



Communication Generation Guide – More About the Steps

This is a guide to some of the specifics required by the steps involved in working with Comm Gen/3Cs.

It is keyed to three other documents which you can use and adapt to keep track of your Comm Gen setup:

[Communications Map](#)

[Communication Grid](#)

[Communication Process Checklist](#)

This guide expands upon the basic steps found in the **Comm Gen Grid**. **The designations in the red brackets correspond to the steps in the grid.**

Very detailed instructions are found in:

- COMM GEN PART I Managing Communications
- COMM GEN PART II Defining and Assigning Communications

1. Select Admin Function *[1 – Administrative Function]*

- i) The Administrative Functions are delivered. Do not change!
- ii) Variable Data: All Administrative Functions, except the General Administrative Function (GEN), include variable data enabling you to filter the data to extract for a communication.
- iii) Note that the Effective Date for the Administrative Functions is 01/01/1900.
 - (1) All Administrative Functions have this Effective Date.
 - (2) Use this date wherever an Effective Date is required.

iv) Navigation: Setup SACR > Common Definitions > Administrative Function Table

2. Add a new Letter Code *[2 – Standard Letter Table CS]*

- i) Do not update an existing Letter Code.
- ii) A Letter Code can only have one Method.
- iii) Letter Type
 - (1) Always select “Softcopy” since “Hardcopy” indicates preprinted items, such as brochures or pamphlets.
 - (2) Selecting Softcopy allows the system to extract data and merge into a Softcopy template, which you can then print.
 - (3) Letter Type must be set to Softcopy in order to make available the Define Comm Gen Parameters checkbox (see Part II of the detailed instructions).
- iv) Set Letter Code – use code that will identify office.
- v) Letter Printed Data



- (1) Leave the default of Name/Address Only.
 - vi) Navigation: **Campus Community > Communications > Set up Communications > Standard Letter Table CS**
3. Add a New CONTEXT OR Add LTR to Existing CONTEXT, Select Method and Direction: *[3, 9, 10 – Communication Context Table]*
 - i) Always use the Effective Date of 01/01/1900.
 - ii) Method: Do not modify this field. Values for this field are delivered with your system as translate values.
 - iii) The “Letter” value is required for generating letters.
 - iv) Direction: Incoming or Outgoing
 - v) Navigation: **Campus Community > Communications > Set up Communications > Communication Context Table**
 4. Add a New CATEGORY OR Add Context to Existing CATEGORY
Communication Category *[4 – Communication Category Table]*
 - i) Always use the Effective Date of 01/01/1900.
 - ii) There may be an existing Communication Category associated with the Office/Administrative Function that you wish to use.
 - iii) Navigation: **Campus Community > Communications > Set up Communications > Communication Category Table**
 5. Add a COMMUNICATION SPEED KEY (Comm Key or Speed Key) *[5, 6, 7 – Communication Speed Key Table]*
 - i) There is one Speed Key for each Letter Code.
 - ii) Communication Speed Keys are not required to create communication records; however, *they are required* for using the 3C Engine Event to assign communications.
 - iii) If you assign a letter manually, you do not use the Comm Key.
 - iv) Navigation: **Campus Community > Communications > Set Up Communications > Communication Speed Key Table OR Set Up SACR > Common Definitions > Communications > Communication Speed Key Table**
 6. Add Comm Key to USER DEFAULTS *[8 – User Defaults – Communication Speed Keys]*
 - i) The Communication Speed Key is the only default a user has to set in order to use it.
 - ii) If you make any changes or corrections to the Speed Keys after you assign them to your User Defaults, you will need to add them to your user defaults again. (You will also want to delete the old ones.)
 - iii) Navigation: **Set Up SACR > User Defaults > Communication Speed Keys**
 7. Select Comm 3C GROUP(S) for Security - associate with Category *[11 - 3C Group Security]*



- i) Add/ Update 3C Group.
 - i) Navigation: **Campus Community > Communications > Set up Communications > Communication 3C Groups**
8. Create DATA SOURCE QUERY OR select existing DATA SOURCE QUERY (Communication Data Source Query) *[12 – Data Source Query]* (The “What?” or “from what additional data fields” should the process extract data to merge to the communication?)
- i) The Communication Data Source Query is used to pull in additional data you won’t find in the Pop Select Query.
 - ii) A Bind Record is not needed in the Data Source Query.
 - iii) The Query must be based on the Administrative Function used in the Communication Data Source setup.
 - (1) If you use the GEN Administrative Function, you will not be using any Variable Data Fields in the Data Source Query.
 - (2) However, all the other rules associated with Admin Functions apply.
 - iv) Prompt is required to tie in the query.
 - (1) Minimally, the query must include one query prompt to retrieve a Person ID or Organization ID, or a combination of the two.
 - (2) Your custom queries can only be prompted on fields that can be populated using the Administrative Function key fields, and no others.
 - (3) You do not have to prompt on every key field.
 - v) Don’t build conditional logic into your custom queries.
 - (1) Otherwise you’ll get very strange results in your communications
 - (2) Build good Pop Select queries instead
 - vi) Avoid using Expressions as part of a field or criteria.
 - vii) Validation of any given Data Source Context will be based on the following:
 - (1) *The prompts must be named correctly using the Unique Prompt Name* – Person ID and Organization ID.
 - (a) Validate the Person/Organization Context - Person ID and Organization ID fields:
 - (i) On the Edit Prompt Properties page, change the Unique Prompt Name. BIND 1 is replaced as Unique Prompt Name value
 - 1. Change Person ID fields (e.g. EMPLID), from BIND1 to PERSON_ID
 - 2. Change Organization ID fields (EXT_ORG_ID), from BIND1 to COMMON_ID
 - (2) 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).
 - viii) Note that without a prompt called PERSON_ID or ORG_ID, the query will not be available to a Communication Data Source.



- ix) Navigation: **Reporting Tools > Query > Query Manager**
- 9. Create COMMUNICATION DATA SOURCE OR use existing if appropriate **[13 – Communication Data Source]** (this is the first part of using Comm Gen)
 - i) The Administrative Function drives the fields that are included by default.
 - ii) Data from the Data Source Query is the information at the bottom of the XML file.
 - iii) The Communication Data Source is different from Data Source under BI Publisher.
 - iv) To extract all the possible values for an ID, leave the Max Nbr field blank or you can enter 99.
 - v) If a Custom Extract Data 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.
 - vi) When a change is made to the Communication Data Source, the system re-activates the Register Data Source button. The Data Source must be registered again for the system to accept and use the changes and synchronize it with the PeopleTools record.
 - vii) The Communication Data Source is the XML File that is the main source of the Communication Template
 - viii) Navigation: **Campus Community> Communications> Set Up Communications> Communication Data Source**
- 10. (A) ADD DS QUERY to Comm Data Source, AND (B) REGISTER and SAVE XML FILE **[14 –Download XML File]**
 - i) The Communication 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.
 - ii) 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.
 - iii) Using the Register Data Source button on the bottom of the page automatically stores the Data Source inside the appropriate PeopleTools tables.
 - iv) Important: The Communication Data Source is different from Data Source under BI Publisher.
 - (1) 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.
 - v) When a change is made to the Communication Data Source, including any update to the query or application class, the system re-activates the Register Data Source button.
- 11. CREATE TEMPLATE with Word Add-Ins **[15 – Microsoft Word Template]**
 - i) After the Sample Data (XML file) has been saved, you can open Word.
 - ii) Template Type must be RTF. i.e., you will need to define the communication as an RTF file. If you do not, you can't use it for XML Publisher and Communication Generation.
 - iii) You can use an existing letter as a basis for your template.



- (1) If you have a letter that already has data fields, do not overwrite those fields; rather, copy the text into a new letter.
 - iv) Navigation: **In Word: Select Add-Ins from the Menu. Review Wesleyan documentation for details.**
12. **CREATE BI PUBLISHER REPORT DEFINITION [16, 17 – Report Definition]**
 - i) Use the same name as the Comm Key
 - ii) Data Source Type MUST be XMLDoc Object.
 - iii) Data Source ID is the Communication Data Source name.
 - iv) Template Page:
 - (1) Template Type is RTF.
 - (2) Channel – Select either Email or Printer (for “Letter” you would use Printer). This field MUST be populated.
 - (3) Enter effective date (helpful tip: choose the day before, in case you need to modify your template on the same day after producing ‘live’ communications).
 - v) Output: Leave all Format Types Enabled. Make PDF the Default.
 - vi) Navigation: **Reporting Tools > BI Publisher > Report Definition**
13. **Associate REPORT DEFINITION with LETTER CODE [18 – Letter Code]**
 - i) 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.
 - ii) The 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.
 - iii) Link the Report Definition to the Letter Code by checking the Define Comm Gen Parameters box
 - iv) Navigation: **Main Menu > Campus Community > Communications > Set up Communications > Standard Letter Table CS**
14. **Create PS QUERY [19, 20 – Population Selection Query] (The Who?)**
 - i) Must include the Bind Record associated with the Admin Function. When doing so, you must include (check) all key fields.
 - ii) Must pull in only one row per student.
 - iii) To locate a bind record or query, search for %BND% or %BIND%.
 - iv) Be careful not to use views that are not updated immediately, i.e. some views/records are updated at specific times during the day.
 - v) Re-order your criteria so the prompts are the first criteria. EMPLID must be first.
 - vi) If not using a Pop Select query, do not use 3C Engine.
 - vii) **Reporting Tools > Query > Query Manager**
15. **Add a new EVENT ID [21 – Event Definition]**
 - i) Based on the Comm Key.
 - ii) Navigation: **Campus Community > 3C Engine > Set Up 3C Engine > Event Definition**



16. Select EVENT 3C GROUP(S) for Event ID Security *[22 -Security – Event 3C Groups]*
17. (A) Create a New 3C ENGINE RUN CONTROL (Assign communication), (B) Enter Prompts, AND (C) Run 3C Engine *[23 – Run 3C Engine]*
 - i) Population Selection
 - (1) Selection Tool: PS Query
 - (2) Pop Select Query Name
 - (3) Edit Prompts
 - (4) Preview Selection Results
 - ii) Manage Duplicate Assignment
 - (1) If the query has duplicates in the selection, the duplicate check will not stop the assignment. It only prevents them in future runs.
 - iii) If your query does not appear in the selection box, then there is an issue with the query. Check the prompts.
 - iv) Navigation: **Campus Community > Communications > Run 3C Engine**
18. Add a New COMMUNICATION GENERATION RUN CONTROL *[24 – Communication Generation]*
 - i) Selection Parameters
 - (1) All Person IDs
 - (2) “No valid queries...” message will appear if your Report Definition is not properly set up.
 - ii) Process Parameters
 - (1) Usage Tables
 - (a) Person Communication Usage – address usage table for hierarchy of addresses
 - (b) Cannot send to multiple addresses. Sends to first.
 - (2) Communication Processing Dates
 - (a) Communication Date Range Selection – From Date/To Date
 - (3) Update Communication Generation Date With
 - (4) Update Communication Complete Date With
 - (5) Output Settings
 - (6) Missing Critical Data
 - iii) Email Parameters
 - (1) Note: If running in Test environment, emails will go out.
 - iv) Checklist Parameters (not currently used)
 - v) Navigation: **Campus Community > Communications > Communication Generation**
19. POP SELECT PROMPTS (Population Selection , click Edit Prompts) *[25]*
 - i) Navigation: **Campus Community > Communications > Run 3C Engine**
20. ADMIN FUNCTION VARIABLES *[26]*
 - i) Navigation: **Setup SACR > Common Definitions > Administrative Function Table**



21. VERIFY OUTPUT: (A) View Query (B) AND/OR Person Communication [27 - *Person Communication*]

- i) Person Communication – Use to View what was generated by 3C Engine
 - (1) View what was actually sent to recipient
 - (2) Template is regenerated each time. File is not saved.
 - (3) Dates that communications were sent are preserved based on effective date.
 - (4) Navigation: Campus Community > Communications > Person Communications > Communication Management

And/or run PS Query based on Communication Table such as WES_COMMGEN_PERSON_TBL or WES_COMM_TBL_PROMPT_LTR_DATE