RLDatix™

- Letter Builder -

FOR RISKMAN VERSION 2303

Last reviewed April 2023

RLDatix™

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WHAT DOES THE LETTER BUILDER DO?

The letter builder allows you to create highly formatted documents, which when generated based on a single record, can then have information from that record populated automatically at the points you determine. The letter builder is similar in concept to performing a mail merge in programs such as Microsoft Word™.

➔ How to access the Letter Builder

You can access the Letter Builder by navigating to *Administration > Letter Builder.* This will take you to your list of previously saved documents. To create a new document, select the relevant register from the drop-down list then click on the icon.

EXAMPLES

This is an example of a document that was generated using the Letter Builder tool:

DETAILED OVERVIEW

What are the capabilities of the Letter Builder?

The Letter Builder allows you to create a document which can be generated when criteria that you specify has been met. A good example of this in practice could be when a consumer lodges a complaint, and it is entered into RiskMan, an acknowledgement letter for that consumer can be

generated. The letter that you compose can automatically populate information from the recorded complaint, into the produced document; for example, the consumer's name and address, date complaint lodged, etc.

What might the Letter Builder be used for?

Below are some examples of when the Letter Builder might be used:

- To create an acknowledgement letter that is generated when a consumer lodges a complaint
- To create a notification letter for a WHS event based on an employee incident
- As a means of creating your own report form; for example, you could create a document which needs to be printed that details the key information when a critical incident occurs

Formatting capabilities of the Letter Builder

The Letter Builder has a range of familiar formatting capabilities. All functionality for styling and formatting a document is presented in a ribbon-style, similar to the likes of Microsoft Word.

Undo: Features unlimited undo and redo actions. Note that CTRL + Z is also valid for the Undo action.

Clipboard: Standard copy, cut, and paste actions. Note that if you copy formatted text from a word processor such as Microsoft Word, the formatting will be retained in the Letter Builder.

Font: Features all standard text formatting options. Please note that the available fonts cannot be changed.

Paragraph: Features an array of standard paragraph controls, including line spacing, indenting, lists etc.

Styles: There is only limited functionality for styles.

Editing: Contains a Select All tool.

**Pages:** Allows you to enter a page break at the position of the cursor.

Tables: Allows you to create a new table in the size you require. After you create a table, you can format it (adjust column and row widths, colours, etc.) as you normally would with other programs.

Illustrations: Allows you to insert an image where the cursor is. **Note**: You cannot format an image to "float" in a particular position, as you can do with other programs. You can only place an image in line with text, and adjust its size and alignment.

Links: The only functional tool here is the Hyperlink option.

Header & Footer: Allows you to modify header and footer content, as well as enter the automatic content Page Number and Page Count.

Symbols: Allows you to enter a symbol from a chosen font into your document.
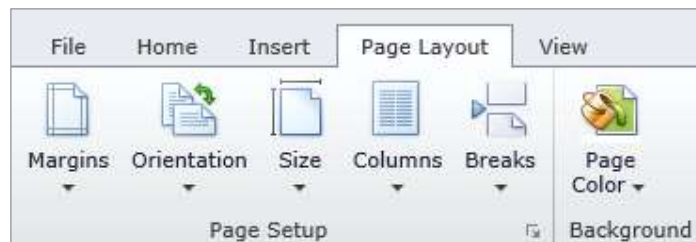
Page Setup: Allows you to control margins, page orientation and size, columns, and also allows you to add breaks other than page breaks to your document.

Background: Allows you to change the background colour of the page.

**Show:** Allows you turn the horizontal ruler on or off. Note there is no vertical ruler available.

View: Lets you edit your document in full screen mode; hides the RiskMan toolbar and also the Letter Configuration panel.

Would you rather work in Microsoft Word?

If you want to create a document which has more advanced formatting than this tool allows, you may wish to work in Microsoft Word first.

Once you have completed the design of your document, click the **Open** button in the **File** group.

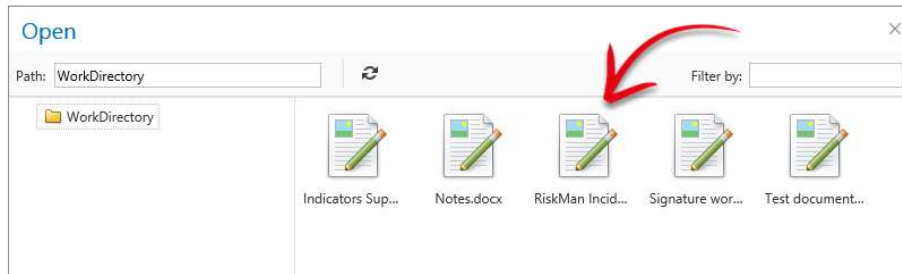You will then need to click the **Browse** button.
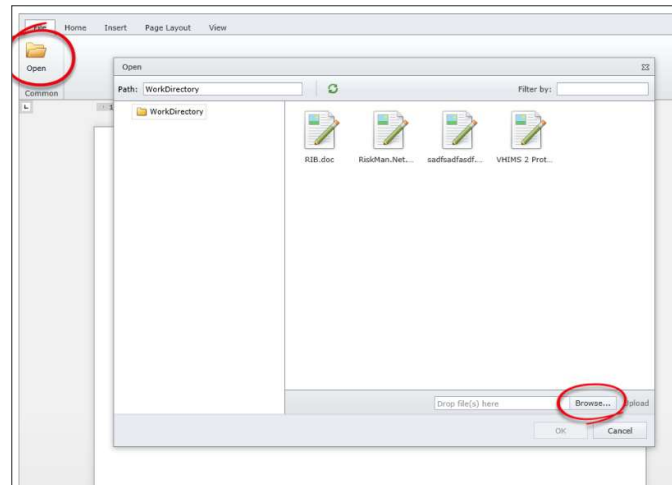
Locate your saved Word document on your computer and click **Open**:
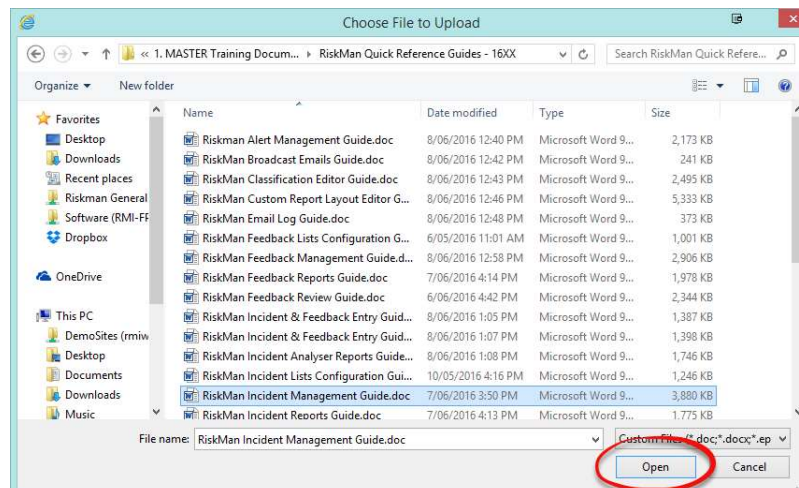
Letter Builder

After an import process runs, your Word document will now be available to use as the basis of your letter:

Select your Word document, click **OK**, and then close the dialog window. You can now modify your document as required (note that some highly-formatted content may not import as expected; this is a limitation of the Letter Builder functionality).

USING THE LETTER BUILDER

The Letter Builder list page

The Letter Builder list page will contain a list of all previously created documents in a listings grid.

1. Select the relevant register for the documents you want to display (incidents, feedback etc.)

2. Click on the ⊞ icon in the toolbar to create a new document

3. Click on the blue **Letter Name** to view and edit the individual document

ⓘ **Note**

The Letter Builder page is just like other listings pages, where you have the ability to group by columns, filter, use your Selection Settings and set your column widths.

ⓘ **Note**

*You must select the applicable register you'll be working from **before** creating a new document. Once you are in the individual document you cannot change register. If you select the wrong register you must exit without saving and create a new document.*

Know what you want to create, before you create it

Whenever you create a new letter, it is a good idea to have an example of what you are seeking to achieve. That way, you have a goal to work towards.
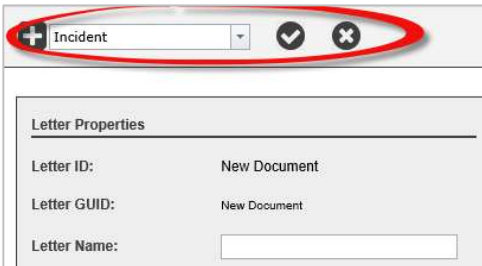
The scenario we are going to use in order to build an example document is receiving a consumer complaint. When we receive a complaint, we want RiskMan to generate a formal letter of acknowledgement, which we can then send to the consumer. This letter will let them know who is in charge of the follow up of their complaint, and some other details.

This is our sample letter (which is currently manually written for each complaint). This is what we are aiming to recreate using the Letter Builder.

General properties of your letter

To save your letter at any stage, click on the ⊘ icon. To exit the individual Letter without saving, click on the ⊗ icon. To create a new letter, select the applicable register and click on the ⊞ icon.

Letter Properties

Letter ID:	New Document
Letter Name:	Complaint Acknowledgment
Selected Register:	Feedback Register

Letter Configuration

This is a :	Parent Document
Use Unposted Record:	☑
Default Document format.	Microsoft Word Document (*.do ▾
Default Filename:	ComplaintAcknowledgement

Letter Properties

Letter ID:	New Document
Letter GUID:	New Document
Letter Name:	

ⓘ **Note**

Once you have entered an individual document, you cannot change the register you're working from without exiting and starting a new letter.

Give your letter an appropriate name in the **Letter Name** field. The **Letter ID** will be automatically generated when you first save the letter.

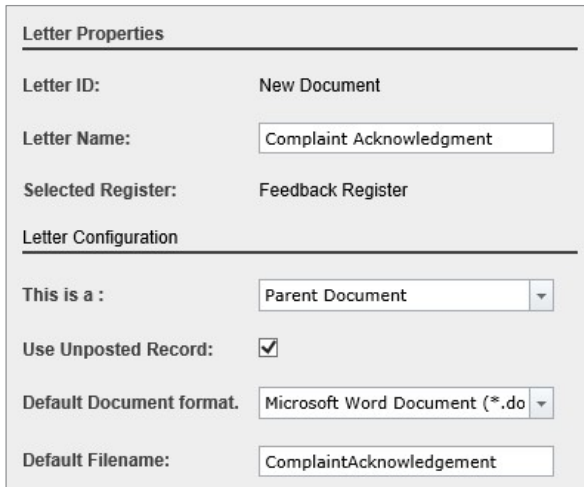**Use Unposted Record:** Allows you to stipulate whether the letter can be generated based on the unposted (i.e. potentially not yet reviewed) version of a record. Leave unchecked to base the letter only on the posted version of the record

ⓘ **Note**

This option will only be displayed when the register you have chosen uses Posting functionality (in most cases, this is just the incident and feedback registers).

Select your preferred document format from the **Default Document format** drop down list. Note that this can be changed later. The available formats are *.doc, *.pdf, and *rtf.

The **Default Filename** field allows you to set what the filename of a letter should be whenever it is generated. Initially, this will contain an automatically generated filename, but as you can see in our example, we want our files to be called "ComplaintAcknowledgement", which would then be modified by the user.

ⓘ **Note**

We have deliberately skipped some options here which will be explained later.

Adding content to your letter

As mentioned previously, if you have any experience using Microsoft Word, the editing tools available in the Letter Builder should be very familiar to you. We are now going to construct the content of our example letter from page 8.

Adding images – in this case, our company logo

The first thing we'll do is add our company logo. Click on the **Insert** tab, then on **Inline Picture**.
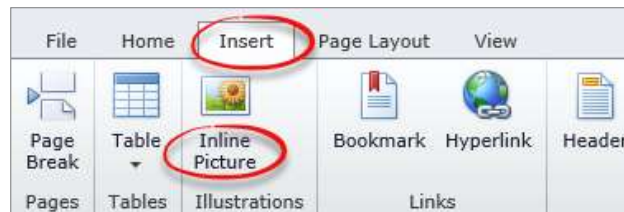
The image we want to use is on our computer, so we will select **From your computer**, and then **Browse**.
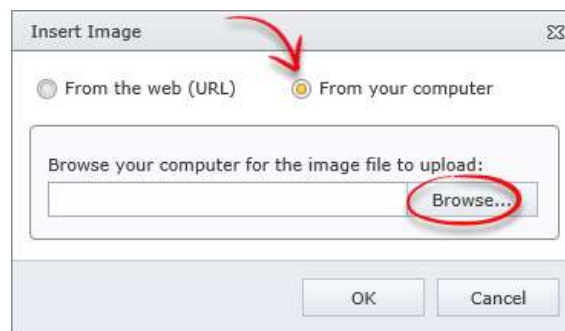
Locate the image file on your computer and click **Open**.

We'll then resize the image so it is appropriate, and we will also right-align it; we'll then add our standard address text:

Making content from the record automatically appear in the letter

At appropriate points, we can have information from the record in question (in this case, a complaint in the feedback register) automatically be added to the letter.
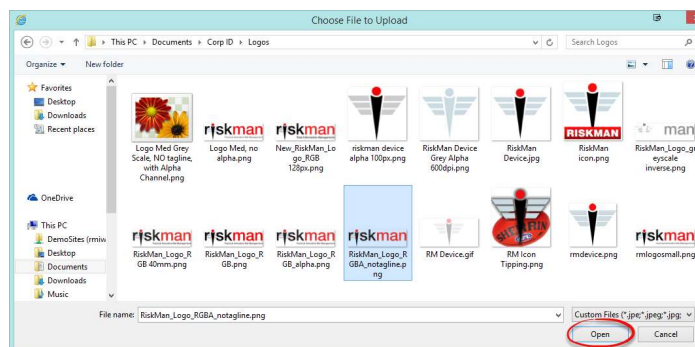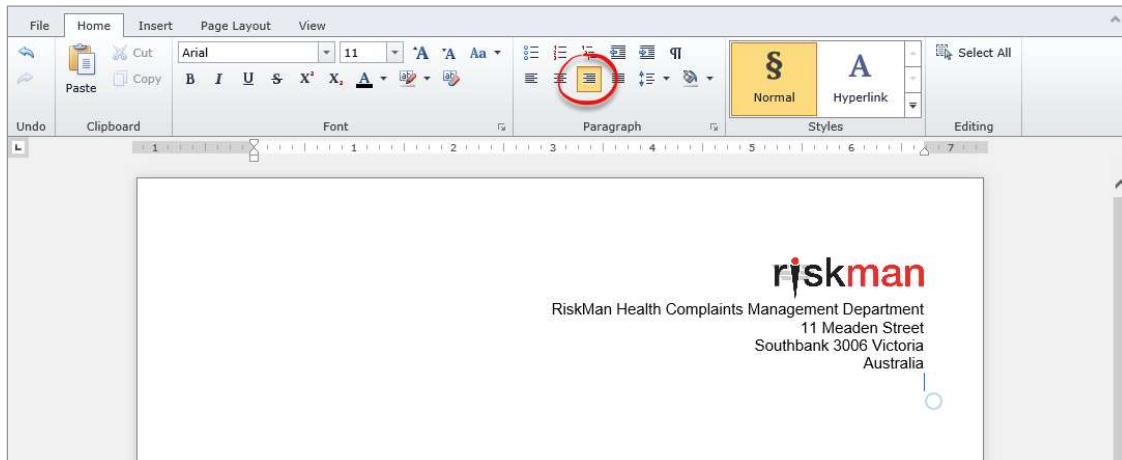
We have reached the first such point: we want the name and address of the person who submitted the complaint to appear.

Step 1: Identify which fields from the form contain the information you want in your letter

It might be a good idea to have two browser windows open; one with the letter builder, and the other with a blank feedback form. This is because you are more likely to know which field you want based on where it is on the form, as opposed to a long alphabetic list.
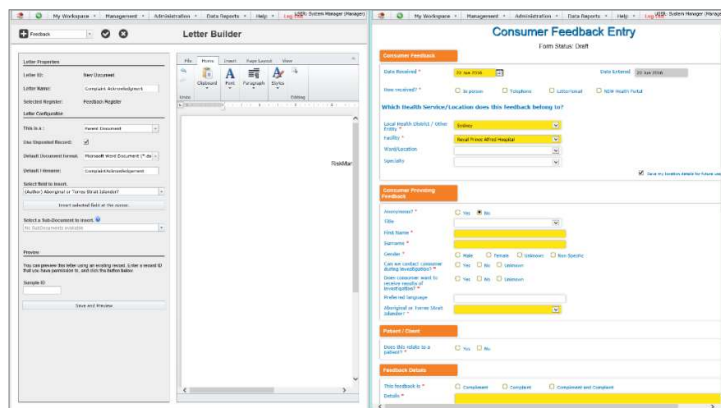
Letter Builder

In this case, the fields we want to appear in our letter are First Name, Surname, Address, Suburb/City, State, and Postcode.

While you're still getting used to which fields are in the system, it might be a good idea to write the names of these fields down, or even mock up where you want the fields to appear on your letter on a piece of paper.

This helps you keep a goal in sight until you are more familiar with building letters and the dataset in each register.

Step 2: Add these 'fields' to your letter

Now we are ready to put those fields into our letter. The first thing to do is place the cursor where the field should go:

Next, from the **Letter Configuration** section on the left, click the **Select field to insert** drop down list (❶)

As shown above, you can either scroll through the list of fields with your mouse scroll wheel, or you can start typing the name of the field you want, and all matching fields will be shown (❷). Once you have found the correct field, click the **Insert selected field at the cursor** button (❸).

The field is inserted where the cursor was. What you can see is a placeholder:

{MERGEFIELD "db field name"}

This is where the value from the field (for example, Jacqueline). For any fields you put in your letter, you will notice that they have a grey background, so that you can easily see which parts of your letter contain fields. Don't worry, when you generate a letter, the actual text will not have a grey background.

Once we add the rest of the fields we identified, so far our letter looks like this:

Notice that in the above screenshot, the placeholder text has gone on to the next line as it was too long – this will probably not be the case when you actually generate a letter!

Step 3: Preview as you go

At any point, you can nominate an existing record to generate your letter, so that you can see if your formatting is correct. This is especially useful in cases that listed above, where you want to make sure the content will appear as you'd expect it to. To do this, you'll need to identify a suitable record, and enter its ID number into the **Sample ID** field, and then click **Save and Preview**.

As you can see in the screenshot on the right, the letter is generating content as we would expect it to.

So with that in mind, we are going to go ahead a enter the rest of our letter content, including field substitutions where necessary.

The end result is as follows:

Once you are happy with your letter you can save it by clicking the icon in the toolbar, and you will be returned to the list of letters.

WORKING WITH SUB DOCUMENTS

What is a sub document?

Sub documents are designed to display information from a record which is either contained in multi-select fields, sub forms, or journals.

When you want to create a letter that is going to contain this information, you need to first create a sub document that arranges the data in the format you want. You would then create the "parent" document, and insert the sub document in it.

In practical terms, it's basically a letter within a letter.

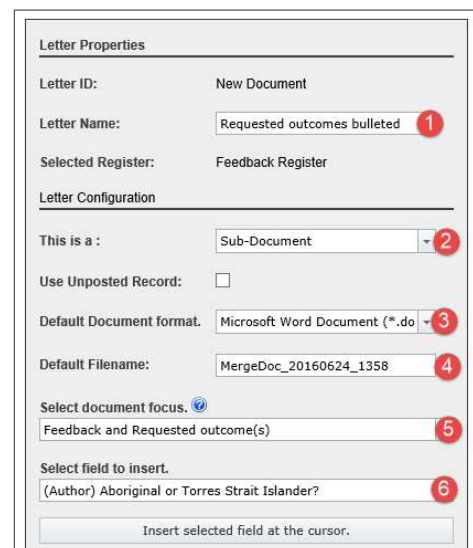## Let's add a sub document to our complaint acknowledgement letter

Our complaint acknowledgement letter is looking good so far. Let's expand the content by

including data from a multi-select field; we're going to add **Requested outcome(s)** (note that the list of available fields will be different for you).

Creating our sub document

The process for creating a sub document is largely the same as a parent document.

❶ Give the sub document an appropriate name

❷ Under Letter Configuration, change the document type from **Parent** to **Sub-Document**

❸ Ensure that the Default Document Format matches that of your parent document

❹ The Default Filename is no longer relevant, because the content of this document will be inserted in the parent document


❺ In the **Select document focus** field, choose the multi-select field (or journals) that you wish to include (Please note that the available fields will vary depending on the chosen register)

❻ You can now add the multi-select field to the body of the document, and apply formatting as required.

The end result in this case is simply the content of the field, and we have set it up as a bulleted list and used italics:
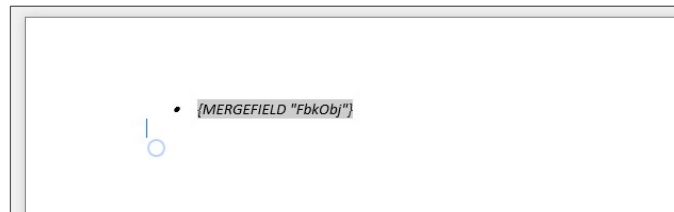

You can still preview the content by entering a sample record ID in the Preview section and clicking Save and Preview.

Once you are happy with the content you can save it by clicking the ✔ icon in the toolbar, and you will be returned to the list of letters.

Adding the sub document to the parent document

From the list of available letters, select the letter you want your sub document to appear in.

The first thing we are going to do is modify the content of the letter appropriately, to accommodate the information that will be displayed from our sub document:
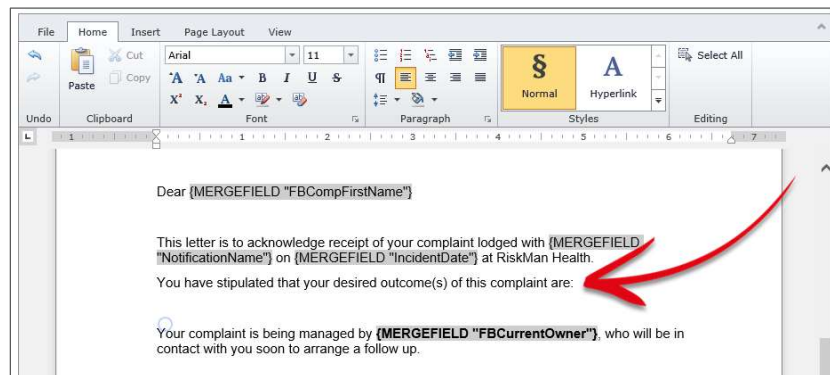
Now, with the cursor in the correct position in the document, we can insert the sub document by choosing it from the **Select a Sub Document to insert** drop down list:

Click the **Insert slect document at the cursor** button, and you will notice a new grey placeholder; this is where the content from your sub document will appear.

> This letter is to acknowledge receipt of your complaint lodged with {MERGEFIELD "NotificationName"} on {MERGEFIELD "IncidentDate"} at RiskMan Health.
>
> You have stipulated that your desired outcome(s) of this complaint are:
>
> {DOCVARIABLE "DOC:21:Requested outcomes bulleted"}
>
> Your complaint is being managed by **{MERGEFIELD "FBCurrentOwner"}**, who will be in contact with you soon to arrange a follow up.

When we preview our letter using the same sample ID as before, this is the end result:

> This letter is to acknowledge receipt of your complaint lodged with Amy Hopkins on 6/6/2016 at RiskMan Health.
>
> You have stipulated that your desired outcome(s) of this complaint are:
>
> - *Apology*
> - *Action to prevent a recurrence*
> - *Compensation/reimbursement*
>
> Your complaint is being managed by **Nick Jones**, who will be in contact with you soon to arrange a follow up.

Example: A sub document containing information from a sub form

The following is a sub form from the feedback form:

Here is an example of the configuration of the sub document:

Now we have inserted the sub document into the parent document:
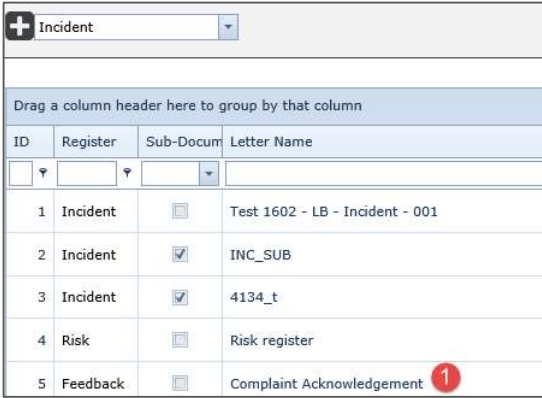

And finally, sample output:

GENERATING A LETTER

How to allow other users to generate the letter?

Once you save a letter, youre able to add the letter to any "list page" for the ability to generate a letter based on any record. All users will have access to generate the letter you save if they have access to the list you save the letter in. To generate a letter, you navigate to the respective list page of records. For this example of how to make the letter available to other users, I will assume that you have a complaint acknowledgement letter to be stored in the posted Feedback list.

ⓘ Note

If the letter is available for one user, it is available for all users who can access the same list page. There is a limitation that you do not have the option to select a template of users to specify who can generate a letter. The letter is stored in its respective list page and those with access to that list page will be able to generate that letter.
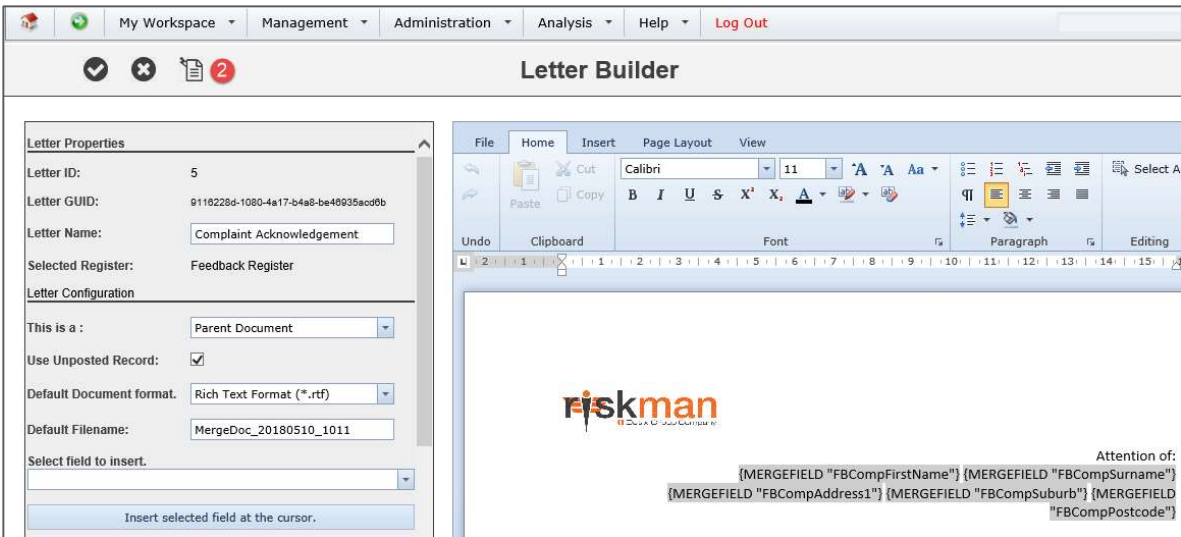
Navigate to *Administration> Letter Builder* to access the list of pre-created letters

❶ Click the **Letter Name** to open the letter

Letter Builder

❷ Click the 🗎 icon

❸ Button Title: Enter the name of the letter. This will be visible to all users with access

❹ Button For: Where will this letter be accessed? What list page in RiskMan

❺ Save or disguard the changes

Now the letter is available in the list page selected. For this example, the letter has been saved in the **Posted Items** page.

If you want to remove a letter in this Posted Items page, repeat steps ❶ and ❷ and click the 🗑 button

Letter Builder

Now to access the saved letter, navigate to *Management > Enquiery > Posted Feedback*

❶ Click on the record you want to generate the letter for. You can select more than one record at a time to generate multiple letters

❷ Click the 📄 icon

❸ Click the name of the letter you want to generate

You're able to select more than one record at a time to generte the same letter.

ADMINISTRATION OF THE LETTER BUILDER

There are permissions for the Letter Builder for each individual register:

Register tab (e.g. incidents) > **Management Permissions**

- Can Create and Edit Letter Builder items

ADDITIONAL INFORMATION & TIPS

Please note that at this stage, individual letters are not "permissioned"; meaning that for example if you create a letter for say, the incident register, then all other users with permission to create letters for the incident register will be able to see and modify your letter.

For this reason we recommend only granting users of a reasonably high level of access permission to create letters.

RELATED TOPICS

Alerts

RELATED TOPICS