



Online Administration

Creating SQL Mail Merge

The primary function of the **SQL Mail Merge** facility is to create a file of exported data on the basis of an SQL `Select` query. The data may also be used for analysis in Microsoft Excel. Only statements that begin with the word `Select` are allowed, all other commands such as `Update`, `Insert` or `Delete` are prohibited and will fail validation. Statements separated by a semi-colon will also fail validation. After the file has been created, you can export the data to a network location, or to a local machine. The System Administrator must nominate which users and user groups may initiate the query.

Searching for an SQL Mail Merge Query

Log in to One v4 Online and click the **Administration** button to display the **System Admin** tab, **SQL Mail Merge** is the default page. From here you can search for existing queries or add a new query.

Use the **Query Name** or the **Select Context** fields to search for existing queries.

Click the **More Options** button to search for active or inactive mail merge queries only.

Click the **Add New Query** button to display the **Context** fields.

Click the **Search** button to initiate a search, with or without data in the search fields.

Click the **View** button to toggle between Wide View and Normal View (hide the **Search** panel).

This field displays if the query is active or not.

Click the **Hide** button to hide the **Save** and **Cancel** buttons.

Adding a New SQL Mail Merge Query

1. Enter the **Query Name**, this is a mandatory field.
2. Select the **Context** from the drop-down list, this is a mandatory field.
3. Select the **Active** check box to activate the query.
4. Click the **Save** button to save the **SQL Mail Merge** definition.

Adding an SQL Statement

SQL should only be carried out by a System Administrator who is fully aware of its implications. Capita cannot accept responsibility for data problems caused as a result of following this advice incorrectly.

1. Enter the select query in the **SQL Statement** box (only `Select` statements are allowed).
To help you with the query, a list of parameters displays in the **Parameters** panel. The list is populated when the **Context** is selected.
2. If required, enter a **Parameter value**.
3. Click the **Save** button.

Click the **Export** button to display the **Save As** dialog. Choose a location to save your file. Click the **Save** button.

Click the **Preview** button to display the **Query Results** on the **SQL Mail Merge Preview** dialog.



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Adding Users

1. Select the **Users** tab to display the **Users** list.
2. Click the **Edit** button to display the **Users** browse.
3. To filter the list, enter a **User Name**.
4. Select the check boxes for the users who can initiate the SQL query. If you wish to remove a user from a query at a later date, deselect the check box.
5. Click the **Save** button.
6. Click the **Close** button to return to the **Users** list.

Adding User Groups

1. Select the **User Groups** tab to display the **User Groups** list.
2. Click the **Edit** button to display the **Groups** browse.
3. To filter the list, enter a **Group Name**.
4. Select the check boxes for the groups who can initiate the SQL Query. If you wish to remove a group from a query at a later date, deselect the check box.
5. Click the **Save** button.
6. Click the **Close** button to return to the **User Groups** list.

SQL Mail Merge Button

The **SQL Mail Merge** button displays in many areas of One v4 Client and One v4 Online. Click the button to display the **List of SQL Mail Merges** dialog.

A **Preview** button is available to enable you to view the query results.

The **Export** button enables you to save the files and export the queries.

Related Reference Guide:

- RG_Online_Common_SQL Mail Merge
- RG_Online_Common_SQL Mail Merge Button