



# RSA Archer Weekly Free Friday Webcast: Mail Merge Advanced Attachments, Images, Sub-Forms, Tables

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Contact Information

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# Mail Merge Overview

- Archer 5.3 SP1 and later
- Ability to export up to 6 applications (hops) away from the starting application.
- Ability to Nest Regions
- Choose between foreground and background processing

# Attachments

- Attachments must be a Word (.doc or .docx) document. All other file types are not supported and are ignored in the exported file
- Each attachment starts on a new page with a Section Break (Next Page) added before/after
- Header or footer information in an attachment is replaced with the header and footer from the Mail Merge template
- Global formatting settings in an attachment are replaced by the global settings from the Mail Merge template. This conversion may result in unexpected formatting changes appearing in the exported document.
- Use the List option to avoid Data errors

# Attachments (continued)

- Additional Options
  - Id
  - Name
  - System Date
  - Length in bytes
  - Downloads
  - Data (attachment content)
- Examples

```
{ MERGEFIELD List:Attachments.Id \* MERGEFORMAT }  
{ MERGEFIELD List:Attachments.Name \* MERGEFORMAT }  
{ MERGEFIELD List:Attachments.SystemDate \* MERGEFORMAT }  
{ MERGEFIELD List:Attachments.Length \* MERGEFORMAT }  
{ MERGEFIELD List:Attachments.Downloads \* MERGEFORMAT }  
{ MERGEFIELD List:Attachments.Data \* MERGEFORMAT }
```

# Images

- Additional Options
  - Id
  - Name
  - Data (attachment content)
  - Length (size in bytes)
- Examples

```
{ MERGEFIELD List:Screenshot.Id \* MERGEFORMAT }  
{ MERGEFIELD List:Screenshot.Name \* MERGEFORMAT }  
{ MERGEFIELD List:Screenshot.Data \!format image \* MERGEFORMAT }  
{ MERGEFIELD List:Screenshot.Length \* MERGEFORMAT }
```

# Sub-Forms

- Work the same way as Cross-Reference and Related Records fields
- Requires the use of Merge Regions with fields in-between
  - TableStart:SubFormAlias
  - FieldAlias
  - TableEnd:SubFormAlias
- Example

```
{ MERGEFIELD TableStart:My_Archer_Servers \* MERGEFORMAT }  
{ MERGEFIELD Note \!format html:Note \* MERGEFORMAT }  
{ MERGEFIELD Last_Updated.Date \@ "MM/dd/yyyy" \* MERGEFORMAT }  
{ MERGEFIELD IP_Address \* MERGEFORMAT }  
{ MERGEFIELD List:Instance_URL.Url \!format link:Instance_URL.Url \* MERGEFORMAT }  
{ MERGEFIELD TableEnd:My_Archer_Servers \* MERGEFORMAT }
```

# Tables

- Requires the use of Merge Regions
  - TableStart:FieldAlias
  - TableEnd:FieldAlias
- Merge Regions should be inside the same row
- Recommend using fixed column widths
- Example with Sub-Form

Notes	Instance URL	IP Address
<pre>{ MERGEFIELD TableStart:My_Archer_Servers \* MERGEFORMAT } { MERGEFIELD Note \!format html:Note \* MERGEFORMAT }</pre>	<pre>{ MERGEFIELD List:Instance_URL.Name \!format link:Instance_URL.Url \* MERGEFORMAT }</pre>	<pre>{ MERGEFIELD IP_Address \* MERGEFORMAT } { MERGEFIELD TableEnd:My_Archer _Servers \* MERGEFORMAT }</pre>

# Alias Names

- 5.3 and earlier SQL query

```
SELECT ivfd.field_name,  
ivfd.field_id AS Field_ID,  
ivfd.Alias AS Field_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 = ###
```

- 5.4 and later SQL query (English)

```
SELECT ft.field_name, fd.field_id, fd.alias  
FROM tblIVFieldDef fd  
JOIN tblFieldTranslation ft ON ft.field_id = fd.field_id  
JOIN tblLevel lv ON fd.level_id = lv.level_id  
JOIN tblModule m ON m.module_id = lv.module_id  
WHERE ft.language_id = 1  
AND m.module_id = ###
```

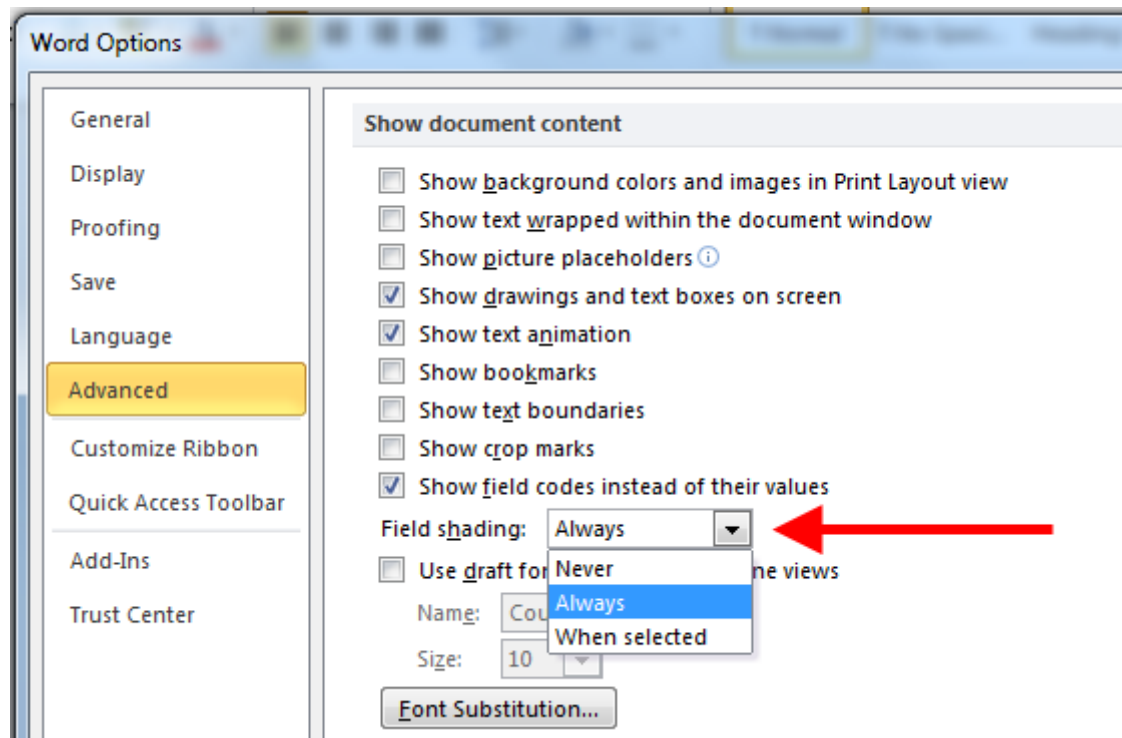


# Microsoft Word Tips

- Keyboard Shortcuts
  - Toggle all Field Codes: ALT+F9
  - Toggle selected Field Codes: SHIFT+F9
  - Insert Field Code manually: CTRL+F9
  - Show Paragraph Markers ¶: CTRL+\*
- Formatting Word Fields with Switches
  - [http://www.gmajor.com/formatting\\_word\\_fields.htm](http://www.gmajor.com/formatting_word_fields.htm)

# Microsoft Word Tips (continued)

- To see Field Codes easier, set Field Shading to Always



# Mail Merge Template Creator application

- Quickly creates a Word document and inserts the MERGEFIELD codes in the required format
- Limited to 6 hops
- Requires Read access to Instance database for Module and Field information
- Requires Word to create the document
- Contact Archer Support for the latest version

# Demo and Questions



# RSA Archer Course Offerings



## System Administrator

### *elearning*

- Introduction to GRC
- Getting Started with the RSA Archer Platform
- Navigating the RSA Archer Platform

### *Instructor-Led*

- RSA Archer Administration
- RSA Archer Advanced Administration



## Business Owner

### *elearning*

- Introduction to GRC
- Getting Started with the RSA Archer Platform
- Navigating the RSA Archer Platform
- Archer Solution Fundamentals

### *Instructor-Led*

- RSA Archer Administration
- Getting Started with Enterprise Risk Management
- Getting Started with Policy & Compliance Management



## End User

### *elearning*

- Introduction to GRC
- Getting Started with the RSA Archer Platform
- Navigating the RSA Archer Platform

Customized RSA Archer End User training is available upon request

[www.emc.com/rsa-training](http://www.emc.com/rsa-training)



# Welcome to the RSA Archer Community



- **RSA Archer Community Newsletter**
  - The monthly RSA Archer Community Newsletter is packed with everything you want to know for RSA products, services, events and GRC industry trends. Never miss an issue and receive the Community Newsletter each month, delivered to your Inbox!
- **RSA SecurCare Online**
  - SecurCare Online, a state-of-the-art e-support system, is now available to RSA Archer customers. With SecurCare Online you'll be able to plan an installation, upgrade or migration, diagnose and repair problems, find answers to support questions, download current platform patches and bug fixes, manage your support cases, and more – 24 hours a day.
- **RSA Archer Live Webcasts, for the public**
  - Live product webcasts are held on Thursdays at 2:00 ET. Also, these webcasts are recorded and placed on the Archer Community.

# Contacting Support

- Email:

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

- Phone:

USA: 1-800-995-5095 (option 5 for Archer)

Global numbers:

<http://www.emc.com/support/rsa/contact/phone-numbers.htm>

THANK YOU