STATE OF NORTH DAKOTA

CAMPUS COMMUNITY
CREATE AND ASSIGN COMMUNICATIONS
TRAINING MANUAL

VERSION 8.0

Disclaimer

Written by MAXIMUS-*ERP Solutions Group*, May 2004.

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CREATE AND ASSIGN COMMUNICATIONS

OVERVIEW

You can enter and track comments about individuals and organizations.

You can review all comments about an individual or organization.

You can search for a summary of communications for an individual to determine if a specific communication was sent, if it included enclosures, and if it was a joint communication.

You can review the 3C groups that have security access to categories of communications.

You can indicate whether the communication is a phone conversation, a letter, or an in person meeting with an individual. If the communications is a letter, you can manage the variable data and enclosures that should be included, and enter comments that you can choose to print or not print in the letter.

Users must have the appropriate security access to assign communications.

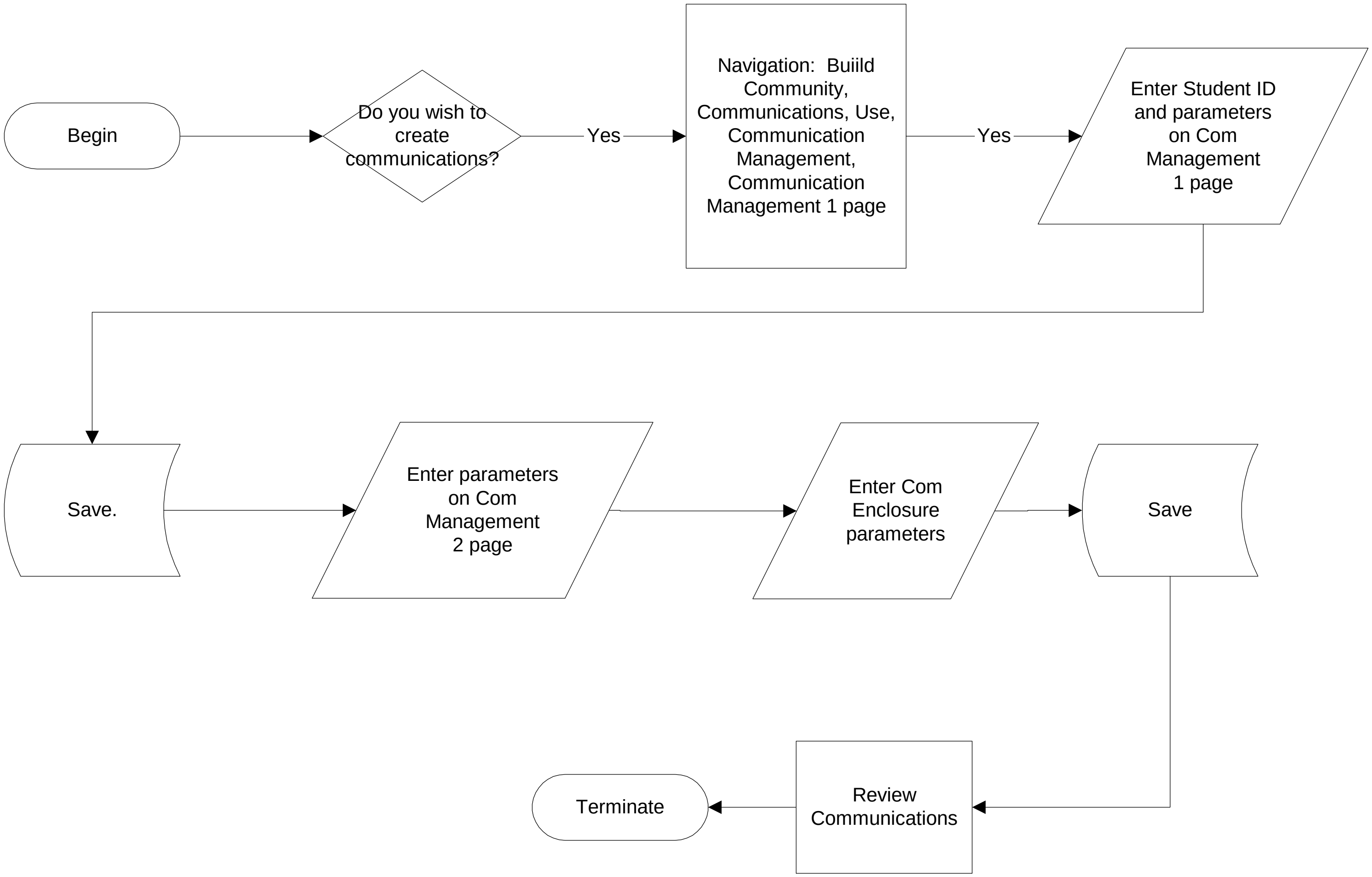
OBJECTIVES

After completing this section, you will be able to:

1. Create and Assign communications for a student.
2. View communications for a student.

CREATE COMMUNICATIONS BUSINESS PROCESS FLOW

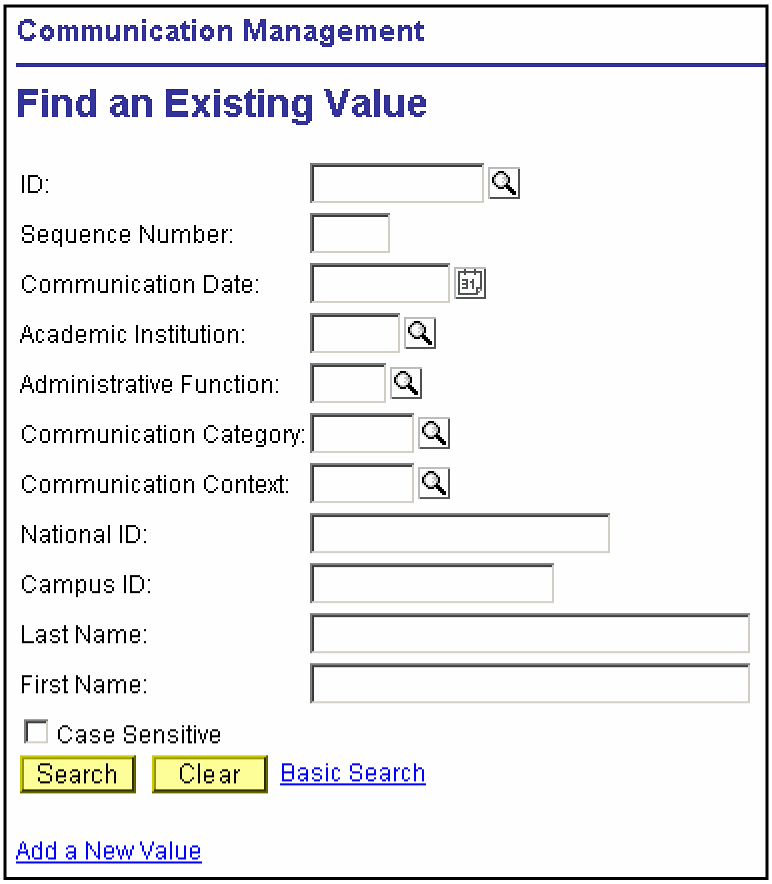
This business process creates communications for a student.



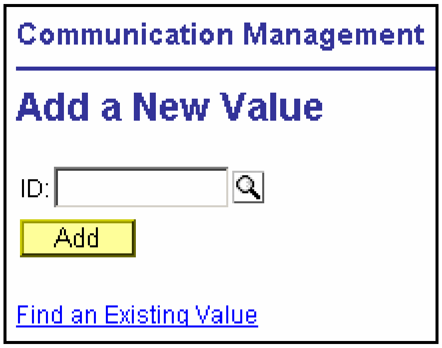
WALKTHROUGH – CREATE COMMUNICATIONS

CREATE COMMUNICATIONS FOR A STUDENT

1. **Navigation**: Home > Build Community > Communications > Use > Communications Management
2. The **Communication Management, Find an Existing Value** page is displayed.



3. **Find an Existing Value**
   a. Enter existing values or select values from the lookup tables.
   b. Click Search.
   c. A list of values that meet your search criteria will be displayed.
   d. Click on the ID that you wish to process.
4. **OR** select Add a New Value.


Communication Management

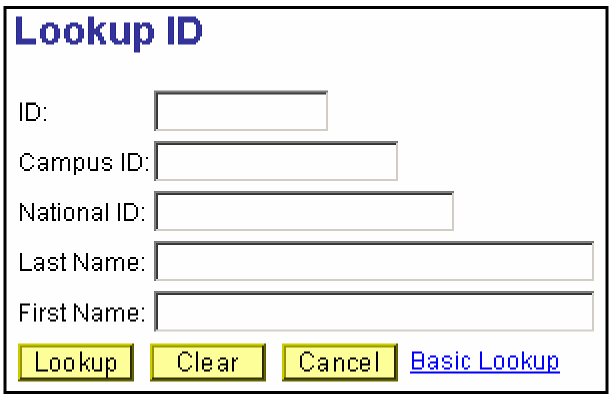
Add a New Value

ID:

Add

Find an Existing Value

5. Enter the **ID** or click to lookup and existing ID.


Lookup ID

ID:

Campus ID:

National ID:

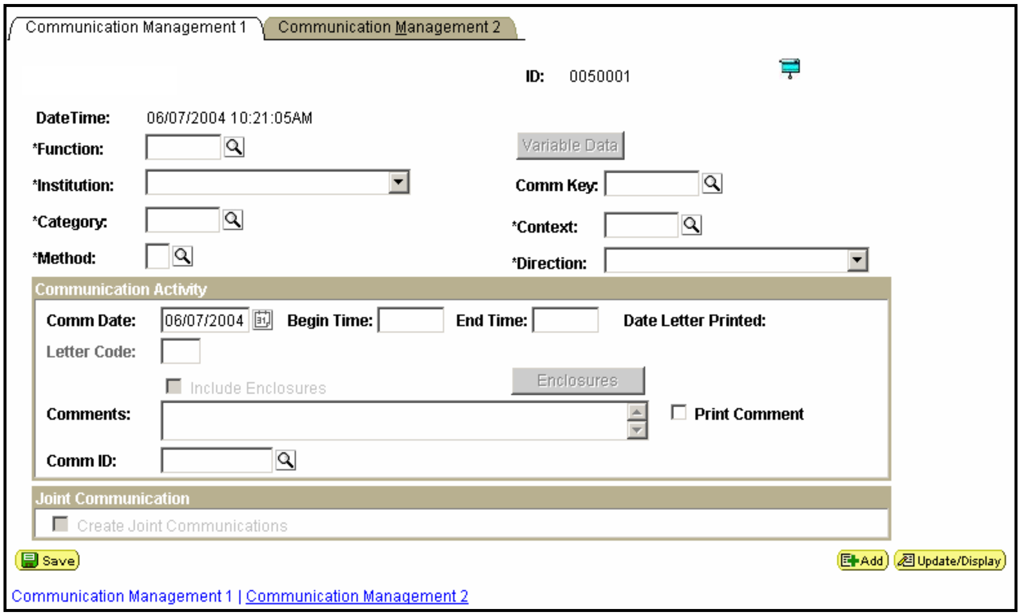
Last Name:

First Name:

Lookup Clear Cancel Basic Lookup

6. Enter the **ID** or values that are used for the lookup. At a minimum, you can enter a partial last name.
7. Click Lookup. A list of values that meet your search criteria will be displayed.
8. Click on the student you wish to view.

9. The **Communication Management 1** page is displayed.



Assigning a Communication to a Student

Communications Management 1

1. On the **Communications Management 1** page enter data in the following fields:
2. **Function**: The code, from the Administrative Functions page, for the functional area that includes this communication.
    a. **Institution**: The institution responsible for this communication.
    b. **Category**: The category, from the Communication Categories page, for this communication.
    c. **Context**: The context, from the Communication Contexts page, for this communication.
    d. **Method**: The method, from the Communication Contexts page, for this communication. Only those methods associated with the specific context are available from the prompt list.
    e. **Direction**: The direction, from the Communication Contexts page, for this communication. Only those directions associated with the specific context are available from the prompt list.

Communication Activity

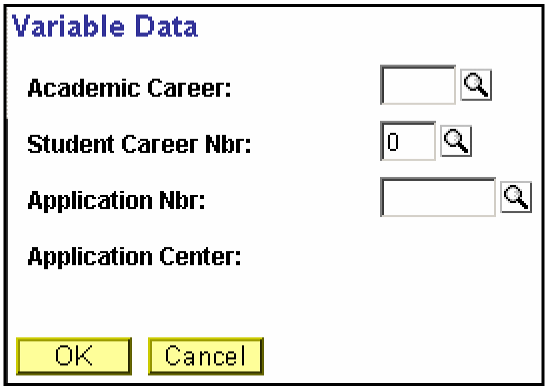
1. Enter data in the following fields:
   a. **Begin Time**: The default begin time is the system time when the communication is entered and saved. You can manually override the begin time.
   b. **End Time**: The system calculates and displays the end time based on the begin time and the duration. You can manually override the end time.
   c. **Letter Code**: The code, from the Standard Letters page, for this communication. The letter codes available are those associated with the context and function selected for this communication.
   d. **Communication ID**: The ID of the staff person who communicated with or is initiating this communication with the individual.

Joint Communication

1. **Create Joint Communications:** Available only if the individual to whom you are assigning the communication has a relationship set to allow joint communications on the Relationships page, and if the letter code is set to allow joint communications on the Standard Letters page.
2. Select to indicate that the communication should be addressed jointly to this individual and the related individual identified on the Relationships page.

Variable Data

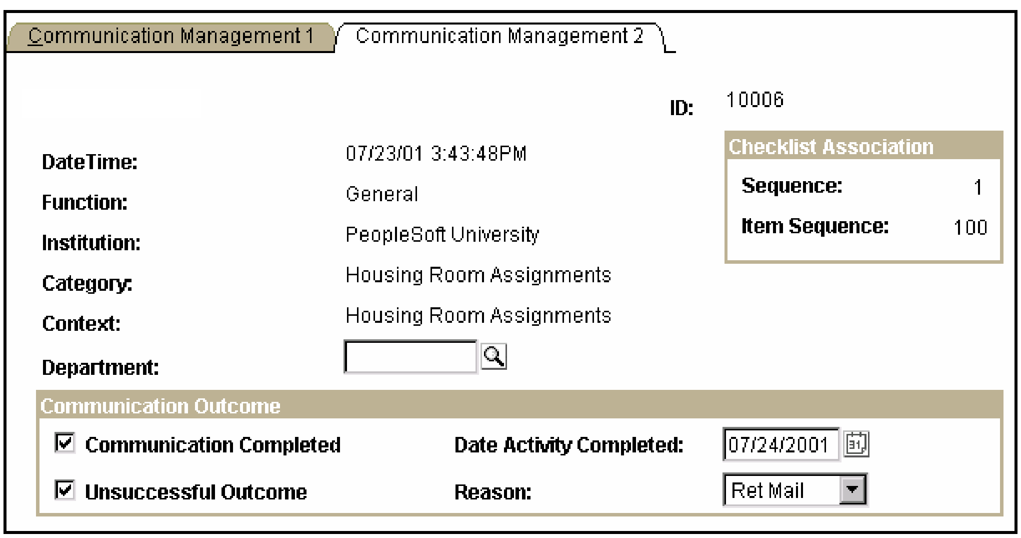
1. Select Variable Data to display the Variable Data page.



2. The fields displayed will vary on this page based on the ID and the Function selected on the Communications Management 1 page.
3. Enter data in the required fields then press **OK** to accept data and return to Communications Management 1 page.
4. Click **SAVE** to commit your changes to the database.

DETERMINING THE COMMUNICATION STATUS OF A STUDENT

1. Select the **Communications Management 2** tab.
2. The **Communications Management 2** page is displayed.



3. On the Communications Management 2 page enter data in the following fields:
   a. **Department**. This is the department within your institution, from the Department Profile page, that is responsible for assigning this communication. This field is optional.

CHECKLIST ASSOCIATION

This group box is displayed only when the communication is created as part of a checklist.

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

COMMUNICATIONS OUTCOME

When you run the letter generation data extract process, the system automatically completes fields and selects check boxes in this group box to indicate the outcome of the communication.

If you do not use the letter generation data extract process, you must complete these fields:

1. **Communication Completed**: When selected indicates that the communication has been successfully completed. For example, the communication is complete if the phone call has been made or if the letter has been sent. In the case of the letter generation data extract process, the communication is complete if the data has been extracted according to the option selected on the run control page.

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

2. **Date Activity Completed**: The default completion date is the date when the Communication Completed option is selected. You can manually override this date.

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

3. **Unsuccessful Outcome**: When selected, indicates that the communication was unsuccessful.

   For example, no one answered the phone, or the letter was returned undeliverable. In the case of the letter generation data extract process, an unsuccessful outcome means that the process was unable to successfully extract all the data for this communication.

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

4. **Reason**: Available when the Unsuccessful Outcome check box is selected. Indicates the reason why the communication was unsuccessful.

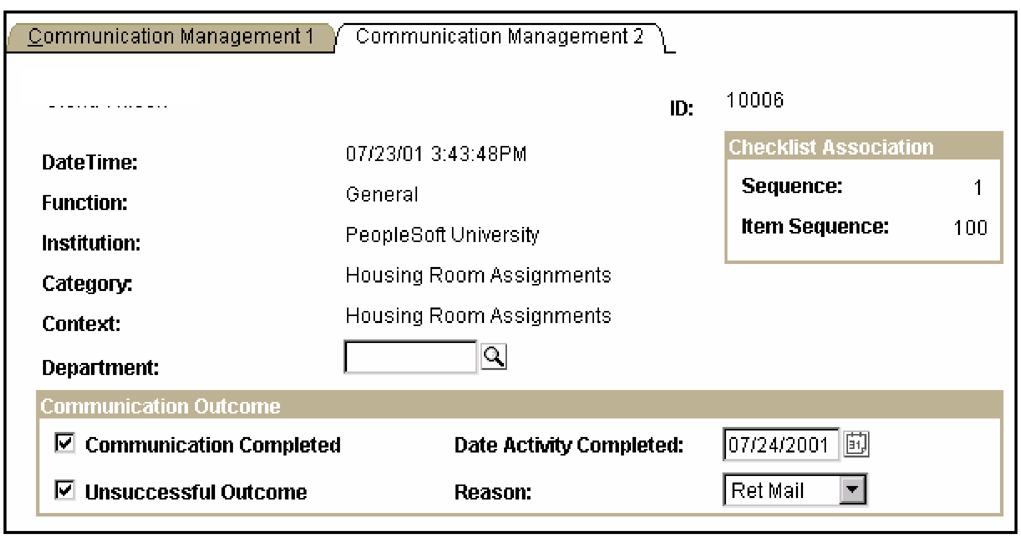
   For example, if a letter that you sent was returned, you might select Returned Mail as the reason that the communication was unsuccessful. In the case of the letter generation data extract process; the system selects Critical to indicate that the absence of critical data prevented the extract process from completing for this communication.

5. Click **SAVE** to commit your changes to the database.

Reset Communication Outcome Panel

In the event the letter generation data extract process was run but you need to run it again (for a printer error or even for testing purposes), you will need to return to the Communication Management pages to reset the **Communication Outcome**.

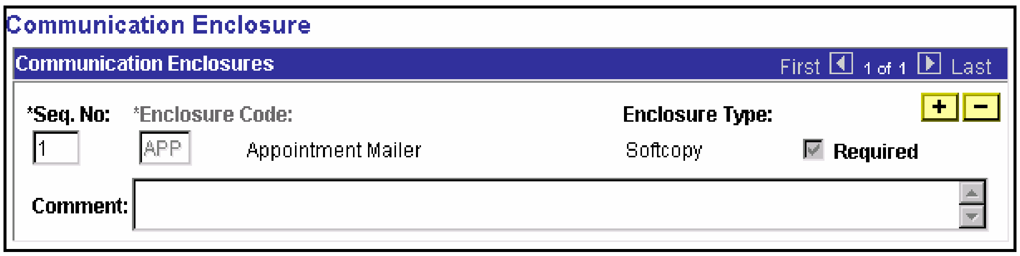
1. **Navigation**: Home > Build Community > Communications > Use > Communications Management
2. Select the **Communications Management 2** tab.
3. The **Communications Management 2** page is displayed.



4. In the **Communication Outcome** section **uncheck** the **Communication Competed** checkbox.
5. The letter generation data extract process can then be executed again to produce the desired result.

Communication Enclosure

1. Click Enclosures on the Communication Management 1 page.
2. The **Communication Enclosure** page is displayed.



This page is used to review, add, or delete enclosures when assigning a communication.

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

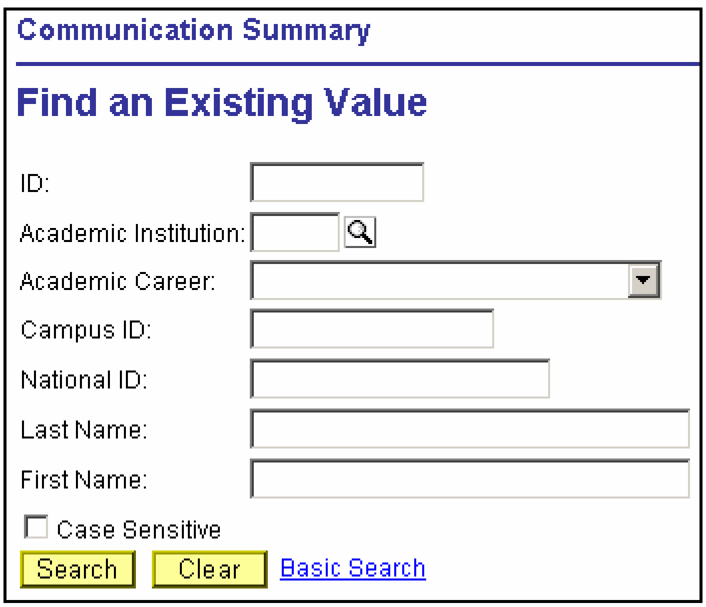
3. **Sequence Number**: The number of this enclosure in the list of enclosures for this communication. When you run the letter generation data extract process, the process lists, in the order identified here, up to ten enclosures on the main letter. The system automatically enters the next sequential number for each enclosure that you add. You can override the numbers manually to reorder the list of enclosures. You can have a maximum of 10 enclosures.
4. **Enclosure Code**: The code for the letter to be included as an enclosure for this communication. The letter codes available are those associated with the same function that you select for the main letter code. If you select the function PROS for the main letter code, the Enclosure Code field prompt list displays the letters codes that exist and are associated with the function ADMA on the Standard Letters page.

5. **Enclosure Type**: The system automatically displays the type of output; hardcopy or softcopy associated with the selected enclosure letter code.
6. **Required**: When selected, indicates that the specific enclosure must accompany this communication at all times.
7. Click **SAVE** to commit your changes to the database.

VIEW COMMUNICATIONS FOR A STUDENT

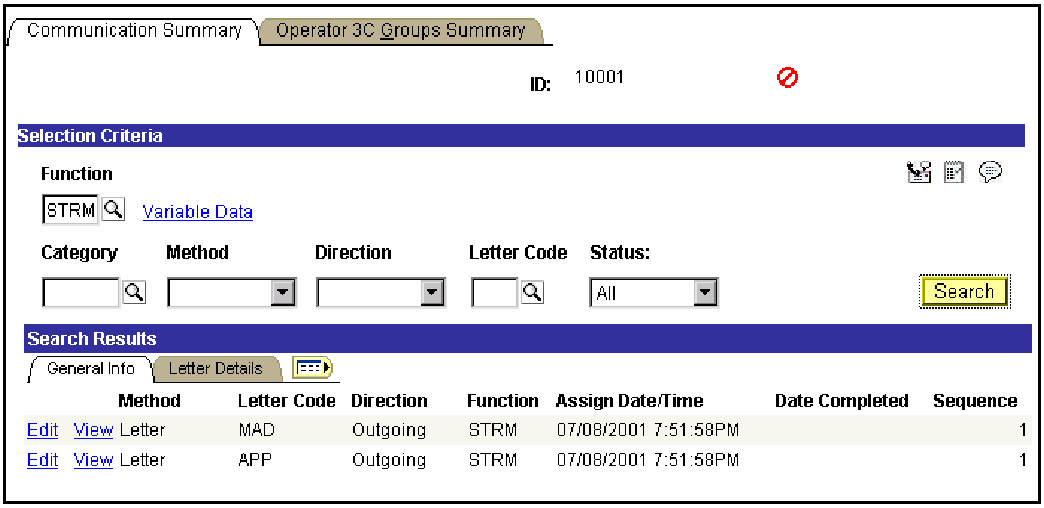
You can enter criteria and search for a summary of communications or view details of the communication assignments.

1. **Navigation**: Home > Build Community > Communications > Inquire > Communications Summary



2. **Find an Existing Value**
   a. Enter values or ID that are used to search. You can choose from first and last name, ID, Campus ID, or National ID (SSN).
   b. Click Search. A list of values that meet your search criteria will be displayed.
   c. Click on the student you wish to view.

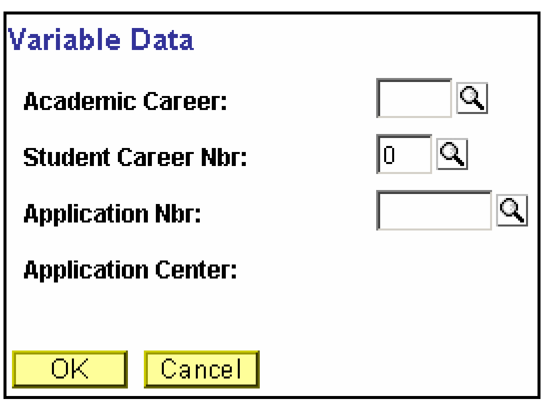
3. The **Communication Summary** page is displayed.



SELECTION CRITERIA

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

1. **Function**: The administrative area on which to search.
2. Click Variable Data to display the Variable Data page. The variable data associated with this Administrative Function for this individual can be viewed on this page. Click **OK** to return to the Communication Summary page.

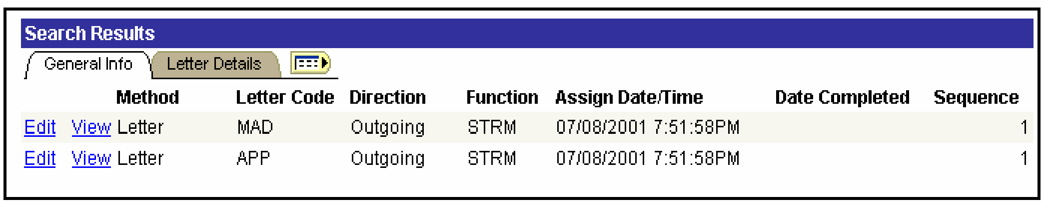


3. **Category**: The category from the communication contexts page for which to search.
4. **Context**: The context from the communication contexts page for which to search.

5. **Method**: The method from the communication contexts page which to search.
6. **Direction**: The direction from the communication contexts page for which to search.
7. **Status**: The status of the communications for which to search.
    a. **All**: The system searches for all communication regardless of status.
    b. **Complete**: The system searches for only completed communications.
    c. **Incomplete**: The system searches for only incomplete communications.
8. Click Search.

SEARCH RESULTS

1. The Search Results are displayed on the bottom half of the screen.



Search Results

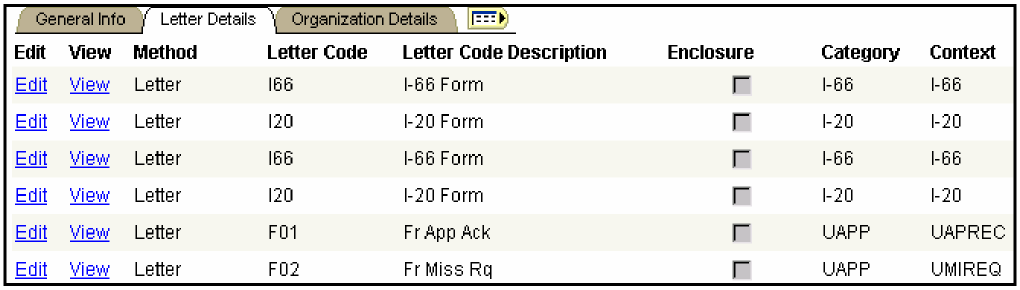
General Info | Letter Details

		Method	Letter Code	Direction	Function	Assign Date/Time	Date Completed	Sequence
Edit	View	Letter	MAD	Outgoing	STRM	07/08/2001 7:51:58PM		1
Edit	View	Letter	APP	Outgoing	STRM	07/08/2001 7:51:58PM		1

2. Use the **General Info** tab to determine information about each primary communication—the method, letter code, direction, function, assign date/time, and date completed.
3. **Edit**. Click this link to access the Communication Management 1 page, where you can edit the communication assignment.
4. **View**. Click this link to access the Communication Management 1 page, where you can view the communication assignment.
5. Click to display additional fields. Those fields are:
    a. Short Description
    b. Enclosure
    c. Joint Communication
    d. Related ID
    e. Category
    f. Context

Letter Details

1. Click the **Letter Details** tab.
2. The **Letter Details** page is displayed.



General Info | Letter Details | Organization Details

Edit	View	Method	Letter Code	Letter Code Description	Enclosure	Category	Context
Edit	View	Letter	I66	I-66 Form		I-66	I-66
Edit	View	Letter	I20	I-20 Form		I-20	I-20
Edit	View	Letter	I66	I-66 Form		I-66	I-66
Edit	View	Letter	I20	I-20 Form		I-20	I-20
Edit	View	Letter	F01	Fr App Ack		UAPP	UAPREC
Edit	View	Letter	F02	Fr Miss Rq		UAPP	UMIREQ

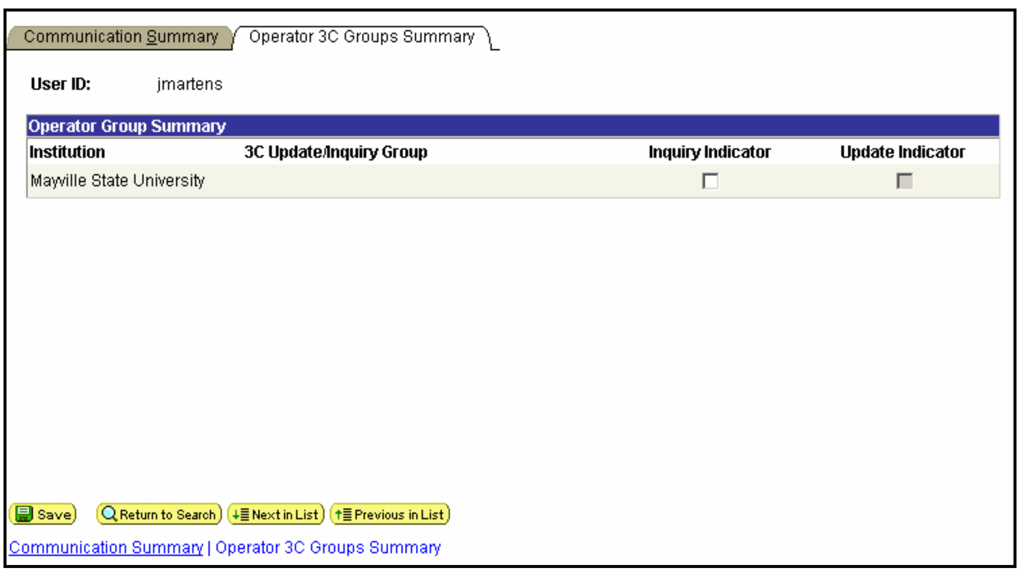
3. Use the Letter Details tab to determine supplemental information about the communication—if there were enclosures, the enclosure letter codes and descriptions; if the communication was joint, the related ID, and context for the communication.

Operator 3C Groups Summary

To view an individual's 3C group inquiry or update access and change the inquiry access if necessary.

Note: Users can access only those communications to which they have been granted 3C group security. With 3C group inquiry access, users can view the communication assignments, but cannot change them. With 3C group update access, users can view and change the communications.

1. Click on the **Operator 3C Groups Summary** tab to view the summary.



Communication Summary | Operator 3C Groups Summary

User ID: jmartens

Operator Group Summary

Institution	3C Update/Inquiry Group	Inquiry Indicator	Update Indicator
Mayville State University			

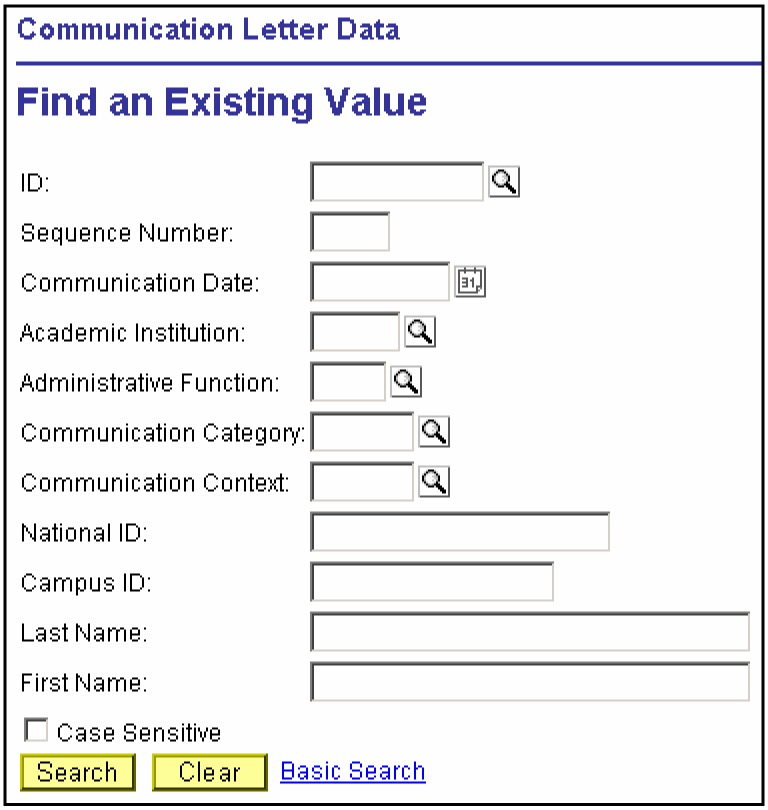
Save | Return to Search | Next in List | Previous in List

Communication Summary | Operator 3C Groups Summary

Communication Letter Data

Use the Communication Letter Data page to view the data extracted for an individual as the result of the letter generation data extract process.

1. **Navigation**: Home > Build Community > Communications > Inquire > Communication Letter Data


Communication Letter Data

Find an Existing Value

ID:

Sequence Number:

Communication Date:

Academic Institution:

Administrative Function:

Communication Category:

Communication Context:

National ID:

Campus ID:

Last Name:

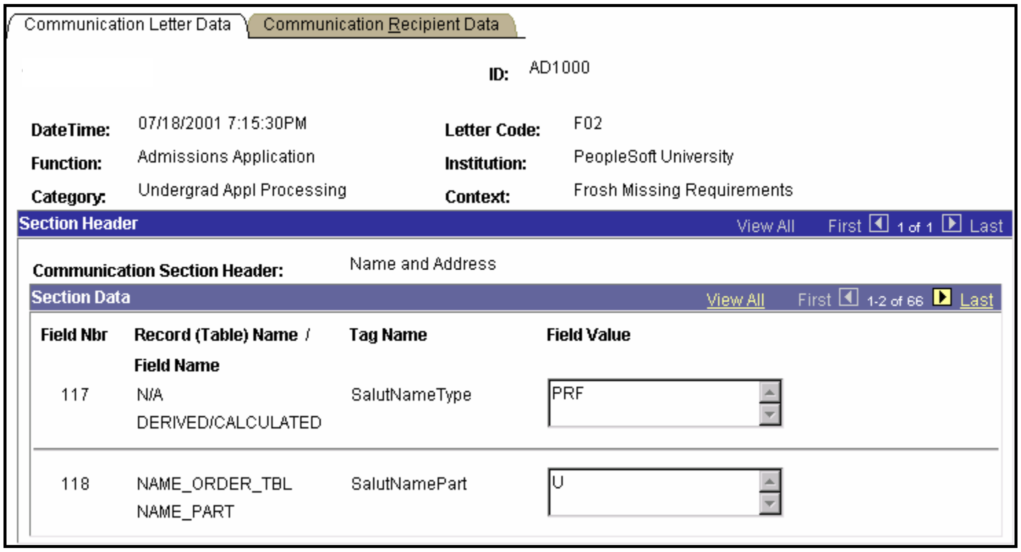
First Name:

Case Sensitive

Search Clear Basic Search

2. **Find an Existing Value**
   a. Enter values or ID that are used to search. You can choose from first and last name, ID, Campus ID, or National ID (SSN).
   b. Click Search. A list of values that meet your search criteria will be displayed.
   c. Click on the student you wish to view.

3. The **Communication Letter Data** page is displayed.



Communication Letter Data | Communication Recipient Data

ID: AD1000

DateTime: 07/18/2001 7:15:30PM
Letter Code: F02
Function: Admissions Application
Institution: PeopleSoft University
Category: Undergrad Appl Processing
Context: Frosh Missing Requirements

Section Header — View All — First 1 of 1 Last

Communication Section Header: Name and Address

Section Data — View All — First 1-2 of 66 Last

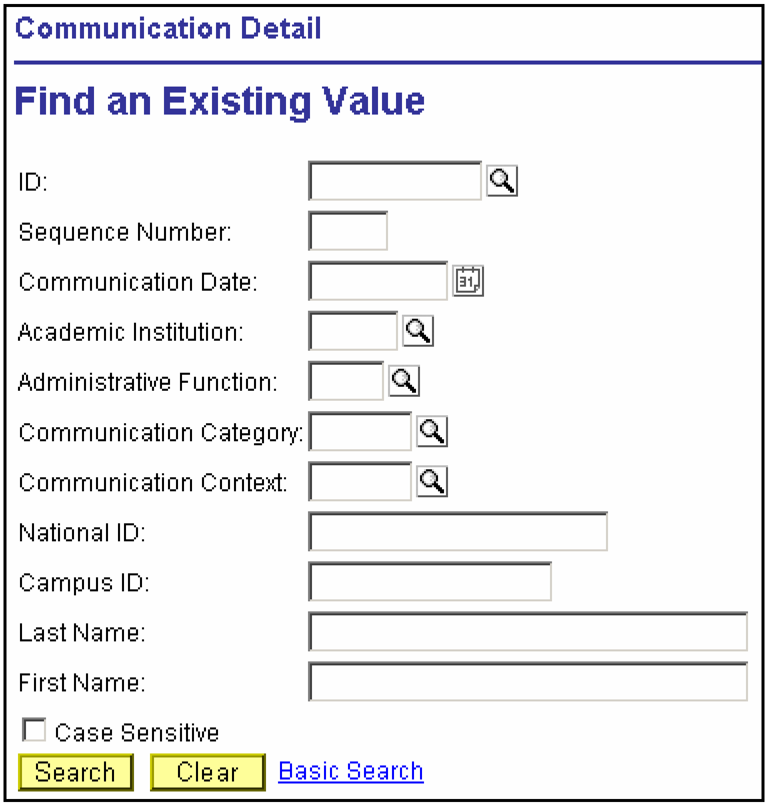
Field Nbr	Record (Table) Name / Field Name	Tag Name	Field Value
117	N/A DERIVED/CALCULATED	SalutNameType	PRF
118	NAME_ORDER_TBL NAME_PART	SalutNamePart	U

4. The Communication Letter Data page is for viewing purposes only. You cannot enter or modify data here. Information on this page is controlled from the Letter Printed Data value set on the Standard Letter Table page.

COMMUNICATION DETAIL

These pages are view only versions of the Communications Management 1 and 2 pages where you assign communications to the individual. You cannot enter or edit data on these detail pages.

1. **Navigation**: Home > Build Community > Communications > Inquire > Communication Detail.


Communication Detail

Find an Existing Value

ID:
Sequence Number:
Communication Date:
Academic Institution:
Administrative Function:
Communication Category:
Communication Context:
National ID:
Campus ID:
Last Name:
First Name:

Case Sensitive

Search Clear Basic Search

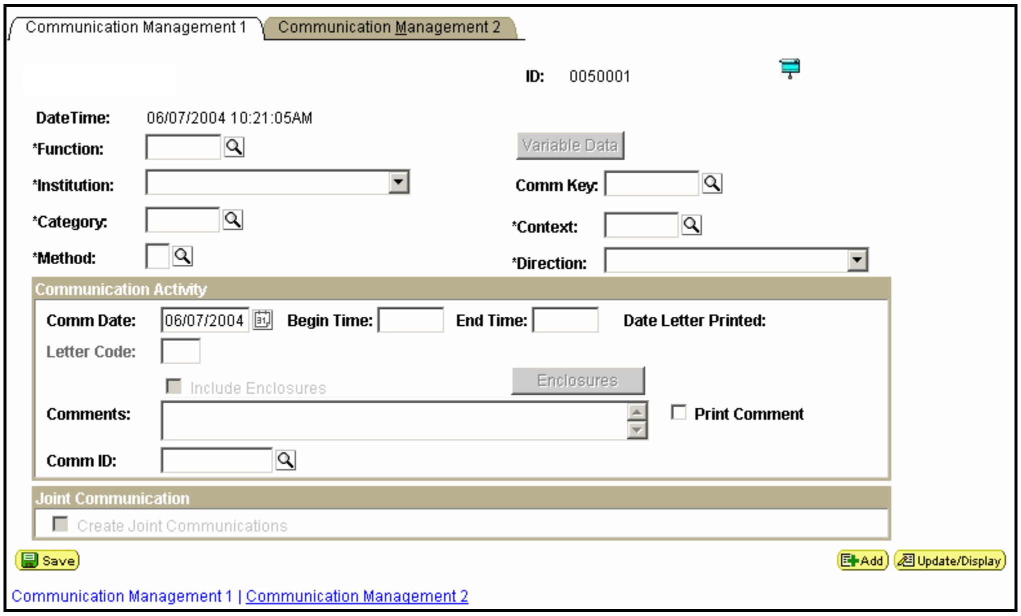
2. **Find an Existing Value**

   a. Enter values or ID that are used to search. You can choose from first and last name, ID, Campus ID, or National ID (SSN).

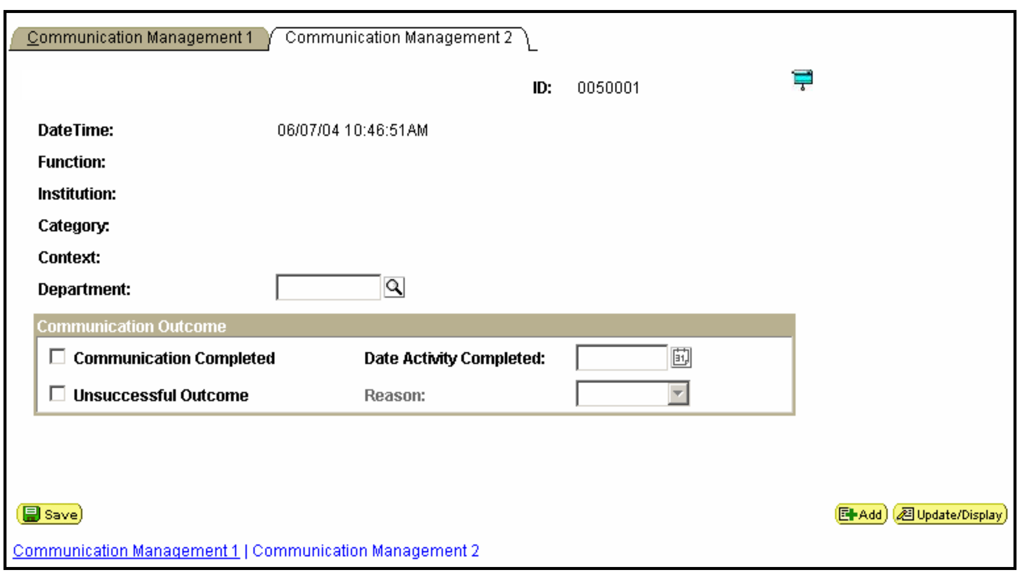
   b. Click Search. A list of values that meet your search criteria will be displayed.

   c. Click on the student you wish to view.

3. The **Communication Management 1** page is displayed for viewing only.



4. Select the **Communications Management 2** tab.
5. The **Communications Management 2** page is displayed for viewing only.



6. Select **OK** to exit.