

# Web Based Mail Merge feature for documents and Email

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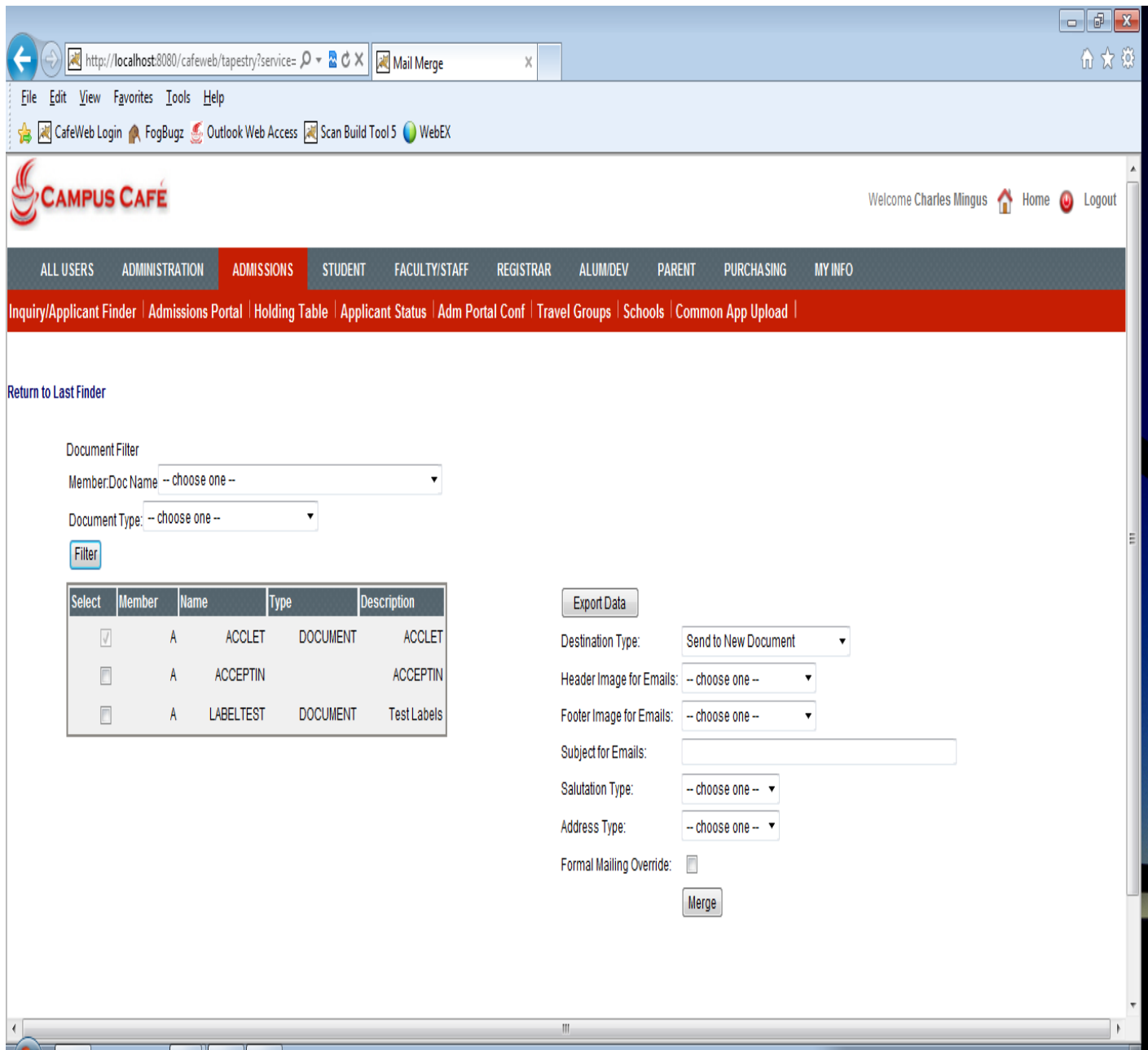
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## Merge Process

The People Finders support mail merge functions by clicking the “Mail Merge” Button.

The mail merge will apply to all persons selected on the People Finder.



The document to be merged will have an X in the check box and cannot be modified. You may however, select one additional document to print using the same data set. This would be useful if you needed to print a corresponding set of labels. Upon clicking the "Merge Link", the selected Word Document Template(s) will be invoked and merged document(s) will appear. The destination type will determine if the merge is an Email or Document. A header and footer image can be selected for an email.

### Default header and footer image url are a hierarchy as follows:

- As entered on in the drop downs on the page.
- ADPCOP header and footer images using USER ID (this will allow the individual user to have their own personalized header and footer).

- ADPCOP using school default called SCHLEMDEF. This ADPCOP record should contain the institutional defaults for head and footer. This will appear on the email even if there is no personal default or when a header and footer is not explicitly defined in the drop downs.

### The following must be configured so that the merge function will execute properly:

User's record in Café's User PC Options (ADPCOP) will hold where on the web server the user's Word Templates are located. The User ID in that table is the same as the SYUSER User that the person uses to login to cafeweb. If the user does not have an ADPCOP record, it will default to MSPARM MAILMERGE Parm 1, as shown below.

- MSPARM: MAILMERGE Seq 1, parms 1-4. Make sure the locations in 1-4 actually exist on the server.
  - Parm 1 is where the default Word Templates are located. (Templates are .docx that have the same name as what is selected from the workflow list).
  - Parm 2 is the destination of the merged docs (on the server)
  - Parm 3 is where the default header images live. This folder must exist.
  - Parm 4 is where the default footer images live. This folder must exist.

Additionally, each end user can have their own custom folder on the webserver or you can optionally map multiple users grouped by a business office or department such as admissions or alumni where they can keep their folders of word templates separate (and secured at the network access level) from other business areas. Each user can have their own ADPCOP entry which captures the user's custom locations to word document templates as well as header and footer images for email merges.

Needham Academy Information System

Reports Common Reports Custom Reports

User ID: JS

PC Identifier: JS

Display length is 70. Editable length is 120.

Doc Path: C:\scanware\

App Path:

Email Header Image:

Email Footer Image:

Mail Merge Path: C:\scanware\merge\templates\admissions

Delete Update Back

No Changes Pen...

ersion 2014-build-

Each user can have their own customized path to their images and templates

Needham Inst. of Software Development Information System

Reports Common Reports **Custom Reports**

**Program ID: MAILMERGE Sequence: 1**

MSPARM 1-4 MSPARM 5-7 MSPARM 8-10

Parm 1: C:\Program Files (x86)\CampusCafe\scanware\Documents

Description 1: SERVER DOC LOAD LOCATION

Default Value 1: c:\scanware\merge\templates

Parm 2: C:\Program Files (x86)\CampusCafe\scanware\Output

Description 2: SERVER DOC SAVE LOCATION

Default Value 2: c:\scanware\merge\output

Parm 3: C:\Tomcat-6.0.35\86\webapps\cafeweb\images

Description 3: SERVER HEADER IMAGE LOCATION

Default Value 3: c:\scanware\merge\headerImages

Parm 4: C:\Tomcat-6.0.35\86\webapps\cafeweb\images

Description 4: SERVER FOOTER IMAGE LOCATION

Default Value 4: c:\scanware\merge\footerImages

Delete Update Back

No Changes Pending

Version 2012 build 20

## Setting up the Mail Merge Word Template:

To create a word document merge template, you first create a word document that is named the same as its corresponding work flow item. For example, if you have a stock acceptance letter that will be sent to all accepted applicants, then you would first set up a work flow item connected to a document tracking template. Once the work flow item has been created, ensure that the work flow item properties are set to "Word Mergeable" as shown in the screen shot below. The type drop down menu is not required but we recommend that you set up your STPARM codes for SYWFTY to enable filtering on that field. Examples would be Letter, Email, Phone etc...



## Work Flow Definition Detail:

Id#:5 Tracking Member: Name: ACCLET

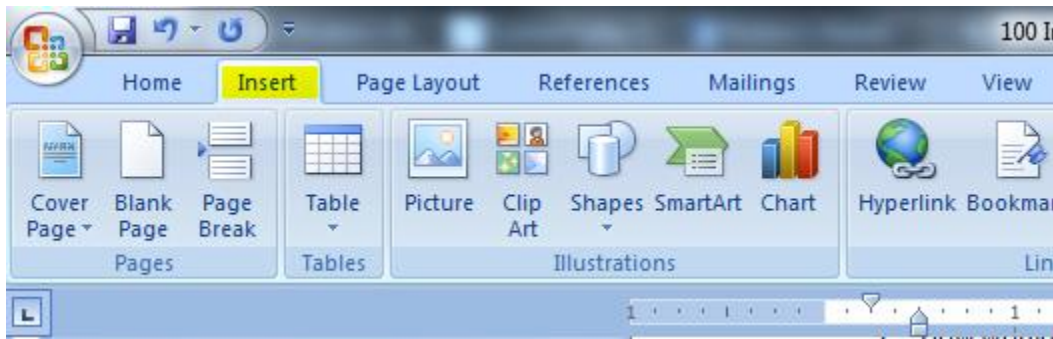
Information that is red is required

Type:	-- choose one --	Description:	ACCLET
Is Word Mergeable:	<input checked="" type="checkbox"/>	Assign User On Add:	<input type="checkbox"/>
Entered By:	660088110	Entered Date:	10/17/2011
		Changed By:	660088110
		Changed Date:	08/15/2012
<input type="button" value="Save"/> <input type="button" value="Delete"/> <input type="button" value="Cancel"/>			

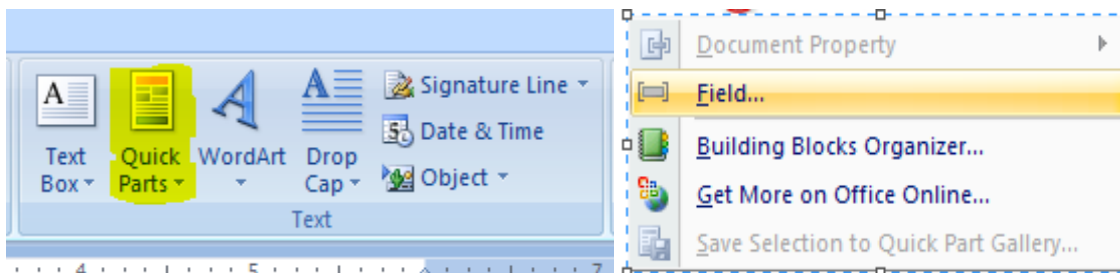
Powered by Campus Café

Once you have a word document saved with the same name as the work flow item, in this example the word document file would be named ACCLET.docx, you must then set up the word document to contain merge fields. The following screen shots will assist in helping you add acceptable merge fields into a word document.

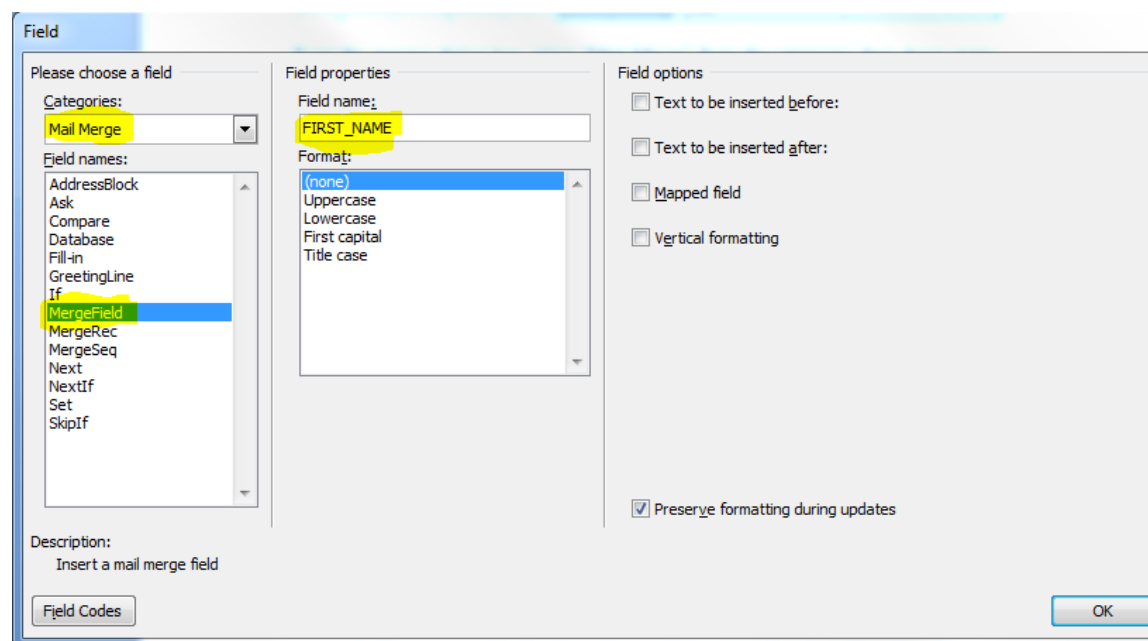
Open your word document and select the “insert” tab:



From the insert tab ribbon tools, select “Quick Parts” and then “Field”



From the ensuing dialog box select “Mail Merge” from the categories drop down menu and then “MergeField” from the list. In the Field Name text box type in your merge field name as shown below:



Click OK. Your new field name will show up within tags like this <FIRST\_NAME> in the body of your word document. You can place this field wherever you would like the data to be merged in the body of your letter.

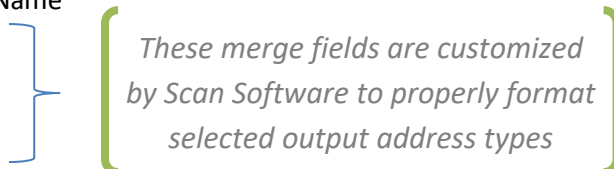
Once this is complete, you can copy the new template to the server according to where you set up your mail merge template folder in the instructions above. This work flow item will now show up in the document tracking printing screen and be linked to the corresponding word document on your server.

Please note that you can have an image in the word doc template if you are “Sending to New Document.” If you are sending an email, any image in the doc will not render correctly. This is what the “Header Image for Emails” and “Footer Image for Emails” are for.

## Quick Part Mail Merge Fields (Please note the underscore, not a blank space):

### Special Notes

Address\_Line\_1:5 are special merge fields that will pull in and format correctly the address lines from the address type selected. This is the recommended best practice. Other address fields such as Home\_Address, Mail\_Address etc... should only be used in special cases where the letter must be hard coded to always use that specific address. An example of how the letter should look would be something like this:

First_Name Last_Name	
Address_Line_1	
Address_Line_2	
Address_Line_3	
Address_Line_4	

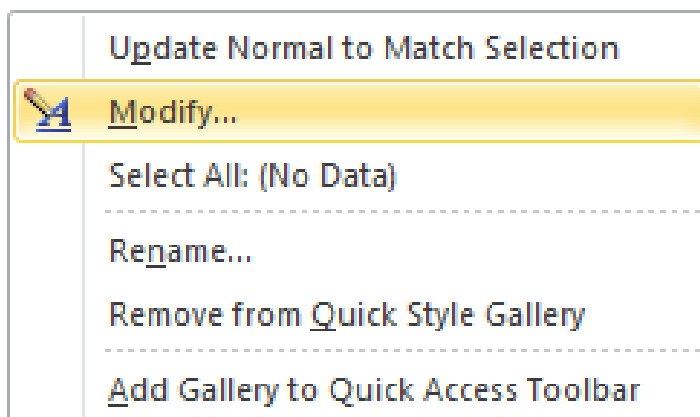
*These merge fields are customized by Scan Software to properly format selected output address types*

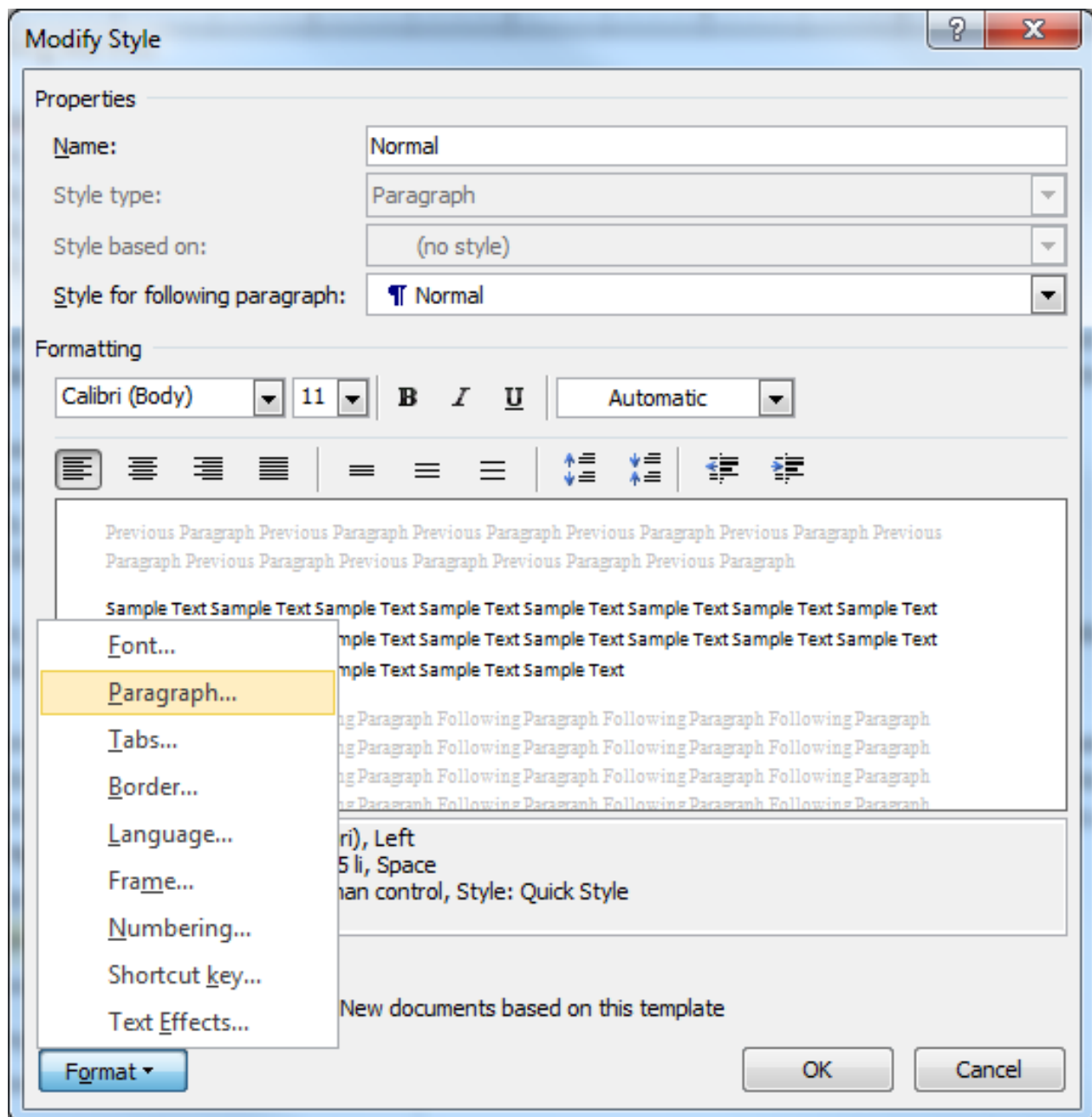
This method will properly space the address lines based on whether or not the address line exists. For example if the country is stored on the prospect or student record, the output would look like this:

Jane Smith  
500 Generic Street  
Any City, MA 02142  
Unites States

Address\_Line\_2 in this example would automatically collapse the space because there is not data (Address\_Line\_4 is typically the country code)

Additionally, note that the output of the formatting does not always respect your templates saved formatting if your local machine's formatting defaults are different. The easiest way to solve this problem is to ensure that the "Normal" paragraph format settings are set to single line and Opts after the paragraph like this (right click on your "Normal" setting on the home tab):







Paragraph

?

✕

Indents and Spacing

Line and Page Breaks

General

Alignment:

Left

▼

Outline level:

Body Text

▼

Indentation

Left:

0"

▲▼

Right:

0"

▲▼

Special:

(none)

▼

By:

▲▼

☐ Mirror indents

Spacing

Before:

0 pt

▲▼

After:

0 pt

▲▼

Line spacing:

Single

▼

At:

▲▼

☒ Don't add space between paragraphs of the same style

Preview

Previous Paragraph Previous Paragraph Previous Paragraph Previous Paragraph Previous Paragraph Previous Paragraph Previous Paragraph Previous Paragraph Previous Paragraph Previous Paragraph

Sample Text Sample Text Sample Text Sample Text Sample Text Sample Text Sample Text Sample Text Sample Text Sample Text Sample Text Sample Text Sample Text Sample Text Sample Text Sample Text Sample Text Sample Text Sample Text

Following Paragraph Following Paragraph Following Paragraph Following Paragraph Following Paragraph Following Paragraph Following Paragraph Following Paragraph Following Paragraph Following Paragraph

Tab...

Set As Default

OK

Cancel

## Merge Field Names and Corresponding Table Locations

Note: some field names, for example DEGREE\_MAJOR Decoded, are not a field names from the database but are decoded descriptions from our parameter table STPARM.

Table	Field Name	Web Merge Name	Web Export Name
STBIOS	SALUTATION	Salutation	Salutation
STBIOS	LAST_NAME	Last_Name	Last Name
STBIOS	FIRST_NAME	First_Name	First Name
STBIOS	MIDDLE_NAME	Middle_Name	Middle Name
STBIOS	ID_NUMBER	Id_Number	Id Number
STBIOS	SUFFIX	Suffix	Suffix
STBIOS	SOCIAL_SEC_NUMBER	SSN	SSN
STBIOS	BIRTH_DATE	Birth_Date	Birth Date
STBIOS	NICK_NAME	Nick_Name	Nick Name
STBIOS	SEX	Gender	Gender
STBIOS	CONTINUING_ED_CODE	Continuing_Ed_Code	Continuing Ed Code
Based on address type drop down selection		Address_Line_1	NONE
Based on address type drop down selection		Address_Line_2	NONE
Based on address type drop down selection		Address_Line_3	NONE
Based on address type drop down selection		Address_Line_4	NONE
Based on address type drop down selection		Address_Line_5	NONE
STBIOS	HOME_ADDRESS_ONE	Home_Street1	Home Street1
STBIOS	HOME_ADDRESS_TWO	Home_Street2	Home Street2
STBIOS	HOME_ADDRESS_THREE	Home_Street3	Home Street3
STBIOS	HOME_CITY	Home_City	Home City
STBIOS	HOME_STATE	Home_State	Home State
STBIOS	HOME_ZIP	Home_Zip	Home Zip
STBIOS	HOME_ZIP_EXTENSION	Home_Zip_Ext	Home Zip Ext
STBIOS	HOME_PROVINCE	Home_Province	Home Province
STBIOS	HOME_COUNTRY	Home_Country	Home Country
GENERIC!	Home Phone Number	Home_Phone	Home Phone
STBIOS	HOME_PHONE_AREA	Home_Phone_Area	Home Phone Area
STBIOS	HOME_PHONE_EXCHANGE	Home_Phone_Exchange	Home Phone Exchange
STBIOS	HOME_PHONE_NUMBER	Home_Phone_Num	Home Phone Num
STBIOS	BILLING_ADDRESS_ONE	Bill_Street1	Bill Street1
STBIOS	BILLING_ADDRESS_TWO	Bill_Street2	Bill Street2
STBIOS	BILLING_ADDRESS_THREE	Bill_Street3	Bill Street3
STBIOS	BILLING_CITY	Bill_City	Bill City
STBIOS	BILLING_STATE	Bill_State	Bill State
STBIOS	BILLING_ZIP	Bill_Zip	Bill Zip
STBIOS	BILLING_ZIP_EXTENSION	Bill_Zip_Ext	Bill Zip Ext
STBIOS	BILLING_PROVINCE	Bill_Province	Bill Province

STBIOS	BILLING_COUNTRY	Bill_Country	Bill Country
GENERIC!	Billing Phone Number	Bill_Phone	Bill Phone
STBIOS	BILLING_PHONE_AREA	Bill_Phone_Area	Bill Phone Area
STBIOS	BILLING_PHN_EXCHANGE	Bill_Phone_Exchange	Bill Phone Exchange
STBIOS	BILLING_PHN_NUMBER	Bill_Phone_Num	Bill Phone Num
STBIOS	MAIL_ADDRESS_ONE	Mail_Street1	Mail Street1
STBIOS	MAIL_ADDRESS_TWO	Mail_Street2	Mail Street2
STBIOS	MAIL_ADDRESS_THREE	Mail_Street3	Mail Street3
STBIOS	MAIL_CITY	Mail_City	Mail City
STBIOS	MAIL_STATE	Mail_State	Mail State
STBIOS	MAIL_ZIP	Mail_Zip	Mail Zip
STBIOS	MAIL_ZIP_CODE_EXT	Mail_Zip_Ext	Mail Zip Ext
STBIOS	MAIL_PROVINCE	Mail_Province	Mail Province
STBIOS	MAIL_COUNTRY	Mail_Country	Mail Country
GENERIC!	Mail Phone Number	Mail_Phone	Mail Phone
STBIOS	MAIL_PHONE_AREA	Mail_Phone_Area	Mail Phone Area
STBIOS	MAIL_PHN_EXCHANGE	Mail_Phone_Exchange	Mail Phone Exchange
STBIOS	MAIL_PHONE_NUMBER	Mail_Phone_Num	Mail Phone Num
STBIOS	RETURN_MAIL_CODE	Mail_Code	NONE
STBIOS	RETURN_MAIL_CODE decoded	Mail_Code_Decoded	NONE STPARM SBRMCD
GENERIC!	ALL MAJORS	Inq_Majors	Inq Majors
STBIOS	ADMISSIONS_INQ_MAJOR	Adm_Inq_Major	Adm Inq Major
STBIOS	ADMISSIONS_INQ_MAJOR decoded	Adm_Inq_Major_Decoded	Adm Inq Major Decoded
STBIOS	ADMISSIONS_INQ_MAJ_02	Adm_Inq_Major2	Adm Inq Major 2
STBIOS	ADMISSIONS_INQ_MAJ_02 decoded	Adm_Inq_Major2_Decoded	Adm Inq Major 2 Decoded
STBIOS	ADMISSIONS_INQ_MAJ_03	Adm_Inq_Major3	Adm Inq Major 3
STBIOS	ADMISSIONS_INQ_MAJ_03 decoded	Adm_Inq_Major3_Decoded	Adm Inq Major 3 Decoded
STBIOS	ADMISSIONS_INQ_MINOR	Adm_Inq_Minor	Adm Inq Minor
STBIOS	ADMISSIONS_INQ_MINOR decoded	Adm_Inq_Minor_Decoded	Adm Inq Minor Decoded
STBIOS	ADMISSIONS_ENT_SEM	Adm_Ent_Sem	Adm Ent Sem
STBIOS	ADMISSIONS_ENT_SEM	Adm_Ent_Sem_Decoded	Adm Ent Sem Decoded
STBIOS	ADM_PROGRESS_CODE	Prog_Code	Prog Code
STBIOS	ADMISSIONS_SITE	Admissions_Site	Admissions Site
STBIOS	ADMISSIONS_SITE decoded	Admissions_Site_Decoded	Not in Export STPARM SBPRCC
STBIOS	ADMISSIONS_RES_CODE	Resident_Code	Resident Code
STBIOS	TRANSFER_CODE	Transfer_Code	Transfer Code
STBIOS	HIGH_SCHOOL_CODE	High_School	High School
STBIOS	HIGH_SCHOOL_CODE decoded	High_School_Decoded	High School Decoded
STBIOS	PREV_ATTED_COLLEGE	Last_College	Last College
STBIOS	PREV_ATTED_COLLEGE decoded	Last_College_Decoded	Last College Decoded
STBIOS	ETHNIC_CODE	Ethnic_Code	Ethnic Code

STBIOS	ETHNIC_CODE decoded	Ethnic_Code_Decoded	Ethnic Code Decoded
STBIOS	FIN_AID_CODE	Financial_Aid_Code	Financial Aid Code
STBIOS	FIN_AID_CODE decoded	Financial_Aid_Code_Decoded	Financial Aid Code Decoded
STBIOS	ADMISSIONS_PT_CODE decoded	Part_Time_Code_Decoded	Part Time Code Decoded
STBIOS	VETERAN_CODE	Veteran_Code	Veteran Code
STBIOS	VETERAN_CODE decoded	Veteran_Code_Decoded	Veteran Code Decoded
STBIOS	PRIVACY_CODE	Privacy_Code	Privacy Code
STBIOS	PRIVACY_CODE decoded	Privacy_Code_Decoded	Privacy Code Decoded
STBIOS	SITE_NUMBER	Site_Code	Site Code
STBIOS	SITE_NUMBER decoded	Site_Code_Decoded	Site Code Decoded
STBIOS	PREFERRED_ADDRESS_CD	Preferred_Address_Code	Preferred Address Code
STBIOS	PREFERRED_ADDRESS_CD decoded	Preferred_Address_Code_Decoded	Preferred Address Code Decoded
STBIOS	INTL_STUDENT_CODE	International_Student_Code	International Student Code
STBIOS	INTL_STUDENT_CODE decoded	International_Student_Code_Decoded	International Student Code Decoded
STBIOS	US_CITIZENSHIP	US_Citizenship	US Citizenship
STBIOS	US_CITIZENSHIP decoded	US_Citizenship_Decoded	US Citizenship Decoded
STBIOS	HIGH_SCHOOL_GRAD_YR	HS_Grad_Year	HS Grad Year
STBIOS		Advisor_1	
STBIOS		Advisor_1_Name	
STBIOS		Advisor_2	
STBIOS		Advisor_2_Name	
STBIOS	EMPLOYER_NAME	Employer_Name	
STBIOS	CONTACT_FIRST_NAME +CONTACT_LAST_NAME	Contact_Name	Contact Name
STBIOS	EMPLOYER_ADDRESS_ONE	Employer_Address1	Employer Address1
STBIOS	EMPLOYER_ADDRESS_TWO	Employer_Address2	Employer Address2
STBIOS	EMPLOYER_CITY	Employer_City	Employer City
STBIOS	EMPLOYER_STATE	Employer_State	Employer State
STBIOS	EMPLOYER_ZIP	Employer_Zip	Employer Zip
STBIOS	EMPLOYER_COUNTRY	Employer_Country	Employer Country
STBIOS	EMPLOYER_SORT_FIELD	Employer_Sort_Field	Employer Sort Field
STPARM	SBCLOR (STPARM CODE)	Counselor_Name	Counselor Name
STPARM	SBCLOX (STPARM CODE)	Counselor_Title	Counselor Title
STPARM	SBCLOY (STPARM CODE)	Counselor_Email	Counselor Email
STPARM	SBCLOZ (STPARM CODE)	Counselor_Phone_Number	Counselor Phone Number
STPARM	SBCLOG (STPARM CODE)	Counselor_Gender	Counselor Gender
ADMAST	APPLIC_DATE	App_Date	App Date
NONE	App date decoded (does not exist?)	None	None
ADMAST	APPLIED_FOR_MAJOR	Applied_For_Major	Applied For Major
ADMAST	APPLIED_FOR_MAJOR decoded	Applied_For_Major_Decoded	Applied For Major Decoded
ADMAST	ACCEPT_MAJOR	Accept_Major	Accept Major
ADMAST	ACCEPT_MAJOR decoded	Accept_Major_Decoded	Accept Major Decoded

ADMAST	DECISION_DATE	Decision_Date	Decision Date
ADMAST	DECISION_DATE decoded	Decision_Date_Decoded	Decision Date Decoded
ADMAST	SCHOOL_DECISION	School_Decision	None
ADMAST	SCHOOL_DECISION decoded	School_Decision_Decoded	None (STPARM ACDECD)
ADMAST	COMMITMENT_DATE	Commitment_Date	Commitment Date
ADMAST	COMMITMENT_DATE decoded	Commitment_Date_Decoded	Commitment Date Decoded
ADMAST	DEPOSIT_DATE	Deposit_Date	Decision Date
ADMAST	DEPOSIT_DATE decoded	Deposit_Date_Decoded	Deposit Date Decoded
ADMAST	DATE_ACCEPTED	Date_Accepted	Date Accepted
ADMAST	DATE_ACCEPTED decoded	Date_Accepted_Decoded	Date Accepted Decoded
ADMAST	DATE_REPLIED	Date_Replied	Date Replied
ADMAST	DATE_REPLIED decoded	Date_Replied_Decoded	Date Replied Decoded
ADMAST	APP_AMOUNT	App_Amount	App Amount
ADMAST	TUITION_DEP_AMT	Tuition_Dep_Amount	Tuition Dep Amount
ADMAST	HOUSING_DEP_AMT	Housing_Dep_Amount	Housing Dep Amount
ADMAST	APP_COMPLETED	App_Completed	App Completed
ADMAST	SCHOOL_DIV_APP	School_Div_APP	School Div APP
ADMAST	SCHOOL_DIV_ACC	School_Div_ACC	School Div ACC
ADMAST	ACTION_TYPE	Action_Type	Action Type
ADMAST	ACTION_TYPE decoded	Action_Type_Decoded	Action Type Decoded
ADMAST	COND_ACC	Cond_ACC	Cond ACC
ADMAST	COND_ACC decoded	Cond_ACC_Decoded	Cond ACC Decoded
SYUSER	USERNAME	Username	Username
SYUSER	PASSWORD	Password	Password
SYUSER	LOGIN_COUNT	Login_Count	Login Count
SYUSER	LAST_LOGIN_DATE	Last_Login_Date	Last Login Date
SYUSER	LAST_LOGIN_DATE decoded	Last_Login_Date_Decoded	Last Login Date Decoded
SYUSER	MAINTENANCE_PWD	Maintenance_Password	None
ADDTRK	PLEDGED_AMOUNT	Amount_Original	Amount_Original
ADDTRK	AMOUNT_DUE	Amount_Due	Amount_Due
ADDTRK	PAID_AMOUNT	Amount_Paid	Amount_Paid
ADDTRK	FIRST_COMMENT	Comment_1	Comment_1
ADDTRK	SECOND_COMMENT	Comment_2	Comment_2
ADDTRK	THIRD_COMMENT	Comment_3	Comment_3
ADDTRK	FOURTH_COMMENT	Comment_4	Comment_4
ADDTRK	FIFTH_COMMENT	Comment_5	Comment_5
ADDTRK	SIXTH_COMMENT	Comment_6	Comment_6
ADDTRK	SEVENTH_COMMENT	Comment_7	Comment_7
ADDTRK	EIGHT_COMMENT	Comment_8	Comment_8
ADDTRK	FIRST_REQ_DATE	Request_Date	
STSALU	FORMAL_CODE	Formal_Code	Formal_Code
STSALU	FORMAL_SAL	Formal_Sal	Formal_Sal
STSALU	FORMAL_DEAR	Formal_Dear	Formal_Dear

STSALU	INFORMAL_CODE	Informal_Code	Informal_Code
STSALU	INFORMAL_SAL	Informal_Sal	Informal_Sal
STSALU	INFORMAL_DEAR	Informal_Dear	Informal_Dear
STSALU	ALUMNI_CODE	Alumni_Code	Alumni_Code
STSALU	ALUMNI_SAL_1	Alumni_Sal_1	Alumni_Sal_1
STSALU	ALUMNI_SAL_2	Alumni_Sal_2	Alumni_Sal_2
STSALU	ALUMNI_DEAR	Alumni_Dear	Alumni_Dear
STSALU	VERY_INFORMAL_CODE	Very_Informal_Code	Very_Informal_Code
STSALU	VERY_INFORMAL_SAL	Very_Informal_Sal	Very_Informal_Sal
STSALU	VERY_INFORMAL_DEAR	Very_Informal_Dear	Very_Informal_Dear
STSALU	CUSTOM_CODE	Custom_Code	Custom_Code
STSALU	CUSTOM_SAL	Custom_Sal	Custom_Sal
STSALU	CUSTOM_DEAR	Custom_Dear	Custom_Dear
STSALU	CUSTOM_CODE_2	Custom_Code_2	
STSALU	CUSTOM_SAL_2	Custom_Sal_2	
STSALU	CUSTOM_DEAR_2	Custom_Dear_2	
STSALU	RECOGNITION_SAL	Recognition_Sal	
STSALU	<b>Based on Salutation Selection</b>	Formatted_Sal	NONE
STSALU	<b>Based on Salutation Selection</b>	Formatted_Dear	NONE
ALFUND	FUND_DESCRIPTION_1	Fund_Description	NONE
ALDONA	NON_DEDUCT_AMT	Non_Deductible_Amount	NONE
ALDONA	COMMENT	Gift_Comment_1	NONE
ALDONA	COMMENT_TWO	Gift_Comment_2	NONE
ALDONA	AMOUNT_PAID	Paid_To_Date	NONE
ALDONA	APPEAL	Appeal_Code	
		Appeal_Code_Decoded	
ALDONA	CAMPAIGN	Campaign_Code	
		Campaign_Code_Decoded	
ALDONA	IN_MEMORIAM_CONS_NUM	In_Memorial_Cons_Num	
		In_Memorial_Name	
ALDONA	GIFT_PURPOSE	Gift_Purpose	
ALDONA	MATCH_GIFT_CONS_NUM	MG_Constituent_Number	
		MG_Constituent_Name	
ALDONA	PRIMARY_CONS	Primary_Cons_Code	
		Primary_Cons_Code_Decoded	
ALDONA	REQUEST_DATE	Request_Date	
TRK	COURSE_NUMBER / COURSE_SECTION	Course_And_Section	
TRK	CURRENT_SEMESTER	Course_Semester	
TRK	REG_SYLLABUS_OID	Syllabus_Decoded	
RGCRSE	PROF_ID_NUMBER (Name)	Instructor	
RGCRSE	BEGIN_DATE	Course_Start_Date	
RGCRSE	END_DATE	Course_End_Date	

RGCRSE	COURSE_TITLE	Course_Title	
RGENRL	ENROLLMENT_DATE	Enrollment_Start	NONE
RGENRL	ENROLLMENT_END_DATE	Enrollment_End	NONE
RGENRL	LAST_ATTEND_DATE	Last_Attend_Date	NONE
NONE	<b>Will output a '\$' without quotes</b>	Dollar_Sign	NONE
TRK	DUE_DATE	Due_Date	NONE
TRK	SUBMITTED_DATE	Submitted_Date	NONE
TRK	COMPLETED_DATE	Completed_Date	NONE
TRK	DUE_TIME	Due_Time	NONE
TRK	SUBMITTED_TIME	Submitted_Time	NONE
RGDEGR	DEGREE_MAJOR	Degree_Major	NONE
RGDEGR	DEGREE_MAJOR Decoded	Degree_Major_Decoded	NONE

**When using the school finder sub-module – use the address\_line\_x solution when a formatted address is needed**

ADSCHL	SCHOOL_NAME	Name	No Export on School Finder
ADSCHL	ALPHA_SORT_FIELD	Sort_Name	No Export on School Finder
ADSCHL	SCHOOL_CODE	CEEB	No Export on School Finder
ADSCHL	SCHOOL_SUFFIX	Suffix	No Export on School Finder
ADSCHL	ADDRESS_ONE	Street1 (use Address_Line_X)	No Export on School Finder
ADSCHL	ADDRESS_TWO	Street2 (use Address_Line_X)	No Export on School Finder
ADSCHL	ADDRESS_THREE	Street3 (use Address_Line_X)	No Export on School Finder
ADSCHL	CITY	City (use Address_Line_X)	No Export on School Finder
ADSCHL	STATE	State (use Address_Line_X)	No Export on School Finder
ADSCHL	ZIP	Zip (use Address_Line_X)	No Export on School Finder
ADSCHL	ZIP_EXTENSION	Zip_Ext (use Address_Line_X)	No Export on School Finder
ADSCHL	COUNTRY	Country (use Address_Line_X)	No Export on School Finder
ADSCHL	PROVINCE	Province (use Address_Line_X)	No Export on School Finder
ADSCHL	AREA_CODE+EXCHANGE+PHONE	Phone	No Export on School Finder
ADSCHL	CONTACT_FIRST_NAME	First_Name*	No Export on School Finder
ADSCHL	CONTACT_MID_NAME	Middle_Name*	No Export on School Finder
ADSCHL	CONTACT_LAST_NAME	Last_Name*	No Export on School Finder
ADSCHL	CONTACT_TITLE	Title*	No Export on School Finder
ADSCHL	EMAIL_ADDRESS	Email*	No Export on School Finder
View			
AR_BALANCE_WITH_AID	AMOUNT_DUE	Amount_Due_AR_Bal	None
View			
AR_BALANCE_WITH_AID	TOTAL_BALANCE	Actual_Cash_Balance	None

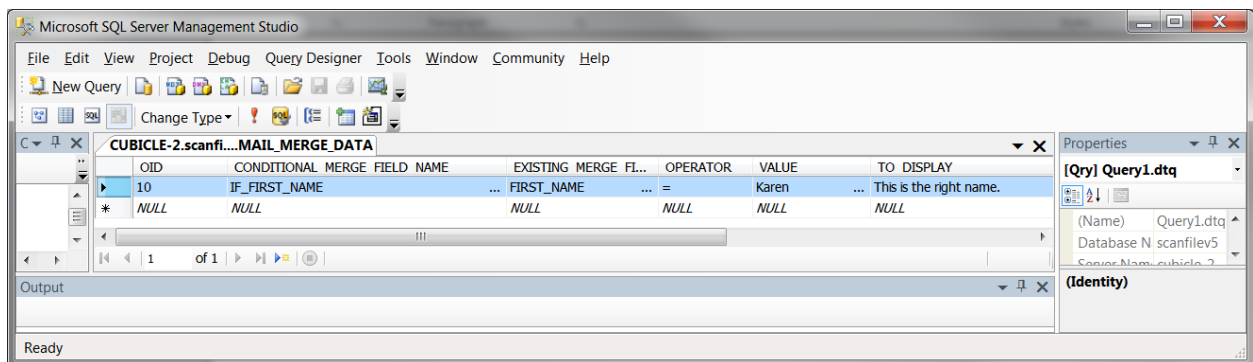
\*This data is associated with the contact information of the school. For example a school counselor or administrator

## Setting Up Conditional Output with Mail Merge

Using table Mail\_Merge\_Data, you can set up “if statements” to only print certain text when specific values fit a specific criteria. Here are some examples:

To display text based on value of mail merge field First\_Name:

If mail merge field First\_Name = Karen, then display the text: “This is the right name.” In order to do this you need to add an entry into the Mail\_Merge\_Data table, like below:



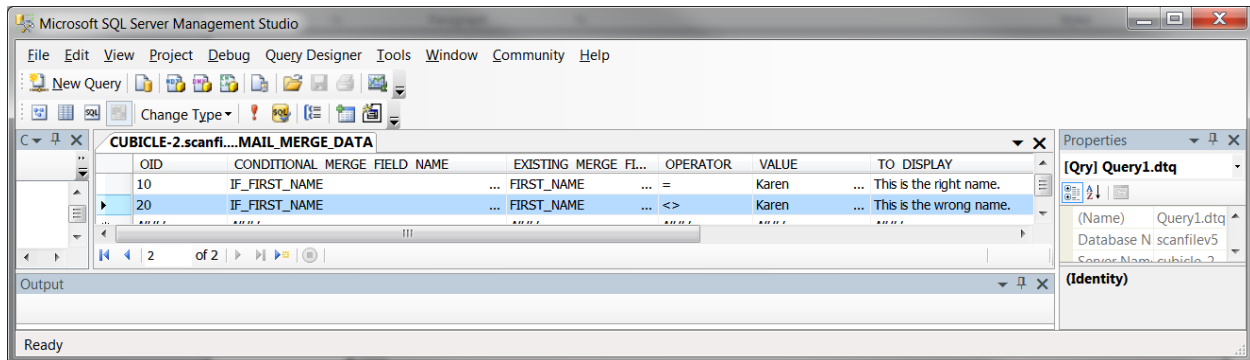
The value of the oid does not matter, as long as it is unique. The CONDITIONAL\_MERGE\_FIELD\_NAME can be whatever you want it to be.

Now, when you build your mail merge document, you can add a new Quick Part field called IF\_FIRST\_NAME (or whatever you decided to name it) that will display “This is the right name.” only if the quick part field FIRST\_NAME results in “Karen”. For any other result IF\_FIRST\_NAME will return blank.

For string values, the operator can be either = or <>. For int values, the operator can be either = <> <= > or >=. If you want to do an “else statement”, you can instead add 2 rows with the same CONDITIONAL\_MERGE\_FIELD\_NAME. One row using the =, and one row using the <>. For example:

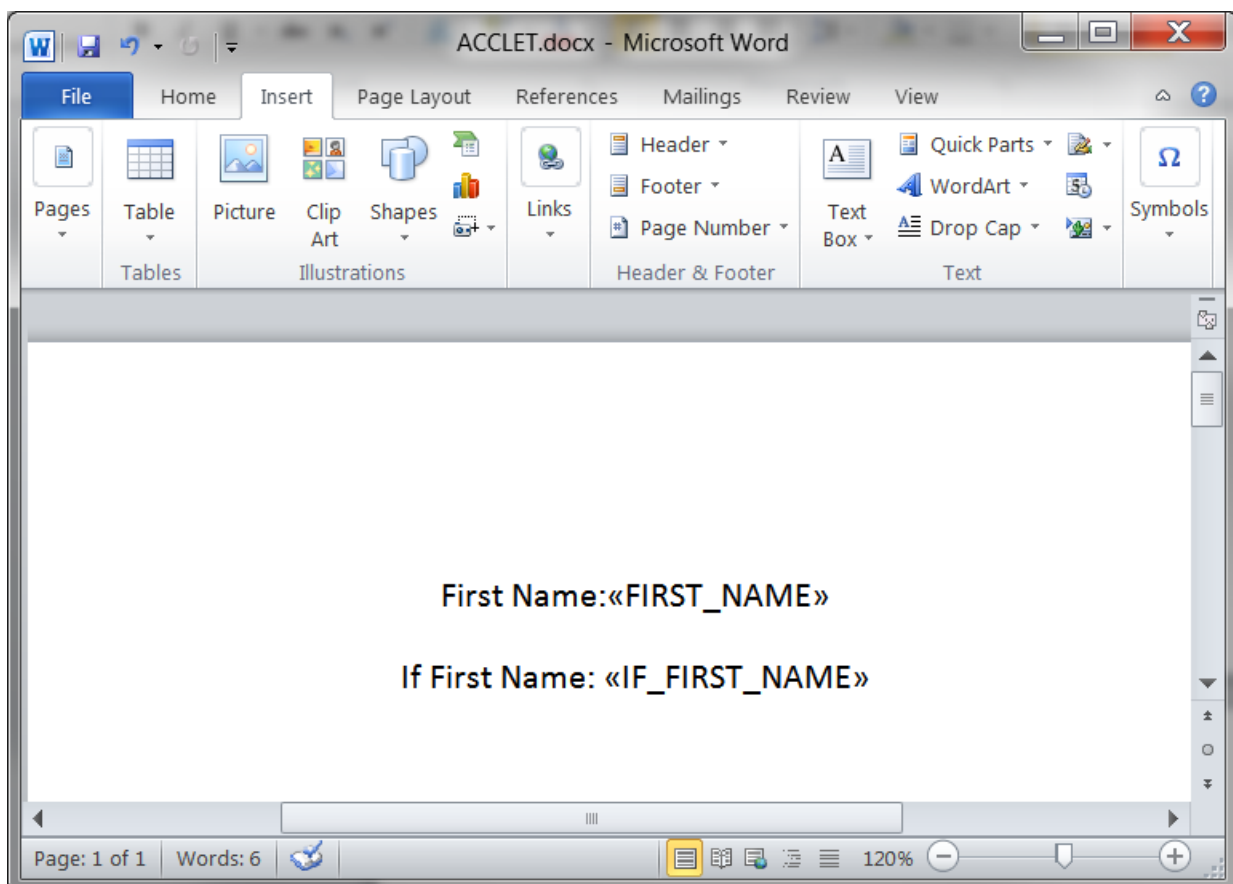


### Else Statement:

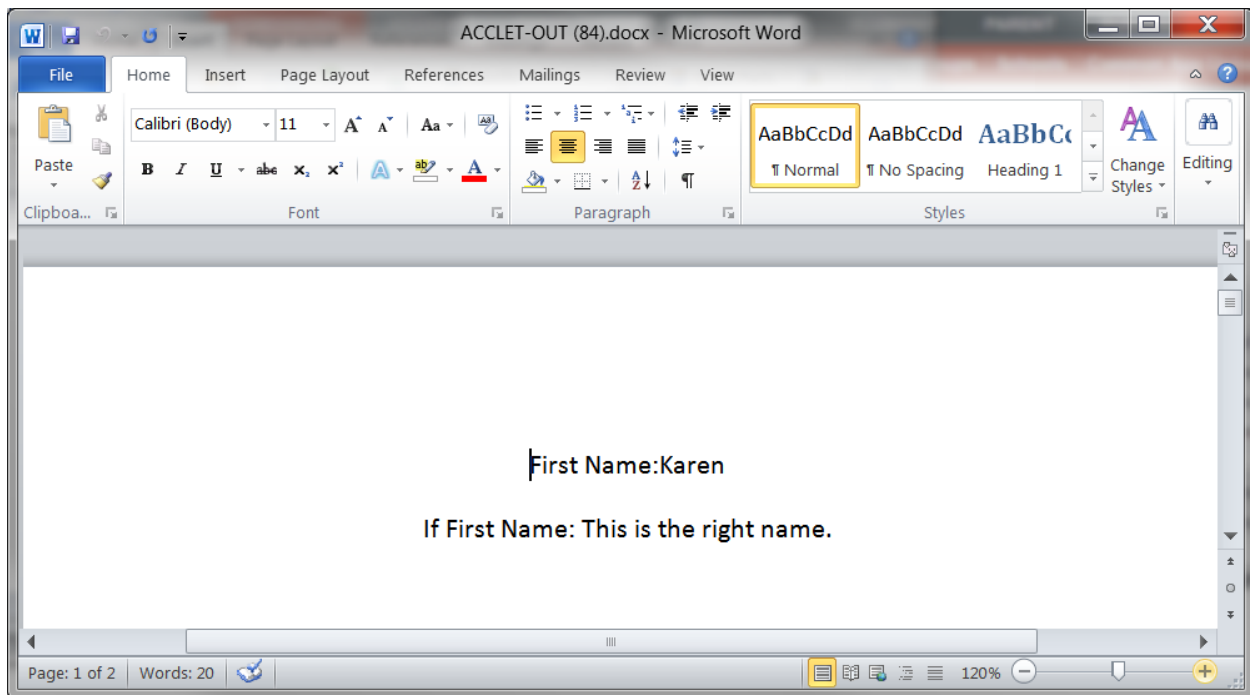


This is saying if FIRST\_NAME=Karen, print "This is the right name." ELSE (if FIRST\_NAME <> Karen) print "This is the wrong name."

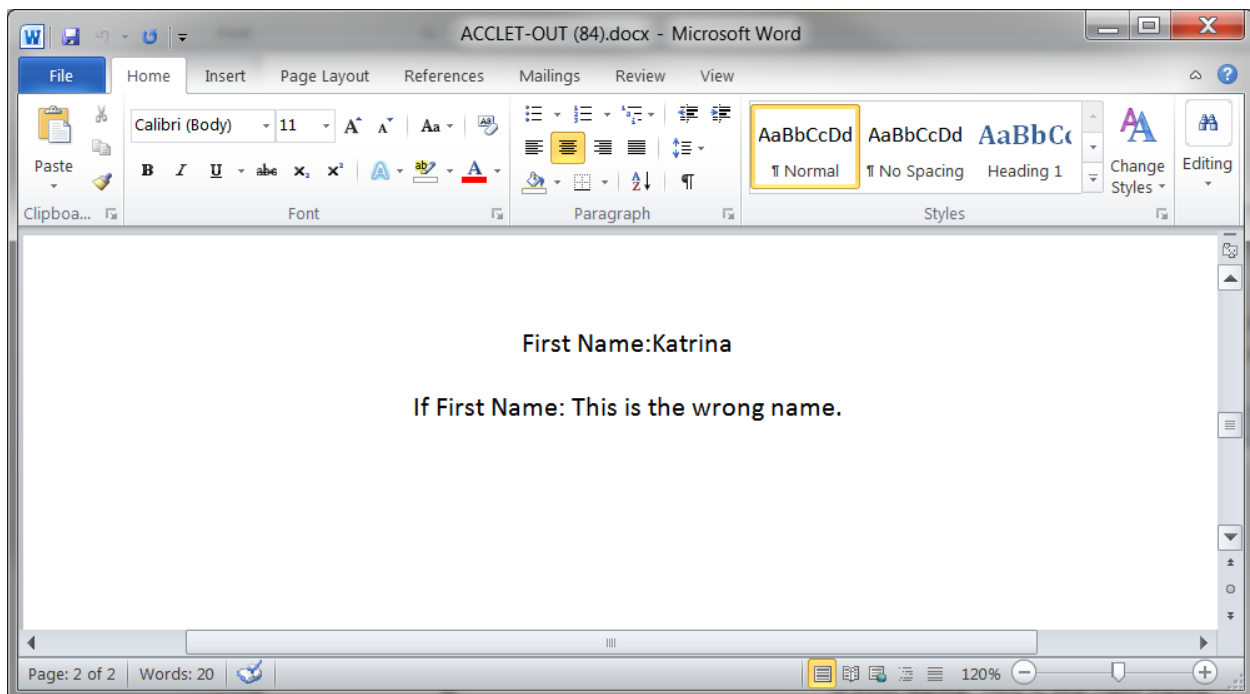
Now, creating a mail merge template with 2 Quick Part fields (FIRST\_NAME is just to confirm correct output. It is not needed):



Will give you this result for Karen Holbrook:

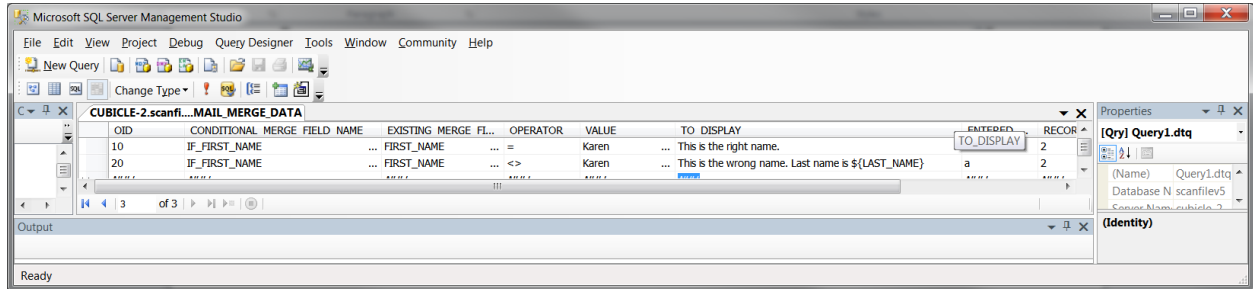


And this result for Katrina Holeinone:



## Displaying Other Quick Part Results as a Conditional Result

In many cases, you may need to display a different Quick Part result as the result of your conditional statement. For example, if a person does not have a nick name, you may want to display the first name. This can be done by putting special characters around the Quick Part name in the TO\_DISPLAY column. For example, putting \${LAST\_NAME} indicates to the program that what you actually want to display is the value of the Quick Part field LAST\_NAME. Here is an example that will display the last name only if the first name is not Karen:



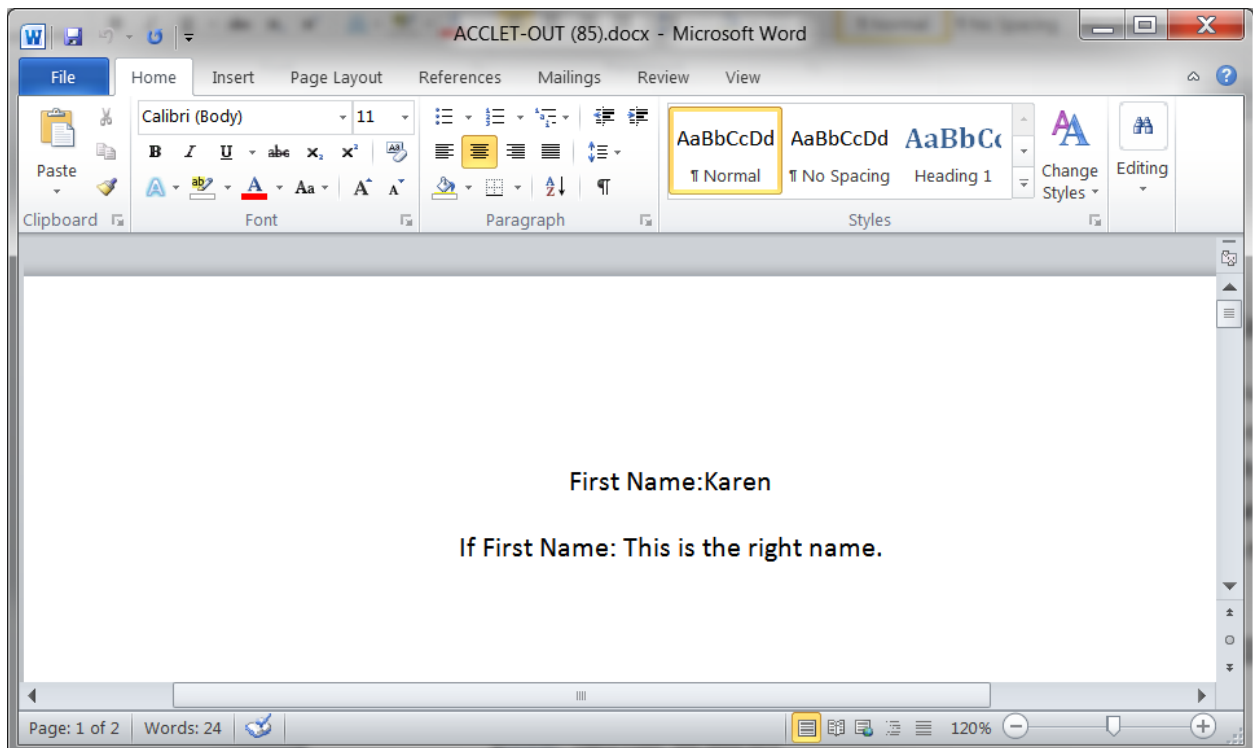
The screenshot shows the Microsoft SQL Server Management Studio interface. The main window displays a query result table titled 'CUBICLE-2.scanfile5.MAIL\_MERGE\_DATA'. The table has columns: OID, CONDITIONAL, MERGE, FIELD, NAME, EXISTING, MERGE, FL..., OPERATOR, VALUE, TO\_DISPLAY, and RECOR. The data is as follows:

OID	CONDITIONAL	MERGE	FIELD	NAME	EXISTING	MERGE	FL...	OPERATOR	VALUE	TO_DISPLAY	RECOR
10	IF_FIRST_NAME	...	FIRST_NAME	...	=				Karen	... This is the right name.	2
20	IF_FIRST_NAME	...	FIRST_NAME	...	<>				Karen	... This is the wrong name. Last name is \${LAST_NAME}	2

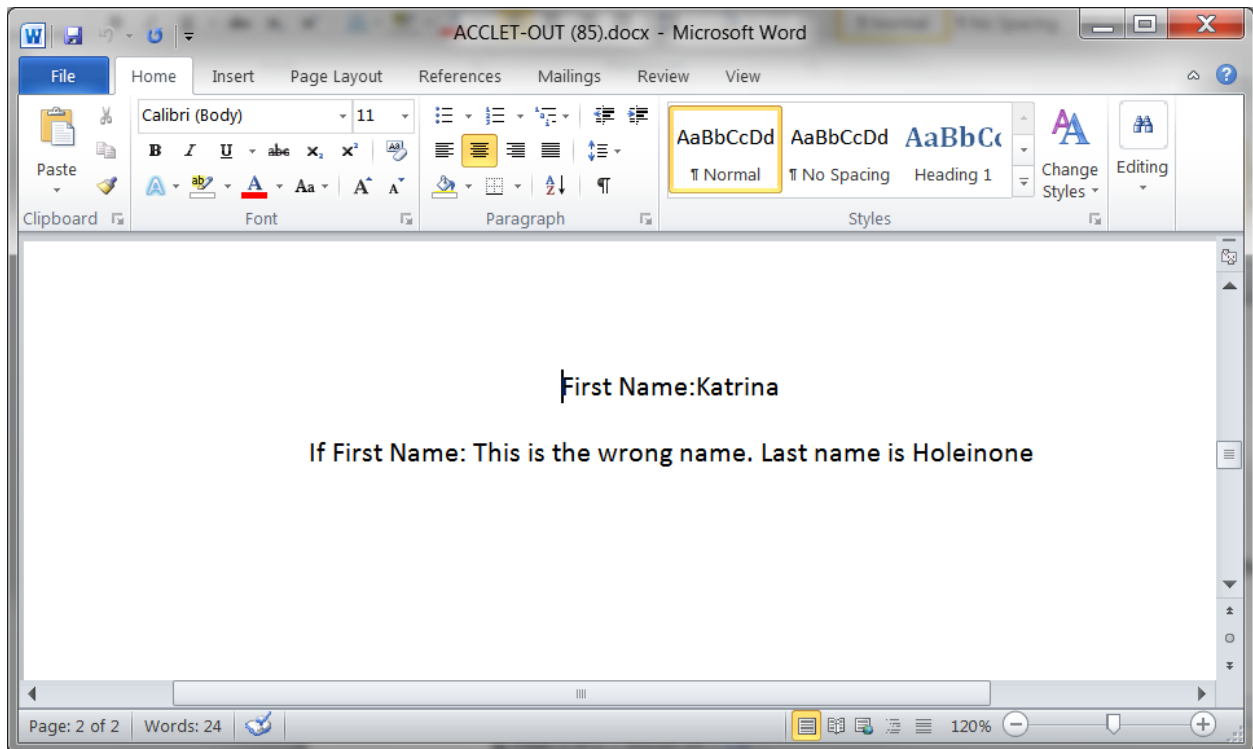
The Properties window on the right shows the query 'Query1.dtt' and the 'Identity' property.

Rerunning the same 2 people now gives the following:

Karen Holbrook:

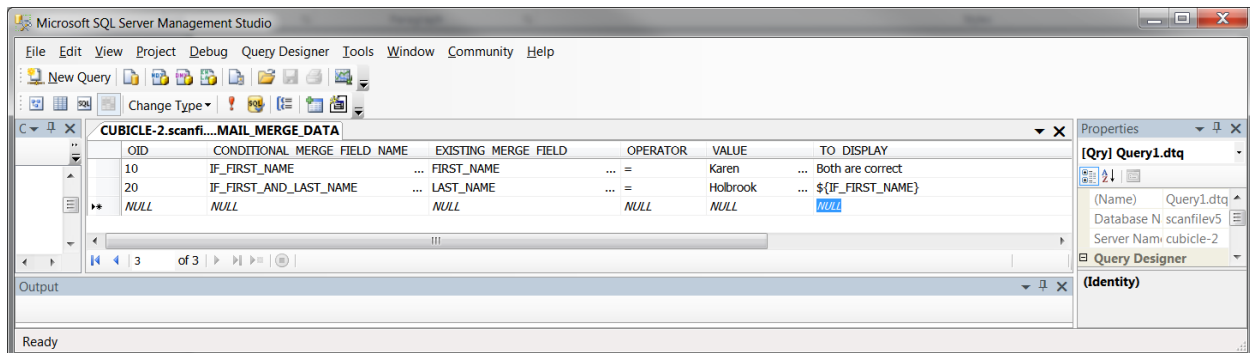


Katrina Holeinone:



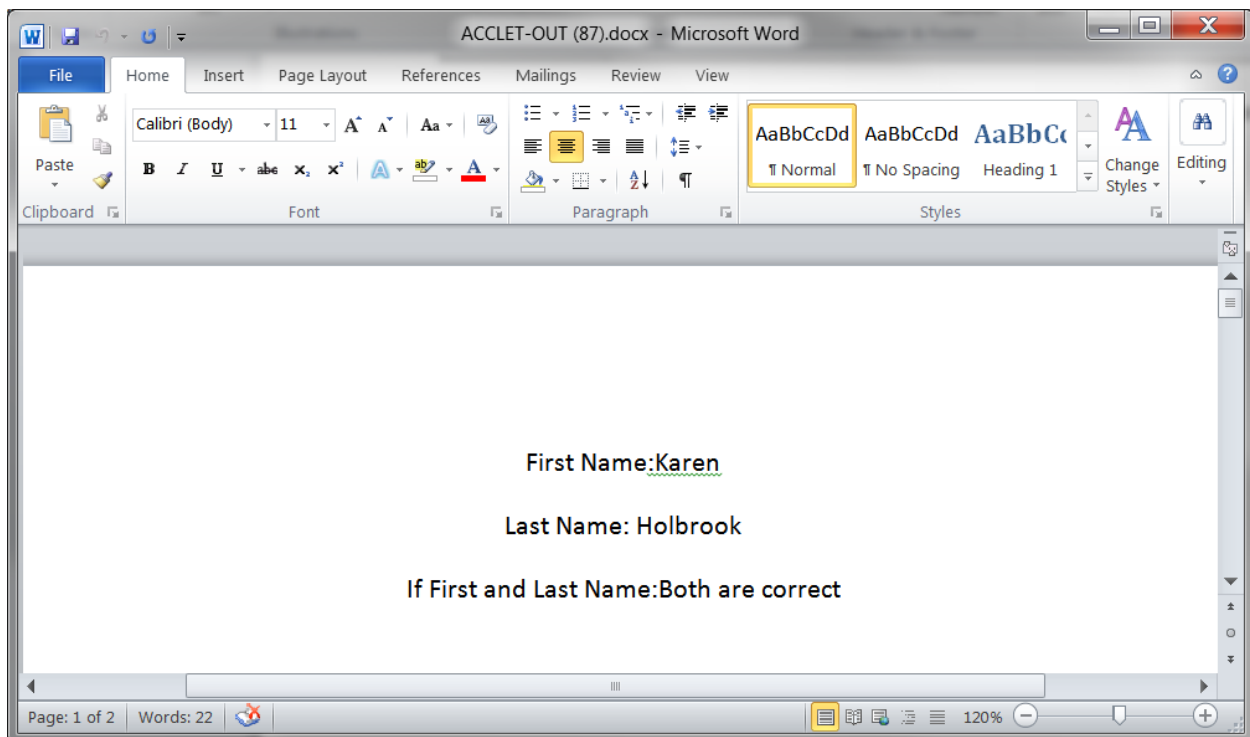
## Linking 2 Rows to Build an “And” Statement

The TO\_DISPLAY column can be used to place a CONDITIONAL\_MERGE\_FIELD you have already created. (Please make sure the oid of the field in the TO\_DISPLAY is smaller than the other oid. This will increase speed. Also, please ensure your logic will not create an infinite loop, or contradicts other rows). This is helpful to only show data if 2 conditions are met. Here is an example of how to print “Both are correct” only if first name is Karen AND last name is Holbrook.

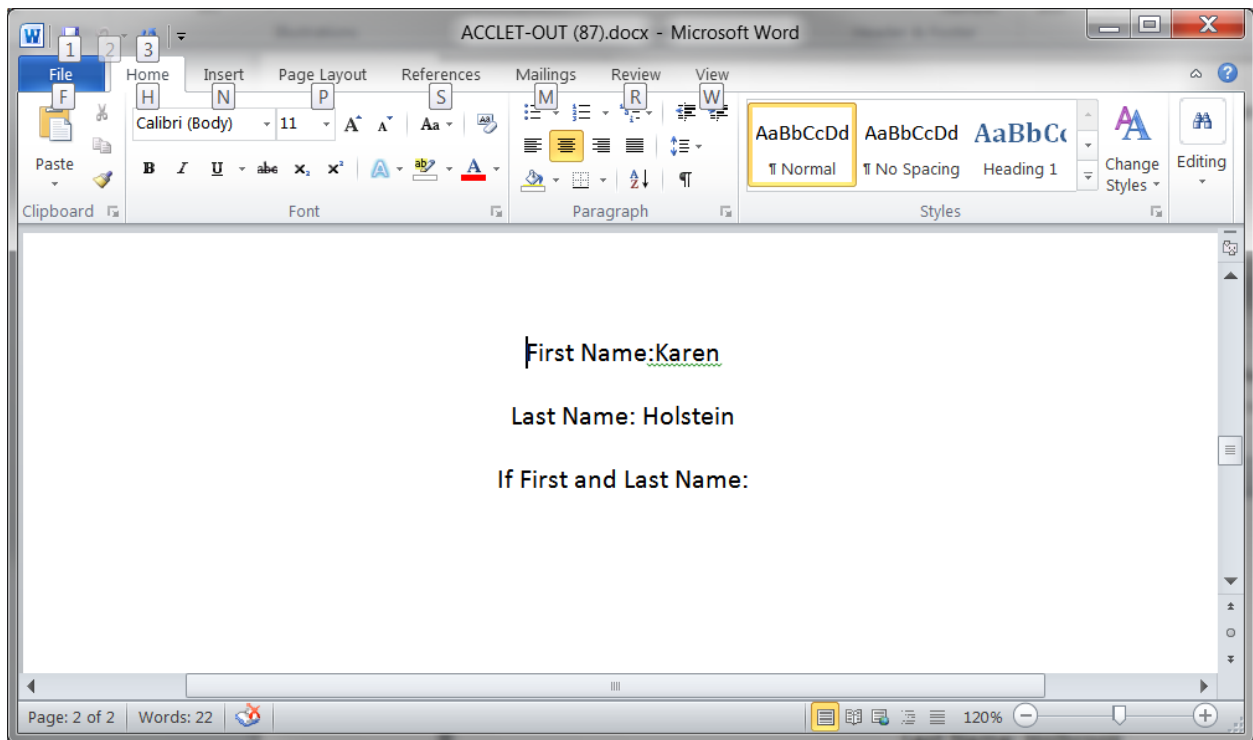


Now, when you add the IF\_FIRST\_AND\_LAST\_NAME Quick Part to your template, the result will show “Both are correct” only if both conditions are correct

Here is Karen Holbrook:



And here is Karen Holstein:

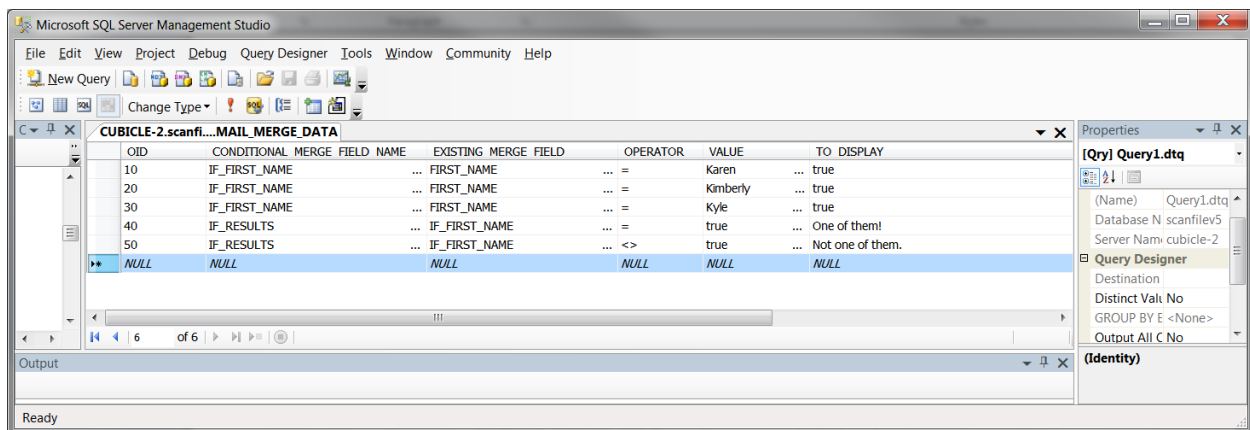


## More Advanced Criteria

You can also use the EXISTING\_MERGE\_FIELD to call a previously declared CONDITIONAL\_MERGE\_FIELD\_NAME. This can be used to create a more elaborate scenario. For example, to discover if something is a part of a list.

Here is one way to find out if the person is named Karen Kimberly or Kyle. If they are, it will print "One of them!" Otherwise, it will print "Not one of them."

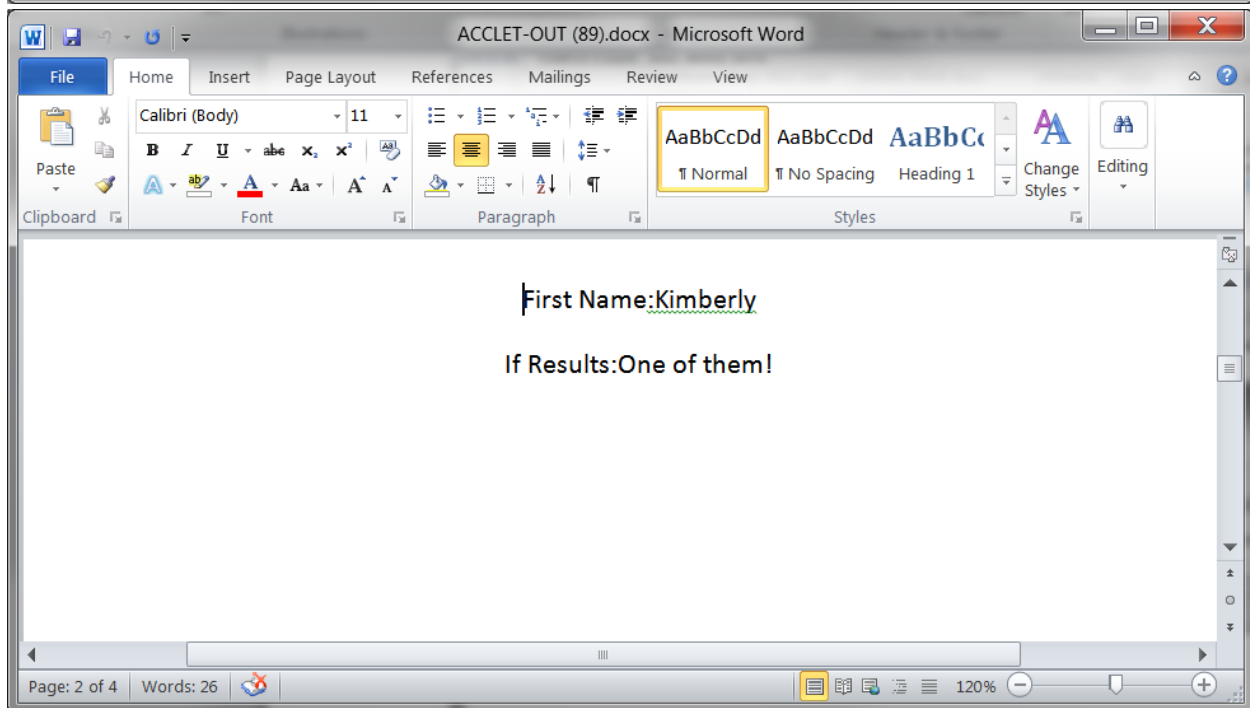
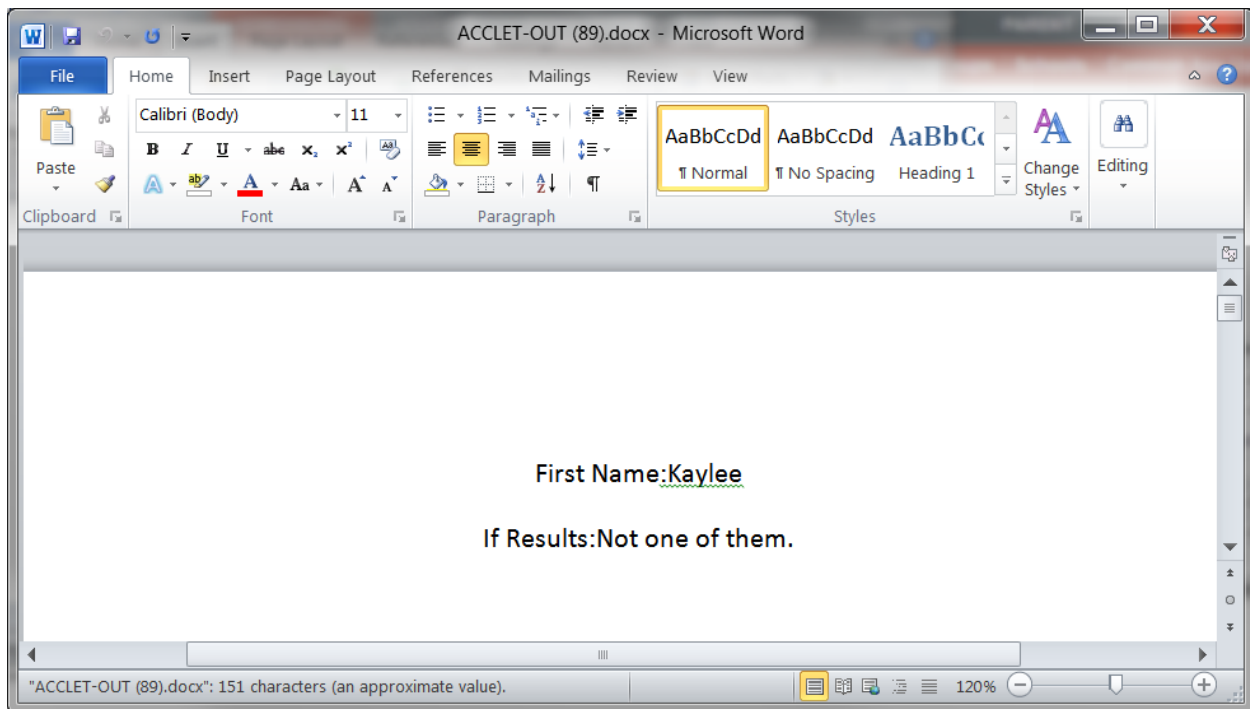
It works by first setting IF\_FIRST\_NAME to true only if the FIRST\_NAME is Karen, Kimberly or Kyle. IF\_RESULTS then checks to see if IF\_FIRST\_NAME is true. Adding IF\_RESULTS to the template will display the proper phrase at the proper time.



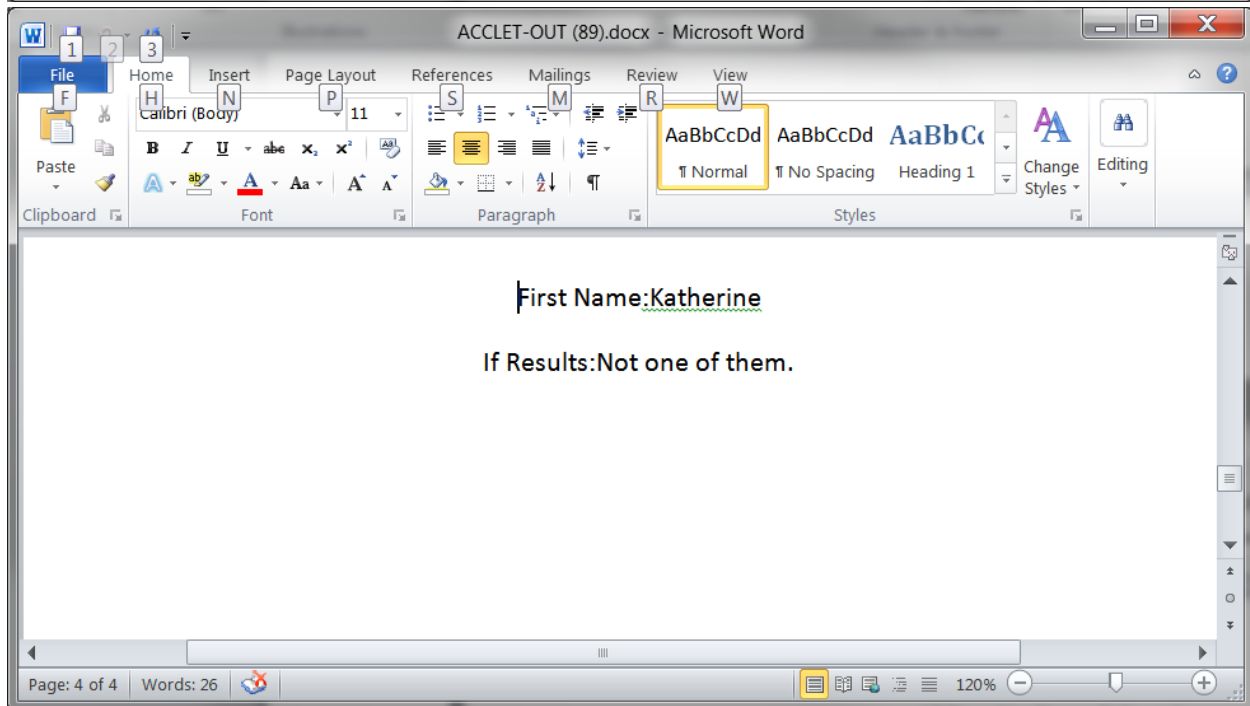
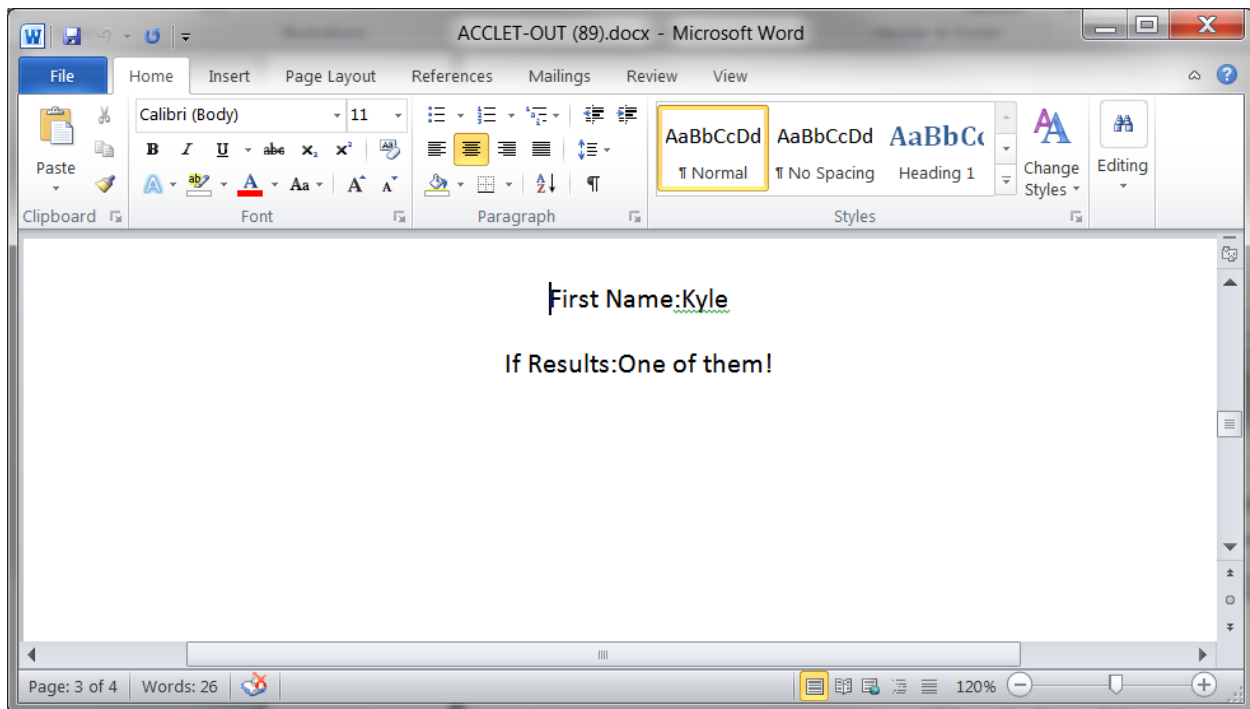
The screenshot shows the Microsoft SQL Server Management Studio interface. The main window displays a query result table titled "CUBICLE-2.scanfi...MAIL\_MERGE\_DATA". The table has the following columns: OID, CONDITIONAL\_MERGE\_FIELD\_NAME, EXISTING\_MERGE\_FIELD, OPERATOR, VALUE, and TO\_DISPLAY. The data rows are as follows:

OID	CONDITIONAL_MERGE_FIELD_NAME	EXISTING_MERGE_FIELD	OPERATOR	VALUE	TO_DISPLAY
10	IF_FIRST_NAME	...	=	Karen	...
20	IF_FIRST_NAME	...	=	Kimberly	...
30	IF_FIRST_NAME	...	=	Kyle	...
40	IF_RESULTS	...	=	true	...
50	IF_RESULTS	...	<>	true	...
60	IF_RESULTS	...	<>	true	...
70	IF_RESULTS	...	<>	true	...
80	IF_RESULTS	...	<>	true	...
90	IF_RESULTS	...	<>	true	...
100	IF_RESULTS	...	<>	true	...
110	IF_RESULTS	...	<>	true	...
120	IF_RESULTS	...	<>	true	...
130	IF_RESULTS	...	<>	true	...
140	IF_RESULTS	...	<>	true	...
150	IF_RESULTS	...	<>	true	...
160	IF_RESULTS	...	<>	true	...
170	IF_RESULTS	...	<>	true	...
180	IF_RESULTS	...	<>	true	...
190	IF_RESULTS	...	<>	true	...
200	IF_RESULTS	...	<>	true	...
210	IF_RESULTS	...	<>	true	...
220	IF_RESULTS	...	<>	true	...
230	IF_RESULTS	...	<>	true	...
240	IF_RESULTS	...	<>	true	...
250	IF_RESULTS	...	<>	true	...
260	IF_RESULTS	...	<>	true	...
270	IF_RESULTS	...	<>	true	...
280	IF_RESULTS	...	<>	true	...
290	IF_RESULTS	...	<>	true	...
300	IF_RESULTS	...	<>	true	...
310	IF_RESULTS	...	<>	true	...
320	IF_RESULTS	...	<>	true	...
330	IF_RESULTS	...	<>	true	...
340	IF_RESULTS	...	<>	true	...
350	IF_RESULTS	...	<>	true	...
360	IF_RESULTS	...	<>	true	...
370	IF_RESULTS	...	<>	true	...
380	IF_RESULTS	...	<>	true	...
390	IF_RESULTS	...	<>	true	...
400	IF_RESULTS	...	<>	true	...
410	IF_RESULTS	...	<>	true	...
420	IF_RESULTS	...	<>	true	...
430	IF_RESULTS	...	<>	true	...
440	IF_RESULTS	...	<>	true	...
450	IF_RESULTS	...	<>	true	...
460	IF_RESULTS	...	<>	true	...
470	IF_RESULTS	...	<>	true	...
480	IF_RESULTS	...	<>	true	...
490	IF_RESULTS	...	<>	true	...
500	IF_RESULTS	...	<>	true	...
510	IF_RESULTS	...	<>	true	...
520	IF_RESULTS	...	<>	true	...
530	IF_RESULTS	...	<>	true	...
540	IF_RESULTS	...	<>	true	...
550	IF_RESULTS	...	<>	true	...
560	IF_RESULTS	...	<>	true	...
570	IF_RESULTS	...	<>	true	...
580	IF_RESULTS	...	<>	true	...
590	IF_RESULTS	...	<>	true	...
600	IF_RESULTS	...	<>	true	...
610	IF_RESULTS	...	<>	true	...
620	IF_RESULTS	...	<>	true	...
630	IF_RESULTS	...	<>	true	...
640	IF_RESULTS	...	<>	true	...
650	IF_RESULTS	...	<>	true	...
660	IF_RESULTS	...	<>	true	...
670	IF_RESULTS	...	<>	true	...
680	IF_RESULTS	...	<>	true	...
690	IF_RESULTS	...	<>	true	...
700	IF_RESULTS	...	<>	true	...
710	IF_RESULTS	...	<>	true	...
720	IF_RESULTS	...	<>	true	...
730	IF_RESULTS	...	<>	true	...
740	IF_RESULTS	...	<>	true	...
750	IF_RESULTS	...	<>	true	...
760	IF_RESULTS	...	<>	true	...
770	IF_RESULTS	...	<>	true	...
780	IF_RESULTS	...	<>	true	...
790	IF_RESULTS	...	<>	true	...
800	IF_RESULTS	...	<>	true	...
810	IF_RESULTS	...	<>	true	...
820	IF_RESULTS	...	<>	true	...
830	IF_RESULTS	...	<>	true	...
840	IF_RESULTS	...	<>	true	...
850	IF_RESULTS	...	<>	true	...
860	IF_RESULTS	...	<>	true	...
870	IF_RESULTS	...	<>	true	...
880	IF_RESULTS	...	<>	true	...
890	IF_RESULTS	...	<>	true	...
900	IF_RESULTS	...	<>	true	...
910	IF_RESULTS	...	<>	true	...
920	IF_RESULTS	...	<>	true	...
930	IF_RESULTS	...	<>	true	...
940	IF_RESULTS	...	<>	true	...
950	IF_RESULTS	...	<>	true	...
960	IF_RESULTS	...	<>	true	...
970	IF_RESULTS	...	<>	true	...
980	IF_RESULTS	...	<>	true	...
990	IF_RESULTS	...	<>	true	...
1000	IF_RESULTS	...	<>	true	...

The right-hand pane shows the Properties window for the query, displaying the query name "Query1.dttq" and the database "scanfilev5". The bottom status bar indicates "Ready".







**General Information:**

Valid operators for a String:

=

<>

Valid operators for an Integer:

=

<>

>

>=

<

<=

To display the value of a mail merge (not static text) use this pattern: \${MERGE\_FIELD\_NAME}

You may put a conditional mail merge name you previously created in the above example, but please make sure that value has a lower oid. This is because it renders the values in order from lowest oid to highest, and it is very beneficial for the value to have already been rendered when it is called in a different row.

Admin servlet will refresh the mail merge data table in the webapp.

### Example of Advanced Range Conditional Merge Setup

Edit	Delete	Conditional Merge Field ▼	Existing Merge Field	Operator	Value	To Display
		IF_LEVEL_RESULT	IF_GIVING_LEVEL_6	=	true	Giving Level 6
		IF_LEVEL_RESULT	IF_GIVING_LEVEL_2	=	true	Giving Level Two
		IF_LEVEL_RESULT	IF_GIVING_LEVEL_4	=	true	Giving Level 4
		IF_LEVEL_RESULT	IF_GIVING_LEVEL_5	=	true	Giving Level 5
		IF_LEVEL_RESULT	IF_GIVING_LEVEL_3	=	true	Giving Level 3
		IF_LEVEL_RESULT	IF_GIVING_LEVEL_1	=	true	Giving Level One
		IF_GIVING_LEVEL_6	AMOUNT_PAID	>=	10000	true
		IF_GIVING_LEVEL_5	AMOUNT_PAID	>	4999	true
		IF_GIVING_LEVEL_4_UPPER	AMOUNT_PAID	<=	2499	\${IF_GIVING_LEVEL_4}
		IF_GIVING_LEVEL_4	AMOUNT_PAID	>	999	true
		IF_GIVING_LEVEL_3_UPPER	AMOUNT_PAID	<=	4999	\${IF_GIVING_LEVEL_3}
		IF_GIVING_LEVEL_3	AMOUNT_PAID	>	2499	true
		IF_GIVING_LEVEL_2_UPPER	AMOUNT_PAID	<=	999	\${IF_GIVING_LEVEL_2}
		IF_GIVING_LEVEL_2	AMOUNT_PAID	>	499	true
		IF_GIVING_LEVEL_1	AMOUNT_PAID	<=	499	true
		IF_GIVING_LEVEL_5_UPPER	AMOUNT_PAID	<=	9999	\${IF_GIVING_LEVEL_5}

The conditional merge field IF\_LEVEL\_RESULT is added to the Word document and will display the appropriate giving level text based on the logic tests.

Example:

If AMOUNT\_PAID <= 9999 (IF\_GIVING\_LEVEL\_5\_UPPER) then check IF\_GIVING\_LEVEL\_5  
 IF\_GIVING\_LEVEL\_5 > 4999 results in TRUE then  
 IF\_LEVEL\_RESULT checks IF\_GIVING\_LEVEL\_5 = true and displays  
 "Giving Level 5" in the letter.

This logic equates to if AMOUNT\_PAID between \$4,999.01 and \$9,999 then display 'Giving Level 5'