Oracle® Insurance IStream

IStream Communicator User Guide

Release 2.2 FP3

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CONTENTS

Chapter 1

Overview

Note: In this release, *InSystems Correspondence* has been renamed to *IStream Communicator.*

Welcome to IStream Communicator. This User Guide contains overviews, step-by-step procedures and descriptions of the screens and fields. It is for users with the role of User, Contributor, Reviewer, or Administrator.

This chapter includes information about:

- *Document Conventions* on page 10
- *Features of IStream Communicator* on page 11
- *IStream Communicator Documentation* on page 13
- *Using the Online Help* on page 14
- *Contacting InSystems for Help* on page 18

Document Conventions

Tips, Notes, Important Notes and Warnings

Tip: A **Tip** provides a better way to use the software.

Note: A **Note** contains special information and reminders.

Important: An **Important** note contains significant information about the use and understanding of the software.

Warning: A **Warning** contains critical information that if ignored, may cause errors or result in the loss of information.

Other Document Conventions

- Product names are in italics, for example, *Microsoft Word*.
- Window names, buttons, tabs and other screen entities are in bold, for example: Click **Next**.
- Paths, URLs and code samples use the Courier font, for example: `C:\Windows`
- Some sections contain links to other **Related Topics**.

Features of IStream Communicator

IStream Communicator is a Web-based enterprise correspondence management solution that automates the process of creating, managing and distributing a high volume of consistent, accurate, personalized customer communications.

The following sections describe the main features of IStream Communicator:

Consistency

With Communicator, each department or workgroup can have its own online library of approved correspondence content, including:

- letters
- paragraphs
- text
- images
- logos
- signatures
- attachments

Custom and Fixed letters

You can select an appropriate pre-approved, fully-defined letter, or you can quickly create an entirely new custom letter, using a standard Web browser, Microsoft Word, and approved paragraphs and text.

Integration with your Business Applications

Communicator automatically retrieves selected customer data from your business applications, including policy administration, claims management or CRM systems.

Knowledge Base

While generating a letter, you can consult an online Knowledge Base of best-practices documents to help you complete the letter.

Attachments

You can set up attachments so that they are automatically added to the letter before it is released for distribution. Alternatively, you can add an attachment just before generating the letter.

Review and Approve Letters

You can review and approve letters before they are released for distribution.

Versions

With letter, component, and attachment definitions, you can assign a version label and manage version details.

Save Work in Progress

You can save partially generated letters and then return to them later.

Tracking

You can determine the status of each correspondence request and keep an audit trail of each piece of correspondence.

Confidential Letters

You can fulfill privacy legislation requirements such as HIPAA by generating correspondence without exposing confidential information.

Carbon-Copy Recipients

You can send a copy of a letter to mandatory or optional recipients.

Multi-Channel Distribution

You can print letters so they can be mailed, or you can fax or email letters directly from Communicator.

IStream Communicator Documentation

IStream Communicator includes the following documents on the installation CD. If you need a copy of any of these documents, please contact your system or product administrator.

- The *IStream Communicator User Guide* describes how each of the four roles (User, Contributor, Reviewer, and Administrator) can use Communicator. It contains overviews, step-by-step procedures and descriptions of the screens and fields.
- The *IStream Communicator Technical Guide* describes how to configure `CorrConfig.xml` using the Software Developer's Kit, and how to work with the integrated data mapper.
- The *IStream Communicator Installation Guide* includes system requirements and detailed installation and configuration information. It also includes requirements for installing Communicator with IStream Publisher or Calligo Enterprise.
- The *IStream Communicator Release Notes* contain general product information, product enhancements and new features, supported platforms and third-party software, and known limitations.
- The *IStream Communicator Online Help* contains the same information as the User's Guide, but in an online help format with a search tool, an index and a table of contents.

Using the Online Help

This section describes how to use the Online Help and includes information about:

- *The Contents of the Online Help*
- *Searching the Help* on page 14
- *Using the Help Index* on page 15
- *Using the Help Table of Contents* on page 15
- *Navigating the Help* on page 15
- *Displaying Related Help Topics* on page 16
- *Bookmarking a Help Topic* on page 16
- *Printing a Help Topic* on page 16

The Contents of the Online Help

The Online Help contains the same contents as the User Guide, but in an online Help format.

To open the Online Help, click the **Help** menu**.**

The Help is divided into two frames:

- the left frame displays the navigation tools: **Contents**, **Index** and **Search**
- the right frame contains the contents of each Help topic

There are different ways to find a Help topic:

- *Searching the Help* on page 14
- *Using the Help Index* on page 15
- *Using the Help Table of Contents* on page 15
- *Navigating the Help* on page 15
- *Displaying Related Help Topics* on page 16

Searching the Help

You can search the entire Help contents to find a specific topic.

To search the Help

1. In the left pane of the Help, click the **Search** tab.

2. Enter the word(s) you want to search for, then click **Go!** or press Enter.

3. A list of Help topics is displayed in descending order by **Rank**. The Rank indicates how many times the word(s) you searched for appears in a Help topic. It can help indicate how relevant the topic may be in your search.

Tip: Use specific words in your search, for example: *model document*. Avoid using plurals, for example, "*sections*", because this may limit your search results.

Using the Help Index

The Help **Index** contains a listing of all the Help topics in alphabetical order.

To use the Help Index

1. In the left pane of the Help, click the **Index** tab.

2. Click the letter that corresponds to the topic you are searching for. You cannot select a letter that is greyed out, because it contains no index entries.

3. A list of all index entries beginning with the letter you selected is displayed.

4. Scroll to the index entry of the topic you are searching for.

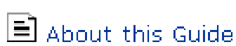
5. Click the topic to view its contents in the main body of the Help.

Using the Help Table of Contents

When you open the Help, the **Contents** are displayed. The **Contents** contain main topics and their subtopics.

Each main topic appears as a book icon:

Each subtopic appears as a page icon:

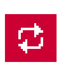


Subtopics can also appear as book icons. In other words, books can appear within other books.

You can open a book by clicking a book icon or the text next to the book icon. This will expand the book and display the topics within that book.

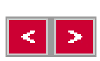
To close an open book, click the book icon. The book “collapses”, hiding the topics within the book.

Tip: When a Help topic displayed, you can click the “Show in Contents” button to open the corresponding book that contains the displayed Help topic:



Navigating the Help

To go to the next or previous Help topic in the **Contents**, use the Next and Previous buttons in right pane of the Help:



To go to the next or previous topic that you have viewed, use the **Forward** and **Back** buttons in your Web Browser.

Displaying Related Help Topics

Some Help topics contain links to other related topics.

To view related Help topics

1. At the bottom of a Help topic, click the **Related Topics** link:

Alternatively, click the **Related Topics** icon in the upper-right corner of the Help:

2. Select a **Related Topic** from the list.

3. The topic is displayed in the left pane.

4. To return to the previous topic, click the **Back** button in your Web browser.

Bookmarking a Help Topic

You can "bookmark" a Help topic by saving it as a Favorite in your Web browser. This allows you to easily return to this topic later.

To bookmark a Help topic

1. Open the Help topic.

2. Click the **Bookmark** icon in the upper-right corner of the Help.

3. A warning may appear telling you that you are adding a favorite that may not be safe, and asking if you want to continue. You can disregard this warning, and click **Yes**.

4. The **Add Favorite** dialog box appears.

5. Click OK.

6. The Help topic is now added to your Internet Explorer **Favorites**. To display this topic again at any time, select it from your **Favorites**.

Printing a Help Topic

You can print a Help topic in case you want to refer to it later.

To print a Help topic

1. Click the Print icon in the upper-right corner of the Help:

2. The Print dialog box is displayed.

3. Click **Print** to print the Help topic.

Contacting InSystems for Help

Customer Support hours are 8:00 A.M. to 8:00 P.M. (Eastern Standard Time), Monday through Friday. Outside of these hours, send us a detailed e-mail message and you will be contacted during regular business hours. Please provide detailed information, as described in the *Support Checklist*.

Contact Information

Mail:	Customer Support InSystems Corporation 19 Allstate Parkway, Suite 400 Markham, Ontario, L3R 5A4
Phone:	(905) 513-7466
Fax:	(905) 513-1684
Email:	support@insystems.com
Web:	www.insystems.com

Support Checklist

When contacting Customer Support, please provide the following information:

- Your name, company name, e-mail address, and phone number.
- Version numbers of all your InSystems products.
- Name and version of the network software.
- Windows version, including any installed Service Packs.
- .NET Framework version
- DMS version, including any installed Service Packs (if applicable).
- Microsoft Word version (if applicable).
- Database vendor and version (if applicable).
- Error messages and the circumstances of their occurrence.
- A full description of the problem:
  - What happened? What were the sequence of events that preceded the problem?
  - In which screen or window did the problem occur?
  - Was the problem the result of pressing a key?
  - Did the screen freeze? What functions of the software are affected?
  - How many people are affected?

Chapter 2

Getting Started

This chapter includes information about:

Roles and Tasks

Your Communicator role determines the tasks that you can perform.

The following sections explain how each type of role affects creating, managing and distributing personalized customer communications with Communicator:

- *Administrator Tasks* on page 20
- *Contributor Tasks* on page 21
- *User Tasks* on page 21
- *Reviewer Tasks* on page 22

For more information about each role, see the following chapters:

- *User and Reviewer Roles* on page 77
- *Reviewer Role* on page 101
- *Contributor Role* on page 29
- *The Administrator Role* on page 111

Tip: A Communicator Administrator can also give you more information about roles.

Administrator Tasks

A Communicator Administrator:

- creates a user profile for each Communicator user: the types of user profile are:
  - a **User** – someone who generates letters
  - a **Reviewer**: someone who reviews letters
  - a **Contributor**: someone who manages letter definitions
- arranges the folders that contain letter definitions
- creates workgroups based on groups in your organization
- indicates the workgroups to which each Reviewer and User belong: this determines the letter definitions each Reviewer and User can use
- generates audit trail reports
- reloads the configuration files
- redistributes failed letters

Related Topics

- *Contributor Tasks* on page 21
- *User Tasks* on page 21
- *Reviewer Tasks* on page 22
- *Other Communicator Tasks* on page 22

- *The Administrator Role* on page 111

Contributor Tasks

A Communicator Contributor creates, modifies and deletes:

- the letter definitions that are used to generate different types of letters
- the component and attachment definitions that make up each letter definition

Related Topics

- *Administrator Tasks* on page 20
- *User Tasks* on page 21
- *Reviewer Tasks* on page 22
- *Other Communicator Tasks* on page 22
- *Contributor Role* on page 29

User Tasks

A Communicator User generates a fixed or custom letter based on a letter definition that a Contributor has created.

The process of generating a letter may include the following steps:

- selecting letter definitions
- selecting components for the main body of a letter, if the letter definition is a custom letter type
- selecting add-ins (attachments)
- entering key data that defines who the specific letter is for or about; an example of key data is a policy number
- entering other data not available in the database, for example, an invoice amount
- selecting carbon-copy (CC) recipients for the letter
- entering and reviewing distribution information, for example, print-and-mail address, fax number or email address
- updating and editing the content of a letter
- releasing a completed letter for a Reviewer’s approval or for distribution
- saving an incomplete letter as a work in progress
- viewing Knowledge Base documents related to a selected letter version
- tracking a letter
- viewing and redistributing a generated letter
- recalling or deleting a pending-distribution letter

Related Topics

- *Administrator Tasks* on page 20
- *Contributor Tasks* on page 21
- *Reviewer Tasks* on page 22
- *Other Communicator Tasks* on page 22
- *User and Reviewer Roles* on page 77

Reviewer Tasks

In addition to the tasks a User can perform, a Communicator Reviewer can review letters that are generated by users who are in the same workgroup as the Reviewer, if:

- the User’s profile indicates Approval Required, or
- the letter was generated from a letter definition which specifies a manager approval is required

The Communicator Reviewer can also:

- view details of a Pending Approval letter
- update and edit the content of a Pending Approval letter
- approve a Pending Approval letter and release it for distribution
- reject a Pending Approval letter and attach a memo giving reasons for the rejection
- delete a Pending Approval letter

Related Topics

- *Administrator Tasks* on page 20
- *Contributor Tasks* on page 21
- *User Tasks* on page 21
- *Other Communicator Tasks* on page 22
- *Reviewer Role* on page 101

Other Communicator Tasks

In addition to the tasks of the roles, Communicator also requires the following tasks and requirements:

- a system or database administrator needs to install and set up Communicator
- using Calligo Author, authors need to create model document sections that provide the content for component definitions
- a database administrator needs to set up the Integrated Data Mapper
- a system administrator or developer can use the software developer kit (SDK) to extend and customize Communicator’s functionality

- a system administrator or developer needs to configure the `CorrConfig.xml` file

Related Topics

- *Administrator Tasks* on page 20
- *Contributor Tasks* on page 21
- *User Tasks* on page 21
- *Reviewer Tasks* on page 22

Logging In and Out

To use Communicator, you must log in using the **User ID** and **Password** that your Communicator Administrator provided. If you are having trouble logging in, contact your Communicator Administrator.

To log in to Communicator

1. Open Communicator in your Web browser.

   The **Communicator Secure Login** page opens.

2. Enter your **User ID** and **Password**.
3. Click **Submit**. The corresponding role-based **Home** page opens.

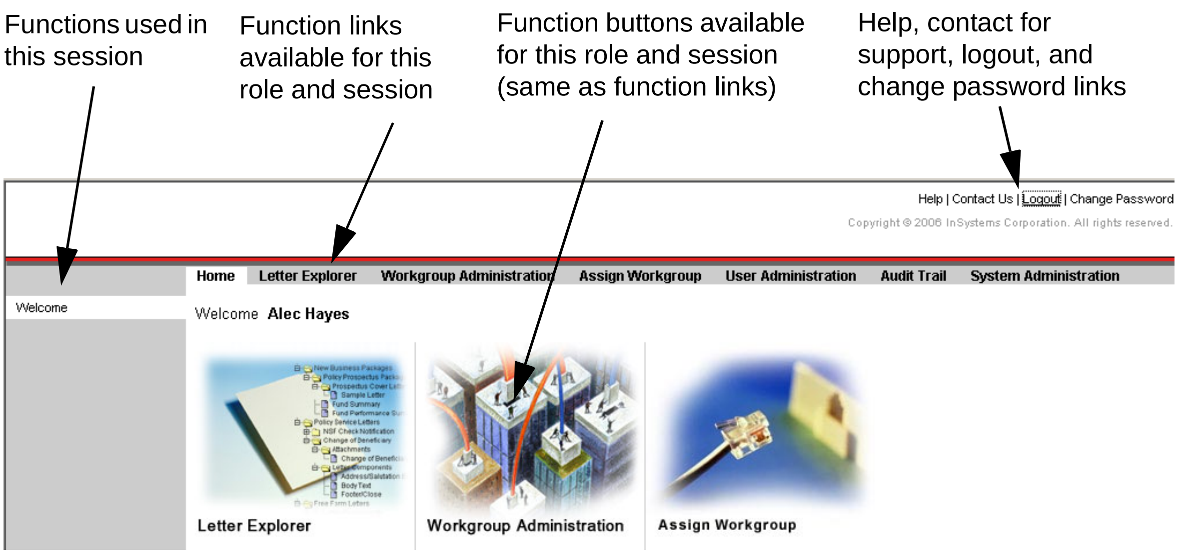
To log out of Communicator

Warning: Be sure to save your work before logging out, or your changes will be lost.

1. Click **Logout** in the upper right corner of the page. A confirmation dialog opens.
2. Click **OK**. You are now logged out.

Navigating Communicator

This section explains how to use different links to navigate in Communicator



General Links

These links are displayed in the upper right corner:

Help | Contact Us | Logout | Change Password

With the exception of **Logout**, these links do not affect any task you are performing:

- **Help** – opens the online help
- **Contact Us** – allows you to send an email to InSystems Customer Support
- **Logout** – logs you out of Communicator
- **Change Password** – allows you to change your Communicator password

Function Links

These links appear throughout Communicator, and are a quick way to open a new page elsewhere in the application:

- **Home** – returns you to the Communicator **Home** page

Your links depend on the type of role you have. For more information about roles, see *Roles and Tasks* on page 20.

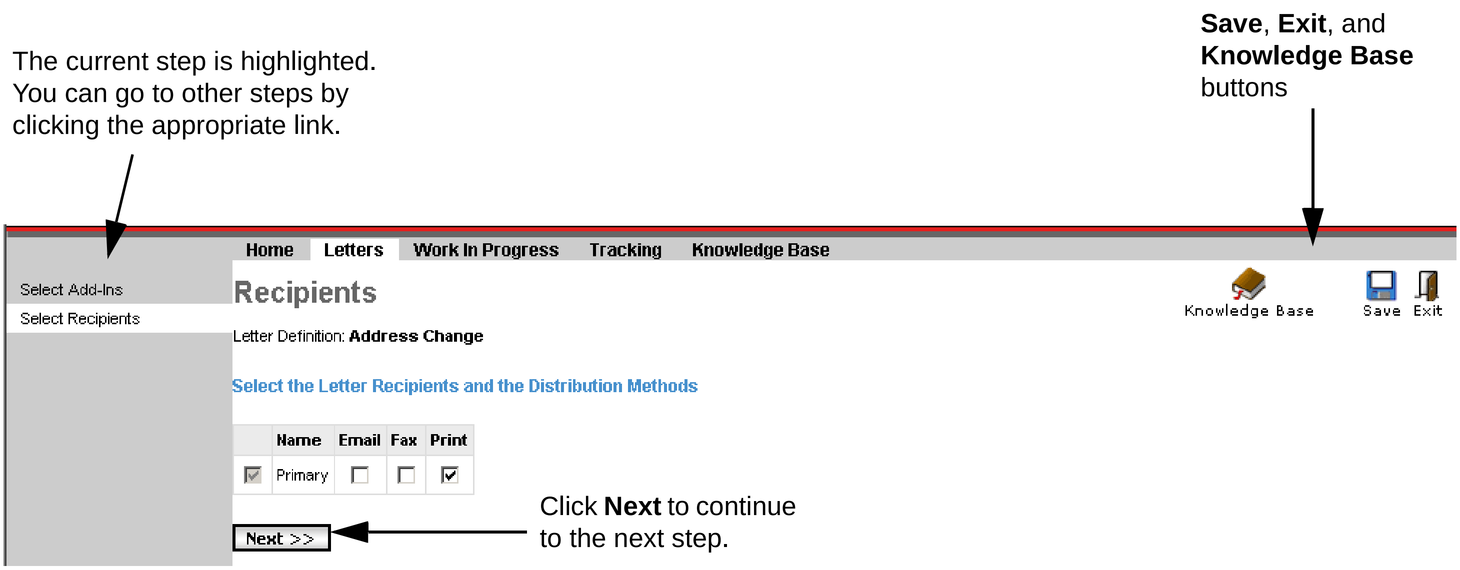
Tip: The large icons displayed in the Communicator **Home** page are the same as your function links.

If you are in the middle of a task and you click one of these links, Communicator prompts you to save your work before opening the new page.

Tasks with Several Steps

Some tasks in Communicator have several steps.

- Steps you have already performed appear as links on the left side of the page. You can click an earlier step to return to it.
- To save the steps you have performed so far, click **Save**.
- To exit the task without saving, click **Exit**.



Warning: To return to a previous page, use the Communicator links that have been used in this session: these are listed on the left side of the page, or use the function links or buttons. **Do not** use the browser's **Back** button because this can cause unexpected behavior.

Changing Your Password

After logging into Communicator, you can change your password according to the rules set by your Communicator Administrator.

If you forget your password, contact your Communicator Administrator.

To change your password

1. Click the **Change Password** link in upper-right corner of the screen.
2. The **Change Password** page opens in a new window, displaying your User ID.
   - Enter your current password in the **Enter Password** field.
   - Enter your new password in the **Enter New Password** field.
   - Enter your new password again in the **Re-enter New Password** field.
3. Click **Confirm**.

   Your password is changed.

Password Guidelines

Your Communicator administrator or system administrator can give you the guidelines to follow when creating your password, including:

- its minimum and maximum length
- whether it requires numbers or special characters
- whether it requires both upper and lower case letters

If you are having problems creating passwords, contact your system administrator to see if these requirments have changed.

Note: All passwords are case-sensitive.

For security reasons, ensure that your password:

- is different than your user ID
- does not contain personal details such as your family name, names of relatives or date of birth
- is easy for you to remember but hard for others to guess

Important: You should memorize your password. Do not write it down, and do not share it with others.

See also: *Changing Your Password* on page 27.

The Communicator Process

The following steps give an overview of the Communicator workflow process:

1. A Calligo Author user creates component templates.
2. An Administrator creates user profiles and workgroups.
3. The Administrator then assigns roles to users and users to work groups.
4. A Contributor creates and publishes version of component and attachment definitions.
5. The Contributor then creates and publishes versions of letter definitions and associates component and attachment definitions to it. The Contributor may also test letter definitions.
6. The Administrator assigns letters to workgroups.
7. Users in workgroups select letter definitions from those that are assigned by Administrators to their workgroup to create (generate) letters.
8. Users send letters directly to recipients or to reviewers, (see step 11), depending on the letter definition and user profile.
9. Reviewers review the letters and approve the delivery to the recipients or reject them and send them back to the users.
10. Users correct the letters and sent them back to the Reviewer for approval. (This step and the previous step repeat as necessary.)
11. Users in workgroups send approved letters to recipients.

Related Topics

- *Contributor Role* on page 29
- *Authoring a Calligo Subsection* on page 38
- *User and Reviewer Roles* on page 77
- *Reviewer Role* on page 101
- *The Administrator Role* on page 111

Chapter 3

Contributor Role

To generate a letter in Communicator, a User needs to select a letter definition that a Contributor has created. A letter definition consists of components, and can also include add-ins.

This chapter includes information about:

Note: You cannot work with letter, component and attachment definitions unless you have a Contributor role. See your Communicator Administrator for more information about roles.

To understand the process of defining letters, components, and attachments, see *The Communicator Process* on page 28.

The Letter Creation Process

The following sections describe how letter, component and attachment definitions and component templates work together.

- *The Communicator Process* on page 30
- *Requirements for Letter Generation* on page 31
- *Definition Types* on page 31
- *Reusing Component and Attachment Definitions* on page 32

The Communicator Process

The following steps give an overview of the complete Communicator workflow process:

1. A Calligo Author user creates component templates.

2. An Administrator creates user profiles and workgroups.

3. An Administrator assigns roles to users and users to workgroups.

4. A Contributor creates versions of component definitions using component templates created in Calligo Author and attachment definitions using files in PDF, Word DOC, or TIF format.

Important: Versions of component and attachment definitions must be published in order to be available during letter creation. See the information beginning with *Adding a Component Definition Version* on page 44.

5. A Contributor creates and publishes versions of letter definitions and associates component and attachment definitions to it. A Contributor may also test letter definitions.

6. An Administrator assigns letters to workgroups.

7. From the letter definitions assigned to workgroups by Administrators, Users in those workgroups select letter definitions with which to create (generate) letters.

8. Users send letters directly to recipients or to Reviewers for approval (see step 11) according to the letter definition and user profile.

9. Reviewers review letters and either approve delivery to recipients or reject them and return them to users for correction.

10. Users correct letters and return to the Reviewer for approval.

11. Users in workgroups send approved letters to recipients.

12. Administrators generate audit trail reports and manage users and workgroups.

13. Users and Reviewers intermittently review tracking for letters that require reassignment, recall, or redistribution.

Requirements for Letter Generation

To ensure letters are correctly generated from a letter definition, the Contributor must:

- ensure that the generation date falls between the effective and termination dates for component templates of sections that are expected to be in the generated letter
- work with the system administrator to ensure that InfoSources have been properly set up on the Publisher environment
- ensure that component templates are not moved, renamed or deleted after the component definitions or letter definitions have been defined

If any of these conditions are not met, when a User generates a letter from a letter definition that has *any* of the following properties:

- contains a section (a **.**CDS file) or a component definition in which the generation date is outside of the effective and termination date range
- references an InfoSource that has not been correctly created
- contains a component template that is not in the expected location or has been renamed

then the generated letter will be missing content.

Warning: The user will have no indication that any content is missing.

Definition Types

A letter definition consists of one or more component definitions and can also include one or more attachment definitions.

Component Definitions

A component definition refers to a Calligo model document section, known as a component template. The Calligo model document section defines the exact content that a component definition will add to the letter.

Example: A component definition might add a company logo, policyholder address, or specific text to a letter.

Attachment Definitions

An attachment definition points to an existing file in the Calligo DMS or a network directory. The file may be a Microsoft Word document, an Adobe PDF file, or a TIFF image file.

Note: Attachment definitions are also called add-ins.

Example: An add-in might add an electronic copy of a brochure or form to a letter.

Reusing Component and Attachment Definitions

Component and attachment definitions are re-usable: you can use a single component and attachment definition in several letter definitions.

Reusing component and attachment definitions streamlines workflow and increases the consistency, accuracy and professionalism of your organization’s correspondence.

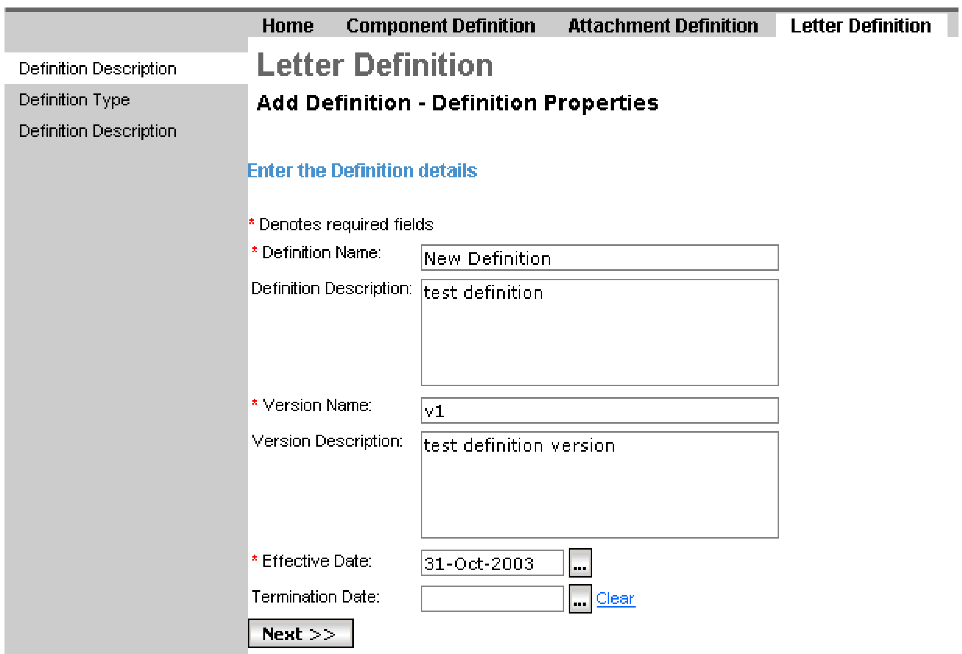
For example:

- A “company logo” and “customer address” component definition and a “new product information brochure” attachment definition might be used in several letter definitions.
- An “NSF letter text” component definition and a “payment options brochure” attachment definition might be used only in an “insufficient funds” letter definition.

Definition Versions

All definitions use versioning. When you first create a definition, (using the **Letter Definition** page) you are actually creating the first version of that definition. You need to enter a name for both the definition and the version, and optionally a description for each. For subsequent definition versions, you enter a new version name, but the same definition name will be retained. The effective and termination dates for each version control the timing of the changes.

The Letter Definition Page



In the **Version Name** field, enter a name for the version of the definition. Version names must be unique *within a definition*. In the **Version Description** text entry box, you can enter a description for this version.

Note: In the **Manage Versions** page for each type of definition, the definition can be in one of the following statuses:

- **Published** – the definition is complete and available for use in letters
- **Unpublished** – the definition is complete but not available for use in letters
- **Incomplete** – the definition is missing content that is necessary before it can be published

Important: Ensure that you do not select effective and termination dates that conflict with other versions, or select other dates that cause conflicts, such as an effective date that is after the termination date.

Dates, Definitions, and Versions

The following sections include more information about versions.

Referenced and Unreferenced Versions

Component and attachment definition versions are included in letter definitions, and letter definitions are included in letters. Another way of saying definition versions are included is to say they are *referenced* by version. The system stores the version according to the version's name and time stamp. If a definition is *unreferenced*, it means it was not included in a letter or was removed from it.

Deleting Letter Definitions

You can delete versions of a letter definition only if they are unreferenced in letters and are not the current or only version.

You cannot delete letter definitions once they are created. You should first check that you cannot use any existing letter definitions before you create new ones.

You cannot delete referenced definition versions.

Referencing of Component and Attachment Definition Versions

When Contributors create letter definitions, they refer to attachment and component definitions, not versions of the definitions. The version used in the letters is determined by the effective and termination dates of the version and the system date.

Definitions and Letters

Component and attachment definitions that are not published or in effect are not included in letters.

Letter definition versions that are not published or do not have a version in effect cannot be used to generate letters.

Work in Progress uses the version in effect at the time the letter was created, not the current version in effect when work resumed. Any recent changes may therefore not be reflected in Work in Progress.

Knowledge Base

Knowledge base articles are associated with specific letter definition versions. When you view knowledge base articles for a specific letter definition, you can view all of the knowledge base articles that are associated with the letter definition version in effect at that time.

Letter Definition Elements and Usage Rules

Letters can contain components which may be included or omitted for certain recipients. The two types of recipients are *primary recipients* and *CC recipients.*

When creating letter definitions, you use **Usage Rules** to determine how the component will be used in the generated letter. You set up the **Usage Rules** in the **Components** page: for more information, see the *Components Page* on page 62.

Primary and CC Recipients

You create letters that will be sent to the main recipient, called the *primary recipient*, and can optionally send copies of these letters to additional recipients, called *CC recipients*.

You can set up a letter so that the CC recipients will receive the same letter as the primary recipient, or with additional text, or with some text excluded.

- select the **All** usage rule to include the component in letters to *both* the primary and CC recipients
- select the **Original only** usage rule to include the component in letters to the primary recipients only, for example, the primary recipient's name and address
- select the **CC Only** usage rule to include the component in letters to the selected carbon copy (cc) recipients only, for example, the cc recipient's name and address

CC Block

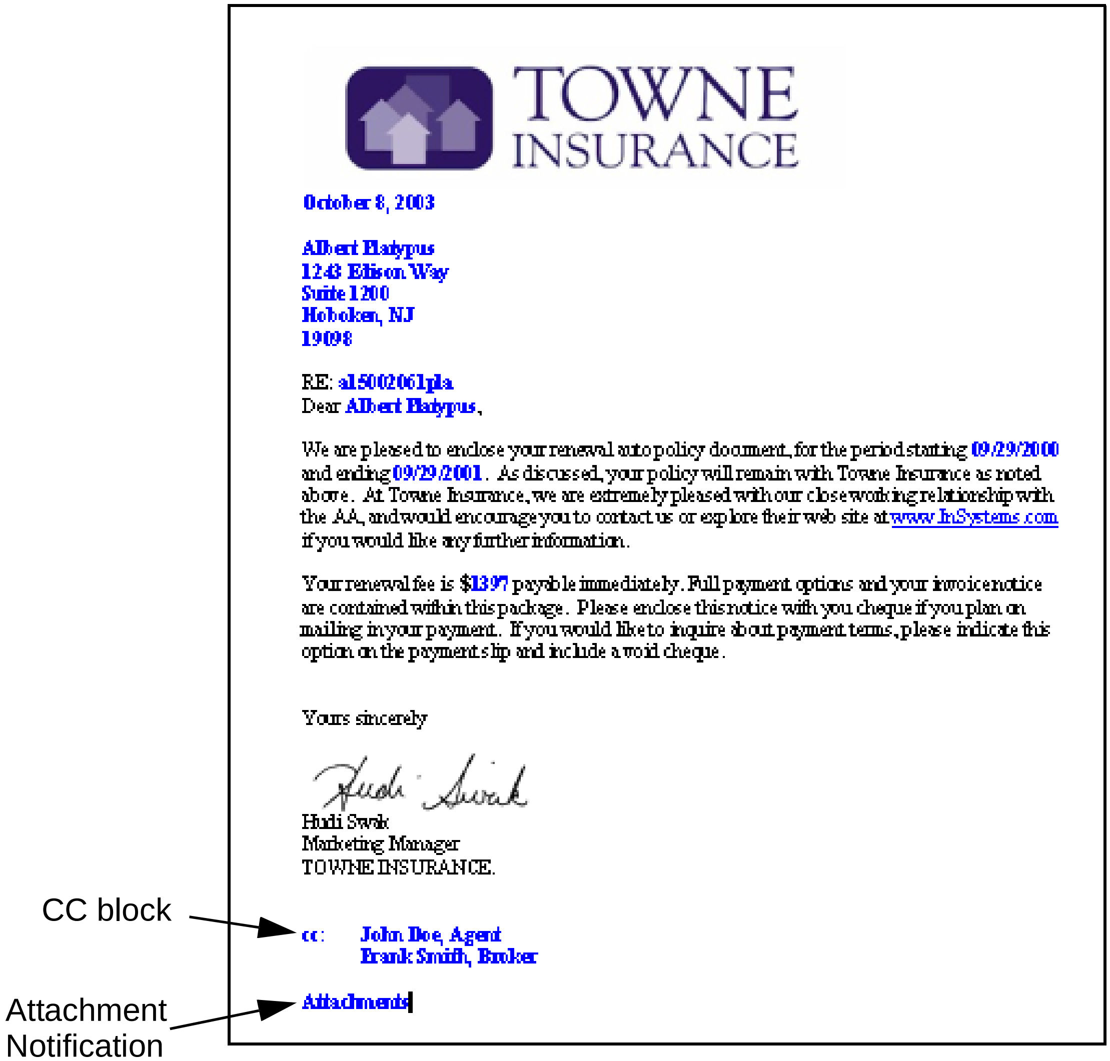
A **CC Block** is a section of text in a letter indicating a list of all the CC recipients to which the letter is being sent. It is included in letters to both primary and CC recipients if there are CC recipients selected for the generated letter.

Select the **CC Block Usage Rule** to include a CC Block in your letter.

Attachment Notification

An attachment notification is a section of text in a letter indicating that there are attachments included with the generated letter.

Select the **Attachment Notification** usage rule to use the component as the contents for the attachment notification in the letter.



TOWNE INSURANCE

October 8, 2003

Albert Platypus
1243 Edison Way
Suite 1200
Hoboken, NJ
19098

RE: al5002061pla
Dear Albert Platypus,

We are pleased to enclose your renewal auto policy document, for the period starting 09/29/2000 and ending 09/29/2001. As discussed, your policy will remain with Towne Insurance as noted above. At Towne Insurance, we are extremely pleased with our close working relationship with the AA, and would encourage you to contact us or explore their web site at www.InSystems.com if you would like any further information.

Your renewal fee is $1397 payable immediately. Full payment options and your invoice notice are contained within this package. Please enclose this notice with you cheque if you plan on mailing in your payment. If you would like to inquire about payment terms, please indicate this option on the payment slip and include a void cheque.

Yours sincerely

Hudi Swak
Marketing Manager
TOWNE INSURANCE.

cc: John Doe, Agent
Frank Smith, Broker

Attachments

Related Topics

- *Coding Examples* on page 38

Selecting a File for a Definition Version

When creating or modifying any kind of definition, you can click **Browse** to select a file to use in the definition.

To select a file to use in the definition version

1. While modifying or creating a definition, click **Browse** in the **Location** area.
2. A new window opens, showing a drop-down list of repositories that has been configured by the Administrator.
3. Select a repository from the drop-down list.
4. The folders that the repository contains appear in the list of folders. These folders contain files you can use in your definition.
5. Browse the folders and select the file to use in your definition version.
6. Click **Select**.
7. The window closes, and the **Repository** and **Location** fields are populated with the selected repository and filename.
8. Continue creating or modifying your definition version.

Related Topics

- *Working with Component Definitions* on page 41
- *Working with Attachment Definitions* on page 50

Authoring a Calligo Subsection

You need to define variables differently when authoring a Calligo subsection which will be referenced by a Communicator component definition.

For each variable, type `DEFINE @VariableName`, where `VariableName` is a variable name that appears in the `<var-name>` tag in the Data Library definition.

See *The Communicator Process* on page 28 for more information on the definition creation process.

Note: See the sample below or the file `DataDict.xml` on the Communicator installation CD for another sample.

Important: Be sure to follow these rules when authoring a subsection for Communicator:

- Ensure that the `@` character appears before the variable name.
- Ensure that each variable corresponds to a `<data-element>` in a `<data-package>` in the Data Library Definition.
- Do not define values for variables, as you would for normal Calligo variables. If you define values, Communicator ignores the values and gives a warning message.

After defining your variables, you can use the variables as you would in any valid Calligo expression (for example, `TEXT` and `ENDTEXT`).

Coding Examples

This following sections contains coding examples:

- *Communicator Subsection* on page 38
- *CC Block Component Code* on page 39
- *Attachment Notification Code* on page 40

Communicator Subsection

This following code is an example of a subsection for use in Communicator:

```
DEFINE @caddress
DEFINE @ccity
DEFINE @cstate
DEFINE @cpostalCode
DEFINE @cname
DEFINE @account
TEXT
<cname>
<caddress>,
<ccity>,<cstate>
<cpostalCode>
Re: Account Status
Dear <cname>,
```

```
Your account number is <account>.
ENDTEXT
```

CC Block Component Code

The following code is an example of a CC block component. This component is only included if there are CC recipients in the letter. Communicator defines the `letter_recipients` array, which is populated with the information about recipients.

The first row in the array is for the primary recipient. The first column in the array is the recipient’s title, and second column is the recipient’s name.

```
** Prints out the contents of the recipient array
**
IF LEN(letter_recipients) > 0
   TEXT

   ORIGINAL:<letter_recipients[1,1]>,
<letter_recipients[1,2]>
   ENDTEXT
ENDIF
DEFINE nArrayCnt 2
DO WHILE nArrayCnt <= LEN(letter_recipients)
   TEXT
   CC:   <letter_recipients[nArrayCnt,1]>,
<letter_recipients[nArrayCnt,2]>
   ENDTEXT
   DEFINE nArrayCnt (nArrayCnt +1)
ENDDO
```

Attachment Notification Code

The following code is an example of an attachment notification component. This component is only included if there are attachments in the letter. Communicator defines the `letter_attachments`, which is populated with the attachment names.

```
** Prints out the contents of the attachments array

DEFINE nArrayCnt 1
DO WHILE nArrayCnt <=LEN(letter_attachment)
   TEXT

   ATTACHMENT:<letter_attachment[nArrayCnt,1]>
   ENDTEXT
DEFINE nArrayCnt (nArrayCnt+1)
ENDDO
```

Note: See the Calligo Author documentation for more information on authoring Calligo model documents.

Related Topics

- *The Communicator Process* on page 28
- *Definition Versions* on page 33
- *Working with Component Definitions* on page 41
- *Working with Attachment Definitions* on page 50
- *Working with Letter Definitions* on page 58

Working with Component Definitions

You cannot work with letter, component and attachment definitions unless you are assigned a Contributor role by your Administrator. See your Communicator Administrator for more information about roles, or see *Getting Started* on page 19.

A letter has different parts, such as a header, footer, address block, salutation, and body paragraph. In Communicator, a letter definition consists of several component definitions, which provide the content for different parts of a letter.

Each component definition version points to a Calligo model document section. The Calligo model document section determines the information that the component definition adds to the letter.

You can save your work while working with a definition. If there is already a definition with the same name, enter a new name and click **Save**, or click **Cancel** to go back.

A single component can be used in any number of letter definitions.

Example: You may want to include the same contact information in every letter your organization distributes. You can create one component definition called "Contact" and use the component definition in every letter definition.

Important: Text entry fields, such as **Definition Name**, **Version Name, Repository** should contain less than 50 alphanumeric characters with no spaces.

Note: For more information on choosing a file to work with, see *Selecting a File for a Definition Version* on page 37.

Related Topics

- *The Communicator Process* on page 28
- *Authoring a Calligo Subsection* on page 38
- *Working with Attachment Definitions* on page 50
- *Working with Letter Definitions* on page 58

Managing Dates in Component Definition Versions

Note: Only dates that occur in the future can be edited, not current and past dates.

Versions require effective and termination dates to be entered to clarify when a definition becomes effective (active or available) and when it should no longer be active or available.

Managing dates for a component definition is identical to that in a letter definition. Please see *Managing Dates* on page 74 for details on how to set effective and termination dates.

Note: You can only delete versions that come into effect in the future.

Creating a Component Definition

In the **Component Definition** page, you can:

- create, edit and delete a component definition
- manage component definition versions

Important: Text entry fields, such as **Definition Name**, **Version Name, Repository** should contain less than 50 alphanumeric characters with no spaces.

To create a component definition

1. In the Communicator **Home** page, click **Component Definition**.

   The **Component Definition** page opens.

2. Select **Create Component Definition**, then click **Select**.

   The **Definition Description** page opens.

   A component definition will only be included in a generated letter if:

   - the component definition is published, and
   - the date that the letter is generated is between the effective and termination dates of the component definition version

3. Enter a name for the component definition in the **Definition Name** field.
4. Optionally, enter a brief description of the component definition in the **Definition Description** field.
5. Enter a name for the definition version in the **Version Name** field.
6. Optionally, enter a brief description of the definition version in the **Version Description** field
7. Click the selector button [...] beside the **Effective Date** field to select an effective date for the component definition version.

Note: The later version's **Effective Date** must follow the earlier version's **Termination Date**.

8. To specify a termination date for the component definition version, click the selector button [...] beside the **Termination Date** field.
9. Click **Next**.

   The **Component Template** page opens.

10. Click **Browse** in the **Component Template** area to select the Calligo model document section to use for your component definition version. For more information on browsing for a file, see *Selecting a File for a Definition Version* on page 37.
11. Click **Next**.

The **Component Variables** page opens. These variables are defined in the component template. If there are no variables, you will see a message stating that there are no variables defined in the selected component template. If there are variables, they will be listed.

If any of the variable data fields appear to be incorrect, the Calligo model document section can be modified with Calligo Author: see the Author more documentation.

12. Click **Finish** to create the component definition. You are returned to the **Manage Versions** page.

Note: If the name you chose for the component definition already exists, you will be prompted to enter a new name in the **Duplicate Definition Name** page. Enter a unique name and click **Save**, or click **Cancel** to cancel the operation.

Related Topics

- *The Communicator Process* on page 28
- *Adding a Component Definition Version* on page 44
- *Deleting a Component Definition* on page 48

Editing a Component Definition

You can edit the description for a component definition. All other modifications of component definitions are done at the version level.

Important: Text entry fields, such as **Definition Name**, **Version Name, Repository** should contain less than 50 alphanumeric characters with no spaces.

To edit the component definition description

1. In the Contributor **Home** page, click **Component Definition**.

   The component definition page opens.

2. Select **Edit Component Definition**.

   A drop-down selection list displays on the right side of the page.

3. Select a component definition for which to edit the description. (For information on how to search for a definition, see *Searching for Component and Attachment Definitions* on page 56.)

4. Click **Select**.

   The **Edit Definition - Definition Properties** page opens.

5. Enter or modify the description.

6. Click **Confirm**.

   Your changes are made and you are returned to the **Component Definition** page.

Adding a Component Definition Version

To create a new Component Definition version

1. In the component definition **Home** page, click **Manage Component Definition Versions.**

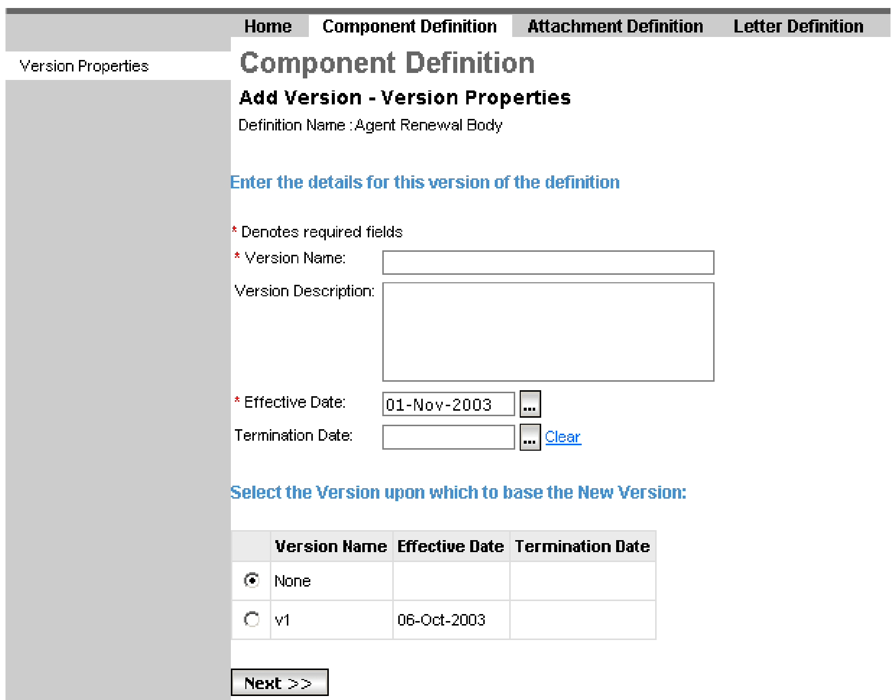
2. Choose a component definition from the drop-down list that displays, then click **Select**. (For information on how to search for a definition, see *Searching for Component and Attachment Definitions* on page 56.)

   A component definition will only be included in a generated letter if:

   - the component definition is published and
   - the date that the letter is generated is between the effective and termination dates of the component definition version.

3. In the **Manage Versions** page, click **Add Version** to create a new version.

4. The **Add Version - Version Properties** page opens.



5. Enter a unique **Version Name, Version Description**, and select **Effective** and (optionally) **Termination Dates**. Indicate the version upon which to base this version, or select **None** to create an entirely new version.

Note: If the name you chose for the component definition already exists, you will be prompted to enter a new name in the **Duplicate Definition Name** page. Enter a unique name and click **Save**, or click **Cancel** to cancel the operation.

6. Click **Next**.

   The **Component Template** page opens.

7. Click **Browse** in the **Component Template** area to select the Calligo model document section to use for your component definition version. If the version is based on an existing version, these fields will be pre-populated. You may leave these fields as they are or browse to select another file for this version.

For more information on browsing for a file, see *Selecting a File for a Definition Version* on page 37.

8. Click **Next**.

The **Component Variables** page opens. These variables are defined in the component template. If there are no variables, you will see a message stating that there are no variables defined in the selected component template. If there are variables, they will be listed.

Note: If any of the variable data fields appear to be incorrect, the Calligo model document section can be modified with Calligo Author. See the Author documentation for instructions.

9. Click **Finish** to create the component definition.

You are returned to the **Manage Versions** page.

Note: If the name you chose for the component definition version already exists, you will be prompted to enter a new name in the **Duplicate Version Name** page. Enter a unique name and click **Save** to create a new version, or click **Cancel** to cancel the operation.

Related Topics

- *The Communicator Process* on page 28
- *Creating a Component Definition* on page 42
- *Deleting a Component Definition* on page 48

Deleting a Component Definition Version

Note: You can only delete versions that come into effect in the future.

To delete a component definition version

1. In the Contributor **Home** page, click **Component Definition**.

The **Component Definition** page opens.

2. Select **Manage Component Definition Versions**.

A drop-down selection list displays on the right side of the page.

3. Select a component definition to work with.

4. Click **Select**. (To search for a definition, see *Selecting a File for a Definition Version* on page 37.)

Only versions that have an **Effective Date** set in the future have a **Delete** link beside them.

5. In the **Manage Versions** page, click the **Delete** link beside the version to be deleted.

6. In the **Delete Version** page, click **Confirm** to delete the version, or click **Cancel** to exit.

   You are returned to the **Manage Versions** page.

Editing a Component Definition Version

To edit a version of a component definition

1. In the Contributor **Home** page, click **Component Definition**.

The **Component Definition** page opens.

2. Select **Manage Component Definition Versions**.

A drop-down selection list displays on the right side of the page.

3. Select a component definition to edit. (For information on searching for a definition, see *Searching for Component and Attachment Definitions* on page 56.)

4. Click **Select**.

The **Manage Versions** page opens.

5. Click the **Edit** link beside the version that is available to edit.

The **Edit Version - Version Properties** page opens.

6. Optionally enter a description in the **Version Description** text entry box, then click **Next**.

The **Edit Version - Component Template** page opens.

7. Accept the current selection or browse for a new template to use.

8. Click **Next**.

The **Edit Version - Component Variables** page opens.

9. If there are no variables, you will see a message stating there are no variables defined in the selected component template. If there are variables, they will be listed, as shown below.

10. Click **Finish**.

You are returned to the **Manage Versions** page.

Publishing a Component Definition Version

You can publish a version to make it available to be used in a letter.

To publish a Component Definition version

1. In the Contributor **Home** page, click **Component Definition**.

The **Component Definition** page opens.

2. Select **Manage Component Definition Versions**.

A drop-down selection list displays on the right side of the page.

3. Select a component definition to edit. (See *Searching for Component and Attachment Definitions* on page 56 for more information on selecting a definition to work with.)

4. Click **Select**.

The **Manage Versions** page opens.

Only versions that are complete will have a **Publish** link beside them. Otherwise, they will have an **Incomplete** label.

5. Click the **Publish** link beside the version to publish.
6. A confirmation page opens to ask if you are sure you want to publish this version. Click **Confirm**.

   You are returned to the **Manage Versions** page.

Unpublishing a Component Definition Version

You can unpublish a version to make it unavailable to be used in a letter.

To unpublish a component definition version

1. From the Contributor **Home** page, click **Component Definition**.

   The **Component Definition** page opens.
2. Select **Manage Component Definition Versions**.

   A drop-down selection list displays on the right side of the page.
3. Select a component definition to edit. (See *Searching for Component and Attachment Definitions* on page 56 for more information on selecting a definition to work with.)
4. Click **Select**. The **Manage Versions** page opens.
5. Click the **Unpublish** link beside the version to unpublish.
6. A confirmation page opens to ask if you are sure you want to unpublish this version. Click **Confirm**.

   You are returned to the **Manage Versions** page.

Deleting a Component Definition

To delete a component definition

1. In the Communicator **Home** page, click **Component Definition**.

   The **Component Definition** page opens.
2. Select **Delete Component Definition**.

   A drop-down list displays, showing all the component definitions saved in Communicator.
3. To search for a specific component definition, click **Search**. (For more information about searching, see *Searching for Component and Attachment Definitions* on page 56.)
4. Select the component definition to be deleted, then click **Select**.

   The **Delete Definition** page opens, showing the component definition you selected.

5. Click **Confirm** to delete the component definition, or click **Cancel** to exit.

   Communicator deletes the component definition and the **Component Definition** page opens.

Note: If the component definition is in use by any letter definition version, you will not be able to delete the component definition.

Related Topics

- *The Communicator Process* on page 28
- *Creating a Component Definition* on page 42
- *Adding a Component Definition Version* on page 44

Working with Attachment Definitions

To work with letter, component and attachment definitions, you must be assigned a Contributor role by your Administrator. See your Communicator Administrator for more information about roles, or see *Getting Started* on page 19.

A letter can have attachments, for example, an electronic copy of a brochure. In Communicator, a letter definition can include several attachment definitions. Each attachment definition refers to a file that is attached to the letter when it is distributed.

An attachment definition can be used in any number of letter definitions.

Example: You may want to include the same brochure information in every letter your organization distributes. You could create one attachment definition called "Brochure" to be used in every letter definition.

Important: Text entry fields, such as **Definition Name**, **Version Name, Repository** should contain less than 50 alphanumeric characters with no spaces.

Tip: While working with a definition, you can save your work. If there is already a definition with the same name, enter a new name and click **Save**, or click **Cancel** to go back.

Related Topics

- *The Communicator Process* on page 28
- *Working with Component Definitions* on page 41
- *Working with Letter Definitions* on page 58

Managing Dates for Attachment Definitions

Note: You can edit only dates that occur in the future, not current and past dates.

Versions require effective and termination dates to be entered to clarify when a definition becomes effective (active or available), and when it should no longer be active or available.

Managing dates for an attachment definition is identical to that in a letter definition. Please see *Managing Dates* on page 74 for details on how to set effective and termination dates.

Creating an Attachment Definition

To create an attachment definition

1. In the Communicator **Home** page, click **Attachment Definition**.

   The **Attachment Definition** page opens.

2. Select **Create Attachment Definition**, then click **Select**.

   The **Definition Description** page opens.

Note: An attachment definition will only be included in a generated letter if:

- the attachment definition is published, and
- the date that the letter is generated is between the effective and termination dates of the Attachment definition version.

3. Enter a name for the attachment definition in the **Definition Name** field.
4. Optionally enter a brief description of the attachment definition in the **Definition Description** field.
5. Enter a name for the definition version in the **Version Name** field.
6. Optionally, enter a brief description of the definition version in the **Version Description** field.
7. Click the selector button [...] beside the **Effective Date** field to select an effective date for the attachment definition version.

Note: The later version’s **Effective Date** must follow the earlier versions **Termination Date**.

8. To specify a **Termination Date** for the attachment definition version, click the selector button [...] beside the **Termination Date** field. A **Termination Date** is optional for the most recent version.
9. Click **Next**.

   The **Attachment Template** page opens. Click **Browse** to select the file to use in your attachment definition. For more information on browsing for a file, see *Selecting a File for a Definition Version* on page 37.

10. Click **Finish**. You are returned to the **Attachment Definition** page.

Note: If the location of the file to be included as an attachment is not known until the letter is generated, leave the **Location** field blank. The user will provide the location at the time of letter creation.

Related Topics

- *The Communicator Process* on page 28
- *Editing an Attachment Definition* on page 52
- *Deleting an Attachment Definition* on page 52

Editing an Attachment Definition

You can only modify the description of an attachment definition.

To modify an attachment definition description

1. In the Communicator **Home** page, click **Attachment Definition**.

   The **Attachment Definition** page opens.

2. Select **Edit Attachment Definition**.

   A drop-down list displays, showing all the attachment definitions saved in Communicator.

3. To search for a specific attachment definition, click **Search**. (For more information about searching, see *Searching for Component and Attachment Definitions* on page 56.)

4. Select the attachment definition for which to edit the description and click **Select**.

   The **Definition Description** page opens, showing the attachment definition you selected.

5. You can only modify the description of the attachment definition in the **Definition Description** field.

6. Click **Confirm**.

   Communicator saves the new information for the attachment definition, and the attachment definition page opens.

Related Topics

- *The Communicator Process* on page 28
- *Creating an Attachment Definition* on page 51
- *Deleting an Attachment Definition* on page 52

Deleting an Attachment Definition

To delete an attachment definition

1. In the Communicator **Home** page, click **Attachment Definition**.

   The **Attachment Definition** page opens.

2. Select **Delete Attachment Definition**.

   A drop-down list displays, showing all the attachment definitions saved in Communicator.

3. To search for a specific attachment definition, click **Search**. (For more information about searching, see *Searching for Component and Attachment Definitions* on page 56.)

4. Select the attachment definition to delete, then click **Select**.

The **Delete Definition** page opens, showing the attachment definition you selected.

5. Click **Confirm** to delete the attachment definition, or click **Cancel** to exit.

   Communicator deletes the attachment definition and the **Attachment Definition** page opens.

Note: You cannot delete attachment definitions that are in use by any letter definition version.

Related Topics

- *The Communicator Process* on page 28
- *Creating an Attachment Definition* on page 51
- *Editing an Attachment Definition* on page 52

Adding an Attachment Definition Version

An attachment definition will only be included in a generated letter if:

- the attachment definition is published, and
- the date that the letter is generated is between the effective and termination dates of the Attachment definition version

To add an attachment definition version

1. In the Communicator **Home** page, click **Attachment Definition.**
2. In the **Attachment Definition** page, click **Manage Attachment Definition Versions.**
3. Choose an attachment definition from the drop-down list that displays, and click **Select**. (For information on searching for an attachment definition, see *Searching for Component and Attachment Definitions* on page 56.)
4. In the **Manage Versions** page, click **Add Version** to create a new version.
5. In the **Version Properties** page, enter a unique **Version Name,** optionally enter a **Version Description**, and select **Effective** and (optionally) **Termination Dates**. Indicate the version upon which to base this version, or select **None** to create an entirely new version.
6. Click **Next**.

   The **Attachment Template** page opens.
7. Click the **Browse** link to locate the template. (For more information on browsing for a file, see *Selecting a File for a Definition Version* on page 37.)
8. Click **Finish**. The new version is added to the **Manage Versions** page.

Deleting an Attachment Definition Version

To delete an attachment definition version

Note: You can only delete versions that come into effect in the future.

1. In the Contributor **Home** page, click **Attachment Definition**.

   The **Attachment Definition** page opens.

2. Select **Manage Attachment Definition Versions**.

   A drop-down selection list displays on the right side of the page.

3. Select an attachment definition to work with, then click **Select**.

   (For information on searching for an attachment definition, see *Searching for Component and Attachment Definitions* on page 56.)

Note: Only versions that have an **Effective Date** set in the future have a **Delete** link beside them.

4. In the **Manage Versions** page, click the **Delete** link beside the version to delete.

5. In the **Delete Version** page, click **Confirm** to delete the version, or click **Cancel** to exit.

   You are returned to the **Manage Versions** page.

Editing an Attachment Definition Version

To edit an attachment definition version

1. From the Contributor **Home** page, click **Attachment Definition**.

   The **Attachment Definition** page opens.

2. Select **Manage Attachment Definition Versions**.

   A drop-down selection list displays on the right side of the page.

3. Select an attachment definition to work with, then click **Select**.

   For information on searching for an attachment definition, see *Searching for Component and Attachment Definitions* on page 56.

4. In the **Manage Version**s page, click the **Edit** link beside the version to edit.

5. In the **Edit Version - Version Properties** page, optionally enter or edit the **Version Description**, then click **Next**.

6. In the **Attachment Template** page, click the **Browse** link to locate the template that your attachment will use, or keep the one that is already indicated. Click **Finish**.

   You are returned to the **Manage Versions** page.

Publishing Attachment Definition Versions

To publish an attachment definition version

1. From the Contributor **Home** page, click **Attachment Definition**.

The **Attachment Definition** page opens.

2. Select **Manage Attachment Definition Versions**.

A drop-down selection list displays on the right side of the page.

3. Select an attachment definition to edit. (For information on searching for an attachment definition, see *Searching for Component and Attachment Definitions* on page 56.)

4. Click **Select**.

The **Manage Versions** page opens.

Only versions that are complete will have a **Publish** link beside them. Otherwise, they will have an **Incomplete** label.

From this page, you can **Add Version, Manage Dates, Edit, Delete,** or **Publish** and **Unpublish** versions.

5. Click the **Publish** link beside the version to publish.

6. A confirmation page opens to ask if you are sure that you want to publish this version. Click **Confirm**.

You are returned to the **Manage Versions** page.

Unpublishing Attachment Definition Versions

To unpublish an attachment definition version

1. From the Contributor **Home** page, click **Attachment Definition**.

The **Attachment Definition** page opens.

2. Select **Manage Attachment Definition Versions**.

A drop-down selection list displays on the right side of the page.

3. Select an attachment definition to edit. (For information on searching for an attachment definition, see *Searching for Component and Attachment Definitions* on page 56.)

4. Click **Select**. The **Manage Versions** page opens.

Only versions that are published will have an **Unpublish** link beside them. Otherwise, they are either incomplete or already unpublished.

From this page, you can **Add Version, Manage Dates, Edit, Delete,** or **Publish** and **Unpublish** versions.

5. Click the **Unpublish** link beside the version to unpublish.

6. A confirmation page opens to ask if you are sure that you want to unpublish this version. Click **Confirm**.

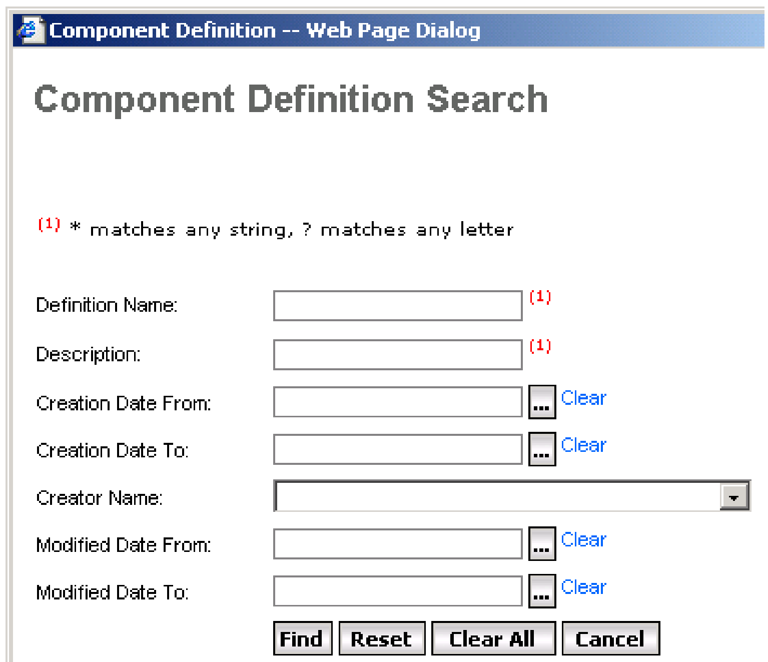
You are returned to the **Manage Versions** page.

Searching for Component and Attachment Definitions

In the **Component Definition** page and the **Attachment Definition** page, you can use the **Search** function to **Modify**, **Delete**, or **Manage Versions** for an existing definition.

To search definitions

1. From the Contributor **Home** page, select either **Component Definition** or **Attachment Definition**.
2. In the **Component Definition** page or the **Attachment Definition** page, click **Search**.
3. The **Search** page opens in a new window – **Component Definition Search** or **Attachment Definition Search**.



4. Enter any of the following criteria for your search:
   - the **Definition Name**
   - the definition's **Description**
   - **Creation Date** or **Modification Date**: click the selector buttons [...] beside the **Date From** and **Date To** fields to select date ranges for the creation or modification dates
   - the **Creator Name**: the name of the contributor who created the definition
5. Click **Find**.

Any definitions that meet your criteria display at the bottom of the Search page.

6. Click the definition to modify or delete.

The **Search** page closes, and the definition that you selected is in the drop-down list in the **Component Definition** or **Attachment Definition** page.

To reset search fields to their previous values

- Click **Reset**.

To clear all search fields

- Click **Clear All**.

Related Topics

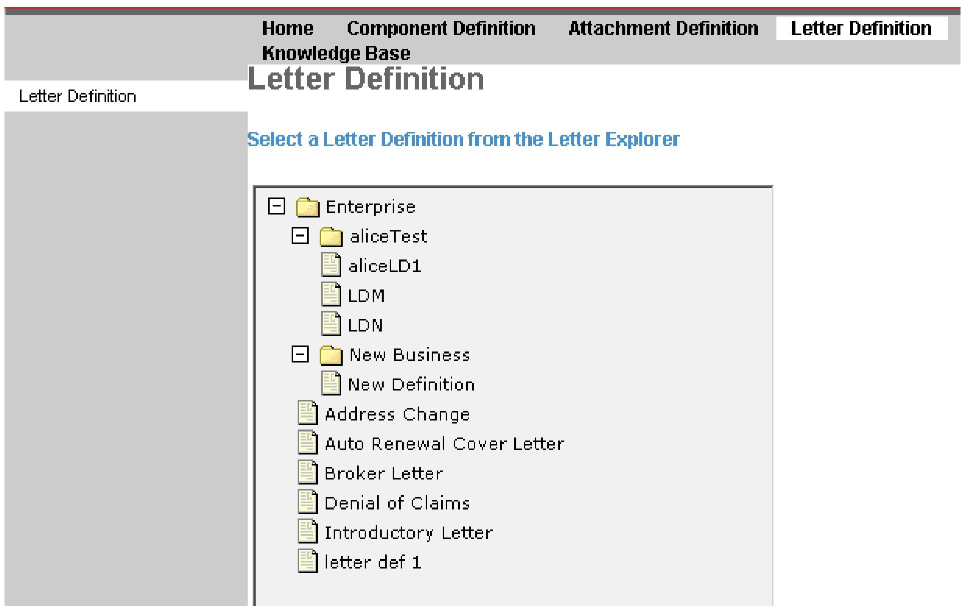
- *Working with Component Definitions* on page 41
- *Working with Attachment Definitions* on page 50

Working with Letter Definitions

To work with letter, component and attachment definitions, you need to be assigned a Contributor role by your Administrator. See your Communicator Administrator for more information about roles, or see *Getting Started* on page 19.

Tip: At any point while working with a definition, you can save your work. If there is already a definition with the same name, enter a new name and click **Save**, or click **Cancel** to go back.

To generate a letter in Communicator, a User needs to select a letter definition that a Contributor has created. A letter definition is a collection of component definitions and attachment definitions that determine what information the letter should contain, as well as the recipients, the distribution methods and other details about the letter.



Example: You might create a letter definition called “Insufficient Funds” that a User selects when generating a letter indicating that a payment has been returned for insufficient funds.

This section includes the following information:

- *Creating a Letter Definition* on page 59
- *Modifying a Letter Definition Version* on page 72
- *Moving a Letter Definition* on page 73
- *Deleting a Letter Definition Version* on page 75

Related Topics

- *The Communicator Process* on page 28

- *Working with Component Definitions* on page 41
- *Working with Attachment Definitions* on page 50

Creating a Letter Definition

Before creating a new letter definition, determine if there is an existing Calligo model document that reflects the letter to be defined. If there is, you can create the letter definition without selecting component definitions and attachment definitions.

This section provides an overview of the letter definition creation process. See the referenced subsections in this section for directions on using each page in the creation process.

Order of Pages for Each Letter Definition Type

The following table shows the order in which the pages are presented for each letter definition type, with the Contributor Home being the first page presented. In the subsequent sections, the various pages themselves are explained, including minor variations in some of them that occur depending on the chosen letter definition type.

Page Name	Fixed & Custom Letter Definition	Model Document Letter Definition
Contributor Home	●	●
Definition	●	●
Definition Properties	●	●
Definition Type	●	●
Definition Description	●	●
Definition Components	●	
Add-Ins	●	
Distribution Options	●	●
Variable Data	●	
Retention	●	●
Knowledge Base	●	●

Related Topics

- *Creating a Letter Definition* on page 59
- *Definition Type Page* on page 61

To begin creating a letter definition

1. In the Communicator **Home** page, click **Letter Definition**.

   The **Letter Definition** page opens, showing folders that contain letter definitions.

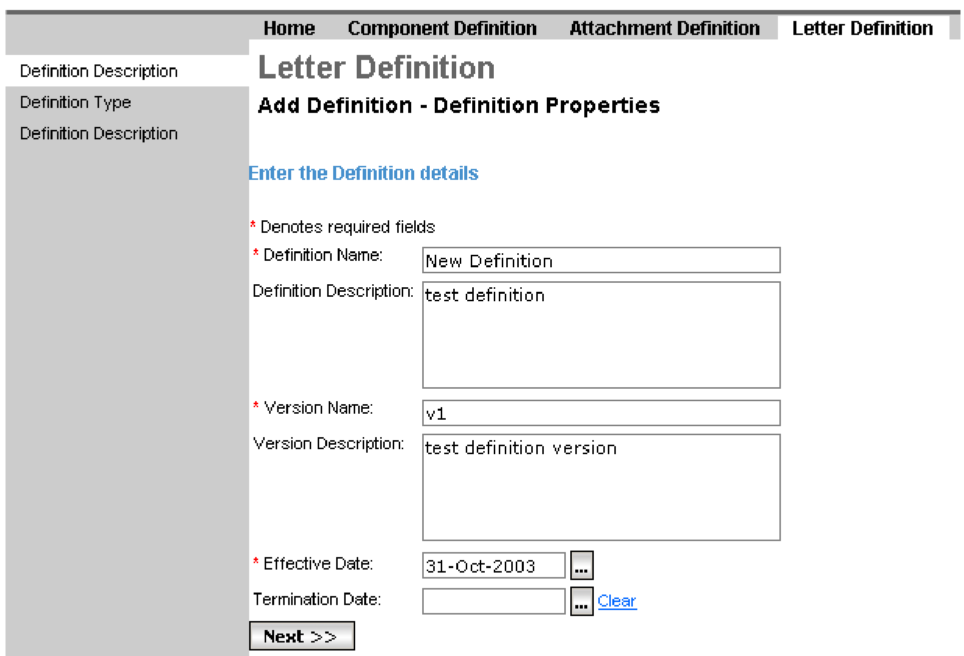
2. Select the folder in which to create a letter.
3. Click **Create**.

Note: Be sure to select a folder, and not a letter definition within a folder. If you select a letter definition, you will not be able to proceed. You can determine a folder by its icon, and a letter definition by its page icon.

The first in a series of pages is displayed that you will use to define the letter definition.

Tip: You can always return to the previous page if it is listed in the history of pages used in this session on the left side of your present page.

Definition Properties Page



Note: A red asterisk appears next to all required fields.

1. The **Definition Properties** page opens.
2. Enter a **Definition Name, Definition Description, Version Name** and **Version Description**.
3. Select the **Effective** and **Termination Dates**.
4. Click **Next**.

Definition Type Page

1. The **Add Definition - Definition Type** page opens.
2. Select a **Letter Definition Type**:
   - **Fixed** – A user using a fixed letter definition does not see the **Select Components** page, and cannot add or remove components or change the order in which they appear.
   - **Custom** – A user using a custom letter definition can use the **Select Components** page to include and exclude optional components in the generated letter, and change the order in which they appear.
   - **Existing Calligo Model Document** – Indicates where to use an existing Calligo model document which does not require assembly steps for adding components and add-ins. You can still associate Knowledge Base articles to this definition.

Important: Verify the effective and termination dates of the Calligo model document to ensure that the model is not already terminated or you will not be able to use it.

3. Click **Next**.

Definition Description Page

Note: The fields that are displayed on the **Definition Description** page depend on the **Definition Type** selected on the previous page.

1. The **Definition Properties** page opens.
2. In the **General** area, select:
   - if **Reviewer Approval** is **Required**
   - if it is a **Confidential** letter: confidential letters apply only to fixed letter definitions and definitions based on an existing Calligo model document. A custom letter definition cannot be confidential.
3. In the **Distribution** area, select a:
   - **Distribution Template** – These are used to determine distribution details, and are set up by your Administrator.
   - **Distribution Mode** – Letters generated from letter definitions with a **Real Time** distribution mode are delivered immediately. Letters generated from letter definitions with a **Batch** distribution mode are delivered at a deferred time.
   - **Printer Group -** Defines which printer will be used for printing letters generated from this letter definition. Printer groups are set up by your system administrator.
4. To include a **Sample Letter** that Users and Reviewers can reference, browse to the location in the specific repository where a sample of the letter is stored. (See *Selecting a File for a Definition Version* on page 37 for more information on how to browse a repository.)

When you select the sample from a repository, the **Repository** and **File** fields will populate.

Note: The **Calligo Model Document** area will only display if you selected Calligo model document as your definition type.

5. In the **Calligo Model Document** area, browse to a Calligo model document upon which to base the letter definition.
6. Click **Next**.

Components Page

This page does not appear if the definition is based on a Calligo model document.

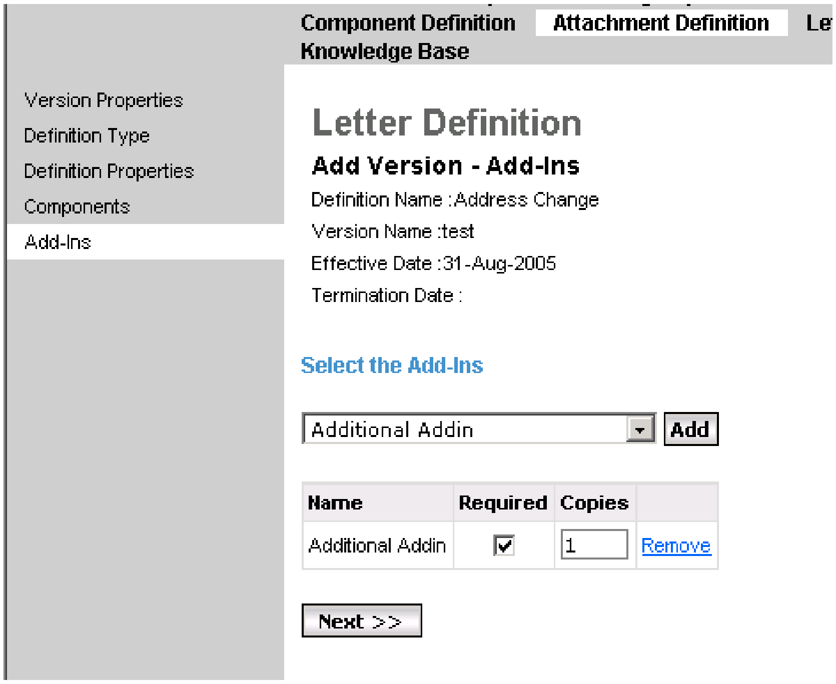
1. The **Components** page opens.
2. From the **Select Letter Components** drop-down list, select the component definitions to include in the letter definition version, then click **Add**.

   Each component appears in its own row within a table. Complete the remaining steps to configure each component.
3. Select the **Required** check box if the component must always be included in letters generated from the letter definition version.
4. In the **Usage Rules** column, select how the components will be used in the generated letter:
   - select **All** if the component should appear in the letters to all recipients
   - select **Original only** if the component should appear in the letters to the primary recipients only
   - select **CC Only** if the component should appear in the letters to the selected carbon copy recipients only
   - select **CC Block** if component should be the content for the carbon copy block in the letter
   - select **Attachment Notification** if the component should be the content for the attachment notification in the letter
5. To change the order in which the components will appear in the letter, click the small up or down arrow beside a component to move it.
6. When you are done making your changes, click **Next**.

Note: For more information about **CC only**, **CC block** and **Attachment Notifications**, see *Letter Definition Elements and Usage Rules* on page 35.

Add-Ins Page

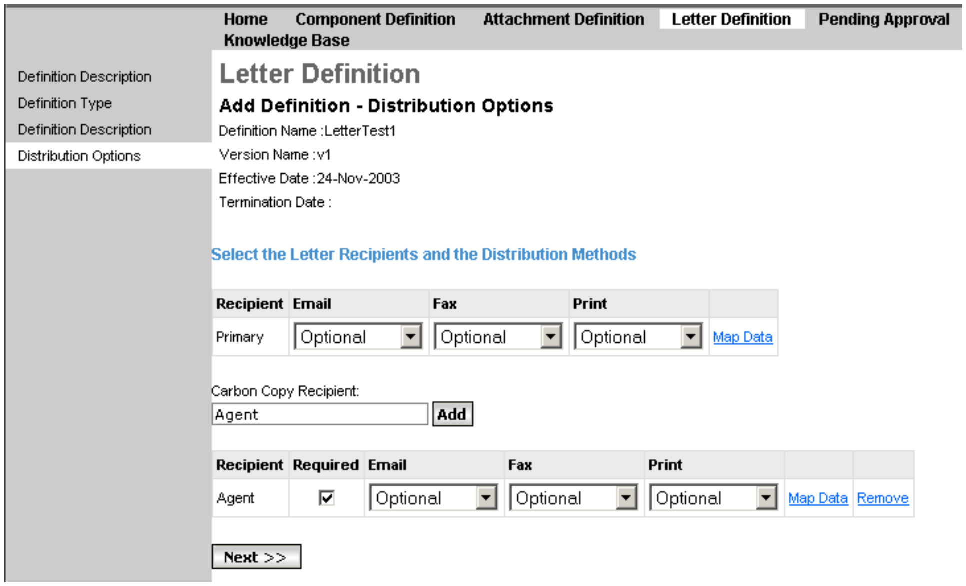
Note: This page does not appear if the definition is based on a Calligo model document.



1. The **Add-Ins** page opens.
2. From the drop-down list, select the add-ins to include in the letter definition and click **Add** after selecting each one.

   Each add-in is displayed in its own row.
3. To indicate that the add-in is required for the letter definition, select the **Required** check box. If cleared, the add-in is optional.
4. Enter the number of **Copies**.
5. To change the order in which the add-ins will be included in the final generated package, click the small up or down arrow beside the add-in to move it.
6. To remove a selected add-in, click **Remove**.
7. When the add-ins are all present and in the proper order, click **Next**.

Distribution Options Page



Note: The distribution modes may vary depending on the distribution template used for this letter definition, configured by your Administrator.

1. The **Distribution Options** page opens.
2. From the drop-down lists, select the appropriate distribution methods by which the letter can be sent to the **Primary Recipient**:
   - select **Optional** to allow a user to select this distribution method
   - select **Required** if the letter must be distributed by this distribution method
   - select **Unavailable** if this distribution method cannot be used
3. To set up additional recipients to receive a carbon copy of the letter, complete the following steps for each recipient that *must* receive a copy of this letter or *can* receive a copy at the user's discretion:

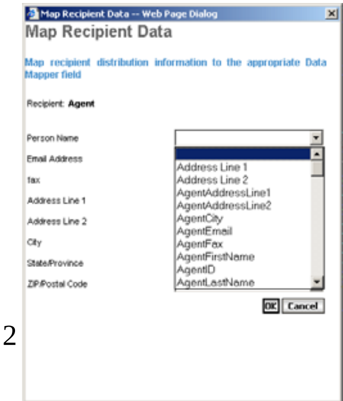
   a. Enter the **Title/Role** of the **Carbon Copy Recipient**, then click **Add**.

   b. If the **Carbon Copy Recipient** must get a copy of the letter, select the **Required** check box. If it is optional whether the **Carbon Copy Recipient** gets a copy of the letter, clear the check box.

   c. From the drop-down lists, select the appropriate distribution methods by which the copy of the letter can be sent to this recipient: follow the procedure in step 2.

   d. To remove a **Carbon Copy Recipient** from the list, click the **Remove** link beside the recipient to be removed.
4. For the **Primary** or **Carbon Copy Recipient**, you can **Map Recipient Data**. This involves matching fields from a set of recipient addressee information to variables in the data dictionary.

1 2



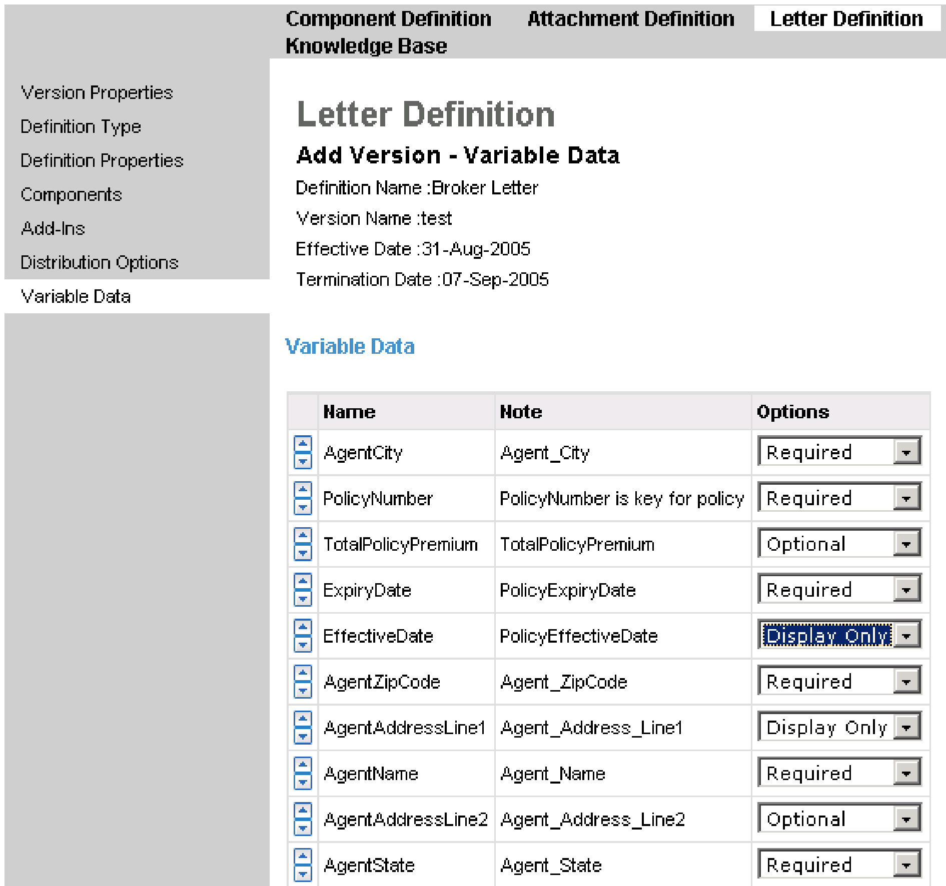
For example, **Address Line 1** (in figure 1) can be mapped to **AgentAddressLine1** in the drop-down list of figure 2. You would select **AgentAddressLine1** from the drop-down selection list for the **Address Line 1** to map that data to **Address Line 1**.

5. When you are done mapping, click **OK**. The **Map Recipient Data** dialog box closes.

6. Click **Next**.

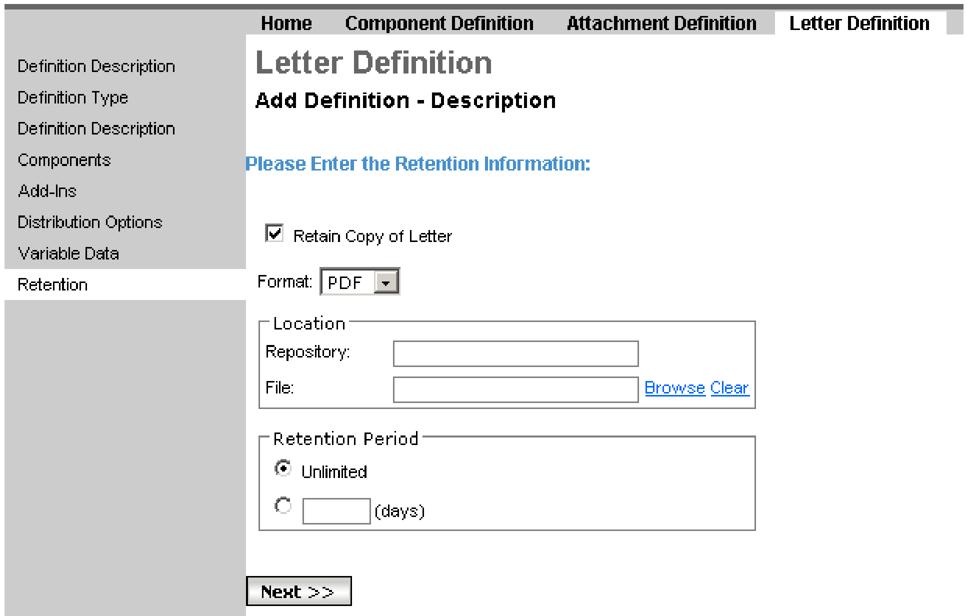
Variable Data Page

Note: This page only appears for fixed and custom letters when the selected components contain variables.



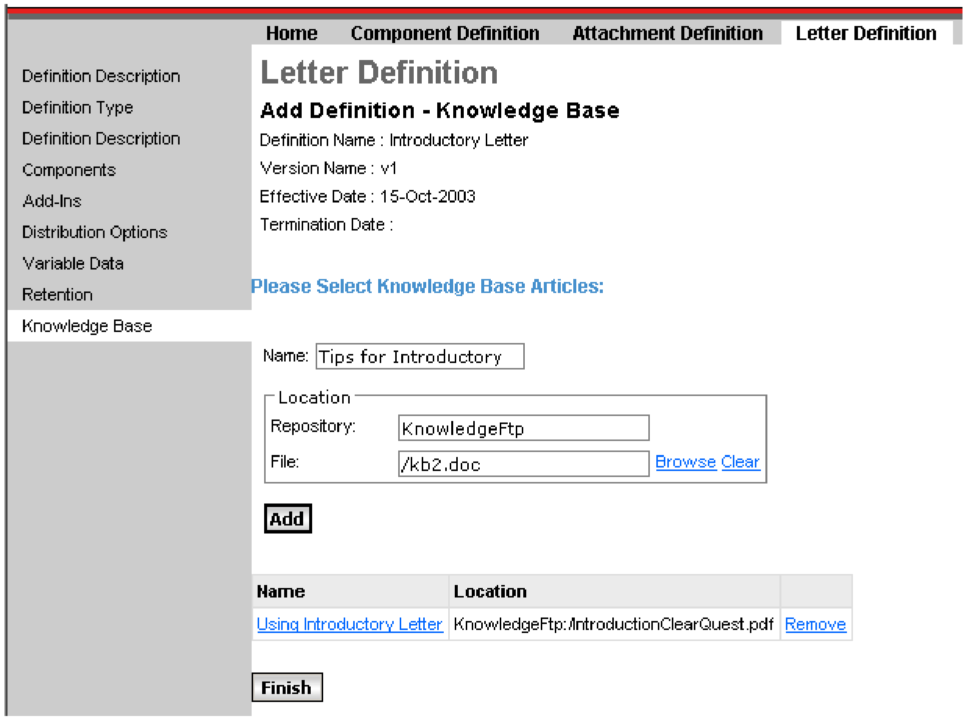
1. The **Variable Data** page opens.
2. The **Name** and **Note** columns list all of the variable data included in all the component definitions for this letter definition. From the drop-down selection lists, indicate whether this variable data is:
   - **Required** – the User must enter the information when creating the letter
   - **Optional –** the User can enter the information or ignore it
   - **Display Only** – the information is already entered and cannot be edited
   - **Hidden** – the field is not visible for editing: use this for data that is confidential, such as a medical condition
3. To change the order in which the variable data will appear on the **Verify Data** screen during **Letter Creation**, click the small up or down arrow beside the variable data to be moved.
4. When the **Variable Data** is in the proper order, click **Next**.

Retention Page



1. The **Retention** page opens. If you plan to keep a copy of the letter, select **Retain Copy of Letter**. If you do not select this check box, the letter will not be retained.
2. From the drop-down selection box, select the **Format** for retention: PDF, DOC or TIFF.
3. Browse to the **Location** for file storage. When indicated, the **File** (with path) and **Repository** fields will be completed. (For more information on browsing for a file, see *Selecting a File for a Definition Version* on page 37.)
4. In the **Retention Period**, select **Unlimited** to keep a copy of the letter indefinitely, or enter a number of days to limit the amount of time in which to keep the letter in the retention location selected.
5. Click **Next**.

Knowledge Base Page



1. The **Knowledge Base** page opens.
2. Enter a **Name** for the article.
3. **Browse** to the location where the article is kept. This location is set up by your Administrator. For more information, see *Selecting a File for a Definition Version* on page 37.
4. Click **Add**.

   The Knowledge Base article is now associated to this version of the letter definition. If you change your mind, click **Remove** beside the article name and location.

   You may have many Knowledge Base articles for any definition.
5. Click **Finish**. You are returned to the **Letter Definition** main page.

Related Topics

- *Working with Component Definitions* on page 41
- *Creating a Letter Definition* on page 59
- *Modifying a Letter Definition Version* on page 72

Editing a Letter Definition

To edit a letter definition

1. In the Contributor **Home** page, click **Letter Definition**.
2. In the **Letter Definition** page, select a letter definition to work with, then click **Modify.**
3. In the **Letter Definition – Definition Description** page, optionally enter or edit a description for the letter definition in the **Definition Description** field.
4. Click **Confirm**.

   Your changes are made and you are returned to the **Letter Definition** page.

Testing Letter Definitions

You can test letter definitions to determine if they are ready for production. The definition must be complete, but can be published or unpublished.

Note: The procedures and pages after step 3 are the same as those for adding a letter definition version. For the complete instructions, see *Creating a Letter Definition Version* on page 71.

To test a letter definition

1. From the Communicator **Home** page, select **Letter Definition**.

   The **Letter Definition** page opens.
2. Select a definition to test and click **Test Definition**.
3. The **Test Letter Definition** page opens. Enter a transaction date upon which to test, then click **Next**.
4. If the letter definition is defined as “Custom”, the **Select Components** page opens: go to step 5. Otherwise, the **Select Add-Ins** page opens: go to step 6.
5. In the **Select Components** page, you can reorder the components for the letter definition if it is a **Custom** type letter definition. Select the up or down arrow button next to the component to move it.

   Also in the **Select Components** page, you can select which components to include in the letter definition if it is a **Custom** type letter definition.

   In the **Selected** columns, a grayed-out check box indicates a required component that you cannot add or remove from the letter definition. However, check boxes that are not grayed out indicate optional components. You can include or exclude optional components for all recipients from the letter definition by selecting or clearing the corresponding check box in the **Selected** column.
6. In the **Select Add-Ins** page, you can optionally add **Additional Add-Ins** from the drop-down selection list, then click **Add** for each one to be added.
7. Click **Select Recipients**.

8. In the **Recipients** page, select the distribution methods for each recipient. Click **Next**.
9. In the **Enter KeyData** page, enter the key data (for example, the policy number) then click **Next**.
10. In the **Verify Data** page, confirm that the populated recipient data is correct or edit it accordingly, then click **Next**.
11. In the **Distribution** page, enter the distribution data for the **Primary** and **Secondary** recipients. Select the recipient with which to test the generation, then click **Generate Correspondence**.
12. The **Generated Correspondence** page displays the generated letter for the selected recipient.
13. Click **Exit** at the top right of your page. You are returned to the **Home** page.

Managing Letter Definition Versions

Note: Work in Progress uses the version of the definition that was used at the start of the work with that Definition, not the current version of the definition (if it is not the same). Changes in the more recent version are not reflected in the generated letter.

Creating a Letter Definition Version

To add a letter definition version

1. In the Contributor **Home** page, click **Letter Definition**.

The **Letter Definition** page opens, showing all folders created by the Administrator.

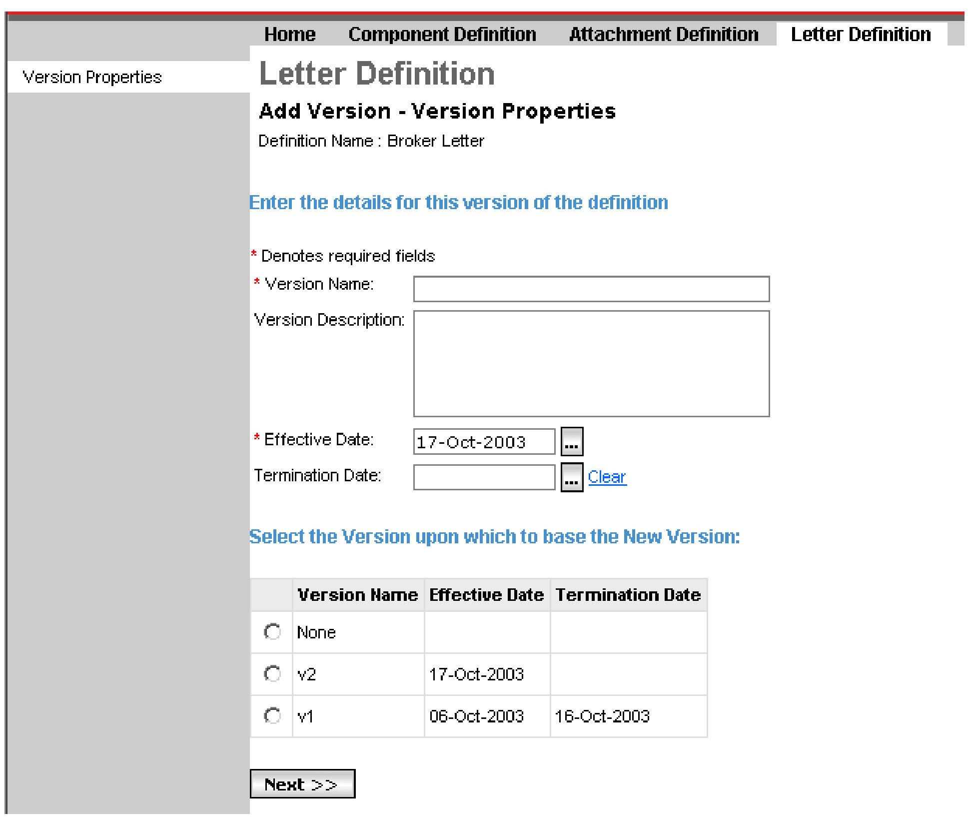
2. Select the definition to add a version to, then click **Manage Versions**.

Manage Versions Page

3. The **Manage Versions** page opens. All of the versions for the selected Letter Definition are displayed in a table.

4. Click **Add Version**.

Version Properties Page



1. The **Version Properties** page opens.

2. Enter a unique **Version Name** and optionally enter a **Version Description**.
3. Select an **Effective** and (optionally) a **Termination Date**.
4. From the list of existing versions, choose a version upon which to base the new version, or choose **None**.
5. Click **Next**.
6. In the **Edit Version - Definition Type page**, enter the definition type. For details, see *Definition Type Page* on page 61.
7. In the **Edit Version - Definition Description**, enter the definition description. For details, see *Definition Description Page* on page 61.
8. In the **Edit Version - Components** page, enter the definition's components. For details, see *Components Page* on page 62.
9. In the **Edit Version - Add-Ins** page, enter the definition's add-ins. For details, see *Add-Ins Page* on page 63.
10. In the **Edit Version - Distribution Options** page, enter the definition's distribution methods. For details, see *Distribution Options Page* on page 64.
11. In the **Edit Version - Variable Data** page, enter the definition's distribution variable data. For details, see *Variable Data Page* on page 66.
12. In the **Edit Version - Retention** page, enter the definition's retention data. For details, see *Retention Page* on page 67.
13. In the **Edit Version - Knowledge Base** page, enter the definition's knowledge base data. For details, see *Knowledge Base Page* on page 68.
14. Click **Finish**. You are returned to the **Manage Versions** page.

Modifying a Letter Definition Version

To modify a letter definition version

Note: You cannot edit versions that are no longer in effect.

1. In the Communicator **Home** page, click **Letter Definition**.
2. The **Letter Definition** page opens, showing folders that contain letter definitions.
3. Select the letter definition to modify.
4. Click **Manage Versions**. The **Manage Versions** page opens.
5. Choose the version to work with and click its **Edit** link.
6. In the **Edit Version - Version Properties** page, you can optionally enter a **Version Description**, then click **Next**.
7. In the **Edit Version - Definition Type page**, update the definition type. For details, see *Definition Type Page* on page 61.
8. In the **Edit Version - Definition Description**, update the definition description. For details, see *Definition Description Page* on page 61.

9. In the **Edit Version - Components** page, update the definition's components. For details, see *Components Page* on page 62.
10. In the **Edit Version - Add-Ins** page, update the definition's add-ins. For details, see *Add-Ins Page* on page 63.
11. In the **Edit Version - Distribution Options** page, update the definition's distribution methods. For details, see *Distribution Options Page* on page 64.
12. In the **Edit Version - Variable Data** page, update the definition's distribution variable data. For details, see *Variable Data Page* on page 66.
13. In the **Edit Version - Retention** page, update the definition's retention data. For details, see *Retention Page* on page 67.
14. In the **Edit Version - Knowledge Base** page, update the definition's knowledge base data. For details, see *Knowledge Base Page* on page 68.
15. Click **Finish**. You are returned to the **Manage Versions** page.

Moving a Letter Definition

You can move a letter definition from one folder to another in the Letter Explorer.

To move a letter definition

1. In the Communicator **Home** page, click **Letter Definition**.

   The **Letter Definition** page opens, showing all folders created by the Administrator.
2. Select the letter definition to move, then click **Move**.
3. The name of the letter definition displays, with a **Confirm Move** button and **Cancel Move** button.
4. Select the folder in which to move the letter definition, then click **Confirm Move**. To cancel, click **Cancel Move**.

Related Topics

- *Creating a Letter Definition* on page 59
- *Modifying a Letter Definition Version* on page 72
- *Deleting a Letter Definition Version* on page 75

Publishing a Letter Definition Version

To publish a letter definition version

1. In the Communicator **Home** page, click **Letter Definition**.

   The **Letter Definition** page opens, showing folders that contain letter definitions.
2. Select the letter definition to modify. Click **Manage Versions**.

3. In the **Manage Versions** page, choose the version to publish and click its **Publish** link.

   The **Publish Version** page opens.

4. Click **Confirm**. You are returned to the **Manage Versions** page and the version is now published.

Unpublishing a Letter Definition Version

To unpublish a letter definition version

1. In the Communicator **Home** page, click **Letter Definition**.

   The **Letter Definition** page opens, showing folders that contain letter definitions.

2. Select the letter definition to modify. Click **Manage Versions**.

3. In the **Manage Versions** page, choose the version to unpublish and click its **Unpublish** link.

4. The **Unpublish Version** page opens.

5. Click **Confirm** to unpublish the version. You are returned to the **Manage Versions** page.

Managing Dates

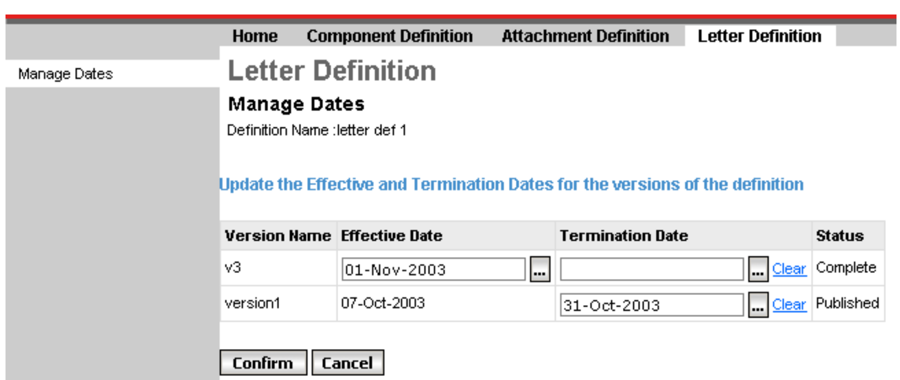
You can add, delete, or manage version dates of letter, component, and attachment definitions.

To manage dates for a letter definition

1. In the Contributor **Home** page, select **Letter Definition**.

2. In the **Letter Definition** page, select a definition to work with and click **Manage Versions**.

3. In the **Manage Versions** page, click **Manage Dates**. The **Manage Dates** page opens.



4. The basic rules for **Effective** and **Termination Dates** are:

- the later version's **Effective Date** must follow the earlier version's **Termination Date**
- the earlier version must **Terminate** before the later version can become **Effective**
- a **Termination Date** is optional for the most recent version
- you can only modify dates that occur in the future, not current and past dates
- versions require **Effective** and **Termination Dates** to be entered to clarify when a definition becomes effective (active or available) and when it should no longer be active or available

5. Click **Confirm** to confirm changes made to the dates for your definition versions. You are returned to the **Manage Versions** page.

Deleting a Letter Definition Version

You can only delete letter definition versions that will be in effect in the future.

To delete a letter definition version

1. In the Communicator **Home** page, click **Letter Definition**.

The **Letter Definition** page opens, showing folders that contain letter definitions.

2. Select the letter definition of which to delete a version, then click **Manage Versions**.

3. Click the **Delete** link for the version to delete.

Note: You can delete only letter definition versions that are effective in the future, not past and current versions.

4. The **Delete Version** page opens.

5. Click **Confirm** to delete the version, or click **Cancel** to exit.

You are returned to the **Manage Versions** page.

Related Topics

- *Creating a Letter Definition* on page 59
- *Modifying a Letter Definition Version* on page 72
- *Moving a Letter Definition* on page 73
- *Creating a Letter Definition Version* on page 71

Chapter 4

User and Reviewer Roles

Note: Reviewers can also perform User tasks, but Users cannot perform Reviewer tasks.

This chapter includes information about:

Generating a Letter

To generate a letter with Communicator, you need to select a letter definition that a Contributor has created. A letter definition consists of a number of component definitions, and may also include a number of attachment definitions.

Note: You cannot generate a letter unless you have a valid user ID for generating letters. Your Communicator Administrator can provide more information about obtaining a valid user ID.

To understand the process of generating letters, please see *The Communicator Process* on page 28.

Warning: If you have a User or Reviewer role and the Administrator has not added you to any workgroups that have letter definitions assigned to them, you will still see folders, but they will appear empty. You will also see folders with letter definitions to which you do not have access, which will also appear empty.

The general steps in creating a letter are:

1. Select a letter definition.
2. Select components if it is a custom letter definition.
3. Select Add-Ins.
4. Select recipients (to whom the generated letter is going).
5. Enter key data (account number, etc.).
6. Verify letter data.
7. Verify distribution data.
8. Generate letter.
9. Review and release a letter.

Other pages that you may use include:

- *The Work in Progress Page* on page 87
- *Viewing Knowledge Base Documents* on page 96
- *Searching for Letters* on page 98

To generate a letter

1. From the Communicator **Home** page, click **Letters**.

   The **Select Letter** page opens, showing folders that contain letter definitions.

   To view a sample letter based on a letter definition, select the letter definition and click **View Sample**. If a sample has been provided, it displays beside the letter definition folders.
2. Select the letter definition to use, then click **Create Letter**.
3. A series of pages is displayed that you can use to generate a letter.

After completing each step, click the button at the bottom of the page to proceed to the next step, or click an earlier step at the left side of the page to return to that step.

Note: You can save a letter at any time.

For more information about each page, see

- *Select Components Page* on page 80
- *Select Add-Ins Page* on page 81
- *Recipients Page* on page 82
- *Enter Key Data Page and Verify Data Page* on page 83
- *Distribution Page* on page 84
- *Generated Correspondence Page* on page 85

4. On the last page (the **Generate Correspondence** page), click **Release**.

5. If the letter must be reviewed before being distributed, Communicator saves it in a **Pending Approval** state where it can be reviewed by the Reviewer of your workgroup.

If this letter does not need to be reviewed before being distributed, Communicator releases it for distribution.

For more information about Reviewers, see *Roles and Tasks* on page 20.

Related Topics

- *Saving a Letter as Work in Progress* on page 79
- *The Work in Progress Page* on page 87
- *The Tracking Page* on page 91
- *Viewing Knowledge Base Documents* on page 96

Saving a Letter as Work in Progress

While generating a letter, you can click **Save** any time to save the letter as work in progress. Selecting a Work in Progress letter returns you to the pages you used in the letter creation process, where you can edit or leave unchanged the contents on each page.

If the letter definition, component definition, or attachment definition are changed, continuing with the saved letter in Work in Progress will not reflect these changes. The letter and its definitions are based on the version of the letter definition used at the time of the letter creation.

Related Topics

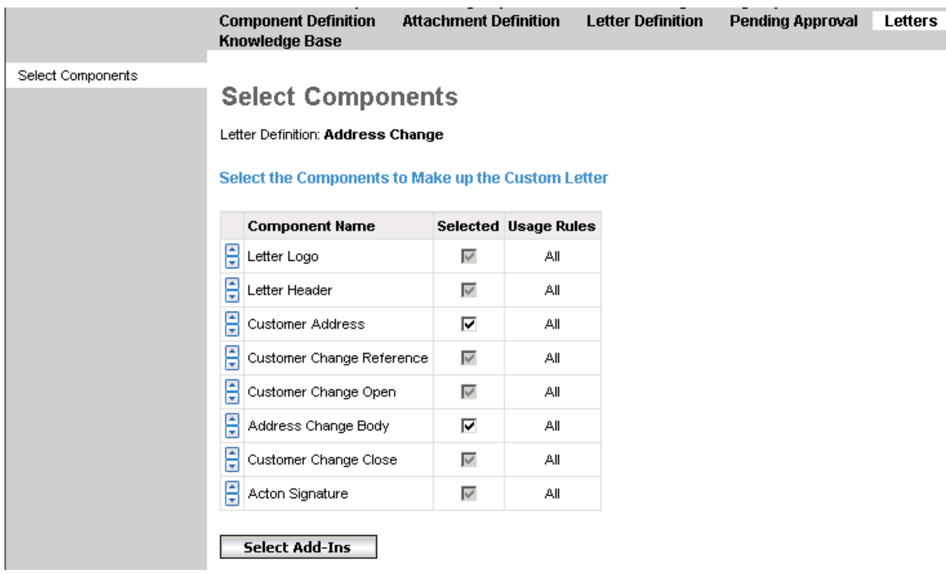
- *The Work in Progress Page* on page 87

Select Components Page

Note: If the letter definition is marked as **Fixed**, this step is skipped in the letter generation process.

The **Select Components** page lists the components you can include in your letter. When generating a letter, you can add or remove any optional components, and change the order of each component.

A letter definition consists of one or more component definitions. A component definition refers to a Calligo model document section. The Calligo model document section determines what information the component definition adds to the letter.



Example: A component definition might add a company logo, policyholder address, or specific text to a letter.

The **Select Components** page also lists the **Usage Rules** for each component. You cannot change the **Usage Rules** from this page. For descriptions of the **Usage Rules**, see step 4 on page 62.

To add or remove a component from the Letter

In the **Selected** columns, a grayed-out check box indicates a required component that you cannot add or remove from the letter. However, check boxes that are not grayed out indicate optional components. You can include or exclude optional components from the letter for all recipients by selecting or clearing the corresponding check box in the **Selected** column.

Important: If a **CC Only**, **CC Block** or **Attachment Notification** component is specified in the letter definition, you must select at least one component definition.

To change the position of a Component in a Letter

- Click the small up or down arrow beside the component to move it.

To proceed to the next step, click **Select Add-Ins**.

Related Topics

- *Generating a Letter* on page 78

Select Add-Ins Page

The letter definition you are using may have add-ins associated with it. There are three types of add-ins:

- **Required** add-ins, denoted by a red asterisk, are part of the letter definition that must be included with the letter.
- **Optional** add-ins are a part of the letter definition that you can optionally include with the letter, if you choose.
- **Additional** Add-ins are not part of the letter definition, but can be included with the generated letter.

Note: Red asterisks indicate required information throughout Communicator.

When generating a letter, you can use the **Select Add-Ins** page to add or remove optional or additional add-ins, and indicate how many copies of a particular add-in are to be included with the letter.

Example: If you are sending a letter advising that a check was returned for insufficient funds, “Check Copy” could be a required add-in, and “Payment Options Brochure” could be an optional add-in.

To provide location information

When location is not indicated in the letter definition, the user may need to provide location details.

1. Click **Browse**, then navigate to the file location.
2. Select the add-in.

   The **Repository** and **File** fields are populated.

To add an additional add-in

- Select the add-in from the **Select the Additional Add-Ins** drop-down list, and click **Add**.

To remove an additional add-in

- Click **Remove** beside the add-in.

To indicate the number of copies of an add-in

- Enter the number of copies in the **Copies** field beside the add-in.

Note: To remove optional add-ins, set the number of copies to zero (0).

To change the position of an add-in

- Click the small up or down arrow beside the add-in to move it.

When using the **Select Add-Ins** page, note that:

- add-ins are the same as Attachments
- if you are not sure whether to include an optional add-in, check the Knowledge Base: for more information, see *Viewing Knowledge Base Documents* on page 96

To proceed to the next step, click **Select Recipients**.

Related Topics

- *Generating a Letter* on page 78

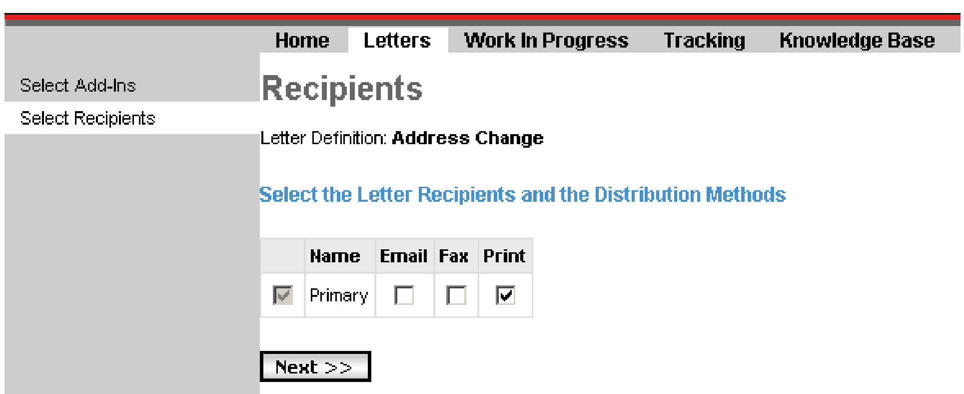
Recipients Page

When generating a letter, the **Recipients** page shows the recipients for the letter. The **Recipients** page always includes the person to whom the letter is addressed (the **Primary** recipient) and any **Carbon Copy** recipients who are copied in.

The letter definition determines:

- which recipients are mandatory or optional
- which distribution methods are available for each recipient.

If any check boxes in the **Recipients** page are selected but grayed out, the recipient or distribution method is mandatory. If any check boxes are unselected but grayed out, the distribution method is unavailable.



To control which recipients receive a letter and how they receive it

1. In the **Recipients** page, select the check box beside each recipient who should receive the letter.
2. Select the appropriate available distribution method check boxes for each selected recipient: **Print**, **Fax** and **E-mail**.

Note: You must select at least one distribution method for each selected recipient.

3. Click **Next** to proceed.

Related Topics

- *Generating a Letter* on page 78
- *Distribution Page* on page 84

Enter Key Data Page and Verify Data Page

When generating a letter, you can use:

- the **Keydata** page to enter the information that makes your letter unique for an individual
- the **Verify Data** page to verify, change and add any data required in the Letter

Key Data

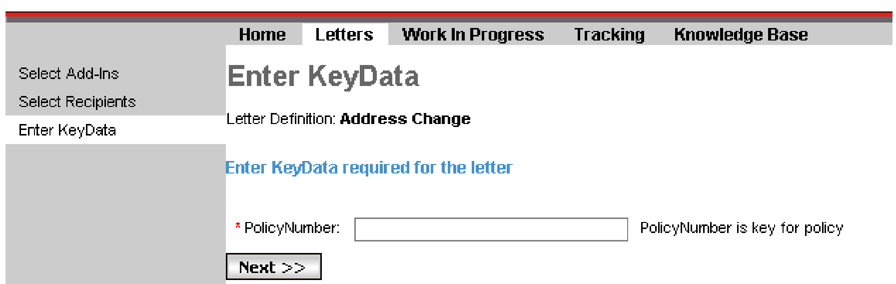
Key data is data that indicates how to retrieve a particular set of data for a specific letter for a specific individual.

Example: For a letter definition that notifies a policyholder of a payment returned for insufficient funds:

- the key data could be the policy number
- the variable data could include the amount of the returned payment, any NSF charges, and the customer name and address

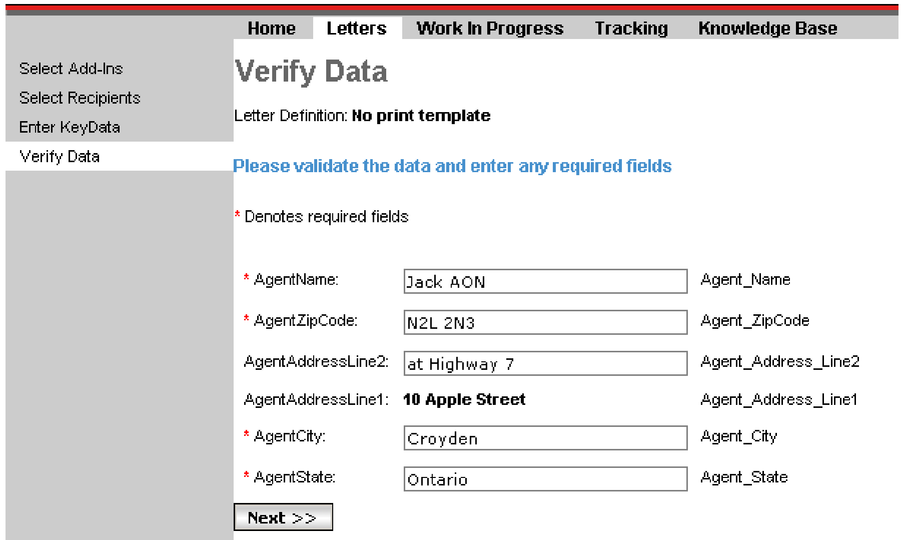
To enter key data and variable data

1. Enter the information requested in the **Enter Keydata** page. All required fields have an asterisk (*).



2. Click **Next**.

The **Verify Data** page opens, showing all the variable data elements included in the letter components that make up the letter.



3. Verify that the variable data is correct, add any missing information and change any incorrect information.

Users will not see fields that were selected to be hidden in the letter definition during letter creation.

Users cannot change fields that were selected to be “display only” in the letter definition.

Note: For help in deciding what to enter in the **Keydata** or **Verify Data** pages, click the **Knowledge Base** button. For more information, see *Viewing Knowledge Base Documents* on page 96.

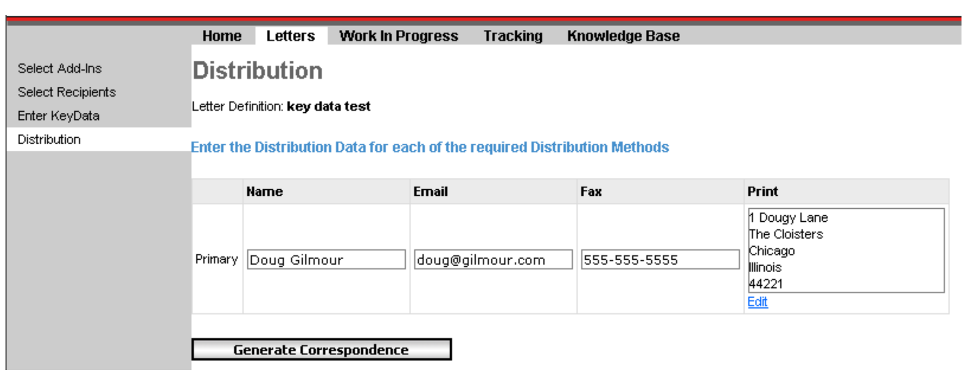
4. Click **Next** to proceed.

Related Topics

- *Generating a Letter* on page 78

Distribution Page

When generating a letter, use the **Distribution** page to enter or verify all specific distribution information, for example, the **Mailing Address** or **Fax Number**.



Tip: If a distribution method you want is listed as **Not Selected**, return to the **Recipients** page and select it.

To enter or change specific distribution information for each recipient

1. To enter or change the recipient's **Name**, enter the information in the **Name** field.
2. Enter or change the recipient's **Email** or **Fax Number.**
3. To enter or change a recipient's print and mail address:
   a. In the **Print** column of a recipient, click **Edit**.
   b. Enter or update the required information in the data entry fields.
4. Click **OK** to save your changes.
5. To go to the next step in the generation process, click **Generate Correspondence**.

Related Topics

- *Generating a Letter* on page 78
- *Recipients Page* on page 82

Generated Correspondence Page

Important: If the letter definition is marked as **Confidential**, this page is left out of the Letter Generation process.

The **Generated Correspondence** page displays the generated letter in Microsoft Word, ready to be released.

You can use the **Generated Correspondence** page to:

- edit and format unprotected sections of generated letters
- save the letter as Work in Progress
- release the letter
- exit without saving the letter

To edit and format the generated letter before releasing it

- Edit the text directly in the letter.
- Format the text by using any of the standard Microsoft Word commands available in the generated letter:
  - Click  to show the Word menu.
  - Use the function icons in the toolbar at the top of the letter.
  - Right-click anywhere in the letter for available functionality.

Note: Depending on what component definitions the letter definition uses, you may not be able to edit some sections of the letter. If you are able to edit sections that you think should not be edited, contact your Communicator Administrator.

To save the letter as Work in Progress without releasing it

- Click **Save**.

To change the printer or distribution mode

Your system administrator may have configured Communicator to allow you to select the printer for the letter and/or to change the distribution mode for the letter. If the **Printer** and **Distribution Mode** are displayed, then you can change one or both of these as follows:

To change the printer, select a printer from the **Printer Group** drop-down list. The default printer is **As Assigned**. This printer is determined by the letter definition, or a user, or a general system configuration setting. Your system administrator determines the printers that appear on this list.

To change the distribution mode, select a value from the **Distribution Mode** drop-down list: **Real time** will distribute the letter immediately if no review is required, or after the letter is approved; **Batch** will distribute the letter at a defined, system-configured time. The default value is **As Assigned** and is determined by the letter definition.

To release the letter

- Click **Release**.

Note: Released Letters do not appear in the **Work in Progress** page.

Related Topics

- *Generating a Letter* on page 78
- *The Work in Progress Page* on page 87
- *The Tracking Page* on page 91
- *Viewing Knowledge Base Documents* on page 96

The Work in Progress Page

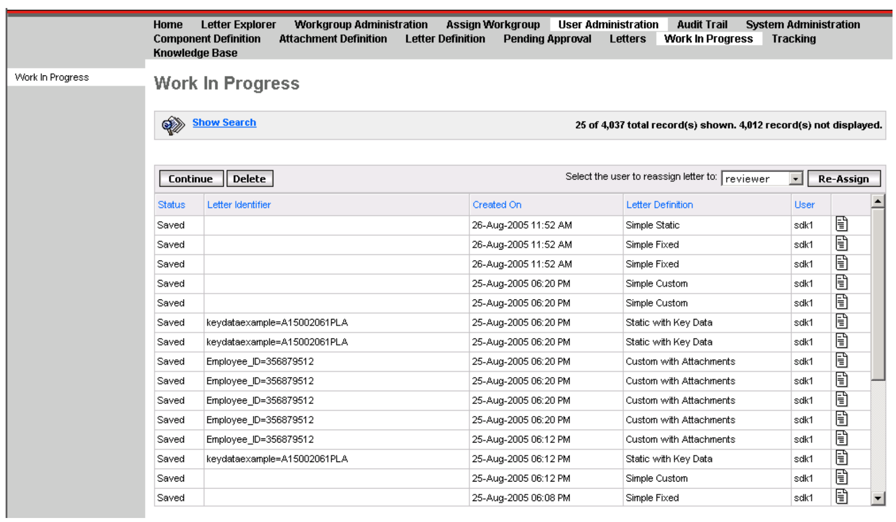
This section contains information about:

- *Contents of the Work in Progress Page* on page 87
- *Resuming Work on a Work in Progress Letter* on page 88
- *Deleting a Work in Progress Letter* on page 89
- *Reassigning a Work in Progress Letter* on page 89

To open the Work in Progress page

- In the Communicator **Home** page, a User or Reviewer clicks **Work in Progress.**

  The **Work in Progress** page opens.



Note: You cannot open the **Work in Progress** page unless you have a valid user ID for generating letters. Your Communicator Administrator can provide more information about obtaining a valid user ID.

Contents of the Work in Progress Page

If you click **Save** while creating a letter, Communicator saves your unreleased letter in the **Work in Progress** page. When Users or Reviewers recall letters from distribution, or Reviewers reject a letter, it will be listed here, with a memo to indicate the reason for the rejection or recall.

A User can only see the **Work in Progress** letters that are assigned to that User. If you are a Reviewer, the **Work in Progress** page also shows the Work in Progress entries for all users that are within your workgroups.

Note: The **Work in Progress** page may not display all of the work in progress letters. If so, a message indicates the number of records not displayed. If the letter you are searching for does not appear, you can search for it. For more information, see

Searching for Letters on page 98. For more information, see *Searching for Letters* on page 98.

The **Work in Progress** page contains the following columns for Users and Reviewers:

- the **Status** indicates the current letter status
- a **Letter Identifier**, such as a policy number, uniquely identifies the letter; this column displays information only for letters that have key data entered
- the date that the letter was **Created on**
- the **Letter Definition** used to generate letter
- the **User** who created the letter: only Reviewers can see this column
- a letter icon is displayed if there is a copy of a generated letter: you can view the letter by clicking this icon
- a memo icon is displayed if there is a memo associated with this letter: memos can include information about why a letter has been rejected or recalled

Tip: You can click any column header to sort by the values in that column.

Related Topics

- *The Work in Progress Page* on page 87
- *Generating a Letter* on page 78
- *The Tracking Page* on page 91
- *Viewing Knowledge Base Documents* on page 96

Resuming Work on a Work in Progress Letter

To resume working on a Work in Progress letter

1. In the **Work in Progress** page, you can search for letters to resume: see *Searching for Letters* on page 98.
2. From the table, click the letter to resume to highlight it, then click **Continue**.
3. If you are resuming work on a custom letter, when you select the letter, the **Select Components** page opens. Select the required components.

   If you are resuming work on a fixed letter, the **Add-Ins** page opens, showing the attachments included in the letter definition you were using when you saved the Work in Progress letter. Select the required Add-Ins.

   If you are resuming work on a letter based on a Calligo model document, the **Select Recipients** page opens. Select the required recipients.
4. Enter and verify the key data.
5. Verify the distribution data.

6. Generate the letter.

Note: See *Generating a Letter* on page 78 to review more detail on each of the steps of the letter creation process.

When working with a Work in Progress letter, when you click the **Generate Correspondence** button, you will have two choices:

- **Keep Existing Correspondence** – the original letter will not be re-generated
- **Re-generate Correspondence** – the letter will be re-generated and any changes made to the original generated letter will be lost

Related Topics

- *The Work in Progress Page* on page 87
- *Generating a Letter* on page 78

Deleting a Work in Progress Letter

To delete a Work in Progress letter

1. In the **Work in Progress** page, you can search for letters to delete: see *Searching for Letters* on page 98.
2. From the table, click the letter to delete to highlight it, then click **Delete**.

   A confirmation message appears.
3. Click **OK** to delete the letter, or click **Cancel** to exit.

   The Work in Progress letter is deleted.

Related Topics

- *The Work in Progress Page* on page 87
- *Generating a Letter* on page 78

Reassigning a Work in Progress Letter

Reviewers can reassign a Work in Progress letter to a different User within the same workgroup or to another workgroup to which the Reviewer is also assigned.

Note: Your Communicator Administrator can provide more information about obtaining a valid Reviewer user ID.

To reassign a Work in Progress letter

1. In the **Work in Progress** page, you can search for letters to reassign: see *Searching for Letters* on page 98.
2. From the table, click the letter to be reassigned to highlight it.
3. Select a user from the **Select the user to reassign letter** drop-down list.

4. Click **Re-assign**.

   Communicator reassigns the letter to the user you selected.

Note: You can only reassign letters, based on letter definitions you have access to, to users in a workgroup in which you, as a Reviewer are a member.

Related Topics

- *The Work in Progress Page* on page 87
- *Generating a Letter* on page 78

The Tracking Page

The Tracking page shows information for all letters that have been or are:

Status column	Description
Archived	Letter has been distributed and archived.
Cancelled	Letter distribution was cancelled by the User.
Deleted	Letter was deleted.
Distributed	Letter was successfully delivered by email, fax, or print and mail.
Failed	Letter was not successfully distributed to all recipients. In Letter Tracking, this applies only to specific recipients.
Pending Approval	Letter is released by user and is waiting for Reviewer approval.
Pending Cancel	Letter is cancelled but not yet confirmed as cancelled.
Pending Delivery	Letter is released and approved and waiting for distribution.
Pending Recall	Letter recall not yet confirmed.
Ready for Distribution	Letter is ready to be distributed. Letters released through mass approval or mass redistribution of failed letters will first change to this state and then to Pending Delivery, once they are submitted for distribution.
Recalled	Letter is recalled by system upon request by User or Reviewer.
Rejected	Letter is rejected by Reviewer.
Released	Letter with approval required or without approval required is released to system for delivery.
Saved	Unreleased letter is saved by User.

You can perform the following tasks in the **Tracking** page:

- *Contents of the Tracking Page* on page 92
- *Viewing Details of a Letter in the Tracking Page* on page 93
- *Redistributing a Letter* on page 94
- *Recalling a Letter* on page 94
- *Deleting a Letter* on page 95
- *Searching Letter Identifier Fields* on page 98

To open the Tracking page

- From the Communicator **Home** page, click **Tracking**.

  The **Tracking page** opens.

Note: You cannot open the **Tracking** page unless you have a valid user ID for generating letters, or a valid Reviewer user ID. Your Communicator Administrator can provide more information about obtaining a valid user ID.

Related Topics

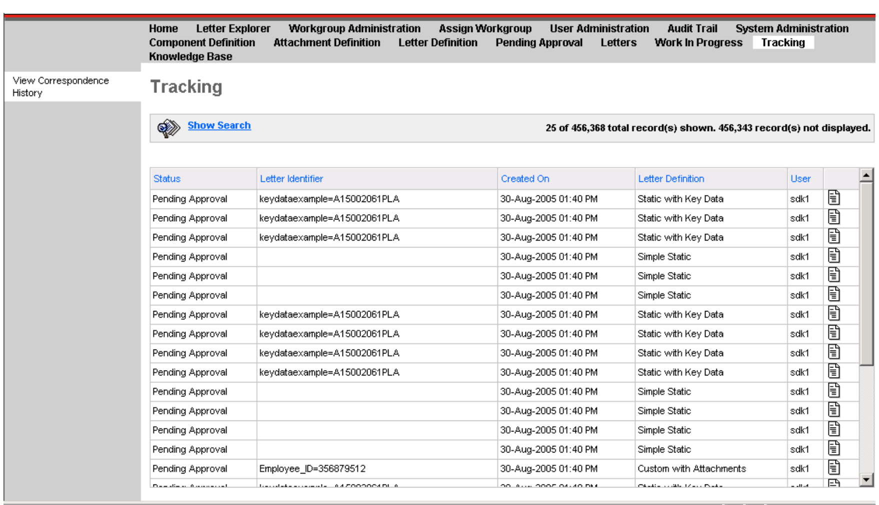
- *Generating a Letter* on page 78

Contents of the Tracking Page

The **Tracking** page contains the following columns:

- the **Status** indicates the current letter status
- a **Letter Identifier**, such as a policy number, uniquely identifies the letter; this column displays information only for letters that have key data entered
- the date that the letter was **Created on**
- the **Letter Definition** used to generate letter
- the **User** who created the letter: only Reviewers can see this column
- a letter icon  is displayed if there is a copy of a generated letter: you can view the letter by clicking this icon
- a memo icon  is displayed if there is a memo associated with this letter: memos can include information about why a letter has been rejected or recalled

Tip: You can click any column header to sort by the values in that column.

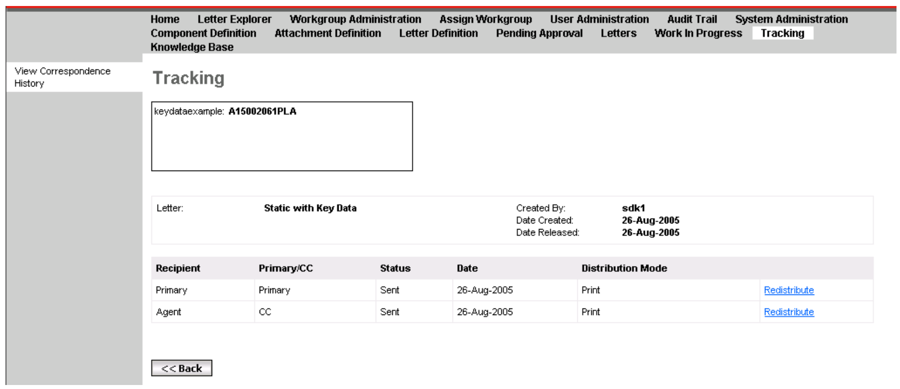


The **Tracking** page may not display all the letters. If so, a message indicates the number of records not displayed. If the letter you are searching for does not appear, you can search for it. For more information, see *Searching for Letters* on page 98.

Viewing Details of a Letter in the Tracking Page

To view the details of a letter in the Tracking page

1. In the **Tracking** page, click the letter to view its details.



The **Tracking** page shows details about the letter you selected:

- the key data – a unique identifier for the letter, for example, a policy number
- **Letter** – the name of the letter definition
- **Created by** – the user who generated the letter
- **Created on** – the date that the user created the letter
- **Date Released** – the date the letter was released
- **Recipient** – the recipient type
- **CC/Primary** – whether the recipient is carbon copy or primary recipient
- **Status** – the currents status of the letter for each recipient
- **Date** – the date associated with the action in the status column
- **Distribution Mode** – the distribution modes used for each recipient

2. For letters that are **Ready for Distribution** or **Pending Delivery**, **Recall** and **Delete** buttons appear:

- click **Recall** to open the **Recall Memo** window and type a brief reason for recalling the letter, then click **Continue** to return to the Tracking page
- click **Delete** to delete the letter and return to the **Tracking** page

3. Click **Back** to return to the **Tracking** page.

Redistributing a Letter

You can redistribute a letter that has already been distributed or has failed to be distributed to a recipient.

In the **Tracking** page, letters that have already been distributed appear with a **Status** of **Distributed**. Letters that have failed to be distributed appear with a **Status** of **Failed**.

Example: If a letter gets lost in the mail, the primary recipient might receive the letter but a carbon copy recipient might not receive it. You can redistribute the letter only to the carbon copy recipient.

Please note:

- Redistributing a letter means sending exactly the same information with the same delivery options, to a single recipient. If you need to generate or deliver the letter differently in any way, do not redistribute the letter. Instead, complete the steps in *Generating a Letter* on page 78.
- When you redistribute a letter, the letter stays in a *Distributed* state and is not archived. This allows the letter to be redistributed later to any of the other recipients.
- The following procedure describes how to redistribute a letter to a *single* recipient. If you need to redistribute a letter to a *group* of recipients, complete the steps in *Resubmitting Failed Mass Distributions* on page 126.
- You cannot redistribute a letter unless you have a valid user ID for generating letters, or a valid Reviewer user ID. Your Communicator Administrator can provide more information about user IDs.

To redistribute a letter

1. In the **Tracking** page, you can search for letters to redistribute: see *Searching for Letters* on page 98.
2. Select the **Distributed** or **Failed** letter to be redistributed.

   The **Tracking** details of the letter you selected are displayed: for details, see *To view the details of a letter in the Tracking page* on page 93.
3. Click the **Redistribute** link beside each recipient to receive the redistributed letter.

   The letter is redistributed.

Recalling a Letter

You can recall a letter only if it currently has a **Pending Delivery** or **Ready for Distribution** status after release or redistribution.

To recall a letter

1. In the **Tracking** page, you can search for letters to recall: see *Searching for Letters* on page 98.

2. Select the **Pending Delivery** or **Ready for Distribution** letter to recall.

   The **Tracking** details of the letter you selected are displayed: for details, see *To view the details of a letter in the Tracking page* on page 93.

3. Click **Recall**.

   The **Memo** window opens.

4. Enter a reason for the recall, then click **Continue**.

   The letter is now in **Pending Recall** status when Communicator does its regular distribution services processing.

Warning: If distribution has started for any recipient, you cannot recall or delete that letter.

Deleting a Letter

You can delete a letter if it currently has a **Pending Delivery** or **Ready for Distribution** status after release or redistribution.

(To delete letters in **Saved**, **Pending Approval, Recalled** and **Rejected** status, use the **Work In Progress** page: see *The Work in Progress Page* on page 87.)

To delete a letter

1. In the **Tracking** page, you can search for letters to delete: see *Searching for Letters* on page 98.

2. Select the **Pending Delivery** or **Ready for Distribution** letter to be deleted.

   The **Tracking** details of the letter you selected are displayed: for details, see *To view the details of a letter in the Tracking page*.

3. Click **Delete**.

   A confirmation message appears.

4. Click **OK** to delete the letter, or click **Cancel** to exit.

   The letter is deleted and in **Pending Cancel** status when Communicator does its regular distribution services processing.

Warning: If distribution has started for any recipient, you cannot delete the letter.

Viewing Knowledge Base Documents

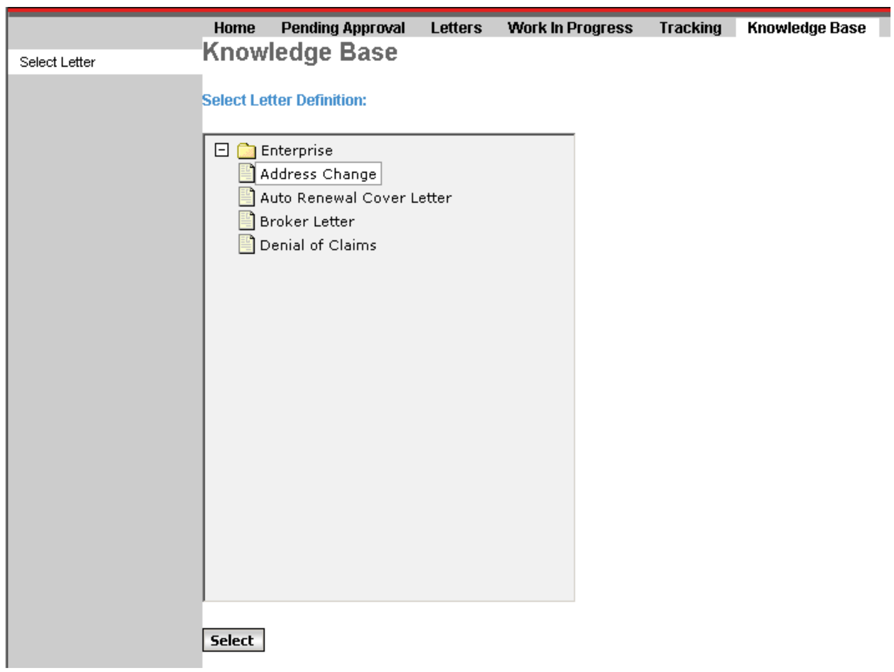
The Knowledge Base is a collection of procedural, reference or “best practices” documents that can help you generate a letter correctly.

You can click the Knowledge Base link to view Knowledge Base documents associated with any letter definition.

To select a letter definition and view its associated Knowledge Base documents

1. From the Communicator **Home** page, click **Knowledge Base**.

   The **Knowledge Base** page opens, showing a list of folders that contain letter definitions that you can access.



2. Browse to the letter definition for which to view Knowledge Base documents, then click **Select**.

   Links to any **Knowledge Base** documents associated with the letter definition version that is in effect appear in the right pane.

3. Click a Knowledge Base document.

   The Knowledge Base document opens in a new window.

To view Knowledge Base documents while generating a letter

1. While generating a letter, click the **Knowledge Base** icon (located beside the **Save** and **Exit** buttons).

   The **Knowledge Base** page opens in a new window, showing Knowledge Base documents associated with the version of the letter definition that you are using.

2. Click a Knowledge Base document.

The Knowledge Base document opens in a new window.

Related Topics

- *Generating a Letter* on page 78

Searching for Letters

In the **Pending Approval**, the **Work in Progress**, and the **Tracking** pages, you can click **Search** to search for letters according to very specific criteria.

Searching Letter Identifier Fields

Each key data variable is considered individually. The search process looks for records with the associated variable name and value that you enter in the search field.

When searching on letter identifier fields, which are made up of all of the key data fields, the fields may be treated as text if the field is only partially typed or if it is spelt incorrectly. The order in which you place a series of identifiers (such as key data variables) in your search criteria has no effect on the search results.

Example: If you have the following key data associations:

a=1, b=2, c=3, d=4

Your search results may show:

a=1, b=2, d=4, c=3

Any of the following search criteria will match the above record:

a=1

d=4, b=2

b=2, d=4

To search for letters

1. In the **Pending Approval**, the **Work in Progress** or the **Tracking** page, click **Show Search**.

   The appropriate **Search** criteria appear in the current page.

2. Enter any of the following criteria for your search:

   - To search for letters based on their status, in the **Work in Progress** or **Tracking** pages, select the status of the letter in the **Letter State** list.
   - To search for letters based on the **Letter Identifier** (keydata) field(s), select the letter's unique information in the **Letter Identifier** list, for example, a policy number or provider number.
   - To search for letters based on the dates they were created, select the date range during which the letters were created: click the selector buttons [...]. for the **Created From** and **To** field to enter the earliest date and latest dates on which the letters were created. (Click **Clear** to remove a date you have entered.)
   - To search for letters based on their definitions, select a letter definition from the **Letter Definition** drop-down list.

- To search for letters created by a specific user (if you are a reviewer), select the users that created the letter from the **User** list.

Tip: To select more than one value, press and hold the **Ctrl** key while selecting the values in the list.

3. Click **Find**.

Letters that meet your criteria are displayed.

Important: Your search criteria may have returned more letters than are currently displayed. To narrow your search, enter additional search criteria or change your search parameters.

To remove or change your search criteria

1. Click **Clear**.

The fields in the **Search** page are cleared.

2. If necessary, change any of your search criteria.

3. Click **Find**.

Communicator displays the letters that meet your new criteria.

Related Topics

- *The Work in Progress Page* on page 87
- *The Tracking Page* on page 91
- *Reviewer Role* on page 101

Chapter 5

Reviewer Role

Reviewers review letters for consistency and to ensure compliance with company standards. When a Reviewer approves a letter, it can then be sent to its recipients. If a Reviewer rejects a letter, it is returned to the User to correct and resubmit, with a reason for the rejection.

This chapter includes information about:

Note: Reviewers can also perform User tasks, but Users cannot perform Reviewer tasks.

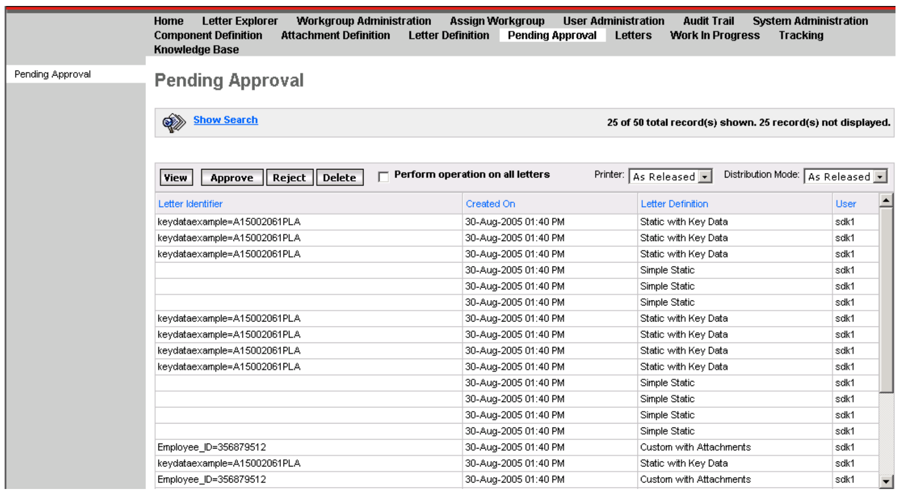
The Pending Approval Page

Reviewers most commonly work in the **Pending Approval** page. The **Pending Approval** page shows any generated letters that are awaiting approval before being released and distributed to recipients.

To open the Pending Approval page

- From the Communicator **Home** page, click **Pending Approval**.

  The **Pending Approval** page opens.



Note: You can only open the **Pending Approval** page if you have a valid Reviewer user ID. Your Communicator Administrator can provide more information about obtaining a valid user ID.

You can perform the following tasks in the **Pending Approval** page:

- *Viewing a Pending Approval Letter* on page 104
- *Approving Pending Approval Letters* on page 106
- *Rejecting Pending Approval Letters* on page 108
- *Deleting Pending Approval Letters* on page 109

Tip: In the **Pending Approval** page, you can:

- click any column header to sort by values in that column
- approve, delete and reject many letters at once by selecting **Perform selected operation on all letters**

Contents of the Pending Approval Page

If you are a Reviewer for a workgroup, the **Pending Approval** page contains any letters generated by Users in that workgroup if:

- the User's profile indicates **Approval Required**
- the letter was generated from a letter definition that specifies **Reviewer Approval Required**

Note: The **Pending Approval** page may not display all of the pending approval letters. If so, a message indicates the number of records not displayed. If the letter you are searching for does not appear, you can search for it. For more information, see *Searching for Letters* on page 98.

Related Topics

- *The Pending Approval Page* on page 102
- *Approving Pending Approval Letters* on page 106
- *Rejecting Pending Approval Letters* on page 108
- *Deleting Pending Approval Letters* on page 109

Viewing a Pending Approval Letter

You can review a Pending Approval letter before approving or rejecting it.

To view a Pending Approval letter

1. In the **Pending Approval** page, you can select letters to view and work with.

Note: The **Pending Approval** page may not display all of the pending approval letters. If so, a message indicates the number of records not displayed. If the letter you are searching for does not appear, you can search for it. For more information, see *Searching for Letters* on page 98.

2. Click a letter to view to highlight it, then click **View**.

   The generated letter displays in a Microsoft Word window in the browser.

Note: The **Perform selected operation on all letters** check box does not apply to viewing letters.

3. At this point, you can:
   - change the letter's printer or distribution mode
   - approve this letter with or without changing it
   - reject the letter

   To change the letter's printer or distribution mode:

Your system administrator may have configured Communicator to allow you to select the printer for the letter and/or to change the distribution mode for the letter. If the **Printer** and **Distribution Mode** are displayed, then you can change one or both of these as follows:

To change the printer, select a printer from the **Printer Group** drop-down list. The default printer is **As Assigned**. This printer is determined by the letter definition, or a user, or a general system configuration setting. Your system administrator determines the printers that appear on this list.

To change the distribution mode, select a value from the **Distribution Mode** drop-down list: **Real time** will distribute the letter immediately if no review is required, or after the letter is approved; **Batch** will distribute the letter at a defined, system-configured time. The default value is **As Assigned** and is determined by the letter definition.

To approve this letter (whether or not you have made changes):

a. Click **Approve**. A confirmation dialog box opens.

b. Click **OK** to approve the letter or click **Cancel** to exit.

To reject this letter:

a. Click **Reject**. The **Memo** page opens in a new window.

b. Enter a brief reason for rejecting the letter.

c. Click **Continue** to reject the letter or click **Cancel** to exit.

Related Topics

- *The Pending Approval Page* on page 102
- *Approving Pending Approval Letters* on page 106
- *Rejecting Pending Approval Letters* on page 108
- *Deleting Pending Approval Letters* on page 109

Approving Pending Approval Letters

When you approve a Pending Approval letter, Communicator releases it for distribution according to the distribution options the User had selected when creating the letter.

To approve Pending Approval letters

1. In the **Pending Approval** page, you can search for letters to approve: see *Searching for Letters* on page 98.

   To view a letter before you approve it, see *Viewing a Pending Approval Letter* on page 104.

2. To approve only one letter, leave the **Perform selected operation on all letters** check box cleared.

   To approve *all* of the letters that match your search criteria, select the **Perform selected operation on all letters** check box.

Note: The **Pending Approval** page may not display all of the pending approval letters. If so, a message indicates the number of records not displayed. If the letter you are searching for does not appear, you can search for it. For more information, see *Searching for Letters* on page 98.

Your system administrator may have configured Communicator to allow you to select the printer for the letter and/or to change the distribution mode for the letter. If the **Printer** and **Distribution Mode** are displayed, then you can change one or both of these as follows:

To change the printer, select a printer from the **Printer Group** drop-down list. The default printer is **As Assigned**. This printer is determined by the letter definition, or a user, or a general system configuration setting. Your system administrator determines the printers that appear on this list.

To change the distribution mode, select a value from the **Distribution Mode** drop-down list: **Real time** will distribute the letter immediately if no review is required, or after the letter is approved; **Batch** will distribute the letter at a defined, system-configured time. The default value is **As Assigned** and is determined by the letter definition.

   If you have selected the **Perform selected operation on all letters** check box, these settings will be applied to the letters that match your search criteria.

3. If you are approving only one letter, click the letter to approve to highlight it.

4. Click **Approve**.

   If you approving only one letter, a confirmation message appears. Click **OK** to approve the letter.

   If you approving more than one letter, a confirmation message appears, indicating there may be more letters that will be approved that match your search criteria but which are not currently displayed.

5. Click **OK** to approve all the letters.

   The letters you approved are removed from the list and the letter status is updated in the **Tracking** page.

Related Topics

- *The Pending Approval Page* on page 102
- *Viewing a Pending Approval Letter* on page 104
- *Rejecting Pending Approval Letters* on page 108
- *Deleting Pending Approval Letters* on page 109

Rejecting Pending Approval Letters

To prevent one or more letters in the **Pending Approval** page from being released and distributed, you can reject the letters and attach a memo to the letters explaining why you rejected them.

To reject Pending Approval letters

1. In the **Pending Approval** page, you can search for letters to reject: see *Searching for Letters* on page 98.

   To view a letter before rejecting it, see *Viewing a Pending Approval Letter* on page 104.

2. To reject only one letter, leave the **Perform selected operation on all letters** check box cleared.

   To reject *all* of the letters that match your search criteria, select the **Perform selected operation on all letters** check box

Note: The **Pending Approval** page may not display all of the pending approval letters. If so, a message indicates the number of records not displayed. If the letter you are searching for does not appear, you can search for it. For more information, see *Searching for Letters* on page 98.

3. Click **Reject**.

   If you are rejecting more than one letter, a confirmation dialog opens, indicating there may be more letters that will be rejected that match your search criteria but which are not currently displayed. Click **OK** to continue.

4. The **Memo** page opens in a new window.
5. Enter a brief reason for rejecting the letters, then click **Continue**.

Note: If you have selected the **Perform selected operation on all letters** check box, this **Memo** will be applied to all letters that match your search criteria.

The **Memo** page closes, and the **Pending Approval** page is refreshed, with the letters you rejected removed from the list.

The user(s) who generated the letters will see the rejected letters and your memo in their **Work in Progress** page.

The letter status is updated in the **Tracking** page.

Related Topics

- *The Pending Approval Page* on page 102
- *Viewing a Pending Approval Letter* on page 104
- *Approving Pending Approval Letters* on page 106
- *Deleting Pending Approval Letters* on page 109

Deleting Pending Approval Letters

When you delete a Pending Approval letter, Communicator deletes the record from your **Pending Approval** page. The letter state is updated on the **Tracking** page.

To delete Pending Approval letters

1. In the **Pending Approval** page, you can search for letters to delete: see *Searching for Letters* on page 98.

To view a letter before you delete it, see *Viewing a Pending Approval Letter* on page 104.

2. To delete only one letter, leave the **Perform selected operation on all letters** check box cleared. Click the letter to delete to highlight it.

To delete *all* the letters that your search criteria, select the **Perform selected operation on all letters** check box.

Note: The **Pending Approval** page may not display all of the pending approval letters. If so, a message indicates the number of records not displayed. If the letter you are searching for does not appear, you can search for it. For more information, see *Searching for Letters* on page 98.

3. Click **Delete**.

A confirmation message appears.

If you are deleting more than one letter, the message indicates there may be more letters that will be deleted that match your search criteria but which are not currently displayed.

4. Click **OK** to delete the letters, or click **Cancel** to exit.

The letter(s) you deleted are removed from the list.

Related Topics

- *The Pending Approval Page* on page 102
- *Viewing a Pending Approval Letter* on page 104
- *Approving Pending Approval Letters* on page 106
- *Rejecting Pending Approval Letters* on page 108

Chapter 6

The Administrator Role

Administrators can control an organization's access to Communicator and how letter definitions are saved. They can also reload configuration settings.

This chapter includes information about:

Note: You cannot log in as an Administrator unless you have a valid Administrator user ID.

Understanding Workgroups

In Communicator, a workgroup represents a department or any other logical group in your organization.

A workgroup has two important characteristics:

- its **user profiles** – these determine who can log in to Communicator and what features they can use
- the **letter definitions** assigned to it – these determine the types of letters a User in the workgroup can use

Users and Reviewers are assigned by an Administrator to a workgroup.

The following topics in this section provide an overview of how workgroups, user profiles and letter definitions work in Communicator:

- *User Profiles and Workgroups* on page 112
- *Letter Definitions and Workgroups* on page 114

Warning: If you do not assign a User to any workgroups that have letter definitions assigned to them, the User will still see folders, but they will appear empty. See *Assigning a Letter Definition to a Workgroup* on page 116 and *Managing User Profiles* on page 117.

Related Topics

- *Managing Workgroups* on page 115
- *Assigning a Letter Definition to a Workgroup* on page 116
- *Managing User Profiles* on page 117

User Profiles and Workgroups

A user profile lists which workgroups the Communicator user is a part of, and what role they play in each workgroup. The roles are:

- User
- Reviewer
- Contributor
- Administrator

Users

If a User's profile indicates that they are a User for any workgroup, the following options appear in the Communicator **Home** page:

- **Letters**
- **Work in Progress**
- **Tracking**
- **Knowledge Base**

A User can be a part of several workgroups.

Reviewers

If a User's profile indicates that they are a Reviewer for any workgroup, the User sees the same options as other Users see, and also sees a **Pending Approval** option in the Communicator **Home** page.

A Reviewer can be a part of several workgroups.

Contributors and Contributor Group

If a User's profile indicates that they are a Contributor, the following options appear in the Communicator **Home** page:

- **Component Definition**
- **Attachment Definition**
- **Letter Definition**

You cannot make a Contributor part of any particular workgroup. You can only add a Contributor to the Contributor Group. There is only one Contributor Group and you cannot create or add other Contributor Groups.

Administrator and Administrator Group

If a User's profile indicates that they are an Administrator, the following options appear in the Communicator **Home** page:

- **Letter Explorer**
- **Workgroup Administration**
- **User Administration**
- **System Administration**
- **Assign Workgroup**
- **Audit Trail**

You cannot make an Administrator part of any particular workgroup. You can only add an Administrator to the Administrator Group. There is only one Administrator Group and you cannot create or add other Administrator Groups.

Related Topics

- *Letter Definitions and Workgroups* on page 114
- *Managing User Profiles* on page 117

Letter Definitions and Workgroups

In the **Assign Workgroup** page, you can build the list of workgroups to which each letter definition is assigned.

When you assign a letter definition to a workgroup, any User or Reviewer in that workgroup can generate a letter with that letter definition.

You can assign any number of workgroups to a letter definition. A workgroup can have as many different letter definitions as required.

Related Topics

- *User Profiles and Workgroups* on page 112
- *Managing User Profiles* on page 117
- *Assigning a Letter Definition to a Workgroup* on page 116

Managing Workgroups

In the **Workgroup Administration** page, you can add, modify or delete a workgroup, including the roles that you can give a user profile in the workgroup.

To add or modify a workgroup

1. From the Communicator **Home** page, select **Workgroup Administration**.

   The **Workgroup Administration** page opens.

2. Select **Create New Workgroup**, or select **Modify Existing Workgroup** and the workgroup to modify.

3. Click **Select**, then complete the following fields:

   - **Workgroup Name** – this name displays in the workgroups drop-down list used when assigning user profiles and letter definitions to workgroups
   - a **Description** of the workgroup

Note: A workgroup is automatically assigned the User and Reviewer roles.

4. Click **Create** or **Modify**.

To delete a workgroup

Note: You must remove any current Users or letter definitions assigned to the workgroup before you can delete it.

1. From the **Workgroup Administration** page, click **Delete Existing Workgroup.**
2. From the drop-down list that opens, select the workgroup to delete, then click **Select**.
3. In the **Confirm Workgroup Deletion** page, ensure that this is the workgroup to be deleted
4. Click **OK** to delete this workgroup, or click **Cancel** to exit.

Related Topics

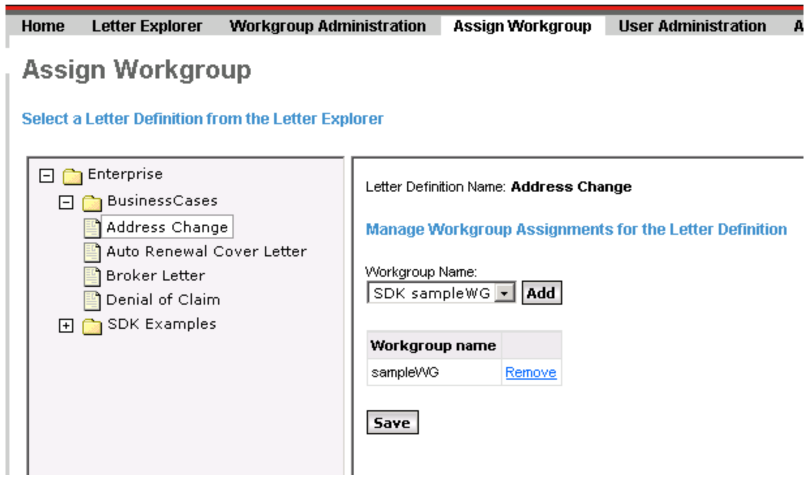
- *Understanding Workgroups* on page 112
- *Assigning a Letter Definition to a Workgroup* on page 116
- *Managing User Profiles* on page 117

Assigning a Letter Definition to a Workgroup

To assign a letter definition to a workgroup

1. From the Communicator **Home** page, select **Assign Workgroup**.

The **Assign Workgroup** page opens.



2. Select the letter definition to assign to a workgroup.

3. Select a **Workgroup Name** from the drop-down list, then click **Add** to add this workgroup to the list.

4. Continue to select other available workgroup(s) from the list to build a list of workgroups that can use this letter definition.

5. Click **Save**.

Communicator assigns the letter definition to the workgroups you selected.

Related Topics

- *Understanding Workgroups* on page 112

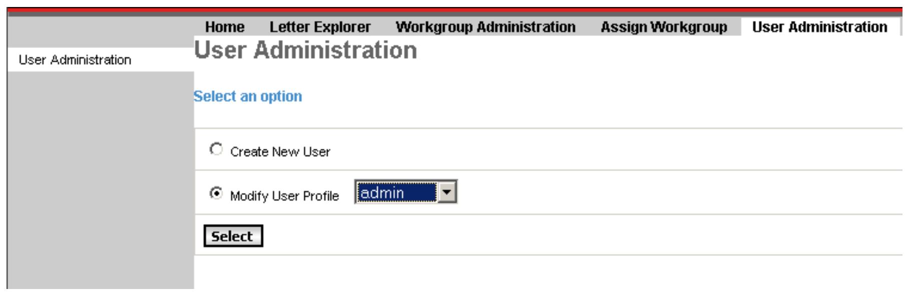
Managing User Profiles

Note: Once a user profile is created, you cannot delete it; you can only enable or disable it.

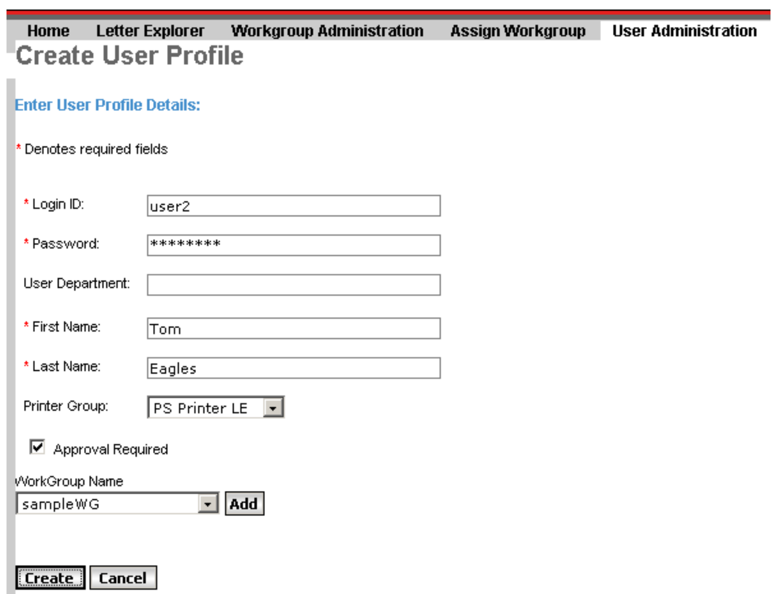
To add a user profile

1. From the Communicator **Home** page, select **User Administration**.

   The **User Administration** page opens.



2. Select **Create New User**, then click **Select**.
3. The **Create User Profile** page opens



4. Complete the following fields:
   - **Login ID** – Enter a unique string that this user can enter to log in to Communicator.

     The login ID can contain only letters and numbers, and no special characters. Contact your Communicator Administrator for further details.
   - **Password** – Enter a unique string that this user can enter as a password when logging in to Communicator.

The password can contain only letters and numbers, and no special characters. Contact your Communicator Administrator for further details.

- **User Department** – the name of the department to which this user belongs
- the full **First Name** and **Last Name** of this user
- **Printer Group** – The printer that will be used to print this User's generated letters when Print is selected for distribution. (optional)

Note: If no printer is selected, the system default printer specified during the setup of Communicator will be used. However, this can be changed to the printer specified in a letter definition or when generating a letter.

5. If you want each letter that this user generates to be reviewed before being released for distribution, select the **Approval Required** check box.

6. Select the **WorkGroup Name** of the workgroup that the User will be assigned to. Use **Add** and **Remove** to build the list of workgroups in which this user profile has a role.

For each workgroup you add, select the user's role in the workgroup from the drop-down list:

- **User**
- **Reviewer**
- **Contributor** – this role can belong only to the default Contributor workgroup
- **Administrator** – this role can belong only to the default Administrator workgroup

7. Click **Create**.

The user is created and you are returned to the **User Administration** page.

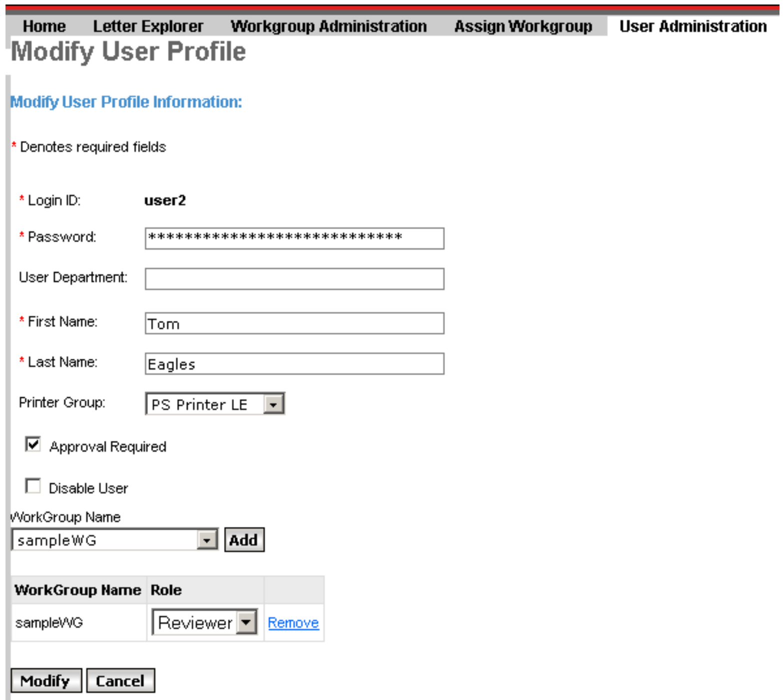
Related Topics

- *Reviewer Role* on page 101

Modifying a User Profile

1. From the **User Administration** page, select **Modify User Profile**.

The **Modify User Profile** page opens.



2. From the drop-down list, select a user profile to modify, then click **Select**.

3. You can modify the following fields:

- **Password** – Enter a unique string that this user can enter as a password when logging in to Communicator.

  The password can contain only letters and numbers, and no special characters. Contact your Communicator Administrator for further details.

- **User Department** – the name of the department to which this user belongs
- the full **First Name** and **Last Name** of this user
- **Printer Group** – The printer that will be used to print this User’s generated letters when Print is selected for distribution. (optional)

Note: If no printer is selected, the system default printer specified during the setup of Communicator will be used. However, this can be changed to the printer specified in a letter definition or when generating a letter.

4. If you want each letter that this user generates to be reviewed before being released for distribution, select the **Approval Required** check box.

5. Select the **WorkGroup Name** of the workgroup that the User will be assigned to. Use **Add** and **Remove** to build the list of workgroups in which this user profile has a role.

   For each workgroup you add, select the user's role in the workgroup from the drop-down list:

   - **User**
   - **Reviewer**
   - **Contributor** – this role can belong only to the default Contributor workgroup
   - **Administrator** – this role can belong only to the default Administrator workgroup

6. Click **Modify**.

   Your changes are saved.

Related Topics

- *Reviewer Role* on page 101
- *Understanding Workgroups* on page 112

To disable a user profile

If you disable a user profile in a workgroup, you will not be able to access letters that they generated in Work in Progress, Pending Approval, or Tracking as a member of that workgroup. Therefore, you should ensure that all the letters the user was working on are completed before disabling their profile.

Note: You can only enable or disable a user profile; you cannot delete a user profile.

1. In the Communicator **Home** page, select **User Administration**.

   The **User Administration** page opens.

2. Select **Modify User Profile**.
3. From the drop-down list, select the user profile to modify, then click **Select**.

   The **Modify User Profile** page opens, showing the user profile you selected.

4. Select the **Disable User** check box. A check mark in this box indicates that the profile is disabled.
5. Click **Modify**.

   Communicator disables the user profile, and the **User Administration** page opens.

   The user should now be unable to log in.

To enable a disabled user profile

Note: You can only enable or disable a user profile; you cannot delete a user profile.

1. In the Communicator **Home** page, select **User Administration**.

   The **User Administration** page opens.

2. From the drop-down list, select a user profile to modify, then click **Select**.

   The **Modify User Profile** page opens, showing the user profile you selected.

3. Click to remove the check mark in the **Disable User** check box. A check mark in this box indicates that the profile is disabled.

4. Click **Modify**.

   Communicator enables the user profile, and the **User Administration** page opens.

Related Topics

- *User Profiles and Workgroups* on page 112

Managing Folders in the Letter Explorer

When performing any task that involves a letter definition, users must select the letter definition from the **Letter Explorer**. The **Letter Explorer** is a set of folders containing all the letter definitions that the user can access.

From the **Letter Explorer** page, you can add, rename, delete or move a folder.

To add a folder

1. Select the folder in **Letter Explorer** to add the new folder to.
2. Click **Add Folder**.
3. Enter the name of the new folder.
4. Click **Save** to save the new folder.

To rename a folder

1. Select the folder to rename.
2. Click **Rename Folder**.
3. Enter the new name for the folder.
4. Click **Save** to save the new name for the folder.

To move a folder

1. Select the folder to move.
2. Click **Move Folder**.
3. Select the location to move the folder to.
4. Click **Save** to save the folder in the new location.

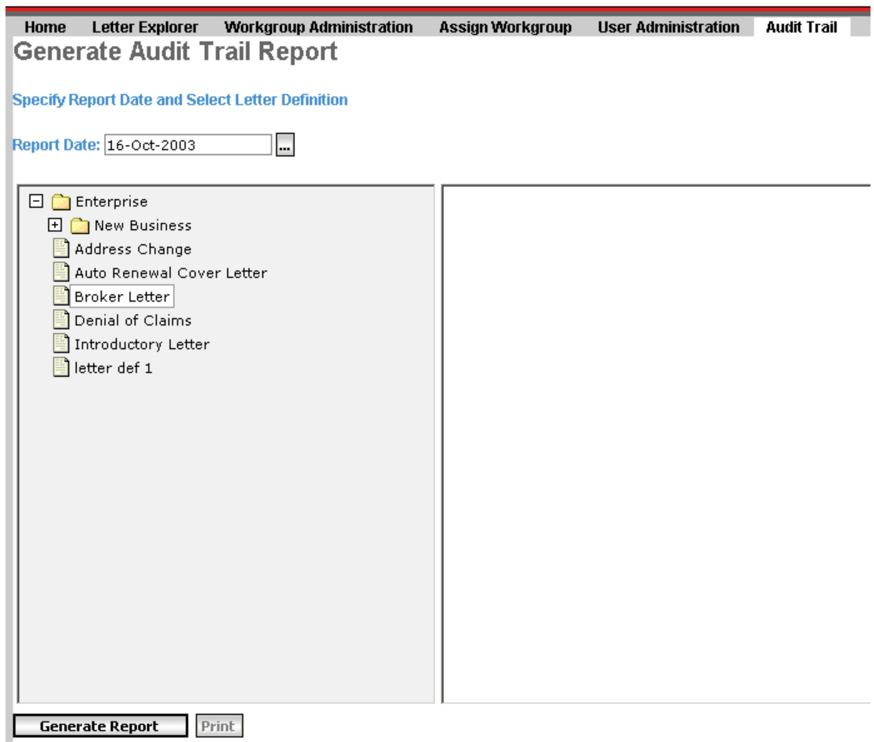
To delete a folder

Note: You can only delete an empty folder.

1. Select the empty folder to delete.
2. Click **Delete Folder.**
3. Click **Confirm** to delete the folder, or click **Cancel** to exit.

Generating Audit Trail Reports

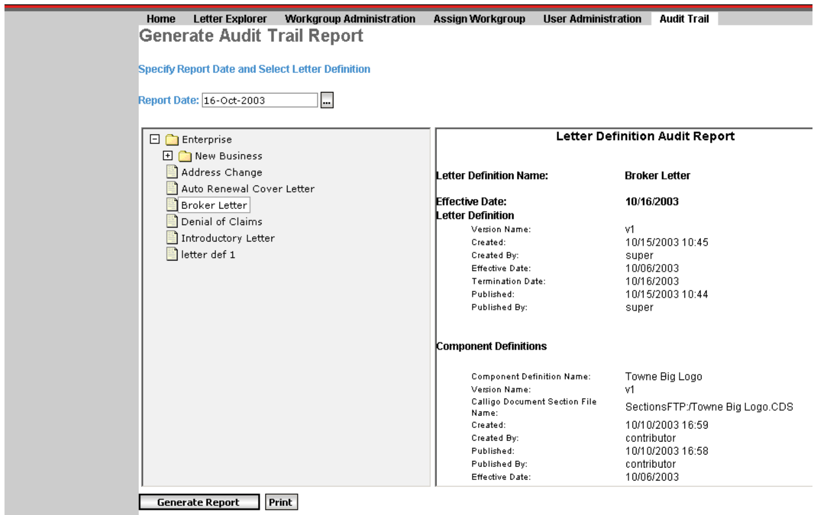
Administrators can generate a report that provides a complete history of the components (component and attachment definitions and their versions) that a letter definition referenced on a specific past date.



To generate an Audit Trail Report

1. From the Communicator **Home** page, select **Audit Trail**.
2. In the **Generate Audit Trail Report** page, click the button beside the **Report Date** field to choose a report date.
3. Select a letter definition on which to report, then click **Generate Report**.

   The **Audit Trail Report** opens in the right pane on page.



4. To print the report, click **Print**.

Reloading Configuration Settings

Administrators can reload changes to Communicator system settings or the data dictionary without having to stop and restart the system.

Important: Reloading the data dictionary only reloads the changes made to `datadict.xml`. If you make changes to the custom handler jar files, reloading the data dictionary will not reflect these changes. You will need to stop and restart the Communicator application server to reload the custom handler jar files.

To reload configuration settings

1. In the Communicator **Home** page, click **System Administration**.
2. In the **Configuration** section, select the **Configuration Type** to reload:
   - **Data Dictionary** – reloads the `DataDict.xml` file
   - **System Settings** – reloads the `CorrConfig.xml` file
3. Click **Reload**.

   A confirmation page appears indicating the reload has been successfully completed.
4. Click **Continue** to return to the **System Administration** page, or click **Exit** to return to the **Home** page.

Administrators can reload changes to Communicator system settings or the data dictionary without having to stop and restart the system.

Resubmitting Failed Mass Distributions

Administrators can resubmit groups of letters that failed to be distributed.

Note: The following procedure describes how to redistribute a letter to a *group* of recipients. If you need to redistribute a letter to a *single* recipient, complete the steps in *Redistributing a Letter* on page 94.

To resubmit failed mass distributions

1. In the Communicator **Home** page, click **System Administration**.
2. In the **Failed Letters Redistribution** section, do one or both of the following steps to select the failed letters to redistribute:
   - select the range of failure dates by clicking the date selector buttons [...]. next to the **From** and **To** fields
   - select one or more workgroups from the workgroup list: to select more than one workgroup, hold the **Ctrl** key while clicking the workgroup names
3. Click **Resubmit**.

   The letters are resubmitted. After they are successfully redistributed, those that are marked to be archived will be stored in the permanent retention repository.
4. Click **Continue** to return to the **System Administration** page, or click **Exit** to return to the **Home** page.

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