

W E S L E Y A N
U N I V E R S I T Y



Student Faculty Information System

PeopleSoft Comm Gen

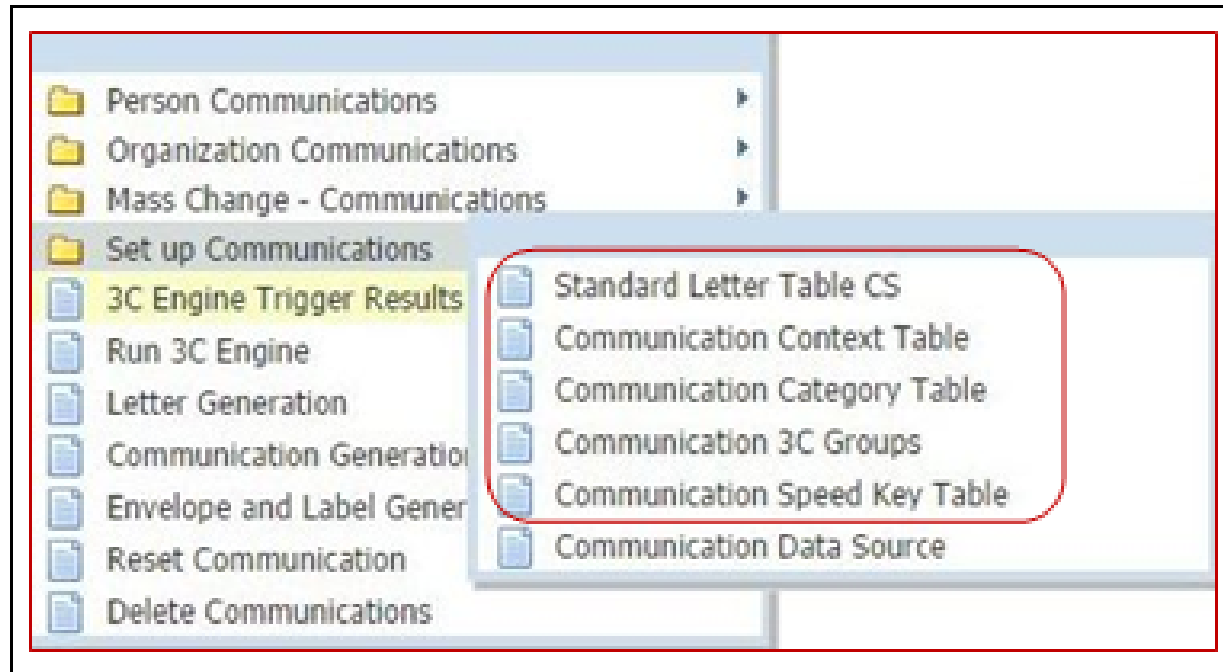
Screen Shots From

[Managing Communications – Comm Gen Part I](#)

[Defining and Assigning Communications – Comm Gen Part II](#)

Set up Communication Steps

Campus Community > Communications > Set up Communications



List of Admin Functions

Setup SACR > Common Definitions > Administrative Function Table

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

Administrative Function Table

*Click on Link to Function
(example: SFAC)*

Administrative Function Table

Administrative Function: **SFAC**

Description		Find	View All	First	1 of 1	Last
*Effective Date:	01/01/1900	*Status:	Active	Variable Data + -		
*Description:	Student Financials Account					
Short Description:	Fin Acct					
<input checked="" type="checkbox"/> Admin Function - People		<input checked="" type="checkbox"/> Admin Function - Organizations				

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

Administrative Function Field Usage

Click on Variable Data Button

(example: SFAC)

Administrative Function Field Usage

Variable Key Usage

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

Return

Standard Letter Table

***Campus Community > Communications > Set up Communications > Standard Letter Table CS
(not filled in)***

Standard Letter Table

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

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


▼ Search Criteria

Letter Code:

Set Letter Code:

Description:

Case Sensitive

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

Standard Letter Table

(Add a New Value)

Standard Letter Table

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

Letter Code:

[Add](#)

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

Standard Letter Table

(filled in – except for Define Comm Gen Parameters)

Favorites | Main Menu > Campus Community > Communications > Set up Communications > Standard Letter Table CS

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

Communication Context Table

Campus Community > Communications > Set up Communications > Communication Context Table (Search page)

Communication Context Table

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

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


▼ Search Criteria

Academic Institution: [= ▼] 🔍

Communication Context: [begins with ▼]

Description: [begins with ▼]

Include History Correct History Case Sensitive

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

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

Communication Context Table

(Add a New Value)

Communication Context Table

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

Academic Institution:

Communication Context:

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

Communication Context Table

(Filled In)

Favorites | Main Menu > Campus Community > Communications > Set up Communications > Communication Context Table

Communication Context

Academic Institution: WSLYN Wesleyan University
Communication Context: SPRCLT

Communication Context Description End | View All First 1 of 1 Last

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

*Description: Pre-Collect Letters

Short Desc: Pre-Coll

*Method	*Direction	Letter Code	Description
Letter	Outgoing Communication	S4E	Pre-Collect - Student has left

Communication Category Table

(Search Page)

Communication Category Table

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

▼ Search Criteria

Academic Institution:

Communication Category: begins with

Description: begins with

Administrative Function: begins with

Include History
 Correct History
 Case Sensitive

[Basic Search](#)

Search Results

View All	Academic Institution	Communication Category	Description	Administrative Function
	WSLYN	EASIMN	Financial Aid - SIMON	ADMP
	WSLYN	GLADVS	GLS Academic Advising Review	SPRG
	WSLYN	GLPREG	Pre-Graduate Letters	SPRG
	WSLYN	GLSA	GLS Student Account Balance	SFAC
	WSLYN	GLSACT	GLS Student Accounts	GEN
	WSLYN	GLSTSV	Student Services Communication	GEN
	WSLYN	BECKIS	IELTS/Inter/En/Lang/Test/Score	PROP
	WSLYN	SFACCT	Student Accounts Overall	SFAC
	WSLYN	SFCOL	Collections	SFAC
	WSLYN	SFCOLL	SF Collections	SFCO
	WSLYN	SFENBL	Student Accounts Enrollment	SENB
	WSLYN	SFGEN	Student Account General	GEN
	WSLYN	SFHLD	Enrollment Holds	SFAC

First 1-41 of 41 Last

Communication Categories

(Filled In)

Navigation: Favorites | Main Menu > Campus Community > Communications > Set up Communications > Communication Category Table

Communication Categories

Academic Institution: WSLYN Wesleyan University
Communication Category: SBALNC

Communication Category Description

End | View All | First 1 of 1 Last

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

*Description: Student Accounts Balances

Short Description: SAO Balanc

*Function: GEN General

Communication Context	
*Context	Description
SPRCLT	Pre-Collect Letters

Add

Save | Return to Search | Previous in List | Next in List | Notify | Add | Update/Display | Include History | Correct History

Communication 3C Groups

Campus Community > Communications > Set up Communications > Communication 3C Groups (Security)

Favorites Main Menu > Campus Community > Communications > Set up Communications > Communication 3C Groups

Communication 3C Groups

Institution: WSLYN Wesleyan University
Category: SBALNC Student Accounts Balances
Function: General

Update/Inquiry Group

*Group	Description
SF	Student Financials

Communication Speed Key Table

Campus Community > Communications > Set Up Communications > Communication Speed Key Table (Search for Admin Function)

Communication Speed Key Table

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

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

▼ Search Criteria

Academic Institution:

Administrative Function:

[Basic Search](#)

Search Results

[View All](#) [First](#) [Last](#)

Academic Institution	Administrative Function
WSLYN	ADMP
WSLYN	EVNT
WSLYN	GEN
WSLYN	PROP
WSLYN	SENR
WSLYN	SFAC
WSLYN	SFPA
WSLYN	SPRG

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

Communication Speed Keys (Filled In)

Favorites | Main Menu > Campus Community > Communications > Set up Communications > Communication Speed Key Table

Communication Speed Keys

Institution: WSLYN Wesleyan University
Function: GEN General

Comm Key Detail End | View All First 38 of 43 Last

*Comm Key: S4E Print Comment

*Description: Pre-Collect - Student has left Activity Completed

Short Desc: PreCol S4E Unsuccessful Outcome

*Category: SBALNC Student Accounts Balances

*Context: SPRCLT Pre-Collect Letters

Duration:

*Method: L Letter Direction: OUT Letter Code: S4E

Comments:

User Defaults

***Set Up SACR > User Defaults > Communication Speed Keys
(Not Filled In)***

User ID: Name:

Administrative Function Find | View All First 3 of 4 Last

*Academic Institution: WSLYN Wesleyan University + -

*Administrative Function: Default Comm Key: No Default

Comm Key Find | View All First 1 of 1 Last

*Comm Key: Default Comm Key + -

Description: Print Comment

Short Desc: Activity Completed

Category: Unsuccessful Outcome

Context:

Duration:

Method: Direction: Letter Code:

Comment:

User Defaults

Set Up SACR > User Defaults > Communication Speed Keys (Filled In)

Favorites | Main Menu > Set Up SACR > User Defaults

User Defaults 4 | Enrollment Override Defaults | **Communication Speed Keys** | User 3C Groups Summary | UCAS, GTTR De

User ID: CPIKE01 Name: Pike, Carolyn

Administrative Function Find | View All First 2 of 3 Last

*Academic Institution: WSLYN Wesleyan University + -

*Administrative Function: GEN Default Comm Key: No Default

Comm Key Find | View All First 2 of 3 Last

*Comm Key: S4E Default Comm Key + -

Description: Pre-Collect - Student has left Print Comment

Short Desc: PreCol S4E Activity Completed

Category: SBALNC Student Accounts Balances Unsuccessful Outcome

Context: SPRCLT Pre-Collect Letters

Duration:

Method: L Letter Direction: OUT Letter Code: S4E

Comment:

Save Notify

User Defaults 1 | User Defaults 2 | User Defaults 3 | **User Defaults 4** | Enrollment Override Defaults | Communication Speed Keys | User 3C Gr

Data Source (DS) Query

Unique Prompt Name – PERSON_ID
Edited Prompt Properties - EMPLID

Original Prompt Properties – EMPLID	Edited Prompt Properties – EMPLID
<p>Edit Prompt Properties</p> <p>Field Name: EMPLID</p> <p>*Heading Type: RFT Short</p> <p>*Type: Character</p> <p>*Format: Upper</p> <p>Length: 11 Decimals:</p> <p>*Unique Prompt Name: BIND1</p> <p>*Edit Type: No Table Edit</p> <p>Prompt Table:</p> <p>OK Cancel</p>	<p>Edit Prompt Properties</p> <p>Field Name: EMPLID</p> <p>*Heading Type: RFT Short</p> <p>*Type: Character</p> <p>*Format: Upper</p> <p>Length: 11 Decimals:</p> <p>*Unique Prompt Name: PERSON_ID</p> <p>*Edit Type: No Table Edit</p> <p>Prompt Table:</p> <p>OK Cancel</p>

Data Source (DS) Query

Unique Prompt Name

Edited Prompt Properties – Variable Data Field

Original Prompt Properties – Variable Data Field	Edited Prompt Properties – Variable Data Field
<p>Edit Prompt Properties</p> <p>Field Name: <input type="text" value="ACCOUNT_TERM"/></p> <p>*Heading Type: <input type="text" value="RFT Short"/></p> <p>*Type: <input type="text" value="Character"/></p> <p>Heading Text: <input type="text" value="Acct Term"/></p> <p>*Format: <input type="text" value="Number Only"/></p> <p>*Unique Prompt Name: <input type="text" value="BIND1"/></p> <p>Length: <input type="text" value="4"/></p> <p>Decimals: <input type="text" value=""/></p> <p>*Edit Type: <input type="text" value="Prompt Table"/></p> <p>Prompt Table: <input type="text" value="TERM_VAL_TBL"/></p> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/></p>	<p>Edit Prompt Properties</p> <p>Field Name: <input type="text" value="ACCOUNT_TERM"/></p> <p>*Heading Type: <input type="text" value="RFT Short"/></p> <p>*Type: <input type="text" value="Character"/></p> <p>Heading Text: <input type="text" value="Acct Term"/></p> <p>*Format: <input type="text" value="Number Only"/></p> <p>*Unique Prompt Name: <input type="text" value="ACCOUNT_TERM"/></p> <p>Length: <input type="text" value="4"/></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>

Communication Data Source

***Campus Community > Communications > Set Up Communications > Communication Data Source
(Search for Administrative Function)***

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

Description: begins with

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

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

Communication Data Source

Campus Community > Communications > Set Up Communications > Communication Data Source (Existing Data Source)

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

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

Communication Data Source

***Campus Community > Communications > Set Up Communications > Communication Data Source
(Adding a New Data Source – Top of Page)***

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

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 First 1 of 1 Last

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

Custom Extract Data First 1 of 1 Last

Sequence	Type	Query Name	Max Nbr	Application Class	
1	Query		<input type="button" value="Q"/>		<input type="button" value="+"/> <input type="button" value="-"/>

Registered Date/Time Registered By

Last Update Date/Time Last Update User ID

Communication Data Source

(Adding a New Data Source – Top and Middle of Page)

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

Communication Data Source

*Data Source Map ID:
Description:
Owner ID:
Data Source Type: XMLDoc Object Active

Data Source Context

*Administrative Function: General Person Organization

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

Custom Extract Data			
Sequence	Type	Query Name	Max Nbr
<input type="text" value="1"/>	<input type="text" value="Query"/>	<input type="text"/>	<input type="text"/>

Registered Date/Time: _____ Registered By: _____
Last Update Date/Time: _____ Last Update User ID: _____

Communication Data Source

(Adding a New Data Source Query Name)

- 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:

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

Data Source Context

*Administrative Function: GEN | 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	WSF_DS_NET_ACCT_BAL	99	

Communication Data Source

(Custom Extract Query, View and Download XML File, and Register the Data Source)

The screenshot shows a web application interface for managing 'Custom Extract Data'. At the top, there is a search bar with 'Find' and '1 of 1' results. Below this is a table with the following data:

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

Below the table, there are two rows of metadata:

- Registered Date/Time: 03/09/15 11:16:54AM
- Registered By: CPIKE01
- Last Update Date/Time: 04/06/15 2:38:52PM
- Last Update User ID: CPIKE01

There is a blue link labeled 'View/Download Sample Data File' and a grey button labeled 'Register Data Source'. At the bottom, there are navigation buttons: 'Return to Search', 'Previous in List', 'Next in List', and 'Add'.

Annotations in red circles and lines point to specific elements:

- 'Register the Data Source' points to the 'Register Data Source' button.
- 'Custom Extract Query or Queries' points to the 'Query Name' field in the table.
- 'View and Download XML File' points to the 'View/Download Sample Data File' link.

Communication Data Source (XML File Top and Bottom)

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>samp</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>
```

```
- <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>
```

Communication Data Source (Completed Page with Multiple Queries)

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

Communication Data Source

*Data Source Map ID:
Description:
Owner ID:
Data Source Type: XMLDoc Object Active

Data Source Context

*Administrative Function: Prospect Program 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 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_SAL_INT	<input type="checkbox"/>

Custom Extract Data

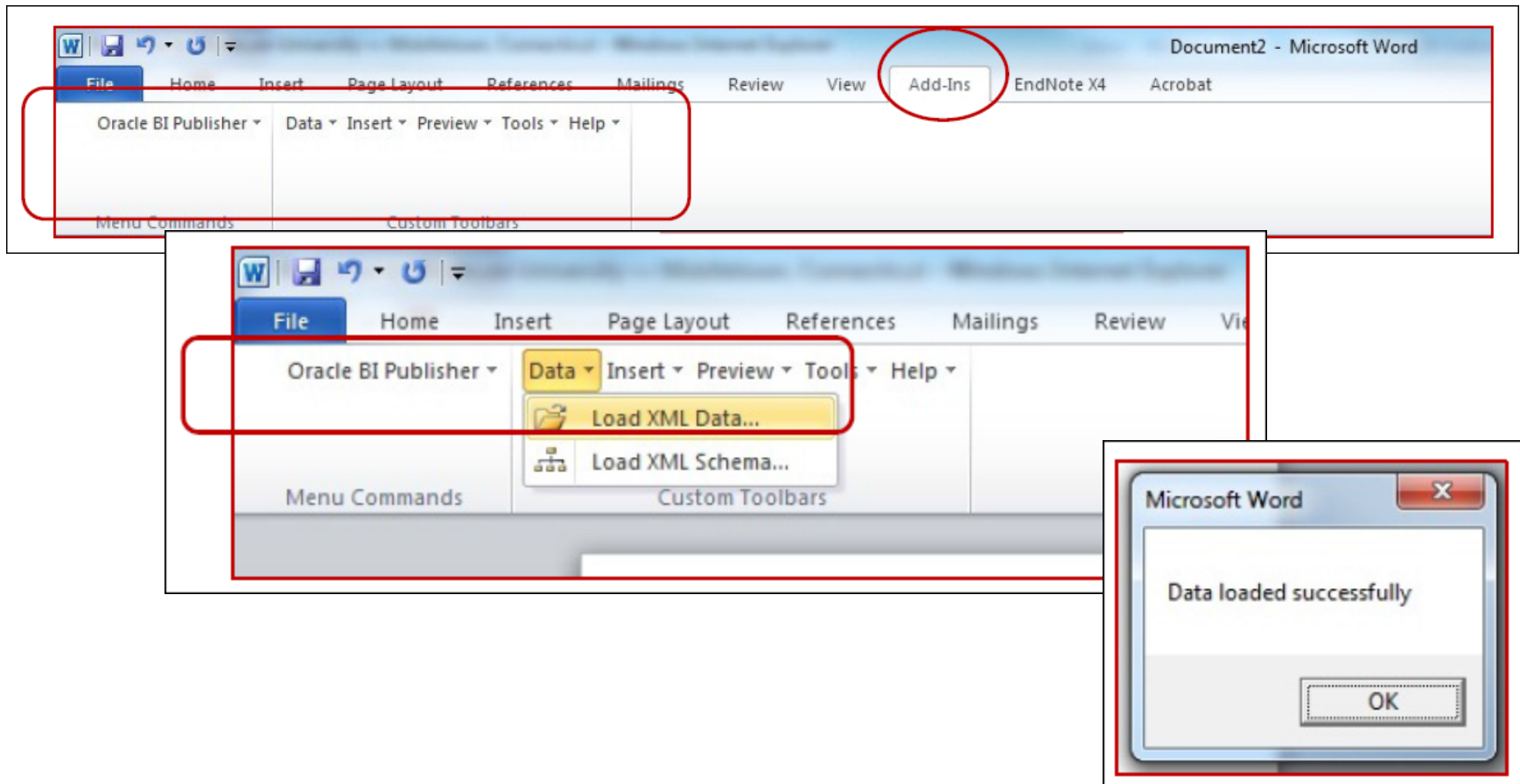
Sequence	Type	Query Name	Max Nbr	Application Class
1	Query	WADDS_VAR_CITIZENSHIP	99	
2	Query	WADDS_VAR_ETHNICITY	99	
3	Query	WADDS_VAR_PHONE	1	

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](#)

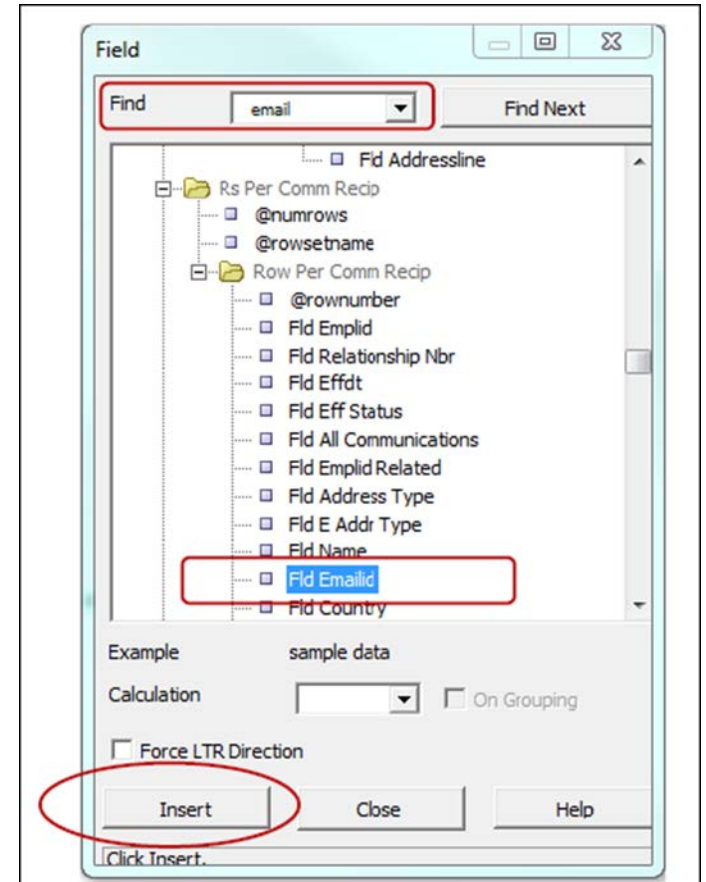
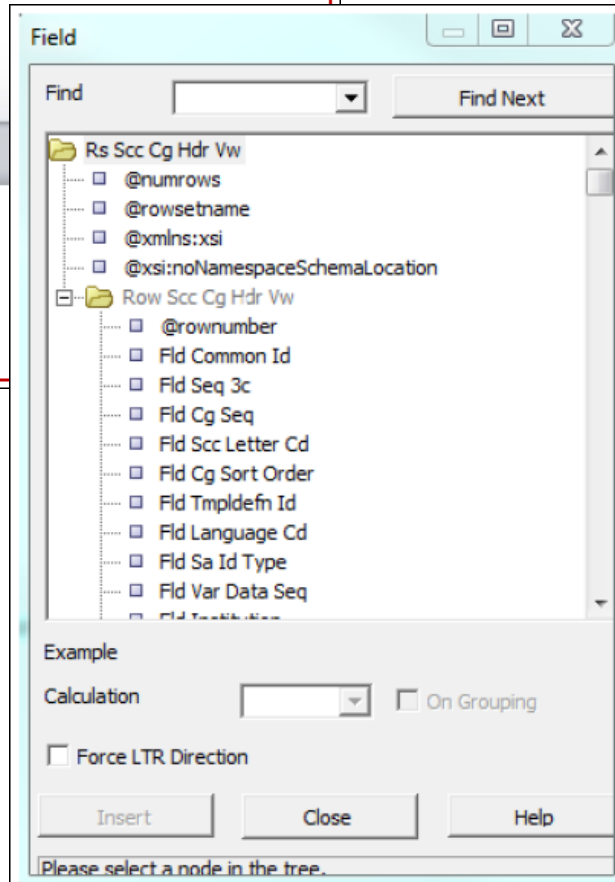
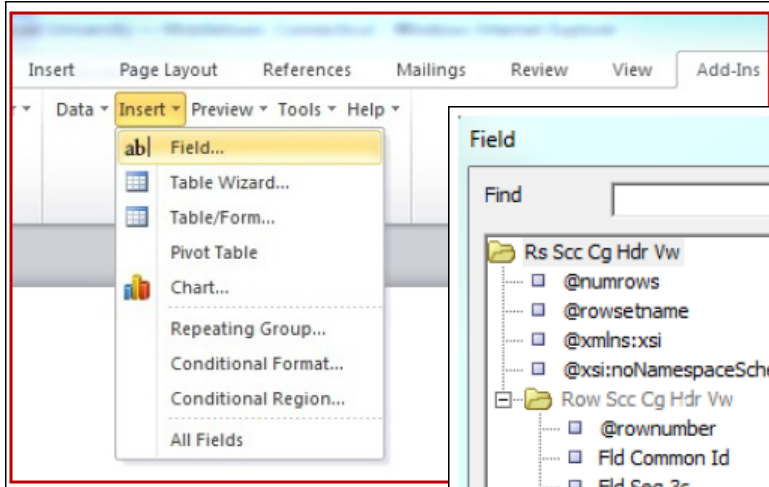
Microsoft Word Template (After saving XML File) Open Word and Load the Sample Data

Add-Ins > Data > Data > Load XML Data



Microsoft Word Template (Add Variable Fields)

Insert > Field



Microsoft Word Template (Add Variable Fields)

Add Fields to Letter and Validate Template

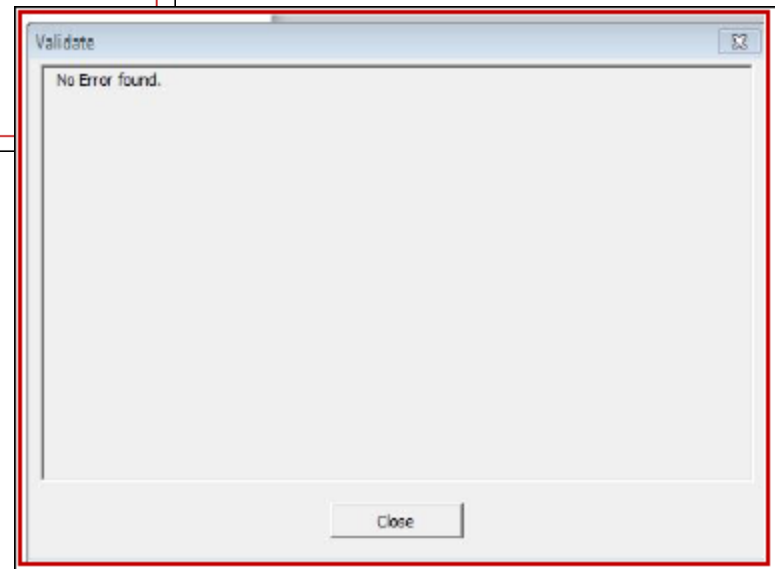
fld_EMAILID

fld_NAME
fld_ADDRESS1
fld_CITY, fld_STATE fld_POSTAL
fld_COUNTRY_DESCR

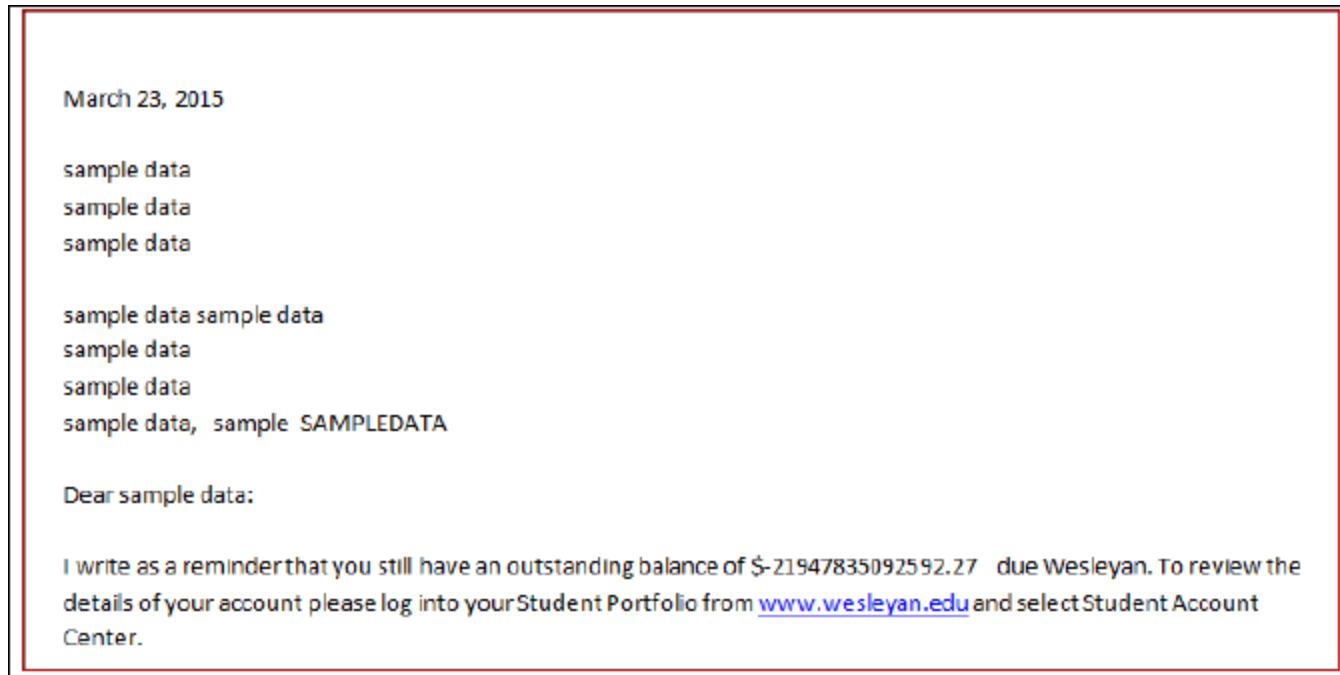
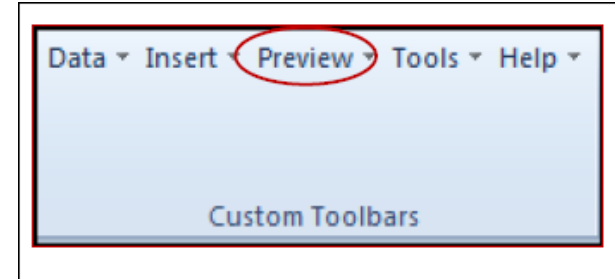
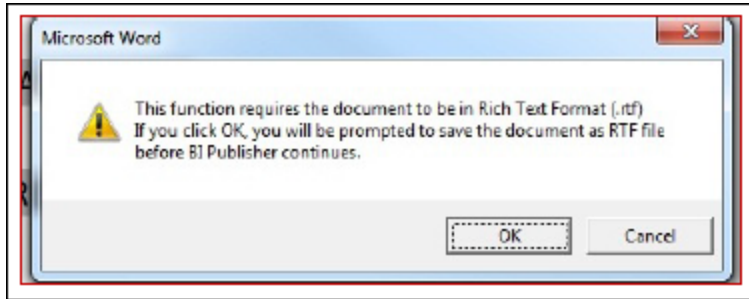
Dear Student:

You currently have an account balance of fld_DUE_AMT which was due on fld_DUE_DT.

Please contact us regarding this.



Microsoft Word Template (Save Template as RTF and Preview Template)



Report Definition

Main Menu > Reporting Tools > BI Publisher > Report Definition

Add New Value on Report Definition Page

Favorites Main Menu > Reporting Tools > BI Publisher > Report Definition

Report Definition

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

Report Name:

*Data Source Type: ▼

Data Source ID: 🔍

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

Report Definition

Enter Report Properties Under Definition Tab

Favorites Main Menu > Reporting Tools > BI Publisher > Report Definition

Definition Template Output Properties Security Eursting

Report Name: S4E

Data Source

Data Source Type: XMLDoc Object
Data Source ID: WSF_GENERAL_DATA_SOURCE
Data Source Description: WSF General Data Source

Report Properties

Report Description: Pre-Collect - Student has left

*Report Status: Active

*Report Category ID: CATEGORY 1 Report Category 1

Owner ID: PeopleTools

*Template Type: RTF

Retention Days:

Registered Date/Time: 03/09/2015 11:55:04AM Registered By: CPIKE01
Updated Date/Time: 03/09/2015 1:55:50PM Updated By: CPIKE01

Download: [Data Schema](#) [Sample Data](#)

Return to Search Previous in List Next in List Add Update/Display Include History Correct History

Save

Report Definition

Associate Template with Definition

Favorites | Main Menu > Reporting Tools > BI Publisher > Report Definition

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

Report Name: S4E

Template Find | View All First 1 of 1 Last

Template ID: S4E_1 Default Template + -

Description: S4E_Pre_Collect_StudentLeft

*Language Code: English Channel: Printer

Template Files Find | View All First 1 of 1 Last

Effective Date: 03/09/2015 + -

*Status: Active Use Data Transform

Template File: [S4E_Pre_Collect_StudentLeft.rf](#) Upload Preview Use Alt XML

Return to Search | Previous in List | Next in List | Add | Update/Display | Include History | Correct History

Save

Report Definition

Upload Template

Favorites Main Menu Reporting Tools BI Publisher Report Definition

Definition Template Output Properties Security Bursting

Report Name: S4E

Template Find | View All First 1 of 1 Last

Template ID S4E_1 Default Template

Description S4E_Pre_Collect_StudentLeft

*Language Code English Channel Printer

Template Files Find | View All First 1 of 1 Last

Effective Date 03/23/2015


*Status Active Use Data Transform

Template File S4E_Pre_Collect_StudentLeft.rtf Upload Preview Use Alt. XML

Return to Search Previous in List Next in List Add Update/Display Include History Correct History

Save

Report Definition Preview Template

<p>WESLEYAN UNIVERSITY</p> <hr/> 
<p>Student Accounts Office 237 High Street Middletown, CT 06459 P: (860) 685-2800 F: (860) 685-4669 student-accounts@wesleyan.edu</p>
<p>March 23, 2015</p>
<p>sample data sample data sample data</p>
<p>sample data sample data sample data sample data sample data, sample SAMPLEDATA</p>
<p>Dear sample data:</p>
<p>I write as a reminder that you still have an outstanding balance of \$-21947835092592.27 due Wesleyan. To</p>

Report Definition

Verify or Define Information on Output Tab

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

Report Definition

Verify or Define Information on Properties Tab

Report Name: SFACTSF1

Report Properties

Property Group: PDF Security

Property Settings

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

Add Update/Display Include History Correct History

Save

Create or Adjust Letter Code

Campus Community > Communications > Set up Communications >
Standard Letter Table CS
(Associate Report Definition with 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

Letter Type must be set to Softcopy in order to make available the Define Comm Gen Parameters checkbox

Create or Adjust Letter Code

Define Comm Gen Parameters

Favorites | Main Menu > Campus Community > Communications > Set up Communications > Standard Letter Table CS

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

Template Selection

Find | View All First 1 of 1 Last

[Report Name](#) [View Report Definition](#)

Data Source ID

Template List

Personalize | Find | First 1 of 1 Last

Template ID	Description	Language	Method	Default Template
				<input type="checkbox"/>

Create or Adjust Letter Code

Select Report Name

The screenshot displays a 'Template Selection' window. The top section shows the selected report name 'S4E' with the description 'Pre-Collect - Student has left' and the data source 'WSF_GENERAL_DATA_SOURCE'. A callout box labeled 'Report Name (Definition)' points to the 'Report Name' field. Below this, a 'Template List' table is shown with one entry: 'S4E_1' with description 'S4E_Pre_Collect_StudentLeft', language 'English', method 'Letter', and a checked 'Default Template' box. A callout box labeled 'Data Source' points to the 'Data Source ID' field.

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

Pop Select Query

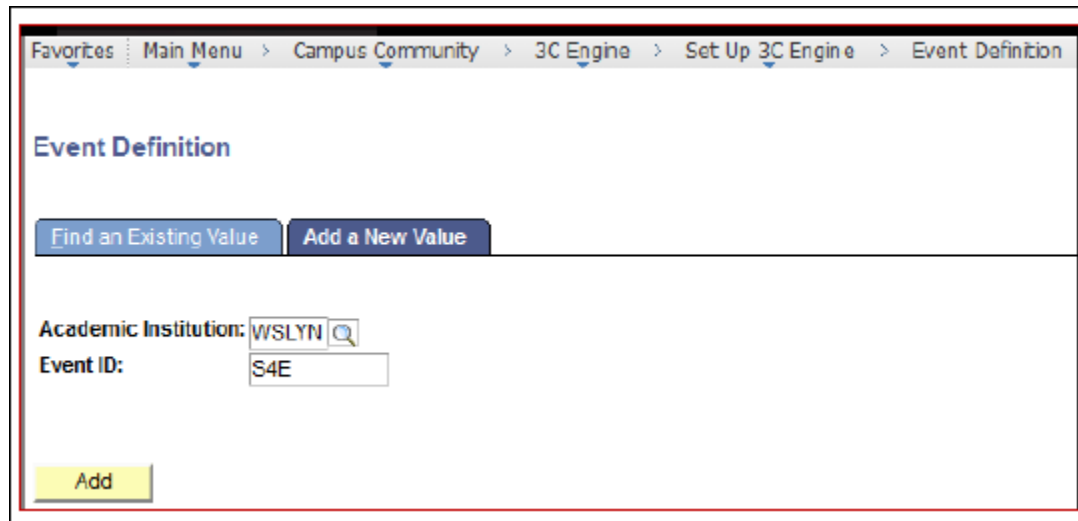
Population Selection Bind for SFAC - Person

A SCC_PS_SFACP_BN - Pop Sel Bind for SFAC - Person [Hierarchy Join](#)

Fields		Find View All	First	1-6 of 6	Last
<input checked="" type="checkbox"/>	BUSINESS_UNIT - Business Unit				
<input checked="" type="checkbox"/>	EMPLID - Empl ID	Join PEOPLE_SRCH - People Search View			
<input type="checkbox"/>	ACCOUNT_NBR - Account Nbr				
<input type="checkbox"/>	ACCOUNT_TERM - Account Term	Join TERM_VAL_TBL - Term Value Table			
<input checked="" type="checkbox"/>	INSTITUTION - Academic Institution				
<input type="checkbox"/>	NAME - Name				

Event Definition

Campus Community > 3C Engine > Set Up 3C Engine > Event Definition
(Add a New Value)



The screenshot shows a web browser window with a breadcrumb trail: Favorites | Main Menu > Campus Community > 3C Engine > Set Up 3C Engine > Event Definition. The page title is "Event Definition". Below the title are two buttons: "Find an Existing Value" and "Add a New Value". The "Add a New Value" button is selected. Below the buttons are two input fields: "Academic Institution:" with the value "WSLYN" and a search icon, and "Event ID:" with the value "S4E". At the bottom left is a yellow "Add" button.

Event Definition

(Completed Page)

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

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
[Variable Data Joint Rules](#)

*Function: GEN General

Communications

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

Comments

*Comment Category: Detail

Checklists

*Checklist Code: Detail Update Status

Event Definition

Comm Key Detail

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

Event 3C Groups

Campus Community > 3C Engine > Set Up 3C Engine > Event 3C Groups
(Security Associated with Event ID)

Navigation: 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	+	-

Buttons: Save | Return to Search | Notify | Refresh

Run 3C Engine

Campus Community > Communications > Run 3C Engine
(Add a New Value)

The screenshot displays a web browser window with the following elements:

- Breadcrumbs:** Favorites | Main Menu > Campus Community > Communications > Run 3C Engine
- Section Header:** 3C Engine
- Instruction:** Enter any information you have and click Search. Leave fields blank for a list of all values.
- Navigation Buttons:** Find an Existing Value (highlighted in blue), Add a New Value (highlighted in blue)
- Search Criteria Section:** Search Criteria (dropdown menu)
- Run Control ID:** begins with (dropdown menu) [input field]
- Case Sensitive:** Case Sensitive
- Action Buttons:** Search (highlighted in yellow), Clear (highlighted in yellow), [Basic Search](#), [Save Search Criteria](#) (with a document icon)

Run 3C Engine

3C Engine Parameters

(Not Yet Filled In)



Run 3C Engine

3C Engine Parameters

(After checking Population Selection)

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	Process Joint Records
<input checked="" type="checkbox"/> Population Selection <input type="checkbox"/> Trigger Table <input type="checkbox"/> Mass Change	<input checked="" type="radio"/> No <input type="radio"/> Yes, all Joint IDs <input type="radio"/> Yes, if match exists

Event Selection

Academic Institution: [Wesleyan University](#)

Administrative Function:

Event ID: [Detail](#)

Communication Key

Checklist Code

Comment Category

Population Selection

Selection Tool:

Query Name:

[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Update/Display](#)

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

Run 3C Engine

3C Engine Parameters

(Filled In)

The screenshot shows a web interface for the 3C Engine. At the top, there are two tabs: '3C Engine Parameters' (highlighted with a red box) and 'Manage Duplicate Assignment'. Below the tabs, the 'Run Control ID' is 'S4E'. There are three links: 'Report Manager', 'Process Monitor', and a yellow 'Run' button. The interface is divided into several sections:

- Process 3Cs:** Contains three checkboxes: 'Population Selection' (checked), 'Trigger Table' (unchecked), and 'Mass Change' (unchecked).
- Process Joint Records:** Contains three radio buttons: 'No' (selected), 'Yes, all Joint IDs' (unchecked), and 'Yes, if match exists' (unchecked).
- Event Selection:** Contains search fields for 'Academic Institution' (WSLYN, Wesleyan University), 'Administrative Function' (GEN, General), and 'Event ID' (S4E, Pre-Collect - Student has left). A blue 'Detail' link is circled in red next to the Event ID.
- Communication Key:** A dropdown menu showing 'S4E' and 'Pre-Collect - Student has left'.
- Checklist Code:** A dropdown menu.
- Comment Category:** A dropdown menu.
- Population Selection:** Contains a 'Selection Tool' dropdown menu and a 'Query Name' text input field.

Run 3C Engine

3C Engine Parameters

(Population Selection Area Filled In)

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: Wesleyan University

Administrative Function: General

Event ID: Pre-Collect - Student has left [Detail](#)

Communication Key

S4E Pre-Collect - Student has left

Checklist Code

Comment Category

Population Selection

Selection Tool: [Edit Prompts](#)

Query Name: [Launch Query Manager](#) [Preview Selection Results](#)

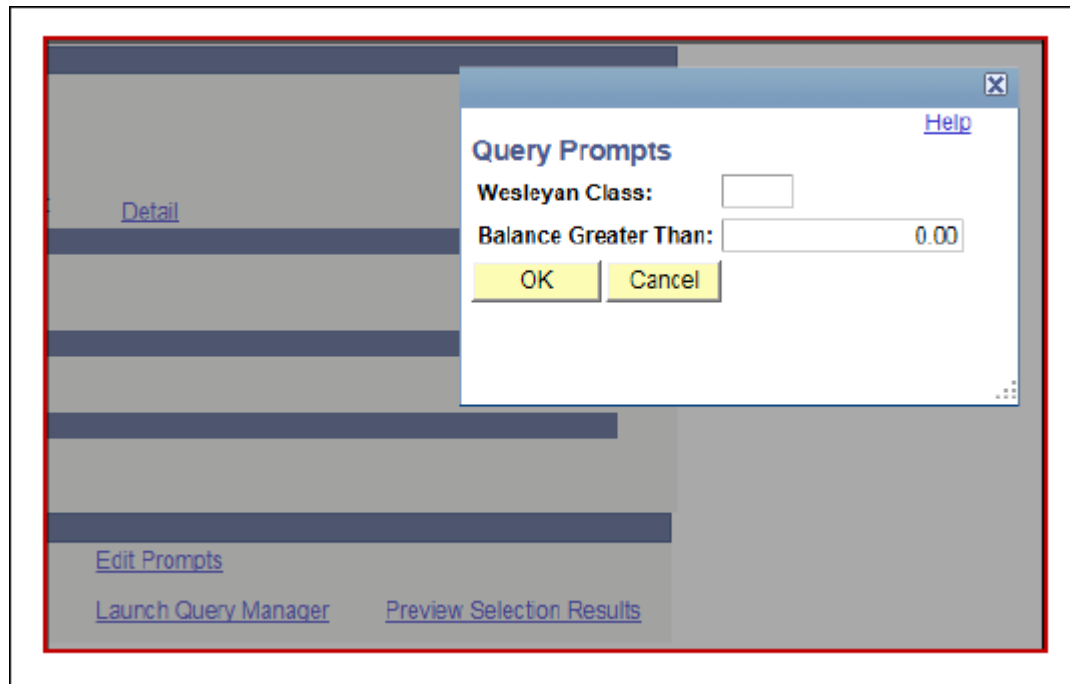
[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Update/Display](#)

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

Run 3C Engine

3C Engine Parameters

(Population Selection Area – Query Prompts)



Run 3C Engine

3C Engine Parameters

Manage Duplicate Assignment

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](#)

Duplicate Communication Check

Check Duplicate Communication [Explain](#)

Additional Conditions to Prevent Duplicate Communication

Variable Data: [Explain](#)

Communication Status: [Explain](#)

Duplicate Checklist Check

Check Duplicate Checklist [Explain](#)

Additional Conditions to Prevent Duplicate Checklist

Variable Data: [Explain](#)

Checklist Status: [Explain](#)

[Save](#) [Return to Search](#) [Notify](#)

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

Communication Generation

Campus Community > Communications > Communication Generation Selection Parameters

Navigation: Favorites | Main Menu > Campus Community > Communications > Communication Generation

Buttons: Selection Parameters | Process Parameters | Email Parameters | Checklist Parameters

Run Control ID: S4E Report Manager Process Monitor Run

ID Selection

ID Selection: All Person IDs

Letter Code Selection

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

Template Selection

Report Name: S4E Pre-Collect - Student has left View Report Definition

Data Source ID: WSF_GENERAL_DATA_SOURCE

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

Enclosures Assigned (Softcopy)

No Matching Template Found

Use Default Template Do Not Produce Communication Refresh Enclosure List

Communication Language Usage

Specified Language: English

Preferred

Communication Method Usage

Specified Method: Letter

Preferred

Save Return to Search Notify Add Update/Display

Selection Parameters | Process Parameters | Email Parameters | Checklist Parameters

Communication Generation

Campus Community > Communications > Communication Generation Process Parameters

Favorites Main Menu > Campus Community > Communications > Communication Generation

Selection Parameters **Process Parameters** Email Parameters Checklist Parameters

Run Control ID: 94E [Report Manager](#) [Process Monitor](#) [Run](#)

Usage Tables	Communication Processing Dates
Person Communication Usage Address: Basic Usage MAIL_HOME Address Name: First Name Last Name Salutation: First Name Extra Name: First Name Last Name	Communication Date Range Selection *From Date: 03/09/2015 *To Date: 03/09/2015
Joint Salutation Usage Joint Name:	Update Communication Generation Date With <input type="radio"/> Communication Date <input checked="" type="radio"/> System Date <input type="radio"/> User Supplied Date
Org Communication Usage Org Recipient: Organization Mail Contact Name: First Name	Update Communication Completed Date With <input type="radio"/> Communication Date <input checked="" type="radio"/> System Date <input type="radio"/> User Supplied Date
Output Settings *Sort Option: Country, Postal <input checked="" type="checkbox"/> Online Preview <input type="checkbox"/> Send to Printer <input type="checkbox"/> Send to File <input type="checkbox"/> Create Envelopes <input type="checkbox"/> Create Labels	
Missing Critical Data <input checked="" type="checkbox"/> Produce Communication <input checked="" type="checkbox"/> Complete Communication	

[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Update/Display](#)