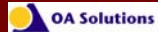


Effortless Communication with Applicants: Set up and Automate the Admissions Missing Items Letter



NWDUG
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Emily Carr Institute of Art and Design
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Overview of Session

This Session Covers How To:

- Create Communication Codes
- Create a Correspondence Request (Request List) of Application Items
- Set up the Missing Items Letter
- Automate the Assignment of the Missing Items Letter and the Request List

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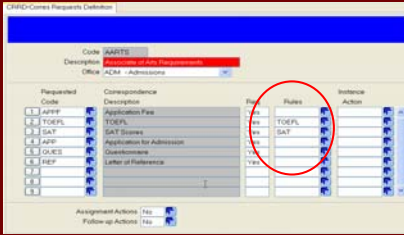
Brief Overview of Communications Management (CC)

- Incoming Communication Codes (CMCs)
- Outgoing Communication Codes (DOCs)
- Communication Codes that act as "triggers" or "catalysts"
- Correspondence Requests (CRRDs)
- Document Tracks (TRCs)
- Automation using ATRK – Admission Tracking Rules

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Correspondence Request: Using Rules to Limit Assignment of Codes (CRRD→RLDE)

- Communication codes in a correspondence request can be assigned to a record based on rules.



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Correspondence Request Rule Example: Rule for TOEFL - Test of English as a Foreign Language

- The TOEFL code will only be assigned as part of the Correspondence Request when the rule evaluates to true.



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Set up the Document (DOC): AAMISS Associate of Arts Missing Items Letter

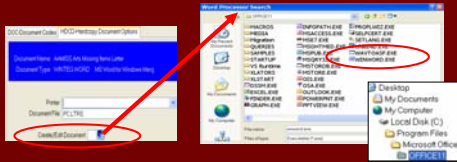
- Doc Type: Winteg.Word
- Office Code: Admissions
- Author is the Editor
- History Type: Code
- Send Multiple: Yes
- Print Day: Daily
- Merge File: LTREQ



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Set Up Document: Navigate to WINWORD.EXE (Create/Edit Document)

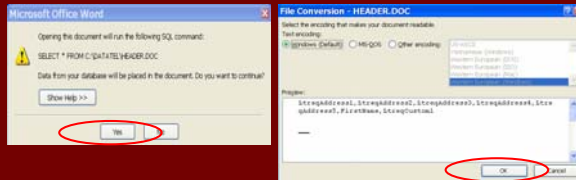
- Detail on Create/Edit Document
- Navigate to (WINWORD.EXE) one time only per PC.



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Set up Document: Header Doc

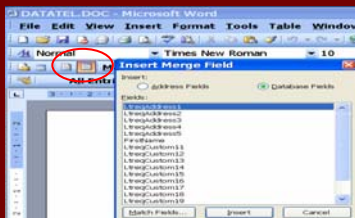
- The header document is automatically created in Colleague as part of the document setup.
- Choose YES on the Microsoft Office Word box to have data from your database placed in the document.
- Choose OK in the File Conversion HEADER.DOC window.



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Document Set Up: Insert Merge Fields (Microsoft Word)

- Select the Merge Fields icon
- Insert merge fields into the document by highlighting and inserting each field.



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After ATRK Rules are Evaluated

- The Correspondence Request List for Associate of Arts is added.
- The Associate of Arts Missing Items Letter is assigned.
- You are ready to process and send the letters!

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Questions?



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