Form Letters

Letters can be created inside Cognos® by using a *Repeater Table*. Create a free form page by adding *Blocks*, *Text*, *Tables*, and *Data Items*. Filters are added to only produce letters to the desired recipients.

Note: The following instructions are for Intermediate and Advanced Cognos® Users, assuming you are familiar with the report building process and concepts such as Advanced Filters, Query Calculations, and working with various Advanced Functions. For training options regarding these steps please contact Elizabeth Law at CognosEducation@jackhenry.com.

CD Rate Special Letter

Create a free form letter for the CDs maturing next month with balances greater than or equal to $50,000.

Skills: Creating a Repeater table, adding and combining images, tables, text and data items to create a form letter, and change repeater settings to only show one letter per page.

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Emil Storm
907 Jeanbart Avenue
Woodward PA 16882

Dear Emil Storm,

You are a valued customer of Jack Henry, and we would like to offer you a special rate for rolling your CD account ending in 066, maturing on Apr 20, 2017. Please review our rate specials and contact us by Apr 27, 2017 to receive this special offer.

Minimum to Earn APY	Interest Rate	Annual Percentage Yield (APY)
$50,000 - $75,000	.60%	.65%
$75,001-$100,000	.75%	.75%
Over $100,000	.80%	.80%

Sincerely,
Jack Henry

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Setup: Complete the following steps to create the report.

1. Click ⊕ **New**.
2. Select **Report**.
3. Select the **Blank** *Template*.
   Note: For a blank letter, with a white background do not select a Theme.
4. Click **OK**.
5. Connect to the **Silverlake** package.
6. Click ✎ **Toolbox**.
7. Expand *DATA CONTAINER*.
8. Drag the **Repeater table** onto the page.
   Object and query name box appears.
9. Click **OK**.
10. Click ▤ **Show properties**.
11. Change the following settings to only display one letter per page:

    - *Across:* **1**
    - *Down:* **1**

12. Click ▽ᵛ **Filter**, and select **Edit Filters**.
13. Add all filter conditions surrounding the letter criteria:

    - CDs Greater Than or Equal to 50,000
      [Cert Deposits].[CD Master].[Current Balance (CDMA)] >= 50000
    - CDs Maturing Next Month
      *[Cert Deposits].[CD Master].[Maturity Date (CDMA)] between _first_of_month
      (_add_months (current_date, 1)) and _last_of_month (_add_months (current_date, 1))*
    - Primary Relationships Only (Source Filter)

14. From the *Toolbox*, expand *LAYOUT*.
15. Drag an **Image** into the *Repeater table*.
16. Double-click 🖼 **Image**.
17. Click **Browse**.
    *Note: If you receive a Web server error pop-up contact your Cognos Administrator to setup
    access to images.*
18. Select desired logo.
19. Click **OK**.
20. Drag a **Table** into the *Repeater Table,* after the *Image*.

    - *Number of columns:* **1**
    - *Number of rows:* **4**

21. Set **Margin** (located in *Show properties*):

    - *Top margin:* **.5 in**

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22. Add **Data items** to the *Table*:

- *Row 1:* **Customer Name 1 (CFMA)**
- *Row 2:* **Address 1 (CFMA)**
- *Row 3:* **Address 2 (CFMA)**
- *Row 4:* **City, State Zip (CFMA)**

23. Modify **Address 2 (CFMA)** to display the **City, State Zip (CFMA)** in row 3 when no Address 2 exists:

- *if ([CIF].[CIF Master].[Address 2 (CFMA)] = ' ') then ([CIF].[CIF Master].[City, State Zip (CFMA)]) else ([CIF].[CIF Master].[Address 2 (CFMA)])*

24. Modify **City, State Zip (CFMA)** to appear blank if the information is displayed in row 3:

- *if ([CIF].[CIF Master].[Address 2 (CFMA)] <> ' ') then ([CIF].[CIF Master].[City, State Zip (CFMA)]) else null*

25. Modify **Font**:

- *Size:* **12 pt**

26. Add a **Block** after the *Table*, located in the *Toolbox*.
    Note: Make sure the Block is inserted inside of the Repeater Table.
27. Set **Padding** (Located in Show properties):

- *Top padding:* **1 in**

28. Add a **Text item** inside the *Block* (Located in the *Toolbox*).
    A *Text box* appears.
29. Type *Dear*. (Add a space after text.)
30. Click **OK**.
31. Add **Customer Name 1 (CFMA)** after *Text*.
32. Add another **Text item** after *Customer Name 1 (CFMA)*.
33. Type a comma in the text box.
34. Click **OK**.
35. Modify **Customer Name 1 (CFMA)** to remove spacing after the name:

- *trim ([CIF].[CIF Master].[Customer Name 1 (CFMA)])*

36. Add another **Block** at the bottom of the *Repeater Table*.
37. Insert a **Text item** inside the *Block*.
38. Type desired letter body text.

- *You are a valued customer of Jack Henry, and we would like to offer you a special rate for rolling over your CD account ending in (Add a space after text)*

39. Add **Acct # (CDMA)** after text.
40. Modify **Acct # (CDMA)** to only show the last 3 digits:

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- right ([Cert Deposits].[CD Master].[Acct # (CDMA)], 3)

41. Add a **Text item** after *Acct # (CDMA)* and continue typing the body.

- *, maturing on (Add a space after text)*

42. Add **Maturity Date (CDMA)** after text.
43. Add a **Text item** after *Maturity Date (CDMA)*.

- *. Please review our rate specials and contact us by (Add a space after text)*

44. Add a **Query calculation** named *Grace Period*.

- *_add_days ([Maturity Date (CDMA)], 7)*

45. Add a **Text item** after *Grace Period*.

- *(Start with a space) to receive this special offer.*

46. Change entire body text **Font:**

- *Size:* **12 pt**

47. Set **Padding:**

- *Top padding:* **.5 in**

48. Add a **Table** under the body.

- *Number of columns:* **3**
- *Number of rows:* **4**

49. Set *Top margin* to **.5 in.**
50. Add a **Text items** to all of the *Table cells.*

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51. Change *Table* **Font:**

- *Size:* **12 pt**

52. Change *Horizontal alignment* to **Center.**
53. Add a *Table* **Border**, located in *Show properties.*

- *Style:* **Ridge**

- *Width:* **4.5 pt**
- *Color:* **Navy**

54. Click ☐ **Apply All Boarders.**
55. Click **OK**.
56. Add additional *Boarders* if desired.
57. Add a **Table** under the rate specials.

- *Number of columns:* **1**
- *Number of rows:* **2**

58. Set **Margin:**

- *Top margin:* **.5 in**

59. Add a **Text item** in the first row.

- *Sincerely,*

60. Modify **Font:**

- *Size:* **12 pt**

61. Add a **Text item** in the second row.

- *Jack Henry*

Note: An image can also be used to insert a signature.

62. Modify *Font:*

- *Family:* **Georgia**
- *Size:* **22 pt**
- *Style:* **Italic**

<Customer Name 1 (CFMA)>
<Address 1 (CFMA)>
<Address 2 (CFMA)>
<City, State Zip (CFMA)>

Dear <Customer Name 1 (CFMA)1>,

You are a valued customer of Jack Henry, and we would like to offer you a special rate for rolling your CD account ending in <Acct # (CDMA)>, maturing on <Maturity Date (CDMA)>. Please review our rate specials and contact us by <Grace Period> to receive this special offer.

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Sincerely,

Jack Henry

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