description columns are displayed the names of the sample communications as PDFs.
      - i. The names include the Letter Code, the EmplID, the recipient's name, and a sequence number (1 through 10).
      - ii. For example, for the S4E letter, a typical Report name/Report Description might be *S4E [999999 JOHN JONES 7] – S4E.pdf*

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The screenshot shows the 'Communication Generation' page in PeopleSoft. At the top, there are navigation tabs: 'List', 'Explorer', 'Administration', and 'Archives'. Below these is a 'View Reports For' section with fields for 'Folder', 'Instance', 'to', 'Name', and 'Created On', along with a 'Refresh' button and a 'Last' dropdown menu. The main area is a table titled 'Reports' with columns: Report, Report Description, Folder Name, Completion Date/Time, Report ID, and Process Instance. The table contains 11 rows of data, with the 7th row highlighted in blue and containing the report 'SCC\_COMMGEN'.

Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1	S4E	General	04/02/15 3:49PM	670213	551844
2	S4E	General	04/02/15 3:49PM	670209	551844
3	S4E	General	04/02/15 3:49PM	670212	551844
4	S4E	General	04/02/15 3:49PM	670216	551844
5	S4E	General	04/02/15 3:49PM	670215	551844
6	S4E	General	04/02/15 3:49PM	670214	551844
7	SCC_COMMGEN	General	04/02/15 3:49PM	670208	551844
8	S4E	General	04/02/15 3:49PM	670211	551844
9	S4E	General	04/02/15 3:49PM	670210	551844
10	S4E	General	04/02/15 3:49PM	670208	551844
11	S4E	General	04/02/15 3:49PM	670207	551844

- e. If you click on one of the ten links to the sample communications in Report Manager under the Report Column, you can view a PDF version of the output, complete with all the variable data that was added to the Template.
- f. **Email Address:** If **Online Preview** is selected, and if on the **Selection Parameters** page, the **Communication Method Usage** is either **Email** or **Preferred**, then the **Email Address** field appears. Enter an email address that you can access to see how the emails will be sent.

The screenshot shows the 'Output Settings' dialog box. It has a title bar 'Output Settings'. Below the title bar, there is a '\*Sort Option:' label followed by a dropdown menu showing 'Country, Postal'. There are two checkboxes: 'Online Preview' (checked) and 'Send to Printer' (unchecked). To the right of the 'Online Preview' checkbox is an 'Email Address:' label followed by an empty text input field.

- g. **Note:** When emails are generated, the main letter code template is used as the body text of the email. To do so, the Communication Generation process automatically converts the format of the main letter template to HTML format. If enclosures are assigned, they are sent as attachments and their

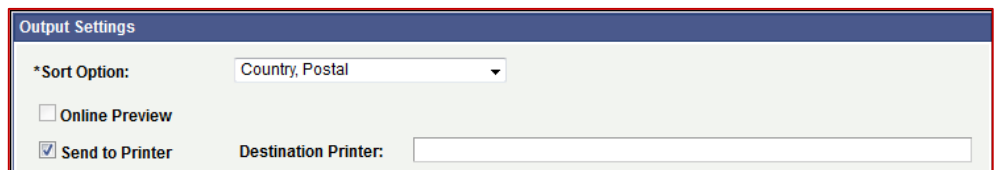
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format is not converted. The process uses their default output type as set in the report definition.

- h. When you select **Online Preview** for an email communication, the system sends samples of the generated outputs to the specified email address.
  - i. It also includes the output samples in PeopleSoft Report Manager.
  - ii. In Report Manager, you can view the outputs for the main letter code in HTML format.
- i. **Generating Emails and Letters at the Same Time:**
  - i. Because the **Communication Generation** process can generate emails and letters at the same time (if you use the **Communication Preferences** feature), run the process a second time, but this time do not enter an email address for the **Online Preview**.
  - ii. The outputs for the main letter code will not be converted into HTML format and you can see exactly what the outputs will look like.
- j. **Notes regarding Output Settings:**
  - i. You cannot save an email to the printer or to a file
  - ii. You cannot send communications set to Online Preview to the printer.
  - iii. You cannot save communications set to Online Preview to a file.

## 2. Send to Printer and Destination Printer:

- a. If the **Communication Method Usage** is either **Letter** or **Preferred** on the Selection Parameters page, then the **Send to Printer** option is available.
  - 1. Select the check box to send letter communications directly to the printer. When selected, the **Destination Printer** field appears. You must enter the path to the printer.



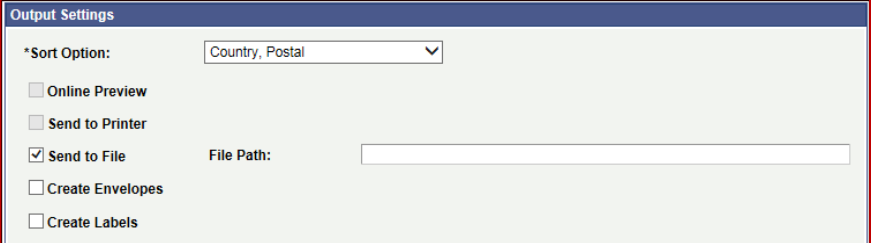
- 2. When you are generating letters, you can retrieve the output at the specified printer or by clicking the View Generated Communication link in each processed ID's Person or Organization Communication component (if the letter code is set to save the data to the communication record), or both.

## 3. Send to File and File Path:

- a. If the communication method usage is either **Letter** or **Preferred** on the **Selection Parameters** page, then the **Send to File** option is available.

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- b. Select the check box to save the generated letter communications as a single file. When selected, the **File Path** field appears. You must specify the file path to use.



- c. When the process runs, it sorts and merges all the final letters into one file and saves it to the file path that you entered. The filename is CommGen\_<process instance nbr>.pdf, where <process instance nbr> is the unique process instance number assigned by the Communication Generation process for that run.
  - d. You can use the file to make last-minute changes to the communications or send to a third-party vendor such as a mailing company.
4. **Warning from PeopleTools regarding Output Settings:**
    - a. When generating letters, you must select either Send to File or Send to Printer to ensure the ability to retrieve and view the letter outputs. If you do not select either Send to File or Send to Printer, you must manually navigate to each processed ID's communication component to retrieve and view the output. However, the output is in the communication record only if the assigned letter code is set to save it there.
    - b. For emails, the process automatically sends the generated communication to each processed ID. You cannot retrieve and view an email output before sending. You can however, select Send to File or Send to Printer to retrieve and view the email that was sent.
  5. **Missing Critical Data**
    - a. Under the **Missing Critical Data** section, choose **Produce Communication** but do not choose **Complete Communication**. If an applicant's record does not contain certain critical data (such as name and address), then the letter will not be completed. Then it can be checked, the issue addressed, and the letter reprinted.

• **Email Parameters Tab (third page)**

1. **From:** You can enter a real or bogus email address (it just needs to be in email format). If it is not a valid email, your template should include text similar to: *This email was sent by an automated system. Do not reply to this email address.*

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2. **Subject:** Enter a subject heading for the email correspondence.
3. **Reply to:** (Optional) Enter if you want to have a “Reply to” address in the email.
4. **Sender:** (Optional) Enter if you want to have a “Sender” address in the email.
5. **Bounce to:** (Optional) If desired, enter email address where invalid deliveries of emails will bounce to.
6. **Importance and Sensitivity:** Options that you select in these group boxes appear in the email transmission for the recipient to see.

## 21. Person Communication – Communication Outcome - View Generated Communication

- Access the Communication Management Page. Navigation: **Campus Community > Communications > Person Communications > Communication Management**
- **Purpose:** View what was actually sent to recipient.
- Template is regenerated each time. File is not saved.
- Dates that communications were sent are preserved based on effective date.
- Below are two examples on the Search Page, showing variations in criteria. If you know the EmplId for the individual, you can simply add the ID or you can enter the First and Last Name. To narrow it down, you can populate other fields such as the Communication Date to encompass a range of dates.

The image displays two side-by-side screenshots of the 'Communication Management' search interface. Both screens feature a header with the title 'Communication Management' and a sub-header 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below the header are two buttons: 'Find an Existing Value' and 'Add a New Value'. A 'Search Criteria' dropdown menu is visible on both. The left screenshot shows the following search criteria: ID (begins with), Sequence Number (=), Communication Date (=), Academic Institution (begins with WSLYN), Administrative Function (begins with GEN), Communication Category (begins with SBALNC), and Communication Context (begins with SPRCLT). The right screenshot shows: ID (begins with), Sequence Number (=), Communication Date (=), Academic Institution (begins with), Administrative Function (begins with), Communication Category (begins with), Communication Context (begins with GREG), National ID (begins with), Campus ID (begins with), Last Name (begins with), and First Name (begins with). Both screens include a 'Case Sensitive' checkbox and a row of buttons at the bottom: 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

- Once the search is finished, a list of communications appears at the bottom of the page. An example showing some of the columns in the first few rows is below (the EmplIds and Names are blocked out):



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## Search Results

View 100

ID	Sequence Number	Communication Date	Academic Institution	Name	Administrative Function	Communication Category	Communication
		04/02/2015	WLSLYN		GEN	SBALNC	SPRCLT
		04/02/2015	WLSLYN		GEN	SBALNC	SPRCLT
		04/02/2015	WLSLYN		GEN	SBALNC	SPRCLT
		04/02/2015	WLSLYN		GEN	SBALNC	SPRCLT
		04/02/2015	WLSLYN		GEN	SBALNC	SPRCLT
		04/02/2015	WLSLYN		GEN	SBALNC	SPRCLT
		04/02/2015	WLSLYN		GEN	SBALNC	SPRCLT
		04/02/2015	WLSLYN		GEN	SBALNC	SPRCLT
		04/02/2015	WLSLYN		GEN	SBALNC	SPRCLT
		04/02/2015	WLSLYN		GEN	SBALNC	SPRCLT
		04/02/2015	WLSLYN		GEN	SBALNC	SPRCLT
		04/02/2015	WLSLYN		GEN	SBALNC	SPRCLT
		04/02/2015	WLSLYN		GEN	SBALNC	SPRCLT
		04/02/2015	WLSLYN		GEN	SBALNC	SPRCLT
		04/02/2015	WLSLYN		GEN	SBALNC	SPRCLT

- In addition to these columns, there are other columns that serve to identify the individuals who have had this communication assigned to them.
- Click on the desired row, and the Person Communication page opens.

Person Communication | Communication Recipient Data

Assign DateTime: 05/22/2015 3:57:05PM

\*Function: STRM Student Term Variable Data

\*Institution: Wesleyan University

Comm Key:

\*Category: GREG Registration Status

\*Context: GREG Registration Status

\*Method: E E-Mail

\*Direction: Outgoing Communication

Letter Code: G1A Summer Session Reg Status Include Enclosures Enclosures

Communication Process Details

Communication Date: 05/22/2015 Begin Time: End Time: Sequence:

Comments: Print Comment Item Sequence:

Communication ID: Department:

Create Joint Communications

Communication Outcome

Communication Generation Date: 05/22/2015

Communication Completed Date Activity Completed: 05/22/2015

Unsuccessful Outcome Reason:

Language Used: English

Method Used: E-Mail

Process Used: CommGen View Generated Communication

Process Instance: 682514

Save Return to Search Previous in List Next in List Notify Add Update/Display

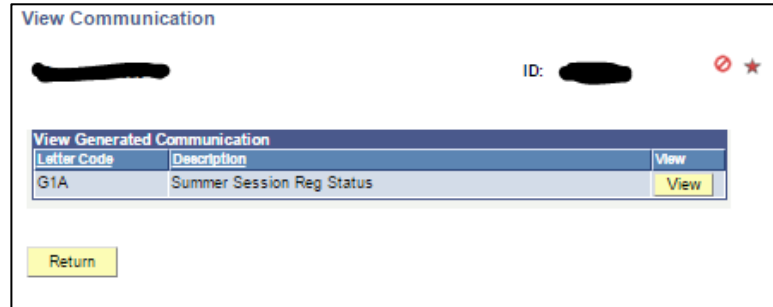
- To understand the details of this page, read over the next section “Assign a Communication to an Individual.”

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- Review the fields to be sure this is the communication you are looking for, and then click on the **View Generated Communication** button.
- The View Communication page opens:



- Click on **View**. A complete copy of the communication open (RTF Template) opens.
- **Considerations:**
  1. You really want to run your 3C Engine and CommGen as close together as possible. Otherwise, the population might be out of date.
  2. If you schedule them separately, the 3C Engine might not finish before the CommGen starts – i.e. incomplete population.

## 22. Assign a Communication to an Individual

- This demonstration of assigning a Communication to an individual illustrates the use of the **Communication Management** pages. You can access the **Communication Management** pages as described here, or you can access them by clicking the Communication button on pages throughout the system. You will see this references pages spoken of in the previous demonstration.
- Open the **Communication Management** page: Navigation: **Campus Community > Person Communication > Communication Management**

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The screenshot shows the 'Communication Management' page in a web browser. The breadcrumb trail is: Favorites > Main Menu > Campus Community > Communications > Person Communications > Communication Management. The page title is 'Communication Management'. Below the title is the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two buttons: 'Find an Existing Value' and 'Add a New Value'. A 'Search Criteria' section is expanded, showing a list of search fields: ID, Sequence Number, Communication Date, Academic Institution, Administrative Function, Communication Category, Communication Context, National ID, Campus ID, Last Name, and First Name. Each field has a dropdown menu (mostly set to 'begins with') and a search icon. There is also a 'Case Sensitive' checkbox. At the bottom are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

- Enter the ID of the individual in the first box and click on Add a New Value.
- When the next page opens, click on the Add button.

This screenshot shows a portion of the 'Communication Management' page. It features the 'Find an Existing Value' and 'Add a New Value' buttons. The 'ID:' field is highlighted with a black box, and a search icon is visible to its right. Below the field is a yellow 'Add' button. At the bottom, there are links for 'Find an Existing Value' and 'Add a New Value'.

- The **Communication Management** page opens as follows:

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Person Communication | Communication Recipient Data

██████████ ID: ██████████

**Communication Assignment**

Assign DateTime: 12/03/2015 3:45:07PM

\*Function:

\*Institution: Wesleyan University

Comm Key:

\*Category:

\*Context:

\*Method:

\*Direction:

Letter Code:   Include Enclosures Enclosures

**Communication Process Details**

Communication Date: 12/03/2015 Begin Time:  End Time:  Sequence:

Comments:   Print Comment Item Sequence:

Communication ID: ██████████

Department:

Create Joint Communications

**Communication Outcome**

Communication Generation Date:

Communication Completed Date Activity Completed:

Unsuccessful Outcome Reason:

Language Used:

Method Used:

Process Used:

Save Notify Add Update/Display

Person Communication | Communication Recipient Data

- Enter or verify the following under **Communication Assignment**:
  - i. **Function** – Select the appropriate Administrative Function
  - ii. **Variable Data** – see below
  - iii. **Institution** – should be filled in with Wesleyan University
  - iv. **Comm Key** – Based on the Function chosen, you will be given a list of possible Comm Keys. Select the desired Comm Key. NOTE: If you do not use a valid communication speed key, you must enter the category, context, method, direction, and letter code values manually.
  - v. **Category** – Populates based on the Comm Key
  - vi. **Context** - Populates based on the Comm Key
  - vii. **Method** – Populates based on the Comm Key
  - viii. **Direction** – Populates based on the Comm Key
  - ix. **Letter Code** - Populates based on the Comm Key
  - x. **Include Enclosures** – If the select letter is set up to include enclosures, this box is checked. If not, you can check to add the desired enclosures.

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- xi. **Enclosures** - This button is available when the Include Enclosures check box is selected. Click to access the Communication Enclosure page, where you can review, add, or delete enclosures.

**(NOTE: The remaining illustrations are from the PeopleTools section on this topic under “Managing Communications.”)**

- A filled out **Communication Assignment** section appears as follows:

Person Communication | Communication Recipient Data

Jane Brisebois ID: CCCG0001

**Communication Assignment**

Assign DateTime: 04/11/2006 2:37:54PM

\*Function: ADMA Admissions Application **Variable Data**

\*Institution: PeopleSoft University

Comm Key:

\*Category: CG Communication Generation Test

\*Context: CG Communication Generation Test

\*Method: L Letter

\*Direction: Outgoing Communication

Letter Code: CG Communication Generation Test  Include Enclosures Enclosures

**Communication Process Details** Checklist Association

Communication Date: 04/11/2006 Begin Time: End Time: Sequence:

Comments: Bonjour! Ceci est un test pour CCCG0001.  Print Comment Item Sequence:

Communication ID: KU0007 Locherty, Betty

Department:

Create Joint Communications

- If required, click on the yellow **Variable Data** button. The Variable Data page appears as follows:

**Variable Data**

Academic Career:

Student Career Nbr:

Application Nbr:

Application Program Nbr:

OK Cancel

- i. On this page you can view or enter the required variable data associated with the specified function. If you make entries, click OK.

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- ii. Proceed to the **Communications Details** portion of the page:

The screenshot shows two sections of a web form. The top section, titled "Communication Process Details", contains fields for "Communication Date" (04/11/2006), "Begin Time", "End Time", "Comments" (Bonjour! Ceci est un test pour CCG0001.), "Communication ID" (KU0007), and "Department". A "Print Comment" checkbox is also present. Below this is a "Create Joint Communications" checkbox. The bottom section, titled "Communication Outcome", contains fields for "Communication Generation Date" (11/06/2009), "Communication Completed" (checked), "Date Activity Completed" (11/06/2009), "Unsuccessful Outcome" (unchecked), "Reason", "Language Used" (English), "Method Used" (Letter), "Process Used" (CommGen), and "Process Instance" (830). A "View Generated Communication" link is also visible.

- i. **Communication Date** - The default communication date is the system's current date. You can override this date. Enter the date on which the communication should be processed.
  - ii. **Begin Time** and **End Time** - Enter the times when the communication begins and ends.
  - iii. **Comments** - Enter comments to further identify or describe the communication for this individual. If comments are associated with the communication speed key, the system automatically displays them here. You can change these comments or delete them.
  - iv. **Print Comment** – Check to print comments on the communication.
  - v. **Communication ID** - Enter the ID of the staff person who communicated with or is initiating this communication with the individual.
  - vi. **Department** - (Optional) Enter the department within your institution that is responsible for assigning this communication.
  - vii. **Create Joint Communications** - This check box is available only if the individual to whom you are assigning the communication has a joint relationship on the Relationships component and if the letter code on the Standard Letters page is set to allow joint communications. When available, select this check box to address the communication jointly to this individual and the related individual identified on the Relationships page.
  - viii. **Checklist Association** - The system automatically populates the fields in this group box only when the communication is created as part of a checklist.
- The fields in the **Communication Outcome** section are automatically completed to indicate the outcome of the communication, at which point the fields become uneditable. If you do not use either of the processes and you want to track the communication outcome, you must manually enter the appropriate values in the fields.
    - i. **Communication Generation Date** - The system displays the date and time when the process generated the communication.

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- ii. **Communication Completed** - Select the check box to indicate that the communication was generated. For example, the communication is complete if the phone call was made or if the letter was generated. If you are using a communication speed key, the system might select this check box for you, depending on information associated with that Comm Key.
- iii. **Date Activity Completed** - Enter the date when completing the communication. The Communication Generation process populates this date with the Update Communication Completed Date With date from their respective run control page. You can manually override this date.
- iv. **Unsuccessful Outcome** - Select this check box to indicate that the communication was unsuccessful. For example, if no one answered the phone or the letter was returned as undeliverable. If you are using a communication speed key, the system might select this check box for you, depending on information associated with that Comm Key.
- v. **Reason** - Available when the Unsuccessful Outcome check box is selected. Indicates the reason that the communication was unsuccessful.
- vi. **Language Used and Method Used** - Displays the values used by the generating process. The Communication Generation process uses the language and method specified on the Communication Generation run control component.
- vii. **Process Used** - Displays the name of the process used to generate the communication: *Letter Gen, Comm Gen, or Manual* if you manually completed the communication.
- viii. **Process Instance** - Appears only when the communication for the ID is marked *Completed* by the Communication Generation, or Envelope and Label Generation process. You cannot change the number. The process instance number is a reference to the communication data used by the process to generate and complete the communication.
- ix. **View Generated Communication** - This link appears only when a communication is generated by the Communication Generation process and the Letter Printed Data field in the Standard Letter Table CS component for the letter code used, is set to *All* or *Name/Address Only*.

- iii. Click Save.

