

# Things to do before your first approvals

---

## Set-up Template Letters

***You will need to set-up your mail merge letters once –***

You will need to create a mail merge letter for each of the letter types that you use.

There are different results letters: the one you need for each student will depend on that student's results. The letters are:

Result/description	Letter/data file name
Approval of MPhil and MRes (including those with Distinction)	MPhil and MRes approval letter – b01 / MPhil and MRes approval data b01
Approval of MPhil and MRes, thesis only	MPhil and MRes approval letter – b01+rep / MPhil and MRes approval data b01+rep
Approval of 2 <sup>nd</sup> MPhil (BGS will let you know if you have any)	2 <sup>nd</sup> MPhil approval letter – b01mphl2 (includes Certificate) / 2nd MPhil approval data
Conditional approval <small>(These letters must be produced manually, see separate Conditional Approval Instructions document)</small>	Conditional approval letter/ Conditional approval data
Non-approval of MPhil, MRes and MST	Non approval – b19 / non-approval data
Approval of MSt	MSt approval letter – b01mst / MSt approval data

Go to the website – the template letters and place markers for the data files will be saved there. Copy the letters you will use (and their matching data files) onto your computer/network. Make sure that they are saved securely.

(While you are there, also download the Results for BGS file and save it with the letters and data file place-holder.)

## Customise the letter

Open the letter

Customise the draft letter to suit your own house requirements and style.

You can alter the recipients of the copies but you must send copies to the College and the Development Office.

Save

## Content of the letter

**Unless instructed to do so by BGS, Degree Committees must not change the wording of these letters.**

Periodically the non-approval letter will be updated, to reflect changes in the Statutes and Ordinances: BGS will send new wording to be inserted into your templates.

# Create Process to Populate Approval Table

*You will need to add a process once, next time it will be there ready for you –*

Navigate to:

Main menu > Records and Enrolment>Career and Programme Informatn>Graduate Record Processing>**Faculty Students**

Select the **Add a New Value** tab

Please note you will only need to add a new value the first time you run this process

## Faculty Students

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

Limit the number of results to (up to 300): 300

Run Control ID: begins with

Academic Institution: begins with UCAMB

Academic Career: begins with

☐ Case Sensitive

Search

Clear

Basic Search

Save Search Criteria

Find an Existing Value | [Add a New Value](#)

Create a new run control ID, eg: DC\_Approvals (but, if you have access for more than one DC, please include the DC initials so that you can tell them apart when you use them)

Type GRAD in the Academic Career box

Then click **Add**

## Faculty Students

Find an Existing Value **Add a New Value**

Run Control ID: DC\_APPROVALS

Academic Institution: UCAMB

Academic Career: GRAD

Add

[Find an Existing Value](#) | [Add a New Value](#)

Look up your Academic Organisation


Click **Save**

Faculty Students

Run Control ID: Test\_DC [Report Manager](#) [Process Monitor](#) [Run](#)

Academic Institution: UCAMB University of Cambridge

Academic Career: GRAD Graduate

\*Academic Organisation:  

Expected Graduation Term:

Approval Date:

[Save](#) [Notify](#) [Add](#) [Update/Display](#)

The process is now ready for you whenever you need it.

# Add New Letter Value

*You will need to add a process once for each type of letter you send, next time it will be there ready for you –*

Navigate to:

Main menu > Community > Communications > **Letter Generation**

Select “Add a New Value”

Letter Generation

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

Limit the number of results displayed to 1000

Run Control ID: begins with

☐ Case Sensitive

Search

Clear

Basic Search

Save Search Criteria

[Find an Existing Value](#) | [Add a New Value](#)

Enter a name for your run control, for example, APPROVAL\_LETTERS

Click **Add**

Letter Generation

Find an Existing Value

Add a New Value

Run Control ID:

Add

[Find an Existing Value](#) | [Add a New Value](#)

Click the **Letter Code** lookup

From the popup window, select the letter you wish to use, then... (go to next instruction)

General Parameters | DataMerge Parameters | Checklist Parameters

Run Control ID: APPROVAL\_LETTERS    Report Manager    Process Monitor    Run

Selection

☒ All IDs    ☐ One Person ID    ☐ All Person IDs    ☐ One Org ID    ☐ All Org IDs

Person ID:

Organisation ID:

Letter Code Selection

Letter Code:  

Name and Address Usage

Address:

Addr Name:

Salutation:

Joint Salutation Usage

Joint Name:

ID Extract Name Usage

ID Extract Name Usage:

Save

Ready

General Parameters | DataMerge Parameters | Checklist Parameters

Look Up

Look Up Letter Code

Cancel

Search Results

View 100    First    1-2 of 2    Last

EL1	EL Approval letter
EL2	EL Non-approval letter

complete the rest of the fields as shown here.

Address: Mailing then home  
Addr Name: Primary Full  
Salutation: Primary Full

ID Selection

☒ All IDs ☐ One Person ID ☐ All Person IDs ☐ One Org ID ☐ All Org IDs

Person ID:

Organisation ID:

Letter Code Selection

Letter Code:

Missing Critical Data

☒ Produce Communication

☒ Complete Communication

Name and Address Usage

Address:

Addr Name:

Salutation:

Joint Salutation Usage

Joint Name:

Click the Date/Merge Parameters tab at the top and then complete the From Date and To Date as shown here.

From Date: 01/10/2010  
To Date: 31/12/2009

Click **Save**

General Parameters **Date/Merge Parameters** Checklist Parameters

Run Control ID: APPROVAL\_LETTERS [Report Manager](#) [Process Monitor](#)

Extract File Path/Options

\*File Type:

Update Communication Letter Printed Date With

☐ Communication Date ☒ System Date ☐ User Supplied Date

Update Communication Completed Date With

☐ Communication Date ☒ System Date ☐ User Supplied Date

Communication Date Range Selection

\*From Date:  \*To Date:

Word Merge parameters

Template Path:

Sort Option:  ☐ Send to Printer

**(Do not forget to add another letter value for the non-approvals.)**