Assigning Communications to an Individual

Trigger:

Concept

You can assign communications to individuals manually, or you can use the 3C engine to automatically assign communications to individuals based on rules and conditions that you define.

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

Consider this scenario: One of the recruiters at your institution mailed promotional material and an application to a prospective student. However, no one documented the outgoing communication. Your goal is to document the outgoing communication by creating a communication record for the prospect.

<table>
<thead>
<tr>
<th>Field(s)</th>
<th>Comments</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Output - Results</th>
<th>Comments</th>
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</table>
Additional Information
Procedure

**Communication Management**
Create or update a communication for a person.

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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>To add a communication to a student, click the <strong>Add a New Value</strong> tab.</td>
</tr>
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</table>
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<tr>
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<tbody>
<tr>
<td>2.</td>
<td>Enter the student id into the <strong>ID</strong> field. Enter &quot;14002639&quot;.</td>
</tr>
</tbody>
</table>

When the magnifying glass icon is next to a field, this means that there is a list of values associated with the field. If the desired value is not known, click on the magnifying glass icon, this will display the List of Values page for the field. From this page you can perform a search to find the value and then select the value by clicking on it.

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>3.</td>
<td>Click the <strong>Add</strong> button.</td>
</tr>
</tbody>
</table>


### Step 4
**Action**

Use the **Communication Management 1** page to assign or view details of a communication to an individual.

If you transferred to this page by clicking the **Communication** button on another page, the administrative function of the functional area of the first page, along with the academic institution and all the variable data associated with the administrative function, transfers here. If you did not transfer here from a functional area, you must enter the function, institution, and variable data.

### Step 5
**Action**

In the **Function** field, specify the code of the functional area that includes this communication. In this example, we will be placing a Student Term communication function on Christoph's account. The code for this function is **STRM**.

**NOTE:** Your ability to add a specific **Function** code is based on your security. You will not have access to all Function codes. Enter the desired information into the **Function** field. Enter "STRM".
6. Click the Variable Data button to access the Variable Data page, where you can view or enter the required variable data associated with the specified function.

**NOTE:** Some function codes do not have variable data associated with them, in these cases the Variable Data button will not become active. Click the Variable Data button.

7. The fields that display on the Variable Data page are contingent on the code that was entered in the Function field.

The code for an undergraduate career is UGRD. Enter the desired information into the Academic Career field. Enter "UGRD".
### Step 8

Enter the desired information into the **Term** field. Enter "**3543**".
### Step 9
Click the **OK** button.

### Step 10
In the **Institution** field, specify the institution responsible for this communication. It defaults to the institution assigned to the ID, but can be modified if needed. In this example, use the default.

### Step 11
In the **Comm Key** field, enter the name of the communication speed key that contains the communication category, communication context, method, direction, and letter code for this communication.

When you select a communication speed key that is valid in your user preferences, the system displays all the values for you. If you do not use a valid communication speed key, you must enter in the following order; the category, context, method, direction, and letter code values manually.

**NOTE:** In this example a Comm Key has not been set up for the Student Term Function, thus requiring you to enter the Category, Context, Method, Direction, and Letter code manually.
### Step 12
Enter the desired category code into the **Category** field.

Enter "HRESLF".

### Step 13
Enter the context code into the **Context** field.

Enter "HPREAP".

### Step 14
Enter the desired information into the **Method** field. Enter "L".

### Step 15
Click the button to the right of the **Direction** field.
<table>
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<tr>
<td>16.</td>
<td>Select the desired value from the drop down list.</td>
</tr>
<tr>
<td></td>
<td>Select <strong>Outgoing Communication</strong> from the list.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
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</tbody>
</table>
| 17.  | Enter the desired letter code into the **Letter Code** field.  

The **Letter Code** defaults based on the communication speed key entered. The letter codes available are those associated with the context and function selected for this communication.  

Enter "H00".  
| 18.  | By default, the **Comm Date** field displays the system's current date. You can override this if needed.  

Enter the desired information into the **Comm Date** field. Enter "05/01/2007".  
| 19.  | If the selected letter code represents a letter that is set up to include enclosures, the system automatically selects the **Include Enclosures** check box for you. You can then click the **Enclosures** button to review, add, or delete the set enclosures.  

If the letter is not set up to include enclosures, you can manually select this check box to include enclosures now, and click the **Enclosures** button to add the desired enclosures. |
### 20. Comments Field

In the **Comments** field, enter comments to further identify or describe the communication for this individual.

If comments are associated with the communication speed key, the system automatically displays them here. You can change these comments or delete them. Click in the **Comments** field.
<table>
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<tbody>
<tr>
<td>21.</td>
<td>Enter the desired comments into the <strong>Comments</strong> field. Enter &quot;<strong>Included promotional material and application with the outgoing letter.</strong>&quot;.</td>
</tr>
<tr>
<td>22.</td>
<td>Select the <strong>Print Comment</strong> check box to print comments on the communication. Click the <strong>Print Comment</strong> option.</td>
</tr>
<tr>
<td>23.</td>
<td>The <strong>Joint Communication</strong> check box is available only if the individual to whom you are assigning the communication has a relationship on the <strong>Relationships</strong> page set to allow joint communications, and if the letter code on the <strong>Standard Letters</strong> page is set to allow joint communications. When available, select this check box to address the communication jointly to this individual and the related individual identified on the <strong>Relationships</strong> page.</td>
</tr>
</tbody>
</table>
### Step 24

Click the **Communication Management 2** tab.
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**Step** | **Action**
---|---
25. | Use the **Communication Management 2** page to enter or review the status of the communication outcome.
26. | When you run the letter generation data extract process, the system automatically completes fields and selects check boxes in the **Communication Outcome** group box to indicate the outcome of the communication. If you do not use the letter generation data extract process, you must complete these fields.
Step | Action
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27. | Select the **Communication Completed** check box to indicate that the communication was successfully completed. For example, the communication is complete if the phone call was made or if the letter was sent. In the case of the letter generation data extract process, the communication is complete if the data was extracted according to the option selected on the run control page.

If you are using a communication speed key, the system might select this check box for you depending on information associated with that Comm Key. Click the **Communication Completed** option.
28. The default for the **Date Activity Completed** field defaults to the current system date, but you can manually override this date if needed.

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

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

30. The **Reason** field is available when the **Unsuccessful Outcome** check box is selected. It indicates the reason that the communication was unsuccessful. For example, if a letter that you sent was returned, you might select Returned Mail as the reason that the communication was unsuccessful. In the case of the letter generation data extract process, the system selects Critical to indicate that the absence of critical data prevented the extract process from completing for this communication.
### Step 31
When you have finished assigning letter communications, you can use the system to extract data about the recipients. You can use your word processing software to merge that data into a template. You create templates with your institution's word processing software, or you can use the sample Microsoft Word templates delivered with myZou Campus Community.

You can now save the details entered.
Click the **Save** button.

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### Step 32
You have successfully assigned a communication to an individual.

**End of Procedure.**