

Using Quick Letters and Notes

Introduction

The Quick Letter functionality provides the means to create a letter addressed to a pupil/student's contact. The letter automatically includes relevant pupil/student details extracted from the SIMS database, e.g. parent/guardian address details, pupil/student names, etc. An editable template is provided and easy access to the letter is available via the **Links** panel in any pupil/student record. The letter can be printed, saved locally on your workstation or uploaded to the Document Management Server (DMS) as an attachment to the pupil/student record, making it available to other SIMS users.

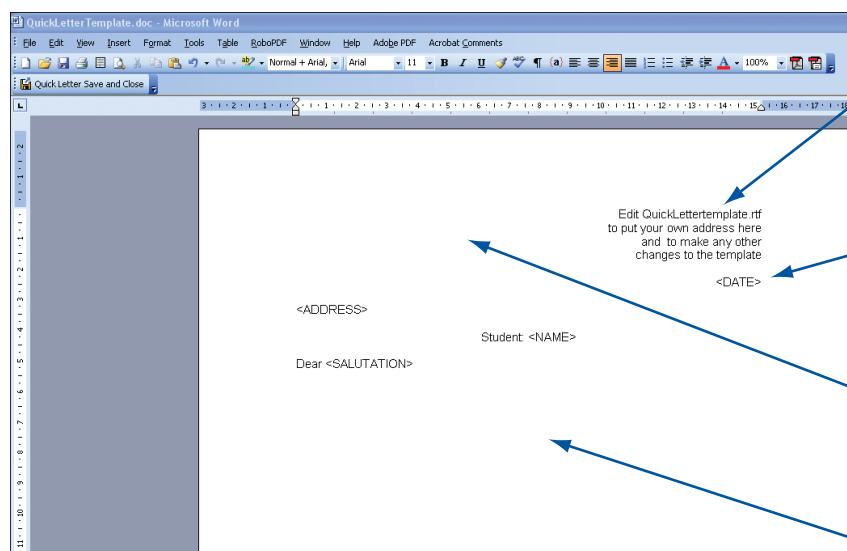
Editing the Quick Letter Template

The Quick Letter template (previously a .rtf file) is now a .doc file. The template includes macros that are designed to enable the insertion of pupil/student details, e.g. the pupil/student's name. It also provides the option to upload the completed letters to the DMS and to store them on your workstation.

IMPORTANT NOTES:

Before editing the QuickLetterTemplate.doc template, it is essential that the macro security in Microsoft® Word is set to **Medium** via **Tools | Macro | Security**.

To prevent any existing letters being affected, it is essential that the existing QuickLetterTemplate.rtf is not edited or deleted.



NOTE: If the **Security Warning** dialog is displayed, please click the **Enable Macros** button.

Creating a Quick Letter

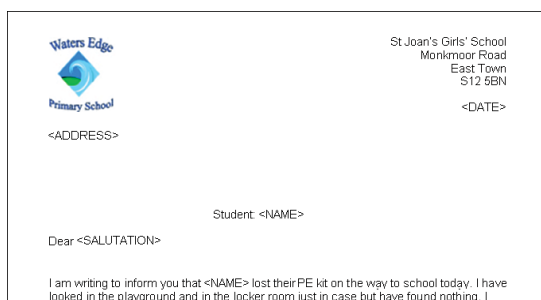
The Quick Letter can be accessed from the **Links** panel (right-hand side of the page) and also from many of the **Focus | Pupil (or Student)** menu routes.

IMPORTANT NOTE: Ensure that the **Parental Salutation** and **Parental Address** fields (**Focus | Pupil (or Student) | Pupil (or Student) Details – Family/Home** panel) are populated before creating the letter.

1. Select the required menu route, e.g. **Focus | Pupil (or Student) | Pupil (or Student) Details**.
2. After selecting the required pupil/student, click the **Quick letter** hyperlink in the **Links** panel to open QuickLetterTemplate.doc in Microsoft® Word.

The relevant information, i.e. the **DATE**, the parent/guardian's **ADDRESS** details and the pupil/student's **NAME** are retrieved from the SIMS database and inserted into the letter automatically. The **SALUTATION** is also inserted automatically, but only for the pupil/student's mother or father.

3. Enter the required text in the body of the letter and format the text accordingly.



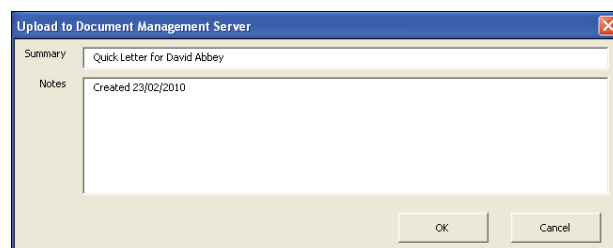
4. To produce a paper copy of the letter, select **File | Print**.
5. Save a copy of the letter to a location of your choice using the standard Microsoft® Word functionality, e.g. by selecting **File | Save As**.

Uploading a Quick Letter to the DMS

Uploading a letter to the DMS attaches the letter to the selected pupil/student's record. This enables the letter to be made available to other users (unless it is marked as private).

NOTE: The DMS must have been set up via **Tools | Setups | Document Management Server** to enable the letters to be uploaded successfully.

1. Click the **Quick Letter Save and Close** button in Microsoft® Word to display the **Upload to Document Management Server** dialog.



By default, a **Summary** of the letter and the date the letter was created is displayed. This information can be edited and additional information added, if necessary.

TIP: It is advisable not to press the **Enter** key when editing the **Summary** or **Notes**, as this action will save the letter to the DMS prematurely.

2. Click the **OK** button to save the letter to the DMS and close Microsoft® Word.

A message advises that the letter has been uploaded successfully.

3. Click the **OK** button to complete the process.

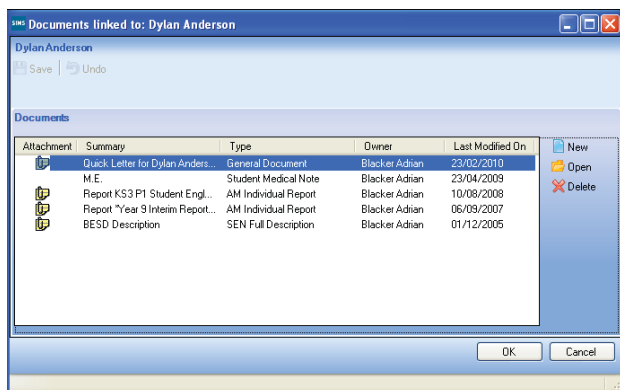
The **Status** of the letter defaults to **Public**, enabling access by all users. This status can be changed if required. Please see *Editing a Quick Letter* overleaf.

Using Quick Letters and Notes

Editing a Quick Letter

A letter that has been attached to a pupil/student record can be viewed and edited, as required.

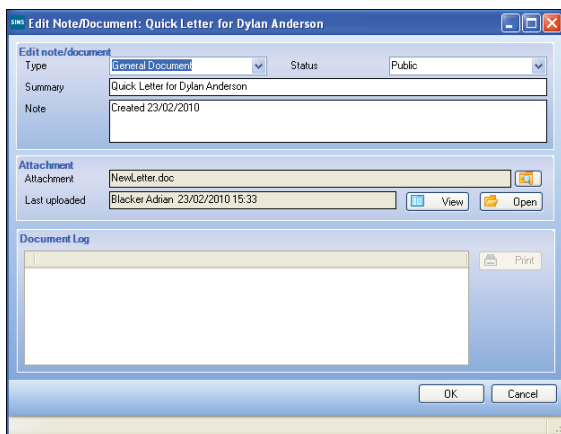
1. Select the required menu route, e.g. **Focus | Pupil (or Student) | Pupil (or Student) Details**.
2. Search for the required pupil/student then double-click their name to display the associated page.
3. In the **Links** panel, click the **Linked Documents** hyperlink to display the **Documents linked to** dialog.



4. If you are the owner of the letter and wish to edit its content from here, double-click an icon in the **Attachment** column to display the letter in Microsoft® Word.

The letter can also be opened from within the letter properties (as described in step 6).

5. To edit the letter properties, e.g. **Type**, **Summary**, etc. highlight the required letter then click the **Open** button to display the **Edit Note/Document** dialog.



If you have edited a previously uploaded document, the date the update was made, the name of the original owner of the letter and the name of the person who has edited it are displayed in the **Document Log** panel. This panel is blank unless an uploaded document has been edited.

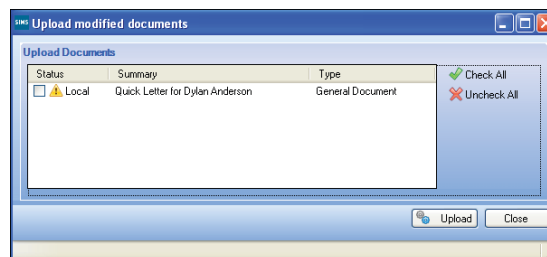
If necessary, edit the details in the **Edit note/document** panel. The default **Status (Public)** can be changed only if you are the owner of the document. The options are:

- **Public** letters are available to all users with view/add/edit permissions to the pupil/student area of SIMS.
- **Private** letters are available only to the user who attaches them.
- **Confidential** letters are available only to users who have School Administrator, Senior Management Team and Senior Coordinator access to SIMS.

6. If you are the owner of the letter and wish to edit it, click the **Open** button to display the letter in Microsoft® Word. If you are not the owner of the letter, click the **View** button to open it as read-only.
7. Make any necessary changes to the letter then select **File | Save**.
8. Close the Microsoft® Word document.
9. Click the **OK** button to close the **Edit/Note Document** dialog and return to the **Documents linked to** dialog.

A blue paper/pen symbol in the **Attachment** column indicates that the letter has been opened but not yet uploaded again to the DMS.

10. Click the **Save** button to display the **Upload modified documents** dialog.



11. Select the check box of the letter you want to upload then click the **Upload** button.

12. When the display in the **Status** column indicates that the letter has been **Uploaded**, click the **Close** button.



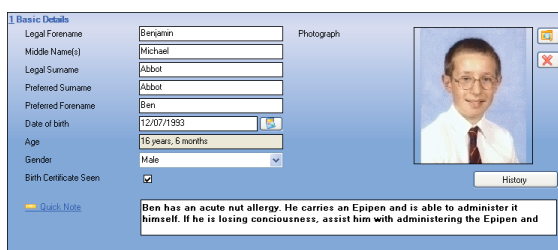
The next time the **Edit Note / Document** dialog is displayed (for viewing or editing), the **Document Log** panel will display details of this latest upload, together with any previous uploads.

The **Document Log** can be printed by clicking the **Print** button. Ensure that the printer settings are correct then click the **OK** button.

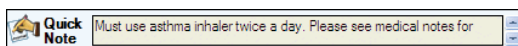
Using Quick Notes

There may be occasions when you wish to add an important note to ensure that any user with applicable permissions is aware of an important issue relating to a pupil/student. Quick Notes are entered in the **Basic Details** panel on the main **Pupil (or Student)** menu, after which they are also displayed on the **Student Teacher View** page.

1. Select **Focus | Pupil (or Student) | Pupil (or Student) Details** and search for the required pupil/student. In the **Basic Details** panel, there is a facility to add a **Quick Note** to a pupil/student's record.
2. Click the **Quick Note** icon to display the **Quick Note** comment box.



3. Enter a relevant note or warning of up to 255 characters then click the **Save** button.



Example of a Quick Note as displayed on the **Student Teacher View** page.

This guide is based on the version of the software (7.126) in use at the time of publication.

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