SOPHTLOGIC

Communication Administration

User Manual

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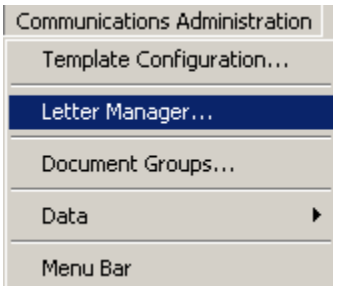
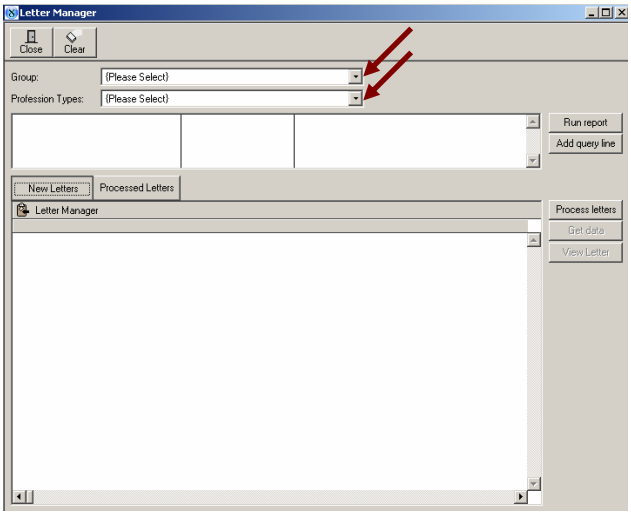
Letter Manager

Letter Manager is used for printing out multiple letters at a time, for example: You can activate a letter by clicking onto Job Letter Template within Work Manager.

- Click onto the Communications Administration
- Click onto Letter Manager



The Letter Manager window will appear

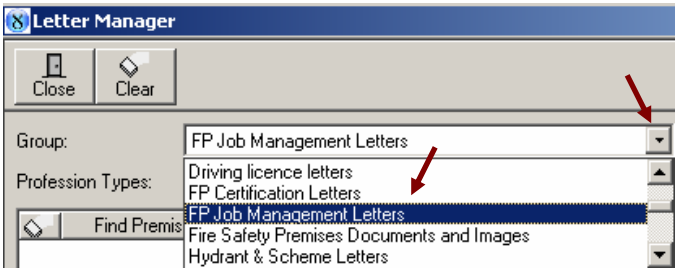


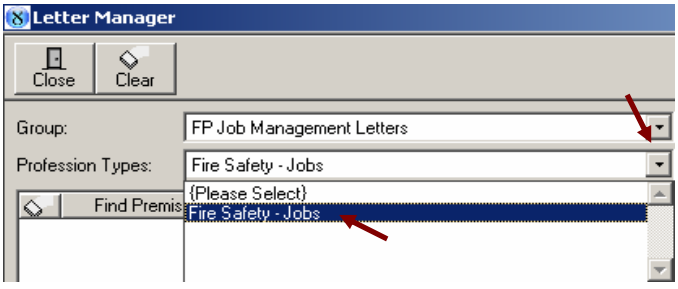
Click onto the arrows and

- Select a Group
- Select a Profession Types

The Group drop down list will have a list of Groups to choose from

- Click onto the Group arrow
- Double Click onto the Group



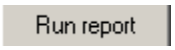


Profession Types are the letters that are within that Group

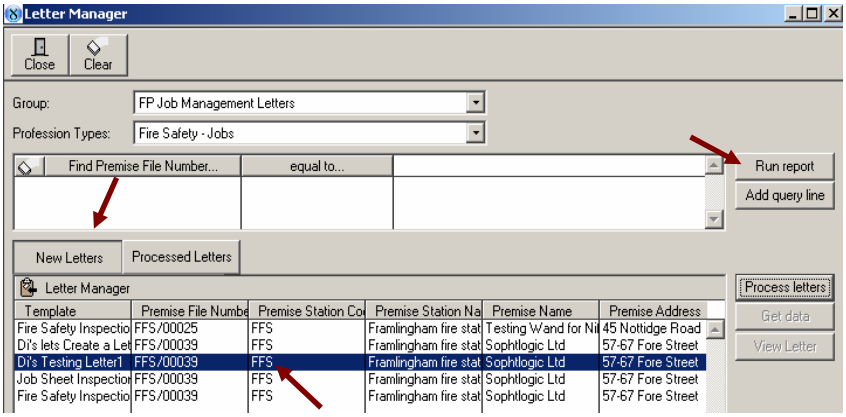
- Click onto the Profession Types Arrow
- Select a Profession Types

Only Jobs with the same template can be printed together

If there is only one ‘Profession Type’ in the list the system will default to that type otherwise there will be a list to choose from Both Groups and Profession Types need to be set up by an engineer as they correspond to parts of the system where the letters functionality has been added.

- Click onto the ‘Run Report’ button 

As you can see all ‘Letters’ that are linked to the Group and Profession Types, will appear under the ‘New Letter’ Tab in the ‘Letter Manager’ window below. As shown.

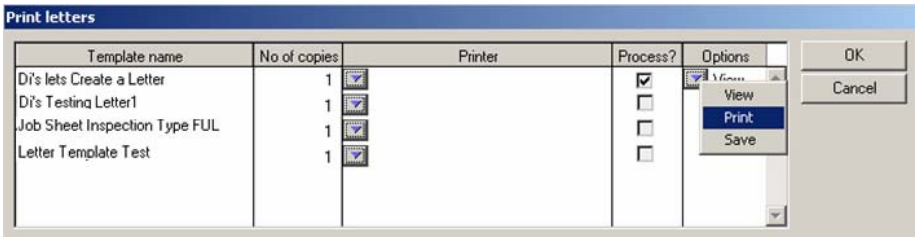


- Click onto the Process Letters button

When you process a letter you will get a dialog box appear ‘Process 1 Letter’ message pop up on the window. If you select Yes, the record will go into the ‘Processed Letters’ tab.

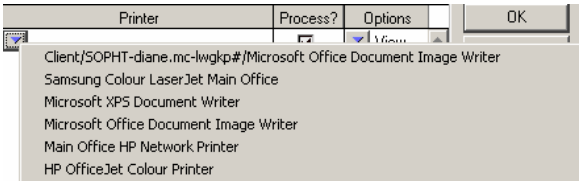
- Click onto the Yes button

A ‘Print Letters’ window will appear with your letter



To Print the letter, firstly you need to select a printer

- Click onto the ‘Printer’ arrow button



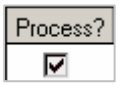
You may have a selection of Printer(s) to choose from – depending on your system –

- Click onto the chosen printer

As you can see the printer is now displayed in the Printer column

To process the letter

- Click into the Process box – a tick will appear in the box

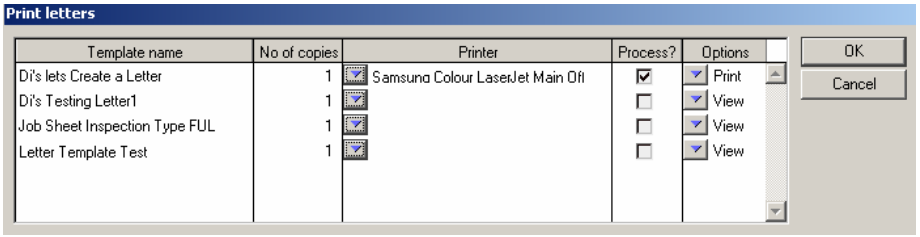


Under the Options column

- Click onto the Options arrow button

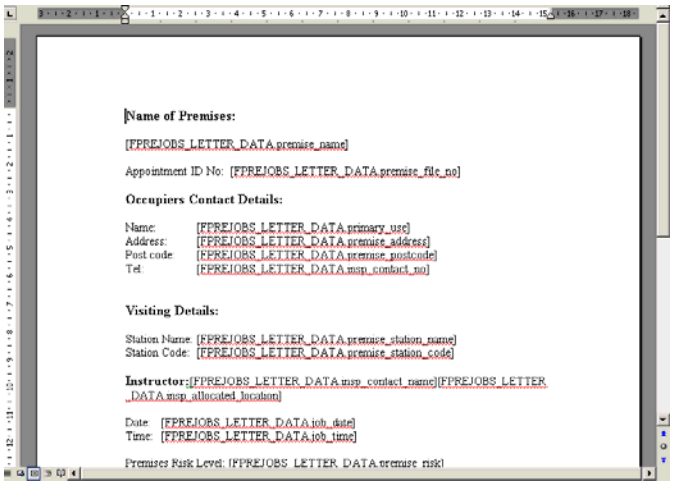
As you can see, you have three options.

View – this lets you preview the letter before printing
Print – this allows you to print the letter
Save – this allows you to save the letter



- Click onto the ‘Print’ arrow button
- Click onto the OK button

The letter will appear in code – as shown -

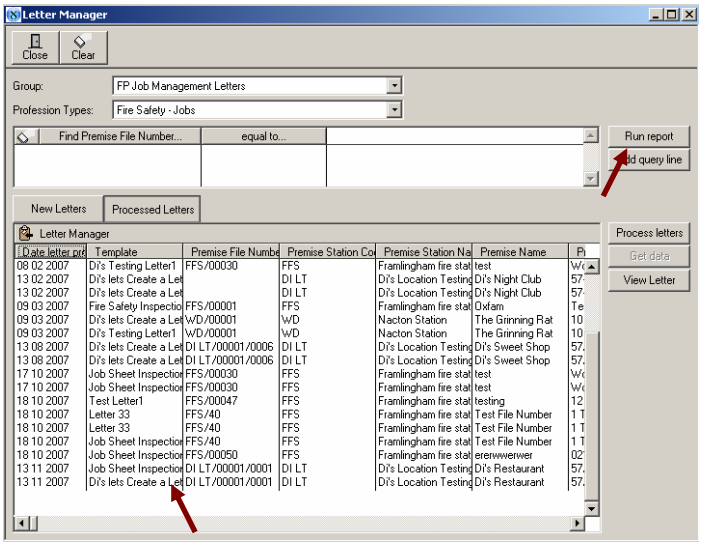


The coding will then start to change to text – as shown

Another dialog box will appear asking if the 'letter is Correct'

- Click onto the Yes button

The Letter will disappear and you will go back to the 'Letter Manager' window.



- Click onto the 'Processed Letter' tab
- Click onto 'Run Report'

Notice the letter you have just 'Processed' has now moved from the 'New Letters' tab window to the 'Processed Letters' window.

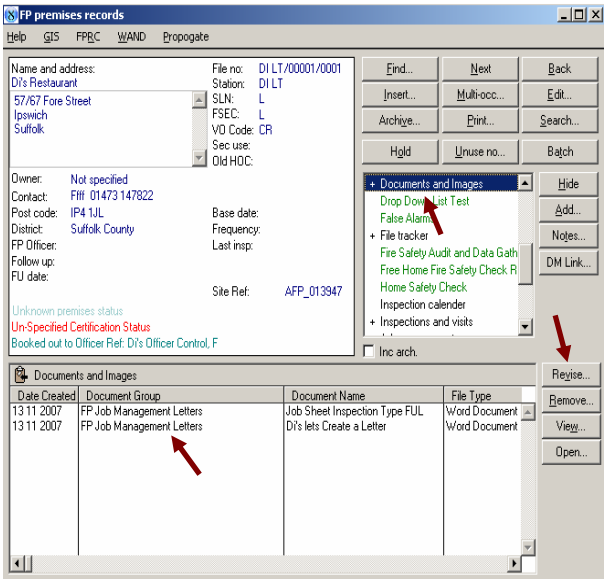
To setup or Amend Letters go to - Communication Administration - Template Configuration – Fire Safety – Jobs Letters (page93)

How to Check Your Letter

A record may also appear in the Document and Images sub option of a record card. E.g. if you print a job sheet template for an inspection and visit, a record will be added to the 'Documents and Images' sub option of the Premises record card, same functionality occurs if you successfully Print a Letter then a record will appear in the 'Documents and Images' sub option in the Personnel Record Card. If you select No, or you don't process a letter i.e at the time of doing a Letter, the record will stay in the 'New Letters' tab.

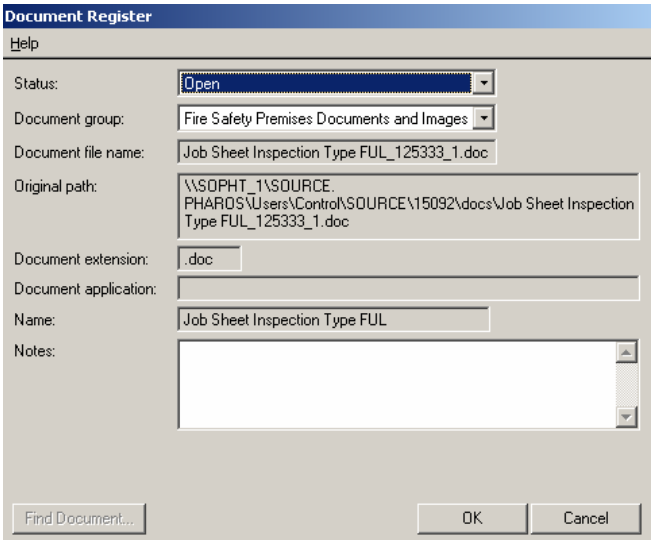
- Click onto Fire Safety
- Click onto FP Premises Record Card

The FP Premises Record Card will appear
In the Sub-menu



- Click onto 'Documents and Images
- Click onto the Show button
- Click onto the letter
- Click onto the Revise button

The Document Register window will open



Information about the letter will appear

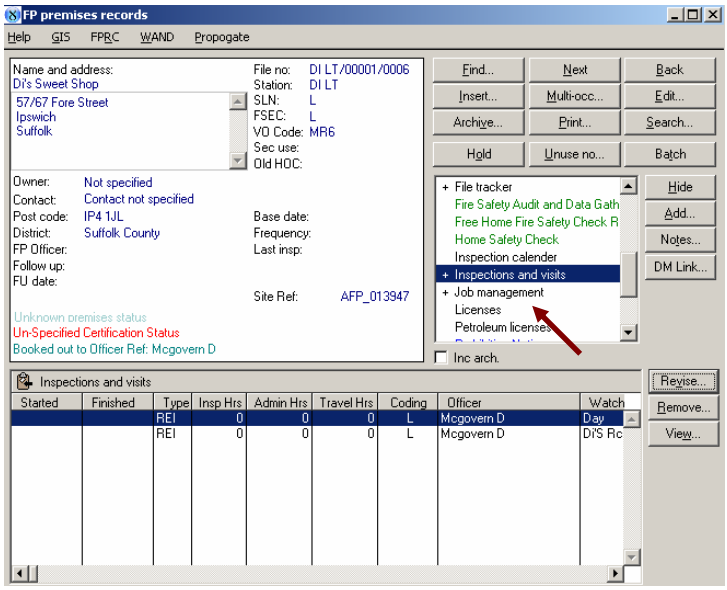
- Click onto the OK button

Another way to check if the letter is coming up in the ‘Print Letter’ options, go to…

Within the FP Premises Record Card

- Click onto the Inspections and Visits sub-option

The Inspections and Visits window will appear



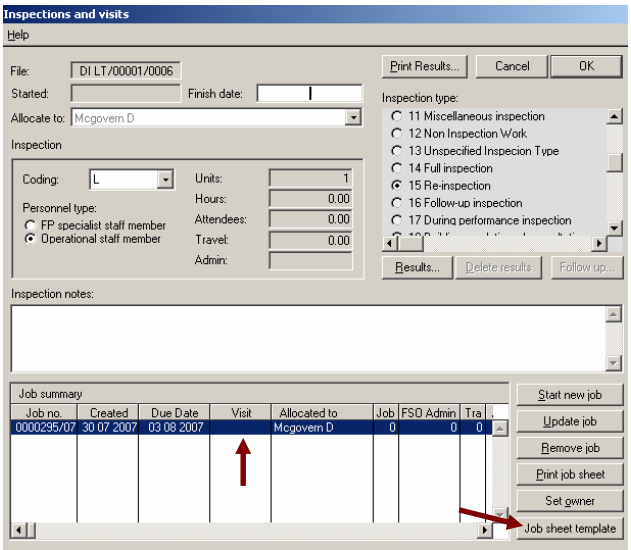
In the Job Summary window

- Click onto the Job
- Click onto the Job Sheet Template button

In the Sub-menu

- Click onto ‘Inspections and Visits’
- Click onto the Show button
- Click and highlight the Job
- Click onto the Revise button

The Inspections and Visits window will appear

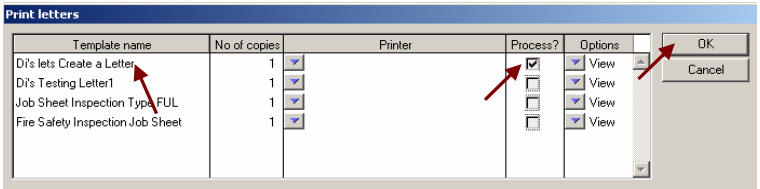


In the Job Summary window

- Click onto the Job
- Click onto the Job Sheet Template button

Print Letters box will open

- Click onto your Template Letter
- Click into the Process box
- Click OK



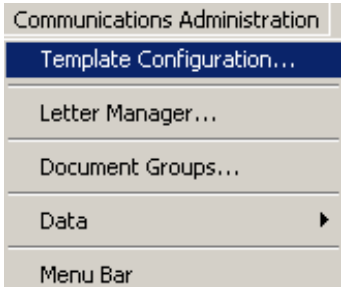
The rest of this process is the same as above.

Communication Administration

This document sets out how to use the SOPHTLOGIC template facility. In various parts of the system, it is possible to set up Microsoft Word Templates to use in conjunction with the SOPHTLOGIC system to enable the user to automatically produce a Word documents containing data held in the MIS database.

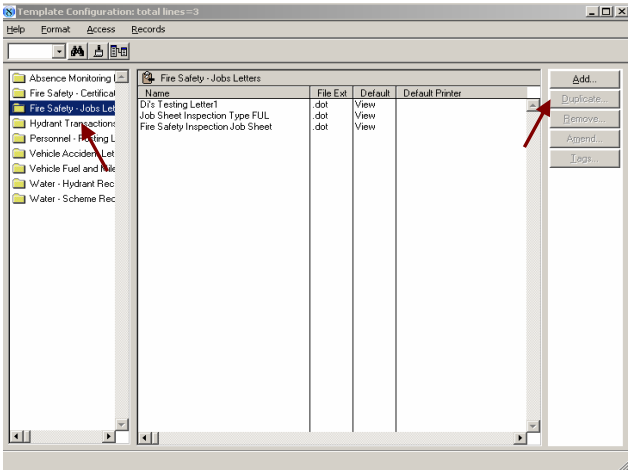
- Go into Global Navigator
- Click onto the Communication Administration

Set Up Fire Safety - Job Letters



- Click onto Template Configuration
- Click onto Fire Safety Job Letters folder

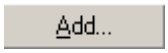
The Template configuration window will appear



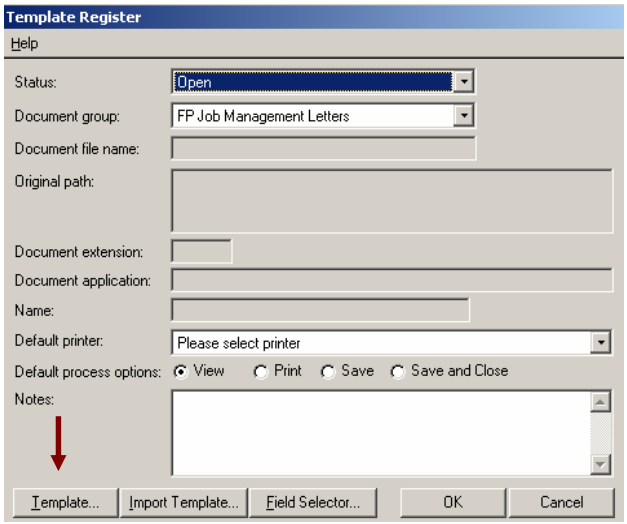
Any information that have previously been entered will appear in the main window.

You can use the existing templates or create your own

- Click onto the Add button

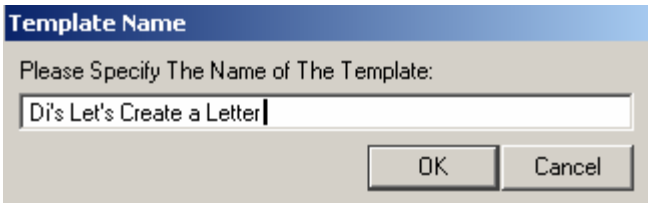


The Template Register window will open



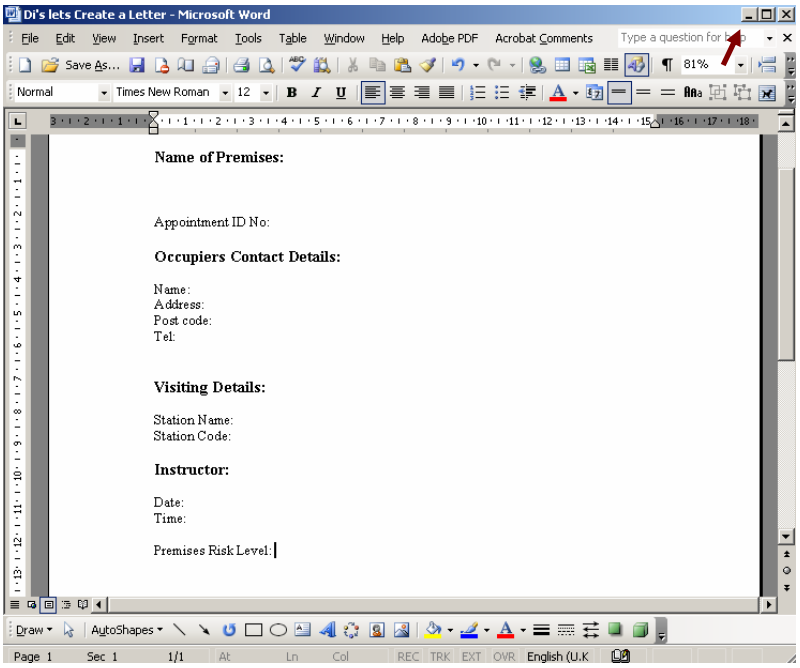
- Click onto the Template Button

A Template Name box will appear



- Enter the Name of your Template Letter
- Click onto the OK button

MS Word will open a blank page



Types out the outline of your letter leaving blanks were you want the Fields to be entered.

Once you have typed out your letter

Do not close this window – to minimise it

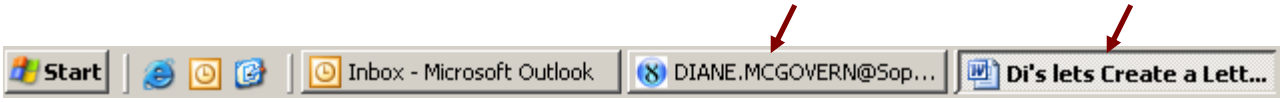
- Click onto the in the top right hand corner

To Enter the Fields

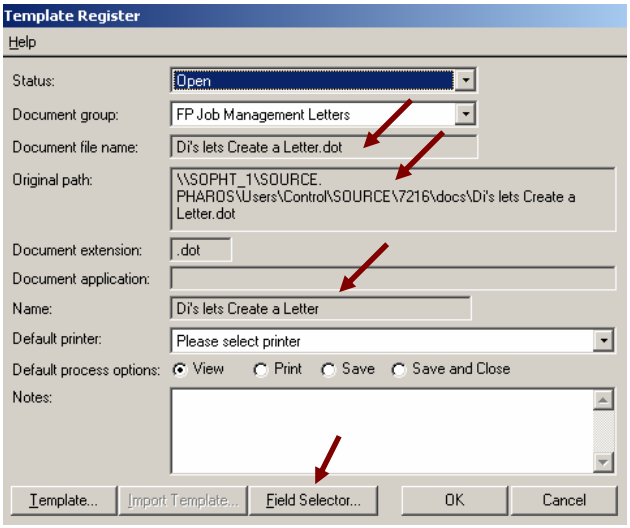
Go back to the Template Register window

- Click onto the PharoS button in the Start toolbar at the button of your screen

The Word screen will disappear to the Start Toolbar at the bottom of your screen

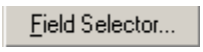


As you can see the link to your Template has been entered in the ‘Original Path’ box

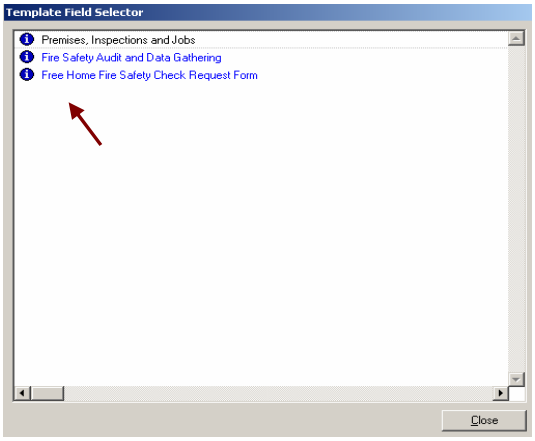


The Name of the Template you are creating has been entered into the ‘Document File Name’ and ‘Name’ box

- Click onto the Field Selector button

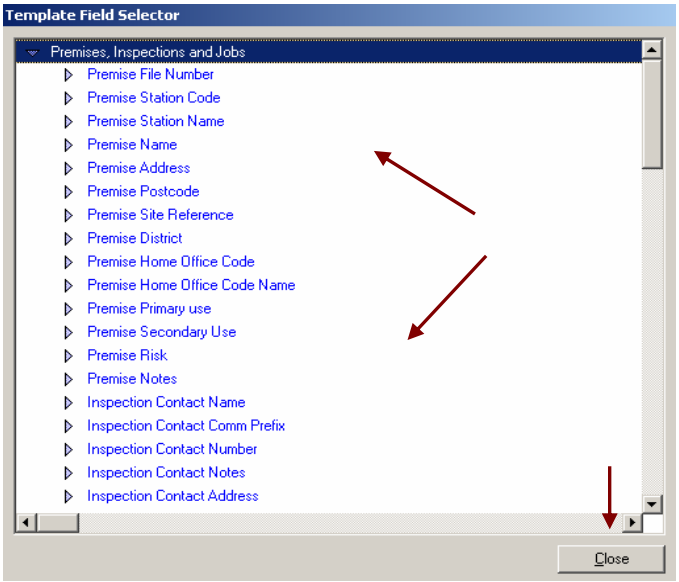


The ‘Template Field Selector’ box will open



- Double Click onto the icon

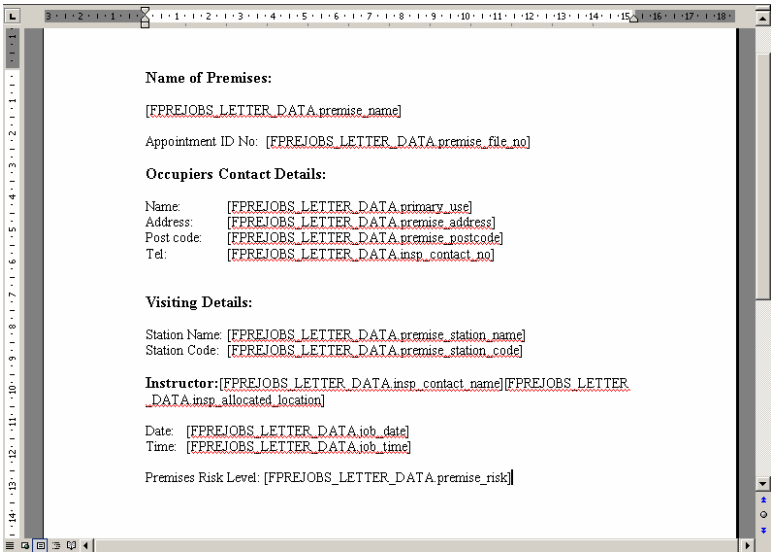
A list of Field Sectors will appear



- The sub-menus will appear
- Double Click onto the Fields that are to be inserted into your Template Letter
- Repeat until letter is completed

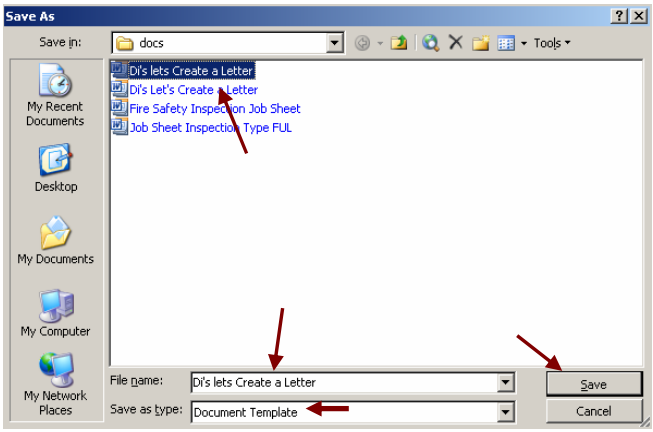
The word screen will appear each time a sub-menu – Field - has been entered.

As you can see the 'Template Letter' is complete. The Fields and the text have been entered.



Remember to put a space between Text and Coding.

Once you have completed creating your Template Letter



- Click onto 'Save As' button in the toolbar

- Click onto the Template you named earlier
- Click onto Save button

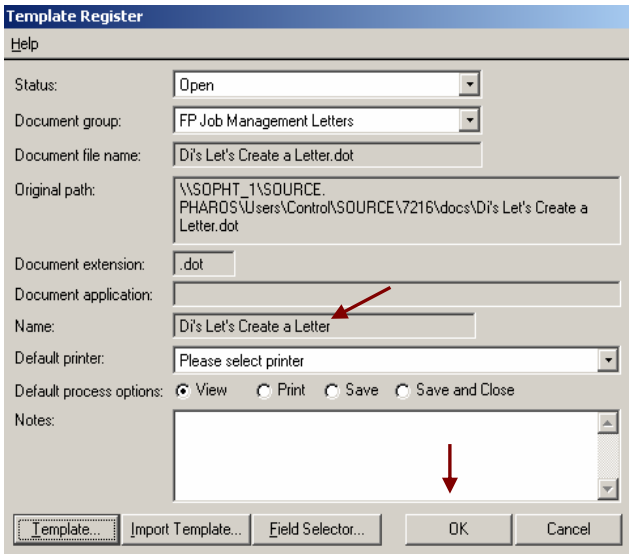
Make sure the 'Save As Type' says 'Document Template' otherwise you will not be able to find the letter

Go back to the Template Register window

As you can see your letter has now been entered into the Template Register

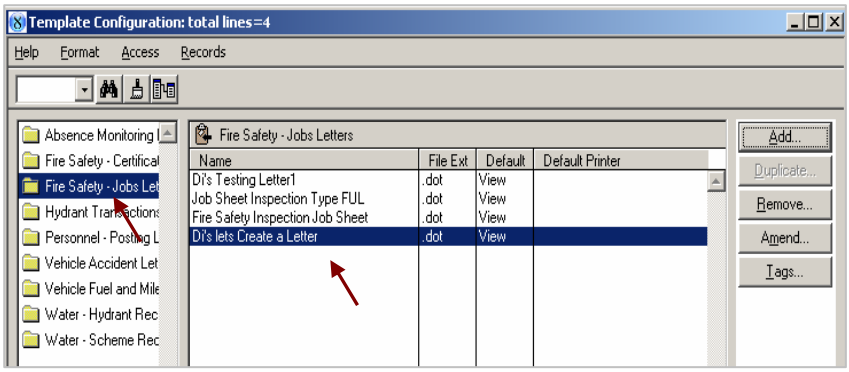
- Click onto the OK button

Notice the Word and Template Register window has now disappeared and returned to the Training Configuration window.



In the Template Configuration Window

- Click onto the Fire Safety – Jobs Letter

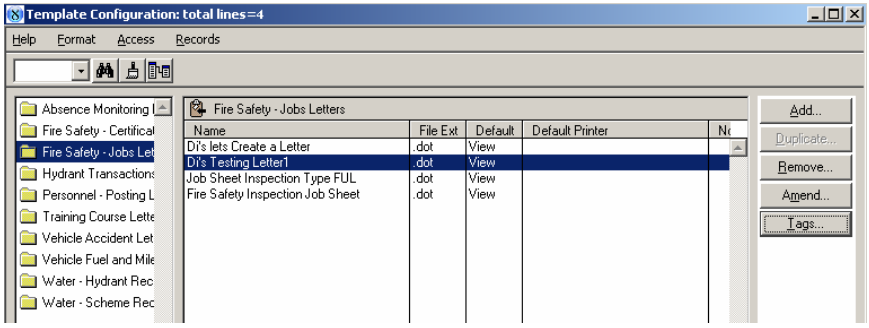


Your letter Template is now in the Fire Safety – Jobs Letters Folder in the Template Configuration

Tags Button

If you want to Tag a Letter Template to a particular Station, Postcode, Status, you need to add a 'Tag Value'. This 'Tag Value' has to be the same coding as what you would use in the FP Premises Record.

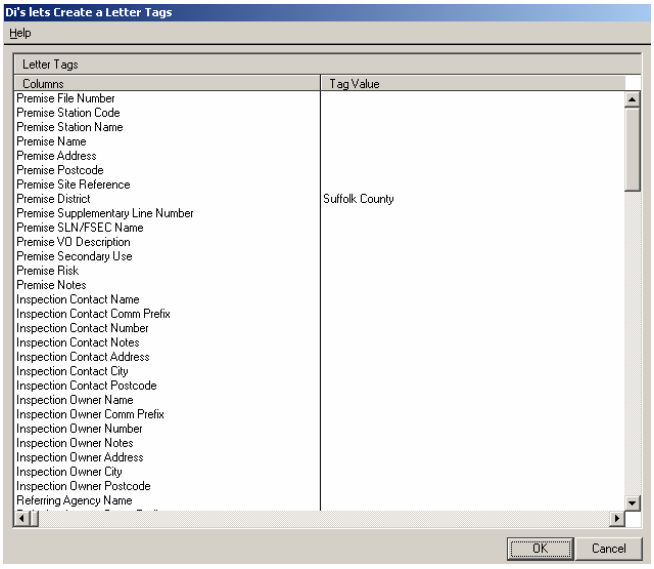
- Select a Letter Template
- Click onto the Tags button



When setting a tag to a letter (tag button) the best fields to tag in FS and Training would be, Fire Safety is probably the inspection types or Premises district, whereas Training possibly Course Code or Rank Type

In the Tag Value column

- Enter the Code
- Click onto the OK button

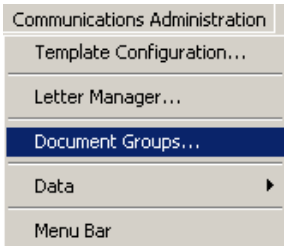


This letter will only activate when a Premises within the 'Suffolk County' is created.

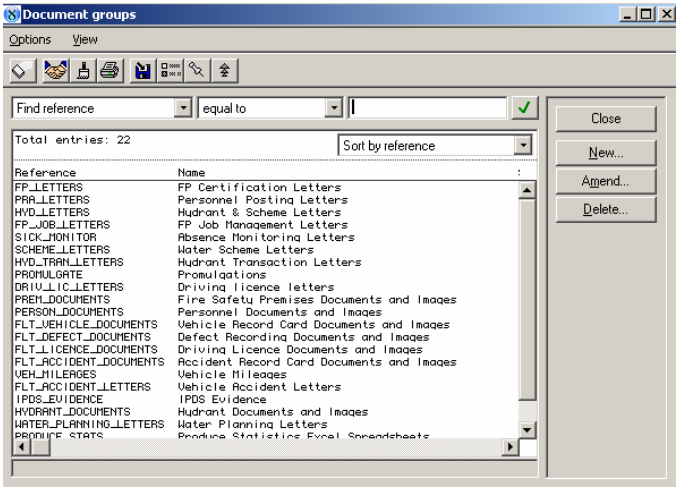
Document Groups

The Document Groups allows you to Just a method of grouping documents together.

- Click onto the Communications Administration
- Click onto Document Groups



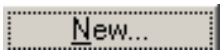
The Document Groups window will appear



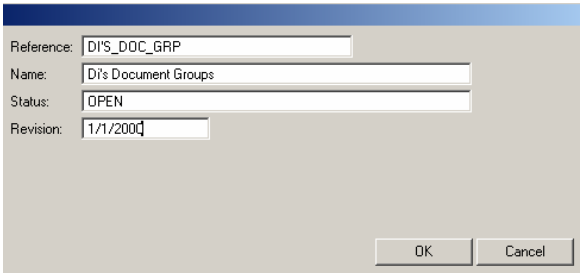
As you can see any pervious entries will appear in the Document Groups window –as shown -

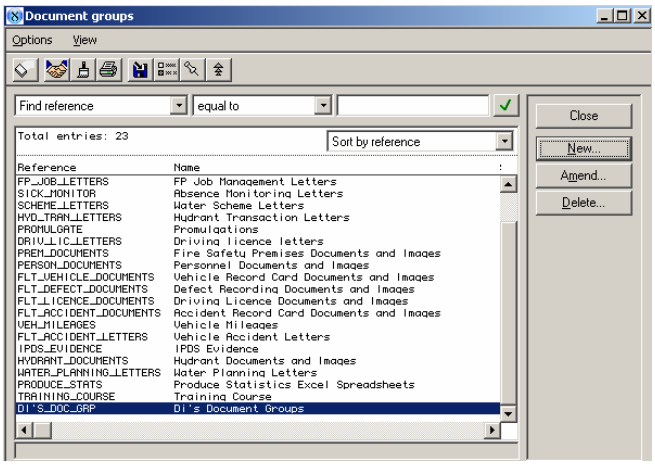
To enter a new Document Group

- Click onto the New button



- Enter a Reference – like a code
- Enter a Description of the Reference
- Status is defaulted to Open
- Enter a date in the Revision box for when you want to review the Document Group
- Click onto the OK button





As you an see the entry you have just created is now in the Document Groups list.

Sophtlogic usually sets Document Groups up for you – this may be privileged access if so please contact your Administrator