

SCT Banner
General
Letter Generation Training Workbook

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Section A: Introduction

Overview

Workbook goal This course is intended to teach you to identify key forms, tables, and reports in the SCT Banner System. In addition, you will learn to follow key processes and query tables. The workbook is divided into these sections:

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

Intended audience General Administrators and Staff

In this section These topics are covered in this section.

Topic	Page
Process Introduction	A-2
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Process Introduction

Introduction

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

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

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.
-

Terminology

Application	All variables from any letter must be from the application, which is a storage unit for all related information.
Formatting commands	Formatting commands include the appearance of the letter such as margins, tabs, underlines and centers. These are not necessary if you are using a word processing software to produce your final product.
Letter	A letter can contain a single paragraph (for downloading for word processing) a series of paragraphs (for printing a letter via SCT Banner).
Letter code	A letter code identifies the name and description of the letter.
Paragraph	Paragraphs within banner contain text, variables and formatting commands. If the letter is to be downloaded (exported) to MS Word or WordPerfect, then it will only contain variables.
Paragraph code	Paragraph code identifies the name and description of the paragraph.
Text	Boilerplate text that surrounds the variables and is formatted via formatting commands (not used when downloading the letter).
Variable	Lines of SQL code which are rules for extracting the information that you need.

Section B: Set Up

Overview

Purpose	The purpose of this section is to outline the set-up process and detail the procedures to set-up your Banner system to handle Letter Generation at your institution.
Intended audience	Banner General Administrators
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.
Prerequisites	To complete this section, you should have <ul style="list-style-type: none">• completed the SCT Education Practices computer-based training (CBT) tutorial “Banner 7.x Fundamentals: Navigation and Forms,” or have equivalent experience navigating in the SCT Banner system• become familiar with database concepts and naming conventions• developed a Population Selection or Pending Mail to receive the letter• become familiar with the merge techniques used to create a letter outside of Banner (if you choose to follow the download option)• administrative rights to create the rules and set the validation codes in Banner.

In this section These topics are covered in this section.

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Rules and Validation Forms Used in Letter Generation

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. Directions on how to set the parameters start on the next page.

Form Description	Banner Name	Page
Variable Rules Definition	GLRVRBL	B-3
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Variable Rules Definition

Description

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.

Screen image

The screenshot displays the Variable Rules Definition Form (GLRVRBL 7.0) with the following sections:

- Application:** A dropdown menu.
- Variable:** A dropdown menu.
- Description:** A text field for "Description" and a dropdown menu for "Type".
- Definition:** Fields for "Seq No:" (with a small input box), "of" (text), and another small input box. Below are text fields for "Select:", "From:", "Order By:", "Group By:", and "Description:".
- Rules:** A table with columns: '(', Data Element (dropdown), Operator (dropdown), Value (dropdown), ')', and AND/OR (dropdown). There are three rows of input fields for each column.

Letter Code Validation

Description

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

Screen image

Letter Code	Description	Allow Duplicates	Alternate Letter Code	Print Command	Activity Date
ADM_APPL_ACKN	Admissions Application Ackn	<input checked="" type="checkbox"/>			18-AUG-2004
ADM_CHKL	Admissions Checklist Letter	<input type="checkbox"/>			17-MAY-1995
ADM_FA_INTEREST	Financial Aid Interest Letter	<input type="checkbox"/>			23-MAY-1995
ADM_INT_1	Admissions Interview 1 Letter	<input type="checkbox"/>			23-MAY-1995
AD_ACK_GIFTS	Gift Acknowledgement Letter	<input checked="" type="checkbox"/>			10-MAY-1995
AD_ACK_SPECIAL	Acknowledgement of Special Gif	<input type="checkbox"/>	AD_ACK_TWO		10-MAY-1995
AD_ACK_TWO	Second Special Ackn of Gifts	<input checked="" type="checkbox"/>			10-MAY-1995
AD_QUIK_RECPT	Quick On line Gift Receipt	<input checked="" type="checkbox"/>			10-MAY-1995
AMCAS_LETTER	AMCAS Letter	<input type="checkbox"/>			06-JUL-2004
ANNUAL_FND_ACKN	Annual Fund Gift Ackn Letter	<input checked="" type="checkbox"/>			29-AUG-1991
BILLZ_TEST	Bill Zimmer's test letter	<input checked="" type="checkbox"/>			17-FEB-2004
CORP_GIFT_ACKN	Corporate Gift Acknowledgement	<input checked="" type="checkbox"/>			29-AUG-1991
DAYNA'S_TEST	Dayna's test of 'copy'	<input type="checkbox"/>			17-JUN-2004
DAYNA'S_TEST2	Second Test for SOAELTR	<input type="checkbox"/>			14-SEP-2004
DCSN	Decision letters	<input type="checkbox"/>			01-NOV-1989
DIRECTOR_THANKS	Director's Gift Thank you Ltr	<input type="checkbox"/>			29-AUG-1991
DUES_ACKNOW	Dues Acknowledgement	<input checked="" type="checkbox"/>	A/D_ACK_SPECIAL		07-OCT-1992
EMP_MG_NOTICE	Employee Notification of Match	<input checked="" type="checkbox"/>			29-AUG-1991
FA_AWRD_W_COST	FA Award Letter with Costs	<input checked="" type="checkbox"/>			15-JAN-1995
FA_TRACKING	Missing Inform. Letter -FINAID	<input checked="" type="checkbox"/>			15-JAN-1995
FOUNDATION_ACKN	Foundation Gift Ackn Letter	<input checked="" type="checkbox"/>			29-AUG-1991
FOUN_PLDG_ACKN	Foundation Pledge Ackn Letter	<input checked="" type="checkbox"/>			29-AUG-1991

Paragraph Code Validation

Description

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

Screen image

Code	Description	Comment	Activity Date
ACCEPT	Admissions Acceptance Para	Body of the Admissions Acceptance letter	03-OCT-1991
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	Acknowledgemnt address name for constituent.	23-OCT-1991
ANAMESL	A/D Ack. first name salutation	Alumni Development name salutation for acknowledgements.	23-OCT-1991
AORGNM	Alumni Ack org addr name	Acknowledgement address name for organization.	23-OCT-1991
AORGNL	A/D Ack. orgn. name salutation	Alumni Development org primary name salutation for acknowledgements.	23-OCT-1991
APPADDR	Student's Name and Address	From the Student's Current Financial Aid Application	16-SEP-1991

Population Selection Definition Rules

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.

Screen image

Population Selection Definition Rules GLRSLCT 7.0

Application: Selection ID:
Creator ID: SAISUSR

Selection Description

Manual Locked Delete

Definition

Select:
From:

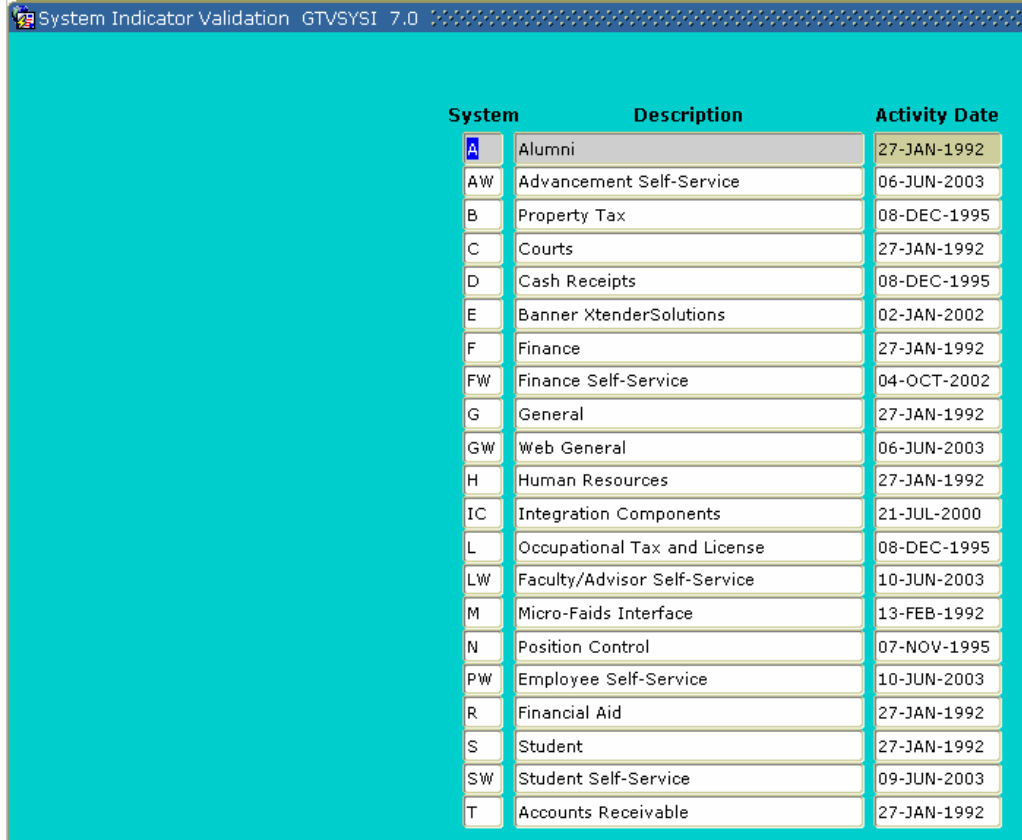
Rules	'('	Data Element	Operator	Value)'	AND / OR
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

System Indicator Validation

Description

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

Screen image



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
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
T	Accounts Receivable	27-JAN-1992

Creating a Paragraph Code

Banner form

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

Code	Description	Comment	Activity Date
ACCEPT	Admissions Acceptance Para	Body of the Admissions Acceptance letter	03-OCT-1991
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
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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
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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
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AK_RCPT	A/D Gift Ack. Receipt	Alumni/Development gift acknowledgement receipt.	28-OCT-1991
ANAMEAD	Alumni Ack Const. addr name	Acknowledgemnt address name for constituent.	23-OCT-1991
ANAMESL	A/D Ack. first name salutation	Alumni Development name salutation for acknowledgements.	23-OCT-1991
AORGNNM	Alumni Ack org addr name	Acknowledgement address name for organization.	23-OCT-1991
AORGNL	A/D Ack. orgn. name salutation	Alumni Development org primary name salutation for acknowledgements.	23-OCT-1991
APPADDR	Student's Name and Address	From the Student's Current Financial Aid Application	16-SEP-1991

Continued on the next page

Creating a Paragraph Code, Continued

Discussion

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. 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 SCT 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. If not, a code must be generated.

- First paragraph is for a new page.
- Second paragraph is for defining your table settings.
- Third paragraph is the date, address and salutation.
- Fourth paragraph is the body of the letter.
- Fifth paragraph is the closing.

Continued on the next page

Creating a Paragraph Code, Continued

Procedure

Determine whether you are printing by SCT Banner or downloading via SCT Banner letter 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. For a downloaded letter, it is your initials and the letters *DLP*, indicating downloaded. You can use the same paragraph for either printed letters or downloaded letters. The system will only extract variables from the paragraphs when using the download feature.

Note: 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. <u>Example:</u> James Quick would create either paragraph <i>JQ1</i> or <i>JQ_DLP</i> .
5	Enter a description for the code in the Description field.
6	Enter text that describes your paragraph Comment field. <u>Note:</u> Make sure that you have enough text so that it scrolls.
7	Are you following the procedure for a printed letter? If yes, 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 <i>XX_IA</i> , where <i>XX</i> = your initials. <u>Note:</u> This paragraph code is used in later exercises.
8	Click the Save icon.
9	Click the Exit icon.

Creating a Letter Code

Banner form

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

Letter Code	Description	Allow Duplicates	Alternate Letter Code	Print Command	Activity Date
ADM_APPL_ACKN	Admissions Application Ackn	<input checked="" type="checkbox"/>			18-AUG-2004
ADM_CHKL	Admissions Checklist Letter	<input type="checkbox"/>			17-MAY-1995
ADM_FA_INTEREST	Financial Aid Interest Letter	<input type="checkbox"/>			23-MAY-1995
ADM_INT_1	Admissions Interview 1 Letter	<input type="checkbox"/>			23-MAY-1995
AD_ACK_GIFTS	Gift Acknowledgement Letter	<input checked="" type="checkbox"/>			10-MAY-1995
AD_ACK_SPECIAL	Acknowledgement of Special Gif	<input type="checkbox"/>	AD_ACK_TWO		10-MAY-1995
AD_ACK_TWO	Second Special Ackn of Gifts	<input checked="" type="checkbox"/>			10-MAY-1995
AD_QUIK_RECPT	Quick On line Gift Receipt	<input checked="" type="checkbox"/>			10-MAY-1995
AMCAS_LETTER	AMCAS Letter	<input type="checkbox"/>			06-JUL-2004
ANNUAL_FND_ACKN	Annual Fund Gift Ackn Letter	<input checked="" type="checkbox"/>			29-AUG-1991
BILLZ_TEST	Bill Zimmer's test letter	<input checked="" type="checkbox"/>			17-FEB-2004
CORP_GIFT_ACKN	Corporate Gift Acknowledgement	<input checked="" type="checkbox"/>			29-AUG-1991
DAYNA'S_TEST	Dayna's test of 'copy'	<input type="checkbox"/>			17-JUN-2004
DAYNA'S_TEST2	Second Test for SOAELTR	<input type="checkbox"/>			14-SEP-2004
DCSN	Decision letters	<input type="checkbox"/>			01-NOV-1989
DIRECTOR_THANKS	Director's Gift Thank you Ltr	<input type="checkbox"/>			29-AUG-1991
DUES_ACKNOW	Dues Acknowledgement	<input checked="" type="checkbox"/>	A/D_ACK_SPECIAL		07-OCT-1992
EMP_MG_NOTICE	Employee Notification of Match	<input checked="" type="checkbox"/>			29-AUG-1991
FA_AWRD_W_COST	FA Award Letter with Costs	<input checked="" type="checkbox"/>			15-JAN-1995
FA_TRACKING	Missing Inform. Letter -FINAID	<input checked="" type="checkbox"/>			15-JAN-1995
FOUNDATION_ACKN	Foundation Gift Ackn Letter	<input checked="" type="checkbox"/>			29-AUG-1991
FOUN_PLDG_ACKN	Foundation Pledge Ackn Letter	<input checked="" type="checkbox"/>			29-AUG-1991

Procedure

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

Step	Action
1	Access the Letter Code Validation Form (GTVLETR).
2	Enter and execute a query to ensure that the letter code you intend to create does not already exist. The code will be letter XX_LETR (XX = your initials). <u>Note:</u> You will create another code, XX_DLP (for the downloaded letter).
3	Click the Insert Record icon.

Continued on the next page

Creating a Letter Code, Continued

Procedure, continued

Step	Action
4	<p>Enter the name of your letter in the Letter Code field.</p> <p><u>Example:</u> James Quick would enter <i>JQ_LETR</i>.</p>
5	<p>Enter a name for your letter in the Description field, using your name in the text.</p> <p><u>Example:</u> James Quick would enter <i>James Quick's Test Letter</i>.</p>
6	<p>Leave the Allow Duplicates checkbox empty. Checking this box would allow duplicates of this letter to be requested or produced for a person.</p> <p><u>Note:</u> If the Allow Duplicates checkbox is empty, you may enter an alternate letter code. The alternate letter code would be created for a person if they were 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.</p> <p><u>Note:</u> 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.</p>
7	Click the Save icon
8	Click the Exit icon

Continued on the next page

Creating an Application

Banner form

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

The screenshot shows the 'Application Definition Rules' form for GLRAPPL 7.0. It features a blue header bar. Below the header, there are several input fields: 'Application:' with a dropdown menu, 'Description:' with a text box, and 'System:' with a checkbox. A 'Delete All' button is located to the right of the 'System' checkbox. Below these fields is a section titled 'Application Level Rules' which contains a table with columns for '(', 'Data Element', 'Operator', 'Value', ')', and 'AND / OR'. Each column has a corresponding dropdown menu.

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).

Step	Action
1	Access the Application Inquiry Form (GLIAPPL). Review the list of applications already defined.
2	Access the Application Definition Rules Form (GLRAPPL). Here you can create a unique application.
3	Enter <i>XXX_APPLICATION</i> (XXX = your initials) in the Application field. <u>Example:</u> James C. Quick would enter <i>JCQ_APPLICATION</i> .
4	Perform a Next Block function.
5	Enter [<i>Your Name</i>] <i>Application</i> in the Description field. <u>Example:</u> James Quick would enter <i>James Quick's Application</i> .

Continued on the next page

Creating an Application, Continued

Procedure, continued

Step	Action
6	Enter the code applicable to your system in the System field: <i>A</i> Alumni <i>F</i> Finance <i>G</i> General <i>H</i> Human Resources <i>R</i> Financial Aid <i>S</i> Student. Note: No rules need to be entered in the Application Level Rules block.
7	Click the Save icon.
	Click the Exit icon.

Creating Simple Variable Rules

Variables

Variables are pieces of data from your SCT Banner database that you use as data element inserts. Any data element associated with an ID can be defined as a variable.

Procedure

Follow these steps to create a variable.

Step	Action
1	Access the Variable Rules Definition Form (GLRVRL).
2	Enter your application name in the Application field.
3	Enter the name for your variable in the Variable field. <u>Note:</u> For easy identification, your variable name should include your initials. <u>Example:</u> James Quick would create current ID variable *JQ_ID <u>Note:</u> Remember to start the name of your variable with an asterisk (*).
4	Perform a Next Block function.
5	Enter a description for your variable in the Description field.

Continued on the next page

Creating Simple Variable Rules, Continued

Procedure, continued

Step	Action
6	<p>Click the down arrow next to the Type field, to designate this variable as <i>First</i>, 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.</p> <p><u>Note:</u> 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.</p>
7	Perform a Next Block function.
8	Enter <i>SPBPERS_NAME_PREFIX</i> in the Select field. This is the prefix column from the SPBPERS table.
9	Enter <i>SPBPERS</i> in the From field. This is the table name.
10	<p>Enter <i>Name Prefix</i> in the Description field. This is a description for the logic in the sequence.</p> <p><u>Note:</u> No values need to be entered in the Rules block.</p>
12	Click the Save icon.
13	<p>Click the Exit icon.</p> <p><u>Note:</u> You see the message “Performing Variable Compilation, please wait.” If your variable is compiled successfully, the form will exit automatically.</p> <p><u>Note:</u> 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.</p> <p><u>Note:</u> 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.</p>

Continued on the next page

Creating Simple Variable Rules, Continued

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.

Today's Date: *XX_DATE	SELECT: RTRIM(TO_CHAR(SYSDATE,'Month')) ' ' TO_CHAR(SYSDATE,'DD,YYYY') FROM: DUAL *Note The SELECT line should be continuous
First Name *XX_FNAM	SELECT: SPVADDS_FIRST_NAME FROM: SPVADDS
Middle Name *XX_MI	SELECT: SPVADDS_MI FROM: SPVADDS
Last Name: *XX_LNAM	SELECT: SPVADDS_LAST_NAME FROM: SPVADDS
Prefix: *XX_PFX	SELECT: SPBPERS_NAME_PREFIX FROM: SPBPERS
Suffix: *XX_SUFF	SELECT: SPBPERS_NAME_SUFFIX FROM: SPBPERS
Address Line 1: *XX_ADD1	SELECT: SPVADDS_STREET_LINE1 FROM: SPVADDS
Address Line 2: *XX_ADD2	SELECT: SPVADDS_STREET_LINE2 FROM: SPVADDS

Continued on the next page

Creating Simple Variable Rules, Continued

List of variables, continued

Address Line 3: *XX_ADD3	SELECT: SPVADDS_STREET_LINE3
	FROM: SPVADDS
City: *XX_CITY	SELECT: SPVADDS_CITY
	FROM: SPVADDS
State: *XX_STATE	SELECT: SPVADDS_STAT_CODE
	FROM: SPVADDS
Zip: *XX_ZIP	SELECT: SPVADDS_ZIP
	FROM: SPVADDS
Preferred First Name: *XX_PFN	SELECT: SPBPERS_PREF_FIRST_NAME
	FROM: SPBPERS
Gender: *XX_GEND	SELECT: SPBPERS_SEX
	FROM: SPBPERS
Current ID: *XX_ID (first type variable)	SELECT: SPVADDS_ID
	FROM: SPVADDS
Marital Status: *XX_MRTL	SELECT: SPBPERS_MRMTL_CODE
	FROM: SPBPERS
Nation: *XX_NATN	SELECT: SPVADDS_NATN_DESC
	FROM: SPVADDS

Defining Single Variable Rules Using Several Data Elements

Banner form

The Variable Rules Definition Form (GLRVRBL) is used to define, maintain, and copy a variable.

The screenshot shows the 'Variable Rules Definitions - GLRVRBL 7.0' window. It contains several sections:

- Application:** A dropdown menu.
- Variable:** A dropdown menu.
- Description:** A text input field and a 'Type:' dropdown menu.
- Definition:** Fields for 'Seq No:' (with a small input box), 'of', and another small input box. Below are 'Select:', 'From:', 'Order By:', 'Group By:', and 'Description:' labels, each followed by a text input field.
- Rules:** A table-like structure with columns: '(', 'Data Element', 'Operator', 'Value', ')', and 'AND/OR'. Each column has three rows of input fields.

Continued on the next page

Defining Single Variable Rules Using Several Data Elements, Continued

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 (*). <u>Note:</u> Use the variable name <i>*NAME_FULL_W_PREFIX</i> .
3	Enter a description for your variable in the Description field. <u>Note:</u> 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 <u>Note:</u> 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 <i>SPBPERS</i> .
9	Enter a description for this variable. <u>Example:</u> <i>Name Prefix</i> .
10	Click the Save icon.
11	Click the Exit icon. <u>Note:</u> See the previous lesson for messages that may display. <u>Note:</u> If you are creating an actual select statement, you would also need to specify that the PIDM in SPBPERS equaled 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.

Copying the Rules From an Existing Variable to a New One

Banner form

The Variable Rules Definition Form (GLRVRBL) is used to define, maintain, and copy a variable.

The screenshot shows the 'Variable Rules Definitions - GLRVRBL 7.0' window. It contains several sections: 'Application' and 'Variable' dropdown menus; a 'Description' section with a text field and a 'Type' dropdown; a 'Definition' section with 'Seq No:' (two input boxes with 'of' between them), 'Select:', 'From:', 'Order By:', 'Group By:', and 'Description:' fields; and a 'Rules' section with a table of columns: '(', 'Data Element', 'Operator', 'Value', ')', and 'AND/OR'. Each column has three rows of input fields.

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.

Continued on the next page

Copying the Rules From an Existing Variable to a New One, Continued

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Variable Rules Definition Form (GLRVRBL).
2	Enter the code for <i>Admission</i> . in the Application field.
3	Review the list of variables defined within the application. Select the variable <i>*FNAME</i> . <u>Note:</u> You will copy the rules for the variable FNAME to the application you created and defined in the previous exercises.
4	Select the <u>Copy Variable</u> 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. <u>Note:</u> Remember to put an asterisk at the beginning.
7	Click the Save icon. <u>Note:</u> 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. <u>Note:</u> 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	*NAME_PREFERRED
*STR1	*GENDER
*STR2	*ID
*STR3	*MRTL
*CITY	

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.

The screenshot shows the 'Variable Rules Definitions' window for GLRVRBL 7.0. It is divided into several sections:

- Application:** A dropdown menu.
- Variable:** A dropdown menu.
- Description:** A text input field and a 'Type' dropdown menu.
- Definition:** Fields for 'Seq No.', 'of', and 'Select'. Below these are 'From:', 'Order By:', 'Group By:', and 'Description:' fields.
- Rules:** A table with columns: '(', 'Data Element', 'Operator', 'Value', ')', and 'AND/OR'. Each column contains a dropdown menu.

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. <u>Note:</u> 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 <i>Marital Status Description</i> in the Description field.
6	Perform a Next Block function.
7	Enter <i>STVMRTL_DESC</i> in the Select field of the Definition block.

Continued on the next page

Creating a Variable Using a Join, Continued

Procedure, continued

Step	Action						
8	Enter <i>STVMRTL, SPBPERS</i> in the From field. <u>Note:</u> 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. <u>Example:</u> <i>Marital Status Description.</i>						
10	Click the Save icon.						
11	Perform a Next Block function.						
12	Enter these values in the Rules block. <table data-bbox="505 800 1422 907"> <tr> <td>Data Element</td> <td>STVMRTL_MRTL_CODE</td> </tr> <tr> <td>Operator</td> <td>=</td> </tr> <tr> <td>Value</td> <td>SPBPERS_CODE</td> </tr> </table>	Data Element	STVMRTL_MRTL_CODE	Operator	=	Value	SPBPERS_CODE
Data Element	STVMRTL_MRTL_CODE						
Operator	=						
Value	SPBPERS_CODE						
13	Leave all other fields empty.						
14	Click the Save icon.						
15	Click the Exit icon. <u>Note:</u> Your join was defined in the Rules block. Your rule stated that the marital status description you wanted was the description of the code for the person. In this case, you were required to perform the join because only PIDM joins are performed automatically. <u>Result:</u> You see the message ‘Performing Variable Compilation, please wait.’ If your variable is compiled successfully, you will exit the form automatically.						

Self Check

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 The form is completely filled; does the user have to scroll all the way to the bottom to enter a new code?

Question 4 What is another term for a variable?

Question 5 On what form would the user define a variable?

Question 6 What would you enter if you wanted to override the default print command?

Question 7 If *Y* is selected for the parameter **Process Pending Letters**, can Population Selection be used?

Question 8 If letters are not being processed from the Student System, does a value in the **Term Code** parameter need to be entered?

Question 9 If letters are not being processed from the Financial Aid System, does a value have to be entered in the **Aid Year** parameter?

Continued on the next page

Self Check, Continued

Question 10 Can the **Free Format Date** parameters be used if a download letter is being produced?

Question 11 How can the letter be checked to see if it prints properly before printing all of the letters via SCT Banner?

Question 12 How do you print letters in zip code order?

Question 13 Is the term code required?

Question 14 Is an aid year code required?

Question 15 If published materials are not included with the letter, does a module code still have to be entered?

Question 16 How can a letter that has been generated for a person be verified?

Answer Key for Self Check

-
- 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** The form is completely filled; does the user have to scroll all the way to the bottom to enter a new code?
- No; just use the Record Insert function to enter the new code.**
-
- Question 5** On what form would the user define a variable?
- A variable is defined on the Variable Rules Definition Form (GLRVRBL).**
-
- Question 6** What would you enter if you wanted to override the default print command?
- If you wanted to override the default print command (portrait), you would enter PL (Print Landscape). This is for Banner generated letters only.**
-
- Question 7** If Y is selected for the parameter **Process Pending Letters**, can Population Selection be used?
- If Y is selected for the Process Pending Letters parameter, Population Selection cannot be used.**
-
- Question 8** If letters are not being processed from the Student System, does a value in the **Term Code** parameter need to be entered?
- No; that parameter is optional.**
-
- Question 9** If letters are not being processed from the Financial Aid System, does a value have to be entered in the **Aid Year** parameter?
- No; that parameter is optional.**
-

Continued on the next page

Answer Key for Self Check, Continued

-
- Question 10** Can the **Free Format Date** parameters be used if a download letter is being produced?
- If dates are entered, it does not affect anything. These dates are only used for producing a letter via SCT Banner.**
-
- Question 11** How can the letter be checked to see if it prints properly before printing all of the letters via SCT Banner?
- Enter Y in the 08 Audit Indicator parameter. One sample letter is produced, and the system is not updated.**
-
- Question 12** How do you print letters in zip code order?
- Select the variable created for zip code and enter it in the 05 Sort Variable parameter.**
-
- Question 13** Is the term code required?
- No; term code is required for the Student System only. All other systems use the default value of 999999.**
-
- Question 14** Is an aid year code required?
- No; it is an optional requirement if the letter is not being run for the Financial System.**
-
- Question 15** If published materials are not included with the letter, does a module code still have to be entered?
- Module code is a required field and an entry must be made.**
-
- Question 16** With what form can a letter that has been generated for a person be verified?
- Generated letters for an individual or organization can be viewed on the Mail Inquiry Form (GUIMAIL).**
-

Section C: Day-to-Day Operations

Overview

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

Intended audience General Office Staff.

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.

Prerequisites To complete this section, you should have

- completed the SCT Education Practices computer-based training (CBT) tutorial “Banner 6.x Fundamentals: Navigation and Forms,” or have equivalent experience navigating in the SCT Banner system.
- become familiar with database concepts and naming conventions
- developed a Population Selection or Pending Mail to receive the letter
- become familiar with the merge techniques used to create a letter outside of Banner (if you choose to follow the download option).

In this section These topics are covered in this section.

Topic	Page
Process Introduction	C-2
Defining the Contents of a Paragraph	C-3
Reviewing and Change the Contents of a Paragraph	C-7
Modifying the Printed Letter	C-8
Creating a Letter by Adding Paragraphs	C-9
Using the Letter Extract Process	C-11
Using the Letter Generation Print Report	C-15
Summary	C-20
Self Check	C-21
Answer Key for Self Check	C-23

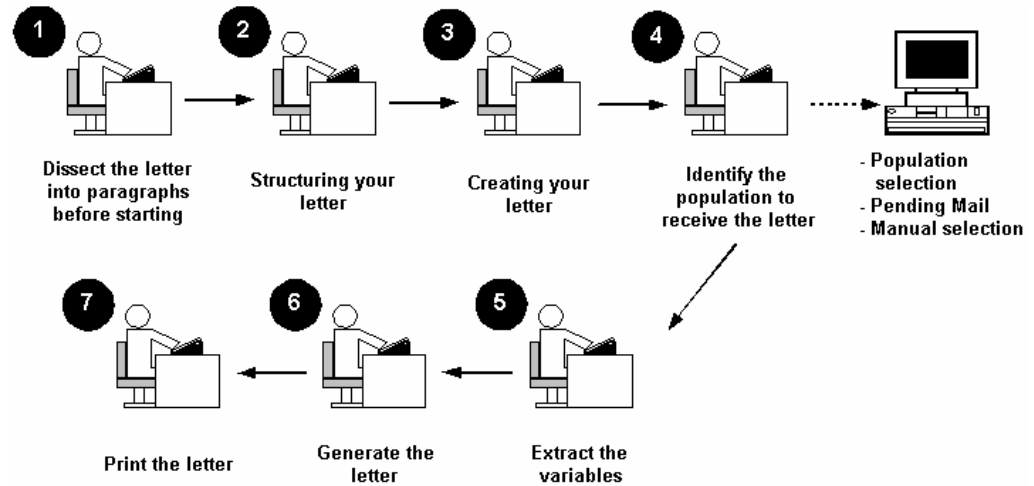
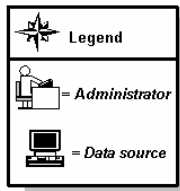
Process Introduction

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 Flow



What happens

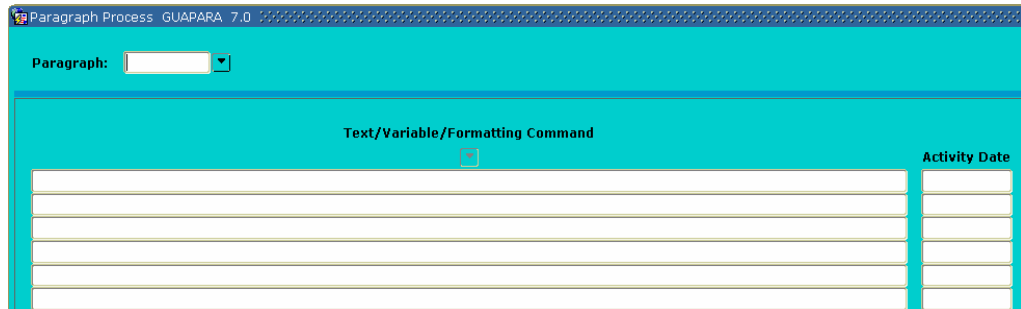
The stages of the process are described in this table.

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

Defining the Contents of a Paragraph

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.



Text/Variable/Formatting Command	Activity Date

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 SCT Banner print functions. MS Word, for example, will remove the space from a null variable. In the example below, if there was no address line #2 or #3 for the person, the City, State, Zip would move up.

Continued on the next page

Defining the Contents of a Paragraph, Continued

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 <i>Fields and values</i> table that follows. <u>Note:</u> The cursor does not advance to the next line if an invalid variable is entered. <u>Note:</u> If you plan to download data to support your word processing needs see the topic, <i>Using the Letter Generation Print Report</i> . <u>Example:</u> When you see "XX", XX = your initials.

Continued on the next page

Defining the Contents of a Paragraph, Continued

Fields and values 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]

Continued on the next page

Defining the Contents of a Paragraph, Continued

Fields and values 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)
Text/Variable /Formatting Command	Enter only the variables for the contents of your paragraph (up to 60 characters each line) <u>Note:</u> XX_ID is a first type variable that will eliminate multiples.	*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]

Reviewing and Changing the Contents of a Paragraph

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. <u>Note:</u> If your letter is to be printed by Banner, then add the formatting command #N. Skip this task if using the download option.
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)	XX1 (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]

Modifying the Printed Letter

Fields These fields are used when modifying the printed letter.

Field Name	Description	Value
Paragraph	Define a paragraph code (up to 7 characters)	XX_DLP (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 *XX_NATN ...
Activity Date	System generated	[today's date]

Creating a Letter by Adding Paragraphs

Banner form

The Letter Process Form (GUALETR) is used 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). Here you will combine your paragraph codes to form a letter.
2	Enter values found in the tables that follow for a letter printed by Banner and for a downloaded letter. <u>Note:</u> If using the download option You can create paragraphs that only contain variables or use paragraphs that contain formatting commands, text and variables and the download process will only select the variables.
3	Click the Save icon.
4	Click the Exit icon.

Continued on the next page

Creating a Letter by Adding Paragraphs, Continued

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 <i>TB_RECR</i> <i>NEWPAGE</i> <i>XX_IA</i> <i>For the body, select from the following:</i> <i>Alumni = DUE_ACK</i> <i>FA = TRACK</i> <i>Student = ACCEPT</i> <i>CLOSING</i>	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

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

Using the Letter Extract Process

Banner form

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.

Process: GBLSEL Letter Extract Parameter Set:

Printer Control
Printer: Special Print: Lines: Submit Time:

Parameter Values

Number	Parameters	Values
01	Application	
02	Process Pending Letters	N
03	Letter Code	
04	Selection ID	
05	Creator ID	
06	User ID	
07	Term Code	
08	Aid Year	

LENGTH: 30 TYPE: Character O/R: Required M/S: Single
This is the application for which letters are to be run.

Submission
 Save Parameter Set as Name: Description: Hold Submit

Continued on the next page

Using the Letter Extract Process, Continued

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).

Process Submission Controls GJAPCTL 7.0

Process: GLBLSEL Letter Extract Parameter Set:

Printer Control
 Printer: Special Print: Lines: Submit Time:

Parameter Values

Number	Parameters	Values
01	Application	
02	Process Pending Letters	N
03	Letter Code	
04	Selection ID	
05	Creator ID	
06	User ID	
07	Term Code	
08	Aid Year	

LENGTH: 30 TYPE: Character O/R: Required M/S: Single
 This is the application for which letters are to be run.

Submission
 Save Parameter Set as Name: Description: Hold Submit

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 <i>JQ_APPLICATION</i> .
✓	02 Process Pending Letter	<i>N</i> is the default. <i>N</i> only processes a specific letter. <i>Y</i> 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 <i>Y</i> , you cannot use the Population Selection parameters.
✓	03 Letter Code	James Quick would enter <i>JQ_TEST</i> .
	04 Selection ID	This is the Population Selection for which letters are to be produced. You cannot use a Population Selection if you selected <i>Y</i> in parameter 02 Process Pending Letters.

Continued on the next page

Using the Letter Extract Process, Continued

Parameters, continued

Req?	Parameter	Description
	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.
	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	<p>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).</p> <p><u>Example:</u> 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.</p>
	11 Detailed Error Report	Valid values are <i>Y</i> or <i>N</i> .
	12 Detailed Execution Report	Valid values are <i>Y</i> or <i>N</i> .

Continued on the next page

Using the Letter Extract Process, Continued

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Population Selection Definition Rules Form (GLRSLCT).
2	Enter the application you created in the Application field.
3	Enter the name of the selection ID being defined in the Selection ID field (this could be the same as the letter name).
4	Perform a Next Block function.
5	Enter a description in the Selection Description field.
6	Click the Save icon.
7	Click the Exit icon.
8	Access the Population Selection Extract Data Form (GLAEXTR).
9	Enter the application you created in the Application field.
10	Enter the selection ID you created in Step 3 in the Selection ID field.
11	Perform a Next Block function.
12	Enter or search for an ID in the ID field to add a person to the list.
13	Click the Save icon.
14	Access the Letter Extract Process (GLBLSEL).
15	Navigate to the Printer Control block and select the printer that you are using.
16	Navigate to the Parameter Values block and enter the parameters for the job submission. Use the table on the previous pages.
17	Navigate to the Submission block.
18	Select the Submit radio button, if necessary.
19	Click the Save icon.
20	Click the Exit icon.

Using the Letter Generation Print Report

Banner form

The Letter Generation Print Report (GLRLETR) can generate letters directly from Banner. The system reads the paragraphs within a letter in the sequence specified. The text is formatted and printed.

Process: Parameter Set:

Printer Control

Printer: Special Print: Lines: Submit Time:

Parameter Values

Number	Parameters	Values
01	Application Code	
02	Word Processor Extract Option	0
03	Print ALL Pending Letters	
04	Letter Code	
05	Sort Variable	
06	Term Code	999999
07	Module Code	
08	Audit Indicator	

LENGTH: 30 TYPE: Character O/R: Required M/S: Single
Application code for letter(s) you wish to print.

Submission

Save Parameter Set as Name: Description: Hold Submit

Continued on the next page

Using the Letter Generation Print Report, Continued

Discussion

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

You can

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

Process: Parameter Set:

Printer Control

Printer: Special Print: Lines: Submit Time:

Parameter Values

Number	Parameters	Values
01	Application Code	
02	Word Processor Extract Option	0
03	Print ALL Pending Letters	
04	Letter Code	
05	Sort Variable	
06	Term Code	999999
07	Module Code	
08	Audit Indicator	

LENGTH: 30 TYPE: Character O/R: Required M/S: Single
Application code for letter(s) you wish to print.

Submission

Save Parameter Set as Name: Description: Hold Submit

Continued on the next page

Using the Letter Generation Print Report, Continued

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	<p>Enter the number corresponding to the extract needed:</p> <ul style="list-style-type: none"> • 0 – SCT Banner “printed” letter (default) • 1 – Microsoft Word “download” file • 2 – WordPerfect “download” file <p>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 <i>.doc</i>. <u>Example:</u> James Quick’s letter would be <i>JQ_LETR.doc</i>.</p>
✓	03 Print ALL Pending Letters	Enter <i>Y</i> to print all pending letters for the application code. Enter <i>N</i> to print a specific letter. The default value is <i>N</i> .
	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.
✓	07 Module Code	<p>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 SCT Banner Letter Generation, such as college catalogs, sports brochures, and preprinted forms.</p> <p>A Admissions B Billing C Constituent G Gifts/Pledges F Registration H History R Recruiting</p>

Continued on the next page

Using the Letter Generation Print Report, Continued

Parameters, continued

Req?	Parameter	Description
	08 Audit Indicator	<p>Enter <i>Y</i> to run in audit mode. One sample letter is produced for each letter code extracted. No updates are done.</p> <p>Enter <i>N</i> 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.</p>
	09 Free Format Date 1	<p>Used only for producing letters via SCT Banner. It is not used if you are performing an extract for Microsoft Word or WordPerfect.</p> <p>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.</p>
	10 Free Format Date 2	<p>Used only for producing letters via SCT Banner. It is not used if you are performing an extract for Microsoft Word or WordPerfect.</p> <p>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.</p>
	11 Free Format Date 3	<p>Used only for producing letters via SCT Banner. It is not used if you are performing an extract for Microsoft Word or WordPerfect.</p> <p>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.</p>
	12 Aid Year Code	Required only for the Financial Aid System.

Continued on the next page

Using the Letter Generation Print Report, Continued

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 <i>DATABASE</i> . <u>Note:</u> 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, lis 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.
6	Click the Save icon
7	Click the Exit icon

Continued on the next page

Summary

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 begin determining what information related to your faculty will be implemented within the Banner Letter Generation course. Decisions will need to be made based upon your organization's needs as to which code validation forms and control and rules forms will be used as well as what your values will be on these forms.

Self Check

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?

- a) one
 - b) three
 - c) five
 - d) up to seven
-

Question 2 A comment is required to create a paragraph?

True or False

Question 3 If the form is completely filled, I have to scroll to the bottom to enter a new code?

True or False

Question 4 On what form would you define a variable?

- a) SPVADDS
 - b) SPRIDEN
 - c) GLRVRBL
-

Question 5 What is the code for the other simple variables to be created?

Question 6 The formatting command #CONCAT x places 'x' next to the preceding word without inserting a space between them.

True or False

Question 7 What does a formatting command start with?

Question 8 What does a variable start with and where should it be positioned?

Continued on the next page

Self Check, Continued

Question 9 What is the **Print Command** field used for?

Question 10 What function does the sequence number perform?

Question 11 What is the difference between using SPVADDS verses SPRIDEN?

Question 12 Can I copy a variable into the same application?

Question 13 What is the format of the name of the new variable?

Question 14 If all tables referenced in the variable must be listed in the **From** field, why aren't they joined in the rules?

Question 15 How does selecting a value in the variable sub-query work differently here than in other parts of the system?

Question 16 What is the function of the Mail Query Form (GUIMAIL)?

Question 17 The Letter blocks on what Student forms can also be used to add letters to the system?

Answer Key for Self Check

-
- Question 1** How many characters can be used when creating paragraph codes?
- a) one
 - b) three
 - c) five
 - d) up to seven**
-
- Question 2** A comment is required to create a paragraph.
- False. A comment is not required. However, it should be used to describe what is in your paragraph. The comment can be up to 240 characters.**
-
- Question 3** If the form is completely filled, you have to scroll to the bottom to enter a new code.
- False. You can click the Record Insert icon to enter the new code.**
-
- Question 4** On what form would you define a variable?
- a) SPVADDS
 - b) SPRIDEN
 - c) GLRVRBL**
-
- Question 5** What is the code for the other simple variables to be created?
- Your instructor will discuss this with you in class.**
-
- Question 6** The formatting command #CONCAT x places 'x' next to the preceding word without inserting a space between them. (True or False)
- True**
-

Continued on the next page

Answer Key for Self Check, Continued

-
- Question 7** What does a formatting command start with?
- A formatting command always starts with the pound (#) sign.**
-
- Question 8** 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 9** What is the **Print Command** field used for?
- 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 SCT Banner generated letters only.**
-
- Question 10** What function does the sequence number perform?
- The sequence number tells SCT Banner the order in which you would like your paragraphs printed in the letter.**
-
- Question 11** 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 12** 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 13** What is the format of the name of the new variable?
- It is the same as always. It should begin with an asterisk.**
-
- Question 14** 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.**
-

Continued on the next page

Answer Key for Self Check, Continued

Question 15 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 16 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 17 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: Reference

Overview

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

In this section These topics are covered in this section.

Topic	Page
Setup Forms and Where Used	D-2
Day-to-Day Forms and Setup Needed	D-3
Forms Job Aid	D-4

Setup Forms and Where Used

Purpose

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		

Day-to-Day Forms and Setup Needed

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

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

Forms Job Aid

Purpose

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	

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