

Letter Manager

Manual

V1.3 R1



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System Requirements

Letter Manager requires a PC running Windows 2000 or later, we recommend a modern processor, at least 256MB memory (preferably 512MB) and 50MB of free hard disk space.

Licence

The licence distributed with this product permits you to use Letter Manager on an unlimited number of computers within your organisation. However should you choose to run Letter Manager across your network it will only allow one concurrent connection, hence only one person can use Letter Manager at any one time. Please refer to our full Terms & Conditions available on our website for further information.

Installation

Before you can use Letter Manager you need to install the software on your computer. This can be done either on a stand alone computer or on your server and run across your network.

Stand Alone Computer Installation

Should you choose to install Letter Manager on a single computer this will be the only computer that can access the data you enter. Please insert the CD into your CD/DVD Drive and follow onscreen instructions during the quick installation process. We recommend installing using default options, once complete you will be able to launch Letter Manager from a shortcut in the Start Menu located within a 'Bransoft' program group.

Network Installation

Letter Manager can be installed on your network server and then accessed by any number of computers within your organisation (providing they can access your server). In order to perform the installation on your server you need to physically be at your server and install as per 'Stand Alone Computer'. When you are prompted for an installation directory it is important you consider the following points:

- You need to install Letter Manager into a folder that is, or can be, shared out across your network so that your workstations can access the program directory, your users need to have full read/write access permissions to this folder.
- We recommend your workstations access the above shared area via a mapped drive letter on their workstation as this will allow the program to perform faster.
- We strongly recommend backing up the Letter Manager program directory on a regular basis, you may choose to install Letter Manager within a shared area that is regularly backed up or add the Letter Manager program directory to your backup selection.

Once Letter Manager has been installed on your server you need to visit each of your workstations and browse to the Letter Manager program directory on the server (via your mapped drive letter). Run '_Workstation Setup.exe' from within the program directory, this will create the 'Bransoft' program group and a shortcut to Letter Manager.

If required, please seek further advice from your network administrator.

Running Letter Manager

To run the program click on the Letter Manager shortcut in the Start Menu located within a 'Bransoft' program group.

The first time you run Letter Manager you will see the following box.

Please enter your name in this box, perhaps in the form 'Mr J Smith'. This is only used when you print out from Letter Manager. The system will print this name along with the date and the time it was printed.



Please be patient when you run Letter Manager for the first time as loading the program for the first time takes a few moments longer.

Letter Manager is designed to run best using a screen resolution of 1024 x 768, the product will work correctly if you are using a different screen resolution however, if you are using a smaller screen resolution such as 800 x 600 you may need to use the scrollbars to see the whole screen.

Every two weeks you will see a message reminding you to backup your data, if your server automatically backs up the program directory you can click 'Ignore' to this message. Please refer to the online support for more information about backing up.

Using Letter Manager

Letter Manager is designed to make the process of writing letters by school administration staff and senior management easier and more efficient. For example, by using Letter Manager you can easily write a letter and then print it out for every pupil in school personalised with the address of each pupil.

Fields used to Hold Information

The boxes within Letter Manager that are used to contain information are called fields, each field is labelled to show what type of information should be stored within that particular field. Often similar fields are grouped together into sections. Letter Manager uses two databases, one is used to store addresses and one is used to store letters. Within each database you will create 'Records' which represent addresses or letters. The blue buttons in the top right corner of the screen are used to navigate between databases.

Addresses:

Type

When you create an address you need to choose what type of address it is, your choices are: Pupils, Staff, Governors and Other.

Name & Address Details

For each type of address you need to enter the name of who it will be addressed to (on the envelope), who the letter should address (Dear...), the full postal address and postcode. When you are entering a pupil you can choose the default name and dear for all pupil, by default this is:

- Name (on envelope) = Parent / Guardian of <<PupilName>>
- Dear (to start letter) = Parent or Guardian



In the Name field <<PupilName>> will be replaced by the name of the pupil. Please bear in mind when you change these defaults they will change for all letters printed. If you know the Parent / Guardians name for pupils you can type this into the Specific for this Pupil fields, if completed this will be used for this pupil, if it is not used then the default will be used. The Result for this Pupil fields show what will be printed for each pupil.

Other Information

When the type is pupil it is also important to enter the Pupils Name, Teacher Name and Class Name/Number. This is useful if you want to send a letter to pupils in class 1. When the Type is Staff you can also enter the type of staff such as Teacher, Classroom Assistant, etc, this is useful if you just want to write letters to classroom assistants, by entering this information you will be able to easily find them. Again when the type is other we recommend you enter a type.

Notes

Any other information can be entered into Notes.

Letters Sent to this Address

Whenever you send letters to each address a record of them will be stored for historical purposes, Letter Manager allows you to reprint them if required.

Letters:

Created Details

These fields record when the letter was created (date & time) and allows you to enter your name as the writer of the letter.

Letter Summary

The title and description of the letter allow you to enter information which will be useful if you want to find a letter previously sent as Letter Manager allows you to re-send a previous letter either to the same people or to different people. By re-using letters already written this reduces the administration time.

Letter

This is the content of the letter and what will be printed.

Standard Tools

List & Form View

The main screen for Letter Manager is the one where all information is shown for a single address or letter depending on which database you are in, this is called the 'Form' view. The other popular view is a list view where the most popular fields are shown across the top of the screen and information from multiple records are shown on one screen, if you have a lot of records you will be able to scroll down this list. A list is similar to a spreadsheet. The first of the standard tools toggles between list and form view. When you are in list view you can click on the green arrow on the left hand side to toggle to form view, this will show the record which was alongside the green arrow you clicked.

Find

The find or search functionality of a database is very powerful especially if you have hundreds or even thousands of records. The find functionality will find records that match the search criteria in which you type in. When you click on 'Find' you will be taken to a screen just like the form view but without any information. For example if you want to find a particular address and you know the pupil name you can click on find and then type in the name of the pupil in to the appropriate field, click on 'Continue' or press 'Enter' to display address that match your search criteria. When you have performed a Find always look at the number of

records you have found, this is called your 'Found Set', this is shown just below the navigation arrows and has a green background, it will look something like 'Record 1 of 10'. If you have searched on a class name/number you may find one or more address because there will be more than one pupil in that class, if you are looking for one address in particular you will need to scroll through the addresses to find the one you want.

Print

When you are in the Form view you will print the information on screen, you will be asked if you want to print the current record or the records being browsed, if you select current record just one page will print showing the information on screen. If you select records being browsed this will print one page for each record in the found set. The found set is shown in the record ## of ## (the later number is the number of records in the found set). Alternatively if you are in List view a list will be printed.

Edit

In order to change information on a record you must first go into Edit mode, when complete click on 'Finished'.

New

To add a new record click on New, this will create a new record and allow you to enter information, when complete click on 'Finished'. Please ensure you are in the correct database, to create a new Address the Address button in the top right corner should be grey not blue.

Delete

To delete a record click on Delete, please note that this cannot be un-done. This delete function should only be used in rare occasions to permanently delete a record from the program. Deleting the record is just for when a record has been created by mistake. The address or letter displayed will be the one that is deleted.

Actions

This button takes you to the Actions Menu where a range of actions can be carried out, most of them relate to the item you were previously viewing. Please note the Actions button is only available in form view within Addresses. Please see later for more information on Actions.

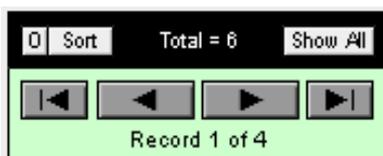
About

The about button takes you to the About screen where you can see contact details for Bransoft along with the version number of the software you are using.

Exit

The Exit button closes down the program, alternatively the standard windows cross in the top right corner of the screen can be used. All information is saved automatically, a save button is not required.

Navigation Tools



The navigation area provides you with several pieces of information along with a number of tools, At the top the total number of records that you have in your database is shown, in this example there are 6 records in your database. At the bottom it shows how many records you have in your current found set and also which record you are viewing, in this example you are on record 1 of 4.

The arrows are used to navigate around the found set of records, the first button will take you to the first record, the second button takes you to the previous record, the next button takes you to the next record and the last button takes you to the last record in the found set.

When you have finished looking at the records in the found set and you want to see all records again you need to click on the 'Show All' button.

In the top left corner of the navigation tools there is a button labelled 'O', this button is used to omit the current record from the found set, in this example after you clicked omit you will just have 3 records in the found set and what was the second record will become the first. This does not delete the record in any way, it simply hides it. This could be useful if you want to print a specific list of records and the found set includes some records that you don't want to print out, you can simply omit the ones you don't want to include.

There are two ways to sort your records, the first is to go to the list view where you can sort the found set on any column by clicking on the column heading, the first time you click it will sort the records in ascending order, click again and it will sort the records in descending order. For some fields it will also sort them in a custom order based on a list of pre-defined values. If the field you want to sort your records by is not in the list view then you can use the sort button to select the field names you want to sort on. To do this move the fields you want to sort on to the right hand side, select whether you want them ascending or descending and click on sort.

Actions Menu

Write a Letter

Write a Letter is the main function within Letter Manager, clicking this button will start the process of writing letters to the current found set of records. If you want to send a letter to just one person you need to ensure you have found that one person, in the navigation area it needs to state 'Record 1 of 1'. If you want to send a letter to all pupils you need to have performed a find on Type = Pupil. Once you are happy the found set are the people you want to send this letter to, go to Actions and then click Write a Letter. You now need the letter in which you want to print, this can be accomplished in a number of ways:

- Create a New Letter by clicking on 'New'
- Resend a Letter that is already created, in this case you need to find the letter you want to send out.
- Duplicate an existing letter and change it to what you want to send out, Click Duplicate and then update the letter.

Once you have found the letter you want click on 'Print this Letter'. You will be asked to enter your name, this will be stored as the person who is sending these letters out.

The next step is to choose the design for your letter, you have four designs, the first is designed to be printed onto your own school letter headed paper, alternatively you can click on the yellow button to add your own school logo and school details. The other three ways are different letter designs using the logo and information you have added.

Your letters will now be printed and you will return to the Addresses database and you will see a record of this letter has been added to the history of each address.

View All Letters

This allows you to view all letters that have been written using Letter Manager and allows you to update them, create new letters and delete letters. Click on the blue button at the top of the screen to return to the addresses section.

Import Addresses from your School Management System

This option allows you to import electronically pupil records from your school management system, it can also be used to import other addresses if you have them in electronic media such as a spreadsheet. Due to the varied range of systems in use we recommend you contact Bransoft for further assistance should you need this feature.

Re-enable Screen Resolution Check

When Letter Manager opens you may have seen a message warning you about using a screen resolution other than 1024 x 768, if you clicked Ignore to this message then the message will not appear again, however if for any reason you wanted to see the message again click on this button.



Re-enable Backup Reminder

When Letter Manager opens you may have seen a message reminding you about performing a backup, if you clicked Ignore to this message then the message will not appear again, however if for any reason you wanted to see the message again click on this button.

Additional Support

Please refer to our website (www.bransoft.co.uk) for online support, you can also go directly to our support website by clicking on the orange 'Online Support' button which can be found on the 'About' screen.

Alternatively please contact Bransoft directly by email (info@bransoft.co.uk) or telephone (01457 821212) for further support.

If you have any comments or suggestions to improve this product we would like to hear from you.