Banner Student
Letter Generation Training Workbook

May 2006
Release 7.3

SUNGARD HIGHER EDUCATION

What can we help you achieve?

Prepared By: SunGard Higher Education
4 Country View Road
Malvern, Pennsylvania 19355
United States of America

Table of Contents

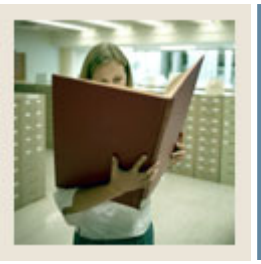


Table of Contents (Continued)

Section A: Introduction

Lesson: Overview

Jump to TOC

Workbook goal

This course is intended to teach you to identify key forms, tables, and reports used in Banner Student Letter Generation. The workbook is divided into these sections:

- Introduction
- Printed Letter Set Up
- Printed Letter Day-to-Day Operations
- Downloaded Letter Set Up
- Downloaded Letter Day-to-Day Operations
- Reference

Intended audience

Student Administrators and Staff

Section contents

Section A: Introduction

Lesson: Process Introduction

Jump to TOC

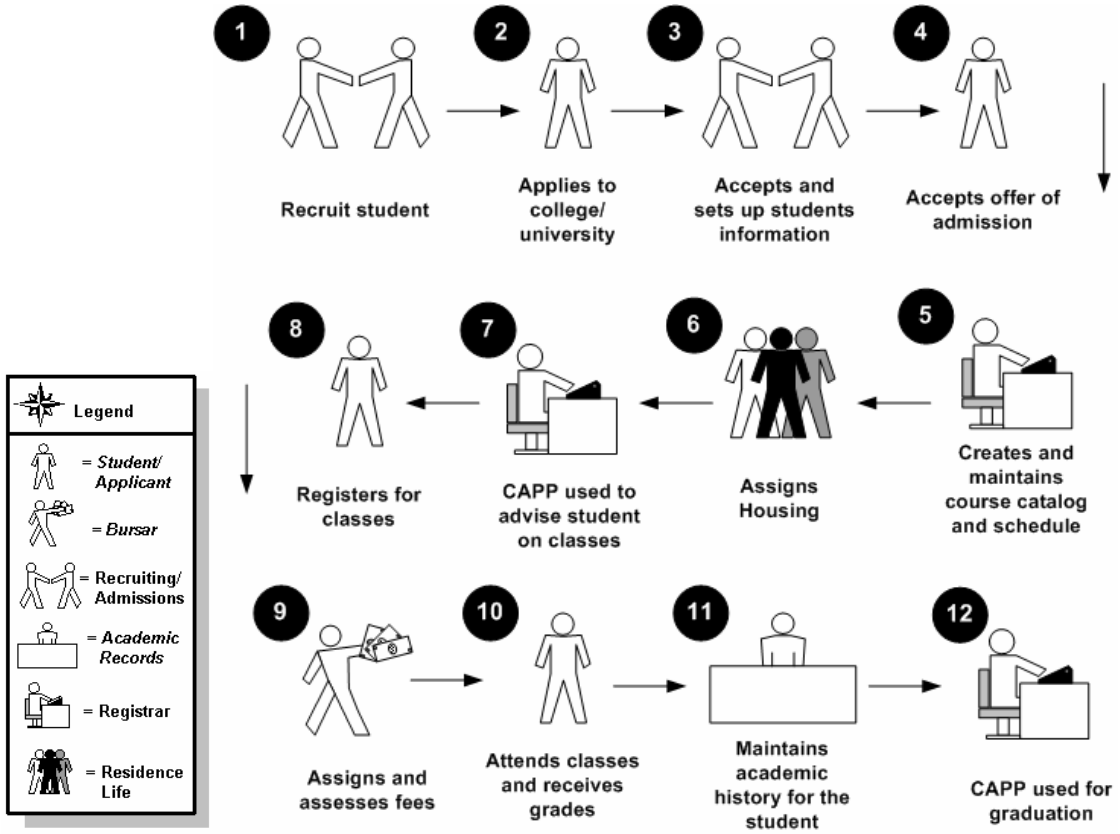
Introduction

The Student Letter Generation course demonstrates how to generate a letter for a particular population in Banner Student. The letter is produced by combining Banner data generated from the results of a Population Selection or a Communication Plan rule and merging it with the letter generation template.

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 overall Student process. The Letter Generation process can occur anywhere within this process.



Section A: Introduction

Lesson: Process Introduction (Continued)

Jump to TOC

About the process

To produce a letter, you will

- dissect a letter into paragraphs and identify variables
- create the variables
- create the letter code
- create the paragraph codes
- build the paragraphs
- build the letter
- identify the Population to receive the letter
- extract variable data
- generate the letter.

Note: Some of the above will apply only to letters generated within Banner, not to letters downloaded to third-party software.

Section A: Introduction

Lesson: Terminology

Jump to TOC

Application

A functional area with similar characteristics that can be applied to population selections and variables. An application "owns" the population selection rules and variables and can be used to define global rules for either.

Formatting commands

Commands that affect the appearance of the letter such as margins, tabs, underlines and centers.

Note: These are not necessary if you are downloading the letter from Banner and using word processing software to produce your final letter.

Letter

Information that is extracted from Banner, that is either formatted into a letter within Banner, or used to create a file exported to a word processing application. A letter can contain a single paragraph or a series of paragraphs.

There are two types of letters:

Downloaded Letter: Letter that is downloaded from Banner to a third-party word processing application (Word or WordPerfect).

Printed Letter: Letter generated within Banner.

Letter code

Code that identifies the name and description of the letter

Paragraph

A paragraph within Banner contains text, variables and formatting commands.

Note: If the letter is to be downloaded to Word or WordPerfect, it will contain only variables.

Paragraph code

Code that identifies the name and description of the paragraph

PIDM

Person Identification Master is the internal identifier used to identify a person or a non-person in the Banner database. Multiple external IDs and names may be associated with a single PIDM.

Text
Boilerplate text that surrounds the variables and is formatted via formatting commands.

Note: This is not used if the letter is to be downloaded to Word or WordPerfect.

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

Section A: Introduction

Lesson: Letter Generation Overview

Jump to TOC

What is Letter Generation?

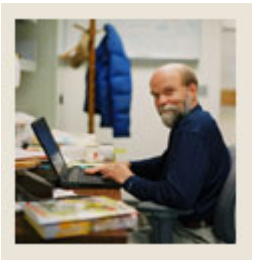
Letter Generation allows you to extract data from Banner based on a given population, merge extracted data with text, print the results, and maintain a log of printed letters.

How does Letter Generation work?

Letter Generation extracts specific data from the PIDMs, which are extracted during a Population Selection.

```
SELECT spriden_first_name,
spriden_last_name
FROM spriden
WHERE pop_sel criteria
```

Next, it merges the extracted data with paragraphs customized for your implementation.



Section B: Set Up

Lesson: Overview

Purpose

The purpose of this section is to outline the setup process and detail the procedures to set up your Banner system to handle Letter Generation for printed letters.

Objectives

At the end of this section, you will be able to create the rules, codes, and set parameters used to generate bulk letters, award letters, postcard information or labels.

Section contents

Section B: Set Up

Lesson: Rules and Validation Forms Used in Letter Generation

Jump to TOC

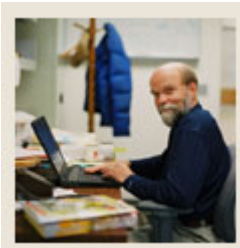
Introduction

Before completing day-to-day tasks associated with Banner Letter Generation, there are several forms and rules that need to be set or created.

Rule and validation forms

These forms are used to set the rules and parameters in Banner for handling generated letters.

Form Description	Banner Name
Population Selection Definition Rules	GLRSLCT
System Indicator Validation	GTVSYSI
Application Definition Rules	GLRAPPL
Letter Code Validation	GTVLETR
Paragraph Code Validation	GTVPARA
Variable Rules Definition	GLRVRBL



Section B: Set Up

Lesson: Population Selection Definition Rules

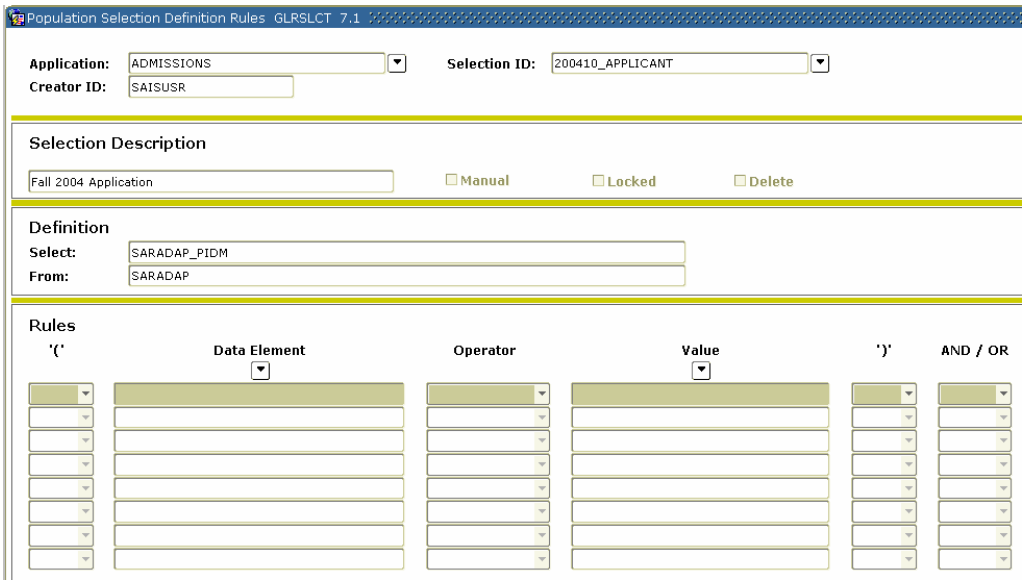
Jump to TOC

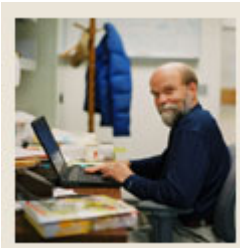
Description

The Population Selection Definition Rules Form (GLRSLCT) defines a Population Selection, which is a set of rules used to select IDs from the Banner database for reports, processes and letters.

Note: Defining a population is a prerequisite to this course.

Screen image





Section B: Set Up

Lesson: System Indicator Validation

Jump to TOC

Description

The System Indicator Validation Form (GTVSYSI) defines codes that identify the Banner applications used at your institution.

Screen image

System Indicator Validation GTVSYSI 7.0

System	Description	Activity Date
A	Alumni	27-JAN-1992
AW	Advancement Self-Service	06-JUN-2003
B	Property Tax	08-DEC-1995
C	Courts	27-JAN-1992
D	Cash Receipts	08-DEC-1995
E	Banner XtenderSolutions	02-JAN-2002
F	Finance	27-JAN-1992
FW	Finance Self-Service	04-OCT-2002
G	General	27-JAN-1992
GW	Web General	06-JUN-2003
H	Human Resources	27-JAN-1992
IC	Integration Components	21-JUL-2000
IF	Kiosk (Information Access)	30-NOV-2004
L	Occupational Tax and License	08-DEC-1995
LW	Faculty/Advisor Self-Service	10-JUN-2003
M	Micro-Faids Interface	13-FEB-1992
N	Position Control	07-NOV-1995
PW	Employee Self-Service	10-JUN-2003
R	Financial Aid	27-JAN-1992
S	Student	27-JAN-1992
SW	Student Self-Service	09-JUN-2003

Section B: Set Up

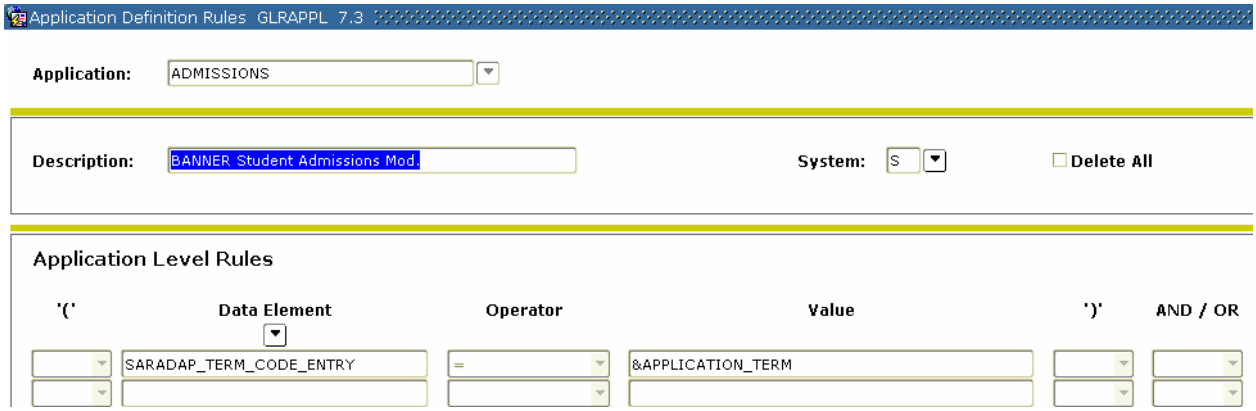
Lesson: Creating an Application

Jump to TOC

Banner form

The Application Definition Rules Form (GLRAPPL) defines an application, which is a functional area that controls Population Selections, populations and variables.

Note: Each application has to be created only once.



Procedure

You defined the letters required by your organization but would like to build them in a new application. You also have determined that you need to use the name prefix in some letters. You have researched where this data is stored in the system and you know the name of the table (SPBPERS) and the data element (SPBPERS_NAME_PREFIX).

Follow these steps to complete the process.

Step	Action
1	Access the Application Inquiry Form (GLIAPPL) to review the list of applications already defined.
2	Access the Application Definition Rules Form (GLRAPPL).
3	Enter *XXX_APPLICATION* in the **Application** field. Example: XXX = your initials. Therefore, James C. Quick would enter *JCQ_APPLICATION.*
4	Perform a **Next Block** function. Enter [*Your Name*] *Application* in the **Description** field. Example: James Quick would enter *James Quick's Application.*

Procedure, continued

Step	Action
5	Perform a **Next Block** function.
6	Enter the code applicable to your system in the **System** field: *A* Alumni *F* Finance *G* General *H* Human Resources *R* Financial Aid *S* Student. Note: No rules need to be entered in the Application Level Rules block. An application can be created with or without application level rules.
7	Click the **Save** icon.
8	Click the **Exit** icon.

Section B: Set Up

Lesson: Creating a Paragraph Code

Jump to TOC

Introduction

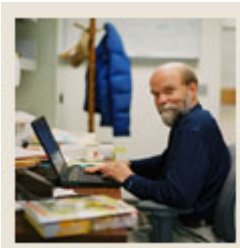
Your organization has decided to convert all basic person data for all known persons. You are assisting in the verification effort and want to send a letter to all persons for whom data was converted. You have prepared your letter and need to determine how many paragraphs you have.

Banner form

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

Paragraph Code Validation GTVPARA 7.0

Code	Description	Comment	Activity Date
ACCEPT	Admissions Acceptance Para	Body of the Admissions Acceptance letter	03-OCT-1991
ACK_ALL	All Acknowledgement Info	All information needed for Acknowledgement Letter Merges	28-MAR-2005
ACK_BDY	Body of Acknowledgement Letter		31-MAY-1993
ACK_DTE	Letter Date		31-MAY-1993
ACK_LIN	Line Count for Page		31-MAY-1993
ACK_NAD	Name and Address for Ack.	Person or Org Name and Address	31-MAY-1993
ACK_NPG	New Page Command		31-MAY-1993
ACK_SAL	Person/Org Salutations	Person or organization salutations for acknowledgement/receipt	01-JUN-1993
ACK_TAB	Ack tables 1-3	Gift Acknowledgement letter table definition.	29-OCT-1991
ACK_TDF	Table Definitions for Gift Ack	Gift Acknowledgement letter table definition.	31-MAY-1993
ACPT_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
AKGSIGN	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	Acknowldegemnt address name for constituent.	23-OCT-1991
ANAMESL	A/D Ack. first name salutation	Alumni Development name salutation for ackowledgements.	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 ackowledgements.	23-OCT-1991



Letter example

Your letter will look like this:

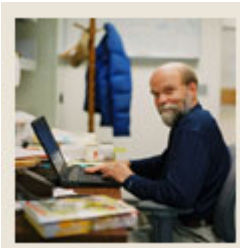
```
Date

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

Dear  <Preferred Name>,

We recently converted our database information to the Banner system.

Please verify the information below.  If there are any errors, contact
our office at 1-800-555-5555.
<Gender>
<Current ID>
<Marital Status>

Sincerely,
Ms. Sue Doe
```

Setting up your paragraphs

All letters printed by Banner begin with two paragraphs. The first will determine that a new page is to be printed and the second will determine the table settings for the paragraphs to be printed. The paragraphs for your letter follow. You must determine if a paragraph code exists on GTVPARA. If not, a code must be generated.

Each paragraph will have a specific purpose:

- First: New page
- Second: Defining your table settings
- Third: Date, address and salutation
- Fourth: The body of the letter
- Fifth: The closing



Section B: Set Up

Lesson: Creating a Paragraph Code (Continued)

Jump to TOC

Procedure

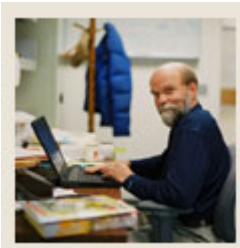
In this exercise, you will create your first paragraph code using your initials. For a printed letter, it is your initials and an identifying number.

Note: You can use the same paragraph for either printed letters or downloaded letters. The system will extract only variables from the paragraphs when using the download feature.

Warning: Poll the other participants in the class to prevent duplicate paragraph codes. Choose other initials if necessary.

Follow these steps to complete the process.

Step	Action
1	Access the Paragraph Code Validation Form (GTVPARA).
2	Enter and execute a query to determine that the paragraph code you would like to create does not already exist.
3	Perform an **Insert Record** function to enter a new code.
4	Enter your paragraph code in the **Code** field. Example: James Quick would create either paragraph *JQ1* or *JQ_DLP*.
5	Enter a description for the code in the **Description** field.
6	Enter text that describes your paragraph in the **Comment** field.
7	Create a code in the same manner for the paragraph listed in the explanation preceding the exercise. This will be for the third paragraph (date, inside address and salutation). Name it XX_IA, where *XX*= your initials. Note: This paragraph code is used in later exercises.
8	Click the **Save** icon.
9	Click the **Exit** icon.



Section B: Set Up

Lesson: Creating a Letter Code

Jump to TOC

Banner form

You will use the Letter Code Validation Form (GTVLETR) to define codes that identify the letters you can generate in Banner. Examples of letters include acknowledgement, applicant, and financial aid offers.

Letter Code Validation GTVLETR 7.0

Letter Code	Description	Allow Duplicates	Alternate Letter Code	Print Command	Activity Date
ADM_ACCT_ACCEPT	Admissions Accounting Accept	☑			12-MAY-2006
ADM_APPL_ACKN	Admissions Application Ackn	☑			20-MAY-2005
ADM_CHKL	Admissions Checklist Letter	☐			17-MAY-1995
ADM_FA_INTEREST	Financial Aid Interest Letter	☐			23-MAY-1995

Procedure

You have finished defining the individual paragraphs for your letter and you are ready to create the letter itself. The first step is to create a letter code.

Follow these steps to complete the process.

Step	Action
1	Access the Letter Code Validation Form (GTVLETR).
2	0 Enter and execute a query to ensure that the letter code you intend to create does not already exist. Note: Search for the code XX_LETR (XX = your initials).
3	Click the **Insert Record** icon.

Section B: Set Up

Lesson: Creating a Letter Code (Continued)

Jump to TOC

Procedure, continued

Step	Action
4	Enter the name of your letter in the **Letter Code** field. Example: James Quick would enter *JQ_LETR.*
5	Enter a name for your letter in the **Description** field, using your name in the text. Example: James Quick would enter *James Quick's Test Letter*.
6	Leave the **Allow Duplicates** checkbox empty. Checking this box will allow duplicates of this letter to be requested or produced for a person. Note: If the **Allow Duplicates** checkbox is empty, you may enter an alternate letter code. The alternate letter code will be created for a person if they are selected to receive a duplicate letter via the Dues Acknowledgement Process (AAPACKN) or the Pledge Gift Acknowledgement Process (AGPACKN), or if they have already received the letter in the primary key field. Note: If the **Allow Duplicates** checkbox is empty and the **Alternate Letter Code** field is empty, no letter is generated for an ID selected to receive a duplicate letter.
7	Click the **Save** icon.
8	Click the **Exit** icon.

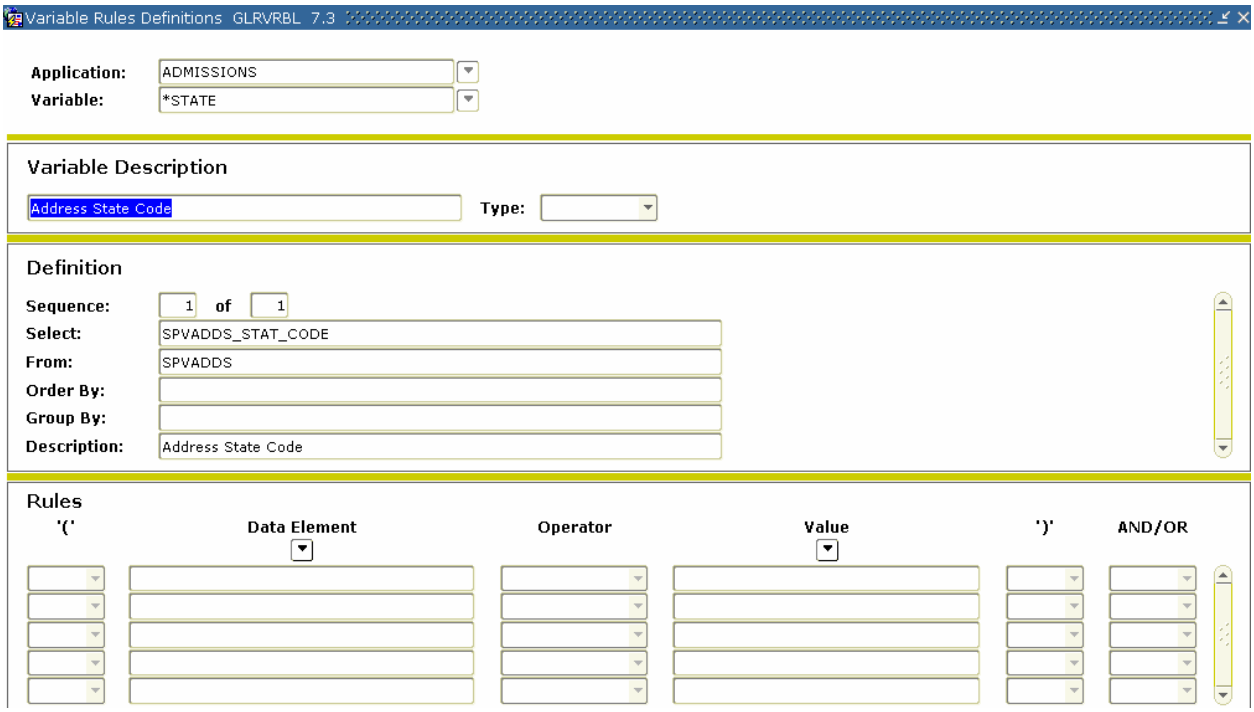
Section B: Set Up

Lesson: Creating Simple Variable Rules

Jump to TOC

Banner form

The Variable Rules Definition Form (GLRVRBL) is used to define, maintain, and copy a variable. A variable is a specific piece of data in the database and the set of rules used to select that data. Variables are used to insert variable data into letters and reference subqueries in application rules, population selection rules, and variable rules.



Variables

A variable is a specific piece of data in the database and the set of rules used to select that data. Variables are used to insert variable data into letters and reference subqueries in application rules, population selection rules, and variable rules. Any data element associated with an ID can be defined as a variable.

Note: Each variable has to be created only once.

Section B: Set Up

Lesson: Creating Simple Variable Rules (Continued)

Jump to TOC

Procedure

Follow these steps to create a variable.

Step	Action
1	Access the Variable Rules Definition Form (GLRVRBL).
2	Enter your application name in the **Application** field.
3	0 Enter the name for your variable in the **Variable** field. Start your variable name with an asterisk (*). 1 Note: For easy identification, include your initials. Example: James Quick would create current ID variable **JQ_ID*.
4	Perform a **Next Block** function.
5	Enter a description for your variable in the **Description** field.
6	Click the down arrow next to the **Type** field, to designate this variable as *First*, meaning the first variable to be processed by GLBLSEL. You will have to choose one variable to use as a first. We recommend your first variable to be a field that will always contain data; for example, first name or last name. Note: Depending on how you are logged into the system, the Alternate Logon Verification Form (GUAUIPW) may or may not display. If it does, enter the alternate user ID and alternate password as instructed. You are returned to the Variable Rules Definition Form.
7	Perform a **Next Block** function.
8	Enter *SPBPERS_NAME_PREFIX* in the **Select** field. This is the prefix column from the SPBPERS table.
9	Enter *SPBPERS* in the **From** field. This is the table name.
10	Enter *Name Prefix* in the **Description** field. This is a description for the logic in the sequence. Note: No values need to be entered in the Rules block.
12	Click the **Save** icon.

Procedure, continued

Step	Action
13	Click the **Exit** icon. Note: You see the message *Performing Variable Compilation, please wait.* If your variable is compiled successfully, the form will exit automatically. Note: If your variable does not compile successfully, an error message displays. An acknowledgement is required. The Process Results Form (GJARSLT) displays and the error that caused the compilation to terminate displays along with any other previous error messages. Note: Using the steps above, create variables for the other data elements that you are using in your letter. Remember to click the **Save** icon and click the **Exit** icon after creating each variable so your variables compile successfully.

Section B: Set Up

Lesson: Creating Simple Variable Rules (Continued)

Jump to TOC

List of variables

Here is a list of variables that you may find useful as well as what you will enter in the **Select** and **From** fields in the Variable Rules Definition Form (GLRVRBL).

Note: *XX* equals the initials you chose to enter.

Variable	Select and From Fields
Today's Date: *XX_DATE	**SELECT:** RTRIM(TO_CHAR(SYSDATE,'Month')||''||TO_CHAR(SYSDATE,'DD,YYYY') 0 **FROM:** DUAL *Note The SELECT line should be continuous
First Name: 0 1 *XX_FNAM	0 **SELECT:** SPVADDS_FIRST_NAME 1 2 **FROM:** SPVADDS
Middle Name: 0 1 *XX_MI	3 **SELECT:** SPVADDS_MI 4 5 **FROM:** SPVADDS
Last Name: 0 1 *XX_LNAM	6 **SELECT:** SPVADDS_LAST_NAME 7 8 **FROM:** SPVADDS
Prefix: 0 1 *XX_PFX	9 **SELECT:** SPBPERS_NAME_PREFIX 10 11 **FROM:** SPBPERS
Suffix: 0 1 *XX_SUFF	12 **SELECT:** SPBPERS_NAME_SUFFIX 13 14 **FROM:** SPBPERS
0 **Address Line 1:** 1 2 *XX_ADD	15 **SELECT:** SPVADDS_STREET_LINE1 16 17 **FROM:** SPVADDS

Procedure, continued

Variable	Select and From Fields
Address Line 2: 0 1 *XX_ADD2	18 **SELECT:** SPVADDS_STREET_LINE2 19 20 **FROM:** SPVADDS
0 Address Line 3: 1 *XX_ADD3	21 **SELECT:** SPVADDS_STREET_LINE3 22 23 **FROM:** SPVADDS
2 City: 3 *XX_CITY	24 **SELECT:** SPVADDS_CITY 25 26 **FROM:** SPVADDS
0 **State:** 1 *XX_STATE	0 **SELECT:** SPVADDS_STAT_CODE 1 2 **FROM:** SPVADDS
2 Zip: 3 *XX_ZIP	3 **SELECT:** SPVADDS_ZIP 4 5 **FROM:** SPVADDS
4 Preferred First Name: 5 *XX_PFN	6 **SELECT:** SPBPERS_PREF_FIRST_NAME 7 8 **FROM:** SPBPERS
6 Gender: 7 *XX_GEND	9 **SELECT:** SPBPERS_SEX 10 11 **FROM:** SPBPERS
8 Current ID: 9 *XX_ID (first type variable)	12 **SELECT:** SPVADDS_ID 13 **14 FROM:** SPVADDS
10 Marital Status: 11 *XX_MRTL	15 **SELECT:** SPBPERS_MRTL_CODE 16 **17 FROM:** SPBPERS
12 Nation: 13 *XX_NATN	18 **SELECT:** SPVADDS_NATN_DESC 19 **20 FROM:** SPVADDS

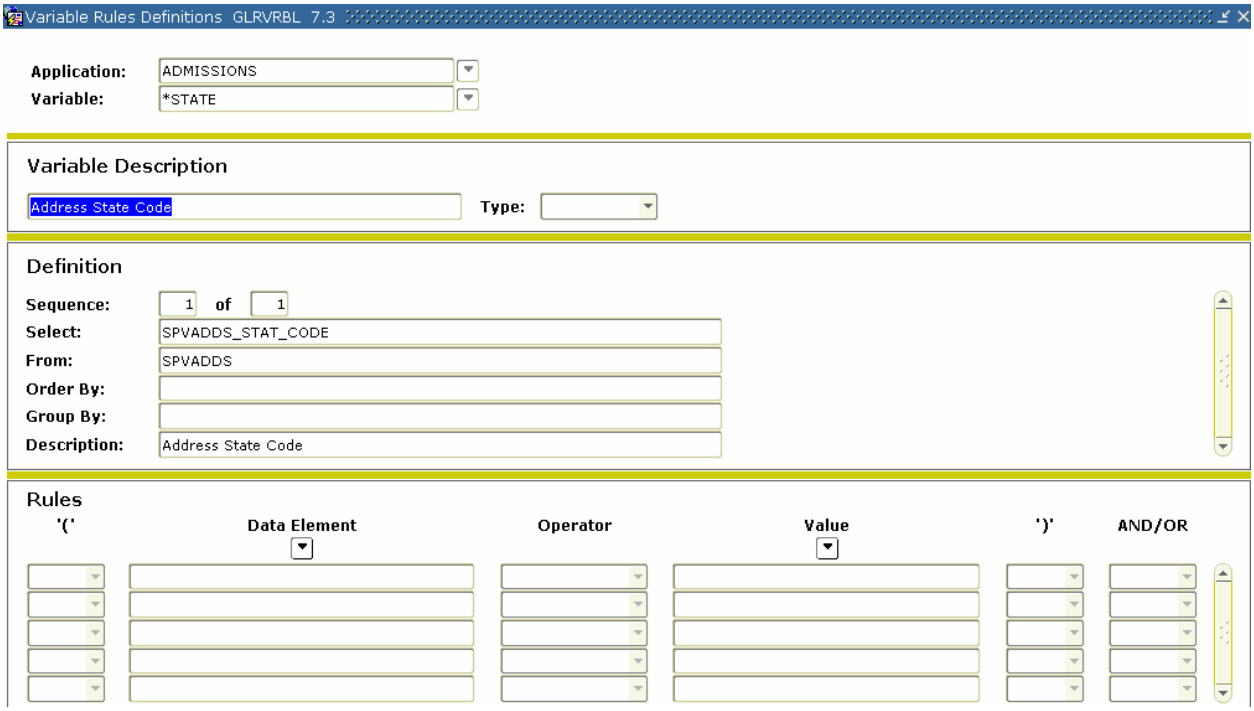
Section B: Set Up

Lesson: Defining Single Variable Rules Using Several Data Elements

Jump to TOC

Introduction

You will use the Variable Rules Definition Form (GLRVRBL) in the procedure that follows.



Procedure

You have determined that you need to use the full name in some letters. You know the name of the table and where this data is stored. Follow these steps to complete the process.

Step	Action
1	Access the Variable Rules Definition Form (GLRVRBL).
2	Enter a name for your variable in the **Variable** field. Remember to start your variable name with an asterisk (*). Note: Use the variable name **NAME_FULL_W_PREFIX*.
3	Enter a description for your variable in the Description field. Note: This field is limited to 30 characters including spaces.

Section B: Set Up

Lesson: Defining Single Variable Rules Using Several Data Elements (Continued)

Jump to TOC

Procedure, continued

4	Leave the Type field empty because your variable is not a special variable type.
5	Perform a **Next Block** function.
6	Enter the following in the **Select** field In the Definition block: SPBPERS_NAME_PREFIX||' '||SPVADDS_FIRST_NAME||' '||SPVADDS_LAST_NAME||', '||SPBPERS_NAME_SUFFIX Note: Enter this line of rules on one line. There are spaces between the single quotes (' ') and, on the third line, after the comma (,) where the lines break. You are using SPVADDS for the first and last names so that you retrieve only the current name.
7	Navigate to the **From** field.
8	Enter *SPBPERS.*
9	Enter a description for this variable. Example: *Name Prefix.*
10	Click the **Save** icon.
11	Click the **Exit** icon. Note: See the previous lesson for messages that may display. Note: If you are creating an actual select statement, you also need to specify that the PIDM in SPBPERS equal the PIDM in SPVADDS. However, unless you specify that your variable is type M (requiring manual PIDM joins), the system creates the required PIDM join statements for you when the variable is compiled.

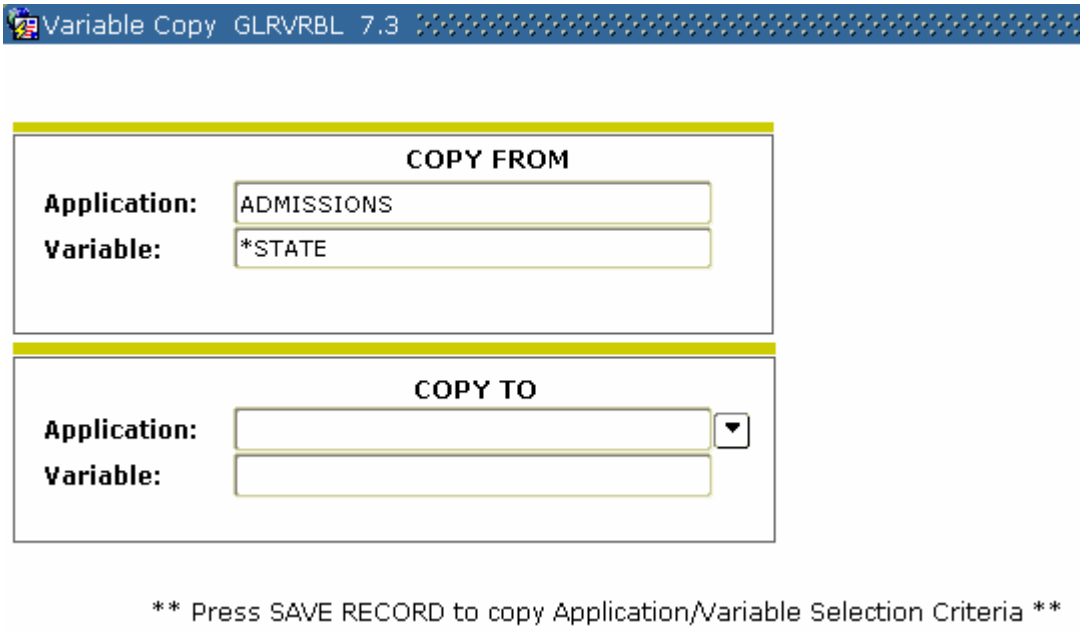
Section B: Set Up

Lesson: Copying the Rules From an Existing Variable to a New One

Jump to TOC

Introduction

You will use the Variable Rules Definition Form (GLRVRBL) to copy the rules from an existing variable to a new one.



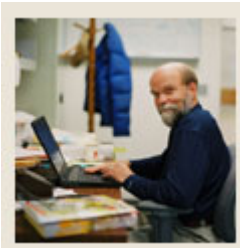
Scenario

You determine that you need to use the first name in some letters. You have researched this data element and know that it already is defined within the application Admissions.

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Variable Rules Definition Form (GLRVRBL).
2	Enter the code for *Admission* in the **Application** field.
3	Review the list of variables defined within the application. Select the variable **FNAME*. Note: You will copy the rules for the variable *FNAME to the application you created and defined in the previous exercises.
4	Select the Copy Variable option from the Options menu.



Section B: Set Up

Lesson: Copying the Rules From an Existing Variable to a New One (Continued)

Jump to TOC

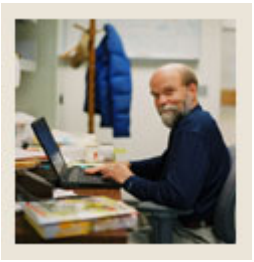
Procedure, continued

5	Enter the application code you created in the **Application** field of the Copy To block, or select it from the List of Values.
6	Enter the new variable name in the **Variable** field. Note: Remember to put an asterisk at the beginning.
7	Click the **Save** icon. Note: You 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.
11	Copy all of the variables used in your sample letter from the application Admissions to your personal application. Note: Don't forget to save each time you copy or the new variable does not compile. All saved variables will be compiled at one time when you exit.

Variables

Use these variables.

*NAME_PREFIX	*STATE
*MNAME	*ZIPC
*LNAME	*NATN
*NAME_SUFFIX	*PNAM
*STR1	*GENDER
*STR2	*ID
*STR3	*MRTL
*CITY	

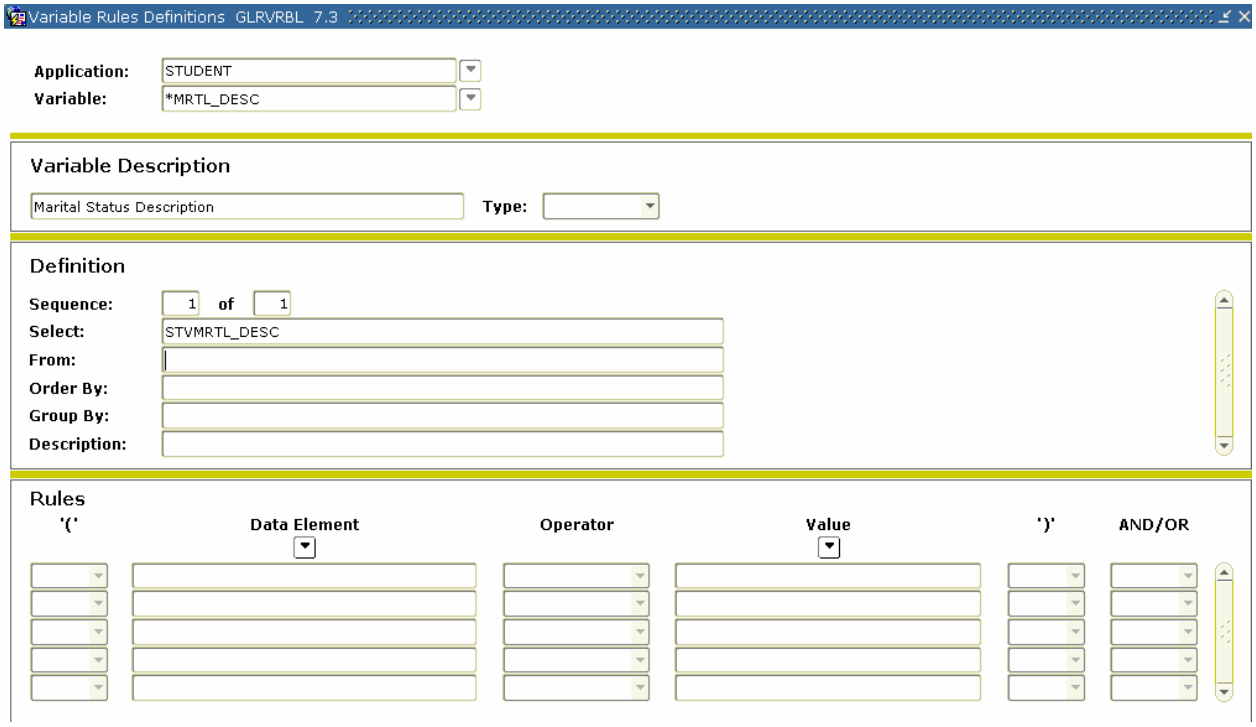


Section B: Set Up

Lesson: Creating a Variable Using a Join

Banner form

This time you need to use the marital status description in some letters. You have researched this data element and know that the code for a person's marital status is stored in the table SPBPERS but that the description is stored in the table STVMRTL.



Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Variable Rules Definition Form (GLRVRBL).
2	Enter your application in the **Application** field. Note: Make sure that the application code represents your personal application.
3	Enter **MRTL_DESC* in the **Variable** field to create a new variable code for marital status.
4	Perform a **Next Block** function.
5	Enter *Marital Status Description* in the **Description** field.
6	Perform a **Next Block** function.
7	Enter *STVMRTL_DESC* in the **Select** field of the Definition block.

Procedure, continued

Step	Action
8	Enter *STVMRTL, SPBPERS* in the **From** field. Note: You must list all tables that are referenced in the **From** field.
9	Enter a description for this line of your variable in the **Description** field. Example: *Marital Status Description.*
10	Click the **Save** icon.
11	Perform a **Next Block** function.
12	Enter these values in the Rules block. **Data Element** | SPBPERS_MRTL_CODE **Operator** | = **Value** | STVMRTL_CODE
13	Leave all other fields empty.
14	Click the **Save** icon.
15	Click the **Exit** icon. Note: Your join was defined in the Rules block. Your rule stated that the marital status description you wanted was the description of the code for the person. In this case, you are required to perform the join because only PIDM joins are performed automatically. Result: 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: Self Check

Jump to TOC

Directions

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

Question 1

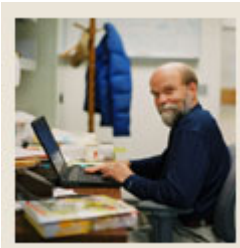
How many characters can be used when creating paragraph codes?

Question 2

Is a comment required to create a paragraph?

Question 3

On what form would you define a variable?



Section B: Set Up

Lesson: Answer Key for Self Check

Jump to TOC

Question 1

How many characters can be used when creating paragraph codes?

Up to seven characters can be used to create a paragraph code.

Question 2

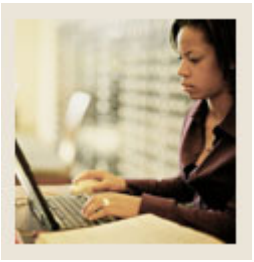
Is a comment required to create a paragraph?

No, a comment is not required. However, it should be used to describe what is in your paragraph. The comment can be 240 characters in length.

Question 3

On what form would you define a variable?

A variable is defined on the Variable Rules Definition Form (GLRVRBL).



Section C: Day-to-Day Operations

Lesson: Overview

Jump to TOC

Purpose

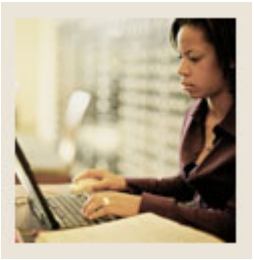
The purpose of this section is to explain the day-to-day or operational procedures to generate bulk letters printed from Banner.

Objectives

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

- create the structure of your letter
- extract the population you have identified
- generate the letter
- print the letter.

Section contents



Section C: Day-to-Day Operations

Lesson: Process Introduction

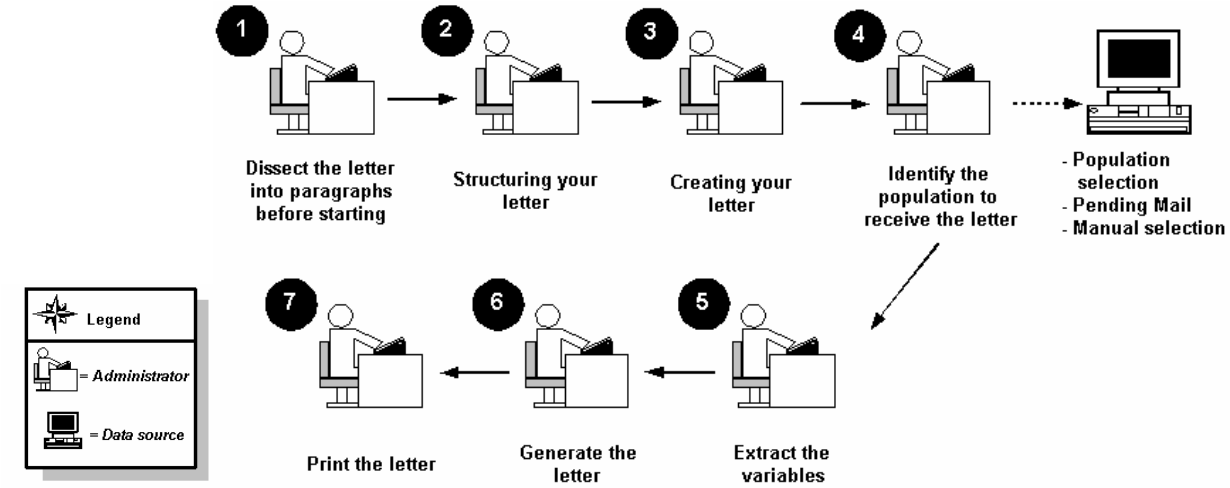
Jump to TOC

About the process

Initially when you are creating letters and paragraphs, you will structure your letter and create your paragraphs to attach to your letter.

Once this has been accomplished, when you need letters created, you will start with step 4 (identify the population to receive the letter).

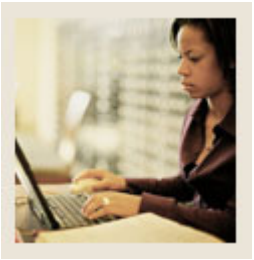
Process diagram



What happens

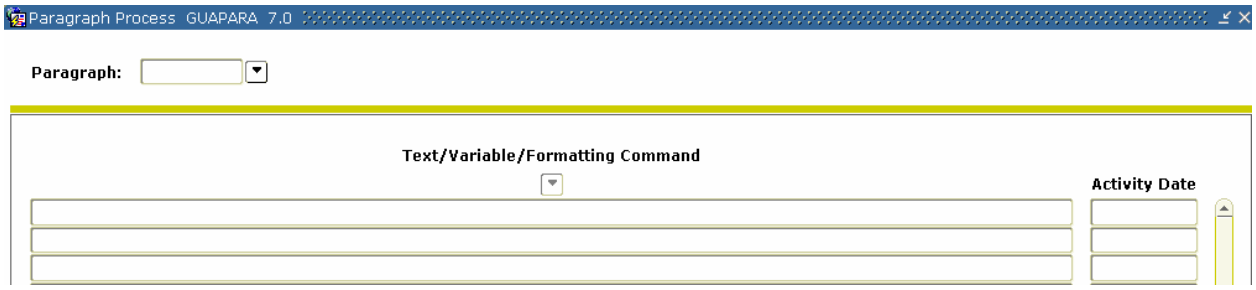
The stages of the process are described in this table.

Stage	Description
	Administrator
1	Dissect the letter into paragraphs.
2	Lay out the structure of your letter.
3	Create your letter using rule and validation forms.
4	Identify the population you wish to select for your letter using Population Selection, Pending Mail, or Manual Selection.
5	Extract the variables.
6	Generate your letter.
7	Send your letter to the printer.



Banner form

The Paragraph Form (GUAPARA) is used 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.



About the letters

All letters have two separate paragraphs that indicate a new page and the table definitions.

We are using system delivered paragraphs for our exercise.

- Newpage (New Page) contains only one line with the formatting command #NP.
- TB_RECR (Table Definitions) contains a line for each paragraph number defining the table settings. Table definitions are standard RPF commands. Table definitions include a table number and the boundaries of each column in the letter. Paragraphs 1, 2, and 3 of your letter might be defined like this:

  #T 1 40 75#
  #T 2 10 75#
  #DT 3 38 65#

Note: Variables that contain no data are suppressed if using Banner print functions. Microsoft Word, for example, will remove the space from a null variable. In the example below, if there is an address line #2 or #3 for the person, the City, State, Zip will move up.

Printed paragraph example

The paragraph you define will look as follows when printed:

Today's Date

Mr. James Quick (your name)
Street Address Line 1
Street Address Line #2
Street Address Line #3
City, State, Zip Code

Dear James,

(Text would go here.)

Procedure

Follow these steps to define the contents of the paragraph you created previously.

Step	Action
1	Access the Paragraph Form (GUAPARA).
2	Use the combination of text, variable inserts, and formatting commands found in the table that follows. Note: The cursor does not advance to the next line if an invalid variable is entered. Note: If you plan to download data to support your word processing needs see the topic, *Using the Letter Generation Print Report.* Example: When you see *XX*, XX = your initials.

Fields: printed letter

These fields are used when defining a printed letter.

Field Name	Description	Value
Paragraph	Enter a paragraph code (up to 7 characters)	XX_IA (XX = your initials)
Text/Variable/Formatting Command	Enter the combination of text, variables, and formatting commands for the contents of your paragraph (up to 60 characters each line). Note: There is a space after CONCAT and before the comma (,) in each instance.	#T 1 *XX_DATE #S 2 ^IF NULL *XX_PFX &NOPREFIX *XX_PFX &NOPREFIX *XX_FNAM ^IF NULL *XX_MI &NOMNAME *XX_MI &NOMNAME *XX_LNAM #N *XX_ADD1 #N *XX_ADD2 #N *XX_ADD3 #N *XX_CITY #CONCAT , *XX_STAT *XX_ZIP #S 2 Dear *FNAME #S2 #TE
Activity Date	System generated	[today's date]

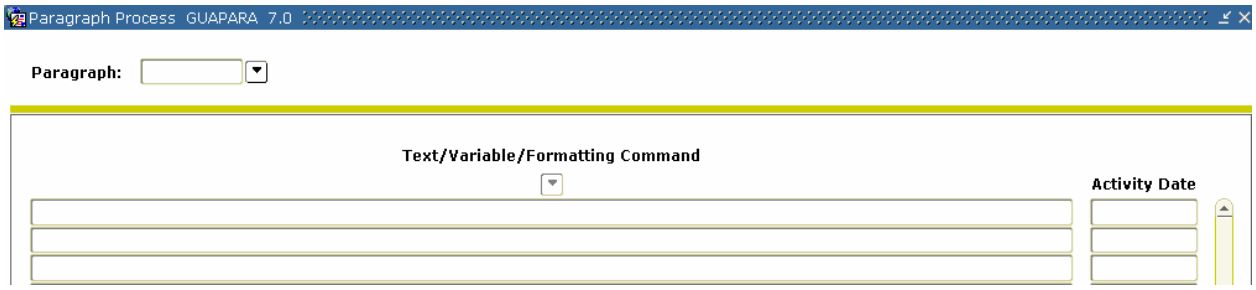
Section C: Day-to-Day Operations

Lesson: Reviewing and Changing the Contents of a Paragraph

Jump to TOC

Banner form

The Paragraph Form (GUAPARA) is used 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.



Scenario

After printing a sample copy of the letter you plan to send, you realize that you did not include the nation in the address format. You need to change the paragraph to include the variable for nation.

Procedure

Follow these steps to make the changes.

Step	Action
1	Access the Paragraph Form (GUAPARA).
2	Enter the paragraph code created in the previous lesson in the **Paragraph** field.
3	Click the **Insert Record** icon. Note: For generated letters, the nation code needs to be inserted in the proper sequence in the commands as shown below.
4	Insert another new line to add the nation code variable.
5	Click the **Save** icon.
6	Click the **Exit** icon.

Fields

These fields are used when modifying the printed letter.

Field Name	Description	Value
Paragraph	Define a paragraph code (up to 7 characters)	XX_P1 (XX = your initials)
Text/Variable/Formatting Command	Enter the combination of text, variables, and formatting commands for the contents of your paragraph (up to 60 characters)	… *XX_ZIP #N *XX_NATN #S 2 …
Activity Date	System generated	[today's date]

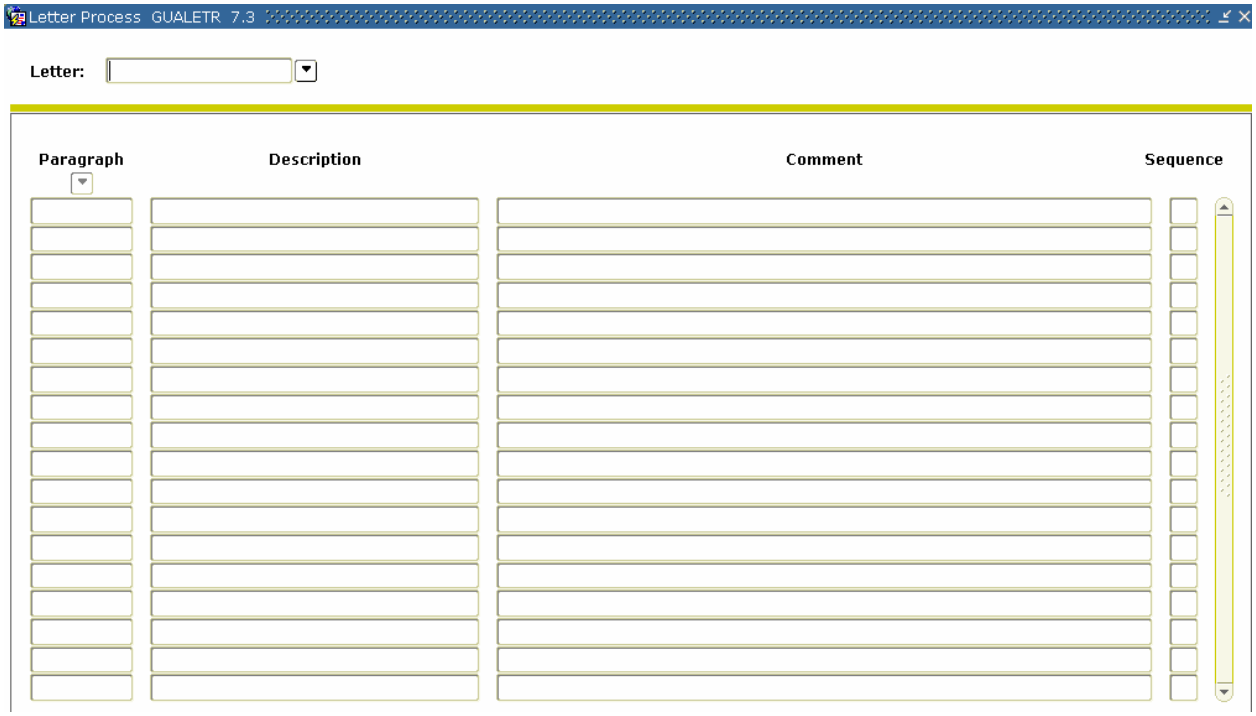
Section C: Day-to-Day Operations

Lesson: Creating a Letter by Adding Paragraphs

Jump to TOC

Banner form

You will use the Letter Process Form (GUALETR) to build a letter from paragraphs created on the Paragraph Form (GUAPARA).



Discussion

You finished defining the individual paragraphs for the post conversion verification letter and defining a code for the letter. You are ready to define the contents of the letter.

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Letter Process Form (GUALETR).
2	Enter values found in the table that follows for a printed letter.
3	Click the **Save** icon.
4	Click the **Exit** icon.

Fields: printed letter

These fields are used when adding paragraphs to a printed letter.

Field Name	Description	Value
Letter	15 character code Define a letter code	XX_ LETR (XX = your initials)
Paragraph	7 character code List the paragraph codes *TB_RECR* *NEWPAGE* *XX_IA* *For the body, select from the following:* *Alumni = DUE_ACK* *FA = TRACK* *Student = ACCEPT* *CLOSING*	TB_RECR NEWPAGE XX_IA (DUE_ACK OR TRACK OR ACCEPT CLOSING)
Description	30 character description System populated	[my] paragraph code
Sequence	5 digit number Sequence number for paragraph to appear in letter	1 2 3 4 5

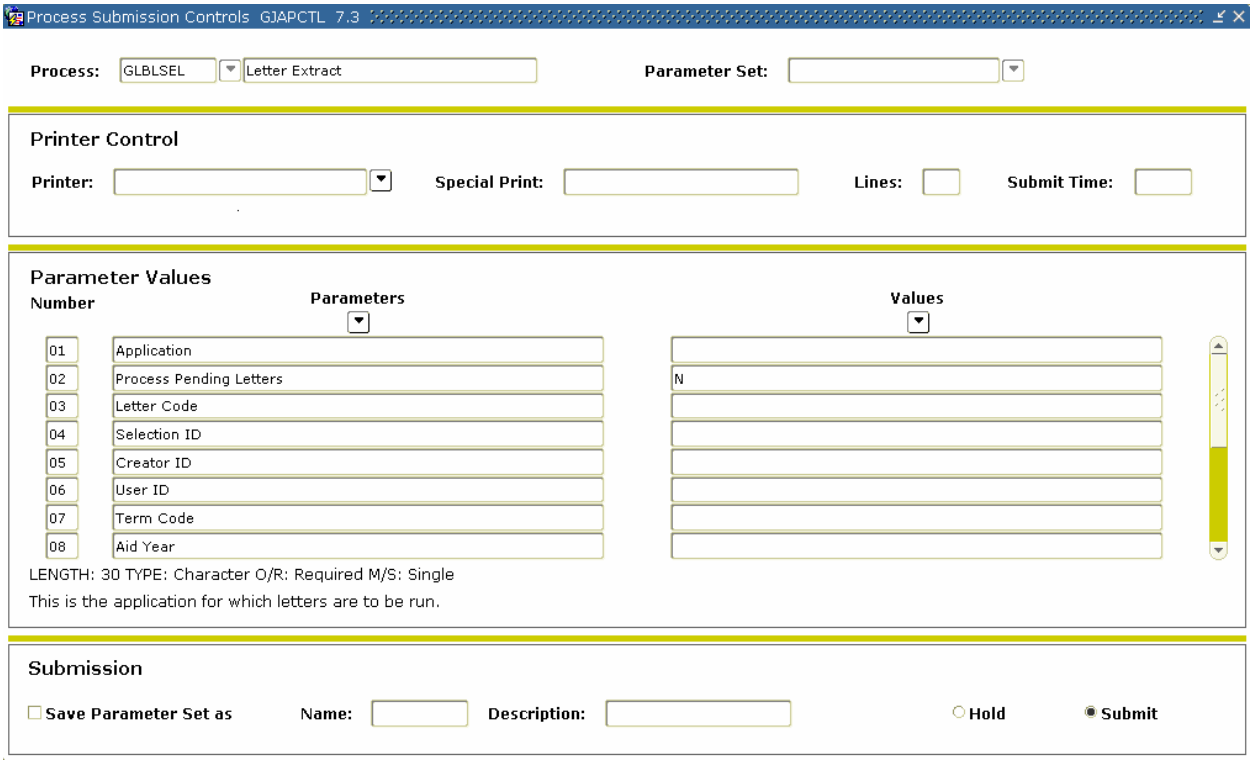
Section C: Day-to-Day Operations

Lesson: Using the Letter Extract Process

Jump to TOC

Banner process

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. This form will also inform users if a letter cannot be created because the ID did not match the selection or address criteria. The log file will list the names and ID's for those who did not receive the letter because of the missing address or because other non-address selection criteria was not met.



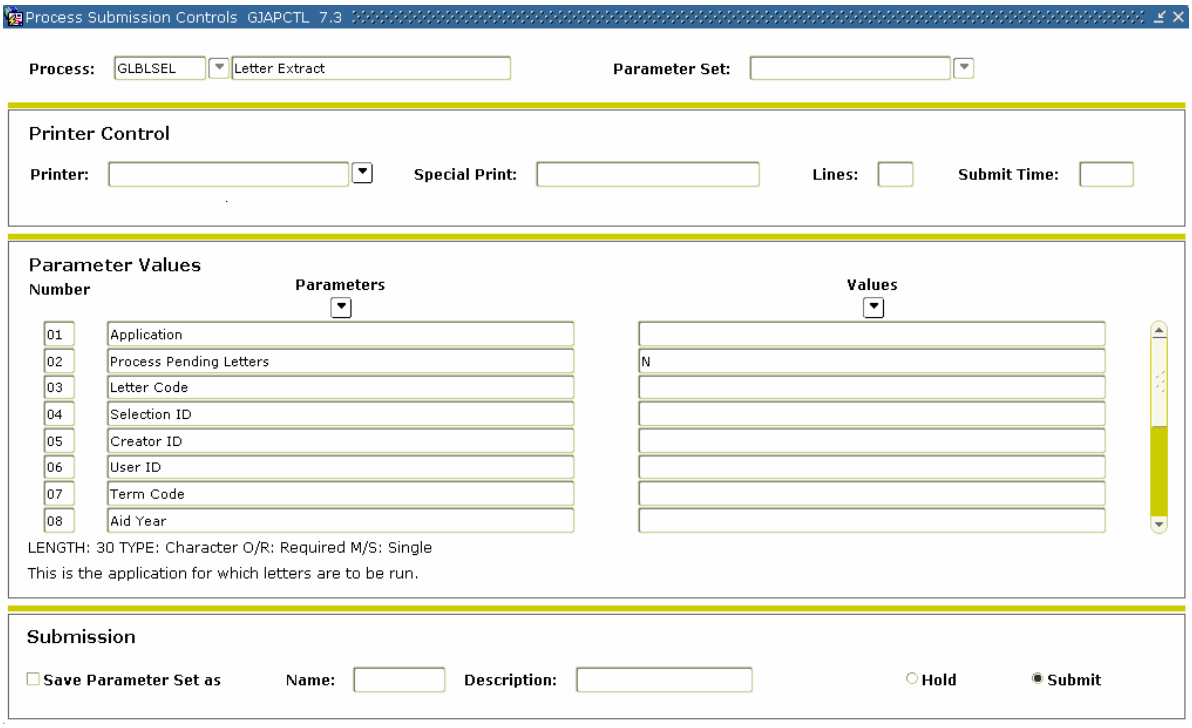
Section C: Day-to-Day Operations

Lesson: Using the Letter Extract Process (Continued)

Jump to TOC

Overview

You finished setting up your letter. It is time to produce your letters. The Letter Extract Process (GLBLSEL) extracts the data as specified in the variables that are in the requested letter. The extracted data is inserted into the Letter Collector Table (GLRCOLR).



Parameters

These parameters are needed for the procedure that follows, Parameters Values block.

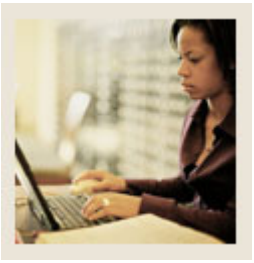
Req?	Parameter	Description
✓	**01 Application**	Select List of Values to find your application. James Quick would select *JCQ_APPLICATION*.
✓	**02 Process Pending Letters**	*N* is the default. *N* only processes a specific letter. *Y* produces all pending letters for the letter code entered in the next parameter. Procedurally, pending letters should be printed for only a specific letter code. If you select *Y*, you cannot use the Population Selection parameters.

Parameters, continued

Req?	Parameter	Description
✓	**03 Letter Code**	James Quick would enter *JQ_LETR*.
	04 Selection ID	Letters are produced from this Population Selection. You cannot use a Population Selection if you selected *Y* in parameter 02 Process Pending Letters.
	05 Creator ID	Required only if using a Population Selection. This is the ID of the person who created the Population Selection ID.
	06 User ID	Required only if using a Population Selection. It is the user ID of the person who ran GLBDATA to create the Population Selection.
	07 Term Code	Student System only. Required only when extracting Pending Student System letters (when parameter 02 = *Y*). One term can be processed per run.
	08 Aid Year	Financial Aid System only. Required for those letters that are pending for the aid year specified. Only one aid year is extracted per run.
	09 Address Selection Date	Enter the address date for which the address of choice must be effective. If no date is entered, the current date is used. If you want to use a value other than the system date, you can enter a not-null value on GJAPCTL.

Procedure, continued

Req?	Parameter	Description
✓	**10 Address Type**	The address selection is a three-character field. The first character is the priority of the address and the remaining two characters are the address type from the Address Type Code Validation Form (STVATYP). Example: 1MA, 2PR, 3SE In this example, the mailing address (MA) is the first choice and the permanent address (PR) is the second choice. Each type must be entered on a separate line. Use the Insert Record function to create a new line. Enter parameter number 10 and the description defaults. Enter the new address type in the Values field.
	11 Detailed Error Report	Valid values are *Y* or *N*.
	12 Detailed Execution Report	Valid values are *Y* or *N*.



Procedure

Follow these steps to run the Letter Extract Process (GLBSEL).

Step	Action
1	Access the Letter Extract Process (GLBLSEL).
2	Navigate to the Printer Control block and select the printer that you are using.
3	Navigate to the Parameter Values block and enter the parameters for the job submission. Use the table on the previous pages.
4	Navigate to the Submission block.
5	Select the **Submit** radio button, if necessary.
6	Click the **Save** icon. Note: Note the number in the auto hint line after saving.
7	Review the output by selecting Review Output from the **Options** menu. Note: Use the number you noted in the previous step to review the output of the GLBSEL run. By reviewing the output, you can see the IDs that did not have addresses and will not have letters created for them.
8	Click the **Exit** icon.

Section C: Day-to-Day Operations

Lesson: Using the Letter Generation Print Report

Jump to TOC

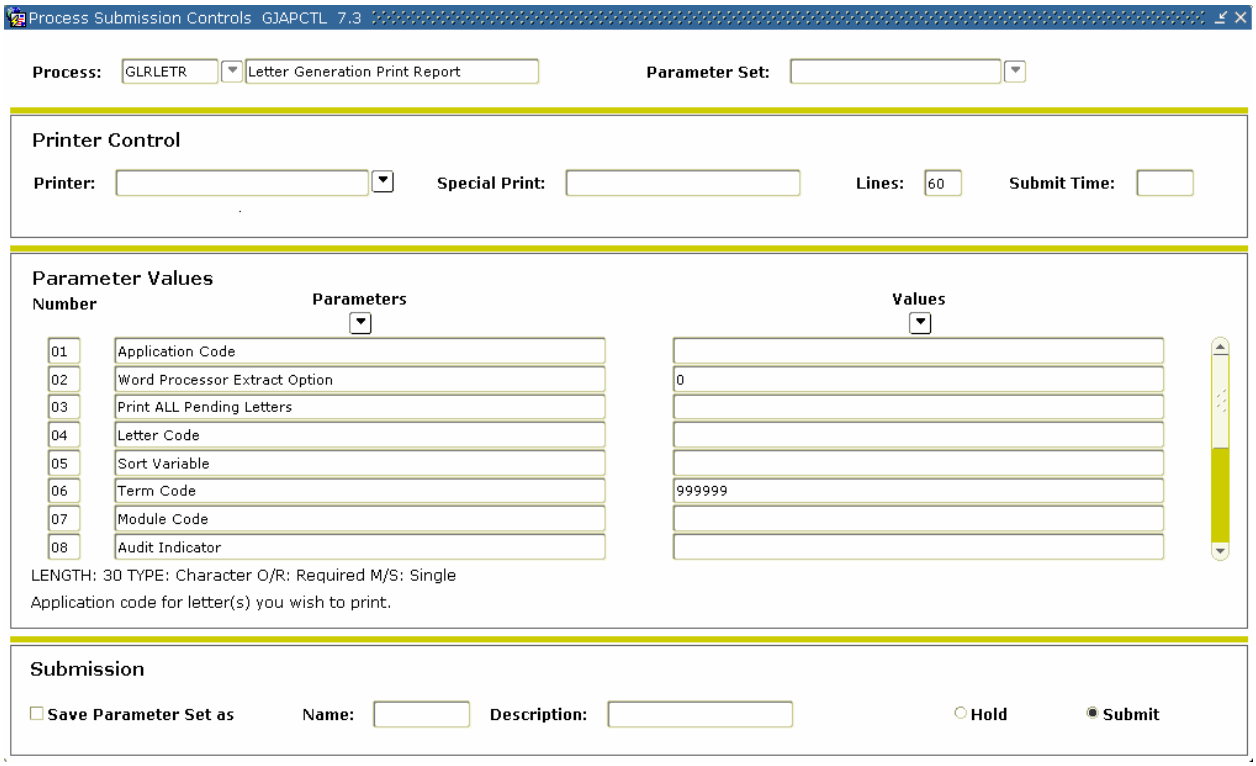
Introduction

After you have run the Letter Generation Extract Process (GLBLSEL), the Letter Generation Print Report (GLRLETR) should be executed.

You may

- generate either letters or a file that can be downloaded to Word or WordPerfect
- print a summary report
- update the General Mail Table (GURMAIL).

The Letter Generation Print Report (GLRLETR) is used for printing or downloading a letter. GLRLETR reads the results of the extract process (GLBLSEL) and combines the results with the format of the letter as defined in GUALETR to create the printed material or extract file.



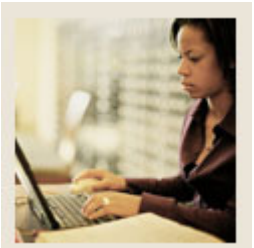
Parameters

These parameters are needed for the procedure that follows, Parameters Values block.

Req?	Parameter	Description
✓	**01 Application Code**	Select the List of Values to find your application.
✓	**02 Word Process Extract Option**	Enter the number corresponding to the extract needed: • *0* – Banner "printed" letter (default) • *1* – Microsoft Word "download" file • *2* – WordPerfect "download" file Choosing 1 or 2 produces an output file that contains a header record containing all of the variables that are used in the letter and the records for each ID in the population separated by commas. The name of the file that is produced is the name of the letter with the extension.*doc*. Example: James Quick's letter would be *JQ_LETR.doc*.
✓	**03 Print ALL Pending Letters**	Enter *Y* to print all pending letters for the application code. Note: When running GLBLSEL from the operating system *only*, you can process *all* pending letters in a single application. When running from job submission, you will be able to print only a single letter code for each run. Enter *N* to print a specific letter. The default value is *N*.
	04 Letter Code	Enter the letter code of the letter to be printed.

Procedure, continued

Req?	Parameter	Description
	05 Sort Variable	To sort the printed letters in a specific order, enter the name of a variable that determines the order. The sort variable must be contained in the letter. Note: If using the download option, this parameter will be left blank.
✓	**06 Term Code**	Required for the Student System only. All other systems use the default value of 999999.
✓	**07 Module Code**	Enter the one character module code associated with the letter being produced. This code updates the print date of published materials in the mail table that matches the module code entered and produces a list of the recipients and their materials in the report control information. Published materials are items that are sent to individuals but are not printed by Banner Letter Generation, such as college catalogs, sports brochures, and preprinted forms. A Admissions B Billing C Constituent G Gifts/Pledges F Registration H History R Recruiting



Parameters, continued

Req?	Parameter	Description
	08 Audit Indicator	Enter *Y* to run in audit mode. One sample letter is produced for each letter code extracted. No updates are done. Enter *N* to produce letters and a summary report. It updates the print dates for the generated letters existing on the Mail Query Form (GUIMAIL) or creates a new entry. It also deletes all the data in the Letter Collector Table (GLRCOLR) for the letters selected to print (this is only used when parameter 02 is zero).
	09 Free Format Date 1	Used only for producing letters via Banner. It is not used if you are performing an extract for Microsoft Word or WordPerfect. Enter a free formatted date to be printed on the requested letter for variable *DATE1. *DATE1 can be a variable on a letter that has not been built on the Variable Rules Definition Form (GLRVRBL). Its value becomes what is entered for the parameter.

Parameters, continued

Req?	Parameter	Description
	10 Free Format Date 2	Used only for producing letters via Banner. It is not used if you are performing an extract for Microsoft Word or WordPerfect. Enter a free formatted date to be printed on the requested letter for variable *DATE2. *DATE2 can be a variable on a letter that has not been built on the Variable Rules Definition Form (GLRVRBL). Its value becomes what is entered for the parameter.
	11 Free Format Date 3	Used only for producing letters via Banner. It is not used if you are performing an extract for Microsoft Word or WordPerfect. Enter a free formatted date to be printed on the requested letter for variable *DATE3. *DATE3 can be a variable on a letter that has not been built on the Variable Rules Definition Form (GLRVRBL). Its value becomes what is entered for the parameter.
	12 Aid Year Code	Required only for the Financial Aid System.

Section C: Day-to-Day Operations

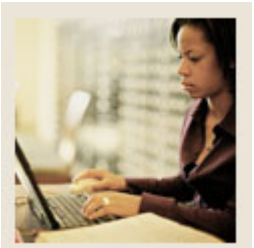
Lesson: Using the Letter Generation Print Report (Continued)

Jump to TOC

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Letter Generation Print Report (GLRLETR).
2	Navigate to the Printer block and select the printer that you are using or enter *DATABASE*. Note: You can review the output on the Saved Output Review Form (GJIREVO) where job outputs can be viewed regardless of file extension. The log file can be viewed for GLBLSEL. The log, list and doc (for mail merge) files can be viewed for GLRLETR. These files can be written to the database, if so requested, and can be displayed or saved to your local desktop machine.
3	Navigate to the Parameter Values block to enter the parameters for your job. Use the table on the previous pages.
4	Navigate to the Submission block.
5	Select the **Submit** radio button, if necessary.
6	Click the **Save** icon.
7	Click the **Exit** icon.



Section C: Day-to-Day Operations

Lesson: Summary

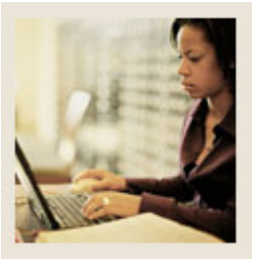
Jump to TOC

Let's review

As a result of completing this workbook, you have

- defined the contents of a paragraph
- reviewed and change the contents of a paragraph
- created a letter by adding paragraphs
- defined the rules for a single variable using several data elements
- copied the rules from an existing variable to a new one
- created a variable using a join
- generated a print report.

Now you are ready to make decisions based upon your organization's needs as to which code validation forms and control and rules forms will be used as well as the values needed on these forms.



Section C: Day-to-Day Operations

Lesson: Self Check

Jump to TOC

Directions

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

Question 1

The formatting command #CONCAT x places ‘x’ next to the preceding word without inserting a space between them.

True or False

Question 2

What does a formatting command start with?

Question 3

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

Question 4

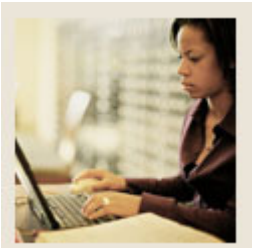
Why do you use the **Print Command** field?

Question 5

What function does the sequence number perform?

Question 6

What is the difference between using SPVADDS verses SPRIDEN?



Question 7

Can I copy a variable into the same application?

Question 8

If all tables referenced in the variable must be listed in the From field, why aren't they joined in the rules?

Question 9

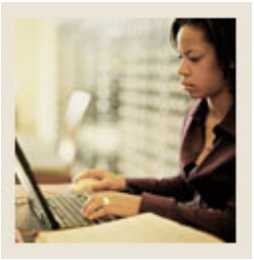
How does selecting a value in the variable sub-query work differently here than in other parts of the system?

Question 10

What is the function of the Mail Query Form (GUIMAIL)?

Question 11

The Letter blocks on what Student forms can also be used to add letters to the system?



Section C: Day-to-Day Operations

Lesson: Answer Key for Self Check

Jump to TOC

Question 1

The formatting command #CONCAT x places 'x' next to the preceding word without inserting a space between them. (True or False)

True

Question 2

What does a formatting command start with?

A formatting command always starts with the pound (#) sign.

Question 3

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

A variable always starts with an asterisk (*) and is placed in the first position of a line.

Question 4

Why do you use the **Print Command** field?

This field identifies the alternate print command for the associated letter. If you wanted to override the default print command to Portrait, you would enter PL (Print Landscape). This is for Banner generated letters only.

Question 5

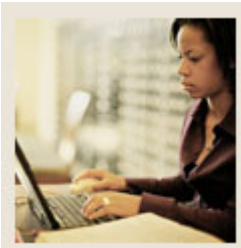
What function does the sequence number perform?

The sequence number tells Banner the order in which you would like your paragraphs printed in the letter.

Question 6

What is the difference between using SPVADDS verses SPRIDEN?

SPVADDS is a view. It is a collection of data from various tables. SPRIDEN is a table where the actual data resides.



Question 7

Can I copy a variable into the same application?

Yes, you can copy a variable into any application. However, if you copy it into the same application, rename the variable.

Question 8

If all tables referenced in the variable must be listed in the **From** field, why aren't they joined in the rules?

PIDM joins will automatically occur for the tables referenced in the From field. All other joins must be done manually in the rules.

Question 9

How does selecting a value in the variable sub-query work differently here than in other parts of the system?

Normally, when you select a value, only the actual value is returned. In this case, the value was returned, prefixed with "(*SUB" and followed by ")".

Question 10

What is the function of the Mail Query Form (GUIMAIL)?

The Mail Query Form (GUIMAIL) is used to display and maintain correspondence with a person. This is a display-only form – you can't update correspondence here. It also displays all letters associated with the person, regardless of system (i.e., Student, Alumni, Financial Aid, etc.)

Question 11

The Letter blocks on what Student forms can also be used to add letters to the system?

Admissions Form (SAAADMS)
Admission Decision Form (SAADCRV)

Section D: Downloaded Letter Set Up

Lesson: Overview

Jump to TOC

Purpose

The purpose of this section is to outline the setup process and detail the procedures to set up your Banner system to handle Letter Generation at your institution.

Objectives

At the end of this section, you will be able to create the rules, codes, and set parameters used to generate bulk letters, award letters, postcard information or labels.

Section contents

Section D: Downloaded Letter Set Up

Lesson: Rules and Validation Forms Used in Letter Generation

Jump to TOC

Introduction

Before Banner can process Letter Generation, there are several forms and rules that need to be set or created.

Rule and validation forms

These forms are used to set the rules and parameters in Banner for handling generated letters.

Form Description	Banner Name
Population Selection Definition Rules	GLRSLCT
System Indicator Validation	GTVSYSI
Application Definition Rules	GLRAPPL
Paragraph Code Validation	GTVPARA
Letter Code Validation	GTVLETR
Variable Rules Definition	GLRVRBL

Section D: Downloaded Letter Set Up

Lesson: Population Selection Definition Rules

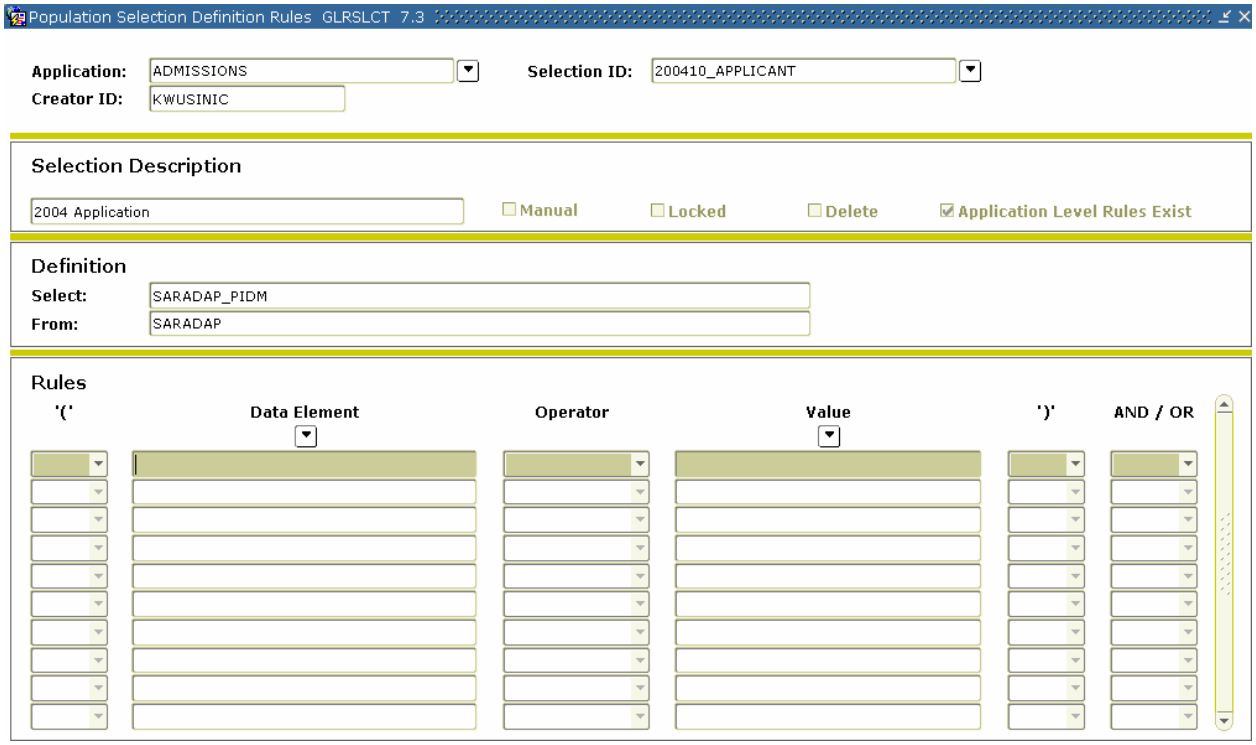
Jump to TOC

Description

The Population Selection Definition Rules Form (GLRSLCT) defines a Population Selection, which is a set of rules used to select IDs from the Banner database for reports, processes and letters.

Note: Defining a population is a prerequisite to this course.

Screen image



Section D: Downloaded Letter Set Up

Lesson: System Indicator Validation

Jump to TOC

Description

The System Indicator Validation Form (GTVSYSI) defines codes that identify the Banner applications used at your institution.

Screen image

System Indicator Validation GTVSYSI 7.0

System	Description	Activity Date
A	Alumni	27-JAN-1992
AW	Advancement Self-Service	06-JUN-2003
B	Property Tax	08-DEC-1995
C	Courts	27-JAN-1992
D	Cash Receipts	08-DEC-1995
E	Banner XtenderSolutions	02-JAN-2002
F	Finance	27-JAN-1992
FW	Finance Self-Service	04-OCT-2002
G	General	27-JAN-1992
GW	Web General	06-JUN-2003
H	Human Resources	27-JAN-1992
IC	Integration Components	21-JUL-2000
IF	Kiosk (Information Access)	30-NOV-2004
L	Occupational Tax and License	08-DEC-1995
LW	Faculty/Advisor Self-Service	10-JUN-2003
M	Micro-Faids Interface	13-FEB-1992
N	Position Control	07-NOV-1995
PW	Employee Self-Service	10-JUN-2003
R	Financial Aid	27-JAN-1992
S	Student	27-JAN-1992
SW	Student Self-Service	09-JUN-2003

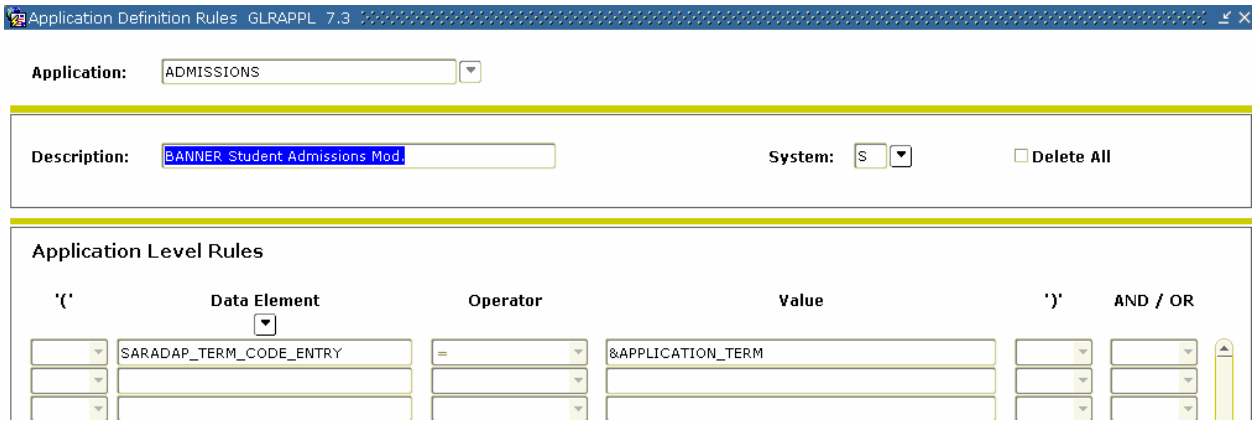
Section D: Downloaded Letter Set Up

Lesson: Creating an Application

Jump to TOC

Banner form

The Application Definition Rules Form (GLRAPPL) defines an application, which is a functional area that controls Population Selections, populations, and variables. You can use this form to create a unique application.



Procedure

You defined the letters required by your organization but would like to build them in a new application. You also have determined that you need to use the name prefix in some letters. You have researched where this data is stored in the system and you know the name of the table (SPBPERS) and the data element (SPBPERS_NAME_PREFIX). Follow these steps to complete the process.

Step	Action
1	Access the Application Inquiry Form (GLIAPPL) to review the list of applications already defined.
2	Access the Application Definition Rules Form (GLRAPPL).
3	Enter *XXX_APPLICATION* in the **Application** field. Example: XXX = your initials. Therefore, James C. Quick would enter *JCQ_APPLICATION*.
4	Perform a **Next Block** function.
	Enter [*Your Name*] *Application* in the **Description** field. Example: James Quick would enter *James Quick's Application.*

Procedure, continued

Step	Action
5	Perform a **Next Block** function.
6	Enter the code applicable to your system in the **System** field: *A* Alumni *F* Finance *G* General *H* Human Resources *R* Financial Aid *S* Student. Note: No rules need to be entered in the Application Level Rules block.
7	Click the **Save** icon.
8	Click the **Exit** icon.

Section D: Downloaded Letter Set Up

Lesson: Creating a Paragraph Code

Jump to TOC

Banner form

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

Paragraph Code Validation GTVPARA 7.0

Code	Description	Comment	Activity Date
ACCEPT	Admissions Acceptance Para	Body of the Admissions Acceptance letter	03-OCT-1991
ACK_ALL	All Acknowledgement Info	All information needed for Acknowledgement Letter Merges	28-MAR-2005
ACK_BDY	Body of Acknowledgement Letter		31-MAY-1993
ACK_DTE	Letter Date		31-MAY-1993
ACK_LIN	Line Count for Page		31-MAY-1993
ACK_NAD	Name and Address for Ack.	Person or Org Name and Address	31-MAY-1993
ACK_NPG	New Page Command		31-MAY-1993
ACK_SAL	Person/Org Salutations	Person or organization salutations for acknowledgement/receipt	01-JUN-1993
ACK_TAB	Ack tables 1-3	Gift Acknowledgement letter table definition.	29-OCT-1991
ACK_TDF	Table Definitions for Gift Ack	Gift Acknowledgement letter table definition.	31-MAY-1993
ACPT_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
AKGSIGN	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	Acknowldegemnt address name for constituent.	23-OCT-1991
ANAMESL	A/D Ack. first name salutation	Alumni Development name salutation for ackowledgements.	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 ackowledgements.	23-OCT-1991

Procedure

Follow these steps to create your first paragraph code using your initials.

Note: You can use the same paragraph for either printed letters or downloaded letters. The system will extract only variables from the paragraphs when using the download feature.

Warning: Poll the other participants in the class to prevent duplicate paragraph codes. Choose other initials if necessary.

Step	Action
1	Access the Paragraph Code Validation Form (GTVPARA).
2	Enter and execute a query to determine that the paragraph code you would like to create does not already exist.

Section D: Downloaded Letter Set Up

Lesson: Creating a Paragraph Code (Continued)

Jump to TOC

Procedure, continued

Step	Action
3	Perform an **Insert Record** function to enter a new code.
4	Enter your paragraph code in the **Code** field, starting with your initials. Example: ames Quick would create either paragraph *JQ_DLP*.
5	Enter a description for the code in the **Description** field.
6	Enter text that describes your paragraph **Comment** field.
7	Click the **Save** icon.
8	Click the **Exit** icon.

Section D: Downloaded Letter Set Up

Lesson: Creating a Letter Code

Jump to TOC

Banner form

The Letter Code Validation Form (GTVLETR) is used to define codes that identify the letters you can generate in Banner. Examples of letters include acknowledgement, applicant, and financial aid offer letters.

Letter Code Validation GTVLETR 7.0

Letter Code	Description	Allow Duplicates	Alternate Letter Code	Print Command	Activity Date
ADM_ACCT_ACCEPT	Admissions Accounting Accept	☑			12-MAY-2006
ADM_APPL_ACKN	Admissions Application Ackn	☑			20-MAY-2005
ADM_CHKL	Admissions Checklist Letter	☐			17-MAY-1995
ADM_FA_INTEREST	Financial Aid Interest Letter	☐			23-MAY-1995
ADM_INT_1	Admissions Interview 1 Letter	☐			23-MAY-1995
AD_ACK_GIFTS	Gift Acknowledgement Letter	☐			20-MAY-2005
AD_ACK_SPECIAL	Acknowledgement of Special Gif	☐	AD_ACK_TWO		10-MAY-1995
AD_ACK_TWO	Second Special Ackn of Gifts	☑			10-MAY-1995
AD_QUIK_RECPT	Quick On line Gift Receipt	☑			10-MAY-1995
AMCAS_LETTER	AMCAS Letter	☑			24-FEB-2006
AMCAS_LETTER_2	AMCAS Letter - chinese	☐			25-MAY-2005
ANNUAL_FND_ACKN	Annual Fund Gift Ackn Letter	☑			29-AUG-1991
A_CDW_LTR	CDW Letter	☐			03-MAY-2006
BILLS_TEST	Bill Zimmer's second test lett	☐			18-OCT-2004
BILLZ_TEST	Bill Zimmer's test letter	☑			17-FEB-2004
CC_TEST_APP	CC test App	☑			06-MAR-2006
CC_TEST_APP2	CC test App	☑			27-MAR-2006
CC_TEST_APP3	CC test App	☑			27-MAR-2006
CC_TEST_RECRUI2	CC test Recruit	☑			27-MAR-2006
CC_TEST_RECRUI3	CC test Recruit	☑			27-MAR-2006
CC_TEST_RECRUIT	CC test Recruit	☑			06-MAR-2006
CC_TEST_STUDEN2	CC test Student	☑			27-MAR-2006

Procedure

Follow these steps to create the letter code.

Step	Action
1	Access the Letter Code Validation Form (GTVLETR).
2	0 Enter and execute a query to ensure that the letter code you intend to create does not already exist. Note: Search for the code XX_ DLP.
3	Click the **Insert Record** icon.

Section D: Downloaded Letter Set Up

Lesson: Creating a Letter Code (Continued)

Jump to TOC

Procedure, continued

Step	Action
4	Enter the name of your letter in the **Letter Code** field. Example: James Quick would enter *JQ_DLP*.
5	Enter a name for your letter in the **Description** field, using your name in the text. Example: James Quick would enter *James Quick's Download Letter*.
6	Leave the **Allow Duplicates** checkbox empty. Checking this box will allow duplicates of this letter to be requested or produced for a person. Note: If the **Allow Duplicates** checkbox is empty, you may enter an alternate letter code. The alternate letter code will be created for a person if they are selected to receive a duplicate letter via the Dues Acknowledgement Process (AAPACKN) or the Pledge Gift Acknowledgement Process (AGPACKN), or if they have already received the letter in the primary key field. Note: If the **Allow Duplicates** checkbox is empty and the **Alternate Letter Code** field is empty, no letter is generated for an ID selected to receive a duplicate letter.
7	Click the **Save** icon
8	Click the **Exit** icon

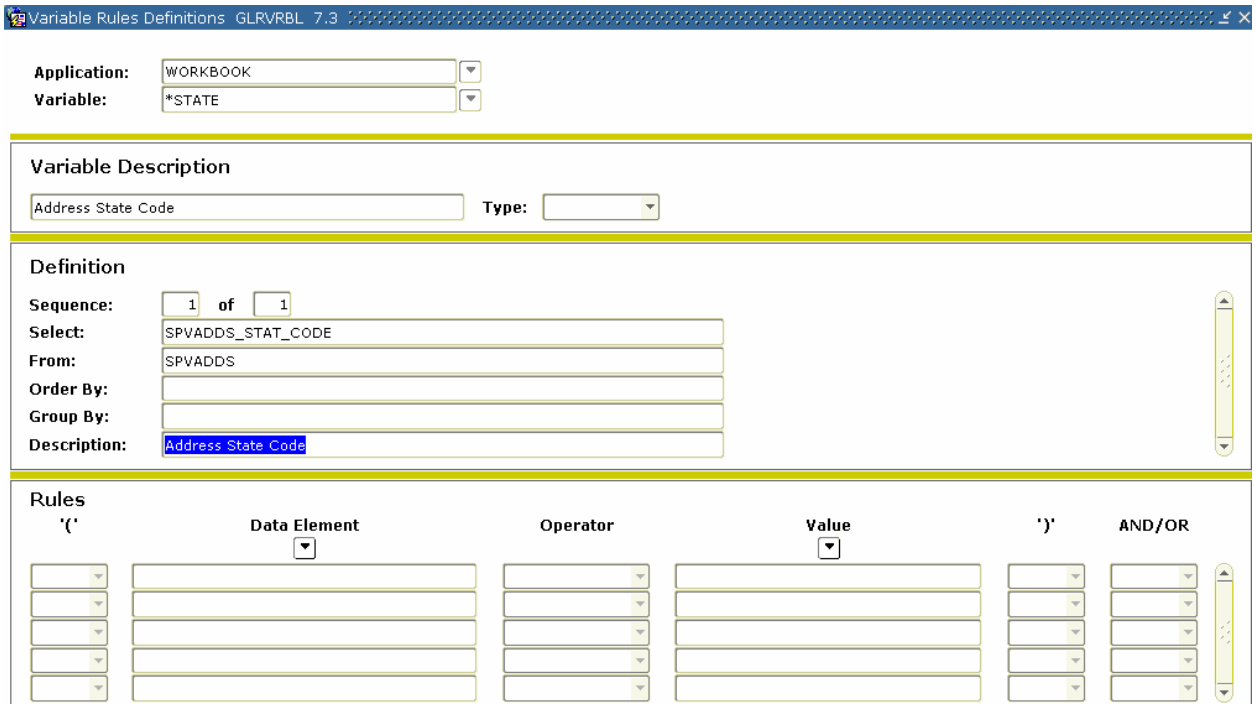
Section D: Downloaded Letter Set Up

Lesson: Creating Simple Variable Rules

Jump to TOC

Banner form

The Variable Rules Definition Form (GLRVRBL) is used to define, maintain, and copy a variable. A variable is a specific piece of data in the database and the set of rules used to select that data. Variables are used to insert variable data into letters and reference subqueries in application rules, population selection rules, and variable rules.



Variables

A variable is a specific piece of data in the database and the set of rules used to select that data. Variables are used to insert variable data into letters and reference subqueries in application rules, population selection rules, and variable rules. Any data element associated with an ID can be defined as a variable.

Procedure

Follow these steps to create a variable.

Step	Action
1	Access the Variable Rules Definition Form (GLRVRBL).
2	Enter your application name in the **Application** field.

Section D: Downloaded Letter Set Up

Lesson: Creating Simple Variable Rules (Continued)

Jump to TOC

Procedure, continued

Step	Action
3	0 Enter the name for your variable in the **Variable** field, starting with an asterisk (*). 1 Note: For easy identification, include your initials. Example: James Quick would create current ID variable *JQ_ID.
4	Perform a **Next Block** function.
5	Enter a description for your variable in the **Description** field.
6	Click the down arrow next to the **Type** field, to designate this variable as *First*, meaning the first variable to be processed by GLBLSEL. You will have to choose one variable to use as a first. We recommend your first variable to be a field that will always contain data; for example, first name or last name. Note: Depending on how you are logged into the system, the Alternate Logon Verification Form (GUAUIPW) may or may not display. If it does, enter the alternate user ID and alternate password as instructed. You are returned to the Variable Rules Definition Form.
7	Perform a **Next Block** function.
8	Enter *SPVADDS_STAT_CODE* in the **Select** field. This is the prefix column from the SPBPERS table.
9	Enter *SPVADDS* in the **From** field. This is the table name.
10	Enter *Address State Code* in the **Description** field. This is a description for the logic in the sequence. Note: No values need to be entered in the Rules block.

Section D: Downloaded Letter Set Up

Lesson: Creating Simple Variable Rules (Continued)

Jump to TOC

Procedure, continued

Step	Action
12	Click the **Save** icon.
13	Click the **Exit** icon. Note: You see the message *Performing Variable Compilation, please wait*. If your variable is compiled successfully, the form will exit automatically. Note: If your variable does not compile successfully, an error message displays. An acknowledgement is required. The Process Results Form (GJARSLT) displays and the error that caused the compilation to terminate displays along with any other previous error messages. Note: Using the steps above, create variables for the other data elements that you are using in your letter. Remember to click the **Save** icon and click the **Exit** icon after creating each variable so your variables compile successfully.

Section D: Downloaded Letter Set Up

Lesson: Creating Simple Variable Rules (Continued)

Jump to TOC

List of variables

Here is a list of variables that you may find useful as well as what you will enter in the **Select** and **From** fields in the Variable Rules Definition Form (GLRVRBL).

Note: *XX* equals the initials you chose to enter.

Variable	Select and From Fields
Today's Date: *XX_DATE	**SELECT:** RTRIM(TO_CHAR(SYSDATE,'Month')‖''‖TO_CHAR(SYSDATE,'DD,YYYY') 0 **FROM:** DUAL *Note The SELECT line should be continuous
First Name: 0 1 *XX_FNAM	0 **SELECT:** SPVADDS_FIRST_NAME 1 2 **FROM:** SPVADDS
Middle Name: 0 1 *XX_MI	3 **SELECT:** SPVADDS_MI 4 5 **FROM:** SPVADDS
Last Name: 0 1 *XX_LNAM	6 **SELECT:** SPVADDS_LAST_NAME 7 8 **FROM:** SPVADDS
Prefix: 0 1 *XX_PFX	9 **SELECT:** SPBPERS_NAME_PREFIX 10 11 **FROM:** SPBPERS
Suffix: 0 1 *XX_SUFF	12 **SELECT:** SPBPERS_NAME_SUFFIX 13 14 **FROM:** SPBPERS
2 **Address Line 1:** 3 4 *XX_ADD1	15 **SELECT:** SPVADDS_STREET_LINE1 16 17 **FROM:** SPVADDS
Address Line 2: 0 1 *XX_ADD2	18 **SELECT:** SPVADDS_STREET_LINE2 19 20 **FROM:** SPVADDS

Section D: Downloaded Letter Set Up

Lesson: Creating Simple Variable Rules (Continued)

Jump to TOC

List of variables, continued

Variable	Select and From Fields
2 Address Line 3: 3 *XX_ADD3	21 **SELECT:** SPVADDS_STREET_LINE3 22 23 **FROM:** SPVADDS
4 City: 5 *XX_CITY	24 **SELECT:** SPVADDS_CITY 25 26 **FROM:** SPVADDS
0 **State:** 1 *XX_STATE	0 **SELECT:** SPVADDS_STAT_CODE 1 2 **FROM:** SPVADDS
2 Zip: 3 *XX_ZIP	3 **SELECT:** SPVADDS_ZIP 4 5 **FROM:** SPVADDS
4 Preferred First Name: 5 *XX_PFN	6 **SELECT:** SPBPERS_PREF_FIRST_NAME 7 8 **FROM:** SPBPERS
6 Gender: 7 *XX_GEND	9 **SELECT:** SPBPERS_SEX 10 11 **FROM:** SPBPERS
8 Current ID: 9 *XX_ID (first type variable)	12 **SELECT:** SPVADDS_ID 13 **14 FROM:** SPVADDS
10 Marital Status: 11 *XX_MRTL	15 **SELECT:** SPBPERS_MRTL_CODE 16 **17 FROM:** SPBPERS
12 Nation: 13 *XX_NATN	18 **SELECT:** SPVADDS_NATN_DESC 19 **20 FROM:** SPVADDS

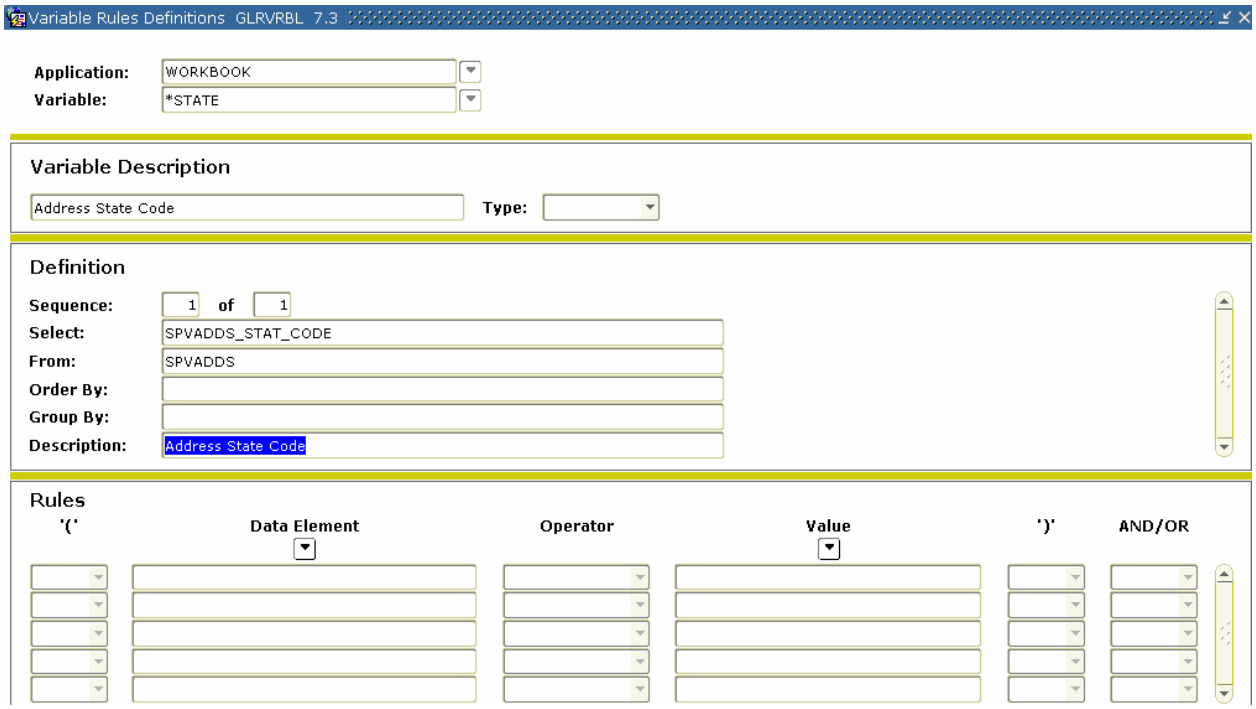
Section D: Downloaded Letter Set Up

Lesson: Defining Single Variable Rules Using Several Data Elements

Jump to TOC

Introduction

You will use the Variable Rules Definition Form (GLRVRBL) in the procedure that follows.



Section D: Downloaded Letter Set Up

Lesson: Defining Single Variable Rules Using Several Data Elements (Continued)

Jump to TOC

Procedure

You have determined that you need to use the full name in some letters. You know the name of the table and where this data is stored. Follow these steps to complete the process.

Step	Action
1	Access the Variable Rules Definition Form (GLRVRBL).
2	Enter a name for your variable in the **Variable** field. Remember to start your variable name with an asterisk (*). Note: Use the variable name **NAME_FULL_W_PREFIX*.
3	Enter a description for your variable in the **Description** field. Note: This field is limited to 30 characters including spaces.
4	Leave the **Type** field empty because your variable is not a special variable type.
5	Perform a **Next Block** function.
6	Enter the following in the **Select** field In the Definition block: SPBPERS_NAME_PREFIX||' '||SPVADDS_FIRST_NAME||' '||SPVADDS_LAST_NAME||', '||SPBPERS_NAME_SUFFIX Note: Enter this line of rules on one line. There are spaces between the single quotes (' ') and after the comma (,). You are using SPVADDS for the first and last names so that you retrieve only the current name.
7	Navigate to the **From** field.
8	Enter *SPBPERS.*
9	Enter a description for this variable. Example: *Name Prefix.*

Section D: Downloaded Letter Set Up

Lesson: Defining Single Variable Rules Using Several Data Elements (Continued)

Jump to TOC

Procedure, continued

Step	Action
10	Click the **Save** icon.
11	Click the **Exit** icon. Note: See the previous lesson for messages that may display. Note: If you are creating an actual select statement, you also need to specify that the PIDM in SPBPERS equal the PIDM in SPVADDS. However, unless you specify that your variable is type M (requiring manual PIDM joins), the system creates the required PIDM join statements for you when the variable is compiled.

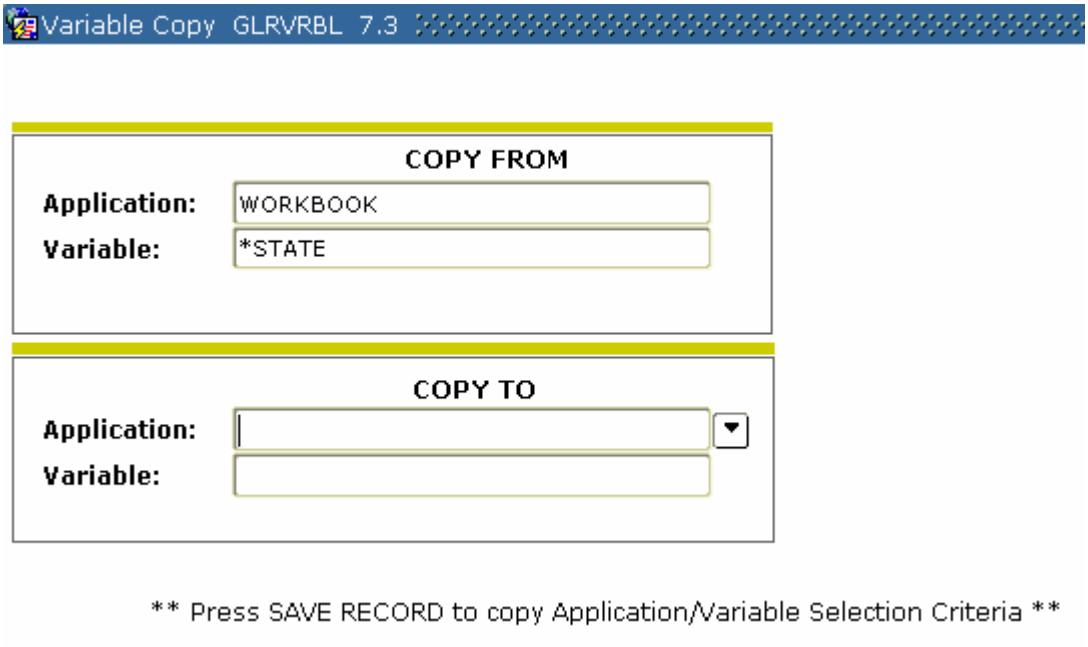
Section D: Downloaded Letter Set Up

Lesson: Copying the Rules From an Existing Variable to a New One

Jump to TOC

Introduction

You will use the Variable Rules Definition Form (GLRVRBL) to copy the rules from an existing variable to a new one.



Scenario

You determine that you need to use the first name in some letters. You have researched this data element and know that it already is defined within the application Admissions.

Section D: Downloaded Letter Set Up

Lesson: Copying the Rules From an Existing Variable to a New One (Continued)

Jump to TOC

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Variable Rules Definition Form (GLRVRBL).
2	Enter the code for *Admission.* in the **Application** field.
3	Review the list of variables defined within the application. Select the variable **FNAME*. Note: You will copy the rules for the variable FNAME to the application you created and defined in the previous exercises.
4	Select the Copy Variable option from the **Options** menu.
5	Enter the application code you created in the **Application** field of the Copy To block, or select it from the List of Values.
6	Enter the new variable name in the **Variable** field. Note: Remember to put an asterisk at the beginning.
7	Click the **Save** icon. Note: You 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.
11	Copy all of the variables used in your sample letter from the application Admissions to your personal application. Note: Don't forget to save each time you copy or the new variable does not compile. All saved variables will be compiled at one time when you exit.

Variables

Use these variables.

*NAME_PREFIX	*STATE
*MNAME	*ZIPC
*LNAME	*NATN
*NAME_SUFFIX	*PNAM
*STR1	*GENDER
*STR2	*ID
*STR3	*MRTL
*CITY	

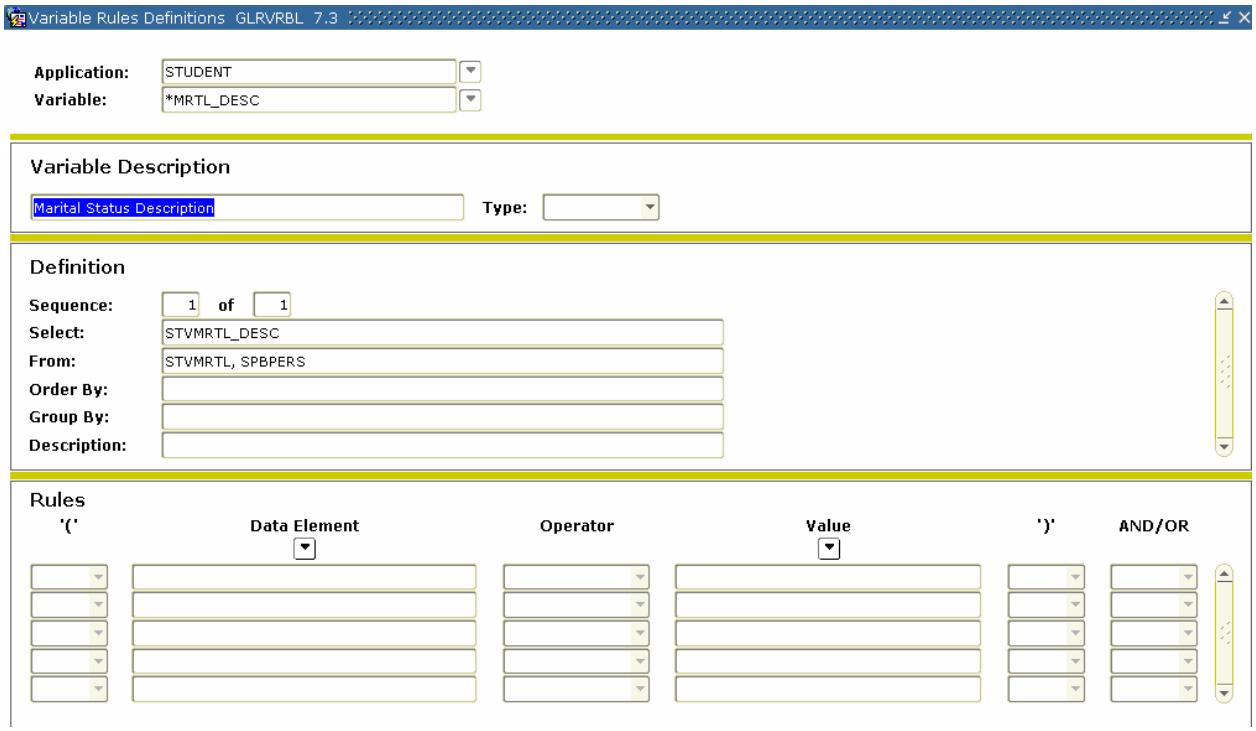
Section D: Downloaded Letter Set Up

Lesson: Creating a Variable Using a Join

Jump to TOC

Banner form

This time you need to use the marital status description in some letters. You have researched this data element and know that the code for a person's marital status is stored in the table SPBPERS but that the description is stored in the table STVMRTL.



Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Variable Rules Definition Form (GLRVRBL).
2	Enter your application in the **Application** field. Note: Make sure that the application code represents your personal application.
3	Enter **MRTL_DESC* in the **Variable** field to create a new variable code for marital status.
4	Perform a **Next Block** function.
5	Enter *Marital Status Description* in the **Description** field.
6	Perform a **Next Block** function.
7	Enter *STVMRTL_DESC* in the **Select** field of the Definition block.

Section D: Downloaded Letter Set Up

Lesson: Creating a Variable Using a Join (Continued)

Jump to TOC

Procedure, continued

Step	Action
8	Enter *STVMRTL, SPBPERS* in the **From** field. Note: You must list all tables that are referenced in the **From** field.
9	Enter a description for this line of your variable in the **Description** field. Example: *Marital Status Description.*
10	Click the **Save** icon.
11	Perform a **Next Block** function.
12	Enter these values in the Rules block. **Data Element**: SPBPERS_MRTL_CODE **Operator**: = **Value**: STVMRTL_CODE
13	Leave all other fields empty.
14	Click the **Save** icon.
15	Click the **Exit** icon. Note: Your join was defined in the Rules block. Your rule stated that the marital status description you wanted was the description of the code for the person. In this case, you are required to perform the join because only PIDM joins are performed automatically. Result: You see the message *Performing Variable Compilation, please wait*. If your variable is compiled successfully, you will exit the form automatically.

Section D: Downloaded Letter Set Up

Lesson: Self Check

Jump to TOC

Directions

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

Question 1

How many characters can be used when creating paragraph codes?

Question 2

Is a comment required to create a paragraph?

Question 3

On what form would you define a variable?

Section D: Downloaded Letter Set Up

Lesson: Answer Key for Self Check

Jump to TOC

Question 1

How many characters can be used when creating paragraph codes?

Up to seven characters can be used to create a paragraph code.

Question 2

Is a comment required to create a paragraph?

No, a comment is not required. However, it should be used to describe what is in your paragraph. The comment can be 240 characters in length.

Question 3

On what form would you define a variable?

A variable is defined on the Variable Rules Definition Form (GLRVRBL).

Section E: Downloaded Letter Day-to-Day Operations

Lesson: Overview

Jump to TOC

Purpose

The purpose of this section is to explain the day-to-day or operational procedures to generate bulk letters at your institution.

Objectives

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

- create the structure of your letter
- extract the population you have identified
- generate the letter
- print the letter.

Section contents

Section E: Downloaded Letter Day-to-Day Operations

Lesson: Process Introduction

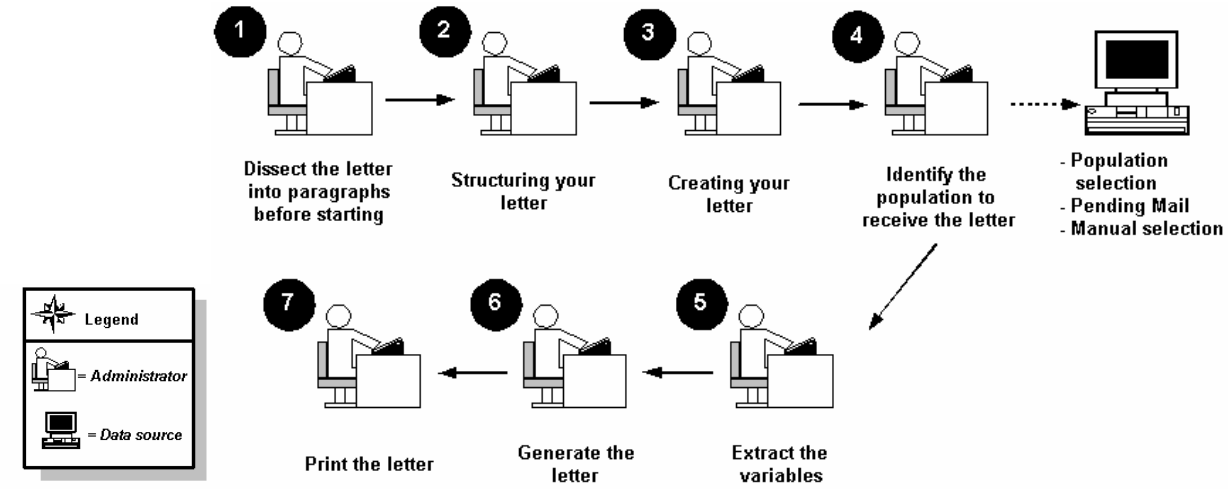
Jump to TOC

About the process

Initially when you are creating letters and paragraphs, you will structure your letter and create your paragraphs to attach to your letter.

Once this has been accomplished, when you need letters created, you will start with step 4 (identify the population to receive the letter).

Process diagram



What happens

The stages of the process are described in this table.

Stage	Description
Administrator	
1	Dissect the letter into paragraphs.
2	Lay out the structure of your letter.
3	Create your letter using rule and validation forms.
4	Identify the population you wish to select for your letter using Population Selection, Pending Mail, or Manual Selection.
5	Extract the variables.
6	Generate your letter.
7	Send your letter to the printer.

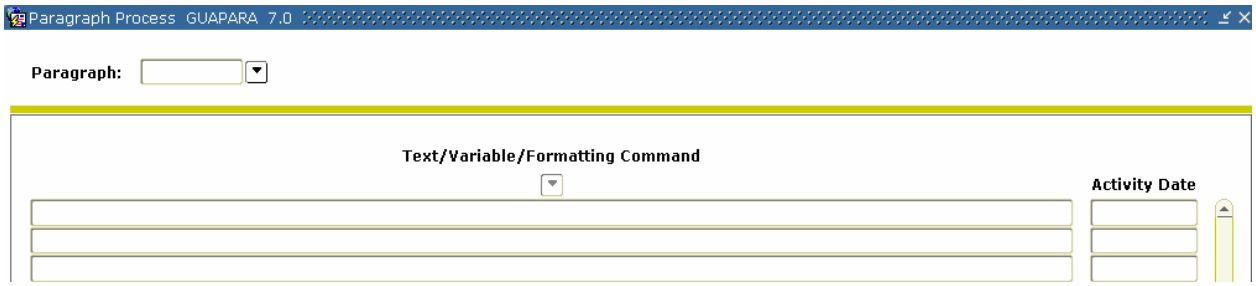
Section E: Downloaded Letter Day-to-Day Operations

Lesson: Defining the Contents of a Paragraph

Jump to TOC

Banner form

The Paragraph Form (GUAPARA) is used 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.



About the letters

All letters must have at least one paragraph defined. Additional paragraphs may be created for organizing variables to be downloaded.

Paragraph example

The paragraph you define will contain the following information:

Today's Date

Mr. James Quick (your name)
Street Address Line 1
Street Address Line #2
Street Address Line #3
City, State, Zip Code

Dear James,

(Text would go here. The text is defined in the mail merge letter of the chosen word processing application, such as Microsoft Word or Corel WordPerfect.)

Section E: Downloaded Letter Day-to-Day Operations

Lesson: Defining the Contents of a Paragraph (Continued)

Jump to TOC

Procedure

Follow these steps to define the contents of the paragraph you created previously.

Step	Action
1	Access the Paragraph Form (GUAPARA).
2	Use the variable inserts found in the table that follows. Note: The cursor does not advance to the next line if an invalid variable is entered. Note: If you plan to download data to support your word processing needs see the topic, *Using the Letter Generation Print Report.* Example: When you see *XX*, XX = your initials.

Fields: downloaded letter

These fields are used when defining a downloaded letter example.

Field Name	Description	Value
Paragraph	Enter a paragraph code (up to 7 characters)	XX_DLP (XX = your initials)
Variables	Enter only the variables for the contents of your paragraph (up to 60 characters each line) Note: XX_ID is a first type variable that will eliminate multiples. When using downloaded letters, the order of the variables in the paragraphs is not important. The variable extract into the word processing software will resequence the variables into alphabetical order.	*XX_ID *XX_PFX *XX -FNAM *XX_MI *XX_LNAM *XX_ADD1 *XX_ADD2 *XX_ADD3 *XX_CITY *XX_STAT *XX_ZIP *XX_PFN
Activity Date	System generated	[today's date]

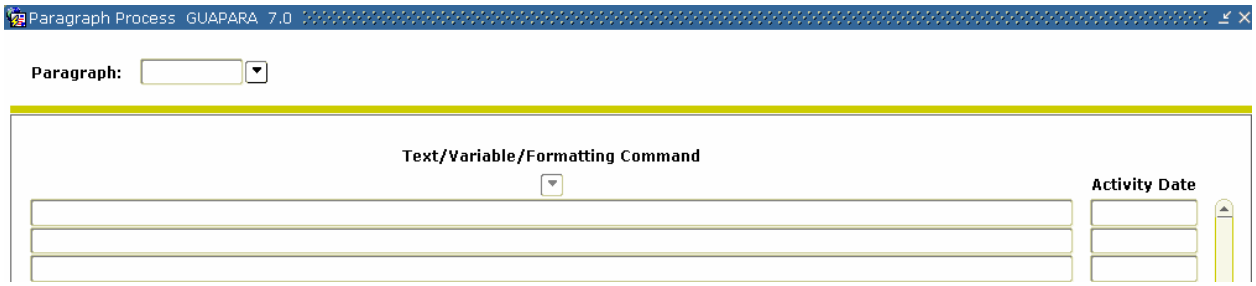
Section E: Downloaded Letter Day-to-Day Operations

Lesson: Reviewing and Changing the Contents of a Paragraph

Jump to TOC

Banner form

The Paragraph Form (GUAPARA) is used 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.



Scenario

After printing a sample copy of the letter you plan to send, you realize that you did not include the nation in the address format. You need to change the paragraph to include the variable for nation.

Procedure

Follow these steps to make the changes.

Step	Action
1	Access the Paragraph Form (GUAPARA).
2	Enter the paragraph code created in the previous lesson in the **Paragraph** field.
3	Perform a **Next Block** function.
4	Click the **Insert Record** icon.
5	Add the nation code variable.
6	Click the **Save** icon.
7	Click the **Exit** icon.

Section E: Downloaded Letter Day-to-Day Operations

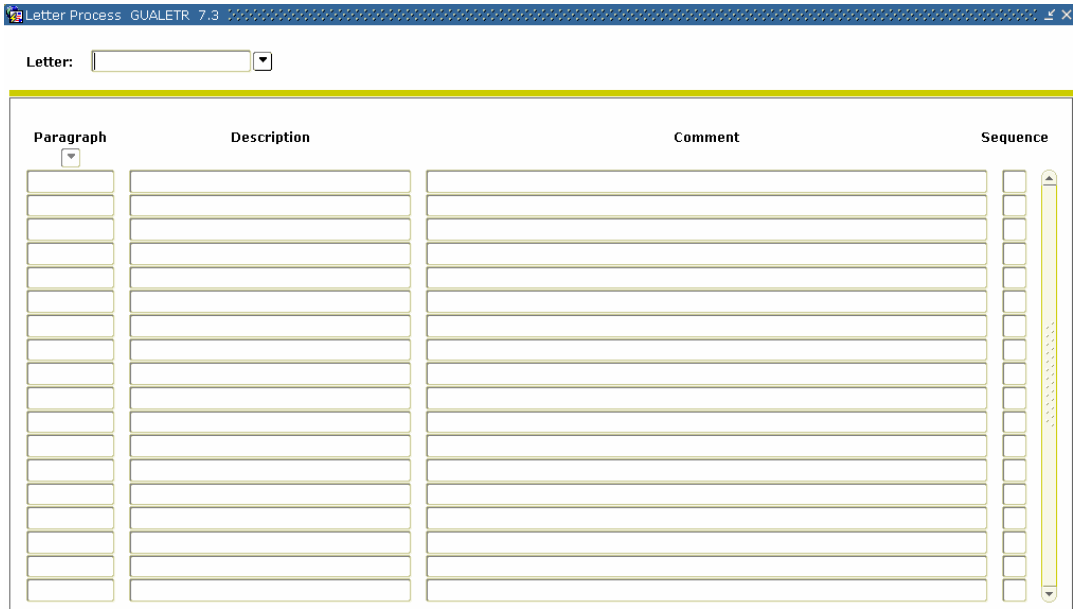
Lesson: Creating a Letter by Adding Paragraphs

Jump to TOC

Banner form

You will use the Letter Process Form (GUALETR) to build a letter from paragraphs created on the Paragraph Form (GUAPARA).

Note: If using the download option, you can create paragraphs that contain only variables. If you use paragraphs that contain formatting commands, text and variables, the download process will select only the variables.



Scenario

You finished defining the individual paragraphs for the post conversion verification letter and defining a code for the letter. You are ready to define the contents of the letter.

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Letter Process Form (GUALETR). Here you will combine your paragraph codes to form a letter.
2	Enter values found in the table that follows for a downloaded letter.
3	Click the **Save** icon.
4	Click the **Exit** icon.

Section E: Downloaded Letter Day-to-Day Operations

Lesson: Creating a Letter by Adding Paragraphs (Continued)

Jump to TOC

Fields: downloaded letter

These fields are used when adding paragraphs to a downloaded letter.

Field Name	Description	Value
Letter	Define a letter code (up to 15 characters)	XX_DLP (XX = your initials)
Paragraph	List the paragraph codes (up to 7 characters)	XX_DLP (XX = your initials)
Description	30 character description System populated	[my] paragraph code
Sequence	5 digit number Sequence number for paragraph to appear in letter	1

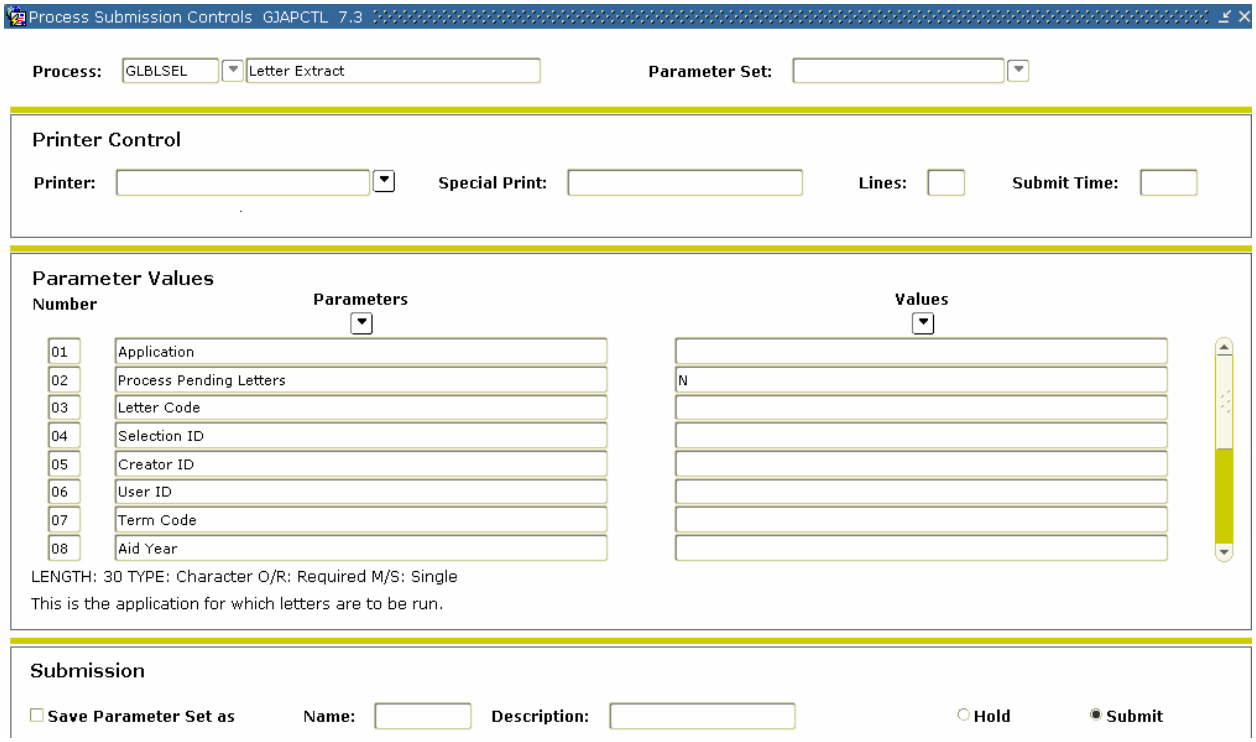
Section E: Downloaded Letter Day-to-Day Operations

Lesson: Using the Letter Extract Process

Jump to TOC

Banner process

The Letter Extract Process (GLBLSEL) extracts variable data from the Banner database to be included. 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. This form will also inform users if a letter cannot be created because the ID did not match the selection or address criteria. The log file will list the names and IDs for those who did not receive the letter because of the missing address or because other non-address selection criteria was not met.



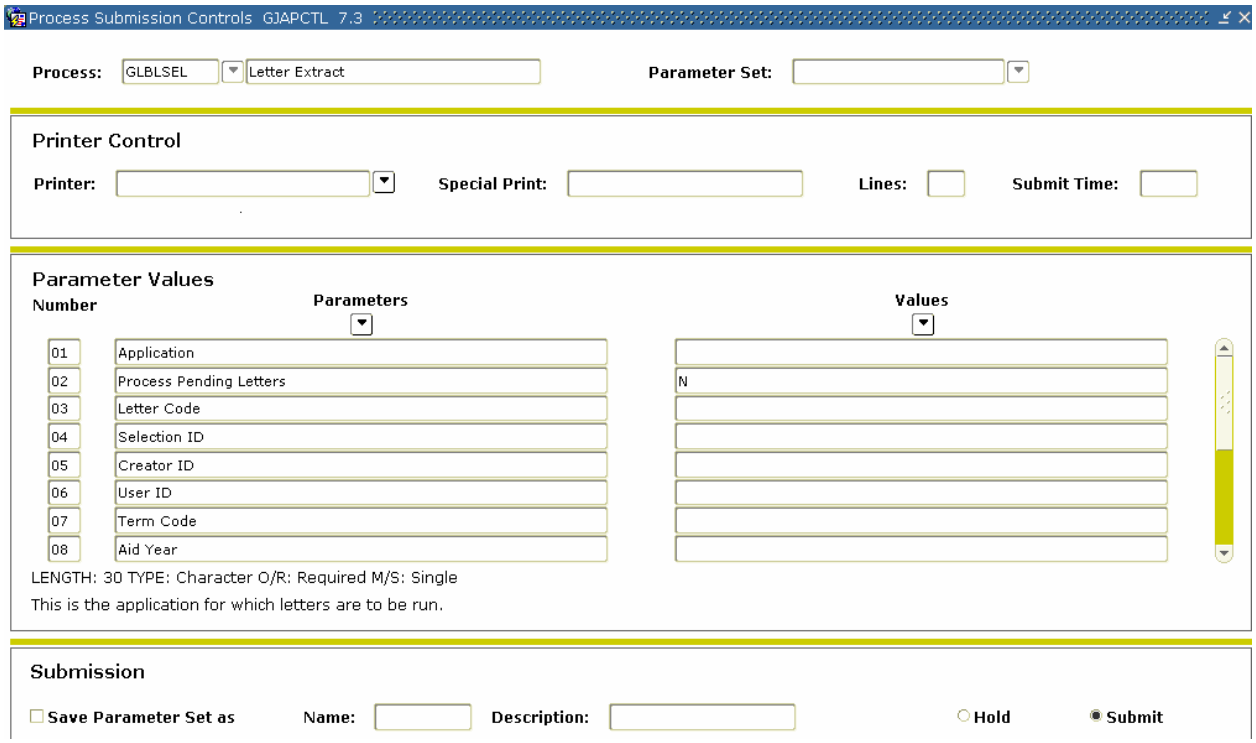
Section E: Downloaded Letter Day-to-Day Operations

Lesson: Using the Letter Extract Process (Continued)

Jump to TOC

Overview

You finished setting up your letter. It is time to produce your letters. The Letter Extract Process (GLBLSEL) extracts the data as specified in the variables that are in the requested letter. The extracted data is inserted into the Letter Collector Table (GLRCOLR).



Parameters

These parameters are needed for the procedure that follows, Parameters Values block.

Req?	Parameter	Description
✓	**01 Application**	Select List of Values to find your application. James Quick would select *JCQ_APPLICATION*.

Section E: Downloaded Letter Day-to-Day Operations

Lesson: Using the Letter Extract Process (Continued)

Jump to TOC

Parameters, continued

Req?	Parameter	Description
✓	**02 Process Pending Letters**	*N* is the default. *N* only processes a specific letter. *Y* produces all pending letters for the letter code entered in the next parameter. Procedurally, pending letters should be printed for only a specific letter code. If you select *Y*, you cannot use the Population Selection parameters.
✓	**03 Letter Code**	James Quick would enter *JQ_LETR*.
	04 Selection ID	Letters are produced from this Population Selection. You cannot use a Population Selection if you selected *Y* in parameter 02 Process Pending Letters.
	05 Creator ID	Required only if using a Population Selection. This is the ID of the person who created the Population Selection ID.
	06 User ID	Required only if using a Population Selection. It is the user ID of the person who ran GLBDATA to create the Population Selection.
	07 Term Code	Student System only. Required only when extracting Pending Student System letters. The application must be associated with the Student System and Process Pending Letters not selected.
	08 Aid Year	Financial Aid System only. Required for those letters that are pending for the aid year specified. Only one aid year is extracted per run.

Parameters, continued

Req?	Parameter	Description
	09 Address Selection Date	Enter the address date for which the address of choice must be effective. If no date is entered, the current date is used. If you want to use a value other than the system date, you can enter a not-null value on GJAPCTL.
✓	**10 Address Type**	The address selection is a three-character field. The first character is the priority of the address and the remaining two characters are the address type from the Address Type Code Validation Form (STVATYP). Example: 1MA, 2PR, 3SE In this example, the mailing address (MA) is the first choice and the permanent address (PR) is the send choice. Each type must be entered on a separate line. Use the Insert Record function to create a new line. Enter parameter number 10 and the description defaults. Enter the new address type in the Values field.
	11 Detailed Error Report	Valid values are *Y* or *N*.
	12 Detailed Execution Report	Valid values are *Y* or *N*.

Section E: Downloaded Letter Day-to-Day Operations

Lesson: Using the Letter Extract Process (Continued)

Jump to TOC

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Letter Extract Process (GLBLSEL).
2	Navigate to the Printer Control block and select the printer that you are using.
3	Navigate to the Parameter Values block and enter the parameters for the job submission. Use the table on the previous pages.
4	Navigate to the Submission block.
5	Select the **Submit** radio button, if necessary.
6	Click the **Save** icon. Note: Note the number in the auto hint line after saving.
7	Review the output by selecting Review Output from the **Options** menu. Note: Use the number you noted in the previous step to review the output of the GLBSEL run. By reviewing the output, you can see the IDs that did not have addresses and will not have letters created for them.
8	Click the **Exit** icon.

Section E: Downloaded Letter Day-to-Day Operations

Lesson: Using the Letter Generation Print Report

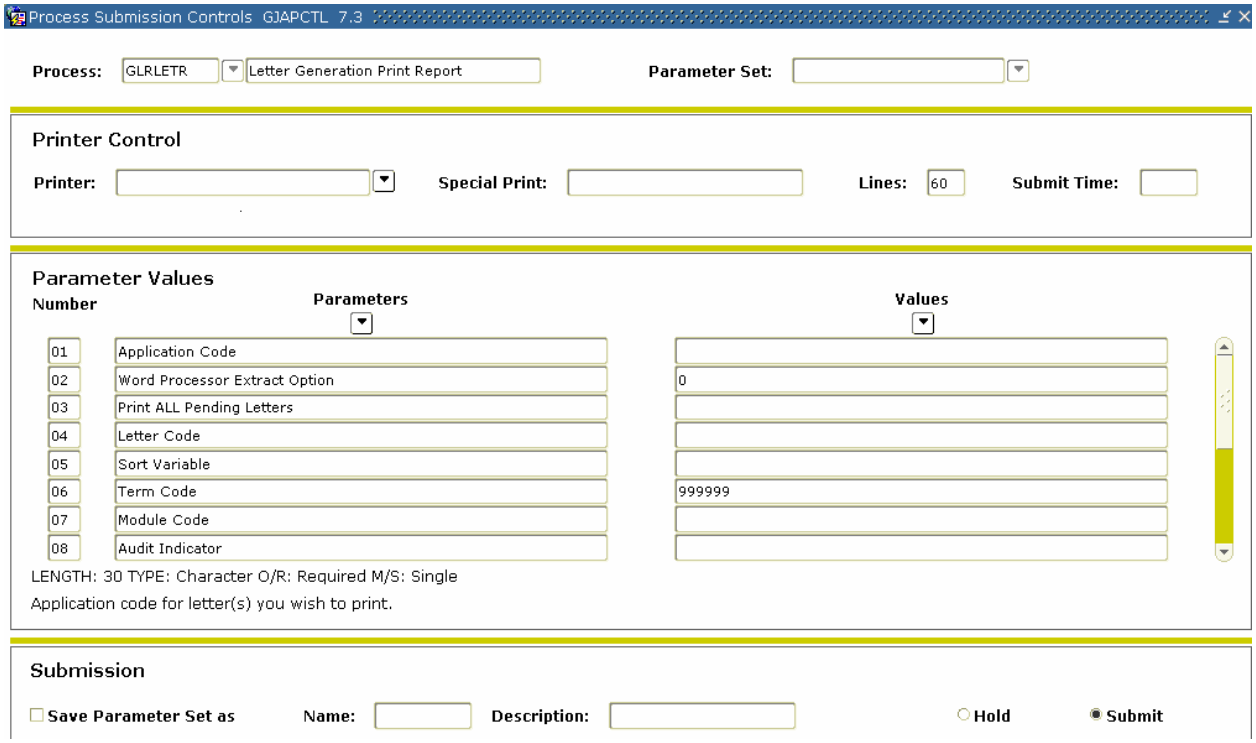
Jump to TOC

Introduction

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

You may

- generate either letters or a file that can be downloaded to Word or WordPerfect
- print a summary report
- update the General Mail Table (GURMAIL).



Section E: Downloaded Letter Day-to-Day Operations

Lesson: Using the Letter Generation Print Report (Continued)

Jump to TOC

Parameters
These parameters are needed for the procedure that follows, Parameters Values block.

Req?	Parameter	Description
✓	**01 Application Code**	Select the List of Values to find your application.
✓	**02 Word Process Extract Option**	Enter the number corresponding to the extract needed: • *0* – Banner "printed" letter (default) • *1* – Microsoft Word "download" file • *2* – WordPerfect "download" file Choosing 1 or 2 produces an output file that contains a header record containing all of the variables that are used in the letter and the records for each ID in the population separated by commas. The name of the file that is produced is the name of the letter with the extension.*doc*. Example: James Quick's letter would be *JQ_LETR.doc*.
✓	**03 Print ALL Pending Letters**	Enter *Y* to print all pending letters for the application code. Enter *N* to print a specific letter. The default value is *N*.
	04 Letter Code	Enter the letter code of the letter to be printed.
	05 Sort Variable	To sort the printed letters in a specific order, enter the name of a variable that determines the order. The sort variable must be contained in the letter.
	06 Term Code	Required for the Student System only. All other systems use the default value of 999999.

Parameters, continued

Req?	Parameter	Description
✓	**07 Module Code**	Enter the one character module code associated with the letter being produced. This code updates the print date of published materials in the mail table that matches the module code entered and produces a list of the recipients and their materials in the report control information. Published materials are items that are sent to individuals but are not printed by Banner Letter Generation, such as college catalogs, sports brochures, and preprinted forms. A Admissions B Billing C Constituent G Gifts/Pledges F Registration H History R Recruiting
	08 Audit Indicator	Enter *Y* to run in audit mode. One sample letter is produced for each letter code extracted. No updates are done. Enter *N* to produce letters and a summary report. It updates the print dates for the generated letters existing on the Mail Query Form (GUIMAIL) or creates a new entry. It also deletes all the data in the Letter Collector Table (GLRCOLR) for the letters selected to print.
	09 Free Format Date 1	Used only for producing letters via Banner. It is not used if you are performing an extract for Microsoft Word or WordPerfect. Enter a free formatted date to be printed on the requested letter for variable *DATE1. *DATE1 can be a variable on a letter that has not been built on the Variable Rules Definition Form (GLRVRBL). Its value becomes what is entered for the parameter.

Parameters, continued

Req?	Parameter	Description
	10 Free Format Date 2	Used only for producing letters via Banner. It is not used if you are performing an extract for Microsoft Word or WordPerfect. Enter a free formatted date to be printed on the requested letter for variable *DATE2. *DATE2 can be a variable on a letter that has not been built on the Variable Rules Definition Form (GLRVRBL). Its value becomes what is entered for the parameter.
	11 Free Format Date 3	Used only for producing letters via Banner. It is not used if you are performing an extract for Microsoft Word or WordPerfect. Enter a free formatted date to be printed on the requested letter for variable *DATE3. *DATE3 can be a variable on a letter that has not been built on the Variable Rules Definition Form (GLRVRBL). Its value becomes what is entered for the parameter.
	12 Aid Year Code	Required only for the Financial Aid System.

Section E: Downloaded Letter Day-to-Day Operations

Lesson: Using the Letter Generation Print Report (Continued)

Jump to TOC

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Letter Generation Print Report (GLRLETR).
2	Navigate to the Printer block and enter *DATABASE*. Note: To do a download of data, you would always want to use DATABASE. Note: You can review the output on the Save Output Review Form (GJIREVO) where job outputs can be viewed regardless of file extension. The log file can be viewed for GLBLSEL. The log, list and doc (for mail merge) files can be viewed for GLRLETR. These files can be written to the database, if so requested, and can be displayed or saved to your local desktop machine.
3	Navigate to the Parameter Values block to enter the parameters for your job. Use the table on the previous pages.
4	Navigate to the Submission block.
5	Select the **Submit** radio button, if necessary.
6	Click the **Save** icon.
7	Click the **Exit** icon.

Section E: Downloaded Letter Day-to-Day Operations

Lesson: Summary

Jump to TOC

Let's review

As a result of completing this workbook, you have

- defined the contents of a paragraph
- reviewed and change the contents of a paragraph
- created a letter by adding paragraphs
- defined the rules for a single variable using several data elements
- copied the rules from an existing variable to a new one
- created a variable using a join
- generated a print report.

Now you are ready to make decisions based upon your organization's needs as to which code validation forms and control and rules forms will be used as well as the values needed on these forms.

Section E: Downloaded Letter Day-to-Day Operations

Lesson: Self Check

Jump to TOC

Directions

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

Question 1

The formatting command #CONCAT x places ‘x’ next to the preceding word without inserting a space between them.

True or False

Question 2

What does a formatting command start with?

Question

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

Question 4

Why do you use the **Print Command** field?

Question 5

What function does the sequence number perform?

Question 6

What is the difference between using SPVADDS verses SPRIDEN?

Question 7

Can I copy a variable into the same application?

Question 8

If all tables referenced in the variable must be listed in the **From** field, why aren’t they joined in the rules?

Section E: Downloaded Letter Day-to-Day Operations

Lesson: Self Check (Continued)

Jump to TOC

Question 9

How does selecting a value in the variable sub-query work differently here than in other parts of the system?

Question 10

What is the function of the Mail Query Form (GUIMAIL)?

Question 11

The Letter blocks on what Student forms can also be used to add letters to the system?

Section E: Downloaded Letter Day-to-Day Operations

Lesson: Answer Key for Self Check

Jump to TOC

Question 1

The formatting command #CONCAT x places ‘x’ next to the preceding word without inserting a space between them. (True or False).

True

Question 2

What does a formatting command start with?

A formatting command always starts with the pound (#) sign.

Question 3

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

A variable always starts with an asterisk (*) and is placed in the first position of a line.

Question 4

Why do you use the **Print Command** field?

This field identifies the alternate print command for the associated letter. If you wanted to override the default print command to Portrait, you would enter PL (Print Landscape). This is for Banner generated letters only.

Question 5

What function does the sequence number perform?

The sequence number tells Banner the order in which you would like your paragraphs printed in the letter.

Question 6

What is the difference between using SPVADDS verses SPRIDEN?

SPVADDS is a view. It is a collection of data from various tables. SPRIDEN is a table where the actual data resides.

Section E: Downloaded Letter Day-to-Day Operations

Lesson: Answer Key for Self Check (Continued)

Jump to TOC

Question 7

Can I copy a variable into the same application?

Yes, you can copy a variable into any application. However, if you copy it into the same application, rename the variable.

Question 8

If all tables referenced in the variable must be listed in the **From** field, why aren't they joined in the rules?

PIDM joins will automatically occur for the tables referenced in the From field. All other joins must be done manually in the rules.

Question 9

How does selecting a value in the variable sub-query work differently here than in other parts of the system?

Normally, when you select a value, only the actual value is returned. In this case, the value was returned, prefixed with "(*SUB" and followed by ")".

Question 10

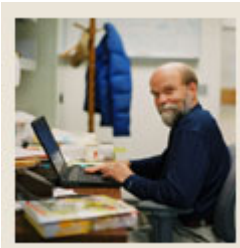
What is the function of the Mail Query Form (GUIMAIL)?

The Mail Query Form (GUIMAIL) is used to display and maintain correspondence with a person. This is a display-only form – you can't update correspondence here. It also displays all letters associated with the person, regardless of system (i.e., Student, Alumni, Financial Aid, etc.).

Question 11

The Letter blocks on what Student forms can also be used to add letters to the system?

Admissions Form (SAAADMS)
Admission Decision Form (SAADCRV)



Section F: Reference

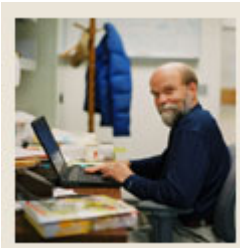
Lesson: Overview

Jump to TOC

Introduction

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

Section contents



Section F: Reference

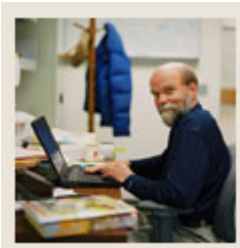
Lesson: Setup Forms and Where Used

Jump to TOC

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
System Indicator Validation	GTVSYSI		



Section F: Reference

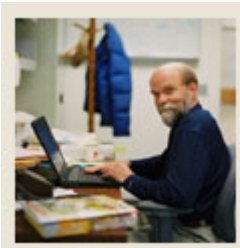
Lesson: Day-to-Day Forms and Setup Needed

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)	• Paragraph Code Validation (GTVPARA) • Variable Rules Definition (GLRVRBL)
Letter Process Form (GUALETR)	• Letter Code Validation (GTVLETR) • Paragraph Code Validation (GTVPARA)



Section F: Reference

Lesson: Forms Job Aid

Jump to TOC

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 Description	Owner
GLRVRBL	Variable Rules Definition	
GTVLETR	Letter Code Validation	
GTVPARA	Paragraph Code Validation	
GLRAPPL	Application Definition Rules	
GLRSLCT	Population Selection Definition Rules	
GTVSYSI	System Indicator Validation	
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 05/31/2006.