



# JOB AID

Admissions: Communication Generation

*07/06/2021*





## Admissions: Communication Generation

### Overview

Communication Generation (Comm Gen) is Campus Solution's mail merge function. At the core of all communications are four major components that are covered in this job aid:

- Letter code
- Communication data source
- Report definition
- 3C security

### Create Letter Code

**Navigation:** Campus Community > Communications > Set up Communications > Standard Letter Table CS

To see a list of all letter codes that have been created, leave the fields blank and click Search.

The screenshot shows the 'Standard Letter Table' search interface. At the top, there is a navigation bar with 'Admin Home' and 'Standard Letter Table'. Below the navigation bar, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Find an Existing Value' tab is active. Below the tabs, there is a 'Search Criteria' section with the following fields: 'Letter Code:' with a dropdown menu set to 'begins with' and an input field; 'Set Letter Code:' with a dropdown menu set to '=' and an input field; 'Description:' with a dropdown menu set to 'begins with' and an input field; and a checkbox for 'Case Sensitive'. At the bottom of the search criteria section, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. The page also includes a 'New Window | Help' link in the top right corner.

To add a new letter code, click the Add a New Value tab and complete the following:

The screenshot shows the 'Standard Letter Table' 'Add a New Value' form. At the top, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is active. Below the tabs, there is a 'Letter Code:' label followed by an empty input field. Below the input field, there is an 'Add' button. At the bottom of the form, there are links for 'Find an Existing Value' and 'Add a New Value'.



1. Enter a value in the **Letter Code** field (up to 3 characters)
2. Click **Add**

On the **Standard Letters** page, complete the following:

Standard Letters

Letter Code: D00  
\*Description: Grad Admit Regular  
Short Description: Grad Reg  
Set Letter Code: Admit Letters

**Processing Letter Details**

\*Function: Admissions Application  
Applicable to:  Persons  Organization  
\*Letter Type: Softcopy  
\*Letter Printed Data: Name/Address Only  
SOC Name: [ ]

Joint Communications Allowed  
 Include Enclosures  
 Define Comm Gen Parameters

**Template Selection**

Report Name: AD\_D00 Grad Admit Regular  
Data Source ID: MSU\_ADDC\_ADMT\_LETTERS

Template ID	Description	Language	Method	Default Template
AD_D00_1	Grad Admit Regular	English	Letter	<input checked="" type="checkbox"/>

Buttons: Save, Return to Search, Previous in List, Next in List, Add, Update/Display

1. **Description:** Enter a description for the letter (GRAD XXX or UNDERGRAD XXX)
2. **Set Letter Code:** Select from the drop down

3. **Function:** Admission Application. This selection will auto populate one of the Applicable to checkboxes below the field (Persons or Organization)



4. **Letter Type:** Softcopy. Important as soft copy allows you to extract data and merge it into a template.
5. **Define Comm Gen Parameters:** Click the checkbox
6. Click **Save**.

Now that we have defined what the Letter Code will represent, we will assign a communication category.

### Communication Category

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

To see a list of all communication categories that have been created, leave the fields blank and click Search.

To add a new communication category, click the Add a New Value tab and complete the following:



1. Enter a value in the **Communication Category** field (up to 6 characters)
2. Click the **Add** button

On the **Communication Categories** page, complete the following:

1. **Effective Date:** Defaults to today's date.
2. **Description:** For example, "Graduate Admit Letters"
3. **Function:** Select from the drop down
4. **Context:** Select from the available context codes. Click the Add button to include additional contexts in this communication category. Note: The available contexts are defined on the Communication Context page, covered in the next section of this job aid.)
5. Click **Save**

## Communication Context

**Navigation:** Campus Community > Communications > Set up Communications > Communication Context



**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](#)

To add a new communication context, click the **Add a New Value** tab and complete the following:

**Communication Context Table**

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

---

Academic Institution:

Communication Context:

[Add](#)

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

1. Enter a value in the **Communication Context** field (up to 6 characters)
2. Click the **Add** button

On the **Communication Context** page, complete the following:



Communication Context

Academic Institution MSU55 Michigan State University

Communication Context GRADMT

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

\*Effective Date: 01/01/1901 \*Status: Active

\*Description: Graduate Admit Letters

Short Desc: GR AD Ltrs

*Method	*Direction	Letter Code	Description
Letter	Outgoing Communication	D00	Grad Admit Regular
Letter	Outgoing Communication	D01	Grad Admit ADPE
Letter	Outgoing Communication	D02	Grad Admit Conditional Acad
Letter	Outgoing Communication	D03	Grad Admit Regular AFUT
Letter	Outgoing Communication	D04	Grad Admit Cond Acad AFUT

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

1. **Effective Date:** Defaults to today's date
2. **Status:** Active
3. **Description:** Enter a description (for example, *Graduate Admit Letters*)
4. **Method:** Letters

Note: A communication context can have multiple methods. For example, for the context of Award, you might send a letter and also make a phone call.

5. **Letter Code:** The code assigned to the specific communication will be displayed
6. Click **Save**

Next we will define security for the communication category.

### 3C Security

A group of users with similar needs and interests can be defined by a 3C Group. You can then associate one or more 3C Groups with a communication category. Users can be granted Update or Inquiry security access via the Communications 3C Groups Security page.

**Navigation:** Set Up SACR > Security > Secure Student Administration > User ID > 3C Group Security



**3C Group Security**

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

[Find an Existing Value](#)

▼ **Search Criteria**

User ID: begins with

Case Sensitive

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

1. **User ID:** Enter the appropriate value or click the Look-up icon to find the appropriate person.
2. Click **Search** and select the User from the search results list.

The screenshot shows the '3C Group Security' page in a mobile application. At the top, there is a navigation bar with a back arrow, 'Communication Context Table', '3C Group Security', and icons for home, menu, and search. Below the navigation bar, the page title '3C Group Security' is displayed, along with a 'New Window | Help' link. The main content area contains the search form from the previous image, but with the 'Search' button highlighted in orange. Below the search form, the 'Search Results' section is visible, showing a table with a 'User ID' column and several rows of data. The table is partially obscured by a blue overlay, suggesting a search result has been selected.

On the **3C Group Security** page, you will be able to review and/or assign the user security.





3C Group Security

User ID 10      Name

Security Settings		*3C Update/Inquiry Group		Descr	Inquiry Indicator	Update Indicator	Delete Indicator	Personalize	Find	View All	First	1-4 of 4	Last
MSU55	MSU	DEUP		Admissions External Org Update	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
MSU55	MSU	DEXT		External Organization	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
MSU55	MSU	DGEN		Admissions General	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
MSU55	MSU	DUPD		Admissions Update	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						

Save    Return to Search    Notify

In the **Security Settings**, the user's current assignments will be listed.

1. Click the **[+]** to Add a New Row
2. Click the **3C Update/Inquiry Group** Look-up icon and select a security group from the list
3. Click the **Checkbox** for the level of security to assign:
  - **Inquiry**: Select to enable the user ID to view all data in the 3C group. For example, a user that has inquiry access to a certain 3C group will only be able to view the communications, checklists, or comments assigned to an individual or to an organization that is tied to the 3C group.
  - **Update**: Select to enable the user ID to update, by entering or altering, data in the 3C group. You should also select this check box if you want the user ID to be able to process 3C items by using the 3C engine. If the user ID does not have update access to the 3C group, the 3C engine does not process a request by using the 3C group.
  - **Delete**: Select to enable the user ID to delete data in the 3C group. You should also select this check box if you want the user ID to be able to delete 3C items by using the 3C Deletion process. If the user ID does not have delete access to the 3C group, the 3C Deletion process does not process a request by using the 3C group.
4. Click **Save**

### Communication Speed Key

**Navigation:** Campus Community > Communications > Set up Communications > Communication Speed Key Table



< Communication Context Table Communication Speed Key Table Home Menu Help

New Window | Help

### 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:

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

**Note:** To see a list of Communication Speed Keys already created, simply click **Search** on the Find Existing Value tab and select an item to review from the Search Results list.

To create a new Communication Speed Key:

1. Click the **Add a New Value** tab.

**Communication Speed Key Table**

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

Academic Institution:

Administrative Function:

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

2. **Administrative Function:** Click the Look-up icon and select a value from the list (eg: *ADMA*)
3. Click **Add**



Communication Speed Keys

Institution MSU55 Michigan State University  
Function ADMA Admissions Application

Comm Key Detail Find | View All First 1 of 7 Last

Communication Key   Print Comment

Description   Activity Completed

Short Desc   Unsuccessful Outcome

\*Category  Graduate Admit Letters

\*Context  Graduate Admit Letters

Duration

\*Method  Letter Direction  Letter Code

Comments

**Note:** If multiple letters exist (eg: *Grad Admit Regular*, *Grad Admit Conditional*, etc.), use the navigational arrows in the Comm Key Details section to toggle through the letters or click **View All**.

To add a new **Communication Speed Key**, complete the following:

1. **Communication Key:** Enter a value (eg: *D00*)
2. **Description:** Describe the communication (eg: *Grad Admit Regular*)
3. **Category:** Click the Look-up icon to select the appropriate Communication Category
4. **Context:** Click the Look-up icon to select the appropriate Communication Context.
5. **Method:** Click the Look-up icon to select the appropriate Method.
6. **Direction:** Click the Look-up icon to select the appropriate Direction.
7. **Letter Code:** Click the Look-up icon to select the appropriate Letter Code.
8. Click **Save**.

### Communication Data Source

The data source specifies the source to be used (usually queries) and fields to extract data from the source. The extracted fields can be specific to one template or can be reused in multiple templates. A communication data source can also be used to identify record fields considered as critical to the Communication Generation process for producing letters or emails.

For example, the items highlighted in gray in the image below are fields from the data source that will be merged into each individual letter.



**MICHIGAN STATE UNIVERSITY**

July 13, 2020

I

fid\_FIRST\_NAME fid\_LAST\_NAME  
fid\_ADDRESS1 fid\_ADDRESS2  
fid\_CITY fid\_STATE fid\_POSTAL

Dear fid\_NAME,

Congratulations! I am delighted to inform you of your admission to Michigan State University.

You are joining an outstanding academic community of Spartans working across campus and across the world to nurture and promote diverse experiences and ideas, ensuring that structures and processes allow full participation by all members of our communities.

Details of your admission:

Term: FULL\_ADMIT\_TERM  
Level: CAREER\_LEVEL  
College: COLLEGE  
Major: PLAN\_NAME\_MAJOR  
Class: DEGREE\_AWARD\_CLASS

Please review the enclosed materials closely, and follow all instructions to complete the steps necessary to secure your place at MSU. On our website (grad.msu.edu), you'll also see a large number of programs available to help you with professional development, career planning, mentoring and wellness.

As a Spartan, you'll have a strong support network invested in your success. It's also important to know that our core values of diversity, equity and inclusivity form the basis of our leadership role in graduate education. Implicit in this is a promise that if you are not treated in a manner that is consistent with our values, we will support you in creating a more inclusive and equitable culture. Our expectation is that you will treat fellow graduate and professional students as well as staff, faculty, researchers, undergraduate students and all community members in a manner that is consistent with our shared values.



**Office of Admissions**  
Hannah Admin. Building  
428 Auditorium Road

In order to do that, we need to select the data sources and connect them to the letter.

**Navigation:** 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

1. Click the **Add a New Value** tab.



**Communication Data Source**

Find an Existing Value | Add a New Value

Data Source Map ID:

Add

Find an Existing Value | Add a New Value

2. **Data Source Map ID:** Enter the query name.
3. Click **Add**

Communication Speed Key Table | Communication Data Source

Communication Data Source

\*Data Source Map ID: MSU\_ADDC\_ADMT\_LETTERS  
Description: Admit Letters  
Owner ID: Admissions - US  
Data Source Type: XMLDoc Object  Active

Data Source Context

\*Administrative Function: ADMA Admissions Application  Person  Organization

Generic Process Data			Personalize   Find	First	1-9 of 9	Last
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 checked="" 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	Personalize   Find	First	1 of 1	Last
1	PS Query	MSU_ADDC_DECISIONS	1					

Registered Date/Time: 06/22/20 4:29:42PM Registered By: 18  
Last Update Date/Time: 06/23/20 1:42:03PM Last Update User ID: 18

Register Data Source

**Note:** The **Critical Data** check box identifies the generic data to include as critical to the creation of the letter. On the run control page, administrative users can specify what to do if critical data is missing: either to process the communication without the data or not to process the communication for IDs that are missing the data. Checklists, enclosures, and person communication recipients cannot be specified as critical data.



4. Click **Register Data Source**.

**Note:** The **Register Data Source** button automatically stores the data source inside the PeopleTools tables. This button also keeps the data source created within Campus Community synchronized with the information in the PeopleTools tables for you.

After you have registered the data source, a link will appear at the bottom of the screen where you can view a sample letter.

Communication Data Source

\*Data Source Map ID: MSU\_ADDC\_ADMT\_LETTERS  
Description: Admit Letters  
Owner ID: Admissions - US  
Data Source Type: XMLDoc Object  Active

Data Source Context

\*Administrative Function: ADMA Admissions Application  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 checked="" 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_SALINT	<input type="checkbox"/>

Custom Extract Data

Sequence	*Type	Query Name	Max Nbr	Application Class
1	PS Query	MSU_ADDC_DECISIONS	1	

Registered Date/Time: 06/22/20 4:29:42PM Registered By: 18...  
Last Update Date/Time: 06/23/20 1:42:03PM Last Update User ID: 18...

[View/Download Sample Data File](#)

5. Click the **View/Download Sample Data File** hyperlink.

6. Right click anywhere in the file and **“Save as...”** to save the file to your computer or server.

## Report Definitions

The report definition is used to associate the data source with the letter or email template.

**Navigation:** Reporting Tools > BI Publisher > Report Definition



1. Click **Add a New Value**

(If you are editing an existing letter, click **Search** and select from the search results list.)

2. **Report Name:** Enter the new report definition
3. **Data Source Type:** XML Doc Object (This is the only type of object recognized by the CommGen process)
4. **Data Source ID:** Click the Look-up icon and select the appropriate data source.
5. Click **Add**.
6. Click the **Template** tab.

The template is the body of the letter or email. Templates for communications are created in MS Word and saved as rich text format (RTF) files. This is where you upload the letter created in the previous section.



< Definition Report Definition Home Help

Definition Template Output Properties Security Bursting New Window | Help

Report Name: AD\_D00

**Data Source**

Data Source Type: XMLDoc Object Change Data Source

Data Source ID: MSU\_ADDC\_ADMT\_LETTERS

Data Source Description: Admit Letters

**Report Properties**

Report Description: Grad Admit Regular

\*Report Status: Active

\*Report Category ID: ALLUSER All PeopleSoft User

Owner ID: PeopleTools

\*Template Type: RTF

Retention Days:

Registered Date/Time: 06/23/2020 9:50:29AM Registered By: 1: [redacted]

Updated Date/Time: 06/23/2020 10:20:53AM Updated By: 1: [redacted]

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

Add Update/Display Include History Correct History

Return to Search Previous in List Next in List

Save

7. **Report Description:** Enter a description
8. **Report Status:** Active
9. **Owner ID:** PeopleTools
10. **Template Type:** RTF
11. Click the **Template** tab at the top of the page.
12. Click the **Upload** button to upload the letter saved on your computer or server.





Definition > Report Definition

Report Name: AD\_D00

Template ID: AD\_D00\_1 (Default Template)

Description: Grad Admit Regular

\*Language Code: English Channel: Printer

Template Files

Effective Date: 05/01/2020

\*Status: Active Use Data Transform

Template File

Upload Preview Use Alt. XML

Add Update/Display Include History Correct History

Return to Search Previous in List Next in List Save

Once the file has been uploaded, the **Template File** field will display the file name.

13. Click **Preview** to review the letter.

14. Click **Save**.

Definition > Report Definition

Report Name: AD\_D00

Template ID: AD\_D00\_1 (Default Template)

Description: Grad Admit Regular

\*Language Code: English Channel: Printer

Template Files

Effective Date: 05/01/2020

\*Status: Active Use Data Transform

Template File: D00\_GRAD\_Admit\_REGL\_6\_1\_2020.rtf

Upload Preview Use Alt. XML

Add Update/Display Include History Correct History

Return to Search Previous in List Next in List Save

The next step is to create a Run Control ID.

## Run Control ID

**Navigation:** Campus Community > Communications > Communication Generation

1. Click the **Add a New Value** tab.



**Communication Generation**


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**

Run Control ID: begins with ▼

Case Sensitive

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

2. Enter a **Run Control ID**.

3. Click **Add**.

On the Run Control ID page, complete the following:

4. **ID Selection**: All Person IDs

5. **Letter Code**: Enter a value or click the Look-up icon and select the appropriate letter code.

6. In the **Communication Method Usage** section, ensure the **Method** is correct (eMail, Letter, etc.)

7. Click the **Process Parameters** tab.

8. In the **Person Communication Usage** section, enter the appropriate values for:

- Address
- Address Name
- Salutation
- Extra Name

9. In the **Communication Date Range** section, select a date range that defines when the population was assigned the communication code. Communications will only be generated for persons assigned the communication code within the defined date range.

10. **Update Communication Generation Date**: System Date

11. **Update Communication Completed Date**: System Date

12. **Output Settings**: Select from the following:

- **Online Preview**: Allows for the previewing the communication prior to sending to 'actual' recipients, select the Online Preview option then enter your email address in the Email address field. This will send sample communications of up to the first 10 recipients to your inbox for review.
- **Send to Printer**: Used when generating PDF files to be printed for mailing

13. **Missing Critical Data**: Uncheck Produce Communication; uncheck Complete Communication