



EVERY CHILD IS A NATIONAL ASSET



ABC of... STANDARD LETTERS AND FORMS

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
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General Instructions on using SA-SAMS Manual:

- ✓ Click on the **menu option** to open the required screen.
- ✓ Click on **Save** to update all capturing.
- ✓ Click on **Done** to exit the screen.

The following symbols are used in the manual to indicate the required action with every screen:

					
Background Information	Data used in other modules or pre-captured data needed	Options in drop-down tables	Screens that require capturing	Printouts and Reports	Summary and Stats screens

A. INTRODUCTION

1. Purpose of the module



The **Standard Letters and Forms** module (Fig. 1) includes the management of correspondence between the school and standardising and quality assurance of learner and staff details to be captured.

SA-SAMS : School Administration and Management System MAIN MENU	
1. General School Information	11. Financial Assistant
2. Human Resource Information	12. Curriculum Related Data
3. Learner and Parent Information	13. Timetabling Assistant
4. Learner Listing	14. Physical Resources
5. Governance Information	15. Library Module
6. Standard Letters and Forms	16. Security and Database Functions
7. Export Data	17. Lurits Approval Module
8. Annual National Assessment	

Figure 1: Main Menu



Usage of this Module is dependent on data already being captured in other modules e.g.

Module	Data to be pre-captured (with the associated screen no)
1	School Details (1.1), importing the school logo (1.16) Grades (1.2), Classes (1.3), School Terms (1.6), subjects (1.5) offered by the school
2	Educator Details (2.1) and Staff Details (2.3)
3 or 4	Learner Data (3.1.1), Learners Assigned to Classes (3.1.5) Parent Information (3.1.11) Future Learners (3.1.2)

B. THE COMPONENTS OF THIS MODULE

2. Module 6: Standard Letters and Forms



This module can be divided into 3 sections according to the allocated functions:

- Creation and printing of official letters and labels.
- Printing blank and populated registration forms.
- Exporting of learner and parent contact details.

These sections are tabled below with the associated functionalities and screens that are used in this manual:

Sub-Heading in Manual	Screen	Functionality
2.1 Letters & labels merged with addresses & names	6.1 Standardised Mail Merge Letter	<ul style="list-style-type: none"> • Create letter / select existing letter (to update or change for new use) • Add letter to recipient group • Merge letters with recipient name & address • Mail merge and find letter in WinWord • Print letters • Print labels with addresses
2.2 Application Forms	6.2 Print Blank Application Forms	Blank registration forms for Capturing <ul style="list-style-type: none"> • Educator • Staff • Learner & Parent
	6.3 Print completed forms	Pre-populated forms for Verification <ul style="list-style-type: none"> • Educator • Staff • Learner • Parent • Future learner
2.3 Learner & Parent Contact Data	6.4 Learner Parent Export	Print lists per grade, class or all <ul style="list-style-type: none"> • with contact data of learner and all parents Export lists per grade, class or all <ul style="list-style-type: none"> • with contact data of learner and all parents

Figure 2 shows all the sub-menus. The functionality and purpose of every component will be discussed separately.

SA-SAMS : School Administration and Management System	
6. STANDARD LETTERS AND FORMS	
6.1. Standardised Mail Merge Letter	
6.2. Print Blank Application Forms	
6.3. Print Completed Data Forms	
6.4. Learner Parent Export	

Figure 2: Standard Letters and Forms Menu

2.1 Letters & labels merged with addresses & names (Menu 6.1)

This section assists with creating a **standard letter/ memo** that automatically updates it with the following:

- Letters with school address and logo
- Letters addressed to individuals from a selected group
- Letters can be saved for reference, recalled and updated for new event (e.g. parents day, misconduct notification), used as a standard for other communication.

This section can also **print address labels** from a group as requested.

Click on Standardised Mail Merge Letter to open screen shown as in Figure 3.

The screenshot shows the 'Standardised Mail Merge Letter' window. At the top, a message states: 'LETTERS AND LABELS are only available if MS Word is installed on the computer'. Below this, the 'Select Letter + Label Recipients' section includes a 'Total Number of Recipients in Category:' field and radio buttons for 'Parents', 'Future Parents', 'Learners', 'Future Learners', 'Educators', 'Other Staff', and 'SGB Members'. A 'Parent Filter' section has radio buttons for 'All Parents' and 'Account Payers Only', with a sub-section for 'Parents relating to learners in specific grade or class' containing 'Learner Grade:' and 'Learner Class:' dropdown menus. Language options for 'English' (checked) and 'Afrikaans' are also present. The 'Create Letter' section has radio buttons for 'Create Letter', 'Use Own Letterhead', 'Use school logo', 'Create Address Label', and 'Create Learner Label', along with a 'Done' button. The 'Text of Letter' section has radio buttons for 'Create New Letter' and 'Select Existing letter'. A large text area is provided for entering the letter content. On the right, a 'Details' section includes a 'Description/Name of Letter' field and 'Save Letter Text' and 'Delete this Letter' buttons. At the bottom right, a 'Text Font' section has a 'Change Font Name and Size' button. Two 'Create Mail Merge Letters' buttons are located in the top right corner.

Figure 3: Standardised Mail Merge Letter

2.1.1 Create Address Labels

Address labels can be printed for a class or per grade, for current or future parents and learners. Parents, learners, staff and SGB's address details need to be captured in order to use this function.

Select and tick **Create Address Label** (Fig. 3).

- Select and tick on the group of recipients on the left (Parents, learners etc.)
- Select a grade when using options: parents, learners, future parents and learners.
- Click on **Create Mail Merge Label** to select the settings and the **type and number of labels** on the insert screen. (Fig. 4)
- Click on **Ok** and open **Windows Word** to view the labels. (Fig. 5)
- Click on **Print** in the Windows Word screen.

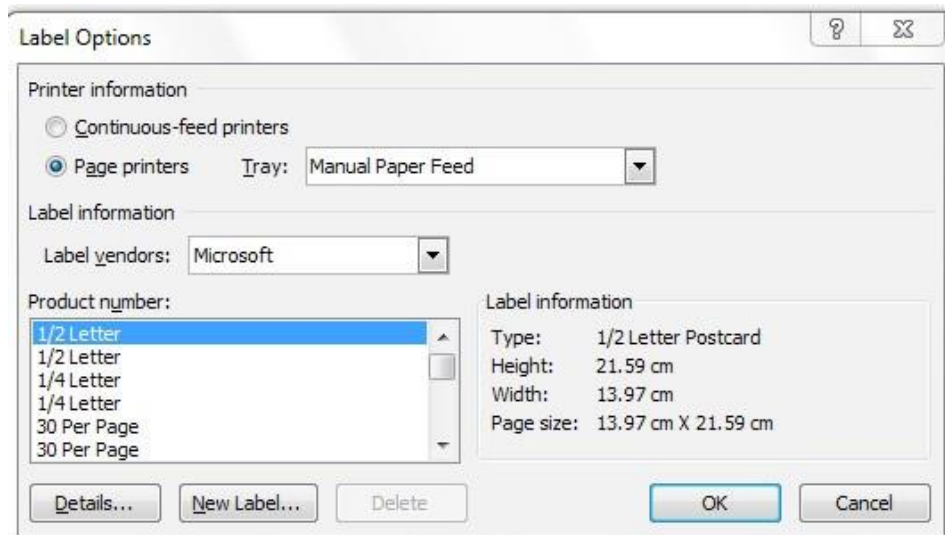


Figure 4: Select Options for Label Printing

Below is an example of a label printout.



Figure 5: Example of a Label Printout.

2.1.2 Mail Merge Letters



This section assists with creating a **standard letter/ memo** that automatically updates it with the school address and logo and addressed to individuals from a selected group.



Letters can be saved for reference, recalled and updated for new events (e.g. parents day, misconduct notification), used as a standard for other communication.



Parents, learners, staff and SGB's details need to be captured in order to use this function.



Select and tick **Create letter** in order to create a new letter (Fig. 3 & 6).

- Write a name/ description for the letter e.g. Parent Circular 1- 12/2/2013.
- Type the content of the letter or copy and paste content from another source.
 - Click on **change the font and size** to alter the print of the content.
- Click on **Save Letter Text**.



Existing letters can be retrieved by selecting **Select Existing Letters**.

- Click on an existing letter to populate the content.
- Rename the letter, update content and click on **Save Letter Text**.

Standardised Mail Merge Letter (6.1)

LETTERS AND LABELS are only available if MS Word is installed on the computer

Select Letter + Label Recipients

Total Number of Recipients in Category:

Parents Future Parents
 Learners Future Learners
 Educators
 Other Staff
 SGB Members

Parent Filter

All Parents Account Payers Only
 Parents relating to learners in specific grade or class
 Learner Grade:
 Learner Class:

English Afrikaans For letters only

Create Letter Use Own Letterhead Use school logo Create Address Label Create Learner Label

Text of Letter

Create New Letter Select Existing letter: Parents evening 24 March 2013

You are invited to the quarterly parents meeting to discuss the progress of your child to date. You are welcome to make an appointment with a particular educator regarding a concern with your child's performance.
 Date: 24 March 2013
 Time: 15h00 to 18h00
 Venue: Subject and register classes
 Regards
 Principal

Details

Description/Name of Letter
Parents evening 24 March 2013

Text Font

Figure 6: Select Options for Mail Merge Letters



Select the following to edit the letter for printing and to recipients (Fig. 6).

- Select and tick one of the following:

Use own letterhead	• Printing on paper with printed letterheads
Use school logo	• Printing on blank paper
Leave blank	• No letterhead

- Select the group of recipients on the left (Parents, learners etc.)

All Parents	• All registered parents with addresses
Account payers	• Only parents that pay school fees

- Select a grade when using options: parents, learners, future parents and learners.
- Click on **Create Mail Merge Letters**.
- Click on **Ok** and open **Windows Word** to view all the letters. (Fig. 7)
 - Each letter contains the name of the recipient with address.
- The format of the letter can be changed individually in the WinWord screen.
- Click on **Print** in the Windows Word screen to print all the letters.

Mr AARON
PO Box 222
Pretoria
0001
Learner Name: James SMITH Class: 7A
2013/03/06

Dear Mr AARON

*You are invited to the quarterly parents meeting to discuss the progress of your child to date.
You are welcome to make an appointment with a particular educator regarding a concern with your
child's performance.*

Date: 24 March 2013

Time: 15:00 to 18:00

Venue: Subject and register classes

Regards

Principal

Figure 7: Example of a letter created by Mail Merge Letters

2.2 Application Forms (Menu 6.2 & 6.3)



The registration forms available are compiled according to prescribed policy.

2.2.1 Data on Educators, Staff and Learners/ parents are captured from manually completed registration forms.



- The **original completed forms** are part of the **source documents** that are needed for an **audit trail**.
- These documents must be accompanied by a **certified copy** of the **ID or Birth certificate** and must be **filed in the Learners profile file**.

2.2.2 **Data must be verified at least annually** in order to ensure that the **data is correct** /valid. Schools can print pre-populated forms and send it to the parents, educators and staff for verification. Verified forms must be stored in the learner or staff files as part of the paper audit trail. (QUALITY ASSURANCE PROCESS)

2.2.1 Print Blank Application Forms (Menu 6.2)

The following blank forms are available: (Fig. 8)



- Blank Learner & Parent Application Form
 - Blank Educator Form
 - Blank Staff Form
- Click on **Print Blank Application Forms**.
- Select the form to be printed and click on **Print**. (Fig. 8).
 - The **Print Setup** window will open and you can select options or click on **Ok** to continue the Print Preview window.
 - The **Preview Window** gives an indication of what the printed report will look like.
 - Click on **printer image** to print a blank registration form.

When finished click on **Done** to exit the screen

SA-SAMS : School Administration and Management System
6. STANDARD LETTERS AND FORMS

6.1. Standardised Mail Merge Letter

6.2. Print Blank Application Forms

Print Blank Forms

Print Blank Forms to be completed

Blank Learner + Parent Application Form Afrikaans

Blank Educator Form

Blank Staff Form

Print Done

Figure 8: Select Blank Application Form

2.2.2 Print Pre-populated Forms (Menu 6.3)

The following completed forms (forms with captured data) are available: (Fig. 9)

- o Learner
- o Parent Form
- o Educator Form
- o Staff Form
- o Future Learners



Click on **Print Completed Data Forms** (Fig. 9 & 10).

- **Select the form** to be printed and **choose the following options** to select the printout:

	Per group		Select all	Filter /Specific for individual
Educators			Print all on current data list	Select from drop-down list
Staff				
Parents	Select by surname	Print all in		
Learners	(1 st letter all)	Class		
Future Learners				

Click on **Print**.

- The **Print Setup** window will open and select options or click on **Ok** to continue the Print Preview window.
- The **Preview Window** gives an indication of what the printed report will look like.
- Click on **printer image** to print a blank registration form.

When finished click on **Done** to exit the screen

Figure 9: Select Completed Forms: Educators and Staff

Figure 10: Select Completed Forms: Parents and Learners

2.3 Learner & Parent Contact Data (Menu 6.3 and also Menu 2.7)



All contact details of the learner and linked parents / guardians are listed in this page.

- This list can be used as a register for the SGB elections.
- ☞ Click on **Learner Parent Export** to open the current register (Fig. 11).
 - Select the **group** (all grades or per grades or class).
 - Click on the **Go**.
 - Click on **Print** to print a hardcopy.
 - Click on **Export to Excel** to export the parent and learner list to an Excel file for further data use.
 - To refresh the page click on **Reset**.

When finished click on **Done** to exit screen

Learner Parent Export

All Grades
 All Languages
 The maximum number of learners that can be displayed is 2000. Use the grade option to reduce the number.

Select Grade:
 Select Language:

Select Class:

LEARNER DETAILS							
Number	Surname	First Name	Gender	Grade	Class	Cell#	Email
1	BOBO	Zane	M	Grade 7	7A	0820840861	ZET@gmail.co
2	SMITH	James	M	Grade 7	7A		

Sheet continues □

Learner Parent Export

All Grades
 All Languages
 The maximum number of learners that can be displayed is 2000. Use the grade option to reduce the number.

Select Grade:
 Select Language:

Select Class:

FATHER DETAILS			MOTHER DETAILS		
Surname	Email	Cell#	Name	Surname	Email
AARON			Louise	WEST	

Figure 11: Learner Parent Export

C. SUMMARY

The **Standard Letters and Forms module** includes the management of correspondence between the school and standardising and quality assurance of learner and staff details to be captured.

This module can be divided into 3 sections according to the allocated functions:

- Create and print of official letters and labels.
- Print blank and populated registration forms.
- Exporting of learner and parent contact details.

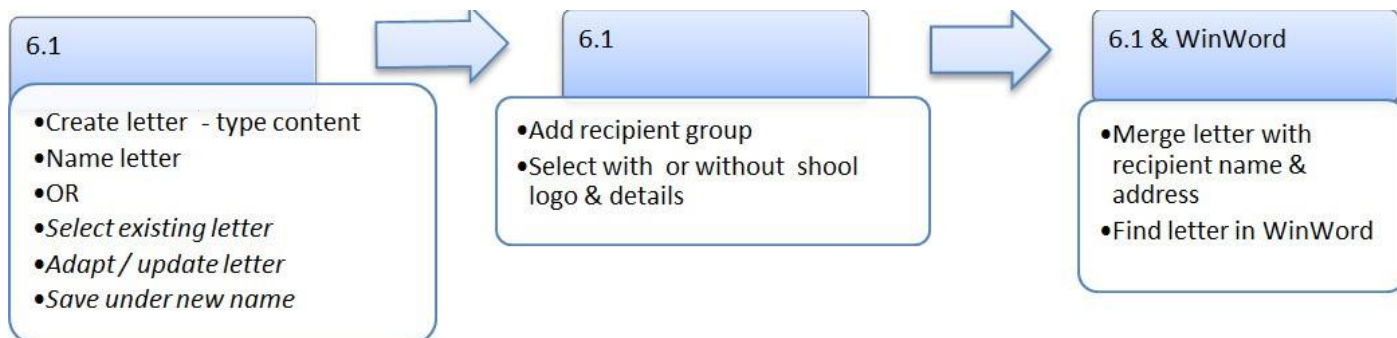
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2.3 Learner & Parent Contact Data	6.4 Learner Parent Export	Print lists per grade, class or all <ul style="list-style-type: none"> • with contact data of learner and all parents
		Export lists per grade, class or all <ul style="list-style-type: none"> • with contact data of learner and all parents

3.2 “How to...” flow diagrams & other important summaries:

- **Create & merge letters**



- **Advantages of using merge letters**

One letter is duplicated and ...	<ul style="list-style-type: none"> ○ addressed to each selected individual
A letter is “merged” automatically with ...	<ul style="list-style-type: none"> ○ school address and logo ○ individuals with addresses from a selected group
Letter format and content reused	<ul style="list-style-type: none"> ○ Letters can be saved for reference, ○ Letter can be recalled and updated for new event (e.g. parents day, misconduct notification) ○ Used as a standard for other grades (or functions) e.g. memos, circulars, sport and extra-mural letters.



- **Using Registration forms for QUALITY ASSURANCE PROCESS :**

Blank Registration Forms	Completed (pre-populated) forms
<ul style="list-style-type: none"> • ORIGINAL source document for details of learners, parents, educators & staff 	<ul style="list-style-type: none"> • Source document for VERIFICATION of details from learners, parents, educators & staff
<ul style="list-style-type: none"> • Data completed manually on the form 	<ul style="list-style-type: none"> • Data corrected manually
<ul style="list-style-type: none"> • Stored/Filed with copy of ID / Birth certificate in Learner Profile, Educator or Staff File 	
<ul style="list-style-type: none"> • Source document for data audit 	

- **Advantages of using Learner Parent Export**

Contact details of Learner and all parents available for...	when directly printed	<ul style="list-style-type: none"> ○ Contact list for register teacher
	when exported to Excel & after removing some columns	<ul style="list-style-type: none"> ○ Voting register for SGB elections ○ Attendance register for AGM

Feedback/Contact Form

Your feedback is important to us. Please leave any comment that you want. If you are struggling with anything in this module, please send us an email and remember to also give us a number or email to contact you back with.

Contact Name:

Email Address:

Cellphone Number:

Version of SA-SAMS:

Operating System:

District / Province:

Comments / Problem Details:

Send Email

Contact Person

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