

InformationNOW – Letters

About this Guide

This Quick Reference Guide provides an overview of letters in *InformationNOW*. There are three types of letters:

- **Student**: May be used to create various letters, forms, customized labels or certificates.
- **Attendance**: May be printed based on daily or period attendance records, number of absences, specific attendance codes and a date range.
- **Discipline**: May be printed based on a date range, infractions, dispositions and demerits.

Access to letters is controlled through permission maintenance. Also, letters are unique to the school. If a letter is created for one school, it will not be visible to users in another school. Once a letter has been created, it cannot be modified.

Note: It is recommended that once a letter is sent to a student, it should not be deleted from the list. See the note at the end of the section “Viewing Sent Student Letters” on page 11 for more details.

Data Source for Letters

Letters within *InformationNOW* utilize a data source which contains the various merge fields that may be inserted into the letter. The merge fields available depend on the letter type selected. To allow multiple users to access the same data source, it is recommended that an administrative user create a folder (with a name such as `\\InfoNowLetters`) on a shared network drive that is accessible by all users. Within this folder, create three additional folders representing the three types of letters: *Attendance*, *Discipline* and *Student*.

Download Data Source

This is a one-time only step that must be performed for each of the three letter types. Once the data source is created for each letter type, it is not necessary to create the data source again unless advised to do so by STI Support.

Attendance Letters Data Source

- Go to **School/District | Setup** and select the lookup of **Letters**.
- Choose the letter type of **Attendance** and then click **Refresh**. Previously created letters will display. Click **Add**.

Add Letter

Letter

*Letter Type: Attendance *Name: 5 Unexcused Daily Absences

Description: To be sent to students who have reached 5 unexcused daily absences.

Create Cancel

- Confirm that the correct letter type of **Attendance** is selected.
- Enter a name (ex.: *5 Unexcused Daily Absences*). *Description* is optional. Click **Create** or, if desired, click **Cancel** to exit the *Add Letter* screen.
- On the *Setup: Letters* screen, click the name of the letter just created.

Setup: Letters

Lookup Settings

Select a lookup: Letters Letter Type: Attendance Refresh

Letter Name	Description
5 Unexcused Daily Absences	To be sent to students who have reached 5 unexcused daily absences.

- Click **Download Datasource**.

Edit Letter: 5 Unexcused Daily Absenc

Letter

*Letter Type: Attendance *Name: 5 Unexcused Daily Absences

Description: To be sent to students who have reached 5 unexcused daily absences.

OK Close

Tasks: Print Screen, Copy A Letter, Download DataSource, Upload A Letter, Help

- Save the *DataSource.dot* file to the desired folder (ex.: \\InfoNOWLetters\Attendance folder).

Note: If Internet Explorer is being used and the *Save/Open* screen does not open, try holding the *Ctrl* key while clicking **Download Source**. If this does not solve the problem, in the main browser window, go to **Tools | Internet Options** and select the *Security* tab. Click **Custom Level**. Under the *Downloads* section, enable *Automatic prompting for file downloads*. Click **OK** to save the changes and then click **OK** to close the *Internet Options* screen.

- When save is complete, click **Close**.

Discipline Letters Data Source


- Go to **School/District | Setup**. Select the lookup of **Letters**. Select the letter type of **Discipline** and click **Refresh**.
- Previously created letters will display. Click **Add**.
- Confirm that the correct letter type of **Discipline** is selected.
- Enter a name (ex. *Parental Notice*). *Description* is optional. Click **Create** or if desired, click **Cancel** to exit the *Add Letter* screen.
- On the *Setup: Letters* screen, click the name of the letter just created.
- Click **Download Datasource**.
- Save the *DataSource.dot* file to the desired folder (ex.: \\InfoNOWLetters\Discipline folder).
- When save is complete, click **Close**.

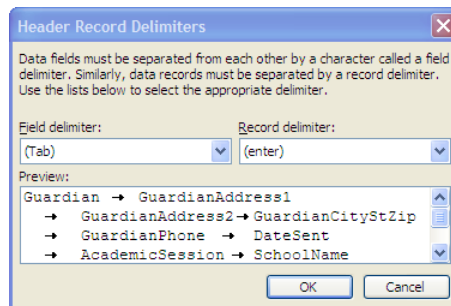
Student Letters Data Source

- Go to **School/District | Setup** and select the lookup of **Letters**. Choose the letter type of **Student** and click **Refresh**.
- Previously created letters will display. Click **Add**.
- Confirm that the correct letter type of **Student** is selected.
- Enter a name (such as *Field Trip*). *Description* is optional. Click **Create** or click **Cancel** to exit the *Add Letter* screen.
- On the *Setup: Letters* screen, click the name of the letter just created.
- Click **Download Datasource**.
- Save the *DataSource.dot* file to the desired folder (ex.: \\InfoNOWLetters\Student folder).
- When save is complete, click **Close**.

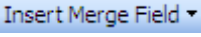
Letter Setup

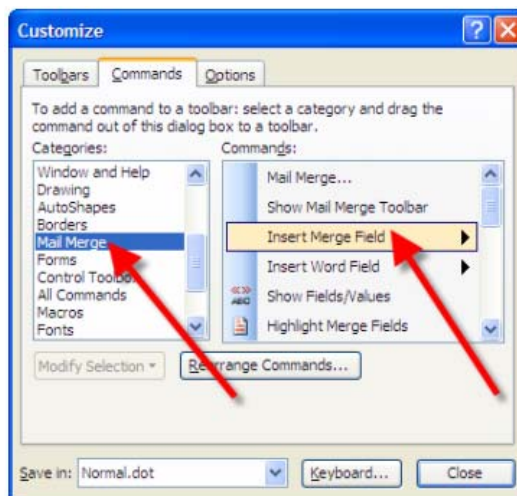
Attendance Letters Setup

- Open a new Microsoft Word document.
- Click **View | Toolbars**. Make sure the *Mail Merge* toolbar is checked.
- Click the **Open Data Source**  icon.
- Navigate to the folder in which the *Attendance Data Source* was created (ex.: \\InfoNOWLetters\Attendance folder). Highlight the *DataSource.dot* file and click **Open**.

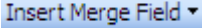


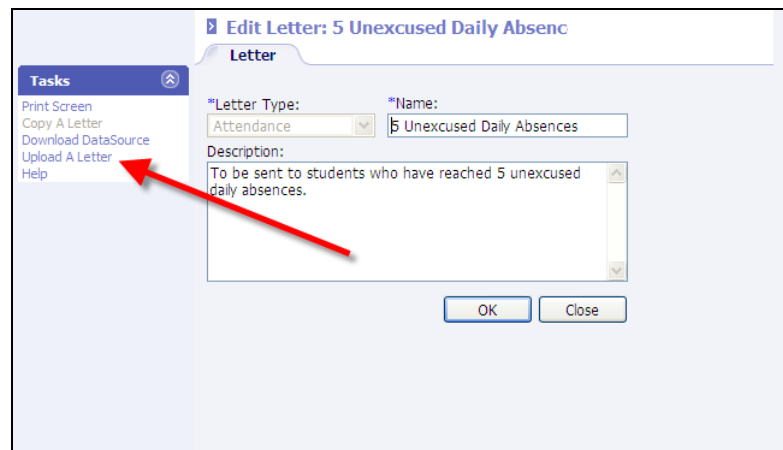
- *Field Delimiter* should be set to **(Tab)**. *Record Delimiter* should be **(enter)**. Click **OK**.

Note: If the **Insert Merge Field** button  does not display on the tool bar at top, click **View | Toolbars | Customize | Commands** tab (if using a version of Word prior to Word 2007, select **Tools | Customize | Commands** tab).

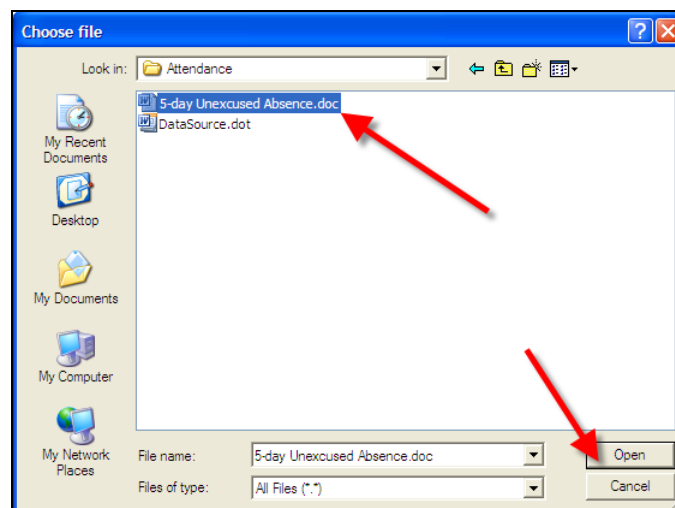


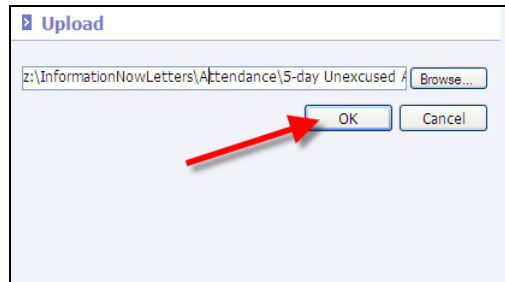
Select **Mail Merge** from list at left and scroll to the **Insert Merge Field** option. Drag/drop the **Insert Merge Field** button to the toolbar.

- Use Microsoft Word to create the letter. Use the **Insert Merge Field** button  to add data elements from *InformationNOW*, including Guardian, School and Student data.
- When finished, click **File | Save As**. Navigate to the folder where the data source was created (ex.: \\InfoNOWLetters\Attendance folder).
- Give the file a meaningful name (ex.: *5dayunexcused*). Click **Save**.
- Exit Microsoft Word.
- In *InformationNOW*, go to **School/District | Setup**. Select the lookup of **Letters**. Select the letter type of **Attendance**. Click **Refresh**.
 - To edit an existing letter, click the name of the letter.
 - To create a new letter, click **Add**. Type the name of the letter. If desired, enter a description. Click **OK**. Click **Cancel** to exit the *Add Letter* screen. To edit, click the name of the letter.
- Click **Upload A Letter**.



- Browse to the folder in which where the Microsoft Word .doc file was created.
- Click the name of the letter that was created and click **Open**.





- Click **OK**. The *Upload* letter screen will return. Click **Cancel**.
- Click **OK** to save the changes to the letter.

Discipline Letters Setup

The steps in the *Attendance* section above may be duplicated to create discipline letters. Letters should be saved to the discipline letter folder (ex.: \\InformationNowLetters\Discipline\). The list of available merge fields includes discipline-specific data.

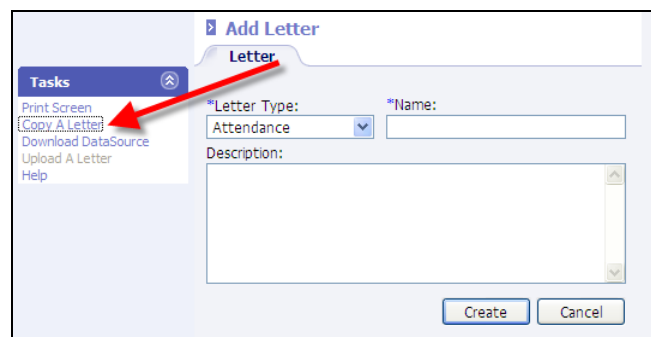
Student Letters Setup

The steps in the *Attendance* section above may be duplicated to create student letters. Student letters should be saved to the student letter folder (ex.: \\InformationNowLetters\Student\). The list of available merge fields includes student and guardian data.

Copying Letters

Existing letters may be copied from one school to another, perform the following steps:

- Log into the school to which the letter is to be copied.
- Go to **School/District | Setup**. Select **Letters** from the *Select a lookup* drop-list. Select the *Letter Type* (i.e., **Student, Attendance, Discipline**) from the drop-list and click **Refresh**.
- Click **Add** to create a new letter. Do not select a *Letter Type* or enter a *Name*. This will be populated when the letter is copied.
- Click **Copy A Letter** under the *Tasks* menu.



- On the *Copy A Letter* form, select a school from the drop-down and click **Refresh**.

The screenshot shows the 'Copy A Letter' interface. At the top, there's a 'School Letters' section with a 'School:' dropdown menu currently set to 'Hometown High School'. A red arrow points to this dropdown, and another red arrow points to the 'Refresh' button next to it. Below the dropdown is a table with three columns: 'Name', 'Type', and 'Description'. The table has one row with the following data: '5 Unexcused D...' in the Name column, 'Attendance' in the Type column, and 'To be sent to students who have rea...' in the Description column. At the bottom right of the form are 'OK' and 'Cancel' buttons.

- A list of existing letters for that school will appear. Bullet the letter to be copied and click **OK**. The *Letter Type*, *Name* and *Description* will be copied from the other school.
- Click **Create**.

Note: Duplicate names are not allowed. If a message displays indicating that the name already exists, simply change the name and click **Create**.

- Click **Close** to exit *Add Letter* screen.

Upload A Letter

Once the letter is created, the actual Microsoft Word document, including all of the data merge fields, must be uploaded.

- From the *Setup: Letters* screen, click the name of the letter that was just copied from another school.
- Click **Upload A Letter**.
- Click **Browse** to locate the Microsoft Word file containing the letter content including data merge fields.
- Click **OK** to upload the letter. The screen will flash and return to the same state as before.
- Click **Cancel** to exit the *Upload* screen.
- Click **OK** to exit the *Edit Letter* screen.

Printing Letters

- Letters may be generated from the corresponding module (ex.: **Attendance | Reports | Attendance Letters**) or from the *Reports* menu.

Printing Attendance Letters

- Go to **Attendance | Reports | Attendance Letters** or to **Reports | Attendance Letters**.

Attendance Letters

Criteria

Student Filter: [dropdown]

*Start Date: 08/03/2010 [calendar icon]

End Date Range

*From: 01/17/2011 [calendar icon] *To: 01/21/2011 [calendar icon]

*Letter: 3 Unexcused Daily Absences [dropdown]

*Order By: Last Name [dropdown]

Include Withdrawn

Absences

Include Absences

Absence Reasons: [dropdown]

Number of Absences: 0

Absence Type

Daily
 Across all Periods
 In a Single Period

<input checked="" type="checkbox"/>	Code	C	Reason
<input checked="" type="checkbox"/>	COL	E	College Visit
<input checked="" type="checkbox"/>	Court	E	Court
<input checked="" type="checkbox"/>	DR	E	Doctor/Dentist
<input checked="" type="checkbox"/>	FNR	E	Funeral
<input checked="" type="checkbox"/>	II	E	II
<input checked="" type="checkbox"/>	NI	I	No Note

Tardy Count

Include Tardy Count

Tardy Reasons: [dropdown]

Tardy Count: 0

Tardy Type

Daily
 Across all Periods
 In a Single Period

[Execute] [Close]

- **Student Filter:** Attendance letters will be generated for students who have reached a specific threshold of absences. To check a subset of students, select the appropriate filter. To check all students, leave the *Student Filter* blank.
- ***Start Date:** Enter the *Start Date* from which to begin counting absences. For example, to start counting from the beginning of school, enter the 1st day of attendance for the school year.
- ***End Date Range:** Enter the *End Date Range*. For example, to print letters for students who have accrued 7 unexcused absences since the start of the school year (ex. 08/03/09) and who hit this 7-absence mark during the month of February 2010, users would set dates as below.

The program will count absences beginning from the start date (08/03/09) and will include any students who hit the 7-absence mark within the dates of 02/01/10 and 02/28/10.

- ***Letter:** Select the type of letter from the drop-list.

- ***Order By:** Select the *Order By* of *Grade Level, Last Name, Student Number* or *Zip Code*.
- **Include Withdrawn:** Check to include students who are currently withdrawn.
- **Include Absences:** Check to include the absences on the report. If selected, the *Absence Reasons, Number of Absences* and *Absence Type* fields will become active.
 - ***Absence Reasons:** Optional. Select the Absence Reason type (*Excused, Unexcused*). When selected, all absence reasons matching the selected type will be checked below. Alternately, users may check each individual absence reason code to be included in the count. Use *Ctrl+click* or *Shift+click* to select multiple reasons. If no Absence Reasons are selected, all absence reasons will be included in the count.
 - ***Number of Absences:** Enter the threshold of absences for which to generate letters. For example, to generate letters for students who have missed 5 absences within the specified date range, enter a 5.
 - **Absence Type:** Select the absence type of *Daily, Across All Periods* (absences in any period) or *In A Single Period* (absences occur in the same period).
- **Include Tardies:** Check to include the tardies on the report. If selected, the *Tardy Reasons, Tardy Count* and *Tardy Type* fields will become active.
 - ***Tardy Reasons:** Optional. Select the Tardy Reasons type (*Excused, Unexcused*). When selected, all tardy reasons matching the selected type will be checked below. Alternately, users may check each individual tardy reason code to be included in the count. Use *Ctrl+click* or *Shift+click* to select multiple reasons. If no Tardy Reasons are selected, all Tardy Reasons will be included in the count.
 - ***Number of Tardies:** Enter the threshold of tardies for which to generate letters. For example, to generate letters for students who have missed 5 tardies within the specified date range, enter a 5.
 - **Tardy Type:** Select the tardy type of *Daily, Across All Periods* (tardies in any period) or *In A Single Period* (tardies occur in the same period).
- Click **Execute**.
- Letters will be generated for students who have met the specified criteria.

Printing Discipline Letters

- Go to **Discipline | Reports | Discipline Letters** or to **Reports | Discipline Letters**.

Discipline Letters

Criteria

Student Filter: [Dropdown]

*Start Date: 01/04/2010 [Calendar Icon] *End Date: 01/08/2010 [Calendar Icon]

Infractions: [List Box]

*Letter: Suspension Letter [Dropdown]

*Default ID for Student Number Merge Field: Student Number [Dropdown]

*Order By: Last Name [Dropdown]

Dispositions: [List Box]

Demerits Range

Include Demerits Range

*High Value: 100 [Input Field]

*Low Value: 0 [Input Field]

Include

Infractions/Dispositions Description

[Execute] [Close]

- **Student Filter:** Discipline letters will be generated for students who have met certain criteria for discipline records. To check a subset of students, select the appropriate filter. To check all students, leave the *Student Filter* blank.
- ***Start/End Date:** Enter the *Start Date* and *End Date* range.
- **Infractions:** Select the desired *Infractions* to include. For example, to generate letters only for students who committed burglary infractions during the specified date range, select **Burglary**. Use *Ctrl+click* or *Shift+click* to select multiple infractions. If no infractions are selected, letters will be generated for all students with any infractions within the specified date range.
- **Dispositions:** Select the desired *Dispositions* to include. For example, to generate letters only for students who received detention during the specified date range, select **Detention**. Use *Ctrl+click* or *Shift+click* to select multiple dispositions. If no dispositions are selected, letters will be generated for all students with any dispositions within the specified date range.
- ***Letter:** Select the *Letter* from the drop-list.
- ***Default ID for Student Number Merge Field:** Select the *Default ID* to print. This ID will print only if the *StudentNumber* merge tag was added when the letter was created. If the *StudentNumber* tag was not added to the letter, no ID will print on the letter.
- ***Order By:** Select to order by *Grade Level*, *Last Name*, *Student Number* or *Zip Code*.
- **Demerits Range:** To print letters for only those records with demerits within a specified date range, check *Include Demerit Range* and enter the *High* and *Low Value*. Only letters with demerits within that range will be printed.
- **Infractions/Dispositions Description:** To include the Infraction/Disposition description within the letter and not just the code such as *DET* for detention, check to include *Infraction/Disposition Description*.
- Click **Execute**.

Printing Student Letters

- Go to **Students | Reports | Student Letters** or to **Reports | Student Letters**.

- **Student Filter:** Select the desired filter of students. To generate letters for all students, leave the *Student Filter* blank.
- **Terms:** If the *StudentSchedule* merge tag was used when creating the letter, select which term to be included. To include the complete schedule, use *Ctrl+click* or *Shift+click* to select all terms.
- ***Letter:** Select the *Letter* to be generated.

- ***Default ID for Student Number Merge Field:** Select the *Default ID* to print. This ID will print only if the *StudentNumber* merge tag was added when the letter was created. If the *StudentNumber* tag was not added to the letter, no ID will print on the letter.
- ***Order By:** Select to order by *Grade Level*, *Last Name*, *Student Number* or *Zip Code*.
- **Include:** Check to include student's current fee balance on the letter.
- Click **Execute**.

Generating Letter for Single Student

To manually generate a single letter for a student, access one of the following:

- **Students | Student Maintenance:** Search for and select to **View** a student. Select the **Student Letter** link under the *Reports* menu.
- **STUDENTS | STUDENT MAINTENANCE:** Search for and select to **View** a student. Click **Discipline** under the *Manage* menu on the left. Click the **Discipline Letter** link.
- **Students | Student Maintenance:** Search for and select to **View** a student. Click **Attendance** under the *Manage* menu on the left. Click the **Attendance Letter** link.

Viewing Sent Student Letters

When a letter is sent to a student, a record is saved to their file. To view a student's history, perform the following steps:

- Go to **Students | Student Maintenance**.
- Search for and select to **View** the student.
- Click the **Letters** link under the *Manage* menu on the left.

<input type="checkbox"/>	Letter	Type	Date
<input type="checkbox"/>	NewStudent	Student	08/09/2009
<input type="checkbox"/>	5 Unexcused Daily Absences	Attendance	08/24/2009

- A list of previously sent letters will display, along with the letter name, type and date sent.
- To view a letter, click the name of the letter that appears as a blue link.

Note: When a letter is sent to the student, the data elements of the letter are saved. However, an actual capture of the letter is not saved. When the letter name is clicked to view a previously sent letter, the student data elements are re-merged with the letter that was created under **System Preferences | Setup | Letters**. Therefore, it is strongly recommended that users do NOT delete a letter once it has been sent to a student. For example: If a 3-day attendance letter is sent and then a new format is uploaded, the next letter may not re-merge exactly the same way. If a letter is deleted, it may not be re-merged and opened or saved.