

Using Quick Letters and Notes

The Quick Letter functionality enables you 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

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 from being affected, it is essential that the existing *QuickLetterTemplate.rtf* is not edited or deleted.

1. In Windows Explorer, navigate to the location of the template file:

- For users on a shared workstation, ensure that a copy of the template is stored in your My Documents\My SIMS Documents folder.

Navigate to this location and double-click the *QuickLetterTemplate_local.doc* to display the template in Microsoft Word.

- For users on their own workstation, navigate to C:\Program Files\SIMS\SIMS.net then double-click *QuickLetterTemplate.doc* to display the template in Microsoft® Word.

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

2. Make any necessary amendments to the template then click the **Save** button.

NOTE: Additional fields cannot be added from SIMS.

The diagram shows a template with the following structure:

- Top right: A box with text: "A table without borders can be inserted at the top of the letter to enable a logo to be neatly positioned."
- Below that: "Edit QuickLetterTemplate.rtf to put your own address here and to make any other changes to the template"
- Left side: "<ADDRESS>"
- Right side: "<DATE>"
- Center: "Student: <NAME>"
- Below center: "Dear <SALUTATION>"
- Bottom right: "Enter and format any generic text in the body of the letter."
- Far right: "Enter and format the school details. Edits can include the school address, telephone number, email address, etc."
- Bottom right: "Items in angled brackets (< >) will be inserted into the letter automatically on creation."

Creating a Quick Letter

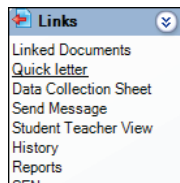
The Quick Letter can be accessed from the **Links** panel (right-hand side of the page) and also from many of the **Focus | Pupil (or Student)** menu routes.

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. Search for then select the required pupil/student.

3. 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.

If the letter is being sent to the pupil/student's mother or father, the **SALUTATION** is also inserted automatically.

4. Overtyping the place holder text (in top right-hand side of the page) with your school's address.

5. Enter and format the required text in the body of the letter.

The example letter includes:

- Logo: Waters Edge Primary School
- Address: St Joan's Girls' School, Monkmoor Road, East Town, S12 5BN
- Date: 08/05/2010
- Recipient: Mr and Mrs F Abbot, 16 Brickberry Close, Hampton Hargate, Peterborough, PE7 8AR
- Student: Benjamin Abbot
- Salutation: Dear Mr and Mrs Abbot
- Body: I am writing to inform you that Ben lost his PE kit on the way to school today. I have looked in the playground and in the locker room just in case but have found nothing. I have asked other pupils to look in the same direction to let me know if they see it.

6. To produce a paper copy of the letter, select **File | Print**.

7. 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 Document Management Server (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).

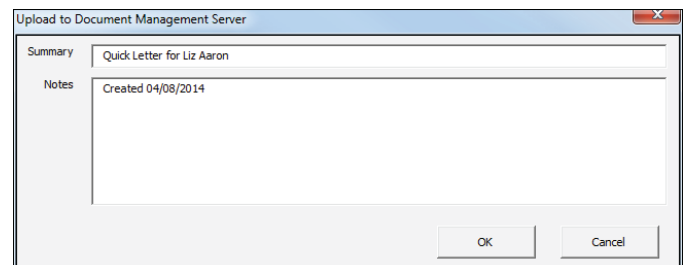
For more information about the Quick Letter processes, please refer to the *Managing Pupil/Student* handbook, which is available via the SIMS Documentation Centre. Click the **Documentation** button located in the top right-hand corner of the SIMS **Home Page** then click **Handbooks**.

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

1. Open the Quick Letter in Microsoft® Word.

2. Click the **Quick Letter Save and Close** button to display the **Upload to Document Management Server** dialog.

NOTE: The location of the **Quick Letter Save and Close** button varies depending on which version of Microsoft® Word you are using, e.g. In Word 2010, this option is on the **Add-Ins** tab.



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 **Enter** when editing the **Summary** or **Notes** because this action will save the letter to the DMS prematurely.

3. 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.

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

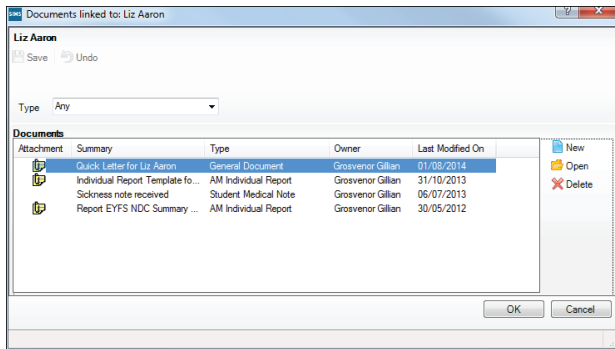
The **Status** of the letter defaults to **Public**, enabling access by all users. This status can be changed, if required. Please see *Editing a Quick Letter* overleaf.

Using Quick Letters and Notes

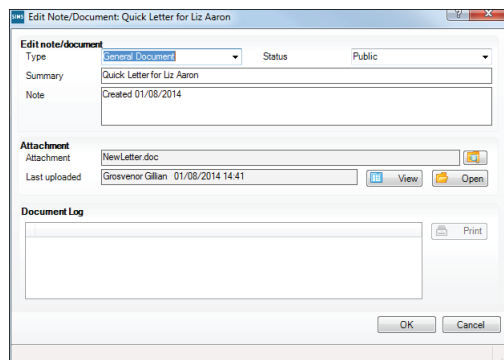
Editing a Quick Letter

A letter that has been attached to a pupil/student record can be viewed and edited via the **Linked Documents** hyperlink.

1. Open the required pupil/student page, 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. To filter the list to display only documents of a particular **Type**, select an option from the drop-down list. The options available are limited to the types of document currently linked to the pupil/student or applicant.
 5. If you are the owner of the letter and wish to edit its content, double-click the associated icon in the **Attachment** column to display the letter in Microsoft® Word.
- NOTE: The letter can also be opened from within the letter properties, as described in step 6 onwards.*
6. To edit the letter properties, 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.

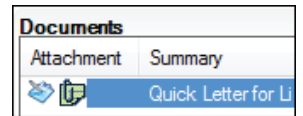
If necessary, edit the details in the **Edit note/document** panel.

7. 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.
8. If you are the owner of the letter and wish to edit it, click the **Open** button to display the letter in Microsoft® Word.

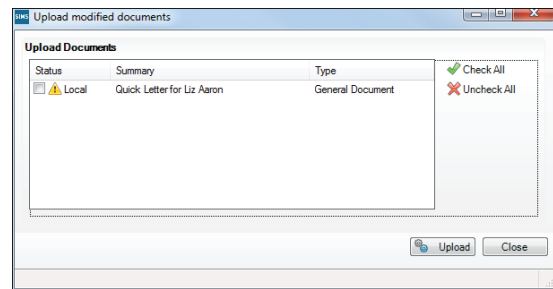
*NOTE: If you are not the owner of the letter, you can click the **View** button to open it as read-only.*

9. Make any necessary changes to the letter, select **File | Save** then close Microsoft® Word to return to the **Edit note/document** panel in SIMS.
10. Click the **OK** button to 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.



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



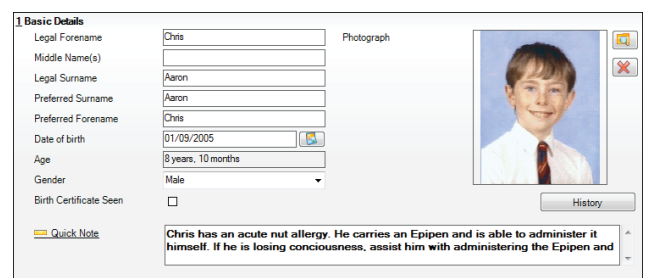
12. Select the check box adjacent to the letter you want to upload then click the **Upload** button.
13. When the display in the **Status** column indicates that the letter has been **Uploaded**, click the **Close** button.

Details of all uploads can be viewed in the **Document Log** panel in the **Edit Note/Document** dialog, which can be printed, if required.

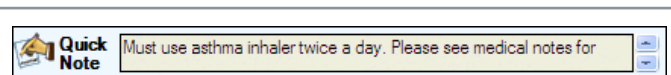
Using Quick Notes

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 **Pupil (or Student) Details** page, after which they are also displayed on the **Student Teacher View** page.

1. Select **Focus | Pupil (or Student) | Pupil (or Student) Details** then search for and select 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.



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

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