

Admission Business Process Guide CSU - Channel Islands



Document Information		
Title	Assigning a Communication from the 'Build Community' Menus	
Module	Admission	
Subcategory		
Author		
File Reference		
IDP Session		

REVISION CONTROL

Date	Ву	Action	Pages
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Business Process Overview

The 3Cs—communications, checklists, and comments—are a flexible way to track and analyze correspondence, lists of requirements, and notes about the students, staff, constituents, and organizations in your database.

- Communication management enables you to fully manage all types of contacts inside and outside your institution.
- Checklist management enables you to create lists of requirements and monitor their status.
- Comments creation enables you to attach notable remarks about individuals and organizations.

PeopleSoft uses the term 'Communications' to mean any incoming or outgoing communication with a student. This could be an incoming phone call, an in person visit, or the typical outgoing letter. There are many opportunities to use PeopleSoft to track the different kinds of communications a particular office has with a student. Communications are very flexible and can be adapted in many ways to meet your office needs.

Process Prerequisites/Assumptions

Prerequisite/Assumption	Detail
Search/Match	Search / Match process for the applicant has been performed to verify
	that the applicant is currently in the PeopleSoft system.

Assigning a Communication to a Student

1.0 Manually Assign a Communication

You can access communication assignment in two ways. Either through "Build Community" or "Application Maintenance". Either of these routes takes you through to the same pages and the process is identical.

Navigation

Home > Build Community > Communications > Use > Communication Management

OR

Home > Develop Enrollment > Process Applications > Use > Application Maintenance > Add new communication push button

Page Description

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Consume dass Management - Norweich bierenet Faglerer (1997) 19. 10. 100 - Forders - Tala - Note 19. 10. 100 - 10	Required Fields:
	Administrative Function
A Hume A	Academic Institution
Communication Management 7 Communication Management 2	Variable Data
Date Tase: 05/30/2003 11:08 20044 Taschere: Poter (3) Annual Store Program Variable Data)	Communication Category
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Commonstante Activity CommonState: 55000000 [20] Begin Time: Data Letter PrinzeE	Method
Comments Com	Direction
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Steps for Processing Data

- 1. Navigate to the Communication Management panel.
- 2. Select the Add a New Value Link
- 3. Enter the Empl ID or Search by Last Name
- 4. This will take you to the Communication Entry panel.
- 5. Enter the Administrative Function and Academic Institution.

Entering the Variable Data is a MUST! The required data in this box will vary based on your Admin Function.

- 6. If you have added a Communication Speed Key as a default in your Operator Defaults, this panel will automatically populate after you enter the Admin Function. If this is the correct Communication to add to your student, proceed to Step 14 of this process.
- 7. If a Communication automatically populated in because of your default, but it is not the one you need to enter, tab to the Speed Key field. Delete the Speed Key field and then manually replace the Category, Context, Method and Direction with the correct information. Proceed to Step 17.
- 8. If nothing defaults in after entering the Administrative Function, then a default has not been setup. Your Communication must be added manually. Enter the Category, Context, and Method for the Communication.
- 9. The Current Date will automatically default. This can be changed if necessary.
- 10. Enter the Letter Code if the Method and Direction was an Outgoing Letter.
- 11. Enter any Comments to be associated with this Communication.(this is separate from a 3C Comment)
- 12. Check the Print Comment box if you want comments to print on the letter you are generating.
- 13. The Communication ID for the person entering the communication is automatically assigned this is based on who signed the computer on.
- 14. Click on the Variable Data button. The Variable Data that is requested is determined by the Administrative Function that was selected. Complete the Variable Data. Click **SEARCH**.
- 15. Click on SAVE
- 16. You have now completed the process to add a new Communication to a student. If your communication is an outgoing letter, the next time letters run, your letter will generate. Generating Letters will be covered in a separate document.

If you are going to assign a lot of the same communications in a row, or if you are only responsible for assigning one particular communication, set that communication up as a default in your Operator Defaults and as a Comm Speed Key. This will populate the Communication Management 1 field with the default data automatically.

The navigation is: Go → Design Student Administration → Specify Operator Defaults → Use → Operator Defaults → Communication Speed Keys. Select the Default Speed Key check box for the appropriate Speed Key. Only one default can be set at a time per Administrative Function.