



RSA Archer Weekly Free Friday Webcast: Mail Merge

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April 12, 2013



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Agenda

- Mail Merge Overview
 - What is Mail Merge
 - What is New in 5.3 SP1
 - Additional Rules about Mail Merge
 - Alias Syntax
 - Merge Regions Syntax
- Demo of Mail Merge
 - Create Mail Merge Template
 - Create Fields
 - Upload Template
 - Export Template
- Questions

What Is Mail Merge?

- Mail Merge templates define how to insert records from the Platform into a Microsoft Word document by using the Microsoft Office Mail Merge functionality.
- You can create custom reports in the form of Word documents containing Mail Merge fields that display data from your application. This is particularly useful for customers who conduct iterative vendor assessments and SOX compliance reviews.

What Is Mail Merge? (cont)

- You can use the following field types for mail merge
 - Attachment
 - Cross-Reference
 - Date
 - External Link
 - IP Address
 - First Published
 - Last Updated
 - Numeric
 - Record Permission
 - Related Records
 - Sub-Form
 - Text
 - Tracking ID
 - User Group List
 - Values List
 - Voting

What is new in 5.3 SP1 for Mail Merge

- Export data contained in applications up to 6 applications away from the starting application
 - The application that the export is taking place on is the first application
- Ability to Nest Regions
- Export attachments inline (embedded) with the mail merge export
 - Office Word documents only
- Choose between foreground and background processing
 - User initiating the export must have their email somewhere on the record (RP Field or UG List)
- Easily troubleshoot issues with the new enhanced logging
 - The most common mistake is that the user tries to export an attachment other than Microsoft Word

Additional Rules about Mail Merge

- Mail merge regions should be well formed (always use pairs of matching TableStart and TableEnd commands with the same table name).
- If used inside a table, the TableStart and TableEnd commands must be inside the same row in the table.
- The following only affect versions before 5.3 SP1
 - A merge region may not contain fields from more than one cross-reference, internal reference, related records, or sub-form field.
 - Mail merge regions cannot be nested inside each other.
 - Fields in sub-forms in cross-referenced applications cannot be referenced, as they are considered to be, for the purposes of this functionality, another cross-reference.
 - To reference a field in an adjacent level, use the Cross Reference field serving as the Level Reference. Templates are associated to a level and can only reference fields from that level and an adjacent level.

Alias Syntax

- An **alias** is a short name for a unique object in the system that is human readable, but also can be used in code or as a reference in configuration processes. All **alias** names must contain only alphanumeric characters, beginning with a letter and containing no spaces. The maximum length is 40 characters.
- To reference a field that is in the primary level, insert the alias of the afield into the report template.
- Use this query to get a list of all Aliases in a particular Application
 - ```
SELECT ivfd.field_name as Field_Name,
 ivfd.field_id AS Field_ID,
 ivfd.Alias AS Alias
FROM tblivfielddef ivfd
JOIN tbllevel l on ivfd.level_id = l.level_id
JOIN tblModule m on l.module_id = m.module_id
WHERE m.module_id = ??
```

# Alias Syntax (Cont.)

- Examples of the field types that will use primary level alias syntax
  - **Date:** «Drp\_Dwn\_DateTime», «Drp\_Dwn\_Date\_Only», «Txt\_Box\_DateTime» or «Txt\_Box\_Date\_Only»
  - **External Link:** «List\_External Link»
  - **IP Address:** «IPAddress» or «List:IPField»
  - **First Published:** «First\_Published»
  - **Last Updated:** «Last\_Updated»
  - **Numeric:** «Numeric»
  - **Text:** «Text»
  - **Tracking ID:** «TrackingID»
  - **Values List:** «List: Values\_List\_Drp\_Down», «Radio Button», or «List: Values\_Checkbox»
  - **Voting:** «Voting»



# Merge Regions Syntax

- Certain field types must be specified using a merge region, which enables the field to dynamically grow portions of the document. To specify a merge region, insert `TableStart` at the beginning of the region and `TableEnd` at the end of the region. Manual Record Permission field allows for manual selection of users and/or groups who are permitted to access that record.
- Merge Regions Syntax Examples
  - Cross-Reference, Related Record, and Sub-Form fields:  
«TableStart:FieldAlias»«RelatedFieldAlias» «TableEnd:FieldAlias»
  - Values List fields:  
«TableStart:FieldAlias»«ValuesList»«TableEnd:FieldAlias»
  - External Links fields (with either a Name or URL):  
«TableStart:FieldAlias»«Name»«URL»«TableEnd:FieldAlias»

DEMO TIME!!!



# Questions?

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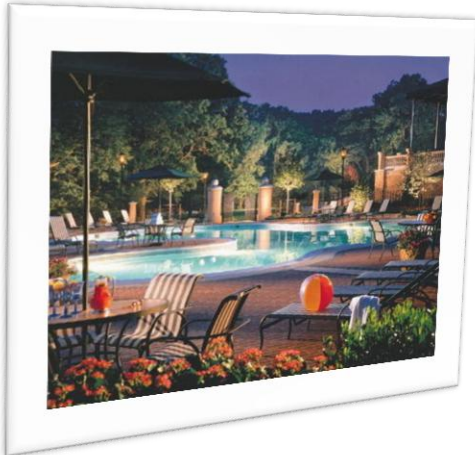
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# Contacting Support

- Email:

[archersupport@rsa.com](mailto:archersupport@rsa.com)

- Phone:

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THANK YOU

