



How to Design a Letter Report

Applicable to SIMS .net version

7.78 onwards.

Permissions required

You will need to be a member of any of the following User Groups in System Manager to design reports: *Assessment Coordinator, Class Teacher, Pastoral Manager, School Administrator, Senior Management Team, System Manager, Teachers' Desktop User.*

Introduction

This help sheet describes how to design a simple letter report using the Word mailmerge report output. It includes the creation of a reusable letter template. The example report used throughout this help sheet is a letter to the parent/guardians of pupil/students receiving an award for excellent behaviour and is designed as follows:

Fields: Surname, Legal Forename, Reg Group, Parental Salutation, Parental Addressee, Address Block.

Sort Order: Date of Birth

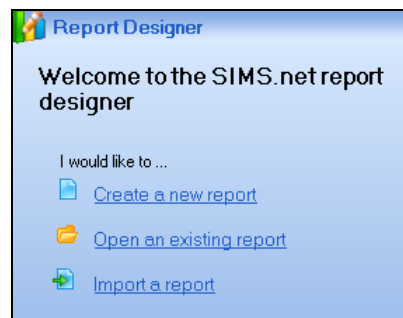
Filters: Select Registration Group when the report is run

A filter can be applied to enable the user to choose which Registration Group to report on. Using preview mode, the pupil/students who you do not wish to receive the letter can be removed from the final report. For more information, please see *How to Preview Reports help sheet* (SupportNet Resource Number 11133).

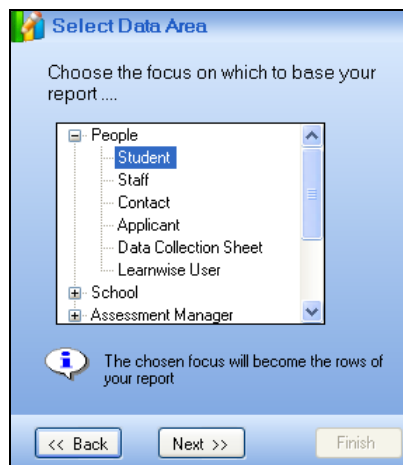
It is assumed that you are familiar with designing simple reports and this help sheet therefore includes only brief instructions on selecting data fields, sort order, etc. For more detailed instructions, please refer to the *How to Design a Simple Report help sheet* (SupportNet Resource Number 11128).

Creating a new report

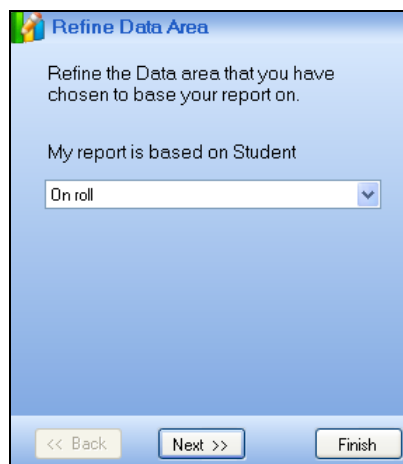
1. Select **Reports | Design** to open the **Report Designer**.



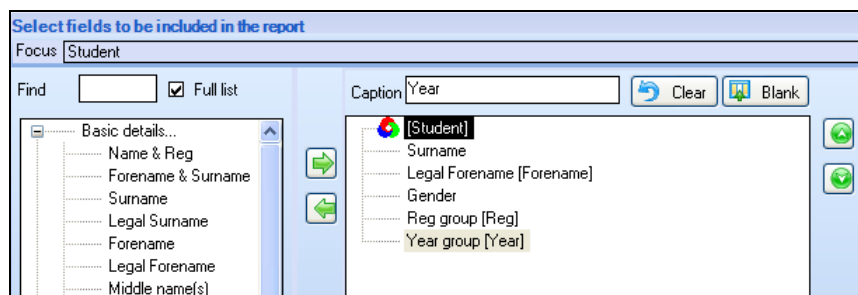
2. Click the **Create a new report** hyperlink to display the **Report Wizard** and **Report Summary**.



3. Select **Student** as the Focus of the report then click the **Next** button on the **Report Wizard** to move to the **Refine Data Area** page.

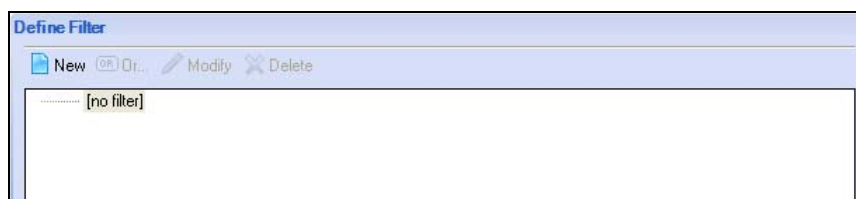


4. Select **On roll** from the **My report is based on Student** drop-down list then click the **Next** button on the **Report Wizard** to move to the **Select Data Fields** page. The **Select fields to be included in the report** panel is displayed.
5. Select the data fields to include in the report by double-clicking each field in the **Select fields to be included in the report** panel.

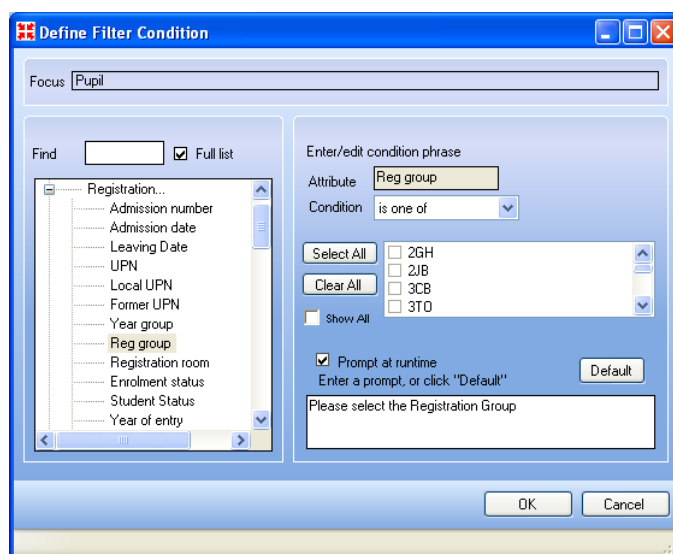


TIP: The captions for the fields included in the report are used as the mailmerge field names when creating the mailmerge document. You may prefer to rename some of the captions. Highlight the required field and overtype the caption.

6. Click the **Next** button on the **Report Wizard** to move to the **Apply Filter** page of the Wizard.

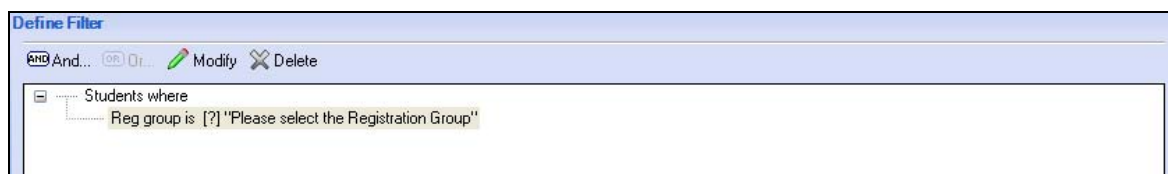


7. If required, apply any required filters by clicking the **New** button to open the **Define Filter Condition** dialog.



8. The previous and following example shows a filter enabling the user to choose a Registration Group at run-time.

*NOTE: With some values, such as Registration Groups, Year Groups, Look Up Values such as SEN Status, etc., only active items (e.g. this year's Year Groups) are available for selection. If you want to select from all the available items, ensure the **Select All** check box is selected.*



9. Click the **Next** button on the **Report Wizard** to move to the **Define Sort Order** page.
10. The example report is produced in Surname and Legal Forename order by default. Change the sort order if required, by double-clicking the fields on which to sort.

Select fields on which to sort the report

Focus: Pupil

Find: ☒ Full list

Sort fields (tick for descending):

☐ Date of birth

Basic details...

- Surname
- Legal Surname
- Forename
- Legal Forename
- Middle name(s)
- Initials
- Date of birth

11. Click the **Next** button on the **Report Wizard** to move to the **Specify effective date** page.

Specify effective date

Your report is capable of being run at an effective date other than today. If you wish to supply an effective date other than today please indicate your choice here

☐ Use Effective Date 24/07/2006

☐ Supply Effective Date at run time

<< Back Next >> Finish

12. Specify an effective date if required. Click the **Next** button on the **Report Wizard** to move to the **Define Presentations** page.

Define presentations

Here you can design the settings for the different types of output

Select the presentation for the report

Presentation

- Word List Report
- Word Mailmerge
- Form Report (RTF)
- Excel
- Web page
- Text
- Analysis

☐ Allow choice of output at run-time

<< Back Next >> Finish

13. Select **Word Mailmerge** from the **Presentation** list to display the **Word Mailmerge Settings** panel.

Word Mailmerge Settings

Merge Document

To set up Word Mailmerge, you must create and associate a mailmerge document. Do this by clicking the New button which will launch Word. The report fields will be available on a toolbar button. In order to use existing label templates, use Open to select one

Once you have edited it, you must save the Word document, close Word then save the report design immediately. This associates the mail merge document with the report design.

If you click the Delete button, the association will be broken. If you wish to revert back to the original mailmerge document, you must reload the report design.

Please see the on-line help for more information.

14. Enter a title for the report in the **Report Title** field if required.
15. Deselect the **Suppress duplicates** check box only if you want any duplicate records to appear in the report.
16. Click the **New** button to create a new mailmerge document.
17. A Word document called `ReportMailmerge.doc` is opened. The document is blank, but contains an additional mailmerge toolbar.

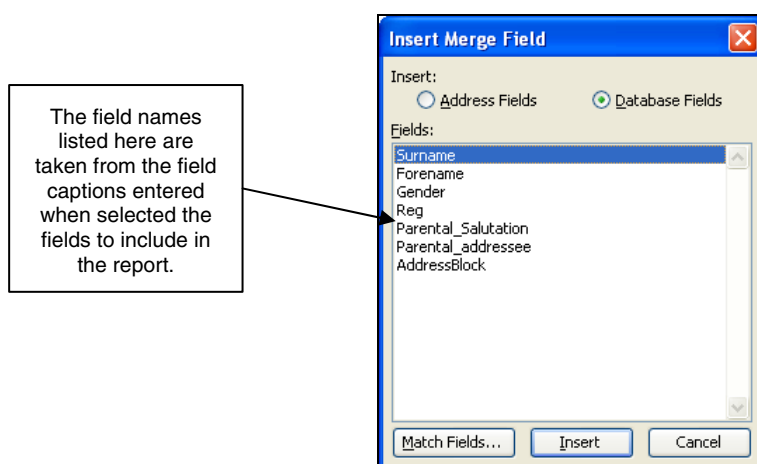


18. Enter the text for the letter, together with a school logo and address, if required. To insert merge fields, ensure the cursor is positioned where you want to insert a merge field then click the **Insert Merge Fields** button on the toolbar.



Insert Merge Fields button

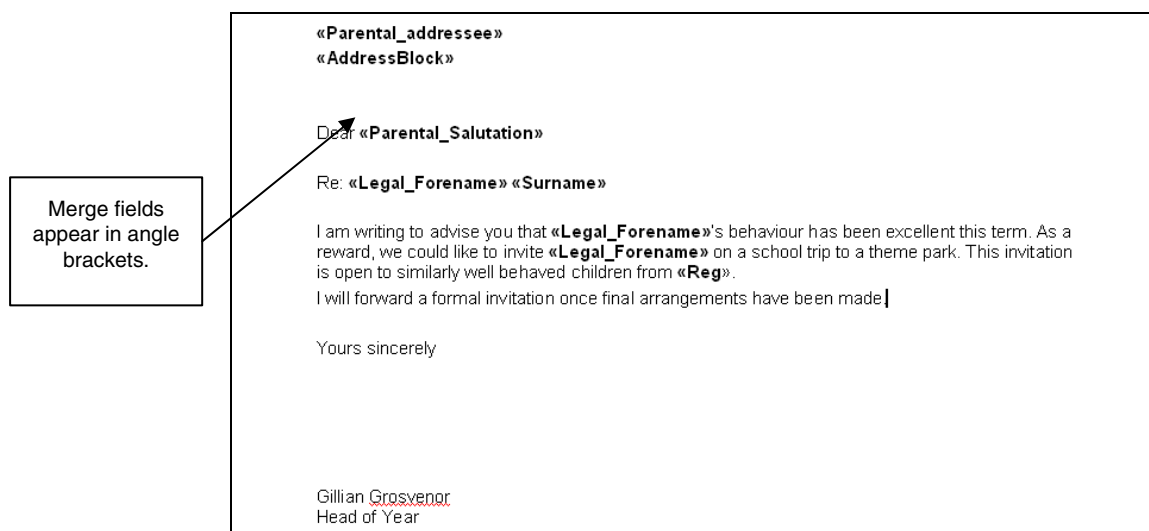
19. The **Insert Merge Field** dialog is opened listing all the available mailmerge fields. Highlight the required field and click the **Insert** button.



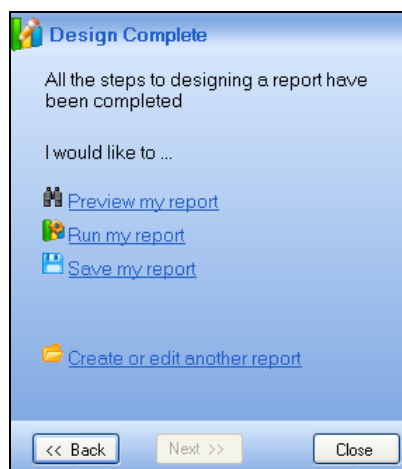
The merge field will appear in the document in angle brackets, e.g. <<Legal_Forename>>.

20. If no spaces or punctuation are required, continue adding additional merge fields. If you need to add punctuation (such as spaces), further text, etc. or you need to move to a different location in the document, click the **Cancel** button on the **Insert Merge Field** dialog to go back to the document. Make the necessary changes then insert more merge fields as described in steps 18 and 19.

The following example shows the mailmerge document for the example report.

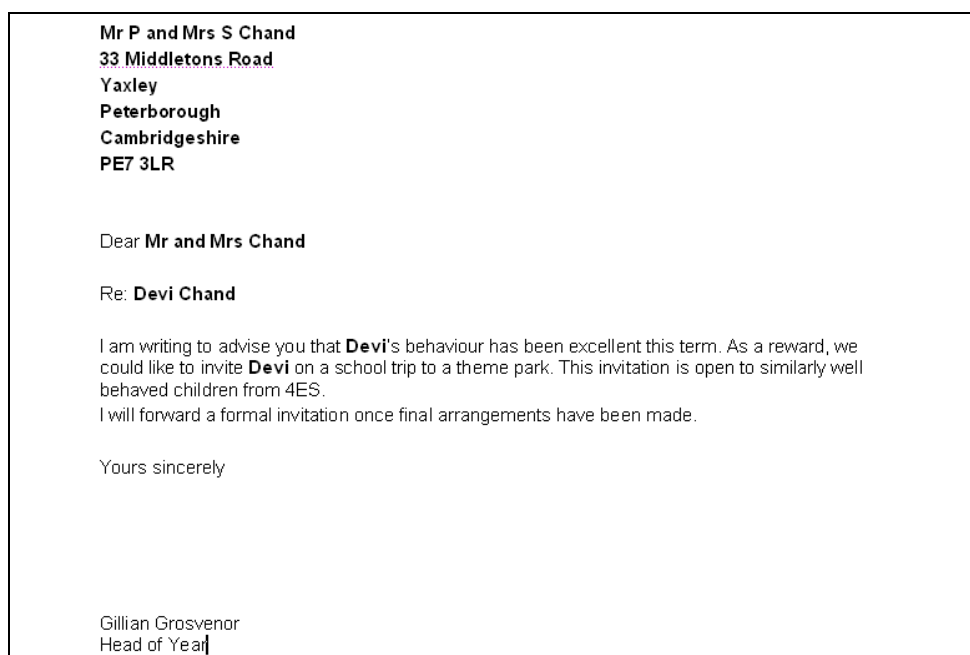


21. Once you have inserted all the required merge fields, formatted the document (noting that merge fields can be formatted in the same way as normal text), click the **Save** button on the Word toolbar. Close the mailmerge document and return to SIMS .net. If you want to re-use this mailmerge document as a template for use when creating other letters for example, please see *Saving a mailmerge document as a mailmerge template on page 6*.
22. Click the **Next** button on the **Report Wizard** to move to the **Design complete** page.



23. Either run, preview or save the report as required by clicking the applicable hyperlink. Once the report has been saved, the mailmerge document will be stored with the report design.

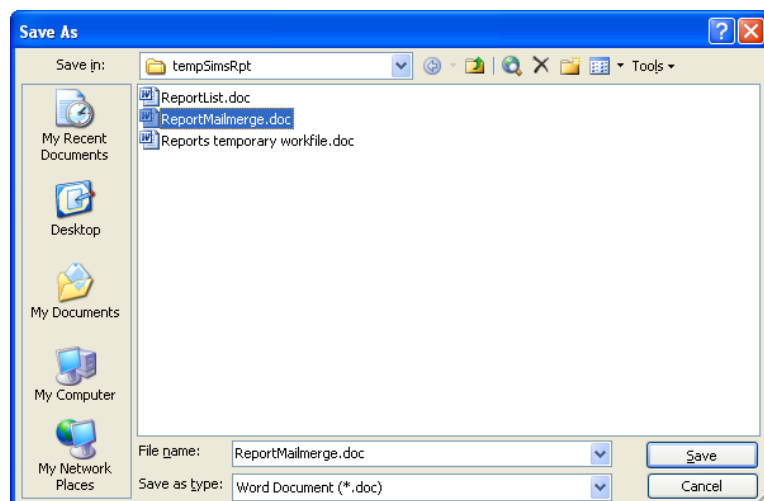
When run, the example report will look similar to the following:



Saving a mailmerge document as a mailmerge template

Any mailmerge document can be saved for use as a mailmerge template. This will enable you to create a very similar letter, each containing the parental names, addresses, etc. but with different letter text.

1. With the required mailmerge document open, instead of clicking the **Save** button on the Word toolbar, select **File | Save As** to open the **Save As** dialog.



2. The template is given a default name of **ReportMailmerge.dot** which should be renamed to easily identify the content of the template, e.g. **standard_award_letter.dot**.
3. By default, mailmerge templates that you create are stored in the \Program Files\SIMS\SIMS .net\tempRpt folder. We recommend saving the template in \Program Files\SIMS\SIMS .net. This ensures that your template appears in the same list as those supplied by Capita Education Services.
4. Click the **Save** button to save the template to the chosen location.

For more information, please refer to:

- *Reporting in SIMS .net handbook* (double-click **Reporting** on the **Documentation** shortcuts panel in SIMS .net).
- *How to Design a Simple Report help sheet* (SupportNet Resource Number 11128).
- *How to Preview Reports help sheet* (SupportNet Resource Number 11133).
- *How to Run Reports help sheet* (SupportNet Resource Number 11125).
- *How to Save or Delete Reports help sheet* (SupportNet Resource Number 11136).
- *How to Edit the Quick Letter Template* (SupportNet Resource Number 11047).
- *How to Design a Word Mailmerge Report Output help sheet* (SupportNet Resource Number 10217).
- *How to Design a Form Report (RTF) Output help sheet* (SupportNet Resource Number 10208).
- *How to Design a Letter Report help sheet* (SupportNet Resource Number 10243).
- *How to Design a Word List Report help sheet* (SupportNet Resource Number 11169).
- *How to Design a Text Report Output help sheet* (SupportNet Resource Number 10207).
- *How to Design a Web Page Report Output help sheet* (SupportNet Resource Number 10206).

For access to all available help sheets, please select **Documentation** from the **Resources** drop-down list on the SupportNet home page (<http://support.capitaes.co.uk>), then select **Help Sheets** from the **Categories** drop-down list.

Training courses

For information on training courses, please contact your SIMS Support Provider.

Providing feedback on this help sheet

If you have any suggestions or comments about this or any of our other help sheets, please email helpsheets@capita.co.uk.

Help sheet revision history

Doc. Version	Change Description	Date
1076-001	Initial Release	20/02/06
1076-002	Updated to reflect SIMS .net new looked released with 7.78 plus some general improvements to text.	02/08/06