

# **3C's - Comments, Checklists, Communications**

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## Adding/Updating Communications

### **Description**

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Communication Management enables you to track and analyze all of your institution's contacts with students, staff, constituents, and organizations inside and outside the institution. You can track the following:

- All incoming and outgoing communications.
- All types of communication—letters, email, phone calls, personal contact, facsimiles, and so on.
- Communications generated by other offices that affect your office.
- All staff involved with a communication.
- You can assign communications to individuals, organizations, and groups of people.

Use the communication management pages to manually assign communications to individuals or organizations. You can access the communication management pages as described here, or you can access them by clicking the Communication button on pages throughout your system.

You can assign communications to individuals and organizations manually, or you can use the 3C engine to automatically assign communications to individuals based on rules and conditions that you define (see document 3C 004). You can also use mass change to assign communications to individuals (see 3C 005). You can indicate whether the communication is a phone conversation, a letter, or an in-person meeting with the individual. If the communication 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.

### **Process Steps**

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#### **Step 1. Adding a Communication**

##### ***Navigation:***

**Campus Community > Communications > Person Communications > Communication Management**

Follow this navigation to access the Communication Management Search page.

**Step 1.1: Communication Management Search Page**

### Communication Management

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

<b>ID:</b>	begins with	▼	<input type="text" value="0137345"/>	
<b>Sequence Number:</b>	=	▼	<input type="text"/>	
<b>Communication Date:</b>	=	▼	<input type="text"/>	
<b>Academic Institution:</b>	begins with	▼	<input type="text"/>	
<b>Administrative Function:</b>	begins with	▼	<input type="text"/>	
<b>Communication Category:</b>	begins with	▼	<input type="text"/>	
<b>Communication Context:</b>	begins with	▼	<input type="text"/>	
<b>National ID:</b>	begins with	▼	<input type="text"/>	
<b>Campus ID:</b>	begins with	▼	<input type="text"/>	
<b>Last Name:</b>	begins with	▼	<input type="text"/>	
<b>First Name:</b>	begins with	▼	<input type="text"/>	

Case Sensitive

Search
Clear
Basic Search
Save Search Criteria

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

Click the [Add a New Value](#) link to add a communication to the person, Search to locate and view/update existing communications for the person.

### Communication Management

Find an Existing Value
Add a New Value

**ID:**


Add

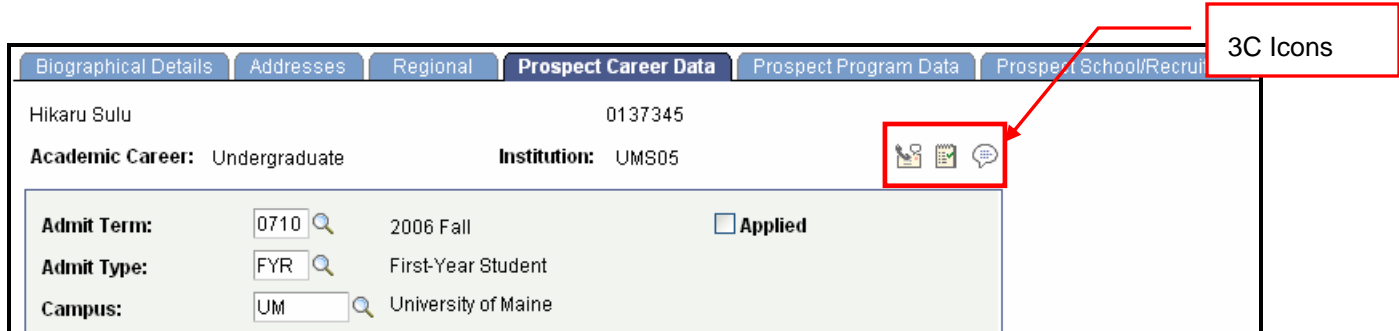
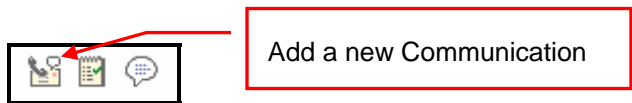
[Find an Existing Value](#) | [Add a New Value](#)

Enter the ID and click Add to access the Communication Management page.

**Alternate Navigation:**

While you are working with the person within either the Prospect Data or Application Maintenance components, click the **Add a New Communication** icon.

Note: Clicking the  (Enter a New Communication) icon opens a new browser “popup” window. If you have some type of popup blocking software activated, you may not see the new windows. Either disable the popup blocker, or allow all popup from this site.

This will open a new window with the Communication Management page displayed for the person. Additionally, an Administrative Function will be defaulted, and Variable Data will be automatically populated. Additionally, if you have a Communication Speedkey set as a default for your operator ID, all of those associated values will be automatically populated.

Page	Admin Function
Application Program Data	ADMP
Application Data	ADMA
Application School/Recruiting	EVNT
Prospect Career Data	PROS
Prospect Program Data	PROP
Prospect School/Recruiting	EVNT

**Step 1.2: The Communication Management 1 Page**

Use this page to assign a communication to an individual.

The screenshot displays the 'Communication Management 1' interface. At the top, it shows the user 'Hikaru Sulu' with ID '0137345'. Below this, various fields are populated: 'DateTime' (02/02/2006 8:46:23AM), 'Function' (PROS - Prospect), 'Institution' (University of Maine), 'Category' (OPROSL - Prospect Adm Office Comm), 'Method' (B - Publicatn), 'Comm Key' (001KEY), 'Context' (001 - UM First Impression Piece), and 'Direction' (Outgoing Communication). A 'Variable Data' button is highlighted. The 'Communication Activity' section includes 'Comm Date' (02/02/2006), 'Letter Code' (001 - First Impression), 'Include Enclosures' checkbox, 'Comments' field, and 'Comm ID' (0030003) with 'Name' (Patterson, Gregory J). A 'Print Comment' checkbox is also present. At the bottom, there are 'Save', 'Notify', 'Add', and 'Update/Display' buttons.

1.2.1 **Function:** The code, from the Administrative Functions page, for the functional area that includes this communication.

1.2.2 **Variable Data** Click to access the Variable Data page, where you can view or enter the required variable data associated with the specified function.

1.2.3 **Institution:** The institution responsible for this communication.

1.2.4 **Comm Key:** The name of the communication speed key that contains the communication category, communication context, method, direction, and letter code, for this communication.

When you select a communication speed key that is valid in your user preferences, the system displays all the values for you. If you do not use a valid communication speed key, you must enter the category, context, method, direction, and letter code values manually. Speed keys for user preferences are maintained on the Communication Speedkeys page.

**> Setup SACR > User Defaults > Communication Speed Keys**

1.2.5 **Category:** The category, from the Communication Categories page, for this communication.

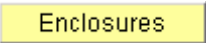
1.2.6 **Context:** The context, from the Communication Contexts page, for this communication.

1.2.6 **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.

1.2.7 **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*


1.2.8 **Communication Date:** The default communication date is the system's current date. You can override this date.

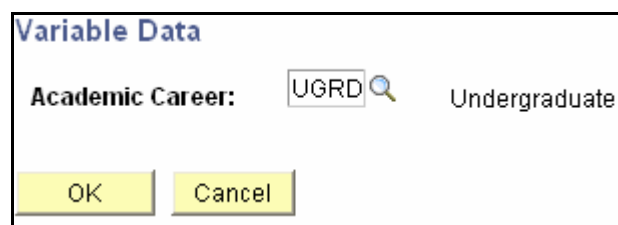
- 1.2.9 **Begin Time:** The default begin time is the system time when the communication is entered and saved. You can manually override the begin time.
- 1.2.10 **End Time** The system calculates and displays the end time based on the begin time and the duration. You can manually override the end time. Begin and End times are typically used for tracking telephone calls.
- 1.2.11 **Date Letter Printed:** The date when the communication, if a letter, was produced by running the letter generation data extract process. This field indicates that letter extract data was successfully completed for this communication.
- 1.2.12 **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.
- 1.2.13 **Include Enclosures** When selected, indicates that this communication includes enclosures. If the selected letter code represents a letter that is set up to include enclosures, the system automatically selects the Include Enclosures check box for you. You can then click the Enclosures button to review, add, or delete the set enclosures.
- If the letter is not set up to include enclosures, you can manually select the check box to include enclosures now, and click the Enclosures button to add the desired enclosures.
- 1.2.14  Available when the Include Enclosures option is selected. Click to access the Communication Enclosure page, where you can review, add or delete enclosures.
- 1.2.15 **Comments:** Comments to further identify or describe the communication for this individual.
- If comments are associated with the communication speed key, the system automatically displays them here. You can change these comments or delete them.
- 1.2.16 **Print Comment** When selected, indicates that the comments should be printed on the communication.
- 1.2.17 **Communication ID:** The ID of the staff person who communicated with or is initiating this communication with the individual.

#### *Joint Communication*

- 1.2.18 **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.
- Select to indicate that the communication should be addressed jointly to this individual and the related individual identified on the Relationships page.

### **Step 1.2.1: Reviewing or Updating Variable Data for an Individual**

Click  to view the Variable Data Page.



Different fields and data appear on this page based on the administrative function selected on the Communication Management 1 page.

**Step 1.2.3: Reviewing or Updating Enclosures for a Communication**

Click **Enclosures** to view the Communication Enclosure page.

The screenshot shows a web interface titled "Communication Enclosure". At the top, there is a navigation bar with "Find", "First", "1 of 1", and "Last". Below this is a table with the following columns: '\*Seq. No:', '\*Enclosure Code:', 'Enclosure Type', and a 'Required' checkbox. The first row contains the values: '1', '007', 'Fall Open House Invitation', 'Softcopy', and an unchecked 'Required' checkbox. Below the table is a 'Comment:' field with a text area and scroll arrows. At the bottom are 'OK' and 'Cancel' buttons.

*Seq. No:	*Enclosure Code:	Enclosure Type	Required
1	007	Fall Open House Invitation Softcopy	<input type="checkbox"/>

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.

1.2.3.1 **Seq No:** 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 ten enclosures.

1.2.3.2 **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. For example, if you select the function ADMA for the main letter code, the Enclosure Code field prompt list displays the letter codes that exist and are associated with the function ADMA on the Standard Letters page. It is useful to include the SFOE, the first position of the letter code, when searching.

1.2.3.3 **Enclosure Type** The system automatically displays the type of output; Hardcopy (preprinted material) or Softcopy (mail/merge letters or labels) associated with the selected enclosure letter code.

1.2.3.4 **Required** When selected, indicates that the specific enclosure must accompany this communication at all times.

**Step 1.3: The Communication Management 2 Page**

Enter or review the status of the communication outcome.

Communication Management 1		Communication Management 2	
Jonathan Archer		ID:	0137343
<b>DateTime:</b>	11/18/05 9:26:13AM	<b>Checklist Association</b>	
<b>Function:</b>	Admissions Program	<b>Sequence:</b>	5
<b>Institution:</b>	University of Maine at Augusta	<b>Item Sequence:</b>	200
<b>Category:</b>	Applicant Communications		
<b>Context:</b>	Applicant Missing Item Ltr 1		
<b>Department:</b>	<input type="text"/>		
<b>Communication Outcome</b>			
<input type="checkbox"/> Communication Completed	<b>Date Activity Completed:</b>	<input type="text"/>	
<input type="checkbox"/> Unsuccessful Outcome	<b>Reason:</b>	<input type="text"/>	

- 1.3.1 **Department:** (Optional) Select the department within your institution, from the Department Profile page, that is responsible for assigning this communication.

#### *Checklist Association*

This group box appears only when the communication was created as part of a communications checklist.

- 1.3.2 **Sequence:** The checklist sequence, from the Checklists page.
- 1.3.3 **Item Sequence:** The checklist item sequence number, from the Checklists page, that created this communication.

#### *Communication 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, such as with phone calls, you must complete these fields.

- 1.3.4 **Communication Completed:** 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.

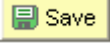
- 1.3.5 **Date Activity Completed:** The default completion date is the date when the communication completed option is selected. You can manually override this date.



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. The letter generation data extract process will update the checklist automatically.

- 1.3.6 **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.

- 1.3.7 **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. The available choices are *Critical, Machine, No Answer, Person, Ret Mail*.

Click  to assign this communication to this person.

If you have accessed these pages by clicking the  (Add a New Communication) icon and opening a new window, then it is recommended that you close this browser window with either File – Close or .

## Source Documents

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Not Applicable

## Security Roles

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Maintained by:

Do not restrict access. Data access is controlled by 3C Group Security.

Viewable by:

APPROVED and TESTED by Admissions and Campus Community February 21, 2006