



## LETTER GENERATION PROCESS & WORD MERGE

Data can be extracted from PeopleSoft Student Administration and PeopleSoft Contributor Relations system and used to generate letters, labels, lists, envelopes, etc. For Microsoft Word merge, the system places the extracted data into a comma delimited (.csv) file, which is a standard format readable by most word processing programs, including Microsoft Word. This document does not discuss the ways to assign communications, only the letter generation process.

### RUNNING THE LETTER GENERATION AND EXTRACTING THE DATA

Navigate to Process, Letter Generation. Enter Run Control ID, and click on Search or Enter if you already have a Run Control ID set up or click on Add if you want to create a new one.

#### General Parameters TAB

This first page is where one enters the General Parameters. An example is shown below.

Home > Build Community > Communications > Process > Letter Generation

General Parameters	Date/Merge Parameters	Checklist Parameters
Run Control ID:	CR	<a href="#">Report Manager</a> <a href="#">Process Monitor</a> <input type="button" value="Run"/>
<b>ID Selection</b>		
<input type="radio"/> All IDs <input checked="" type="radio"/> One Person ID <input type="radio"/> All Person IDs <input type="radio"/> One Org ID <input type="radio"/> All Org IDs		
Person ID:	<input type="text" value="0042031"/> <input type="button" value="Q"/>	Prospect, Sherman
Organization ID:	<input type="text"/>	
<b>Letter Code Selection</b>		<b>Missing Critical Data</b>
Letter Code:	<input type="text" value="P01"/> <input type="button" value="Q"/>	<input checked="" type="checkbox"/> Produce Communication
	Inquiry Acknowledgment	<input checked="" type="checkbox"/> Complete Communication
<b>Name and Address Usage</b>		
Address:	<input type="text" value="Home, Mailing, Permanent, Work"/>	
Addr Name:	<input type="text" value="Primary Full"/>	
Salutation:	<input type="text" value="Pref First, Prim First"/>	
<b>Joint Salutation Usage</b>		
Joint Name:	<input type="text"/>	
<b>ID Extract Name Usage</b>		
ID Extract Name Usage:	<input type="text" value="Pref First, Prim First"/>	
<input type="button" value="Save"/> <input type="button" value="Return to Search"/>		

A synopsis of the different items to be entered for this General Parameters tab.

### **ID Selection**

The ID area is self explanatory. One can enter in the select All Person IDs or Individual IDs. All IDs will pick up those individuals that have a communication assigned to them that has not been processed. Individual ID will pick up a certain communication for that particular individual who's ID is entered in box as long as it has not been processed already. The other three fill buttons: All IDs, One Org ID, All Org IDs are not in use by us at this time.

### **Letter Code Selection**

Enter in letter code you want processed for this run. Those individual(s) that have this letter code that have not been processed will be processed.

### **Missing Critical Data**

If critical data is missing, (i.e. address, name, etc) and these are checked, communication will be processed. If unchecked, communication will not go through.

\* Note: Even if they don't go through, after the run is successful, one can view those that didn't get processed and reason why they had an error.

## **Date/Merge Parameters TAB**

### **Extract File Path**

The extract path specifies where the data extract will be placed.

I.E : C:\PS\_3C\Letters\_Generated

### **Update Communication Letter Printer Date With, Update Communication Completed Date With**

Default is System Date. Use this one

### **Communication Date Range Selection**

Enter in date range you want letters picked up from.

Hint: Might want to make 'To Date' a date (year) in the future so as to not have to change it before you run it everytime.

### **Word Merge Parameters**

This will be the path where you store your templates.

I.E. : C:\PS\_3C\Shared\_Letters

Sort Option – Can sort by last name, first name or country/postal code

Send to Printer – Yes/No checkbox, do you want the letters to print immediately or be saved to a file for later printing. Recommend it be set to No.

## Checklist Parameters Tab

[Home](#) > [Build Community](#) > [Communications](#) > [Process](#) > **Letter Generation**

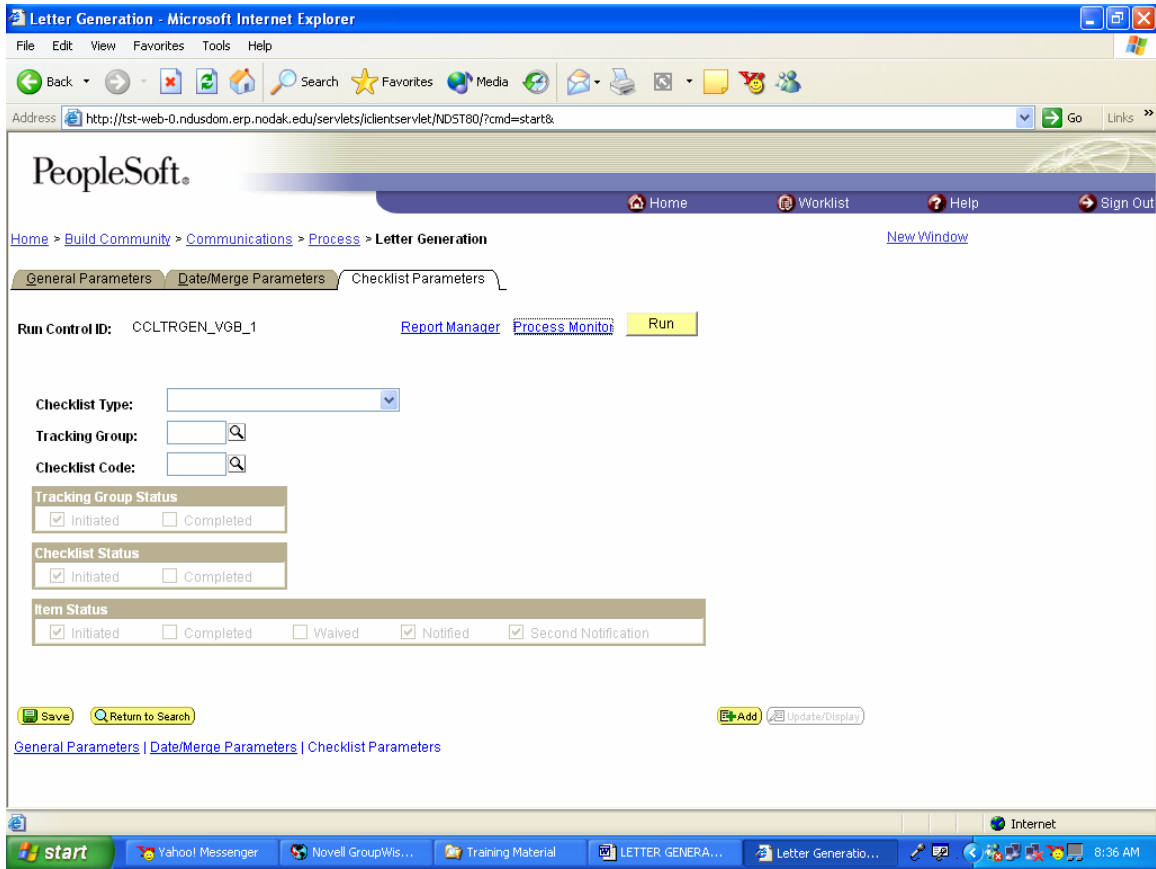
<a href="#">General Parameters</a>	<a href="#">Date/Merge Parameters</a>	<b><a href="#">Checklist Parameters</a></b>
Run Control ID: CR	<a href="#">Report Manager</a>	<a href="#">Process Monitor</a> <input type="button" value="Run"/>
<b>Extract File Path/Options</b> <input type="text"/> <input type="radio"/> JetForm <input checked="" type="radio"/> CSV		
<b>Update Communication Letter Printed Date With</b> <input type="radio"/> Communication Date <input checked="" type="radio"/> System Date <input type="radio"/> User Supplied Date <input type="text"/>	<b>Update Communication Completed Date With</b> <input type="radio"/> Communication Date <input checked="" type="radio"/> System Date <input type="radio"/> User Supplied Date <input type="text"/>	
<b>Communication Date Range Selection</b> *From Date: <input type="text" value="12/19/2001"/> <input type="button" value="..."/> *To Date: <input type="text" value="01/20/2002"/> <input type="button" value="..."/>		
<b>Word Merge parameters</b> Template Path: <input type="text" value="\\tea-sup-tdb01\teafs01\s800f71\fw\word\"/> Sort Option: <input type="text" value="Last Name, First Name"/> <input type="checkbox"/> Send to Printer		
<input type="button" value="Save"/>	<input type="button" value="Return to Search"/>	<input type="button" value="Add"/>
<a href="#">General Parameters</a>   <a href="#">Date/Merge Parameters</a>   <a href="#">Checklist Parameters</a>		

**Checklist Type:** Can choose what type of checklist you want. All current SA checklists are of the Requirements List type.

**Tracking Group:** If you have more than one checklist you want printed with this letter or if different individuals have this letter and different checklists and these checklists fall categorized under same tracking group, fill this box in with correct tracking group.

**Checklist Code:** Enter in checklist code here if a checklist is associated with this letter.

**Tracking Group Status, Checklist Status, Item Status:** Can leave as defaulted



## Kicking off the CCLTRGEN process

Once you have set all parameters, save and then click the Run button. You will be transferred to a Process Scheduler request page. Enter appropriate values and click ok to start the CCLTRGEN sqr. After clicking ok, you will be brought back to the Letter Generation process group pages. Clicking on the Process Monitor link will take to you view the CCLTRGEN process status. After the process has run successfully, you are ready for the next step.

Once the process is SUCCESS click on the details link (in blue)

Process Monitor - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media Print Mail Stop

Address http://tst-web-0.ndusdom.erp.nodak.edu/servlets/clientervlet/NDST80?cmd=start&

PeopleSoft.

Home Worklist Help Sign Out

Home > PeopleTools > Process Monitor > Inquire > Process Requests [New Window](#)

Process List **Server List**

View Process Request For

UserID: cgilbertson Process [ ] Last: 1 Days Refresh

Server [ ] Type: Process [ ] Instance: [ ] to [ ]

Name: Run Status:  View Job Items  Save On Refresh

Instance Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Details
11690	SQR Report	CCLTRGEN	cgilbertson	12/11/2003 2:28:47PM CST	Success	<a href="#">Details</a>

[Go back to Letter Generation](#)

[Process List](#) | [Server List](#)

start Yahoo! Messenger Novell GroupWis... Training Material LETTER GENERA... Process Monitor ... 8:50 AM

This will lead you to this page (example below)

Process Monitor - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <http://tst-web-0.ndusdom.erp.nodak.edu/servlets/jclientervlet/NDST80?cmd=start&>

PeopleSoft.

Home Worklist Help Sign Out

Home > PeopleTools > Process Monitor > Inquire > Process Requests [New Window](#)

**Process Detail**

**Process**

Instance: 11690      Type: SQR Report  
 Name: CCLTRGEN      Description: Letters Data Extract

**Run**      **Update Process**

Run Control ID: CCLTRGEN\_VGB\_1       Hold Request  
 Location: Server       Queue Request  
 Server: PSNT       Cancel Request  
 Recurrence:       Delete Request  
                                   Restart Request

**Date/Time**      **Actions**

Request Created On:	12/11/2003 2:28:51PM CST	<a href="#">Parameters</a>	Transfer
Run Anytime After:	12/11/2003 2:28:47PM CST	<a href="#">Message Log</a>	
Began Process At:	12/11/2003 2:29:01PM CST	Batch Timings	
Ended Process At:	12/11/2003 2:29:18PM CST	<a href="#">View Log/Trace</a>	

OK Cancel

Done      Internet

start      Yahoo! Messenger      Novell GroupWis...      Training Material      LETTER GENERA...      Process Monitor ...      8:53 AM

Click on View Log/Trace to bring you to the extract/run files. Below is a screen shot of this page.



Here you will see a list of files. To see if you have individuals that errored out and see how many were processed open up the Trace File. To get the extracts (.CSV files, .DAT File) saved to your PC, right click on file name and choose SAVE TARGET AS option. This will bring up a destination box of where you want to save these files. The path you want these saved in is **C:\PS\_3C\Letters\_Generated**. When you have this path chosen before you click on save, make sure you save it as type '**All Files**' Do this for the .CSV files and the .DAT files only.

**\*\* NOTE:** Remember to jot down the Instance number for you will need this later when you merging. I.E. The above instance number is 21425.

Once you have these saved to you PC, you will be able to start merging the .CSV files with your templates. On you desktop open up the letter gen shortcut. A box will appear and you want to click on 'Enable Macros'. On the bottom left corner you will see 'Enter Instance Number?' This is where you enter the instance number you have jotted down. If you have a shortcut for labels and/or envelopes on your PC desktop and want these merged also, open them and enter same instance number.

The merging will begin and depending on the size of the .CSV might or might not take a while.

Once merging is completed, they can be printed and sent out if applicable.