

## Mail Merge & Communications

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## Creating a Mailmerge Letter Template

In Integris G2, it is now possible to upload Mail Merge letter templates. This will allow you to produce letters straight out of G2, making mail merging much easier than before.

You will first need to create a template letter in Microsoft Word, inserting the applicable Mail Merge Tabs where necessary. See example Letter below. (Appendix A on Pg 12 shows a list of available Mail Merge Tags).

<addeename> <addeeaddressblock></addeeaddressblock></addeename>
Dear <addeesalutation> We would like to take this opportunity to welcome your <son daughter=""> to our school, we hope that <firstname> will be very happy with us. Should you or yout <son daughter=""> have any concerns at all whilst <he she=""> is with us please feel free to come a talk to me at any time. Whilst writing we would just like to check that the basic information we have on our records is accurate, therefore please check the details below carefully and advise us of any errors. First Name <firstname> Second Name <secondname> Preferred Name <knownname></knownname></secondname></firstname></he></son></firstname></son></addeesalutation>
Address <stuaddressblock>         Date of Birth       <dob>         For your information, <knownname> has been placed in Year <year>, Class &lt;<class>, <his her=""> teacher will be <tutor1>.         Yours sincerely       Headteacher</tutor1></his></class></year></knownname></dob></stuaddressblock>

Once you have finished your template letter, you will need to save it as an **.rtf** file.

To do this, go to **<u>File</u>** and **Save** <u>A</u>s...



...Name your letter, change the format to **Rich Text Format (\*..rtf)** and click **Save** ...

iave As							? 🔀
Save in:	📋 My Docur	nents	<ul><li>✓ ◊</li></ul>	- 🔰   🔇	, X 🖆 [	🏥 🔻 To	ioļs 🕶
My Recent Documents Desktop	Cache Cache Common Cache	: :d Files ocs cs					
My Computer	File <u>n</u> ame:	Welcome Letter.rtf				~	Save
Places	Save as <u>t</u> ype:	Rich Text Format (**.rtr	)			~	Cancel



## Uploading a Letter Template to G2

Once you have saved your letter template in RTF format, you will be able to upload the letter into G2.

Go to System Management (1) > Preferences (2) > Letter Templates (3) > Edit (4)

Attendance	General Security Reports Sit	ling Management Evacuation Repo	ort Generation Letter Templates	
System Management	Next Student No.:	249	Next Staff No.:	22
Assessment	Next Admission No.:	264	Staff Auto No.:	Yes
Behaviour	Student Auto No.:	Yes	Town:	
Census	Default Gender:	Male	County:	
Reporting to Parents	Enable Email Notification in	Cover: Yes		
Cover	Postcode:			
Programme Managemen	Academic Year - Display	Format		
School Workforce Censu	JS Year/Year			
	(e.g. '2000/2001')			
	Program Management —			
User Management	Warn if Teaching Set Maxir	num Size is exceeded when alloo	cating students: No	
Preferences				
Access Logs				
	Click the	Upload buttor	n 🚺	
		Crioua Sattor		
F	Preferences			
F	Preferences General Security Reports Lett	er Templates 🕠		
F	Preferences General Security Reports Lett	er Templates 🜔		
F	Preferences General Security Reports Lett Template Descripti	er Templates 🜔		1
F	Preferences General Security Reports Lett Template Descripti	er Templates 🜔		I
F	Preferences General Security Reports Lett Template Descripti	er Templates 🔉 💍		I
F	Preferences General Security Reports Lett Template Descripti	er Templates O		I
	Preferences General Security Reports Lett Template Descripti	er Templates O		I
	Preferences General Security Reports Lett Template Descripti	er Templates O		
	Preferences General Security Reports Lett Template Descripti	er Templates		I
F	Preferences General Security Reports Lett Template Descripti	er Templates		I
	Preferences General Security Reports Lett Template Descripti click th	er Templates 💿 on e browse butto	on Q	
F	Preferences General Security Reports Lett Template Descripti click the Upload Template	er Templates 💿	on Q	
F	Preferences General Security Reports Lett Template Descripti click the Upload Template	er Templates 💿 on le browse butto	on Q	
	Preferences General Security Reports Lett Template Descripti click th Upload Template • Select a template file to u	er Templates	on Q	
F	Preferences General Security Reports Lett Template Descripti click the Upload Template • Select a template file to u • Enter a name and description	er Templates	on Q	
F	Preferences General Security Reports Lett Template Descripti click the Upload Template • Select a template file to u • Enter a name and descrip • Click on Upload to upload	er Templates O	on Q	
	Preferences General Security Reports Lett Template Descripti click the Upload Template • Select a template file to u • Enter a name and descrip • Click on Upload to upload	er Templates O	on Q	
	Preferences General Security Reports Lett Template Descripti click the Upload Template • Select a template file to u • Enter a name and descrip • Click on Upload to upload File Name:	er Templates	mQ	
F	Preferences General Security Reports Lett Template Descripti Current Descripti Descripti Descripti Descripti Current Descripti Description	er Templates	om Q	
F	Preferences General Security Reports Lett Template Descripti Current Descripti Upload Template  Select a template file to u Enter a name and descrip Click on Upload to upload File Name: Template Name: Description	er Templates	on Q	

...navigate to the letter template you have just created and click Open ...

...enter a **Template Name** and click **Upload**...



The letter has now been saved on your system for future use.



## Creating Individual Letters

In order to create an individual letter within G2, you will first need to search for the student you wish to create the letter for.

Go to **General (1)** > **Student Details (2) Quick Search** for the applicable Student (3) > click Communicate (4).

General     General     Administration     Attendance	Personal Personal Names Current V O	Communicat: Entitlement Enrolment Atten D Derowsing all students	e   Find   Add   Edit   Move To Former dans Additional Medical Groups Quick Search	r Roll   Print
System Management Assessment Behaviour	Nikolina Abdullah	ni (86) Year: Recept	tion Class: Pec A House: Not s	specified
<ul> <li>Census</li> <li>Reporting to Parents</li> <li>Cover</li> <li>Programme Management</li> </ul>	Gender: Date of Birth: Age: Teacher(s):	Female A 05 May 2006 5 Yrs Dr Brian Aldridge	ddress: 179, Christie Stret Wembley Norfolk MS22 8BP	
<ul> <li>Student Details</li> <li>Staff Details</li> <li>Groups</li> </ul>	Room: UPN: Exam No: ULN: Car Registration:	D123456706123	dministrative Area:	

#### Select Create a Letter and Next >>



Chose the Letter Template (1) you wish to use and select the appropriate Recipient (2). Then click Generate Letters (3).

Communicate	Options - Create Letter for Nil	colina Ab	dulla	ahi				
<ul> <li>Choose a Manageme</li> <li>Select one</li> </ul>	Template from the List (new Temp int > Preferences screen'). or more Recipients and click on (	olates can Generate I	be ac	dded v s	via the	'Syste	m	
Choose a Tem	plate:							
Template	Description						<u>^</u>	
Welcome Lette	r							
Select Recipi	ents:							
Name	Address	Relation	Res	Par	Email	Emrg	A 🖑 👘	
 Mr & Mrs Abdullahi	179, Christie Street, Wembley, Norfolk, MS22 8BP,	Parents	Yes	Yes	Yes	1		
Nikolina Abdullahi	179, Christie Street, Wembley, Norfolk, MS22 8BP,	Student					~	
Res-S	tudent resident Par-Parental Responsi	bility Mail-I	Family	Mail N	1arker	Emrg-En	nergency	
<< Back			Car	ncel	Ge	nerate l	etters	

The following box will appear ...

ile Dow	vnload
Do you	want to open or save this file?
	Name: Welcome LetterITunit00002011-06-06-15-04.rtf Type: Rich Text Format From: <b>redbridge.integrisg2.com</b>
	Open Save Cancel
2	While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

... Click **Open** to view the letter. Once opened, you can print and/or Save the letter in the same way you normally would within Microsoft Word.

## **Creating Multiple Letters**

In order to create a letter for multiple Students, you will first need to create a browse set of students using the **Find** function. E.g. To create a browse set for a year three trip letter, you would select year 3 within the **Find** area to select all year three students. These students will then be entered into a 'Browse Set' on the Student Details screen. (For more info on browse sets see Introduction to Browse Sets on pg 16 of this Document.)

Go to **General (1)** > **Student Details (2)** > **Find (3)** (in order to select the appropriate Students) > click **Communicate (4)**.



#### Select Create a Letter and Create Communications for all Students in the Browse Set then click Next >>



Chose the Letter Template (1) you wish to use and select the appropriate Recipient (2). Then click Generate Letters (3).



The following box will appear ...

ile Dow	nload
Do you	want to open or save this file?
	Name: Welcome LetterITunit00002011-06-06-15-04.rtf
	Type: Rich Text Format
	From: redbridge.integrisg2.com
	Open Save Cancel
2	While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

... Click **Open** to view the letters. Once opened, you can print and/or Save the letters in the same way you normally would within Microsoft Word.

## Sending Emails via G2

You can now send email communications to parents straight from G2. In order to use this function, Parents email addresses would need to be entered in the Family tab of **Student Details**.

To send an email, go to **General > Student Details >** use **Quick Search** to send emails for individual Students or create a **Browse Set** for multiple students, in the same way as you would to create a Mail Merge Letter (See pgs 6-9) **>** and click on **Communicate**.

Select **Create an Email** (and **Create Communications for all Students in the Browse Set** if using a Browse Set) and click **Next>>** ..

Ch Ch or	oose whether to generate letters (from a template), eMails or a CSV file. oose whether to create communications for all students in the current browse just for the currently selected student.	s
C	ck on Next to specify further options before generating the communication/fil	e.
0	Create a Letter	
۲	Create an eMail	
0	Produce a CSV file	
•	Create Communications for all students in the browse set	
0	Create Communications for the current student only	

Enter a **Subject (1)** and **Message** Text (Using Mail Merge Tags seen on pages 12-14) (2) Select the appropriate Recipient (3) > click **Generate Emails (4)** 

Enter details for Su	bject and Message Text, and a Reply to address	s (optional).					
Attach files if require	ed.						
Select one or more	Recepient and click on Generate eMails.						
Note that eMails will	I only be sent to contacts with a valid eMail Add	ress.					
Subject:							
Message Attachments							
Dear < Salutation >							
Dear Abaratations							
Bear a Balatadone							
Reply to address:		æ					
Reply to address:		@					
Reply to address: Select Recipients:	Email	Relation	Res	Par	Mail	Emrg	
Reply to address: Select Recipients:	Email anita.pirie@redbridge.gov.uk	Relation Parents	Res Yes	Par Yes	Mail Yes	Emrg 1	•
Reply to address: Select Recipients: Name Mr & Mr & Addullahi micolina Abdullahi	Email enita.pirie⊈redbridge.gov.uk ≺no email address>	Relation Parents Student	Res Yes	Par Yes	Mail Yes	Emrg 1	
Reply to address: Select Recipients: Mane Nr. & Nrs Abdullahi Micolina Abdullahi	Email anita.pirie⊋redbridge.gov.uk <no address="" email=""></no>	Relation Parents Student	Res Yes	Par Yes	Mail Yes	Emrg 1	=
Reply to address: Select Recipients: Mame Name Nr & Nrs Abdullahi	Email anta.pirie@redbridge.gov.uk <no address="" email=""></no>	Relation Parents Student	Res Yes	Par Yes	Mail Yes	Emrg 1	

Emails will now have been sent to parents of the selected students.

A box will appear confirming how many, if any, recipients the email could not be sent to due to there not being an Email address for that person.



...Click **OK** to close this box. You will then be left with a box which will allow you to view and/or print a list showing students/Contacts with and without email addresses.

CIICK	on the Print bu	tton to generate a printable	version of thi	s list.				
		···· ,						
ilter:	Show all Conta	ects 🗸						
Students	Show all Conta	cts with an Email address	Relation	Res	Par	Mail	Emrg	
Paul Morr	Show Contacts	without an Email address	Parents	Yes	Yes	Yes	1	10
	Morris							
Jasmeet Singh	Mr & Mrs Singh	<no address="" email=""></no>	Parents	Yes	Yes	Yes	1	
Matthew Pendletor	Mr & Mrs Pendleton	<no address="" email=""></no>	Parents	Yes	Yes	Yes	1	
								11

Once you have viewed/printed the list you can close the box by simply clicking 'Close'.

# Integris G2 Appendix A

Tag	Actual data source
<knownname></knownname>	STUDENT_MAIN.KNOWN_NAME
<preferredname></preferredname>	STUDENT_MAIN.KNOWN_NAME
<firstname></firstname>	STUDENT_MAIN.FIRST_NAME
<secondname></secondname>	STUDENT_MAIN.SECOND_NAME
<surname></surname>	STUDENT_MAIN.SURNAME
<legalsurname></legalsurname>	STUDENT_MAIN.LEGAL_SURNAME
<dob></dob>	STUDENT_MAIN.DATE_OF_BIRTH
<stugender></stugender>	STUDENT_MAIN.GENDER
<age></age>	Calculated from STUDENT_MAIN.DATE_OF_BIRTH based on current date
<year></year>	YEAR.NAME linked to STUDENT_MAIN.YEARGROUP_ID
<class></class>	CLASS.NAME linked to STUDENT_MAIN.CLASS_ID
<form></form>	CLASS.NAME linked to STUDENT_MAIN.CLASS_ID
<year class=""></year>	Combination of Year and Class as above
<year form=""></year>	Combination of Year and Class as above
<tutor1></tutor1>	STAFF_MAIN.TITLE, INITIALS & SURNAME for the STAFF_MAIN record linked to CLASS.STAFF_1_ID which is linked in turn to STUDENT_MAIN.CLASS_ID
<tutor2></tutor2>	STAFF_MAIN.TITLE, INITIALS & SURNAME for the STAFF_MAIN record linked to CLASS.STAFF_2_ID which is linked in turn to STUDENT_MAIN.CLASS_ID
<teacher1></teacher1>	STAFF_MAIN.TITLE, INITIALS & SURNAME for the STAFF_MAIN record linked to CLASS.STAFF_1_ID which is linked in turn to STUDENT_MAIN.CLASS_ID
<teacher2></teacher2>	STAFF_MAIN.TITLE, INITIALS & SURNAME for the STAFF_MAIN record linked to CLASS.STAFF_2_ID which is linked in turn to STUDENT_MAIN.CLASS_ID
<senstage></senstage>	SEN_STAGE.NAME linked to SEN_DETAILS linked to STUDENT_MAIN
<house></house>	HOUSE.NAME linked to STUDENT_MAIN.HOUSE_ID
<ethnicity></ethnicity>	ETHHNICITY.NAME linked to STUDENT_MAIN.ETHNICITY_ID
<indigenous status=""></indigenous>	ETHHNICITY.NAME linked to STUDENT_MAIN.ETHNICITY_ID
<religion></religion>	RELIGION.NAME linked to STUDENT_MAIN.RELIGION_ID
<mothertongue></mothertongue>	LANGUAGE.NAME linked to STUDENT_MAIN.MOTHER_TONGUE_LANG_ID

Tag	Actual data source
<prevsch></prevsch>	OTHER_SCHOOL.NAME linked to STUDENT_MAIN.PREVIOUS_SCHOOL_ID
<entrydate></entrydate>	STUDENT_MAIN.ENTRY_DATE
<destsch></destsch>	OTHER_SCHOOL.NAME linked to STUDENT_MAIN.DESTINATION_SCHOOL_ID
<leavedate></leavedate>	STUDENT_MAIN.LEAVE_DATE
<reasonforleaving></reasonforleaving>	STUDENT_MAIN.MOVEMENT_REASON_ID linke to MOVEMENT_REASON
<boarder></boarder>	STUDENT_MAIN.BOARDER
<boardertype></boardertype>	STUDENT_MAIN.BOARDER_TYPE_ID linked to BOARDER_TYPE
<attendtype></attendtype>	STUDENT_MAIN.ATTENDANCE_TYPE_ID linked to ATTENDANCE_TYPE
<otherschool></otherschool>	STUDENT_MAIN.OTHER_SCHOOL_ID linked to OTHER_SCHOOL
<reference></reference>	STUDENT_MAIN.REFERENCE
<upn></upn>	STUDENT_MAIN.UPN
<exam no.=""></exam>	STUDENT_MAIN.EXAM_NUMBER
<cc no.=""></cc>	STUDENT_MAIN.EXAM_NUMBER
<email></email>	STUDENT_MAIN.EMAIL
<phone1></phone1>	ADDRESS.PHONE_TEL1 linked to STUDENT_MAIN
<stuaddl1></stuaddl1>	ADDRESS.LINE1 for the ADDRESS record linked to STUDENT_MAIN
<stuaddl2></stuaddl2>	ADDRESS.LINE2 for the ADDRESS record linked to STUDENT_MAIN
<stuaddl3></stuaddl3>	ADDRESS.LINE3 for the ADDRESS record linked to STUDENT_MAIN
<stuaddl4></stuaddl4>	ADDRESS.LINE4 for the ADDRESS record linked to STUDENT_MAIN
<stuaddressline></stuaddressline>	ADDRESS.LINE1, LINE2, LINE3, LINE4, TOWN, COUNTY, POSTCODE & COUNTRY for the ADDRESS record linked to STUDENT_MAIN. Output as a single line with comma separation, ignoring blank fields.
<stuaddressblock></stuaddressblock>	ADDRESS.LINE1, LINE2, LINE3, LINE4, TOWN, COUNTY, POSTCODE & COUNTRY for the ADDRESS record linked to STUDENT_MAIN. Output separating each field by ascii character 13, ignoring blank fields.
<stuaddressshortblock></stuaddressshortblock>	ADDRESS.LINE1, LINE2, LINE3 and LINE4 for the ADDRESS record linked to STUDENT_MAIN. Output separating each field by ascii character 13, ignoring blank fields.
<stuaddtown></stuaddtown>	ADDRESS.TOWN for the ADDRESS record linked to STUDENT_MAIN
<stuaddcountystate></stuaddcountystate>	ADDRESS.COUNTY for the ADDRESS record linked to STUDENT_MAIN
<stuaddpostcode></stuaddpostcode>	ADDRESS.POSTCODE for the ADDRESS record linked to STUDENT_MAIN

Tag	Actual data source
<stuaddcountry></stuaddcountry>	ADDRESS.COUNTRY for the ADDRESS record linked to STUDENT_MAIN
<he she=""></he>	Dependent on STUDENT_MAIN.GENDER
<he she=""></he>	Dependent on STUDENT_MAIN.GENDER
<his her=""></his>	Dependent on STUDENT_MAIN.GENDER
<his her=""></his>	Dependent on STUDENT_MAIN.GENDER
<him her=""></him>	Dependent on STUDENT_MAIN.GENDER
<him her=""></him>	Dependent on STUDENT_MAIN.GENDER
<boy girl=""></boy>	Dependent on STUDENT_MAIN.GENDER
<male female=""></male>	Dependent on STUDENT_MAIN.GENDER
<boy girl=""></boy>	Dependent on STUDENT_MAIN.GENDER
<male female=""></male>	Dependent on STUDENT_MAIN.GENDER
<son daughter=""></son>	Dependent on STUDENT_MAIN.GENDER
<doctor></doctor>	MEDICAL_DETAILS.DOCTOR linked to STUDENT_MAIN
<practice></practice>	MEDICAL_PRACTICE.NAME linked to MEDICAL_DETAILS linked to STUDENT_MAIN
<practice address=""></practice>	ADDRESS fields linked to MEDICAL_PRACTICE RECORD (see above). Use the fields as in <stuaddressblock></stuaddressblock>
<practice tel1=""></practice>	ADDRESS.PHONE_TEL1 linked to the MEDICAL_PRACTICE record (see above)
<practice tel2=""></practice>	ADDRESS.PHONE_TEL2 linked to the MEDICAL_PRACTICE record (see above)
<practice fax=""></practice>	ADDRESS.PHONE_FAX linked to the MEDICAL_PRACTICE record (see above)
<addeename></addeename>	CONTACT.INITIALS & CONTACT.SURNAME
<addeeinitials></addeeinitials>	CONTACT.INITIALS
<addeefirstname></addeefirstname>	CONTACT.FIRST_NAME
<addeesurname></addeesurname>	CONTACT.SURNAME
<addeesalutation></addeesalutation>	CONTACT.SALUTATION (or CONTACT.TITLE, CONTACT.INITIALS & CONTACT.SURNAME if no salutation)
<addeetitle></addeetitle>	CONTACT.TITLE
<addeeaddl1></addeeaddl1>	ADDRESS.LINE1 for the ADDRESS record linked to CONTACT
<addeeaddl2></addeeaddl2>	ADDRESS.LINE2 for the ADDRESS record linked to CONTACT
<addeeaddl3></addeeaddl3>	ADDRESS.LINE3 for the ADDRESS record linked to CONTACT
<addeeaddl4></addeeaddl4>	ADDRESS.LINE4 for the ADDRESS record linked to CONTACT

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Tag	Actual data source
<addeeaddressline></addeeaddressline>	Address lines for the ADDRESS record linked to the CONTACT record - in same format as <stuaddressline></stuaddressline>
<addeeaddressblock></addeeaddressblock>	Address lines for the ADDRESS record linked to the CONTACT record - in same format as <stuaddressblock></stuaddressblock>
<addeeaddressshortblock></addeeaddressshortblock>	Address lines for the ADDRESS record linked to the CONTACT record - in same format as <stuaddressshortblock></stuaddressshortblock>
<addeeaddtown></addeeaddtown>	ADDRESS.TOWN for the ADDRESS record linked to the CONTACT record
<addeeaddcountystate></addeeaddcountystate>	ADDRESS.COUNTY for the ADDRESS record linked to the CONTACT record
<addeeaddpostcode></addeeaddpostcode>	ADDRESS.POSTCODE for the ADDRESS record linked to the CONTACT record
<addeeaddcountry></addeeaddcountry>	ADDRESS.COUNTRY for the ADDRESS record linked to the CONTACT record
<addeeresp></addeeresp>	RELATIONSHIP.PARENT_RESPONSIBILITY
<addeesr></addeesr>	RELATIONSHIP.STUDENT_RESIDENT
<addeerelation></addeerelation>	REALATIONSHIP_TYPE.NAME linked to RELATIONSHIP
<addeeemail></addeeemail>	CONTACT.EMAIL

## Introduction to Browse Sets

#### What is a 'Browse Set'?

If the criteria searched using the find tool matches more than one record, a list will appear in order for you to select one or more records to be viewed. If you wish to view just the one record, that chosen record will display in the work area. If, however you select multiple records to view, the records displayed in the work area will be displayed in what is known as a Browse Set.

## How can I tell whether I am viewing records in Normal or Browse Set <u>mode?</u>

When viewing records in normal mode the display will simply read "**Browsing all students**"

Personal	Communicate   Find   Add   Edit   Move To Former Roll   Print			
Personal Names Environment Environment University of Current Current Control C	Additional Medical Groups Movements O Quick Search Q			
Andrew Adams (84)	Year: 2 Class: 2A House: North			
	🖻 😭			
Gender: Male	Address: 65, Treetops Lane			

When viewing records in a Browse Set, the number of students in that particular set will be displayed to the right of the browse buttons (as shown below)...

Personal		Commur	nicate   Fir	nd   Add   E	Edit   Move	To Former R	oll   Print
Personal Name	entitlement Enrolment	Attendance Additional	Medical	Groups	Movements		
Current 🛛 🗸	🕽 🖸 🗘 (Browsing 10 selec	ted student(s))		Quick	Search		Q
Shahib Betchoo	(111)		Year: 1	Class: Re	ec A Hou	use: Not spe	ecified
(a)						(	) 🕕
Gender:	Male	Addres	s: 266.	Bald Circu	it		

#### Navigating a Browse Set

To navigate through the selected records in a Browse set, simply click the left and right navigation arrows



To exit the browse set simply click the<sup>0</sup>.

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