

Integris G2

Mail Merge & Communications

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Integrus G2

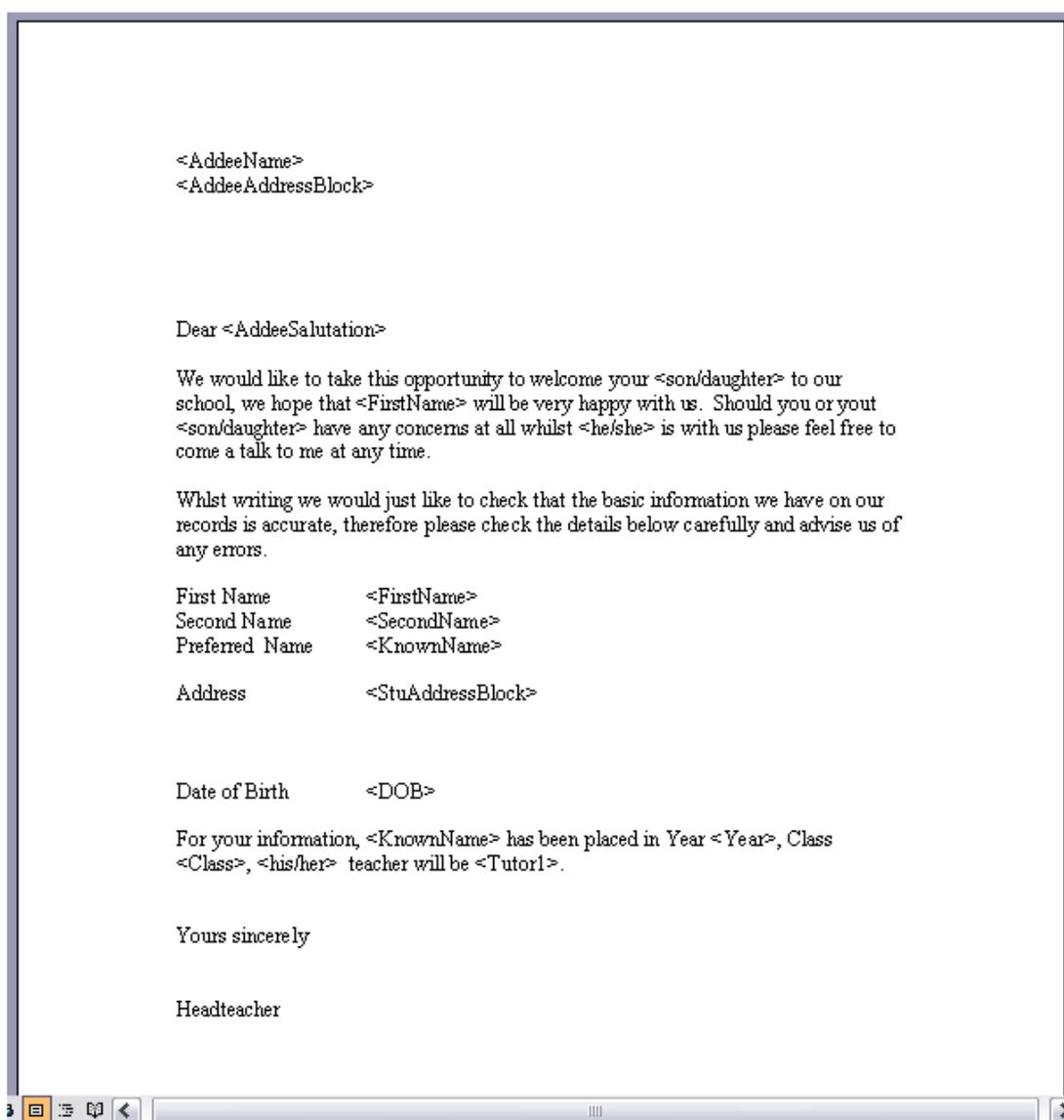
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Creating a Mailmerge Letter Template

In Integrus 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.

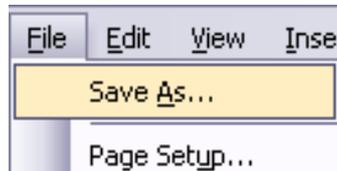
You will first need to create a template letter in Microsoft Word, inserting the applicable Mail Merge Tabs where necessary. See example Letter below. (Appendix A on Pg 12 shows a list of available Mail Merge Tags).



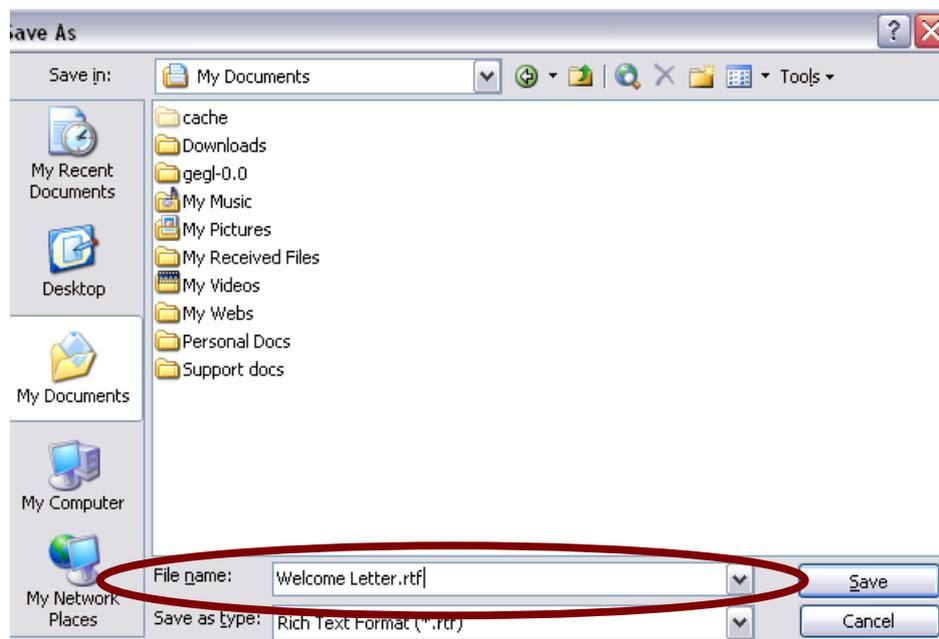
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Once you have finished your template letter, you will need to save it as an **.rtf** file.

To do this, go to **File** and **Save As...**



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



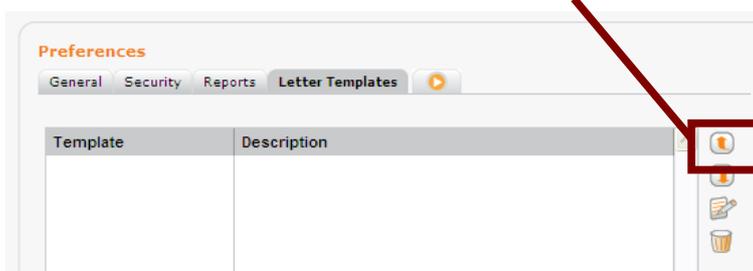
Uploading a Letter Template to G2

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

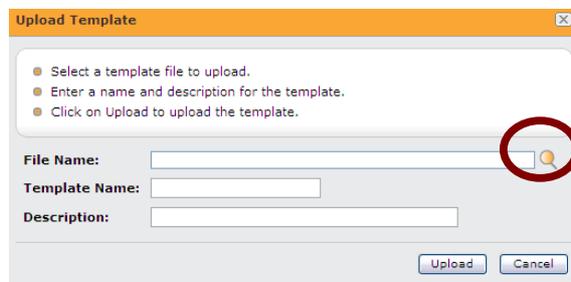
Go to **System Management (1) > Preferences (2) > Letter Templates (3) > Edit (4)**



...Click the Upload button  ...



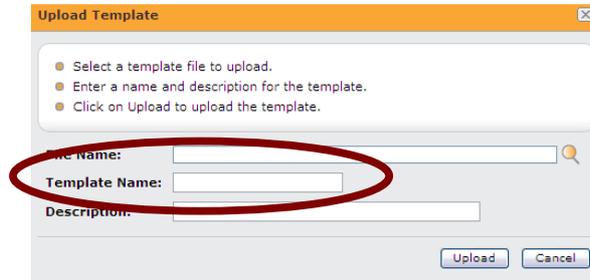
... click the browse button  ...



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

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



The screenshot shows a dialog box titled "Upload Template" with a close button (X) in the top right corner. Inside the dialog, there are three bullet points: "Select a template file to upload.", "Enter a name and description for the template.", and "Click on Upload to upload the template." Below these instructions are three input fields: "File Name:" (with a search icon), "Template Name:", and "Description:". The "Template Name:" field is circled in red. At the bottom right of the dialog are two buttons: "Upload" and "Cancel".

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

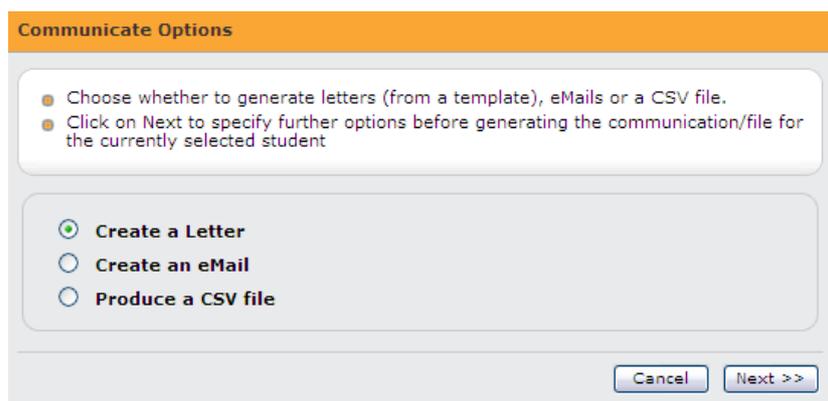
Creating Individual Letters

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)**.

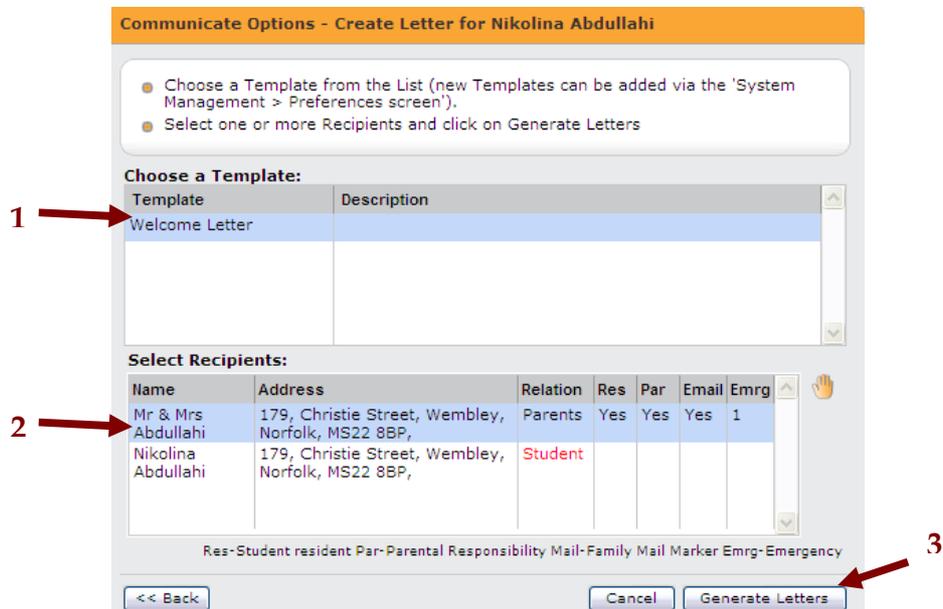


Select **Create a Letter** and **Next >>**



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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 ...



... 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 >>**

The 'Communicate Options' dialog box contains the following instructions and options:

- Choose whether to generate letters (from a template), eMails or a CSV file.
- Choose whether to create communications for all students in the current browse set or just for the currently selected student.
- Click on Next to specify further options before generating the communication/file.

Options:

- Create a Letter
- Create an eMail
- Produce a CSV file

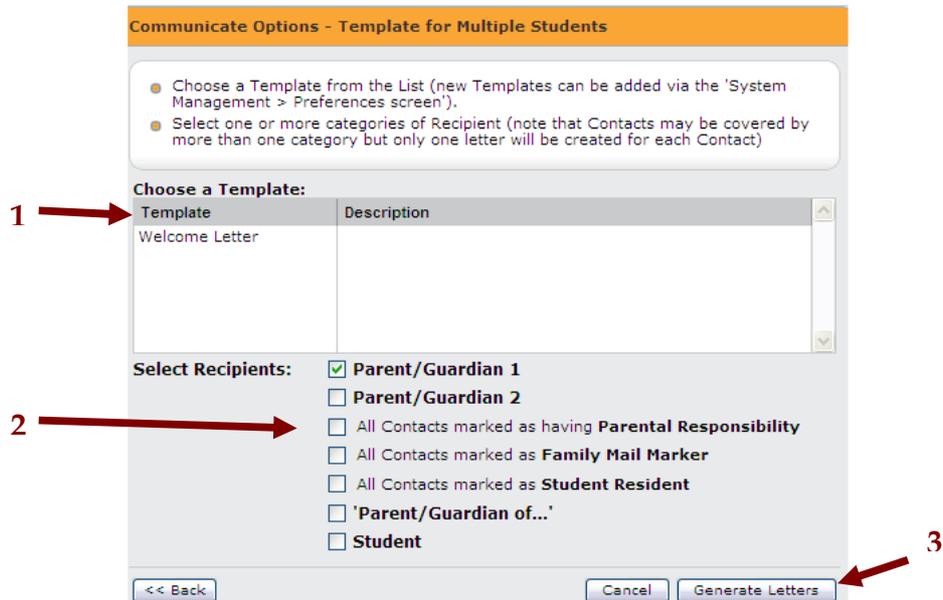
Options:

- Create Communications for all students in the browse set
- Create Communications for the current student only

Buttons: Cancel, Next >>

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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 ...



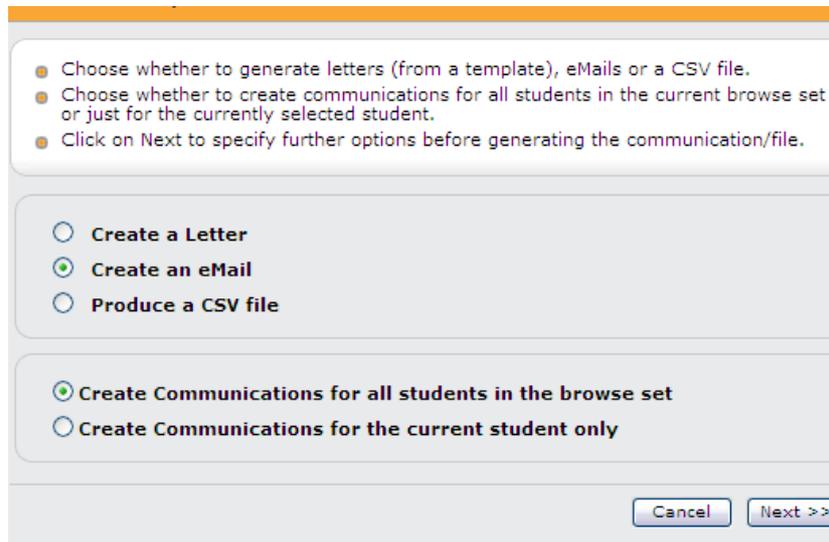
... Click **Open** to view the letters. Once opened, you can print and/or Save the letters in the same way you normally would within Microsoft Word.

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>> ..**



The screenshot shows a dialog box with the following content:

- Choose whether to generate letters (from a template), eMails or a CSV file.
- Choose whether to create communications for all students in the current browse set or just for the currently selected student.
- Click on Next to specify further options before generating the communication/file.

Below the instructions are two groups of radio button options:

- Create a Letter
- Create an eMail
- Produce a CSV file

Below these are two more radio button options:

- Create Communications for all students in the browse set
- Create Communications for the current student only

At the bottom right of the dialog box are two buttons: "Cancel" and "Next >>".

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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)**

Create eMail for Nikolina Abdullahi

- Enter details for Subject and Message Text, and a Reply to address (optional).
- Attach files if required.
- Select one or more Recipient and click on Generate eMails.
- Note that eMails will only be sent to contacts with a valid eMail Address.

Subject:

Message: Dear <Salutation>

Reply to address:

Select Recipients:

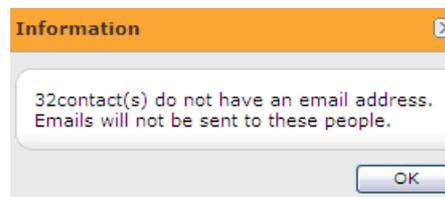
Name	Email	Relation	Res	Par	Mail	Emrg
Mr & Mrs Abdullahi	anita.pirie@redbridge.gov.uk	Parents	Yes	Yes	Yes	1
Nkolina Abdullahi	<no email address>	Student				

Res - Student Resident Par - Parental Responsibility Mail - Family Mail Marker Emrg - Emergency

<< Back Cancel Generate Emails

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.

Generated emails

- Emails have been generated for all listed contacts with a valid email address.
- Click on the Print button to generate a printable version of this list.

Filter: Show all Contacts

Students	Relation	Res	Par	Mail	Emrg
Paul Morris	Parents	Yes	Yes	Yes	1
Jasmeet Singh	Parents	Yes	Yes	Yes	1
Matthew Pendleton	Parents	Yes	Yes	Yes	1
Damian	Parents	Yes	Yes	Yes	1

Res - Student resident Par - Parental Responsibility Mail - Family Mail Marker Emrg - Emergency

Print Close

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

Appendix A

Tag	Actual data source
<KnownName>	STUDENT_MAIN.KNOWN_NAME
<PreferredName>	STUDENT_MAIN.KNOWN_NAME
<FirstName>	STUDENT_MAIN.FIRST_NAME
<SecondName>	STUDENT_MAIN.SECOND_NAME
<Surname>	STUDENT_MAIN.SURNAME
<LegalSurname>	STUDENT_MAIN.LEGAL_SURNAME
<DOB>	STUDENT_MAIN.DATE_OF_BIRTH
<StuGender>	STUDENT_MAIN.GENDER
<Age>	Calculated from STUDENT_MAIN.DATE_OF_BIRTH based on current date
<Year>	YEAR.NAME linked to STUDENT_MAIN.YEARGROUP_ID
<Class>	CLASS.NAME linked to STUDENT_MAIN.CLASS_ID
<Form>	CLASS.NAME linked to STUDENT_MAIN.CLASS_ID
<Year/Class>	Combination of Year and Class as above
<Year/Form>	Combination of Year and Class as above
<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>	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>	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>	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>	SEN_STAGE.NAME linked to SEN_DETAILS linked to STUDENT_MAIN
<House>	HOUSE.NAME linked to STUDENT_MAIN.HOUSE_ID
<Ethnicity>	ETHNICITY.NAME linked to STUDENT_MAIN.ETHNICITY_ID
<Indigenous Status>	ETHNICITY.NAME linked to STUDENT_MAIN.ETHNICITY_ID
<Religion>	RELIGION.NAME linked to STUDENT_MAIN.RELIGION_ID
<MotherTongue>	LANGUAGE.NAME linked to STUDENT_MAIN.MOTHER_TONGUE_LANG_ID

Tag	Actual data source
<PrevSch>	OTHER_SCHOOL.NAME linked to STUDENT_MAIN.PREVIOUS_SCHOOL_ID
<EntryDate>	STUDENT_MAIN.ENTRY_DATE
<DestSch>	OTHER_SCHOOL.NAME linked to STUDENT_MAIN.DESTINATION_SCHOOL_ID
<LeaveDate>	STUDENT_MAIN.LEAVE_DATE
<ReasonForLeaving>	STUDENT_MAIN.MOVEMENT_REASON_ID linke to MOVEMENT_REASON
<Boarder>	STUDENT_MAIN.BOARDER
<BoarderType>	STUDENT_MAIN.BOARDER_TYPE_ID linked to BOARDER_TYPE
<AttendType>	STUDENT_MAIN.ATTENDANCE_TYPE_ID linked to ATTENDANCE_TYPE
<OtherSchool>	STUDENT_MAIN.OTHER_SCHOOL_ID linked to OTHER_SCHOOL
<Reference>	STUDENT_MAIN.REFERENCE
<UPN>	STUDENT_MAIN.UPN
<Exam No.>	STUDENT_MAIN.EXAM_NUMBER
<CC No.>	STUDENT_MAIN.EXAM_NUMBER
<Email>	STUDENT_MAIN.EMAIL
<Phone1>	ADDRESS.PHONE_TEL1 linked to STUDENT_MAIN
<StuAddL1>	ADDRESS.LINE1 for the ADDRESS record linked to STUDENT_MAIN
<StuAddL2>	ADDRESS.LINE2 for the ADDRESS record linked to STUDENT_MAIN
<StuAddL3>	ADDRESS.LINE3 for the ADDRESS record linked to STUDENT_MAIN
<StuAddL4>	ADDRESS.LINE4 for the ADDRESS record linked to STUDENT_MAIN
<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>	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>	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>	ADDRESS.TOWN for the ADDRESS record linked to STUDENT_MAIN
<StuAddCountyState>	ADDRESS.COUNTY for the ADDRESS record linked to STUDENT_MAIN
<StuAddPostcode>	ADDRESS.POSTCODE for the ADDRESS record linked to STUDENT_MAIN

Tag	Actual data source
<StuAddCountry>	ADDRESS.COUNTRY for the ADDRESS record linked to STUDENT_MAIN
<He/She>	Dependent on STUDENT_MAIN.GENDER
<he/she>	Dependent on STUDENT_MAIN.GENDER
<His/Her>	Dependent on STUDENT_MAIN.GENDER
<his/her>	Dependent on STUDENT_MAIN.GENDER
<Him/Her>	Dependent on STUDENT_MAIN.GENDER
<him/her>	Dependent on STUDENT_MAIN.GENDER
<Boy/Girl>	Dependent on STUDENT_MAIN.GENDER
<Male/Female>	Dependent on STUDENT_MAIN.GENDER
<boy/girl>	Dependent on STUDENT_MAIN.GENDER
<male/female>	Dependent on STUDENT_MAIN.GENDER
<son/daughter>	Dependent on STUDENT_MAIN.GENDER
<Doctor>	MEDICAL_DETAILS.DOCTOR linked to STUDENT_MAIN
<Practice>	MEDICAL_PRACTICE.NAME linked to MEDICAL_DETAILS linked to STUDENT_MAIN
<Practice Address>	ADDRESS fields linked to MEDICAL_PRACTICE RECORD (see above). Use the fields as in <StuAddressBlock>
<Practice Tel1>	ADDRESS.PHONE_TEL1 linked to the MEDICAL_PRACTICE record (see above)
<Practice Tel2>	ADDRESS.PHONE_TEL2 linked to the MEDICAL_PRACTICE record (see above)
<Practice Fax>	ADDRESS.PHONE_FAX linked to the MEDICAL_PRACTICE record (see above)
<AddeeName>	CONTACT.INITIALS & CONTACT.SURNAME
<AddeeInitials>	CONTACT.INITIALS
<AddeeFirstName>	CONTACT.FIRST_NAME
<AddeeSurname>	CONTACT.SURNAME
<AddeeSalutation>	CONTACT.SALUTATION (or CONTACT.TITLE, CONTACT.INITIALS & CONTACT.SURNAME if no salutation)
<AddeeTitle>	CONTACT.TITLE
<AddeeAddL1>	ADDRESS.LINE1 for the ADDRESS record linked to CONTACT
<AddeeAddL2>	ADDRESS.LINE2 for the ADDRESS record linked to CONTACT
<AddeeAddL3>	ADDRESS.LINE3 for the ADDRESS record linked to CONTACT
<AddeeAddL4>	ADDRESS.LINE4 for the ADDRESS record linked to CONTACT

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Tag	Actual data source
<AddeeAddressLine>	Address lines for the ADDRESS record linked to the CONTACT record - in same format as <StuAddressLine>
<AddeeAddressBlock>	Address lines for the ADDRESS record linked to the CONTACT record - in same format as <StuAddressBlock>
<AddeeAddressShortBlock>	Address lines for the ADDRESS record linked to the CONTACT record - in same format as <StuAddressShortBlock>
<AddeeAddTown>	ADDRESS.TOWN for the ADDRESS record linked to the CONTACT record
<AddeeAddCountyState>	ADDRESS.COUNTY for the ADDRESS record linked to the CONTACT record
<AddeeAddPostcode>	ADDRESS.POSTCODE for the ADDRESS record linked to the CONTACT record
<AddeeAddCountry>	ADDRESS.COUNTRY for the ADDRESS record linked to the CONTACT record
<AddeeResp>	RELATIONSHIP.PARENT_RESPONSIBILITY
<AddeeSR>	RELATIONSHIP.STUDENT_RESIDENT
<AddeeRelation>	REALATIONSHIP_TYPE.NAME linked to RELATIONSHIP
<AddeeEmail>	CONTACT.EMAIL

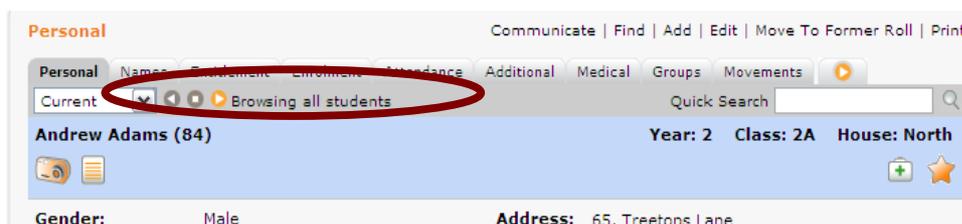
Introduction to Browse Sets

What is a 'Browse Set'?

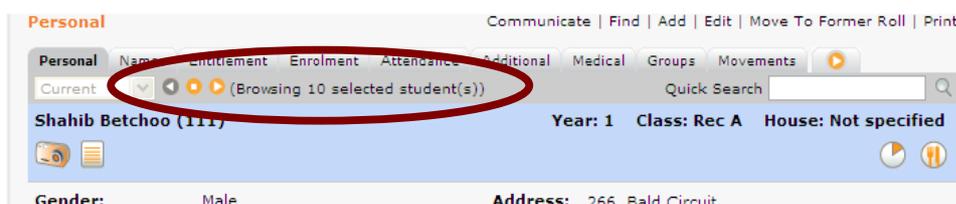
If the criteria searched using the find tool matches more than one record, a list will appear in order for you to select one or more records to be viewed. If you wish to view just the one record, that chosen record will display in the work area. If, however you select multiple records to view, the records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

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

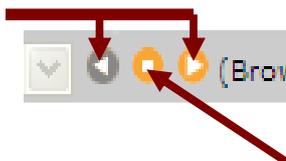


When viewing records in a Browse Set, the number of students in that particular set will be displayed to the right of the browse buttons (as shown below)...



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 .