

USING WORD PROCESSORS TO CREATE LETTERS WITH SIM

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Some of our Simplified Idea Management (SIM) software customers use Microsoft WORD or another word processor to create merged letters. The SIM manual includes additional information on creating letters through another word processor. Please carefully review that section as well.

When linking to external word processors, SIM only creates a list of data for the letter in question. Each item in the data list, contains information about the idea or suggestion selected along with the person it is being sent to (submitter or evaluator). SIM does not create the letters in the word processor. For BATCH letters, it is necessary to open the word processor manually since the BATCH letters list is normally added to for a day, several days or a week before printing the letters. Each letter that is to be printed must be separately printed, since each will have its own unique data list created by SIM.

Below are some helpful tips we have learned when working with customers to create merge letters:

- 1) First it is important to understand how merge letters work. Since a merge letter is simply a form letter that has links to a data list it is important to understand how to insert those links (fields) and how to create/tie in a data list. Creating merge letters may require a training class on your specific word processor. Most organizations have internal software classes on the standard office software they use.
- 2) Second it may be necessary to load the appropriate ODBC driver so the word processor can read the SIM data list. Although there are several formats of a data list for merge letters that SIM will create, we recommend using a FOXPRO driver. If a FOXPRO driver is not available, try using a dBASE driver. These drivers are loaded from the installation disks of the word processor being used. Below are the steps for WORD (this may vary slightly depending on which OFFICE installation CD version is being used):
 - Insert the installation CD-ROM (in this case an OFFICE disk).
 - From the RUN command type X:SETUP where X: is the drive letter of the CD-ROM drive.
 - Select the ADD/REMOVE option.
 - On the DATA ACCESS option - highlight the option (make sure the checkbox is checked).
 - Select the CHANGE OPTION button.
 - On the DATA ACCESS option - highlight the DATABASE DRIVERS option (make sure the checkbox is checked).
 - Select the CHANGE OPTION button.
 - Check the dBASE and Microsoft FOXPRO drivers option and click on OK.
 - The setup software will now back through the screens we initially went through (by clicking on CHANGE OPTION in the above steps). This time click on OK each of these screens.
 - The setup software will then load any new ODBC drivers and inform you when finished.
- 3) Make sure to use the BATCH options when linking to external word processors. The other option using a direct link to the word processor is more time consuming if multiple letters are to be printed during a day. *PLEASE NOTE: The link to word processor option is not recommended for network (LAN) users.*