

## Mail Merge

### Overview

The Mail Merge Module is the location where virtually all communication management is performed, both print and email. Letters are created, edited, and activated/deactivated from this module. From here ad hoc letters are distributed as well. In addition, RMS maintains a print history for each letter and email that has been sent. It also keeps a copy of each communication.

Letters (templates) are created in a PDF format and use a SQL statement to determine who receives the letter. The templates are typically created in a word processing program and saved in a PDF format to a folder on the app server. To do that, the workstation must have Adobe Creator. The SQL statement is created by the Sys Admin elsewhere and pasted into the field reserved for the SQL statement.

Letters are divided into several categories: application merge letters, auto email letters, ad hoc merge letters, conference letters, various letters associated with the property module, and ad hoc email template. The application mail merge letter refers to those letters generated as students proceed through the application process. These can be edited here; however, they are distributed through the Applications module. RMS has auto email letters attached to 100 plus functions so when that function is performed, an email is sent to the person involved in that function. For example, when a RMS user performs a room change for Joe College, Joe receives an email notifying him of this action. During installation, these auto emails are set to inactive and there is a default setting in the Admin module that does turn on and off the entire Auto Email function. However, individual auto emails can be made inactive from this module.

Ad Hoc merge letters are just that. They are created by the user and distributed whenever the user desires. Some examples are the end-of-the-semester notifications, re-application letters, and special thematic housing letters. Many institutions use these letters in conjunction with their incident module to send out judicial notifications. Of course, it can be used to send out any type of mail merge letter like end-of-year letters or room reapplication schedules or past due notices. Finally, the ad hoc email template groups those emails created through the use of the tool bar email function. A side note, each letter type has its own template folder on the app server.

Conference letters work similarly to the application mail merge and are generated from the conference module. Same scenario for the various letters associated with the tow property modules.

Letters are searched and lists created by letter ID number, letter type, letter name, active/inactive, who created the letter, creation date, and date last printed/emailed. List columns include letter id number, letter name, created by, date created, last email date, and last print date. The letter ID is a hyperlink to the print history of that letter.

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## Mail Merge

### New Letter

Creating an ad hoc mail merge letter doesn't really start by clicking the New Letter link. The first task is to create the letter or template in a word processing program and saving it in a PDF format to the ad hoc mail merge folder on the app server. The merge fields are to be entered on the PDF document using the nomenclature that exists in the RMS tables. Then, the user clicks the New Letter link to bring up the New Letter page.

There, the user provides a letter name and then identifies which PDF template to use from the drop down list. By default, the Letter Type is Ad Hoc since that is the only type of letter that users create. The Preview Required check box indicates whether or not the user wants to view the letter before printing. The Active check box marks the letter as one that can be used. The three Label fields provide the opportunity for three sets of labels to be printed along with the letter (this function is in development). They can be different types of labels. The final step is to create a SQL statement.

Here is where the user establishes the criteria to determine who receives this letter and, of course, provide the information for the merge fields. Not only is knowledge of SQL needed here, but the user also needs some knowledge of database functionality in general and knowledge of the content of RMS tables in particular. The following fields are mandatory and must be included regardless if they have no value in them:

1. RMS\_ID
2. First Name
3. Last Name
4. National ID
5. University Number
6. Person Type

Because of the technical nature of creating ad hoc letters, the process of creating such letters is covered more in-depth during the System Administration (Sys Admin) training. The end user really has it easy and to print and/or email an ad hoc letter requires three-four clicks.

## Mail Merge

### Edit Letter

The edit letter function allows the user edit all the information entered when the ad hoc letter was created. One can also edit all other types of letters like application merge letters for example. To edit a letter, first search for that letter, choose it, and then click on the Edit Letter link. The page that appears mirrors the new letter page except it has information in the fields.

Please note the content of the first sentence. The editable information from Edit Letter does NOT include the wording of the PDF document itself. To do that, one must return to the template itself. Of course, anyone who has worked with PDF documents realizes that it is very difficult to edit PDF documents. Our suggestion is that the user deletes the PDF template, recreates it, and saves it using the original name.

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### Example

In this example, we are going to edit a letter.

- *Search* for the **Tutor Thank** letter
  - *Highlight* the letter
  - *Click* the **Edit Letter** link
  - *Edit* the letter name from **Tutor** to **RA**
  - *Replace* =**TUT** with =**RA** in the **SQL statement**
  - *Click* the **Continue** button
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### Exercise 1

Edit the letter name of the tutor letter

## Mail Merge

### Distribute Letter

To send a merge letter, the user selects the letter from the list and clicks the Distribute Letter link. A page appears that details the people who are to receive the letter. The RMS ID located in the grid is a hyperlink to that person's correspondence history. The row of buttons for the print options the user has is located on the bottom of the screen. One can print the letter, email the letter, and print and email the letter. Simply decide which one to use and click it.

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### Example

In this example, we are going to distribute a letter

- *Select* the **Alcohol Incident** letter
  - *Click* the **Distribute Letter** link
  - *Click* the **Email** button
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### Exercise 1

Send the Alcohol Incident letter

## Mail Merge

### Deactivate/Reactivate Letter

These two functions, in essence, turn all letters on and off, including auto and ad hoc email. They are quite easy to do. Just click the appropriate link and follow the Yes/No prompt. They unmark or mark, as the case may be, the Active box located on the Edit Letter page.

This is helpful as an institution may decide that on accounting functions, they do not want an auto email sent, or an assignments coordinator may want to have the wait list letter turned off until needed.

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### Example

In this example, we are going to deactivate and reactivate a letter.

- *Select* the Work Order letter
  - *Click* the **Deactivate Letter** link
  - *Click* the **Yes** button
  - *Click* the **Edit Letter** button and *Review* the **Active** box
  - *Click* the **Continue** button
  - *Click* the **Reactivate Letter** button
  - *Click* the **Yes** button
  - *Click* the **Edit Letter** button and *Review* the **Active** box
  - *Click* the **Continue** button
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### Exercise 1

Deactivate and reactivate the Work Order letter

### Exercise 2

Deactivate an auto email

## Mail Merge

### Distribution History

The Distribution History link produces a list of individuals who received the selected letter. The list also provides the date the letter was printed and/or emailed for that individual along with the RMS user name of the person who printed/emailed it.

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### Example

In this example we are going to view a print history of a letter.

- *Select* the record of the **Training Adhoc** letter
  - *Click* the **Distribution History** button
  - *Click* the **Continue** button
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### Exercise 1

Review the distribution history of the Alcohol letter.

### Exercise 2

Review the distribution history of the charges/credits auto email (#21)