CHAPTER 1

Managing Communications

This chapter lists prerequisites and common elements, provides overviews of communication management and joint communications, and discusses how to:

- Assign communications.
- Use the Letter Generation process.
- Use the Communication Generation process.
- Review communications.
- Use the Envelope and Label Generation process.
- Delete communications.

See Also

lscc, Understanding the 3Cs — Communications, Checklists, and Comments

lscc, Using the 3C Engine

lsfn, Using Mass Change

lscc, Using the Population Selection Process

Understanding Communication Management

Communication management enables you to track and analyze all of your institution's contacts with students, staff, constituents, and organizations inside and outside the institution. You can track:

- All incoming and outgoing communications.
- All types of communication—letters, email, phone calls, personal contact, facsimiles, and so on.
- Communications generated by other offices that affect your office.
- All staff involved with a communication.

You can also assign communications to individuals, organizations, and groups of people.

To assign a communication, you must select the method, category, context, direction, and letter code for that communication to identify basic information about the communication, such as the who, what, when, and how of each communication, which correlate in this way:

- Method = How
- Context = What
- Category = Why

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- Direction = Where
- Date = When
- ID = Who

Use the communication management pages to manually assign communications to individuals or organizations. You can access the communication management pages as described here, or you can access them by clicking the Communication button on pages throughout the system.

You can assign communications to individuals and organizations manually, or you can use the 3C engine to automatically assign communications to individuals or organizations based on rules and conditions that you define.

See lscc, Using the 3C Engine, Defining 3C Engine Triggers.

You can indicate whether the communication is a phone conversation, a letter, or an in-person meeting with the individual. If the communication is an outgoing softcopy document, you can, with either Letter Generation or Communication Generation, manage the variable data and enclosures to include, and enter comments that you can choose to print or not print in the output. With Communication Generation, you can also manage variable data, attachments to include, and comments to include or exclude in an outgoing email. With Communication Generation, you can also send an outgoing communication based on the student's preferred method of either letter or email, and send it in any language supported by your institution that is set at the student's preferred language.

In addition to creating communications for individuals, you can create communications for organizations. For example, you can send letters to schools announcing that an admissions counselor from your institution will be in their area on a certain date, or you can send bills to companies with which your institution does business.

When you assign a communication, you must identify the data to extract about the recipients and select the code from the Standard Letters table to identify the template to use. For Letter Generation, you use your institution's word processing software to merge the data into a template created with that software and associated with the letter code, or into one of the sample Microsoft Word templates that the PeopleSoft application delivers. For Communication Generation, you identify the data source from which to extract data, associate it with the XML report definition, and associate the report with the standard letter code.

Use the inquiry pages to review communication information for an individual or an organization. You can enter criteria and search for a summary of communications or view details of the communication assignments. You can search for a summary of communications to determine if a specific communication was sent, if it included enclosures, or if it was a joint communication.

Note. You are able to view only those communications that are associated with the communication 3C groups to which you have security access. With 3C group inquiry access, you can view communication assignments, but you cannot change them. With 3C group update access, you can view and change the communications. Use the Operator 3C Groups Summary page to determine or change an individual's 3C group security status.

See lsfn, Setting User Defaults, Entering User Defaults, Selecting the Type of 3C Group Access.

This procedure provides a high-level overview of the managing communications processes and the order in which they must be performed. Steps 1 through 5 are described in Setting Up Communications.

To generate and manage communications:

1. Set up codes for the standard letters that your institution wants to use.

   Each letter requires an administrative function.

2. Set up communication contexts.

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Contexts include methods, directions, and letter codes.

3. Set up communication categories.

   Categories are sets of communication contexts.

4. Set up communication 3C groups.

   3C groups are required for assigning security access for communications.

5. (Optional) Set up communication speed keys (Comm Keys).

   Comm Keys enable you to associate communication elements together and access them as a set, using the assigned shortcut code.

6. Assign communications to individuals or organizations.

   You can assign communications manually or you can use the 3C engine to assign communications automatically in real time or in the background.

7. Review communications assigned to individuals or organizations.

   You can review the details of each communication. You can view a list of all communications assigned to them. You can also review the security access that users have for viewing or updating the communications.

8. Generate the communications.

   You can use either the Letter Generation process to generate letters or the Communication Generation process to generate letters and emails. The Letter Generation process extracts data that you can then, using your word processing software, merge into letter templates. The Communication Generation process extracts only the data specified in the source file and merges it immediately into the associated Oracle BI Publisher templates for letters or emails. For emails, the process also sends the generated outputs to the extracted email addresses.

9. Review the data that was extracted for each of the IDs processed.

Understanding Joint Communications

PeopleSoft Campus Solutions enables you to communicate jointly with individuals at a common address rather than producing separate communications for each individual. For example, you can invite a married couple or two roommates to an event by sending a single invitation to their joint address.

Functions on the relationships and communications pages enable you to create joint communications for two individuals when at least one of the individuals exists in your database.

Detailed information about each page where you select an option or enter data to manage joint communications is included in the appropriate places throughout the documentation. The following procedure provides a high-level overview of the process and indicates where the relevant pages are documented.

To set up joint communications functionality:

1. Design how the two names appear in the greeting and in the address portion of the letter by setting up the joint salutation on the Joint Salutation Type Table page.

   See lscc, Designing Campus Community, Establishing Salutations.

2. Set the Default Salutation Type on the Installation Defaults - CC page.

   If no default salutation type is defined, the letter generation data extract process fails.

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See lscc, Designing Campus Community, Reviewing or Defining Campus Community Installation Settings.

3. Create joint usages on the Name Usage page.

   Always include the default salutation type (from step 2) in usage orders for joint communications so that the process does not fail due to the lack of a salutation.

   See lscc, Designing Campus Community, Establishing Name Usages.

To generate a joint communication:

1. Set the letter code on the Standard Letters page to Allow Joint Communication.

   See lscc, Setting Up Communications, Defining Letter Codes.

2. Create the relationship on the Relationship page for the individual in your database.

   Click the Manage Joint Communication button to access the Joint Communication Management page, where you set the relationship to Create Joint Communication, and define the joint salutation.

   See lscc, Managing Biographical Information, Managing Relationships Data.

3. Identify the address to use for the joint communication and select the Joint Address check box on the Relationship Address page.

   See lscc, Managing Biographical Information, Managing Relationships Data.

4. Assign the communication to the individual in your database; if both individuals are in your database, assign the communication to only one.

   You can use the 3C engine to detect the related records and automatically assign the joint communication, or you can assign the communication manually on the Person Communication page, where you assign communications to individuals.

   Select the Create Joint Communications check box on the Person Communication page. This check box is available for selection based on steps 1 and 2 and when the ID has a relationship set to enable joint communications and the letter code is set to enable joint communications.

   See lscc, Using the 3C Engine.

   See lscc, Managing Communications, Assigning Communications.

5. Run the Letter Generation or the Communication Generation process to create an extract file containing data for the joint IDs, including the specified joint salutation and joint address.

   The Communication Generation process extracts the joint email address specified in the Relationships component.

   See lscc, Managing Biographical Information, Managing Relationships Data.

6. (Optional) Review communications and verify when they were sent, to whom they were sent, and if they were joint.

   You can review all communications in the system or review a summary of communications assigned to the primary individual or the related ID, if it exists. The joint communication is listed in the summary for both IDs even though the joint communication can be assigned to only one ID.

   See lscc, Managing Communications, Reviewing Communications.

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Prerequisites

Before assigning and managing communications, you must set up communications in the system.

See Also

lscc, Setting Up Communications

Common Elements Used in This Chapter

(communications)	Click to transfer to where you can add a new communication for the individual or organization.
(checklists)	Click to transfer to where you can add a new checklist for the individual or organization.
(comments)	Click to transfer to where you can enter a new comment for the individual or organization.
View or Edit	Click to transfer to where you can view or edit the communication assignment.

Note. The View link is available when the user has 3C group *inquiry* access for the communication category. The Edit link is available only when the user has 3C group *update* access for the communication category.

Assigning Communications

This section discusses how to:

- Assign a communication.
- Review or update variable data.
- Add or delete enclosures.
- View the communication generated by the Communication Generation process.
- Identify recipients for an organization.

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Pages Used to Assign Communications

Page Name	Definition Name	Navigation	Usage
Person Communication	COMM_MGMT1	• Campus Community, Communications, Person Communications, Communication Management • Contributor Relations, Constituent Information, People, Communications, Communication Management • Contributor Relations, Communications, Communications, Person, Communication Management	Assign communications to individuals.
Organization Communication	ORG_COMM_MGMT1	• Campus Community, Communications, Organization Communications, Communication Organization • Contributor Relations, Constituent Information, Organizations, Communications, Organization Communication • Contributor Relations, Communications, Communications - Organization, Organization Communication	Assign communications to organizations.
Variable Data	VAR_XXXX_SEC (where XXXX is the administrative code)	• Click the Variable Data button on the Person Communication page. • Click the Variable Data button on the Organization Communication page.	Review or edit variable data for an individual or organization.
Communication Enclosure	ENCL_TBL_SEC	• Click the Enclosures button on the Person Communication page. • Click the Enclosures button on the Organization Communication page.	Review, add, or delete enclosures when assigning a communication.

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Page Name	Definition Name	Navigation	Usage
View Communication	SCC_CG_ATTREL	Click the View Generated Communication link that appears on the Person Communication or Communication Recipient Data pages or on the Organization Comm Recipients page when a communication is generated by the Communication Generation process.	Launch a new window displaying the final outputs, including softcopy enclosures, generated by the Communication Generation process.
Organization Comm Recipients	ORG_COMM_MGMT2	• Campus Community, Communications, Organization Communications, Communication - Organization, Organization Comm Recipients • Contributor Relation, Constituent Information, Organizations, Communications, Organization Communication, Organization Comm Recipients • Contributor Relations, Communications, Communications - Organization, Organization Communication, Organization Comm Recipients	Identify the contacts, departments or locations at the organization who should receive the communication.

Assigning a Communication

Access the Person Communication page (Campus Community, Communications, Person Communications, Communication Management) or the Organization Communication page (Campus Community, Communications, Organization Communications, Communication Organization).

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Person Communication | Communication Recipient Data

Jane Brisebois ID: CCCG0001

Communication Assignment

Assign DateTime: 04/11/2006 2:37:54PM

*Function: ADMA Admissions Application Variable Data

*Institution: PeopleSoft University

Comm Key:

*Category: CG Communication Generation Test

*Context: CG Communication Generation Test

*Method: L Letter

*Direction: Outgoing Communication

Letter Code: CG Communication Generation Test Include Enclosures Enclosures

Communication Process Details

Communication Date: 04/11/2006 Begin Time: End Time:

Comments: Bonjour! Ceci est un test pour CCCG0001. Print Comment

Communication ID: KU0007 Locherty,Betty

Department:

Create Joint Communications

Checklist Association

Sequence:

Item Sequence:

Person Communication page (1 of 2)

Communication Process Details

Communication Date: 04/11/2006 Begin Time: End Time:

Comments: Bonjour! Ceci est un test pour CCCG0001. Print Comment

Communication ID: KU0007 Locherty,Betty

Department:

Create Joint Communications

Checklist Association

Sequence:

Item Sequence:

Communication Outcome

Communication Generation Date: 11/06/2009

Communication Completed Date Activity Completed: 11/06/2009

Unsuccessful Outcome Reason:

Language Used English

Method Used Letter

Process Used CommGen View Generated Communication

Process Instance 830

Person Communication page (2 of 2)

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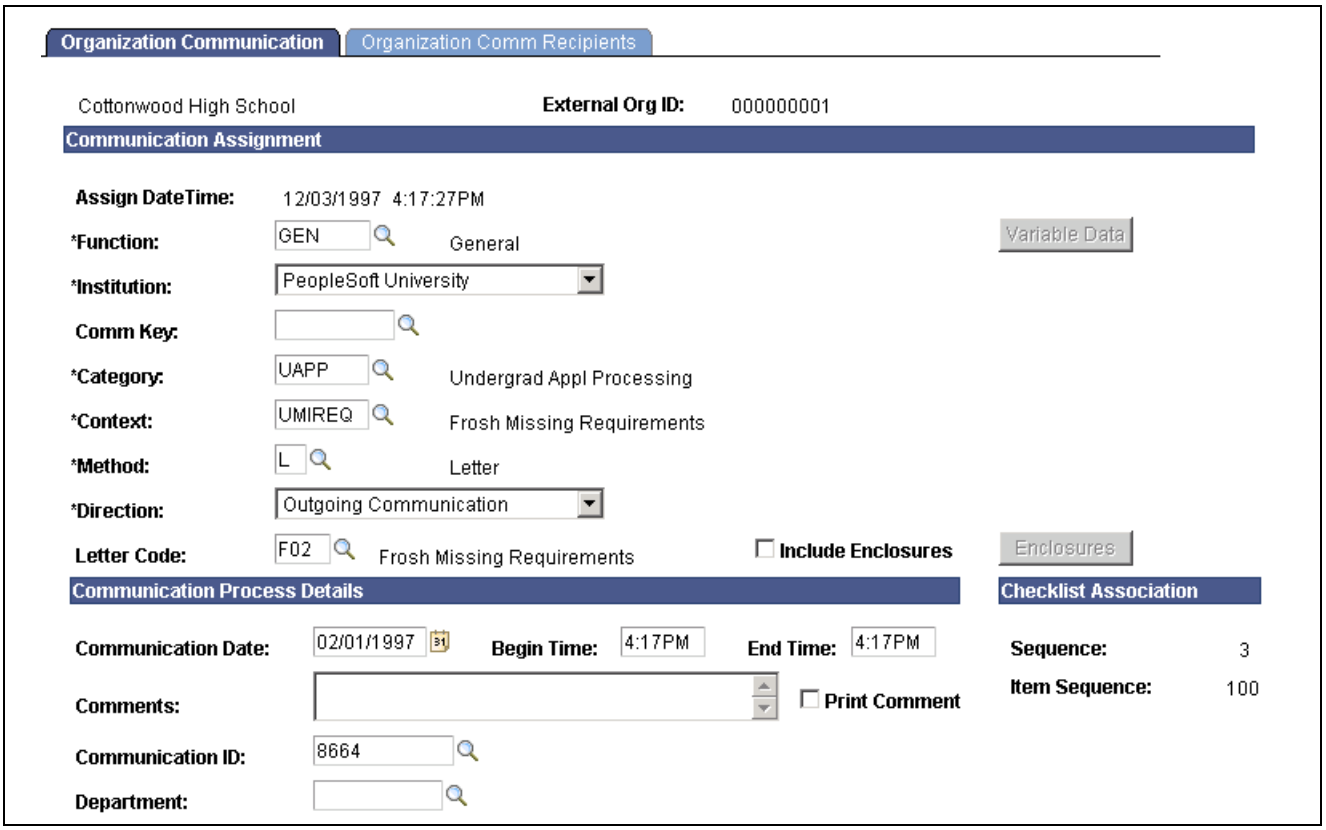

Organization Communication page (1 of 2)

Organization Communication page (2 of 2)

Note. If you transferred to this page by clicking the Communication button on another page, the administrative function of the functional area of the first page, along with the academic institution and all the variable data associated with the administrative function, transfers here. If you did not transfer here from a functional area, you must enter the function, institution, and variable data.

Communication Assignment

Function Enter the code for the functional area that includes this communication.

Available function codes are from the Administrative Functions page.

Variable Data Click this button to access the Variable Data page, where you can view or enter the required variable data associated with the specified function.

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Institution Specify the institution responsible for this communication.

Comm Key (communication speed key) Enter the name of the communication speed key that contains the communication category, communication context, method, direction, and letter code for this communication.

When you select a communication speed key that is valid in your user preferences, the system displays all the values for you. If you do not use a valid communication speed key, you must enter the category, context, method, direction, and letter code values manually.

Category Enter the category code for this communication.

Available category codes are from the Communication Categories page.

Context Enter the context code for this communication.

Available context codes are from the Communication Contexts page.

Method Enter the method for this communication.

Only the methods associated with the specific context on the Communication Contexts page are available.

Note. The method selected on the Communication Generation process run control component overrides the method that you enter on the assignment component.

Direction Select the direction for this communication.

Only the directions associated with the specific context on the Communication Contexts page are available from the prompt list.

Letter Code The code, from the Standard Letter Table CS component, for this communication. The letter codes available are those associated with the context and function selected for this communication.

Include Enclosures If the selected letter code represents a letter that is set up to include enclosures, the system automatically selects this check box for you. You can then click the Enclosures button to review, add, or delete the set enclosures.

If the letter is not set up to include enclosures, you can manually select this check box to include enclosures and click the Enclosures button to add the desired enclosures.

Enclosures This button is available when the Include Enclosures check box is selected. Click to access the Communication Enclosure page, where you can review, add, or delete enclosures.

Communication Process Details

Communication Date The default communication date is the system's current date. You can override this date.

Enter the date on which the communication should be processed. For example, you might assign a communication today, but want the communication to be processed two weeks from today. Override the default date and enter the date two weeks from now. The extract processes for both Letter Generation

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	and Communication Generation look at this date to know when to generate the communication.
Begin Time and **End Time**	Enter the times when the communication begins and ends. These times are helpful for telephone or in person communications.
Comments	Enter comments to further identify or describe the communication for this individual. If comments are associated with the communication speed key, the system automatically displays them here. You can change these comments or delete them.
Print Comment	Select this check box to print comments on the communication.
Communication ID	Enter the ID of the staff person who communicated with or is initiating this communication with the individual.
Department	(Optional) Enter the department within your institution that is responsible for assigning this communication. Available departments are from the Department Profile page.
Create Joint Communications	This check box is available only if the individual to whom you are assigning the communication has a joint relationship on the Relationships component and if the letter code on the Standard Letters page is set to allow joint communications. When available, select this check box to address the communication jointly to this individual and the related individual identified on the Relationships page. See lscc, Managing Communications, Understanding Joint Communications. See lscc, Managing Biographical Information, Managing Relationships Data.

Checklist Association

The system automatically populates the fields in this group box only when the communication is created as part of a checklist.

Sequence	The checklist sequence, from the Checklists page.
Item Sequence	The checklist item sequence number, from the Checklists page, that created this communication.

See lscc, Setting Up Checklists, Setting Up Checklist Templates.

Communication Outcome

When you run either the Letter Generation process or the Communication Generation process, the system automatically completes the fields in this group box to indicate the outcome of the communication, at which point the fields become uneditable.

If you do not use either of the processes and you want to track the communication outcome, you must manually enter the appropriate values in the fields.

Communication Generated Date	The system displays the date and time when the process generated the communication.

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For the Letter Generation process this is the Update Communication Letter Printed Date With from the run control page.

For the Communication Generation process this is the Update Communication Generation Date With from the run control page.

Communication Completed

Select the check box to indicate that the communication was generated. For example, the communication is complete if the phone call was made or if the letter was generated.

The Letter Generation and Communication Generation processes automatically mark the communication complete so that the process will not select the ID again for the same communication.

On the run control pages for both processes, you can set the process to not mark the communication complete if the ID is missing critical data. Administrative users can add the missing critical data (for example, a missing address) and the process will select the ID again for processing.

See lscc, Managing Communications, Using the Letter Generation Process.

See lscc, Managing Communications, Using the Communication Generation Process.

If you are using a communication speed key, the system might select this check box for you, depending on information associated with that Comm Key.

See lscc, Setting Up Communications, Defining Communication Speed Keys.

Date Activity Completed

Enter the date when completing the communication. Letter Generation and Communication generation processes populates this date with the Update Communication Completed Date With date from their respective run control page. You can manually override this date.

Note. When you update the status of a communication that is related to a checklist item, the system displays a message reminding you to also update the status of the checklist item.

Unsuccessful Outcome

Select this check box to indicate that the communication was unsuccessful. For example, if no one answered the phone or the letter was returned as undeliverable.

If the Letter Generation or Communication Generation process was used, the process selects this check box to indicate that the process was unable to successfully extract data for this communication. The Communication Generation process also selects this check box if the ID was set to receive an email but no email address was found, and if no organization recipient was found when generating an organization communication.

If you are using a communication speed key, the system might select this check box for you, depending on information associated with that Comm Key.

Reason

Available when the Unsuccessful Outcome check box is selected.

Indicates the reason that the communication was unsuccessful. For example, if a letter that you sent was returned, you might select *Returned Mail* as the reason that the communication was unsuccessful.

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The Letter Generation or the Communication Generation processes select *Missing Critical Data* to indicate that the absence of critical data prevented the extract process from completing for this communication.

Values for this field are delivered with the system as translate values. Do not modify the values of *Missing Critical Data, Invalid Email Address,* and *No Org Recipients Found.*

Language Used and **Method Used**

Displays the values used by the generating process.

The Letter Generation process uses the base language that was set for your institution at installation and the method of *Letter,* which is the only method that the process supports.

The Communication Generation process uses the language and method specified on the Communication Generation run control component.

Also, for communications with individuals, if your institution supports preferences and the Communication Generation process is set to use them, the preferences takes priority over your institution's base language and the method selected during communication assignment.

For example, assume that your institution's base language is English and the assigned method is*Letter,* but an ID's preferred language is French and her preferred method is email. The Communication Generation process is set to use the preferences and upon completion of the process, the outcome Language Used would be *French,* and the Method Used would be *Email.*

For communications with organizations, the Language Used is your institution's base language, and the Method Used is determined by your selection on the Communication Generation Run Control parameters page.

Note. Communication preferences are not supported for organization recipients.

Process Used

Displays the name of the process used to generate the communication: *Letter Gen, Comm Gen,* or *Manual* if you manually completed the communication.

Process Instance

Appears only when the communication for the ID is marked *Completed* by the Letter Generation, Communication Generation, or Envelope and Label Generation process. You cannot change the number. The process instance number is a reference to the communication data used by the process to generate and complete the communication.

The process instance number from the Communication Generation process retrieves the data extracted for the letter to ensure data consistency when envelopes and labels are generated by the Envelope and Label process. The process uses the Communication Generation process instance number (on the Envelope and Label Generation Selection Parameters page) to capture the same data.

View Generated Communication

This link appears only when a communication is generated by the Communication Generation process and the Letter Printed Data field in the Standard Letter Table CS component for the letter code used, is set to *All* or *Name/Address Only.*

If recipients are set for the ID on the Relationships component, this link appears on the Communication Recipient Data page for each recipient for

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whom the communication was generated. The process uses the language and method assigned to the main ID for the ID's recipients.

For organization communications, the link appears on the Organization Comm Recipients page for each recipient for whom the communication was generated.

Click to access the View Communication page where you can view the final outputs of the generated communications, including softcopy enclosures. This is useful for history purposes and for reprinting a letter or re-sending an email.

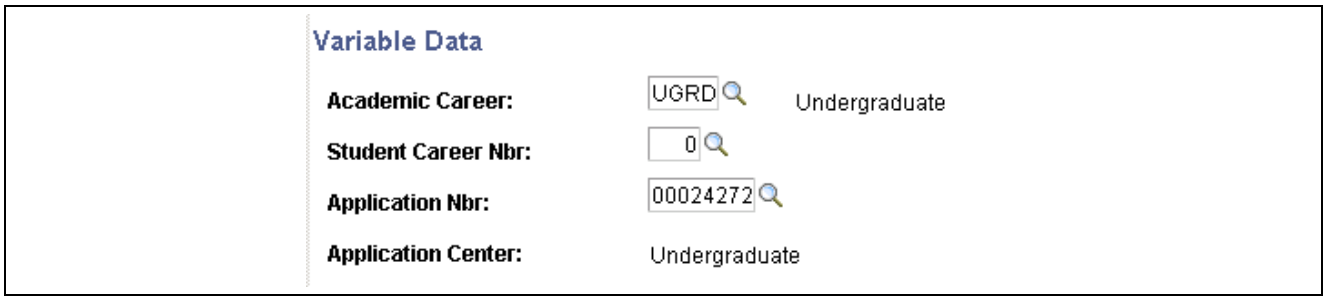
Note. The View Generated Communication link appears only for the Communication Generation process. The Letter Generation process saves extracted data inside the Communication Letter Data page for each ID.

See lscc, Setting Up Communications, Defining Letter Codes.

See lscc, Setting Up Biographical Information, Setting Up Individual Relationships.

Reviewing or Updating Variable Data

Access the Variable Data page. (For individuals, click the Variable Data button on the Person Communication page. For organizations, click the Variable Data button on the Organization Communication page.)



Variable Data page

Different fields and data appear on this page based on the administrative function selected on the Person Communication page.

See Also

lscc, Setting Up Administrative Functions

Adding or Deleting Enclosures

Access the Communication Enclosure page. (For individuals, click the Enclosures button on the Person Communication page. For organizations, click the Enclosures button on the Organization Communication page.)

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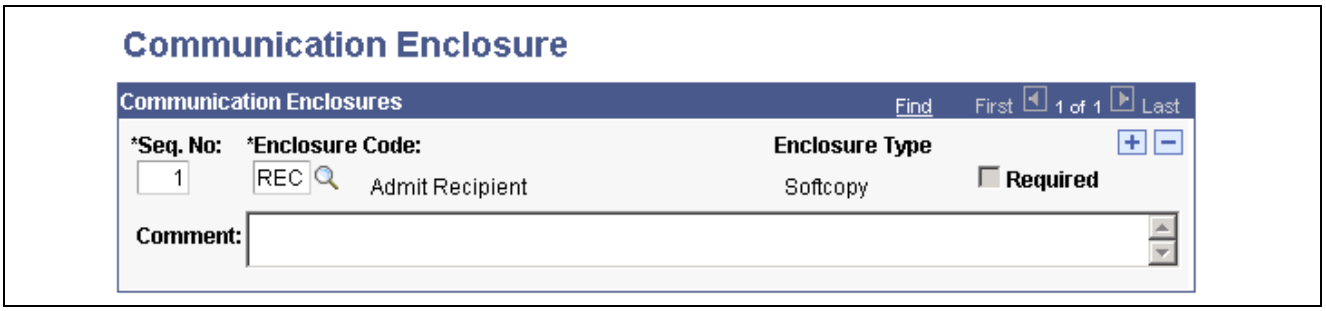


Communication Enclosure page

Note. When an enclosure is set as required for a letter on the Standard Letters page, information for that enclosure is visible but not available on the Communication Enclosure page. Thus, users are prevented from deleting an enclosure that your institution has decided is required.

Seq. No (sequence number)

The system automatically enters the next sequential number, up to 10, for each enclosure that you add. You can override the numbers manually to reorder the list of enclosures for this communication.

When you run the letter generation data extract process, the process lists, in the order identified here, up to 10 maximum enclosures on the main letter.

Enclosure Code

Enter the code for the letter that is to be included as an enclosure for this communication.

The letter codes available are those associated with the same function that you select for the main letter code. For example, if you select the function *ADMA* for the main letter code, the Enclosure Code field prompt list displays the letter codes that exist and are associated with the function ADMA on the Standard Letters page.

Enclosure Type

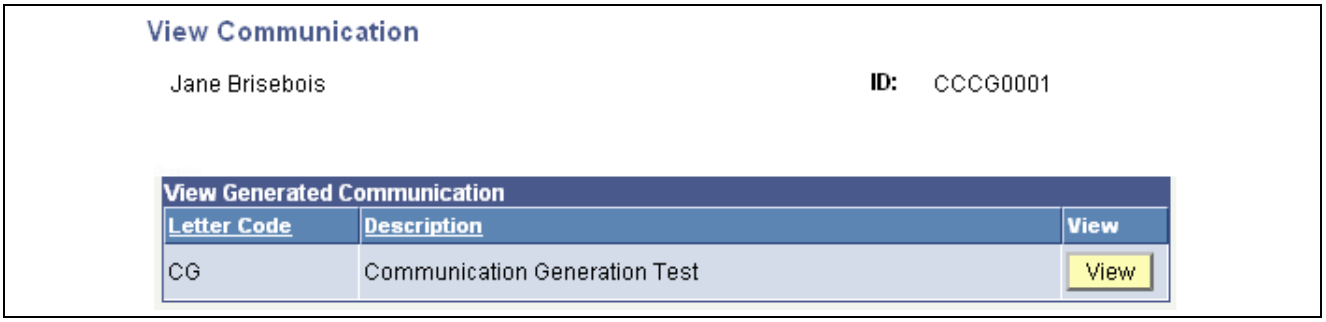
The system automatically displays the type of output *(Hardcopy* or *Softcopy)* associated with the selected enclosure letter code.

Required

Select this check box to indicate that the specific enclosure must accompany this communication at all times.

Viewing the Communication Generated by the Communication Generation Process

Access the View Communication page (click the View Generated Communication link that appears on the Person Communication or Communication Recipient Data pages or on the Organization Comm Recipients page when a communication is generated by the Communication Generation process).



View Communication page

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ORACLE

CO – ENG

Jane Brisebois
123 Jane Brisebois Street
Apt# CCCG0001
Malibu, CA 90215
HOME

Student ID: **CCCG0001**

Date: **Nov 5, 2009**

Dear **Jane**,

Thank you for your interest in **PeopleSoft University**! You sent us all the required admissions documents for the **Undergraduate** academic program **Liberal Arts Undergraduate**. Our admissions committee will shortly be starting the evaluation process. A response to your demand should be mailed to you by the end of the summer.

If you have any questions, please contact the Admissions Office at 888-555-1212 by mentioning your application number **00024272**.

Sincerely,

Barbara Smith
Admissions Office

Example view of a generated letter output

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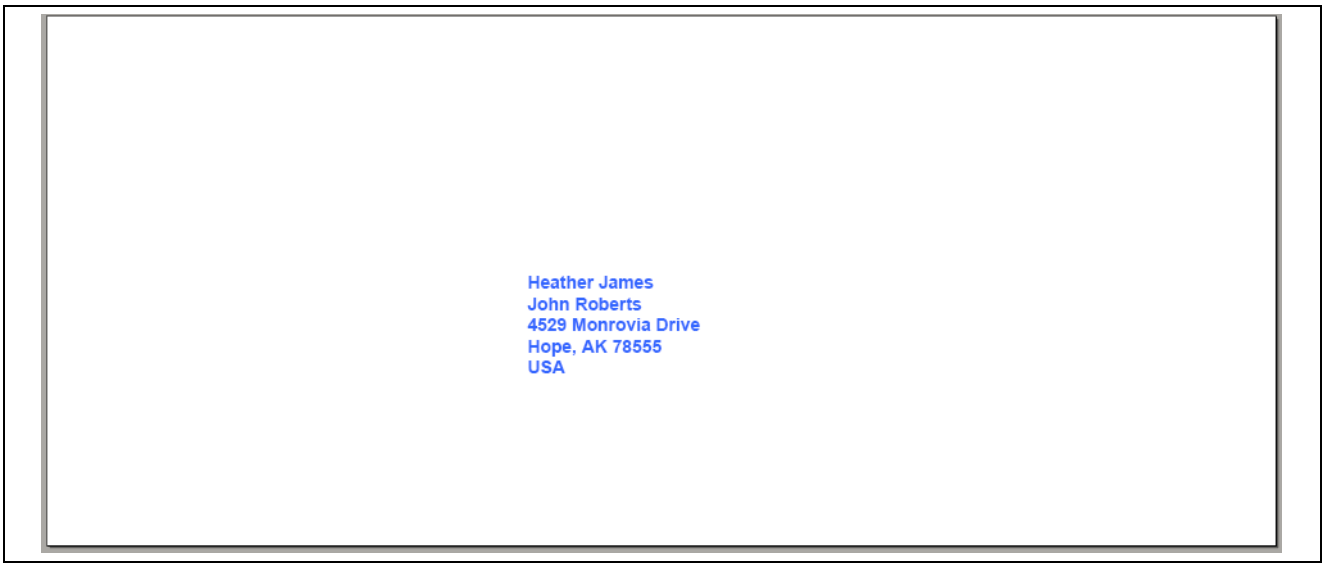

Example view of a generated envelope output

View

Click to open a new window displaying the .pdf or .rtf file containing the generated letter or email output.

Note. The first letter code in the View Generated Communication list is the main letter code of the generated communication. The other letter codes, if any, are the enclosures letter codes.

View Envelope

Appears only when the *Create Envelopes* output option is selected on the Process Parameters page in the Communication Generation component.

Click the link to open a new window displaying the .pdf file containing the generated output for the envelope. Viewing the envelope data can help you gather all information necessary to resend a communication.

Note. You can view only the generated envelope, not the label. However you can use the envelope data to recreate the label if necessary.

Identifying Recipients for an Organization

Access the Organization Comm Recipients page (Campus Community, Communications, Organization Communications, Communication - Organization, Organization Comm Recipients).

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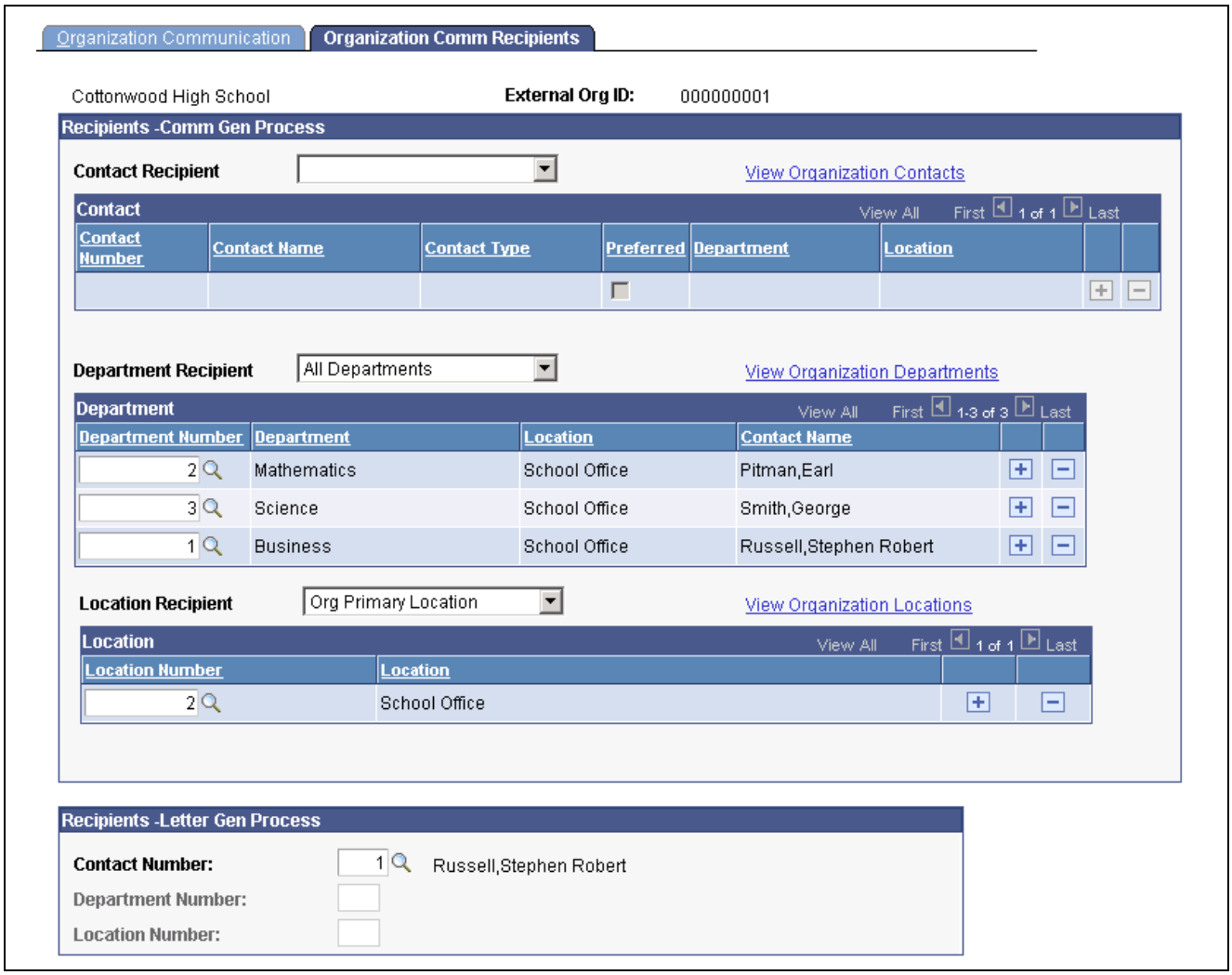

Organization Comm Recipients page

If the letter code used to assign the communication has Communication Generation parameters defined on the Standard Letters Table page, then both the Recipients - Comm Gen Process and Recipients - Letter Gen Process group boxes appear. If, when you assign the communication, you do not know which process will be used to generate the communication, you can either define recipients for both processes, or you can leave the fields blank in which case, the process evaluates default usages to select the recipients.

Recipients - Comm Gen Process

The Communication Generation process will extract data for multiple recipients including contacts, departments, locations or any combination of those.

The system displays values in the Contact, Department, and Recipient group boxes based on the *Contact Recipient*, *Department Recipient*, and Location Recipient values that you enter.

The fields are enterable only when *Custom List* is selected. If you do not know who should receive the communication for an organization, do not select any recipients. The Communication Generation process will evaluate the value entered in the Org Communication Usage group box in the run control component. If the process does not find recipients based on the usage, it selects the Unsuccessful Outcome check box and displays the reason *No Org Recip Found* (no organization recipient found).

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After the Communication Generation process runs, each group box becomes unavailable and lists who in that group was set to receive the communication. The system displays a *View generated communication* link next to each recipient for whom the output was generated. Click to access the Communication View page where you can launch a window displaying the final output as it was addressed to that recipient.

If you select *All Departments*, the system displays all the departments for the organization in the Recipients - Comm Gen Process group box as of that date. For example, if you run the process 2 weeks later and 3 more departments were added, the process extracts data for all departments including those 3 and the group box lists 3 more department names than before.

Contact Recipient	Enter the type of contact that should receive this communication. The available values are: *(Blank), All Contacts, Custom List, Org Preferred Contact,* and *Org Primary Contact.* These are translate values and should not be modified.
View Organization Contacts	Click to access the Organization Contacts Summary page, where you can view all the contacts for this organization by contact type to determine which contacts should receive this communication.
Contact Number and **Preferred**	Enter the number of the specific recipient contact. The system displays the contact's name, type, location, and department. If the contact is set as the preferred contact on the Contact Summary page for the organization, the system selects the Preferred check box. See lscc, Adding Organizations to Your Database, Creating Organization Records, Identifying the Organization, Active Contacts.
Department Recipient	Enter the departments whose contacts should receive this communication. The available values are: *(Blank), All Departments, Custom List,* and *Org Primary Department.* These are translate values and should not be modified.
View Organization Departments	Click to access the Organization Department Summary page, where you can view all the departments and their contacts for this organization to determine which contacts should receive this communication.
Department Number	Enter the number of the specific recipient department. The system displays the department and location names from the Organization Departments page See lscc, Adding Organizations to Your Database, Creating Organization Records, Identifying the Organization, Active Departments.
Location Recipient	Enter the location whose contacts should receive this communication. The available values are: *(Blank), All Locations, Custom List,* and *Org Primary Location.*These are translate values and should not be modified.
View Organization Locations	Click to access the Organization Location Summary page, where you can view locations for this organization to determine which contacts to select as recipients for this communication.
Location Number	Enter the number of the specific recipient location. The location information comes from the Location Summary page for the organization. See lscc, Adding Organizations to Your Database, Creating Organization Records, Identifying the Organization, Active Locations.

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Recipients - Letter Gen Process

For the Letter Generation process, you can identify the recipient for the organization if you know it, or you can leave the fields blank, in which case the process evaluates default usages to select the recipient for you.

Contact Number	Enter the contact number of the person at the organization who should receive this communication. Available IDs are from the Organization Contacts page.
Department Number	Enter the number of the department at the organization whose contact should receive this communication. Available departments are from the Organization Departments page.
Location Number	Enter the number of the location to use for this organization. Available locations are from the Organization Locations page.

Using the Letter Generation Process

This section provides overviews of the Letter Generation (Letter Gen) process and the sample templates, lists prerequisites, and discusses how to:

- Specify general parameters.
- Specify date/merger parameters.
- Specify checklist parameters.
- Run the letter generation data extract process.

Understanding the Letter Generation Process

You can extract data from your PeopleSoft Campus Solutions system and use it to generate letters, labels, lists, envelopes, and so on. You can extract data from one individual ID, all individual IDs, or all organization IDs in your database. You specify the type of data to extract and then run the extract process. The system places the extracted data into a comma delimited (.csv) file, which is a standard format readable by most word processing programs. Then, using your institution's word processing software, you can merge the data into any of the templates that you have for the letter codes defined on the Standard Letters page, including the sample Microsoft Word templates delivered with the system, and print the outcome.

For information about using your institution's word processing software to merge data and print letters, consult the manufacturer's documentation.

Before you can extract letter data, a communication record for the desired letter must be assigned to the intended recipients. For joint communications, you should assign the communication to only one of the individuals. If you assign it to both, the letter generation process extracts the data for both IDs and will print two joint communications for the same two people. The record must include the appropriate administrative function, communication category, and communication context, and specify a method of *Letter* and the direction of *Outgoing*. You can assign communications to individuals or organizations manually or using the 3C engine or mass change functionality.

When the communication records exist, follow this procedure to use the Letter Generation process to extract data and generate a letter:

To generate a letter:

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1. Specify the data to extract for the letter, including the ID, address usage, address name, salutation, and letter code.
2. Specify the date to print on the letter, the date to use as the letter completed date, and the communication date selection range.
3. Specify any checklist items to include in the letter.
4. Run the Letters Data Extract process to extract the specified data.
5. Use your word processing program to merge the extracted data into the letter template.
6. Save the softcopy template with merged data or use it to print the letter.

Specifying the parameters for extracting data for the letter includes selecting the letter to use, identifying the individuals or organizations whose data you want to extract, and specifying the types of data to extract. Use the run control pages, described in the following sections, to specify extract data parameters.

After defining all of the parameters for extracting data, run the data extract process. Unless you specify a different file path, the process places the data files in the temporary directory for the server. You can specify a shared folder on your local machine or on any valid network drive path.

When the process finishes, files with the appropriate file names are placed at the specified extract file path destination. If you select the .csv output, three files are created at the destination:

- CCLTR<LETTERCODE>.CSV for letters.
- CCLBL<LETTERCODE>.CSV for labels.
- CCLTRGEN.DAT file, which is coded to work with the Microsoft Word templates delivered with the system.

For example, if you use the TRN letter code and you select the .csv output, the file for letters at the destination is CCLTRTRN.CSV.

Note. If you use a letter code for which you specified a unique SQC, you must place the SQC in the same directory as the CCLTRGEN.sqr and the CCLTRUNQ.sqc. You must also modify CCLTRNAM.SQC to look for the specific SQC.

You can review extracted data online for individuals and organizations on the Communication Letter Data pages.

When you run the letter generation data extract process, the data specified under Letter Printed Data for that letter code on the Standard Letter Table page is listed on the Communication Letter Data page for individuals or on the Organization Communication Letter Data page for organizations. You can use these pages to review and confirm the data extracted for an individual or organization. For example, using the Communication Letter Data page, you can confirm the address to which the letter for a specific individual was addressed.

The letter generation data extract process automatically formats extracted addresses to meet U.S. postal regulations for domestic and international mail. The format is reflected in the address listed on the appropriate Letter Data page.

If you set a relationship to generate a copy of communications for a separate recipient on the Communication Recipient page in the Relationships component, you can view the data extracted for that separate recipient on the Communication Recipient Data page described in this section.

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Understanding the Letter Generation Sample Templates

The letter generation data extract process creates a .dat file for merging data from your system into Microsoft Word templates. The PeopleSoft Campus Solutions system delivers sample Microsoft Word templates. You can use the sample templates as delivered, modify them (unless otherwise indicated in the warning below), or create your own Microsoft Word templates.

This table lists the CS letter codes with corresponding delivered sample templates.

Letter Code	Description	Microsoft Word Template Name
APP	Appointment Mailer	CCLTRAPP.DOC
AV1	Gift Acknowledgement	CCLTRAV1.DOC
AV2	Gift Receipt	CCLTRAV2.DOC
CST*	Inquiry Acknowledge – Viewbook	CCLTRCST.DOC
F02	Frosh Missing Requirements	CCLTRF02.DOC
F03	Frosh Admit Regular	CCLTRF03.DOC
FAN*	Financial Aid Notification	FANLTR.DOC
IHC	International Health Coverage	CCLTRIHC.DOC
IN1	Initiative Appeal	CCLTRIN1.DOC
JNT	Summer party - Joint Invitation	CCLTRJNT.DOC
MAD	Mid-Term Academic Deficiency	CCLTRMAD.DOC
MB1	Membership Card	CCLTRMB1.DOC
OFR	Early Offer Letter	CCLTROFR.DOC
OPR	Web Operator Notification	CCLTROPR.DOC
P01	Inquiry Acknowledgment	CCLTRP01.DOC
REC	Admit Recipient Letter	CCLTRREC.DOC

Warning! Do not modify the PeopleSoft Financial Aid FAN letter code or template. Modifications to this value could cause processes that depend on it to fail, requiring substantial reprogramming effort.

For sample templates delivered for PeopleSoft HRMS, refer to the PeopleSoft HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Generating Form Letters."

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Prerequisites

Before identifying data to extract and merge into letters or other communications output, design your Campus Community structure, including names and address usages. Before specifying checklist items data to extract, set up checklists and tracking groups.

See Also

lscc, Designing Campus Community

lscc, Setting Up Checklists

Pages Used for the Letter Generation Process

Page Name	Definition Name	Navigation	Usage
General Parameters	RUNCTL_LTRGEN1	Campus Community, Communications, Letter Generation, General Parameters	Specify general parameters for extracting letter data, including the IDs for which data is to be extracted, the letter code into which the data should be merged, the name and address usages to use, and the joint salutation (if appropriate).
Date/Merge Parameters	RUNCTL_LTRGEN2	Campus Community, Communications, Letter Generation, Date/Merge Parameters	Specify the necessary file locations, dates, and sort option for extracting data.
Checklist Parameters	RUNCTL_LTRGEN3	Campus Community, Communications, Letter Generation, Checklist Parameters	Specify any checklist items to extract and use in a letter.

Specifying General Parameters

Access the General Parameters page (Campus Community, Communications, Letter Generation, Checklist Parameters).

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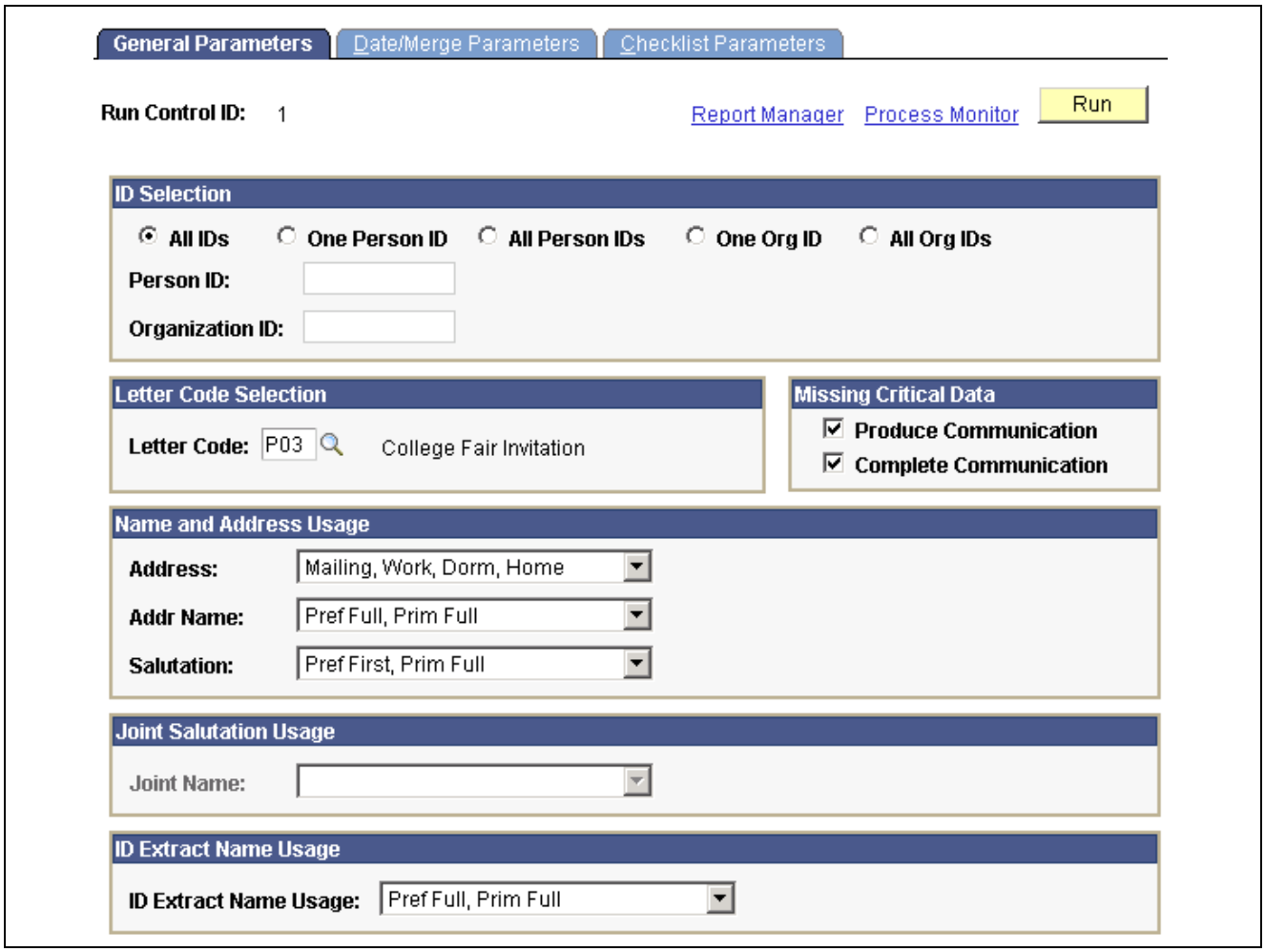

General Parameters page

ID Selection

All IDs Select to extract the data from all IDs (person IDs and organization IDs) that are assigned a communication with the letter code indicated and that are not marked complete.

One ID Select to extract the data from the one individual ID indicated. The communication with the indicated letter code must be assigned to this individual.

If you select the One ID option, specify the individual's ID in the Person ID field.

All Person IDs Select to extract the data from all the individuals' IDs that are assigned a communication with the letter code indicated.

One Org ID (one organization ID) Select to extract the data from the one organization ID indicated. The communication with the indicated letter code must be assigned to this organization.

If you select the One Org ID option, specify the organization's ID in the Organization ID field.

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All Org IDs (all organization IDs)

Select to extract the data from all the organization IDs that are assigned a communication with the letter code indicated and that are not marked complete.

Letter Code Selection

Letter Code

Enter the letter code that identifies the template into which to merge the extracted data.

Only those letter codes to which you have 3C group security access are available from the list.

Missing Critical Data

Produce Communication

Select this check box for the process to produce the extract file even if critical data is missing (for example, address information or name of the recipient).

Complete Communication

Select this check box for the process to set the status to *Complete* even if critical data is missing.

Name and Address Usage

Name and address usages apply to letters addressed to individuals. They do not apply to letters for organizations.

Address

Enter the type of address, from the Address Usage page, to extract for this letter.

You can list address types in a preferred search-and-use order. For example, if you list an address usage that contains*Mailing*, *Billing*, and *Home* the system searches for the mailing address first; if none exists, then the billing address; if none exists, the home address last.

Addr Name (address name)

Enter the type of name, from the Name Usage page, to extract for the address section of this letter.

As with addresses, you can list address name types in a preferred search-and-use order.

Salutation

Enter the type of name, from the Name Usage Table page, that the system should extract for use in the opening or salutation of this letter.

For example, you might want to use the individual's primary full name in the address section of the letter, but use his preferred first name in the salutation (Dear Dave).

As with addresses, you can list salutation name types in a preferred search-and-use order.

Joint Salutation Usage

Joint Name

The Joint Name field is available when the selected letter code is set on the Standard Letters page to allow joint communications. The joint names available in the list are those with the Joint Usage check box selected on the Name Usage page.

The process extracts this salutation name usage for IDs set up for joint communications.

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ID Extract Name Usage

ID Extract Name Usage

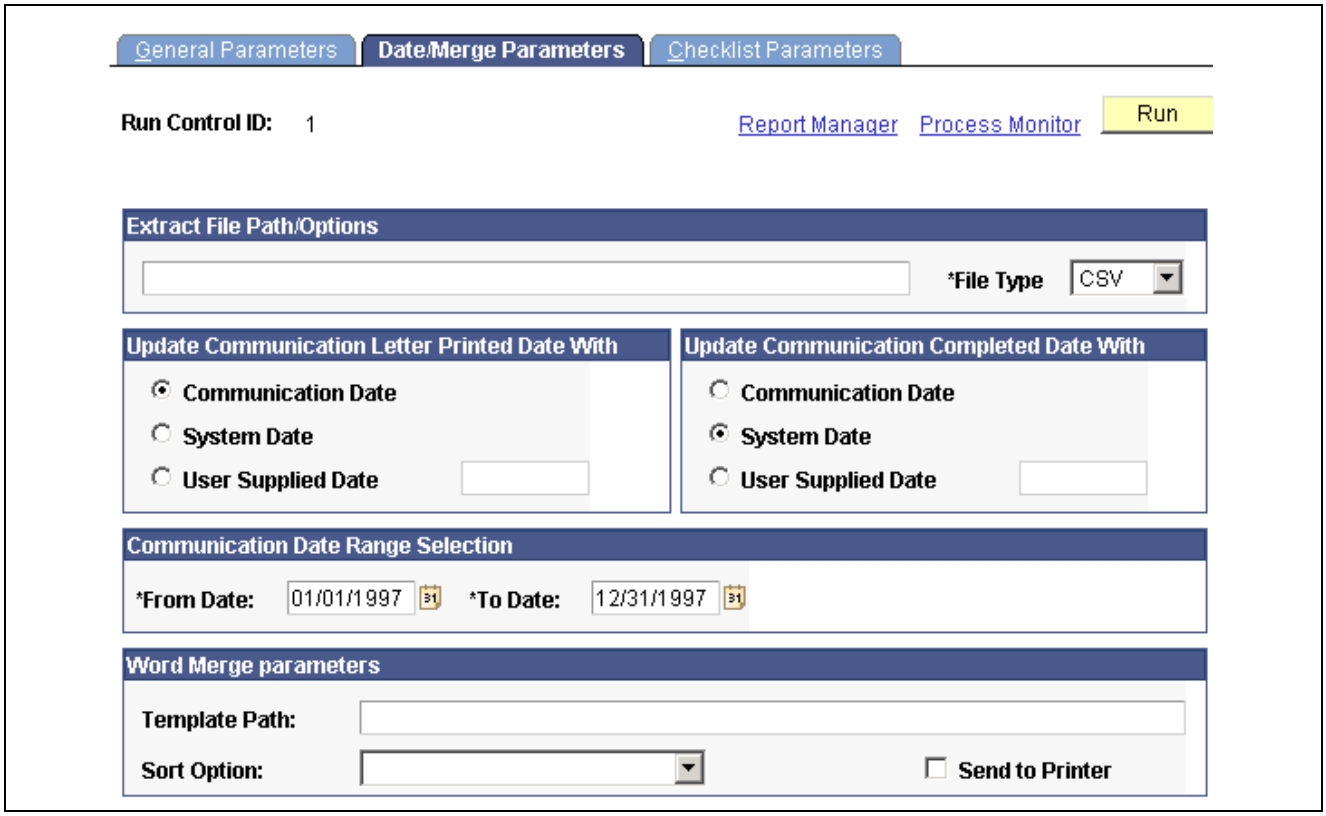
Enter the ID name usage to use. The ID Extract Name Usage is an additional way to extract name data using the name usage.

For example, you might want to use the individual's primary full name in the address section of the letter (Mr. Juan M. Dominguez), his preferred first name in the salutation (Dear Juan), and his last name in the text to say *We are sure the Dominguez family will enjoy participating in this event.*

As with addresses, you can list ID name types in a preferred search-and-use order.

Specifying Date/Merge Parameters

Access the Date/Merge Parameters page (Campus Community, Communications, Letter Generation, Date/Merge Parameters).



Date/Merge Parameters page

Extract File Path/Options

The server temporary directory is the default location for the .cvs and .dat extract files. If you want the system to place the files elsewhere, specify the correct path here.

The path must be a valid network path, containing the path delimiter (forward slash or back slash), and be in the appropriate letter case (upper or lower) for your platform. For example, on Windows NT where the target machine is Machine01 and the target folder is LtrData, the valid path is \\Machine01\temp\LtrData\.

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File Type Select the file type (*CSV* or *Other*) to create an extract file compatible with your word processing program. Comma delimited (.csv) files are compatible with most word processing programs.

The process also creates a .dat file specifically for Microsoft Word and the Word templates delivered with the system.

Update Communication Letter Printed Date With

Select the date to appear on the letter.

Communication Date Select to use the communication assignment date from the Person Communication page for individuals or the Organization Communication page for organizations as the date on the letter.

System Date Select to extract the current system date for the date of the letter.

User Supplied Date Select to use the specified date as the date of the letter. You must supply the desired date.

Update Communication Completed Date With

Select the date for the system to use as the communication completed date on the communication record.

Communication Date Select to use the date when the communication was assigned as the communication completed date.

System Date Select to use the current system date as the communication completed date.

User Supplied Date Select to use the specified date as the communication completed date. You must supply the desired date.

Communication Date Range Selection

Enter the date range of the communication records from which to extract data. For example, you might want to extract data only from those IDs to which you assigned a specific letter code and set the communication date between January 1 and March 1 of the current year.

Use the date range to schedule and manage letter communications. For example, you might schedule daily or weekly runs of the letter generation data extract process for prospect inquiry letters, or missing information letters for applicants.

The from and to date range is inclusive of the dates that you enter.

Word Merge Parameters

If you are using the sample Word templates delivered with the system or if you are using other templates created in Microsoft Word, specify parameters here. A macro (CCLTRGEN.DOT) built into the delivered Word template process uses these parameters when performing a letter merge.

If you are not using Microsoft Word, you can skip these fields.

Note. Setting these parameters on the Letter Generation run control page affects the data included in the CCLTRGEN.DAT file, but does not invoke the Word merge process. To perform a letter merge, you must launch Word and perform the merge process.

Template Path Enter the file path to the template into which the process should merge the data.

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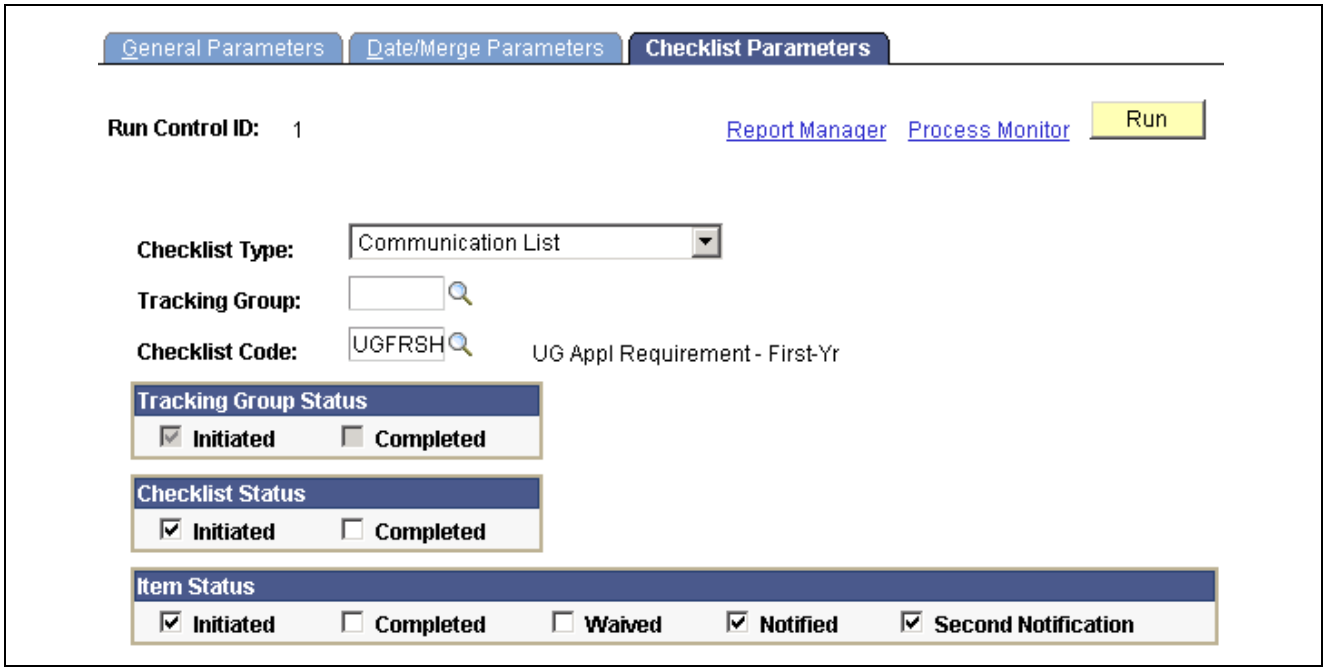
Sort Option Enter the order in which the process should sort the merged letters.

Values for this field are delivered with the system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Send to Printer Select for the Word letter merge process to automatically send the letter with merged data to the printer.

Specifying Checklist Parameters

Access the Checklist Parameters page (Campus Community, Communications, Letter Generation, Checklist Parameters).



Checklist Parameters page

Checklist Type Enter the type of checklist from which the process should extract data for this letter.

Tracking Group Enter the tracking group whose checklist data the process should extract for this letter.

Checklist Code Enter the specific checklist code whose checklist item data the process should extract for this letter.

Tracking Group Status

If you specified a tracking group, you must also select a tracking group status. You can select more than one status option.

Initiated Select to extract tracking group data with the status of *Initiated* for this letter.

Completed Select to extract tracking group data with the status of *Completed* for this letter.

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Checklist Status

Initiated	Select to extract data from checklists with the status of *Initiated* for this letter.
Completed	Select to extract data from checklists with the status of *Completed* for this letter.

Item Status

If you specified a checklist code, you must select a checklist item status. You can select more than one status option.

Initiated	Select to extract data from checklist items with the status of *Initiated* for this letter.
Completed	Select to extract data from checklist items with the status of *Completed* for this letter.
Waived	Select to extract data from checklist items with the status of *Waived* for this letter.
Notified	Select to extract data from checklist items with the status of *Notified* for this letter.
Second Notification	Select to extract data from checklist items with the status of *Second Notification* for this letter.

Running the Letter Generation Data Extract Process

After you specify the extract parameters, you can run the CCLTRGEN data extract process by clicking the Run button from the General Parameters page, the Date/Merge Parameters page, or the Checklist Parameters page.

Note. Setting parameters on these run control pages affects the data included in the CCLTRGEN.DAT file; however, it does not invoke the merge process. To perform a merge, you must launch the merge process provided from within your institution's word processing software. If you want to merge the extract data into any of the sample templates (or other Word templates), you must launch Word and perform Word's Mail Merge process.

Note. The default output for CCLTRGEN is .csv. This setting is defined within the CCLTRGEN program. Selecting Type and Format field values on the Process Scheduler Request page does not change this output.

See Also

lscc, Managing Communications, Reviewing Communications, Reviewing Extract Data for a Communication

Using the Communication Generation Process

This section provides overviews of the Communication Generation (Comm Gen) process and the sample templates, lists prerequisites, and discusses how to:

- Enter selection parameters.
- Enter process parameters.

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- Enter email parameters.
- Enter checklist parameters.

Understanding the Communication Generation Process

The Communication Generation process (SCC_COMMGEN) is an application engine process that enables you to select specific fields from which to extract critical data for a letter code assigned to individual and organization IDs for whom you want to generate the communication. If your institution sets up and supports multiple languages and multiple methods for communications, you can generate communications for individuals in the language and method preferred by each recipient ID.

For communicating with organizations, the Communication Generation process enables you to select multiple contacts of multiple types as recipients of the communication for an organization. You can use contact names or organization departments and locations or any combination thereof.

Note. The preferred communication language and method features apply only to person communications. You cannot set preferences for recipients of organization communications.

The Communication Generation process supports enclosures, joint communications, communication recipients, checklist extract and status update, usages (names, address and salutation), print communication comment, and so on. Oracle BI Publisher is a PeopleTools feature that enables you to manage and merge communication templates and data source files for the Communication Generation process to generate letters or emails. The process uses standard letter codes from the Standard Letter Table page in PeopleSoft Campus Community.

Note. Both the Letter Generation and the Communication Generation processes use the letter codes set in the Standard Letter Table CS component. The only difference is that you must set up some additional aspects of a letter code specifically for the Communication Generation process. The Letter Generation uses the same letter codes, but ignores the Communication Generation-specific settings.

To use the Communication Generation process, you must first assign a communication record for the desired letter code to the intended recipients. For joint communications, you should assign the communication to only one of the individuals. If you assign it to both, the Communication Generation process extracts the data for both IDs and generates two joint communications for the same two people. The record must include the appropriate administrative function, communication category, and communication context and the direction of *Outgoing*.

You can assign communications to individuals or organizations manually, or you can use the 3C engine to assign them using the Population Selection process, the Trigger Event process, or the Mass Change process.

See Also

lscc, Setting Up Communications, Setting Up the Communication Generation Process

lscc, Managing Communications, Understanding Joint Communications

lscc, Managing Communications, Assigning Communications

lscc, Managing Communications, Assigning Communications, Adding or Deleting Enclosures

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Understanding the Communication Generation Sample Templates

The Communication Generation extract process uses an Oracle BI Publisher data source for merging data from your system into templates. The PeopleSoft system provides samples of Oracle BI Publisher templates for the Communication Generation process. Templates are objects stored in the PeopleSoft database that are associated with report definitions starting with *QA_CS* and have a data source type of *XMLDoc Object.* You can use the sample templates as delivered, modify them unless otherwise indicated, or create your own templates. The sample report definition and template names begin with *QA_CS*, but you can rename them.

See *PeopleTools: Oracle BI Publisher for PeopleSoft.*

This table lists the letter codes and corresponding report definitions.

Letter Code	Description	Report Definitions
CG	Communication Generation Test	QA_CSCGREPO QA_CSXTRADMA
CG1	Comm Generation Org Test 1	QA_CSCG1REPO QA_CSXTRAVIN
CG2	Comm Generation Org Test 2	QA_CSCG2REPO QA_CSXTRAVIN
CGO	Comm Generation Org Test	QA_CSCGOREPO QA_CSXTRAVIN
F01	Frosh Application Acknlgment	QA_CSF01REPO QA_CSXTRADMA
F02	Frosh Missing Requirements	QA_CSF02REPO QA_CSXTRADMA
REC	Admit Recipient	QA_CSRECREPO QA_CSXTRADMA
RM1*	Reminder Letter - 1st Request	QA_CS_SF_RMD
RM2*	Reminder Letter - 2nd Request	QA_CS_SF_RMD
RM3*	Reminder Letter - 3rd Request	QA_CS_SF_RMD
XT1	Extract Enclosure 1	QA_CSXTRGEN
XTR	Extract Data testing - CommGen	QA_CSXTRGEN

*Before modifying these letter codes, consult your student financials department or system administrator. Modifications to these could cause failure of processes that depend on them.

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Prerequisites for the Communication Generation Process

Before identifying data to extract into a template, design your Campus Community structure, including names and address usages. Before specifying checklist items data to extract, set up checklists and tracking groups. Before running the Communication Generation process to generate and print letters, configure your printer for printing PDF format, and before running the process to generate and send emails, set your Process Scheduler SMTP settings.

See Also

lscc, Designing Campus Community

lscc, Setting Up Checklists

PeopleTools: PeopleSoft Process Scheduler, "Managing PeopleSoft Process Scheduler," Using PSADMIN with PeopleSoft Process Scheduler.

PeopleTools: Oracle BI Publisher for PeopleSoft.

Pages Used for the Communication Generation Process

Page Name	Definition Name	Navigation	Usage
Selection Parameters	SCC_CG_RUNCTL1	• Campus Community, Communications, Communication Generation, Selection Parameters • Contributor Relations, Session Management, Acknowledgements, Generate Acknowledgements, Communication Generation, Selection Parameters • Contributor Relations, Communications, Process Communications, Communication Generation, Selection Parameters	Specify general parameters for extracting letter data, including the recipient IDs for which data is to be extracted, the letter code, and report name. Also define the language and the method for the Communication Generation process to use to generate a specific letter or email.

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Page Name	Definition Name	Navigation	Usage
Process Parameters	SCC_CG_RUNCTL2	• Campus Community, Communications, Communication Generation, Process Parameters • Contributor Relations, Session Management, Acknowledgements, Generate Acknowledgements, Communication Generation, Process Parameters • Contributor Relations, Communications, Process Communications, Communication Generation, Process Parameters	Specify usages and dates for the Communication Generation process to use, identify how the process is to handle missing critical data, and specify where the process is to place and sort the output when generating a specific letter or email.
Email Parameters	SCC_CG_RUNCTL_EMAL	• Campus Community, Communications, Communication Generation, Process Parameters • Contributor Relations, Session Management, Acknowledgements, Generate Acknowledgements, Communication Generation, Process Parameters • Contributor Relations, Communications, Process Communications, Communication Generation, Process Parameters	Enter email data for the Communication Generation process to use when generating an email.

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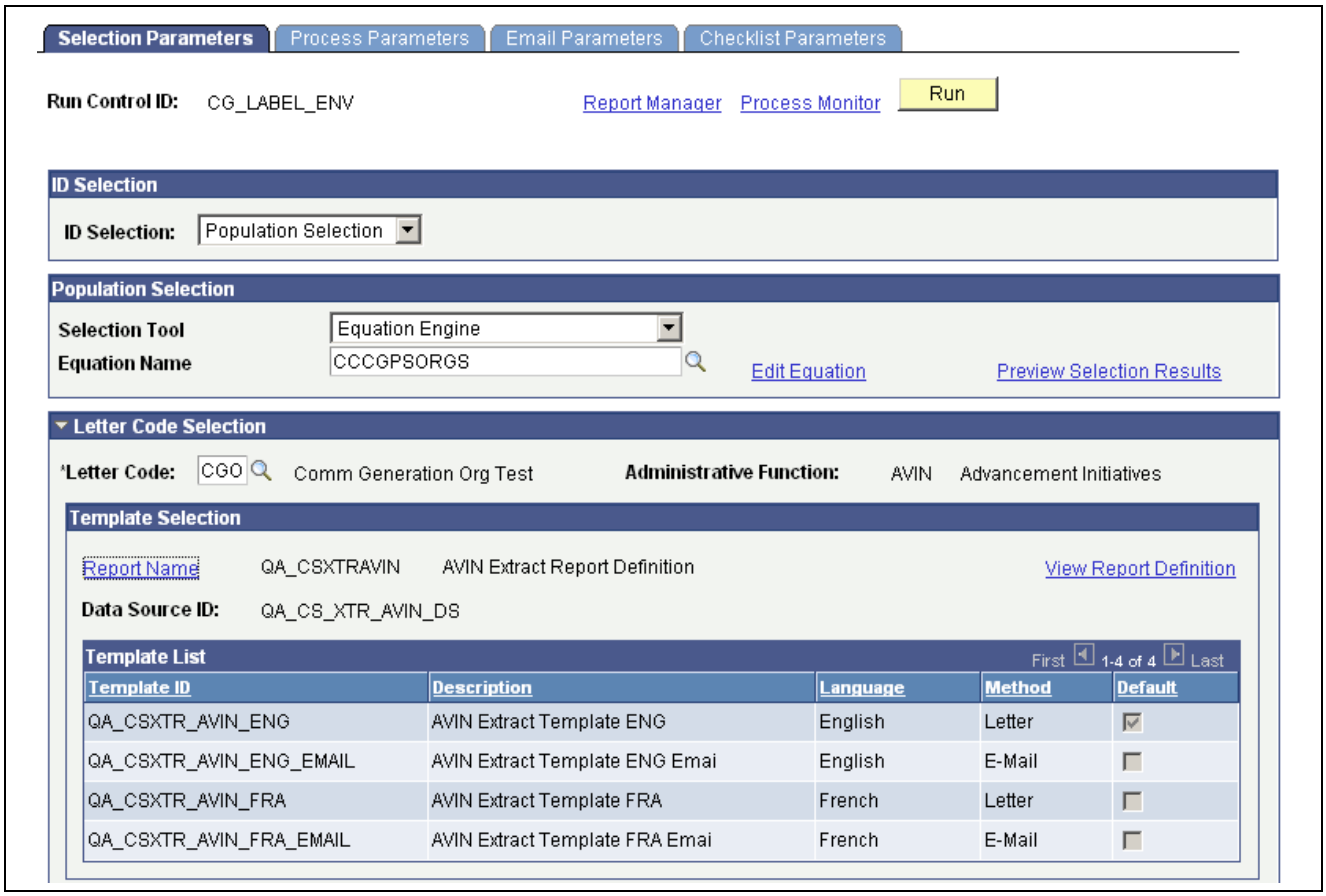
Page Name	Definition Name	Navigation	Usage
Checklist Parameters	SCC_COMM_CHKLST	• Campus Community, Communications, Communication Generation, Email Parameters • Contributor Relations, Session Management, Acknowledgements, Generate Acknowledgements, Communication Generation, Email Parameters • Contributor Relations, Communications, Process Communications, Communication Generation, Email Parameters	Specify any checklist items to extract and use in a letter or an email.

Entering Selection Parameters

Access the Selection Parameters page (Campus Community, Communications, Communication Generation, Selection Parameters).



Selection Parameters page (1 of 2)

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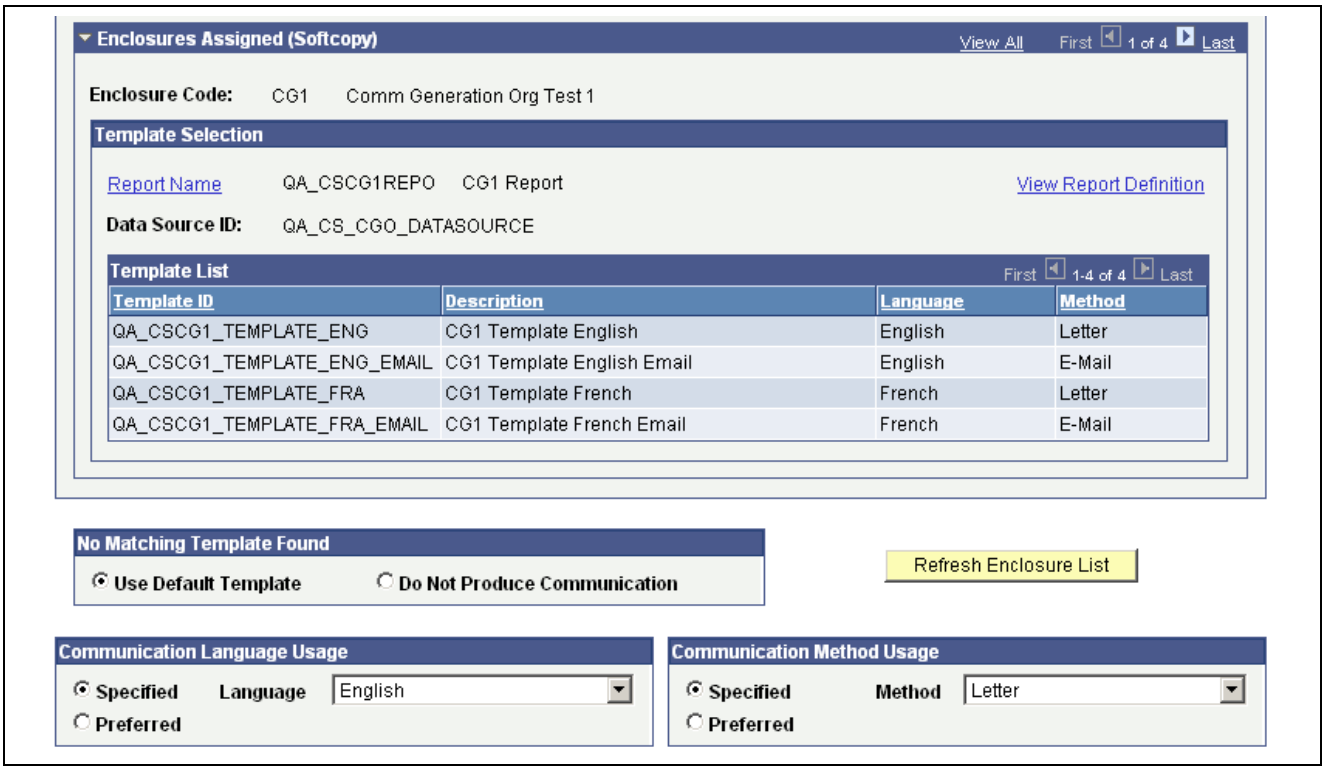

Selection Parameters page (2 of 2)

ID Selection

ID Selection

Select the type of IDs to process: *All IDs, All Person IDs, One Person ID, All Org IDs, One Org ID* or *Population Selection.* These are translate values and should not be modified.

Note. When the Population Selection value is selected, the IDs selected will be processed only if they have a communication assigned to them using the specified letter code, are within the communication date range, and are not yet completed. To assure that selected IDs have the desired letter code assigned, consider using the same population selection tool (same PS Query name, Equation Engine equation, or external file) inside the 3C Engine process to assign the desired letter code communication to the IDs.

Person ID

Available only when the ID Selection is *One Person ID.* You must enter the specific person ID to process here.

Organization ID

Available only when the ID Selection is *One Org ID.* You must enter the specific organization ID to process here.

Population Selection

This group box appears only when the ID Selection of *Population Selection* is selected.

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Population selection is a method for selecting the IDs to process for a specific transaction. The Population Selection group box is a standard group box that appears on run control pages when the Population Selection process is available or required for the transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. The fields behave the same way from within the group box on all run control pages and application processes

If your institution uses a specific selection tool (PS Query, Equation Engine equation, or external file) to identify IDs for a Communication Generation transaction, you must use it.

The PeopleSoft system delivers predefined sample queries to enable you to select person IDs, organization IDs, or both. The predefined queries are:

- QA_CS_CC_PS_COMMGEN - Population Selection and CommGen for PER.
- QA_CS_CC_PS_COMGEN_ORG - Population Selection and CommGen for ORG.
- QA_CS_CC_PS_COMMGEN_BOTH - Population Selection and CommGen for P+O.

The PeopleSoft system also delivers predefined sample equations to enable you to select person IDs, organization IDs, or both. The predefined equations are:

- CCCBPSPERS - Person only.
- CCCBPSORGS - Organizations only.
- CCCGPSBOTH - Person and organizations.

See lscc, Using the Population Selection Process.

Letter Code Selection

Letter Code

Enter the letter code to use.

Only letter codes set up for the Communication Generation process and that are currently assigned to the specified IDs are available. For example, if you select *All Person IDs* and the FAN letter code is not assigned to any ID, the FAN letter code is not available.

Note. If you select the ID Selection of Population Selection or All IDs, all letter codes enabled for the Communication Generation process are available. This is because the IDs to select are still unknown at this point

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See lscc, Setting Up Communications, Defining Letter Codes.

Administrative Function

Displays the administrative function associated with the letter code.

Report Name,Data Source ID, and **Template List**

Only the reports to which the report definition gives you security access, are available.

If the letter code is associated with only one report, the system displays the report name, the data source file, and a list of the templates associated with that report.

If the letter code is associated with more than one report, click Report Name to select the additional reports to use. When you select a report, the system displays the list of templates associated with that report along with the language and method for which the template is created. The Template List

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group box shows which template the system will use as a default template if there is no specified template.

Note. An error message appears if two or more template IDs have the same combination of language and method inside one report definition. The combination of method and language must be unique for the Communication Generation process to know which template to use for each ID generated.

See lscc, Setting Up Communications, Setting Up the Communication Generation Process, Creating a Template.

See *PeopleTools: Oracle BI Publisher for PeopleSoft.*

View Report Definition

Click to open a new browser window displaying the Report Definition search page. In the new browser window, enter the report name or other information about the definition that you want to view and click Search to access the Report Definition component for the report. View the definition to confirm that it is the definition that you want to make available and to preview the templates.

You can make changes to the report definition if you have security access to the page.

Enclosures Assigned (Softcopy)

Enclosure Code,Data Source ID, and **Template List**

If the letter code includes softcopy enclosures for the IDs, the system displays each enclosure code and its relevant information. Enter the report name to use for each enclosure.

If no softcopy enclosures are included, the system collapses the group box.

Note. If you select the ID Selection of *Population Selection*, you must select a report definition for all the enclosure codes that were included in the Person/Org Communication Management component when the letter code was assigned. This is because the IDs to select are still unknown at this point.

Refresh Enclosure List

Click to cause the Enclosures Assigned (Softcopy) section to include all available softcopy enclosures including enclosures that were added to the system since the last refresh of the process run control ID.

Refresh the list of enclosures periodically to make sure you are processing the communications appropriately in scheduled runs of the process. Failure to refresh the list could result in producing missing enclosures for some IDs.

For example, assume that you schedule a run control ID of *AAA* to run every night to generate a communication for all IDs that have the letter code *ABC* assigned. The next day, an administrator assigns letter code *ABC* to John Smith and includes enclosure *XYZ.* XYZ is not already included in the Enclosures Assigned (Softcopy) group box for run control *AAA.* If you don't refresh the list to cause *XYZ* to be included before the next run, the process will not generate the XYZ letter for John Smith.

Report Name, Data Source, and **Template List**

These fields behave the same in the Enclosures Assigned (Softcopy) group box as in the Letter Code Selection group box

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No Matching Template Found

Use Default Template or **Do Not Produce Communication**

Select an option to specify what to do if the language and method combination to use for an ID is not listed in the template list for the report name selected.

Select Use Default Template to use the template set as the default inside the report ID, or select Do Not Produce Communication to not produce the communication for an ID where no template is found.

For example, if in the Communication Language Usage section the language to use is *Preferred* and the preferred language of the ID is *Italian* but no Italian template is associated with the specified report, do you want the system to use the default template, which in this case is the *English Letter* template, or do you want the system to skip the communication for that ID?

Note. The option that you select applies to the main letter code, not to the enclosures. The process assumes that the report definition contains an enclosure code with at least one language and method combination that is the same as the one set for the main letter code. If the system does not find at least one that is the same, a message appears when you try to save the run control component or when the process runs and encounters the problem.

Communication Language Usage

Select options in this group box and in the Communication Method Usage box, to identify the template for the Communication Generation process to use.

Specified and **Language,** or **Preferred**

The system selects the Specified option by default and sets the Language field to the base language that was set at installation. You can change the language to use, however, the Template List group box for the main letter code must include a template that uses the language that you specify.

If your institution supports language preferences, you can select Preferred to cause the system to evaluate and use the preferred language of each ID if any. When Preferred is selected, the Language field becomes unavailable.

If your institution did not set communication preferences to *Support multiple languages* on the Installation CC page, then the system automatically selects the Specified option and makes both the Specified and Preferredoptions unavailable. You must specify the language to use.

Communication Method Usage

Select options in this group box and in the Communication Language Usage group box, to identify the template for the Communication Generation process to use.

Specified and **Method,** or **Preferred**

The system selects the Specified option by default and sets the Method field to *Letter.* You can change the specified method, however the Template List group box for the main letter code must include a template that uses the method that you specify.

If your institution supports method preferences, you can select Preferred to cause the system to evaluate and use the preferred method of each ID. When Preferred is selected, the Method field is unavailable.

If your institution did not set communication preferences to *Support multiple methods* on the Installation CC page, then the system automatically selects

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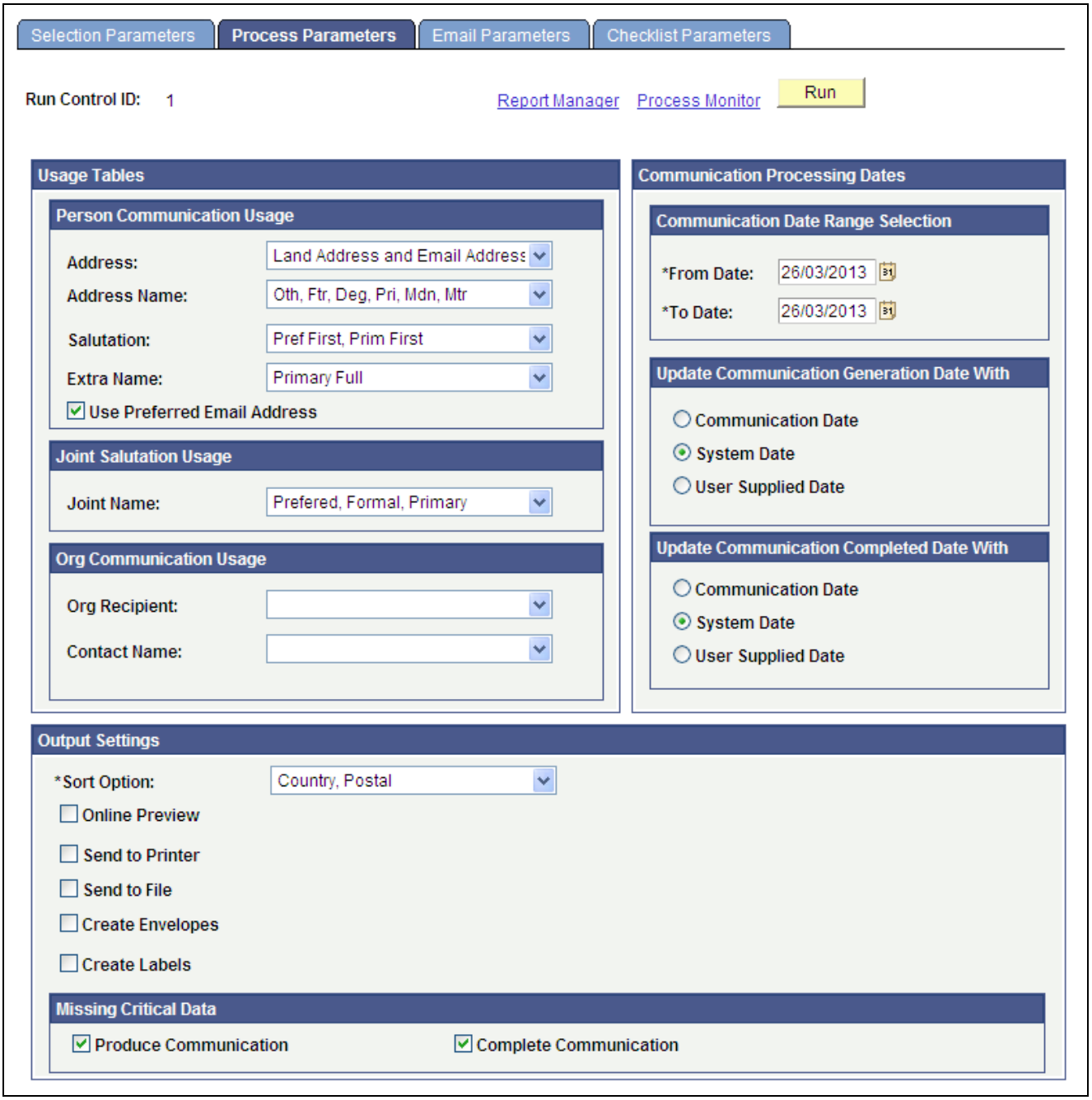
the Specified option and makes both the Specified and Preferredoptions unavailable. You must specify the method to use.

Entering Process Parameters

Access the Process Parameters page (Campus Community, Communications, Communication Generation, Process Parameters).

Bundle 29

The Use Preferred Email Address check box is added for Person communications.



Process Parameters page

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Person Communication Usage

Fields in this group box are available for input only if the ID Selection field on the Selection Parameters page is set to *All IDs, All Person IDs, One Person ID,* or *Population Selection.*

If the field is available, you must enter the usage to use for searching for data for that field.

Address

Enter the type of address, from the Address Usage page, to extract for this communication. You can list address types in a preferred search-and-use order. For example, if you list an address usage that contains mailing, billing, and home address types, the system searches for the mailing address first; if none exists, then for the billing address; if none exists, for the home address last.

Warning! If the Communication Generation process encounters IDs that are set to receive an email but the address usage does not include email types, the process cannot send the email and therefore will not generate the communication for those IDs. When the method selected on the Selection Parameters page is *Email* or *Preferred*, then the address usage must include email types or a combination of address types and email types; at least one template for the main letter code must be for emails.

Address Name

Enter the type of name, from the Name Usage page, to extract for the address section of this letter. As with addresses, you can list address name types in a preferred search-and-use order.

Salutation

Enter the type of name, from the Name Usage Table page, that the system should extract for use in the opening or salutation of this communication. For example, you might want to use the individual's primary full name in the address section of the letter, but use his preferred first name in the salutation (Dear Dave). As with addresses, you can list salutation name types in a preferred search-and-use order.

Extra Name

The extra name is an additional way to extract name data using the name usage. For example, you might want to use the individual's primary full name in the address section of the letter (Mr. Juan M. Dominguez), his preferred first name in the salutation (Dear Juan), and his last name in the text to say "We are sure the Dominguez family will enjoy participating in this event." As with addresses, you can list ID name types in a preferred search-and-use order.

Use Preferred Email Address

Bundle 29
New

Select this check box to use the preferred email address (as indicated on the Electronic Addresses page) for this communication.

See lscc, Designing Campus Community.

Joint Salutation Usage

The Joint Name field is available for input only if the ID Selection field on the Selection Parameters page is set to *All IDs, All Person IDs, One Person ID,* or *Population Selection,* and only if the letter code is set to permit joint communications. The available Joint Name values are applicable values from the Name Usage Table.

If the field is available, you must enter the name type to use in the salutation for joint communications.

See lscc, Designing Campus Community.

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Org Communication Usage

Fields in this group box are available for input only if the ID Selection field on the Selection Parameters page is set to *All IDs, All Org IDs,One Org ID,* or *Population Selection.*

If the field is available, you must enter the usage to use for searching for data for that field.

Org Recipient Enter the usage for the process to evaluate. The process evaluates this usage to find and retrieve the recipients to use for the organization communication.

Contact Name Enter the usage for the process to evaluate. The process evaluates this usage to find and the name type to use in the output for each organization recipient contact.

See lscc, Setting Up Communications, Setting Up the Communication Generation Process, Defining Organization Communication Recipient Usages.

Communication Date Range Selection

Enter the date range of the communication records from which to extract data. For example, you might want to extract data only from IDs to which you assigned a specific letter code and set the communication date to between January 1 and March 1 of the current year.

The From and To date ranges are inclusive of the dates that you enter.

Update Communication Generation Date With

Select the date to use as the date when the communication is generated. When the Communication Generation process finishes, it enters this date in the Communication Generation Datefield in the Communication Management component for persons or organizations as appropriate.

Communication Date Select to use the communication assignment date from the Person Communication page for individuals or the Organization Communication page for organizations, to use as the date of generation.

System Date Select to extract the current system date to use as the date of generation.

User Supplied Date Select to use the specified date as the date of generation. You must supply the desired date.

Update Communication Completed Date With

Select the date for the system to use as the communication completed date on the communication record.

Communication Date Select to use the date when the communication was assigned as the communication completed date.

System Date Select to use the current system date as the communication completed date.

User Supplied Date Select to use the specified date as the communication completed date. You must supply the desired date.

Output Settings

Specify how to sort the generated outputs. You can choose to preview a sample of the outputs before running the process, or if the communication is a letter, you can choose to send the output directly to the printer for printing.

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Warning! If you do not select either Preview Online or Send to Printer, when the process runs it generates the communication. If, in the Standard Letter Table CS component, Letter Printed Data is set to either *Name/Address Only* or *All* for the letter code, then the process saves the data indicated and inserts the View Generated Communication link in the Person or Organization Communication Management components. You must manually navigate to the Communication Management component for each of the processed IDs to view or print the final outputs individually. If the Letter Printed Data is set to *None* for the letter code, the process generates the communications, but does not save data or make the output retrievable. If the communication is an email, the process sends the email to the specified IDs.

Sort Option

Enter how to sort the generated outputs.

Available options are:

All Alphabetically by ID Type to sort first, organization communications sorted alphabetically by the first letter of each recipient's name, contact, department, or location name depending on how the output is addressed, and then individual communications alphabetically by each recipient's last name/first name.

Country, Postal (default value) to sort by each recipient's postal or zip code. Use this sort option to streamline mass mailings sent through the postal service.

Country, Postal by ID Type to sort first, organization communications by each recipient's country and postal address, and then individual communications by each recipient's country and postal address.

Online Preview

Select to preview the output online in PeopleSoft Report Manager.

When selected, the system sends a sample of all related outputs to PeopleSoft Report Manager with corresponding links for you to click to preview each output. For example, if an ID has two enclosures and three communication recipients, Report Manager displays a total of 12 document links labeled with the report definition name for each letter code and the name of each recipient. One document link is for the main letter code output and two links are for the enclosures associated with the main ID. The same links appear for each of the three recipients.

Note. Previews do not cause communications to be marked *Completed* and no information is entered in the Person or Organization Communication Management components for the communication.

When generating communications for multiple IDs, the online preview functionality extracts data for previews of only the first 10 IDs and their enclosures and recipients.

Email Address

If the communication method usage is either *Email* or *Preferred* on the Selection Parameters page and the *Online Preview* check box is selected, then the Email Address field appears.

Enter an email address whose inbox you can access to see how the emails will be sent. When you provide an email address for online previewing, the generated outputs do not appear in the PeopleSoft Report Manager.

Continuing with the example from the Online Preview field, the email address that you enter will receive four different emails: one for the main ID and one for each of the three recipients. The enclosures will be attachments to the emails. If an email is missing for a specific recipient, it is probably

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because no email address exists in the Related ID (or Name) field in the Relationships component.

Note. The Communication Generation process uses the main letter code template as the body of the email text. To do so, the process automatically converts the format of the main letter template to HTM format. Enclosures, if assigned, are not converted. The process includes them as attachments using the default output format set in the report definition.

See lscc, Managing Biographical Information, Managing Relationships Data, Entering Relationship Addresses.

See *PeopleTools: PeopleSoft Process Scheduler, "Using Report Manager."*

Send to Printer and **Destination Printer**

If the communication method usage is either *Letter* or *Preferred* on the Selection Parameters page, then the *Send to Printer* option is available.

Select the check box to send letter communications directly to the printer. When selected, the Destination Printer field appears. You must enter the path to the printer.

When you are generating letters, you can retrieve the output at the specified printer or by clicking the View Generated Communication link in each processed ID's Person or Organization Communication component (if the letter code is set to save the data to the communication record), or both.

Note. If, on the Selection Parameters page, the communication method usage is *Email* or the Online Preview check box is selected, then the Send to Printer option is unavailable. You cannot send an email to the printer, nor can you send communications set to Online Preview to the printer.

See lscc, Setting Up Communications, Defining Letter Codes, Setting Up a Letter Code.

See *PeopleTools: Oracle BI Publisher for PeopleSoft.*

Send to File and **File Path**

If the communication method usage is either *Letter* or *Preferred* on the Selection Parameters page, then the *Send to File* option is available.

Select the check box to save the generated letter communications as a single file. When selected, the File Path field appears. You must specify the file path to use.

When the process runs, it sorts and merges all the final letters into one file and saves it to the file path that you entered. The filename is *CommGen_<process instance nbr>.pdf*, where *<process instance nbr>* is the unique process instance number assigned by the Communication Generation process for that run.

You can use the file to make last-minute changes to the communications or send to a third-party vendor such as a mailing company.

Note. If, on the Selection Parameters page, the communication method usage is *Email* or the *Online Preview* check box is selected, then the *Send to File* option is unavailable. You cannot save an email to a file, nor can you save communications set to *Online Preview* to a file.

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When you are generating letters, you can retrieve the output from the file at the destination you specify or by clicking the View Generated Communication link in each processed ID's Person or Organization Communication component (if the letter code is set to save the data to the communication record), or both.

Note. The file created is a .pdf file regardless of the format type defined in the report definition associated with the letter code.

See lscc, Setting Up Communications, Defining Letter Codes, Setting Up a Letter Code.

See *PeopleTools: Oracle BI Publisher for PeopleSoft.*

Create Envelopes, Create Labels and **Report Name**

If the communication method usage is either *Letter* or *Preferred* on the Selection Parameters page, then the *Create Envelopes* and *Create Labels* options are available.

Select the appropriate check box to generate envelopes or address labels for the letter communications.

When selected, the Report Name link appears. You must select the report definition for the Communication Generation process to use. The report definition enables the process to retrieve address information from the associated data source to merge into the appropriate envelope or label template.

Only the report definitions that are created with a data source configured with the same administrative function used in the main letter code are available. For example, if the main letter code has a data source configured for the ADMA administrative function, then only the report definitions created with a data source set up for administrative function ADMA are available for envelopes and labels.

Warning! The Communication Generation process does not re-extract data for envelopes and labels. It reuses the data extracted for the main letter code report definition to merge inside the envelope or label template. This ensures consistency between the address, the salutation information printed on the letter, and the name and address on the envelopes and labels. If you need to extract additional data to include on the envelopes or labels (for example, you might want to print the name of the admissions recruiting center for the ID on the envelope or label), then you must include the data inside the data source of the report definition for the main letter code. If the data is not in the data source for that report definition, it will not be extracted.

When the *Send to File* option is selected and you select *Create Envelopes* or *Create Labels*, the process sorts and merges all the address data into one file and saves it to the file path that you entered. The process applies the salutation, address, and sort order specified for the main letter to the corresponding envelopes and labels.

The filename for envelopes is *CommGenENV_<process instance nbr>.pdf* and the filename for labels data is *CommGenLBL_<process instance nbr>.pdf*, where *<process instance nbr>* is the unique process instance number assigned by the Communication Generation process for that run.

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Note. When *Send to File* is selected, the file format is always .pdf regardless of the format type defined in the Report Definition used for generating the labels or envelopes

When the letter code is set to save data to the communication record and the *Create Envelopes* option is selected, the Communication Generation process saves the respective envelope inside each processed ID's Person or Organization Communication Management component. Click the View Generated Communication link, and then the View Envelope link to view and reprint the envelope if needed.

See lscc, Setting Up Communications, Defining Letter Codes, Setting Up a Letter Code.

See lscc, Managing Communications.

Note. The *Create Labels* option does not make the generated label available inside the Person or Organization Communication Management component for the IDs processed. Use the *Create Envelopes* option to recreate the label if needed.

Envelope Printer and **Label Printer**

If the *Send to Printer* check box is selected and you select the *Create Envelopes* or *Create Labels* options, the Envelope Printer or Label Printer field appears. Enter the path to the printer that is set up to print envelopes or to the printer that is set up to print labels.

Report Definitions for labels and envelopes must use the same administrative function as the administrative function associated with the main letter code. Consider creating report definitions and data sources for each administrative function that you use. The following table provides an example of delivered elements for labels and envelopes for three sample administrative functions.

Admin Function	Data Source	Label Template	Envelope Template	Label Report Definition	Envelope Report Definition
ADMA	QA_CS_ LBLENV_ ADMA	QA_CS_CC_ LABEL.rtf	QA_CS_CC_ ENVELOPE.rtf	QA_ CSLBLADMA	QA_ CSENVADMA
AVIN	QA_CS_ LBLENV_AVIN	QA_CS_CC_ LABEL.rtf	QA_CS_CC_ ENVELOPE.rtf	QA_ CSLBLAVIN	QA_ CSENVAVIN
GEN	QA_CS_ LBLENV_GEN	QA_CS_CC_ LABEL.rtf	QA_CS_CC_ ENVELOPE.rtf	QA_CSLBLGEN	QA_CSENVGEN

See lscc, Setting Up Communications, Setting Up the Communication Generation Process, Creating a Data Source File.

See *PeopleTools: Oracle BI Publisher for PeopleSoft, "Creating Report Templates."*

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Warning! When generating letters, you must select either *Send to File* or *Send to Printer* to ensure the ability to retrieve and view the letter outputs. If you do not select either *Send to File* or *Send to Printer*, you must manually navigate to each processed ID's communication component to retrieve and view the output. However, the output is in the communication record only if the assigned letter code is set to save it there.

For emails, the process automatically sends the generated communication to each processed ID. You cannot retrieve and view an email output before sending. You can however, select *Send to File* or *Send to Printer* to retrieve and view the email that was sent.

See lscc, Setting Up Communications, Defining Letter Codes, Setting Up a Letter Code.

Missing Critical Data

Produce Communication Select this check box for the process to produce the communication even if critical data is missing, for example, even if address information or name of the recipient is missing.

Complete Communication Select this check box for the process to set the status to *Complete* on the communication record, even if critical data is missing.

Critical data is set in the Communication Data Source component.

Note. If Email Address for Person for individuals or Organization Recipient Email and URL information for organizations, is not marked as critical data, the process considers the email address to be critical data for generating an email.

See lscc, Setting Up Communications, Setting Up the Communication Generation Process, Creating a Data Source File.

Entering Email Parameters

Access the Email Parameters page (Campus Community, Communications, Communication Generation, Process Parameters).

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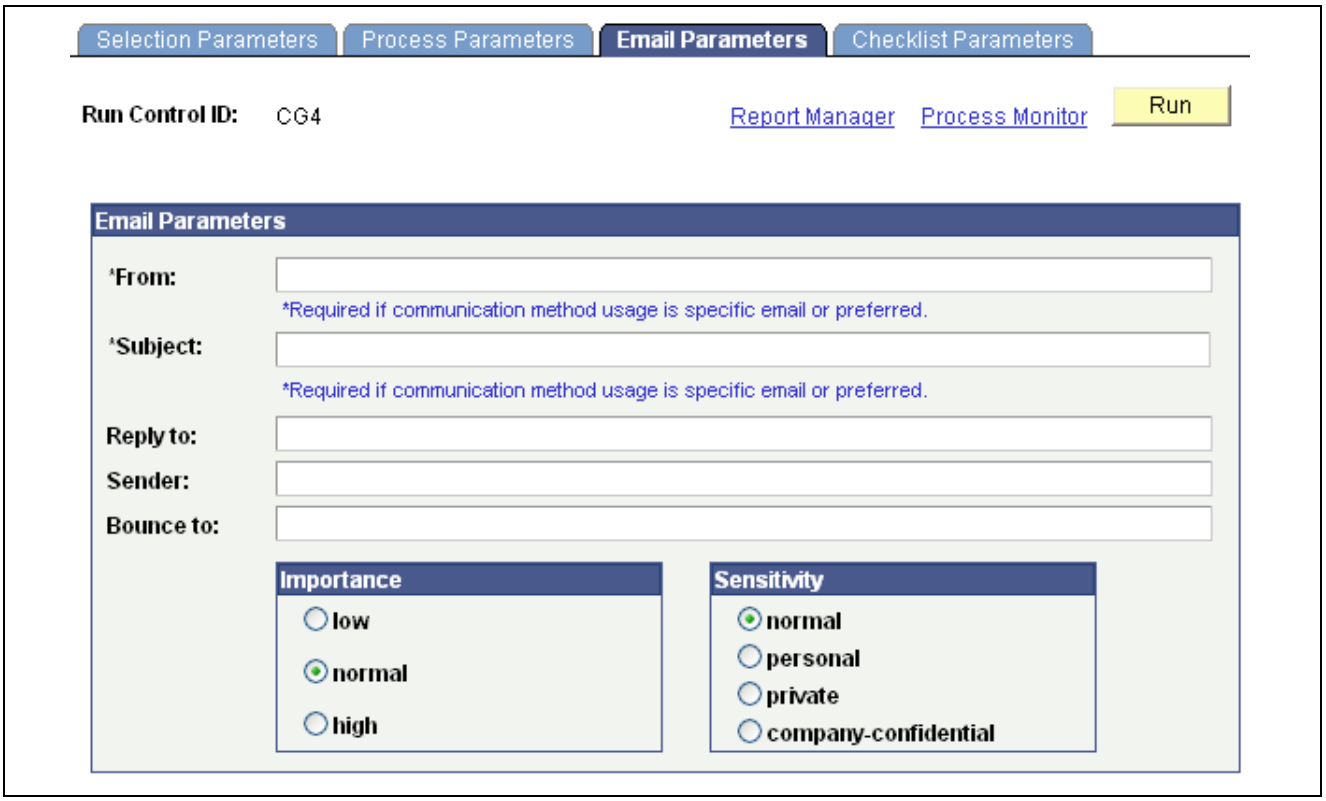

Email Parameters page

From

Enter the email address of the person or entity that is sending the email.

This email address will replace any default email address that your institution's server might use to indicate from whom an email was sent. You can use this for cosmetic appearance. For example, if the Registrar Office sends the email, you might enter *Registrar_Office@university.com.* The email address may be valid or not. If it is not, your template should include text similar to: *This email was sent by an automated system. Do not reply to this email address.*

This field is required if the communication method usage is *Specific Email* or *Preferred.*

Subject

You can enter email subjects for each email template language encountered on the Template Selection group box on the Selection Parameters page.

If the Communication Language Usage option is set to *Preferred* on the Selection Parameters page then the system generates subject fields for each email template language encountered in the Template Selection group box. If zero or one email template is found, or if the Communication Language Usage option is set to *Specific*, then a single Subject field appears on this page.

All Subject fields require a value when the Communication Language Usage option is set to *Preferred* and the Communication Method Usage option is set to either *Preferred* or *Email Specific.*

When you click the Run button, the Communication Generation process (SCC_COMMGEN) retrieves the appropriate subject field from the SCC_CG_EML_RCTL table based on the email template language used to generate the communication.

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Reply to, Sender, and **Bounce to**

(Optional) Enter values if your institution's email service uses these fields when sending emails.

The Reply to email address must be valid. This is the email address that will appear when the recipient replies to the sender. It overrides the Fromemail address.

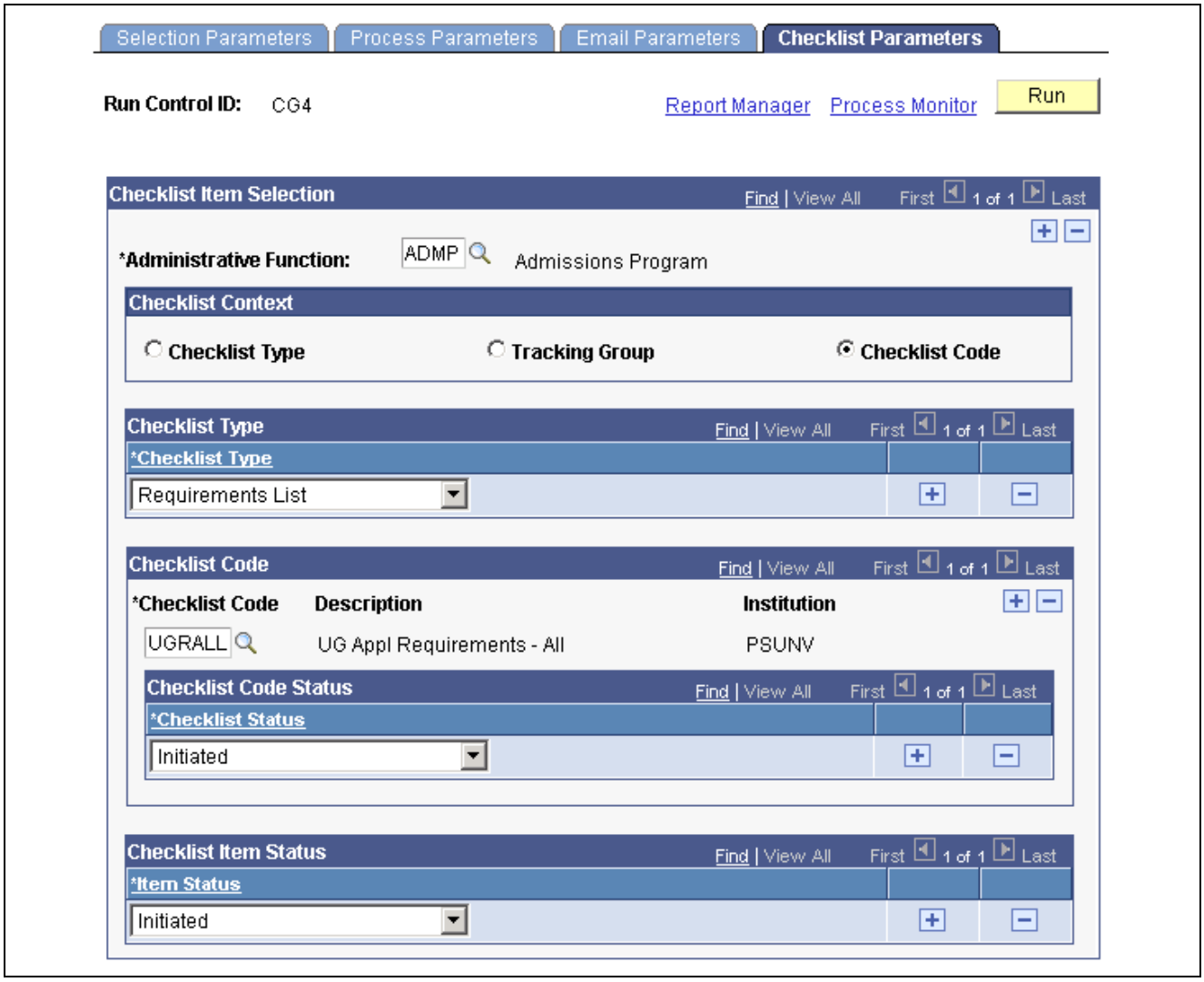
The Bounce To address is a valid email address set to receive all emails that do not send successfully.

Importance and Sensitivity

Options that you select in these group boxes appear in the email transmission for the recipient to see.

Entering Checklist Parameters

Access the Checklist Parameters page (Campus Community, Communications, Communication Generation, Email Parameters).



Checklist Parameters page

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Checklist Item Selection

Administrative Function

Enter the administrative function associated with the checklists to use.

If the checklists that you want to use are associated with different administrative functions, use the add button to enter each administrative function and select the checklists and items associated with that function.

Checklist Context

Checklist Type, Tracking Group, or **Checklist Code**

Select the context by which to select the checklists to extract.

The fields on the page change based on the checklist context that you select.

Checklist Type

This group box appears regardless of which context you select.

Checklist Type

Enter the types of checklists from which the process should extract data for this letter or email.

You can select more than one checklist type for an administrative function. For example if you select *Requirement List*, the process extracts checklist information for checklist codes set up with that checklist type.

Checklist Code and Checklist Code Status

This group box appears only if you select a Checklist Context of *Checklist Code.*

If you select *Checklist Code*, then you must select a checklist status to use. The process will include only checklist codes with the status that you specify. You can select more than one checklist code for an administrative function and more than one checklist status for each checklist code.

Institution

Enter the institution related to the desired checklist. Often the same checklist codes are shared by more than one institution, and the system needs to use the correct one.

Checklist Code

Enter the specific checklist codes whose checklist item data should be extracted for this letter or email.

You can specify more than one checklist code.

Checklist Status

Select the status of the checklists from which to extract data for this letter or email.

You can select either the status of *Completed* or *Initiated*, or you can add a row to list both.

Tracking Group and Tracking Group Status

This group box appears only if you select a Checklist Context of *Tracking Group.*

If you select *Tracking Group*, then you must select a group status to use. The process will include checklist items assigned to the tracking group and tracking group status that you specify. You can select more than one tracking group for an administrative function and more than one group status for each tracking group.

Tracking Group

Enter the tracking group codes whose checklist item data should be extracted for this letter or email.

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You can enter more than one tracking group for an administrative function.

Group Status Select the group status from which to extract checklist data for this letter or email.

You can select *Completed* or *Initiated,* or you can add a row to select both.

Checklist Item Status

Regardless of the context that you select, you must specify the checklist item status to use. You can select more than one checklist item status for an administrative function.

Available checklist item status values include: *Completed, Waived, Notified, Second Notification,* and so on.

See lscc, Setting Up Checklists.

Resetting Generated Communications

A successful run of the Communication Generation or Letter Generation process updates the following items on the communication record for each processed ID:

- Communication Generation Datefield.
- Communication Completed option.
- Date Activity Completed field.
- Unsuccessful Outcome option with its Reason field.
- Language, Method, and Process Used fields.
- View Generated Communication link (only for Communication Generation process and if setup allows it).

When the items are updated, the process sets the communication to *Communication Completed,* and neither the Communication Generation process nor the Letter Generation process will process that ID again for that communication.

If you need to generate the communication again or reset the fields (for example, if you mistakenly used the wrong template or selected the wrong IDs to process), then you must either manually navigate to each processed ID's Person or Organization Communication Management component and clear the Communication Completed check box, or use the Reset Communications page to reset the communication.

You can specify which of the processed IDs to reset: *All IDs, All Person IDs, All Org IDs, One Person ID,* or *One Org ID.*

Resetting clears the information from the communication record, refreshes the processing tables, and deletes from the XML storage tables. The Letter Generation process does not use processing tables that need to be refreshed.

Note. You must run reset the communication to refresh the processing tables if the Communication Generation process ends abnormally.

This section discusses how to reset the communication.

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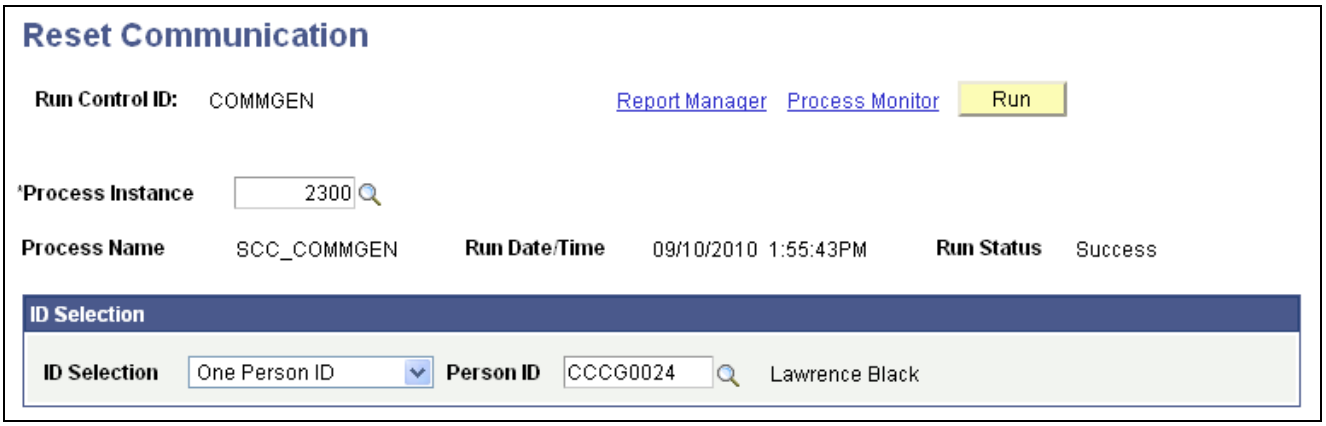
Page Used to Reset Generated Communications

Page Name	Definition Name	Navigation	Usage
Reset Communication	SCC_CG_RESET	• Campus Community, Communications, Reset Communication • Contributor Relations, Communications, Process Communications, Reset Communication • Contributor Relations, Session Management, Acknowledgements, Generate Acknowledgements, Reset Communication	Reset the communications generated by the Communication Generation process or the Letter Generation process by clearing the Communication Completed check box and resetting the other values populated by the processes. Also reset the Communication Generation process tables if the process ended abnormally.

Resetting a Communication

Access the Reset Communication page (Campus Community, Communications, Reset Communication).



Reset Communication page

Process instance, Run Date/Time, and **Run Status**

Select the process instance number for which you want to reset a generated communication.

Process instance numbers are available only for a process run status of *Success, No Success, Warning, Delete, Error,* or *Cancelled.*

When the process instance number has a run status of *Success,* the Reset Communication process clears all process information that the Communication Generation process or the Letter Generation process added to the communication record for each processed ID.

When the process instance number has a run status of *No Success, Warning, Delete, Error,* or *Cancelled,* the Reset Communication process clears all of the processing tables, so that you can run the process to generate the communication again.

ID Selection, Person ID, and **Org ID**

Specify which IDs within the process instance to reset. Only the IDs generated in the specified process instance are available.

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- Enter *All IDs* to reset all of the processed IDs.
- Enter *All Person IDs* or *All Org IDs* to reset all of the person IDs or all of the organization IDs that were processed.
- If you enter *One Person ID* or *One Org ID*, the Person ID or the Org ID field appears. You must enter the ID.

Click the Run button to invoke the SCC_CG_RESET Application Engine process. The system does the following:

1. Clears rows in the process tables that were used for the specific Communication Generation run.

   The process tables are: SCC_COMMGEN_AET, SCC_CG_PRCS_AET, SCC_CG_MERG_TBL, SCC_CG_PRCS_TBL and SCC_CG_TRGT.
2. Identifies the communications to reset based on the ID Selection dropdown on the run control page.
3. For each communication identified in step 2, deletes from the XML storage tables (SCC_CG_ATTDET, SCC_CGR_ATTREL, SCC_ORG_CTC_ATT, SCC_ORG_DPT_ATT and SCC_ORG_LOC_ATT).
4. For each communication identified in step 2, updates the process-related fields on the PS_COMMUNICATION table:
   - COMPLETED_COMM=’N’
   - COMPLETED_ID=’ ’
   - COMPLETED_DT =%DateNull
   - UNSUCCESSFUL=’N’
   - OUTCOME_REASON=’ ’
   - LETTER_PRINTED_DT=%DateNull
   - PROCESS_INSTANCE=0
   - SCC_COMM_MTHD=’ ’
   - SCC_COMM_LANG=’ ’
   - SCC_COMM_PROC=’ ’

Reviewing Communications

This section discusses how to:

- Review extract data for a communication.
- Review extract data for an additional individual recipient.
- Review a summary of communications.
- Review 3C Group access to a communication.
- Review details of a communication.

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Pages Used to Review Communications

Page Name	Definition Name	Navigation	Usage
Communication Letter Data	COMM_LTR_DATA	Campus Community, Communications, Person Communications, Communication Letter Data	Review extract data for a communication assigned to an individual. This page can only be updated by Letter Generation extract process.
Organization Communication Letter Data	ORGCOMM_LTR_DATA	Campus Community, Communications, Organization Communications, Org Communication Letter Data, Communication Letter Data	Review extract data for a communication assigned to an organization. This page can only be updated by Letter Generation extract process.
Communication Recipient Data	COMM_RECPNT_DATA	• Campus Community, Communications, Person Communications, Communication Letter Data, Communication Recipient Data • Campus Community, Communications, Person Communications, Communication Management, Communication Recipient Data • Contributor Relations, Communications, Communications - Person, Communication Letter Data, Communication Recipient Data • Contributor Relations, Constituent Information, People, Communications, Communication Letter Data, Communication Recipient Data • Contributor Relations, Constituent Information, People, Communications, Communication Management, Communication Recipient Data • Contributor Relations, Communications, Communications - Person, Communication Management, Communication Recipient Data	View data for an additional individual recipient.

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Page Name	Definition Name	Navigation	Usage
Communication Summary	COMM_SUMMARY	• Campus Community, Communications, Person Communications, Communication Summary • Student Admissions, 3 C's and Event Summaries, Communication Summary • Student Recruiting, 3 C's and Events Summaries, Communication Summary • Contributor Relations, Communications, Communications - Person, Communication Summary • Contributor Relations, Constituent Information, People, Communications, Communication Summary • Self Service, Outreach, View person information, Constituent Information, Communication Summary • Records and Enrollment, 3 C's Summaries, Communication Summary • Student Recruiting, Student Recruiters, Summaries, Communication Summary	Search for and review a summary of communications to or from an individual.

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Page Name	Definition Name	Navigation	Usage
Org Communication Summary	ORG_COMM_SUMMARY	• Campus Community, Communications, Organization Communications, Org Communication Summary • Contributor Relations, Communications, Communications - Organization, Communication Summary - Org, Org Communication Summary • Contributor Relations, Constituent Information, Organizations, Communications, Org Communication Summary • Self Service, Outreach, View Organization Information, Constituent Information - Org, Communication Summary	Review communications with an organization.
Operator 3C Groups Summary	OPR_GRP_3C_SUM	• Campus Community, Communications, Person Communications, Communication Summary, Operator 3C Groups Summary • Campus Community, Communications, Organization Communications, Org Communication Summary, Operator 3C Groups Summary	View 3C group inquiry and update access to communications with individuals or organizations.
Person Communication Management	COMM_MGMT1	Campus Community, Communications, Person Communications, Communication Detail, Communication Detail	View details of a communication assigned to an individual.
Org Communication Detail	ORG_COMM_MGMT1	Campus Community, Communications, Organization Communications, Org Communication Detail	View the details of a communication assigned to an organization.

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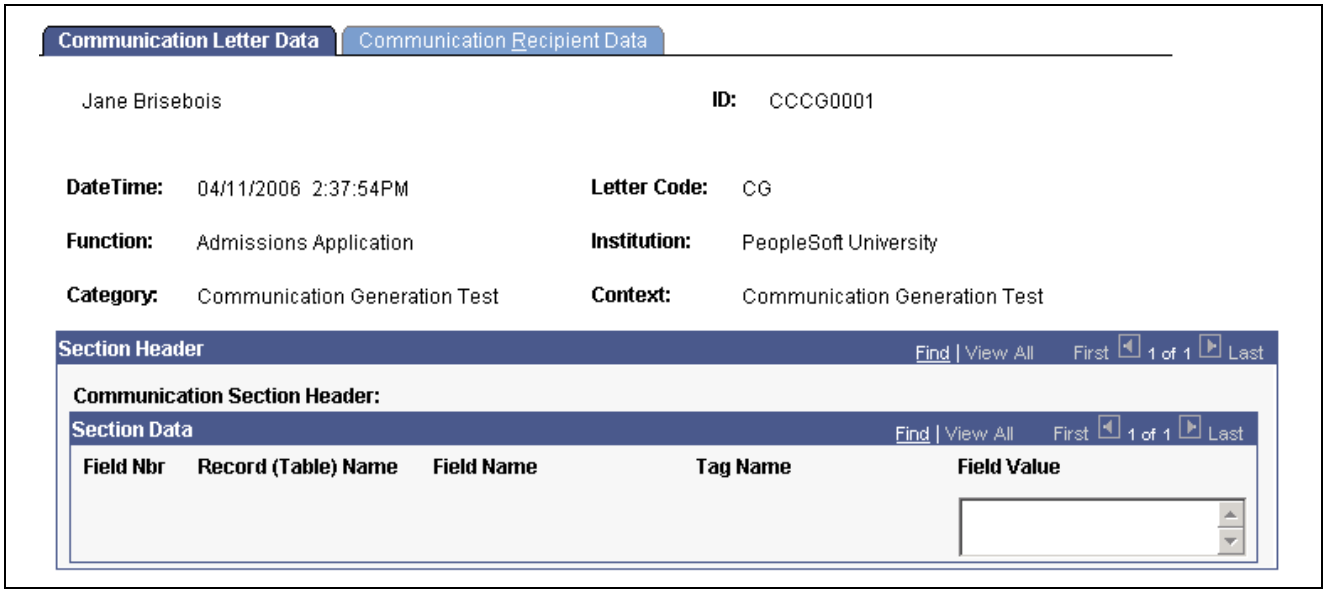
Page Name	Definition Name	Navigation	Usage
Organization Comm Recipients	ORG_COMM_MGMT2	• Campus Community, Communications, Organization Communications, Org Communication Detail, Organization Comm Recipients • Contributor Relations, Constituent Information, Organizations, Communications, Organization Communication • Contributor Relation, Communications, Communications - Organization, Organization Communication	View the details of the recipients set to receive a communication that is assigned to an organization.

Reviewing Extract Data for a Communication

Access the Communication Letter Data page (Campus Community, Communications, Person Communications, Communication Letter Data) or the Organization Communication Letter Data page (Campus Community, Communications, Organization Communications, Org Communication Letter Data, Communication Letter Data).



Communication Letter Data page

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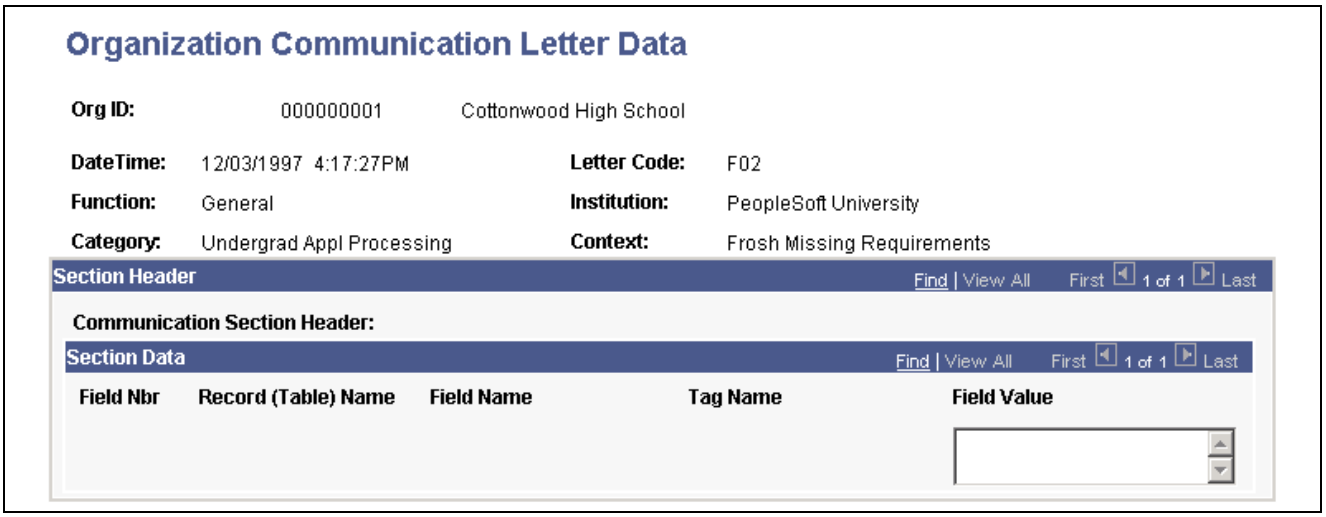

Organization Communication Letter Data page

The Communication Letter Data page and the Organization Communication Letter Data page are for viewing purposes only; you cannot enter or modify data. Information on this page is controlled from the Letter Printed Data value set in the Standard Letter Table CS component. Use this page to review the data extracted for an ID as the result of the Letter Generation process.

Note. The Communication Generation process does not update the page. Instead it makes the final outputs accessible from View Generated Communication link in the Person and Organization Communication components.

Reviewing Extract Data for an Additional Individual Recipient

Access the Communication Recipient Data page (Campus Community, Communications, Person Communications, Communication Letter Data, Communication Recipient Data).

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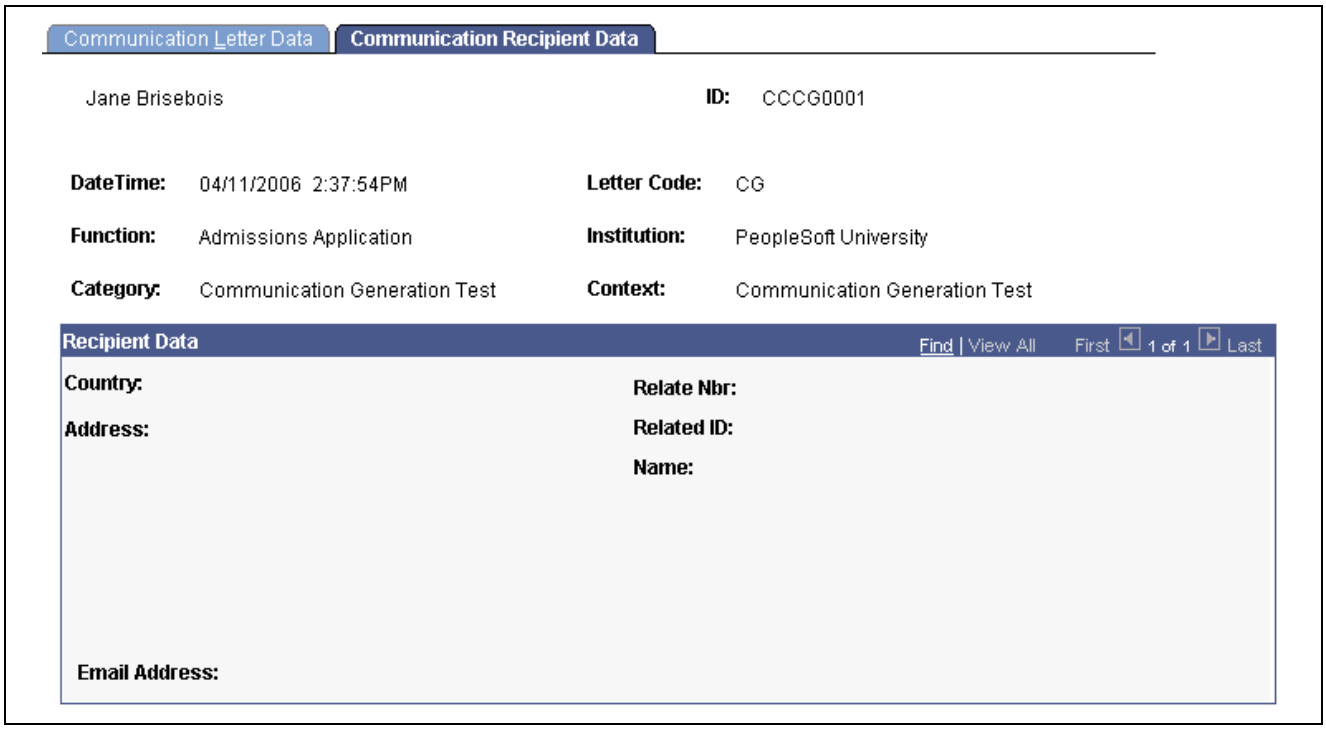

Communication Recipient Data page

The Communication Recipient Data page is view-only; you cannot enter or modify data. Information appears on this page only if you have set up a separate recipient on the Communication Recipient page in the Relationships component for the specified letter code. The page is updated by both Letter Generation and Communication Generation process.

Reviewing a Summary of Communications

Access the Communication Summary page (Student Admissions, 3C's and Event Summaries, Communication Summary) or the Org Communication Summary page (Campus Community, Communications, Organization Communications, Org Communication Summary).

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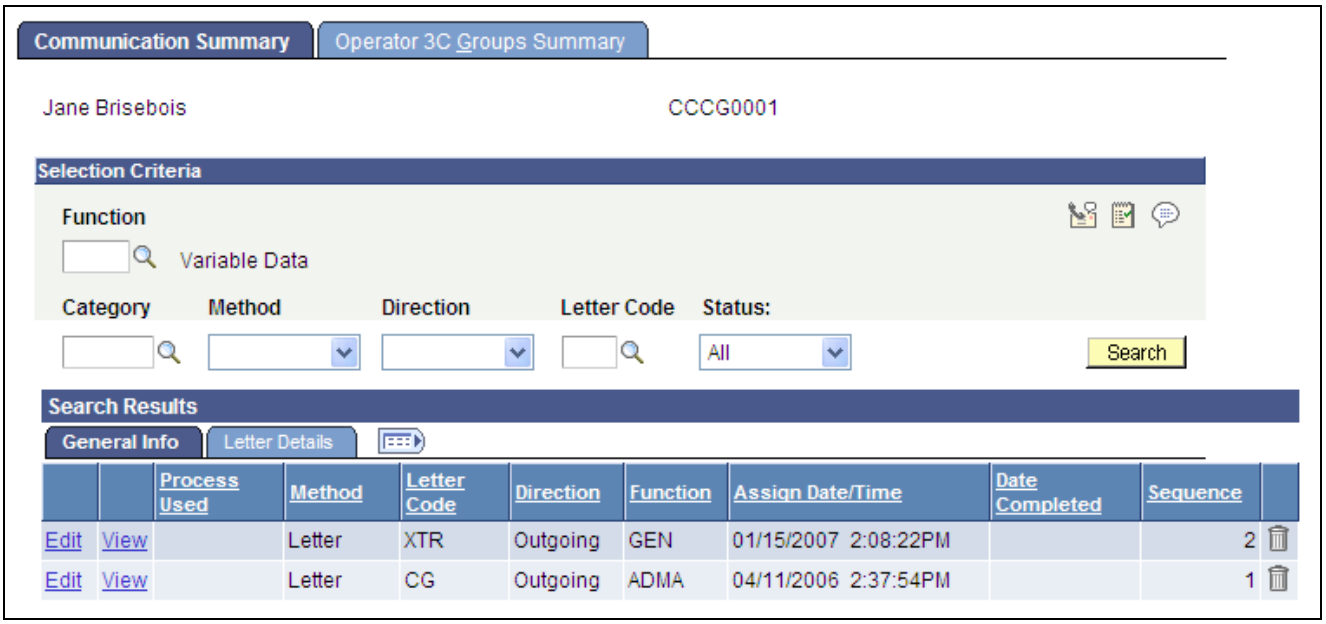
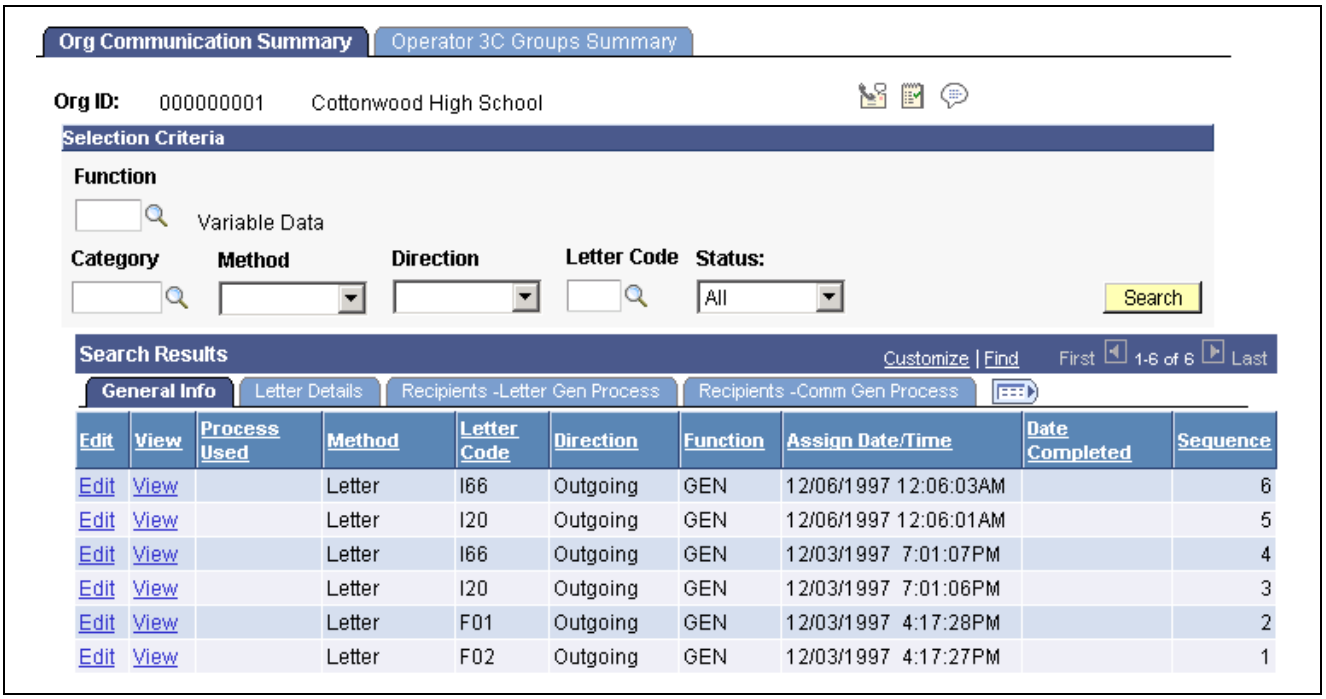


Communication Summary page



Org Communication Summary page

Note. Multiple views of the page are available by clicking the tabs in the group box. We document fields that are common to all views first.

Common Page Information: Selection Criteria Region

If you click the Search button without entering any values, the system searches for all communications for the individual or organization and displays the results at the bottom of the page. You can enter values or any combination of values to limit the search.

Function Enter the administrative area on which to search.

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Variable Data	Click to access the Variable Data page, where you can add values to search on for specific variable data related to the administrative function that you selected. If no variable data is required or allowed for the administrative function selected, the Variable Data link is unavailable.
Category	Enter the category from the Communication Categories page, for which to search.
Method	Enter the method from the Communication Contexts page, for which to search.
Direction	Enter the direction from the Communication Contexts page, for which to search.
Letter Code	Enter the letter code from the Standard Letters Table page, for which to search.
Status	Enter the status of the communications for which to search. Available values are: *All:* The system searches for all communications regardless of status. *Complete:* The system searches only for completed communications. *Incomplete:* The system searches only for incomplete communications.
Search	Click to launch the search based on the criteria you selected.

General Info Tab

For the Organization Summary page, the Process Used field indicates if the recipient's information is in the Recipients - Letter Gen Process or the Recipients - Comm Gen Process tab.

Click the trash can icon to delete any communication from the recipient's record. The icon appears under these conditions:

- The system is configured, on the Installation Default - CC page, to allow individual communication deletion.
- 3C Group Security allows the user to access the particular records.

See [PeopleSoft Campus Community 9.0 Fundamentals PeopleBook]Deleting Individual Communications.

Letter Details Tab

Use the Letter Details tab to determine if supplemental information is provided about the communication, such as enclosure letter codes and descriptions if enclosures were included, the related ID if the communication was joint, and the category and context for the communication.

Note. A joint communication can be assigned to only one of the two individual IDs. However, when a joint communication is assigned, the communication is listed in the summary for both IDs. For example, if you assign a joint communication to primary ID 12345 with the related ID 13578 and you view the summary for ID 12345, the joint communication check box is selected and no related ID value appears. When you view the summary for (related) ID 13578, however, the joint communication check box is selected and the related ID of 12345 appears.

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Reviewing 3C Group Access to a Communication

Access the Operator 3C Groups Summary page (Campus Community, Communications, Person Communications, Communication Summary, Operator 3C Groups Summary or Campus Community, Communications, Person Communications, Communication Summary, Operator 3C Groups Summary).

Communication Summary | Operator 3C Groups Summary

User ID: PS Name: Smith Jr.,John W.

Operator Group Summary

Institution	Description	Inquiry Indicator	Update Indicator	Delete Indicator
Great Lakes University	Business Services Staff	☑	☑	☐
Great Lakes University	UGRD Admissions Counselors	☑	☑	☐
PeopleSoft Australia Uni	Admissions	☑	☑	☐
PeopleSoft Australia Uni	Automated Results Transfer Sys	☑	☑	☐
PeopleSoft Australia Uni	Student Finance	☑	☑	☐
PeopleSoft Australia Uni	Student Records	☑	☑	☐
PS Community College System	Admissions Operations Staff	☑	☑	☐
PeopleSoft University UK	Admissions Postgraduate	☑	☑	☐
PeopleSoft University UK	Admissions Undergraduate	☑	☑	☐
PeopleSoft University UK	Admissions - GTTR	☑	☑	☐
PeopleSoft University UK	Admissions - UCAS	☑	☑	☐
PeopleSoft University - NLD		☑	☑	☐
PeopleSoft University	Alumni Director	☑	☑	☐
PeopleSoft University	Alumni Event	☑	☑	☐
PeopleSoft University	Alumni Membership	☑	☑	☐
PeopleSoft University	Alumni Staff	☑	☑	☐
PeopleSoft University	Alumni Student Staff	☑	☑	☐
PeopleSoft University	Alumni Volunteers	☑	☑	☐
PeopleSoft University	Business Admissions Counselors	☑	☑	☐
PeopleSoft University	Business Admissions Operations	☑	☑	☐

Operator 3C Groups Summary page

You can review the inquiry and update access of the 3C groups that have access to the communication, and you can change the inquiry access for a group on this page. You cannot change the update access.

Reviewing Details of a Communication

The Communication Detail and Org Communication Detail pages are view-only versions of the Person Communication Management and Organization Communication pages where you assign the communications. You can view the details of an assigned communication on these pages, but you cannot enter or edit the data.

See Also

lscc, Managing Communications, Assigning Communications

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Using the Envelope and Label Generation Process

This section provides an overview of the Envelope and Label Generation (SCC_CGLABELS) process, and discusses how to:

- Enter selection parameters.
- Enter process parameters.

Understanding the Envelope and Label Generation Process

Use the Envelope and Label Generation process (SCC_CGLABELS) to generate envelopes and labels for a communication previously generated by the Communication Generation process (SCC_COMMGEN) (or for envelopes and labels previously generated by the Envelope and Label Generation process if you are rerunning them) or for a hardcopy communication that does not have a template in your PeopleSoft system, such as a brochure, flyer, post card, and so on.

For communications previously generated by the Communication Generation process, you can use the process to rerun the envelopes without having to reset and regenerate the full communication. Use the Communication Generation process instance number to ensure consistency in the name, address, and salutation data between the letter and the envelope or label.

For hardcopy communications, use the process to generate envelopes or labels for a specific set of IDs without extracting more data than required for an envelope or label (usually name and address data).

Note. You can use the Letter Generation process to generate labels and envelopes for hardcopy communications, but the process extracts all of the data that it would extract for a letter.

Warning! IDs that have a communication set to *Completed* either manually or by the Letter Generation process are not recognized by the Envelope and Label Generation process. The process recognizes and processes only communications completed by the Communication Generation process or the Envelope and Label Generation process.

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Pages Used for the Envelope and Label Generation Process

Page Name	Definition Name	Navigation	Usage
Selection Parameters	SCC_CG_RUN_ENVLBL1	• Campus Community, Communications, Set Up Communications, Envelope and Label Generation, Selection Parameters • Contributor Relations, Session Management, Acknowledgements, Generate Acknowledgements, Selection Parameters • Contributor Relations, Communications, Process Communications, Selection Parameters	Specify general parameters for extracting name and address data for envelopes and labels.
Process Parameters	SCC_CG_RUNCTL2	• Campus Community, Communications, Set Up Communications, Envelope and Label Generation, Process Parameters • Contributor Relations, Session Management, Acknowledgements, Generate Acknowledgements, Process Parameters • Contributor Relations, Communications, Process Communications, Process Parameters	Specify usages and dates for the Envelope and Label Generation process to use, identify how the process is to handle missing critical data, and specify where the process is to place and sort the outputs.

Entering Selection Parameters

Access the Selection Parameters page (Campus Community, Communications, Set Up Communications, Envelope and Label Generation, Process Parameters).

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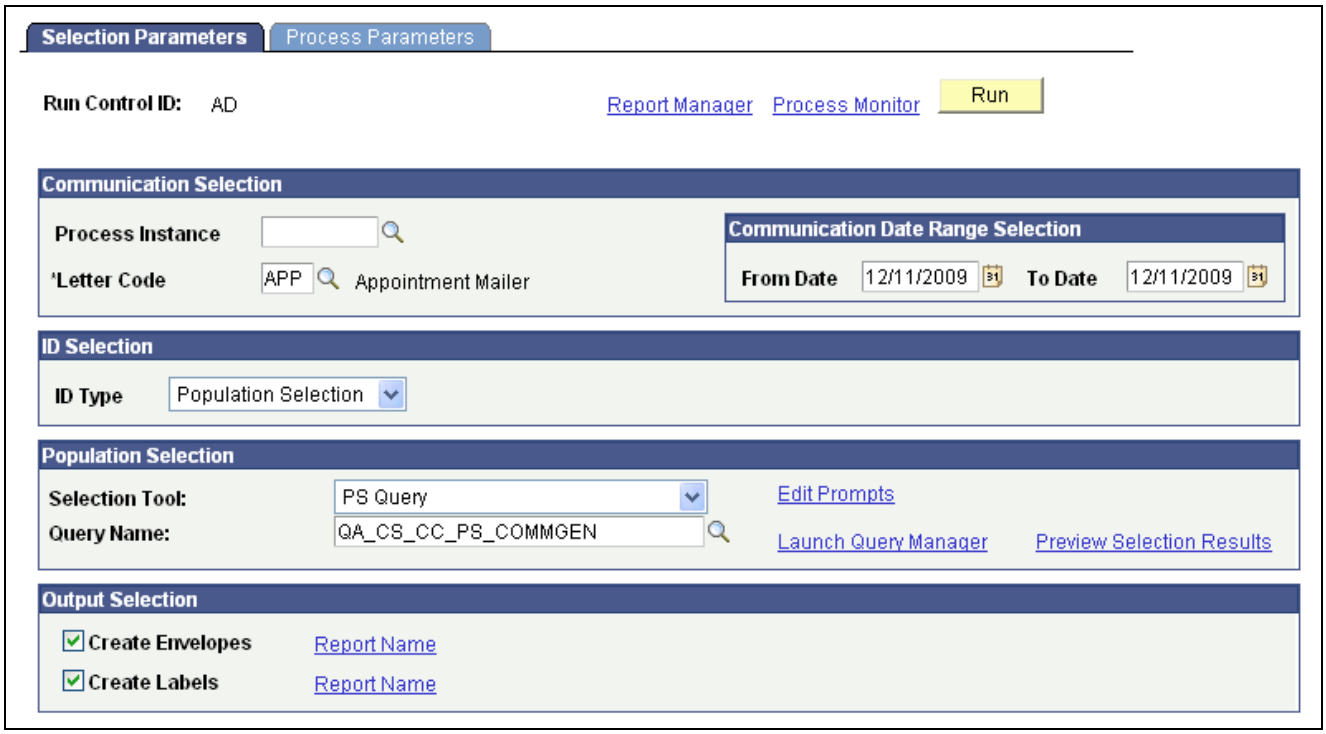

Selection Parameters page

Communication Selection

Process Instance

If the communication was previously generated, select the process instance for which you want to generate envelopes or labels.

Only the process instances created by either the Communication Generation or the Envelope and Label Generation process are available to ensure that the data extracted by those processes is the same data that will be used to generate the envelopes and labels.

Note. The process instance number appears in the Process Instance field on the processed ID's Person Communication Management or Organization Communication Management page.

Letter Code

Enter the letter code of the item for which you want to generate envelopes and labels.

If you entered a process instance number, the letter code of the generated communication appears in the Letter Code field, and the field is unavailable.

If the communication has not been completed, enter the letter code for which you want to generate the envelopes and labels. For example, it could be a letter code for a hardcopy item (brochure, flyer, post card, or other) for which you want to generate envelopes and labels.

Note. All letter codes are available, whether or not they are set up for the Communication Generation process.

Communication Date Range Selection

This group box appears only when the letter code is entered manually.

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From Date and **To Date**

Enter the date range of the communication records from which to extract data.

For example, you might want to extract data only from IDs to which you assigned a specific letter code and set the communication date to between January 1 and March 1 of the current year.

ID Selection

ID Type, Person ID, and **Org ID**

Specify the types of IDs for which you want to generate envelopes and labels. The choices are: *All IDs, All Org IDs, All Person IDs, One Org ID, One Person ID,* or *Population Selection.*

When a process instance number is entered, only the IDs processed within the process instance are available.

When a letter code is manually entered, the only IDs available for processing are the person IDs and organization IDs with that letter code assigned within the specified date range and where the communication is not completed.

If you enter *One Person ID* or *One Org ID,* the Person ID or the Org ID field appears. Enter the specific ID for which to generate the envelope or label.

Population Selection

This group box appears only when the ID type is *Population Selection.*

Selection Tool

Select the tool to use to identify the population for the process.

Only tools set to *Active* on the Selection Tool setup page and the applicable selection tools defined in the context definition for the process are available.

The PeopleSoft system delivers the following tools with a default status of *Active: Equation Engine, External File,* and *PS Query.*

Query Name, Equation Name, or **Attached File**

The field appears based on the selection tool specified.

Enter the name of the query or equation to use or upload the external file to use to select the desired population.

See lscc, Using the Population Selection Process.

Output Selection

Create Envelopes, Create Labels, and **Report Name**

Select the appropriate check box to generate envelopes or labels or both.

When selected, the Report Name link appears. You must select the report definition to use. The report definition must contain the envelope or label template to use and enables the process to retrieve name address information from the associated data source to merge into the template.

Only the report names to which you have security access are available.

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Note. When generating envelopes and labels from within the Communication Generation process, only the report definitions that are created with a data source configured with the same administrative function used in the main letter code are available. However, when generating envelopes and labels with the Envelope and Label Generation process, the data source associated with the report definitions does not need to match the administrative function of the letter code.

For example, with the Envelope and Label Generation process you can generate envelopes and labels for a letter code with the ADMA administrative function, and use a report definition with the GEN administrative function. This enables you to use a generic report definition to create envelopes and labels.

Warning! When a Process Instance number is entered the Envelope and Label Generation process does not re-extract data for envelopes and labels. It reuses the data extracted for the main letter code report definition to merge inside the envelope or label template. This ensures consistency between the address, the salutation information printed on the letter, and the name and address on the envelopes and labels. If you need to extract additional data to include on the envelopes or labels (for example, you might want to print the name of the admissions recruiting center for the ID on the envelope or label), then you must include the data inside the data source of the report definition for the main letter code. If the data is not in the data source for that report definition, it will not be extracted.

This table lists the predefined report definitions provided for generating envelopes and labels. You can use these as is or use them as samples from which to create your own templates:

Admin Function	Report Name	Report Description
GEN	QA_CSENVGEN	CommGen Envelope - GEN
GEN	QA_CSLBLGEN	CommGen Label - GEN
AVIN	QA_CSENVAVIN	CommGen Envelope - AVIN
AVIN	QA_CSLBLAVIN	CommGen Label - AVIN
ADMA	QA_CSENVADMA	CommGen Envelope - ADMA
ADMA	QA_CSLBLADMA	CommGen Label - ADMA

Entering Process Parameters

Access the Process Parameters page (Campus Community, Communications, Set Up Communications, Envelope and Label Generation, Process Parameters).

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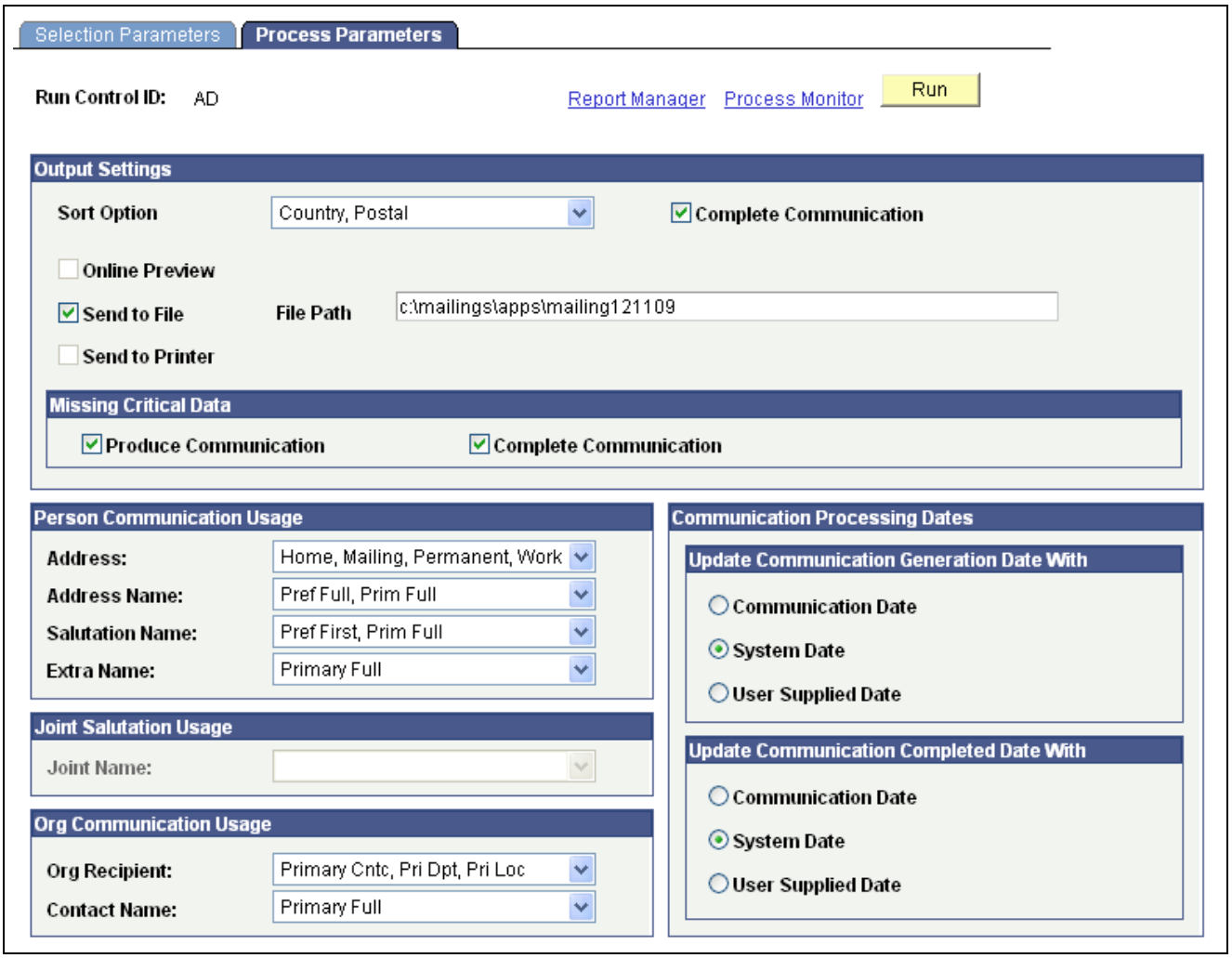

Process Parameters page

Output Settings

Sort Option

Enter how to sort the generated outputs. Available options are:

All Alphabetically by ID Type to sort organization envelopes and labels first, alphabetically by the organization description and then by the first letter of each recipient's name, contact, department, or location name depending on how the output is addressed, and then sort individual envelopes and labels alphabetically by each recipient's last name/first name.

Country, Postal to sort by each recipient's postal or zip code. Use this sort option to streamline mass mailings sent through the postal service. This is the default value.

Country, Postal by ID Type to sort organization envelopes and labels first, by each recipient's country and postal address, and then sort individual envelopes and labels by each recipient's country and postal address.

If a process instance number is entered, this field is unavailable. The process uses the sort option from the generated communication.

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Complete Communication

Select to have the Envelope and Label Generation process mark the communication *Completed* for each processed ID.

When selected, the Envelope and Label Generation process updates the ID's communication record (Person Communication or Organization Communication page) by marking the communication Completed and displaying the View Generated Communication link. Use the link to retrieve and view the envelope output (the label output is the same as the envelope output).

Selecting this check box is especially useful for hardcopy letter codes that you want to consider completed after the envelopes or the labels are generated.

If a process instance is entered, the check box is cleared and unavailable for change.

Note. If you need to reset communications that have been marked *Completed* by the Communication Generation process or the Envelope and Label Generation process, use the Reset Communication process.

See lscc, Managing Communications, Resetting Generated Communications.

Online Preview

Select to preview the data, in envelope and label format based on the template in the specified report, online in PeopleSoft Report Manager.

When selected, the system sends a sample of all related outputs to PeopleSoft Report Manager with corresponding links for you to click to preview each output.

For example if you used the QA_CSXTRENV_GEN report to generate the envelopes, the system displays a QA_CSXTRENV GEN Extract Envelopes link in Report Manager. Click the link to open the .pdf file that contains the data in envelope format, for all of the processed IDs.

If you used the QA_CSXTRLBL_GEN report to generate the labels, the system displays a QA_CSXTRLBL GEN Extract Label Definition link in Report Manager. Click the link to open the .pdf file that contains the data in label format, for all of the processed IDs.

Note. Previews do not cause communications to be marked Complete and no information is entered in the Person or Organization Communication Management components for the communication.

When generating envelopes and labels for multiple IDs, the online preview functionality extracts data for previews of only the first 10 IDs and their enclosures and recipients.

Send to File and **File Path**

Select to send the data, in envelope and label format based on the template in the specified report, to the destination file that you specify.

Use the file to review the data before printing or use the file to send to a third-party such as a mailing service.

Note. When *Send to File* is selected, the file format is always .pdf regardless of the format type defined in the Report Definition used for generating the labels or envelopes.

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Send to Printer, Envelope Printer, and **Label Printer** Select to send the data, in envelope and label format, directly to the printer that you specify.

Missing Critical Data, Person Communication Usage, Joint Salutation Usage, Org Communication Usage and Communication Processing Dates

If a process instance number is entered, fields in these group boxes are unavailable. The process uses the settings from the generated communication. Otherwise fields in these group boxes are the same as described for the Process Parameters page in the Communication Generation component.

Note. While the Salutation Name field is most useful for generating a letter or email communication, you can also use the field to extract the name of an ID to create nametag labels. Your template might say: *Hello my name is <salutation name>* and your label printer might be set to print pages of name tags. As with addresses, you can list salutation name types in a preferred search-and-use order.

See lscc, Managing Communications, Using the Communication Generation Process.

Deleting Communications

This section provides an overview of communication deletion and discusses how to:

- Delete individual communications.
- Delete communications in batch.

Understanding Communication Deletion

The Delete Communications batch component enables you to define high-level parameters for removing communications from the system. For example, the institution might want to purge old communication records that are no longer required, or might need to correct a communications assignment made in error. You can delete entire categories, or further define the parameters by letter code or specific date ranges. Population Selection functionality enables you to target specific subsets of IDs within your deletion parameters. Security is enforced at the category level based on the user's 3C Group security. To delete communications individually, use the Communication Summary component for people or the Org Communication Summary component for organizations.

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Pages Used to Delete Communications

Page Name	Definition Name	Navigation	Usage
Communication Summary	COMM_SUMMARY	• Campus Community, Communications, Person Communications, Communication Summary • Student Admissions, 3 C's and Event Summaries, Communication Summary • Student Recruiting, 3 C's and Events Summaries, Communication Summary • Contributor Relations, Communications, Communications - Person, Communication Summary • Contributor Relations, Constituent Information, People, Communications, Communication Summary • Self Service, Outreach, View person information, Constituent Information, Communication Summary • Records and Enrollment, 3 C's Summaries, Communication Summary • Student Recruiting, Student Recruiters, Summaries, Communication Summary	Search for and review a summary of communications to or from an individual.
Delete Communications	SCC_DEL_COMMUNICTN	Campus Community, Communications, Delete Communications	Define processing parameters to run the Delete Communications process.

Deleting Individual Communications

Access the Communication Summary page.

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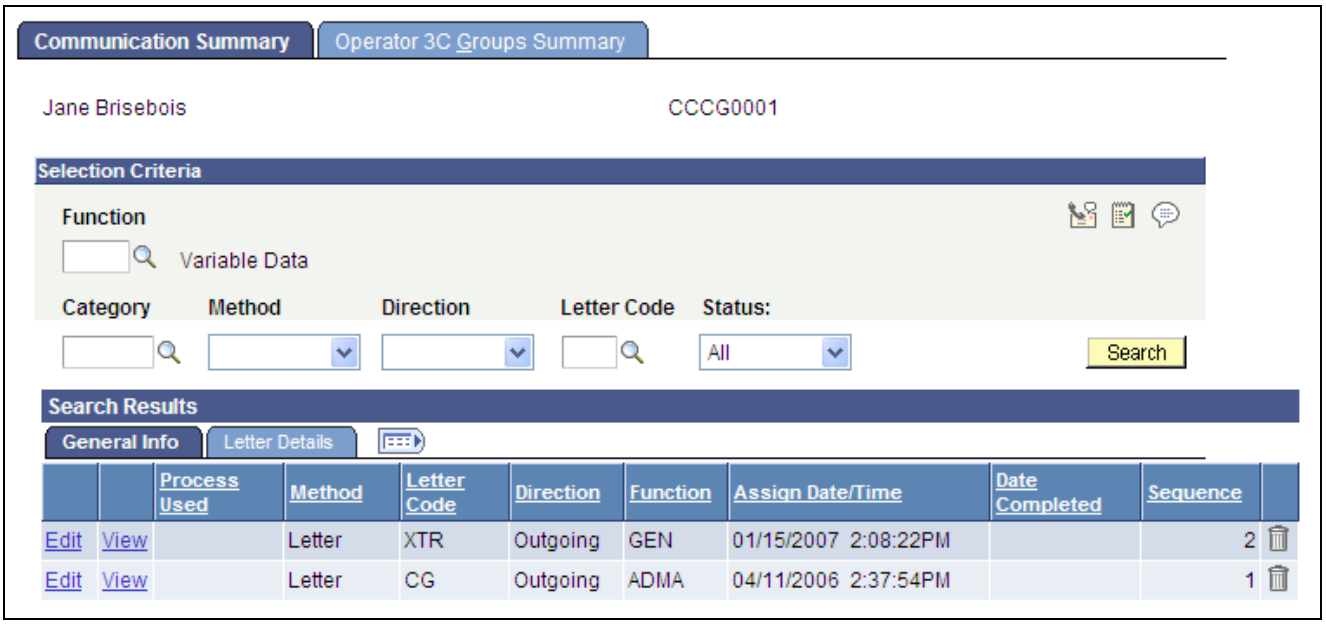

Communication Summary page

The system displays all communications accessible through individual 3C Group setup. To delete a communication, click the trash can button beside the row. Warning and confirmation messages appear. The system deletes the record when you save the page.

When you delete a communication, any enclosures associated with the communication are also removed. These enclosures share the same sequence number; since they considered subordinate, they do not have a trash can icon beside them and cannot be separately deleted here.

Note. Deleting a communication from a person does not remove it from any related recipients; to delete a communication from a related recipient, search for their record and remove it manually. Also, when you delete a communication, all related comments and checklist items remain.

See Also

[PeopleSoft Campus Community 9.0 Fundamentals PeopleBook]Reviewing Communications

Deleting Communications in Batch

Access the Delete Communications page.

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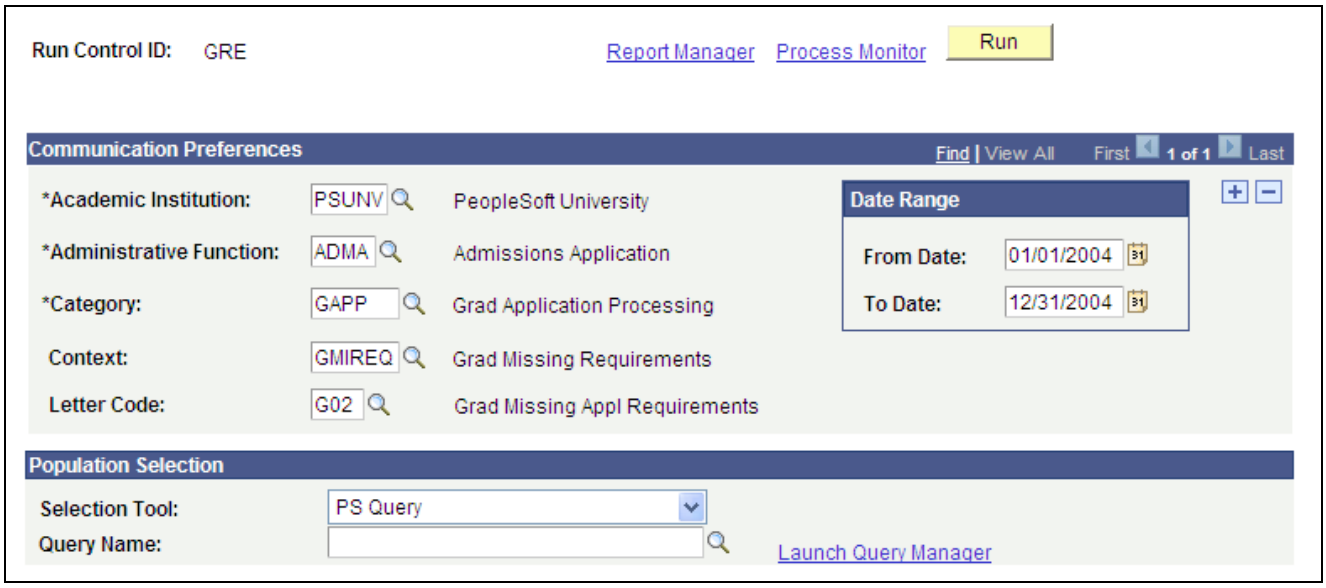

Delete Communications page

Select one or more parameters to narrow the set of communication records to be deleted. The Academic Institution, Administrative Function, and Category fields are required; all other parameter selections are optional. To define a subset of specific IDs for which you want to delete communications, use the Population Selection group box.

This page allows for up to three rows of communication preferences. This limit has been applied to constrain the complexity of, and processing time needed for, the resulting SQL statement executed by the deletion process. Only the communication preferences are subject to this requirement. Note that the Population Selection parameter of the run control is only set once and is applied to all communication preference rows.

Administrative Function Select an administrative function. The values available here are defined on the Administrative Function Table.

Category Select a category of communications. The values available here are defined by 3C group security.

Context Select a communications context. The values here are those valid under the Category selected.

Letter Code Select a specific communication letter code. The values here are those valid under the Category and Context selected.

From Date and **To Date** These fields are optional; however if used, both date fields must be completed and the From Date value must precede the To Date value.

Use the Population Selection group box to define a set of IDs, select a PS Query or define an external file. Queries available for selection have the 3C Delete Bind Record "SCC_3CDEL_BND" included in the query. IDs returned by the Population Selection process apply to all Communication Preference rows in the component.

After you specify the parameters, you can run the SCC_3CDELETE Application Engine process by clicking the Run button. When you click the Run button, the system searches for all communications matching the parameters specified on this page and deletes them. Only the target communications are deleted and any related checklists and comments remain, while maintaining the relationships between the relevant 3C tables.

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Note. A user's 3C group must have the Inquiry Indicator selected to be able to see anything associated with it and so delete it.

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