



Letters Guide

How to Create and Print Letters for Candidates



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Introduction

As well as taking care of the basic requirements for a medal test session, MedalTest Organiser contains facilities for you to be able to produce professional looking letters to your candidates to advise them of arrangements both before and after the exam session.

The system allows you to create a number of different types of letter for different activities relating to a medal test session. You can produce letters advising your candidates of the medals to be taken, along with the associated fees due. Another letter may contain timings for the exam session, or the details for a presentation event. You can decide what you want to say, and how you want to say it.

This guide will cover the following:

- The different types of documents that can be created, and what they look like
- How to set up the content of a letter
- How to produce the letters for the candidates

It is assumed that you are already familiar with the basic functions of the system as described in the Quick Start Guide.

Document Layout

All the documents produced by the system have the same general layout. Each has five sections as shown in the example Exam Notification letter below:



INTERNATIONAL DANCE TEACHERS' ASSOCIATION

The Test Dance Centre

Header

Candidate: Nelly Elephant

Medal Test Date: 01 Apr 2009

Top Section

Dear Parents,

Please note that our next IDTA examination session will take place on 01 Apr 2009. Further details, including all individual exam times will be provided nearer the time.

Listed below are details of the test(s) that Nelly has been practising for. Please tick the column to confirm the exams that you wish Nelly to take. Please then sign and return this form, enclosing the necessary examination fees.

Cheques should be made payable to 'The Test Dance Centre'.

Should you have any questions regarding the exam please quote Nelly's PIN number (ABC404) in all correspondence.

Any text you like can be placed into the system and letters are then automatically printed with that text. The section at the top of the letter (candidate name and date of test) are fixed, and the table at the bottom showing the exams to be taken is fixed. As an example I have also added a line for the parents to sign and to write the total amount they are enclosing for the test.

Yours faithfully,
Joe Soap

Parent's Signature:

Total Amount Enclosed:

Free Format Middle Section

Branch	Grade	Exam Fee (£)	Confirm
Freestyle Solo	International Award 1	53.49	<input type="checkbox"/>
Latin	Presidents Award 3	42.49	<input type="checkbox"/>
Rock and Roll	Star 2	35.99	<input type="checkbox"/>

Bottom Section

The Test Dance Centre, The Dance Club, Foxtrot Lane, Dancington, Danceshire, A12 3AZ, t: 0123 456 7899, e: info@medaltest.com, w: www.medaltest.com

Footer

Document Sections

Header

The header for each letter is standard and fixed. The letter will show the IDTA logo on the left hand side, and the IDTA name across the top. The school name will then be printed in bold type underneath.

Top Section

The content of the top section is dependent on the type of document chosen or it may not be present at all. Typically it will show the candidate name and/or the date of the exam session.

Middle Section

The middle section of every document is completely free format. The later sections of this document describe how to set up the content of the free format middle section. You are also able to personalise the letter by entering candidate details within the free format section.

Bottom Section

The content of the bottom section is dependent on the type of document chosen or it may not be present at all. Where it is present it will be in the format of a table of medals being taken by the candidate at the session.

The Examination Notification Letters have a table in the bottom section containing a column for exam fees. Please note that amounts will only appear if these have been set up in the Exam Charges section of the system (see the Exam Charges Guide). If fees have not been set up the column will appear blank.

The Examination Timetable Letters include the exam time with the branch and grade indicating the time of the candidate's exam. If the time has not been set the column will appear blank.

Footer

The footer is optional. If it is present it will contain the name, address and contact details of the school as stored within the School Section of the system. The footer is selected by setting the option within the Preferences button of the School Section.

Document Types

The different types of letter that can be produced are listed in the Documents section of the system. It is within here that they are accessed and the middle section free format text set up to your requirements.

- Enter the Documents system by clicking on the Documents tab on the Main Menu at the top of the screen.



You will be presented with a screen listing the different document types, as shown.

Document Types			
Letter Templates			
Select	Document	Max Free Format (Lines)	Description
<input type="checkbox"/>	Generic Examination Letter	38	Top: Blank Middle: Free format Bottom: Blank
<input type="checkbox"/>	Examination Notification Letter	32	Top: Candidate Name and Date of Test Middle: Free format Bottom: Test Details Table (including fees)
<input type="checkbox"/>	Presentation Letter	34	Top: Candidate Name Middle: Free format Bottom: Test Details Table (branch and grade only)
<input type="checkbox"/>	Examination Timetable	32	Top: Candidate Name and Date of Test Middle: Free format Bottom: Test Details Table (including exam times)

«FIRST <PREV (Page 1 of 1) NEXT> LAST»

The document names shown are only intended to be used as a guide for typical use. You can use the different formats for whatever actual purpose you require.

The description column shows what will appear in the top middle and bottom sections of each type of document. Use this information to determine which type of letter you wish to use. The Generic Examination Letter has no top or bottom section, so is completely free format.

The Max Free Format (Lines) column shows how big the free format middle section may be so that it will fit within the letter. You will not be able to enter more lines than this.

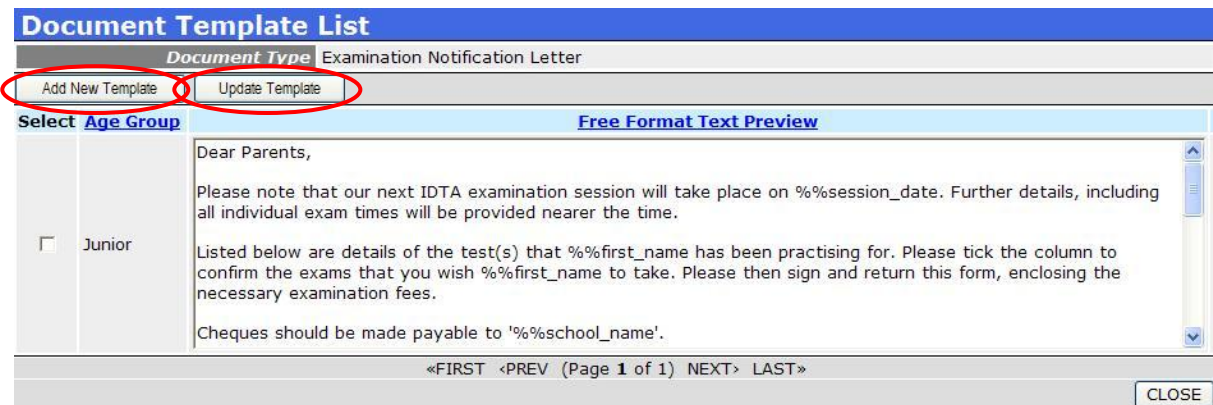
- Select the document type for which you wish to set up your template and click the *Letter Templates* button.

Setting up a Letter

After you have selected the document type you will see any document templates that you have previously set up. This screen previews 10 lines of any existing templates. The screen will be blank if you have not previously set up any templates for this document type.

Each document type may have a Junior template and an Adult template. This is so that you can tailor the letters accordingly. For example, you may wish to begin the letters for Juniors with the phrase 'Dear Parents'. You may, for example, choose not to provide letters for Adult candidates at all.

The example screen below shows that a Junior template has been previously set up. An Adult template has not been set up.



The screenshot shows a web interface titled "Document Template List" for the document type "Examination Notification Letter". At the top, there are two buttons: "Add New Template" and "Update Template", both of which are circled in red. Below these buttons is a table with columns for "Select" and "Age Group". The "Age Group" column has a dropdown menu currently set to "Junior". The "Select" column contains a checkbox. To the right of the table is a "Free Format Text Preview" area containing the following text: "Dear Parents, Please note that our next IDTA examination session will take place on %%session_date. Further details, including all individual exam times will be provided nearer the time. Listed below are details of the test(s) that %%first_name has been practising for. Please tick the column to confirm the exams that you wish %%first_name to take. Please then sign and return this form, enclosing the necessary examination fees. Cheques should be made payable to '%%school_name'." At the bottom of the preview area, there are navigation links: "«FIRST <PREV (Page 1 of 1) NEXT> LAST»" and a "CLOSE" button.

For each document type that you intend to use, you MUST enter the free format text that will appear in the middle section. Note: if you do not enter any text the system will NOT produce any letters for that document type.

Setting a New Template

- ➡ Click the *Add New Template* button.

If both Adult and Junior Templates have already been created this button is not available. Instead, modify one of the existing templates (see below).

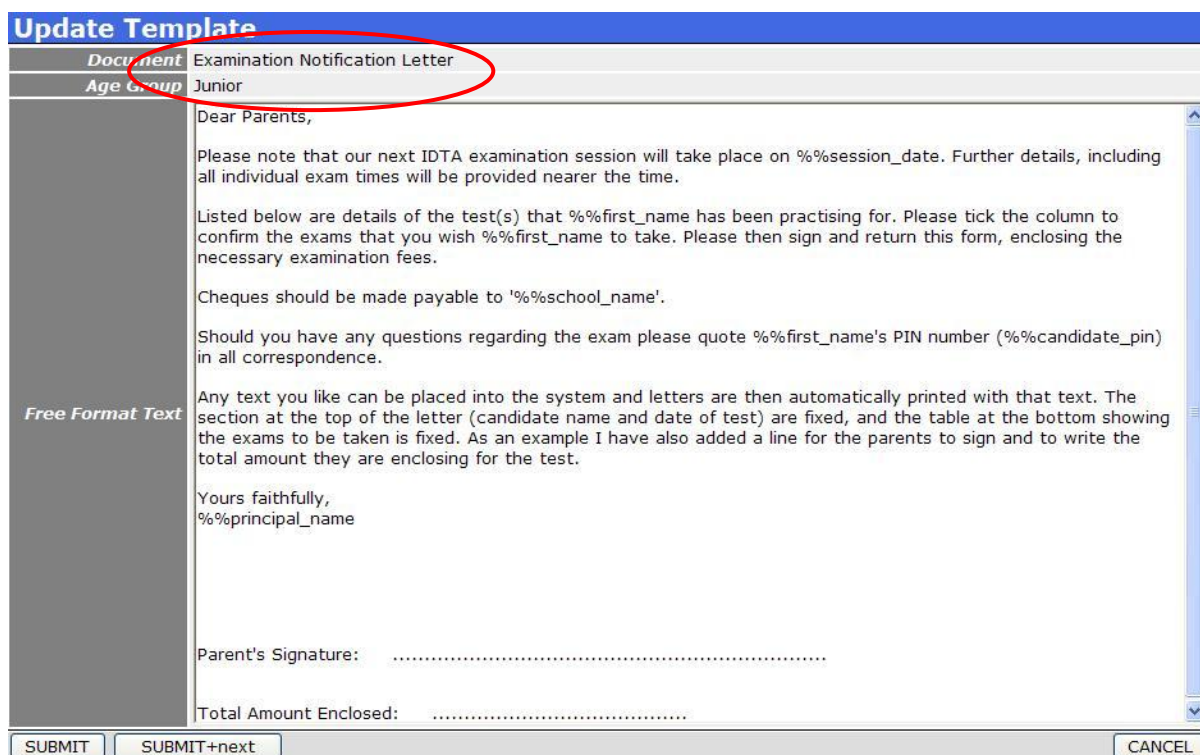
Modifying an Existing Template

- ➡ Select the Age Group for the template you wish to modify
- ➡ Click the *Update Template* button.

The New Template or Update Template screen is shown, depending on which button has just been pressed.

The Document Type will be shown at the top of the screen.

The Age Group for the template will be shown if modifying an existing template. In the New Template screen select the Age Group for which you wish to create a template. Only Age Groups that do not already have a template will be available.



Update Template

<i>Document</i>	Examination Notification Letter
<i>Age Group</i>	Junior

Dear Parents,

Please note that our next IDTA examination session will take place on %%session_date. Further details, including all individual exam times will be provided nearer the time.

Listed below are details of the test(s) that %%first_name has been practising for. Please tick the column to confirm the exams that you wish %%first_name to take. Please then sign and return this form, enclosing the necessary examination fees.

Cheques should be made payable to '%%school_name'.

Should you have any questions regarding the exam please quote %%first_name's PIN number (%%candidate_pin) in all correspondence.

Free Format Text Any text you like can be placed into the system and letters are then automatically printed with that text. The section at the top of the letter (candidate name and date of test) are fixed, and the table at the bottom showing the exams to be taken is fixed. As an example I have also added a line for the parents to sign and to write the total amount they are enclosing for the test.

Yours faithfully,
%%principal_name

Parent's Signature:

Total Amount Enclosed:

SUBMIT SUBMIT+next CANCEL

- Enter the free format text you wish to place in the middle section of the letter, exactly as you wish it to appear
- Click the *SUBMIT* button to save your work

The screen shows 30 lines of text, but the templates allow more lines than this. You can enter more lines than fit on the screen just by continuing to type. If you enter more lines of text than will fit on a single page (according to the Max Free Format (Lines) number on the previous screen) you will receive an error message when you SUBMIT. Simply reduce the number of lines you have entered and click SUBMIT again.

Personalising Letters

The free format text allows you to enter information from the Candidates Section, the School Section or the Exam Session Section to make your letters more professional and personalised.

For example, your Junior letters could refer to each child's name so that instead of writing:

"The tests that your child has been practising for..."

you could write:

"The tests that Julie has been practising for..."

This done by **substituting** items of data within the free format text when the letters are produced. Items to be substituted use special names that all begin with two percentage characters (%%). To achieve the sentence in the example above you would use:

"The tests that %%first_name has been practising for..."

For each letter produced the system will take the actual first name of each candidate and substitute it exactly where the substitution token %%first_name has been used.

Candidate Substitution Tokens

The substitution tokens that can be used relating to a Candidate are listed in the following table. All the data is displayed exactly as stored in the Candidate Section.

Substitution Token	Description
%%first_name	Candidate's first name
%%last_name	Candidate's surname
%%dob_date	Candidate's Date of Birth
%%candidate_pin	Candidate's PIN number
%%school_ref	Candidate's internal school reference number
%%addr_line_1	First line of the candidate's address
%%addr_line_2	Second line of the candidate's address
%%addr_line_3	Third line of the candidate's address
%%town	Candidate's town
%%county	Candidate's county
%%postcode	Candidate's postcode
%%email_addr	Candidate's email address
%%home_telephone	Candidate's home telephone number
%%mobile_telephone	Candidate's mobile telephone number

School Substitution Tokens

The substitution tokens that can be used relating to your School are listed in the following table. All the data is displayed exactly as stored in the School Section.

Substitution Token	Description
%%school_name	The name of the school
%%principal_name	The name of the school principal
%%principal_mem_num	The school principal's IDTA membership number
%%school_addr_line_1	First line of the school address
%%school_addr_line_2	Second line of the school address
%%school_addr_line_3	Third line of the school address
%%school_town	School town
%%school_county	School county
%%school_postcode	School postcode
%%school_email_addr	Email address for the school
%%school_web_addr	School web site address
%%school_telephone	School telephone number

Exam Session Substitution Tokens

The substitution tokens that can be used relating to the exam session are listed in the following table. All the data is displayed exactly as stored in the Exam Session Section.

Substitution Token	Description
%%session_desc	Exam Session description
%%session_date	The date of the exam session
%%examiner	The name of the examiner at the exam session

All substitution tokens must be used exactly as displayed in the tables above and always begin with two percentage characters (%%)

Example

The free format text used to produce the letter shown at the beginning of this guide is:

Dear Parents,

Please note that our next IDTA examination session will take place on %%session_date. Further details, including all individual exam times will be provided nearer the time.

Listed below are details of the test(s) that %%first_name has been practising for. Please tick the column to confirm the exams that you wish %%first_name to take. Please then sign and return this form, enclosing the necessary examination fees.

Cheques should be made payable to '%%school_name'.

Should you have any questions regarding the exam please quote %%first_name's PIN number (%%candidate_pin) in all correspondence.

Any text you like can be placed into the system and letters are then automatically printed with that text. The section at the top of the letter (candidate name and date of test) are fixed, and the table at the bottom showing the exams to be taken is fixed. As an example I have also added a line for the parents to sign and to write the total amount they are enclosing for the test.

Yours faithfully,

%%principal_name

Parent's Signature:

Total Amount Enclosed:

Producing Letters

Typically you will want to produce a letter for each of your candidates taking a test in your exam session. Therefore, it is from within the Exam Session section that you direct the system to print your letters.

- ➔ Go to the Exam Sessions section of the system from the Main Menu and select the exam session that you are working with. Enter the session by clicking the *Session Exam Details* button.

Print Letters Button

You will see the usual screen listing all the candidates and tests within the session

List of Tests by Exam Session							
Session		10 Jul 2009					
Examiner		N/A					
Add New Test		Add Late Entry		Search		Import Exams	
Print Timetable		Enter Results		Manage Payments		Print Letters	
Summary Report							
Selections: select all unselect all locked <input type="checkbox"/>		show 10 show 25 show 50 show 100 (of 6)					
Update		Delete		Print Candidate Report		Print Selections	
Candidate Previous Exams							
Select	Branch	Grade	Candidate	Dance 1	Dance 2	Dance 3	Dance 4
<input type="checkbox"/>	Ballroom	B	Dot Apostrophe	Waltz	Quickstep		
<input type="checkbox"/>	Ballroom	B	Lucille Ball	Waltz	Quickstep		
<input type="checkbox"/>	Ballroom	B	Charlie Chaplin	Waltz	Quickstep		

- ➔ To produce letters for the candidates taking exams within this session press the *Print Letters* button.

Letter Selection

You will now see the Letter Selection screen.

Select Letter for Printing	
Exam Session	Summer Exams 2009
* Select Letter Type	<input type="text"/>
Age Group	<input type="text"/>
Candidate	<input type="text"/>
Award Type	<input type="text"/>
Branch	<input type="text"/>
Grade	<input type="text"/>
SUBMIT	
CANCEL	

- ➔ Choose the type of letter you require from the dropdown list.

The remainder of the items on this screen are optional. If no other items are selected the system will produce one letter for every candidate within the session (providing the template has been set up for the document type and age group as described earlier within this guide).

However, by selecting other items on this screen you can restrict the number of letters produced to the groups that you require. For example, you may only wish to produce letters for your Junior candidates, in which case select Junior in the Age Group field.

You can produce a letter for an individual candidate by selecting the candidate name from the candidate dropdown.

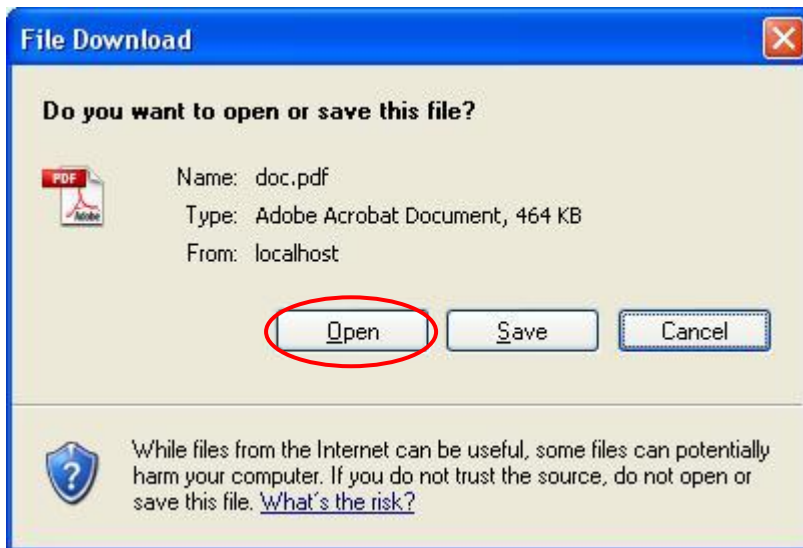
Similarly, you can produce a letter for each of a group of candidates, e.g. all those taking a Ballroom Rosette.

➡ Press the *SUBMIT* button to produce the letters

Note that if you choose a letter type for which you have not set up your free format text, no letters will be produced and the message “Nothing Retrieved from the Database” will be displayed.

Printing

Once the system has prepared the letters (this just takes a few seconds) you will see the file download screen for the letters it has just produced.



➡ Click the Open button

Your letters will now be displayed on the screen. You can preview the letters before sending them to your printer. If you are not happy with the layout, you can return to the Documents Section and make any changes. When you produce the letters again any changes you have made will automatically be reflected in the layout.

➡ Put a stock of plain paper into your printer and Print