Banner to Word/Word Perfect: outline of the steps

- If you are starting from scratch with your project, **begin with Step 1**.

- If you already have a population selection and a Banner letter, **begin with Step 13**.

- If you are running pending letters (you are using a Banner communication plan or you have manually added the required letter codes to the appropriate student records), or you are using a manual population selection (you manually added people's names on the Population Extract Data Form (GLAEXTR), **begin with Step 15**.

Use the table as a guideline to the steps you will perform to create a letter that will be downloaded and finished in a third-party word processing application.

Note: The other job aids included in this CBT will also help you keep track of your project.

Step	What You'll Do	How You'll Do It
PLAN YOUR PROJECT		
1	Define your WHO, WHY, HOW, WHEN, WHAT	Your own planning
2	Create (or edit, or copy) your population selection to find your "WHO"	GLRSLCT
3	Plan the letter or document you will use in your Word/Word Perfect merge. This is the form document. It will contain text, formatting, merge fields (which you'll bring over from Banner). This will help you define the "WHAT" that you will need to extract from Banner.	Word/Word Perfect
4	Decide what data from Banner you will need.	Your own planning
5	Determine what Banner variables are available. The Banner variables will eventually become the merge fields available in Word or WordPerfect.	• Access GLRVRBL • Select the appropriate application • Find already created variables

Banner to Word/Word Perfect: outline of the steps, continued

Step	What You'll Do	How You'll Do It
	BUILD YOUR BANNER LETTER	
7	• Check to see what letters you have already created. • Name the Banner 'letter' which will contain the paragraphs (limit = 15 characters). • Use a standard naming convention, for example, you might use your office "code" as the first character(s) in the letter. • Decide whether the letter can be sent more than once a term. If YES, select the **Allow Duplicates** checkbox.	GTVLETR
8	• Check to see if there are existing paragraphs that contain the variables you want. Be sure these are the paragraphs for your office. • You don't need to create new paragraphs if paragraphs exist that meet your needs. Note: Adding or removing a variable from a paragraph removes it from all Banner letters in which that paragraph is used.	GUAPARA
9	• If there are no paragraphs with the variables you need, create new banner paragraphs (limit = 7 characters). • Use a standard naming convention, for example, you might use your office "code" as the first character(s) in the paragraph name.	GTVPARA
10	• Insert the variables you want into the new Banner paragraphs you create. The order does not make any difference. • The Banner variables will eventually become the merge fields you will see in Word or WordPerfect.	GUAPARA

Banner to Word/Word Perfect: outline of the steps, continued

Step	What You'll Do	How You'll Do It
	BUILD YOUR BANNER LETTER, continued	
11	Insert the Banner paragraphs into the Banner letter. Note: Remember, for downloaded letters, the order does not make any difference.	GUALETR
12	• Review the final Banner letter. • You can view all the variables you have included in all the paragraphs in the letter by retrieving the letter, then Choosing Letter Detail from the **Options** menu.	GUALETR
	RUN LETTER GENERATION	
13	Write down the names of the population selection, population selection creator, letter, and application.	GLRSLCT, GUALETR
14	If you are using a population selection to find the PIDMS, then run the population selection to select the PIDMs (the "WHO"). Note: If you are running a manual population selection or a pending letter, then you do not need to run GLBDATA. You will start with GLBLSEL.	PROCESS/JOB = GLBDATA
15	Extract the WHAT from the variables in the banner letter for the population selection or for the people with the pending letters.	PROCESS/JOB = GLBLSEL
16	Create a file containing the data.	PROCESS/JOB = GLRLETR
17	Transfer/save the Banner data file as a .txt or .html file to a location where you can find it to use in Word/Word Perfect.	Whatever procedure your institution uses
18	• Merge the transferred file (the data document) with the letter or document you created in Word/Word Perfect (the form document). • The Banner variables you put into your Banner letter have become the Word/WordPerfect merge fields for your merge!	Word/Word Perfect