This is a new edition of the *Using Communications Management* manual, for Release 18 of Colleague. This edition replaces the previous edition dated April 12, 2010.

### The Primary Changes Made

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<td>56</td>
<td>Added information about new subroutine S.UPDT.TRANSCR.COREQ.CC.</td>
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Added information about the new form Communication Management Additional Settings (PASU100) form, which allows you to set system defaults for Communications Management |
| Setting Up Hardcopy Document Options | 85-86 | Added information for new fields on the Hardcopy Document Options (HDCD) form.                                                              |
| Using Mail Merge with Microsoft Word | 101-109 | Added a new chapter, which describes how to use Mail Merge with Microsoft Word.                                                            |
|                                   |       | Removed information about setting up a bookmark document.                                                                                  |
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Using Communications Management

Introduction
About This Manual

Who Should Read This Manual

This manual is intended for managers and staff of the admissions, registrar, financial aid and advancement offices, and anyone else who is responsible for tracking correspondence between an office and its constituents. This manual is also intended for Information Technology staff who will help set up the Communications Management module.

What This Manual Covers

This manual provides instructions for setting up and using Communications Management to handle outgoing and incoming correspondence, document tracks, correspondence request tracks, and correspondence processing.
How This Manual Is Organized

The “Introduction” part, which you are reading now, provides information about this manual and its organization, and an introduction to the Communications Management module and concepts.

The “Getting Started” part provides information about setting up codes and defining parameters for the Communications Management module. Also included are procedures for the following:
- Defining default word processor settings.
- Defining correspondence actions.

The “Outgoing Correspondence” part provides information about defining documents and assigning documents to individuals. Included are procedures for the following:
- Defining document codes.
- Creating documents.
- Assigning a document to an individual.
- Customizing documents.

The “Incoming Correspondence” part provides information about communication codes and incoming correspondence. Included are procedures for the following:
- Defining communication codes.
- Recording incoming correspondence.

The “Document Tracks” part provides information about document tracks. Included are procedures for the following:
- Adding documents to the track.
- Scheduling documents for processing.
- Assigning document tracks.

The “Correspondence Request Tracks” part provides information about defining and assigning correspondence request tracks. Included are procedures for the following:
- Defining correspondence request tracks.
- Assigning correspondence request tracks.
The “Correspondence Processing” part provides information about processing pending correspondence. Included are procedures for the following:

- Batch processing.
- Correcting errors and customizing correspondence.
- Processing correspondence.

The Appendix contains worksheets to assist you in setting up the Communications Management module.
Where to Find More Information

This manual provides task-oriented procedures for using the Communications Management module as part of your daily office activities. Table 1 lists sources of information that provide additional assistance for setting up and using the Communications Management module.

Table 1: Sources of Information for Using the Communications Management Module

<table>
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<th>Type of Information</th>
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<td>Online help</td>
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<td>Instructions for performing basic functions (such as accessing forms, entering data, and accessing online help) using each of the available Colleague interfaces.</td>
<td>Guide to User Interfaces</td>
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<td>In-person instruction for using the Communications Management module.</td>
<td>Training classes offered by Datatel</td>
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<td>Planning your implementation of the Communications Management module.</td>
<td>Getting Started with Colleague Core</td>
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<tr>
<td>Detailed information on each Colleague subroutine, file, field, form, procedure, validation code, list specification, and batch process.</td>
<td>Technical documentation available at <a href="http://clients.datatel.com/support/documentation/techdoc.cfm">http://clients.datatel.com/support/documentation/techdoc.cfm</a></td>
</tr>
<tr>
<td>Known issues.</td>
<td>AnswerNet</td>
</tr>
</tbody>
</table>
About the Communications Management Module

In This Chapter

The Communications Management module is a part of Colleague’s Core application. The Communications Management module improves your institution’s ability to track correspondence, telephone calls, personal visits, and other contacts with individuals or organizations. This chapter provides the following:

- A summary of the features of the Communications Management module.
- A description of the interfaces between the Communications Management module and other Colleague modules.
- Information about accessing the Communications Management module.
Features of the Communications Management Module

The Communications Management module improves your institution’s ability to track correspondence, telephone calls, personal visits, and other contacts with individuals or organizations. With the Communications Management module, you can:

- Manage and coordinate mailings from all areas of your institution.
- Maintain a complete history of correspondence and other contacts with prospects, students, employees, and vendors.
- Automatically alert students enrolled in a specific program when the degree requirements for that program are changed or updated.
- Develop customized correspondence tracks, identifying specified mailing dates, expected return correspondence, and subsequent mailings.
- Monitor the success of mailing campaigns.
- Process large batches of correspondence quickly and easily, with personalized salutations and other variables within letters.
- Track all incoming correspondence, noting received documentation and generating reminders for missing information.
- Organize and control printing on host or PC-based word processors.
- Interface with word processors and list processors.
- Generate mass mailing lists based on data contained in Colleague or from outside sources.
- Maximize your postal budget with bulk mail features.
Interfaces with Other Colleague Modules

The Communications Management module interfaces with many other Colleague modules. Below are examples of what users can do in various Colleague modules through Communications Management.

**Recruitment/Admissions Management**

Correspond with prospects and applicants — send promotional materials, track the receipt of replies, and send and receive application materials.

**Curriculum Management**

Notify students and faculty about course section changes or cancellations.

**Benefit Enrollment Online**

Notify employees of upcoming enrollment periods and deadlines, manage signature requests, and provide other notifications and information.

**Financial Aid**

Manage communications for SAP appeals and award letters.

**Activities and Events**

Exchange invitations, registration materials, confirmations, and other correspondence with event guests.

**Human Resources**

Generate and track COBRA-related correspondence.
Using Registration

Send registration announcements to students and communicate waitlist status and course section availability.

Student Retention Alert

Manage communications with at-risk students.

Residence Life

Inform students of residence room assignments.

Payroll

Inform employees of the availability of online pay advices.

Colleague Advancement

Track solicitations, reminders, and acknowledgments sent to constituents.

IVR Interface

Notify students of documents that are missing from their financial aid file, when the student accesses the information through the IVR Interface.

Datatel Recruiter™

Export Communications Management information to Datatel Recruiter™.

Workflow Management (WfMS) System

Track incoming and outgoing messages for workflows that include communications components.
Accessing Colleague and the Communications Management Module

There are several ways to set up access to Colleague, and the setup at your institution may differ from that at another institution. Because of these differences, Datatel does not provide procedures for accessing Colleague. Your supervisor or system administrator should provide you with your Colleague login ID, password, and step-by-step instructions for accessing the system.

After you have logged in to Colleague, you can access forms in the Communications Management module. See Guide to User Interfaces for information about accessing a form and navigating around a form.

Note: Your system administrator can set up Colleague to restrict access to certain parts of the system for each user. If you find that you cannot access a form that you need to perform your work, see your supervisor or system administrator.
Overview of the Communications Management Module

In This Chapter

This chapter provides an overview of the Communications Management module.

This chapter describes how Datatel University, a fictitious institution in Fairfax, Virginia, uses the Communications Management module to manage its communications between the admissions office and prospects and applicants. The descriptions in this chapter explain how the Communications Management module can be used for many different tasks, but does not fully explain its functionality.

The examples presented in this chapter are based on admissions processes. These examples are for illustrative purposes only. You can use the Communications Management module with any other Colleague module. The term “client” refers to anyone with whom you correspond or from whom you expect correspondence. For example, in Admissions, your clients are prospects and applicants; in Colleague HR, your clients are employees.

Note: The examples in this chapter are intended to provide you with an idea of how you can manage the processes of communicating with prospects and applicants. Datatel University (DU), a traditional four-year institution, is used as the basis for these examples. Because all institutions differ in the way they handle the processes described in this chapter, the examples in this section represent general scenarios that you can customize to your specific needs.
Communications Management Concepts

To understand how Datatel University proceeded with its implementation of the Communications Management module, you must understand some of the basic Communications Management concepts.

Note: The following is a high-level overview of some of the codes in the Communications Management module. Refer to the appropriate chapter of this manual for complete details on the codes describe below.

Documents

All outgoing communications are referred to as documents. There are two types of documents:

- Letters or other written communications that you generate and print.
- “Coded” documents that represent pre-printed communications such as brochures and catalogs that you do not generate.

When you instruct Colleague to send a particular letter, you can also include an instruction to send a specific “coded” document, such as a brochure. You can also have Colleague keep track of each document that it sends to an individual.

See “Defining Document Codes” beginning on page 71 for more information about setting up your document codes.

Document Tracks

A document track is a group of document codes. For example, you might have a document track for prospects, which includes each letter that you send to prospects before you receive their admissions applications. In this track you can define when to send the first piece of correspondence, what makes up that piece of correspondence, and then when to send subsequent or follow-up pieces of correspondence. You can combine document tracks with communication codes to automate a great deal of the communications that you exchange with your clients.
Communication Codes

Communication codes keep track of incoming correspondence and other information that comes into your office from clients. Depending on the level of detail that you want for tracking purposes, you can define a code to represent each individual type of communication or you can use broad categories. For example, you may have one code that represents any reply card or you may have a code for each different reply card that you distribute. In this second case, you would have a code to represent reply cards in magazines (and possibly one code for each different magazine in which you advertise), a different code for your recruitment poster, and yet another code for the reply card included in your viewbook. By being specific with your communications codes, you can gather information that will help you analyze your recruitment efforts.

See “Defining Communication Codes” beginning on page 125 for more information about setting up your communication codes.

Correspondence Request Codes

A correspondence request code groups together related communications codes to form a track of required incoming correspondence. For example, Datatel University has a correspondence request code that combines the pieces needed for a complete application—the application form, the application fee, the transcript, the letters of recommendation, and the test scores. For each applicant, Colleague keeps track of the receipt of each of these items. When all of the items are received, a follow-up action associated with the correspondence request instructs Colleague to update the individual’s application status.

See “Defining Correspondence Request Tracks” beginning on page 153 for more information about setting up your correspondence request codes.
Tracking Rules

Tracking rules let you define when information recorded through another module will trigger an event in the Communications Management module. For example, Datatel University has a rule that updates the communications code for the admissions application when an application date is entered in the Admissions module.
Putting the Pieces Together

To understand the basic relationship between the pieces of the Communications Management module described on the previous pages, consider the following example. You receive information from an individual. You record that information in the Recruitment/Admissions Management module (for example, on the Applicant Summary [ASUM] form). When you save the record, Colleague reads your admissions tracking rules. For each rule that is true, Colleague updates the communications code associated with the rule, changing the status to “received.” The “received” status triggers actions defined in the communications code, such as sending a document or assigning a correspondence request code. If a correspondence request code is assigned, and all items in that request have been received, Colleague might update the individual’s application status.

Figure 1 illustrates this flow.
Introduction: Overview of the Communications Management Module

**Figure 1: Example of the Flow of Information**

1. **Enter information received into the Recruitment/Admissions Management module.**
2. **Colleague updates the applicant’s record.**
3. **Colleague evaluates your Admissions Tracking Rules.**
4. **Colleague updates the applicant’s Correspondence Requests based on the tracking rules.**
5. **When the applicant’s Correspondence Requests are complete, Colleague updates the applicant’s record.**

---

**App Stat = Pending**

0001313

**App Stat = Complete**

0001313

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Linking Information Received with Information Being Sent

This section explains how Datatel University’s admissions office uses the Communications Management module to automate many of its communications with prospects. Communication during the prospect phase of DU’s recruitment cycle begins when the admissions office sends the initial introduction letters. The mailings to prospects who directly contacted the university is coordinated in part through the automation established between the Recruitment/Admissions Management module and the Communications Management module.

The admissions office uses a number of communication codes, documents, document tracks, and correspondence received codes to describe the information the office exchanges with prospects and applicants.

Communication Codes and Document Tracks

The PROS.INQ code is one of the communication codes the office uses. The PROS.INQ code indicates that the office received a prospect inquiry card from an individual. This code instructs Colleague to put the individual on a document track named INQUIRY1 when the admissions office receives the prospect inquiry card. The INQUIRY1 document track generates a welcome letter and a label for the university’s viewbook. Five days after sending the welcome letter, the INQUIRY1 track generates a follow-up letter (Figure 2).
Introduction: Overview of the Communications Management Module

Figure 2: Example of a Communication Code and a Document Track

<table>
<thead>
<tr>
<th>CMC - Communication Codes</th>
<th>TRC - Tracking Codes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code: BUSINQ</td>
<td>Code: INQUIRY1</td>
</tr>
<tr>
<td>Description:  Prospect Inquiry Code</td>
<td>Description: Initial Prospect Inquiry</td>
</tr>
<tr>
<td>Office Code: ADM - Admissions</td>
<td>Office Code: ADM - Admissions</td>
</tr>
<tr>
<td>FA Year: 2008</td>
<td>FA Year: 2008</td>
</tr>
</tbody>
</table>

Linking Admission Tracking and Communications Codes

The admissions office also defined admissions tracking rules to evaluate specific information recorded about an individual and, when the rule is true, to assign a specific communications code. For example, Figure 4 illustrates how DU defines an admission tracking rule and the associated communication and tracking codes. The BUSINQ rule checks the academic programs assigned to an individual. If the individual has a business academic program, the rule is true and Colleague assigns the BUSINQ communications code. The BUSINQ communications code instructs Colleague to place the individual on the BUSINESS document track and remove the individual from the INQUIRY1 document track.
Figure 3: Linking an Admission Tracking Rule to a Communications Code

ATRK - Admissions Tracking Rules

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<thead>
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<th>Rule</th>
<th>Comm Code</th>
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</thead>
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<tr>
<td>1</td>
<td>BUS8Q</td>
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<tr>
<td>2</td>
<td>ADMAPPL</td>
</tr>
<tr>
<td>3</td>
<td>APPROV</td>
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RLDE - Rules Definition

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<th>Created By</th>
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<tr>
<td>ADM Admissions</td>
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<td></td>
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<tr>
<td>APPLICATIONS</td>
<td></td>
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CMC - Communication Codes

<table>
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<th>Code</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>BUS8Q</td>
<td>Business School Inquiry</td>
</tr>
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Immediate Print Documents

| 1 | 2 |

Special Actions

| 1 | 2 |

Correspondence Requests

| 1 | 2 |

Follow up on the following tracks

<table>
<thead>
<tr>
<th>BUSINESS</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>INQUIRY: Initial Prospect Inquiry</td>
<td>2</td>
</tr>
</tbody>
</table>

TRC - Tracking Codes

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BUS8Q</td>
<td>Business School Inquiry</td>
</tr>
</tbody>
</table>

Send the Following Correspondence

<table>
<thead>
<tr>
<th>Document Description</th>
<th>Days</th>
<th>By Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>INTLTR Special Interest Letter</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>BUS8Q Business School Brochure</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>VIEWBK Label for Mailbook</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>BUS8Q Business School Followup</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>BUS8Q Business School Followup</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>BUS8Q Business School Followup</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td>BUS8Q Business School Followup</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>BUS8Q Business School Followup</td>
<td>13</td>
<td></td>
</tr>
<tr>
<td>BUS8Q Business School Followup</td>
<td>14</td>
<td></td>
</tr>
<tr>
<td>BUS8Q Business School Followup</td>
<td>15</td>
<td></td>
</tr>
</tbody>
</table>
Examples Applied to a Prospect

To illustrate how these codes work together, let’s follow the process of adding a prospect, Mary Stuart, after the admissions office received Mary’s prospect inquiry card.

Figure 4: Example of a Prospect Inquiry Card

<table>
<thead>
<tr>
<th>Name: Mary Stuart</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Security Number: 222-99-8765</td>
</tr>
<tr>
<td>Address: 1445 LaVista Road</td>
</tr>
<tr>
<td>City: Decatur</td>
</tr>
<tr>
<td>Telephone No.: (404) 888-3456</td>
</tr>
<tr>
<td>High School: Chamblee-Tucker High School</td>
</tr>
<tr>
<td>Prospective major: Business</td>
</tr>
</tbody>
</table>

I would like the following:

An administrative assistant entered the information from the prospect card through the Recruitment/Admissions module. The first step was to create a new prospect record using the Prospect Summary (PRSP) form. In the Comm Code field, the administrative assistant entered the code for a prospect inquiry card—PROS.INQ. Because Mary indicated an interest in the business program, the administrative assistant recorded that information in the Academic Program Information group on the PRSP form. Figure 5 shows the PRSP form with Mary’s initial prospect information recorded.
After the administrative assistant enters Mary’s prospect information, Colleague evaluates the information, including the admissions tracking rules, and updates Mary’s correspondence information as follows:

- Adds the receipt of the PROS.INQ communications code, which also places Mary on the INQUIRY1 document track.
- Adds the receipt of the BUSINQ communications code, which takes Mary off of the INQUIRY1 document track and adds her to the BUSINESS document track. Figure 6 shows what Mary’s correspondence records look like after Colleague updates all communication management codes.
Figure 6: Example Communications for an Individual

<table>
<thead>
<tr>
<th>IHS - Individual History</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origin</td>
</tr>
<tr>
<td>Documents Sent</td>
</tr>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>3</td>
</tr>
<tr>
<td>Paragraphs</td>
</tr>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>3</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ITR - Individual Tracking</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origin</td>
</tr>
<tr>
<td>Documents Sent</td>
</tr>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>3</td>
</tr>
<tr>
<td>Paragraphs</td>
</tr>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>3</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Communication Codes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
</tr>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
</tbody>
</table>
Linking Information Received with Information Requested

Datatel University’s admissions office uses Colleague to keep track of when an individual sends the information required for a completed admissions application. When an applicant returns an admissions application during the Applicant Phase of the recruitment process, the admissions office focuses on receiving all the required documents from that applicant. Part of the office’s efforts includes sending periodic notices to the applicant that certain information is missing. Because of the volume of information received from all applicants, and because the timing of when the information is received varies for each applicant, the tracking aspects of the Communications Management module help the admissions office manage this phase of the recruitment process.

The admissions office defined a communication code for each item needed for a completed admissions application, as listed below:

- SAT or ACT test scores (SCORES).
- Official transcripts (one for each type of transcript, such as HSTRANS and EXTRANS).
- A letter of recommendation (RECOMMD).
- The application fee (APPFEE).
- A completed admissions application (APP).

In the definition of each communication code is the instruction to Colleague to add an individual to the ADMAPP correspondence request code when that item is received. The ADMAPP correspondence request track identifies all the items needed for a completed admissions application (from the list above). Colleague assigns the ADMAPP correspondence request code to an applicant when the admissions office receives any of the individual items that make up an admissions application.

To let Colleague know when any one of these items is received, the admissions office defined admissions tracking rules for some pieces of information in the application package and associated each rule with the corresponding communication code. For example, the admissions office created a tracking rule named ADMAPPL to use with the application form. This rule evaluates the application date to determine whether the application form was received. If the application date exists for an individual, Colleague assumes that the application form has been received. When the rule evaluates the application date and finds that it exists, it updates the APP communication code in the ADMAPP correspondence request track with a status of “Received” for the individual.
When the individual has been assigned to the ADMAPP correspondence request track, the individual communication codes listed in that track are assigned to that individual. Rather than using rules to automatically update the status of a communication code, the admissions office could manually update the tracks and communication codes assigned to an individual using the Individual Requests (IRQ) and Individual Requests by Track (IRT) forms. For example, if the admissions office received a letter of recommendation for an individual, they could manually record the receipt of the letter by accessing the individual’s list of requested correspondence on the IRT form (available as a detail form from the IRQ form) and changing the status for the RECOMMD communication code to “Received.”

The admissions office can further link pieces of communication to other tracks and actions by defining triggers that take place when a communications code is assigned or received from an individual. For example, when the admissions office receives an application from an individual and the status of the APP communications code is set to “Received,” the individual is automatically assigned to the ADMAPP correspondence request track (if the individual was not already assigned to it). This action also removes the individual from the INQUIRY1 document track (if it was previously assigned) and adds the individual to the APPREC document track (if it was not already assigned).

To complete this process, the ADMAPP correspondence request code includes a follow-up action that Colleague initiates when all the required items in the request code are recorded as received. This follow-up action instructs Colleague, through a special subroutine, to update the applicant’s application status to “Complete.” The admissions office uses the application status code to indicate that all the information for an admissions application has been received and that the admissions representative assigned to the applicant can review the application.
Entering Correspondence Information

Use the Communication Information (COM) form to change the default correspondence information for an individual, including mail name, address, email address, mail rules, and salutation.

**Figure 7: Entering the Correspondence Information**

Use of this form is not required. You can send correspondence to any individual in your system without entering data through the COM form. Any information changed on this form is used as the default for the individual, but can be changed for individual letter request records through the Individual Pending Corres (IPC) form.
Procedure for Creating a Communications Management Process

This section provides some high-level steps to help you set up your Communications Management process for automating many of your communications tasks.

**Step 1.** Map the process.

Use flow charting and other techniques to “map out” the current process of communicating with clients. This process should not focus on any automated systems but should instead identify the general flow of information into and out of your office.

From the flow charts, you should be able to identify the following:

- Information that is sent out of your office.
- Information that is received from clients.
- The action points within the process (for example, when the receipt of a piece of information results in an action taking place).

**Step 2.** Identify the outgoing and incoming communications.

From the flow charts, list each piece of outgoing and incoming communication. Be as specific as you need to accurately manage your processes and to gather information that will help with analyzing your activities (for example, if you identify each individual advertisement instead of using one code for all advertisements, you can track responses to each and then identify which advertisements provided the most inquiries and eventual applicants.)

**Step 3.** Define your codes.

Define the codes for all of your outgoing and incoming communications.

See “Defining Document Codes” beginning on page 71 for more information about setting up your document codes.

See “Defining Communication Codes” beginning on page 125 for more information about setting up your communication codes.
Step 4. Set up groups of documents (outgoing communications) and correspondence requests (incoming communications) to effectively manage the communications processes.

Groups of documents automate processes by putting together a sequence of outgoing documents that Colleague will process automatically. Groups of communication request codes (incoming communications) let you identify what you expect from an individual and associate specific actions upon the receipt of each individual item or the complete group of items.

See “Defining Document Tracks” beginning on page 141 for more information about setting up your document tracks.

See “Defining Correspondence Request Tracks” beginning on page 153 for more information about setting up your correspondence request tracks.

Step 5. Set up the links between the incoming and outgoing communications.

The links between types of communications are the means of automating your processes. These links come in the form of rules, subroutines, and communication “triggers” and “actions.”
Using Communications Management

Getting Started
Communications Management Codes

In This Chapter

This chapter provides an overview of the correspondence and document codes you must create to represent your communications. It also discusses recommended naming conventions you can follow. Procedures for defining these major codes, such as document codes, communication codes, and correspondence request codes, are defined in separate chapters. The procedures for these codes are not included here because they are not simply defined once during implementation. You can create and use new correspondence and document codes at any time.

Descriptions and procedures for defining the Communications Management module’s setup codes are included in this chapter. Other chapters in this part include information on setting up other parameters needed to use the Communications Management module.
Understanding Communications Management Codes

A code is a character or group of characters (alphabetic, numeric, or combined alpha and numeric) used to represent a piece, or pieces, of related information. Codes provide a short cut method for handling data because you can group together many pieces of information under one code and a simple one- or two-character abbreviation may represent a much larger body of information.

Codes are also extremely helpful in standardizing data entry, providing the following advantages:

- establish standard values for certain data elements, thereby ensuring consistent data entry
- increase data entry efficiency and speed
- limit the valid responses a user has for data entry
- simplify data entry by storing several related pieces of information in a single code that can be added to a record in one step
- provide consistent values, and descriptions of those values, on forms and in reports, thereby ensuring more accurate and meaningful reports.
Codes and Office Security

Communications Management codes can be protected so that only users in specific offices can see or use them. For example, if you work in the Admissions office, you can define and use document codes that people in other offices cannot see or use. Likewise, other offices can define and use document codes that Admissions office users cannot see or use.

When creating Communications Management codes—such as document codes, communication codes, tracking codes, and correspondence request codes—you can assign an office to each code. When setting up your account, your system administrator assigns an office (or offices) to your security record. Colleague then compares the office assigned to the code with the office on your security record each time you attempt to use or display a code. If your assigned office does not match the office associated with the code, Colleague denies you access to the code.

Note: An office code is required when defining a document code.

Document Codes

Document codes are used to define the pieces of outgoing correspondence for your institution. These document codes store a profile of the document. The text of the document itself is stored as a separate file in the format used by your word processor.

See “Defining Document Codes” beginning on page 71 for more information on creating document codes.

Communication Codes

Communication codes identify pieces of incoming correspondence from an individual. When your institution receives a piece of correspondence from an individual, the code representing that piece of correspondence is recorded in the system for that individual. The receipt of a piece of correspondence from an individual can trigger other actions, such as updating an individual’s status, sending a piece of outgoing correspondence, or assigning the individual to a follow-up track.
See “Defining Communication Codes” beginning on page 125 for more information on defining communication codes.

Document Tracks

Document tracks, also called follow-up tracks or tracking codes, identify groups of individual pieces of outgoing correspondence. A track is made up of the list of outgoing correspondence and the dates on which the correspondence should be processed.

See “Defining Document Tracks” beginning on page 141 for more information on defining document tracks.

Correspondence Requests

Correspondence requests are like document tracks, but they identify groups of required incoming correspondence (rather than outgoing correspondence). Correspondence requests are also called requirements tracks. A correspondence request is made up of the list of incoming correspondence (communication codes) and any special actions that should take place when all required correspondence is received.

See “Defining Correspondence Request Tracks” beginning on page 153 for more information on defining correspondence requests.
Setup Codes Defined in the Communications Management Module

Your institution should define the following codes when setting up the Communications Management module:

### Correspondence Statuses

Correspondence status codes work with communications codes (incoming correspondence) to define whether the piece of correspondence is received, waived, or incomplete for an individual. When used with correspondence request codes (requirements tracks), these status codes can trigger other actions, such as generating outgoing correspondence or updating a status flag.

Correspondence status codes are user-defined, but they use special processing codes to indicate whether the code triggers another action, as indicated below:

<table>
<thead>
<tr>
<th>Special Processing Field 1</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>blank</td>
<td>If special processing field 1 is blank, the correspondence status code is considered to be <strong>incomplete</strong>. Any requirements defined in a requirements track are not met. No triggers are activated.</td>
</tr>
<tr>
<td>0</td>
<td>If special processing field 1 is set to 0, the correspondence status code is considered to be <strong>waived</strong>. The requirements defined in a requirements track are met, but any triggers are <strong>not</strong> activated.</td>
</tr>
<tr>
<td>1</td>
<td>If special processing field 1 is set to 1, the correspondence status code is considered to be <strong>received</strong>. The requirements defined in a requirements track are met, and any triggers are activated. If you define a correspondence status code that means “received” and do not set special processing field 1 to “1,” none of your triggers will be processed.</td>
</tr>
</tbody>
</table>
Correspondence status codes are maintained on the Validation Codes (VAL) form. These codes are stored as CORR.STATUSUSES in the CORE.VALCODES file.
Document Types

Document types define the various types of documents and correspondence that the Communications Management module should create when processing correspondence. These document types also identify whether the history is updated when a particular document type is used. These document types are used when creating document codes.

Datatel provides and supports the following standard document types:

Table 3: Datatel-supported Standard Document Types

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Output</th>
<th>Initialization Subroutine</th>
<th>Document Merge Subroutine</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASCII</td>
<td>ASCII format output file</td>
<td>S.INIT.ASCII</td>
<td>S.ASCII</td>
</tr>
<tr>
<td>CODE</td>
<td>Update history file only</td>
<td>not applicable</td>
<td>not applicable</td>
</tr>
<tr>
<td>COQT</td>
<td>Comma-quote output file</td>
<td>S.INIT.COMMA.QUOTE</td>
<td>S.COMMA.QUOTE</td>
</tr>
<tr>
<td>DIF</td>
<td>DIF format output file</td>
<td>S.INIT.DIF</td>
<td>S.DIF</td>
</tr>
<tr>
<td>EMAIL</td>
<td>E-mail built from document paragraph</td>
<td>not applicable</td>
<td>S.EMAIL</td>
</tr>
<tr>
<td>FORM</td>
<td>Print form processing</td>
<td>S.INIT.PRINT.FORM</td>
<td>S.PRINT.FORM</td>
</tr>
<tr>
<td>LIST</td>
<td>Saved list format</td>
<td>S.INIT.LIST</td>
<td>S.LIST</td>
</tr>
<tr>
<td>WINTEG.WORD</td>
<td>MS Word mail-merge document. Note: Word 8.0 or higher is needed</td>
<td>S.WINTEG.WORD.INIT</td>
<td>S.WINTEG.WORD.MERGE</td>
</tr>
</tbody>
</table>

You can create additional document types using the Document Type Setup (DTYS) form. See “Defining Document Types” beginning on page 64 for more information.
Person E-mail Types

Person email types define the types of different email addresses used at your institution.

Person email types are maintained on the Validation Codes (VAL) form. These codes are stored as PERSON.EMAIL.TYPES in the CORE.VALCODES file. Your institution may add others if needed.

Your institution must designate which email type is used when processing in Communications Management. This is set up on the Communication Management (PID7) form using the “Processing E-Mail Hierarchy” field. E-mail types are specified in the person’s email address association using the Name and Address Entry (NAE) or the Person Addresses (ADR) form. The first email address found with the earliest type specified in the hierarchy is used to send the communication.
Codes Used in the Communications Management Module

The following codes are used in the Communications Management module. Your institution may have already set up these codes. If not, they must be defined before you can use the Communications Management module.

Office Codes

Office codes identify the office or offices that an individual staff member belongs to. The system uses the office code information associated with an individual staff member to identify whether that individual has access to office-specific information. For example, in the Communications Management module, office codes identify which offices can use specific document codes. Individuals who are not assigned to an office cannot use that office’s document codes. Use the Staff and Volunteers (SVM) form to assign an individual to an office.

Office codes are maintained on the Validation Codes (VAL) form. These codes are stored as OFFICE.CODES in the CORE.VALCODES file.
Communications Management Parameters

In This Chapter

This chapter provides information about the parameters that your institution must set up before using the Communications Management module.

Information about the codes used by the Communications Management module are included in the previous chapter.
Understanding Communications Management Parameters

This section discusses the parameters that you must set up before using the Communications Management module.

Default Word Processor Settings

The Communications Management module interfaces with text editors and word processors to let you compose correspondence, set up merge templates, and compose custom paragraphs. Before you can use your editor or word processor with the Communications Management module, you must define default parameters and settings on the Communications Management (PID7) parameter form.

Mail Merge Setup Using PC-Based Word Processors

You can use Microsoft Word as your word processor for mail merge letters if you have the following system configuration:

- WINTEG.WORD documents — Windows PC with Microsoft Word 2003 or a later version.
- COQT documents — The user must be able to transfer a file from the _HOLD_ file in Colleague to your local PC.

Correspondence Actions

In the Communications Management module, you can use subroutines to create correspondence actions that do the following:

- update fields in other modules or databases
- produce special reports or documents
- send email to another user on the system
You can use these actions during various processes in the Communications Management module, including the following situations:

- when updating history or printing documents through the Process Corres. Batch (PCB) process.
- when recording correspondence as received through the Communication Code Entry (CRI) form, the Group Communication Entry (CRG) form, or the Individual Requests (IRQ) form.
- when a correspondence request is completed through the Communication Code Entry (CRI) form, the Selected Group Entry (CRG) form, or the Individual Requests (IRQ) form.

Correspondence actions include the following types:

- CR - Corres Received
- PA - Print Action
- HA - History Action
- IA - Instance Action
- RC - Requests Completed

The correspondence action types specify the subroutine arguments to use. Use the Corres Actions Definition (CRAD) form to create and maintain actions associated with a correspondence.
Some standard correspondence actions are supplied with your software. These standard action codes include the following:

**Table 4: Standard Action Codes**

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
<th>Type</th>
<th>Subroutine</th>
</tr>
</thead>
<tbody>
<tr>
<td>COLTRANS</td>
<td>This action code looks at an individual's institutions attended entries. When assigned a correspondence request, it produces a requirement for communications codes of the same type for all colleges and institutions attended.</td>
<td>IA</td>
<td>S.COUNT.COLTRANS</td>
</tr>
<tr>
<td>FILECMPT</td>
<td>This action code can be used to update financial aid files with the File Complete Flag when all required or waived communication codes are entered.</td>
<td>CR</td>
<td>S.UPDT.FILE.CMPT</td>
</tr>
<tr>
<td>HSTRANS</td>
<td>This action code looks at an individual's institutions attended entries. When assigned a correspondence request, it produces a requirement for communications codes of the same type for all high schools attended.</td>
<td>IA</td>
<td>S.COUNT.HSTRANS</td>
</tr>
<tr>
<td>LPTR</td>
<td>This action code is used to print custom text fields when processing correspondence.</td>
<td>PA</td>
<td>S.PRINT.LTREQ.CUSTOM</td>
</tr>
<tr>
<td>PCSMAILD</td>
<td>This action code is used to update the DOC.PIECES.MAILED field when history is updated.</td>
<td>HA</td>
<td>S.UPDT.PCSMAILD</td>
</tr>
<tr>
<td>TRNCCUPD</td>
<td>This action updates an individual's institutions attended communication code instances. Assign to a communication code, and add the communication code to the ATRK form to refresh the instances associated with COLTRANS and HSTRANS codes already assigned as part of a correspondence track.</td>
<td>CR</td>
<td>S.UPDT.TRANSCR.CO REQ.CC</td>
</tr>
<tr>
<td>UPDTAPPL</td>
<td>This action code is used to update an admissions application LTREQ record with the list of applications, locations, programs, and academic levels.</td>
<td>CR</td>
<td>S.UPDT.LTREQ.APPL</td>
</tr>
</tbody>
</table>
Staff Setup

To take advantage of many of the privacy and security features available within the system, all staff members using the software must be defined within the system both with PERSON records and with STAFF records. STAFF records associate your staff members with particular offices, privacy levels, correspondence, and address security.

Staff records are created for existing PERSON records on the Staff and Volunteers (SVM) form. See Using Demographics for procedures on adding staff records.
Defining Default Word Processor Settings

Use the Communication Management (PID7) form to set system defaults for Communications Management. The values defined here are strictly default values, used when no other data is entered in the fields on the maintenance forms. Help messages available on the maintenance forms indicate other valid entries.

To implement any changes made on this form, you must exit your UI session and start the session again. Any other users must also exit and restart their UI sessions. This is not required until you actually run a process that uses any of the parameters on this form.

**Figure 8: The Communication Management (PID7) Form**
Noteworthy Fields on the PID7 Form

The following fields are particularly useful when setting the system defaults for communications management.

**Default Batch Print Maximum**

Enter the maximum number of documents to be processed per print batch.

**Default File Suite Processing Year**

Enter the Current File Suite processing year for Rules evaluation.

**WINTEG.WORD Document Format**

Displays the abbreviation of the format name.

**Available**

Enter **Yes** to allow this Microsoft Word document format to be available to users creating new WINTEG.WORD documents.

**Default**

Enter **Yes** to cause WINTEG.WORD documents to be created with this format by default. Users can change the format if they choose.

**Word DOCX Version**

Displays the year for the Word DOCX version.

**Available**

Enter **Yes** to allow this Microsoft Word .docx version to be available to users creating new WINTEG.WORD documents.
Default

Enter Yes to cause WINTEG.WORD documents to be created with this version of the .docx format by default. Users can change the version if they choose.

WINTEG.WORD File Transfer Method

Modify the file transfer method used when editing documents with the Microsoft Word interface in Communications Management. This setting applies to UI 4.2 and later versions only.

Processing E-Mail Hierarchy

Enter the hierarchy to use to select an email address.

Preferred E-Mail Hierarchy

Enter the hierarchy to determine the preferred email address.

Preferred E-Mail Subroutine

Enter a subroutine to determine the preferred email address.

This subroutine is invoked only if the hierarchy entered in the Preferred E-Mail Hierarchy field cannot determine a preferred email address on its own.

Default Return E-Mail

Enter the default email return address for Correspondence Management.

You can override this setting on the E-Mail Document Options (EMLD) form at the document level.

Default Joint Name Format

Select your institution’s formatting preference for joint names.
Additional Settings

Detail on this field to access the Communication Management Additional Settings (PASU100) form, where you can maintain additional Communication Management settings.

Setting System Defaults

Use PASU100 form to set system defaults for Communications Management.

You must exit and restart your UI session to implement any changes to this form. Other users who currently have open UI sessions will not have access to the updated settings until they start a new UI session.

Figure 9: Communication Management Additional Settings (PASU100) Form

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Word Processor Version Number</td>
<td>Use this field to enter the version of the word processor. This information is used only by previous versions of the WINTEGWORD interface, which are no longer supported. If your institution is transitioning from a previous version of WINTEG.WORD, the setting can still be maintained here.</td>
</tr>
</tbody>
</table>
**WINTEG.WORD Directory for UI Desktop**

Select the user directory for temporary WINTEG.WORD files. This field affects only the operation of WINTEG.WORD under UI Desktop. It does not affect UI 4.x and later versions.

**Alternate WINTEG.WORD Directory**

Overrides the end-user directory for temporary WINTEG.WORD files.

This field only affects the operation WINTEG.WORD under UI Desktop. It does not affect UI 4.x and later versions.

Leave this field blank if you want the WINTEG.WORD temporary files to be written to the directory indicated by the WINTEG.WORD Directory for UI Desktop field.

**Note:** Datatel recommends leaving this field blank
Defining Correspondence Actions

Use the Corres Actions Definition (CRAD) form to create correspondence actions. Use the Datatel-provided correspondence actions as starting points to create customized actions if needed.

See the online help for more information about the CRAD form.
Defining Document Types

Use the Document Type Setup (DTYS) form to define the document types you plan to process. When you establish a document type, you create a record in the DOC.TYPE file. Included in the document type definition are such attributes as document class (personal, template, code only), scan characters used to signal the start/end of inserts, subroutines (for initialization, document merging and document editing), and defaults for the merge, document, and output file, as well as a default extension for the key to the output file.

For individual document runs, you can override these default files by entering different values in the Document File Setup (DFS) form, to which you can detail from the Document Codes (DOC) form.

The DTYS form details from the DOC form. Some fields on this form can be overridden by fields in the DFS form (which also is a detail from the DOC form).

**Figure 10: Document Type Setup (DTYS) Form**

![Document Type Setup (DTYS) Form](image)
Noteworthy Fields on the DTYS Form

The following fields are particularly useful when setting up document types.

**Description**

Enter a description of the document type.

The description that you enter here should briefly describe the reason for creating this unique document type.

**Document Class**

Enter P, T, or C to identify the class of this document type.

These document classes are defined in the table WPDOCUMENTTYPES. These classes are generic document types used to determine the default filing area for storing your template or personal boilerplate document text (or of your code only document, if you have set this up). The value you enter here controls what happens when you detail from the Create/Edit Doc field on the Document Codes (DOC) screen.

If you enter P, the text you enter is stored in your default filing area for personal letters, PER.LTRS.

If you enter T, the text you enter is stored in your default filing area for template letters, TMP.LTRS.

If you enter C, the text you enter is stored in the default filing area you have established for your code only letters.

Your institution may have chosen to define other document types, with other associated default filing areas. Contact your System Administrator for more information about where text is stored in any such cases.

**Scan Document**

Enter Y to obtain the list of merge fields from the actual boilerplate document.

Enter N to use the field names entered in the Field Name element of the Merge File Definition window on the Document Merge Processing (DMP) form.
**Scan Start Char**

Enter the character that represents the start of the field to be merged into the boilerplate document, if the list of fields is being obtained from the document itself. This start-of-field character is stored in decimal format. Leave this field empty if you have specified a list of merge field names in the Field Name element of the Merge File Definition window on the Document File Setup (DFS) form.

**Scan End Characters**

Enter the character that represents the end of the field to be merged into the boilerplate document, if the list of fields is being obtained from the document itself. This end-of-field character is stored in decimal format. Leave this field empty if you have specified a list of merge field names in the Field Name element of the Merge File Definition window on the Document File Setup (DFS) form.

**Initialization Subroutine**

Enter the name of any initialization subroutine to run once before the subroutine that actually prints the documents is called. For example, if you use WordMARC to produce your documents, use the subroutine S.INIT.WORDMAR to set up your default filing area. If you use WordPerfect, enter S.INIT.WORDPERFECT here instead.

**Document Merge Subroutine**

Enter the name of the subroutine which actually processes merge documents.

This is the name of the subroutine that performs the actual merging of the additional information into the documents. If the subroutine performs the merge on the host, you may send the resulting output to the spooler as well.

**Document Edit Subroutine**

Enter the name of the document edit routine to use when editing documents.

This is the name of the subroutine that calls your word processing software. If you use WordMARC, enter S.WM.DOC.EDIT. If you use WordPerfect, enter S.WP.DOC.EDIT.
**Default Merge File**

Enter the name of the file from which merge fields are extracted.

This is the name of the file that contains the records that are to be merged into the document. Normally, this file is the LTREQ file, but you may enter another file name here if necessary. For example, if you are inserting prospect names and addresses from a mailing list called PROSPECTS into a boilerplate informational letter, enter PROSPECTS here. You can override this file name by entering a different name in the Merge File Name field on the Document File Setup (DFS) form.

**Default Document File**

Enter the name of the file where the actual boilerplate document is stored.

This is the name of the file that contains the document into which information is to be merged. For example, if you are merging names and addresses into a boilerplate acknowledgment called ACK01, which is stored in TMP.LTRS, enter TMP.LTRS here. You can override this by entering another file name in the Doc File Name field on the Document File Setup (DFS) form.

**ALERT!** If the current document type is email, then this field must be set to DOC.CTL.

**Default Output File**

Enter name of file where output is directed if spooler is being bypassed.

This is the name of a file where output should be placed if you are bypassing the spooler. This is the file to which output subroutines that do not go directly to the spooler write. You can override this by entering the name of another output file in the Output File Name field on the Document File Setup (DFS) form.

**Default Output File Extension**

Enter a three-character extension or suffix for the output file.

The three-character extension or suffix entered here will be used to append the key to the output file.
It will also be used to default an extension to the pathname (if no other extension is entered) on the TPF form, which transfers the file to a PC.
Using Communications Management

Outgoing Correspondence
Defining Document Codes

In This Chapter

This chapter provides an overview of document codes and the fields that are required on the Document Codes (DOC) form. This chapter also provides recommended naming conventions for your document codes and a brief procedure for defining document codes.

Procedures for defining other major codes, such as communication codes and correspondence request codes, are located in separate chapters.

Before You Begin

Before you define document codes you should complete the actions listed in Table 5.

**Table 5: Information Needed Before You Define Document Codes**

<table>
<thead>
<tr>
<th>Action</th>
<th>Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand Communications Management concepts</td>
<td>“Overview of the Communications Management Module” beginning on page 23</td>
</tr>
<tr>
<td>Plan your document codes using the Document Codes worksheet</td>
<td>“Worksheets” beginning on page 189</td>
</tr>
</tbody>
</table>
Understanding Document Codes

All outgoing communications are referred to as documents. There are two types of documents:

- letters or other written communications that you create as either word processing or send as an email.
- “coded” documents that represent pre-printed communications such as brochures and catalogs that you do not generate

A document code is a profile of a document. You must create document codes for all outgoing communications originated by your office. Document codes provide information to Colleague during batch processing, such as the type of output to generate and the type of history to record.

These document codes can be grouped together to form document tracks. For example, Datatel University (DU) always sends a personalized letter and a catalog to a prospect who has returned an inquiry card. The letter is generated by DU and the catalog is a pre-printed document. Each of these documents (the letter and the catalog) have a separate document code.

Use the Document Codes (DOC) form to define all outgoing correspondence.

**Figure 11: Document Codes (DOC) Form**
Components of a Document Code

For all document codes you must define the following:
- document type
- office code
- history type

For pre-printed material the setup of the document code is relatively simple and requires only these components be defined. For other documents generated by your office, the process includes other procedures. See “Creating Documents” beginning on page 77 for more information about creating documents.

These components are discussed in the following sections.

Document Type

The Document Type field is a required field. You must assign a document type to every document code you create. The document type indicates what type of document Colleague should create when processing correspondence. For example, if a document type may be an ASCII or an email document. See “Communications Management Codes” beginning on page 43 for more information about specific document types.

Office Codes

The Office Code field is a required field. You must assign an office code to every document code you create. The office code designates which office can use the document code. When creating a document code, you can only enter an office code to which you have access rights. Likewise, only users who have access rights to the office code you enter can display or use the document code.
History Types

The History Type field is a required field. You must assign a history type to every document code you create. The history type indicates what type of history record should be kept when the document is sent. You may choose the following history types:

Table 6: Standard History Types

<table>
<thead>
<tr>
<th>History Type</th>
<th>Purpose</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code Only</td>
<td>Keeps a history record of the document code whenever this document is sent.</td>
<td>Use the Individual History (IHS) form to view or maintain the history of documents sent to an individual.</td>
</tr>
<tr>
<td>Full</td>
<td>Keeps a full history of this document whenever it is sent.</td>
<td>“Full history” means that the system keeps a copy of the letter request record in the LTR.ARCV file and a copy of the document codes in the DOC.ARCV file.</td>
</tr>
<tr>
<td>None</td>
<td>Does not keep a history record when the document is sent. This history type is not valid for “Code Only” document types.</td>
<td></td>
</tr>
</tbody>
</table>

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Document Code Naming Conventions

When naming document codes, consider ending the code with the letter “D.” In many instances, it is desirable to name different types of codes similarly when you want to group like processing codes together. Ending the code name with a character signifying the type of code represented will greatly assist in avoiding confusion.

For example, Table 7 illustrates how related Communication Management codes could be named for clarity. An application sent to admissions applicants may be identified by a document code named 02APPD. The track associated with this document code might be called 02APPT. The required items of a request could be called 02TRANSC, 02APPC, etc. The request itself could be called 02APPR.

Table 7: Example of Communication Management Code Naming Convention

<table>
<thead>
<tr>
<th>Code Type</th>
<th>Applicable Year</th>
<th>“Root” Code Name</th>
<th>Suffix</th>
<th>Full Code Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Code</td>
<td>2001/02</td>
<td>APP</td>
<td>D</td>
<td>02APPD</td>
</tr>
<tr>
<td>Tracking Code</td>
<td>2001/02</td>
<td>APP</td>
<td>T</td>
<td>02APPT</td>
</tr>
<tr>
<td>Communication Code</td>
<td>2001/02</td>
<td>APP</td>
<td>C</td>
<td>02APPC</td>
</tr>
<tr>
<td>Correspondence Requests</td>
<td>2001/02</td>
<td>APP</td>
<td>R</td>
<td>02APPR</td>
</tr>
</tbody>
</table>

Procedure for Defining a Document Code

Use the Document Codes (DOC) form to create a profile of your outgoing document. You must enter values in the Document Type, Office Code, and History Type fields. Refer to online help for information specific to each field on the DOC form.
Creating Documents

In This Chapter

This chapter provides overview information on creating documents, specifically geared toward the four document types you will use most often. Also, this chapter includes procedures for building and assigning custom paragraphs and then creating a document from custom paragraphs.

To ease usability of your documents, this chapter includes procedures on how to set up and use word processors, such as Microsoft Word, with your documents.

Before You Begin

Before you create documents you should complete the actions in Table 8.

Table 8: Information Needed Before You Create Documents

<table>
<thead>
<tr>
<th>Action</th>
<th>Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand Communication Management concepts</td>
<td>“Overview of the Communications Management Module” beginning on page 23</td>
</tr>
<tr>
<td>Understand Communication Management codes</td>
<td>“Communications Management Codes” beginning on page 43</td>
</tr>
<tr>
<td>Understand document types</td>
<td>“Communications Management Codes” beginning on page 43</td>
</tr>
<tr>
<td>Understand document codes</td>
<td>“Defining Document Codes” beginning on page 71</td>
</tr>
</tbody>
</table>
Understanding Document Creation

All outgoing correspondence must have a document code. Your pre-printed material, such as brochures and catalogs, have simple document codes. Colleague also allows you to create and send individual or group letters and emails. Colleague stores these documents in the Letter Request (LTREQ) file. Each record in the LTREQ file represents a single piece of correspondence assigned to a person. The LTREQ file allows you to use name and address hierarchy, personalized salutation and document paragraphs.

After creating a document you can assign it to an individual or a group of individuals. Then you can process the document in a batch process. See “Assigning Documents to Individuals” beginning on page 111 for more information about assigning documents to individuals. See “In This Chapter” beginning on page 169 for more information about processing a batch of documents.

Of the document types available in Communications Management, you will use the following four most often:

- Code — Updates the history file only; generates no output file. This is used when you have no need to generate output, but you want to track that you sent information. A mass-produced letter sent with mailing labels would be a CODE type document.
- COQT — Generates a comma-quote output file that can be downloaded to a word processor mail merge.
- WINTEG.WORD — Used in combination with Microsoft Word to generate a comma-quote output file, which is automatically merged with a Word document to produce mail merged letters on Word. You can use this document type to produce personalized form letters, address labels, file labels, and worksheets.
- EMAIL — Generates email.
Building Custom Paragraphs

If you want to customize the documents your office sends out, you can create custom paragraphs to use as building blocks in your documents. Custom paragraphs may contain text for use in letters and email documents, or they may contain codes that can be passed into your word processor and translated as text. Custom paragraphs also allow you to customize documents using variable text and rules.

Use the Define Custom Paragraphs (DPAR) form to create custom paragraphs you can then use in many different documents.

**Figure 12: Define Custom Paragraphs (DPAR) Form**

Each custom paragraph has a unique name or code associated with it. You can then use these codes to build your custom documents.

The Merge File specified for a paragraph used by a CC document must be LTREQ, PERSON, or any co-file of PERSON (shares the same key as PERSON) and must match the merge file of the document in which it is used.
You can indicate whether to recalculate the text wrapping in the custom paragraphs. Colleague will accordingly recalculate the paragraph text wrapping when paragraph data is merged. You can select from the following options:

- **R – Recalculate line breaks.** Select this option to reformat to a 69 character line after the merge fields are replaced. The length of the text replacing the merge fields may vary between data records, resulting in lines that are too long or short. 69 characters is an appropriate width for word wrapping plain text emails. At this length the lines of the email are unlikely to be broken up by subsequent word wrapping performed by some email transport systems.

  **Note:** Any blank lines within the original paragraph will not be affected by the word wrapping.

- **N – None - remove line breaks.** Select this option to remove all line breaks from the paragraph after the merge fields are replaced with data to generate a single long line that can be formatted as appropriate by the word processor or email server. However, blank lines in the original paragraph are retained, including those at the beginning or end of the paragraph. This option is most appropriate for paragraphs internal to a Word document. This option may also be appropriate for email if outgoing emails are MIME encoded because MIME encoding causes email line breaks to adjust to the width of the window size. Contact your email system administrator to determine if this is a good option for your system.

- **K – Keep line breaks.** Select this option if you want the paragraph's line breaks to remain just as you enter them, for instance for an email or letter signature block. If you select this option, Colleague keeps the original line breaks even after merge fields are replaced with data. If you leave this field blank, this is the default option used.

The reformatting option you select on the DPAR form affects the number of values in the multivalued field LTREQ.CUSTOM[n], because each line break creates an additional value. You may need to increase the number in the Max Values field on the Document File Setup (DFS) form.

Also, if you use multiple lines of text, you will need to account for each line when setting Max Values on the Document File Setup (DFS) form.

  **Note:** See page 90 for information on DFS and page 93 for information on Max Values.

For more information about the DPAR form, see the online help.
Using Merge Fields in a Custom Paragraph

Custom Paragraphs which contain merge fields are primarily used for email documents. Data merging for documents which use a word processor is best defined on the Document File Setup (DFS) form. See “Procedure for Setting Up and Using Word Processors” beginning on page 90 for further information.

Note: If you enter merge fields here, you will have less control over formatting than with a word processor. Also, when you add the custom paragraph, you will be using up a position in the Custom Paragraphs table on the Document Paragraphs (DOCP) form. For these reasons, merge fields are more commonly used for email documents.

If you want to include merge fields in your paragraph, the fields must exist in the Merge File you specify for the custom paragraph. For each custom paragraph you can specify only one merge file to be used.

Technical Tip: To include a field that does not already exist in the Merge file, you must first define it as a virtual field residing in the dictionary of the Merge file. For example, if you use LTREQ as the Merge file and need to merge into your paragraph a data element pointed to by the field LTREQ.SOURCE.KEYS, then you will first need to create a virtual field in LTREQ which uses the TRANS function to retrieve the desired data. Use the Define Computed Column (DCC) form to define virtual fields.

To include the merge field in the text, you’ll use a placeholder: @ followed by the field name. For example, you enter:

Dear @FIRST.NAME ,

When you process the document, the placeholder will be replaced with:

Dear James,

Note: You must leave a space after the field name to indicate that the field name has ended; for example:

Dear @FIRST.NAME ,

If you do not leave a space, an error will occur. The extra space will not appear in the actual text sent to the individual.
Assigning Custom Paragraphs

After you have created your custom paragraphs, you can use them as building blocks in many different documents.

Note: You can also create custom paragraphs on the fly as you create your documents. However, Datatel suggests that it is easier to create the custom paragraphs first.
Assigning Document Paragraphs

Use the Document Paragraphs (DOCP) form to indicate the paragraphs to be included in a document when a letter request is generated. You can access the DOCP form either by detailing from the Document Codes (DOC) form or directly from the menu.

Using this form you can specify the relative position of each paragraph and the rules associated with the paragraph. Through this form you can also indicate whether or not the paragraph should be recalculated when the letter request is generated and the document is processed. The DOCP form is displayed below.

**Figure 13: Document Paragraphs (DOCP) Form**

![DOCP Form](image)

On DOCP enter **N** in the Recalculate Paragraphs field if you will want to customize individual letters after they are assigned to a specific person. Enter **Y** if you will not need to customize letters. See “Customizing Individual Documents” beginning on page 115 for more information about customizing individual letters.

For each custom paragraph used in a document, you must enter the following in the Custom Paragraphs table:

- the custom paragraph code
- the position
- applicable rules

Each of these components are discussed in the following sections.
Custom Paragraph Code

The custom paragraph code is the name you gave each custom paragraph as you created it on the Define Custom Paragraphs (DPAR) form.

Position

The position is the order you want each custom paragraph to be inserted within the document. There are only five locations, but you can assign the same position number to more than one paragraph. Colleague inserts the paragraphs in the order listed on the DOCP form.

Note: If you are using an EMAIL document type and you leave the Position field blank, the email will not be sent.

Rules

You can enter rules that you want Colleague to evaluate before determining if the associated custom paragraph should be included in an individual letter. For example, you may have a rule that evaluates whether a prospect is male or female and use a different salutation paragraph for each.

For more information about the fields on the DOCP form, see the online help.
Setting Up Hardcopy Document Options

Use the Hardcopy Document Options (HDCD) form to enter the options specific to hardcopy documents sent out to people. You can access the HDCD form either by detailing from the Document Codes (DOC) form or directly from the menu. The fields on this form can be used for word processing merge documents.

Using this form, you can specify hardcopy document parameters such as the printer and document file. Through the HDCD form, you can also edit the main document text by accessing a word processor from the Create/Edit Document field. See “Procedure for Setting Up and Using Word Processors” beginning on page 90, for further information.

Figure 14: Hardcopy Document Options (HDCD) Form
Noteworthy Fields on the HDCD Form

The following fields are particularly useful when entering the options specific to hardcopy documents.

**Printer Number**

Enter the printer number associated with your word processor.

**Document File**

Enter the name of the file that contains the boilerplate document. If you do not enter a file here, Colleague will use the default file specified in the Default Document File field on the Document Type Setup (DTYS) form.

**Word Processor Document Format**

Select the format of the word processor document. This field is enabled only for Communications Management document types to which it applies.

To change the format of an existing document, change the value in this field, and then edit the document by detailing on the Create/Edit Document field.

**New docx File Version**

When creating a new Microsoft Word document in the .docx format, use this field to specify whether the initial document should be a Word 2007 .docx file, or a Word 2010 .docx file.

Your institution may have limited this field to one option. This field is only enabled if you are creating a new Word file in the .docx format.

**Create/Edit Document**

Detail from this field to start your word processor. Using the word processor, you can edit the text of the main merge document and add merge fields. After completing editing, save the document in your word processor, return to your Colleague session, and respond to the prompt here to save or cancel your changes.
Setting Up E-Mail Document Options

Use the E-Mail Document Options (EMLD) form to enter the options specific to email type documents. You can access the EMLD form either by detailing from the Document Codes (DOC) form or directly from the menu. Using the EMLD form you can specify the return email address, reply-to address, and the subject line for the email. The EMLD form is displayed below.

Figure 15: E-Mail Document Options (EMLD) Form

<table>
<thead>
<tr>
<th>DOC - Document Codes</th>
<th>EMLD - E-Mail Document Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Name : PC.LTRS</td>
<td>Return Address: <a href="mailto:ngoffice@datateluniversity.edu">ngoffice@datateluniversity.edu</a></td>
</tr>
<tr>
<td>Document Type :</td>
<td>Reply-to Address:</td>
</tr>
<tr>
<td></td>
<td>E-Mail Subject:</td>
</tr>
<tr>
<td></td>
<td>Example Letter:</td>
</tr>
</tbody>
</table>

Noteworthy Fields on the EMLD Form

Fields on this form are not required fields, and if you do not enter any values, default values are used. This section briefly describes the fields on the EMLD form.

Return Address

Enter the return address to be associated with the emails generated using the selected document. This is the return address to which the email will bounce back if it cannot reach its destination. If you do not enter a return email address in this field, the address specified in the Default Return E-Mail field
on the Communications Management (PID7) form is used. If no return email address is specified on the PID7 form, Colleague uses the return address of the server from where the documents are sent.

**Note:** The return address specified here may not work on all server configurations, though it works in general. You may need to handle the return address individually depending on your server. For example, in some cases of IBM AIX it is necessary to specify a parameter at the server level indicating the return address to use.

---

**Reply-to Address**

Enter the address to which the recipients of the selected email document can send their replies. If you do not specify an address in this field, Colleague uses the author’s email address as determined by the email hierarchy entered in the Processing E-Mail Hierarchy field on the PID7 form.

---

**E-Mail Subject**

Enter the subject line for the emails generated when the selected document is processed. If you do not enter a subject line, Colleague uses the document description as the default subject line for the emails.

---

**Procedure for Setting Up E-Mail Document Options**

Follow the steps below to specify the email document options for the emails generated when the selected document is processed.

**Step 1.** Access the E-Mail Document Options (EMLD) form.

**Step 2.** Enter the return address, reply-to address, and the subject line, as required, for the emails generated by the selected document.

**Step 3.** Update out of the EMLD form.

For more information about the EMLD form, see the online help.
Building a Document from Custom Paragraphs

Use the Document Codes (DOC) form to build a document from your custom paragraphs.

**Figure 16: Document Codes (DOC) Form**

To set up the paragraphs to include in the document, from the Document Paragraphs field detail to the Document Paragraphs (DOCP) form.
Procedure for Setting Up and Using Word Processors

Note: The Microsoft Word version must be 8 or higher.

Step 1. To use word processors with your document, access the Document Codes (DOC) form. From this form you can detail to the Define Custom Paragraphs (DPAR) form to enter custom paragraphs, to the Document File Setup (DFS) form to enter merge fields for your document, to the Document Paragraphs (DOCP) form to set up the paragraphs to include in the document, or to the Hardcopy Document Options (HDCD) form to specify options for hardcopy documents.

Figure 17: Document Codes (DOC) Form

Step 2. In the Merge File field, enter the file from which the data will be extracted from Colleague. If you are using custom paragraphs, you must enter the Merge File as LTREQ. If you are not using custom paragraphs, you can use LTREQ, PERSON, or any co-file of PERSON (such as FACULTY or STUDENTS).
The merge file must give you access either directly or indirectly (via pointers) to the data you wish to incorporate into the document. See page 95 for further information about pointers.

**Step 3.** If you are setting up merge fields, from the Document File Setup field detail to the Document File Setup (DFS) form.

![Figure 18: Document File Setup (DFS) Form](image)

**Note:** This form is used only in conjunction with word processing. It is not designed to be used with other document types.

**Step 4.** In the Merge File field, enter the name of the merge file. All data you want included must be accessible from the merge file. Data can be accessed directly, via a virtual field, or via a pointer. See page 95 for more information on virtual fields and pointers.

**Step 5.** Are you using a COQT or a WINTEG.WORD document?
COQT. Leave the Document File field blank. The document will be created from Microsoft Word and stored on the hard drive or on a network drive rather than on the Colleague host.

WINTEG.WORD. Enter the Colleague directory in which this document’s associated Word document will be stored. Two directories are delivered specifically for this purpose: PC.LTRS and TMP.LTRS; however, you are not required to use these.

**Step 6.** Are you using a COQT or a WINTEG.WORD document?

**COQT.** Enter _HOLD_ in the Output File field. When the file is created by Colleague, it is held in the Output File until downloaded to the word processor. See page 179 for further information.

**WINTEG.WORD.** Leave the Output File field blank.

**Step 7.** In the Field Name field, enter the data fields you want in the document. For example, you can use name fields, address fields, or any other fields stored in the specified file.
Step 8. In the Max Values field, enter the maximum number of values to be transferred for a multi-valued field.

Note: The fields LTREQ.CUSTOM1, LTREQ.CUSTOM2, and so on contain the text of custom paragraphs specified on the DOCP form. LTREQ.CUSTOM1 will contain the text of all paragraphs in position 1 on DPAR, LTRQE.CUSTOM2 the text of paragraphs in position 2 and so forth. You must include the appropriate LTREQ.CUSTOM fields on the DFS form in order for paragraph text to be included in the merge data. Be sure to account for the maximum number of lines of text that may exist in any one paragraph position on the DOCP form, when setting Max Values for the corresponding LTREQ.CUSTOM field on the DFS form.

For example, if only one paragraph is specified for position 2 on the DOCP form, and that paragraph may contain 5 lines of text, enter 5 in the Max Values field on the DFS form for the LTREQ.CUSTOM2 field.

If more than one paragraph occupies a particular position on the DOCP form, account for the sum total of the number of lines in all of the paragraphs assigned to that position. In addition, increase the Max Values field to account for the blank line that Colleague will insert between each paragraph that is assigned to the same position.

Also note that the Reformatting Option setting of a paragraph on the DPAR form affects the number of lines it may occupy. Please see the documentation for the Reformatting Option field on the DPAR form for more information.

Step 9. Save at the DFS form to return to the DOC form.

Step 10. Are you using a COQT or a WINTEG.WORD document?
COQT. Save at the DOC form and continue in Microsoft Word. You must create a header record in Word. To do this:

1. Open your form letter.
2. Access the Create Header Source window from the Tools menu by selecting Mail Merge, Get Data, Header Options, then Create.
3. Remove Word-delivered field names.
4. Enter field names in the order listed on the DFS form.
5. For each field on DFS that has a Max Value, create a field name for each number in Max Values.
6. Name and save the Header record.
7. Use Mail Merge to create a merge document from your form letter.

Technical Tip: A Header record in Microsoft Word 2000 and Word 97 can contain up to 62 fields. If you have more than this, use a spreadsheet program such as Excel to create the Header record.

WINTEG.WORD. From the Hardcopy Document Options field detail to the Hardcopy Document Options (HDCD) form. Detail on the Create/Edit Document field to access Microsoft Word. Header records will be created from the data entered on DFS for WINTEG.WORD document types.

Note: For a WINTEG.WORD document type, the fields defined on DFS are used to build the data source for the merge. All periods are removed and each field name is upper- or lower-cased for clarity. During a merge, the first record in the data source will be the field list (that is, header record).

For WINTEG.WORD documents only, continue the next steps.

Step 11. The first time you detail on the Create/Edit Document field, you may be prompted for an ftp password in UI Desktop. After you enter this information for a particular environment, you will not be prompted again.

Once you detail on the Create/Edit Document field, Microsoft Word will open with a document DATATEL.DOC

Step 12. When you are finished, save the document. You are returned to Colleague.

Step 13. Update from the Colleague DOC form.
Using Virtual Fields and Pointers on the DFS Form

The Document File Setup (DFS) form defines the list of data elements extracted from Colleague and stored into the data source file. After building the file, Colleague exports it to your PC for use by your word processor’s data merge feature as its source for merge data.

**Figure 19: Document File Setup (DFS) Form**

The Merge File in this example is LTREQ because the majority of fields being extracted reside in or can be derived from this file.

All data you want included in a document must be accessible from the merge file. Data can be accessed directly, via a virtual field, or via a pointer (fields not in LTREQ, such as SSN which is in the PERSON file, require a pointer).

- Directly accessible data elements are those which are stored in the merge file itself. To list a directly accessible data element on DFS, simply enter its name into the Field Name field.
- A virtual field is defined on the Virtual Fields (RDVF) form. This field is derived by using existing data elements of the merge file to calculate a value. Once defined, this virtual field can be used on the DFS form, as if it
were a direct-access element. To list a virtual field of the merge file on DFS, just enter its name into the Field Name field.

- Pointers provide another way to access data on DFS. If the merge file contains a data element which points to (stores the ID of) another file, then you can access any data element in the other file. For example, the LTREQ file contains a data element called LTREQ.PERSON. This data element is defined as a pointer to the PERSON file. So if your Merge File is LTREQ, DFS still allows you to access any field from the PERSON file.

  LTREQ already contains many predefined pointers (such as LTREQ.PERSON). Therefore, when you enter a data element from the PERSON file in the Field Name field, the Pointer is defaulted in. If you enter a data element and no pointer defaults in, you will have to create a pointer to that file.

**Technical Tip:** You can tell what pointers are contained in a file by examining the file on the File Element Inquiry (RFEI) form. Also, you can tell what files a pointer points to by detailing from the RFEI form to the Database Element Linkages (RDEL) form. Note the names of the data elements given in the Secondary Pointer field. The name of the file that is keyed by a data element is usually the same as the data element name minus ".ID."

To create a pointer, you must first build a virtual field on the Virtual Fields (RDVF) form, then make the virtual field into a pointer on the Database Element Linkages (RDEL) form.

**Technical Tip:** It is suggested that you do not make changes to existing pointers by adding fields to the Secondary Pointer field since if the field is re-delivered by Datatel, this custom change would be overwritten by the new release.

For example, suppose you have a custom application which uses a custom file called X.PERSON (keyed by field “X.ID”) which is a co-file of Colleague’s PERSON file. Since X.PERSON is a co-file of PERSON, any field which stores a PERSON ID, by definition also stores an X.PERSON ID. This means that you can access the LTREQ.PERSON field on RDEL and add X.ID to its Secondary Pointer list. Once you've done this and filed RDEL, all fields from the X.PERSON file can then be referenced on DFS as fields pointed to by LTREQ.PERSON.

**Note:** The pointer field LTREQ.SOURCE.KEYS in the LTREQ file points to records in other files. The files being pointed to depends on the process which created the LTREQ record. The field LTREQ.SOURCE.KEYS is associated with LTREQ.SOURCE.FILES. Look at the contents of LTREQ.SOURCE.FILES to determine which file(s) are being pointed to.
Setting Up Joint Mailing

Use the Joint Mailing (JTML) form to set up a joint mailing relationship between two persons already in a relationship. This is a detail only form and can be accessed from the Communication Information (COM) and the Relationships (RELE) forms. The JTML form is displayed below.

Figure 20: Joint Mailing (JTML) Form

Each person may participate in a joint mailing relationship with only one other person. When establishing a new joint mail relationship, if upon entering this form either of the two persons already has a joint mail relationship with someone else, a message is displayed indicating the existing joint mail partner and warning that the previous joint mailing relationship will be replaced by the new relationship. In order to retain the existing joint mail relationship, cancel out of the form. Update from the form with the new settings to establish the new joint mail relationship.

Note: The relationship for which you need to set up the joint mailing partnership should already exist. You cannot add a new relationship from this form.
To add a new relationship use the Person Relations (PREL) and the Relationships (RELE) forms. Access the JTML form from the RELE form.

**Noteworthy Fields on the JTML Form**

Most of the fields on the JTML form have a default value, but allow for an override value. These fields display both the default and the override value. To return to using the default value, delete the associated override value. This section briefly describes some of the fields on the JTML form.

**Use Address of**

Select the person whose address is to be used for joint mailing or solicitation. In this field you can only enter a value that is either the ID of the person in the header or the ID of the related person. If you leave this field blank, the default value is used, which is the lesser of the two person IDs.

**Author-Specific**

Accepts author-specific joint salutation overrides. Using this field you may define a custom salutation for a staff member who needs to address this relationship in a unique or personal way. Use Staff LookUp to identify a staff member and then enter an associated joint salutation. After a custom salutation has been entered for a staff member, any document authored by that staff member for this joint relationship will use that custom salutation.

**Joint Mail Label Name - Override**

Accepts an override to the default joint mail label name.
Procedure for Setting Up Joint Mailing

Follow the steps below to set up a joint mailing relationship.

**Step 1.** Access the Joint Mailing (JTML) form.

**Step 2.** Indicate whether or not joint mail or the joint solicitation should be set up.

**Step 3.** Enter any other override values, as needed.

**Step 4.** Update out of the JTML form.

For more information about the JTML form, see the online help.
Using Mail Merge with Microsoft Word

In This Chapter

This chapter describes how to set up and use the Communications Management mail merge feature to set up and process printed correspondence using template text merged with data from Colleague into a Microsoft Word mail merge document.

Table 9 lists the topics covered in this chapter.

Table 9: Topics in This Chapter

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understanding the Mail Merge Feature</td>
<td>102</td>
</tr>
<tr>
<td>Setting Up the Mail Merge Document Template</td>
<td>102</td>
</tr>
<tr>
<td>Merging the Template with Data</td>
<td>106</td>
</tr>
</tbody>
</table>
Understanding the Mail Merge Feature

Using the mail merge feature involves two basic steps:
- Setting up the mail merge document template.
- Merging the template with data to create correspondence.

The steps in this section are created from a PC running Windows 7, Internet Explorer 8, and Microsoft Word 2007.

With the many possible combinations of browsers, browser settings, and Microsoft Word settings, you may experience some variation in the way the files are processed with UI 4.2. On some systems, files may download and open automatically. On other systems, you may need to click an extra button or link to download or open a document. Also, you may experience some variation in the way macros are processed within Microsoft Word. Depending on your settings, macros may run automatically. In some cases, you may have to enable macros and then run the macro manually.

**Technical Tip:** In Microsoft Word you must set macro security to medium or low. To do this, go to Tools>Macro>Security. If Macro Security is set to High, you will not be able to execute the macro that moves the Word file between Colleague and Word.

Setting Up the Mail Merge Document Template

The mail merge document template is the document containing the template text and placeholders for Colleague data fields. For example, to create a form letter to be mailed to alumni, the document template would contain the text of the letter and then the fields from Colleague that you want to add to the letter, such as the name and address of each alumnus.
Procedure for Setting Up the Mail Merge Document Template

Use the following steps to create the template.

**Step 1.** Access the Document Codes (DOC) form.

**Step 2.** At the Document LookUp prompt, enter an existing document code or create a new code.

**Step 3.** Ensure that the Document Type field on the DOC form is set to WINTEG.WORD. Complete all other required fields. See the online help for more information.

![Figure 21: Document Codes (Doc) Form]

**Step 4.** For a new document code, detail on the Document File Setup field to access the Document File Setup (DFS) form to specify the fields from Colleague to use in the template. See the online help for more details. Save your changes and return to the DOC form.
Step 5. From the DOC form, detail on the Hardcopy Document Options field to access the Hardcopy Document Options (HDCD) form.

Figure 22: Hardcopy Document Options (HDCD) Form

<table>
<thead>
<tr>
<th>Document Name :</th>
<th>PC.LTRS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Type :</td>
<td>WINTEG.WORD MS Word for Windows Merge</td>
</tr>
</tbody>
</table>

Step 6. On the HDCD form, detail on the Create/Edit Document field to create the mail merge template document. The following message with a hyperlink for the file appears:

Figure 23: Example of Hyperlink to the .DOCM File

The CONTROL.DOCM file is a file containing the macros needed to create the mail merge template file.

If the file does not open automatically, click the link provided.

Step 7. When Microsoft Word opens the CONTROL.DOCM file, it should run a macro that opens another file named DATATEL.DOC, which is the actual mail merge template file. If macros are disabled on your PC, look for the
following message in the upper left corner of the Microsoft Word window, below the ribbon:

**Figure 24: Example of a Disabled Macro**

Step 8. To enable macros, from the security warning message, click **Options**. From the Microsoft Office Security Options dialog box, click **OK**.

Microsoft Word should then open the mail merge template file (DATATEL.DOC). If the file DATATEL.DOC does not open automatically, press **Alt+M** to run the macro that opens the file.

Step 9. When the DATATEL.DOC file is opened in Microsoft Word, edit your text and insert merge fields as needed to create the mail merge template file. Save your changes and close the document when complete.

Step 10. Save your changes from the HDCD and DOC forms. The template file is ready for merge processing.
Merging the Template with Data

After the template is created, you can use it to create correspondence using data from Colleague to merge into the fields of the template.

Procedure for Creating Mail Merge Correspondence

Use the following procedure to create mail merge correspondence with Communications Management in UI 4.2.

Step 1. Access the Process Correspondence Batch (PCB) form.

Figure 25: Process Correspondence Batch (PCB) Form

Step 2. At the Batch Process LookUp prompt, open an existing batch or create a new one. The batch must include documents with the WINTEG.WORD document type.

Step 3. In the Action field at the bottom of the form, enter P to process the batch. The Process Corres Print Options (PCBP) form is displayed.
Step 4. Complete the PCBP form and save your changes. A message with a hyperlink for the file is displayed.

The CONTROL.DOCM file is a file containing the macros needed to create the mail merge template file.

If the file does not open automatically, click the link provided.

Step 5. When Microsoft Word opens the CONTROL.DOCM file, it should run a macro that opens another file named DATATEL.DOC, which is the actual mail merge template file. If Macros are disabled on your PC, look for the following message in the upper left corner of the Microsoft Word window, below the ribbon:
Step 6. To enable macros, from the security warning message, click Options. From the Microsoft Office Security Options dialog box, click OK.

Microsoft Word should then open the mail merge template file (DATATEL.DOC). If the file DATATEL.DOC does not open automatically, Alt+M to run the macro that opens the file.

Step 7. When the DATATEL.DOC file is opened in Microsoft Word, it is now linked to the Colleague data source specified when you created the template. Use the Microsoft Word Mail Merge features to merge the DATATEL.DOC file with the Colleague data. To merge the data, select Finish and Merge from the Microsoft Word ribbon (or press Alt+Shift+N), and then select Edit Individual Documents.

When you select Edit Individual Documents, the following dialog box is displayed.

Step 8. Select the merge records that you want to process, and click OK. Microsoft Word creates a new document with a page for each piece of correspondence, filling in the fields in the template with the selected Colleague data.

Step 9. Review, save and print the merged correspondence document as needed.

Step 10. When finished, save and close all documents and exit Microsoft Word.
Step 11. Click Close Window when you are prompted to close the message with the link for opening the CONTROL.DOCM file.

Step 12. Click OK when you are prompted that the merge is complete. You are returned to the PCB form.

Step 13. Save your changes and exit the PCB form. The mail merge process is complete.
Assigning Documents to Individuals

In This Chapter

This chapter provides an overview of and procedure for assigning documents to individuals so that only a specific person receives a particular document.

Before You Begin

Before you assign documents to individuals you should complete the actions listed in Table 10.

<table>
<thead>
<tr>
<th>Action</th>
<th>Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand Communications Management concepts</td>
<td>“Overview of the Communications Management Module” beginning on page 23</td>
</tr>
<tr>
<td>Define your document codes</td>
<td>“Defining Document Codes” beginning on page 71</td>
</tr>
<tr>
<td>Create your own documents (optional)</td>
<td>“Creating Documents” beginning on page 77</td>
</tr>
</tbody>
</table>
Understanding Document Assignment

After creating a document code to represent a piece of outgoing correspondence whether it is pre-printed or generated by your office, you can assign that code to an individual if you want a specific person to receive that piece of correspondence.

Use the Individual Pending Corres (IPC) form to assign a piece of correspondence to an individual.

**Figure 30:** Individual Pending Corres (IPC) Form

The IPC form lets you view all pending correspondence for an individual. You can use this form to customize correspondence, change the parameters for generating the correspondence, and add or delete pending correspondence.
To assign a document to this individual, detail to the Individual Pending Corres Det (IPCD) form from a blank line in the Pending Correspondence Summary group, as shown in Figure 31. In the Document Name field, enter the document code you want to assign.

**Figure 31: Assigning a Document to an Individual**

If you want to assign one or more documents to a group of people at once rather than individually, create a follow-up track of the documents you want to assign, then assign the track to the individuals in group mode. For more information about creating and assigning follow-up tracks, see “Defining Document Tracks” beginning on page 141 and “Assigning Document Tracks” beginning on page 147.
Procedure for Assigning a Document to an Individual

Complete the following steps to assign a document to an individual:

**Step 1.** Access the individual for whom you want to assign an outgoing document on the Individual Pending Corres (IPC) form.

The IPC form displays with all documents currently pending for this individual.

See the online help for more information about a specific field.

**Step 2.** In the Pending Correspondence Summary field, go to a blank line or insert a line.

You can also delete any existing pending correspondence in this list by deleting the document or replacing it with a new document.

**Step 3.** Detail to the Individual Pending Corres Det (IPCD) form.

The IPCD form displays.

**Step 4.** Go to the Document Name field. Enter a document code to assign that document to the individual.

You must also specify a print date for the document.

From the IPCD form, you can also add custom text, add a custom salutation, or change the address hierarchy for new or existing correspondence. Other details that you can enter on this form include correspondence name, label name, and mail type.

**Step 5.** Save the record.

This piece of correspondence remains pending until it is processed. See “Processing Pending Correspondence” beginning on page 169 for more information about processing your pending correspondence.
Customizing Individual Documents

In This Chapter

This chapter provides an overview of and a procedure for customizing documents after they have been created and assigned to individuals.

Information for creating and assigning documents is included in the previous chapter.
Before You Begin

Before you can customize documents you should complete the actions in Table 11.

Table 11: Information Needed Before You Can Customize Documents

<table>
<thead>
<tr>
<th>Action</th>
<th>Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand document codes</td>
<td>“Defining Document Codes” beginning on page 71</td>
</tr>
<tr>
<td>Understand creating documents</td>
<td>“Creating Documents” beginning on page 77</td>
</tr>
<tr>
<td>Understand assigning documents to individuals</td>
<td>“Assigning Documents to Individuals” beginning on page 111</td>
</tr>
</tbody>
</table>
Understanding Document Customization

You can customize individual documents after you have created the document and assigned it to an individual (or group of individual). See “Creating Documents” beginning on page 77 for more information about creating your documents. See “Assigning Documents to Individuals” beginning on page 111 for more information about assigning the documents to individuals.

Note: You can only customize a document if you have entered NO in the Recalculate Paragraphs field on the Document Paragraphs (DOCP) form when you created the document.

To customize individual documents, you must do the following:
1. access the list of all documents pending for an individual
2. locate the particular document you want to modify
3. select the particular paragraph you want to modify

These steps are discussed in the following sections.
Listing All Pending Documents for an Individual

Use the Individual Pending Corres (IPC) form, shown in Figure 32, to see a list of all documents pending for an individual.

Figure 32: Individual Pending Corres (IPC) Form
Locating the Particular Document

Locate the particular document you want to modify in the Pending Correspondence Summary group. Detail from there to the Individual Pending Corres Det (IPCD) form, as shown in Figure 33.

**Figure 33:** Individual Pending Corres Det (IPCD) Form

![IPCD form](image)

The IPCD form list characteristics of that particular document.
Selecting a Particular Paragraph

You can see a list of all the custom text paragraphs for a particular document. Detail from the Custom Text field on the IPCD form to the Pending Corres Custom Text (IPCT) form, as shown in Figure 34. The IPCT form lists the text for all of the custom paragraphs defined for the particular document.

**Figure 34: Listing All Paragraphs in a Document**

You can then modify any or all of the custom text paragraphs, as necessary. From the Custom Text field on IPCT, you can detail to the Custom Paragraph (UTEC) form to enter or modify the required text.

**Procedure for Customizing an Individual Document**

Complete the following steps to customize an individual document:

**Step 1.** Familiarize yourself with the customization process.
See “Understanding Document Customization” on page 117.

**Step 2.** Access the individual’s record using the Individual Pending Corres (IPC) form.

The IPC form displays with a list of all of the pending documents for the individual.

See “Listing All Pending Documents for an Individual” on page 118 for more information.

**Step 3.** Locate the particular document you want to customize.

**Step 4.** Detail to the Individual Pending Corres Det (IPCD) form.

The IPCD form displays with many of the document’s characteristics.

See “Locating the Particular Document” on page 119 for more information.

**Step 5.** Detail to the Pending Corres Custom Text (IPCT) form.

The IPCT form displays with all of the documents custom text paragraphs.

**Step 6.** Detail from the Custom Text filed.

See “Selecting a Particular Paragraph” on page 120 for more information.
Step 7. Select the paragraph you want to customize and modify it as necessary.

Repeat this step for as many of the custom paragraphs as you want to customize.

Step 8. Save out of all forms.
Defining Communication Codes

In This Chapter

This chapter provides overview information about communication codes and includes recommended naming conventions for communication codes. This chapter tells you how to define communication codes and also trigger other actions using communication codes when a piece of correspondence comes in from an individual.

Information about recording incoming correspondence, is provided in a subsequent chapter.

Before You Begin

Before you define communication codes you should complete the actions listed in Table 12.

Table 12: Information Needed Before You Define Communication Codes

<table>
<thead>
<tr>
<th>Action</th>
<th>Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand Communications Management concepts</td>
<td>&quot;Overview of the Communications Management Module&quot; beginning on page 23</td>
</tr>
<tr>
<td>Plan your communication codes using the Communication Codes worksheets</td>
<td>“Worksheets” beginning on page 189</td>
</tr>
</tbody>
</table>
Understanding Communication Codes

Communication codes identify pieces of incoming correspondence from an individual. When your institution receives a piece of correspondence from an individual, the code representing that piece of correspondence is recorded in the system for that individual. The receipt of a piece of correspondence from an individual can trigger other actions, such as updating an individual’s status, sending a piece of outgoing correspondence, or assigning the individual to a follow-up track.

The Communication Codes (CMC) form allows you to create codes and define actions for all of your expected incoming correspondence.

**Figure 35: Communication Codes (CMC) Form**
You define communication codes on the Communication Codes (CMC) form. You can access the CMC form from the menu level or by detailing from the following forms:

Table 13: Forms that Allow You to Detail to the CMC Form

<table>
<thead>
<tr>
<th>On This Form</th>
<th>From This Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corres Requests Definition (CRRD)</td>
<td>Requested Correspondence</td>
</tr>
</tbody>
</table>

From the Communication Codes (CMC) form you can detail to the following forms:

Table 14: Detail Forms from the CMC Form

<table>
<thead>
<tr>
<th>From this field...</th>
<th>Detail to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Immediate Print Documents</td>
<td>Document Codes (DOC)</td>
</tr>
<tr>
<td>Special Actions</td>
<td>Corres Actions Definition (CRAD)</td>
</tr>
<tr>
<td>Correspondence Requests</td>
<td>Corres Requests Definition (CRRD)</td>
</tr>
<tr>
<td>Follow up on the Following Tracks</td>
<td>Tracking Codes (TRC)</td>
</tr>
</tbody>
</table>

## Triggering Other Actions

You can define communication codes that trigger other actions when you record the receipt of a piece of communication from an individual. For example, if you create a communication code for the receipt of an undergraduate application fee, you can define several actions that occur when you record the receipt of that fee from an individual. In this situation, you could trigger the following actions:

- send an acknowledgment letter to the individual by listing the document code for the acknowledgment letter as an immediate print document.
- update the individual’s status using a special action subroutine.
- add the individual to an undergraduate requirements track by listing the appropriate correspondence request code.
- remove the individual from a prospect follow-up track and add them to an applicant follow-up track by specifying the appropriate follow-up track codes.
These other actions can be simple or complex, depending on your institution’s requirements. Be sure to test your communication codes before using them in a live environment to make sure they yield the desired results.
Communication Code Naming Conventions

When naming communication codes, consider ending the code with the letter “C.” In many instances, it is desirable to name different types of codes similarly when you want to group like processing codes together. Ending the code name with a character signifying the type of code represented will greatly assist in avoiding confusion.

For example, Table 15 illustrates how related Communication Management codes could be named for clarity. An application sent to admissions applicants may be called 02APPD. The track associated with this document might be called 02APPT. The required items of a request could be called 02TRANSC, 02APPC, etc. The request itself could be called 02APPR.

Table 15: Example of Communication Management Code Naming Convention

<table>
<thead>
<tr>
<th>Code Type</th>
<th>Applicable Year</th>
<th>“Root” Code Name</th>
<th>Suffix</th>
<th>Full Code Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Code</td>
<td>2001/02</td>
<td>APP</td>
<td>D</td>
<td>02APPD</td>
</tr>
<tr>
<td>Tracking Code</td>
<td>2001/02</td>
<td>APP</td>
<td>T</td>
<td>02APPT</td>
</tr>
<tr>
<td>Communication Code</td>
<td>2001/02</td>
<td>APP</td>
<td>C</td>
<td>02APPC</td>
</tr>
<tr>
<td>Correspondence Requests</td>
<td>2001/02</td>
<td>APP</td>
<td>R</td>
<td>02APPR</td>
</tr>
</tbody>
</table>

Procedure for Defining Communication Codes

Use the appropriate worksheets starting on page 189 to plan the communication codes you want to create. Use the Communication Codes (CMC) form to create a profile of all expected incoming documents. Refer to online help for information specific to each field on the CMC form.
Recording Incoming Correspondence

In This Chapter

This chapter provides information for assigning communication codes and procedures for recording incoming correspondence for individuals and organizations.
Before You Begin

Before you record (or assign) incoming correspondence you should complete the actions in Table 16.

**Table 16: Information Needed Before You Assign Communication Codes**

<table>
<thead>
<tr>
<th>Action</th>
<th>Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand Communications Management concepts</td>
<td>“Overview of the Communications Management Module” beginning on page 23</td>
</tr>
<tr>
<td>Define your Communication Codes</td>
<td>“Defining Communication Codes” beginning on page 125</td>
</tr>
</tbody>
</table>
Understanding Communication Code Assignment

After you have created your communication codes, you can assign those codes to individuals in your system to record the receipt of incoming correspondence from the individual. For example, assume that you have created a communication code for an admissions application. When you receive an application from a prospective student, you would assign the code for the application to the individual’s record to indicate the fact that the prospect submitted an application.

Recording the receipt of a piece of correspondence or other information can trigger other actions for this individual, such as updating an individual’s status, sending a piece of outgoing correspondence, or assigning the individual to a follow-up track. These other actions are defined when the communication code is created. See “Defining Communication Codes” beginning on page 125 for more details about creating communication codes.

You can assign communication codes to individuals or to a group of individuals. Use Table 17 to determine which form to use when assign communication codes.

Table 17: Forms Used to Assign Communication Codes

<table>
<thead>
<tr>
<th>If you want to record correspondence from…</th>
<th>Use the…</th>
<th>See…</th>
</tr>
</thead>
<tbody>
<tr>
<td>an individual</td>
<td>Communication Code Entry (CRI) form</td>
<td>Figure 4-2</td>
</tr>
<tr>
<td>a group of individuals</td>
<td>Group Communication Entry (CRG) form</td>
<td>Figure 4-3</td>
</tr>
</tbody>
</table>

Use the Communication Code Entry (CRI) form to record correspondence received from an individual.
Use the Group Communication Entry (CRG) form to record correspondence received from a group of individuals.

**Figure 36:** The Communication Code Entry (CRI) Form

**Figure 37:** The Group Communication Entry (CRG) Form
Statues of Incoming Correspondence

Correspondence statuses are user-defined, but they use special processing to indicate whether the code indicates that the correspondence is received, waived, or incomplete. See your system administrator if you do not know which codes use specific special processing. Use the following table to determine which code to use when you record the receipt of correspondence.

**Table 18: Status Codes for Incoming Correspondence**

<table>
<thead>
<tr>
<th>If...</th>
<th>Then...</th>
</tr>
</thead>
<tbody>
<tr>
<td>The piece of correspondence you received is complete and correct</td>
<td>Enter a “received” status code.</td>
</tr>
<tr>
<td>The individual does not have to submit a specific piece of correspondence</td>
<td>Enter a “waived” status code.</td>
</tr>
<tr>
<td>You entered a communication code for an individual by mistake</td>
<td>Enter a “waived” status code. You cannot delete communication codes after they have been assigned to an individual.</td>
</tr>
<tr>
<td>The piece of correspondence you received is incomplete or incorrect</td>
<td>Enter an “incomplete” status code.</td>
</tr>
</tbody>
</table>
Procedure for Recording Incoming Correspondence: Individual Mode

Complete the following steps to record incoming correspondence from an individual.

**Step 1.** Access the Communication Code Entry (CRI) form.

**Step 2.** Select the default file suite year or enter another year.

**Step 3.** Access the record of the person for which you want to record incoming correspondence.

See the online help for more information about a specific field.

**Step 4.** Enter communication codes to record the pieces of correspondence received.

**Step 5.** For each communication code, define the status you want to set during processing (received, waived, or incomplete).

See page 2-1 for more information on correspondence status codes.

**Step 6.** Save the record.

When you save the record, the system updates the individual’s correspondence information and triggers any special actions.
Procedure for Recording Incoming Correspondence: Group Mode

Complete the following steps to record incoming correspondence from a group of individuals.

**Step 1.** Access the Group Communication Entry (CRG) form.

**Step 2.** Enter the list of communication codes that you want to process.

For each communication code, define the status you want to set during processing (received, waived, or incomplete).

See the online help for more information about a specific field.

**Step 3.** Enter the individuals for which you want to record the receipt of incoming correspondence.

You can specify the name of a saved list containing PERSON IDs, or you can enter a list of individual IDs.

**Step 4.** Save the record.

When you save the record, the system processes the batch request. You can choose to run this process in phantom mode.
Using Communications Management

Document Tracks
In This Chapter

This chapter provides information about document tracks and a procedure on how to define them. This chapter also provides recommended naming conventions for document tracks.

The next chapter provides instruction on how to assign document tracks to individuals or organizations in your database.

Before You Begin

Before you define document tracks you should complete the actions listed in Table 19.

Table 19: Information Needed Before You Define Document Tracks

<table>
<thead>
<tr>
<th>Action</th>
<th>Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand Communications Management concepts</td>
<td>“Overview of the Communications Management Module” beginning on page 23</td>
</tr>
<tr>
<td>Plan your tracking codes using the Tracking Codes worksheet</td>
<td>“Worksheets” beginning on page 189</td>
</tr>
<tr>
<td>Create the document codes you want to use in your document tracks</td>
<td>“Defining Document Codes” beginning on page 71</td>
</tr>
</tbody>
</table>
Understanding Document Tracks

Document tracks (also called Follow-up tracks) define a group of individual pieces of outgoing correspondence that you want to send to an individual. Document tracks are made up of documents created on the Document Codes (DOC) form. The record names given to document tracks are sometimes referred to as tracking codes.

You can assign a document track to any client in your database. When you assign a document track, Colleague creates a letter request record for each document on the track. Colleague calculates the print date for each letter based on the date information you enter when you define the track.

The Tracking Codes (TRC) form allows you to define a document track. A document track consists of a list of document codes and the exact or relative date on which you want to process each document.

**Figure 38: Tracking Codes (TRC) Form**

You can access the TRC form from the menu level or by detailing from the following forms:

**Table 20: Forms that Allow You to Detail to the TRC Form**

<table>
<thead>
<tr>
<th>On This Form</th>
<th>From This Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communication Codes (CMC)</td>
<td>Follow up on the Following Tracks</td>
</tr>
<tr>
<td>Corres Requests Assign Action (CRAA)</td>
<td>Assign the Following Tracks</td>
</tr>
</tbody>
</table>
From the Tracking Codes (TRC) form you can detail to the following form:

Table 20: Forms that Allow You to Detail to the TRC Form (cont’d)

<table>
<thead>
<tr>
<th>On This Form</th>
<th>From This Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corres Requests Follow Up (CRFU)</td>
<td>Follow up on the Following Tracks</td>
</tr>
<tr>
<td>Individual Tracking (ITR)</td>
<td>Tracks Currently Assigned</td>
</tr>
<tr>
<td>Group Track Assignment (GTA)</td>
<td>Tracks to Update</td>
</tr>
</tbody>
</table>

From the Tracking Codes (TRC) form you can detail to the following form:

Table 21: Detail Forms from the TRC Form

<table>
<thead>
<tr>
<th>From this field...</th>
<th>Detail to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send the Following Correspondence</td>
<td>Document Codes (DOC) form</td>
</tr>
</tbody>
</table>

**Adding Documents to the Track**

When you are creating or editing a document track, you can add one or more existing documents to the track. You can also access the DOC form as a detail form to create a new document or edit an existing document.

**Scheduling Documents for Processing**

You can specify when each document in the document track should be processed in one or both of the following ways:

- define the number of days after assigning the individual to the document track to wait before processing the document in the Days field.
- define the specific date on which the document should be processed in the By Date field.

For documents and tracks that you use on a regular basis, you should specify the number of days to wait rather than a specific date. For documents and tracks related to specific or one-time events, use a specific date to make sure the correspondence is processed on time.
Office Codes and Security

If you specify an office code for a document track when defining it on the TRC form, then only those staff members who are associated with that office can use that document track. All staff members can use document tracks that are not assigned to a specific office. Use the Staff and Volunteers (SVM) form to link staff members to one or more specific offices.

**Note:** Be aware that an office code is required when defining each document code.

Tracking Code Naming Conventions

When naming tracking codes, consider ending the code with the letter “T.” In many instances, it is desirable to name different types of codes similarly when you want to group like processing codes together. Ending the code name with a character signifying the type of code represented will help avoid confusion.

For example, table 5-12 illustrates how related Communication Management codes could be named for clarity. An application sent to admissions applicants may be called 02APPD. The track associated with this document might be called 02APPT. The required items of a request could be called 02TRANSC, 02APPC, etc. The request itself could be called 02APPR.

**Table 22: Example of Communication Code Naming Convention**

<table>
<thead>
<tr>
<th>Code Type</th>
<th>Applicable Year</th>
<th>“Root” Code Name</th>
<th>Suffix</th>
<th>Full Code Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Code</td>
<td>2001/02</td>
<td>APP</td>
<td>D</td>
<td>02APPD</td>
</tr>
<tr>
<td>Tracking Code</td>
<td>2001/02</td>
<td>APP</td>
<td>T</td>
<td>02APPT</td>
</tr>
<tr>
<td>Communication Code</td>
<td>2001/02</td>
<td>APP</td>
<td>C</td>
<td>02APPC</td>
</tr>
<tr>
<td>Correspondence Requests</td>
<td>2001/02</td>
<td>APP</td>
<td>R</td>
<td>02APPR</td>
</tr>
</tbody>
</table>
Procedure for Defining a Document Track

Complete the following steps to define your document tracks:

**Step 1.** Access the Tracking Codes (TRC) form.

**Step 2.** Define the tracking code.

At the LookUp prompt, enter the new code name and choose (A) to add.

Enter the description and office code in the appropriate fields.

See the online help for more information about a specific field.

**Step 3.** Add documents to the track.

You can choose existing documents or create documents on the fly. If you want to create documents to add to the track, detail to the DOC form.

**Step 4.** Save the record.
Assigning Document Tracks

In This Chapter

This chapter provides information on assigning document tracks, as well as procedures for assigning document tracks to individuals or organizations.

Information on how to define document tracks is provided in the previous chapter.

Before You Begin

Before you assign document tracks you should complete the actions listed in Table 23.

<table>
<thead>
<tr>
<th>Action</th>
<th>Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand Communications Management concepts</td>
<td>“Overview of the Communications Management Module” beginning on page 23</td>
</tr>
<tr>
<td>Create the document tracks that you want to use</td>
<td>“Defining Document Tracks” beginning on page 141</td>
</tr>
<tr>
<td>Determine the individuals that you want to assign to the track</td>
<td></td>
</tr>
</tbody>
</table>
Understanding Document Track Assignment

You can assign a document track to any individual or organization in your database. When you assign a document track, Colleague creates a letter request record for each document on the document track. Colleague calculates the print date for each letter based on the date information you enter when you define the track.

You can assign document tracks to individuals in many ways. The simplest way to assign tracks is to manually assign tracks in either individual or group mode. Other processes, such as recording the receipt of a piece of correspondence, can automatically add, remove, or reset a document track for an individual.

To assign or maintain tracks for individuals, use the Individual Tracking (ITR) form. To assign or maintain tracks for groups of individuals, use the Group Track Assignment (GTA) form.

Track Assignment Actions

When you are assigning document tracks in group mode, you must specify the action that you want to take place for each track, as follows:

- **Add** - This action adds all individuals in the group to the associated track.
- **Delete** - This action removes all individuals in the group from the associated track.
- **Reset** - This action resets the associated track’s schedule of document processing for all individuals in the group.

Track assignment actions do not apply when assigning tracks individually using the ITR form.
Procedure for Assigning a Document Track: Individual Mode

Complete the following steps to assign document tracks to an individual.

**Step 1.** Access the record for the individual to whom you want to assign the track.

For each document track, define the action you want to occur during processing (add, delete, or reset).

See the online help for more information about a specific field.

**Step 2.** Add one or more document tracks for this individual.

If there are any existing document tracks currently assigned to this individual, you can view or modify them on this form.

**Step 3.** Save the record.

When you save the record, the system assigns the track to the individual.
Procedure for Assigning a Document Track: Group Mode

Complete the following steps to assign document tracks to a group.

**Step 1.** Access the Group Track Assignment (GTA) form.

**Step 2.** Select the default file suite year or enter another year.

**Step 3.** Enter the list of document tracks that you want to process.

For each document track, define the action you want to occur during processing (add, delete, or reset).

See the online help for more information about a specific field.

**Step 4.** Define the individuals for which you want to process the document track assignments.

You can specify the name of a saved list containing PERSON IDs, or you can enter a list of individual IDs.

**Step 5.** Save the record.

When you save the record, the system processes the batch request. You can choose to run this process in phantom mode.
Using Communications Management

Correspondence Request
Tracks
Defining Correspondence Request Tracks

In This Chapter

This chapter provides overview information for correspondence request tracks as well as a procedure for defining request tracks.
Before You Begin

Before you define correspondence request tracks, you should complete the actions listed in Table 24.

Table 24: Information Needed Before You Define Correspondence Request Tracks

<table>
<thead>
<tr>
<th>Action</th>
<th>Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand Communications</td>
<td>“Overview of the Communications Management Module” beginning on page 23</td>
</tr>
<tr>
<td>Management concepts</td>
<td></td>
</tr>
<tr>
<td>Define your communication</td>
<td>“Defining Communication Codes” beginning on page 125</td>
</tr>
<tr>
<td>codes</td>
<td></td>
</tr>
</tbody>
</table>
Understanding Correspondence Request Tracks

Correspondence request tracks define a group of individual pieces of incoming correspondence that you want to receive from an individual. These tracks are also called “requirement tracks” because they request a series of correspondence from an individual. Correspondence request tracks are made up of communication codes created on the Communication Codes (CMC) form.

You can assign a correspondence request track to any client in your database. When you assign a correspondence request track to an individual, Colleague creates a list of required incoming correspondence for that individual.

Use the Corres Requests Definition (CRRD) form to define a correspondence request track.

**Figure 39: Correspondence Requests Definition (CRRD) Form**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Req</th>
<th>Rules</th>
<th>Instance Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADMAPP</td>
<td>Admissions Application</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RESM</td>
<td>Residency Certification</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HISTRAN</td>
<td>High School Transcript</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BUSIQ</td>
<td>Business School Inquiry</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>COLTRANS</td>
<td>College Transcripts</td>
<td>Yes</td>
<td></td>
<td>COLTRANS</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Assignment Actions: No
Follow up Actions: Yes
You can access the CRRD form from the menu or as a detail form from the following forms:

**Table 25: Forms that Allow You to Detail to the CRRD Form**

<table>
<thead>
<tr>
<th>On This Form</th>
<th>From This Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communication Codes (CMC)</td>
<td>Correspondence Requests</td>
</tr>
<tr>
<td>Corres Requests Assign Action (CRAA)</td>
<td>Correspondence Requests</td>
</tr>
<tr>
<td>Corres Requests Follow Up (CRFU)</td>
<td>Correspondence Requests</td>
</tr>
</tbody>
</table>

From the Correspondence Requests Definition (CRRD) form you can detail to the following forms:

**Table 26: Detail Forms from the CRRD Form**

<table>
<thead>
<tr>
<th>From this field...</th>
<th>Detail to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requested Correspondence</td>
<td>Communication Codes (CMC) form</td>
</tr>
<tr>
<td>Rules</td>
<td>Rules Definition (RLDE) form</td>
</tr>
<tr>
<td>Instance Action</td>
<td>Corres Actions Definition (CRAD) form</td>
</tr>
<tr>
<td>Assignment Actions</td>
<td>Corres Requests Assign Actions (CRAA) form</td>
</tr>
<tr>
<td>Follow up Actions</td>
<td>Corres Requests Follow Up (CRFU) form</td>
</tr>
</tbody>
</table>

**Required Communication Codes**

You can include communication codes in this correspondence request that are not required. However, when you assign this correspondence request to an individual, only those codes marked as required are evaluated for any triggers that may be defined within the communication code.

**Rules**

For each communication code you list in this correspondence request, you can use rules to determine whether the code is required for each individual, based on the characteristics of that individual’s record at the time of evaluation. This is a more sophisticated method of determining whether a communication code is required than simply specifying “Yes” in the Required field.
Instance Actions

For each communication code you list in this correspondence request, you can specify a specific action (an instance action type) subroutine that is activated when this piece of communication is received. Use the CRAD form to define correspondence actions. You can access the CRAD form as a detail form from the CRRD form. See “Communications Management Parameters” beginning on page 53 for more information about defining correspondence actions.

Assignment Actions

You can define assignment actions that should take place when this correspondence request is initially assigned to an individual. To define assignment actions, use the CRAA form. You can access the CRAA form as a detail form from the CRRD form.

Follow-Up Actions

You can define follow-up actions that should take place when all required pieces of communication in this correspondence request are fulfilled. To define follow-up actions, use the CRFU form. You can access the CRFU form as a detail form from the CRRD form.

Correspondence Request Track Naming Conventions

When naming correspondence request tracks, consider ending the end code with the letter “R.” In many instances, it is desirable to name different types of codes similarly when you want to group like processing codes together. Ending the code name with a character signifying the type of code represented will greatly assist in avoiding confusion.
For example, table Figure 27 illustrates how related Communication Management codes could be named for clarity. An application sent to admissions applicants may be called 02APPD. The track associated with this document might be called 02APPT. The required items of a request could be called 02TRANSC, 02APPC, etc. The request itself could be called 02APPR.

Table 27: Example of Communication Management Code Naming Convention

<table>
<thead>
<tr>
<th>Code Type</th>
<th>Applicable Year</th>
<th>“Root” Code Name</th>
<th>Suffix</th>
<th>Full Code Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Code</td>
<td>2001/02</td>
<td>APP</td>
<td>D</td>
<td>02APPD</td>
</tr>
<tr>
<td>Tracking Code (document track)</td>
<td>2001/02</td>
<td>APP</td>
<td>T</td>
<td>02APPT</td>
</tr>
<tr>
<td>Communication Code</td>
<td>2001/02</td>
<td>APP</td>
<td>C</td>
<td>02APPC</td>
</tr>
<tr>
<td>Correspondence Requests</td>
<td>2001/02</td>
<td>APP</td>
<td>R</td>
<td>02APPR</td>
</tr>
</tbody>
</table>
Procedure for Defining a Correspondence Request Track

Step 1. Access the Corres Requests Definition (CRRD) form.

Step 2. Define the correspondence request track code.

At the LookUp prompt, enter the new code name and choose (A) to add.

Enter the description and office code in the appropriate fields. See the online help for more information about a specific field.

Step 3. Add communication codes to the correspondence request track.

You can choose existing communication codes or create new ones on the fly. To create new communication codes, detail to the CMC form.

To mark this communication code as required for this track, enter Y in the Required field for the code.

To use rules to determine when this code is required for an individual, enter an existing rule in the Rules field. To create and use a new rule, detail to the Rules Definition (RLDE) form.

To specify an instance action subroutine that is activated when this piece of correspondence is received, enter an existing instance action subroutine in the Instance Action field. To create and use a new subroutine, detail to the CRAD form.

For more information about creating communication codes, see page 4-1.

For more information about creating correspondence action subroutines, see page 2-7.

Step 4. Specify any follow-up or assignment actions for this correspondence request.

You can detail to the CRAA form to specify assignment actions.

You can detail to the CRFU form to specify follow-up actions.
Step 5. Save the record.
Assigning Correspondence Request Tracks

In This Chapter

This chapter provides overview information for assigning correspondence request tracks to a client in your database. In addition, this chapter provides procedures for assigning correspondence request tracks to an individual or a group.

Before You Begin

Before you assign correspondence request tracks (requirements tracks) you should complete the actions listed in Table 28.

Table 28: Information Needed Before You Assign Correspondence Request Tracks

<table>
<thead>
<tr>
<th>Action</th>
<th>Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand Communications Management concepts</td>
<td>“Overview of the Communications Management Module” beginning on page 23</td>
</tr>
<tr>
<td>Define your correspondence request tracks</td>
<td>“Defining Correspondence Request Tracks” beginning on page 153</td>
</tr>
</tbody>
</table>
Understanding Correspondence Request Track Assignment

Correspondence request tracks define a group of individual pieces of incoming correspondence that you want to receive from an individual. You can assign a correspondence request track to any client in your database. When you assign a correspondence request track to an individual, Colleague creates a list of required incoming correspondence for that individual.

You can assign correspondence request tracks individually or to groups of individuals.

Use the Individual Requests (IRQ) form to assign one or more correspondence request tracks to an individual. Use the Corres Request Assignment (CRA) form to assign correspondence request tracks in group mode.

Rules

When assigning correspondence request tracks in group mode, you can use rules to determine whether to process the assignment for an individual based on the characteristics of that individual’s record at the time of evaluation. This is a more sophisticated method of determining whether a track should be assigned to an individual.

Track Assignment Actions

When you assign correspondence request tracks in group mode, you must specify the action that you want to take place for each track, as follows:

- Add - This action adds all individuals in the group to the associated track.
- Delete - This action removes all individuals in the group from the associated track.

Note: You cannot choose the Reset option for assigning correspondence request tracks. This option applies only to document track assignment.
Procedure for Assigning Correspondence Request Tracks: Individual Mode

Complete the following steps to assign correspondence request tracks to an individual:

**Step 1.** Access the Individual for whom you want to assign a correspondence request track on the Individual Requests (IRQ) form.

See the online help for more information about a specific field.

**Step 2.** Select the default file suite year or enter another year.

**Step 3.** In the Correspondence Received Requests field, list the correspondence request tracks that you want to assign to this individual.

You can detail to the Individual Requests By Track (IRT) form to view the communication codes and triggers defined in a particular correspondence request track.

The IRQ form also displays any correspondence request tracks currently assigned to an individual. You can add to or modify this list as needed.

For procedures on creating correspondence request tracks, see 154.

**Step 4.** Save the record.

When you save the record, this individual is added to the listed correspondence request tracks.
Procedure for Assigning Correspondence Request Tracks: Group Mode

Complete the following steps to assign correspondence request tracks to a group:

**Step 1.** Access the Corres Request Assignment (CRA) form.

See the online help for more information about a specific field.

Select the default file suite year or enter another year.

**Step 2.** In the Rules field, specify or create any rules you want to use when assigning correspondence request tracks.

You can detail to the Rules Definition (RLDE) form to create rules.

If you list more than one rule here, you must define the association of the rules in the Rules Operator field.

**Step 3.** In the Correspondence Requests field, list the correspondence request tracks that you want to assign.

You can detail to the CRRD form to create new correspondence request tracks.

To add individuals to a correspondence request track, enter A in the Action field for the associated track. To remove individuals from a correspondence request track, enter D in the Action field for the associated track. You cannot reset a correspondence request track for individuals.

For more information about creating correspondence request tracks, see page 154.

**Step 4.** Specify the individuals that you want to assign to or remove from the correspondence request tracks listed.

You can specify a saved list of PERSON IDs or list individual PERSON IDs on this form.
Step 5. Save the record.

When you save the record, the individuals listed are automatically added to or removed from the correspondence request tracks, as specified.

You can view the correspondence request tracks currently assigned to an individual using the Individual Requests (IRQ) form.
Using Communications Management

Correspondence Processing
Processing Pending Correspondence

In This Chapter

This chapter provides information on pending correspondence and procedures for viewing correspondence. This chapter also provides information on how to process and delete multiple pending correspondence.

In addition, this chapter provides information about express correspondence processing and clearing any errors that occurred while processing pending correspondence.
Understanding Correspondence Processing

When a piece of outgoing correspondence is assigned to an individual, a letter request record is created. The letter request contains all of the information needed to process, or produce, the piece of correspondence. All correspondence is considered pending until it is processed as described in this chapter.

You can view all pending correspondence using the View Pending Correspondence (VPC) form.

**Figure 40: View Pending Correspondence (VPC) Form**

<table>
<thead>
<tr>
<th>Document</th>
<th>Type Name</th>
<th>Date</th>
<th>Unproof Count</th>
<th>Proof Count</th>
<th>Errors Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>91</td>
<td>CINDY</td>
<td>05/03/07</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>92</td>
<td>FACCHGST</td>
<td>05/03/07</td>
<td>2</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>93</td>
<td>GIFTACK</td>
<td>05/08/07</td>
<td>10</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>94</td>
<td>IADAFACK</td>
<td>05/03/07</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>95</td>
<td>OVER100</td>
<td>05/08/07</td>
<td>15</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

The VPC form also lists correspondence that has already been processed but not deleted.

**Technical Tip:** You may need to re-index the file LTR.GRP if you experience difficulties on this form.
Batch Processing

All pending correspondence can be processed in batches so that you can process many letter requests at one time. The correspondence batch process ensures that all pending correspondence meeting your selection criteria is selected and processed. Batches of correspondence are created and processed on the Process Correspondence Batch (PCB) form.

**Figure 41:** The Process Correspondence Batch (PCB) Form

<table>
<thead>
<tr>
<th>Document Groups to be processed</th>
<th>Name</th>
<th>Print Dt</th>
<th>Select Count</th>
<th>Process Count</th>
<th>Error Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 CHC_CFYR</td>
<td>EMAIL</td>
<td>12/02/10</td>
<td>1</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Each batch represents one specific group of correspondence. If any pieces of correspondence in a batch are not processed due to errors, you can re-process only the unprocessed pieces.

Additional information about the batches created on the PCB form can be entered on the Process Corres. Print Options (PCBP) form.
On the PCBP form, you may specify whether to run the batch as a phantom, update the history for the records, or print envelopes with the documents. On this form you can also indicate whether to recalculate and update the letter requests through the Recalculate Letter Data field. Accordingly, Colleague recalculates the data in the LTREQ file while processing the batch.

In the Comm Code field on PCBP, enter the communication codes to assign to each individual processed in the batch. In the Status field, enter the status that will be associated with the communication code in the mailing history. You can enter these codes at any time, but they are used only during the Update History step.

When history is updated for the batch, the Communication Codes and the history (using the options specified for the document) are updated for each person to whom communications are addressed. This means when a person's correspondence history is updated, the history of their joint mail partner is also updated if it is a joint mailing, even if only one person in the relationship is originally selected. Also, in the case of acknowledgements, if the acknowledgement is for a group, the history of all persons in the group is updated. The group list is in LTREQ.HISTORY.PERS0N.IDS field.

The Mail Type field accepts a code for the mail type to determine how joint mail relationships in this batch should be processed. The default mail type in this field is I-Individual, but you can change it to enter a joint mail type such as J-Joint, which would indicate that the relationship is a joint mailing.

The Process Corres. Print Options (PCBP) Form

![PCBP Form Diagram]

**Figure 42:** The Process Corres. Print Options (PCBP) Form

[Diagram of PCBP form showing fields for Batch Name, Recalculate Letter Data, Update History, Comm Code/Status, Mail Type, and options for Print Options and Batch Control Parameters.]
as JMB- Joint Mail (Both), JME-Joint Mail (Either), or JSB-Joint Solicit (Both). During correspondence processing, Colleague determines the required mail type from various sources in the following sequence:

1. From the letter request.
2. From the value in this field if no mail type can be determined from the letter request.
3. From the document if no mail type can be determined from the value in this field.
4. After checking all the above, if Colleague still cannot determine the mail type, it assigns “I” as the default mail type.

The Update Pending Addresses field on PCBP enables you to specify whether any pending addresses should be updated before processing the correspondence. If you enter Y, Colleague processes all pending addresses that are effective on or before the current date, and also updates any addresses in the database that have expired before the current date so that the document uses each person’s most current address. Colleague does not automatically update the addresses when the effective date arrives. Instead, a system administrator must run the Pending Address Update (PADU) process to update the pending addresses so that Colleague can use the updated addresses. This flag ensures that even if the PADU process is not run, all addresses on your system are current. For more information about the PCBP form, see the online help.

You can also create or process only pending letter requests for a particular document and print date through the Express Corresp. Processing (PCEX) form.

You can also delete multiple letter batches using the Batch Delete LTREQ Records (DLTR) process. The DLTR process is especially helpful if you assigned items for printing in error or if you process a letter batch with errors and you want to remove the erroneous LTREQ records instead of reprocessing them. After running the DLTR process, it might be necessary to rebuild any cross-references. All cross-references and indexes are correctly updated when the DLTR process deletes the LTREQ records.

You should run batches on a regular basis to ensure that all correspondence is processed and mailed promptly. Regular processing is particularly important if your institution generates a large volume of correspondence or uses correspondence request tracking, correspondence rules, or document tracking extensively.
You can create templates for batches of correspondence that you process on a regular basis, such as acknowledgment letters. These templates store default values for batches so that you can create each individual batch easily and quickly. Use the Batch Procedure Definition (PBD) form to create batch templates.
Building and Processing Letter Requests

Use the Express Corresp Processing (PCEX) form to quickly create and process letter requests for a list of persons for a particular document and print date. The PCEX process is an easy way to create letter requests because you do not need to assign documents or document tracks to the persons, and you do not need to do any subsequent cleanup.

You can also use this form to create or process only pending letter requests for a particular document and print date. You can perform either or both of the above steps in one run of the process.

You can use the PCEX form to create or edit a document. When the PCEX form is used to process letter requests, a letter batch is created, documents are generated, history is updated, and successfully processed letter requests and the letter batch are automatically deleted in a single run of the process. The PCEX form is displayed below.

**Figure 43:** Express Corresp Processing (PCEX) Form
If you decide to build and process letter requests at the same time, Colleague processes all the letter requests created in the first step, and also, any pending letter requests for the same document or print date that are not already assigned to a batch.

The PCEX process builds and processes letter requests for the document and print date that you specify. The PCEX form enables you to enter various optional parameters for the letter request batch, which correspond to values entered on the Process Correspondence Batch (PCB) and Process Corres Print Options (PCBP) forms. While processing letter requests, the PCEX process creates the same type of correspondence batch as created by the PCB process.

**Noteworthy Fields on the PCEX Form**

Several fields on the PCEX form have default values based on the selected document, but you can override them. This section briefly describes some of the fields on the PCEX form.

**Build Letter Requests**

Enter a value to indicate whether to build the specified letter requests. If you enter **Yes**, a letter request is built for all the persons included in the saved list, in the list of person IDs, or in the list of persons you specify with the additional selection criteria. Each letter request is built for the specified document and print date.

**Process Letter Requests**

Enter a value to indicate whether to process letter requests for the document and print date. If you enter **Yes**, all letter requests for the specified document and print date are processed. If you entered **Yes** in the Build Letter Requests field, the processing includes all the letter requests built, in addition to any preexisting letter requests that qualify.

**Activity**

If these letter requests are associated with a particular campaign, enter the campaign ID here.
Mail Type

Enter a code for the mail type to indicate whether the documents specified in the letter batch are to be mailed individually or jointly. The default mail type is Individual, but you can change it to enter a joint mail type of Joint Mail (Both), Joint Mail (Either), Joint Solicit (Either), or Joint Solicit (Both). If you specify a joint mail type, but an individual being processed is not set up for joint mail, then that person will be mailed to individually.

Envelope Document/Print

Enter a document to print envelopes. You can select a document that will be processed along with the main document, to print envelopes for the main document. The envelope document specified here is merged with the same person or LTREQ record that is used with the main document. An envelope document group is printed as each main document group is processed.

Letter Request Sort

Use this group of two fields to sort the letter requests that you are currently processing. In the first field, select the LTREQ field on which to sort, and in the second field, select the sort direction.

Correcting Errors and Customizing Correspondence

During batch processing, you may encounter errors with specific pieces of correspondence that you need to resolve before they can be processed. You can see the status of the batch process using the Pending Correspondence Detail Report (PCR). You may also want to customize specific pieces of correspondence. You can add custom text, add a custom salutation, or change the address type for a specific correspondence request using the Individual Pending Corres (IPC) form. If the process is not successful, you can complete processing of the temporary letter batch that is created by PCEX using the restart provisions provided on PCB.
Procedure for Processing Existing Correspondence

Complete the following steps to process pending correspondence.

Step 1. Access the View Pending Correspondence (VPC) form to see the list of all correspondence requests that have not yet been processed.

See the online help for more information about a specific field.

Step 2. Run the Pending Correspondence Detail Report (PCR) to view the list of individuals that will be receiving each document.

You can list one or more document codes to include in the report. You can run this report for a specific time period. See the online help for more information about a specific field.

Step 3. Correct any errors shown on the report.

You can add custom text, add a custom salutation, or change the address type for a specific correspondence request using the Individual Pending Correspondence (IPC) form.

Note: Changes to custom text will be overwritten if you entered “Yes” in the Recalculate Paragraphs field on the DOCP form.

Step 4. Create a batch of all pieces of correspondence that you want to process together.

Use the Process Correspondence Batch (PCB) form to create a new batch or edit an existing one.

Note: You can use the Batch Delete LTREQ Records (DLTR) process to delete multiple letter batches.

You can create batches based on document code, printer, paper type, or any other logical grouping.

Use the Batch Procedure Definition (BPD) form to create a general template to use when creating batches.
Step 5. To process the batch, from the PCB form, enter C in the Action field to count the letter request records to be processed.

Step 6. From the PCB form, enter P in the Action field to select the records and process the batch. Action S can be used to select a subset of the whole batch for processing.

Note: If you are using a COQT document type, use the Transfer PC File (TPF) to download the file from Colleague to the PC or network drive, then use Word’s Mail Merge Helper to combine the COQT file with the merge document on Word and print or save them to print at a later time.

If you do not have access to TPF, you can use any FTP program to download the file.

Correct any errors and reprocess any unprocessed requests.

Run the Pending Correspondence Detail Report (PCR) to view details of any errors.

Repeat these processing steps until all errors are resolved.

Step 7. Create your printed documents, if necessary.

If any documents in the batch were a “W” document type, those documents were printed during batch processing.

Step 8. Update history for the correspondence in the batch, if necessary.

From the PCB form, enter H in the Action field to update the history of all processed correspondence in the batch. The document history for some documents may have been updated automatically during processing.

Use the Individual History (IHS) form to view the history of all documents sent to an individual.

Note: For email, the author may receive an email delivery confirmation report that the email was not successfully sent; however, history is updated anyway.
**Step 9.** Delete the batch by entering X in the Action field to delete the batch on the PCB form.

Deleting the batch saves disk space by removing saved lists and all completed letter request records. Make sure that all pieces of correspondence are processed before deleting the batch.

**Procedure for Building and Processing Correspondence in Single Step**

Follow the steps below to create or process correspondence in one step.

**Step 1.** Access the Express Corresp. Processing (PCEX) form.

**Step 2.** Enter the parameters for the letter request processing, as needed.

Indicate whether you want to build the letter requests and run the process in Update mode or Report-only mode. Enter any saved list names, or additional selection criteria, as needed.

**Step 3.** Update out of the PCEX form.

For more information about the PCEX form, see the online help.
Processing from a Saved List

To use “selection criteria” or a saved list to process a document for a group of people, use the Document Merge Processing (DMP) form. Saved lists and selection criteria are applied to the file named in the Merge File field. For example, if you are processing records from the PERSON file, the saved list should contain PERSON IDs. If you are processing the PERSON file using selection criteria, you can specify any valid database query language statement, but you may use only valid dictionary items for the PERSON file.

**Figure 44: Document Merge Processing (DMP) Form**
Procedure for Clearing Errors

You can use the following procedure if you are using the PCB process. To clear errors, access the Saved List Inquiry (SVI) form.

**ALERT!** Use this procedure only if you are creating hardcopy letters or labels. Datatel does not recommend this if you are processing e-mails because the e-mails would be sent each time the process is run.

**Figure 45:** Saved List Inquiry (SVI) Form

<table>
<thead>
<tr>
<th>Saved Lists List Name</th>
<th>Document Description</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 APPLDATA_MASTER</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 APPLDATA_ACTIVE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 APPLDATA_ACC LTR</td>
<td>Acceptance Letter</td>
<td>ASCII</td>
</tr>
<tr>
<td>4 APPLDATA_ACC LTR_PERSON</td>
<td>Acceptance Letter</td>
<td>ASCII</td>
</tr>
<tr>
<td>5 APPLDATA_ACC LTR_16803_ERROR8</td>
<td>Acceptance Letter</td>
<td>ASCII</td>
</tr>
<tr>
<td>6 APPLDATA_CAT</td>
<td>Course Catalog</td>
<td>L</td>
</tr>
<tr>
<td>7 APPLDATA_CAT_PERSON</td>
<td>Course Catalog</td>
<td>L</td>
</tr>
<tr>
<td>8 APPLDATA_HOUS</td>
<td>Housing Letter</td>
<td>WPMO</td>
</tr>
<tr>
<td>9 APPLDATA_HOUS_PERSON</td>
<td>Housing Letter</td>
<td>WPMO</td>
</tr>
<tr>
<td>10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Step 1.** At the Batch Process LookUp, type @ to recall the batch you were working on in PCB.

**Step 2.** Position the cursor on the line that includes the word “ERROR” and detail to the Saved List Inquiry Detail (SVID) form.
The SVID form displays the ID numbers and names of individuals with errors.

**Figure 46: Saved List Inquiry Detail (SVID) Form**

![SVID form screenshot]

**Step 3.** Note the ID numbers (not the key) of the records with errors (print the form if the list is long).

**Step 4.** Exit from the SVID and the SVI forms.
Step 5. Access the Name and Address Entry (NAE) form to check for missing or invalid information on each record.

Step 6. Make any necessary corrections. If you find nothing to correct, the problem may have already been resolved but is not reflected in the pending correspondence; in this case, the next step will resolve the error.
Step 7. Access the Individual Pending Corres (IPC) form.

Step 8. In the Pending Correspondence Summary field, position the cursor on the document that contains the error.

Step 9. Delete the document, then re-enter the same document.

Step 10. Position the cursor on a blank line and detail.
The Individual Pending Corres Detail (IPCD) form displays.

**Figure 47:** Individual Pending Corres Det (IPCD) Form

**Step 11.** Enter the document name and the print date (within the date range that you are processing), then save from the IPCD form.

**Step 12.** Verify that the document has been successfully re-entered on the IPC form, then save from the IPC form.

**Step 13.** Access the Process Correspondence Batch (PCB) form. Type @ to recall the batch on which you were working.

**Step 14.** Select U for Action to run the Unselect process.

**Step 15.** When you access the PCB form, the batch name will no longer exist and you will need to recreate the form entries (that is, Select Start Date, Select End Date, and so on.). You will need to run the Select Action on the PCB form again to re-select the records and then verify that the errors have been cleared.
Using Communications Management

Appendix
Worksheets

In This Appendix

This appendix provides worksheets that you can use to assist you in setting up the Communications Management module.

Table 29: Worksheets for Setting Up the Communications Management Module

<table>
<thead>
<tr>
<th>Worksheet</th>
<th>Procedure Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Codes</td>
<td>“Defining Document Codes” beginning on page 71</td>
</tr>
<tr>
<td>Communication Codes</td>
<td>“Defining Communication Codes” beginning on page 125</td>
</tr>
<tr>
<td>Tracking Codes</td>
<td>“Defining Document Tracks” beginning on page 141</td>
</tr>
<tr>
<td>Correspondence Requests</td>
<td>“Defining Correspondence Request Tracks” beginning on page 153</td>
</tr>
<tr>
<td>Validation Code Tables</td>
<td>“Communications Management Codes” beginning on page 43</td>
</tr>
</tbody>
</table>
## Document Codes

**Table 30:** Document Codes Worksheet

<table>
<thead>
<tr>
<th>Document Code</th>
<th>Outgoing Correspondence Information Description</th>
<th>Office</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>
## Communication Codes

**Table 31:** Communication Codes Worksheet

<table>
<thead>
<tr>
<th>Communication Code</th>
<th>Incoming Correspondence Information Description</th>
<th>Office</th>
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</tbody>
</table>
## Tracking Codes

### Table 32: Tracking Codes Worksheet

<table>
<thead>
<tr>
<th>Tracking Code:</th>
<th>Office:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Documents</td>
<td>Days</td>
</tr>
<tr>
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</table>

### Table 33: Tracking Codes Worksheet

<table>
<thead>
<tr>
<th>Tracking Code:</th>
<th>Office:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Documents</td>
<td>Days</td>
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</tbody>
</table>
### Communication Codes

**Table 34: Communication Codes Worksheet**

<table>
<thead>
<tr>
<th>Communication Code:</th>
<th>Office:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Immediate Print Documents</td>
<td></td>
</tr>
<tr>
<td>Special Actions</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Correspondence Requests</th>
<th>Follow-up Tracks</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Code</strong></td>
<td><strong>Action</strong></td>
</tr>
<tr>
<td>Add</td>
<td>Delete</td>
</tr>
<tr>
<td>Add</td>
<td>Delete</td>
</tr>
<tr>
<td>Add</td>
<td>Delete</td>
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<tr>
<td>Add</td>
<td>Delete</td>
</tr>
<tr>
<td>Add</td>
<td>Delete</td>
</tr>
</tbody>
</table>
**Table 34: Communication Codes Worksheet**

<table>
<thead>
<tr>
<th>Communication Code:</th>
<th>Office:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add</td>
<td>Delete</td>
</tr>
<tr>
<td>Add</td>
<td>Delete</td>
</tr>
</tbody>
</table>
## Correspondence Requests

### Table 35: Correspondence Requests Worksheet

<table>
<thead>
<tr>
<th>Correspondence Requests Code:</th>
<th>Office:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requested Correspondence</td>
<td></td>
</tr>
<tr>
<td>Communications Code</td>
<td>Required</td>
</tr>
<tr>
<td>--------------------------</td>
<td>----------</td>
</tr>
<tr>
<td></td>
<td>Yes  No</td>
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<td>Yes  No</td>
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<td>Yes  No</td>
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</tbody>
</table>
Validation Code Tables

Use a copy of this worksheet to list all the validation code tables you define for the Communications Management module.

**Table 36: Validation Code Tables Worksheet**

<table>
<thead>
<tr>
<th>Code Table Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
</tr>
<tr>
<td>------</td>
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</table>
Table 36: Validation Code Tables Worksheet

<table>
<thead>
<tr>
<th>Code Table Name:</th>
<th>Code</th>
<th>Description</th>
<th>Min Entry</th>
<th>Special Processing</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
</tr>
</tbody>
</table>
Using Communications Management

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