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

![Diagram showing setup steps for communication](image-url)
## List of Admin Functions

*Setup SACR > Common Definitions > Administrative Function Table*

<table>
<thead>
<tr>
<th>Administrative Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADM A</td>
<td>Admissions Application</td>
</tr>
<tr>
<td>ADM P</td>
<td>Admissions Program</td>
</tr>
<tr>
<td>AVAK</td>
<td>Advancement Acknowledgements</td>
</tr>
<tr>
<td>AVIN</td>
<td>Advancement Initiatives</td>
</tr>
<tr>
<td>AVMB</td>
<td>Advancement Member Benefit</td>
</tr>
<tr>
<td>AVMS</td>
<td>Advancement Membership</td>
</tr>
<tr>
<td>AWRD</td>
<td>Awarding</td>
</tr>
<tr>
<td>BDGT</td>
<td>Budget Maintenance</td>
</tr>
<tr>
<td>CASN</td>
<td>CAS Notification</td>
</tr>
<tr>
<td>EVNT</td>
<td>Event</td>
</tr>
<tr>
<td>FINA</td>
<td>Financial Aid</td>
</tr>
<tr>
<td>GEN</td>
<td>General</td>
</tr>
<tr>
<td>HC</td>
<td>International Health Coverage</td>
</tr>
<tr>
<td>ISIR</td>
<td>ISIR Corrections</td>
</tr>
<tr>
<td>LOAN</td>
<td>Loan</td>
</tr>
<tr>
<td>NLBP</td>
<td>Internships NLD</td>
</tr>
<tr>
<td>NLOW</td>
<td>Educational contracts NLD</td>
</tr>
<tr>
<td>PROP</td>
<td>Prospect Program</td>
</tr>
<tr>
<td>PROS</td>
<td>Prospect</td>
</tr>
<tr>
<td>PSSV</td>
<td>Prospect Self Service</td>
</tr>
<tr>
<td>RECR</td>
<td>Recruiters</td>
</tr>
<tr>
<td>RSTR</td>
<td>Restricted Aid</td>
</tr>
<tr>
<td>SENR</td>
<td>Student Enrollment</td>
</tr>
<tr>
<td>SFAC</td>
<td>Student Financials Account</td>
</tr>
<tr>
<td>SFBI</td>
<td>Student Financials Billing</td>
</tr>
<tr>
<td>SFCO</td>
<td>Student Financials Collections</td>
</tr>
<tr>
<td>SFRG</td>
<td>Student Financials Groups</td>
</tr>
<tr>
<td>SFIT</td>
<td>Student Financials Item Lines</td>
</tr>
<tr>
<td>SFPA</td>
<td>Student Financials Payments</td>
</tr>
<tr>
<td>SFPR</td>
<td>Student Financials Promise</td>
</tr>
<tr>
<td>SFRC</td>
<td>Student Financials Receipt</td>
</tr>
<tr>
<td>SFRF</td>
<td>Student Financials Refund</td>
</tr>
<tr>
<td>SFTP</td>
<td>Student Financials Contracts</td>
</tr>
<tr>
<td>SPRG</td>
<td>Student Program</td>
</tr>
</tbody>
</table>
### Administrative Function Table

*Click on Link to Function*

*(example: SFAC)*

<table>
<thead>
<tr>
<th>Description</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Administrative Function:</strong></td>
<td>SFAC</td>
</tr>
<tr>
<td><strong>Effective Date:</strong></td>
<td>01/01/1900</td>
</tr>
<tr>
<td><strong>Status:</strong></td>
<td>Active</td>
</tr>
<tr>
<td><strong>Description:</strong></td>
<td>Student Financials Account</td>
</tr>
<tr>
<td><strong>Short Description:</strong></td>
<td>Fin Acct</td>
</tr>
</tbody>
</table>

- Admin Function - People
- Admin Function - Organizations

**Buttons:**
- Save
- Return to Search
- Notify
- Update/Display
- Include History
- Correct History
Administrative Function Field Usage

*Click on Variable Data Button*

*(example: SFAC)*
# Standard Letter Table

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

![Standard Letter Table](image-url)
Standard Letter Table

*(Add a New Value)*
Standard Letter Table
*(filled in – except for Define Comm Gen Parameters)*
Communication Context Table

Campus Community > Communications > Set up Communications > Communication Context Table

(Search page)

![Communication Context Table](image)

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

| Find an Existing Value | Add a New Value |

- **Search Criteria**
  - Academic Institution: WSLYN
  - Communication Context: begins with
  - Description: begins with

- Include History, Correct History, Case Sensitive

- Search
- Clear
- Basic Search
- Save Search Criteria
Communication Context Table

*(Add a New Value)*
Communication Context Table

(Filled In)
Communication Category Table

(Search Page)
Communication Categories

(Filled In)
Communication 3C Groups

Campus Community > Communications > Set up Communications > Communication 3C Groups (Security)
**Communication Speed Key Table**

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

<table>
<thead>
<tr>
<th>Academic Institution</th>
<th>Administrative Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>WSLYN</td>
<td>ADMF</td>
</tr>
<tr>
<td>WSLYN</td>
<td>EVNT</td>
</tr>
<tr>
<td>WSLYN</td>
<td>GEN</td>
</tr>
<tr>
<td>WSLYN</td>
<td>PROP</td>
</tr>
<tr>
<td>WSLYN</td>
<td>SENR</td>
</tr>
<tr>
<td>WSLYN</td>
<td>SFAC</td>
</tr>
<tr>
<td>WSLYN</td>
<td>SFPA</td>
</tr>
<tr>
<td>WSLYN</td>
<td>SPRG</td>
</tr>
</tbody>
</table>
Communication Speed Keys

(Filled In)
User Defaults

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

Set Up SACR > User Defaults > Communication Speed Keys (Filled In)
Data Source (DS) Query

**Unique Prompt Name – PERSON_ID**

**Edited Prompt Properties - EMPLID**

<table>
<thead>
<tr>
<th>Original Prompt Properties – EMPLID</th>
<th>Edited Prompt Properties – EMPLID</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Edit Prompt Properties</strong></td>
<td><strong>Edit Prompt Properties</strong></td>
</tr>
<tr>
<td><strong>Field Name:</strong></td>
<td><strong>Field Name:</strong></td>
</tr>
<tr>
<td>EMPLID</td>
<td>EMPLID</td>
</tr>
<tr>
<td><strong>Type:</strong></td>
<td><strong>Type:</strong></td>
</tr>
<tr>
<td>Character</td>
<td>Character</td>
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<tr>
<td><strong>Format:</strong></td>
<td><strong>Format:</strong></td>
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<td>Upper</td>
<td>Upper</td>
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<tr>
<td><strong>Length:</strong></td>
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<td><strong>Edit Type:</strong></td>
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<tr>
<td>No Table Edit</td>
<td>No Table Edit</td>
</tr>
<tr>
<td><strong>Prompt Table:</strong></td>
<td><strong>Prompt Table:</strong></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Unique Prompt Name:</strong></td>
<td><strong>RFT Short:</strong></td>
</tr>
<tr>
<td>BND1</td>
<td>RFT Short</td>
</tr>
<tr>
<td><strong>Heading Type:</strong></td>
<td><strong>Heading Text:</strong></td>
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<td>ID</td>
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<td><strong>Heading Text:</strong></td>
<td><strong>Unique Prompt Name:</strong></td>
</tr>
<tr>
<td>ID</td>
<td>PERSON_ID</td>
</tr>
</tbody>
</table>

[Diagram of original and edited prompt properties]
Data Source (DS) Query

**Unique Prompt Name**

**Edited Prompt Properties – Variable Data Field**

![Diagram showing original and edited prompt properties](image_url)
Communication Data Source
Campus Community > Communications > Set Up Communications > Communication Data Source
(Search for Administrative Function)
Communication Data Source

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

Campus Community > Communications > Set Up Communications > Communication Data Source

(Adding a New Data Source – Top of Page)
Communication Data Source

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

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

![Diagram showing data source context and query name settings](image-url)
Communication Data Source

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

(XML File Top and Bottom)
Communication Data Source

(Completed Page with Multiple Queries)
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

Dear Student:

You currently have an account balance of \texttt{fld\_DUE\_AMT} which was due on \texttt{fld\_DUE\_DT}.

Please contact us regarding this.

Validate

No Error found.

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

March 23, 2015

sample data
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 $-2,794,783,509,259,27 due Wesleyan. To review the details of your account please log into your Student Portfolio from www.wesleyan.edu and select Student Account Center.
Report Definition
Main Menu > Reporting Tools > BI Publisher > Report Definition

Add New Value on Report Definition Page
Report Definition

Enter Report Properties Under Definition Tab

![Report Definition Screen](image)
Report Definition
Associate Template with Definition
Report Definition
Upload Template
Report Definition
Preview Template

Student Accounts Office
237 High Street
Middletown, CT 06459
P: (860) 685-2800  F: (860) 685-4689
student-accounts@wesleyan.edu

March 23, 2015

sample data
sample data
sample data

sample data sample data
sample data
sample data
sample data

Dear sample data,

I write as a reminder that you still have an outstanding balance of $-21947635092592.27 due Wesleyan. To
Report Definition
Verify or Define Information on Output Tab
Report Definition
Verify or Define Information on Properties Tab
Create or Adjust Letter Code

Campus Community > Communications > Set up Communications >
Standard Letter Table CS
(Associate Report Definition with Letter Code)
Create or Adjust Letter Code  
Define Comm Gen Parameters
Create or Adjust Letter Code

Select Report Name

Report Name
  (Definition)

Data Source
Pop Select Query
Population Selection Bind for SFAC - Person
Event Definition
Campus Community > 3C Engine > Set Up 3C Engine > Event Definition
(Add a New Value)
Event Definition
(Completed Page)
Event Definition
Comm Key Detail
Event 3C Groups
Campus Community > 3C Engine > Set Up 3C Engine > Event 3C Groups
(Security Associated with Event ID)
Run 3C Engine
Campus Community > Communications > Run 3C Engine
(Add a New Value)
Run 3C Engine

3C Engine Parameters
(Not Yet Filled In)
Run 3C Engine

3C Engine Parameters
(After checking Population Selection)
Run 3C Engine
3C Engine Parameters (Filled In)
Run 3C Engine

3C Engine Parameters

(Population Selection Area Filled In)
Run 3C Engine

3C Engine Parameters

(Population Selection Area – Query Prompts)
Run 3C Engine
3C Engine Parameters
Manage Duplicate Assignment
Communication Generation
Campus Community > Communications > Communication Generation
Selection Parameters
Communication Generation
Campus Community > Communications > Communication Generation
Process Parameters