Communication Generation: a practical functional workshop
Alliance Conference 2010
Session 27237
Carol Ruskin
Principal Product Manager
Campus Solutions
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Communication Generation: a practical functional workshop

Agenda

• Overview of Communication Generation – What is it?
• Highlight of Communication Generation features
• A review of each set up component
• Execution of a communication plan with demo at each setup stage
• Reset Communications
• Envelope and Label Generation
Communication Generation

Overview
Overview

Communication Generation - What is it?

• New Feature introduced in CS 9.0
• Relies on underlying 3C structure and Campus Community setup features:
  – Administrative Functions
  – Variable Data
  – COMMON_ID / SA_ID_TYPE
  – Communication setup, assignment, history
  – Usage Tables for Name, Address and Joint Salutation
• An Application Engine process which allows user determination of which fields to extract data from for merge to the communication.
• Leverages fusion integration with XMLP (aka Oracle Business Intelligence) to create and produce the communication
• Expands on the functionality provided by Letter Generation to extract data but is greatly enhanced to support additional features
Overview

Communication Generation - What is it?

- Expands on the functionality provided by Letter Generation to extract data but is greatly enhanced to support additional features:
  - Send communication via email and/or hard copy letter
  - Respect students communication preferences:
    - Preferred Method (*email or letter*)
    - Preferred Language
  - Preview the generated outputs
  - Retrieve generated outputs to allow easy reprint and history tracking
  - Extract only the data needed for a specific template
  - Extract Checklist information from different Administrative Functions
  - Improve Organization communications by selecting the exact contacts/departments/locations
  - Reset communication records after running the Communication Generation process by mistake or in the event of process failure
  - Select a subset of IDs to generate the communications (integrated with Population Selection feature)
  - Generate labels and envelopes
Communication Generation Features
Preferred Communication *Language* and *Method*

- Optional functionality

- Based on *Installation setup*, institutions decide what language they want to support and what method of communication to support *(emails and/or letters)*

- **Self-Service** and **Administrative** users can update communication preferences
Communication Generation Features

Preferred Communication Language and Method

To better communicate with you, tell us in which language and method you prefer receiving communications.

**Preferred Language:**
- FRA - French

**Preferred Communication Method:**
- E - E-Mail

Define Electronic Addresses

SAVE

Self Service --> Campus Personal Information --> Communication Preferences
Communication Generation Features

Preferred Communication Language and Method

Communication Preferences

Jane Brisebois

Preferred Language: FRA French
Preferred Communication Method: E E-Mail

Define Electronic Addresses

Save Return to Search
# Communication Generation Features

Retrieve generated output

## View Communication

**Jim LaTour**

**ID:** CCCG0004

## View Generated Communication

<table>
<thead>
<tr>
<th>Letter Code</th>
<th>Description</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>CG</td>
<td>Communication Generation Test</td>
<td>View</td>
</tr>
<tr>
<td>F01</td>
<td>Frosh Application Acknlgment</td>
<td>View</td>
</tr>
<tr>
<td>F02</td>
<td>Frosh Missing Requirements</td>
<td>View</td>
</tr>
<tr>
<td>REC</td>
<td>Admit Recipient</td>
<td>View</td>
</tr>
</tbody>
</table>
Bonjour Jim PREFERRED,

Merci de votre intérêt pour étudier à PeopleSoft University! Pour compléter votre demande d’admission au programme Liberal Arts Undergraduate, vous devez nous faire parvenir les documents suivants avant la date d’échéance indiquée :

<table>
<thead>
<tr>
<th>Documents manquants</th>
<th>Date d’échéance</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACT/SAT - Please have your results from either the ACT or the SAT</td>
<td>2001-03-01</td>
</tr>
<tr>
<td>PER/STA - A personal statement is required from all applicants.</td>
<td>2001-03-01</td>
</tr>
<tr>
<td>TRANS -</td>
<td>2001-03-01</td>
</tr>
</tbody>
</table>

Vous trouverez ci-joint les documents suivants:
- Fresh Application Acknowledgment (F01)
- Fresh Missing Requirements (F02)
- Business Appl Acknowledgment (B01)
- Admit Recipient (REC)

Si vous avez des questions, s’il-vous-plait contactez le Bureau des admissions au 888-555-1212 en mentionnant votre numéro d’application 00024276.

Salutations,

Barbara Smith
Bureau des admissions

cc Green, Ted
cc Lawrence Black
cc Marie-Jeanne Labelle
## COMMUNICATION GENERATION FEATURES

Retrieve generated output

### Person Communication

<table>
<thead>
<tr>
<th>Name</th>
<th>ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jim LaTour</td>
<td>CCCG0004</td>
</tr>
</tbody>
</table>

### Communication Recipient Data

<table>
<thead>
<tr>
<th>Function</th>
<th>Institution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admissions Application</td>
<td>PeopleSoft University</td>
</tr>
</tbody>
</table>

### Recipient Data

<table>
<thead>
<tr>
<th>Country</th>
<th>Address</th>
<th>Relate Nbr</th>
<th>Related ID</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA United States</td>
<td>123 Marie-Jeanne Labelle HOME Street Apt# CCCG0013 Beverley Hills, CA 90210</td>
<td>1</td>
<td>CCCG0013</td>
<td>Marie-Jeanne Labelle</td>
</tr>
</tbody>
</table>

Email Address: CCCG0013@yahoo.com

View Generated Communication
Communication Generation Features
Organization Communication Recipients

Campus Community → Communications → Organization Communications → Communication Management
Communication Generation Features
Organization Communication Recipients
Communication Generation Features
Organization Communication Recipients

View Recipient Communication

Jim LaTour

<table>
<thead>
<tr>
<th>Letter Code</th>
<th>Description</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>CG0</td>
<td>Comm Generation Org Test</td>
<td></td>
</tr>
<tr>
<td>CG1</td>
<td>Comm Generation Org Test 1</td>
<td></td>
</tr>
<tr>
<td>CG2</td>
<td>Comm Generation Org Test 2</td>
<td></td>
</tr>
</tbody>
</table>
Jim LaTour  
123 Jim Latour MAIL Street  
Apt #CCCG0904  
Chicago, IL 98888  

Constituent ID: CCCG1010  

Date: Mar 7, 2007  

Dear Jim FATHER,  

Thank you for your donation to PeopleSoft University! The money will be used to renovate the Olympic size pool and build a new facility to give public access. With your donation, we are one step forward to be sending PSUNV students to the major competition events! 

Please find enclosed the following documents:  
- Comm Generation Org Test 1 (CG1)  
- Comm Generation Org Test 2 (CG2)  

If you have any questions, please do not hesitate to contact the Sport Department at 888-555-1212 by mentioning the following campaign number ORGCOM.  

Sincerely,  

Joe Fletcher  
Swim Team Official  

cc Mariette Chardal  
cc Registrar Office  
cc Financial Aid Office  
cc Bay Area  
cc Southbay California
## Org Communication Recipient Usage Table

<table>
<thead>
<tr>
<th>Usage Order</th>
<th>Usage Type</th>
<th>Recipient Option</th>
<th>Contact Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Contact</td>
<td>Primary</td>
<td>+</td>
</tr>
<tr>
<td>20</td>
<td>Contact</td>
<td>Preferred</td>
<td>Academic Advisor</td>
</tr>
<tr>
<td>30</td>
<td>Contact</td>
<td>Preferred</td>
<td></td>
</tr>
<tr>
<td>40</td>
<td>Contact</td>
<td>All</td>
<td>Director of Catering</td>
</tr>
<tr>
<td>50</td>
<td>Contact</td>
<td>All</td>
<td></td>
</tr>
<tr>
<td>60</td>
<td>Department</td>
<td>Primary</td>
<td>+</td>
</tr>
<tr>
<td>70</td>
<td>Department</td>
<td>All</td>
<td>+</td>
</tr>
<tr>
<td>80</td>
<td>Location</td>
<td>Primary</td>
<td>+</td>
</tr>
<tr>
<td>90</td>
<td>Location</td>
<td>All</td>
<td>+</td>
</tr>
</tbody>
</table>
Communication Generation Features

Relationships: Communication Recipients + Joint Relationship

Email fields allow sending emails to communication recipients + joint communications.
Setting Up Communication Generation
Setting Up for Communication Generation

Basic Steps

• Step 1: Design your communication plan, some points for consideration:
  
  – What Administrative Function will be used?
  – What data needs to be extracted for merge to your communication?
    • Create a draft template and identify which variables to include.
    • For each variable, identify the corresponding record fields from which to get the data.
  – Does the communication need to be in multiple languages?
  – How will it be sent: email, hard copy or both?
  – Is new communication set up required to support the communication?

• Step 2: Define the Communication Data Source

• Step 3: Create one or more queries or application classes which select the record fields to be used in the communication data source.
Setting Up for Communication Generation

Basic Steps

• **Step 4**: Finalize the template using either the delivered XML Publisher template builder for Microsoft Word to create RTF templates or other software to create other template formats such as PDF by adding the variable tags from the data source.

• **Step 5**: Create a report definition to upload the template and associate it with the communication data source.

• **Step 6**: Associate a letter code with the report definitions that include the templates and communication data sources that you want to make available for generating the communication.
Step 1 Communication Plan
Setting Up for Communication Generation
A Closer Look – creating a new communication for use with Communication Generation

• The communication plan: creating a communication for use in undergraduate recruitment of high achieving students
  – Administrative Function = PROS
  – Letter Code = P04 – President’s Letter
  – Context = PRSLTR
  – Category = UREC
  – 3C Group Access = UADO, UGAD, UADC, UADS
  – Send communication to the prospect with copies to parent(s)
  – Send the communication based upon the prospect’s communication preferences (email or letter)
  – Will want to merge in data from the prospect’s indicated plan interest and provide contact information for the prospect’s assigned recruiter
  – Create draft of the communication, using placeholders for the anticipated merge fields
Setting Up for Communication Generation
A closer look at the various components – Letter Draft

LOGO

First Name Last Name
Address 1
Address 2
City, State, Zip
(Or)
City Country Postal
Student ID: XXXXXXXX

This communication has been sent to Name. You are receiving a copy because you
either requested to receive a copy or the school has designated you to receive a copy
of this type of letter.

March 1, 2009

Dear First Name
The admissions office has informed me of your recent designation as a Referral
Source. Congratulations on this impressive achievement! As a scholar, you may be
interested to explore more about the world class research opportunities available to
our students at Institution. If you would like more information about Acad Plan or
any of our other programs and offerings, please contact our area representative
Recruiter Name at Phone or Email, who will be happy to assist you.

Cordially,

Peter Cushing
President
Peoplesoft University

Cc: Parents
Step 2  Communication
Data Source
Setting Up for Communication Generation
Communication Data Source

Must create the data source on this page: Campus Community > Communications > Set up Communications > Communication Data Source
### Communication Data Source

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Source Map ID</td>
<td>QA_CS_CO_DATASOURCE</td>
</tr>
<tr>
<td>Description</td>
<td>Communication Data Source</td>
</tr>
<tr>
<td>Object Owner ID</td>
<td>Campus Community</td>
</tr>
<tr>
<td>Data Source Type</td>
<td>XMLDoc Object</td>
</tr>
<tr>
<td>Active</td>
<td>Yes</td>
</tr>
<tr>
<td>Administrative Function</td>
<td>ACRA, Admissions Application</td>
</tr>
</tbody>
</table>

#### Generic Process Data

<table>
<thead>
<tr>
<th>Sequence</th>
<th>Description</th>
<th>Sample Data Folder Name</th>
<th>Critical Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>List of Check List Items</td>
<td>CHECKLIST_ITEMS</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>List of Envelopes</td>
<td>ENCLOSED</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Address for a person</td>
<td>PER_ADDRESS</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>List of Person/Communication Recipients</td>
<td>PER_COMM_RECV</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Email Address for Person</td>
<td>PER_EMAIL</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Name for individual address</td>
<td>PER_NAME_ADDR</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Name for extra use</td>
<td>PER_NAME_EXTRA</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Name for individual calculation</td>
<td>PER_NAME_BAL</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Name for joint calculation</td>
<td>PER_NAME_BALINT</td>
<td></td>
</tr>
</tbody>
</table>

#### Custom Extract Data

<table>
<thead>
<tr>
<th>Sequence</th>
<th>Type</th>
<th>Query Name</th>
<th>Max Length</th>
<th>Application Class</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Query</td>
<td>USA_CS_CO_COMMUTN_CO_ACRA</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Registered Data Time**: 07/27/06 1:34:45PM  
**Registered By**: PS

- **View/Download Sample Data File**

---

**Once Data Source is registered, a link is available to view the XML sample file.**

**Changes to the underlying queries will require you to re-register the data source.**

**Download the sample file for use in creating communication template.**

---

**Must create the data source on this page:** Campus Community > Communications > Set up Communications > Communication Data Source
Using the link, a new window opens and you can view the XML files and various fields from which data will be extracted. Save this file to a local directory to use in creating the communication template.
Setting Up for Communication Generation
Creating the Communication Data Source

• Demo
  – Look at generic data to be utilized
  – What other fields do we need to extract data in our custom query?
Step 3 Queries for Communication Data Source
Communication Data Source

Defining queries to be used in the data source

• Several ‘rules’ must be met to enable a query for use within the Communication Data Source
  – Query must be based on the administrative function used in the Communication Data Source set up.
    • Example, Communication Data Source uses administrative function ADMP, then the query must include ADM_APPL_PROG record.

• Minimally you must include at least a query prompt that retrieves person ID or organization ID or a combination of the two from the underlying administrative function record.
  – Create query prompts and add them as criteria to your query definition. The process can accept only query prompts for retrieving person and organization IDs as noted in #2 and their variable data associated with the administrative function that is specified in the communication data source.

• The query defines the ‘what’ – from what additional data fields the process should extract data to merge to the communication. This query does not define the ‘who’ should receive the communication.
Communication Data Source

Defining queries to be used in the data source

- For the prompts used in the query, a Unique Prompt Name must be created. You populate the Unique Prompt Name by clicking the Edit button on the corresponding Prompts page of the Query Manager component, and change the value in the Unique Prompt Name field to a value that will prompt for the desired data. This is the only way the process will know what data to pass to the prompt list.
  
  - a) For Person ID prompts, the unique prompt name must be: PERSON_ID. The typical key field for persons in transaction tables is emplID. However, entering PERSON_ID enables the process to select person data from tables with a different person ID key field. The process searches for PERSON_ID and assigns the COMMON_ID for person communications to the query prompt.
  
  - b) To prompt for organization ID, enter the Unique Prompt Name of ORG_ID. The typical key field for organizations in transaction tables is EXT_ORG_ID. However, entering ORG_ID enables the process to select organization data from tables with a different organization ID key field. The process searches for ORG_ID and assigns the COMMON_ID for organization communications to the query prompt.
  
  - c) To prompt for both person and organization ID, enter the Unique Prompt Name of COMMON_ID. The typical key field used in shared transaction tables is COMMON_ID. Entering COMMON_ID enables the process to select person and organization data from shared tables with a different common ID key field. The process searches for COMMON_ID and assigns the COMMON_ID for person and organization communications to the query prompt. The process uses the SA_ID_TYPE field at run time to place the COMMON_ID for the communication into the correct person or organization query prompt field.
Setting Up for Communication Generation

Communication Data Source – creating the queries for the P04 letter

• To get the custom data needed to merge to the letter, we will create 2 queries.
  – Since the communication P04 is based on administrative function PROS, ADM_PRSPCT_CAR must be included in the queries

• Query 1 – get prospect program and plan information
  – Create a prompt on ADM_PRSPCT_CAR.EMPLID
  – Also join on records:
    • ADM_PRSPCT_PROG
    • ADM_PRSPCT_PLAN
    • ACAD_PLAN_TBL
    • INSTITUTION_TBL

• Query 2 - get recruiter information:
  – ADM_PRSPCT_CAR (with prompt on EMPLID)
  – Also join on records:
    • NAMES
    • PERSONAL_PHONE
    • PERSON_EMAIL
Setting Up for Communication Generation

Creating the Queries

• Demo
  – Create two queries for use in the Communication Data Source we created
  – Add the queries as our custom data to the Communication Data Source
Step 4  Template Creation
Setting Up for Communication Generation
Creating the RTF templates

• To create RTF templates using Microsoft Word, must have the XMLP Template Builder Plug-in installed.
  – You can download the plug-in from either:
    • Reporting Tools, XML Publisher, Setup, Design Helper page
    • Oracle BI Publisher Downloads Page: http://www.oracle.com/technology/software/products/publishing/index.html
      – Certification and documentation is also available on this page
  • Download and installation takes about 15-20 minutes. A tutorial and samples are included with the installation.
Setting Up for Communication Generation

Creating the RTF templates

• The Template Builder is an extension to Microsoft Word that simplifies the development of RTF templates. The Template Builder is tightly integrated with Microsoft Word and allows you to perform the following functions:
  – Insert data fields
  – Insert data-driven tables
  – Insert data-driven forms
  – Insert data-driven charts
  – Preview your template with sample XML data
  – Browse and update the content of form fields
  – Extract boilerplate text into an XLIFF translation file and test translations

• Leverages many of Word’s native formatting features

• When designing, consider cloning an existing template which would use common data fields (Name, Address) or using a sub-template which can contain common elements.
Setting Up for Communication Generation
Creating the RTF templates

Using Microsoft Word

Template Designer Menu

<table>
<thead>
<tr>
<th>Data</th>
<th>Insert</th>
<th>Preview</th>
<th>Tools</th>
<th>Help</th>
</tr>
</thead>
<tbody>
<tr>
<td>Load XML Data</td>
<td>Field</td>
<td>PDF</td>
<td>Field Browser</td>
<td>Oracle Template</td>
</tr>
<tr>
<td>Load XML Schema</td>
<td>Table/Form</td>
<td>HTML</td>
<td>Validate</td>
<td>Builder Help</td>
</tr>
<tr>
<td>Load Report</td>
<td>Chart</td>
<td>EXCEL</td>
<td>Translation</td>
<td>About Template</td>
</tr>
<tr>
<td>SQL Report Wizard</td>
<td>All Fields</td>
<td>RTF</td>
<td>Export</td>
<td>Builder</td>
</tr>
</tbody>
</table>

- The RTF document can be created in Microsoft Word and saved as an RTF file. You will use the Template Builder function to Load XML Sample Data to associate a sample data file with this template.

- The sample data file provides the tags necessary to map fields into your document.

- The Template Designer is used with the Oracle XML Publisher stand-alone product, therefore many of the menu options are not used with the PeopleSoft integration.
Setting Up for Communication Generation

Creating the RTF templates – Loading the Sample XML Data

Loading Sample XML Data

When the sample data has been loaded, you will not see the data displayed until you select one of the insert options.

To load the sample XML data:
1. In Microsoft Word, select Data, Load XML Data.
2. Select the XML sample data file.
3. You will receive a message that the data was successfully loaded.
4. Click OK.
Once the sample XML data file is loaded, you can begin to add in fields to create or modify your existing RTF document.

Inserting Fields

To insert fields into the Word document:
1. Select Insert, Field.
2. Position the cursor where you want to insert the field.
3. Select the field from the Field Dialog box.
4. Click Insert.

You can also double-click the field in the dialog box to insert the field.
You can either select another data field or close the dialog by clicking the Close button.
Setting Up for Communication Generation

Creating the RTF templates

Once the sample XML data file is loaded, you can begin to add in fields to create or modify your existing RTF document

• Some additional guidelines
  – Your template content and layout must correspond to the content and hierarchy of the input XML.
  – Each data field in your template must map to an element in the XML file.
  – Each group of repeating elements in your template must correspond to a parent-child relationship in the XML file.
Setting Up for Communication Generation
Creating the RTF templates – inserting fields

Field Dialog Box

- The Field dialog box shows the structure of the data in a tree view.
- Select a field that represents a single data field (a leaf of the tree) and click insert. A text form field with hidden XML Publisher commands (in the help text of the form field) is inserted at the cursor position in the template.
- Double-click on an inserted field and select Add Help Text. The name of the field has been inserted.
Form fields are shaded

```
Student ID: fld_COMMON_ID
```
Setting Up for Communication Generation
Creating the RTF templates – looking at Form Fields

Double-clicking on a Form Field

Opens the Text Form Field Options box and makes the link to Add Help Text

Help text field allows for further definition of attributes
Setting Up for Communication Generation
Creating the RTF templates – Preview Data

• You can preview your output in PDF, RTF, HTML, Excel
• Preview is essential before finalizing your template and proceeding to create the Report Definition and uploading your template to the definition.
  – Troubleshooting – catch any errors in syntax
  – Design – get a better idea of how your communication will actually look.
Setting Up for Communication Generation
Creating the RTF templates and…Sub-Templates!

- Sub-templates can contain common formatting, data fields and images that may be used in multiple templates – *reusability*
- A single sub-template file may contain multiple sub-templates.
- Start and end template indicators must exist to distinguish those various components, where `component_name` equals the name you gave your sub-template:

```
<template:component_name/>
<end template/>
```
Setting Up for Communication Generation
Creating the RTF templates and…Sub-Templates!

- If you are using a sub-template, you need to reference it at the top of your template:
  - `<?import:psxmlp://CJR_TEST_STMPLT2?>`

- However, for testing while in Template Builder, you need to reference a local path for the sub-template:
  - `<!import:file:///C:\Documents and Settings\CRUSKIN\CS product analysis\3Cs\Template examples/CJR_TEST_STMPLT2.rtf?>`

- Swapping out the `<? For <! comments out the line`
Setting Up for Communication Generation

Creating the RTF templates

- Demo – creating the President’s letter (P04) template
  - Inserting fields
  - Using text form fields and help text
  - Utilizing sub-templates
  - Testing and preview
Step 5

Report Definition
Setting Up for Communication Generation
Creating the Report Definition

- Report definitions are used to:
  - Associate a data source with a template.
  - Define output options.
  - Grant security to view report.
  - Define bursting options.
# Setting Up for Communication Generation

## Report Definition Pages

<table>
<thead>
<tr>
<th>Page</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Definition</td>
<td>Identifies the data source and report name. Properties define the report status, report category and template type.</td>
</tr>
<tr>
<td>Template</td>
<td>Identifies the templates associated with the report. As well the channels (web posting, printer, fax, and so on) associated with the specific template.</td>
</tr>
<tr>
<td>Output</td>
<td>Identifies the output options that will be available when the reports is run.</td>
</tr>
<tr>
<td>Security</td>
<td>Identifies by role or user ID who can view the report once it has been run.</td>
</tr>
<tr>
<td>Bursting</td>
<td>Identifies bursting rules when this feature is used to generate report results in separate output files when bursted reports are run through Process Scheduler.</td>
</tr>
</tbody>
</table>

*Reporting Tools → XML Publisher → Report Definition*
### Setting Up for Communication Generation

#### Report Definition Page

<table>
<thead>
<tr>
<th><strong>Definition</strong></th>
<th><strong>Template</strong></th>
<th><strong>Output</strong></th>
<th><strong>Security</strong></th>
<th><strong>Bursting</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Name:</td>
<td>QA_CS01REPO</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>DataSource</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DataSource Type:</td>
<td>XMLDoc Object</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DataSource ID:</td>
<td>QA_CS01REPO</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DataSource Description:</td>
<td>CommGen CG Datasource</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Report Properties**

- **Report Description:** F01 Report
- **Report Status:** Active
- **Report Category/ID:** ALLUSER
- **Object Owner ID:** Campus Community
- **Template Type:** RTF
- **Days Before Purge:** 0
- **Registered Date/Time:** 07/27/2006 1:40:41 AM
- **Registered By:** PS
- **Updated Date/Time:** 11/21/2007 7:22:47 AM
- **Updated By:** PPLSOFT

**Download:**
- [Data Schema](#)
- [Sample Data](#)

---

- **For Communication Generation,** the Data Source Type must be **XMLDoc Object**
- Status must be **Active** in order to run the report
- The template type cannot be changed once you save the report definition
- You can download the sample data file for template creation

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Setting Up for Communication Generation

Report Template Page

Template description is generated

Multiple templates can be assigned

web posting, printer, fax, email

Multiple effective-dated templates can be assigned.

The preview button uses the sample xml data file to generate report output

At least one template must be active in order to save a report definition

Use this button to upload an existing template
For Communication Generation output for printing is limited to PDF, email is HTML
Setting Up for Communication Generation
Report Security Page

• Use the Security page to:
  – Indicate whether the report requestor can add to the standard *Distribute To* values on the Process Scheduler Request, Distribution Detail page.
  – Define the roles or users who can:
    • View web-posted output in the Report Manager repository.
    • Use the XML Publisher Report Repository Search page.
Setting Up for Communication Generation
Registering the Sub-template

• If using a sub-template, must be registered in the Content Library (Reporting Tools > XML Publisher > Content Library)

• The Content Library is a component provided for the registration of reusable sub-template files
Setting Up for Communication Generation
Registering the Sub-template

• Sub-template files are:
  – Independently stored.
  – Not registered in association with a data source or primary template.
  – Not exposed to the end user at either report design time or runtime.

• When adding a new sub-template ID, it MUST be the same as the sub-template name used in your import line of your template:

```xml
<?import:psxmlp://ALL_SBTMPLT?>
```

• Note: There is no method for viewing which report templates include which sub-templates. This means that users must be careful about changing, deleting, or inactivating sub-templates.
Setting Up for Communication Generation
Registering the Sub-template and Creating the Report Definition and

• Demo – Registering the sub-template in the Content Library

• Demo – Report Definition for President’s letter (P04)
  – Uploading the templates
  – Previewing
  – Downloading templates
Setting Up for Communication Generation
Updating/Creating the Letter Code with the Report Definition

Letter can be used for Person or Organization

Must be set to Softcopy in order to make available the Define Comm Gen Parameters checkbox

Report selection will be limited to reports where the admin function for the CG data source is equal to the letter code admin function

Can tie multiple reports for use with the letter code
Setting Up for Communication Generation
Incorporating enclosures for use with the Communication

Checking “Include Enclosures” displays the Enclosures box.

Enclosure Codes are simply other Letter Codes that have been established. Selection is limited to those within the same admin function. For use with Communication Generation, that Code must have a report definition tied to it. Multiple enclosures can exist to a max of 10.
Demo
  • Linking the Report Definition created previously to a letter code
Producing the Communication
Assign the Communication

• Manually
• 3C Engine
  – Online triggers
  – Batch
    • Population Selection
    • Mass Change
    • System triggers
Running Communication Generation
Run Control – Selection Parameters Page

ID selection allows for:
- All IDs
- One Person ID
- One Org ID
- All Org IDs
- All Person ID

or can use Population Selection

Since multiple reports can exist for one Letter Code, link allows you to select which report to use at run time.
Enclosure Code set as softcopy will populate from the letter code selection.

Direct the process what action to take if a template that matches other process parameters are not found.

Reloads enclosures that may have been added after the run control’s last run.

Language and Method usages allow you to accommodate the recipient’s communication preferences.
Running Communication Generation

Run Control – Email Parameters Page

Reply to, Sender, Bounce to are optional, provide additional controls over management of email

Importance and Sensitivity are options to use in the transmission for display to the recipient
Running Communication Generation

• Demo
  • Running Communication Generation for the P04 President’s Letter
  • Looking at generated output
  • Viewing Communication Data online
Reset Communication Generation Process
Reset Communication Generation process

Main Menu > Campus Community > Communications > Reset Communication

Reset Communication Generation Process

Run Control ID: DEMO
Process Instance: 571
Run Date/Time: 03/07/2007 10:37:36PM
Run Status: Success

[Reset]

ID Selection
ID Selection: One Person ID
Person ID: CCCG0001

[Reset]

Communication Outcome
Communication Generation Date:
- Communication Completed
- Unsuccessful Outcome

Date Activity Completed:
Reason:

Language Used
Method Used
Process Used
Generating Envelopes and Labels
Communication Generation
Envelope and Label Generation

- Envelopes and Labels require same setup for letter communication
  - Communication Data Source
  - Template
  - Report Definition
- Can be generated as an option on the Communication Generation run control, process parameters page
- Or as a separate process through the Envelope and Label Generation component
Communication Generation
Envelope and Label Generation

Process Instance for communications previously generated. Letter code is grayed when process instance is populated.

When Letter Code populated for communications not completed, date range fields are made available.

Main Menu > Campus Community > Communications > Envelope and Label Generation
<table>
<thead>
<tr>
<th>Communication Processing Dates</th>
<th>Update Communication Generation Date With</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update Communication Completed Date With</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Person Communication Usage</th>
<th>Address:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salutation Name:</td>
<td>Extra Name:</td>
</tr>
<tr>
<td>Joint Name:</td>
<td>Org Recipient:</td>
</tr>
<tr>
<td>Org Contact Name:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Communication Usage Settings</th>
<th>Online Preview</th>
<th>Send to File</th>
<th>Send to Printer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country</td>
<td>Postal</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Output Settings</th>
<th>Complete Communication</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete Communication</td>
<td></td>
</tr>
</tbody>
</table>

| Run Control ID: | C-R_F 0.04 |

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More on XMLP Template formatting
Formatting Date Fields Using Oracle XMLP Template Builder for Word

• When creating a letter or document, dates can be formatted in Template Builder by using one of the following methods:
  – Specify an explicit date format mask using Microsoft Word’s native date format mask.
  – Specify an explicit date format mask using Oracle’s format-date function.
  – Specify an abstract date format mask using Oracle’s abstract date format masks. (Recommended for multilingual templates.)

• Only one method should be used. If both the Oracle and MS format masks are specified, the data will be formatted twice causing unexpected behavior.

• Comprehensive details regarding date formatting can be found in Chapter 2, “Creating an RTF Template” of the Oracle XML Publisher Core Components Guide (Release 5.6.X). The methods described in the guide allow flexibility in determining date formatting to meet end user needs and to support multilingual environments.

• Known issue: XMLP Formatting of Date fields in Winword Template causes the date to be changed by -1 day. (Resolved in Incident 1786365000 – affects 8.48.14+, 8.49.08+)
  – Workaround is to use the Oracle abstract formatting mask
    ```xml
    <?format-date:fld_TRANS_DT_FROM;'M/dd/yyyy';'UTC'>
    ```
More on XMLP Template formatting

Formatting Date Fields Using Oracle XMLP Template Builder for Word

- Use the Form Field Help Text function to transform date to desired format:

\[ \text{Date: } \text{fld.LETTER.PRINTED.DT} \]
More on XMLP Template formatting

Images

• Images
  – Direct insertion: Insert the jpg, gif, or png image directly in your template
    – best for hard copy communications
  – URL reference:
    • The best choice for email communications
    • Image must reside on a publicly accessible server
    • Insert a dummy image in your template. Right click on the picture and select Format Picture
      – In Microsoft Word 2000 or 2003, in the Format Picture dialog box select the Web tab. Enter the following syntax in the Alternative text region to reference the image URL: url:{'http://image location’}
        • For example, enter:
          url:{’http://www.oracle.com/images/ora_log.gif’}
      – In Microsoft Word 2007, use the Alt Text tab, enter the reference to the image URL in the Alternative Text box.
More on XMLP Template formatting

IF statements and Decode function

• IF-THEN-ELSE

IF X=0 THEN
  Y=2
ELSE
  Y=3
END IF

• Decode function – act like IF-THEN-ELSE useful when you want to transform 'codes' into words:

<%xdofx:decode(A.ADM_REFRL_SRCE,'NMSH','National Merit Scholar','SMSH','Smedley Scholar', 'Scholar')%>
More on XMLP Template formatting

Choose statements

- Choose statements – allows for reusability for items like signatures, text

```xml
< ?choose:?
< ?when:FIELD_NAME = 'XXX'?>
    content
< ?end when?>
< ?otherwise:?> content < ?end otherwise?>
< ?end choose?>
```
Resources


  - Links to downloads for the XMLP Template Builder
  - Forum
  - Tutorials and sample reports
  - Oracle XML Publisher Core Components Guide (Release 5.6.X – see Knowledge Doc ID 751540.1 for a current listing of available documentation)

- Knowledge Management Doc ID 10680791.1 Communication Generation White Paper
Questions?

Don’t forget to submit your session evaluations at Alliance online!
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- Call for Papers for Oracle OpenWorld and Develop: March 2 – March 21
  - Available through Oracle.com/openworld
- For more information or to register go to www.oracle.com/openworld