

Person Communication Generation Steps

Purpose: The purpose of this document is to create, assign, and send communications.

Audience: Campus Community

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

- **ZC CC 3Cs Config**
- **ZD CC 3Cs Config**
- **ZZ CC 3Cs Config**
- **ZZ CC Standard Letter Tbl**

Users must have college-specific security roles in order to access [Report Definitions](#). Users without these security roles will not be able to search for or edit college Report Definitions. Replace ### with your college's three digit institution code:

- For edit access to all Report Definitions associated with the college: **ZZ Rpt Category ### ALL**
- For edit access to Admissions templates: **ZZ Rpt Category ### AD**
- For edit access to Financial Aid templates: **ZZ Rpt Category ### FA**
- For edit access to Student Financials templates: **ZZ Rpt Category ### SF**
- For edit access to Student Records templates: **ZZ Rpt Category ### SR**


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

Design Helper (BI Publisher Desktop)

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

- **ZZ_DS_BI_PUB_SETUP**


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

-  The Communication Data Source is an **XML file** produced in PeopleSoft that contains all the data fields you want to merge into your letter. **BI Publisher Word Plug-in** connects communication templates and data source files to generate letters or emails for the Communication Generation process.

1. You must download and install **BI Publisher Design Helper to update a letter template in Microsoft Word**. Visit QRG [Download Design Helper \(BI Publisher Desktop\)](#) for details.

Administrative Function

Navigation: Setup SACR > Common Definitions > Administrative Function Table

-  Administrative functions associate 3C communications, checklists, and comments with something in ctcLink. The administrative function's **Variable Data** identifies that something. The Administrative Functions, except the General Administrative Function (GEN), include a unique set of variable data, enabling you to filter the data.

Example:

- **GEN** - only an EMPLID
- **STRM** – Career and Term data
- **ADMA** – Career, Career Nbr, Application Nbr


1. Select an **Administrative Function**. Admin Functions are delivered; please do not change them.
2. Visit QRG [3C Communications: Administrative Functions](#) for details.
3. Below is a PDF of the administrative functions in ctcLink and their associated variable data fields. Every administrative function uses EMPLID as variable data.
4. Example:
 - a. If you want to send one letter per year, use the **GEN** administrative function.
 - b. If you want to send one letter per term, use the **STRM** administrative function.



[Administrative_Functions_and_Bind_Records-1.pdf](#)

Letter Code

Navigation: Campus Community > Communications > Set Up Communications > Standard Letter Table CS

 Report Definitions are tied to Letter Codes in the **Standard Letter** table. **Letter Codes** and **Report Definitions** are created by the CS Customer Support Team. Please include the Datasource, Administrative Function, and letter templates in **.rtf** format when submitting a ticket. Template file names must be shorter than 65 characters in length. Without an RTF template, CS Core can upload a blank template as a placeholder.

If you do not provide information for any other field, we will use our best judgment. Once created, colleges can view and update the template (*on the template tab of the report definition page*).

1. Look up your college codes in the [3C Configuration - Campus Solutions 3Cs and Message Center Naming Conventions](#) QRG.
2. **Also, review the list of departmental codes. One college character** represents a letter code, while other items have two or three characters.
3. Determine whether a standard letter is available. By searching using your college letter, you will be able to see all the standard letters that are configured for your institution. For instance, searching for "_5_" will return all Walla Walla Standard Letter Codes. Since Financial Aid uses different naming conventions, some codes with 5 in the middle may belong to Walla Walla and others belong to a different institution.
4. If you have a standard letter code, verify whether a report definition has been created and attached.
5. A complete communication template includes a **letter code** and **report definition** on the Standard Letters page.
6. The Report Definition page stores the communication template. The **Report Definition** below highlights the Channel - Email, Status - Active, and the Upload button.
7. Please submit a [CS Support ticket](#) if the standard letter code and report definition are missing. if you don't provide an RTF template CS core can use a blank template initially

Standard Letters

< Standard Letter Table

Standard Letters

Standard Letters

Letter Code R52

*Description FERPA Annual Notification

Short Description FERPA

Set Letter Code Walla Walla Community College

Processing Letter Details

*Function Student Term

Applicable to ☒ Persons ☐ Organization

*Letter Type Softcopy

*Letter Printed Data Name/Address Only

SQC Name

☐ Joint Communications Allowed

☐ Include Enclosures

☒ Define Comm Gen Parameters

Template Selection

Report Name CTC SR WW R52 FERPA Annual Notification

Data Source ID CTC_SR_STRM_DATASOURCE

Template List

Personalize Find

First 1 of 1 Last

Template ID	Description	Language	Method	Default Template
CTCSR_WW_R52_1		English	E-Mail	<input checked="" type="checkbox"/>

Report Definition

Navigation: Reporting Tools > BI Publisher > Create BIP Report Definitions

6. **Effective Date:** Defaults to today's date. Use the Effective Date of 01/01/1901 when adding a new value.
7. **Status:** Defaults to **Active**.
8. **Description:** Enter a description (e.g., FERPA Annual Notification, Gen Admin Comm, Enroll Cancel Comm, etc.).
9. **Short Desc:** Enter a brief description (e.g., GA Cntxt, FERPA).
10. **Method:** A communication context can have multiple methods. For example, you might select Email and Message Center.
11. **Direction:** Incoming or Outgoing
12. **Letter Code:** Enter or look up the Letter Code.
13. Click **Save** in the lower-left corner of the page.

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 Context - No Audio](#). This link will open in a new tab/window.

Communication Category Table

Navigation: Campus Community > Communications > Set Up Communications > Communication Category Table

-  Communications Categories encompass a variety of Contexts that indicate communication purposes. For example, you might create an Admissions Communication Category that includes the following communication contexts: Gen Admin Comm Context, RS Admin Comm Context, Intl Admin Comm Context, etc. Don't create a new Category for every Context; there can be more than one Context per Category. Also, communication from different administrative functions can be included in the same category.

1. The **Communication Category Table** search page displays.
2. The page defaults to **Find an Existing Value**. Select **Search** to view existing values.
3. Click the **Add a New Value** tab to create a new Communication Category.
4. Enter a new Communication Category containing a value of at least six characters and following the naming convention outlined in the QRG [3C Configuration - Campus Solutions 3Cs and Message Center Naming Conventions](#).
5. **Effective Date**: Defaults to today's date. Use the Effective Date of 01/01/1901 when adding a new value.
6. **Description**: Enter a description for your chosen Administrative Function (e.g., Walla Walla Student Term Category).
7. **Short Description**: Enter a brief description (e.g., WA200 Term).
8. **Function**: Select from the drop-down (e.g., STRM).
9. **Context**: Enter or look up the Context. The available [Contexts](#) are defined on the Communication Context page.
10. Click the **Add** button to include additional Contexts in this Communication Category.

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Communication 3C Group

Navigation: **Campus Community > Communications > Set up Communications > Communication 3C Groups**

 3C Groups define groups of users with similar needs and interests. You can then associate one or more 3C Groups with a communication category. Using the Communications 3C Groups Security page, users may be granted Update or Inquiry security rights.

By associating a user ID with a specific 3C group, the user can access specific **Communication Categories**, Checklist Codes, and Comment Categories. The users with access to VIEW a message in 3Cs can SEND messages from all departments/ subjects configured in that 3Cs group.

Communication 3C Groups
Communication 3C Groups

Communication 3C Groups

Institution WA200 Walla Walla Community College
Category RWWST Walla Walla Student Term Categ
Function Student Term

Update/Inquiry Group

*Group	Description	
STRM	Student Term	
SREC	Student Records	

Add

Save
Return to Search
Previous in List
Next in List
Notify

Communication Speed Key Table

Navigation: Campus Community > Communications > Set Up Communications > Communication Speed Key Table

Setup Prerequisites:

- The standard letter must be configured to use the selected **administrative function**.
 - CS Customer Support Team creates Letter Codes and Report Definitions.**
Please include the Datasource, Administrative Function, and letter templates in .rtf format when submitting a ticket. Template file names must be shorter than 65 characters in length.
- Colleges create and define a communication **Context**.
 - The communication context links the method of communication to incoming or outgoing and a specified letter code (if applicable). Multiple methods can be connected to one context code.
- Colleges define a **Category** of communication contexts to indicate why communication was sent or received.

4. Colleges assign one or more Categories to a **3C Group** limiting access to the communication associated with the Categories.

Related QRGs:

- [9.2 Setting Up User Defaults for Communications](#)
- [9.2 Communications - Adding Communication to an Individual Student](#)

Note: Setting up communication speed keys must only occur once for each required communication.

1. The **Communication Speed Key Table** search criteria page displays.
2. The page defaults to **Find an Existing Value**. Select **Search** to view existing values.
3. Select the **Add a New Value** tab to define a new Communication Speed Key.
4. Enter or look up the **Academic Institution**.
5. Enter or look up the appropriate **Administrative Function**. 3C communications, checklists, and comments are associated with "something" in ctcLink by [administrative functions](#). That something is identified by the administrative function's unique set of variable data. Knowing **who** needs to be assigned the 3C item, **when** it needs to be given to them, and (for communications and checklists) **how often it should be reassigned** can assist users in identifying which administrative function to use.
6. Click the **Add** button below the Administrative Function.

Communication Speed Keys Page

1. The **Communication Speed Keys** page displays.
2. The **Comm Key Detail** section displays information regarding existing Communication Keys associated with the selected Administrative Function.
3. Add a new row by selecting the **plus icon [+]** in the top-right corner of the Comm Key Detail section.
4. Define a **Communication Key** following the naming convention outlined in the QRG [3C Configuration - Campus Solutions 3Cs and Message Center Naming Conventions](#).
5. Enter a Communication Key **Description**.
6. Enter or look up the **Category**. Categories enable you to group communications for similar purposes.
7. Enter or look up the **Context**. In a communication context, the type of communication is matched with the letter codes intended for use in incoming or outgoing communications, if applicable.
8. No value is required for the **Duration** field.
9. Enter or look up the **Method**. The Context determines the options for Method, Direction, and Letter Code.
10. Enter or look up the **Direction**.
11. Enter or look up the **Letter Code**.

12. Enter a **Comment** to communicate further and identify or describe information associated with this speed key. (Optional)


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Optional Selections

 To use the Print Comment, Activity Completed, and Unsuccessful Outcome features, you must ensure they are selected on the [User Defaults Communication Speed Keys](#) tab.

1. **Print Comment:** Select the checkbox to include/print on the Comments page in the communication connection to the speed key. (Optional)
2. **Activity Completed:** Select to make the status of Completed available. It is useful when the reason for the communication has already occurred. (Optional)
3. **Unsuccessful Outcome:** For example, if you were to hold a booster club fund-raising event, you can 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. (Optional)

Event Definition

Navigation: Campus Community > 3C Engine > Set Up 3C Engine > Event Definition

-  Event Definitions connect processes or field changes in the system to assigning specific 3C functions. It sets up the rules by which the system identifies the communications, [checklists](#), and/or comments that will be added or updated by the 3C Engine process.

1. The **Event Definition** search page displays.
2. The page defaults to **Find an Existing Value**. Select **Search** to view existing values.
3. Select the **Add a New Value** tab to define a new **Event ID**.
4. Create an **Event ID** following the naming convention outlined in the QRG [3C Configuration - Campus Solutions 3Cs and Message Center Naming Conventions](#).
5. Select **Add**.

Event Definition Page

6. Change the **Effective Date** to 01/01/1901.
7. Enter a **Description**.
8. Enter a **Short Description**.
9. Select the appropriate **Function**.
10. Status defaults to **Active**.
11. Enter or look up the **Communication Key**.
12. **Detail** – When you press Tab, **Detail** becomes a link. The link will take you to the **Comm Key Detail** page, where you can view or edit the details of the specified Communication Key. Update any missing elements on the appropriate page if necessary.
13. Select **Save**.

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Events 3C Groups

Navigation: Campus Community > 3C Engine > Set Up 3C Engine > Event 3C Groups

 Comparable to the 3C Communication Group, the **3C Event Group** controls access to the Event ID. Access the Event 3C Groups page to assign security to groups who should have access.

1. Enter or look up the **Group**, or Groups, to associate with the Event ID.
2. Select **Save**.

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3C Engine: Assign Communication


The 3C engine process must be run or scheduled for the 3C item to be assigned to the user unless the item is assigned manually to an individual user. Ensure that your 3C Engine process has plenty of time to run to completion before your Communication Generation process starts running. If you're running your processes on recurrence, schedule your 3C Engine process to begin at least 30 minutes before your Communication Generation process.

You should always **test your communications in PCD** before doing anything in Production, but you might want to test your communication in Production as well with a test EMPLID to make sure it looks perfect before sending it to a real student. This is very easy to do! Assign your communication; then, on the Communication Generation page, select the **Online Preview function** and enter your email address.

When you run the Communication Generation process, you'll receive a test email that will look exactly like what the student will receive. You can do this with up to 10 students at a time. This is a great way to check on how your final email will look. Just make sure to uncheck Online Preview to be able to send the email for real!

1. Create 3C engine run control. Visit the QRG **[Communications - Running 3C Engine to Assign Communications](#)**.
2. The Run 3C Engine process creates the communication record for the selected population of students and defines the following:
 - a. How do you assign the 3C
 - b. Which event?
 - c. If PS Query, which one?
 - d. Allows you to manage duplicates.

Communication Generation: Send Communication

 Communication must be assigned before you can set up the **Communication Generation** process. Thoroughly test the 3C Engine process and CommGen processes in PCD:

1. Test the **3C Engine** and **CommGen** processes in PCD.
2. Make sure queries pick up the correct students. Additionally, selecting "All Person IDs" will pull up every student with the assigned letter code that needs their communication sent to them.
3. Ensure duplicates are not assigned (unless that is your intention).
4. Make sure Communication Management previews are accurate.
5. It is impossible to send emails outside of PCD; check the **Communication Management page of each student** to ensure that communications are assigned.
6. Recurring communications can automate scheduled tasks, reducing manual effort during anticipated events. For details, visit QRG **[Set Up Recurrences for Jobs](#)**.