


# Communications: Generate an Online Preview

**Purpose:** Use this document as a reference to generate a communication online preview to see how the emails will be sent in ctcLink.

**Audience:** College staff responsible for running the Communication Generation process.


## Communication Generation

 Once the **3C Engine** process has been run (which creates the communication record for the selected population), the **Communication Generation** process can be set up and run.

Alternatively, you can [assign the communication to one of your college's test IDs](#) that starts with XX, provided they have the necessary variable data for the administrative function.

Each institution has been provided with **three approved accounts**: XX###CS01, XX###CS02, XX###CS03 \*(replace ### with your college's three-digit WA### code). Using unapproved accounts can severely impact several critical systems, including data, reporting, FTEs, and Financial Aid. If you are or become aware of any testing (fake, not real, duplicate) accounts, please bring it to our attention with a ticket. Pro Tip! Set up student login credentials for your approved Testing Accounts.

Communication Generation is used for extracting data, including recipient IDs for which data is to be extracted, the Letter Code, the Report Definition name, and the method for generating the email. With this in mind, users can enter an email address to see how emails will be sent. Ideally, this would be useful when testing [updating a letter template and merging fields](#).

 You must have at least one of these local college managed security roles:

- **ZC CC 3Cs User**
- **ZD CC 3Cs User**

- **ZZ CC 3Cs User**

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

## Run Control ID Search Page

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

1. The **Communication Generation Run Control ID** search page displays.
2. If you have run this process or report in the past, select the **Find an Existing Value** tab to enter an existing Run Control ID and select the **Search** button. If this is the first time running this process or report, select the **Add a New Value** tab to create a new Run Control ID and select the **Add** button.
3. **NOTE:** It is important to note that **Run Control IDs** cannot be deleted. Do not include spaces in your Run Control. We encourage the Run Control ID to have the same process naming convention but unique to the step; because of this, including your institution code and a short process description in the Run Control ID is recommended--e.g., WA220\_COMMGEN.

## Selection Parameters Tab

1. The **Selection Parameters** tab displays.
2. **ID Selection:** Select the appropriate communication recipients.
  - a. **All IDs:** All person and organization IDs system-wide. (Rarely used)
  - b. **All Org IDs:** This will select all organization IDs system-wide. (Rarely used)
  - c. **All Person IDs:** All person and organization IDs system-wide. (Common)
  - d. **One Org ID:** Opens a box to input a single Organization ID. (Rarely used)
  - e. **One Person ID:** Opens a box to input a single Person ID. (Common)
  - f. **Population Selection:** Selects a Population using a query, equation engine, or external file load (Common)
    - i. **Equation Engine:** (Rarely used).
      1. Equations are set up at the system level; contact a ctcLink system administrator for assistance.
      2. The look-up menu for the **Equation Name** displays available equation engine names.
    - ii. **External File:** (Common).
      1. Create a **. CSV file using** Excel:
      2. Open an Excel Spreadsheet.
      3. Enter ctcLink student IDs with one ID per cell in a single column.
      4. Save the Excel file as a . CSV.
  - g. Select **Upload File** and browse for the file created in the previous steps.

- h. Select the [Create File Mapping](#) link to map the uploaded file.
    - i. Enter the name of the mapping criteria in the **File Mapping** field.
    - ii. If the file has no **Header Row**, leave the checkbox and **Header Row Number** field blank.
3. Select the [Create File Mapping](#) link to map the uploaded file.
  - a. Enter the field number of the column containing the student IDs to allow the process to read the data only from that column.
4. Select **OK**.
  - a. **PS Query:** (Common)
    - i. Look up the appropriate query name (only queries valid for the specific process are available).
    - ii. If Prompt values are required in the query, Select the **Edit Prompts** link and input the necessary values.
5. **Letter Code.**
  - a. Only letter codes for the Communication Generation process and currently assigned to the specified IDs are available in the Letter Code field. Letter Codes are set up at the system level; contact a ctcLink system administrator for assistance.
  - b. Enter the Letter code and tab out of the field.
    - Based on the letter code selected, the Template selection will display the details for the communication to be generated.
6. **No Matching Template Found.**
  - a. If there is no template in the selected language, the selection made in this field determines how the system will handle this communication generation. For example, suppose the chosen language is German, and no template is written in German. In that case, the system will either not produce the communication (it will show as an error) or use the default template, which is likely in English, dependent upon the selection made.
7. **Communication Language Usage.**
  - a. **Specified** (default)
  - b. **Language:** English (default)
8. **Communication Method Usage.**
  - a. **Specified** (default)
  - b. **Method:** Activate the drop-down list and choose E-Mail
9. Select the **Process Parameters** tab.

## Video Tutorial


The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

# View Tutorial Via Panopto

View the external link to [Communication Generation - Selection Parameters Tab](#). This link will open in a new tab/window.

## Process Parameters

1. Select the **Process Parameters** tab.
2. The **Process Parameters** tab displays.
3. **Usage Tables**
  - a. **Person Communication Usage:** These selections are connected to Name/Address Usage rules.
    - i. Select the **Address**, **Address Name**, **Salutation**, and **Extra Name** usage for the communication sent.
    - ii. **Joint Salutation Usage:** Not used
    - iii. **Org Communication Usage:** Needed in cases where an organization ID could be included in the selection. Select based on Org and Name usage.

 Usage selection for address is connected to the method being sent. For example: If the communication method is **E-mail**, an email usage like **Student Email** should be selected from the drop-down menu.

4. **Communication Processing Dates:**
  - a. **Communication Date Range Selection:** The process will only pick up Communications assigned to ID during the date range specified.
  - b. **Update Communication Generation Date With:** This selection updates the date the communication was assigned with the selection specified.
  - c. **Update Communication Completion Date With:** This selection updates the date the communication was sent with the selection specified.
  - d. Date Options Defined
    - i. **Communication Date:** Select the date the communication was assigned in the system.
    - ii. **System Date:** The current date.
    - iii. **User Supplied Date:** Opens a box to enter a custom date.

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## Output Settings

1. **Sort Option:** Default value Country, Postal.
2. Select the **Online Preview** checkbox.
3. The **Email Address** page appears. **Enter an email address you can access.** The online preview functionality extracts data only for the first 10 IDs when generating communications for multiple IDs.
4. **Missing Critical Data** check box for the process to produce and/or complete the communication even if critical data is missing.
  - a. For example, if the method is email, but the student is missing an email address, it will Produce the communication, which attaches as a PDF on the Communication Management page. This PDF can then be printed and mailed to the student.
5. Select the **Email Parameters** tab.

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## Email Parameters

1. The **Email Parameters** tab displays.
2. They are only used when **E-Mail** is selected on the Selection Parameters tab.
  - a. **From:** Enter the email address of the person or entity sending the email. (e.g., example@tacomacc.edu).
  - b. **Subject:** Email topic.
  - c. **Reply to:** If the student replies, this is the email address that will receive the response email.
  - d. **Sender:** Enter the email address of the person or entity sending the email. (e.g., example@tacomacc.edu).
  - e. **Bounce to:** If the email is undeliverable, this is the email address that will receive the email.
  - f. In the **Importance** and **Sensitivity** group boxes, select the appropriate options.

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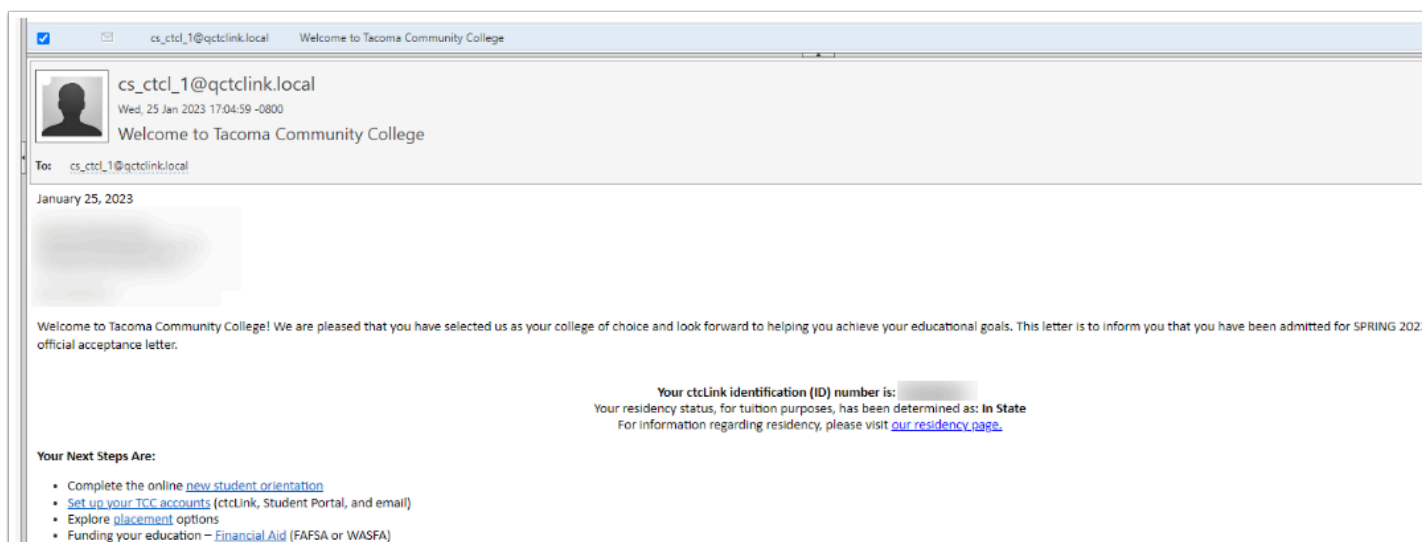
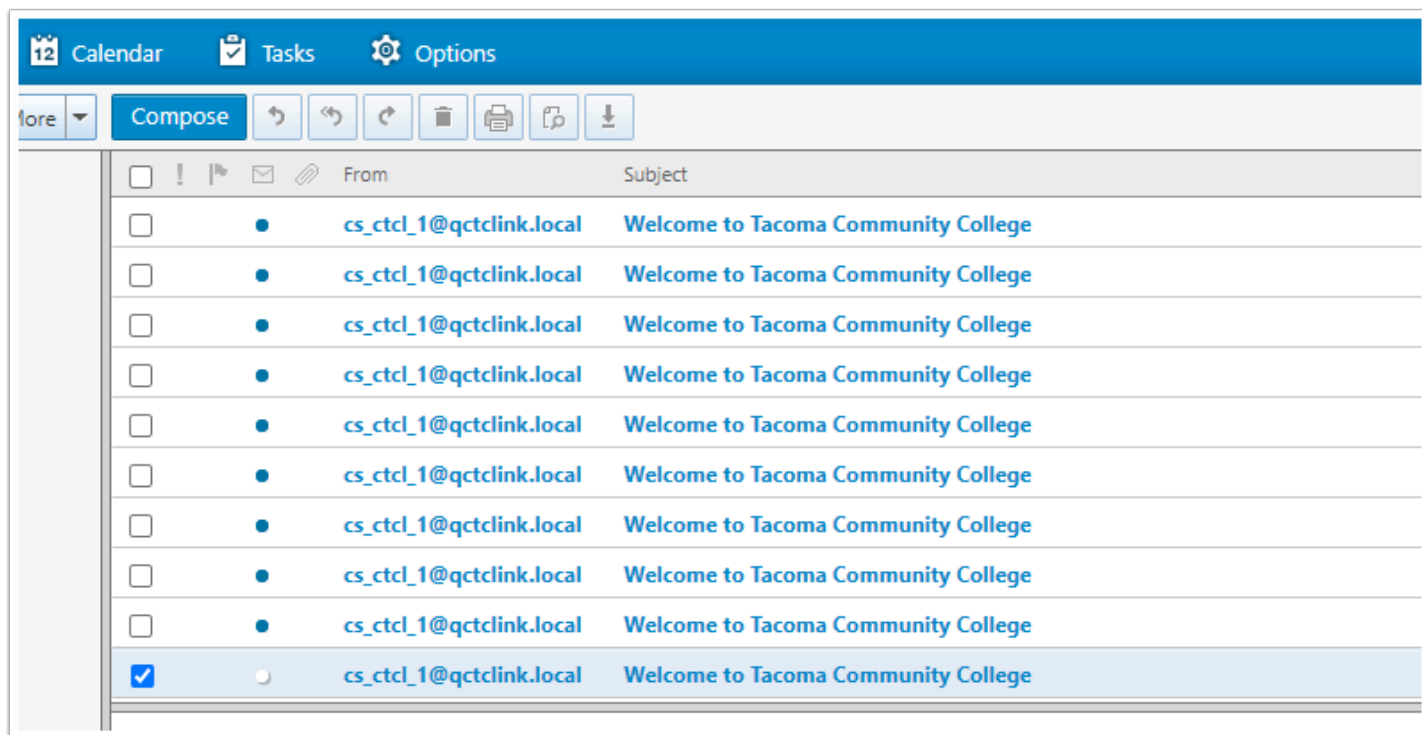
# Checklist Parameters

1. The **Checklist Parameters** tab displays.
2. They are only used when checklist items are extracted as a part of the communication being sent.
  - a. **Administrative Function:** Select one or more checklist types by selecting the **Add a New Row [+]** icon.
  - b. **Checklist Context:**
    - i. **Checklist Type:** Enter the types of checklists from which the process should extract data for this letter or email.
    - ii. **Tracking Group:** Enter the tracking group codes with checklist item data that should be extracted for this letter or email.
    - iii. **Checklist Code:** Enter the specific checklist codes with checklist item data that should be extracted for this letter or email.
  - c. **Checklist Item Status:** Select an appropriate value (e.g., Active). Multiple statuses can be selected by selecting the **Add a New Row [+]** icon.
3. Select **Run**. Please refer to the [Process Scheduling](#) QRG for instructions.

The screenshot shows the 'Checklist Parameters' tab in the 'Communication Generation' interface. The top navigation bar includes 'Student Homepage' and 'Communication Generation'. Below this, there are tabs for 'Selection Parameters', 'Process Parameters', 'Email Parameters', and 'Checklist Parameters'. The 'Run Control ID' is 'WA220\_COMMGEN'. There are links for 'Report Manager', 'Process Monitor', and a 'Run' button. The 'Checklist Item Selection' section shows 'Administrative Function' as 'ADMA' (Admissions Application) and a checkbox for 'Respect Variable Data'. The 'Checklist Context' section has three radio buttons: 'Checklist Type' (selected), 'Tracking Group', and 'Checklist Code'. The 'Checklist Type' section shows a table with one row: 'Requirements List'. The 'Checklist Item Status' section shows a table with one row: 'Active'. Red boxes highlight the 'ADMA' text, the 'Checklist Context' section, the 'Checklist Type' dropdown, and the 'Active' status.

## Received Email(s)

1. Once the process runs to Success and Posted, access the email entered in the [Output Settings](#) panel. Confirm if email(s) were received.



2. The communication will not be marked as Completed, and no information will be entered into the **Communication Management** component for the person or organization. The remaining emails will be marked as **Complete**, and the link to **View Generated Communications** will be available.
3. Process complete.