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# - Letter Builder -

FOR RISKMAN VERSION 2303

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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<sup>™</sup>.

#### → 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 **E** icon.

## **EXAMPLES**

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

			Wet
		rje	skma
	RiskMan Health C		nent Departm 1 Meaden Str ank 3006 Victo Austra
John Citizen			
47 Hopkins Road			
Manly NSW 2095			
Dear John			
This letter is to ac RiskMan Health.	knowledge receipt of your complaint lodged w	ith Amy Hopkins on	6/6/2016 at
You have stipulat	ed that your desired outcome(s) of this comple	aint are:	
<ul> <li>Apology</li> </ul>			
Action to n	revent a recurrence		
Action to p	revent a recurrence		
	revent a recurrence ion/reimbursement		
Compensat	ion/reimbursement		
Compensat The following are	ion/reimbursement the actions associated with your complaint:	Responsible Person	Status
Compensat	ion/reimbursement	Responsible Person	Status Closed
Compensat The following are Related Issue Car parking	ion/reimbursement the actions associated with your complaint: Description Relimburse patient for the parking fine they obtained due to process taking longer than expected Organise mediation session with patient and spouse to		Closed
Compensat     The following are     Related Issue     Car parking     Incorrect/Inadequate     information     Your complaint is     follow up.	ion/reimbursement the actions associated with your complaint: Description Relimburse patient for the parking fine they obtained due to process taking longer than expected Organise mediation session with patient and spouse to discuss and explain the breakdown of communication which occurred during their visit being managed by Nick Jones, who will be in	Nick Janes	Closed Open Doon to arrange
Compensat     The following are     Related Issue     Car parking     Incorrect/Inadequate     information     Your complaint is     follow up.	tion/reimbursement the actions associated with your complaint: Description Reimburse patient for the parking fine they obtained due to process taking longer than expected Organise mediation session with patient and spouse to discuss and explain the breakdown of communication which occurred during their visit being managed by Nick Jones, who will be in a contacted directly on 96860009, should you	Nick Janes	Closed Open Doon to arrange
Compensat     The following are     Related Issue     Car parking     Incorrect/Inadequate     information     Your complaint is     follow up.     Nick Jones can bo	tion/reimbursement the actions associated with your complaint: Description Reimburse patient for the parking fine they obtained due to process taking longer than expected Organise mediation session with patient and spouse to discuss and explain the breakdown of communication which occurred during their visit being managed by Nick Jones, who will be in a contacted directly on 96860009, should you	Nick Janes	Closed Open Doon to arrange
Compensat     The following are     Related Issue     Car parking     Incorrect/Inadequate     information     Your complaint is     follow up.     Nick Jones can be     complaint in further	tion/reimbursement the actions associated with your complaint: Description Reimburse patient for the parking fine they obtained due to process taking longer than expected Organise mediation session with patient and spouse to discuss and explain the breakdown of communication which occurred during their visit being managed by Nick Jones, who will be in a contacted directly on 96860009, should you	Nick Janes	Closed Open Doon to arrange
Compensat     The following are <u>Related Issue     Car parking     Incorrect/Inadequate     information     Your complaint is     follow up.     Nick Jones can be     complaint in further     Regards, </u>	ion/reimbursement the actions associated with your complaint: Description Reimburse palient for the parking fine they obtained due to process taking longer than expected Organise mediation session with patient and spouse to discuss and explain the breakdown of communication which occurred during their visit being managed by Nick Jones, who will be in a contacted directly on 96860009, should you ar detail.	Nick Janes	Closed Open Doon to arrange

## **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.

File	Home Insert	Page Layout View			
8 8	Paste Cut	Calibri $\bullet$ 11 $\bullet$ $\bullet$ A     A a $\bullet$ B     I     U     S     X <sup>2</sup> X, A $\bullet$ $\bullet$ $\bullet$	E E E E E E E E E E E E E E E E E E E	<b>S</b> A	Select All
Undo	Clipboard	Font 52	Paragraph T <sub>2</sub>	Styles	Editing

**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.

File	Home	Insert	Page Layout	View					
							#	#	Ω
Page Break	Table	Inline Picture	Bookmark	Hyperlink	Header	Footer	Page Number	Page Count	Symbol
Pages	Tables	Illustrations	Lin	iks		Header	& Footer		Symbols

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

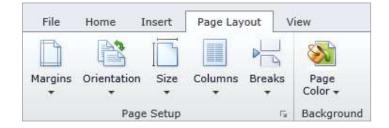
**Tables:** Allows you to create a new table in the size you require. After you create a table, you can format it (adjust column and row widths, colours, etc.) as you normally would with other programs.

**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.

lome	Insert	Page Layout	View
1.000			
	Full	Full Screen	Full Screen

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.

xen	Open		٤
mmon	Path: WorkDirectory	0	Filter by:
	3 🔐 WorkDirectory	RIB.doc Reidfan.Net	sadhadfasff VHINS 2 Prot
			Drop file(s) here

Locate your saved Word document on your computer and click **Open**:

🕤 🕣 🔻 🕇 🕌 « 1. M	//ASTER Training Docum	rence Guides - 16XX	V 🖒 Searc	h RiskMan Quick R	efere 🔎
Organize 🔻 🛛 New folde	r				
☆ Favorites	Name	Date modified	Туре	Size	
E Desktop	💼 Riskman Alert Management Guide.doc	8/06/2016 12:40 PM	Microsoft Word 9	2,173 KB	
Downloads	💼 RiskMan Broadcast Emails Guide.doc	8/06/2016 12:42 PM	Microsoft Word 9	241 KB	
3 Recent places	💼 RiskMan Classification Editor Guide.doc	8/06/2016 12:43 PM	Microsoft Word 9	2,495 KB	
🧜 Riskman General	💼 RiskMan Custom Report Layout Editor G	8/06/2016 12:46 PM	Microsoft Word 9	5,333 KB	
Software (RMI-FF	💼 RiskMan Email Log Guide.doc	8/06/2016 12:48 PM	Microsoft Word 9	373 KB	
😌 Dropbox	💼 RiskMan Feedback Lists Configuration G	6/05/2016 11:01 AM	Microsoft Word 9	1,001 KB	
	💼 RiskMan Feedback Management Guide.d	8/06/2016 12:58 PM	Microsoft Word 9	2,906 KB	
laneDrive	💼 RiskMan Feedback Reports Guide.doc	7/06/2016 4:14 PM	Microsoft Word 9	1,978 KB	
	RiskMan Feedback Review Guide.doc	6/06/2016 4:42 PM	Microsoft Word 9	2,344 KB	
🖳 This PC	💼 RiskMan Incident & Feedback Entry Guid	8/06/2016 1:05 PM	Microsoft Word 9	1,387 KB	
👤 DemoSites (rmiw	💼 RiskMan Incident & Feedback Entry Guid	8/06/2016 1:07 PM	Microsoft Word 9	1,398 KB	
🚂 Desktop	💼 RiskMan Incident Analyser Reports Guide	8/06/2016 1:08 PM	Microsoft Word 9	1,746 KB	
Documents	💼 RiskMan Incident Lists Configuration Gui	10/05/2016 4:16 PM	Microsoft Word 9	1,246 KB	
📕 Downloads	RiskMan Incident Management Guide.doc	7/06/2016 3:50 PM	Microsoft Word 9	3,880 KB	
👪 Music 👻	RiskMan Incident Reports Guide.doc	7/06/2016 4:13 PM	Microsoft Word 9	1.775 KB	
File na	me: RiskMan Incident Management Guide.doc		Y Cust	om Files /* doc:*.d	ocx*.ep v

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

Open					>
Path: WorkDirectory	e		K	Filter by:	
🛅 WorkDirectory	Indicators Sup	Notes.docx	RiskMan Incid	Signature wor	Test document

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).

My Worksp	ace • Management • Ad	ninistration • Reports • Help • Log Out	USER: System Manager (M.
Incident	• • •	Letter Builder	
etter Properties	New Document	File Home Insert Page Layout	View
etter Name: elected Register:	Incident Register	Open Common	4 ] 5 ] 6 ] 7
etter Configuration his is a : Ise Unposted Record:	Parent Document *	RISKMAN REI	FERENCE GUIDE TO INCIDENT MANAGEMENT
Default Document format.	Rich Text Format (*.rtf)	Introduction	Reviewing & Posting Unposted Incidents
efault Filename: elect field to insert. AV#1) Acceptable Variation	MergeDoc_20160614_1222	This reference guide is aimed at Ris/Quality Managers and/or OHS Managers who are responsible for ensuring incidents have been followed up by the respective Line Managers, and to post incidents ready for reporting What is "postine"?	If you know the ID of the Incident you can use the "Go To" function to locate the incident 1. Press the income in the menu or press ALT-G 2. Select Item = Incident and enter the ID
	ected field at the cursor.	What is possing r Posting means a "master" of the "official" version of the Incident is created. There is only ONE master version for each Incident created in BisMan. This" "master" version is referenced on all incident Reports.	A. Press Enter or the Go button     Hryou have permission to the incident it will open     To the second seco
Insert selecte	ed document at the cursor.	Role of the Risk/Quality Manager When an incident is entered by a staff member, it is the responsibility of their Line Manager to review the incident and report their findings. It is then the responsibility of the	
	sing an existing record. Enter a record I	Risk/Quality Manager to ensure they review the details of the incident and to:	To review an unposted incident From the menu select Management -> Inbox -> Incidents. This will display a list of incidents that you have permission to
at you have permission to, mple ID	and click the button below.	Check the Review History to see who else is aware of the incident     Create a Distribution List if others need to be informed of the incident	View e.g. via an alert
Sa	ave and Preview	Optional: Bookmark the incident if you wish to enable a quick return to the incident     Check the incident has been investigated and ensure the	

## 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.

	cident		· <b>V</b>	Letter Builder				\$
	ı column hea	ader here to gr	oup by that column					
D	Register	Detail Doc	Letter Name	Doc Size(KB)	Created By	Creation Date	Last Edited By	Last Edited
						-		,
1	Incident		WHS Letter 3	8	Manager	06 May 2016 10:02	Manager	10 Jun 2016 15:23
2	Incident		Complaint acknowledgement	8	Manager	09 May 2016 15:07	Manager	10 Jun 2016 15:23
3	Incident	~	Compliment acknowledgement	8	Manager	09 May 2016 15:09	Manager	10 Jun 2016 15:23
4	Incident		Obituary letter	8	Manager	09 May 2016 15:11	Manager	10 Jun 2016 15:24
5	Incident		Notification of Incident	82	Manager	30 May 2016 10:21	Manager	10 Jun 2016 15:24
6	Incident		Audit	2786	Manager	30 May 2016 10:47	Manager	10 Jun 2016 15:25
Z	Incident		Notification of OH&S Incident	38	Manager	30 May 2016 11:57	Manager	10 Jun 2016 15:25
8	Incident		Notification of Quality Activity	8	Manager	30 May 2016 17:24	Manager	10 Jun 2016 15:28
9	Incident		Health Legal Legislative Compliance	8	Manager	01 Jun 2016 10:37	Manager	10 Jun 2016 15:28
10	Incident		Notification of Risk Entry	8	Manager	07 Jun 2016 12:05	Manager	10 Jun 2016 15:29

- 1. Select the relevant register for the documents you want to display (incidents, feedback etc.)
- 2. Click on the **D** icon in the toolbar to create a new document
- 3. Click on the blue Letter Name to view and edit the individual document

#### (i) 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.

#### i) 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.

	<b>RiskMan Health Complaints Management Department</b> 11 Meaden Street Southbank 3006 Victoria Australia
Jacqueline Morris 27 Downtha Road Cheltenham VIC 3192	
Dear Jacqueline	
This letter is to acknowledge recei 2016 at RiskMan Health.	ipt of your complaint lodged with Amy Diggins on 21 Jun
Your complaint is being managed arrange a follow up.	by Justin Malone, who will be in contact with you soon to
Justin Malone can be contacted di aspect of your complaint in further	irectly on 9686 0009, should you wish to discuss any r detail.
Regards,	
Sand Sult	
Client Liaison Officer	
RiskMan Health	

Letter Builder

#### General properties of your letter

To save your letter at any stage, click on the  $\checkmark$  icon. To exit the individual Letter without saving, click on the  $\bigotimes$  icon. To create a new letter, select the applicable register and click on the



Incident	- • •
etter Properties	
etter ID:	New Document
Letter GUID:	New Document
Letter Name:	

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

#### i) 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

#### i) 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.

#### i) 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.



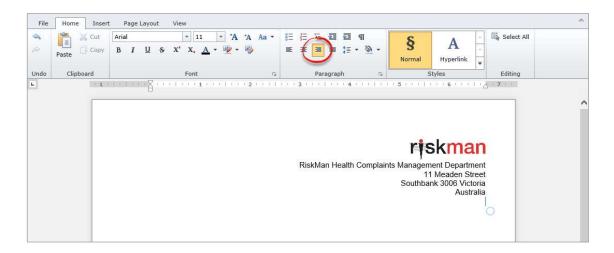
The image we want to use is on our computer, so we will select **From your computer**, and then **Browse**.

2	841 B.
From the web (URL)	) From your computer
Browse your computer for the	
Browse your computer for the	image file to upload: Browse
Browse your computer for the	
Browse your computer for the	

Locate the image file on your computer and click **Open**.

<b>e</b>				Choose	File to Upload				6	
😧 🏵 👻 🕇 🐌	Thi	s PC + Documents	F Corp ID → Logos				~ C	Search Logos		P
Organize - New	folder								E • 🗖	6
★ Favorites ■ Desktop B Downloads ■ Recent places	^		r <b>i</b> skman	riskman	Ŧ	Ţ	Ţ.	RISKMAN	14 <sup>1</sup> 6 1	nar
	l	Logo Med Grey Scale, NO tagline, with Alpha Channel.png	Logo Med, no alpha.png	New_RiskMan_Lo go_RGB 128px.png	riskman device alpha 100px.png	RiskMan Device Grey Alpha 600dpi.png	RiskMan Device.jpg	RiskMan icon.png	RiskMan_L eysca inverse	le
CneDrive CneDrive This PC DemoSites (rmin		r <b>i</b> s <u>kman</u>	r <b>i</b> skman	r <b>i</b> skman	riskman		<b>F</b>	Ţ.	riskn	nai
Desktop		RiskMan_Logo_R GB 40mm.png	RiskMan_Logo_R GB.png	RiskMan_Logo_R GB_alpha.png	RiskMan_Logo_R GBA_notagline.p ng	RM Device.gif	RM Icon Tipping.png	rmdevice.png	rmlogosm	all.pn
Downloads Music	~									
1	-ile na	me: RiskMan_Logo_F	IGBA_notagline.png					Custom Files ( Open	*.jpe;*.jpeg;*.j Cano	

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:



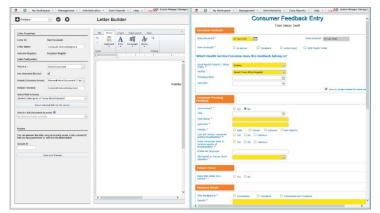
## Making content from the record automatically appear in the letter

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.



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

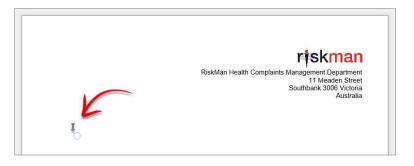
While you're still getting used to which fields are in the system, it might be a good idea to write the names of these fields down, or even mock up where you want the fields to appear on your letter on a piece of paper.

Consumer Providing Feedback		
Anonymous? * Title	Ves No	
First Name *		
Surname *		
Gender *	Male Female O Unknown O Non Specific	
Can we contact consumer during investigation? *	Ves O No O Unknown	
Preferred Contact Method during investigation *	O Meeting O Telephone O Mail	O Email
Does consumer want to receive results of investigation? *	Yes O No O Unknown	
Preferred Contact Method for	O Meeting O Telephone O Mail	O Email
Address *		
Suburb/City *		
Postcode		
State *		

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 (**0**)

etter Configuration		Letter Configuration			Letter Configuration	3
his is a : Parent	Document	This is a :	Parent Document	•	This is a :	Parent Document
Ise Unposted Record:		Use Unposted Record:	$\mathbf{\nabla}$		Use Unposted Record:	
Default Document for nat. Micros	oft Word Document (*.c	lo 👻 Default Document forma	at. Microsoft Word Document	(*.do 🔫	Default Document format.	Microsoft Word Document (*.do +
Default Filename: Comp	aintAcknowledgement	Default Filename:	ComplaintAcknowledgeme	ent	Default Filename:	ComplaintAcknowledgement
elect field to insert.		Select field to incert.			Select field to insert.	
(Author) Aboriginal or Torres Strait	Islander?	first 🥌		-	(Author) First Name	
(Author) Aboriginal or Torres Strai	t Islander?	(Author) First Name				
(Author) Address		(Patient/Client) First N	ame		Insert sele	cted field at the cursor.
(Author) Anonymous? (Author) Can we contact consume	during investigation?	Select a Sub-Document	to insert. 🞯		Select a Sub-Document to	inger. @
(Author) Does consumer want to r	eceive results of investig	No SubDocuments avail	able	-	No SubDocuments availab	
(Author) Email						
(Author) First Name						

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 (2). Once you have found the correct field, click the **Insert selected field at the cursor** button (3).

RLDatix

The field is inserted where	Letter Configuration	) feat
the cursor was. What you	This is a : Parent Document	
can see is a placeholder:	Use Unposted Record:  Default Document format. Microsoft Word Document (*.do +	
{MERGEFIELD "db field	Default Filename: ComplaintAcknowledgement Select field to insert.	
name"}	(Patient/Client) First Name	{MERGEFIELD "FirstName"}

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

	new this letter using an existing record. Enter a record ID	
that the have	e permission to, and click the button below.	
Sample ID		
		like

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:

r <b>i</b> skman
Tokinan
RiskMan Health Complaints Management Department 11 Meaden Street Southbank 3006 Victoria
Australia
{MERGEFIELD "FBCompFirstName"} {MERGEFIELD "FBCompSurname"}
{MERGEFIELD "FBCompAddress1"}
{MERGEFIELD "FBCompSuburb"} {MERGEFIELD "FBCompState"} {MERGEFIELD
"FBCompPostcode"}
FBComprosicoue }
Dear {MERGEFIELD "FBCompFirstName"},
This letter is to acknowledge receipt of your complaint lodged with [MERGEFIELD
"NotificationName"} on {MERGEFIELD "IncidentDate"} at RiskMan Health.
Your complaint is being managed by {MERGEFIELD "FBCurrentOwner"}, who will be in
contact with you soon to arrange a follow up.
{MERGEFIELD "FBCurrentOwner"} can be contacted directly on {MERGEFIELD
"FbkCCDDDOMPN"}, should you wish to discuss any aspect of your complaint in further detail.
Regards,
Sarah Smith
Client Liaison Officer
Risk <mark>Man</mark> Health

Once you are happy with your letter you can save it by clicking the vicon 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 multiselect 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.

- Give the sub document an appropriate name
- Under Letter Configuration, change the document type from Parent to Sub-Document

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

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

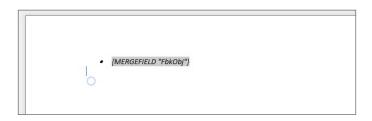
Letter ID:	New Document
Letter Name:	Requested outcomes bulleted
Selected Register:	Feedback Register
Letter Configuration	
This is a :	Sub-Document
Use Unposted Record:	
Default Document format.	Microsoft Word Document (*.do -3
Default Filename:	MergeDoc_20160624_1358
Select document focus. @	
Feedback and Requested o	utcome(s) 5
Select field to insert.	
(Author) Aboriginal or Torr	es Strait Islander? 6

• 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)

Letter Builder

• 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 *signal* 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.

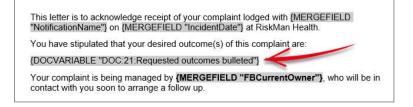
The first thing we are going to do is modify the content of the letter appropriately, to accommodate the information that will be displayed from our sub document:

ŝ	Cut	Arial 💌 11	-		21	§	Δ	- 🖏 Select All	
R	Paste Copy	"A "A Aa + B I U	8		=	3 Normal	Hyperlink	*	
Undo	Clipboard	X' X, <u>A</u> + 🔮 + 🦥 Font	5	‡≣ ▼ 🖄 ▼ Paragraph			Styles	₹ Editing	
	3	Dear {MERGEFIELD "FBC	moFirs	stName"}					1
	ļ	Dear {MERGEFIELD "FBCo	ompFirs	stName"}					
		This letter is to acknowledge	e receip	pt of your complaint					
	1	This letter is to acknowledg "NotificationName"} on {ME	e receip RGEFII	pt of your complaint ELD "IncidentDate")	} at Ris	skMan Hea	alth.		
	1	This letter is to acknowledge	e receip RGEFII	pt of your complaint ELD "IncidentDate")	} at Ris	skMan Hea	alth.	/	

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:

Actions sub document	
Outcomes	
Requested outcomes bulleted	

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.



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

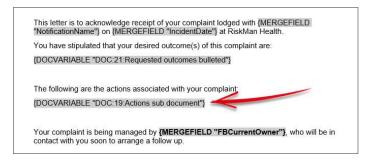
The following is a sub form from the feedback form:

	Action Plan				
÷.	Complaint Item	Notes	Status	Identified person or role	
5	Car parking	Reimburse patient for the parking fine they obtained due to process taking longer than expected	Closed		×
1	Incorrect/Inadequate information	Organise mediation session with patient and spouse to discuss and explain the breakdown of communication which occurred during their visit	Open	Nick Jones	×

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

Related Issue	Description	Responsible Person	Status
{MERGEFIELD "FBIssue"]	(MERGEFIELD "FBIssueNotes")	{MERGEFIELD "FBIssueStaff"}	{MERGE FIELD "FBIssue Status"}
0			

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



And finally, sample output:

You have stipulated that your desired outcome(s) of this complaint are: <ul> <li>Apology</li> </ul>								
Compensation/reimbursement								
<ul> <li>compensat</li> </ul>	longreinibursement							
42,001 - 00000000 € 00000000000000000000000								
42,001 - 00000000 € 00000000000000000000000	the actions associated with your complaint:							
The following are		Responsible Person	Status					
42,001 - 00000000 € 00000000000000000000000	the actions associated with your complaint:	Responsible Person	Status Closed					
The following are	the actions associated with your complaint:  Description  Reimburse patient for the parking fine they obtained due	Responsible Person						

## **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.

#### i) 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.

🕇 In	cident		T
Deres			
ID ID	a column nea		proup by that column
9	P	-	
1	Incident	D	Test 1602 - LB - Incident - 001
2	Incident	V	INC_SUB
3	Incident		4134_t
4	Risk		Risk register
5	Feedback		Complaint Acknowledgement

#### Navigate to Administration> Letter Builder to access the list of pre-created letters

O Click the Letter Name to open the letter

08	12		Letter B	uilder				
Letter Properties	~		File Home Inser	t Page Layout	View			
Letter ID:	5	4	Cut	Calibri	• 11 • A	*A Aa •		Select A
Letter GUID:	9118228d-1080-4a17-b4a8-be46935acd6b	R	Paste Copy	B I <u>U</u> <del>S</del>	X <sup>2</sup> X <sub>2</sub> <u>A</u> * 🕸 *	æ	¶ ■ ± ≡ ■	1
Letter Name:	Complaint Acknowledgement	Un	do Clipboard		Font	6	‡≣ + <u>≫</u> + Paragraph	Editing
Selected Register:	Feedback Register	L.	2     1   2   1   1	(2)  (3)  (4	.   . 5 .   . 6 .   . 7 .   .	3     9     1	0   11   12   13	14   15   2
Letter Configuration								
This is a :	Parent Document							
Use Unposted Record:								
Default Document format.	Rich Text Format (*.rtf)			kmon				
Default Filename:	MergeDoc_20180510_1011		1-1-0	Best Bross Company				
Select field to insert.								Attention of:
	*			-	IELD "FBCompAddress1	361	"} {MERGEFIELD "FBCc	P164

## Olick the icon

ake Inbox Button		
© <sub>6</sub> ⊗ Le	tter Builder, Make Buttons	Û
Letter Builder Guid	9116228d-1080-4a17-b4a8-be4693	35acd6b
Button Title		3
Buttons For	All 🗸 🙆	
Letter Builder from Inbox Enter a button title above, the save tick in the tool ba Please be aware that ALL but only users with the pe	select which pages you want the button to a	ppear on, and click vill see this button,
register will get a result.		

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

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

**5** 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 **0** and **2** and click the **b**utton

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

0	3	1	2	1	oP	ć	ව 2		Complaint Let		Feedback accepted and reviewed, ready for repor			
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		0	Dist		ID Group			Date Entered in RiskMan 📍	Date Received	Closed On 9	Site			
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N	۲		None		5				10 May 2018	1 May 2018		Site A		
	۲		1		4				18 Oct 2016	18 Oct 2016		Site A		
	۲		1		3				12 Oct 2016	12 Oct 2016		Site A		
	۲		None		2				12 Oct 2016	12 Oct 2016		Site-B		
	۲		2		1				28 Sep 2016	28 Sep 2016		Site'D		

• 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

## Click the licon

S 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