Setting Up Communications

Understanding Communications Setup

Important! Letter Generation (Letter Gen) is a deprecated product. Support will be maintained for this product, but no new development will be produced for Letter Gen. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see Understanding the Communication Generation Process

To set up communications, use the following components: Standard Letter Table (SA_STNDR_LTR_TABLE), Communication Context Table (COMM_CTXT_TBL), Communication Category Table (COMM_CATG_TBL), Communication 3C Groups (COMM_GRP_3C_TBL), and Communication Speed Key Table (COMM_SPEED_KY_INST).

Use the Communication Contexts (SCC_COMM_CTXT_TBL) and Communication Categories (SCC_COMM_CATG_TBL) component interfaces to load the data into the tables for these components.

Use the Communication Data Source (SCC_CG_DTASRC) and Report Definition (PSXPRPTDEFN) components to set up the Communication Generation process.

Before you can assign communications to individuals, organizations, or groups of individuals, you must identify the letter codes and methods to use and set up the contexts and categories. You will also want to create 3C groups to control security access to communications, and define Communication Keys (Comm Keys) to streamline communication data entry.

A letter code must exist for each template that you plan to use. A letter code links extracted data to a template created to be used with the Letter Generation (Letter Gen) process or with the Communication Generation (Comm Gen) process. You can also use letter codes to group letters to send as enclosures. The PeopleSoft system delivers sample letter templates in Microsoft Word. You can use the sample templates as they are, modify them, or create your own.

Warning! Some processes are dependent on the predefined letter codes and their templates. Read the documentation carefully and check with your administrator before modifying a predefined letter code or template.

You must create communication contexts and group them into communication categories to set up communication management. Communication contexts are broad groupings that indicate the type of communication and how it was sent or received. Methods include letter, phone call, fax, email, and in person. You can specify more than one method of communication for each context. For example, if students can contact your institution by letter, email, or phone to confirm admission acceptance, you might create an Admissions Acceptance communication context that includes all three methods.

A communication category is a broad grouping of communication contexts that generally indicates why a communication was sent or received. For example, you might create an Admissions communication category that includes the following communication contexts: application received, admission acceptance, admission decline, admission deferral, frosh admit, frosh deny, and so on, or you might decide to create

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more detailed communication categories such as Frosh Recruit, Frosh Admission, Graduate Recruit, and Graduate Admission.

Use communications 3C groups to grant groups of users inquiry or update security access to the categories of communications in your database.

Use Comm Keys (communication speed keys) to create a shorthand method of specifying common communication data. With the controls in place—standard letter codes, communication methods, communication directions, communication contexts, and communication categories—you can set up Comm Keys to combine these controls with a number of defaults into one shortcut page control.

Note: Comm Keys are required if you plan to use the 3C engine process to assign communications to individuals or organizations.

The following table lists the features of Letter Generation and Communication Generation processes. Letter Generation is deprecated. You are encouraged to use the richer functionality included with Communication Generation.

Bundle 47. Documentation-only update. The feature table has been updated to clarify the features or capabilities that apply to Letter Generation and Communication Generation.

Feature or Capability	***Letter Generation***	***Communication Generation***
Process Type	SQR	Application Engine
Person ID, Org ID, Both	Y	Y
Communications Recipients	Y	Y
Joint Communications	Y	Y
Enclosures	Y	Y
Include Checklist Items	Y	Y
Update Checklist	Y	Y
Print Comment	Y	Y
Communication Methods	Letter-only	Letter, Email
Preferred Communication Method	N	Y
Communication Language	Base language	Multiple languages or specified language
Preferred Communication Language	N	Y
Extract Data	Generic list (delivered)	User-determined from data source and query
Missing Critical Data	Predefined	Configurable
View of Data Extracted	Communication Letter Data component	View Generated Communication link

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Feature or Capability	*Letter Generation*	*Communication Generation*
Communication Management Component	Y	Y
Supported Output Formats	RTF, TXT	RTF, PDF (send-to-printer only) HTML (email format)
Template Creation	Microsoft Word	BI Publisher Template Builder
Organization Communications	Y	Y
Org Recipient Usage Table	N	Y
Include Checklists	One	Multiple
Checklist Code	One	Multiple
Checklist Type	One	Multiple
Tracking Group	One	Multiple
Item Status	Hard Coded	Selectable
Preview Option	N	Y
Send to Printer	Y	Y
Sort Outputs	Y	Y
Generate Labels and Envelopes	Y (using Microsoft Word)	Y
Oracle BI Publisher	N	Y

Related Links

Understanding the 3C Engine
Using the Letter Generation Process
Understanding the Communication Generation Process Setup
"Setting Up 3C Group Security" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

Prerequisites for Setting Up Communications

Before designing your communication structure, do the following to analyze your functional areas and institutional needs for tracking and scheduling communications for individuals and for external organizations:

- Understand the use of administrative functions and 3C groups and make sure they are set up properly.
- Identify all incoming, outgoing, and in-person contacts to track.

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- Identify the various types of contact (for example, phone, letter, email, and fax) that your institution wants to track.
- Set up usages for names, addresses, and salutations.

Related Links

Reviewing Administrative Functions
Understanding Communication Management
Designing Campus Community

Defining Letter Codes

Important! Letter Generation (Letter Gen) and Financial Aid Notification (FAN) letter are deprecated products. Support will be maintained for the products, but no new development will be produced for either Letter Gen or FAN. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see Understanding the Communication Generation Process

To define letter codes, use the Standard Letter Table CS (SA_STNDR_LTR_TABLE) component.

This section discusses how to define letter codes.

Page Used to Define Letter Codes

Page Name	*Definition Name*	*Navigation*	*Usage*
Standard Letters	SCC_STN_LTR_TBL	• Set Up SACR, Common Definitions, Communications, Standard Letter Table CS • Campus Community, Communications, Set up Communications, Standard Letter Table CS • Contributor Relations, Communications, Set Up Communications, Standard Letter Table	Review or define the types of letters that your institution wants to generate by assigning a letter code and administrative function to each. You can also group letters to create enclosures.

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Setting Up a Letter Code

Access the Standard Letters page (Set Up SACR, Common Definitions, Communications, Standard Letter Table CS).

Image: Standard Letters page (1 of 2)

This example illustrates the fields and controls on the Standard Letters page (1 of 2). You can find definitions for the fields and controls later on this page.

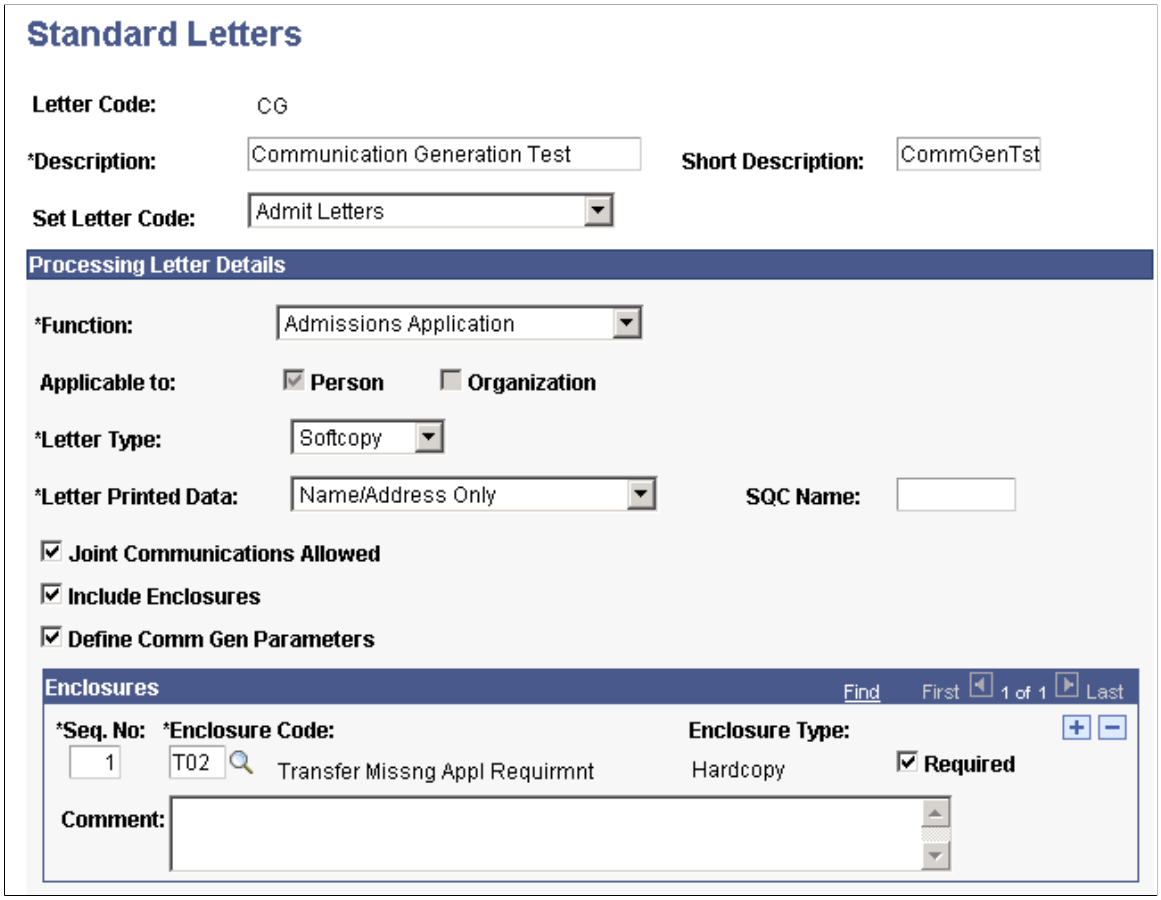

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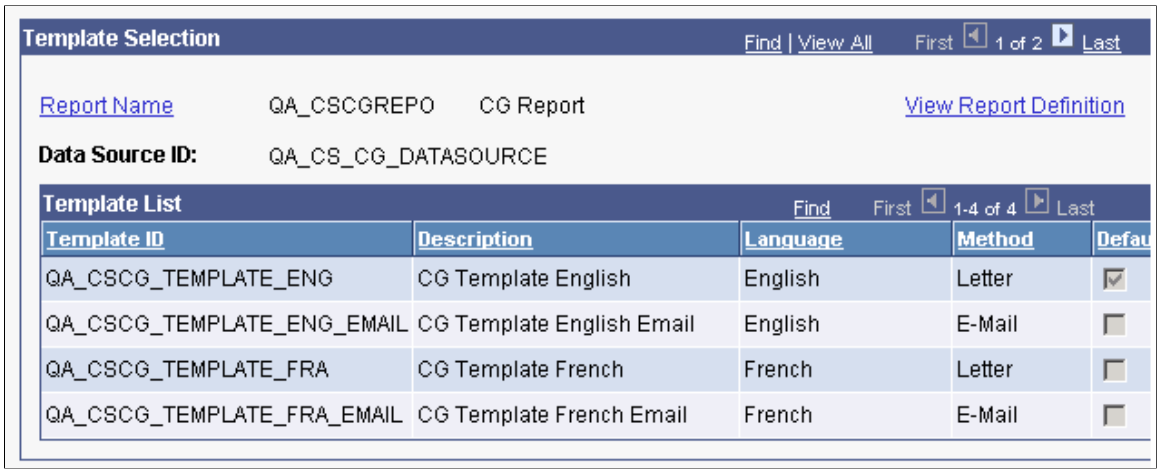
Image: Standard Letters page (2 of 2)

This example illustrates the fields and controls on the Standard Letters page (2 of 2). You can find definitions for the fields and controls later on this page.



Warning! Be sure to use the Standard Letters page (SCC_STN_LTR_TBL) in the Standard Letter Table CS component (SA_STNDR_LTR_TABLE) for Campus Solutions letter codes and read the specific product documentation before modifying any letter code delivered within Campus Solutions.
If you implement PeopleSoft HCM, you must use the HCM Standard Letter Table page (STANDARD_LTR_TBL) to set up letter codes for HCM form letters.
Within Campus Solutions, you must be familiar with the scope of the PeopleSoft Financial Aid *FAN* code or template before modifying it. See:

"Creating the FAN Extract File and Producing the FAN Letter" (PeopleSoft Campus Solutions 9.2: Financial Aid)

Set Letter Code

Select the category (such as Admit Letters, Inquiry Response Letters, Recruitment Letters, and so on) that best describes the group of letters that includes this letter code. This field is optional and for information only.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Processing Letter Details

Function

Select the function, from the Administrative Function Table page, that identifies the variable data to extract for communications associated with this letter code.

For example, if you are sending a letter to a freshman applicant under the function of *Student Term,* the variable data of Academic Career and Term are extracted for the communication. The variable data are set up in the Administrative Function table and cannot be modified.

See Reviewing Administrative Functions.

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Applicable To

When you select the function, the system indicates the types of IDs that can receive communications associated with that function by selecting the Person check box, the Organization check box, or both check boxes.

If the function permits communications with both persons and organizations, both check boxes are available for editing. You can select or clear the check boxes to limit the communications to either persons only or organizations only.

Letter Type

Select the check box for the desired output form for this letter. Values are:

Hardcopy: Does not allow the system to extract data or merge into a softcopy template. Indicates preprinted items, such as brochures or pamphlets.

Softcopy: Allows the system to extract data and merge into a softcopy template, which you can then print.

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

Letter Printed Data

Enter the type of extracted data for the process to save for historical purposes.

The Letter Generation process saves the data that you specify and displays it on the Communication Letter Data page. You can select *All* to save all of the communication headers and their data, *Name/Address Data* to save only the name and address headers and their data, or *None* to save no data.

Warning! The Letter Generation process extracts a huge amount of data. Saving all of the communication headers and their data can cause the table to be huge and the Communication Letter Data page to take significant time to load.

The Communication Generation process either saves the generated output with all data or does not save the generated output. Select either *All* or *Name/Address Data* to store the sample output and make it available from the View Generated Communication link on the Person Communication Management or the Organization Communication Management components. Select *None* not to store a sample output or any data, in which case, the View Generated Communication link does not appear.

See Understanding Communication Management.

The values for this field are delivered with your system as translate values. Do not modify these values in any way.

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Any modifications to these values could require substantial programming effort.

SQC Name (structured query compiler name)

Enter the name of the unique Structured Query Compiler (SQC), if any, required to generate additional variable data for communications associated with this letter code.

The Letter Generation process uses the unique SQC to extract data into a letter template. You must modify the letter generation SQR (CCLTRGEN.sqr) to look for any SQCs that you specify here.

Warning! Do *not* modify the CCLTRWOL.SQC. The User Profiles Management process requires this SQC. Any modifications to this could require substantial programming effort.

The Communication Generation process does not use SQCs. It uses Application Classes or PS Query to extract specific fields.

See Using the Communication Generation Process.

Joint Communications Allowed

Select to permit this letter to be addressed jointly to two people at the same address, provided that they have a relationship defined in your database that permits joint communications.

The sample Microsoft Word template CCLTRJNT.doc is provided for use with joint communications generated by the Letter Generation process. For the Communication Generation process, examples are provided in the QA_CS_CC_LETTERCD _<letter code><language><method>.rtf template definitions.

Include Enclosures

Select to indicate that other letters must be grouped and sent with this letter. When selected, the Enclosures group box appears.

Define Comm Gen Parameters (define communication generation parameters)

Select to allow the Communication Generation process to generate communications with this letter code.

Enable the Communication Generation process for letter codes that might be used as enclosures, too. If you do not enable the process for a letter code that is an enclosure, the process cannot produce it and will return an error.

When selected, the Template Selection group box appears.

Enclosures

This group box is available only when the Include Enclosures check box is selected. You can group a maximum of 10 letter codes as enclosures here. Letter codes from which to select must already exist on the Standard Letters page.

Seq Number (sequence number)

Displays the number of this enclosure in the list of enclosures for this letter. The system automatically enters the next

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sequential number for each enclosure that you add. You can override the numbers manually to reorder the list of enclosures.

When you run the Letter Generation data extract process or the Communication Generation process, the process lists, in the order identified here, up to 10 enclosures on the main letter in the order identified here.

Enclosure Code

Enter the code for the letter to include as an enclosure.

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 prompt list displays the letter codes that exist and that are associated with the function ADMA on the Standard Letters page.

Enclosure Type

The system displays the type of output associated with the selected enclosure letter code, either *Softcopy* or *Hardcopy.*

Both the Letter Generation and Communication Generation processes will extract data for an enclosure set to *Softcopy.* Both processes will extract the enclosure code descriptions whether they are set to *Hardcopy* or *Softcopy* and you can list them all as attachments in the main letter template. A hardcopy enclosure is a printed brochure or other item produced outside of your PeopleSoft system that you must insert to include as an enclosure.

Required

Select this check box to indicate that the specific enclosure must accompany the main letter at all times. Administrative users can remove optional enclosures when they assign the communication to an individual on the Communication Management page or to an organization on the Org Communication Management page.

Comment

Enter comments to further identify or describe this enclosure. Enclosure comments are for information purposes only. They will not be printed in the communication.

Template Selection

This group box is available only when the Define Comm Gen Parameters check box is selected. The fields are related to the Communication Generation process only.

Report Name

The system displays the name of the report definition associated with the specified letter code and administrative function. To replace a report, click the Report Name link next to it and select the desired report on the Look Up Report Name page. To add a report, add a new row and click Report Name, and select the desired report.

The report names listed on the Standard Letters page when you save it are the report definitions that will be available on the

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Communication Generation process run control page for this letter code. Of those reports, only the reports to which the user has security access will be available to that user.

Making multiple reports available can be useful if multiple users send different templates or personalized templates for the letter code. For example, for a letter code dedicated to sending admissions letters, Mary can use her own templates, which might be set in a Report Definition named *MaryAD,* and John can use personalized templates that might be set in a Report Definition named *John_Personal.* Based on the security in the Report Definitions, only John has access to the templates under *John_Personal,* and only Mary has access to templates under *MaryAD.* When generating the communication, John will be able to use only the Report Definitions to which he has access, and Mary will be able to use only the Report Definitions to which she has access.

See Creating a Data Source File.

Data Source ID and **Template List**

Displays the data source ID that is associated with the report name that you enter and lists the Template IDs available for merging with that data source.

Description, Language, Method, and **Default**

The system displays information about the templates available for this communication.

Note: The system will not allow you to save the Standard Letters page if a selected report name includes more than one template with the same language and method combination. The Communication Generation process evaluates the language and method combination to determine which template to use when multiple templates exist in a report definition

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.

Defining Communication Contexts and Categories

Important! Letter Generation (Letter Gen) is a deprecated product. Support will be maintained for this product, but no new development will be produced for Letter Gen. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see Understanding the Communication Generation Process

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This section discusses how to:

- Define a communication context.
- Define a communication category.

Pages Used to Define Communication Contexts and Categories

Page Name	*Definition Name*	*Navigation*	*Usage*
Communication Context	COMM_CTXT_TABLE	• Set Up SACR, Common Definitions, Communications, Communication Context Table • Contributor Relations, Communications, Set Up Communications, Communication Context Table • Campus Community, Communications, Set Up Communications, Communication Context Table	Create and define communication contexts.
Communication Categories	COMM_CATG_TABLE	• Set Up SACR, Common Definitions, Communications, Communication Category Table • Contributor Relations, Communications, Set Up Communications, Communication Category Table • Campus Community, Communications, Set Up Communications, Communication Category Table	Define categories of communication contexts to indicate why a communication was sent or received.

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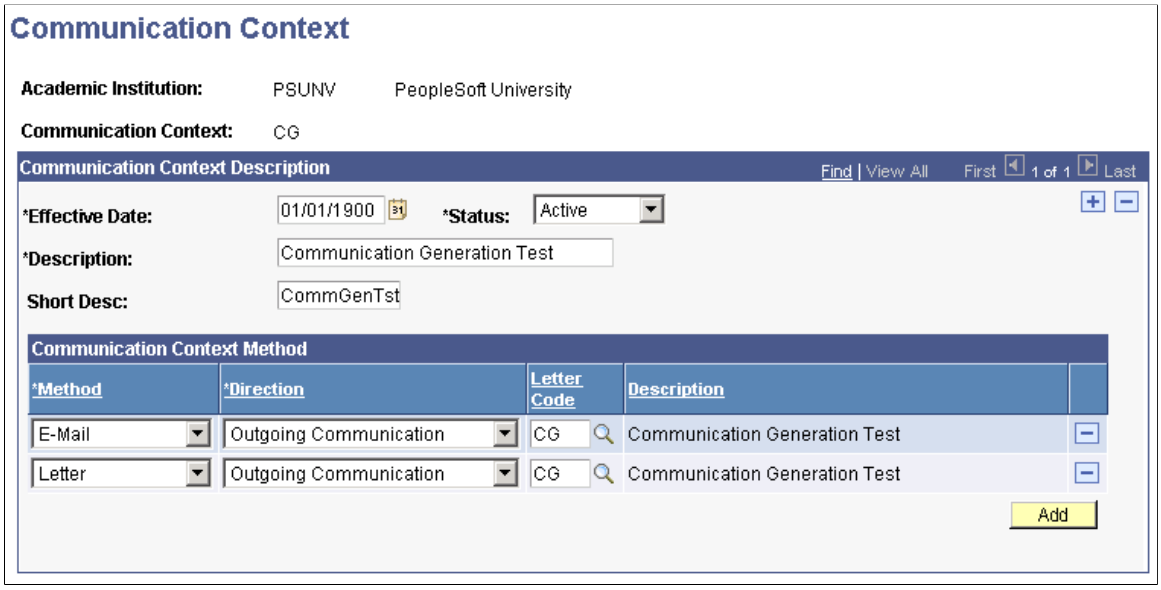
Defining a Communication Context

Access the Communication Context page (Set Up SACR, Common Definitions, Communications, Communication Category Table).

Image: Communication Context page

This example illustrates the fields and controls on the Communication Context page . You can find definitions for the fields and controls later on this page.



Communication Context Method

Method

Select the form of this communication (for example, letter, email, or phone call).

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

Values for this field are delivered with your system as translate values. The *Letter* value is required for generating letters with the Letter Generation process; do not modify it. You can, however, modify any of the other method translate values.

Direction

Specify the direction of this communication, such as in person, incoming communication, or outgoing communication.

Values for this field are delivered with your system as translate values. Except for the value of *Outgoing Communication,* you can modify these translate values.

Letter Code

Enter the code for this communication. The code specifies the variable data associated with this communication. The Letter Code field is available only when you specify *Outgoing Communication* in the Direction field.

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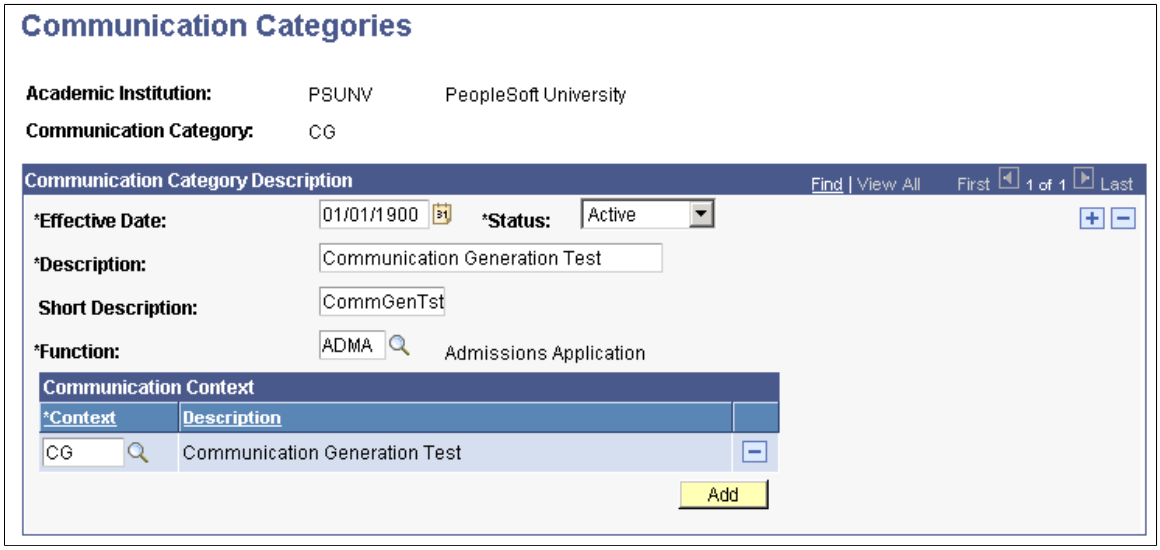
Available letter codes are from the Standard Letters page.

Defining a Communication Category

Access the Communication Categories page (Set Up SACR, Common Definitions, Communications, Communication Category Table).

Image: Communication Categories page

This example illustrates the fields and controls on the Communication Categories page. You can find definitions for the fields and controls later on this page.



Note: Communication categories are assigned to communication 3C groups on the Communications 3C Groups page for the purpose of limiting access to the communications associated with those categories. Therefore, make your communication categories specific so that you have more flexibility to determine which users have access to which communications.

Communication Category Description

Function

Enter the functional area to include in this category. The function determines the variable data that will be associated with communications in this category.

Available function codes are from the Administrative Functions page.

Communication Context

Context

Enter each context to include in this category.

Available context codes are from the Communication Contexts page.

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Description The system displays the long description of the context that you select. This value is from the Communication Contexts page.

Warning! All contexts from the Communication Context page are available, regardless of whether they include a letter code associated with the same function as the communication category. For example, if you select a context that has a letter code associated with the ADMA function and a category associated with the PROP function, the letter code will not be available as a valid choice when you assign the communication on the Communication Management page.

Defining 3C Groups

This section discusses how to:

- Define a 3C update/inquiry group.
- Define a communication 3C group.

Pages Used to Define 3C Groups

Page Name	*Definition Name*	*Navigation*	*Usage*
3C Update/Inquiry Group Table	GRP_3C_TABLE	Set Up SACR, Common Definitions, 3C Update/ Inquiry Group Table	Define a group of users who have similar needs and interests.
Communication 3C Groups	COMM_GRP_3C_TABLE	• Set Up SACR, Common Definitions, Communications, Communication 3C Groups • Contributor Relations, Communications, Set Up Communications, Communication 3C Groups • Campus Community, Communications, Set Up Communications, Communication 3C Groups	Associate one or more 3C update/inquiry groups with a communication category.

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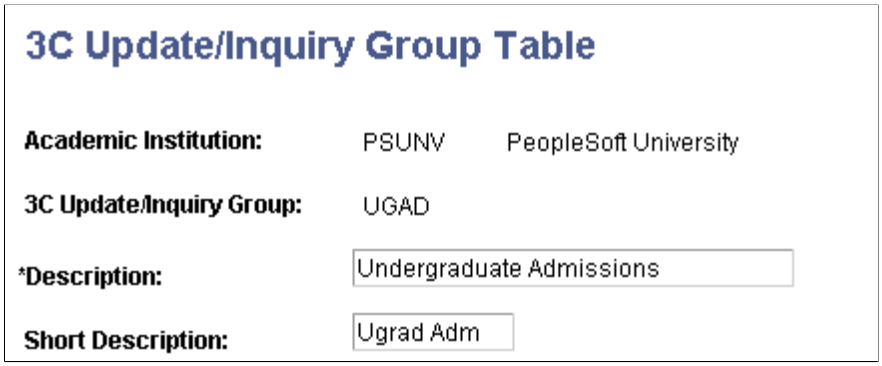
Defining a 3C Update/Inquiry Group

Access the 3C Update/Inquiry Group Table page ((Set Up SACR, Common Definitions, 3C Update/Inquiry Group Table).

Image: 3C Update/Inquiry Group Table page

This example illustrates the fields and controls on the 3C Update/Inquiry Group Table page. You can find definitions for the fields and controls later on this page.



Define a group of users who have similar needs and interests. You can then associate one or more 3C Update/Inquiry Groups with a communication category to create a Communication 3C Group.

Security Administrators give users security access based on 3C update/inquiry groups.

Related Links

"Setting Up 3C Group Security" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

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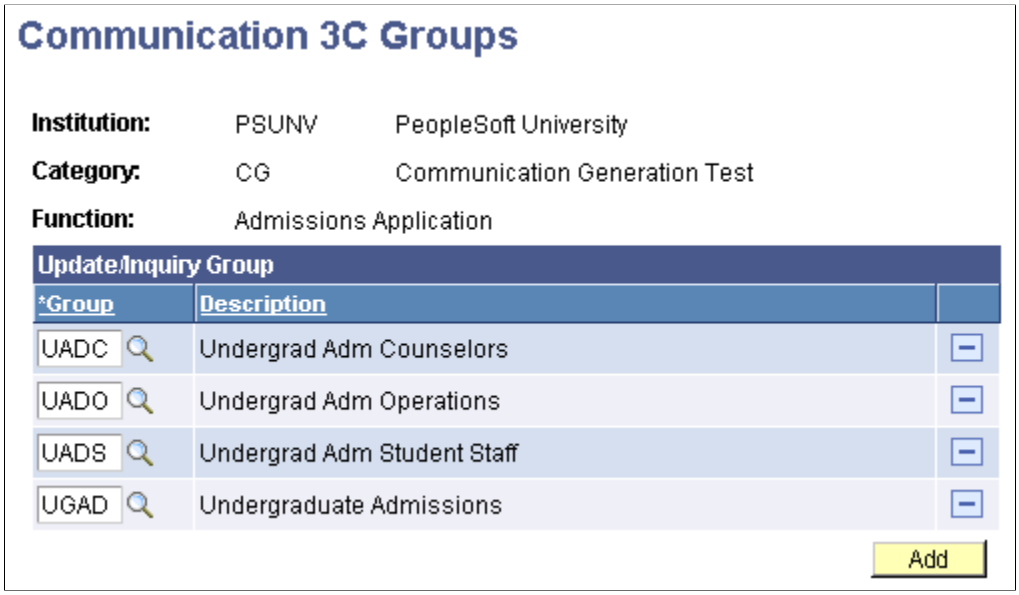
Defining a Communication 3C Group

Access the Communication 3C Groups page (Set Up SACR, Common Definitions, Communications, Communication 3C Groups).

Image: Communication 3C Groups page

This example illustrates the fields and controls on the Communication 3C Groups page. You can find definitions for the fields and controls later on this page.



Update/Inquiry Group

Group

Enter each group that should have access to this communication category.

Available group codes are from the 3C Groups page.

Description

The system displays the long description, from the 3C Groups page, of the group that you select.

Related Links

"Selecting the Type of 3C Group Access" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

Defining Communication Speed Keys

This section discusses how to define communication speed keys as shortcuts for defining communications.

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Page Used to Define Communication Speed Keys

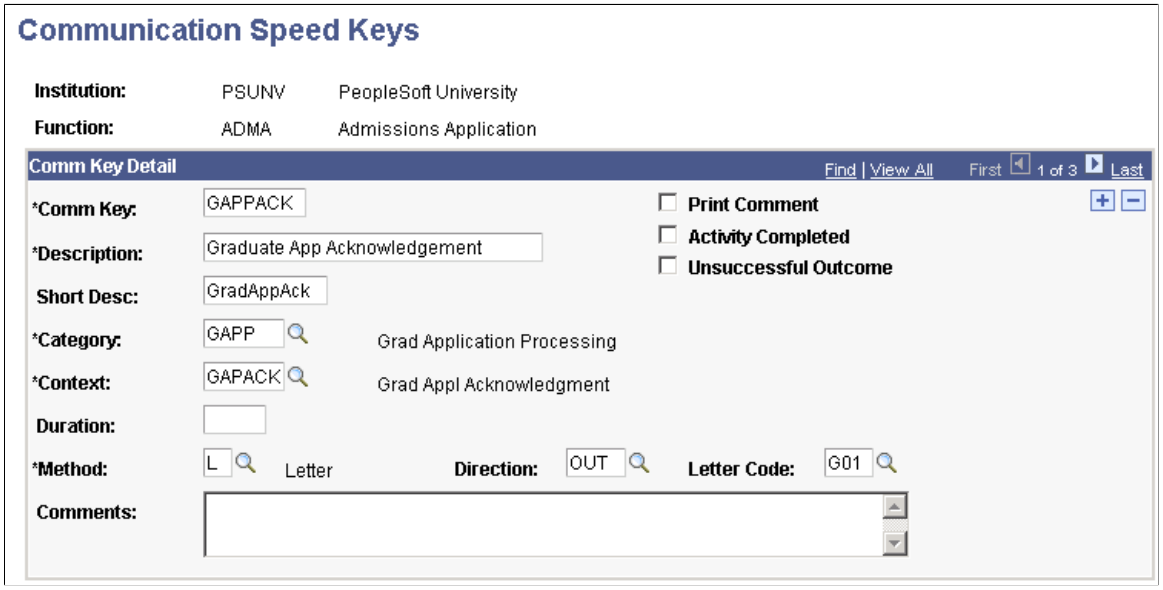
Page Name	*Definition Name*	*Navigation*	*Usage*
Communication Speed Keys	COMM_SPDKEY_TABLE	• Set Up SACR, Common Definitions, Communications, Communication Speed Key Table • Contributor Relations, Communications, Set Up Communications, Communication Comm Key Table • Campus Community, Communications, Set Up Communications, Communication Speed Key Table	Create Comm Keys for specifying common communication data.

Defining a Communication Speed Key

Access the Communication Speed Keys page (Set Up SACR, Common Definitions, Communications, Communication Speed Key Table).

Image: Communication Speed Keys page

This example illustrates the fields and controls on the Communication Speed Keys page. You can find definitions for the fields and controls later on this page.



Comm Key (communication key) Enter the name of the communication speed key to represent this set of communication elements.

Category Enter the communication category to associate with this communication speed key.

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Context

Enter the communication context to associate with this communication speed key.

Duration

Enter the average duration, expressed in minutes, for the type of communication that you are associating with this communication speed key. (Optional)

Duration is usually used to specify the length of time for in-person communications (for example, the duration of a phone call).

Method

Specify the typical method of the communication that you are associating with this communication speed key. The *Letter* method is required when generating letters.

Values for this field are delivered with your system as translate values. Except for the value of *Letter,* you can modify these translate values.

Direction

Specify the direction of the communication you are associating with this communication speed key. The *Outgoing Communication* direction is required when generating letters.

Values for this field are delivered with your system as translate values. Except for the value of *Outgoing Communication,* you can modify these translate values.

Letter Code

Enter the code, from the Standard Letters page, for the communication that you are associating with this communication speed key.

Comments

Enter comments to further describe or identify the communication to associate with this communication speed key.

Print Comment

Select this check box to include or print the comments on the Comments pages in the communication associated with this communication speed key.

Activity Completed

Select this check box to make the status of *Complete* available with this communication speed key.

This option is useful when data for a communication is typically entered after the activity is completed. For example, if the communication is an incoming phone call or an incoming letter, then the communication is already complete when you report it in the system.

Unsuccessful Outcome

Select this check box to make the status of *Unsuccessful* available with this communication speed key.

For example, if you were to hold a telephone fund-raising event, you might want to record each call to track your success rate. You could create two communication speed keys—one for successful phone calls and one for unsuccessful phone calls.

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Note: Before users can use the communication speed keys defined here, the communication speed key codes must be assigned in the users' defaults.

Related Links

"Setting Defaults for Communication Keys" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

Setting Up the Communication Generation Process

Important! Letter Generation (Letter Gen) is a deprecated product. Support will be maintained for this product, but no new development will be produced for Letter Gen. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see Understanding the Communication Generation Process

To set up the Communication Generation process, use these components: Communication Data Source (SCC_CG_DTASRC), Report Definition (PSXPRPTDEFN), Organization Recipient Usage (ORG_RCP_USAGE), Name Usage Table (NAME_USAGE_TABLE), and Address Usage Table (ADDR_USAGE_TABLE).

This section provides an overview of setting up the Communication Generation process and discusses how to:

- Create a template.
- Create valid PeopleSoft queries and application classes.
- Create a data source file.
- Create a report definition.
- Define organization communication recipient usages.

Understanding the Communication Generation Process Setup

You can set up your PeopleSoft system to generate letters and emails using the Communication Generation process. The process uses Oracle BI Publisher included in PeopleSoft PeopleTools. To use Oracle BI Publisher with PeopleSoft Campus Solutions Communication Generation process, you must set up the elements as described in this section.

The concept of setting up the Communication Generation process includes the following steps:

1. Create a draft template and identify which variables to include.
2. For each variable, identify the corresponding record fields from which to get the data.
3. Create one or more queries or application classes to use to select the record fields.
4. Create a communication data source from within Campus Community and specify the queries or application classes to use for that data source.

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5. Finalize the template using either the delivered Oracle BI Publisher template builder for Microsoft Word to create RTF templates or other software to create other template formats such as PDF by adding the variable tags from the data source.

6. Create a report definition to upload the template and associate it with the communication data source.

7. Associate a letter code with the report definitions that include the templates and communication data sources that you want to make available for generating the communication.

Pages Used to Set Up the Communication Generation Process

Page Name	*Definition Name*	*Navigation*	*Usage*
Communication Data Source	SCC_CG_DTASRC	• Campus Community, Communications, Set Up Communications, Communication Data Source • Set Up SACR, Common Definitions, Communications, Communication Data Source	Identify the source to use and specify the fields to extract data from that source. The extracted fields can be specific to one template or can be reused in multiple templates. Also use the Communication Data Source to identify what record fields the Communication Generation process should consider critical data for producing the outputs. **Note:** For the Communication Generation process to succeed, you must create the data source from the Communication Data Source page inn PeopleSoft Campus Community. Do not create the data source from within PeopleTools.
Definition	PSXPRPTDEFN	Reporting Tools, XML Publisher, Report Definition	Define a report to associate the data source and the Oracle BI Publisher template. See *PeopleTools: BI Publisher for PeopleSoft*
Template	PSXPRPTTMPL	Reporting Tools, XML Publisher, Report Definition, Template	Identify the Oracle BI Publisher templates into which to merge data from the source file. See *PeopleTools: BI Publisher for PeopleSoft*

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Page Name	Definition Name	Navigation	Usage
Output	PSXPRPTOUT	Reporting Tools, XML Publisher, Report Definition, Output	Select the PDF option on the Output page to include report definitions that must be printed. PeopleTools Oracle BI Publisher supports only PDF files for printing. See *PeopleTools: BI Publisher for PeopleSoft*
Bursting	PSXPRPTBURST	Reporting Tools, XML Publisher, Report Definition, Bursting	Enter the Burst By value to separate the outputs that the Communication Generation process generate. The value of *fld_CG_SORT_ORDER* is the only available or valid value for a Report Definition that is associated with a data source that was created through Campus Community's Communication Data Source component. If you enter a different value or if you leave the field blank, the Communication Generation process will force the bursting value to *fld_CG_SORT_ORDER* at run time. The process uses the bursting value for several reasons including to separate the outputs that it generates and send them to the printer according to the order specified on the Communication Generation run control page. Bursting and ordering are required for producing letter and email outputs from the Communication Generation process. See *PeopleTools: BI Publisher for PeopleSoft*
Org Communication Recipient Usage Table	ORG_RCP_USAGE	Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Organization Recipient Usage, Org Communication Recipient Usage Table	Define usages for recipients of communications assigned to organizations when no recipient is specified.

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Page Name	Definition Name	Navigation	Usage
Name Usage	NAME_USAGE_TABLE	Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Name Usage Table	Define name usages to specify the hierarchies of name types that you want to use in a specific usage. See Establishing Name Usages.
Address Usage	ADDR_USAGE_TABLE	Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Address Usage Table	Define or review address usages by specifying hierarchies of address types or email type to search for and use in a specific usage. See Establishing Address Usages.

Creating a Template

You cannot automatically convert a Microsoft Word letter template designed for the Letter Generation process to a template for the Communication Generation process. However, you can use the Letter Generation template to determine which record fields need to be extracted and include them in a communication data source for an Oracle BI Publisher template for Communication Generation process.

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

Creating Valid PeopleSoft Queries and Application Classes

Create queries or application classes to identify the record fields to use to extract data to place in a template. You assign queries and application classes to the communication data source that you associate with the letter code to use. You can reuse queries and application classes for different letter codes.

Queries

Use PeopleSoft Query Manager to create queries based on the administrative function used in the associated communication data source. The system evaluates each query when you register the communication data source and registers only the queries that it validates can be successfully executed by the Communication Generation process.

See *PeopleTools: Query*

If you require criteria to be supplied at run time, create query prompts and add them as criteria to your query definition. The process can accept only query prompts for retrieving person and organization IDs and their variable data associated with the administrative function that is specified in the communication data source. You can also include the Communication record in your query and use the SEQ_3C field as a prompt to access values from the Communication record.

Warning! You must include at least query prompts that retrieve person ID or organization ID or a combination of the two.

While creating the query, after identifying the fields to use as prompts, you must click the Edit button on the corresponding Prompts page of the Query Manager component, and change the value in the Unique

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Prompt Name field to a value that will prompt for the desired data. This is the only way the process will know what data to pass to the prompt list.

To prompt for person ID, enter the Unique Prompt Name of *PERSON_ID.*The typical key field for persons in transaction tables is EmplID. However, entering *PERSON_ID* enables the process to select person data from tables with a different person ID key field. The process searches for *PERSON_ID* and assigns the COMMON_ID for person communications to the query prompt.

To prompt for organization ID, enter the Unique Prompt Name of *ORG_ID.* The typical key field for organizations in transaction tables is EXT_ORG_ID. However, entering *ORG_ID* enables the process to select organization data from tables with a different organization ID key field. The process searches for *ORG_ID* and assigns the COMMON_ID for organization communications to the query prompt.

To prompt for both person and organization ID, enter the Unique Prompt Name of *COMMON_ID.* The typical key field used in shared transaction tables is COMMON_ID. Entering *COMMON_ID* enables the process to select person and organization data from shared tables with a different common ID key field. The process searches for *COMMON_ID* and assigns the COMMON_ID for person and organization communications to the query prompt. The process uses the SA_ID_TYPE field at run time to place the COMMON_ID for the communication into the correct person or organization query prompt field.

To use values from the Communication table to join with other data tables in your query, you can create a prompt for the communication sequence field (SEQ_3C). For this field, enter the Unique Query Prompt of *SEQ_3C.* The process searches for *SEQ_3C* and assigns the SEQ_3C for the communication to the query prompt.

For example, to join to the Communication table in your query criteria, write:

```
select A.FIELD1, A.FIELD2
from PS_SCC_TABLE A, PS_COMMUNICATION B
where A.INSTITUTION = B.INSTITUTION
and A.EMPLID = B.COMMON_ID
and B.COMMON_ID = Query Prompt1
and B.SEQ_3C = Query Prompt2
```

This joins a transaction table PS_SCC_TABLE, which is keyed by INSTITUTION and EMPLID, to the PS_COMMUNICATION table to resolve the institution value for the communication being generated.

To use variable data from the communication to prompt for administrative function data, create a query prompt for the variable data fields associated with the administrative function specified in the communication data source. Enter the variable data field name in the Unique Prompt Name field. The process searches for the field name and assigns the variable data for the communication to the query prompt.

For example, assume that the communication data source uses the ADMA (Admissions Application) administrative function. ADMA has a dedicated table called VAR_DATA_ADMA. The variable data fields on the table that are assigned for this type of communication are ACAD_CAREER, STDNT_CAR_NBR, and ADM_APPL_NBR. To prompt for the ACAD_CAREER field, enter a Unique Prompt Name of *ACAD_CAREER.*

Warning! You must list each prompt that you create as criteria in the Criteria page of the Query Manager component.

After you create the query definitions, you can include them in a communication data source. When you click the Register Data Source button on the Communication Data Source component, the system evaluates each query and registers only the queries that are executable by the Communication Generation

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process. The system compares the setup of the query prompts with the information in the Data Source Context of the Communication Data Source as follows:

1. Validate Person/Organization check boxes:
   - Person only: Valid Unique Prompt Names include *PERSON_ID, COMMON_ID,* and *SEQ_3C.*
   - Organization only: Valid Unique Prompt Names include *ORG_ID, COMMON_ID,* and *SEQ_3C.*
   - Person and Organization combined: Valid Unique Prompt Names include *PERSON_ID, ORG_ID, COMMON_ID,* and *SEQ_3C.*
2. Validate Administrative Function value: Valid Unique Prompt Names include the record.field *VAR_DATA_%.FIELDNAME* where *%* is the value of the administrative function used in the Data Source Context. The valid values are the field names used in the dedicated Variable Data table for the specified administrative function.

After registering the data in the Communication Data Source, the output from the query is appended at the end of the generated sample data file and is ready for use in an Oracle BI Publisher template.

Note: If you need to manipulate your custom extract data in ways that cannot be accomplished using PS Query, you can use PeopleTools Application Designer to create application classes (App Classes), which are also compatible with the Communication Generation process.

See *PeopleTools: PeopleCode API Reference*, "Application Classes."

Application Classes

Use PeopleTools Application Designer to create custom application classes to extract and manipulate data using standard PeopleTools logic. Each application class can be created with your own validation logic to assure that it can be successfully executed by the Communication Generation process.

See *PeopleTools: PeopleCode API Reference*, "Application Classes."

When you create a custom PeopleTools application class to use in a Communication Data Source, you must include methods required by the Communication Generation process. You can insert your own PeopleCode logic into the required methods to extract and manipulate the data to include in your Communication Data Source. You can also create and call your own methods in addition to the required methods.

The PeopleSoft system delivers a base application class called *CommGenDSAbstract* to use in the creation of all custom application classes for the Communication Generation process. This application class is never called directly, but provides the structure for creating all custom application classes for use with the process. The system also delivers a sample application class named *AppClassAdapter,* which was created from the base.

Follow these steps to access the base and sample application classes:

1. Open the *SCC_COMMGEN* application package in Application Designer.
2. Access the*Model* sub package.
3. Within the Model sub package, access the *CommGenDSAbstract* application class, which is the base application class.

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4. Within the Model sub package, access the *DSAdapters* package.

5. Within the DSAdapters package, access the *AppClassAdapter* application class, which is the sample application class.

Follow these steps to create a custom application class that is valid for the Communication Generation process:

1. The application class must inherit the structure of the base *CommGenDSAbstract* application class.

   For example, the sample application class *AppClassAdapter* implements SCC_COMMGEN:Model:CommGenDSAbstract.

2. At a minimum, you must use the following two methods:

   - The Validate method `Method Validate(&strContext As string, &arrValidBindFields As array of any)` which will be called when the user clicks the Register Data Source button on the Communication Data Source page. No further validation code is required. The method will always be passed the Data Source Context (person, organization, or both) and an array of the variable data field names associated with the administrative function selected in the context.

     For example, assume that you want to validate that the custom application class is used only in Communication Data Sources where only the Person check box is selected in the Data Source Context. The variable`&strContext` which is passed into the method contains each of the following values:

     P for Person Communications

     O for Organization Communications

     PO for Person and Organization Communications combined.

     You can issue an error message to the user if the context of the Communication Data Source is for organizations *(O)* or both *(PO)*.

   - The BuildAdapterRowset method `BuildAdapterRowset(&rowResult As Row, &booVarData As boolean) Returns Rowset` which will be called when the Communication Generation process runs. The method will always be passed a PeopleCode row object containing communication and variable data information for the communication in context. It will also be passed a Boolean value of *True* or *False* indicating whether the Communication Data Source uses an administrative function that contains variable data. While most administrative functions have associated variable data, some do not. For example, the GEN (general) administrative function does not.

     This method will always return a rowset PeopleCode object to be appended to the extract data. The rowset object that you construct can be of any PeopleTools supported structure.

     The *AppClassAdapter* example application class uses the keys from the communication (COMMON_ID, SEQ_3C) to join to the Communication table and extract the descriptions for the institution. This is the institution by which the communication was assigned.

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Warning! You can create new application packages that contain any number of custom application classes for use in building custom extract data for the Communication Generation process, but you should not modify the delivered *SCC_COMMGEN* application package when creating your own custom application classes.

After you create the custom application classes, you can include them in a communication data source by selecting the Type of *App Class*.on the Communication Data Source page. When you click the Register Data Source button, the systems evaluates each application class and registers only the application classes that are executable by the Communication Generation process.

The system evaluates and validates each application class as follows:

1. Instantiate the custom App Class object.

   If the path is incorrect or the application class does not exist, a standard PeopleTools error message appears stating that the object could not be opened.

2. Call the Validate method for the custom application class, and perform the code check, if any.

After registering the data in the Communication Data Source, output from the application classes is appended at the end of the generated sample data file and is ready for use in an Oracle BI Publisher template.

See:

- See *PeopleTools: PeopleCode API Reference*, "Application Classes."
- Creating a Data Source File

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Creating a Data Source File

Access the Communication Data Source page (Campus Community, Communications, Set Up Communications, Communication Data Source).

Image: Communication Data Source page (1 of 2)

This example illustrates the fields and controls on the Communication Data Source page (1 of 2). You can find definitions for the fields and controls later on this page.

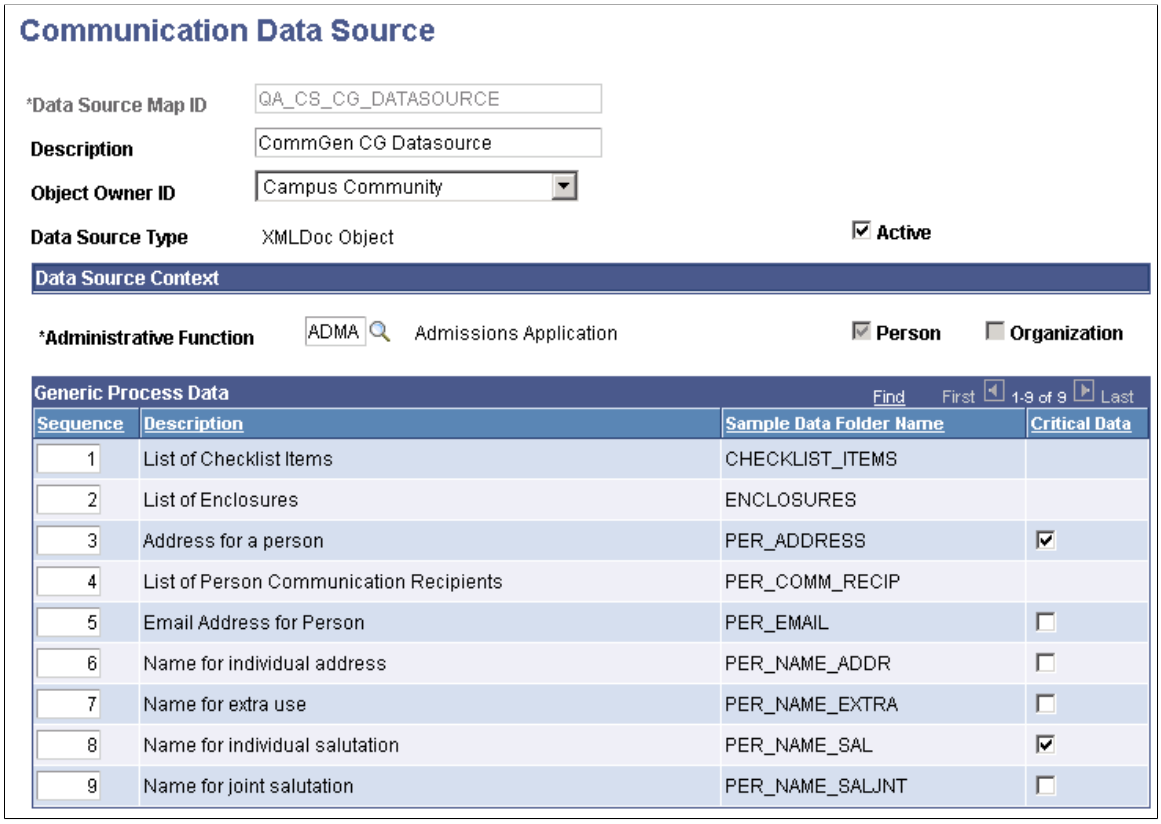
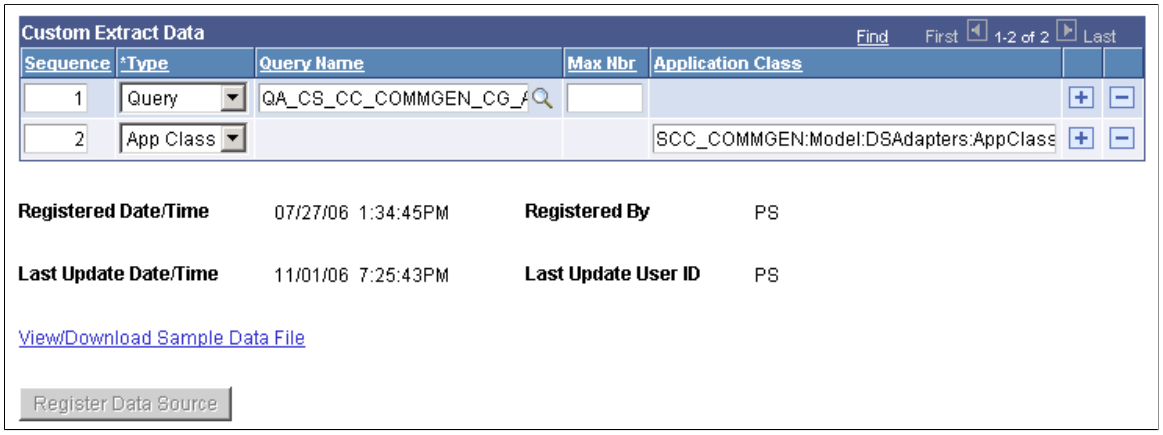


Image: Communication Data Source page (2 of 2)

This example illustrates the fields and controls on the Communication Data Source page (2 of 2). You can find definitions for the fields and controls later on this page.



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Data Source Map ID

Displays the unique mapping ID that links the Oracle BI Publisher data source to the Communication Generation process metadata.

If you are creating a new data source, the system temporarily displays what you entered when you chose Add a New Value.

When you click the Register Data Source button to save and register the data source, the system creates or updates the Data Source Map ID and displays it here.

Warning! For the Communication Generation process to run successfully, you *must* create and update the data source from within Campus Community as described in this section. Do *not* create the data source from within PeopleTools Oracle BI Publisher. The Register Data Source button on the Communication Data Source page in Campus Community automatically stores the data source inside the PeopleTools tables. This button also keeps the data source created within Campus Community synchronized with the information in the PeopleTools tables for you.

Object Owner ID

(Optional) Enter the PeopleSoft product responsible for this data source and the map ID.

Data Source Type

Displays *XMLDoc Object,* which is the only type of object that the Communication Generation process processes. You cannot change this value.

The system requires this information to access the data source from the Tools Data Source component Oracle BI Publisher.

Active

Select to make the data source active and available to users. Clear to preserve the definition but prevent the data source from being available to users.

Data Source Context

Information in this group box shows in which context the data source can be used.

Administrative Function

Enter the administrative function to use for this data source.

The administrative function is used to filter which data source will be available for which Letter Code. The value selected identifies whether the communication can be sent to a person, an organization, or both.

Person and **Organization**

The system indicates the types of IDs that can receive communications based on the administrative function.

If the function permits communications with both persons and organizations, both check boxes are available for editing. You

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can select or clear the check boxes to limit the communications to either persons only or organizations only.

Generic Process Data

The system lists the generic data that the Communication Generation process must always extract to accommodate all of the Campus Solutions communication features. The data varies depending on whether the context is for a person, an organization, or both. Each of the features is associated with the names of the records into which the extracted data will be placed for the Oracle BI Publisher templates. You can prioritize the order of the records using sequencing, but you cannot add or delete any of them.

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

Custom Extract Data

You can use queries or application classes to identify additional data to extract. You can use multiple queries, application classes, or combinations of both.

Type

Enter the type of tool to use to identify the data to extract, either *Query* or *App Class*.

Do not add values or modify the delivered values.

Query Name or **App Class Name**

The field name changes based on the Type selected, either *Query* or *App Class*.

For the Query Name field, available values are limited to queries to which the user has security access. The Register Data Source feature evaluates each query and registers only the queries that it validates to as executable by the Communication Generation process.

For the App Class Name field, enter the application class in the same format as the sample application class, which is *SCC_COMMGEN:Model:DSAdapters:AppClassAdapter.*

See Creating Valid PeopleSoft Queries and Application Classes.

Max Nbr (maximum number)

(For queries only.) Enter the maximum rows of data for the query to extract.

Note: To extract all the possible values for an ID, leave the Max Nbr field blank. For example, if your query includes the ACAD _CAREER field and an ID has an application for 5 different academic careers, when the field is blank the query will extract 5 of the values. If you want to extract only 2 values, set the maximum number to *2*.

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The MaxNbr field on the Communication Data Source page does not apply when you are using an application class for custom extract data. PeopleTools does not support the ability to restrict the number of rows selected into a Standalone Rowset by simply passing a maximum number into the Rowset Fill method. You can control the number of rows of data to append to the extract either within the selection criteria or by manipulating the Standalone Rowset after it has been filled.

View/Download Sample Data File

Available only after the data source is registered.

Click to view the Oracle BI Publisher file to determine where the sample data placeholders are for the data to extract.

You must download the Oracle BI Publisher file and load it into the XML templates using the delivered design helper tool. The file contains all the fields that the Communication Generation process will extract. You can include these fields as variables in your templates. The collapsible sections in the XML file correspond to the folder names listed in the Generic Process Data group box in the Communication Data Source page. If the Communication Data Source includes a query or application class, the query or application name appears in the list at the end of the XML file.

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

Register Data Source

Click to create or update the data source ID in the PeopleTools record. When you do, theRegister Data Source button becomes unavailable, the View/Download Sample Data File link appears, and the system populates the audit information fields with the date and the user ID who registered the data.

To ensure that the data source created in the Campus Community component remains synchronized with the data source stored in the PeopleTools record, each time you make a change to the Campus Community data source, the system hides the View/Download Sample Data File link, reactivates the Register Data Source button and displays a message telling you to click the Register Data Source button to update the Oracle BI Publisher data source. When you click the Register Data Source button again, the system recreates the sample data file and updates the PeopleTools record for you.

You can make as many changes as you want, but you must register the data source again for the system to accept and use the changes and for the system to update the Data Source Map ID in the PeopleTools record.

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Creating a Report Definition

You must define a report and associate with it, the communication data source from which to extract data and the Oracle BI Publisher templates into which you want to merge the extracted data. Report definitions are a function of PeopleTools Oracle BI Publisher Reporting Tools, XML Publisher, Setup, Report Definition.

You must associate the report definition with the letter code to use so that the Communications Generation process knows which template and data source to use to create the communication.

See:

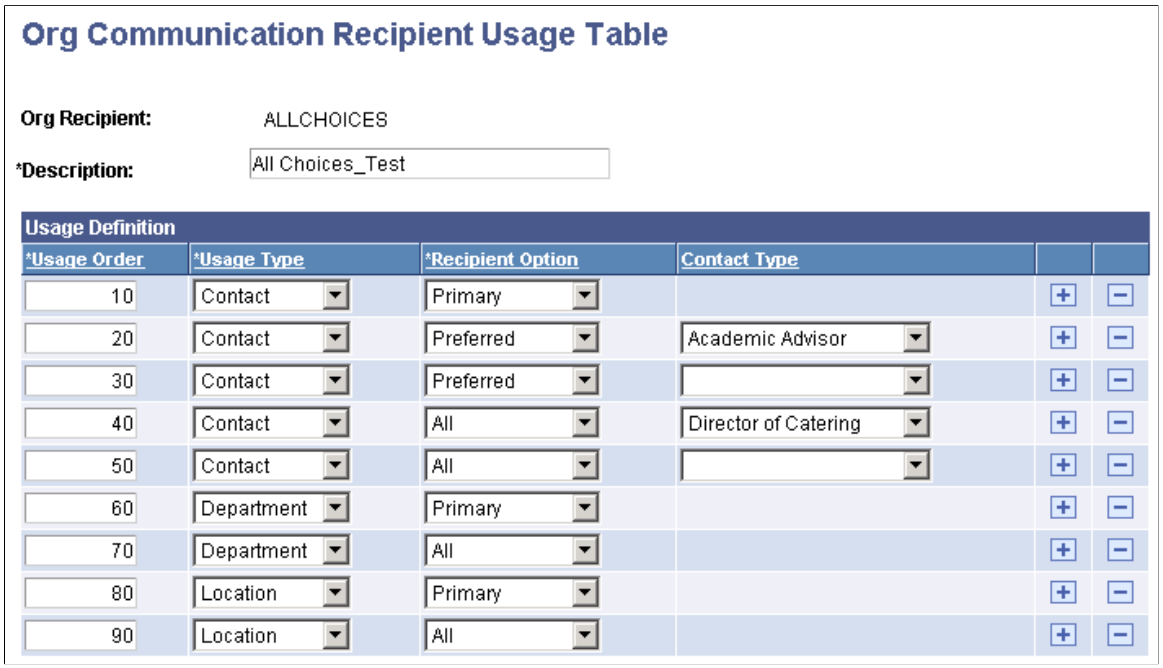
- Creating a Report Definition
- Defining Letter Codes
- Using the Communication Generation Process

Defining Organization Communication Recipient Usages

Access the Org Communication Recipient Usage Table page (Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Organization Recipient Usage, Org Communication Recipient Usage Table).

Image: Org Communication Recipient Usage Table page

This example illustrates the fields and controls on the Org Communication Recipient Usage Table page. You can find definitions for the fields and controls later on this page.



Set up prioritized usages for the Communication Generation process to use to identify recipients if no recipients are specified on the Org Communication Management page.

Enter a Usage Type to send the communication to a *Contact, Department,* or *Location* for an organization.

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After you select the Usage Type, use theRecipient Option field to specify whether to send the communication to *All,* to the *Preferred,* or to the *Primary* contact, department, or location.

If you select a Recipient Option of *Contact,* use the Contact Type field to specify the type of contact. For example, to define a usage order to send the communication to all contacts who are academic advisors, enter a Usage Type of *Contact,* a Recipient Option of *All,* and a Contact Type of *Academic Advisor.*

Usage Type, Recipient Option and Contact Type values are translate values. They should not be modified.

Related Links

Designing Campus Community

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