

STIOffice – Letters & Forms

Preparing to Use Letters

In order to create and run letters from STIOffice, it is necessary that the workstation have Microsoft Word 97 or higher.

Before creating letters, the user must also set up the letter system file. (**Utilities | Letter Maintenance | System File**). This file is used to set default values such as the following:

- **Who:** Drop-down list to select guardian to whom the letter will be addressed.
- **Discipline Action to Post:** Drop-down list to select the action posted to discipline record as a result of sending a discipline letter. Codes for this drop-list are located in **Utilities | Code Maintenance | Most Codes| Action**.
- **Infractions to Post for Attendance Letters:** Drop-down list to select infractions posted to students' discipline records as a result of the attendance letter being printed and sent. Codes for infraction list are located in **Utilities | Code Maintenance | Discipline Infractions**. There are three attendance types for which letters may be sent. A different infraction may be selected for each type.
 - Daily
 - Period
 - Tardies
- **Default ID for Student Number merge field:** Drop-down list to select which ID number to use when a Student Number merge field is included in a letter.

Creating Letters

All letters to be generated within STIOffice are created in **Utilities | Letter Maintenance**. There are four types of letters:

- Attendance
- Discipline
- Student
- Teacher

Attendance

To create an attendance letter, perform the following steps:

- Click **Insert**.

- Determine a *Code* and *Description* of the letter to create.
- Click **Letter** to create the form letter itself.
 - Type the text of the letter as you would normally type any letter in Microsoft Word. The letter must contain at least one merge field.
 - Merge fields include data fields from student, guardian, date sent and many other options. Choose the data fields you wish to include from the **Insert Merge Field** menu. Do not use **Insert Word Field**.
 - To save a letter, go to **File | Save** (NOT **Save As**) in Word and then click **File | Exit** (not the **X** in the upper right corner of the screen). This will bring the screen back to STIOffice. Click the **OK** button here to save the letter in STIOffice.
- To copy a completed letter for alteration into a new letter, highlight the letter you wish to copy. Then click on the **Copy** button at right. STIOffice will prompt that the new letter will be saved under the *ZZZZ* name. Click **OK**. After the copy is made, change the *Letter Code* from *ZZZZ* to the new Letter Code by highlighting the letter in the Attendance Letters list and clicking **Change**. Click **Letter** to open the copied letter and make alterations.
- To delete a letter, highlight the letter in the list and click **Delete**.

Discipline

Select this option to create discipline letters to be printed for students with discipline concerns. These letters are created the same way as Attendance letters. At least one Merge Field must be used. Instead of dealing with *Period* fields, however, these letters have Infraction Merge fields:

- *Infraction_1* represents the first infraction in a student record that meets the first selected infraction for a letter to print.
- *Infraction_2* is used for printing a second letter for a second Infraction, etc.

Student

Select this option to create letters to send to any Student QBE filter, notifying them of some school event or general information. These letters are created as above. At least one Merge Field must be used.

- **User Info 5**: You may select up to five pieces of information from any of the 10 User Files.

Teacher

Select this option to create letters that may be sent to teachers notifying them of important school information. At least one Merge Field must be used.

Generating and Printing Letters

Attendance Letters

(Daily | Attendance Reports | Letters) – To print attendance letters, perform the following steps:

- Select Filter and Report Order.
- Type of Letter – Drop-down list to select.
- Dates:
 - *Starting Date* is the date from which you wish to begin calculating attendance.
 - *Ending Date #1* is the last date on which you ran letters of this type. On the very first attempt, this should be the same as *Starting Date*.

Student Letters


(**Students | Student Reports | Letters**) To print student letters, perform the following steps:

- Select filter and Report order.
- Select letter to print from drop-down list.
- Decide on what report options to print by checking the appropriate boxes.
- Default ID for Student Number merge field: Drop-down list to select which ID number to use when a Student Number merge field is included in a letter.
- Click **Print**.

Student Forms

(**Students | Add Edit Student** or **Student Desktop**)

Note: Forms must be created in **Utilities | Letter Maintenance | Student** before they may be used here. Forms must also be given names in **Utilities | Code Maintenance | Most Codes | Misc | Forms**.

- Select a student and click the  (**Forms and Documents**) button.
- Click **Insert**.
- Enter Date.
- Select the code from the drop-down list. You may choose to check the box for *Sent form*. You may also enter additional *Notes* regarding this form.
- Click the **Form** button and choose **Copy From**. Then select the correct document from the list.
- Click the **Edit** button and print the form according to selected print options.

Teacher Letters

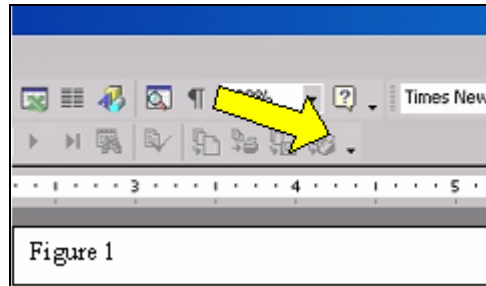
(**Teachers | Teacher Reports | Letters**) To print teacher letters, follow the same procedure used to print student letters.

WordXP (also called Word 2002) and Letters

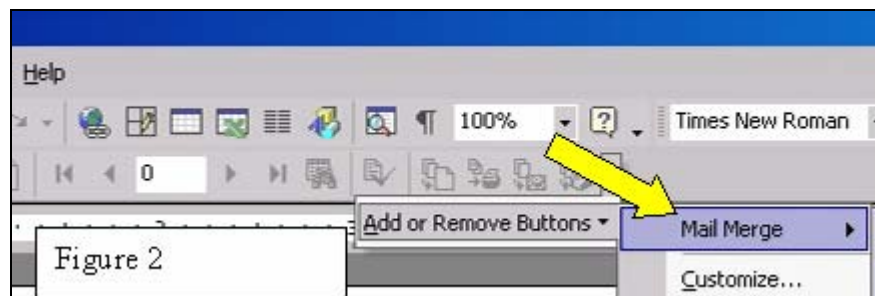
In order for the letters utility to function properly, a change must occur on any machine that uses Microsoft OfficeXP or WordXP. Note that this has nothing to do with the *operating system* WindowsXP; the problem will occur with any operating system, if OfficeXP is in use.

The problem has to do with the fact that the **Insert Merge Field** button is not placed on the Word toolbar in this latest version of Office. This seems to be due to the fact that Microsoft has changed the name of one of their buttons to **Insert Merge Fields** (note the plural *fields*). This button will appear, either as an icon or the actual words *Insert Merge Fields*. The user must manually add the **Insert Merge Field** button to the toolbar.

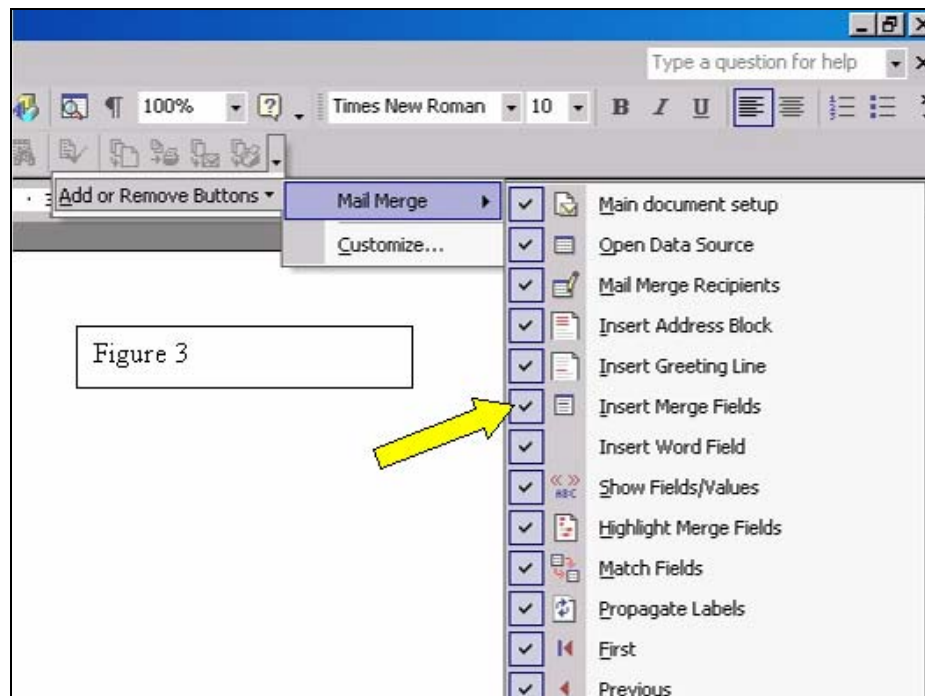
- In *Figure 1*, you see the arrow pointing to a small button. This button is the drop-down menu for adding new items to the toolbar.



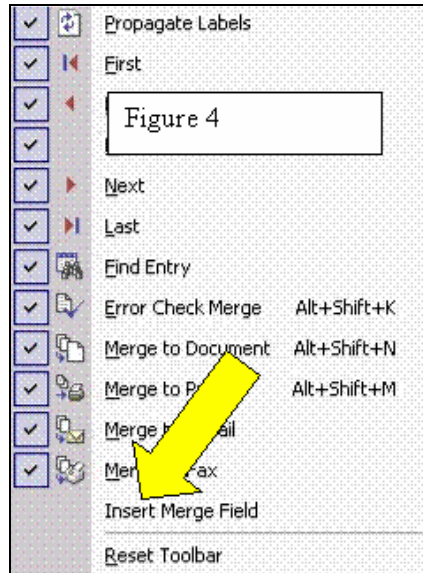
- In *Figure 2*, you see that when you click the button you get an **Add or Remove Buttons** option, which then expands to offer a **Mail Merge Option**. When you open *the Mail Merge* menu, you will see a dropdown of all the menus that are available for the *Mail Merge* Toolbar.



- In *Figure 3*, note the **Insert Merge Fields** (plural) button is already selected.



- In *Figure 4*, you will see that further down the list of available buttons there is an unchecked item that reads *Insert Merge Field* (singular). Make sure this item is checked (click on it to select it).



A button will then be added to the toolbar (see *figure 5*) which enables the **Insert Merge Field** feature in Word. This will, when clicked, enable the STIOffice Merge fields.

