Litebite 14A

Using Communicate – Create Letter to create merged letters in Integris

For the Integris Administrator

The **Communicate – Create Letter** function is for merging documents (templates) with information from Integris (as letters, certificates etc.) for individual pupils or groups of children.

Documents merged through Communicate are also automatically stored in a pupil's **Docs & Comms** section of their record (which can be viewed by other users) and which can then transfer over into Parent Portal.

The **Communicate – Send Email** is used for **sending emails** to pupil contacts allowing for attachments (see **LiteBite 14B – Use Communicate for emailing**). However, please note that emails through Communicate are not secure therefore schools should be mindful not to include information either in the body of the email or in attachments.

It is usually the Administrator (or a user with ADMIN rights) who creates and generates merged documents or emails.

Please note:

- All of the template documents available for mailmerging through the Communicate Centre are located within **System Management > Preferences > Letter Templates**.

- The list of fieldnames you can use in your letter/document templates are available in the accompanying excel 'Letter Template Fieldnames' file (see link associated with LiteBite 14A).

Stage 1 – Create and upload a template document into Integris

Create a document template

1. Open Microsoft Word, and start a new document.
2. Create the document (e.g. a letter) as you want it to appear, using the appropriate fonts, spacing, images, and so on but leave out sections where you want the information to be fed by Integris (*see the example template letters at end of these notes*).
3. In the places where you want Integris to feed through the information, insert the appropriate mailmerge field from the list of fields available in the **'Letter Template Fieldnames'** spreadsheet.
   You can either type in the angle brackets and the fieldname i.e. between a < symbol and a > symbol; e.g. type **<KnownName>** to automatically insert the student's known name, type **<Class>** for the student's class name, and so on
   OR
   copy and paste the fieldname from the mailmerge list electronically (recommend you click on the fieldname cell and then copy from the *fx* box at the top of the spreadsheet as this ensures only the text is copied and not the whole cell)

   [**Note about Salutation fields** – if you have used Family Mail as a marker to identify contacts for communication purposes *(Refer to* **LiteBite23-Family Mail Marker**), then you will have amended the Salutation field in the PG1 and PG2 fields to reflect how the contact(s) should be addressed. To use the information you have entered into Salutation box, select fieldname **<AddeeSalutation>** to use in your document)

When you have finished creating the document and pasted all the fieldnames you need into the document, it should look like a standard document (e.g. letter) but with various mailmerge fields inserted where you want to capture data from Integris (*as per the examples p.6*). You need to ensure proper spacing exists around each fieldname and select the fieldnames as ordinary text to apply font styles and font size.

4. When you are ready to save the document at any point for the first time, select **File > Save As** to display the **Save As** dialog box.

5. In the **Save as type** drop-down list, select **'Rich Text Format (*.rtf)'**. *This is important because Integris only uploads RTF files for Communicate.*

6. Choose an appropriate location to save the template and type a suitable **File name** (use a name which reflects the purpose of the document and if related to a specific year group).

7. Click on **Save** to save the RTF letter template.

   After the first save is done as above, the document can just be saved as normal through File > Save.

Please note the following: **check the size of the file** - each template can be no larger than 10mb (otherwise it cannot be uploaded into Integris!). If you have included logos/pictures in your document, ensure that the images have been compressed to reduce storage space needed for them – see *Reducing size of template file* below.

This '.rtf' file is now ready to be uploaded into Integris – see overleaf.

Reducing the size of the template file

If your template file is large (over 10 MB), you must reduce its size before uploading into Integris.
Use either one of these methods to reduce your Word template file size (depending on your file and your software, you may only be able to use one of them):

Method 1: Compress the images in Word

1. Open the RTF file in Word.
2. Select the first image, right-click and choose Format Picture.
3. Click the Compress button at the bottom of the Picture tab screen.
4. Select the All pictures in document and the Web/Screen radio buttons. Click OK and Apply to confirm.
5. Click OK to close the Format Picture box.
6. Save the file again. The file size should be reduced.

Method 2: Copy the contents from Word into WordPad

1. Open the RTF file in Word.
2. From the Edit menu choose Select All. All the document contents are now highlighted.
3. From the Edit menu choose Copy.
4. Open WordPad from Start > Windows Accessories.
5. From the Edit menu choose Paste. All the document contents, including images, are now transferred.
6. From the File menu choose Save As. In the File As Type box choose Rich Text Format (RTF) (*.rtf). Enter a File name and click Save.

Upload a document (rtf) template into Integris

1. Select **Modules > System Management > Preferences** > **Letter Templates** tab.

2. Click on **Edit Details** (top-right option)

3. To upload the new template document, click on

4. Click on **Browse** and locate and select the document template file you saved earlier

5. Edit **Template Name** to be used in Integris - *by default this appears as the template filename but can be changed at your discretion if you wish.*

6. Type a **Description** for the template document to explain the purpose for its use e.g. *permission for trips etc.*

7. Click on **Upload** to upload the template file and you should then see template added to the list. *This template is now available to use with Communicate by all users.*

Notes

- If you want to download a template, you can select it, click on and follow the on-screen instructions.
- If you want to edit the name or description of a template, select it, click on and edit the details.

Stage 2 – Create and store merged letters/documents

To create a merged letter/document for an individual pupil you can either

1. **Go directly to a pupil record in Modules > General > Student Details** > select the required pupil record (*by typing in the child's surname or part of surname into the **Quick Search** field and click on Search icon*)

   > when the record is selected, click on ***Create a Letter*** link at the top right of the record

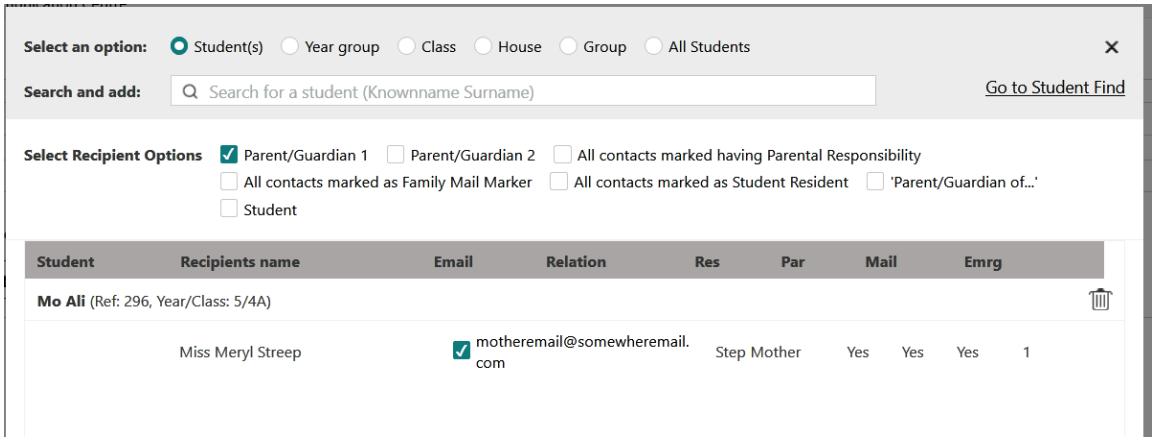
   If you want to create a merged letter for **several or a group of pupils**, go to ****** on page 6

   OR

   Go to **Modules > Communicate > Communicate Centre** > **Create Letter**
   > click on the **TO** button
   > click on **Go to Student Find** > select the required pupil record

   If you want to create a merged letter for **a group of pupils**, go to ****** on page 6

   You should now see the following screen:

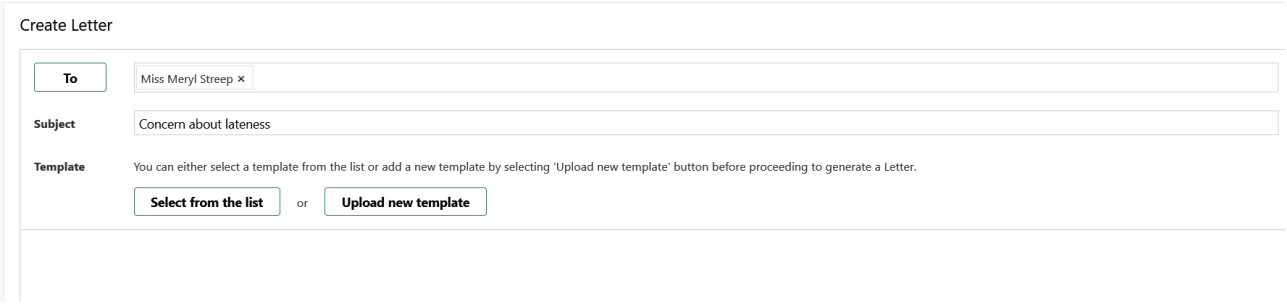


Important note: the default recipient option will be set to PG1 and the recipient name relating to PG1 will appear in the record under the pupil's name.

2. If you have set up **Family Mail** indicator (to denote contact or contacts identified for letters as per *LiteBite 23 – Using Family Mail marker*), then please remove PG1 and select '**All contacts marked as Family Mail Marker'**. This will add any additional contacts to the list (in cases of split parents) and will then create a letter for each contact marked as Family Mail.

3. Click **Add Selection** to move to the next step

   You should see the contact(s) names appear in the 'To' line



4. **Enter a subject note** for the letter in the ***Subject*** box

5. Click on ***Select from the list*** (*we don't recommend that you use the Upload new template option here as our recommendation for uploading letters is covered in Stage 1 above)*

   You should now see a list of your document templates previously uploaded and their descriptions.

6. **Select the document template required** and click **Ok**

*The letter template will then be listed (as an rtf file) – you can either remove it by clicking on the X if it has been chosen in error or you can **Open** it to check the content (it will still have the mergefields displayed)*

7. Click on **Generate Letter** to merge the details from the pupil record into the template document

You will see a message appearing:
Your letter(s) are queued for sending. This may take a few minutes. On success, you can find the entries in the Communication History screen.

Pls note: the letter will not be emailed!

8. Click **OK**

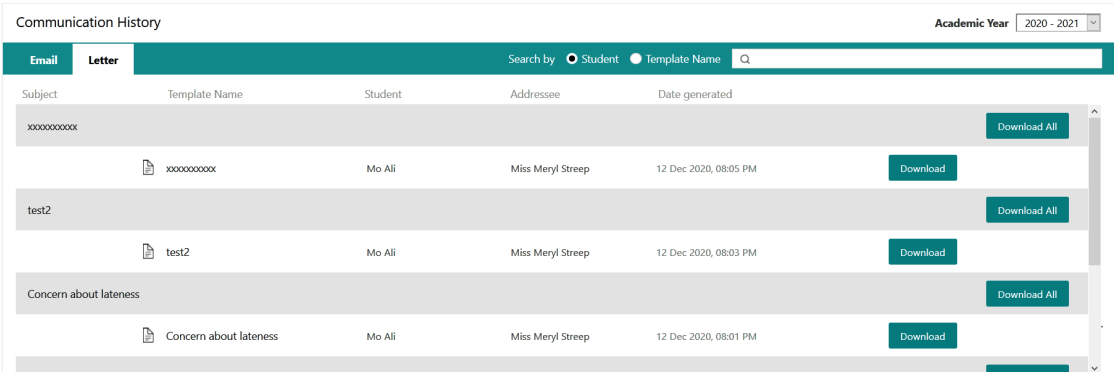
*You will be returned to the main **Communication Centre** screen*

9. Click on **Communication History** link > **Letters** tab to view details of the merged letter transaction

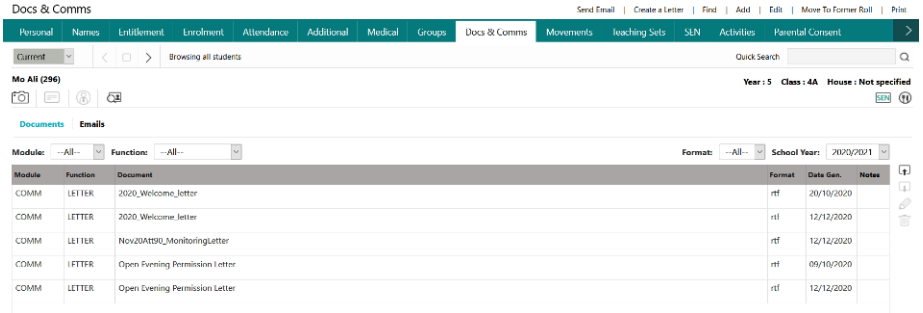
*You will see the text entered into the **Subject** line (in step 3 above) as well as the name of the document template used, student name and the salutation of the contact.*

You can view the list for an individual student by searching for a template name so that a record of letters created using the same template is displayed.

*You can also **Download** each merged letter to view merged content, to save the letter to an external location and for printing purposes if required.*



10. Each letter created for each pupil **will automatically be stored** in the pupils' **Docs & Comms** section of their pupil record.
Go to Modules > Student details > locate the pupil required > click on their **Docs & Comms** tab**.**

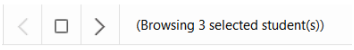


The merged letters generated will appear under the **Documents** list with 'COMM' listed as the Module used to create the letter. The list can be sorted into different sort orders by clicking the column header on the grey strip.
Note: COMM letters will transport across to the Parent Portal from the time at which your school starts to use the Parent Portal utility.

For more information about **Docs & Comms**, go **to** ***LiteBite 8 – Pupil Docs & Comms Store***

*****Selecting a group of pupils for Create a Letter

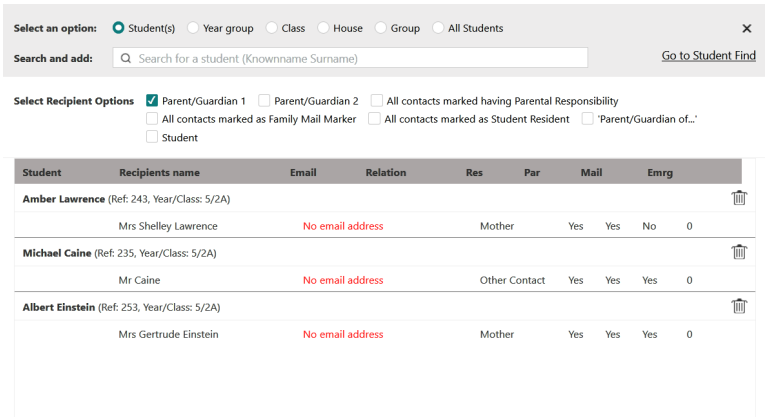
You can select your group of pupils in two ways – either through Student Details or Communication Centre:

Go to **Modules >** **General > Student Details**
> click **Find** (top-right option) and select a group of pupils (either by using CTRL & Click to select individual pupils from a list or by selecting a Year group or class group etc.)
> click **Select** and click **Yes** to the prompt
> the pupils are now held within a **Browse set** as indicated on 

screen

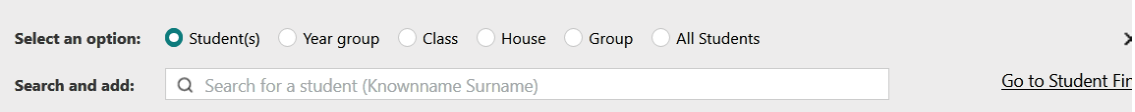
> then click the **Create a letter** link

The following ***Create Letter*** screen will display your selected pupils – you can at this point click the **Bin** icon to remove any from the selection. **Now follow from step 2 above**



OR

Go to Modules > **Communicate > Communication Centre** **> Create Letter** > click on the **TO** button



Click on **Year Group** option > click in the ***Search and Add*** box to view list of year groups and select each year in turn (as each year group is selected, the pupils in each are displayed on the right) and then click ***Add Selection***
Repeat as above for **Class**, **House** & **Group**.
To select ALL students, click the ***All Students*** option button and then click **Add Selection** – you should see total number of students appear in the To box.

Then follow from step 2 above.