

9.2 Communications - Assigning and Sending PeopleSoft Communications (3C Engine and Communication Generation)

Purpose: Use this document as a reference for assigning and sending ctcLink communications.

Audience: College staff responsible for assigning and sending communications.

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

- ZC 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.

Prior to running the Communication Generation process, the communications set up process must be completed. Users that are running ctcLink communications will need to gather the following details/recommendations from their on-campus Communication Builders (users that are responsible for maintaining and configuring ctcLink communication data):

- 3C Engine Event ID with Administrative Function
- 3C Engine Population Selection Query Name
- 3C Engine Duplicate Management recommendation
- Communication Generation ID Selection parameter (All IDs, Population Selection Query Name, etc.)
- Communication Generation Name/Address usage requirements
- Communication Generation Email Parameters

Step 1: Run the 3C Engine

Navigation: NavBar > Navigator > Campus Community > 3C Engine > Run 3C Engine

i Running the 3C Engine will assign the ctcLink communication to students defined in the population selected by the process.

1. The **3C Engine** run control ID search page displays.
2. Select the **Add a New Value** tab to create a new Run Control ID and select **Add**. *It is important to note that Run Control IDs cannot be deleted; therefore, we encourage them to be reused. Because of this, including your institution code and a short process description in the Run Control ID is recommended--e.g., WA220_3CEngine. This only has to be done once.*

3C Engine

Find an Existing Value | **Add a New Value**

Run Control ID: WA220_3CEngine_GEN

Add

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

3. To use an existing Run Control ID, click on the **Find an Existing Value** tab and select **Search**.
4. Existing Run Control ID(s) displays below.
5. Click on the appropriate Run Control ID.

User Defaults 1

3C Engine

3C Engine

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

Find an Existing Value

Add a New Value

Search Criteria

Run Control ID

begins with

WA220_3CEngine_GEN

☐ Case Sensitive

Search

Clear

Basic Search

Save Search Criteria

Search Results

View All

1-1 of 1

Run Control ID	Language Code
WA220_3CEngine_GEN	English

Find an Existing Value

Add a New Value

6. The **3C Engine Parameters** tab displays.
7. Select **Population Selection**. Additional parameters display at the bottom of the page.
8. Select **No Joint Processing**.
9. Enter **Academic Institution**.
10. Enter **Administrative Function**.
11. Enter **Event ID**.
12. Enter **Selection Tool** = "PS Query".
13. Enter the appropriate **Query Name**.
14. Select **Edit Prompts**.

[User Defaults 1](#)
Run 3C Engine

[3C Engine Parameters](#)
[Manage Duplicate Assignment](#)

Run Control ID: WA220_3CEngine_GEN
 [Report Manager](#)
[Process Monitor](#)
[Run](#)

Process 3Cs

☒ Population Selection
☐ Trigger Table
☐ Mass Change

Process Joint Records

☒ No Joint Processing
☐ Yes, all Joint IDs
☐ Yes, if match exists

Event Selection

Academic Institution: WA220 Tacoma CC
 Administrative Function: ADMA Admissions Application
 Event ID: AGAADMACP Gen Admissions Acpt

[Detail](#)

[Communication Key](#)
 AGENADMA General Admissions Admit

[Checklist Code](#)

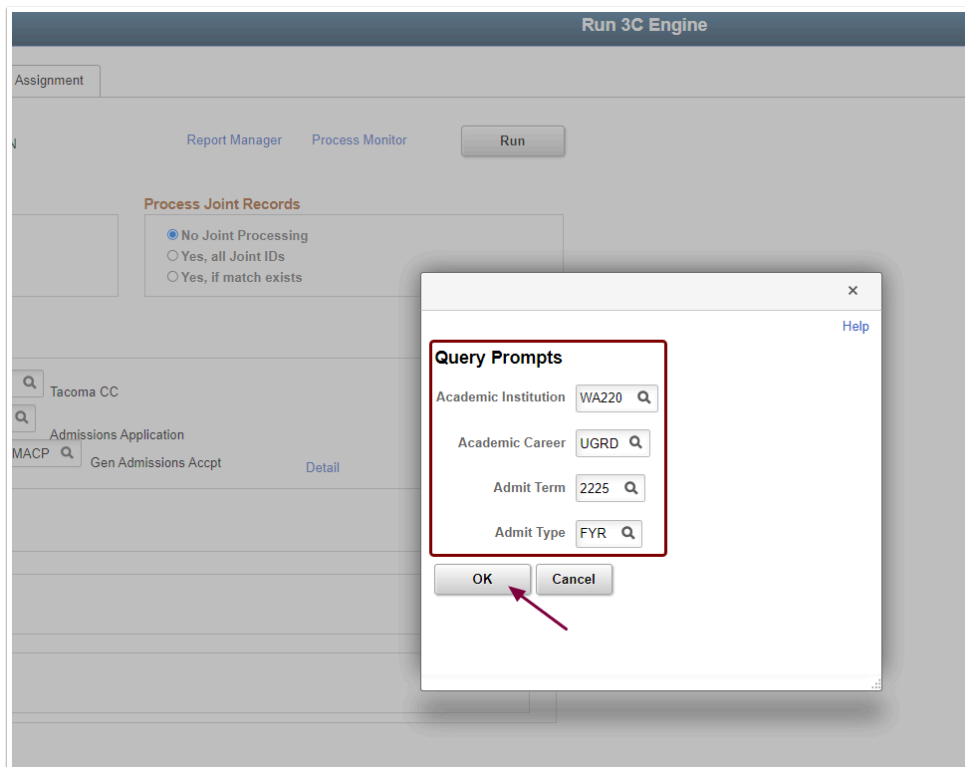
[Comment Category](#)

Population Selection

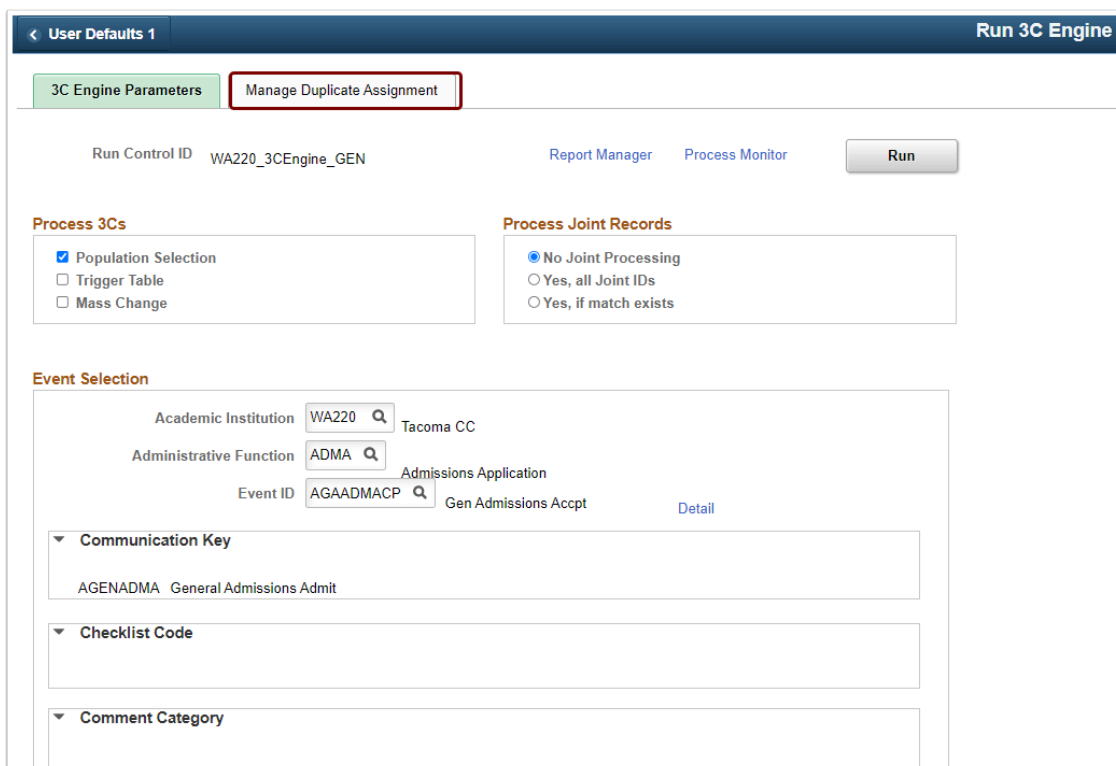
Selection Tool: PS Query [Edit Prompts](#)
 Query Name: CTC_AD_3CEngine_RESID [Launch Query Manager](#) [Preview Selection Results](#)


[Save](#)
[Return to Search](#)
[Notify](#)
[Add](#)
[Update/Display](#)

15. The **Query Prompts** window displays.
16. Enter **Academic Institution**.
17. Enter **Academic Career**.
18. Enter **Admit Term**.
19. Enter **Admit Type**.
20. Select **OK**.



21. The **Query Prompts** window disappears.
22. Select the **Manage Duplicate Assignment** tab.



 When using a PS Query it is recommended to run the Query in Query Manager/Viewer or to select the **Preview Selection Results** to verify that the IDs that will be assigned the communication are as expected.

23. The **Manage Duplicate Assignment** tab displays.
24. **Check Duplicate Communication:** select this checkbox if you want the assignment process to check for duplicate communications assigned.
25. **Variable Data:** Select one of the following options:
 - a. "Match": Prevents assignment when a communication matches a previously assigned communication that has the same variable data.
 1. *Example: A Student has already received an admission letter for the selected application, this prevents an admission letter from being assigned to the student again. In this case if a second application was submitted by the student, the student **WOULD** get a second admissions letter because the process recognizes this as a new application submitted.*
 - b. "Do Not Match": Prevents assignment when a communication matches a previously assigned communication and the variable data are different.
 1. *Example: A Student has already received an admission letter for an application. This prevents an admission letter being assigned to the student again. In this case if a second application was submitted by the student, the student **WOULD NOT** get a second admissions letter because the process recognizes that the student has already received an admissions letter regardless of how many applications the student may submit.*
26. **Communication Status:** select one of the following options:
 - a. "Completed": Prevents assignment when the communication matches a previously assigned communication for which the status is completed.
 1. *Example: A Student has already been assigned a admissions letter for an application and the Communication Generation process has been run and the Communication Management page shows the status as completed. Working in connection with the selection for variable data above the student would not be assigned a new admissions letter for this application.*
 - b. "Not Completed": Prevents assignment when the communication matches a previously assigned communication for which the status is NOT completed.
 1. *Example: A Student has already been assigned a admissions letter for an application and the Communication Generation process has been run but the Communication Management page shows the status as NOT completed. Working in connection with the selection for variable data above the student **WOULD** be assigned a new admissions letter for this application.*
27. **Check Duplicate Checklist:** select this checkbox if you want the assignment process to check for duplicate checklists assigned.
28. **Variable Data:** select one of the following options:
 - a. "Match": Prevents assignment when a checklist matches a previously assigned checklist that has the same variable data.

- I. Example: A Student has already been assigned an admissions checklist for an application, this prevents the same checklist from being assigned to the student again. In this case if a second application was submitted by the student, the student **WOULD** get a second admissions checklist because the process recognizes this as a new application submitted.
 - b. "Do Not Match": Prevents assignment when a checklist matches a previously assigned checklist and the variable data are different.
 - I. Example: A Student has already been assigned an admission checklist for an application. This prevents an admission checklist from being assigned to the student again. In this case if a second application was submitted by the student, the student **WOULD NOT** get a second admissions checklist because the process recognizes that the student has already been assigned an admissions checklist regardless of how many applications the student may submit.
29. **Checklist Status:** select one of the following options:
- a. "Completed": Prevents assignment when the checklist matches a previously assigned checklist for which the status was set to 'Completed'.
 - I. Example: A Student has already been assigned an admissions checklist for an application and the checklist and all checklist items have been completed. Working in connection with the selection for variable data above, the student would not be assigned a new admissions checklist for this application.
 - b. "Initiated": Prevents assignment when the checklist matches a previously assigned checklist for which the status was set to 'Initiated'.
 - I. Example: A Student has already been assigned an admissions checklist for an application and the checklist and all checklist items have **NOT** been completed. Working in connection with the selection for variable data above, the student **WOULD** be assigned a new admissions checklist for this application.
30. Select **Run**. Please refer to the [Process Scheduling](#) QRG for instructions.

3C Engine Parameters | **Manage Duplicate Assignment**

Run Control ID: WA220_3CEngine_GEN | [Report Manager](#) | [Process Monitor](#) | [Run](#)

Duplicate Communication Check

☒ Check Duplicate Communication [Explain](#)

Additional Conditions to Prevent Duplicate Communication

Variable Data: [Explain](#)

Communication Status: [Explain](#)

Duplicate Checklist Check

☒ Check Duplicate Checklist [Explain](#)

Additional Conditions to Prevent Duplicate Checklist

Variable Data: [Explain](#)

Checklist Status: [Explain](#)

[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Update/Display](#)

3C Engine Parameters | Manage Duplicate Assignment

❗ A Communication can be in COMPLETED status but the process could have been unsuccessful due to other errors in the processing. After running both the 3C Engine Process AND the Communication Generation process it is recommended to run the query CTC_COMMUNICATION_LIST_BY_DATE to review any unsuccessful communications.

❗ 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.

31. Select students from the query used for the population selection to validate the communication was assigned to students on the Communication Management page. It will display as shown in the image below except with the parameters and dates specified based on what was entered in the steps above.

Navigation: NavBar > Navigator > Campus Community > Communications > Person Communications > Communication Management

The screenshot shows the 'Communication Management' web form. At the top, there's a header bar with the title 'Communication Management'. Below it, there are tabs for 'Person Communication' and 'Communication Recipient Data'. The main form area is divided into several sections: 'Communication Assignment' with fields for Assign DateTime, Function, Institution, Communication Key, Category, Context, Method, Direction, and Letter Code; 'Communication Process Details' with fields for Communication Date, Begin Time, End Time, Comments, Communication ID, and Department; 'Communication Outcome' with checkboxes for Communication Completed and Unsuccessful Outcome, and a field for Outcome Reason; and 'Checklist Association' with a field for Checklist Reminder. At the bottom, there are buttons for Save, Return to Search, Notify, Add, and Update. The footer of the form shows 'Person Communication | Communication Recipient Data'.

Step 2: Run the Communication Generation Process

! 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.

Navigation: NavBar > Navigator > Campus Community > Communications > Communication Generation

1. The **Communication Generation** run control ID search page displays.
2. Select the **Add a New Value** tab to create a new Run Control ID and select **Add**. *It is important to note that Run Control IDs cannot be deleted; therefore, we encourage them to be reused. Because of this, including your institution code and a short process description in the Run Control ID is recommended--e.g., WA220_COMMGEN.* This only has to be done once.

← User Defaults 1

Communication Generation

Communication Generation

Find an Existing Value

Add a New Value

Run Control ID

WA220_COMMGEN_GEN


Add

Find an Existing Value

Add a New Value

3. To use an existing Run Control ID, click on the **Find an Existing Value** tab and select **Search**.
4. Existing Run Control ID(s) displays below.
5. Click on the appropriate Run Control ID.
6. The **Selection Parameters** tab displays.
7. **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).
 - A. Equations are set up at the system level, contact a ctcLink system administrator for assistance.
 - B. The look up menu for the **Equation Name** displays available equation engine names.
 - II. **External File:** (Common).
 - A. Create a **.CSV** file using Excel:
 - i. Open an Excel Spreadsheet.
 - ii. Enter ctcLink student ID's with one ID per cell in a single column.
 - iii. 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.

8. Select the **Create File Mapping** link to map the uploaded file.
 - i. Enter the field number of the column containing the student IDs to allow the process to read the data only from that column.
9. Select **OK**.
 - I. **PS Query:** (Common)
 - A. Look up the appropriate query name (only queries valid for the specific process are available).
 - B. If Prompt values are required in query Select **Edit Prompts** link and input required prompt values.

 When using a PS Query it is recommended to run the Query in Query Manager/Viewer or to select the **Preview Selection Results** to verify that the IDs that will have the communication generated are as expected.

10. **Letter Code.**
 - a. Only letter codes set up for the Communication Generation process and that are 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.
 - I. Based on the letter code selected the Template selection will display the details for the communication to be generated.
11. **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, if the language selected is German, and there is no template written in German, the system will either not produce the communication (it will show as an error) or it will use the default template which is likely in English dependent upon the selection made.
12. **Communication Language Usage.**
 - a. **Specified** (default)
 - b. **Language:** English (default)
13. **Communication Method Usage.**
 - a. **Specified** (default)
 - b. **Method:** Select based on the Method identified in the communication configuration. Most delivered communications are set to E-Mail.
14. Select the **Process Parameters** tab.

Person Communication **Communication Generation**

Selection Parameters | Process Parameters | Email Parameters | Checklist Parameters

Run Control ID: WA220_COMMGEN_GEN [Report Manager](#) [Process Monitor](#) [Run](#)

ID Selection

ID Selection: All Person IDs

Letter Code Selection

*Letter Code: A41 General Admissions Admit Administrative Function: ADMA Admissions Application

Template Selection

Report Name: CTCAD_TC_A41 General Adm - Tacoma CC [View Report Definition](#)
Data Source ID: CTC_AD_DATASOURCE_OFFER

Template List

Template ID	Description	Language	Method	Default Template
CTCAD_TC_A41_1	General Adm - Tacoma CC	English	E-Mail	<input checked="" type="checkbox"/>

Enclosures Assigned (Softcopy)

No Matching Template Found [Refresh Enclosure List](#)

☒ Use Default Template ☐ Do Not Produce Communication

Communication Language Usage

☒ Specified ☐ Preferred Language: English

Communication Method Usage

☒ Specified ☐ Preferred Method: E-Mail

[Save](#) [Notify](#) [Add](#) [Update/Delete](#)

15. The **Process Parameters** tab displays.

16. 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 being 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 Email, an Email usage like Student Email should be selected from the drop down menu.

17. **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:** Selects 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.

18. **Output Settings:** used mostly for hard copy communications.

- a. **Sort option:** For hard copy communications, specify the print order for mailing.
- b. **Online Preview:** view the output in Report Manager.
 - I. If the communication method is Email, an Email address box will appear to enter a test address to preview the email.
- c. **Send to File:** saves the generated letter communications as a single file.
 - I. When selected, the File Path field appears. Specify the server file path location to send the file.
- d. **Send to Printer:** sends letter communications directly to the printer.
 - I. When selected, the Destination Printer field appears to enter a printer path.
- e. **Create Envelopes/Labels:** prints envelopes or labels for the communication.
 - I. When selected, the **Report Name** link appears. You must select the report definition for the Communication Generation process to use.

 **Note:** If **Preview Online** or **Send to Printer** is not selected, the communication is generated as soon as the process runs. If the communication is an email, the process sends the email to the specified IDs.

19. **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.

20. Select the **Email Parameters** tab.

Communication Generation

Selection Parameters | **Process Parameters** | Email Parameters | Checklist Parameters

Run Control ID: WA220_COMMGEN_GEN | Report Manager | Process Monitor | **Run**

Usage Tables

Person Communication Usage

Address: Student Email
 Address Name: First Name Only-Pri, Prf
 Salutation: Full Name-Pri,Prf,Leg
 Extra Name: Full Name-Pri,Prf,Leg
☐ Use Preferred Email Address

Joint Salutation Usage

Joint Name:

Org Communication Usage

Org Recipient: All Cntc, All Dept, All Loc
 Contact Name: Full Name-Pri,Prf,Leg

Communication Processing Dates

Communication Date Range Selection

*From Date: 06/20/2022
 *To Date: 06/20/2022

Update Communication Generation Date With

☐ Communication Date
☒ System Date
☐ User Supplied Date

Update Communication Completed Date With

☐ Communication Date
☒ System Date
☐ User Supplied Date

Output Settings

*Sort Option: Country, Postal

☐ Online Preview
☐ Send to Printer
☐ Send to File
☐ Create Envelopes
☐ Create Labels

Missing Critical Data

☒ Produce Communication ☒ Complete Communication

Save **Notify** **Add** **Update/Display**

21. The **Email Parameters** tab displays.
22. They are only used when the communication method selected on the Selection Parameters tab is Email.
 - 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 selects these Reply, 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.

23. Select the **Checklist Parameters** tab.

The screenshot shows the 'Communication Generation' window with the 'Email Parameters' tab selected. The window has a top bar with 'User Defaults 1' and 'Communication Generation'. Below the top bar are four tabs: 'Selection Parameters', 'Process Parameters', 'Email Parameters' (selected), and 'Checklist Parameters'. The main area contains a 'Run Control ID' field with the value 'WA220_COMMGEN_GEN', a 'Report Manager' link, a 'Process Monitor' link, and a 'Run' button. The 'Email Parameters' section includes fields for 'From', 'Subject' (containing 'Welcome to Tacoma Community College!'), 'Reply to', 'Sender', and 'Bounce to'. There are also two group boxes: 'Importance' with radio buttons for 'low', 'normal' (selected), and 'high'; and 'Sensitivity' with radio buttons for 'normal' (selected), 'personal', 'private', and 'company-confidential'. At the bottom are 'Save', 'Notify', 'Add', and 'Update/Display' buttons, and a breadcrumb trail: 'Selection Parameters | Process Parameters | Email Parameters | Checklist Parameters'.

24. The **Checklist Parameters** tab displays.

25. Only used when checklist items are being 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.

26. Select **Run**. Please refer to the [Process Scheduling](#) QRG for instructions.

Communication Generation

User Defaults 1

Selection Parameters | Process Parameters | Email Parameters | **Checklist Parameters**

Run Control ID: WA220_COMMGEN_GEN | Report Manager | Process Monitor | **Run**

Checklist Item Selection

*Administrative Function | ADMA | Admissions Application | ☐ Respect Variable Data

Checklist Context

☒ Checklist Type | ☐ Tracking Group | ☐ Checklist Code

Checklist Type

Checklist Type		
Requirements List	+	-

Checklist Item Status

Item Status		
Active	+	-

Save | Notify | Add | Update/Display

Selection Parameters | Process Parameters | Email Parameters | Checklist Parameters

💡 If the Run Status for the Communication Generation process is **Error**, review the log file to determine cause of errors. Once the error has been resolved, users **DO NOT** need to re-assign communications with the 3C Engine process. Users will want to run the Reset Communications process to clear the errors from the Process Instance and re-run the Communication Generation process to send the communications

[Communications-Using the Reset Communications](#)

- Individual communications can be viewed on the Communication Management page. It will display as shown in the image below except with the parameters and dates specified based on what was entered in the steps above.

Navigation: NavBar > Navigator > Campus Community > Communications > Person Communications > Communication Management

- [View a Generated Communication for an Individual Student.](#)

Process List Communication Management

ID 7

Communication Assignment

Assign DateTime: 06/14/2016 9:23:00AM

*Function: ADMA Admissions Application Variable Data

*Institution: Tacoma CC

Communication Key

*Category: ATCCC Admissions Comm Category

*Context: ATCA41 Gen Admin Comm Context

*Method: E Email

*Direction: Outgoing Communication

Letter Code: A41 General Admissions Admit Enclosures

☐ Include Enclosures

Communication Process Details

Communication Date: 06/14/2016 Begin Time: End Time:

Comments:

☐ Print Comment

Communication ID: Department:

☐ Create Joint Communications

Checklist Association

Sequence
Item Sequence

Communication Outcome

Communication Generation Date: 06/15/2016

☒ Communication Completed Date Activity Completed: 06/15/2016

☐ Unsuccessful Outcome Outcome Reason:

Language Used: English

Method Used: E-Mail View Generated Communication

Process Used: Communication Generation Process Instance: 5845884

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

i It is recommended that after running the Communication Generation process that users run the query CTC_COMMUNICATION_LIST_BY_DATE to verify communication completion and any unsuccessful communications.

CTC_COMMUNICATION_LIST_BY_DATE - List of Comms by Date

Institution: WA220

From Comm Date: 01/01/1901 To Comm Date: 01/14/2019

Letter: A21

View Results

Institution	ID	Last	First Name	Letter	Descr	Unsuccess	Outcome Reason	Comm Date	Dir Compl
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29. Process complete.