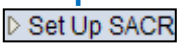
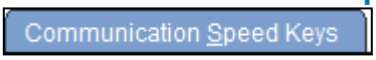
The following is how to send quick letters either by general post or email. Quick letters allows the use of templates or blank forms to quickly create a letter. Also included are steps to view quick letters previously sent and how to change any letters scheduled.

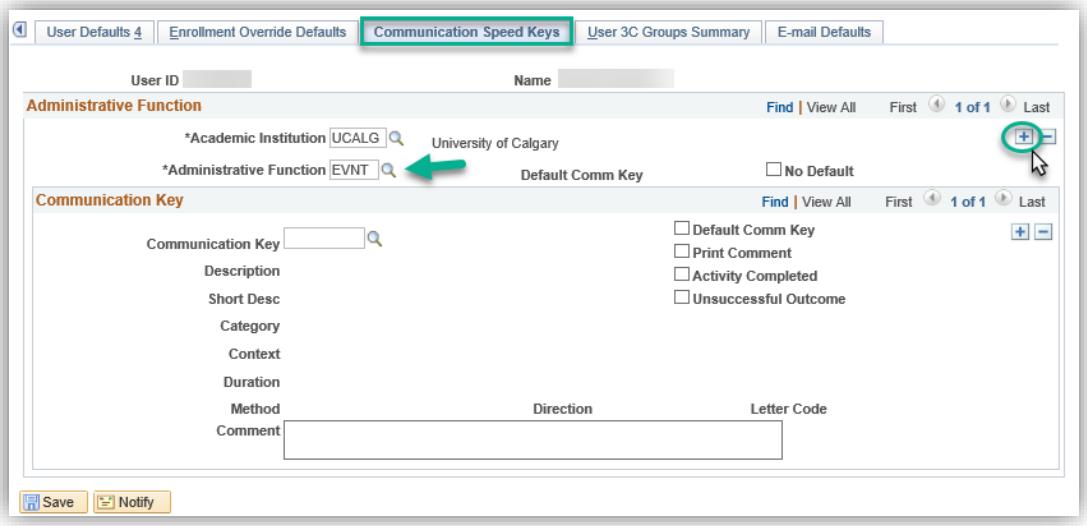
1. Prior to using the Quick letters functionality, some User Defaults must be setup in SACR. Click the **Set Up SACR** link.


2. Click the **User Defaults** link.

3. To view additional tabs in User Defaults you must click on Show following tabs. Click the **Show following tabs** button.

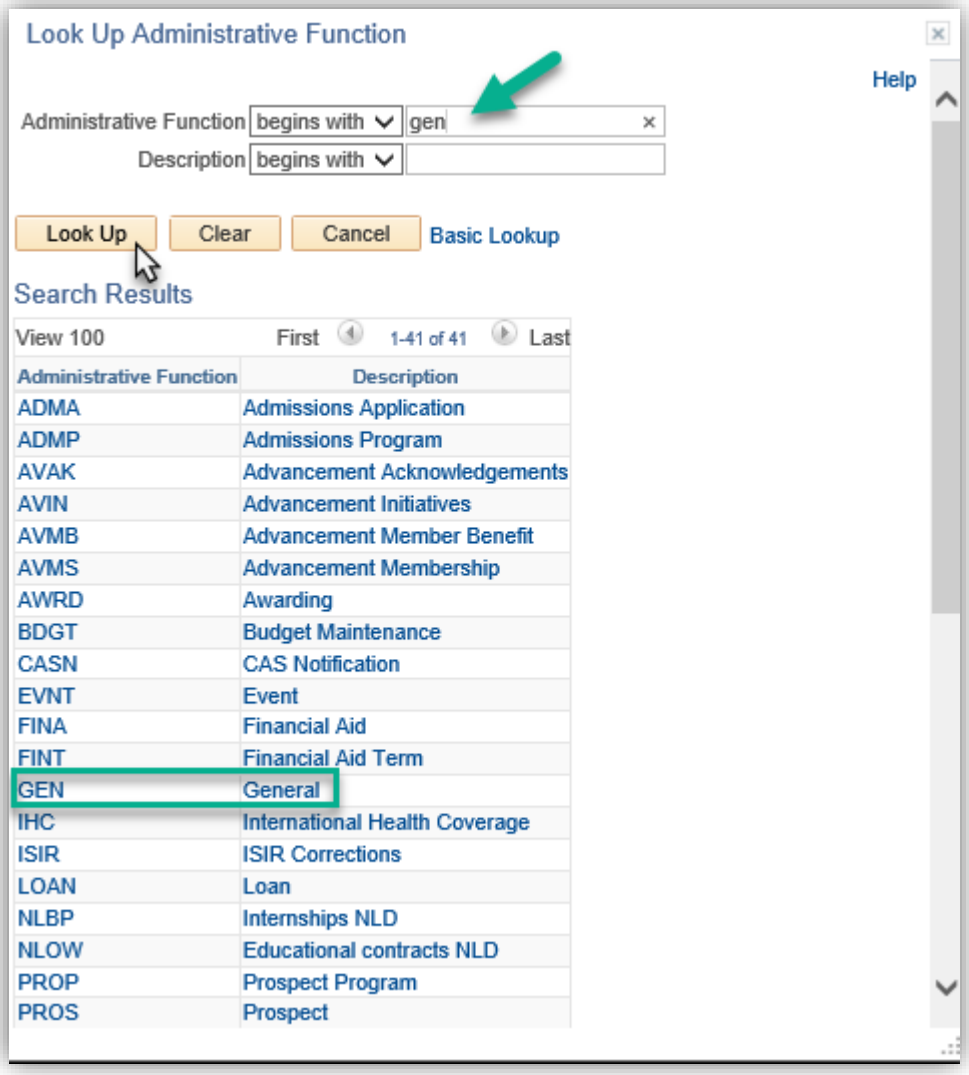
4. Click the **Communication Speed Keys** tab.


5. The Communication Speed Key menu will appear with the default Administrative Function set to **EVNT**. To add additional speed keys click the **Add a new row** button.



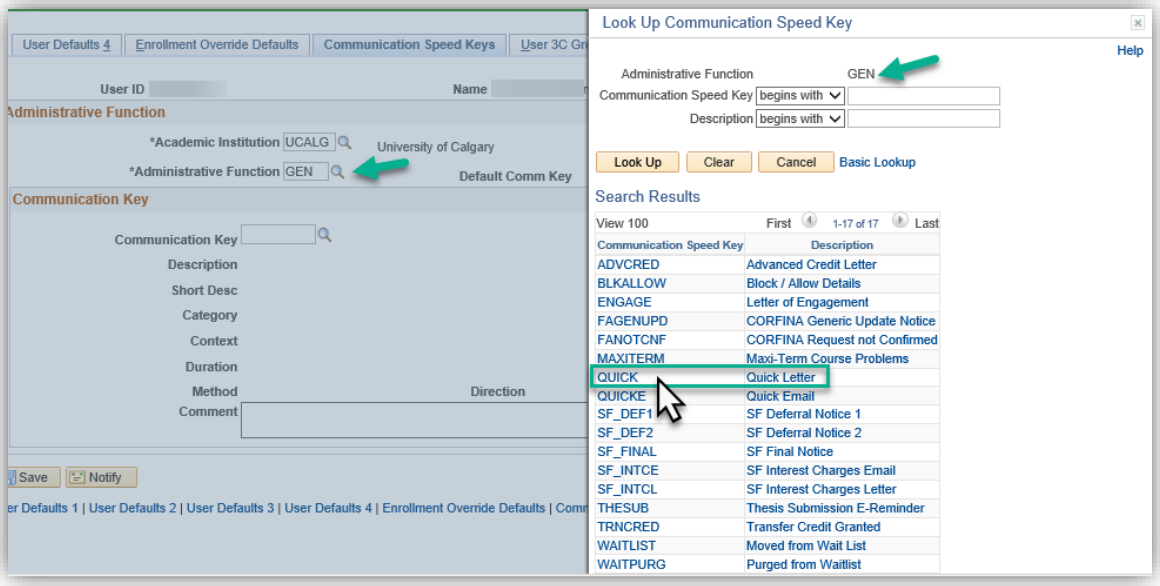
6. Click the **Look up Administrative Function** button.

7. A list of Administrative Functions will appear, scroll down to the Administrative Function **GEN** or type **GEN** in either the Administrative Function or Description field and press **Lookup** or **Enter**. Click the **GEN** link.

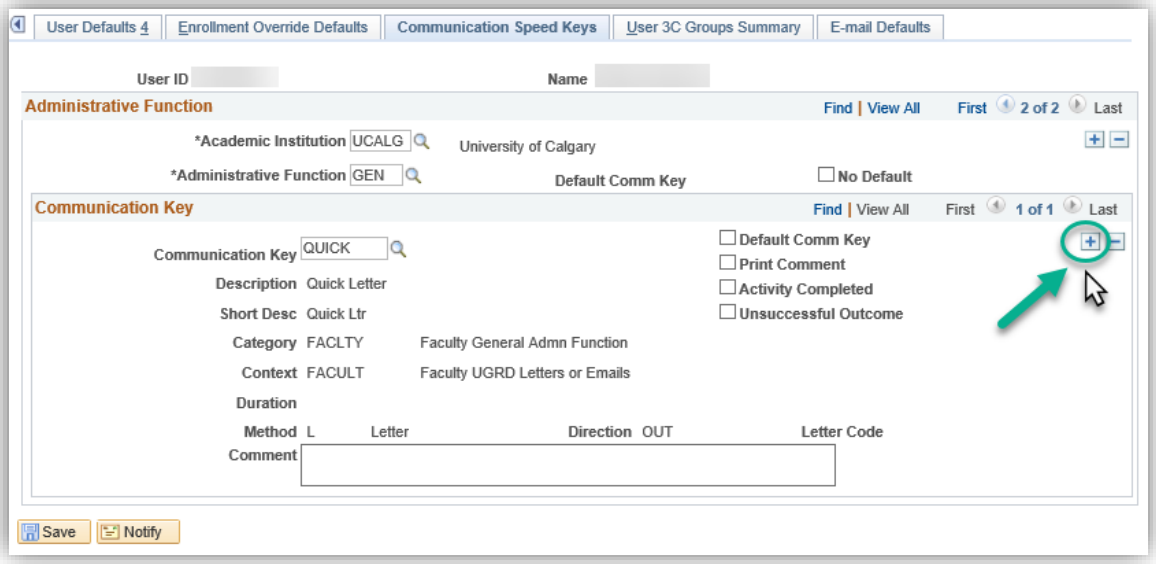


8. Once the General (GEN) Administrative Function has been selected, the corresponding Comm Keys will populate when selected. Click the **Look up Comm Key** button.

9. Selecting QUICK Quick Letter allows the letter to be downloaded for posting. Click the **QUICK** link.

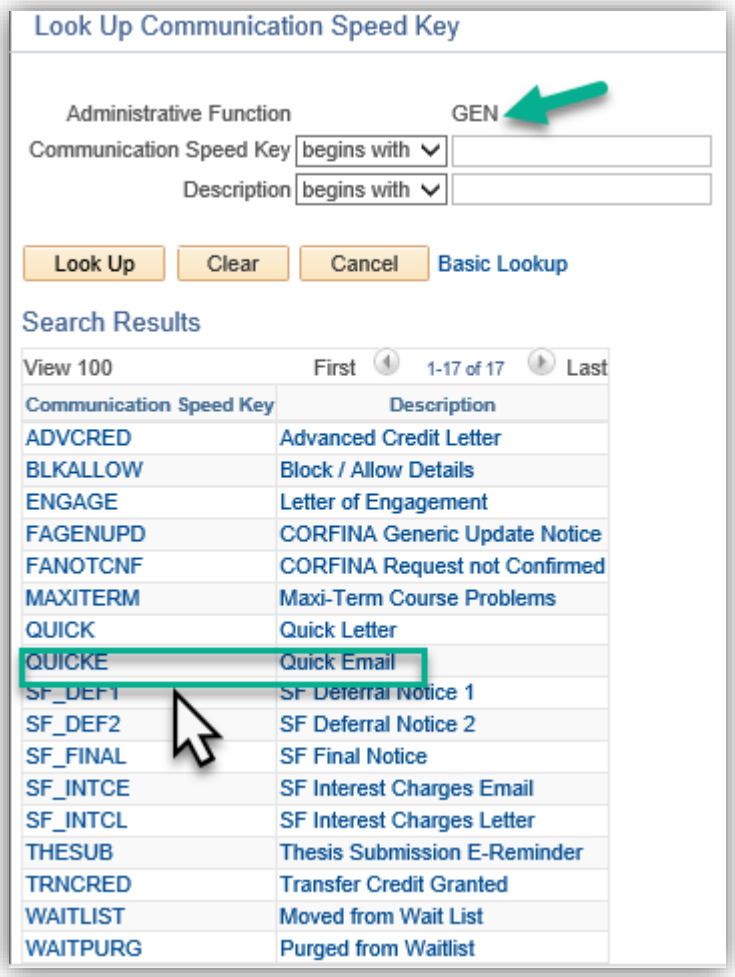


10. Add another Comm Key for Quicke (email) letters. Click the **Add a new row** button.

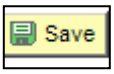


11. Click the **Look up Comm Key** button.

12. Selecting **QUICKE Quick Email** allows the letter to be sent via email. Click the **QUICKE** link.

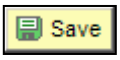


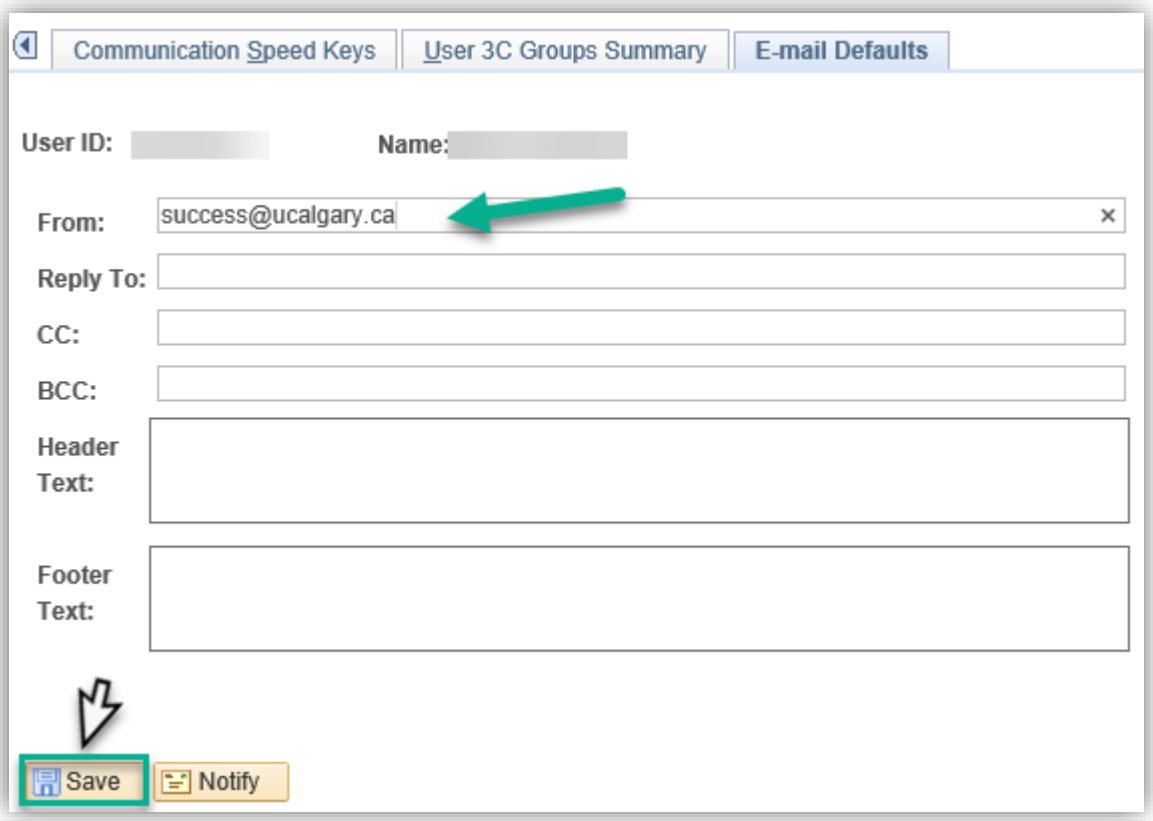
13. The Communication Speed Keys have been setup. **Tip:** To remove the Communication Speed Key click the minus sign on the top section of the page beside the Administrative Function for **GEN** General. Click the **Save** button.



14. In addition to Comm Keys, Email Defaults must be setup. Click the **E-mail Defaults** tab.

15. Enter the desired Email Defaults for the applicable fields; From, Reply To, CC etc. (e.g. success@ucalgary.ca). Click the **Save** button.



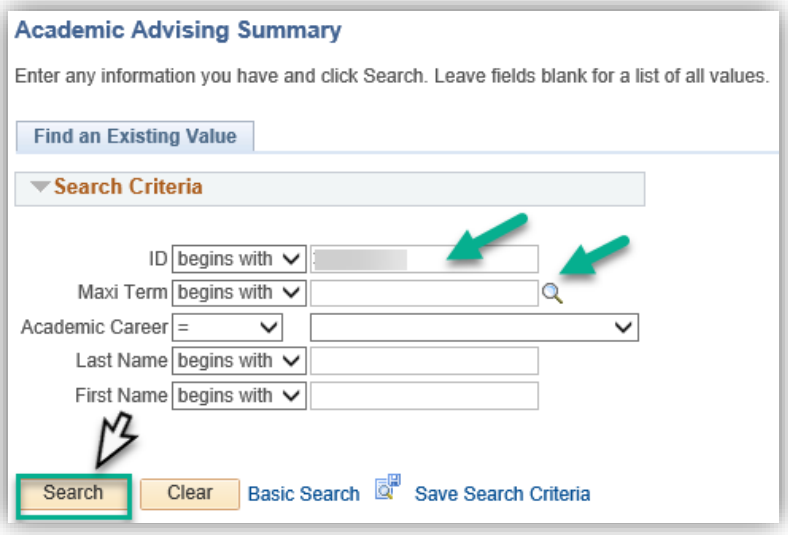


Using the Quick and Quicke Letter Comm Keys

1. Click the **Academic Advisement** link.

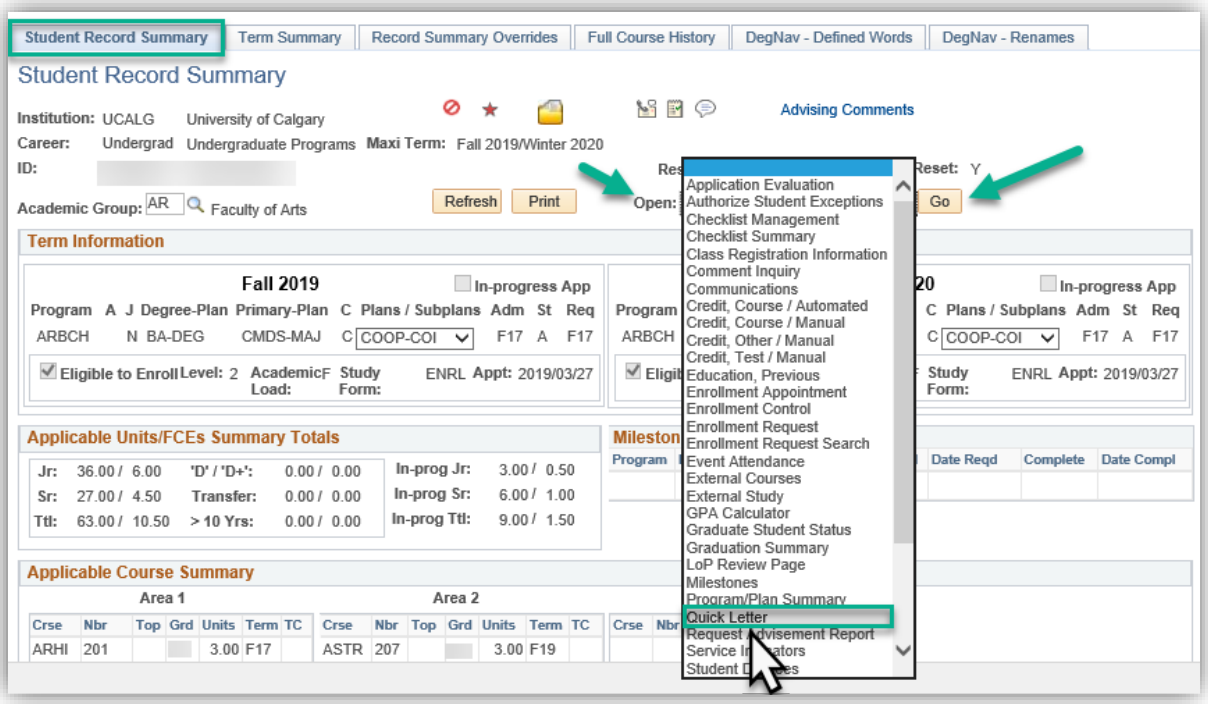
2. Click the **Academic Advising Summary** link.

3. Enter the Student Id number or any other desired search criteria. Click **Enter** or the **Search** button.

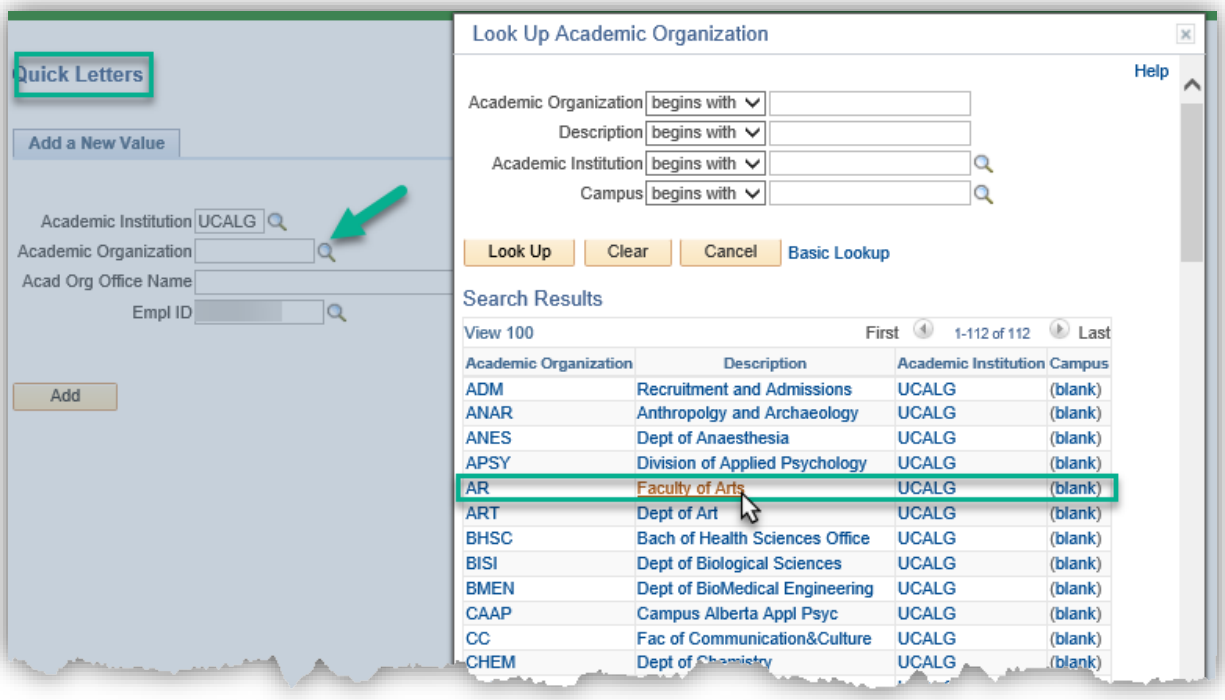


4. The Student Record Summary will appear. Click the **Open** list.

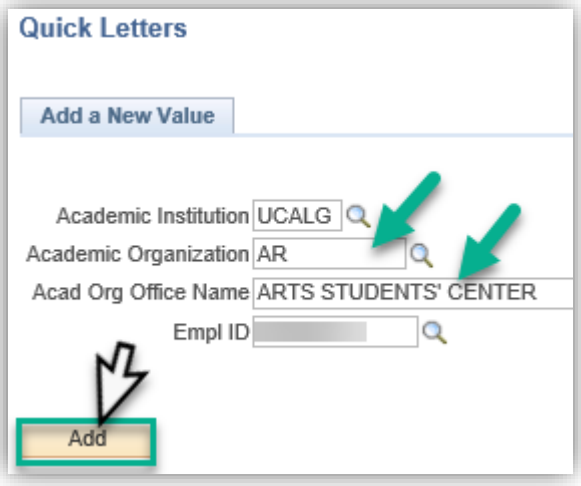
5. Click the **Quick Letter** list item and Click the **Go** button.



6. Quick Letters menu displays (Add a New Value). The student's id number will be carried over from the Student Record Summary. Click the **Look up Academic Organization** button. A list of Academic Organizations will appear, select the appropriate organization (e.g. AR Faculty of Arts).

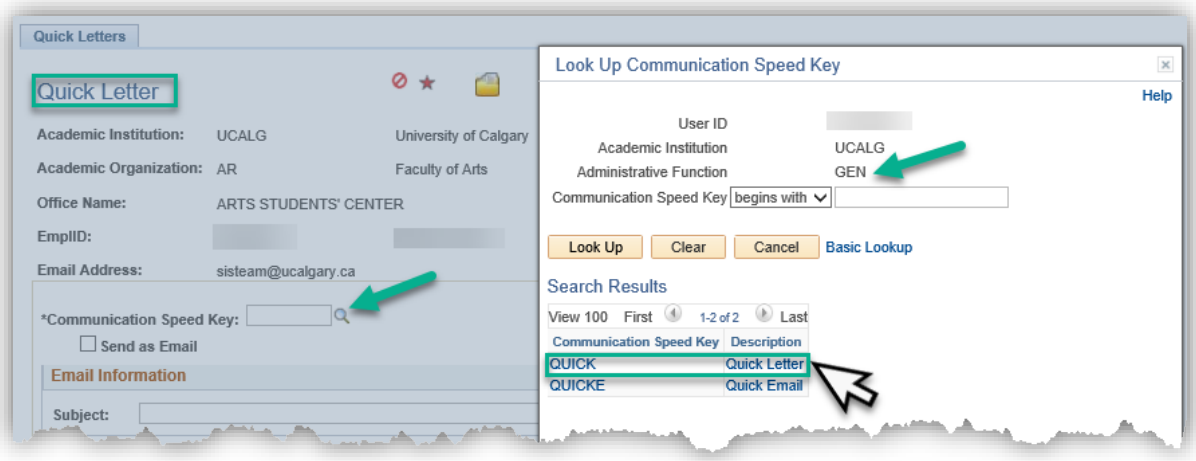


7. Once the Academic Organization is selected, the Acad Org Office Name will autopopulate (e.g. ARTS STUDENTS' CENTER). Click the **Add** button.

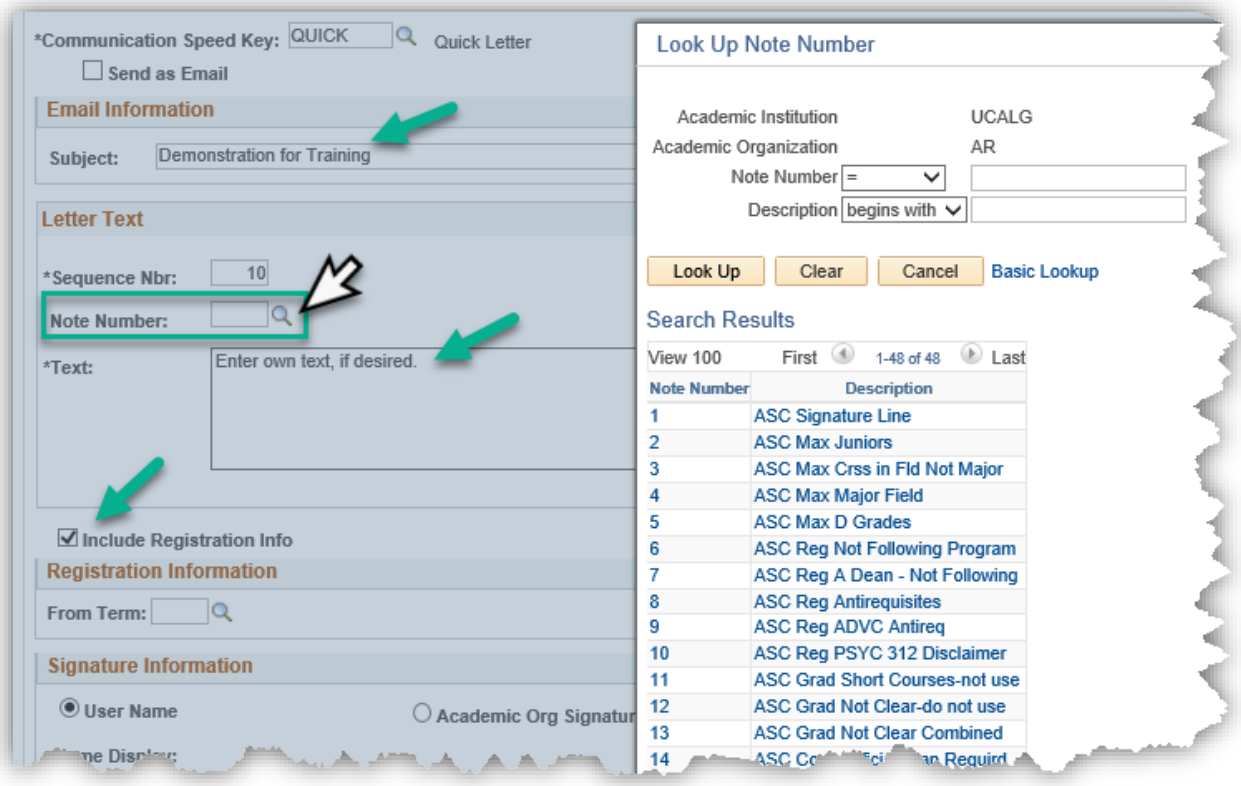


8. Quick Letter will autopopulate the defaults previously setup in SACR. Click the **Look up Communication Speed Key** button.

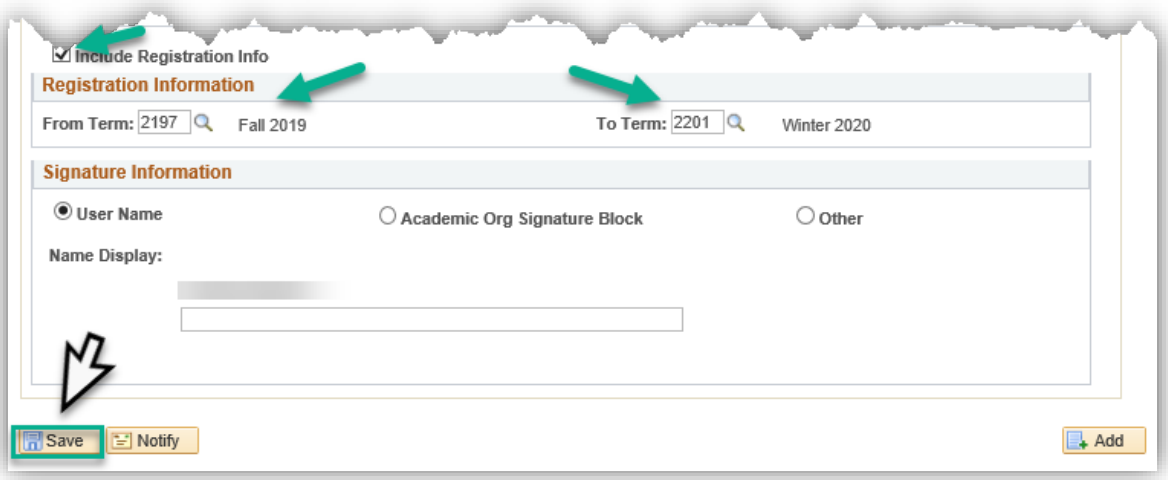
9. The previously setup Comm Keys will appear; Quick and Quicke. For this example, we will select Quick to create a Quick Letter. Click the **QUICK** link.



10. Enter the **Subject** and select **Note Number** to view any existing template information. If you wish to enter other text than the template information, you may include it in the Text portion of the menu.

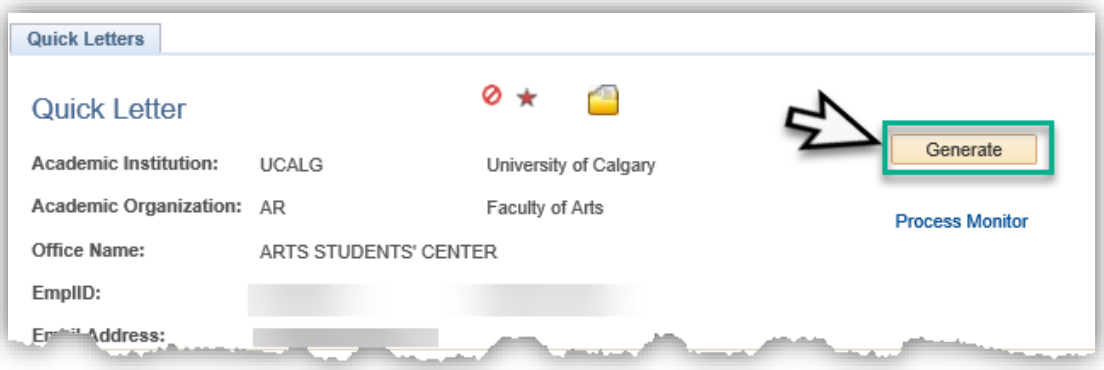


11. Click Include **Registration Info** if you wish to include the student's current registration information. Include the From and To Terms and specify the signature you would like to appear. Click the **Save** button.

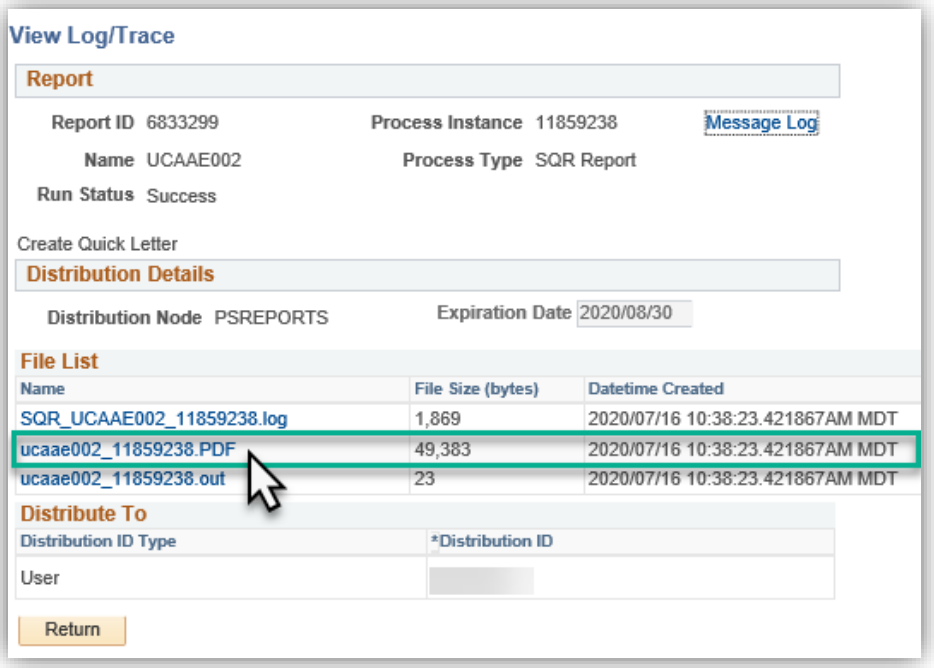


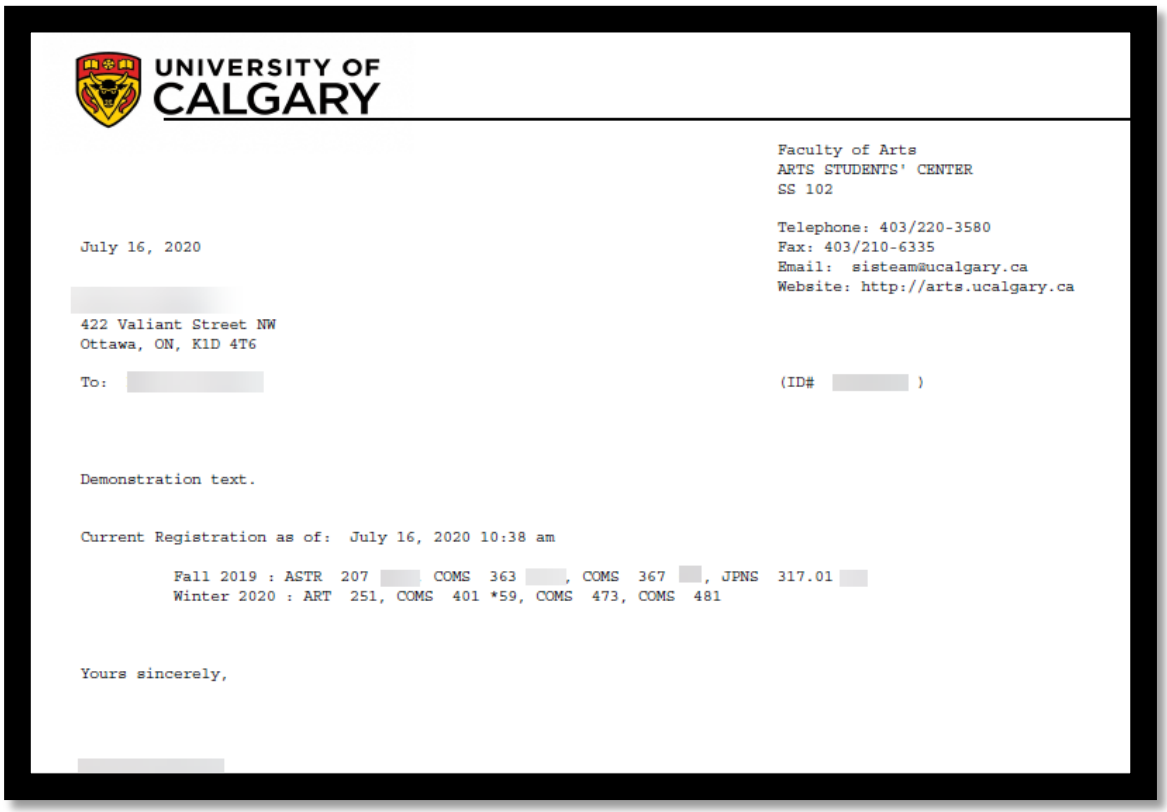
12. To send the letter by regular post. Click the **Generate** button.

Generate



13. Another window will open featuring the progress of the Process Monitor. The monitor will display Queued, Processing then Success. If the Process List displays, click Details > View Log/Trace. Select the .PDF from the File List. The quick letter will display in .pdf format.

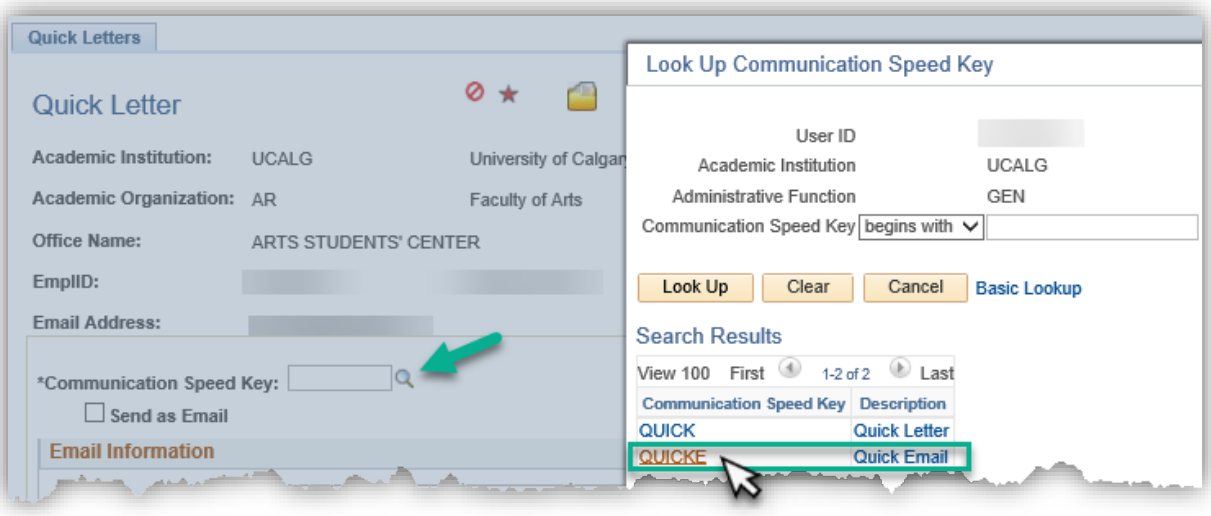




Using the Quicke Letter Comm Key for Email

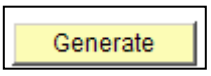
1. Repeat the previous steps selecting Quick letter from Academic Advisement Summary (GO); enter the Academic Institution (e.g. AR Faculty of Arts). On Quick Letter click the **Look up Communication Speed Key** button.

2. Click the **QUICKE** link.



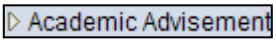
3. Click the **Send as Email** option.

4. Once the Quick Letter menu is completed Generate will begin the process. **You will not be shown a preview of the email,** therefore it is imperative you ensure the information (text, signature, etc.) is accurate before continuing. This will send the email with the letter attached as a .PDF file. Click the **Generate** button.



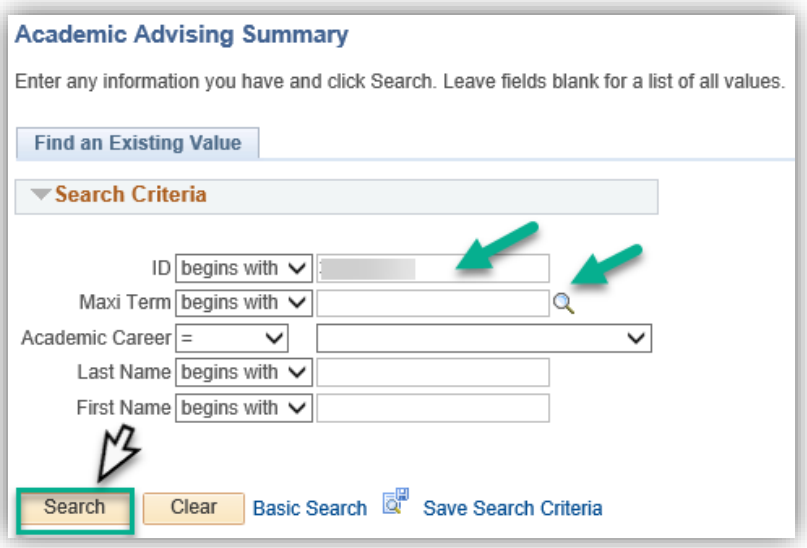
Look Up Existing and Previous Communications

1. Click the **Academic Advisement** link.

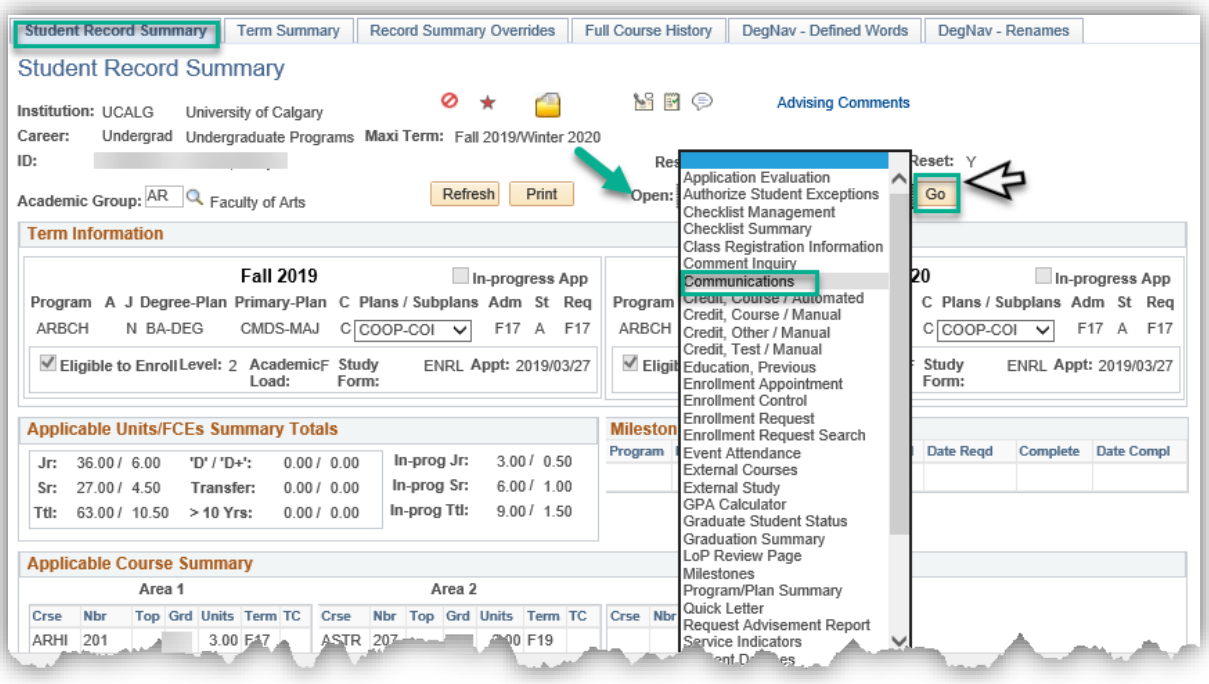


2. Click the **Academic Advising Summary** link.

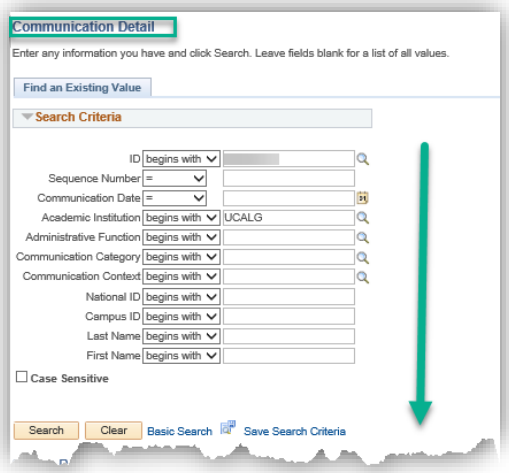
3. Enter the Student Id number or any other desired search criteria. Click **Enter** or the **Search** button.

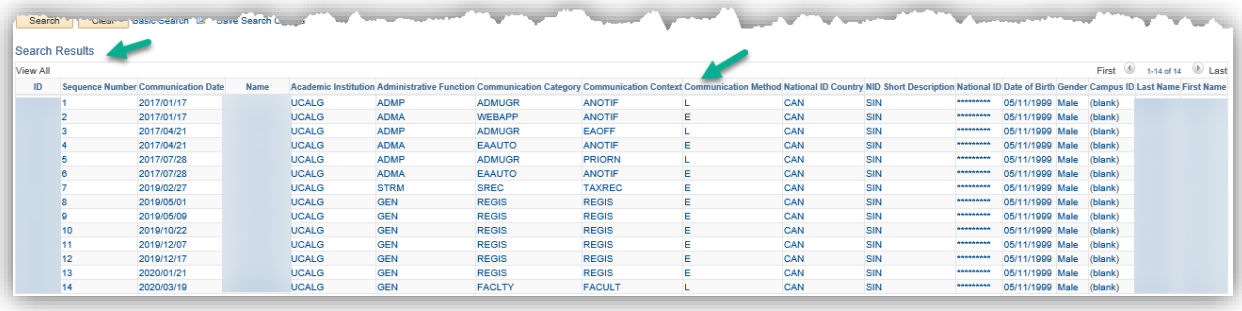


4. From Student Record Summary, click the **Open** list and click the **Communications** list item and click the **Go** button.

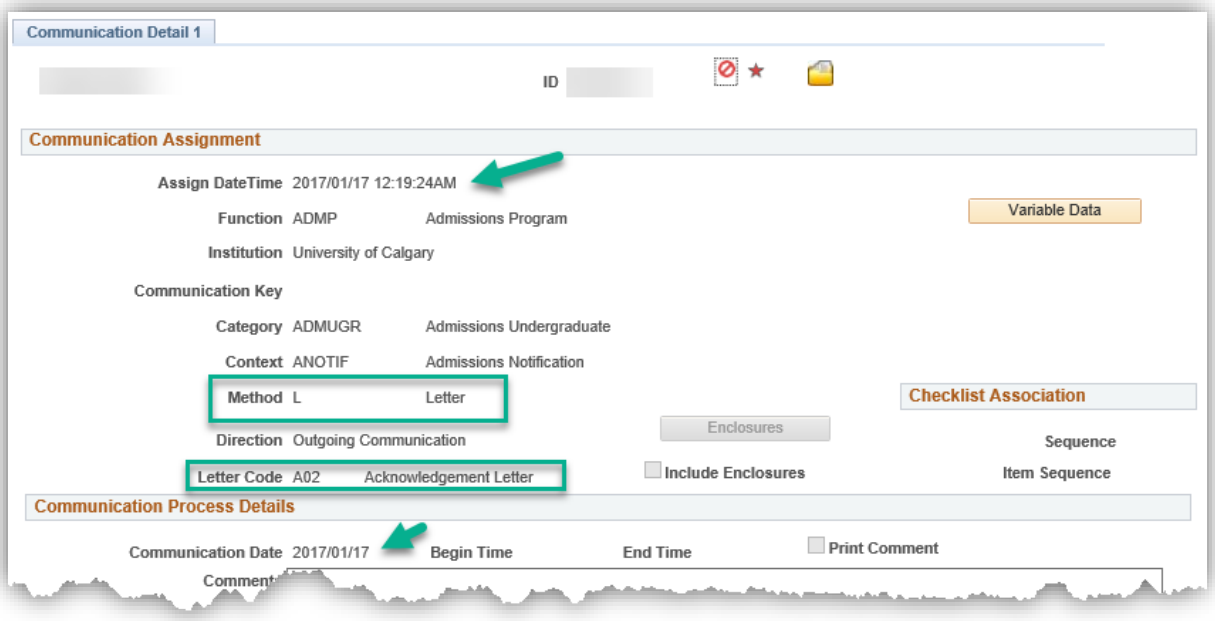


5. **Communication Detail** displays a grid of any previous communications sent. **Note:** Maximize the window to view all communications listed in the grid and select the appropriate communication.



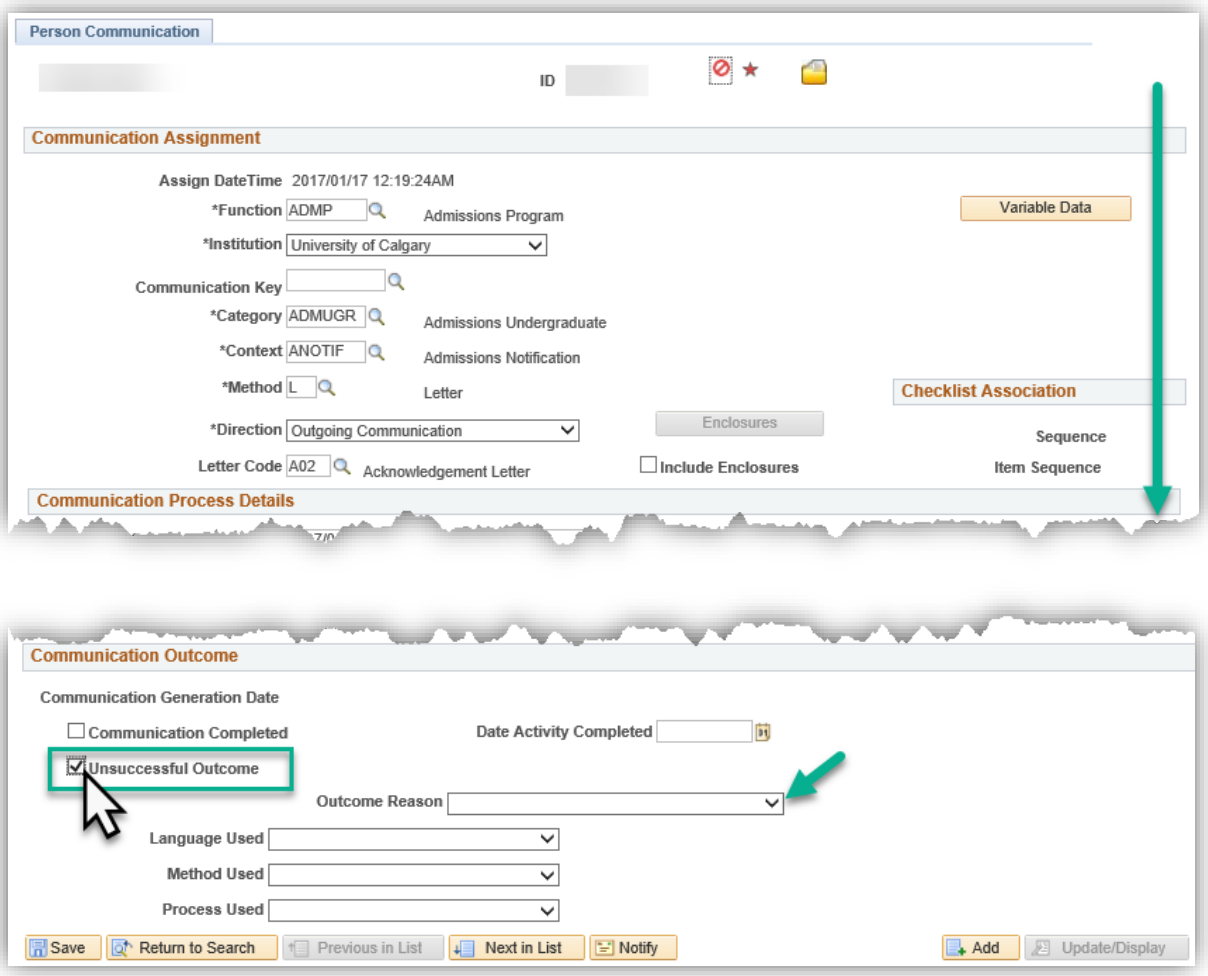


6. The top portion of **Communication Detail 1** indicates the date/time, Function and Method of communication (e.g. L = Letter) as well as other information.



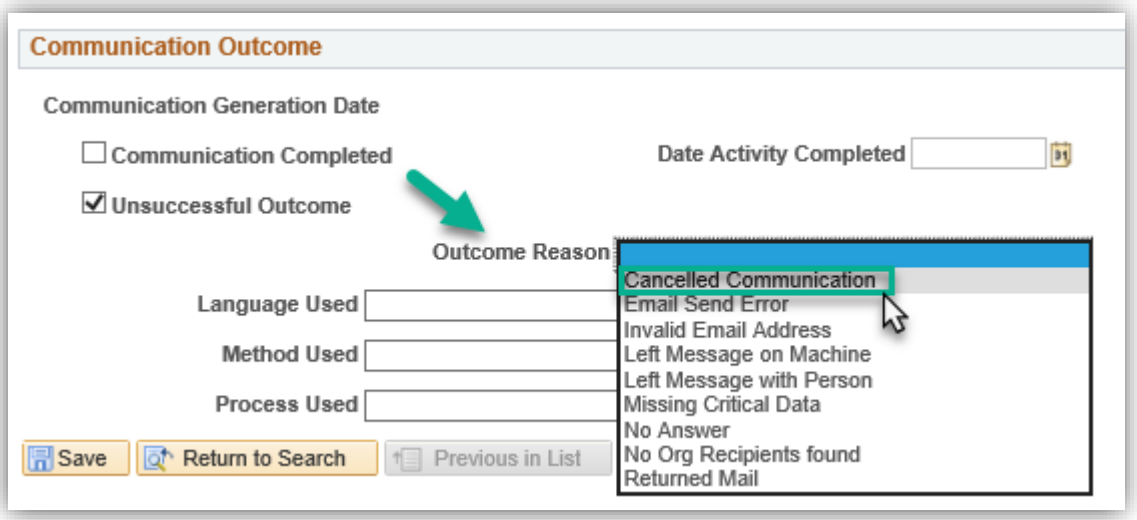
Change/Cancel Communication

1. From **Campus Community > Communications > Person Communications > Communication Management** enter the student ID number and press **Search** or **Enter**.
2. A list of Communications will appear. Select the appropriate communication.
3. The lower portion of the **Person Communication** menu displays **Communication Outcome**. For this example, click the **Unsuccessful Outcome** option.

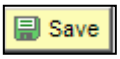


4. Once Unsuccessful Outcome is selected, an Outcome Reason must be selected from the drop down list. Click the **Outcome Reason** list.

5. Several Reasons will appear. For this example, click the **Cancelled Communication** list item.



6. Click the **Save** button.



For the corresponding online learning, consult the Student and Enrolment Services, Student Administration (PeopleSoft Campus Solutions) training website.

End of Procedure.