

STATE OF NORTH DAKOTA

CAMPUS COMMUNITY

3C ENGINE

**TRIGGER TABLE, MASS CHANGE, AND
MANAGE DUPLICATE ASSIGNMENT**

TRAINING MANUAL

VERSION 8.0

Disclaimer

Written by MAXIMUS-ERP Solutions Group, May 2004.

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3C ENGINE

OVERVIEW

This process enables you to insert or update communications, comments, and checklists records as you interact with students and/or employees.

This process occurs when you want to insert defined checklists, communications, or comments for prospects as you enter new admissions prospects to your system. You can also update checklist records as needed.

To use the 3C engine, you use administrative functions and detail data to define the rules (called engine events) to identify the sets of communication, checklists, and comments records that you want the engine to enter or update for you. Then, either you set your own conditions (called triggers) to invoke the action of entering or updating your 3C records or use the predefined triggers delivered with your system.

Online triggers are conditions that you define to indicate when to invoke 3C engine processing. You can define triggers to occur in real-time or to store in a trigger table for background processing later. Triggers are table specific. They identify record or field level conditions and associate the 3C engine event definition to use when the trigger conditions are met by creating, changing, or deleting data in your system.

The 3C Engine is a rules-based PeopleSoft application engine that you can integrate with functional transactions to automatically insert or update communications, comments, and checklists records as you interact with students, suppliers, and employees. For example, you can eliminate the need to manually enter 3C information by setting the 3C engine to automatically insert defined checklists, communications, and comments for prospects as you enter

new admission prospects to your system.

Appropriate security must be given to those who run 3C's Engine Triggers.

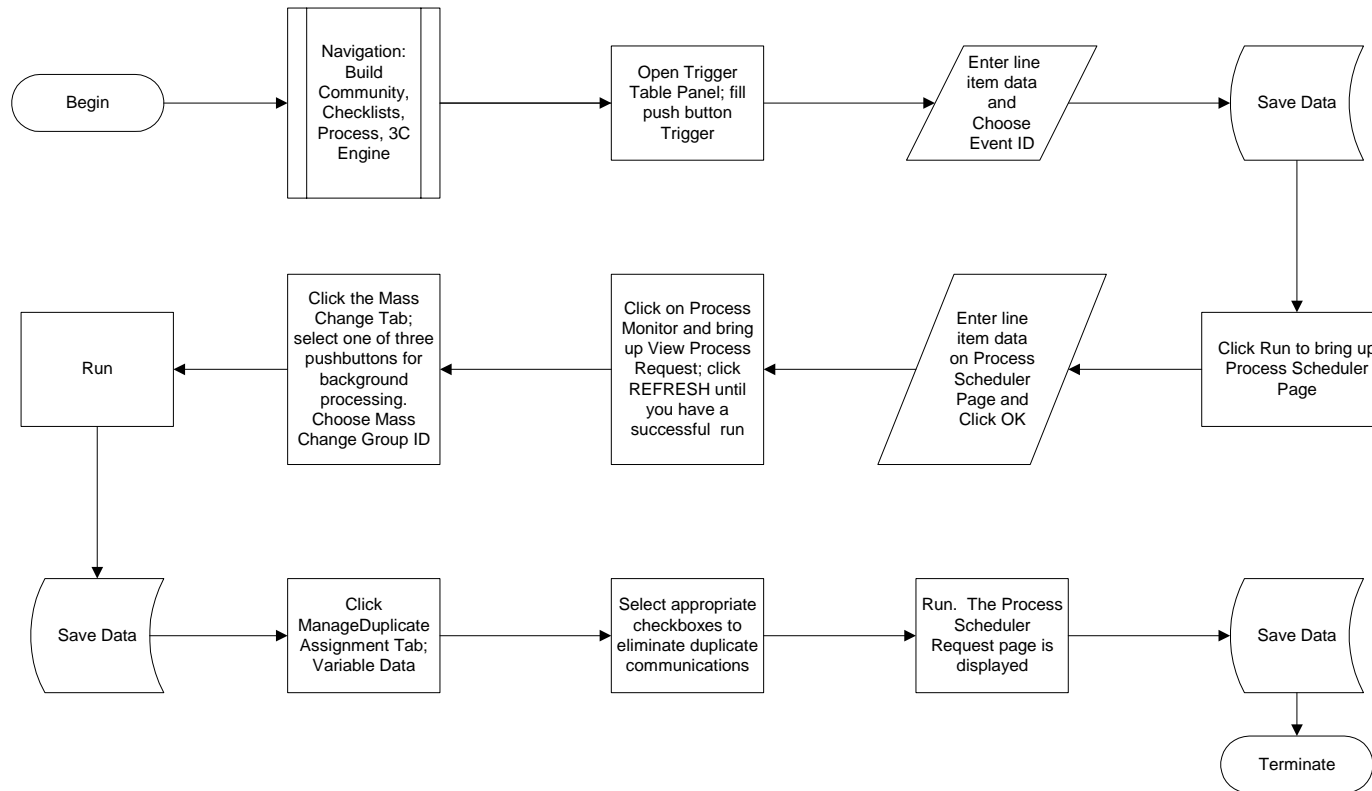
OBJECTIVES

After completing this section, you will be able to:

1. Select the events for the 3C engine process to process in the background.
2. Specify mass change parameters to update communications.
3. Specify conditions for preventing duplicate communication assignment.

3C ENGINE BUSINESS PROCESS FLOW

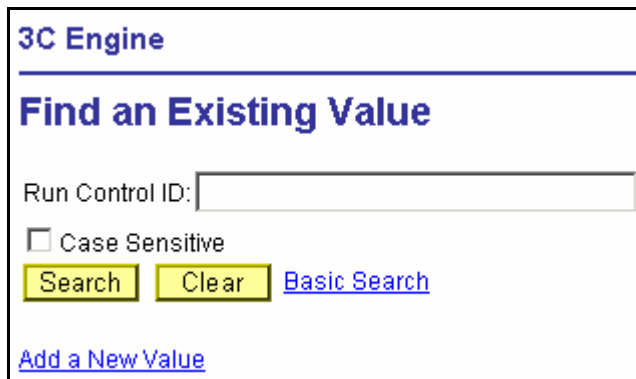
This business process enables you to insert or update communication, comment, and checklist records as you interact with students and/or employees.



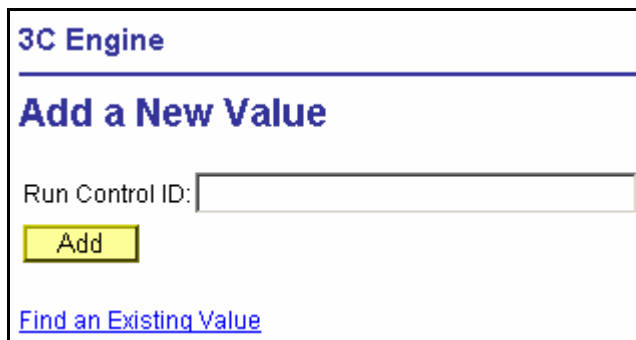
WALKTHROUGH – 3C ENGINE TRIGGER TABLE

Prior to running this process, the checklists, comments, and events need to be in the system. Users must be familiar with checklists, events, etc.

1. **Navigation:** Home > Build Community > Checklists > Process > 3C Engine
2. **3C Engine, Find an Existing Value** page is displayed.



3. **Find an Existing Value**
 - a. Enter an existing Run Control ID or click **Search**.
 - b. A list of values that meet your search criteria will be displayed.
 - c. Click on the ID that you wish to process.
4. **OR** select [Add a New Value](#).



5. **ID:** Enter a new ID.
6. Click **Add**.

TRIGGER TABLE

1. The **Trigger Table** page is displayed.
2. This table defines the events for the 3C engine process to execute in the background.

PROCESS 3Cs

1. **Both**: Select to indicate that the 3C engine background process should process, in the background, both the rows on the Trigger Result page in the background, and the mass change group ID data specified on the Mass Change page in the component.
2. **Trigger**: Select to indicate that the 3C engine background process should process, in the background, only the rows on the Trigger Result page.
3. **Mass Change**: Select to indicate that the 3C engine background process should process in the background, the mass change group ID data specified on the Mass Change page in this component.

EVENT SELECTION

Event Selection

Academic Institution:

Administrative Function:

Event ID:

1. **Academic Institution:** Enter the institution or select the institution from the lookup table. This is the institution whose data that this program should process.
2. **Administrative Function:** Enter the function or select the function from the lookup table. This is the administrative functional area of the data that this program should process.
3. **Event ID:** Enter the ID or select the ID from the lookup table. This is the 3C engine event ID that this program should process.

JOINT PROCESSING

Joint Processing

No

Yes, all Joint IDs

Yes, if match exists

1. **No:** Do not apply joint communication rules in this process.
2. **Yes, all Joint IDs:** Include all communications set to allow joint communications.
3. **Yes, if match exists:** Include joint communications only when date in the variable data fields match.

COMMUNICATION KEY

1. The Communication Key will be populated upon entering an Event ID. Specify the Comm Key for the communication that this program should add or update.

CHECKLIST CODE

1. Specify the checklist code that this program should add or update.

CHECKLIST ITEM


1. Specify the checklist item that this program should add or update.
2. Click **SAVE** to commit your changes to the database.
3. Click **Run**.

PROCESS SCHEDULER REQUEST

1. The Process Scheduler Request page is displayed.

Process Scheduler Request

User ID: _____ Run Control ID: 123


Server Name: Run Date: 

Recurrence: Run Time:

Time Zone: **Reset to Current Date/Time**

Select	Description	Process Name	Process Type	*Type	*Format
<input type="checkbox"/>	3C ENGINE	3CENGINE	Application Engine	(None)	(None)
<input type="checkbox"/>	3C Engine Trigger Batch Job	ND_3CENG	PSJob	(None)	(None)
<input type="checkbox"/>	3C ENGINE	3CENGINE	Application Engine	(None)	(None)

OK **Cancel**

2. **Server Name:** Select **PSNT** from the drop list.
3. **Recurrence:** Select the recurrence from the drop list.
4. **Time Zone:** Select **CST** from the drop list.
5. **Run Date:** Enter the run date or click  to select a date from the calendar.
6. **Run Time:** The run time defaults from the options selected. To override the run time enter a new run time.
7. Click **Reset to Current Date/Time** to reset the date to the current date and current time.
8. Click **OK**.

PROCESS LIST

1. **Select:** Check the box to select the process.
2. **Type:** Select the type from the drop list. Options to select from are Email, File, Printer, or Web.
3. **Format:** Select the format from the drop list.

- Click to display the **Distribution Detail** page.

Distribution Detail

Process Name: 3CEENGINE

Process Type: Application Engine

Distribute To

ID Type	*Distribution ID
User	

Email Only

Email Subject:

Message Text:

Email With Log

Email Address List:

OK Cancel

DISTRIBUTION DETAIL

- ID Type:** Select the ID type from options available in the drop list.
- Distribution ID:** Select the Distribution ID from the lookup list.
- Click to delete the distribution detail information on that line. A message will be displayed to confirm the delete.

Microsoft Internet Explorer

Delete current/selected rows from this page? The delete will occur when the transaction is saved.

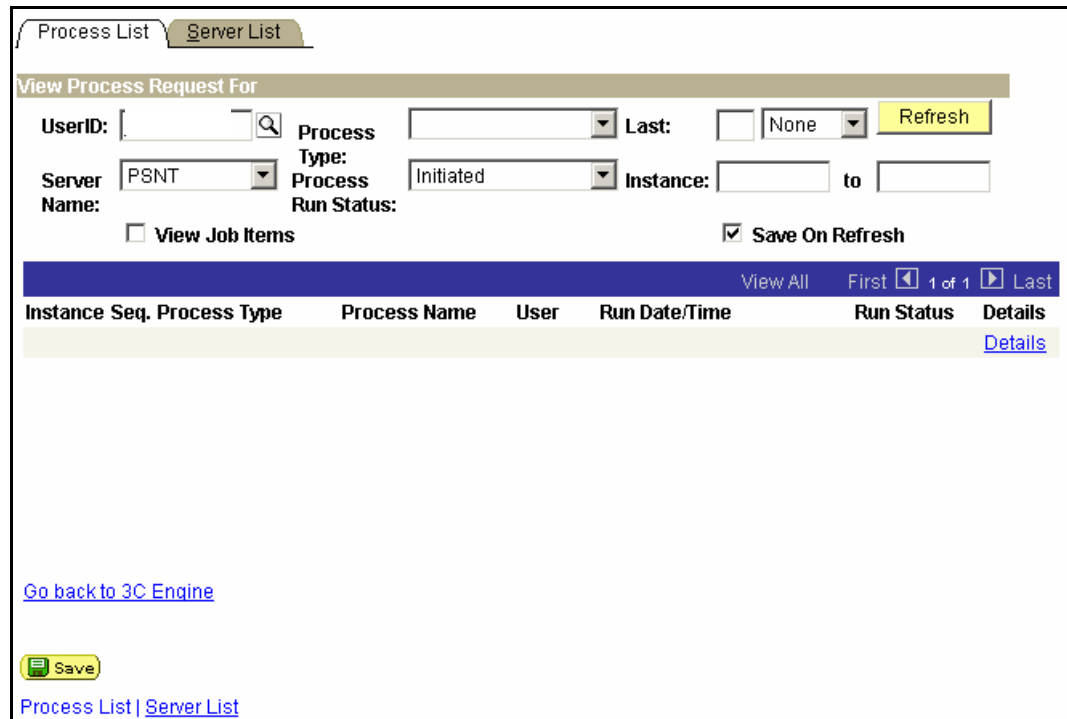
OK Cancel

- Click **OK** to continue with the delete of the distribution detail information.

5. Click **+** to insert additional distribution information.
6. Enter **Email Only** details as needed.
7. Click **OK** to return to the **Process Scheduler Request** page.
8. Click **OK** to return to the **Trigger Table** page.

PROCESS MONITOR

1. Click [Process Monitor](#) to display the **Process List** page.

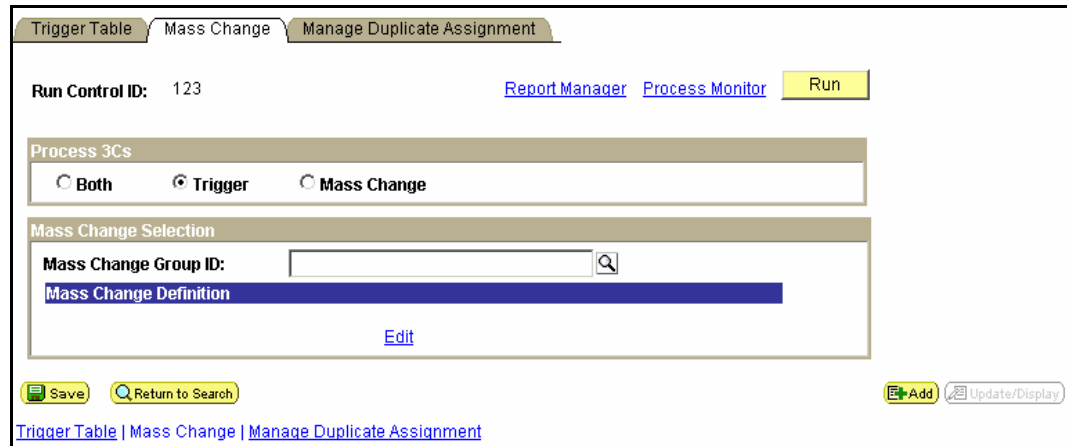


The screenshot shows the 'Process List' tab selected. The search area includes fields for 'UserID', 'Process Type' (set to 'Initiated'), 'Server Name' (set to 'PSNT'), and 'Run Status' (set to 'Initiated'). There is a 'Refresh' button and a 'Save On Refresh' checkbox. Below the search area is a table with the following columns: Instance, Seq., Process Type, Process Name, User, Run Date/Time, Run Status, and Details. The table contains one row with the 'Run Status' column highlighted in blue. At the bottom of the page, there is a 'Go back to 3C Engine' link and a 'Save' button.

2. **Run Status:** Check the status of your report and process instance. Run Status will indicate whether it has been posted or run successfully.
3. Click **Refresh** until you have a successful run.
4. After run status changes to **SUCCESS**, click [Details](#).
5. The **Process Detail** page is displayed.
6. View the details and then click [Go back to 3C Engine](#) to return to the **Trigger Table** page.

WALKTHROUGH – 3C ENGINE MASS CHANGE

1. Click the **Mass Change** Tab.



PROCESS 3Cs

1. **Both:** Select this option to indicate that the 3C engine background process should execute, in the background, both the rows on the Trigger Result page in the background, and the mass change group ID data specified on the Mass Change page in this component.
2. **Trigger:** Select this option to indicate that the 3C engine background process should execute, in the background, only the rows on the Trigger Result page.
3. **Mass Change:** Select this option to indicate that the 3C engine background process should execute in the background, the mass change group ID data specified on the Mass Change page in this component.

MASS CHANGE SELECTION

1. **Mass Change Group ID:** Select the Mass Change Group ID to process from the lookup table.
2. Click **Run**.
3. Click [Process Monitor](#) to display the **Process List** page.
4. **Run Status:** Check the status of your report and process instance. Run Status will indicate whether it has been posted or run successfully.
5. Click **Refresh** until you have a successful run.
6. After run status changes to **SUCCESS**, click [Details](#).

7. The **Process Detail** page is displayed.
8. View the details and then click [Go back to 3C Engine](#) to return to the **Trigger Table** page.
9. Click **Save** to commit your changes to the database.

WALKTHROUGH – 3C ENGINE MANAGE DUPLICATE ASSIGNMENT

1. Click the **Manage Duplicate Assignment** tab.
2. The **Manage Duplicate Assignment** page is displayed.
3. Click [Explain](#) beside any item to display a message explaining the options and function of that item.

Trigger Table | Mass Change | Manage Duplicate Assignment

Run Control ID: 123 [Report Manager](#) [Process Monitor](#) [Run](#)

Duplicate Communication Check

Check Duplicate Communication [Explain](#)

Additional Conditions to Prevent Duplicate Communication

Variable Data: [Explain](#)

Communication Status: [Explain](#)

Duplicate Checklist Check

Check Duplicate Checklist [Explain](#)

Additional Conditions to Prevent Duplicate Checklist

Variable Data: [Explain](#)

Checklist Status: [Explain](#)

[Save](#) [Return to Search](#) [Add](#) [Update/Display](#)

[Trigger Table](#) | [Mass Change](#) | [Manage Duplicate Assignment](#)

DUPLICATE COMMUNICATION CHECK

1. **Check Duplicate Communication:** Select this checkbox to require the 3C engine to determine if a communication is a duplicate before assigning it. When this checkbox is selected and no additional conditions are specified, the engine will not assign the duplicate if it finds that a communication of that letter code is already assigned.

ADDITIONAL CONDITIONS TO PREVENT DUPLICATE COMMUNICATION

1. **Variable Data:** Specify variable data conditions under which duplicates should not be assigned.
 - a. **Match:** If the communications are the same and they have matching variable data, do not assign the communication.
 - b. **Do Not Match:** If the communications are the same, and their variable data are different, do not assign the communication.
 - c. **Blank:** Do not consider variable data.
2. **Communication Status:** Specify the status conditions under which duplicates should not be assigned.
 - a. **Completed:** If the communications are the same and the previously assigned communication is completed, do not assign the communication.
 - b. **Not Completed:** If the communications are the same and the previously assigned communication has been completed, do not assign the communication.
 - c. **Blank:** Do not consider communications status.

DUPLICATE CHECKLIST CHECK

Duplicate Checklist Check

Check Duplicate Checklist [Explain](#)

Additional Conditions to Prevent Duplicate Checklist

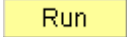
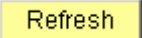
Variable Data: [Explain](#)

Checklist Status: [Explain](#)

1. **Check Duplicate Checklist:** Select this check box to require the 3C engine to determine if a checklist is a duplicate before assigning it. When this is selected and no additional conditions are specified, the engine will not assign the duplicate if it finds that a checklist of that letter code is already assigned. When this check box is not selected, the engine will assign the checklist, whether or not it is a duplicate.

ADDITIONAL CONDITIONS TO PREVENT DUPLICATE CHECKLIST

Enter values in this area to specify whether the engine should compare variable data and status to further identify duplicates and prevent assignment.

1. **Variable Data:** Specify variable data conditions under which duplicates should not be assigned.
 - a. **Match:** If the checklists are the same and they have matching variable data, do not assign the checklist.
 - b. **Do Not Match:** If the checklists are the same, and their variable data are different, do not assign the checklist.
 - c. **Blank:** Do not consider variable data.
2. **Checklist Status:**
 - a. **Completed:** If the checklists are the same and the previously assigned checklist is completed, do not assign the checklist.
 - b. **Not Completed:** If the checklists are the same and the previously assigned checklist has been completed, do not assign the checklist.
 - c. **Blank:** Do not consider checklists status.
3. Click . This will take you to the **Process Scheduler Request** page again.
4. Click [Process Monitor](#) to display the **Process List** page.
5. **Run Status:** Check the status of your report and process instance. Run Status will indicate whether it has been posted or run successfully.
6. Click  until you have a successful run.
7. After run status changes to **SUCCESS**, click [Details](#).
8. The **Process Detail** page is displayed.
9. View the details and then click [Go back to 3C Engine](#) to return to the **Trigger Table** page.
10. Click **Save** to commit your changes to the database.