



# JOB AID

Admissions: Communication Generation

*07/16/2021*





## Admissions: Communication Generation

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### 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.

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

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

Step 2. Click **Add**

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

Step 3. **Description:** Enter a description for the letter (GRAD XXX or UNDERGRAD XXX)

Step 4. **Set Letter Code:** Select from the drop down

Step 5. **Function:** Admission Application. This selection will auto populate one of the Applicable to checkboxes below the field (Persons or Organization)

Step 6. **Letter Type:** Softcopy. Important as soft copy allows you to extract data and merge it into a template.

Step 7. **Define Comm Gen Parameters:** Click the checkbox

Step 8. 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:

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

On the Communication Categories page, complete the following:

- Step 3. **Effective Date:** Defaults to today's date.
- Step 4. **Description:** For example, "Graduate Admit Letters"
- Step 5. **Function:** Select from the drop down
- Step 6. **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.)
- Step 7. Click **Save**

## Communication Context

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

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

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

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

- Step 3. **Effective Date:** Defaults to today's date
- Step 4. **Status:** Active
- Step 5. **Description:** Enter a description (for example, Graduate Admit Letters)
- Step 6. **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.

- Step 7. **Letter Code:** The code assigned to the specific communication will be displayed
- Step 8. 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

Step 1. **User ID:** Enter the appropriate value or click the Look-up icon to find the appropriate person.

Step 2. Click **Search** and select the User from the search results list.

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

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

Step 3. Click the **[+]** to **Add a New Row**

Step 4. Click the **3C Update/Inquiry Group Look-up** icon and select a security group from the list

Step 5. 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.

Step 6. Click **Save**

### Communication Speed Key

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

**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:



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

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

Step 3. Click **Add**

**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:

Step 4. **Communication Key:** Enter a value (eg: D00)

Step 5. **Description:** Describe the communication (eg: Grad Admit Regular)

Step 6. **Category:** Click the Look-up icon to select the appropriate Communication Category

Step 7. **Context:** Click the Look-up icon to select the appropriate Communication Context.

Step 8. **Method:** Click the Look-up icon to select the appropriate Method.

Step 9. **Direction:** Click the Look-up icon to select the appropriate Direction.

Step 10. **Letter Code:** Click the Look-up icon to select the appropriate Letter Code.

Step 11. 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.

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

Step 12. Click the **Add a New Value tab**.

Step 13. **Data Source Map ID:** Enter the query name.

Step 14. Click **Add**



< Communication Speed Key Table Communication Data Source Home Help

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Communication Data Source

\*Data Source Map ID   
 Description   
 Owner ID

Data Source Type XMLDoc Object  Active

**Data Source Context**

\*Administrative Function  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	<input type="checkbox"/>
2	List of Enclosures	ENCLOSURES	<input type="checkbox"/>
3	Address for a person	PER_ADDRESS	<input checked="" type="checkbox"/>
4	List of Person Communication Recipients	PER_COMM_RECIP	<input type="checkbox"/>
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** Personalize | Find | First 1 of 1 Last

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 181000045  
 Last Update Date/Time 06/23/20 1:42:03PM Last Update User ID 181000045

[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.

Step 15. 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.

Step 16. Click the **View/Download Sample Data File** hyperlink.

Step 17. 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

- Step 1. Click **Add a New Value**  
(If you are editing an existing letter, click Search and select from the search results list.)\
- Step 2. **Report Name:** Enter the new report definition
- Step 3. **Data Source Type:** XML Doc Object (This is the only type of object recognized by the CommGen process)
- Step 4. **Data Source ID:** Click the Look-up icon and select the appropriate data source.
- Step 5. Click **Add**.
- Step 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.

- Step 7. **Report Description:** Enter a description
- Step 8. **Report Status:** Active
- Step 9. **Owner ID:** PeopleTools
- Step 10. **Template Type:** RTF
- Step 11. Click the **Template** tab at the top of the page.
- Step 12. Click the **Upload** button to upload the letter saved on your computer or server.  
Once the file has been uploaded, the Template File field will display the file name.
- Step 13. Click **Preview** to review the letter.
- Step 14. Click **Save**.

The next step is to create a Run Control ID.

## Run Control ID

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

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



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

Step 3. Click **Add**.

On the Run Control ID page, complete the following:

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

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

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

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

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

- Address
- Address Name
- Salutation
- Extra Name

Step 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.

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

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

Step 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

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