

# Introduction to Standard Letters and Reporting (SRLs)

*How to build and use SRLs*

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<http://www.brad.ac.uk/admin/SAINT/traindocs.php>

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## 1. The SRL Screen

The SRL screen can be used for three purposes:

1. Using an existing SRL with no need to release
2. Releasing and using an existing SRL
3. Creating an SRL

The SRL screen is shown in figure 1a below

Figure 1a – the SRL screen

### 1.1 Field Names and Definitions

The following table is a list of field names on the SRL screen, along with what the field is for and any possible options for that field.

Field Name	Definition
Letter Group	Each screen forms part of a group named Letter Group – you need to ascertain which Letter Group you need before you begin your SRL
Letter Code	The key field that identifies your letter/report – prefix with your Departmental code
Short Name	Abbreviated name of letter/report.
Letter Name	Longer description of letter/report is used for.
Version Number	Optional – you may want use it to indicate that you have edited the letter (e.g. for a new academic year)

Field Name	Definition
Letter Type	<p><b>LETTER</b> – a normal printable letter</p> <p><b>REPORT</b> – a listing of data for reporting purposes</p> <p><b>MULTI-COLUMN</b> – a multi-column report (used for labels)</p> <p><b>EMAIL</b> – for bulk emails to retrieved sets of students</p> <p><b>TEXT FILE</b> – for export files, etc.</p> <p><b>HTML DOCUMENT</b> – for publishing on the World Wide Web</p> <p><b>INCLUDED TEXT</b> – can be used to include an SRL in a section of another SRL which is not necessarily valid for the letter group</p> <p><b>WEB REPORT/LETTER</b> - used for generating letters via the web</p> <p><b>PORTAL INTRAY MESSAGE</b> – message to be delivered to a user's portal intray (E-Vision)</p> <p><b>SMS MESSAGE</b> - an SMS text message to be delivered to mobile phones</p>
Archive Letter	<p><b>NO ARCHIVE</b> – when the letter is generated, no record will be kept that it has been run</p> <p><b>ARCHIVE</b> – when the letter is generated, a full record will be kept (per student), including the letter text</p> <p><b>SUMMARY</b> - when the letter is generated, a summary record will be kept (per student), but not including the letter text</p>
Duplicates?	<p><b>NOT ALLOWED</b> – letter may be generated only once per student</p> <p><b>YES (ALLOWED)</b> - letter may be generated any number of times per student</p> <p><b>ASK</b> - letter may be generated any number of times per student, but the user will be prompted for confirmation on second and all subsequent generations</p> <p><b>OVERWRITE</b> - letter may be generated any number of times per student, but each generation will overwrite the previous record</p>
Description	Free-form field for describing purpose of Letter/report
Max Recs	User can set maximum number of records to be run – not normally used
Publicity Material?	Tick if to be used by Marketing in publications
Special Reqs?	Not normally used
Include Deceased?	Usually only used for certain reports

<b>Field Name</b>	<b>Definition</b>
Run Level	Minimum security clearance required to run this letter, e.g. user must have a status of 60 or above if Read Level is set to 60 (most users are have a clearance of 30). <b>DO NOT ENTER NUMBER FOR NORMAL LETTERS/EMAILS/SMS/REPORTS</b>
Owner	May be used to attach the letter to a particular SAINT user
Department	May be used to attach the letter to a particular University department
Faculty	May be used to attach the letter to a particular University school

## 2. Using an existing SRL (release not needed)

In some cases, users in other departments have created SRLs and made them 'generic' – in other words there is nothing in the SRL that has their specific names, telephone numbers, modules or courses etc. These SRLs can be 'run' against any batch of students retrieved on a screen within the correct **LETTER GROUP**.

To use an existing SRL you need to know two things:

- The **LETTER GROUP** - this indicates what type of letter you are dealing with, based upon the merge fields it extracts from the database.

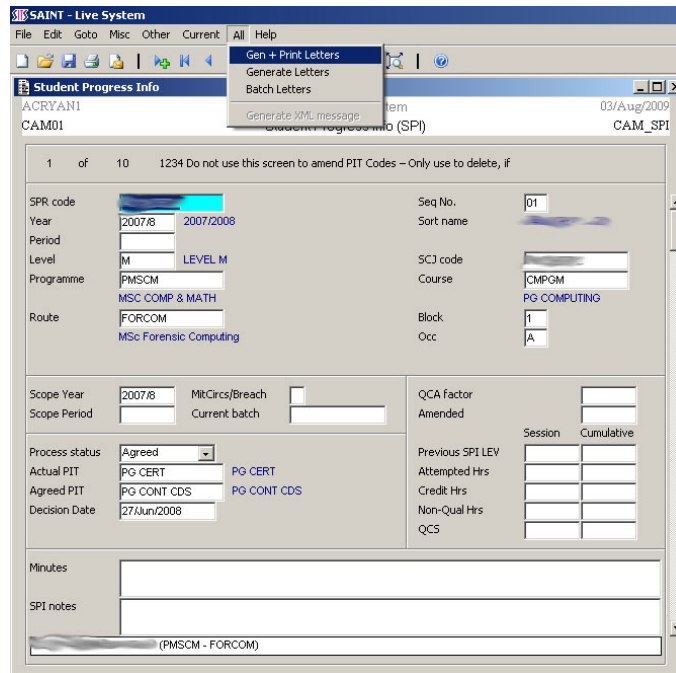
For example all Course Application Letters are in the **CAP** group, all Student Course Enrolment letters in the **SCE** group, and so on. This will in turn affect where the letter may be run from.

- The **LETTER CODE** – this is the identifier for the particular letter within the Letter Group. You can double-click in the Letter Code field for a list, and then select the one you want by double-clicking the relevant row. Alternatively, you can enter the Letter Group and select a **LETTER TYPE** you are wanting and retrieve. Use your page up/down keys to find the letter you wish to use.

Several template letters have been created which may be used as a basis for creating new letters – these begin with "XX".

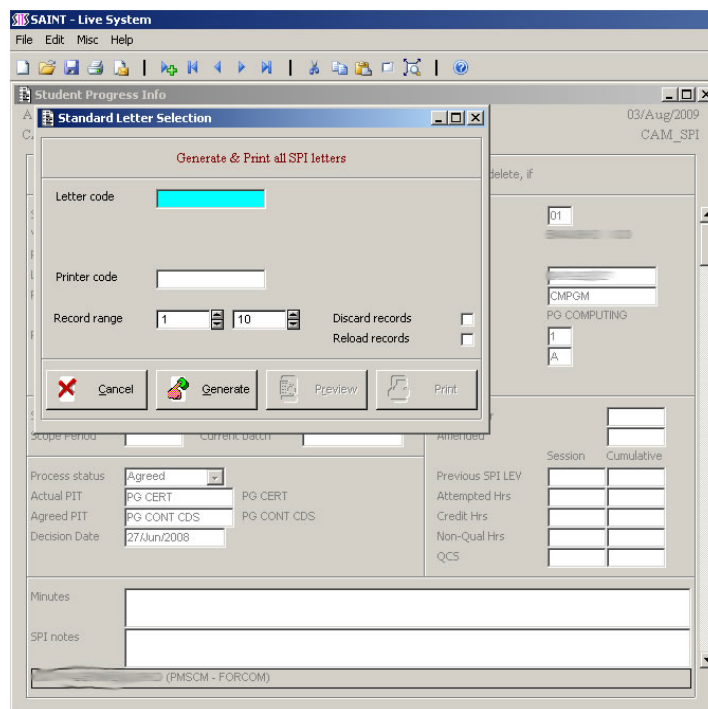
### 2.1 To find a Letter Group

If you are unsure about what group your letter should be in, think about the SAINT screen that you normally use to retrieve data. Go to that screen, retrieve one or more records then go to 'Current' or 'All' then 'Gen + Print Letters' on the menu bar (figure 2.1a shows an example using the SPI screen).



**Figure 2.1a** – to find the letter group, go to All -> Gen + Print Letters

The pop-up screen will indicate what group the letters will be drawn from – this indicates what group to use when setting up a letter in SRL (figure 2.1b).



**Figure 2.1b** – the Standard Letter Selection pop-up box shows the letter group – in this example, SPI

## 2.2 To run an existing SRL

Open the screen you want to run the SRL from and retrieve the appropriate records (figure 2.1a). Go to 'Current' (runs the SRL for the student currently displayed only) or 'All' (runs the SRL for all retrieved records), then 'Gen + Print Letters'. Enter the letter code in to the box - the printer code should be filled in automatically (figure 2.2a, below). Preview and/or print as required.

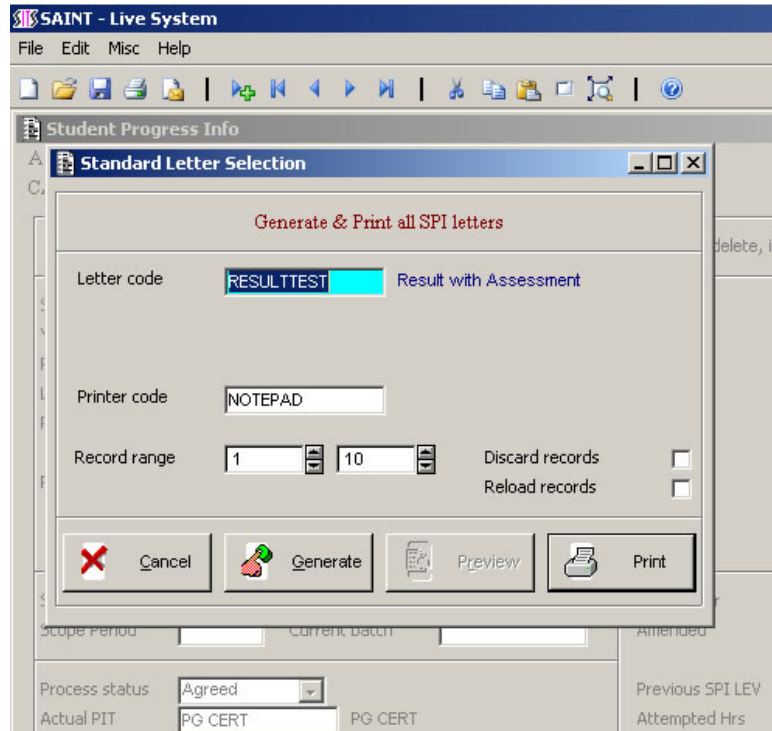
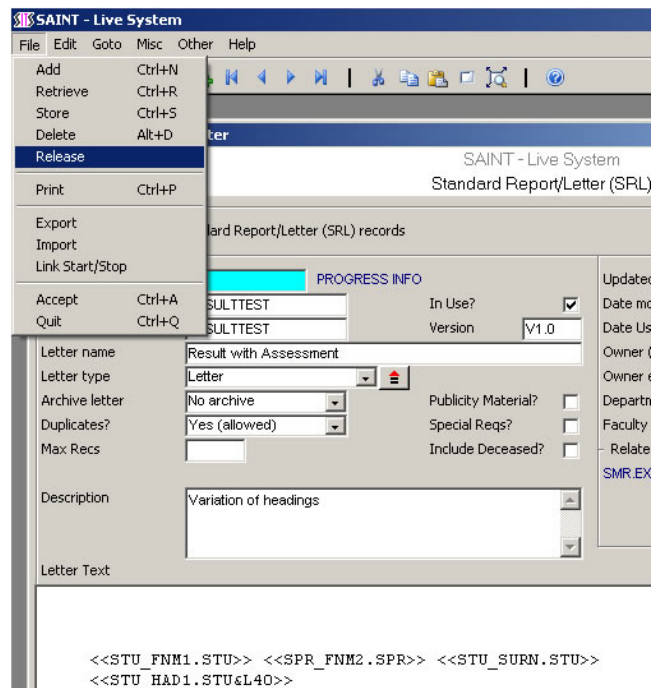


Figure 2.2a – to run an existing SRL, enter the letter code then preview/print and required.

### 3. Releasing an SRL

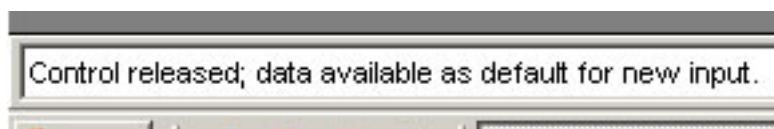
If another user has created an SRL that you wish to use as the basis for your new one, **do not** simply begin making changes and then store the results – this would overwrite someone else’s hard work and make you very unpopular!

Instead, you need to ‘release’ the SRL you wish to use and make your changes to the released version. To do this, open the SRL screen and enter the letter code you wish to alter. From the menu bar select ‘File’ then ‘Release’ (figure 3a)



**Figure 3a** – to release a letter in order to alter it, retrieve it in SRL then go to File → Release


At the bottom of your screen you should see the message: ‘Control released; data available as default for new input’ (figure 3b). This means a copy has been made of the existing record. Now enter a new name for the letter in the Letter Code field, with your departmental code, and store (F6).



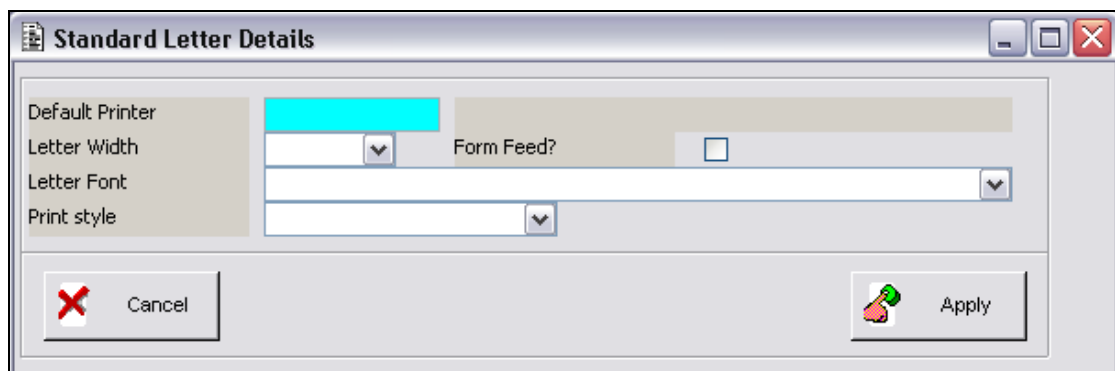
**Figure 3b** – message displayed when an SRL is released

You are now working with your own letter, and make as many changes as you like without affecting any other letters.

## 3.1 Formatting Screens for Different Letter Types

The 'Further Details' arrow  next to 'Letter Type' on the SRL screen opens another screen. Each letter type will open a different looking screen and requires different inputs, as detailed in the sections below.

### 3.1.1 For Letter Type 'Letter'



**Figure 3.1.1a** – further details box for the letter type 'Letter'

Double click in the **Default Printer** field and a list of printers will appear – double click on the one you wish to use

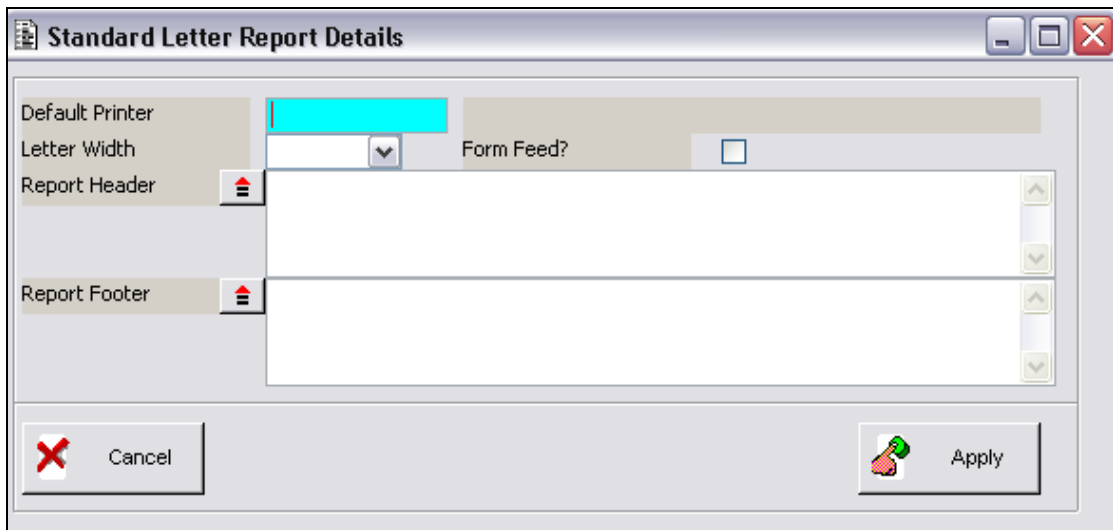
Drop down box for **Letter Width** – as a guide: 080 for A4 portrait; 132 for A4 landscape

**Form Feed?** – tick box if using an A4 printer

**Letter Font** – Use drop down menu to pick the font you wish eg Arial 12. Please note that some of the fonts are italic or bold

**Print Style** – can be left blank or pick Print Style from drop down menu

### 3.1.2 For Letter Type 'Report'



**Figure 3.1.2a** – further details box for the letter type 'Report'

Double click in the **Default Printer** field and a list of printers will appear – double click on the one you wish to use

Drop down box for **Letter Width** – as a guide: 080 for A4 portrait; 132 for A4 landscape

**Form Feed?** – tick box if using an A4 printer

**Report Header/Footer** – details can be added (insert Tabs using Cut & Paste rather than <TAB> key)

### 3.1.3 For Letter Type 'Multi-column' (used for labels)

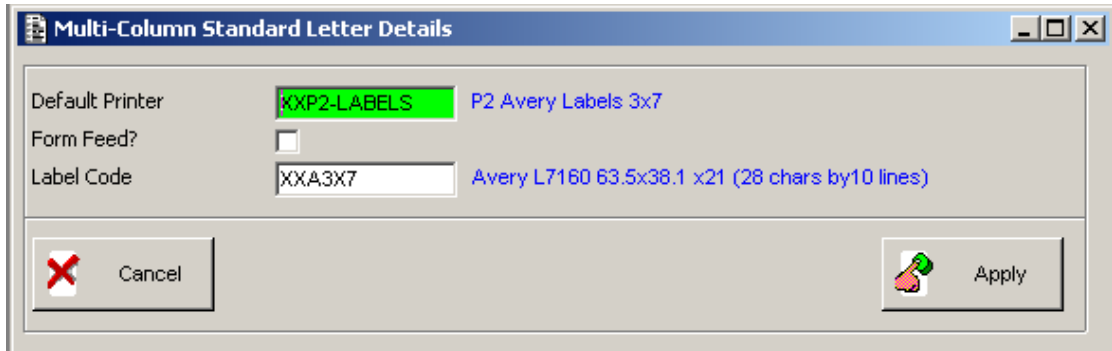


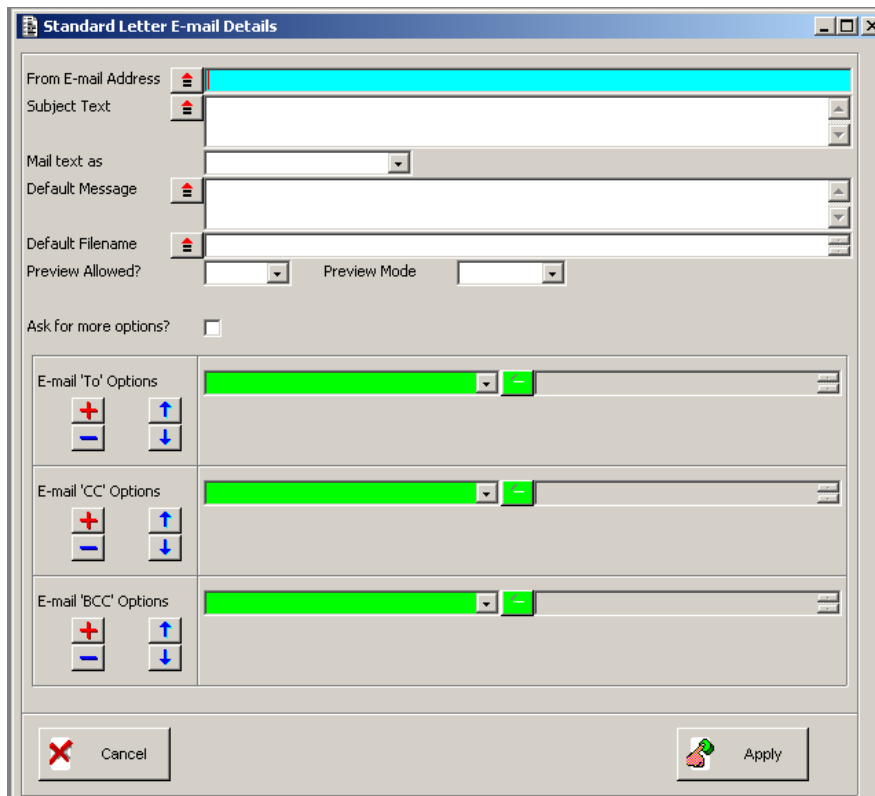
Figure 3.1.3a – further details box for the letter type 'Letter'

Double click in the **Default Printer** field and a list of label codes will appear – double click on the one you wish to use

**Form Feed?** – tick box if using an A4 printer

**Label Code** – double click in the field and pick the label code you wish to use

### 3.1.4 For Letter Type 'E-mail'



**Figure 3.1.4a** – further details box for the letter type ‘E-mail’

**Preview Allowed?** is a good one to say yes to when either sending an email or SMS. Also alter **Preview Mode** to view/edit

### 3.1.5 For Letter Type ‘Text File’

**Figure 3.1.5a** – further details box for the letter type ‘Text File’

### 3.1.6 For Letter Type ‘SMS Message’

**Figure 3.1.6a** – further details box for the letter type ‘SMS Message’

## 3.2 Letter Text Box

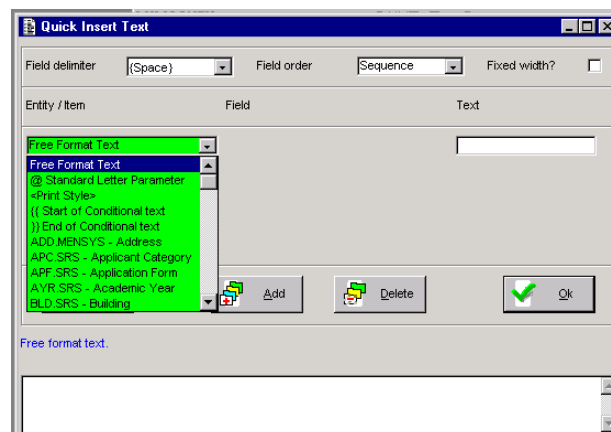
The ‘Letter Text’ on the SRL screen may be used in a number of ways:

- text may be overwritten, deleted, cut, copied and pasted as normal (e.g. you may want to copy the text of an existing Word document and paste it into your SRL letter).
- you can also open other SRL letters, and copy merge fields (e.g. student’s name and address) to the clipboard for subsequent pasting into your own letter – use Edit → Copy (or Ctrl & C) and Edit → Paste (Ctrl & V).

### 3.2.1 To enter a new merge field

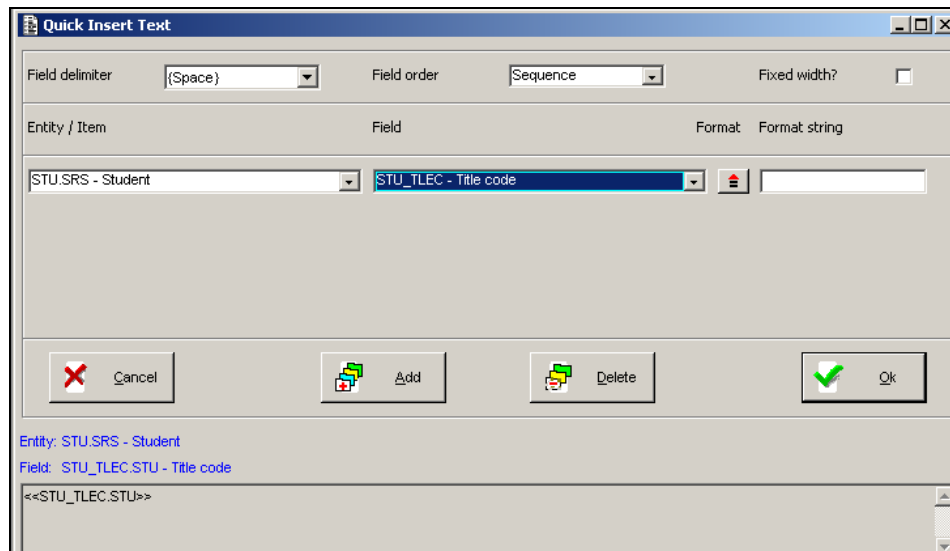
Place the cursor in the text area where you want the field to be, and from the menu select ‘Other’ then ‘Quick Insert’.

The **Entity/Item** drop-down box gives you a list of database tables to select from (figure 3.2.1a)




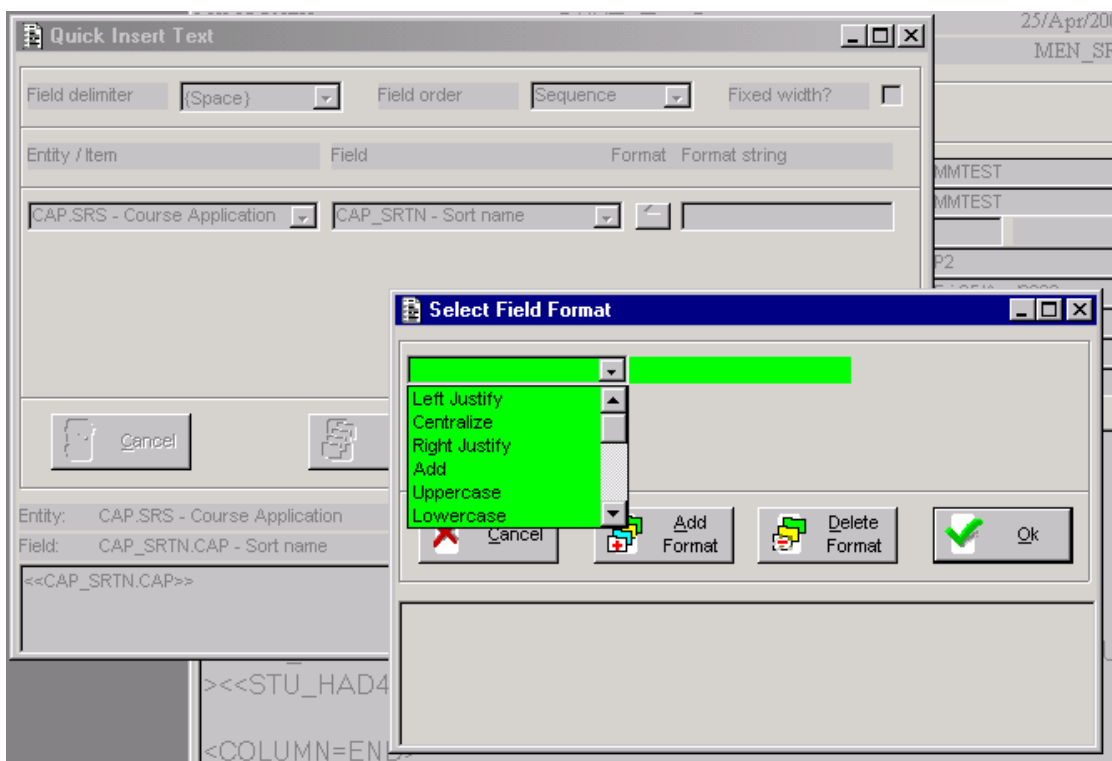
**Figure 3.2.1a** – the Entity/Item drop down box displays a list of database tables

Having chosen a table, the **Field** drop-down box gives you a list of all the fields in your chosen table (figure 3.2.1b).



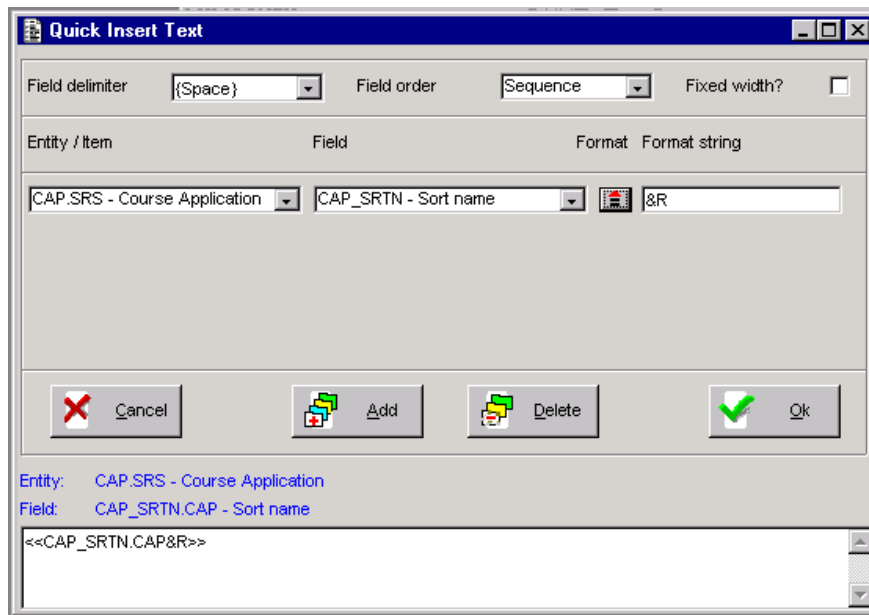
**Figure 3.2.1b** – the Field drop down box displays a list of available fields in your selected table

The 'Format' button  pops up a screen to allow you to apply formatting to your merge field (figure 3.2.1c)



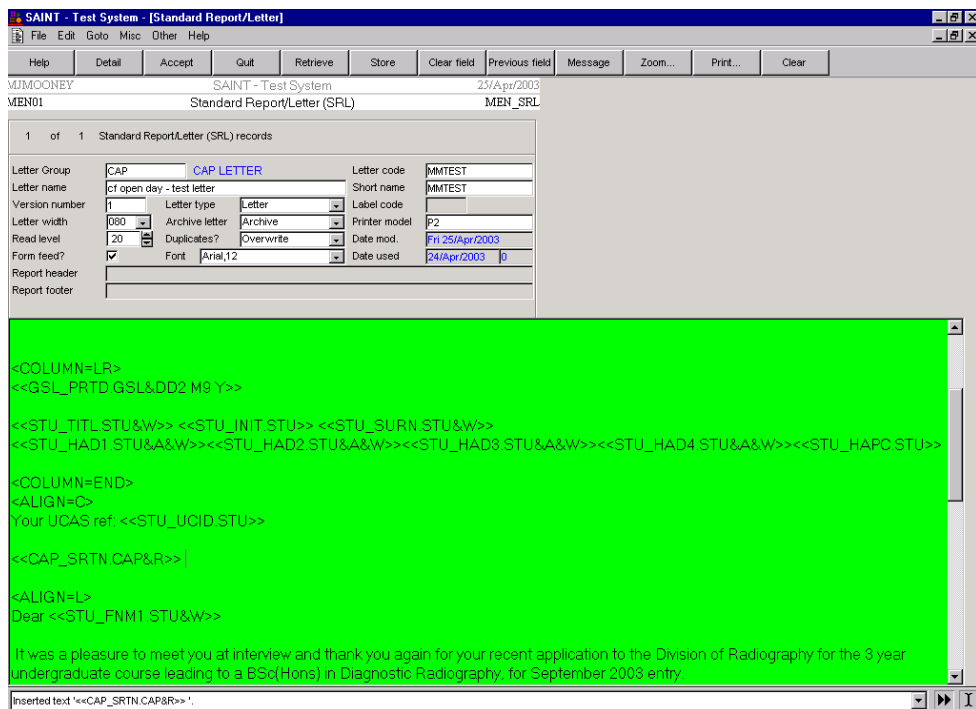
**Figure 3.2.1c** – the format button allows you to format your selected field

Your merge field is now displayed in the 'Quick Insert Text' box (figure 3.2.1d).



**Figure 3.2.1d** – the selected merge field and any formatting is now shown

Clicking “OK” will take you back to the main SRL screen, where your new field will have been added (figure 3.2.1e)



**Figure 3.2.1e** – Text box with new merge field inserted

When you’ve finished amending your letter – remember to STORE (F6)!

### 3.3 Generating Letters

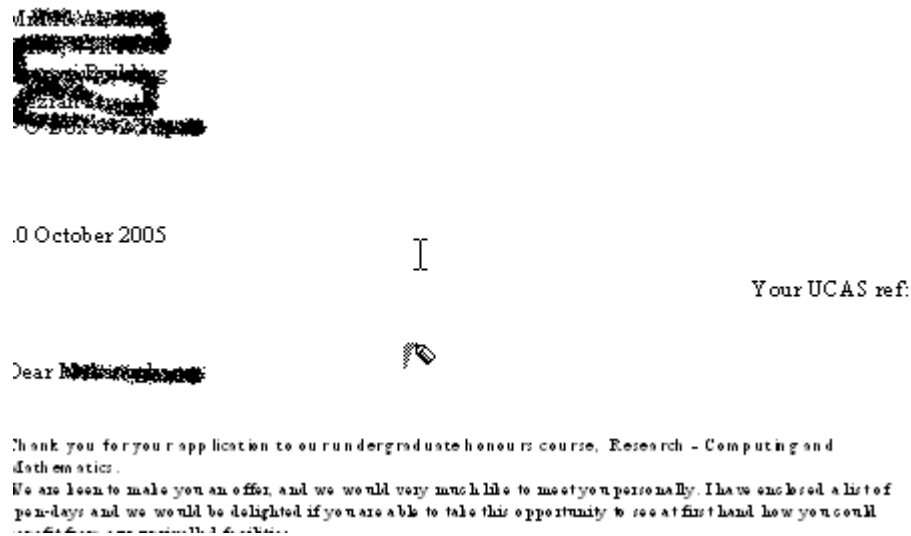
To test your letter, go to the appropriate screen (we're using ACD in this example) and retrieve your records as required (figure 3.3a)

**Figure 3.3a** – screen with retrieved records

To generate a letter for a single student:

- Make sure the correct student is currently displayed on the screen
- Go to **Current** → **Gen + Print Letters**
- Enter your Letter code (figure 3.3b) and press 'Preview' to see what your letter will look like (figure 3.3c)

**Figure 3.3b** – Enter letter code and press ‘Preview’



**Figure 3.3c** – a preview of the letter will be displayed on screen

Please note: If you have created your new letter in the LIVE database, remember that running it – even for a ‘test’ – will record that it has been generated for those students you have retrieved. To avoid this, while testing, set the ‘Archive Letter’ field in SRL to ‘No Archive’. When you are happy with the results, change if necessary.

The default setting is NO ARCHIVE - use this unless you really need to keep a history of letters sent.

If you need some audit trail – SUMMARY is a good option – it uses less space and shows the letter type sent and the UB number but not the letter text.

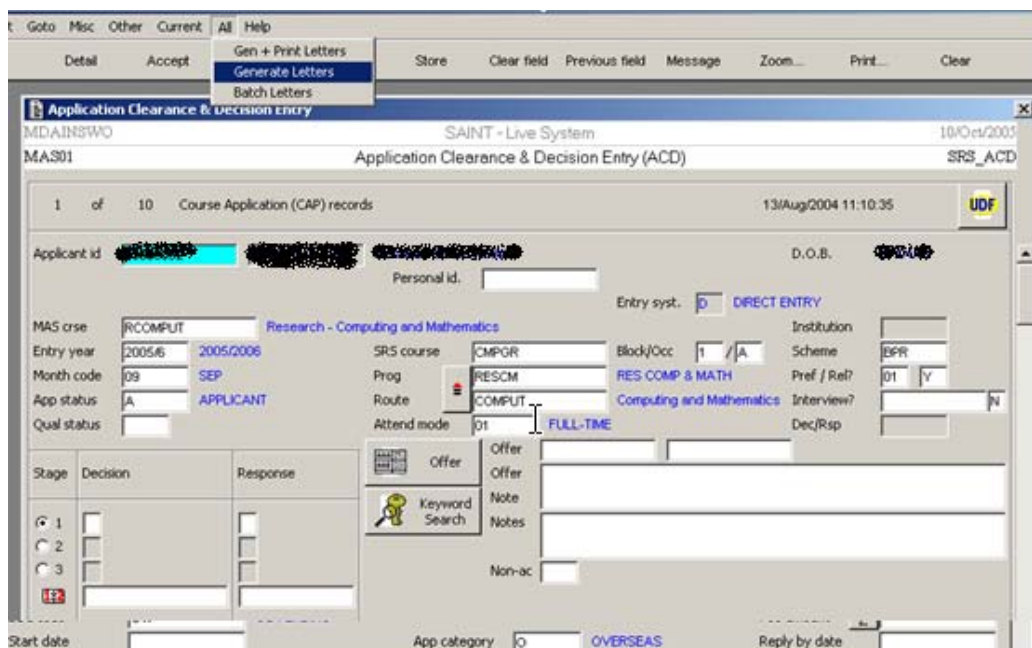
ARCHIVE has the same as above but WITH the letter text as well.

### 3.4 Amending a Single Letter

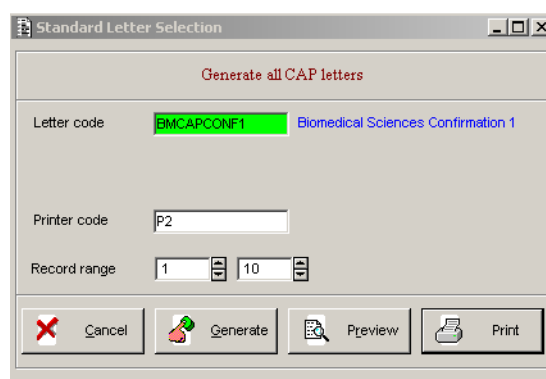
There will be times when, out of a group of students chosen, you will need to amend the wording slightly from the SRL template.

To do this you can use the **GSL (Generated Standard Letters)** and **PGL (Print Generated Letters)** screens.

- RETRIEVE your students in the appropriate screen
- Go to **All** → **Generate Letters** note: NOT Generate+ Print! (figure 3.4a)
- Select the letter template you want to use
- Instead of pressing the 'Print' button press 'Generate' (figure 3.4b)



**Figure 3.4a** – when amending a single letter, use Generate letters not Gen + Print Letters



**Figure 3.4b** – click 'Generate'

- From the retrieved students – make a note of the UB number(s) of the students needing the amended letters
  - Exit the screen
- 
- Go to GSL screen – enter Letter Group (e.g. CAP) and the SRL used (e.g. MMTEST2) then retrieve/F5 (figure 3.4c)

**Figure 3.4c** – retrieving records in the GSL screen

- Check how many records (i.e. generated letters) exist. If there is more than one (e.g. 1 of 3) you need to ensure you select the correct (most recent) record - use the scroll bar at the right of the screen, or the <Page Down> key.
- Retrieve/F5 again, to make sure you are working with only the correct record (message at top of screen will change to “1 of 1”).
- To amend the wording of the letter, click in the Letter Text box at the bottom of the screen and scroll down to wording (figure 3.4d)
- Amend, add, and delete wording, as required.
- Store/F6 the record.
- Exit the **GSL** screen
- To print this letter go to screen **PGL (Print Generated Letters)** (figure 3.4e)
- Your amended letter should print out. Sometimes the system will print out more than one so check the correct one has appeared!

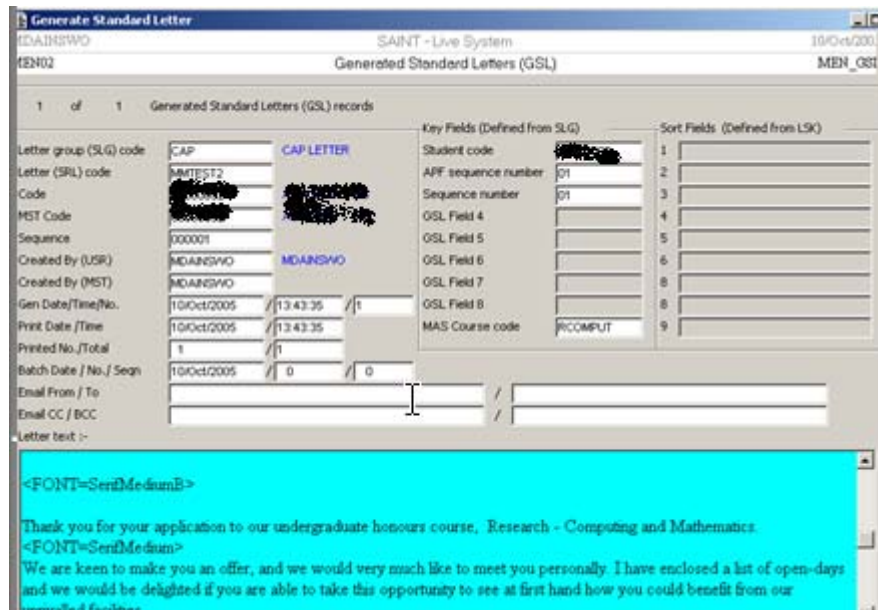


Figure 3.4d – amending the text of a single letter in GSL

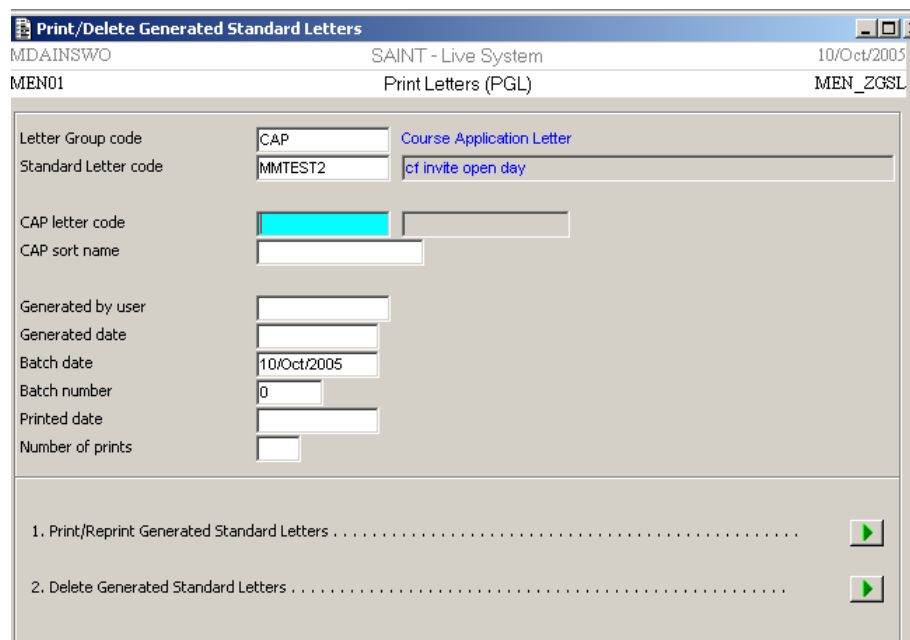


Figure 3.4e – use PGL to print the amended letter

## 4. Handy Tips for SRLs

### 4.1 Manual Formatting

To save time in formatting, you can manually add certain formatting in:

- Adding &W to a field e.g. <<STU\_FNM1.STU&W>> will put name in TITLE CASE
- Adding &U will put name in CAPITALS e.g. <<STU\_FNM1.STU&U>>
- Adding &V will put name in LOWERCASE e.g. <<STU\_FNM1.STU&V>>

For Address labels:

- &A in **ALL** address fields e.g. <<STU\_AD1&A>> will ensure there are no line gaps in the address
- <<STU\_AD1&A&W>> will put address in TITLE CASE and no line gaps. This can be used on all address lines but NOT on postcode field

Make sure there are no spaces between the address lines when using &A, otherwise the address indents.

### 4.2 Formfeed

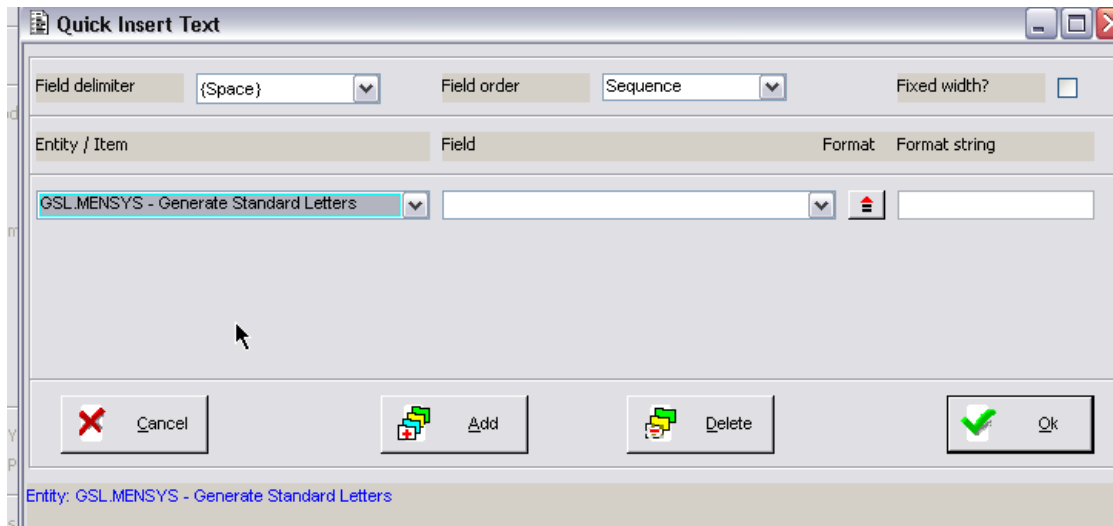
Formfeed will put page breaks in to stop student information splitting over pages

<FORMFEED>=nn

This function will look at the amount of records retrieved and if more than specified number – will move ALL those records to the next page e.g.<FORMFEED=10> placed at the beginning of the letter text will tell SAINT to look at each record retrieval and if, for a single student, there are more than 10 lines of information it will decide whether that can fit all on a page BEFORE the page break or move them all to the next page.

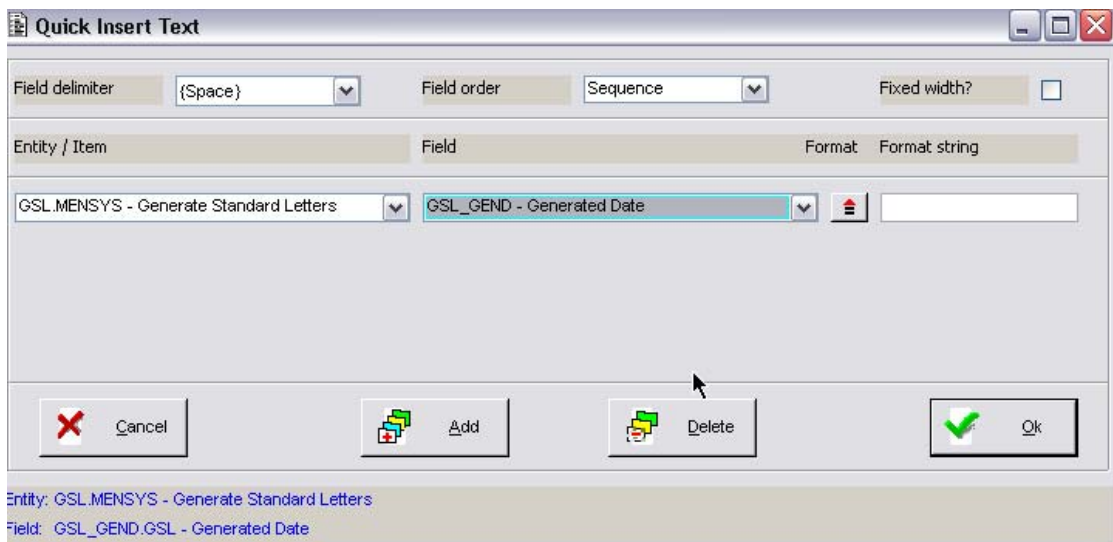
### 4.3 Automatically show current date

- On the SRL screen, put your cursor in the Letter Text area
- Go to Other → Quick Insert
- Select GSL MENSYS from Entity drop down menu (figure 4.3a)




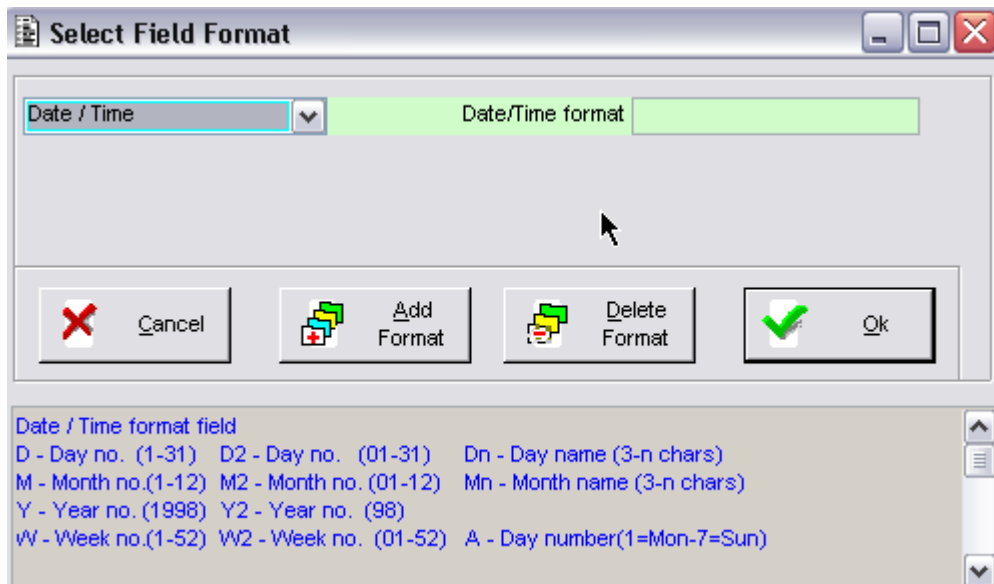
**Figure 4.3a** – Select GSL MENSYS on the Entity/Item menu

- From Field select 'GSL\_GEND - generated date' (figure 4.3b)



**Figure 4.3b** – Select GSL\_GEND in the field menu

Click on the format button  and select Date/Time from the first drop down box (figure 4.3c).



**Figure 4.3c** – select Date/Time from the drop-down box

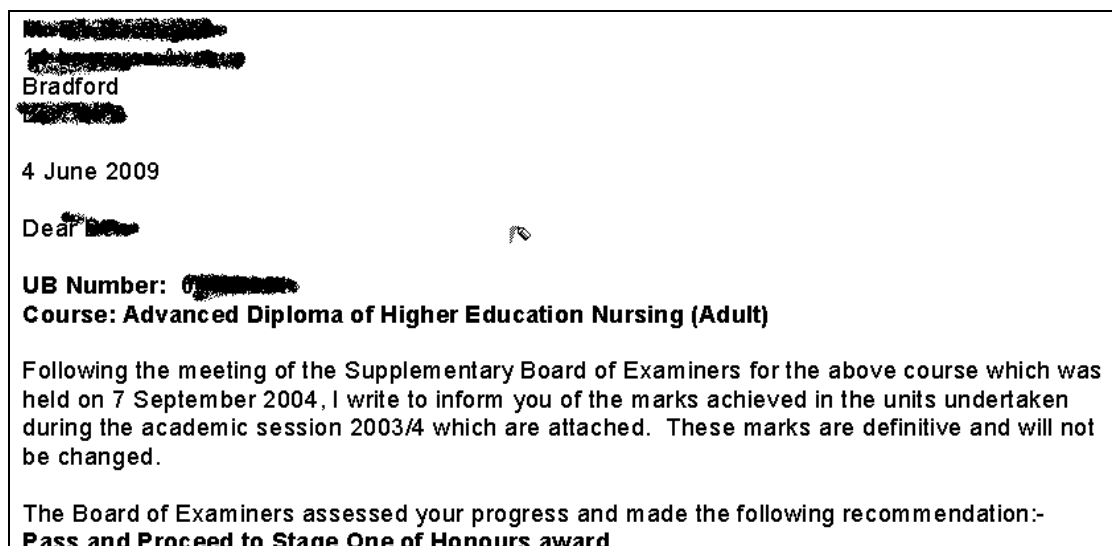
How to format the date is shown in the blue writing at the bottom of the screen. (n = number)

For example, to show the date as '2 February 2009' you would enter the following:

D M8 Y

## 4.4 Using 'bold' function

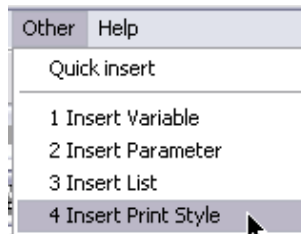
Figure 4.4a, below, shows a letter that has parts of the text in BOLD:



**Figure 4.4a** – letter with some text in bold

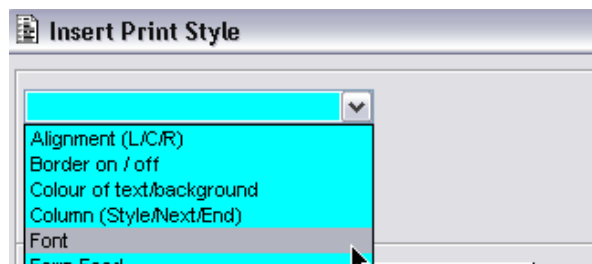
Please note that you can only make an entire sentence bold, not individual words within a sentence.

To use this function, ensure your cursor is within the Letter Text box on the SRL screen. The row **before** the text you wish to have in bold, enter the following code: <FONT: SansLargeB>. This can be done by going to Other → Insert Print Style (figure 4.4b).



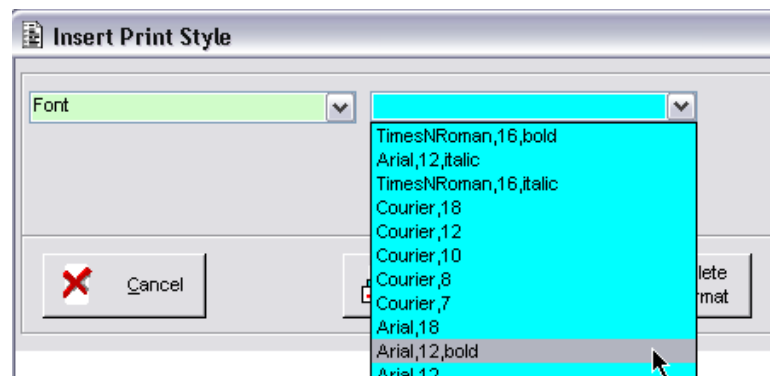
**Figure 4.4b** – Other → Insert Print Style

Choose FONT from drop down menu (figure 4.4c)



**Figure 4.4c** – choose Font from the drop down menu

Choose the font and size you want to be made bold (figure 4.4d)



**Figure 4.4d** – select font and size

This will ensure that anything below this line of code will be in BOLD

To stop this just add the code again on the line below but without the B (see figure 4.4e)

```

Dear <<STU_FUSD.STU&W>>

<FONT=SansLargeB>
UB Number: <<STU_CODE.STU>>
Course: <<ROU_NAME.ROU>>

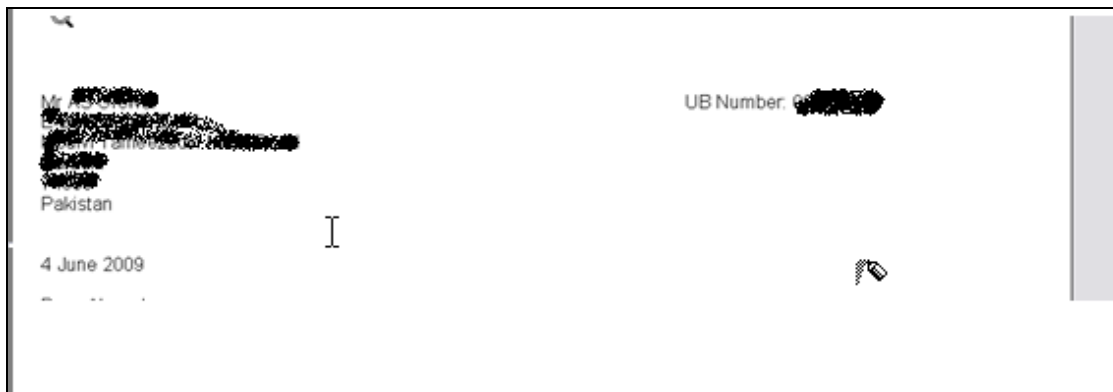
<FONT=SansLarge>

```

**Figure 4.4e** – How to begin and end bold formatting within a letter

## 4.5 Alignment

This can be helpful when having the name and address on one side of the letter and the student number on the other side of the letter (figure 4.5a)



**Figure 4.5a** – letter with text aligned in columns

The code to do this is below:

```
<COLUMN=LL>
```

```
<<STU_TITL.STU&W>> <<STU_INIT.STU>> <<STU_SURN.STU&W>>
```

```
<<STU_CAD1.STU&W&A>><<STU_CAD2.STU&W&A>><<STU_CAD3.STU&W&A>>
><<STU_CAD4.STU&W&A>><<STU_CAD5.STU&W&A>><<STU_CAPC.STU>>
```

```
<COLUMN=NEXT>
```

```
UB Number: <<STU_CODE.STU>>
```

```
<COLUMN=END>
```

```
<<GSL_GEND&DD M9 Y>>
```

- <COLUMN=LL> puts any following lines on the left hand side of the letter

- <COLUMN=NEXT> this code states that following lines will appear in another column in the letter, in the example above it moves the UB Number to the right hand side of the letter
- <COLUMN=END> this code stops the information being printed in columns and reverts to a normal letter as typed into the LETTER TEXT of the SRL

## 4.6 Generic letters/email/SMS

In the SRL table there should be several letters/emails/SMS texts set up so that anyone across the university can use them.

These types of SRL just produce basic information e.g. UB Number, student name etc

The SRLs differ from others in that they have no body text – they have a prompt which pops up and allows you to enter whatever you wish.

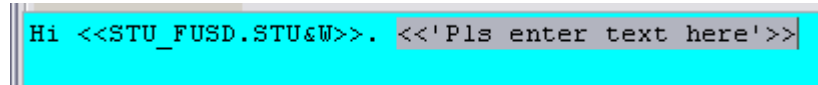
Before writing your own, check whether there is a generic SRL available (double check in the Letter Text and formatting to ensure someone hasn't put their own personal information there!). If one is available, simply retrieve your own students and use this SRL.

If not, set one up for yourself using the information earlier in this document. After the greeting you enter:

```
<<'Please enter text here'>>
```

Once you run the SRL it will prompt you to enter text before sending the message/email/letter.

Figure 4.6a shows an example.



```
Hi <<STU_FUSD.STU&W>>. <<'Pls enter text here'>>
```

**Figure 4.6a** – example of a generic SRL

This particular example is from an SMS message and would come out as the following

*Hi (student's first name), (your message text here)*