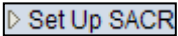


The following is how to send quick letters either by general post or email. Quick letters allows the use of templates or blank forms to quickly create a letter. Also included are steps to view quick letters previously sent and how to change any letters scheduled.

1. Prior to using the Quick letters functionality, some User Defaults must be setup in SACR. Click the [Set Up SACR](#) link.



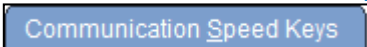
2. Click the [User Defaults](#) link.



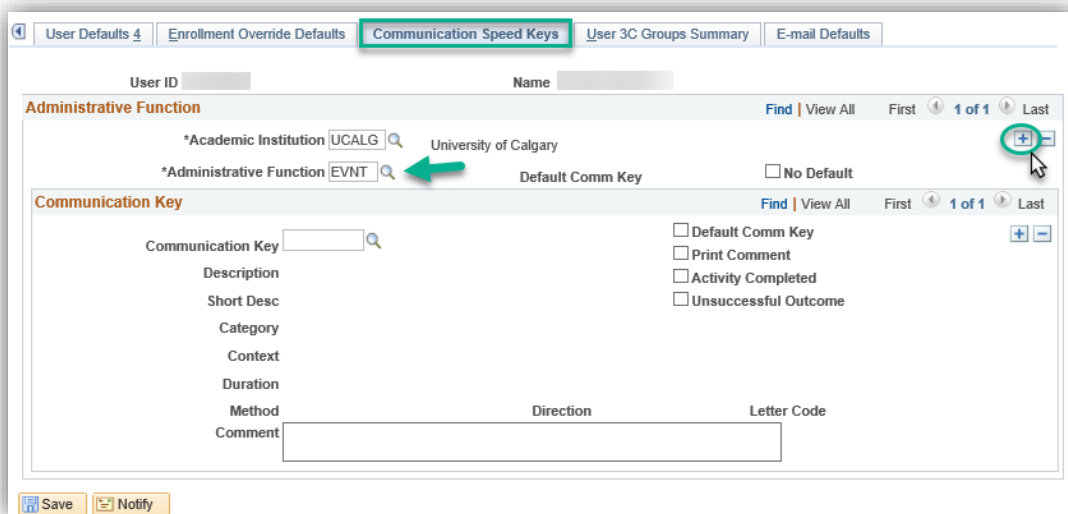
3. To view additional tabs in User Defaults you must click on Show following tabs. Click the [Show following tabs](#) button.



4. Click the [Communication Speed Keys](#) tab.



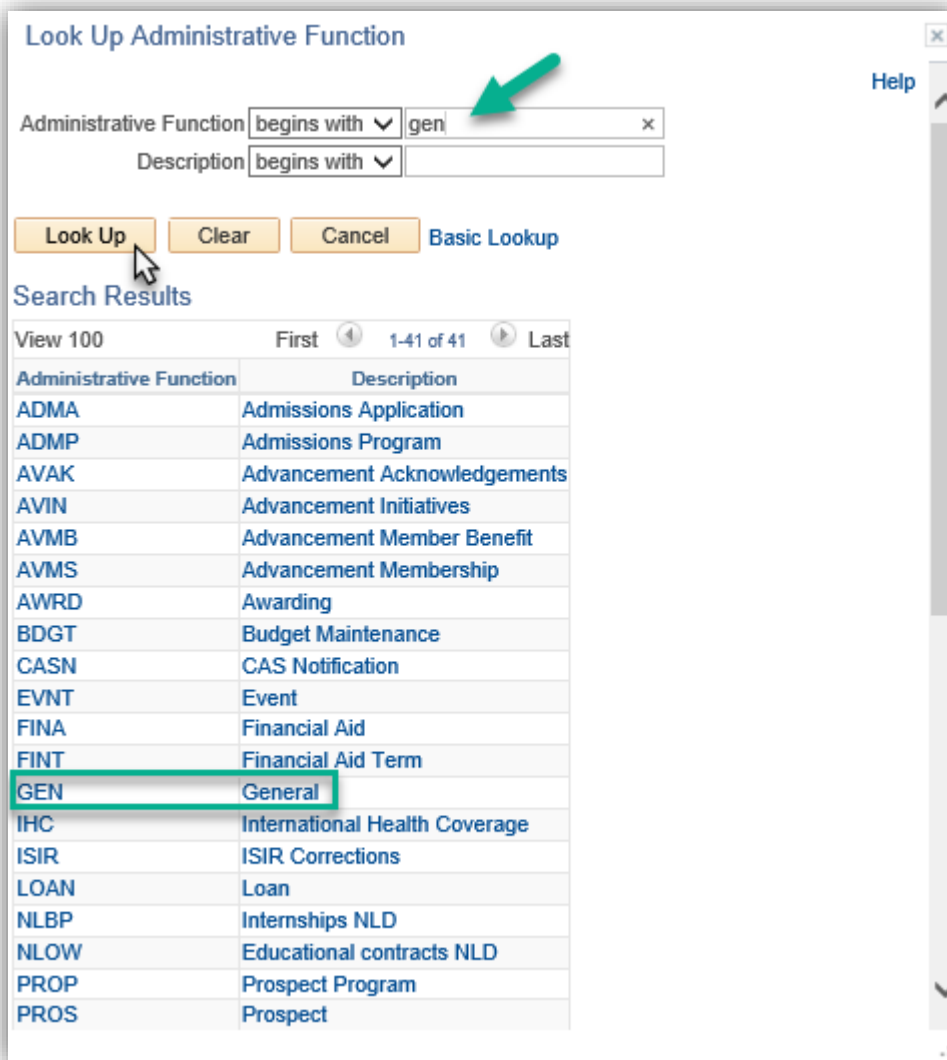
5. The Communication Speed Key menu will appear with the default Administrative Function set to [EVNT](#). To add additional speed keys click the [Add a new row](#) button.



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.



**Look Up Administrative Function**

Administrative Function begins with  x

Description begins with

**Look Up** **Clear** **Cancel** Basic Lookup

**Search Results**

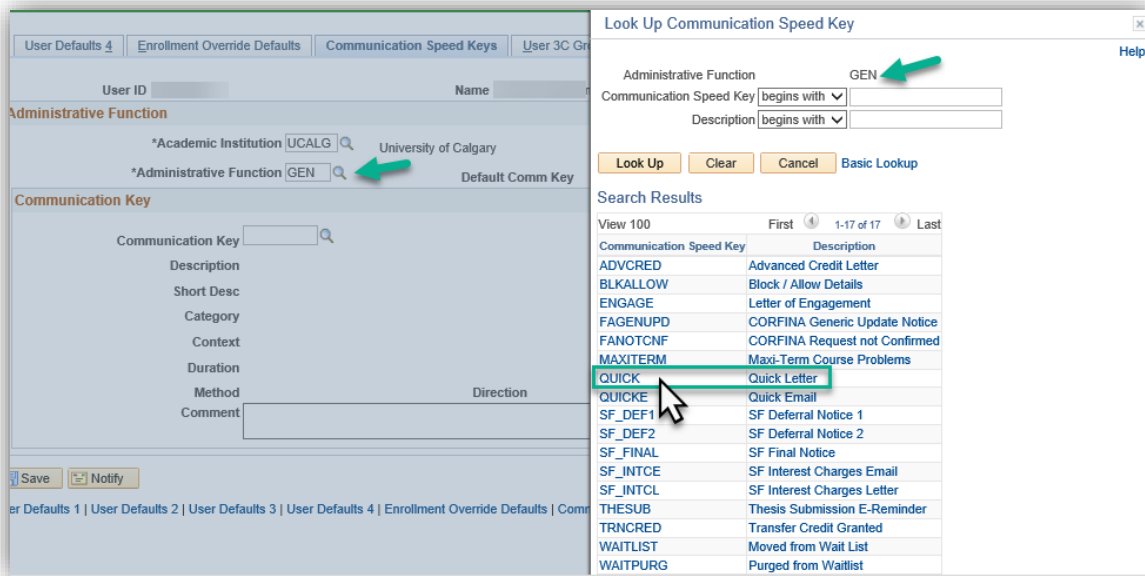
View 100 First 1-41 of 41 Last

Administrative Function	Description
ADMA	Admissions Application
ADMP	Admissions Program
AVAK	Advancement Acknowledgements
AVIN	Advancement Initiatives
AVMB	Advancement Member Benefit
AVMS	Advancement Membership
AWRD	Awarding
BDGT	Budget Maintenance
CASN	CAS Notification
EVNT	Event
FINA	Financial Aid
FINT	Financial Aid Term
<b>GEN</b>	<b>General</b>
IHC	International Health Coverage
ISIR	ISIR Corrections
LOAN	Loan
NLBP	Internships NLD
NLOW	Educational contracts NLD
PROP	Prospect Program
PROS	Prospect

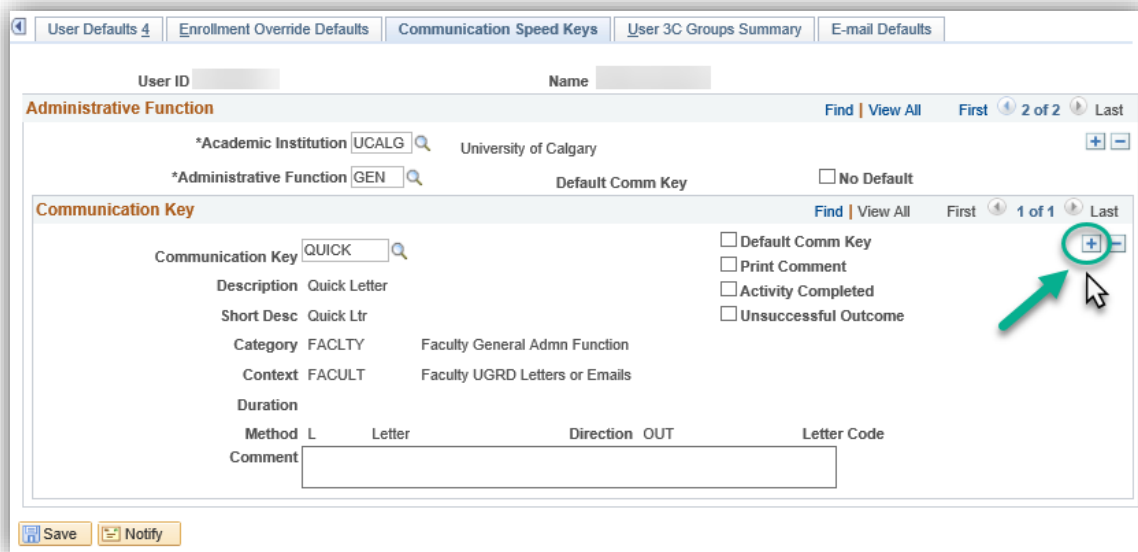
8. Once the General (GEN) Administrative Function has been selected, the corresponding Comm Keys will populate when selected. Click the **Look up Comm Key** button.



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.

Look Up Communication Speed Key

Administrative Function **GEN**

Communication Speed Key begins with

Description begins with

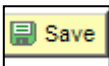
[Basic Lookup](#)

Search Results

View 100 First 1-17 of 17 Last

Communication Speed Key	Description
<a href="#">ADVCRED</a>	Advanced Credit Letter
<a href="#">BLKALLOW</a>	Block / Allow Details
<a href="#">ENGAGE</a>	Letter of Engagement
<a href="#">FAGENUPT</a>	CORFINA Generic Update Notice
<a href="#">FANOTCNF</a>	CORFINA Request not Confirmed
<a href="#">MAXITERM</a>	Maxi-Term Course Problems
<a href="#">QUICK</a>	Quick Letter
<a href="#">QUICKE</a>	Quick Email
<a href="#">SF_DEF1</a>	SF Deferral Notice 1
<a href="#">SF_DEF2</a>	SF Deferral Notice 2
<a href="#">SF_FINAL</a>	SF Final Notice
<a href="#">SF_INTCE</a>	SF Interest Charges Email
<a href="#">SF_INTCL</a>	SF Interest Charges Letter
<a href="#">THESUB</a>	Thesis Submission E-Reminder
<a href="#">TRNCRED</a>	Transfer Credit Granted
<a href="#">WAITLIST</a>	Moved from Wait List
<a href="#">WAITPURG</a>	Purged from Waitlist

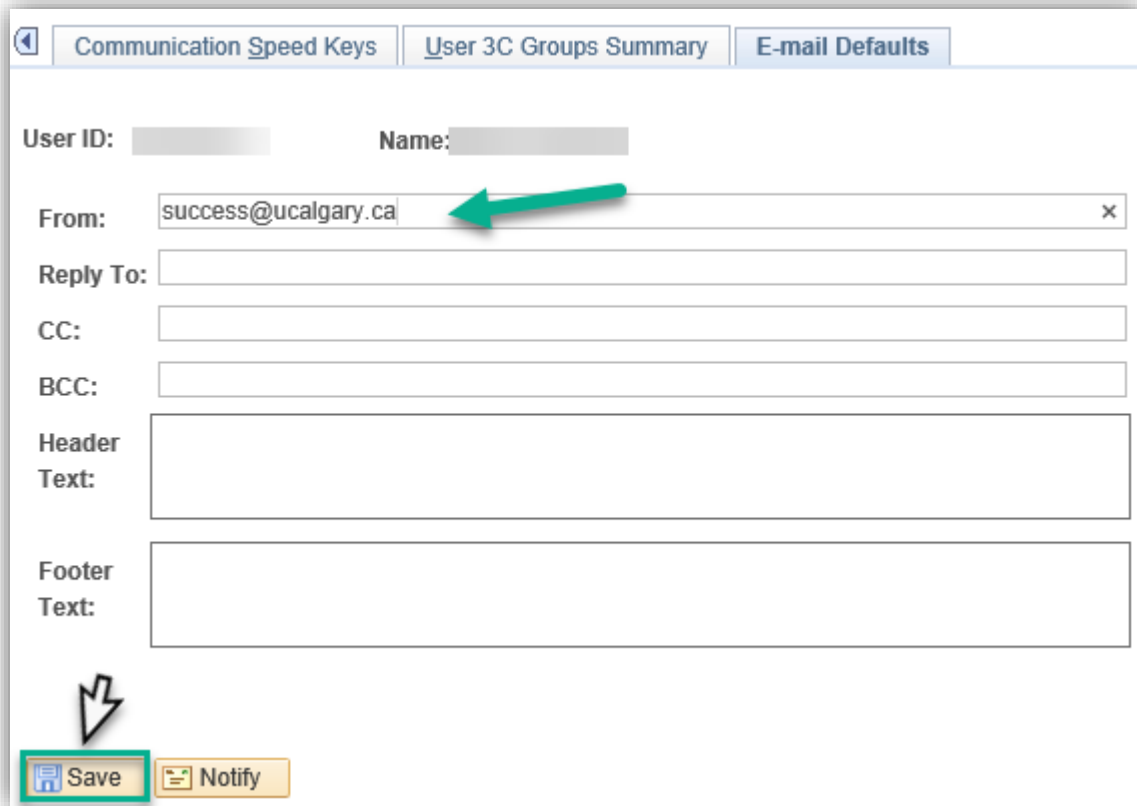
13. The Communication Speed Keys have been setup. **Tip:** To remove the Communication Speed Key click the minus sign on the top section of the page beside the Administrative Function for **GEN** General. Click the **Save** button.



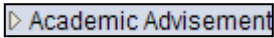
14. In addition to Comm Keys, Email Defaults must be setup. Click the **E-mail Defaults** tab.



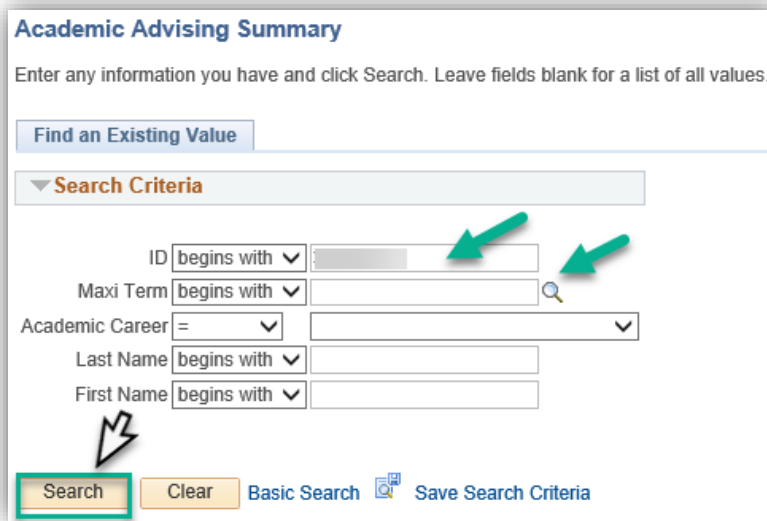
15. Enter the desired Email Defaults for the applicable fields; From, Reply To, CC etc. (e.g. success@ucalgary.ca). Click the **Save** button.



### Using the Quick and Quicke Letter Comm Keys

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

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


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



**Academic Advising Summary**

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

▼ **Search Criteria**

ID begins with [ ]

Maxi Term begins with [ ]

Academic Career = [ ]

Last Name begins with [ ]

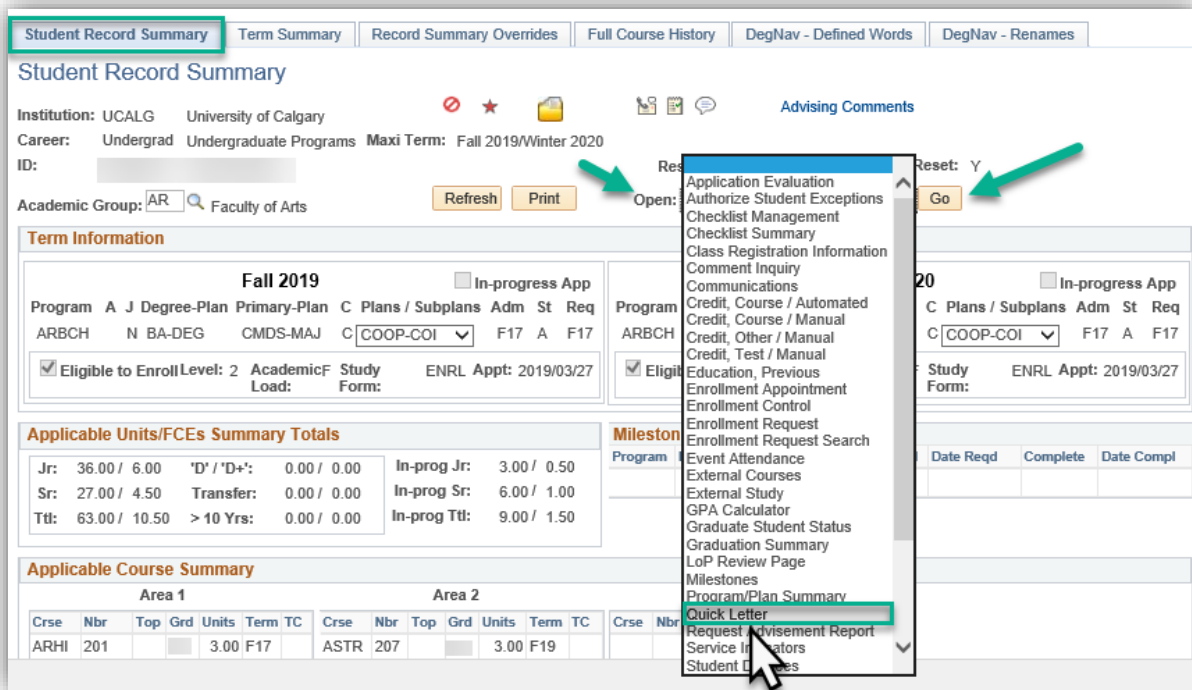
First Name begins with [ ]

**Search** **Clear** **Basic Search** **Save Search Criteria**

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



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

**Student Record Summary**

Institution: UCALG University of Calgary

Career: Undergrad Undergraduate Programs Maxi Term: Fall 2019/Winter 2020

ID: [ ]

Academic Group: AR Faculty of Arts

**Refresh** **Print** **Open:** [ ] **Reset: Y** **Go**

**Term Information**

**Fall 2019**  In-progress App

Program A J Degree-Plan Primary-Plan C Plans / Subplans Adm St Req

ARBCH N BA-DEG CMDS-MAJ C COOP-COI F17 A F17

Eligible to Enroll Level: 2 Academic Load: Study Form: ENRL Appt: 2019/03/27

**Applicable Units/FCEs Summary Totals**

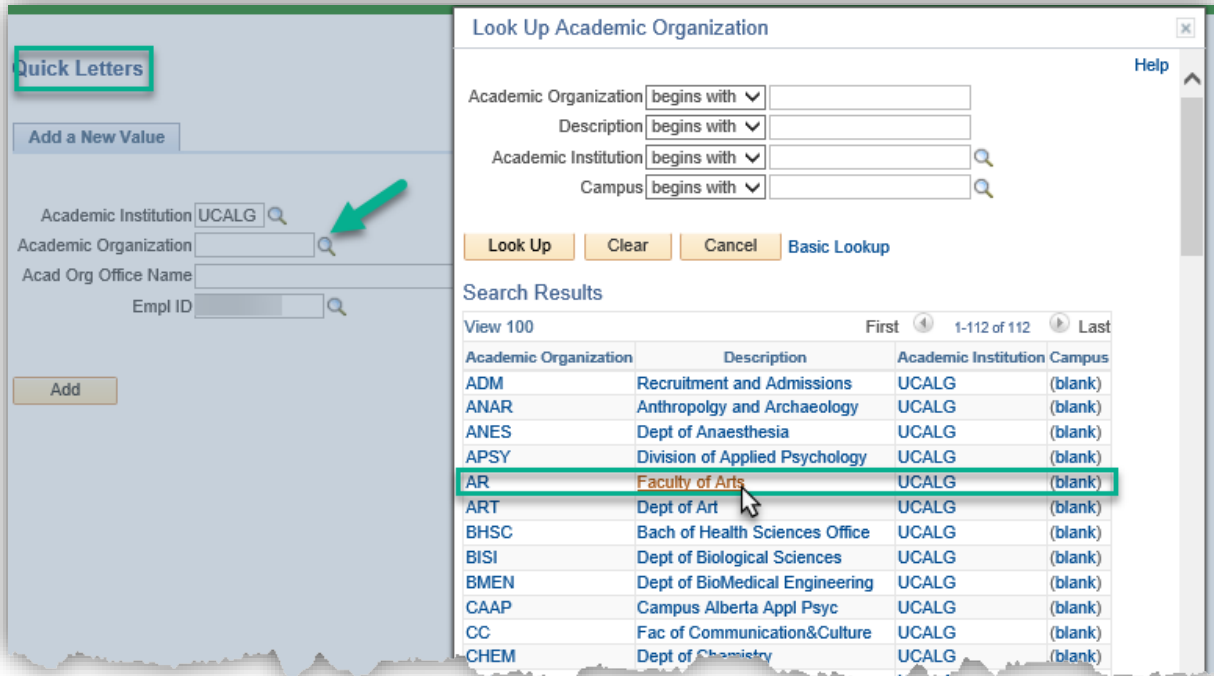
Jr:	36.00 / 6.00	'D' / 'D+':	0.00 / 0.00	In-prog Jr:	3.00 / 0.50
Sr:	27.00 / 4.50	Transfer:	0.00 / 0.00	In-prog Sr:	6.00 / 1.00
Ttl:	63.00 / 10.50	> 10 Yrs:	0.00 / 0.00	In-prog Ttl:	9.00 / 1.50

**Applicable Course Summary**

Area 1						Area 2					
Crse	Nbr	Top	Grd	Units	Term TC	Crse	Nbr	Top	Grd	Units	Term TC
ARHI	201			3.00	F17	ASTR	207			3.00	F19

**Quick Letter**


- 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).




**Look Up Academic Organization**

Academic Organization begins with

Description begins with

Academic Institution begins with  

Campus begins with  

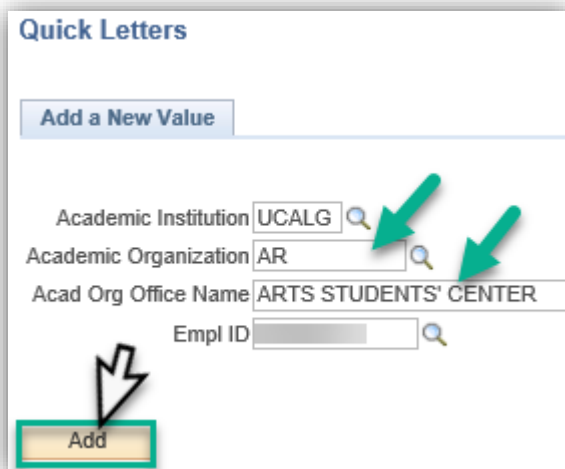
**Look Up** **Clear** **Cancel** **Basic Lookup**

**Search Results**

View 100 First 1-112 of 112 Last


Academic Organization	Description	Academic Institution	Campus
ADM	Recruitment and Admissions	UCALG	(blank)
ANAR	Anthropolgy and Archaeology	UCALG	(blank)
ANES	Dept of Anaesthesia	UCALG	(blank)
APSY	Division of Applied Psychology	UCALG	(blank)
<b>AR</b>	<b>Faculty of Arts</b>	UCALG	(blank)
ART	Dept of Art	UCALG	(blank)
BHSC	Bach of Health Sciences Office	UCALG	(blank)
BISI	Dept of Biological Sciences	UCALG	(blank)
BMEN	Dept of BioMedical Engineering	UCALG	(blank)
CAAP	Campus Alberta Appl Psyc	UCALG	(blank)
CC	Fac of Communication&Culture	UCALG	(blank)
CHEM	Dept of Chemistry	UCALG	(blank)


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




**Quick Letters**

**Add a New Value**

Academic Institution UCALG 

Academic Organization AR 

Acad Org Office Name ARTS STUDENTS' CENTER

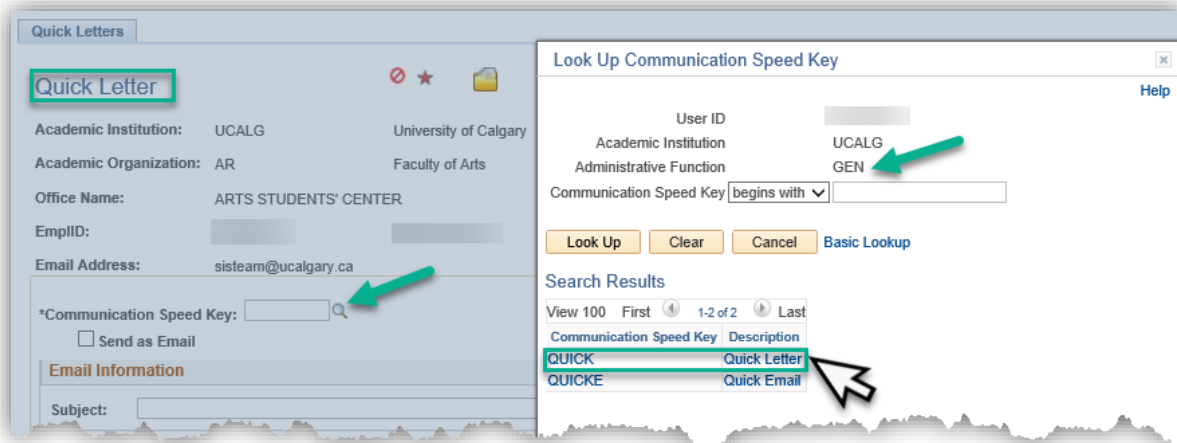
Empl ID  

**Add**

- 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.



Quick Letters

**Quick Letter**

Academic Institution: UCALG University of Calgary  
Academic Organization: AR Faculty of Arts  
Office Name: ARTS STUDENTS' CENTER  
EmplID:   
Email Address: sisteam@ucalgary.ca

\*Communication Speed Key:    Send as Email

**Email Information**

Subject:

**Look Up Communication Speed Key**

User ID:   
Academic Institution: UCALG  
Administrative Function: GEN  
Communication Speed Key begins with

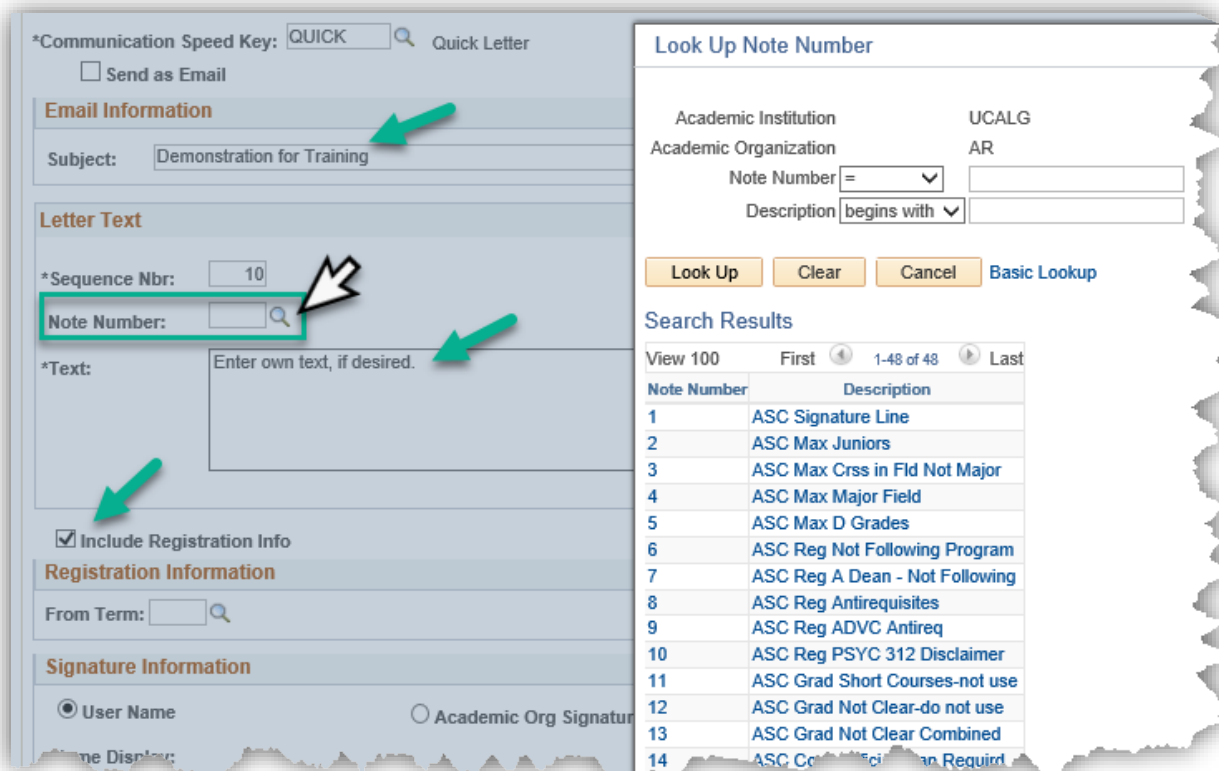
[Basic Lookup](#)

Search Results

View 100 First 1-2 of 2 Last

Communication Speed Key	Description
<a href="#">QUICK</a>	Quick Letter
QUICKE	Quick Email

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.



\*Communication Speed Key:   Quick Letter  Send as Email

**Email Information**

Subject:

**Letter Text**

\*Sequence Nbr:   
**Note Number:**    
\*Text:

Include Registration Info

**Registration Information**

From Term:

**Signature Information**

User Name  Academic Org Signatur

**Look Up Note Number**

Academic Institution: UCALG  
Academic Organization: AR  
Note Number =   
Description begins with

[Basic Lookup](#)

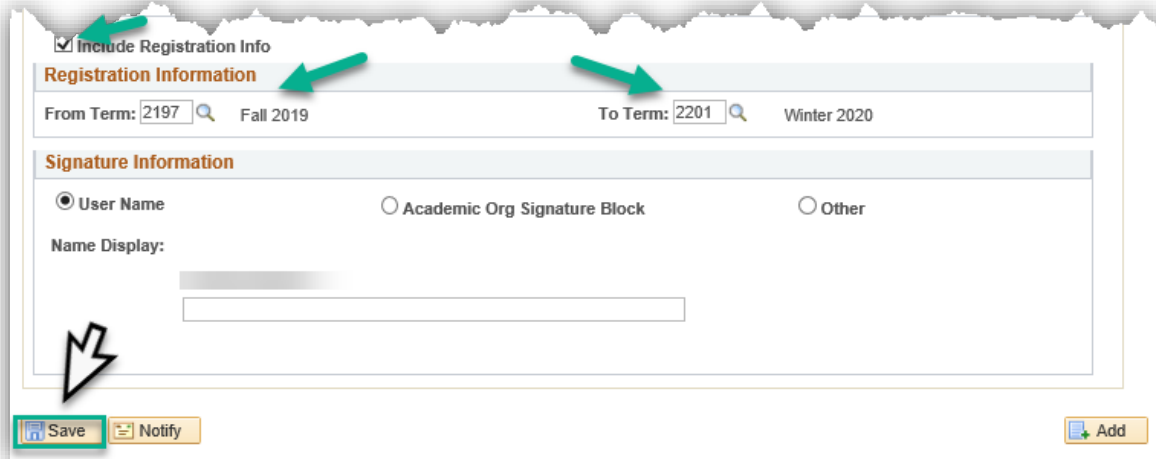
Search Results

View 100 First 1-48 of 48 Last

Note Number	Description
<a href="#">1</a>	ASC Signature Line
<a href="#">2</a>	ASC Max Juniors
<a href="#">3</a>	ASC Max Crss in Fld Not Major
<a href="#">4</a>	ASC Max Major Field
<a href="#">5</a>	ASC Max D Grades
<a href="#">6</a>	ASC Reg Not Following Program
<a href="#">7</a>	ASC Reg A Dean - Not Following
<a href="#">8</a>	ASC Reg Antirequisites
<a href="#">9</a>	ASC Reg ADVC Antireq
<a href="#">10</a>	ASC Reg PSYC 312 Disclaimer
<a href="#">11</a>	ASC Grad Short Courses-not use
<a href="#">12</a>	ASC Grad Not Clear-do not use
<a href="#">13</a>	ASC Grad Not Clear Combined
<a href="#">14</a>	ASC Co... Sci...an Requird



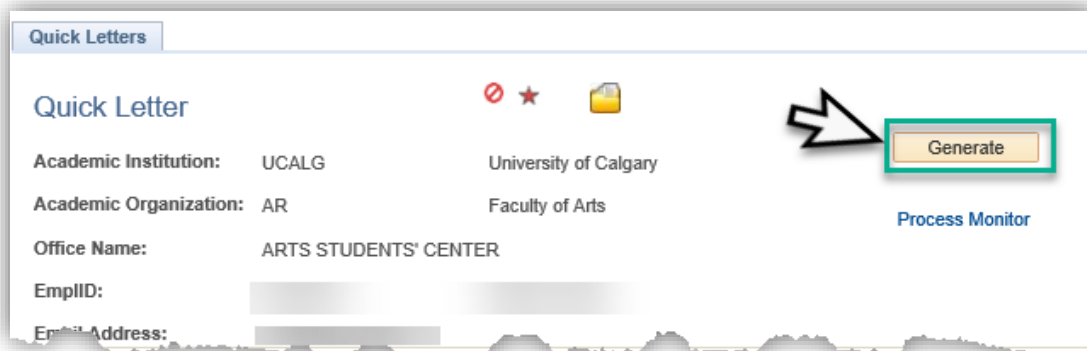
11. Click Include **Registration Info** if you wish to include the student's current registration information. Include the From and To Terms and specify the signature you would like to appear. Click the **Save** button.



The screenshot shows a form titled "Include Registration Info" with a checked checkbox. Below it is a section for "Registration Information" with "From Term" set to "2197" (Fall 2019) and "To Term" set to "2201" (Winter 2020). A "Signature Information" section has three radio buttons: "User Name" (selected), "Academic Org Signature Block", and "Other". A "Name Display" field is present. At the bottom, there are "Save", "Notify", and "Add" buttons. Green arrows point to the checkbox, the "Registration Information" header, and the "From Term" field. A mouse cursor points to the "Save" button.

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

**Generate**



The screenshot shows the "Quick Letter" form with a "Generate" button highlighted by a green box and a mouse cursor. The form displays the following information: "Academic Institution: UCALG University of Calgary", "Academic Organization: AR Faculty of Arts", "Office Name: ARTS STUDENTS' CENTER", "EmplID: [redacted]", and "Email Address: [redacted]". There are also icons for a red circle with a slash, a star, and a folder. A "Process Monitor" link is visible below the "Generate" button.

- 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.

**View Log/Trace**

**Report**

Report ID 6833299      Process Instance 11859238      [Message Log](#)  
 Name UCAAE002      Process Type SQR Report  
 Run Status Success

Create Quick Letter

**Distribution Details**


Distribution Node PSREPORTS      Expiration Date 2020/08/30

**File List**

Name	File Size (bytes)	Datetime Created
SQR_UCAAE002_11859238.log	1,869	2020/07/16 10:38:23.421867AM MDT
ucaae002_11859238.PDF	49,383	2020/07/16 10:38:23.421867AM MDT
ucaae002_11859238.out	23	2020/07/16 10:38:23.421867AM MDT

**Distribute To**

Distribution ID Type      \*Distribution ID  
 User     



**UNIVERSITY OF  
CALGARY**

Faculty of Arts  
 ARTS STUDENTS' CENTER  
 SS 102  
 Telephone: 403/220-3580  
 Fax: 403/210-6335  
 Email: [sisteam@ucalgary.ca](mailto:sisteam@ucalgary.ca)  
 Website: <http://arts.ucalgary.ca>

July 16, 2020

422 Valiant Street NW  
 Ottawa, ON, K1D 4T6

To:  (ID#  )

Demonstration text.

Current Registration as of: July 16, 2020 10:38 am

Fall 2019 : ASTR 207  COMS 363 , COMS 367 , JPNS 317.01   
 Winter 2020 : ART 251, COMS 401 \*59, COMS 473, COMS 481

Yours sincerely,

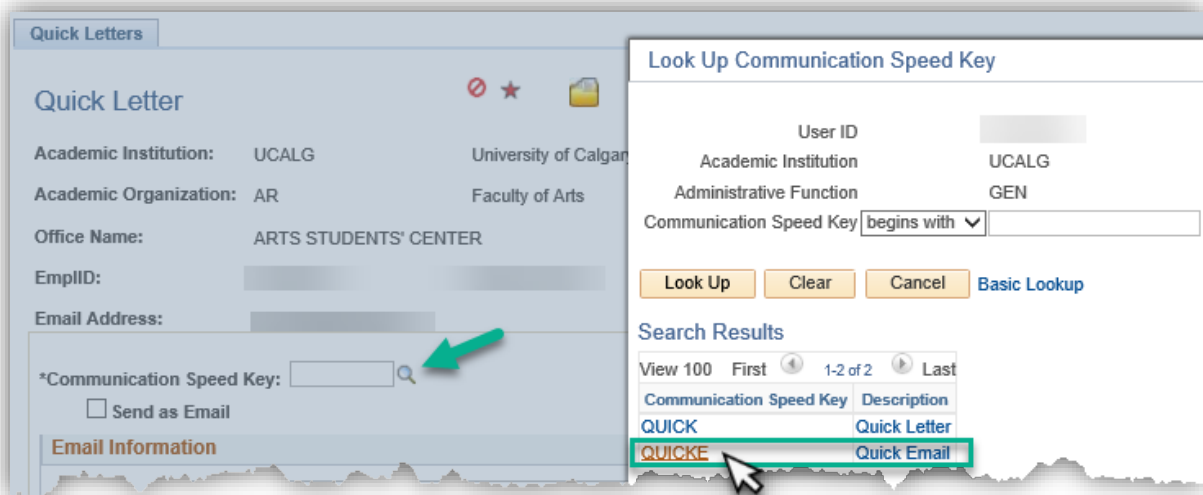
## Using the Quicke Letter Comm Key for Email

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.

[QUICKE](#)



Quick Letters

Quick Letter


Academic Institution: UCALG University of Calgary

Academic Organization: AR Faculty of Arts

Office Name: ARTS STUDENTS' CENTER

EmplID: [Redacted]

Email Address: [Redacted]

\*Communication Speed Key: [Redacted] 

Send as Email

Email Information

Look Up Communication Speed Key

User ID: [Redacted]

Academic Institution: UCALG

Administrative Function: GEN

Communication Speed Key begins with [Redacted]

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-2 of 2 Last

Communication Speed Key	Description
QUICK	Quick Letter
<b>QUICKE</b>	<b>Quick Email</b>

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



\*Communication Speed Key: **QUICKE**  Quick Email

Send as Email

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.

**Generate**

## Look Up Existing and Previous Communications

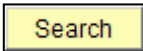
1. Click the **Academic Advisement** link.

[Academic Advisement](#)

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

[Academic Advising Summary](#)

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






**Academic Advising Summary**

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

**Search Criteria**


ID begins with    


Maxi Term begins with  

Academic Career =

Last Name begins with

First Name begins with








**Search** **Clear** **Basic Search**  **Save Search Criteria**

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




**Student Record Summary** Term Summary Record Summary Overrides Full Course History DegNav - Defined Words DegNav - Renames

Institution: UCALG University of Calgary      **Advising Comments**

Career: Undergrad Undergraduate Programs Maxi Term: Fall 2019/Winter 2020

ID:

Academic Group: AR  Faculty of Arts **Refresh** **Print** **Open:** 

**Term Information**

**Fall 2019**  In-progress App

Program	A	J	Degree-Plan	Primary-Plan	C	Plans / Subplans	Adm	St	Req
ARBCH	N	BA-DEG	CMDS-MAJ	C	COOP-COI		F17	A	F17

Eligible to Enroll Level: 2 Academic Load: Study Form: ENRL Appt: 2019/03/27


**Applicable Units/FCEs Summary Totals**

Jr:	36.00 / 6.00	'D' / 'D+':	0.00 / 0.00	In-prog Jr:	3.00 / 0.50
Sr:	27.00 / 4.50	Transfer:	0.00 / 0.00	In-prog Sr:	6.00 / 1.00
Ttl:	63.00 / 10.50	> 10 Yrs:	0.00 / 0.00	In-prog Ttl:	9.00 / 1.50

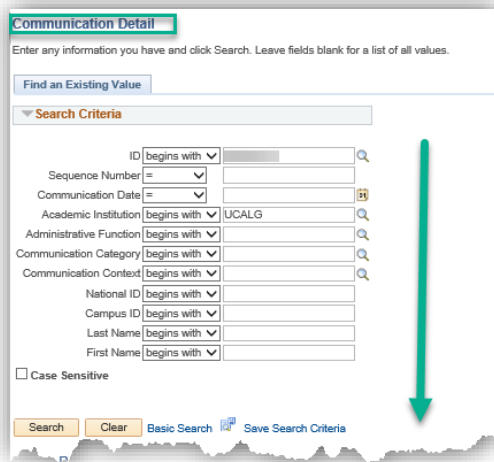
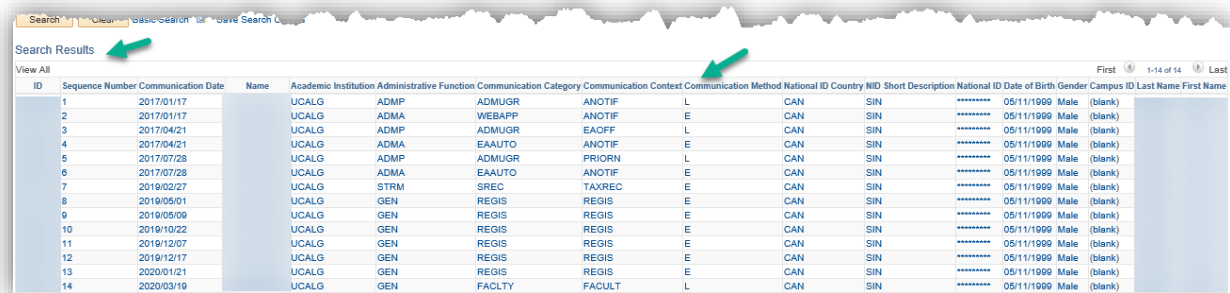
**Applicable Course Summary**

Area 1					Area 2								
Crse	Nbr	Top	Grd	Units	Term	TC	Crse	Nbr	Top	Grd	Units	Term	TC
ARHI	201			3.00	F17		ASTR	207			3.00	F19	

**Open:** Application Evaluation, Authorize Student Exceptions, Checklist Management, Checklist Summary, Class Registration Information, Comment Inquiry, **Communications**, Credit, Course / Automated, Credit, Course / Manual, Credit, Other / Manual, Credit, Test / Manual, Education, Previous, Enrollment Appointment, Enrollment Control, Enrollment Request, Enrollment Request Search, Event Attendance, External Courses, External Study, GPA Calculator, Graduate Student Status, Graduation Summary, LoP Review Page, Milestones, Program/Plan Summary, Quick Letter, Request Advisement Report, Service Indicators, Student Dates

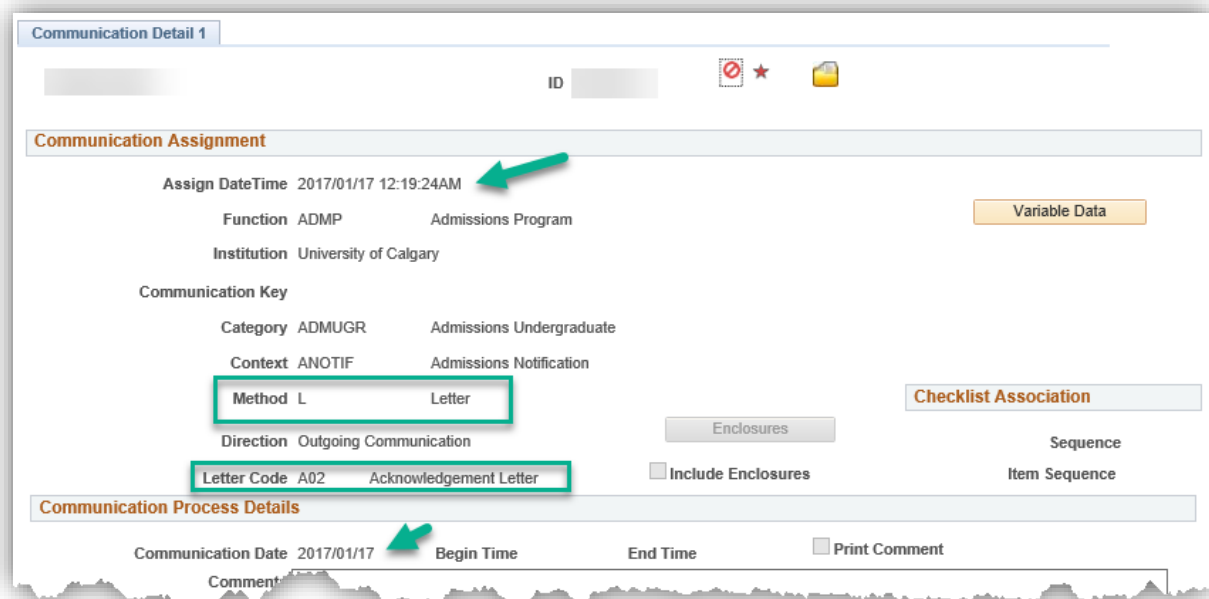
Reset: Y **Go** 

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.

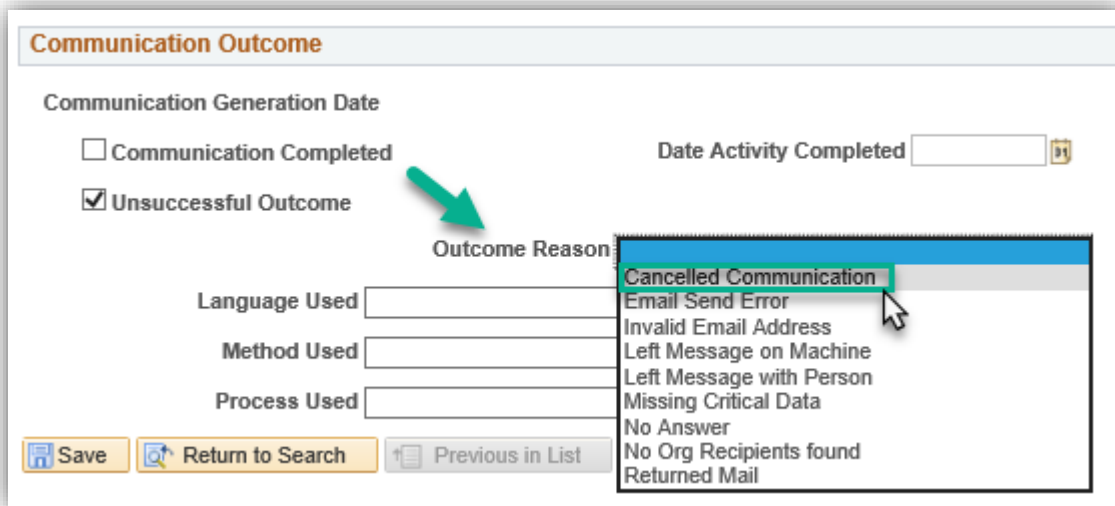
ID	Sequence Number	Communication Date	Name	Academic Institution	Administrative Function	Communication Category	Communication Context	Communication Method	National ID	Country	NID	Short Description	National ID Date of Birth	Gender	Campus ID	Last Name	First Name
1	2017/01/17	UCALG	ADMP	ADMUGR	ANOTIF	L	CAN	SIN	*****	05/11/1990	Male	(blank)					
2	2017/01/17	UCALG	ADMA	WEBAPP	ANOTIF	E	CAN	SIN	*****	05/11/1990	Male	(blank)					
3	2017/04/21	UCALG	ADMP	ADMUGR	EAOFF	L	CAN	SIN	*****	05/11/1990	Male	(blank)					
4	2017/04/21	UCALG	ADMA	EAAUTO	ANOTIF	E	CAN	SIN	*****	05/11/1990	Male	(blank)					
5	2017/07/28	UCALG	ADMP	ADMUGR	PRIORN	L	CAN	SIN	*****	05/11/1990	Male	(blank)					
6	2017/07/28	UCALG	ADMA	EAAUTO	ANOTIF	E	CAN	SIN	*****	05/11/1990	Male	(blank)					
7	2019/02/27	UCALG	STRM	SREC	TAXREC	E	CAN	SIN	*****	05/11/1990	Male	(blank)					
8	2019/05/01	UCALG	GEN	REGIS	REGIS	E	CAN	SIN	*****	05/11/1990	Male	(blank)					
9	2019/05/09	UCALG	GEN	REGIS	REGIS	E	CAN	SIN	*****	05/11/1990	Male	(blank)					
10	2019/10/22	UCALG	GEN	REGIS	REGIS	E	CAN	SIN	*****	05/11/1990	Male	(blank)					
11	2019/12/07	UCALG	GEN	REGIS	REGIS	E	CAN	SIN	*****	05/11/1990	Male	(blank)					
12	2019/12/17	UCALG	GEN	REGIS	REGIS	E	CAN	SIN	*****	05/11/1990	Male	(blank)					
13	2020/01/21	UCALG	GEN	REGIS	REGIS	E	CAN	SIN	*****	05/11/1990	Male	(blank)					
14	2020/03/19	UCALG	GEN	FACULTY	FACULTY	L	CAN	SIN	*****	05/11/1990	Male	(blank)					

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.





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



**Communication Outcome**

Communication Generation Date

Communication Completed

Unsuccessful Outcome

Date Activity Completed

Outcome Reason

Language Used

Method Used

Process Used

Cancelled Communication

Email Send Error

Invalid Email Address

Left Message on Machine

Left Message with Person

Missing Critical Data

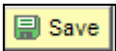
No Answer

No Org Recipients found

Returned Mail

Save Return to Search Previous in List

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.**