

Student Information Systems



Communications Mgmt Module



Procedure Manual



South Dakota Colleague System Procedures

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Revisions with this Update

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Preface

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Colleague System Instructions

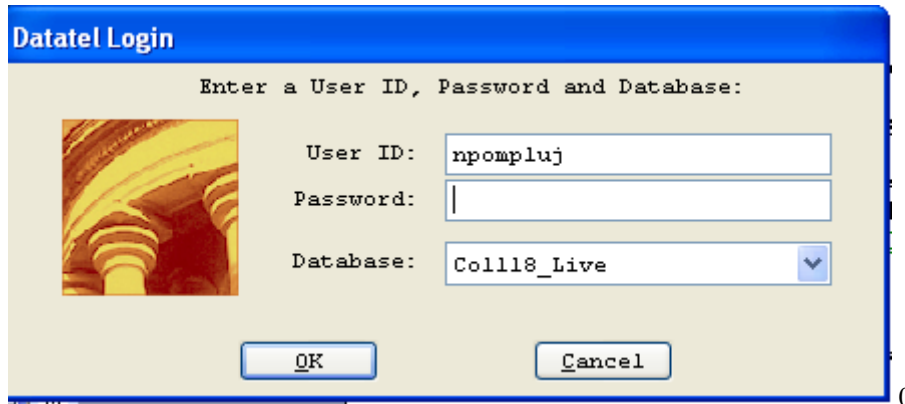
Responsibility: University

Colleague Access

Accessing Colleague from Windows

- Select the **START** button on the taskbar.
 - Select **PROGRAMS** from the start menu.
 - Select **DATATEL** from the **PROGRAMS** options.
 - Select **UI Desktop** from the **DATATEL** options.
- or
- Select the desktop **Datatel** icon.

A wIntegrate screen will display briefly followed by the Colleague Logon screen as shown below.



Datatel Login

Enter a User ID, Password and Database:

User ID: npompluj

Password: |

Database: Coll18_Live

OK Cancel

Logging On/Off & Changing Password

- Enter your Colleague ID in lower case letters at the login prompt and press enter.
- Enter the password at the password prompt. See the Rules for Password section of the document for changing passwords.

If either the login ID or login password is entered incorrectly, the login prompt will re-display. After 3 unsuccessful tries, the login ID will be locked and must be reset. Send an email to **your university system administrator**.

Select Coll18_Live for the Production Account or Coll18_Test for the Test Account.

Click on OK.

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Change Password

- Select the **START** button on the taskbar.
 - Select **PROGRAMS** from the start menu.
 - Select **DATATEL** from the **PROGRAMS** options.
 - Select **DATATEL Terminal** from the **COMMUNICATIONS** options.
- or
- Select the desktop **Datatel Terminal** icon.

The following screen will be displayed for the change of password.

<p>Main Menu</p> <ol style="list-style-type: none">1. Live Account2. Change Password3. Log Off <p>Enter your selection[1-10]: 2</p> <p>Changing password for "userid"</p> <p>userid's Old password:</p> <p>userid's New password:</p> <p>Enter the new password again:</p>
--

- Enter userid's old password
- Enter userid's new password
- Re-enter userid's new password

A message will display confirming that the password has been changed.

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Rules for passwords are:

- a) The password must be a minimum of six characters long.
- b) The password must contain two characters and two numbers.
- c) The password must have two alpha/numeric characters not in the previous password.
- d) The password can not have more than two repeating characters.
- e) The password only recognizes the first eight characters, but a password can contain 256 characters.
- f) Passwords can not contain these characters: () * ? < > / ; & ! [] { } | \$ \ ' ")
- g) The password is case sensitive.

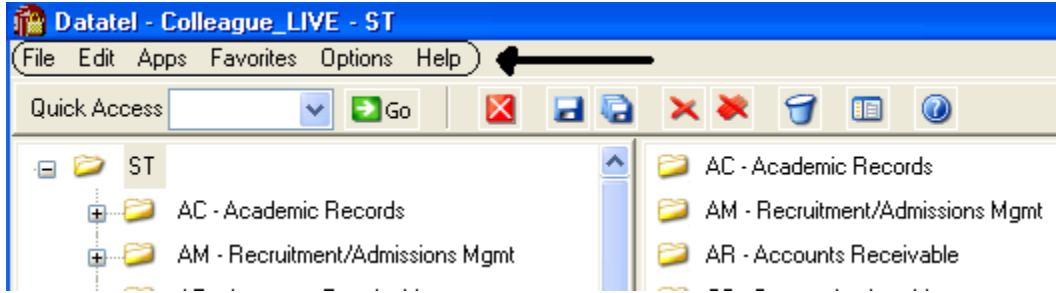
Password Change Requirements

- a) Users will be required to change password every 20 weeks. After the 18th week, users will be notified that their password will need to be changed soon. They will then have those two weeks plus an additional two weeks grace period to make that change. Total time lapse for a password is 20 weeks.
- b) The account will be locked if no change is made to a password after the grace period. To reset the account, send an email to **your university system administrator**.
- c) When a user is requested to change password upon login to Colleague, they **MUST** do so. Failure to comply will result in being locked out of the system after the fifth try. However, while trying to change password, the user is given several tries to meet the password criteria until they are successful. If the user gets locked out, send an email to **your university system administrator** to have the ID reset.
- d) When a user receives the message to change their password, they will have 60 seconds to begin typing before they are disconnected – but not locked out.
- e) Passwords cannot be reused immediately. There is a 26-week wait period before a password can be recycled. Even then, the password cannot have been used within the last two iterations.

If you are successful logging in, you will get the message screen with the “PRESS ENTER TO CONTINUE” message at the bottom. A small ‘loading’ message will flash on the screen before you get the ‘Datatel – Colleague’ screen.

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Options on the very top row:



To start a new session, click on **File**, then **New Session**, then **Current Account** to stay in the same account (Live or Test) or **New Account** to open a session in the opposite account.

To change the application, click on **Apps**, check the application wanted: ST is the student application and most users will not need to use another application.

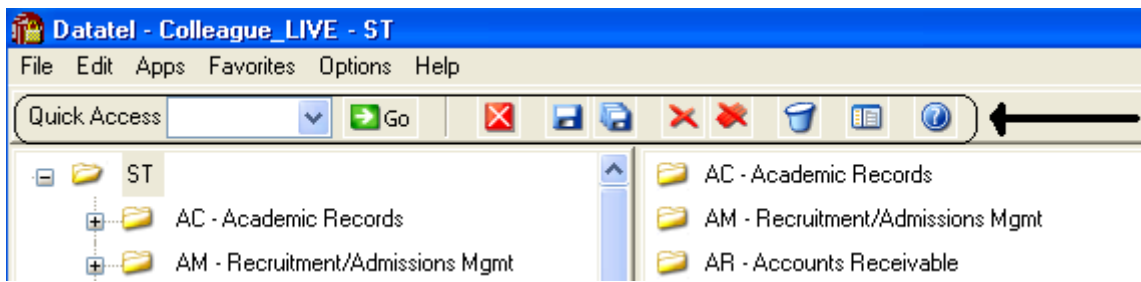
If you use a few screens often and want them on a separate list, click on **Favorites**, then **Add to Favorites**, then type in the mnemonic of the screen and click OK.

To change the font or colors on your screens/reports, click on **Options**, then **Font** or **Change Colors**.

To be able to scroll back to see output on the screen from paragraphs run from a user menu (to see list of menus, click on NCCR, then XNSU), click on **Options**, then **Show UI Console**. A Datatel UI Console window will appear on the screen. Enter the menu name on the Datatel-Colleague main screen. Answers to the prompts can be entered on Datatel – Colleague main screen or in the Send to Host box at the bottom of the Show UI Console window. To view output on the screen, use the scroll up or down buttons at the right on the Show UI Console window.

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Options on the Second Row:



If you know the name of the screen you want to access, type in the mnemonic in the **Quick Access** box and click **Go**. The drop down box in the Quick Access box will contain the mnemonics you have used previously.

If you are updating records and have not detailed to another screen, click on the **Single Disk** (or pressing F10) to update the current screen and retain the same screen to select a new record. If you have detailed to another screen, click on the **Single Disk** (press F10) to update the current screen and return to the screen from which you detailed. If you have detailed down to additional screens and wish to update all the fields that you have changed on all the screens and return to the menu, click on the **Multiple Disks**.

If you have looked at a screen without detailing down and do not want to make any updates but want to look at other records on the same screen, click on the **Red Diagonal with a Single Cross Diagonal** (or pressing F8). If you have detailed down and you do not wish to update the fields on the current screen (and any screens you detailed from to get to the current screen) and return to the menu, click on the **Red Diagonal with a Multiple Cross Diagonals**. **Warning**. If you click the Red multiple Cross Diagonals, none of the changes you made on any screen you detailed from will be saved.

Wastebasket (Shift-F10) is for deleting entire records. Clicking on the **Menu** when on a screen turns on (off) the menu display on left side of screen. To see the Field Help for the field where the cursor is, click the **Blue Circle with a ? (F1)** inside.

Menu



To expand the menu on the left side of the screen to see submenu(s), click on the Plus sign (+). To remove submenus, click the Minus sign (-).

To access a screen without typing the mnemonic, click on a screen name that does not have a plus (+) or a minus (-) in front.

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To see a list of screens that you have added to **Favorites** (see above), expand the Favorites Menu by clicking on the Plus sign in front of Favorites. This will enable you to display a customized menu of screen names.

Detail Screens

Screen mnemonics display at the top of left hand corner. To move to a new field, use the mouse to point and click on the new field.

Multiple value fields will have a box with a number at the left of the data.

A box with bright colors to the right of the data indicate that you can drill down to a detail screen by clicking on the box or by pressing F2. Do not drill down from a Comment screen. If, however, you drill down from a Comment screen, you will be taken to an editor. To return to the Comment screen, enter 'fi' at the bottom.

The names of the screens that you have drilled through will display at the top. You can look at one of those screens by clicking on it; however, you will not be able to update it unless you cancel (clicking on the single red X box in the 2nd top row or pressing F2) or finish out (clicking on single black X box in the 2nd top row or pressing F9) of the screens that you detailed to.

Fields with a box at the right with a 'V' have Validation Codes associated with the field. To see a list of valid codes, click on the box. To select a value, click on the item in the list.

If you enter 3 dots (...) in a field that has table values associated, the table will be displayed. To select a value, type in the number associated with the list and press enter OR check the box (or boxes to populate multiple values in a multiple valued field) to the left of the number and click on the disk at the bottom of the screen.

Fields with 2 small rectangles with an up arrow in the top rectangle and a down arrow in the bottom rectangle allow you to scroll through the fields by clicking on the up or down arrow. Right click on the up or down arrow for a drop down box allowing you to select from a list of options.

Fields with a box with a calendar are date fields. You can select a date from a calendar by clicking of the box and clicking on a day on the calendar. When the calendar is displayed, you can change the month by clicking the single 'less than (<)' or 'greater than (>)' symbol; to change the year, click the double less than (<<) or greater than (>>) symbols.

To copy the value in a field highlight the field, press Ctrl C; to paste that value in another field, highlight the new field and press Ctrl V. Alternatively, highlight value to copy, click Edit, click Copy, highlight the new field, click Edit, click Paste.

Date and Time Stamp

Put the cursor is in the Comment field, click on Edit, then click on Date/Time/Login Stamp

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To view a report

Output from processes (ie EVAL) or reports on UTFB will be displayed in a report browser. To scroll through the current page, use the scroll bar at the right side. To go to a new page, press the Left or Right Arrow (Page Down, Page UP). The rightmost Printer is used to print to a printer that has been defined to Colleague.

Function keys

F1 → Field Help provides on-line short help specific to the field in which the cursor is positioned.

F1 Enter → Field Help provides a longer on-line, detailed help messages specific to the field in which the cursor is positioned

Shift F1 → Process HELP gives an overview of a process, explaining its basic function and its relation to other processes

F2 → DETAIL moves to different screens and is used when there is box to the right of the screen indicating that drill down screen(s) are available.

Shift F2 → Funct HELP (Fkey HELP) displays the layout of function key assignments for keyboard.

Shift F8 → Direct Acc cancels the updates made on the screen and returns to the previous screen

F9 → FINISH saves new data entered and takes you back to the previous screen or menu

Shift F9 →FINISH same as F9

QUICK TIPS

- ✧ To display the last person, term, section, etc.. displayed use @ on the command line.
- ✧ To display a list of table values when the cursor is on the command line type "...".
- ✧ Always Cancel from a screen you are not updating. Caution: Changes made on a drill down screen will not be saved when you cancel from the current screen.

Search Procedures

Student searches may be completed in several ways:

- Student Social Security Number
- Student Colleague ID
- Exact Student Name
- Student Name by Sound

Student Social Security Number Search

- ◆ To begin a record search, first use the social security number if available. Check the name and birth date to confirm a match of the record for which you are searching.

Student Colleague ID Search

- ◆ Colleague ID, a 7 digit unique ID assigned by Colleague, can also be used for a person search. Again, check the name and birth date to confirm a match of the record for which you are searching

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Name Search

Name searches will display a resolution screen listing all people meeting the name search criteria. Select the desired record by using the sequence number.

Exact Name Search

A name search can be done in three ways: “First Name” (space) “Last Name”; “Last Name”, “First Name”; or “Last Name” only. It is also permissible to use only part of the first or last name for a broader name search. ** You must use a minimum of three characters when doing a partial name search.

When searching for a name with spaces, use the underscore key “_” to identify the position(s) in the name where the spaces are located. Example: Terrance Van Den Hemmel would be searched for by entering “Terrence Van_Den_Hemmel” or “Van_Den_Hemmel, Terrance”.

When searching for a name with an apostrophe or a hyphen, leave the apostrophe or the hyphen in the name search. Example: Bruce O’Neil would be searched for by entering “Bruce O’Neil” or “O’Neil, Bruce”, Marge Wilson-Hart would be searched for by entering “Marge Wilson-Hart” or “Wilson-Hart, Marge”. The name search will also find Marge by using either part of her hyphenated last name. Example: “Wilson, Marge” or “Hart, Marge”.

Phonetic Name Search

If social security number search and name search (full and partial) fail to yield a result, use the soundex option. This option will search for a last name by “the way it sounds”. At the lookup prompt, type in “/” before typing in the phonetic spelling of the last name. This does a broad search by the sound of the last name, but it is not as reliable as the other search options.

The name search will search records based on the “Name LFM” and “Other LFM” fields. The name search will not search records based on the “Pref Name” or “Mail Name” fields. All possible record matches are displayed on the “person resolution” screen by preferred name.

When a list of possible records is found on the “person resolution” screen, check the social security number, birth date, entry date, and address to confirm a match of the record for which you are searching.

Other Searches

Course or Section Search

Enter XXXX-000-00

Where: XXXX is the prefix for the course (i.e.: BIOL)

000 is the course number (i.e: 101)

00 is the section number with the university identifier(i.e.:x 01)

Example: BIOL-101-D01

If the section number is not provided, a resolution screen will be displayed for the selection of the correct section.

Term Search

Enter YYYYTT (i.e.: 1998FA)

Where: YYYY is the year in which the term actually occurs (i.e.: 1998)

TT is the term

(i.e. FA = Fall , SP = Spring, SU = Summer)

Restricted lookup by Topic Code

- At the resolution screen, enter S to select sections by Topic Code (or another value on the section)
- At the SSELECT COURSE.SECTIONS BY @ID: prompt, enter the selection criteria

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- For example, WITH SEC.TOPIC.CODE EQ 'USDSU' will bring back the sections only offered at SDPURC

Restricted lookup for open sections

Search for open sections by entering S at the section resolution screen from RGN, then type WITH SEC.AVAIL.STATUS EQ 'Open' and return.

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Record Search Overview

Responsibility: University

LookUp Selection Options

The LookUp Processor gives you full query-language selection capabilities along with full data field and record security. Many of the selection options available with LookUp are similar to using database management query language and retrieval. See your system administrator if you need assistance using any of these options.

You may enter one of the following at the LookUp prompt:

- * the actual ID
- * [**@**] to display the last record filed
- * [...] to view all IDs you may access
- * [**ABC...**] to select all IDs that begin with ABC
- * [**...ABC**] to select all IDs that end with ABC
- * [**...ABC...**] to select all IDs that contain the characters ABC
- * [**ABC...XYZ**] to select all IDs that begin with ABC and end with XYZ
- * [**;**] to display all available dictionary elements for this file
- * [**;**]dictname to 1) Select all IDs with a value for this dictionary element or 2) If dictname is an indexed field, to display a resolution screen showing all the values indexed for this dictname. For example, you might enter ";SCHOOLS.DEPTS" at the Schools LookUp prompt to find all the schools in your institution associated with one or more departments.
- * [**;**]dictname datavalue to select all IDs with a value like the datavalue for this dictionary element. For example, you might enter ";SCHOOLS.DEPTS MATH" at the Schools LookUp prompt to find all the schools in your institution associated with the math department.
- * [**;**]dictname operand datavalue to select all IDs whose value of dictname matches the operand and datavalue(s). A datavalue may be any string containing alphanumeric characters or ellipsis (...). For example, you might enter ";SCHOOLS.DEPTS NE MATH" at the Schools LookUp prompt to find all the schools in your institution not associated with the math department.

Valid operands are:

- * [**=**] or [**EQ**] (Equal)
- * [**<>**] or [**NE**] (NOT Equal)
- * [**>**] or [**GT**] (Greater Than)
- * [**>=**] or [**GE**] (Greater or Equal)
- * [**<**] or [**LT**] (Less Than)
- * [**<=**] or [**LE**] (Less or Equal)
- * [**MATCHES**]
- * [**LIKE**]
- * [**UNLIKE**]

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Record Lookup

There are various types of records created in Colleague. Person or Organization records, records for courses and course sections, academic credentials, positions, benefits, general ledger accounts, and purchase orders are just a few of the types of records created throughout Colleague. Generally speaking, once these records are created, information pertaining to them can be changed or deleted but the actual person or organization record will always remain. For example if you create a course record for ENGL-1234, once saved, you can change the credits, academic level, title, CIP codes, etc., but you can't change the name to ENGL-2345. Similarly, if you create a person record for Bob Smith and save the record you can later change his address, phone number, birth date or even his social security number but you can't delete Bob Smith's record. The following are steps, or procedures, for searching records:

Person/Organization Lookup

The person/organization record is the more difficult record to find since you are relying on two variables. First is that the person providing the information was honest in presenting the demographic facts and secondly that the data entry person was accurate in entering in data. On occasion, you will find that people provide incorrect information or even falsify data. This is commonly seen when people can't quite remember their social security number so they provide one that is close. Secondly, data entry staff are only human so honest mistakes do occur when they try to read scribbled handwriting on a form. Regardless of how inaccurate data got into the system, front-end staff must carefully check for those eventualities before adding new records.

The following step-by-step process is for looking up records as well as an explanation of the reason for the process:

1. **Enter first two letters of first name and first three letters of the last name** - (You can also enter Smi, J and Colleague uses the comma to designate last, first). Although this option will bring more records than spelling the entire name out, it helps locate records with incorrect or slightly different spellings. If you chose to enter the entire name you would certainly get a smaller group of records to look through but you also have a greater chance of missing duplicates.

IF YOU HAVE NO MATCH:

2. **Enter the Social Security Number** - Although you may not see the need to use this option after a name lookup does not pull a match, some students may have been using the wrong number or you may find a conflict with the number. Since the social security number is a unique identifier, we want to ensure that we have the correct number associated with that person.

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IF YOU HAVE A NAME WITH UNUSUAL SPELLINGS:

3. **Try a Soundex lookup-** in some situations you may encounter names that have several common spellings or that you have difficulty in determining proper spelling. By using a Soundex lookup you will find occurrences that don't match the spelling but sound like the name you are searching for. To look a name up using Soundex, at the Person Look Up type: /erdlika, ray (actual name searching for is: Hrdlicka, Raymond).

Use the data elements on the resolution screen to verify that the right person is selected. Also check to see if two records look similar. Remember that the system will allow entry of the same person twice (except for the social security number). If the birth date and the address are the same, it may indicate that there is a duplicate. If the record is truly a duplicate, follow the procedure in the final section of this document to consolidate the record into one.

**** POINTS TO REMEMBER ****

- 1) If the person whose name is being entered goes by another name or a nickname, that person's name may not be found unless the other name has been entered on NAE as an "Other Name" or a nickname has been entered on the BIO (Biographic Information) screen. It is really a judgment call when entering a person's name and deciding whether or not that name is the person's legal or other name. However, the Human Resources/Payroll office will have the legal names of employees.

EXAMPLE: The end-user has an application to enter and they are using the APPN screen. The name on the application is Jimmy Stern. James Stern was entered previously as a prospect on the XPRS screen. The end-user enters Jimmy Stern at the Person Lookup and the record is not found. They also do a partial name lookup of Ji St and the record is not found. Using the first initial of "J" would have found the name James Stern.

EXAMPLE: Buck Stern was entered on the XPRS screen as that is the name he had put on a Prospect card from a High School Fair. His application is now in the Admissions office with James R. Stern entered on the application. James R. Stern would not be found in a Person Lookup as Buck Stern had been entered as a prospect. An alternate lookup would be to type the last name "Stern" only.

- 2) The "Preferred Name" field is a default from the entry in the "Last", "First", "Middle" field at the top of the NAE screen. If one name only is entered in the "Preferred Name" field then LookUp for that person would be the first name only. For example: Rachel Briggs goes by "Sammy" Briggs. Sammy only is entered in the "Preferred Name" field. A data entry person goes to look up Sammy Briggs and that name is not found.

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RECOMMENDATION: Leave the “Preferred Name” as it appears after entry in the Last, First, Middle fields and enter the other name in the “Nickname” field on the Biographic Information (BIO) screen. *This screen can be accessed by detailing on the Last, First, Middle name field on NAE.*

Other Records Lookup

Since there are fewer opportunities for spelling errors and the format for naming is usually very structured, other record lookups tend to be more straightforward. However just as with person records, it is important to follow consistent steps when searching before adding records. Following is a step-by-step process for looking up records:

1. **Enter a partial lookup** - Once again this option will bring back additional records that will require you to look through more resolution items but it helps ensure that the record you wish to enter doesn't exist in a similar form. On some lookup screens you may be required to enter complete pieces such as with courses (on CRSE you need to enter the full subject name ie., ENGL).
2. **Use (...) as a wild card lookup** – Looking for a group of records that fit a specific criteria can be done by using ... For example, looking up a GL number with the numbers “1150” in the middle you can type ...1150... at the lookup prompt. Only those numbers with 1150 will appear on the resolution screen. This applies as well by typing ... at the beginning or at the end of the lookup. For example, in searching for positions that end in ADJ you would type ...ADJ or searching for all departments that begin like EN you would type EN...

Individual and Corporation Record Relationship

****CAUTION****

In Colleague, the system maintains a **unique distinction for individuals and corporations**. When you enter a person on NAE, APPN, FCTY or FACL, the system creates a record in the PERSON file. Likewise, when an organization is created on ORGP, a record is created in the CORP.FOUNDS file. The concern arises when lookups are done on a screen earmarked for the other (calling up University of Sioux Falls on NAE or Mary Smith on ORGP). Colleague gives you a message similar to the one below. If you save out the screen, the record will be moved to the other ‘domain’. In other words, an organization record could be converted to a PERSON record or a PERSON record could be converted to a CORP.FOUNDS record.

If you have update access to the screen and receive a ‘Warning! This record will be marked as a person if updated’ message, you must:

- Click OK to release the warning message.

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- Cancel out of the screen without making any changes by clicking on the single or triple X, clicking on File and Cancel or using Shift -> F8 and hit Enter.
- If you want to access the record, go to ORGP (corporations) or NAE (individuals).

If you accidentally make the change you can return the record to the correct domain by calling up the record on the appropriate screen.

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Flagging records on a resolution screen

For ease in data entry, Colleague allows you to flag either all records on a resolution screen or certain records on a resolution screen. To flag certain records, enter F on the resolution screen, then enter the number of the item you wish to flag. To flag all records, enter F ALL on the resolution screen. Notice all records have an asterisk next to them. You can do a sort/select option before the F ALL to narrow the resolution screen down.

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Using a savedlist to process large numbers of records

- At the person lookup prompt, enter @SELECT
- The Primary Selection Criteria (PSC) screen is displayed
 - Enter the savelist list name
- Update to process the records
 - Enter @@ or \$ at the LookUp prompt to retrieve/view the first selected record, etc
- To deactivate your list, enter @SELECT at the LookUp prompt
 - Save or clear the list

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Creating a Communications Management Process

Responsibility: University

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

- Communications Management is delivered with the capability to associate communication items with a given office.
- Likewise, staff members are assigned an office(s) to identify what information they should be allowed to see or access.
- This will allow South Dakota to set up a structure where staff can/will be limited to seeing only information that pertains to their respective university, when deemed appropriate.
- Additionally, the codes used to identify information in communication management will be coded to include a university identifier.
- By smart-coding our information and utilizing the office code security features already in Communications Management, we will be able to meet the requirements for securing the correspondence information.

Each university is responsible for mapping processes, identifying communications, performing code set-up and communications management processing for their own university. Staff at the Enrollment Services Center (ESC) will be responsible for activities that run centrally.

Step 1 - Map the process.

- Use flow-charting and other techniques to “map out” the current process of communicating with individuals.
 - 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
 - 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 as well as for information gathering 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.

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- Define the codes for all of your outgoing and incoming communications.
- See “Defining Document Codes” for more information about setting up your outgoing document codes.
- See “Defining Communication Codes” for more information about setting up your incoming communication codes.
- Each university is responsible for defining codes to accommodate university processing.
- Enrollment Services Center (ESC) will have a common set of codes

Step 4 – Categorize your 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.
- **Tracks** are made up of a predefined series of documents to be sent to the individuals on your system. A tracking code consists of a list of document codes and the associated processing dates. The documents are assigned either x number of days after the track is assigned or on a certain processing day.
 - See “Defining Document Tracks” for more information about setting up your document tracks.
- Groups of communication request codes (incoming communications) let you identify what you expect from individual and associate specific actions upon the receipt of each individual item or the complete group of items.
- **Correspondence Requests Definitions** are used to identify required incoming correspondence.
 - See “Defining Correspondence Request Tracks” for more information about setting up your correspondence request tracks.
- **Custom Paragraphs** can be created and inserted into a document. These are used for email purposes or bullet points in a letter.

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.”

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Using Communications Management with Admissions

Responsibility: University

This section provides some high-level steps to help you set up both the Communications Management and the Recruitment/Admissions Management modules for automating many of your communications tasks.

- Communications Management is delivered with the capability to associate communication items with a given office.
- Likewise, staff members are assigned an office(s) to identify what information they should be allowed to see or access.
- This will allow South Dakota to set up a structure where staff can/will be limited to seeing only information that pertains to their respective university, when deemed appropriate.
- Additionally, the codes used to identify information in communication management will be coded to include a university identifier.
- By smart-coding our information and utilizing the office code security features already in Communications Management, we will be able to meet the requirements for securing the correspondence information.

Each university is responsible for mapping processes, identifying communications, performing code set-up and communications management processing for their own university. Staff at the Enrollment Services Center (ESC) will be responsible these activities for processes run centrally.

Step 1 - Map the process.

- Use flowcharting and other techniques to “map out” your current process of communicating with prospects and applicants.
 - This process should not focus on any automated systems but should instead identify the general flow of information into and out of the admissions office.
- From the flow charts you should be able to identify the
 - information that is sent out of the admissions office
 - information that is received from prospects and applicants
 - 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 flowcharts, list each piece of outgoing and incoming communications.
- Be as specific as you need to accurately manage your processes as well as for information gathering that will help with analyzing your recruitment 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).

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Step 3 - Define your codes.

- Define the codes for all of your outgoing and incoming communications.
- See “Defining Document Codes” for more information about setting up your document codes.
- See “Defining Communication Codes” for more information about setting up your communication codes.
- Each university is responsible for defining codes to accommodate university processing.
- Enrollment Services Center (ESC) will have a common set of 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 codes (incoming communications) let you identify what you expect from individual and associate specific actions upon the receipt of each individual item or the complete group of items.
- **Tracks** are made up of a predefined series of documents to be sent to the individuals on your system. A tracking code consists of a list of document codes and the associated processing dates. The documents are assigned either x number of days after the track is assigned or on a certain processing day.
 - See “Defining Document Tracks” for more information about setting up your document tracks.
- **Correspondence Requests Definitions** are used to identify required incoming correspondence.
 - See “Defining Correspondence Request Tracks” for more information about setting up your correspondence request tracks.
- **Custom Paragraphs** can be created and inserted into a document.

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

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

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Defining a Document Code

Responsibility: University

- Communications Management is delivered with the capability to associate communication items with a given office.
- Likewise, staff members are assigned an office(s) to identify what information they should be allowed to see or access.
- This will allow South Dakota to set up a structure where staff can/will be limited to seeing only information that pertains to their respective university, when deemed appropriate.
- Additionally, the codes used to identify information in communication management will be coded to include a university identifier.
- By smart-coding our information and utilizing the office code security features already in Communications Management, we will be able to meet the requirements for securing the correspondence information.

Use the Document Codes (DOC) screen to create a profile of your outgoing document. You must enter values in the Document Type, Office Code, and History Type fields.

Step 1 – Access the Document Codes (DOC) screen

Step 2 – Enter the document code at the document lookup prompt.

- Use the established naming convention for the code or search for an existing code by using the university identifier and ...
- Naming convention is university identifier or 'C' for common -> module -> type of code (D for document) -> name of doc
- If the code does not exist, you are prompted with Enter (A) to add
- Enter A

Step 3 – Enter a description for this document

- Displays on communications management screens such as IHS and IPC when this code is used.

Step 4 – Enter a Document Type

- Enter COQT for Comma-Quote Output File
- Enter LIST to create a saved list

Step 5 – Enter an Office Code

- Smart coded field
 - F1 twice to view list or enter code directly
- Restricts access to those staff members that have this office code

Step 6 – Enter an author if appropriate

- If you enter an author, Colleague uses this information to determine the salutation to use from the Communication Information (COM) screen.

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- You must enter the Salutation code on Document File Set-up (DFS)
- This is the person who may sign the correspondence or who the email status notice will be sent to
- This person must have a staff record.

Step 7 – Enter Receipt Numbers if appropriate

Step 8 – Enter a History Type

- The history type indicates whether a historical record will be kept when the document is processed. You can enter one of the following codes which are defined in the DOCUMENT.HISTORY.TYPES validation code table:
 - [C] Code. The document code is retained as history for the individual when processed.
 - [F] Full. A full history is kept on the document.
 - [N] None. No history is kept on the document.

Step 9 – Enter if this document can be sent multiple times to the same person

- Enter ‘Y’ if you want to send this document multiple times (more than once) to the same person if the document code is assigned more than once. This document could be sent more than once if its associated code is assigned to more than one track. For example, you may want to send a missing items letter to applicants several times.
- Enter ‘N’ if you do not want this document sent to the same person more than once. Colleague will review the history record before generating a letter request. If the document has already been sent to the individual, it will not be sent again. You can still manually assign the document to an individual through IPC. You will just get a warning message that can be bypassed.

Step 10 – Enter a Print Day if appropriate

- You can enter the day of the week or [D] for daily depending on when you want this document to be printed or processed. Daily is recommended as you choose when you want to process your batches.
- When a letter request is assigned to an individual, the Communications Management module calculates the date when each document should be processed from the print day.

Step 11 – Enter a Printer Number here

- If you leave it blank, you can assign a printer during the batch process. This is for informational purposes only.

Step 12 – Enter a Paper Name if appropriate

- For documents requiring special forms

Step 13 – Determine if you wish to Recalc Paragraphs

- If you enter Y in this field then when you run the PCB process (Process Corres. Batch) and elect to Recalculate Letter Data then all custom paragraphs identified

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within the document will also be recalculated. This means that any customization to the text built by the paragraph made through IPC (Individual Pending Corres.) will be lost when the paragraphs are recalculated.

Step 14 – Detail to the Define Custom Paragraphs (DPAR) screen or enter the university identifier and “...” to locate an existing paragraph. It is recommended that paragraphs are kept to one or two lines for formatting purposes in Microsoft. If more lines are needed you should export a code and use the bookmark functionality in Microsoft Word.

- If you are creating a new paragraph, enter the name at the lookup
 - Naming convention is university -> module -> type (P) -> name of paragraph
 - Enter (A) to add
 - Enter a description for the paragraph
 - Enter the smart coded office code to restrict access to this paragraph
 - Enter a merge file to use when variables are identified in the text
 - For example, you enter [PERSON] in this field. If you enter @FIRST.NAME in the Paragraph Text field, an individual's first name will be substituted in place of the @FIRST.NAME dictionary item when this paragraph is used with a document associated with that individual.
 - Enter the paragraph
 - Update the DPAR screen

Step 15 – Enter the Insertion point for this paragraph

- If you are including more than one paragraph, enter 1 to 5 for the order you want them inserted to appear in your letter.

Step 16 – Enter the rule that applies to this paragraph for assignment of this paragraph to an individual, if appropriate. For example, if only a transfer student needs college transcripts, you might write a rule to read Admit.Status = Transfer.

Step 17 – Detail on Doc File Setup to the Document File Setup (DFS) screen

- Define the Dictionary Fields from the LTREQ file for this document
- Update the DFS

Step 18 – Update the DOC screen

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Assigning a Document to an Individual

Responsibility: University

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) screen.

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

Anyone added to a track after the “By Date” will not have the document on their IPC screen

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 by clicking on the number associated with the document and deleting the ‘whole group’.

Step 3 - Detail to the Individual Pending Corres Det (IPCD) screen.

- The IPCD screen displays.

Step 4 - Go to the Document Name field.

- Enter a document code to assign that document to the individual.
- Specify a print date for the document.
- From the IPCD screen, you can also
 - Add custom text by detailing on the Custom Text field
 - Add a custom salutation in the Salutation field
 - Change the correspondence type for new or existing correspondence.

Step 5 - Save the record.

- This piece of correspondence remains pending until it is processed.
- See “Processing Correspondence” for more information about processing your pending correspondence.

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Customizing an Individual Document

Responsibility: University

Complete the following steps to customize an individual document:

Note: You can only customize a document if you entered NO in the Recalc Paragraphs field when you created the document on DOC.

Step 1 - Familiarize yourself with the customization process.

- See “Understanding Document Customization”

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

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

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

Step 4 - Detail to the Individual Pending Corres Det (IPCD) screen.

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

Step 5 - Detail to the Pending Corres Custom Text (IPCT) screen.

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

Step 6 - Detail on the appropriate Custom Text field.

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 screens.

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Setting Up and Using Word Processors

Responsibility: University

You can choose to have your letters stored on the Colleague host (using Winteg.Word Document type) stored the letters on your hard or network drive (using COQT Document type). If you choose to store your letter(s) on the hard drive you must create a header record as well at FTP your data to the appropriate drive. Storing your letter(s) and headers of Colleague (Winteg.Word) allows you to skip creating the header record as well as the FTP process as that process is delivered with Winteg.Word.

A few Notes on using Winteg.Word:

- Macro Level Security: you must set macro security to medium or low. To do this, go to the Tools menu and select Macro, then 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.
- For Release 17 UI, the Microsoft Word version must be 8 or higher. This version must be set up on the Communication Management (PID7) screen in the field Word Processor Version Number.

The following steps explain set-up of both Winteg.Word and Comma Quote (COQT) Document Types:

Step 1 - To use word processors with your document, access the Document Codes (DOC) screen.

- At the document lookup prompt, enter an existing document name, university identifier and ... to search by university or add a new document using the naming convention of university ID or (C)ommon -> module -> type (D) -> name
- Define COQT or Winteg.Word as your document Type
- On this screen you can detail to the Define Custom Paragraphs (DPAR) screen to enter custom paragraphs or to the Document File Setup (DFS) screen to enter merge fields for your document.

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 cofile of PERSON (such as FACULTY or STUDENTS or APPLICANTS).
- The merge file must give you access either directly or indirectly (via pointers) to the data you wish to incorporate into the document.

Step 3 - In the Document File field, Colleague automatically populates PC.LTRS if you are using Winteg.Word as your document type. If you are using COQT, you do not need to populate this field.TMP.LTRS is only used if you are using WordPerfect.

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Step 4 – You must setup merge fields, detail to the Document File Setup (DFS) screen from the Doc File Setup field. This screen is where your merge variables are read (i.e., first.name, last.name, lr.addresses)

Step 5 - 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.

Step 6 - 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.

Step 7 - 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.
- **WINTEG.WORD.** Leave the Output File field blank.

Step 8 - Doc File Set-Up (DFS): In the Dictionary 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 9 - In the Max Values field, enter the maximum number of values to be transferred for a multi-valued field.

Note: If you create text paragraphs on DPAR that consist of more than one line of text, you will need to account for each line when calculating Max Values. Max Values is used to indicate how many values (that is, how many custom paragraphs and/or text paragraph lines or codes) could be contained in the associated multivalued field.

- When processing the LTREQ.CUSTOM# multi-valued fields, Colleague inserts a blank field after each valid field.
 - This means that when defining Max Values for Custom Paragraphs, you need to include twice the number of possible values.

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- Failure to make Max Values high enough will cause you to lose data when the COQT file is created. Using WINTEG.WORD, Max Values can go up to 999 per field.
- For example: You create 10 custom paragraphs using text and associate them with Position 1. You determine that one individual could have up to 7 custom paragraphs. On Document File Setup (DFS), you enter the Field Name LTREQ.CUSTOM1. For the associated Max Values, you enter 14.
- Another example would be that you have defined 40 codes that the student could receive. These codes relate to a bookmark file in Word. You would need to have a max value of 40.

Step 10 - Save at the DFS screen to return to the DOC screen.

Step 11 - Are you using a COQT or a WINTEG.WORD document?

- **COQT.**
 - Update the DOC screen and continue in Microsoft Word.
 - You must create a header record in Word.
 - To do this:
 - Open your form letter.
 - Access the Create Header Source window from the Tools menu by selecting Mail Merge, Get Data, Header Options, then Create.
 - Remove Word-delivered field names.
 - Enter field names in the order listed on the DFS screen.
 - For each field on DFS that has a Max Value, create a field name for each number in Max Values.
 - Name and save the Header record.
 - Use Mail Merge to create a merge document from your form letter.
- **WINTEG.WORD.**
 - Detail on the Create/Edit Doc field to access Microsoft Word.
 - Header records will automatically be created from the data entered on DFS for WINTEG.WORD document types.
 - Write your letter once Microsoft Word opens including placing your header records in the letter.

Technical Tips:

1. 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.
2. The first time you detail on the Create/Edit field, a dialog box displays, you must define the path where your word processor's software is stored. Depending on your Windows environment (i.e., Windows 2000 or Windows XP) Microsoft Word is stored in various places. The file you want to open is defined as WINWORD.EXE. See your system administrator if you are having difficulties finding where Microsoft Word is stored.

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3. For a WINTEG.WORD document type, the fields defined on DFS are used to build the data source for the merge (header.doc in the c:\Datatel directory). 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).

Step 12 - Locate your word processor's executable file on your PC and click Open to launch your word processor.

- Microsoft Word will open with a document (c:\datatel\datatel.doc).
- Note: Leave this file name as Datatel.Doc as this is how it should be stored on Colleague. (i.e., do NOT SAVE AS acceptedltr.doc)
- The relationship between the DFS screen and the WINTEG.WORD document type's header is shown below:

Step 13 - When you click on the Insert Merge Fields button, you will see the header fields created from the fields you entered on the DFS screen.

- Create your letter and add merge fields as desired.
- If you are working with existing documents, then the document and header/data source definitions will be copied from the host system onto your PC. Some of the old formatted documents may not have the data source properly set up. Follow these steps to correct these documents:
 - Cut and paste the old document into a new document.
 - Close the original document (c:\datatel\datatel.doc) and save the new document as Datatel.doc.
 - Use the Mail Merge Helper to define your data source and save it as c:\datatel\header.doc. Remember, the data fields must be the same data fields you specified on the DFS screen, only without periods.

Step 14 - When you are finished, save the document.

- You are returned to Colleague.

Step 15 - Click S to save the document on the host.

- Update the Colleague DOC screen.

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Defining a Document Track

Responsibility: University

- Communications Management is delivered with the capability to associate communication items with a given office.
- Likewise, staff members are assigned an office(s) to identify what information they should be allowed to see or access.
- This will allow South Dakota to set up a structure where staff can/will be limited to seeing only information that pertains to their respective university, when deemed appropriate.
- Additionally, the codes used to identify information in communication management will be coded to include a university identifier.
- By smart-coding our information and utilizing the office code security features already in Communications Management, we will be able to meet the requirements for securing the correspondence information.

Complete the following steps to define your document tracks:

Step 1 - Access the Tracking Codes (TRC) screen.

Step 2 - Define the tracking code.

- At the LookUp prompt, enter the new code name and choose (A) to add.
 - Naming convention is university ID -> module -> type (T) -> name
- Enter the description of the track
- Enter the office code to restrict access for this track.
 - The office codes will be smart-coded for each university and common for ESC.

Step 3 - Add documents to the track.

- You can choose existing documents or create documents by detailing on the document field
 - See Defining a Document Code for procedures
- Enter the number of days to elapse before sending the document
 - Use for material that is not date sensitive
- If you do not enter Days, you must enter a By Date
 - If you enter the By Date and the Days, the By Date is a cut-off date. The document will be processed the number of Days following track activation but will not be processed after the By Date.
 - If you enter the By Date and leave the Days field blank, the document is processed on the By Date.
 - You can use both By Date and Days to have the document triggered on days as well as a cut off date.

Step 4 – Update the TRC screen.

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Assigning a Document Track: Individual Mode

Responsibility: University

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

Step 1 – Access the Individual Tracking (ITR) screen

Step 2 - Access the record for the individual to whom you want to assign the track.

Step 3 - 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 screen.
- The active date defaults to today's date but can be changed if needed.
 - The active date is the date to start this track.

Note: Anyone added to a track after the “By Date” on the Track will not have the document on their IPC screen

If a document is not going to be sent and it has already been assigned to prospects/applicants, the document should be processed and deleted on the Process Correspondence Batch (PCB) screen. If the “By Date” for the document has not yet been reached, change the date to the current date on the track record on TRC. This will stop the document from being added to more prospect records.

Step 3 – Update the ITR screen.

- When you save the record, the system assigns the track to the individual.

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Assigning a Document Track: Group Mode

Responsibility: University

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

Step 1 - Access the Group Track Assignment (GTA) screen.

Step 2 - 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).
- The date defaults into today's date but can be changed if needed.

Step 3 - 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.
 - The file name defaults in as MAILING but can be changed to PERSON for example..

Note: Anyone added to a track after the "By Date" will not have the document on their IPC screen

If a document is not going to be sent and it has already been assigned to prospects/applicants, the document should be processed and deleted on the Process Correspondence Batch (PCB) screen. If the "By Date" for the document has not yet been reached, change the date to the current date on the track record on TRC. This will stop the document from being added to more prospect records.

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.

Note: The documents can be viewed on the Individual Pending Corres (IPC) screen.

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Defining Communication Codes

Responsibility: University

- Communications Management is delivered with the capability to associate communication items with a given office.
- Likewise, staff members are assigned an office(s) to identify what information they should be allowed to see or access.
- This will allow South Dakota to set up a structure where staff can/will be limited to seeing only information that pertains to their respective university, when deemed appropriate.
- Additionally, the codes used to identify information in communication management will be coded to include a university identifier.
- By smart-coding our information and utilizing the office code security features already in Communications Management, we will be able to meet the requirements for securing the correspondence information.

Plan/document the communication codes you want to create.

Use the Communication Codes (CMC) screen to create a profile of all expected incoming documents or to set-up trigger codes to activate several actions..

Step 1 – Access the Communication Codes (CMC) screen

Step 2 – Enter the communication code at the comm code lookup prompt.

- Use the established naming convention for the code or search for an existing code by using the university identifier and ...
- Naming convention is:
 - for Special Interest recruiting: xACSRzzz where x is the university, A is Admissions, C is CMC, SR is special recruiting and zzz is free form.
 - For person origin: xACORzzz where x is the university, A is Admissions, C is CMC, OR is Origin and zzz is free form.
- If the code does not exist, you are prompted with Enter (A) to add
- Enter A

Step 3 – Enter a description for this code

Step 4 – Enter the office code associated with this communication code

- Enter the specific smart coded office or F1 twice for the table
- This restricts this communication code to only those users with privileges to this office.

The following fields only need to be populated if this CMC code is used as a Trigger Code:

Step 5 – Enter the Immediate Print Document (If appropriate)

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- Enter the document code you want to send to the queue for printing

Step 6 – Enter Special Actions if appropriate

- The subroutines defined in these special action codes can perform various functions, such as updating data in other modules.

Step 7 – Enter Correspondence Requests if appropriate

- When you receive correspondence from an individual and record its associated communication code, any correspondence request you enter in this field will either be added to or deleted from the list of requested correspondence associated with this code. (See defining Correspondence Actions {7.2} for more detail).
- Enter an Action Code
 - [A] Adds the track to the individual's record when the correspondence is received.
 - [D] Deletes the track from the individual's record when the correspondence is received.
 - [R] Resets or restarts the track when the correspondence is received. The active date for the track is changed to the date the correspondence is received.

Step 8 - Enter valid tracking codes in the Follow up on the following tracks field

- Enter the name of a track to be updated (added, deleted, or reset) when this correspondence is received. (See defining a Document Track {4.2} for more Detail)
- Enter an Action Code
 - [A] Adds the track to the individual's record when the correspondence is received.
 - [D] Deletes the track from the individual's record when the correspondence is received.
 - [R] Resets or restarts the track when the correspondence is received. The active date for the track is changed to the date the correspondence is received.

Step 9 – Update the CMC screen

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Defining Correspondence Requests Tracks

Responsibility: University

- Communications Management is delivered with the capability to associate communication items with a given office.
- Likewise, staff members are assigned an office(s) to identify what information they should be allowed to see or access.
- This will allow South Dakota to set up a structure where staff can/will be limited to seeing only information that pertains to their respective university, when deemed appropriate.
- Additionally, the codes used to identify information in communication management will be coded to include a university identifier.
- By smart-coding our information and utilizing the office code security features already in Communications Management, we will be able to meet the requirements for securing the correspondence information.

Use the Correspondence Requests Definition (CRRD) screen to create and maintain correspondence request codes. A correspondence request is a list of communication codes that are associated with each other as a single unit.

Step 1 – Access the Corres Requests Definition (CRRD)

Step 2 – Enter the correspondence request code at the corres requests lookup prompt.

- Use the established naming convention for the code or search for an existing code by using the university identifier and ...
- Naming convention is university ID or (C)ommon -> module -> type (R) -> name
- If the code does not exist, you are prompted with Enter (A) to add
- Enter A

Step 3 - Enter the description of the correspondence request track

Step 4 - Enter the office code associated with this track

- The office code is used to restrict this code to only those users with privileges for this office.

Step 5 - Enter the communication code

Step 6 - Required, Yes or No

- If this communication code is required to activate follow-up action, enter [Y] in this field.
- If this communication code is not required to activate a follow-up action, enter [N] in this field.

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- An example of how this field might be used is if ACT Test scores would be nice to receive from the applicant, but not required to complete their application, I might flag Req = No.

Step 7 - Enter the rule key which determines the assignment of this code.

- You can assign limitations or rules to each correspondence received code listed for this correspondence request. Colleague will evaluate each rule and assign the code to the individual only if the individual meets the rule criteria. An example of how this might be used; International students may need TOEFL scores, therefore a rule is written on their Immigration.status.

Step 8 - Enter the Instance Action

- Enter the action that identifies when this request is satisfied

Step 9 - Update the CRRD screen

Perform these steps if Assignment Actions or Follow up Actions are needed.

Step 10 – Access the Correspondence Requests Definition (CRRD)

Step 11 – Enter the correspondence request code at the corres requests lookup prompt.

- Access the CRRD entry used in the above steps using the established naming convention for the code or search for an existing code by using the university identifier and ...

Step 12 – Detail on Assignment Actions to the Corres Requests Assign Action (CRAA) screen. This screen defined what action should take place when the CRRD is places on the students record.

- Set up actions or events to occur when you assign this correspondence request code to individual.
- Update the CRAA screen and return to CRRD.

Step 13 – Detail on Follow up Actions to the Corres Requests Follow Up Action (CRFU) screen. This screen defines what actions(s) should take place when all CMC codes marked as required are received on CRI.

- Set up actions or events to occur when you receive all incoming correspondence associated with this correspondence request code.
- Update the CRFU screen and return to CRRD.

Step 14 - Update the CRRD screen.

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Assigning Correspondence Request Tracks: Individual Mode Responsibility: University

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) screen.

Step 2 - Select the default file suite year or enter another year if necessary.

- If you're using rules or have data fields to be evaluated that come from one of the Colleague File Suites then you can override the default File Suite processing year by entering a new year in this field.

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) screen to view the communication codes and triggers defined in a particular correspondence request track.
- The IRQ screen also displays any correspondence request tracks currently assigned to an individual.
- You can add to or modify this list as needed.

Step 4 – Update the IRQ screen.

- When you save the record, this individual is added to the listed correspondence request tracks.

South Dakota Colleague System Procedures

Assigning Correspondence Request Tracks: Group Mode

Responsibility: University

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

Step 1 - Access the Corres Request Assignment (CRA) screen.

- Select the default file suite year or enter another year if necessary.

Step 2 – Define the Rules Operator if using more than one rule

- The rules operator you enter designates how the rules are associated to one another.
- All the rules you indicate can be linked together by an AND condition or an OR condition.

Step 3 - 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) screen to create rules.
- Naming convention is university ID or (C)ommon -> module -> type (R) -> name

Step 4 - In the Correspondence Requests field, list the correspondence request tracks that you want to assign.

- You can detail to the CRRD screen to create new correspondence request tracks.
 - Enter the name of the request at the prompt, enter (A) to add
 - Naming convention is university ID or (C)ommon -> module -> type (R) -> name
 - Enter the description of the correspondence request track
 - Enter the office code associated with this track
 - The office code is used to restrict this code to only those users with privileges for this office.
 - Enter the communication code
 - Enter if Required
 - If this communication code is required to activate another action, enter [Y] in this field.
 - If this communication code is not required to activate another action, enter [N] in this field.
 - Enter the rule key which determines the assignment of this code.
 - Enter the Instance Action
 - Enter the action that identifies when this request is satisfied
 - Update the CRRD screen
- 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.

Note: You cannot reset a correspondence request track for individuals.

- The date defaults in to today's date but can be changed if needed.

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- Enter the date that actions are affected by assigning the associated code.
- Enter the Exp Act Dt
 - Corresponds to the Expected Action date field on the CRI screen.

Step 5 - 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 screen.
 - File Name defaults to MAILING

Step 6 – Update the CRA screen.

- 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) screen.

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Defining Correspondence Actions

Responsibility: University

Use the Corres Actions Definition (CRAD) screen to create correspondence actions.

Step 1 – Access the Corres Actions Definition (CRAD) screen

Step 2 – Enter the naming convention of the code at the lookup prompt or search for an existing code by using the university identifier and ...

- Naming convention is university ID or (C)ommon -> module -> type (A) -> name
- If the code does not exist, you are prompted with Enter (A) to add
- Enter A

Step 3 – Enter the description for this action

Step 4 – Enter the office code

- Enter the smart coded office code directly or F1 twice for a table
- This office restricts this code to only those users with privileges for this office.

Step 5 – Enter the Subroutine Name

Step 6 – Enter the Subroutine Type

- There are five types of subroutines predefined in the SUBROUTINE.TYPES validation code table. The SUBROUTINE.TYPES validation code table has a code number in the special processing field which is used to define the subroutine argument list.

Code 1 - Corres Received:

- * CRC.ACTIONS.ID
- * CC.CODE.ID
- * CC.DATE
- * MAT ARGUMENTS
- * ARGUMENT.COUNT

* LTREQ.ID

- * DOCUMENT.ID
- * DOCUMENT.PRINT.DATE
- * MAT ARGUMENTS
- * ARGUMENT.COUNT

Code 2 - Requests Completed:

- * CRC.ACTIONS.ID
- * MAILING.ID
- * CRC.CODE.ID
- * CRC.DATE
- * MAT ARGUMENTS
- * ARGUMENT.COUNT

Code 4 - History Action:

- * CRC.ACTIONS.ID
- * MAILING.ID
- LTREQ.ID
- * DOCUMENT.ID
- * DOCUMENT.PRINT.DATE
- * MAT ARGUMENTS
- * ARGUMENT.COUNT

Code 3 - Print Action:

- * CRC.ACTIONS.ID
- * MAILING.ID

Code 5 - Instance Action:

- * CRC.ACTIONS.ID
- * MAILING.ID

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- * CC.CODE
- * CC.DATE
- * DESCRIPTION.LIST
- * MAT ARGUMENTS
- * ARGUMENT.COUNT

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Step 7 – Enter the Subroutine Arguments

- This can only contain data elements from the MAILING or LTREQ files

Step 8 – Update the CRAD screen

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Recording Incoming Correspondence: Individual Mode

Responsibility: University

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

Step 1 - Access the Communication Code Entry (CRI) screen.

Step 2 - Access the record of the person for which you want to record incoming correspondence.

Step 3 - Select the default file suite year or enter another year, if needed.

- If you're using rules or have data fields to be evaluated that come from one of the Colleague File Suites then you can override the default File Suite processing year by entering a new year in this field.

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

- Enter the appropriate code correspondence code on a blank line.

Step 5 – Enter the correspondence status

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

Step 6 – Update the CRI screen.

- When you save the record, the system updates the individual's correspondence information and triggers any special actions.

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Recording Incoming Correspondence: Group Mode

Responsibility: University

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

Step 1 - Access the Group Communication Entry (CRG) screen.

Step 2 – Enter the Default File Suite Year, if needed

- If you're using rules or have data fields to be evaluated that come from one of the Colleague File Suites then you can override the default File Suite processing year by entering a new year in this field.

Step 3 - 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).
- The date defaults to today's date but can be changed if needed.
 - Enter the date this correspondence was received.
- Enter the Exp Act Dt
 - Enter the date you expect this action to occur for this instance.

Step 4 - 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.
 - File name defaults to MAILING

Step 4 – Update the CRG screen.

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

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Processing Correspondence

Responsibility: University

Complete the following steps to process pending correspondence:

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

- Access the VPC screen to see the list of all documents that have not yet been processed by document name and print date. Use this screen to determine which documents should be processed on a particular day. The type of document is listed between the document code and name. The document types are as follows:

Type Code	Type of Document	Steps in Processing
L	Saved List	Process, History, Delete
C	Comma Quote File	Process, History, Delete
W	Winteg.Word	Process, History, Delete
E	Email	Select, Process, History, Delete

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 by entering starting and ending dates.
- Define if you want the report in Detail or Summary

Step 3 - Correct any errors shown on the report.

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

Note: Changes to custom text will be overwritten if you said “Yes” to Recalc Paragraphs on the DOC screen.

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

- Use the Process Correspondence Batch (PCB) screen to create a new batch or edit an existing one.
 - Naming convention is university ID or (C)ommon-> module -> type (B) -> name
 - Enter (A) to add if a batch does not exist
- You can create batches based on document code, printer, paper type, or any other logical grouping.
- Use the Batch Procedure Definition (BPD) screen to create a general template to use when creating batches.

PROCESSES IN THIS DOCUMENT INCLUDE:

10/29/08 – last update

- 50 -

Revisions approved through the Module → Module Coord Committee → UDA/SDA

South Dakota Colleague System Procedures

Part I – Processing a Comma Quote File and Processing a Saved List

Part II – Printing Labels in Colleague

Part III – Processing an E-mail message

Part IV – Writing Documents to History

Part V – Deleting a Batch

Part I - Processing A Comma Quote File Or Saved List

NOTE: The first steps are the same for comma quote or saved list.

Step 1 – Access the Process Corres. Batch (PCB) screen from the main menu.

- Process only your universities' batch. Run the batch, history and delete as soon as possible to keep the PCB file clean.

Step 2 - At the Batch Process Lookup prompt, enter the name of the batch to be processed.

- Naming convention is university ID or (C)ommon -> module -> type (B) -> name
- If the batch does not already exist, the system will display the 'Record not found – Enter (A)dd or Return to Reenter' message.
- Enter **A** to add a new record.
- On the PCB screen, this name will display as the batch name.

Step 3 - Enter the following information:

- Select Start Date: Groups with a print date of today's date or later will be selected for the batch. If you do not enter a date, all document groups with a date up to the Select End Date will be selected for the batch.
- Select End Date: Groups containing today's date or earlier are selected for the batch.
- Document Groups – Enter the name of the document. All pending correspondence batches with this name will display. If necessary, these document batches may be limited in two ways:
 - Enter start/end dates to limit the selection by print date.
 - Allow all possible batches to display in the document groups field and delete (Ctrl-D twice) the batches that are not needed.
- Select - The statement entered here will further narrow the selection. The fields specified must be present in the LTREQ dictionary.
- Sort – To sort the documents by student name,
 - Enter **BY LR.LAST.NAME BY LR.FIRST.NAME**
 - To sort by zip and name,
 - Enter **BY LR.ZIP**
BY LR.LAST.NAME
BY LR.FIRST.NAME
- Action – Enter **P**.
- Update the PCB screen.

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Step 4 - The Process Corres. Print Options (PCBP) screen will display.

- Enter the following information:
 - Recalculate Letter Data – **Yes**
 - Address Hierarchy – Enter your university specific hierarchy
 - Update the PCBP screen.

Step 5 – The PCB output screen will display.

- Enter the following information:
 - Output Device: Enter **H** for hold.
- Update the PCB screen.
- The background mode screen will display.
 - No changes need to be made

The process will run. The processing screen will indicate if errors occurred during processing. When the process is complete, the message “RETURN to continue” will display. Press **ENTER**.

Step 6 - 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.
- If there are errors, corrections will need to be made before continuing this process.

Step 7 – Proceed with processing based on the type of document processed.

- If this was used to create a SAVED LIST, the process created the document’s saved list in the following format: xxxxxx_uuuuuuu where xxxxxx is the document name and uuuuuuu is your Colleague User ID. Example (AD01PRSP_DSMITHL). The saved list is ready to be used in Colleague processes such as labels. Continue with “Writing Documents to History” and “Deleting the Batch”
- If this was used to create a Comma Quote File (COQT) continue with the next steps
- If any documents in the batch were a “W” for Winteg. Word document type, those documents were queued for printing in Microsoft Word were printed during batch processing

Viewing the comma quote file.

Step 1 - Access the Sequential File Browse Shell (UTFB) screen at the main menu.

Step 2 - Enter the following information:

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- Directory File Name: Enter **_HOLD_**.
- Item Name: Enter **...xxxxxxxx...**, where “xxxxxxxx” is the name of the document, to select the batch. If more than one batch file exists at the criteria entered in the Item Name field, all files that meet that criteria will display. Use the sequence number to select the file needed.
- Browse Options: Enter **B**.
- Press **Enter**.

Step 3 - The contents of the comma-delimited file will display.

- Verify that there is information in the file and that it is correct.
- Finish out to the main menu

Transfer the file to a PC

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

Step 1 - Access the Transfer PC File (TPF) screen at the Colleague Main Menu.

Step 2 - Enter the name of the document processed in the previous PCB steps.

- This document name will display as the document name on the TPF screen.

Step 3 - Enter the following information:

- Transfer Method: Enter **W**.
- ASCII Translation: Enter **Yes**.
- PC Path Name: Enter **c:\transfer** and press **ENTER**. The document name used will complete the path name and will be the name of the file in the c:\transfer directory.
NOTE: The folder “transfer” must be created on the c drive prior to running this process.
- Update TPF to begin the transfer process.
 - A dialog box will display indicating that the transfer is taking place.
 - The TPF screen will redisplay when the transfer is complete.
 - Update TPF to return to the main menu.

Step 4 - The file can now be used in a merge at the PC level.

Step 5 - Continue processing the document by writing the document to history and deleting the document.

Part II - Printing Labels In From A Saved List Created From Pcb

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A saved list of Colleague IDs is needed to create labels in Colleague. If a saved list of Colleague IDs already exists, skip to creating and printing labels to run the labels. If a file was produced from processing the document, complete creating a saved list from a file prior to creating the labels.

Creating a Saved List from a file.

Step 1 - Access Saved List Inquiry (SVI) from the main menu prompt to create the saved list used to print labels.

Step 2 - At the Batch Process Lookup prompt, enter the batch name created in the PCB step

- Press **ENTER** until the cursor is on the appropriate line.
- Detail (**F2**).

Step 3 – The Saved List Inquiry Detail (SVID) screen will display.

- Copy from BATCHLISTS to SAVEDLISTS record field
 - Enter **Yes**.
 - Press **F9** to return to the SVI screen.
 - Press **F9** to exit from SVI.

Creating and Printing Labels.

Step 1 - Access Prospect Labels (PRLA) screen from the main menu to print the mailing labels

- **The Applicant Labels (APLA) screen could also be used**

Step 2 - At the Forms Lookup prompt, enter the appropriate form.

- Enter the following information:
 - Update Mailing History – Enter **No**.
 - Name/Address Selection – Detail (**F2**) to the NASP screen.
 - Enter your university specific hierarchy in the Name/Address Hierarchy field
 - Press **F9** to return to the PRLA screen.
 - Saved List Name – Enter the saved list name created above.
 - Press **F9** to continue.

Step 3 - The sort definition screen will display.

- To sort the labels by name, leave the screen as is.
- To sort the labels by zip, press **Shift - F3** while on the criteria field to create a blank line before field #1. Enter **APP.ZIP** in line #1.
- Press **F9** to continue.

Step 4 – The PRLA output screen will display.

- Enter the following information:
 - Output Device: Enter **H** for hold.

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- Press **F9** to continue.
- The background mode screen will display.
 - No changes need to be made to this change.
 - Press **F9** to finish creating the labels.

Step 5 - The labels will display on the screen.

- To spool the labels to the printer, enter **S** at the “Page: 1 @(0,0) ->>> Enter L,R,U,D,P,T,B,S,@(), <RETURN> or FINISH:” prompt.
- Press **ENTER**.

Step 6 - The PRLA output screen will display.

- Enter the following information:
 - Output Device – Enter **P** for Printer Spooler.
 - Printer – Enter a printer for your institution
 - Page Length: Enter **64**.
- Press **F9** to send the labels to the printer.

Part III - Processing An E-Mail Message

A Colleague login account has been setup solely for sending e-mail messages from Colleague. An e-mail delivery confirmation message that lists the status of the e-mail messages sent to each person is sent to the e-mail address listed as the primary (PRI) email address on NAE on the email login account. Therefore, in the email login account, the e-mail address listed on NAE should be the e-mail address of the person processing the e-mail. If names show up in the bad e-mail address section of the message, the e-mail address is invalid and should be removed from the NAE screen. If names show up in the blank paragraphs section, the document was not setup correctly.

Processing the e-mail document causes the e-mail messages to be sent to the person's primary (PRI) e-mail address listed on the NAE screen. A status notification email is sent to the author of the document being processed and what email is defined on NAE.

NOTE: The e-mail message to the person is sent out immediately after the document is processed on PCB. The author may receive an e-mail delivery confirmation report indicating that the e-mail was not successfully sent; however, history is updated anyway.

Creating the E-mail text.

Note: The description of the document (DOC) becomes the message subject line. The text and subject line must be created prior to sending the email address.

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Step 1 – Access the Document Codes (DOC) screen from the main menu.

Step 2 - At the Document Lookup prompt, enter the name of the document.

- Change the Description field to the subject line of the email message.
- Enter EMAIL as the document type field
- Enter a smart-coded office code
- Enter a history type of ‘C’
- Field Jump (F4) to the Custom Paragraph field.
- Detail (F2) to the Define Custom Paragraphs (DPAR) screen.

Step 3 – The Define Custom Paragraphs (DPAR) screen will display.

- In the Paragraph Text field, enter the text of the e-mail message. If text appears in that line, press Ctrl D twice to delete the existing line. Blank lines may be placed in the message by pressing Shift-F3 while on a line which contains text.
- You can insert variable information by adding a @ sign before the variable and the field enter the field in ALL CAPS (i.e., @FIRST.NAME)
- When finished, press F9 to return to the DOC screen.
- Press F9 to exit.

Selecting the Documents (This step is required to fix possible errors before the Email is sent out)

Step 1 - Log into Colleague using the special e-mail account

Step 2 – Access the Process Corres. Batch (PCB) screen from the main menu to the process the document.

Step 3 - At the Batch Process Lookup prompt, enter the name of the batch to be processed.

- Naming convention is university ID or (C)ommon -> module -> type (B) -> name
- The system will display the ‘Record not found - Enter (A)dd or Return to Reenter’ message.
- Enter **A** to add a new record and press the **ENTER** key.
- On the PCB screen, this document name will display as the batch name.

Step 4 - Enter the following information:

- Document Groups – Enter the name of the document. All pending correspondence batches with this name will display. If necessary, these document batches may be limited in two ways:
 - Enter start/end dates to limit the selection by print date.
 - Allow all possible batches to display in field #4 and delete (Ctrl-D twice) the batches that are not needed.

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- Action – Enter **S**.
- Press **F9** to continue.

Step 5 - The Process Corres. Print Options (PCBP) screen will display.

- Enter the following information:
 - Recalculate Letter Data – **Yes**
 - Address Hierarchy – Enter your university specific hierarchy
 - Merge Maximum Group Size – Change to **100**.
 - This controls the number of email status records are included in the delivery confirmation email message sent to the email login account.
 - Press **F9** and **ENTER** to continue.

Step 6 - The Process Corres. Batch (PCB) screen will display.

- Enter the following information:
 - Output Device: Enter **H** for hold.
 - Press **F9** and **ENTER** to continue.
 - The background mode screen will display.
 - No changes need to be made.
 - Press **F9** and **ENTER** to continue.

The process will run. The processing screen will indicate if errors occurred during processing. When the process is complete, the message “RETURN to continue” will display. Press **ENTER**.

If there are errors, corrections will need to be made before continuing this process.

Processing the Document

Step 1 – Access the Process Corres. Batch (PCB) from the main menu to the process the document.

Step 2 - At the Batch Process Lookup prompt, enter the name of the batch to be processed.

- On the PCB screen, this document name will display as the batch name.

Step 3 - Enter the following information:

- Action – Enter **P**.
- Press **F9** to continue.

Step 4 - The Process Corres. Print Options (PCBP) screen will display.

- No changes need to be made.
- Press **F9** and **ENTER** to continue.

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Step 5 - The PCB set printer screen will display.

- Enter the following information:
 - Output Device: Enter **H** for hold.
 - Press **F9** and **ENTER** to continue.
 - The background mode screen will display.
 - No changes need to be made.
 - Press **F9** and **ENTER** to continue.

The process will run. The processing screen will indicate if errors occurred during processing. When the process is complete, the message “RETURN to continue” will display. Press **ENTER**.

Continue processing the document by writing the document to history (step 3) and deleting the document (step 4).

Part IV - Writing Documents To History

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

Step 1 – Access the Process Corres. Batch (PCB) screen from the main menu to process the document.

Step 2 - At the Batch Process Lookup prompt, enter the name of the batch created in the first step that contains the documents to be written to history.

- To list all of the batches, enter ‘...’ at the batch process lookup prompt.
- Select the batch using the sequence number.
- On the PCB screen, this document name will display as the batch name.

Step 3 - Enter the following information:

- Action – Enter **H**.
- Press **F9** to continue.

Step 4 - The Process Corres. Print Options (PCBP) screen will display.

- Press **F9** and **ENTER** to continue.

Step 5 - The PCB set printer screen will display.

- Enter the following information:
 - Output Device: Enter **H** for hold.
 - Press **F9** and **ENTER** to continue.
 - The background mode screen will display.
 - No changes need to be made.
 - Press **F9** and **ENTER** to continue.

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The process will run. The processing screen will indicate if errors occurred during processing. When the process is complete, the message “RETURN to continue” will display. Press **ENTER**.

After the document is written to history, the batch must be deleted.

Part V – Deleting The Batch

Note: Deleting the batch saves disk space by removing saved lists and all completed letter request records. This also keeps the View Pending Correspondence (VPC) screen clean. Make sure that all pieces of correspondence are processed before deleting the batch.

Step 1 – Access the Process Corres. Batch (PCB) screen from the main menu to process the document.

Step 2 - At the Batch Process Lookup prompt, enter the name of the batch created in the document-processing step that contains the documents to be deleted.

- To list all of the batches, enter ‘...’ at the batch process lookup prompt. Select the batch using the sequence number.
- On the PCB screen, this document name will display as the batch name.

Step 3 - Enter the following information:

- Action – Enter **X**.
- Press **F9** to continue.
- The message “Warning: Deleting a batch will delete selected Letter Request records:” will display.
- Press **F9** to continue.

Step 4 - The Process Corres. Print Options (PCBP) screen will display.

- Press **F9** and **ENTER** to continue.

Step 5 - The PCB set printer screen will display.

Step 6 - Enter the following information:

- Output Device: Enter **H** for hold.
- Press **F9** and **ENTER** to continue.
- The background mode screen will display.
- No changes need to be made.
- Press **F9** and **ENTER** to continue.

The process will run. The processing screen will indicate if errors occurred during processing. When the process is complete, the message “RETURN to continue” will display. Press **ENTER**.

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The document that was processed will no longer display on the VPC screen. If the document still shows up (possibly with errors), resolve the errors. These typically occur from missing addresses.

- Use the DLTR process to delete "errored" batches from the VPC screen instead of reprocessing them. Use caution and narrow selections (To create savedlists to use on DLTR, SELECT LTREQ WITH LTREQ.DOCUMENT.NAME = 'the document name from VPC' AND LTREQ.PRINT.DATE = 'date that shows on VPC') when running this process. A single entry of ADJROVNT entered in #2 will delete all of the ADJROVNT entries when only the one(s) with errors in it on 12/31/02 is the one to be deleted. Keep in mind that this process will delete the entire batch of documents not just the errored ones. For example, if there are 600 documents in the batch and only 2 have errors, all 600 documents will be deleted not just the two with errors. To retain and process the ones without errors, run the PCB process first to generate the document, write to history if necessary. Then run DLTR on the remaining ones to delete those with errors.
- After batches have been deleted using the DLTR process, contact RIS for file indexing.

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Processing from a Saved List on DMP

Responsibility: University

To use “selection criteria” or a saved list to process a document for a group of people, use the Document Merge Process (DMP) screen. 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.

This process may also be used to send email messages. Processing email message using this screen will send the email message immediately. Additionally, it can be used to send single documents that are not a part of a track.

NOTE: It is very important to define your saved.list or selection criteria on this screen. Failure to do so will send emails to all students in your database if a person file was used.

Step 1 – Access the Document Merge Processing (DMP) screen

- At the Document Lookup, enter the Document name to be used.
- The Document Type and Merge File fields display what has been defined on the DOC screen.
- The Document File field displays where the document is stored and the Output File field displays the default output file for this document type.

Step 2 - In the Default File Suite Year,

- Enter the appropriate file suite year for financial aid users.

Step 3 - In the Comm/Code/Status field,

- Enter a communication code and a status that you want to apply to all of the persons on the saved list or selection criteria being used.

Step 4 – Enter an activity, if appropriate

- If this document run is associated with a particular campaign, enter that campaign's ID here.

Step 5 - In the Update History field,

- Enter **Y** if you want to update the person's records as having received this document, or
- Leave this blank if you do not want to update history.

Step 6 - In the Printer field,

- Enter a valid printer name if you need to know this for referential purposes.

Step 6 - In the SAVEDLIST Name field,

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- Enter a valid saved list name. Remember your saved list of query language statement must correlate to the file name defined in the Merge field.

Step 7 - In the Selection Criteria field,

- Create any criteria that you want to use.

Step 8 - In the Dictionary Fields field,

- These fields should come over from your DOC set-up and the DFS screen unless you entered **N** in the Scan Document field on the Document Type Setup (DTYS) screen.

Step 9 – Update the DMP screen.

- If you are sending e-mail, you must select Hold/Browse File Output for the Output Device.

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Clearing Errors

Responsibility: University

To clear errors, access the Saved List Inquiry (SVI) screen.

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) screen.

- The SVID screen displays the ID numbers and names of individuals with errors.

Step 3 - Note the ID numbers (not the key) of the records with errors (do a Print Screen if the list is long).

Step 4 - Exit from the SVID and the SVI screens.

Step 5 - Access the Name and Address Entry (NAE) screen 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 Correspondence (IPC) screen.

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 Correspondence Detail (IPCD) screen displays.

Step 11 - Enter the document name and the print date

- Within the date range that you are processing
- Then save from the IPCD screen.

Step 12 - Verify that the document has been successfully re-entered on the IPC screen,

- Then save from the IPC screen.

Step 13 - Access the Process Correspondence Batch (PCB) screen.

- Type @ to recall the batch on which you were working.

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

Step 15 - When you access PCB, the batch name will no longer exist and you will need to recreate the screen entries (that is, Select Start Date, Select End Date, etc.).

- You will need to run the Select Action on PCB again to re-select the records and then verify that the errors have been cleared.

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