



SUNGARD SCT HIGHER EDUCATION

SCT Banner Advancement Letter Generation Training Workbook

January 2005

Release 7.0

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Section A: Introduction

Lesson: Overview

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Workbook goal

The goal of this workbook is to provide you with the knowledge and practice to use SCT Banner's Letter Generation process to create correspondence to your constituents. This workbook is divided into four sections:

- Introduction
- Set Up
- Day-to-Day Operations
- Reference

Intended audience

Advancement Office Staff

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Section A: Introduction

Lesson: Process Introduction

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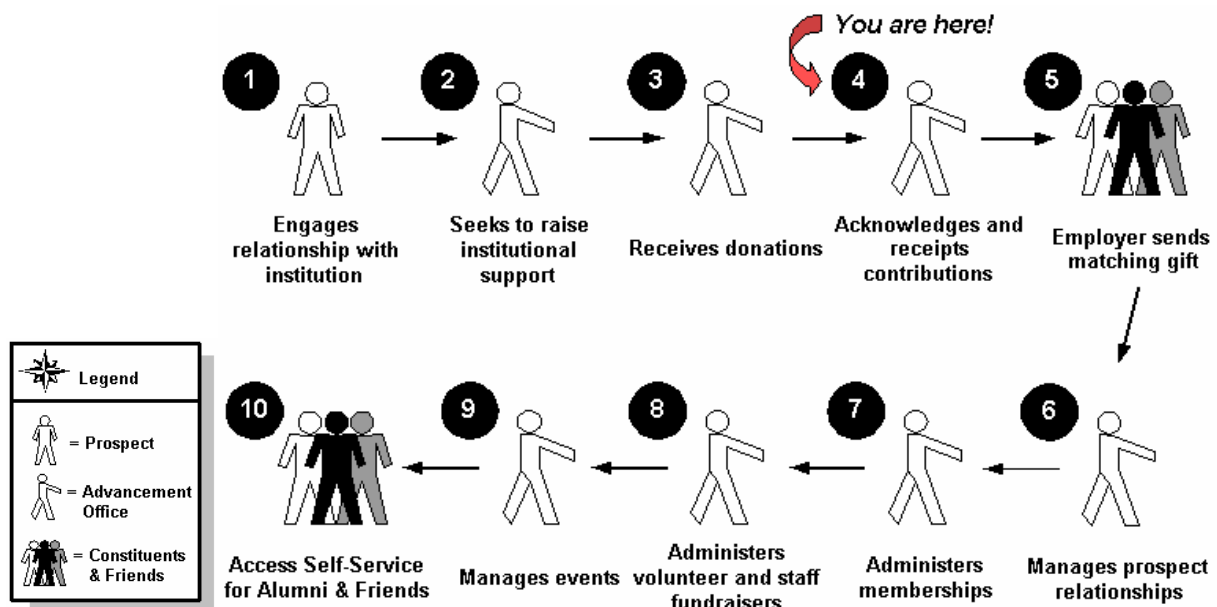
Introduction

Advancement Letter Generation demonstrates how to generate a letter for a particular population by extracting Banner data using Population Selection or Pending Mail.

This data can be exported to an external file which can later be retrieved and inserted into the “mail merge” function in Word or WordPerfect or be generated from within Banner itself. Banner generated letters will be referred to as “printed” letters. Exported letters will be known as “downloaded” letters.

Flow diagram

This diagram highlights the processes used within the SCT Banner Advancement System.



About the process

This process is initiated when an institution has a need to create form letters to send out to their constituents.



Section A: Introduction

Lesson: Terminology

◀ [Jump to TOC](#)

Application

All variables from any letter must be from the application, which is a storage unit for all related information.

Formatting commands

Formatting commands include the appearance of the letter such as margins, tabs, underlines and centers. These are not necessary if you are using word processing software to produce your final product.

Letter

A letter can contain a single paragraph (for downloading for word processing) or a series of paragraphs (for printing a letter via SCT Banner).

Letter code

A letter code identifies the name and description of the letter.

Paragraph

Paragraphs within SCT Banner contain text, variables, and formatting commands. If the letter is to be downloaded (exported) to MS Word or WordPerfect, then it will only contain variables.

Paragraph code

Paragraph Code identifies the name and description of the paragraph.

Text

Boilerplate text that surrounds the variables and is formatted via formatting commands (not used when downloading the letter).

Variable

Lines of SQL code which are rules for extracting the information that you need.



Section B: Set Up

Lesson: Overview

◀ [Jump to TOC](#)

Introduction

The purpose of this section is to outline the set-up process and detail the procedures to set-up your Banner system to utilize the letter generation process.

Intended audience

Advancement Office staff.

Objectives

At the end of this section, you will be able to

- create a letter code
- create a paragraph code
- define rules for variables
- link variables to a paragraph
- link a paragraph to a letter
- copy the rules from an existing variable to a new one.

Prerequisites

To complete this workbook, you should have completed the SCT Education Practices computer-based training (CBT) tutorial “SCT Banner 7 Fundamentals” or have equivalent experience navigating in the SCT Banner system.

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Section B: Set Up

Lesson: Creating a Letter Code

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Introduction

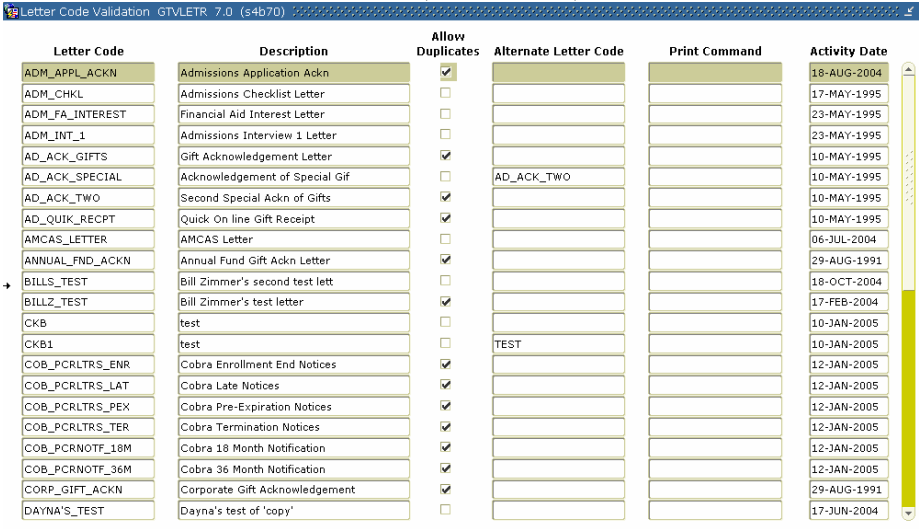
A code needs to be established on GTVLETR to represent the correspondence you are sending. The Letter Generation process updates the correspondence log for each recipient by inserting this code on AUAMAIL.

The first step is to create the text of the letter in the software (Microsoft Word or WordPerfect) that you will be using for the mail merge. Next, access GTVLETR in SCT Banner and create a letter code.

Note: Letter Generation can be used by all Banner systems. Use a naming convention (such as ADV, for example) to easily identify letters tied to the Advancement Office.

How to complete

Follow these steps to complete the form.

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2	Scroll down to view the list of values in the Letter Code field to ensure that the letter code you intend to create does not already exist.																																																																																																																																										
3	Perform an Insert Record function.																																																																																																																																										
4	Enter a code for your letter in the Letter Code field.																																																																																																																																										
	<u>Note:</u> There must be an underscore between the parts if the code is more than one word.																																																																																																																																										
5	Enter a description for your letter in the Description field.																																																																																																																																										



Section B: Set Up

Lesson: Creating a Letter Code (Continued)

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How to complete, continued

Step	Action
6	Check the Allow Duplicates checkbox, unless duplicates are not allowed. <u>Note:</u> Most likely, you will vary the text of the letter in your word processing program.
7	Enter an alternate letter code for letter codes that do not allow duplicates in the Alternate Letter Code field.
8	The Activity Date field will default.
9	Click the Save icon.
10	Click the Exit icon.



Section B: Set Up

Lesson: Creating a Paragraph Code

◀ [Jump to TOC](#)

Introduction

The Paragraph Code Validation Form (GTVPARA) is used to define codes that identify the paragraphs used in SCT Banner letters. Paragraph codes can be assigned to letters on the Letter Process Form (GUALETR).

Note: Letter Generation can be used by all Banner systems. Use a naming convention (such as ADV, for example) to easily identify paragraphs tied to the Advancement Office.

Letter example

Your office needs to send a letter to a certain group of constituents.

Your letter will look like this:

Note: The items with brackets will be the variable information selected from Banner to be used in the mail merge process.

<Prefix> <First Name> <Middle Name><Last Name>, <Suffix>
<Address Line 1>
<Address Line 2>
<Address Line 3>
<City>, <State> <Zip>

Date

Dear <Preferred Name>,
You are cordially invited to attend the Awards for Excellence Banquet to be held
September 10, 2003.
Please RSVP by August 10, 2003.

Sincerely,
Ms. Sue Doe



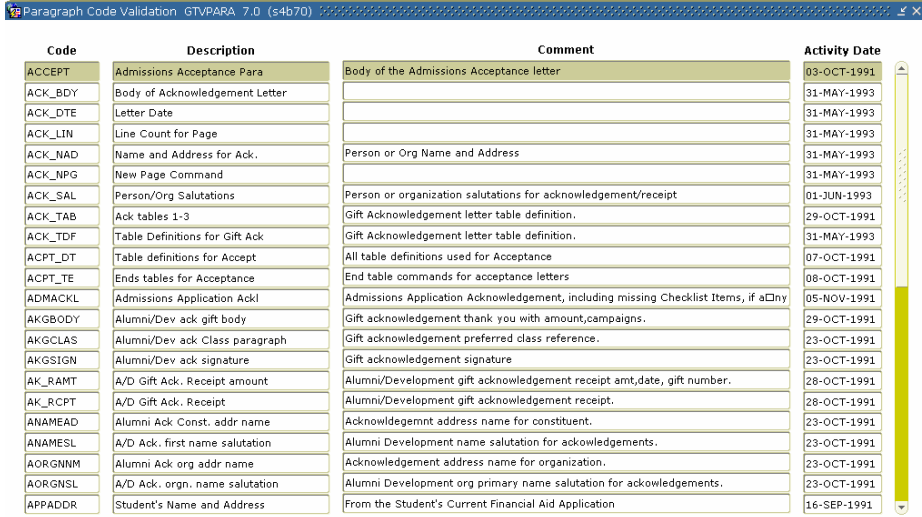
Section B: Set Up

Lesson: Creating a Paragraph Code (Continued)

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ACP_DT	Table definitions for Accept	All table definitions used for Acceptance	07-OCT-1991																																																																																										
ACPT_TE	Ends tables for Acceptance	End table commands for acceptance letters	08-OCT-1991																																																																																										
ADMACKL	Admissions Application Ackl	Admissions Application Acknowledgement, including missing Checklist Items, if a☐ny	05-NOV-1991																																																																																										
AKGBODY	Alumni/Dev ack gift body	Gift acknowledgement thank you with amount,campaigns.	29-OCT-1991																																																																																										
AKGCLAS	Alumni/Dev ack Class paragraph	Gift acknowledgement preferred class reference.	23-OCT-1991																																																																																										
AKGSSGN	Alumni/Dev ack signature	Gift acknowledgement signature	23-OCT-1991																																																																																										
AK_RAMT	A/D Gift Ack. Receipt amount	Alumni/Development gift acknowledgement receipt amt,date, gift number.	28-OCT-1991																																																																																										
AK_Rcpt	A/D Gift Ack. Receipt	Alumni/Development gift acknowledgement receipt.	28-OCT-1991																																																																																										
ANAMEAD	Alumni Ack Const. addr name	Acknowledgegmt address name for constituent.	23-OCT-1991																																																																																										
ANAMESL	A/D Ack. first name salutation	Alumni Development name salutation for acknowledgements.	23-OCT-1991																																																																																										
AORGNNM	Alumni Ack org addr name	Acknowledgement address name for organization.	23-OCT-1991																																																																																										
AORGNSL	A/D Ack. orgn. name salutation	Alumni Development org primary name salutation for acknowledgements.	23-OCT-1991																																																																																										
APPADDR	Student's Name and Address	From the Student's Current Financial Aid Application	16-SEP-1991																																																																																										
2	Perform a query in the Paragraph field to determine that the paragraph code you would like to create does not already exist.																																																																																												
3	If it does not exist, perform an Insert Record function to enter a new code.																																																																																												
4	Enter free form text that describes your paragraph in the Description field.																																																																																												
5	Enter free form text that describes your paragraph in the Comment field.																																																																																												
6	The Activity Date field will default.																																																																																												
7	Click the Save icon.																																																																																												
8	Click the Exit icon.																																																																																												



Section B: Set Up

Lesson: Define the Rules for Variables

◀ Jump to TOC

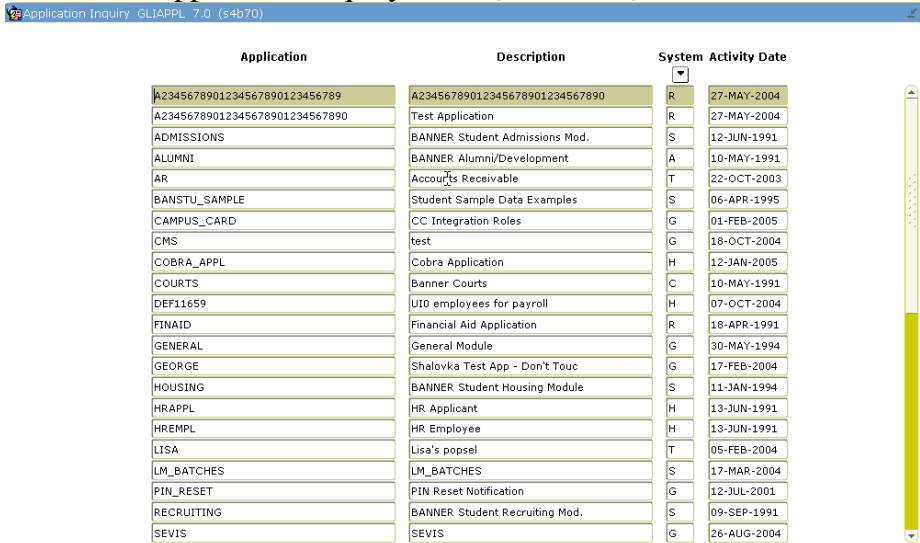
Introduction

Variables are pieces of data from your SCT Banner database that you use as data element inserts. Any data element associated with an ID can be defined as a variable. Each piece of information is stored in Oracle tables. To extract the information, you must identify what table and what piece of information from that table you need for the letters.

Example: PREFIX is stored in the table SPBPERS, and the name of the data element is SPBPERS_NAME_PREFIX. To find the name of the field, either use GURPDED (the data element dictionary which can be produced from Job Submission) or go to the data entry form where the field is located. Double-click the field or select Dynamic Help Query from the drop-down **Help** menu. A pop-up box appears displaying the name of the data element. The Oracle table is the first acronym in the data element.

How to complete

Follow these steps to complete the form.

Step	Action																																																																																												
1	<p>Access the Application Inquiry Form (GLIAPPL).</p>  <p>The screenshot shows the 'Application Inquiry' form with a table of applications. The table has columns for Application, Description, System, and Activity Date. The first row is highlighted in green.</p> <table border="1"> <thead> <tr> <th>Application</th> <th>Description</th> <th>System</th> <th>Activity Date</th> </tr> </thead> <tbody> <tr> <td>A2345678901234567890123456789</td> <td>A23456789012345678901234567890</td> <td>R</td> <td>27-MAY-2004</td> </tr> <tr> <td>A23456789012345678901234567890</td> <td>Test Application</td> <td>R</td> <td>27-MAY-2004</td> </tr> <tr> <td>ADMISSIONS</td> <td>BANNER Student Admissions Mod.</td> <td>S</td> <td>12-JUN-1991</td> </tr> <tr> <td>ALUMNI</td> <td>BANNER Alumni/Development</td> <td>A</td> <td>10-MAY-1991</td> </tr> <tr> <td>AR</td> <td>Accounts Receivable</td> <td>T</td> <td>22-OCT-2003</td> </tr> <tr> <td>BANSTU_SAMPLE</td> <td>Student Sample Data Examples</td> <td>S</td> <td>06-APR-1995</td> </tr> <tr> <td>CAMPUS_CARD</td> <td>CC Integration Roles</td> <td>G</td> <td>01-FEB-2005</td> </tr> <tr> <td>CMS</td> <td>test</td> <td>G</td> <td>18-OCT-2004</td> </tr> <tr> <td>COBRA_APPL</td> <td>Cobra Application</td> <td>H</td> <td>12-JAN-2005</td> </tr> <tr> <td>COURTS</td> <td>Banner Courts</td> <td>C</td> <td>10-MAY-1991</td> </tr> <tr> <td>DEF11659</td> <td>UI0 employees for payroll</td> <td>H</td> <td>07-OCT-2004</td> </tr> <tr> <td>FINAID</td> <td>Financial Aid Application</td> <td>R</td> <td>18-APR-1991</td> </tr> <tr> <td>GENERAL</td> <td>General Module</td> <td>G</td> <td>30-MAY-1994</td> </tr> <tr> <td>GEORGE</td> <td>Shalovka Test App - Don't Touc</td> <td>G</td> <td>17-FEB-2004</td> </tr> <tr> <td>HOUSING</td> <td>BANNER Student Housing Module</td> <td>S</td> <td>11-JAN-1994</td> </tr> <tr> <td>HRAPPL</td> <td>HR Applicant</td> <td>H</td> <td>13-JUN-1991</td> </tr> <tr> <td>HREMPL</td> <td>HR Employee</td> <td>H</td> <td>13-JUN-1991</td> </tr> <tr> <td>LISA</td> <td>Lisa's popsel</td> <td>T</td> <td>05-FEB-2004</td> </tr> <tr> <td>LM_BATCHES</td> <td>LM_BATCHES</td> <td>S</td> <td>17-MAR-2004</td> </tr> <tr> <td>PIN_RESET</td> <td>PIN Reset Notification</td> <td>G</td> <td>12-JUL-2001</td> </tr> <tr> <td>RECRUITING</td> <td>BANNER Student Recruiting Mod.</td> <td>S</td> <td>09-SEP-1991</td> </tr> <tr> <td>SEVIS</td> <td>SEVIS</td> <td>G</td> <td>26-AUG-2004</td> </tr> </tbody> </table> <p>Note: This lists all the applications that can use Letter Generation. Our variables will be associated with the application of Alumni.</p>	Application	Description	System	Activity Date	A2345678901234567890123456789	A23456789012345678901234567890	R	27-MAY-2004	A23456789012345678901234567890	Test Application	R	27-MAY-2004	ADMISSIONS	BANNER Student Admissions Mod.	S	12-JUN-1991	ALUMNI	BANNER Alumni/Development	A	10-MAY-1991	AR	Accounts Receivable	T	22-OCT-2003	BANSTU_SAMPLE	Student Sample Data Examples	S	06-APR-1995	CAMPUS_CARD	CC Integration Roles	G	01-FEB-2005	CMS	test	G	18-OCT-2004	COBRA_APPL	Cobra Application	H	12-JAN-2005	COURTS	Banner Courts	C	10-MAY-1991	DEF11659	UI0 employees for payroll	H	07-OCT-2004	FINAID	Financial Aid Application	R	18-APR-1991	GENERAL	General Module	G	30-MAY-1994	GEORGE	Shalovka Test App - Don't Touc	G	17-FEB-2004	HOUSING	BANNER Student Housing Module	S	11-JAN-1994	HRAPPL	HR Applicant	H	13-JUN-1991	HREMPL	HR Employee	H	13-JUN-1991	LISA	Lisa's popsel	T	05-FEB-2004	LM_BATCHES	LM_BATCHES	S	17-MAR-2004	PIN_RESET	PIN Reset Notification	G	12-JUL-2001	RECRUITING	BANNER Student Recruiting Mod.	S	09-SEP-1991	SEVIS	SEVIS	G	26-AUG-2004
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2	Review the list of applications already defined.																																																																																												



Section B: Set Up

Lesson: Application Rules Form

◀ Jump to TOC

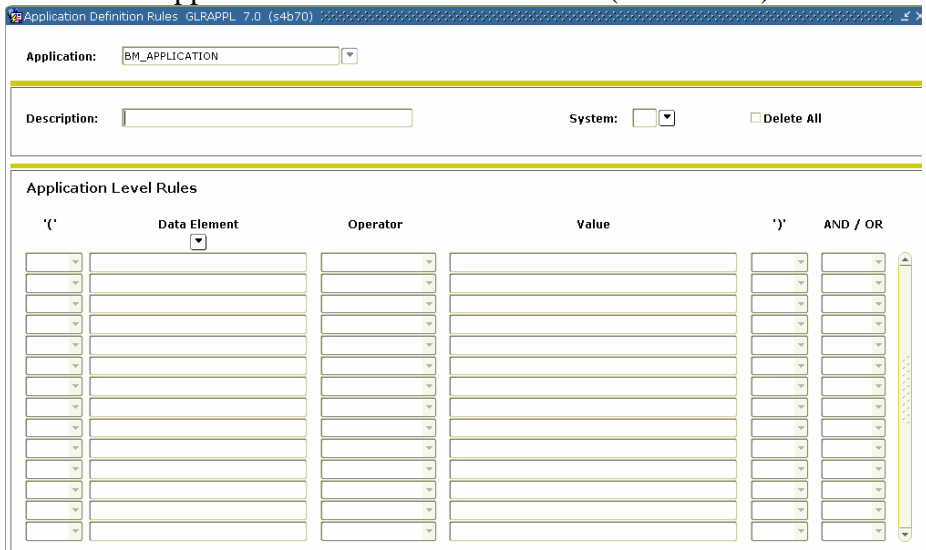
Introduction

Use this form to define and maintain an application that is unique for a user. An application is a functional area with similar characteristics that can be applied to population selections, populations, and variables. Once defined here, you can use this application for all your variables.

Note: This step is optional, because a unique application for a letter is not required. Most likely you will link all of your variables with the Alumni application. However, if you would like to separate Alumni variables and population selections from those ‘owned’ by Development or a specific staff person, follow the steps below.

How to complete

Follow these steps to complete the form.

Step	Action
1	<p>Access the Application Definition Rules Form (GLRAPPL).</p>  <p>On this form, you can create a unique application for yourself.</p>
2	<p>Enter <i>XXX_APPLICATION</i> in the Application field. (where <i>XXX</i> = your initials).</p> <p><u>Example:</u> James C. Quick would enter <i>JQ_APPLICATION</i>.</p>
3	<p>Enter a description of your application in the Description field.</p> <p><u>Example:</u> James Quick would enter <i>James Quick’s Application</i></p>



Section B: Set Up

Lesson: Application Rules Form (Continued)

◀ Jump to TOC

How to complete, continued

Step	Action												
4	In the System field, enter <i>A</i> , which is the code applicable to your system for this exercise: <table><tr><td><i>A</i></td><td>Advancement</td><td><i>F</i></td><td>Finance</td></tr><tr><td><i>G</i></td><td>General</td><td><i>H</i></td><td>Human Resources</td></tr><tr><td><i>R</i></td><td>Financial Aid</td><td><i>S</i></td><td>Student</td></tr></table>	<i>A</i>	Advancement	<i>F</i>	Finance	<i>G</i>	General	<i>H</i>	Human Resources	<i>R</i>	Financial Aid	<i>S</i>	Student
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<i>R</i>	Financial Aid	<i>S</i>	Student										
5	No rules need to be entered in the Application Level Rules block.												
6	Click the Save icon.												
7	Click the Exit icon.												



Section B: Set Up

Lesson: Variable Inquiry Form

◀ Jump to TOC

Introduction

Use this form to display a list of all variables defined on the Variable Rules Definition Form (GLRVRBL) for an application. A variable is a specific piece of data in the database and the set of rules used to select that data.

How to complete

Follow these steps to complete the form.

Step	Action																																																															
1	<p>Access the Variable Inquiry Form (GLIVRBL).</p> <table border="1"> <thead> <tr> <th>Variable</th> <th>Description</th> <th>Activity Date</th> </tr> </thead> <tbody> <tr> <td>*ACK_CITY_ST_ZIP</td> <td>Ack. Const.City, State & Zip</td> <td>01-NOV-1991</td> </tr> <tr> <td>*ACK_DEDUCT_VALUE</td> <td>Deductible Value from Gift</td> <td>25-APR-1994</td> </tr> <tr> <td>*ACK_DUMMY</td> <td>Always Null</td> <td>31-MAY-1993</td> </tr> <tr> <td>*ACK_FIRST_LAST_NAME</td> <td>Ack. First, Last Name</td> <td>10-JUN-1991</td> </tr> <tr> <td>*ACK_FIRST_NAME</td> <td>Ack. First Name</td> <td>14-OCT-1991</td> </tr> <tr> <td>*ACK_FIRST_TYPE</td> <td>First Type Variable</td> <td>01-JUN-1993</td> </tr> <tr> <td>*ACK_GIFT_AMT</td> <td>Gift amount being acknowledged</td> <td>30-JUL-1991</td> </tr> <tr> <td>*ACK_GIFT_CAMPAIGN</td> <td>Ack. Gift Date,No,Amt, Camp.</td> <td>30-OCT-1991</td> </tr> <tr> <td>*ACK_GIFT_CAMP_AMT</td> <td>Gift Ack. Campaign Amount</td> <td>30-JUL-1991</td> </tr> <tr> <td>*ACK_GIFT_CAMP_NO</td> <td>Camp Gift no being acknowl</td> <td>24-OCT-1991</td> </tr> <tr> <td>*ACK_GIFT_DATE</td> <td>Gift Date for Acknowledgement</td> <td>30-JUL-1991</td> </tr> <tr> <td>*ACK_GIFT_DESG</td> <td>Gift Ack. Designation</td> <td>22-OCT-1991</td> </tr> <tr> <td>*ACK_GIFT_INFORMATION</td> <td>Gift Date, Amount, Designation</td> <td>31-MAY-1993</td> </tr> <tr> <td>*ACK_GIFT_NO</td> <td>Gift no being acknowledged</td> <td>19-SEP-1991</td> </tr> <tr> <td>*ACK_GIFT_VALUE</td> <td>Full Gift Amount</td> <td>25-APR-1994</td> </tr> <tr> <td>*ACK_GIFT_VALUE_FORMATTED</td> <td>Formatted Full Gift Amount</td> <td>25-APR-1994</td> </tr> <tr> <td>*ACK_LAST_NAME</td> <td>Ack. Last Name</td> <td>23-OCT-1991</td> </tr> <tr> <td>*ACK_ORG_PRIMARY</td> <td>Org Prim Contact -First name</td> <td>23-OCT-1991</td> </tr> <tr> <td>*ACK_ORG_PRIMARY_ADDRESS</td> <td>Org Primary Contact Address</td> <td>01-JUN-1993</td> </tr> <tr> <td>*ACK_ORG_PRIMARY_NAME</td> <td>Org primary contact name</td> <td>01-JUN-1993</td> </tr> </tbody> </table>	Variable	Description	Activity Date	*ACK_CITY_ST_ZIP	Ack. Const.City, State & Zip	01-NOV-1991	*ACK_DEDUCT_VALUE	Deductible Value from Gift	25-APR-1994	*ACK_DUMMY	Always Null	31-MAY-1993	*ACK_FIRST_LAST_NAME	Ack. First, Last Name	10-JUN-1991	*ACK_FIRST_NAME	Ack. First Name	14-OCT-1991	*ACK_FIRST_TYPE	First Type Variable	01-JUN-1993	*ACK_GIFT_AMT	Gift amount being acknowledged	30-JUL-1991	*ACK_GIFT_CAMPAIGN	Ack. Gift Date,No,Amt, Camp.	30-OCT-1991	*ACK_GIFT_CAMP_AMT	Gift Ack. Campaign Amount	30-JUL-1991	*ACK_GIFT_CAMP_NO	Camp Gift no being acknowl	24-OCT-1991	*ACK_GIFT_DATE	Gift Date for Acknowledgement	30-JUL-1991	*ACK_GIFT_DESG	Gift Ack. Designation	22-OCT-1991	*ACK_GIFT_INFORMATION	Gift Date, Amount, Designation	31-MAY-1993	*ACK_GIFT_NO	Gift no being acknowledged	19-SEP-1991	*ACK_GIFT_VALUE	Full Gift Amount	25-APR-1994	*ACK_GIFT_VALUE_FORMATTED	Formatted Full Gift Amount	25-APR-1994	*ACK_LAST_NAME	Ack. Last Name	23-OCT-1991	*ACK_ORG_PRIMARY	Org Prim Contact -First name	23-OCT-1991	*ACK_ORG_PRIMARY_ADDRESS	Org Primary Contact Address	01-JUN-1993	*ACK_ORG_PRIMARY_NAME	Org primary contact name	01-JUN-1993
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2	<p>Enter the application you just created in the Application field.</p> <p><u>Note:</u> In this example, all the variables associated with the application of <i>Alumni</i> are displayed. These variables can be used and reused in any paragraph/letter combination.</p>																																																															
3	Click the Save icon.																																																															
4	Click the Exit icon.																																																															



Section B: Set Up

Lesson: Variable Rules Definition Form

◀ Jump to TOC

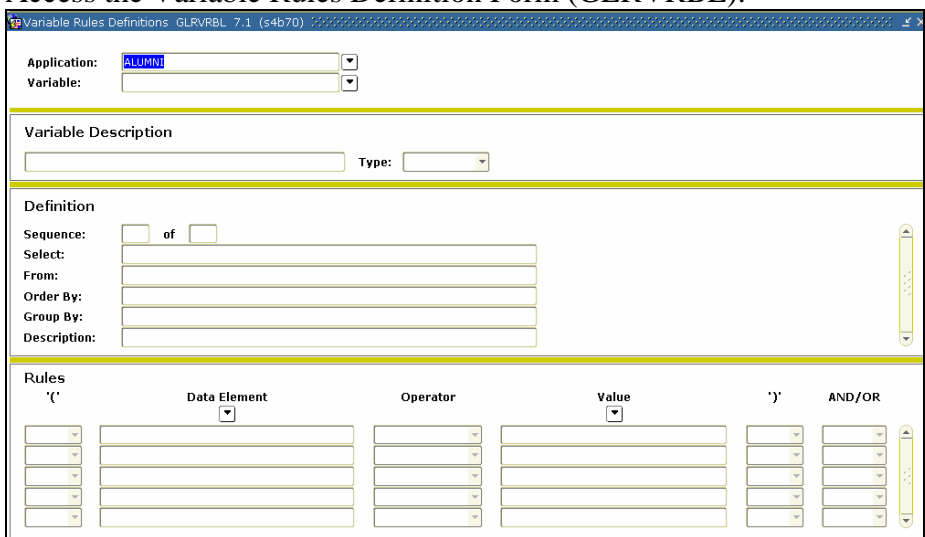
Introduction

The Variable Rules Definition Form (GLRVRBL) is used to define, maintain and copy an existing variable to modify it without changing the master copy. A variable is a specific piece of data in the database and the set of rules used to select that data.

Note: Since Letter Generation can be used by all Banner systems, there will be variables created by other systems. By using *Alumni* in the **Application** field, the variables displayed are only those created by and for the Advancement system

How to complete

Follow these steps to complete the form.

Step	Action
1	<p>Access the Variable Rules Definition Form (GLRVRBL).</p> 
2	<p>In the Application field, double-click to view the list of choices and double-click on <i>Alumni</i> to retrieve it.</p>
3	<p>Enter the name for your variable to create a new variable in the Variable field.</p> <p><u>Notes:</u></p> <ul style="list-style-type: none"> • Use a naming convention (such as ADV, for example) to easily identify variables that pertain to a specific letter or project. • The Search icon may be used to view a list of existing variables. • All variables must start with an asterisk (*).
4	<p>Enter a description for your variable in the Description field.</p>



Section B: Set Up

Lesson: Variable Rules Definition Form (Continued)

◀ Jump to TOC

How to complete, continued

Step	Action
5	<p>Select <i>First</i> in the Type field.</p> <p>Notes:</p> <ul style="list-style-type: none">• There must be a variable that is indicated as “First” in the Type field so that the letter extract process (GLBLSEL) can identify the variable it will process first to determine whether the ID should receive the letter.• The first processed variable must return only one value for an ID because it becomes the key used when extracting the values of the other variables. If the first variable returns more than one value for an ID, then all other variables in the letter will have that many values multiplied by the number of values it should have returned. If the first variable returns no value for an ID, then no other variable in the letter returns a value; therefore, the ID does not receive a letter. Since all Banner records must have a last name, use that as the selection criteria. Another good field to use is ID, since all Banner records must have an ID.
6	<p>Enter <i>SPRIDEN_LAST_NAME_</i> in the Select field.</p> <p><u>Note:</u> This is the last name column from the SPRIDEN table.</p>
7	<p>Enter <i>SPRIDEN</i> in the From field.</p>
8	<p>Enter a Data Element of <i>SPRIDEN_CHANGE_IND</i> and an Operator of <i>IS NULL</i> in the Rules section.</p> <p><u>Note:</u> This will select the most current version of the SPRIDEN name, since no change indicator flags will be attached. All alternate IDs and names have change indicator flags. N = name and I = ID.</p>



Section B: Set Up

Lesson: Variable Rules Definition Form (Continued)

◀ Jump to TOC

How to complete, continued

Step	Action
9	<p>Click the Save icon.</p> <p><u>Notes:</u></p> <ul style="list-style-type: none"> • The message “Performing Variable Compilation, please wait” will display. This step is being performed by the compiler (GLOLETT), which evaluates the syntax of the information you entered. If your variable is compiled successfully, the form will exit automatically. • If your variable does not compile successfully, an error message displays. Click OK to acknowledge the message. The Process Results Form (GJARSLT) displays the error that caused the compilation to terminate, along with any other previous error messages. Return to GLRVRBL and correct the variable information as needed. Click the Save icon to compile again.

Creating variables for other data elements

Using the steps above, create variables for the other data elements that you are using in your letter. Remember to save and exit the form after creating each variable so that your variables compile successfully.

Examples of variables

The following table details some variable examples.

Prefix	*ADV_PREFIX
First Name	*ADV_FNAM
Last Name	*ADV_LNAM
Suffix	*ADV_SUFFIX
Address Line 1	*ADV_ADD1
City	*ADV_CITY
State	*ADV_STATE
Zip	*ADV_ZIP
FIRST TYPE	*ADV_SPRIDEN_LAST_NAME (first type variable)



Section B: Set Up

Lesson: Using a View

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Introduction

A view or a logical view is a grouping of information that can be used to select data. It is called logical because the information is grouped in a logical order, putting related information in the same section. Information in a view comes from fields in Banner; some information may be calculated based on database fields or retrieved using an Oracle function.

A single view can include up to 255 pieces of information, called attributes. An attribute is a single piece of information within a view.

Example: SPVADDS is a view that selects address information.



Section B: Set Up

Lesson: Using a View (Continued)

◀ Jump to TOC

Selecting a variable example

To select the address information, use the view called SPVADDS.

```
SQL> desc spvadds
Name                               Null?      Type
-----
SPVADDS_PIDM                       NOT NULL   NUMBER(8)
SPVADDS_ID                          NOT NULL   VARCHAR2(9)
SPVADDS_LAST_NAME                   NOT NULL   VARCHAR2(60)
SPVADDS_FIRST_NAME                  VARCHAR2(15)
SPVADDS_MI                          VARCHAR2(15)
SPVADDS_ATYP_CODE                   NOT NULL   VARCHAR2(2)
SPVADDS_ATYP_DESC                   VARCHAR2(30)
SPVADDS_STREET_LINE1                VARCHAR2(30)
SPVADDS_STREET_LINE2                VARCHAR2(30)
SPVADDS_STREET_LINE3                VARCHAR2(30)
SPVADDS_CITY                        NOT NULL   VARCHAR2(20)
SPVADDS_STAT_CODE                   VARCHAR2(3)
SPVADDS_STAT_DESC                   VARCHAR2(30)
SPVADDS_ZIP                         VARCHAR2(10)
SPVADDS_CNTY_CODE                   VARCHAR2(5)
SPVADDS_CNTY_DESC                   VARCHAR2(30)
SPVADDS_NATN_CODE                   VARCHAR2(5)
SPVADDS_NATN_DESC                   VARCHAR2(30)
SPVADDS_SEQNO                       NOT NULL   NUMBER(2)
SPVADDS_DELIVERY_POINT              NUMBER(2)
SPVADDS_CORRECTION_DIGIT            NUMBER(1)
```

This view contains one address per ID, based on the address hierarchy entered for the address type parameters on GBLSEL. This means that every ID receiving the letter being processed needs to have an effective address with an address type that matches one of the address parameter values entered during processing. If it does, then the SPVADDS variable returns one value per ID and the other variables in the letter return the correct number of values. If the ID does not have an effective address with an address type that matches one of the address parameter values entered during processing, no value will be in the SPVADDS view for the ID. The SPVADDS variable returns no value, and the ID does not receive a letter.

Using a FIRST type variable allows you to specify an address not necessarily found in the SPVADDS view.

Example: If Advancement has a unique address type other than MA, PR, etc.



Section B: Set Up

Lesson: Copy the Rules from an Existing Variable to a New Variable

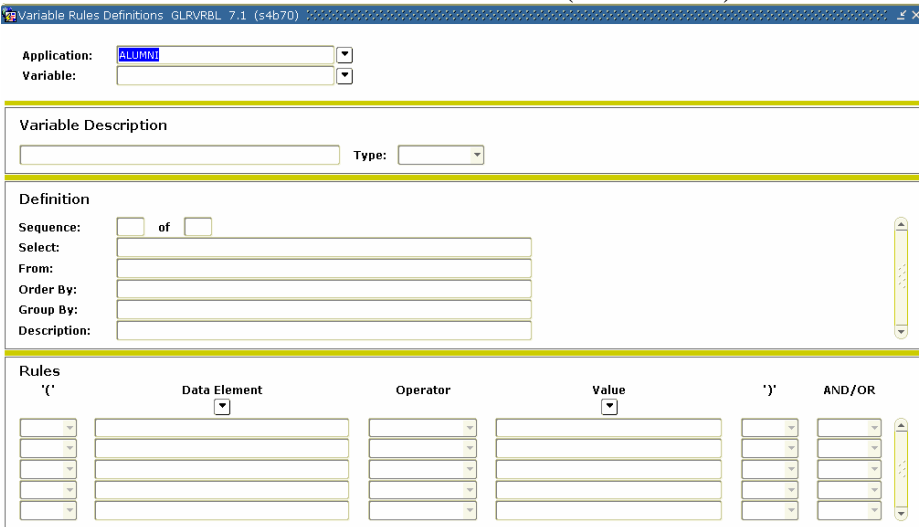
◀ Jump to TOC

Introduction

You determine that you need to have a second street line as part of your address. Since the variable for selecting street line 1 already exists, you can use the **Copy Variable** function, modify it to look for street line 2 and save and compile it.

How to complete

Follow these steps to complete the form.

Step	Action
1	<p>Access the Variable Rules Definition Form (GLRVRBL).</p>  <p>The screenshot shows the 'Variable Rules Definition Form (GLRVRBL)'. At the top, there is a browser window title 'Variable Rules Definitions: GLRVRBL 7.1 (s4b70)'. Below this, there are two dropdown menus: 'Application:' with 'ALUMM' selected and 'Variable:'. A horizontal line separates this from the 'Variable Description' section, which has a text input field and a 'Type:' dropdown. Another horizontal line separates this from the 'Definition' section, which includes 'Sequence:' with two input boxes and 'of', 'Select:', 'From:', 'Order By:', 'Group By:', and 'Description:' each with a text input field. A vertical scrollbar is on the right of the Definition section. Below this is the 'Rules' section, which is a table with columns: '(', 'Data Element', 'Operator', 'Value', ')', and 'AND/OR'. Each column has a dropdown menu. Below the table are four rows of input fields for each column, with a vertical scrollbar on the right.</p>
2	In the Application field, enter the code <i>Alumni</i> .
3	Review the list of variables defined within the application.

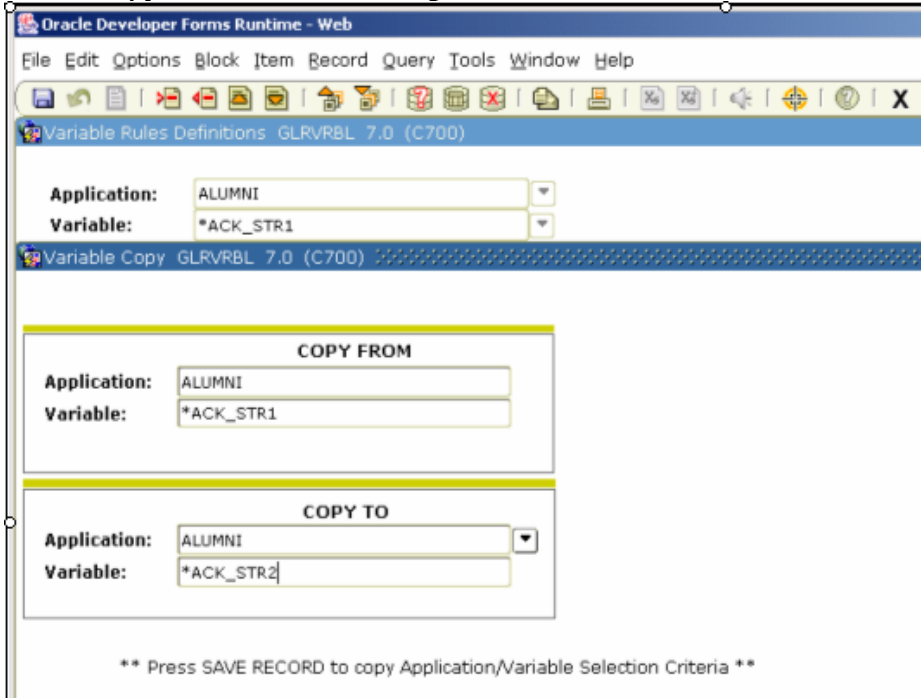


Section B: Set Up

Lesson: Copy the Rules from an Existing Variable to a New Variable (Continued)

◀ Jump to TOC

Procedure, continued

Step	Action
4	<p>Select Copy Variable from the Options menu.</p> 
5	Enter the application code you created, or select it from the List of Values in the Application field of the Copy To block,
6	Enter the new name that you want to call the variable (remember to put an asterisk at the beginning) in the Variable field.
7	Click the Save icon. <i>Note:</i> You will automatically return to the Variable Rules Definition Form (GLRVRBL).
8	Change the description, definition, or rules, if necessary.
9	Click the Save icon.
10	Click the Exit icon to compile.
11	Copy any variable you need that exists in other systems and modify it to meet your needs.



Section B: Set Up

Lesson: Create a Variable Using a Join

◀ Jump to TOC

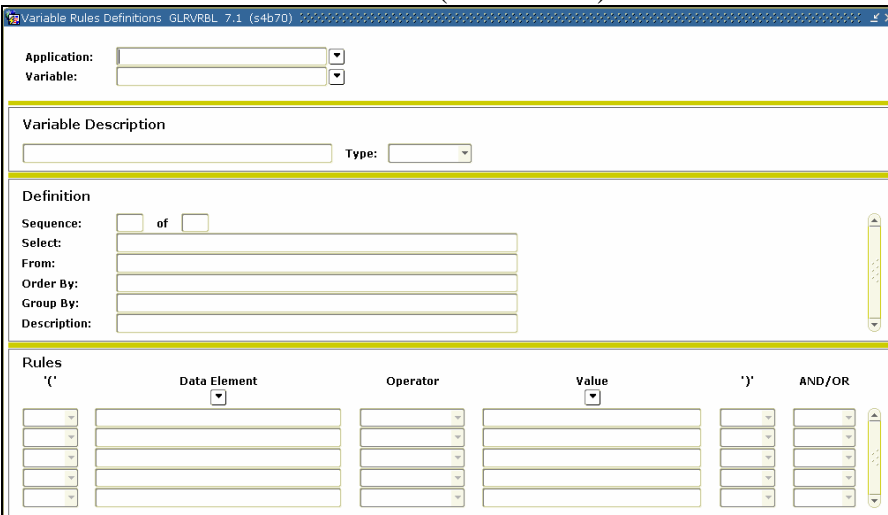
Introduction

You determine that you need to include the college and the constituent's class year in your letter. These are in two different tables, so you must reference both tables in the variable.

A JOIN is when you link two tables together that contain the information that you need.

How to complete

Follow these steps to complete the form.

Step	Action
1	Access the Variable Rules Definition Form (GLRVRBL). 
2	Enter your application in the Application field. <u>Note:</u> Make sure that the application code represents your personal application.
3	Enter *ADV_COL_CLin the Variable field to create a new variable code for college and class status.
4	Perform a Next Block function.
5	Enter <i>College Class Year</i> in the Description field.
6	Perform a Next Block function.
7	Enter STV_COLL_DESC, APBCONS_PREF_CLAS in the Select field of the Definition block.
8	Enter APBCONS, STV_COLL in the From field. <u>Note:</u> You must list all tables that are referenced in the From field.



Section B: Set Up

Lesson: Create a Variable Using a Join (Continued)

◀ Jump to TOC

Procedure, continued

Step	Action						
9	Enter a description for this line of your variable in the Description field. <i>Example: Selects Preferred Coll and Class.</i>						
10	Click the Save icon.						
11	Perform a Next Block function.						
12	Enter these values in the Rules block.						
	<table border="1"><tbody><tr><td>Data Element</td><td>APBCONS_COLL_CODE_PREF</td></tr><tr><td>Operator</td><td>=</td></tr><tr><td>Value</td><td>STV_COLL_CODE</td></tr></tbody></table>	Data Element	APBCONS_COLL_CODE_PREF	Operator	=	Value	STV_COLL_CODE
Data Element	APBCONS_COLL_CODE_PREF						
Operator	=						
Value	STV_COLL_CODE						
13	Leave all other fields empty.						
14	Click the Save icon.						
15	Click the Exit icon. <u>Note:</u> Your join was defined in the Rules block. Your rule stated that the preferred college you wanted was the description of the code for the person. In this case, you were required to perform the join because only PIDM joins are performed automatically. <u>Result:</u> You see the message 'Performing Variable Compilation, please wait.' If your variable is compiled successfully, you will exit the form automatically.						



Section B: Set Up

Lesson: Linking the Variables to the Paragraph on GUAPARA

◀ Jump to TOC

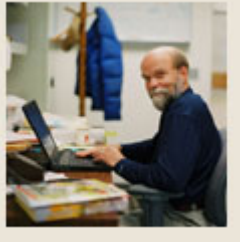
Introduction

Use this form to build a paragraph that can be inserted in letters on the Letter Process Form (GUALETR). A paragraph can include text, variables, and formatting commands.

Procedure

Follow these steps to complete the process.

Step	Action
1	<p>Access the Paragraph Process Form (GUAPARA).</p>
2	Enter the name of the paragraph that you are creating in the Paragraph field.
3	Perform a Next Block function to access the Text/Variable/Formatting block.



Section B: Set Up

Lesson: Linking the Variables to the Paragraph on GUAPARA (Continued)

◀ Jump to TOC

Procedure, continued

Step	Action																																																															
4	<p>Click the Search icon to access the Variable Inquiry Form (GLIVRBL).</p> <p>The screenshot shows the 'Variable Inquiry' form for 'ALUMNI' application. It displays a table with three columns: Variable, Description, and Activity Date. The table lists various variables such as *ACK_CITY_ST_ZIP, *ACK_Deduct_Value, *ACK_DUMMY, *ACK_FIRST_LAST_NAME, *ACK_FIRST_NAME, *ACK_FIRST_TYPE, *ACK_GIFT_AMT, *ACK_GIFT_CAMPAIGN, *ACK_GIFT_CAMP_AMT, *ACK_GIFT_CAMP_NO, *ACK_GIFT_DATE, *ACK_GIFT_DESG, *ACK_GIFT_INFORMATION, *ACK_GIFT_NO, *ACK_GIFT_VALUE, *ACK_GIFT_VALUE_FORMATTED, *ACK_LAST_NAME, *ACK_ORG_PRIMARY, *ACK_ORG_PRIMARY_ADDRESS, and *ACK_ORG_PRIMARY_NAME. Each variable is associated with a specific activity date.</p> <table border="1"> <thead> <tr> <th>Variable</th> <th>Description</th> <th>Activity Date</th> </tr> </thead> <tbody> <tr><td>*ACK_CITY_ST_ZIP</td><td>Ack. Const.City, State & Zip</td><td>01-NOV-1991</td></tr> <tr><td>*ACK_Deduct_Value</td><td>Deductible Value from Gift</td><td>25-APR-1994</td></tr> <tr><td>*ACK_DUMMY</td><td>Always Null</td><td>31-MAY-1993</td></tr> <tr><td>*ACK_FIRST_LAST_NAME</td><td>Ack. First, Last Name</td><td>10-JUN-1991</td></tr> <tr><td>*ACK_FIRST_NAME</td><td>Ack. First Name</td><td>14-OCT-1991</td></tr> <tr><td>*ACK_FIRST_TYPE</td><td>First Type Variable</td><td>01-JUN-1993</td></tr> <tr><td>*ACK_GIFT_AMT</td><td>Gift amount being acknowledged</td><td>30-JUL-1991</td></tr> <tr><td>*ACK_GIFT_CAMPAIGN</td><td>Ack. Gift Date,No,Amt, Camp.</td><td>30-OCT-1991</td></tr> <tr><td>*ACK_GIFT_CAMP_AMT</td><td>Gift Ack. Campaign Amount</td><td>30-JUL-1991</td></tr> <tr><td>*ACK_GIFT_CAMP_NO</td><td>Camp Gift no being acknowl</td><td>24-OCT-1991</td></tr> <tr><td>*ACK_GIFT_DATE</td><td>Gift Date for Acknowledgement</td><td>30-JUL-1991</td></tr> <tr><td>*ACK_GIFT_DESG</td><td>Gift Ack. Designation</td><td>22-OCT-1991</td></tr> <tr><td>*ACK_GIFT_INFORMATION</td><td>Gift Date, Amount, Designation</td><td>31-MAY-1993</td></tr> <tr><td>*ACK_GIFT_NO</td><td>Gift no being acknowledged</td><td>19-SEP-1991</td></tr> <tr><td>*ACK_GIFT_VALUE</td><td>Full Gift Amount</td><td>25-APR-1994</td></tr> <tr><td>*ACK_GIFT_VALUE_FORMATTED</td><td>Formatted Full Gift Amount</td><td>25-APR-1994</td></tr> <tr><td>*ACK_LAST_NAME</td><td>Ack. Last Name</td><td>23-OCT-1991</td></tr> <tr><td>*ACK_ORG_PRIMARY</td><td>Org Prim Contact -First name</td><td>23-OCT-1991</td></tr> <tr><td>*ACK_ORG_PRIMARY_ADDRESS</td><td>Org Primary Contact Address</td><td>01-JUN-1993</td></tr> <tr><td>*ACK_ORG_PRIMARY_NAME</td><td>Org primary contact name</td><td>01-JUN-1993</td></tr> </tbody> </table>	Variable	Description	Activity Date	*ACK_CITY_ST_ZIP	Ack. Const.City, State & Zip	01-NOV-1991	*ACK_Deduct_Value	Deductible Value from Gift	25-APR-1994	*ACK_DUMMY	Always Null	31-MAY-1993	*ACK_FIRST_LAST_NAME	Ack. First, Last Name	10-JUN-1991	*ACK_FIRST_NAME	Ack. First Name	14-OCT-1991	*ACK_FIRST_TYPE	First Type Variable	01-JUN-1993	*ACK_GIFT_AMT	Gift amount being acknowledged	30-JUL-1991	*ACK_GIFT_CAMPAIGN	Ack. Gift Date,No,Amt, Camp.	30-OCT-1991	*ACK_GIFT_CAMP_AMT	Gift Ack. Campaign Amount	30-JUL-1991	*ACK_GIFT_CAMP_NO	Camp Gift no being acknowl	24-OCT-1991	*ACK_GIFT_DATE	Gift Date for Acknowledgement	30-JUL-1991	*ACK_GIFT_DESG	Gift Ack. Designation	22-OCT-1991	*ACK_GIFT_INFORMATION	Gift Date, Amount, Designation	31-MAY-1993	*ACK_GIFT_NO	Gift no being acknowledged	19-SEP-1991	*ACK_GIFT_VALUE	Full Gift Amount	25-APR-1994	*ACK_GIFT_VALUE_FORMATTED	Formatted Full Gift Amount	25-APR-1994	*ACK_LAST_NAME	Ack. Last Name	23-OCT-1991	*ACK_ORG_PRIMARY	Org Prim Contact -First name	23-OCT-1991	*ACK_ORG_PRIMARY_ADDRESS	Org Primary Contact Address	01-JUN-1993	*ACK_ORG_PRIMARY_NAME	Org primary contact name	01-JUN-1993
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5	Enter the name of your application in the Application field.																																																															
6	Perform a Next Block function to view all of the existing variables.																																																															
7	Double-click to retrieve any variables needed for this specific paragraph.																																																															
8	Click the Save icon.																																																															
9	Repeat steps 2-8 for each paragraph that you are building.																																																															
10	Click the Exit icon.																																																															



Section B: Set Up

Lesson: Linking the Paragraph to the Letter on GUALETR

◀ Jump to TOC

Introduction

Use the Letter Process form (GUALETR) to build a letter from paragraphs created on the Paragraph Form (GUAPARA). You must specify the sequence in which the paragraphs appear.

The **Letter** code uniquely identifies the letter. These codes must be defined on the Letter Code Validation Form (GTVLETR).

The **Paragraph** codes identify the paragraphs in the letter. These codes must be defined on the Paragraph Code Validation Form (GTVLETR).

The **Sequence** number identifies the order in which the paragraphs appear in the letter.

Procedure

Follow these steps to complete the process.

Step	Action
1	<p>Access the Letter Process Form (GUALETR).</p>
2	Double-click in the Letter field to view the letter validation codes.
3	Double-click on a letter code to retrieve it back.
4	Perform a Next Block function to access the Paragraph field.
5	Double-click in the Paragraph field to view all of the paragraphs associated with this letter.
6	Double-click on a paragraph that you want in this letter.



Section B: Set Up

Lesson: Linking the Paragraph to the Letter on GUALETR (Continued)

◀ Jump to TOC

Procedure, continued

Step	Action
7	Enter a sequence in the Sequence field.
8	Repeat steps 5-7 until you have all of the paragraphs needed for this letter.
9	Click the Save icon.
10	Click the Exit icon.



Section B: Set Up

Lesson: Self Check

◀ [Jump to TOC](#)

Direction

Use the information that you have learned in this workbook to complete this self check activity.

Question 1

What steps are required for Set Up?

Question 2

What form is used to create the Paragraph?

Question 3

How are the variables and the paragraph linked?

Question 4

On what form would the user define a variable?



Section B: Set Up

Lesson: Answer Key

◀ Jump to TOC

Question 1

What steps are required for Set Up?

- **GTVLETR**
- **GTVPARA**
- **GLRVRBL**
- **GUAPARA**
- **GUALETR**
- **Population Selection process to get target audience**

Question 2

What form is used to create the Paragraph?

GTVPARA

Question 3

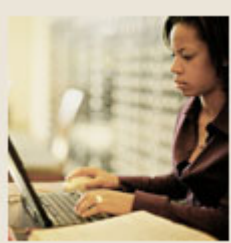
How are the variables and the paragraph linked?

On GUAPARA

Question 4

On what form would the user define a variable?

GLRVRBL



Section C: Day-to-Day Operations

Lesson: Overview

◀ Jump to TOC

Introduction

The Advancement Office can perform the following tasks in Letter Generation:

- Identify the target audience for the correspondence using SCT Banner’s Population Selection.
- Define common rules (objects) that are used in many different population selections and variables (this was not discussed previously).
- Define the variables used in Letter Generation to select a specific piece of data in the database.
- Build a paragraph that links to all the variables needed for the letter
- Link the paragraph to the letter code.
- Run the population selection and then, with this target audience, complete the letter generation process by running GLBLSEL and GLRLETR.
- Produce a download file of extracted data for Microsoft Word or WordPerfect.

Intended audience

Advancement Office staff.

Objectives

At the end of this course, participants will be able to:

- create variables
- link variables to a paragraph
- create a letter code
- create a letter by linking to a paragraph
- use the Letter Extract Process
- use the Letter Generation Print Report

Prerequisites

To complete this workbook, you should have completed the SCT Education Practices computer-based training (CBT) tutorial “SCT Banner 7 Fundamentals,” or have equivalent experience navigating in the SCT Banner system.

Section contents

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Letter Extract Process – Using Population Selection Criteria.....	37
Using the Letter Generation Print Report.....	39
Performing a Mail Merge	42
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Section C: Day-to-Day Operations

Lesson: Process Introduction

◀ Jump to TOC

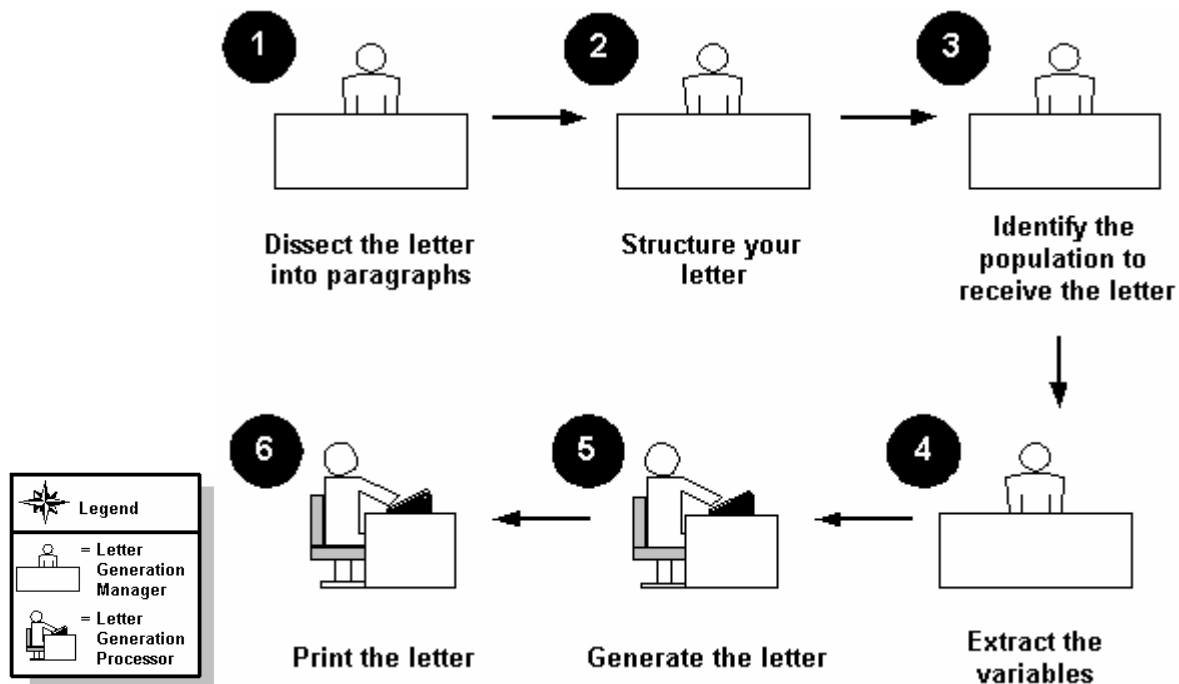
About this process

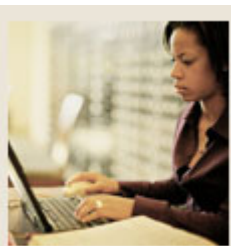
The Advancement office can perform all of the following tasks:

- Define the functional areas (applications) used in the Letter Generation and Population Selection modules.
- Define common rules (objects) that are used in many different population selections and variables.
- Define the variables used in the Population Selection and Letter Generation modules to select a specific piece of data in the database.
- Build paragraphs that include variables.
- Link the paragraph to the letter.
- Extract variable data from the database for pending letters, or for a specific letter and selected population.
- Merge the extracted variable data into the letter and generate letters, or produce a download file for Microsoft Word or WordPerfect.

Flow diagram

This diagram depicts the Letter Generation Process within the overall Advancement work flow.





Section C: Day-to-Day Operations

Lesson: Process Introduction (Continued)

◀ Jump to TOC

What happens

The stages of this process are described in this table.

Stage	Description
1	Make sure that the setup process for letters has been completed.
2	Structure your letter – determine the contents of your letter on paper.
3	Create a population selection for the audience receiving the letter.
4	Run the Letter Extract Process.
5	Run the Letter Generation Print Report (GLRLETR).
6	Print the letter by FTP results to desktop, then create a mail merge in Word or WordPerfect. Or, you can specify 'Database' as your printer in GLRLETR and save the results after viewing them in GJIREVO.



Section C: Day-to-Day Operations

Lesson: Creating a Population Selection

◀ Jump to TOC

Introduction

To identify the target audience for the correspondence, you will need to create a Population Selection. In this example, we are selecting records from the class of 1986.

Note: We are selecting the preferred class year from APACONS.

Procedure

Follow the steps to complete the procedure.

Step	Action
1	<p>Access the Population Selection Definition Form (GLRSLCT), where you will set up the rules to extract the group of records.</p> <p>The screenshot shows the 'Population Selection Definition Rules' form. It includes fields for 'Application' (ALUMNI), 'Selection ID' (CLASS86), and 'Creator ID' (ADISUSR). The 'Selection Description' field contains 'Alumni by preferred class'. The 'Definition' section has 'Select' set to 'APBCONS_PIDM' and 'From' set to 'APBCONS'. The 'Rules' section shows a table with columns for Data Element, Operator, Value, and AND/OR. The first rule is 'APBCONS_PREF_CLAS' with an equals sign operator and the value '1986'.</p>
2	Enter the name of the application in the Application field.
3	Enter an ID that identifies the population section in the Selection ID field.
4	Perform a Next Block function.
5	Enter a description of the selection on the Selection Description field.
6	Perform a Next Block function.
7	Enter the part of the population that is to be selected in the Select field.
8	Enter the name of the table where this population is being selected from in the From field.

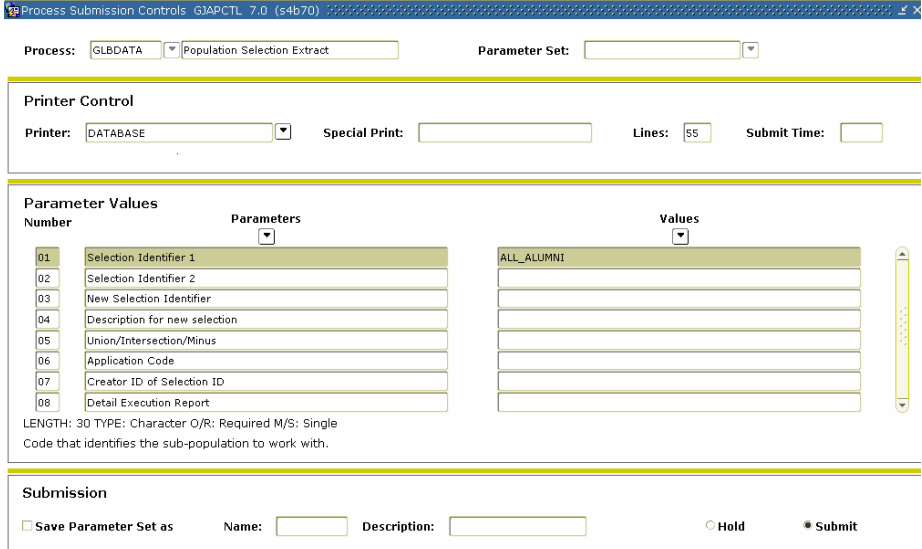


Section C: Day-to-Day Operations

Lesson: Creating a Population Selection (Continued)

◀ Jump to TOC

Procedure, continued

Step	Action
9	Perform a Next Block function.
10	Enter the database column name to be used as part of the rules statement in the Data Element field.
11	Select an Operator.
12	Enter the value to be compared (literal text, date value, number, another column or a sub query) as part of the rules statement in the Value field.
13	Continue entering as many rules as needed.
14	After the rules have been entered, click the Save icon.
15	Click the Exit icon to compile the rules.
16	<p>Access the Population Selection Extract Process (GLBDATA) via the Process Submission Controls Form (GJAPCTL) to execute the population selection criteria against the database to find the matches.</p>  <p>The screenshot shows the 'Process Submission Controls' form for 'GLBDATA - Population Selection Extract'. It includes a 'Printer Control' section with a printer dropdown set to 'DATABASE', 'Special Print', 'Lines' (55), and 'Submit Time' fields. The 'Parameter Values' section is a table with two columns: 'Parameters' and 'Values'. Parameter 01 is 'Selection Identifier 1' with the value 'ALL_ALUMNI'. Other parameters include Selection Identifier 2, New Selection Identifier, Description for new selection, Union/Intersection/Minus, Application Code, Creator ID of Selection ID, and Detail Execution Report. At the bottom, there is a 'Submission' section with a 'Save Parameter Set as' checkbox, 'Name' and 'Description' fields, and radio buttons for 'Hold' and 'Submit'.</p>
17	Enter the name of the population selection in Parameter 01 .
18	Enter values in Parameters 06 and 07 .
19	Perform a Next Block function.
20	Click the Submit radio button



Section C: Day-to-Day Operations

Lesson: Creating a Population Selection (Continued)

◀ [Jump to TOC](#)

Procedure, continued

Step	Action
21	Click the Save icon to run the process.
22	To view the results of the selection, use one of these three query forms: <ul style="list-style-type: none">• Population Selection Extract Inquiry (GLIEXTR)• Population Selection Extract Data (GLAEXTR)• Advancement Individual Browsing (APIBRWS)



Section C: Day-to-Day Operations

Lesson: Letter Extract Process – Using Population Selection Criteria

◀ Jump to TOC

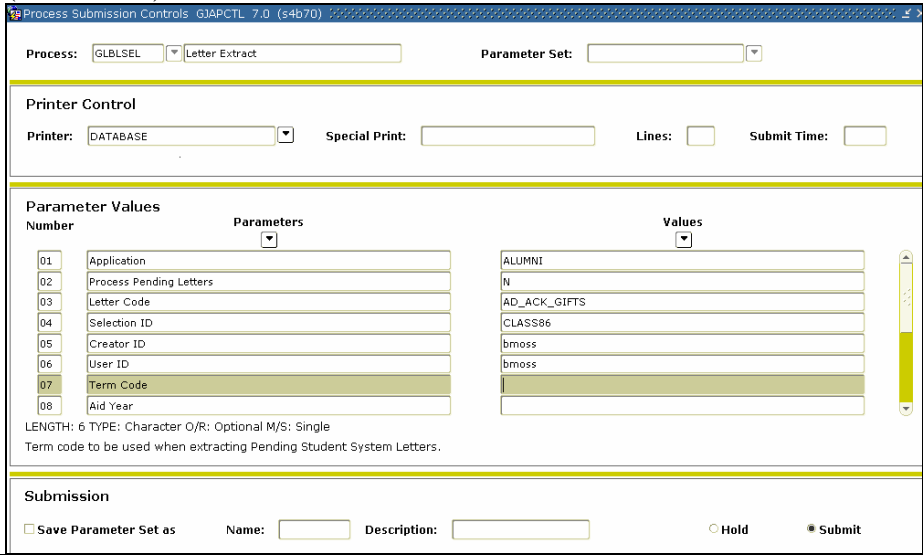
Introduction

The Letter Extract Process (GLBLSEL) extracts variable data from the Banner database to be included when letters are printed. This COBOL program is run before executing the Letter Generation Print Process (GLRLETR). GLBLSEL can be run for all pending letters (letters waiting to be printed) for a letter code, or for a letter code for a specific population.

If the letter cannot be created because no address existed in SPRADDR for that ID, or because the address was found but it is inactive, a log file will list the names and IDs for those who did not receive the letter. This listing is printed whether or not you elect to print the error report.

Procedure

Follow these steps to complete the procedure.

Step	Action																											
1	<p>Access the Letter Extract Process (GLBLSEL) via the Process Submission Control Form (GJAPCTL).</p>  <p>Parameter Values</p> <table border="1"> <thead> <tr> <th>Number</th> <th>Parameters</th> <th>Values</th> </tr> </thead> <tbody> <tr> <td>01</td> <td>Application</td> <td>ALUMNI</td> </tr> <tr> <td>02</td> <td>Process Pending Letters</td> <td>N</td> </tr> <tr> <td>03</td> <td>Letter Code</td> <td>AD_ACK_GIFTS</td> </tr> <tr> <td>04</td> <td>Selection ID</td> <td>CLASS86</td> </tr> <tr> <td>05</td> <td>Creator ID</td> <td>bmo55</td> </tr> <tr> <td>06</td> <td>User ID</td> <td>bmo55</td> </tr> <tr> <td>07</td> <td>Term Code</td> <td></td> </tr> <tr> <td>08</td> <td>Aid Year</td> <td></td> </tr> </tbody> </table> <p>LENGTH: 6 TYPE: Character O/R: Optional M/S: Single Term code to be used when extracting Pending Student System Letters.</p> <p>Submission</p> <p><input type="checkbox"/> Save Parameter Set as Name: Description: <input type="radio"/> Hold <input checked="" type="radio"/> Submit</p>	Number	Parameters	Values	01	Application	ALUMNI	02	Process Pending Letters	N	03	Letter Code	AD_ACK_GIFTS	04	Selection ID	CLASS86	05	Creator ID	bmo55	06	User ID	bmo55	07	Term Code		08	Aid Year	
Number	Parameters	Values																										
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06	User ID	bmo55																										
07	Term Code																											
08	Aid Year																											
2	Enter <i>DATABASE</i> in the Printer field.																											



Section C: Day-to-Day Operations

Lesson: Letter Extract Process – Using Population Selection Criteria (Continued)

◀ Jump to TOC

Procedure, continued

Step	Action
3	<p>Enter the following parameters:</p> <ul style="list-style-type: none"> • Parameter 01 – Application Code – Enter <i>ALUMNI</i> (All upper case) • Parameter 02 – Process Pending Letters – Enter <i>N</i> (only process the letter in Parameter 03) • Parameter 03 – Letter Code – Enter the letter code for the letter you wish to process (use the Search icon for the Values fields to view all letter codes. Double-click on an appropriate code to return to <i>GLBLSEL</i>) • Parameter 04 – Selection ID – Enter the name of the population selection (<i>CLASS86</i>, for example) • Parameter 05 – Creator ID – Enter the creator ID of the Population Selection. (The person who created the population selection; your <i>USERID</i> in this example) • Parameter 06 – User ID – Enter the user ID of the person who ran the population selection extract. (Your <i>USERID</i> in this example) • Parameter 09 – Address Selection Date – Enter the current date • Parameter 10 – Address Type – Enter <i>IMA</i> <p>(If you wish to create a hierarchy of address types, perform an Insert Record function to create a space, enter <i>10</i> again, then enter <i>2PR</i> or whatever address type you want to use if <i>MA</i> is not active. If you are using the view <i>SPVADDS</i> in your variable, this will search for the <i>ACTIVE</i> address for each record.)</p> <p><u>Note:</u> Advancement often has unique address types other than <i>MA</i>, <i>PR</i> etc., such as <i>SE</i> for seasonal.</p>
4	Perform a Next Block function to access the Submission Block.
5	Click the Save icon.
6	The form will clear, and the cursor will return to the Key block. A sequence number will display in the Auto help line. Make sure this process has completed by selecting Review Output from the Options menu to access <i>GJIREVO</i> .



Section C: Day-to-Day Operations

Lesson: Using the Letter Generation Print Report

◀ Jump to TOC

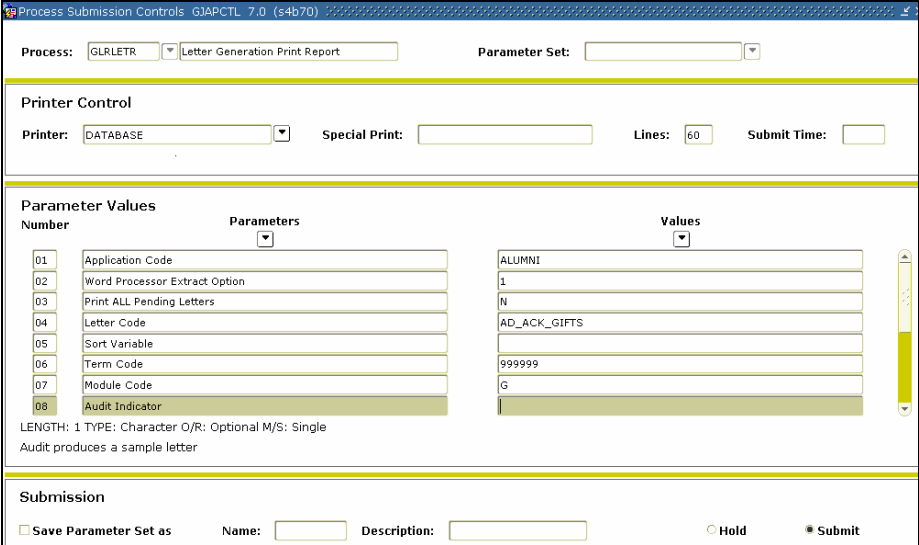
Introduction

After you have run the Letter Generation Extract Process (GLBLSEL), the Letter Generation Print Report (GLRLETR) needs to be executed. This report does the following:

- generates either letters or produces a file that can be downloaded to Microsoft Word or WordPerfect
- prints a summary report
- updates the General Mail Table (GURMAIL) and the Advancement Mail Table (AUAMAIL).

Procedure

Follow these steps to complete the process.

Step	Action																											
1	<p>Access the Letter Generation Print Report (GLRLETR) via the Process Submission Controls Form (GJAPCTL).</p>  <p>The screenshot shows the 'Process Submission Controls' form for 'GLRLETR'. It includes a 'Printer Control' section with a 'Printer' dropdown set to 'DATABASE' and 'Lines' set to '60'. Below is a 'Parameter Values' table with columns for 'Number', 'Parameters', and 'Values'. The table contains 8 rows of parameters. At the bottom, there is a 'Submission' section with options for 'Save Parameter Set as', 'Name', 'Description', 'Hold', and 'Submit'.</p> <table border="1" data-bbox="310 1255 1198 1465"> <thead> <tr> <th>Number</th> <th>Parameters</th> <th>Values</th> </tr> </thead> <tbody> <tr> <td>01</td> <td>Application Code</td> <td>ALUMNI</td> </tr> <tr> <td>02</td> <td>Word Processor Extract Option</td> <td>1</td> </tr> <tr> <td>03</td> <td>Print ALL Pending Letters</td> <td>N</td> </tr> <tr> <td>04</td> <td>Letter Code</td> <td>AD_ACK_GIFTS</td> </tr> <tr> <td>05</td> <td>Sort Variable</td> <td></td> </tr> <tr> <td>06</td> <td>Term Code</td> <td>999999</td> </tr> <tr> <td>07</td> <td>Module Code</td> <td>G</td> </tr> <tr> <td>08</td> <td>Audit Indicator</td> <td></td> </tr> </tbody> </table>	Number	Parameters	Values	01	Application Code	ALUMNI	02	Word Processor Extract Option	1	03	Print ALL Pending Letters	N	04	Letter Code	AD_ACK_GIFTS	05	Sort Variable		06	Term Code	999999	07	Module Code	G	08	Audit Indicator	
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08	Audit Indicator																											
2	Perform a Next Block function to access the Printer block.																											
3	Select the printer that you are using, or enter <i>DATABASE</i> so that you may later review the output on the Saved Output Review Form (GJIREVO).																											



Section C: Day-to-Day Operations

Lesson: Using the Letter Generation Print Report (Continued)

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Procedure, continued

Step	Action
4	Perform a Next Block function to access the Parameter Values block.
5	Enter the following parameters: <ul style="list-style-type: none">• Parameter 01 Application = <i>Alumni</i>• Parameter 02 Word Processor Extract Option = 1 for Word (.doc) or 2 for WordPerfect (.wpf) (The resulting file will have a .doc extension if Microsoft Word is selected, or a .wpf extension if WordPerfect is selected.)• Parameter 03 Print ALL pending letters = <i>N</i>• Parameter 04 Letter code = Enter the letter code you used in GLBLSEL• Parameter 05 Sort Variable = see options in message line• Parameter 06 Term Code = leave blank• Parameter 07 Module Code = <i>C (Constituent)</i>• Parameter 08 Audit Indicator = Leave DEFAULT values• Parameter 09 Free Form Date 1 = Leave DEFAULT values• Parameter 10 Free Form Date 2 = Leave DEFAULT values• Parameter 11 Free Form Date 3 = Leave DEFAULT values• Parameter 12 Aid Year Code = Leave DEFAULT values
6	Perform a Next Block function.
7	Click the Submit radio button.
8	Click the Save icon.
9	Access GJIREVO to view the three output files: LOG, LIS and .doc/.wpf file.
10	Save the .doc/.wpf file to the desktop.
11	Perform the mail merge process and print the letters.



Section C: Day-to-Day Operations

Lesson: Using the Letter Generation Print Report (Continued)

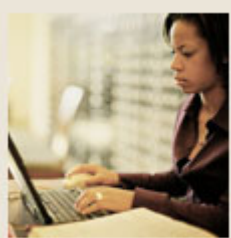
◀ Jump to TOC

File transfer protocol (FTP)

Move the results from GLRLETR to the desktop.

Note: This is optional in Internet Native Banner.

Step	Action
1	Open MS_FTP.
2	Connect using the Development connection. <u>Note:</u> Your IT will provide passwords and instructions for this.
3	Search on the right-hand-side column for your field. <u>Note:</u> The file will be listed as the name of the SCT Banner letter code with an extension of. <i>doc</i> (RECEIPT. Doc for example) if Word is chosen.
4	Select the file.
5	Click the Left Arrow icon to copy the file to your hard drive (C:\Banner Letters).



Section C: Day-to-Day Operations

Lesson: Performing a Mail Merge

◀ Jump to TOC

Introduction

The mail merge is used to merge the variable information selected from Banner with the text of the acknowledgement. The final result then can be reviewed, modified as needed, and then printed.

This step must be done for each acknowledgment.

Procedure

Follow these steps to complete the process.

Step	Action
1	Open the document that contains the merge setup and text (your letter shell).
2	Perform the “ Merge to new file ” function to merge the Banner extract data with the text.
3	A new document will be created.
4	You will receive a message that the last record “was an empty record”
5	Click OK .
6	After you review the merge, make any necessary corrections and print. <u>Note:</u> You can sort or use the filter to isolate a selected group of records (for example, to print those belonging to one signer).
7	You can also use the IF, THEN, ELSE option in mail merge to insert additional information into the appropriate letter.
8	Repeat the process for each letter.



Section C: Day-to-Day Operations

Lesson: Self Check

◀ [Jump to TOC](#)

Direction

Use the information that you have learned in this workbook to complete this self check activity.

Question 1

How does the user create the target audience for the letter?

Question 2

What does a variable start with and where should it be positioned?

Question 3

Where is the software for the mail merge indicated?

Question 4

Can variables be used in different letters?



Section C: Day-to-Day Operations

Lesson: Answer Key

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Question 1

How does the user create the target audience for the letter?

- **Using Population Selection Process**
- **GLRSLCT**
- **GLBDATA**
- **GLIEXTR, GLAEXTR or APIBRWS**

Question 2

What does a variable start with and where should it be positioned?

An asterisk in the first position

Question 3

Where is the software for the mail merge indicated?

GLRLETR

Question 4

Can variables be used in different letters?

Yes



Section D: Reference

Lesson: Overview

◀ [Jump to TOC](#)

Introduction

The purpose of this section is to provide reference materials related to the workbook.

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Day-to-Day Forms and Setup Needed.....	47
Forms Job Aid	48



Section D: Reference

Lesson: Setup Forms and Where Used

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Guide

Use this table as a guide to the setup forms and the day-to-day forms that use them.

Setup Form		Day-to-Day Form(s)	
Form Name	Code	Form Name	Code
Variable Rules Definition	GLRVRBL	Paragraph Letter Process	GUAPARA GUALETR
Letter Code Validation	GTVLETR	Letter Process	GUALETR
Paragraph Code Validation	GTVPARA	Paragraph Letter Process	GUAPARA GUALETR
Application Definition Rules	GLRAPPL	Letter Extract Process Letter Generation Print Report	GLBLSEL GLRLETR
Population Selection Definition Rules	GLRSLCT	Letter Extract Process Letter Generation Print Report	GLBLSEL GLRLETR



Section D: Reference

Lesson: Day-to-Day Forms and Setup Needed

◀ [Jump to TOC](#)

Guide

Use this table as a guide to the day-to-day forms and the setup forms needed for each.

Day-to-Day Form	Setup Forms Needed
Paragraph Form (GUAPARA)	<ul style="list-style-type: none">• Paragraph Code Validation (GTVPARA)• Variable Rules Definition (GLRVRBL)
Letter Process Form (GUALETR)	<ul style="list-style-type: none">• Letter Code Validation (GTVLETR)• Paragraph Code Validation (GTVPARA)



Section D: Reference

Lesson: Forms Job Aid

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Guide

Use this table as a guide to the forms used in this workbook. The Owner column may be used as a way to designate the individual(s) responsible for maintaining a form.

Form Name	Form/Process Description	Owner
GLRVRBL	Variable Rules Definition	
GTVLETR	Letter Code Validation	
GTVPARA	Paragraph Code Validation	
GLRAPPL	Application Definition Rules	
GLRSLCT	Population Selection Definition Rules	
GUAPARA	Paragraph	
GUALETR	Letter Process	
GLBLSEL	Letter Extract Process	
GLRLETR	Letter Generation Print Report	



Release Date

◀ [Jump to TOC](#)

This workbook was last updated on 11/7/2005.