



INFORMATION SYSTEMS SERVICES MAIL MERGE USING ACCESS AND WORD

Creating Form Letters

Creating Mailing Labels

Changing the Data Source

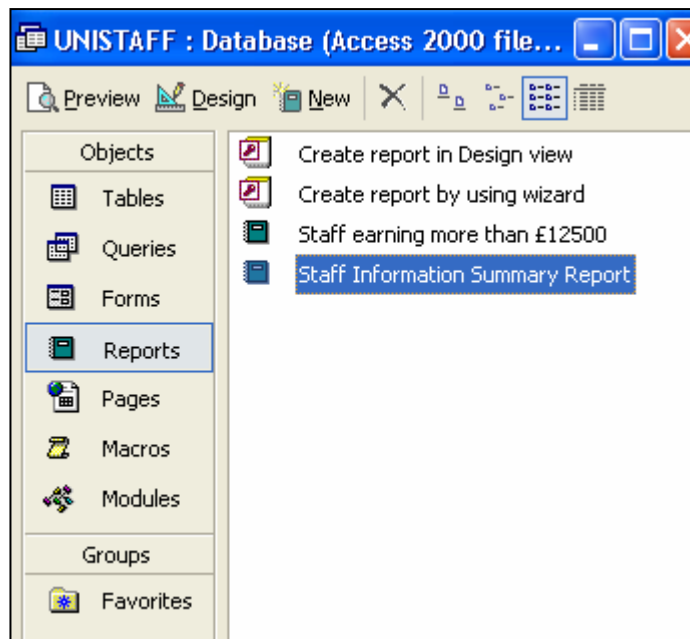


Access MAIL-MERGE

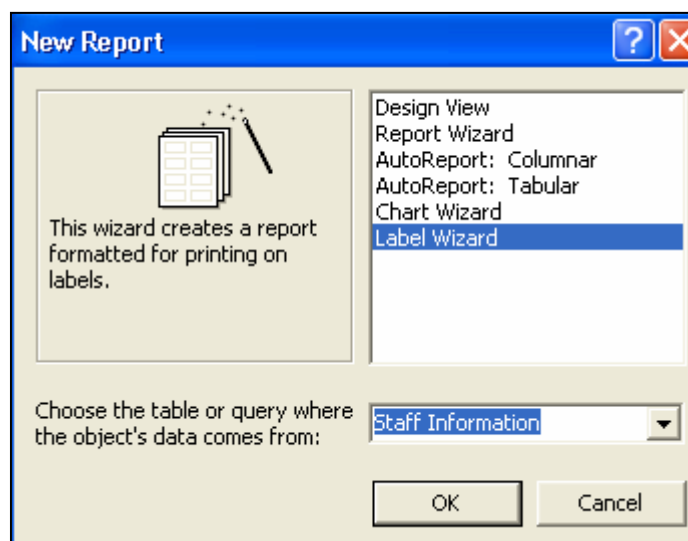
Mail Merge

Activity 1 – Creating Mailing Labels

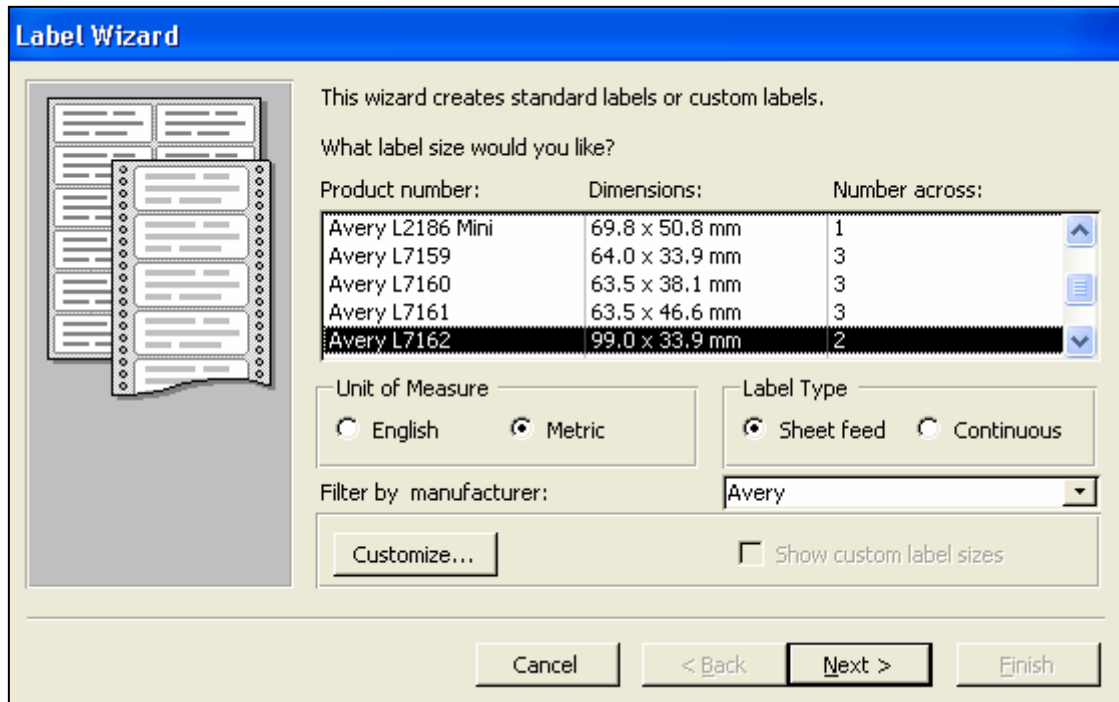
1. Open the **UNISTAFF** database.
2. Click the **Reports** tab on your **Database Window**.



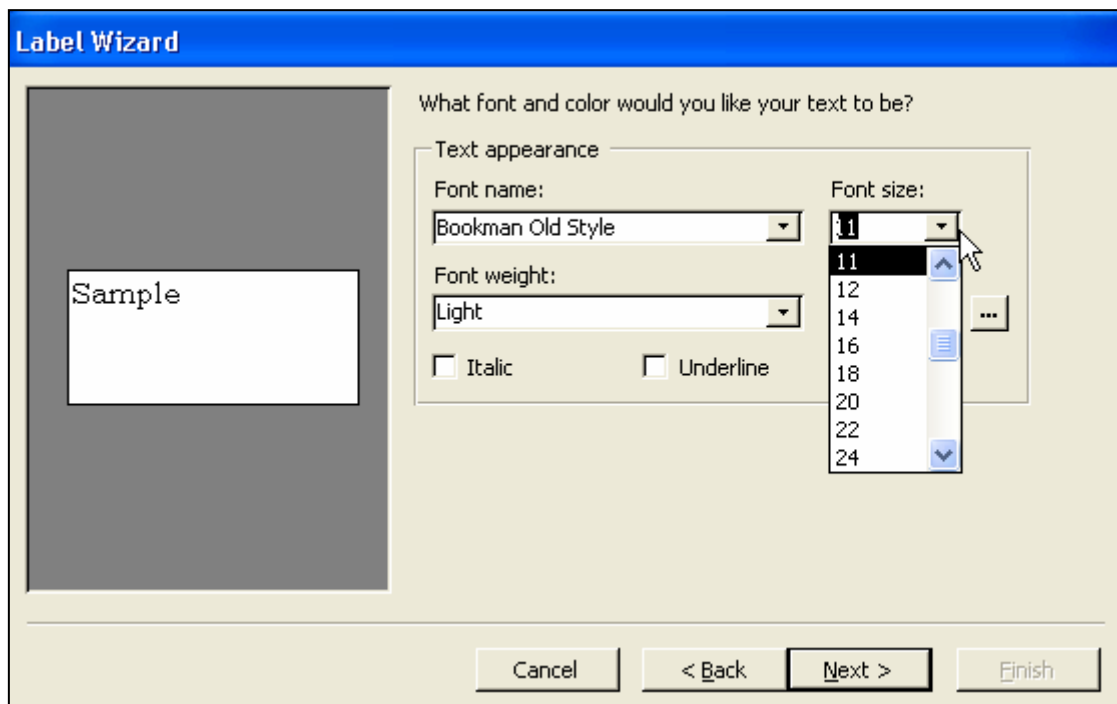
3. Click the **New** button.
4. In the **New Report** box, click the downward pointing arrow to search for the **Staff Information** table. Then from the list of options above choose **Label Wizard**. Click **OK**.






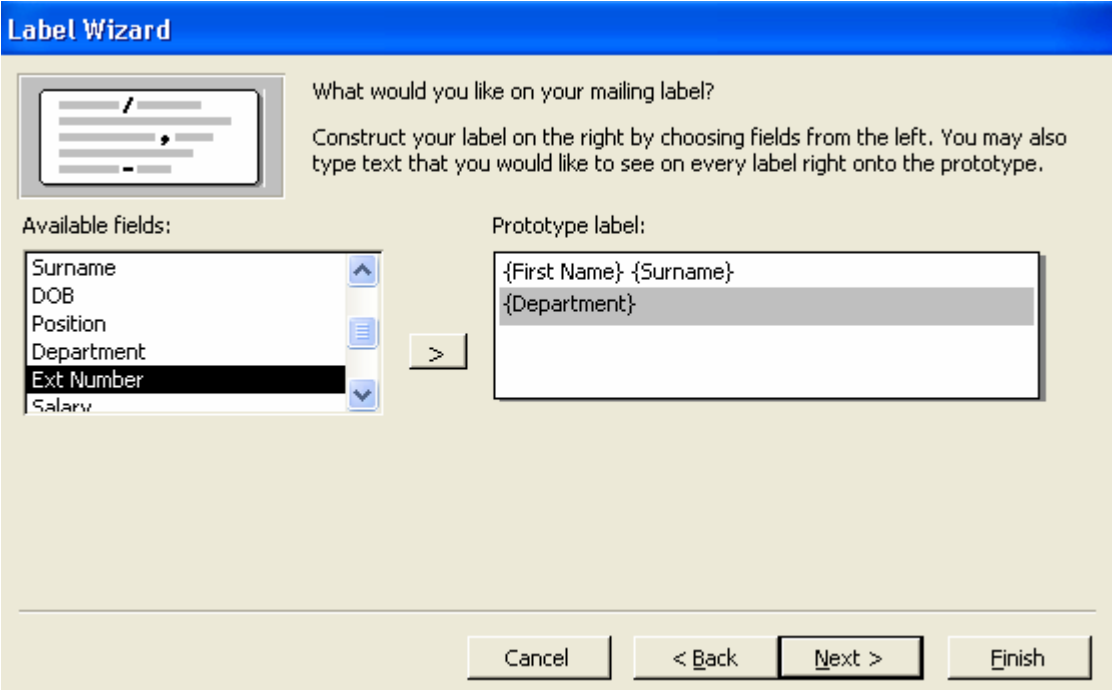
- You will be asked **What label size would you like?** Choose a label size and click the **Next** button.



- You will now be asked to choose the formatting for your text. Choose any font, font size, etc., and click the **Next** button.



7. You will then be asked which fields you would like to appear on your label. Select the **First Name** field and then click the  button.
8. Press the **<Spacebar>** to place a space between **First Name** and **Surname** fields.
9. Select the **Surname** field and click the  button, then press the **<Enter>** key.
10. Finally select the **Department** field and click the  button. Your screen should now look like the example shown.



Label Wizard

What would you like on your mailing label?

Construct your label on the right by choosing fields from the left. You may also type text that you would like to see on every label right onto the prototype.

Available fields:

- Surname
- DOB
- Position
- Department
- Ext Number**
- Salary

Prototype label:

{First Name} {Surname}
{Department}

Buttons: Cancel, < Back, Next >, Finish

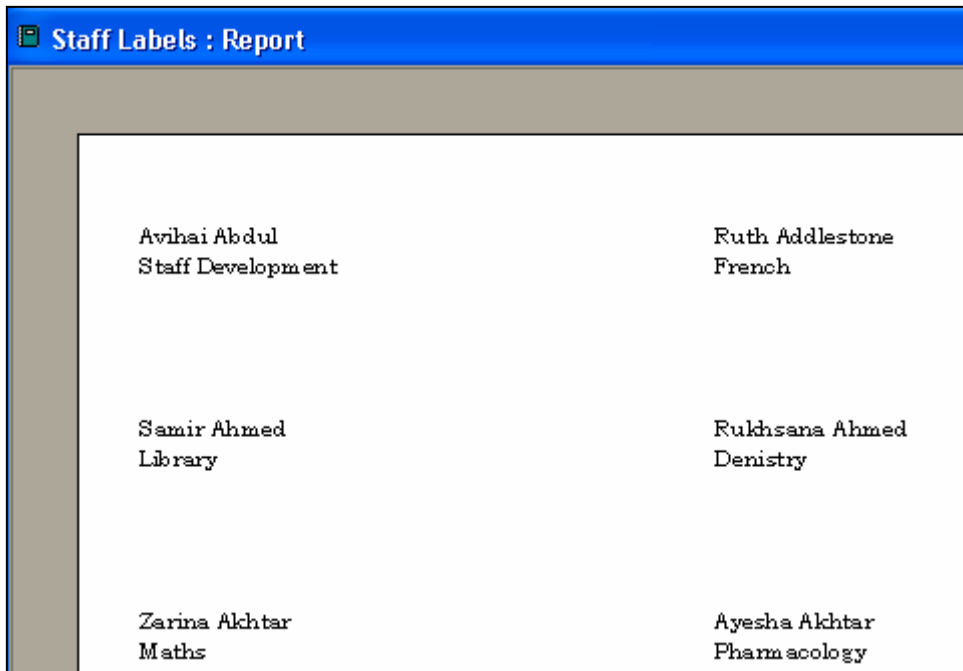
11. Click **Next** to move to the next screen.

12. The wizard will then ask you **Which fields would you like to sort by?** Select the **Surname** field and press the **>** button.

13. Click **Next** to continue.

14. The next screen will ask you to name your labels. Type **Staff Labels** and click the **Finish** button.

15. Your labels should look like the example shown.

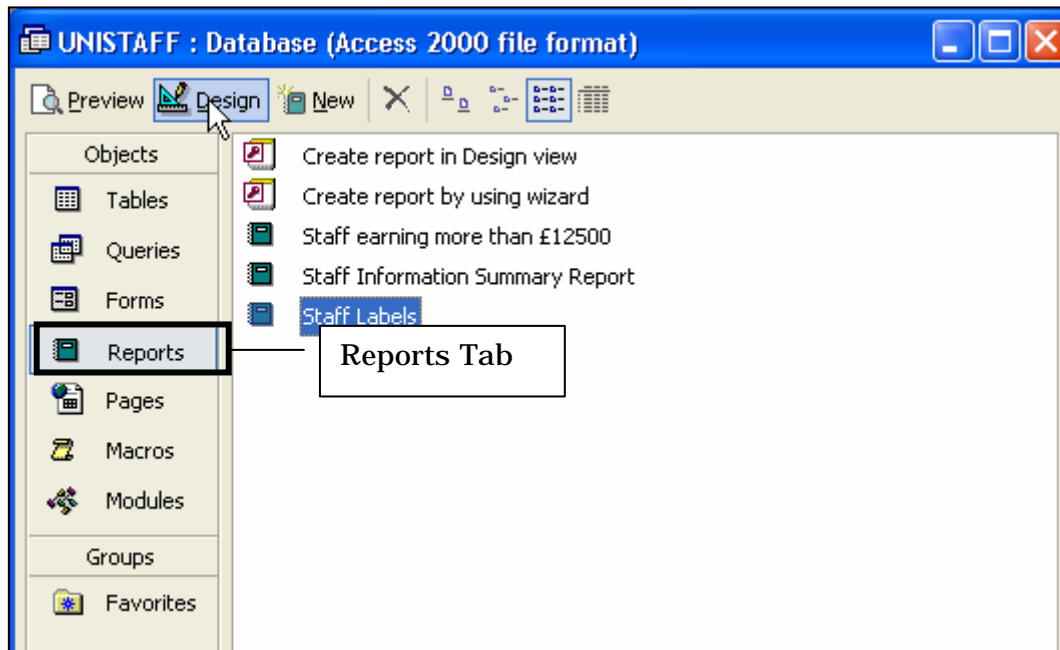


16. Close the labels window.

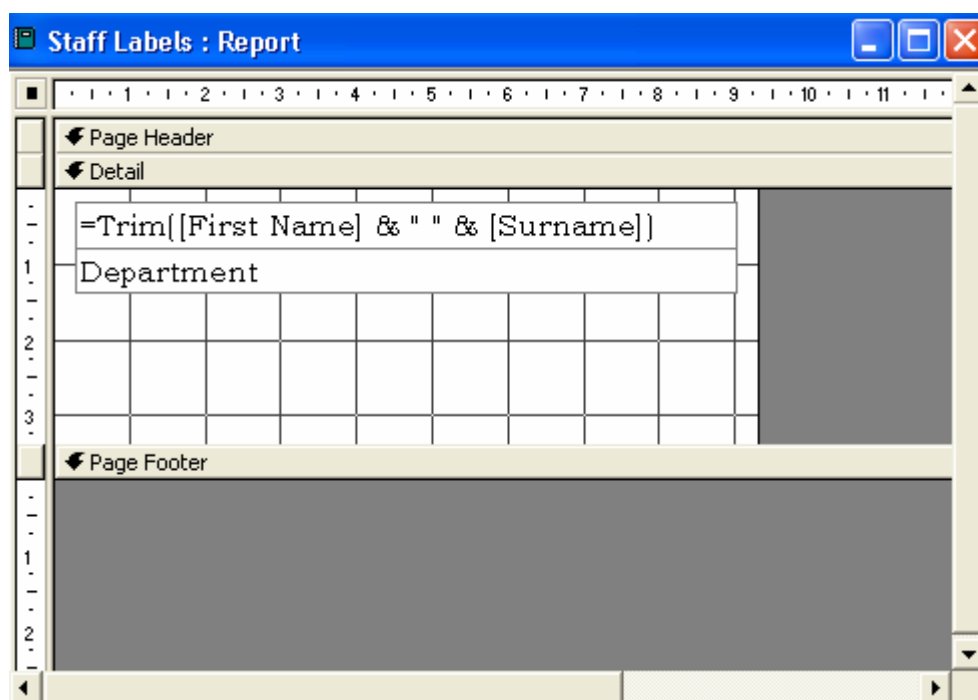
Activity 2 – Changing the Data Source for Mailing Labels

In this activity we are going to learn how to change the data source for our labels so that the design of the label remains the same but the data source is changed to read from a different table or query.

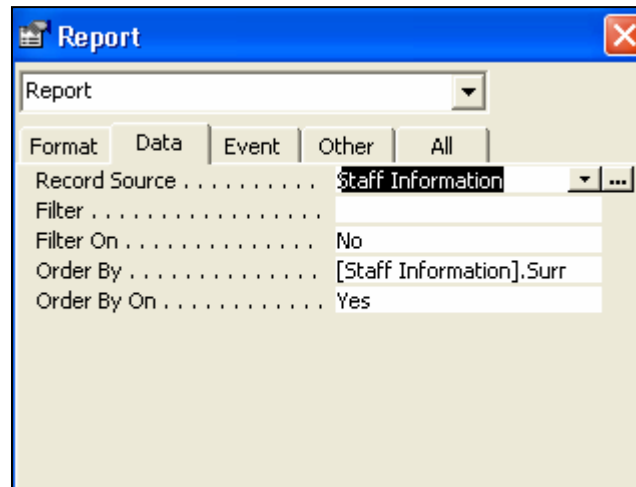
1. Click the **Report** tab on your **Database Window**.



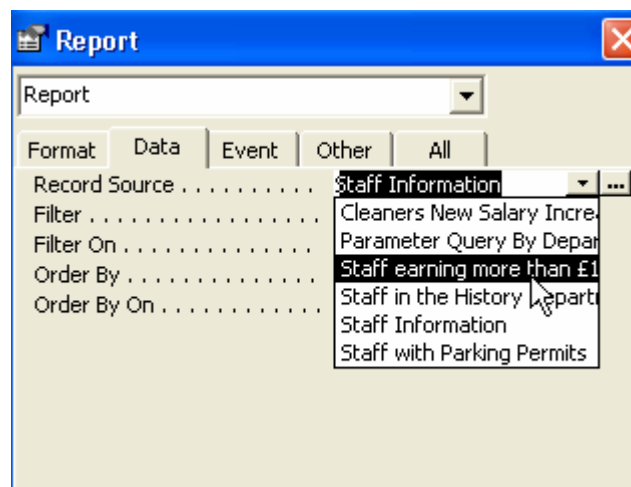
2. Select **Staff Labels** report and click on the **Design** button.
3. Your labels will appear in **Design View**.




- From the **View** menu choose the **Properties** command. The following dialog box will appear. Click the **Data** tab.

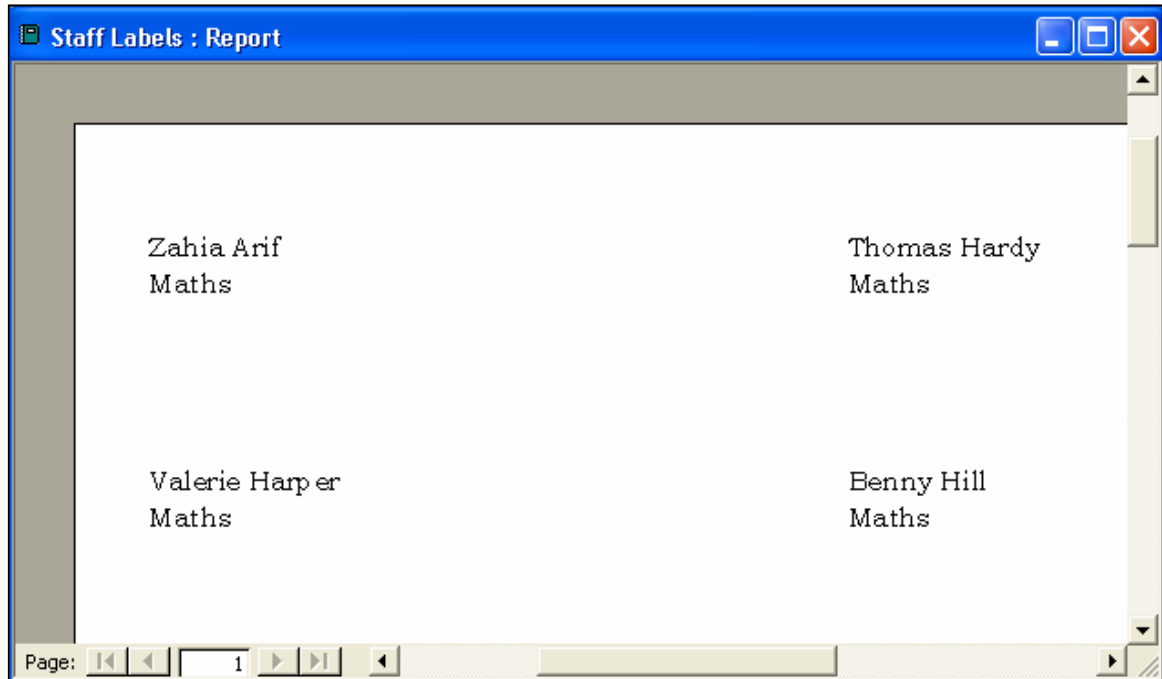


- In the **Record Source** cell click on the down arrow to reveal a list of tables and queries already created in your database.
- Select another table or query.



- This will now appear in the **Record Source** cell.

8. Click the print preview button . Your labels should appear with another set of data.



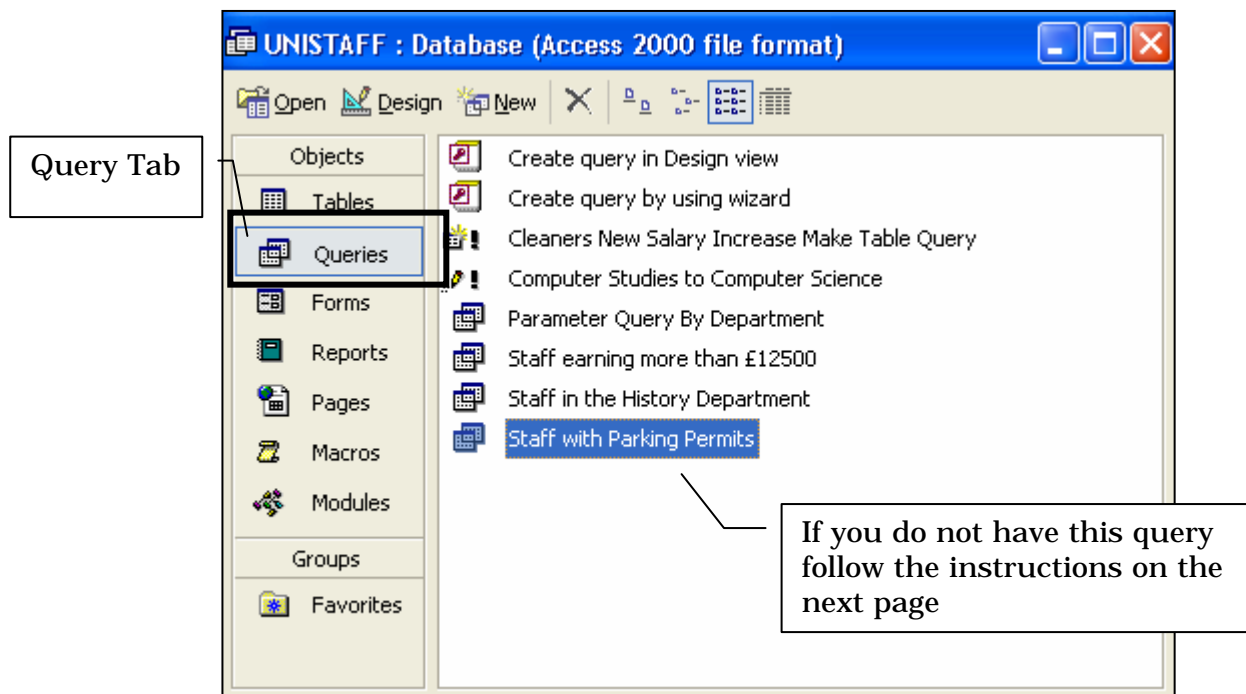
9. Close the report. You will be asked if you want to **Save changes to Report 'Staff Labels'?** Click the **Yes** button.

Mail Merge – Form Letters

Activity 3 – Selecting the table or query

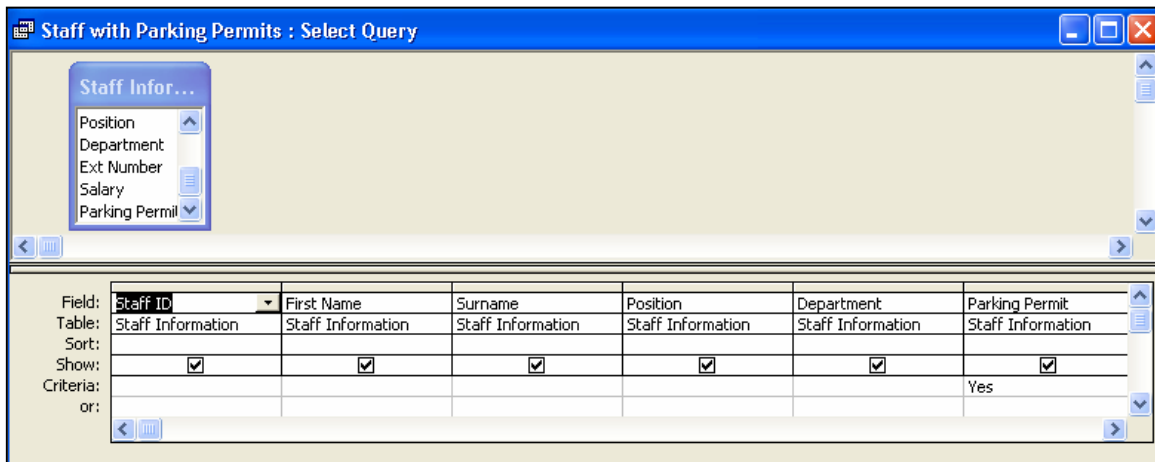
In this practical we are going to learn how to export data from an Access table or query to create form letters in Word. If you do not have the **Staff with Parking Permits query** needed for the exercise, follow the instructions on the next page to create it first.


1. On the **University Database Window** click the **Query Tab**.
2. Select the **Staff with Parking Permits** query.

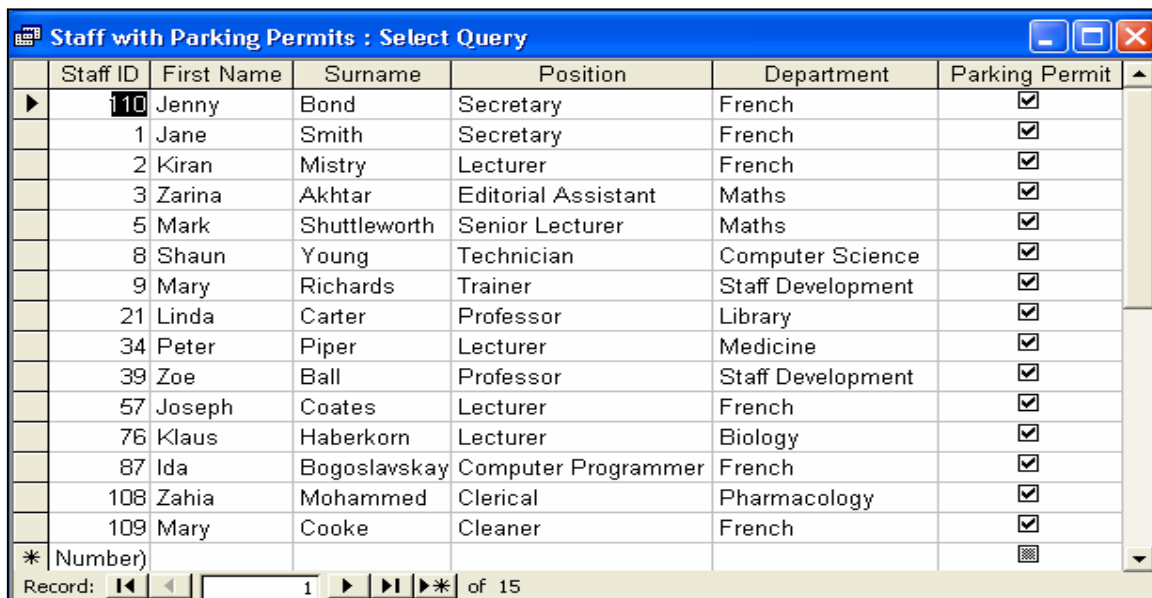


If this query has not been created, follow these simple steps:

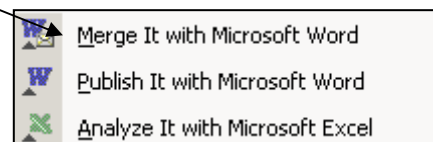
- ✎ Create a **New** query based on the **Staff Information** table.
- ✎ Using the following fields: **Staff ID, First Name, Surname, Position, Department** and **Parking Permit**, setting up a criterion **Yes** for all employees who have a Parking Permit.



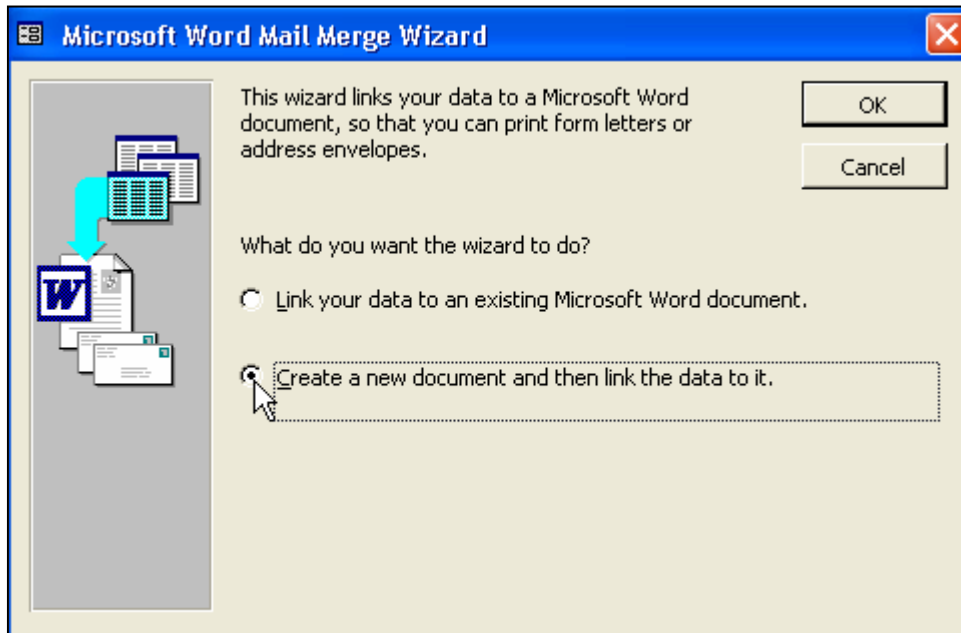
- ✎ Click the **datasheet** button  to view the results and save the query as **Staff with Parking Permits**.



3. Click the **Office Links** button  on the **Standard toolbar** and then select the option **Merge It with Microsoft Word**.



4. The **Microsoft Word Mail Merge Wizard** dialog box will appear.

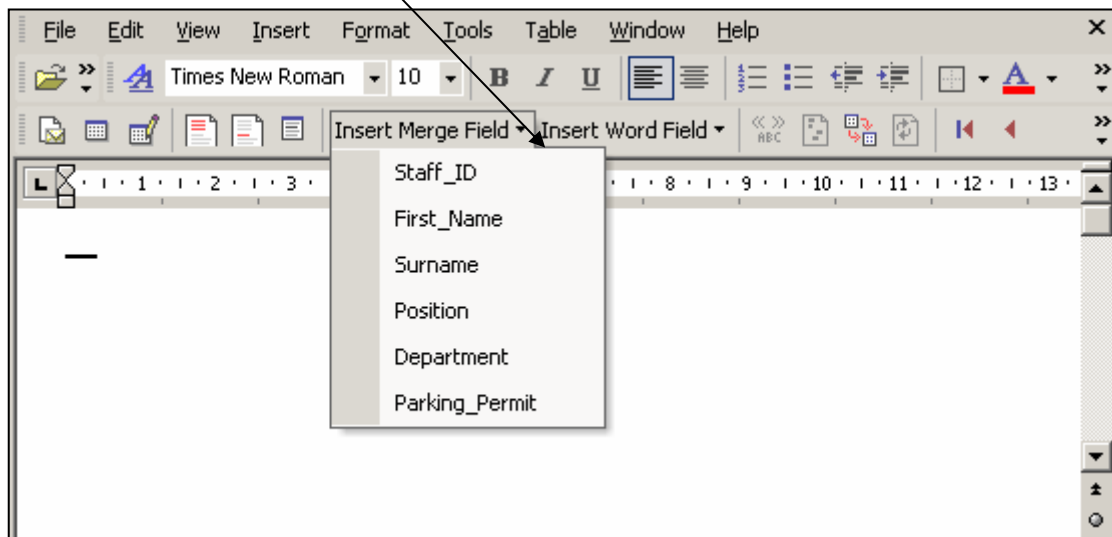


5. You will be asked: **What do you want the wizard to do?**
6. Click on **Create a new document and then link the data to it.**
7. This will allow you to create a new document in **Microsoft Word.**

Activity 4 – Creating the WORD Document

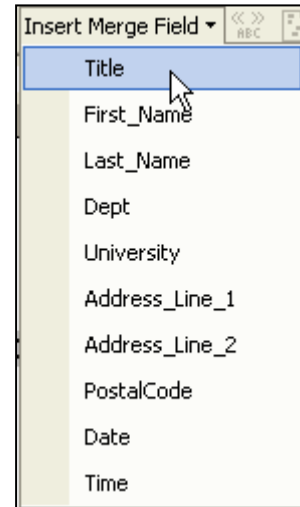
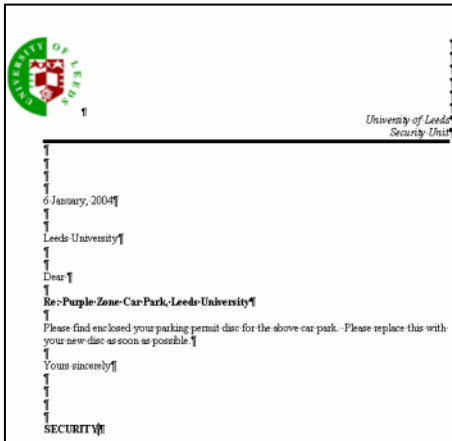
1. The **Mail Merge Wizard** will take you into **Word** and a new document will open up.

NB: The **Mail Merge Toolbar** has appeared and the fields that were set up in the query have also been listed under the **Insert Merge Field** button.



TIP: The Insert Merge Field button can be placed on the Mail Merge Toolbar from Tools Menu, Customize.

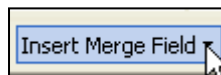
- To save you typing this letter click the **File** command from the **Insert** menu. Find the document called **FORMLET.doc**. A letter that looks similar to the example shown will be placed into your document.



- In this example we will be using the following fields: **First Name**, **Surname** and **Department**.

- Click on the line above the words **Leeds University**.

- Click the **Insert Merge Field** button on the **Mail Merge Toolbar**.



- A list of fields from the **Staff with parking permits** query will appear in a drop down menu box.



- Click on the **First_Name** field. Press your **<Spacebar>** once and then click in the **Insert Merge Field** button again. Click the **Surname** field. Press the **<Enter>** key to insert a new line. Now, click the **Insert Merge Field** button

again and then click the **Department** field. Finally, place a space after the word **Dear** in your letter and insert the **First_Name** field again.

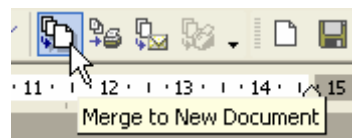
8. Your letter should now look like the example shown.

```

15·November·2002¶
¶
«First_Name»·«Surname»¶
«Department»¶
Leeds·University¶
¶
¶
Dear·«First_Name»¶
¶
Re:·Purple·Zone·Car·Park,·Leeds·University¶

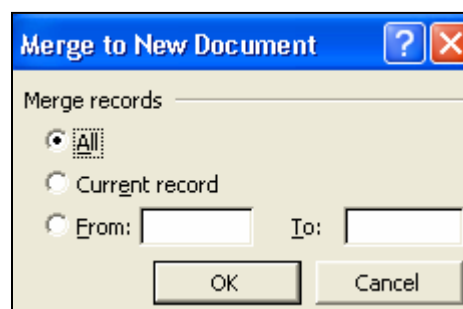
```

9. Save the document as **Parking.doc**.



10. Click the **Merge to New Document** button.

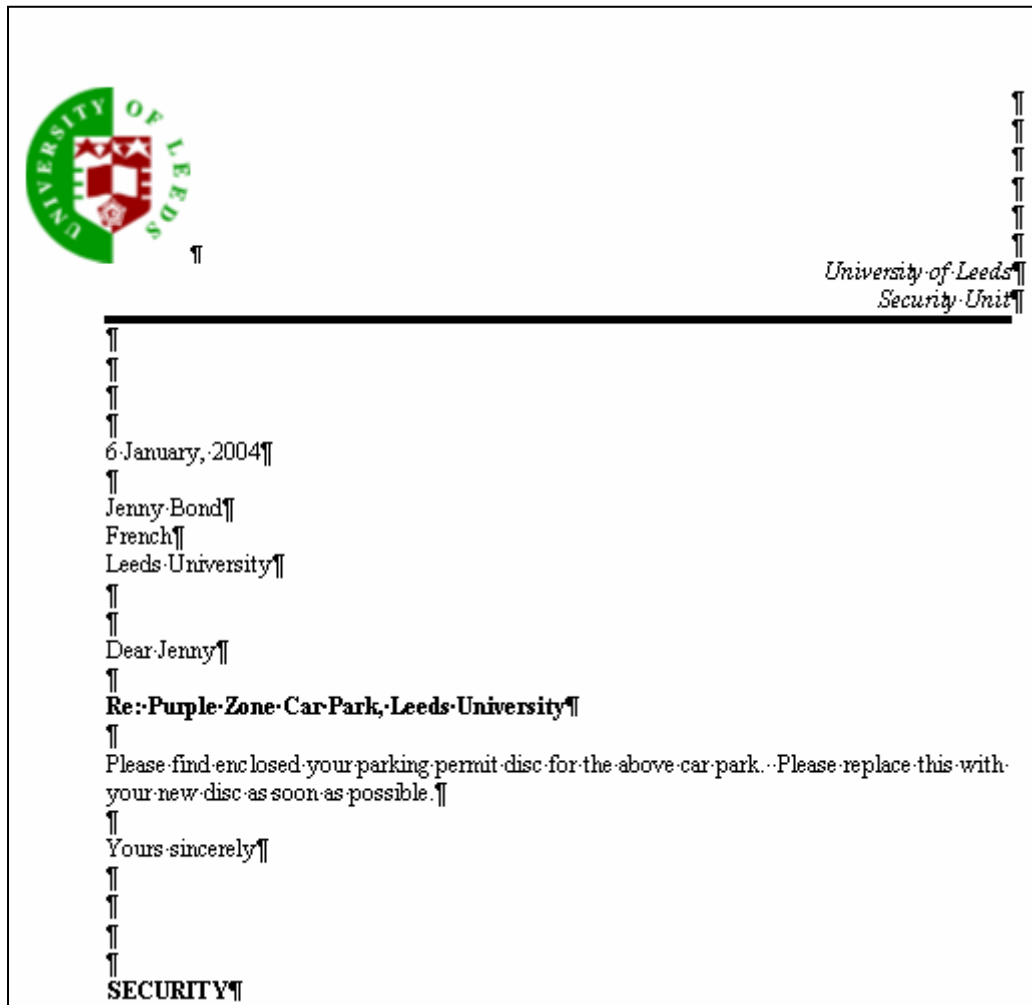
11. A **Merge to New Document** dialog box will appear asking you what records you want to be merged. We will merge **All** records.



12. Click the **OK** button.

13. Print preview will display an example of the merged records, ready for printing.

This is an example of one of the letters:

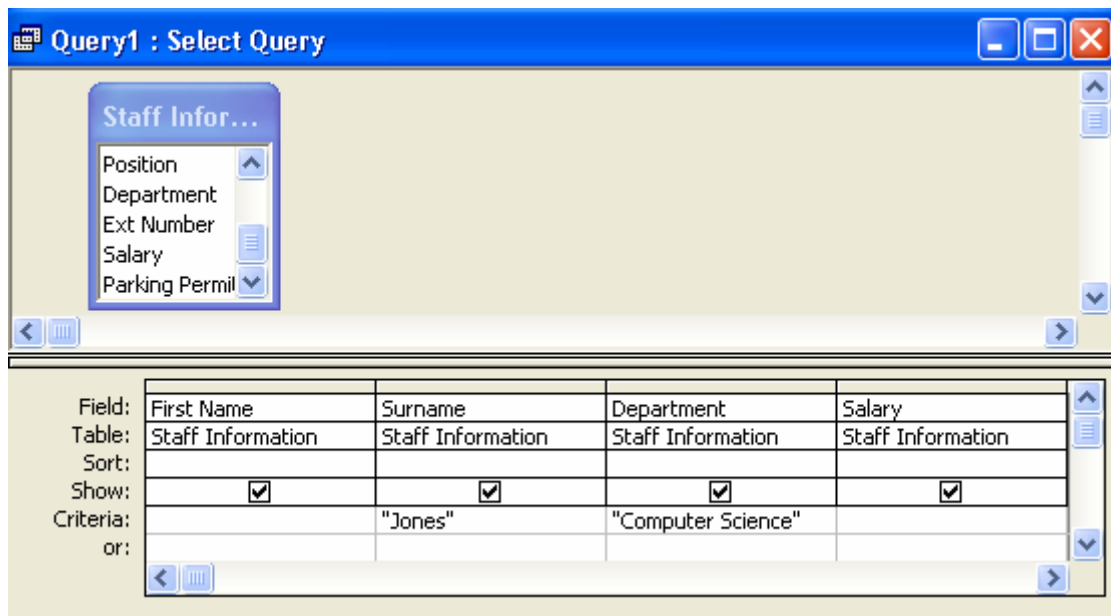


14. Press **Print** to print out the letters.

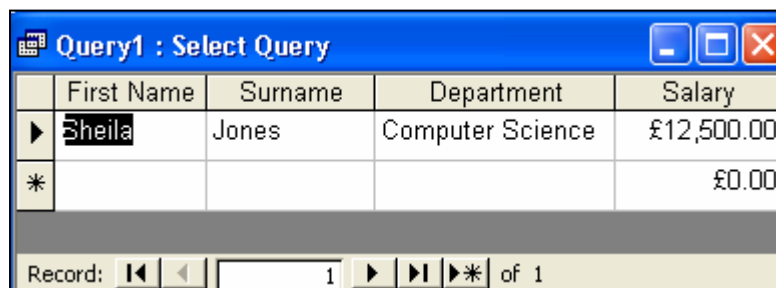
Mail Merge – Form Letter with a Link

Activity 5 – Linking a Table/Query with an Existing Word Document


1. Click the **Query Tab** on the **Database Window** and create a new query using the **Staff Information** table.
2. Using the following fields, **First Name**, **Surname**, **Department** and **Salary**, set up a query to find the following person: **Jones, Computer Science**.

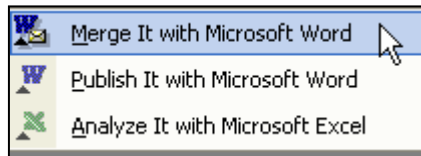


3. Click the **datasheet** button to view the details of this employee.

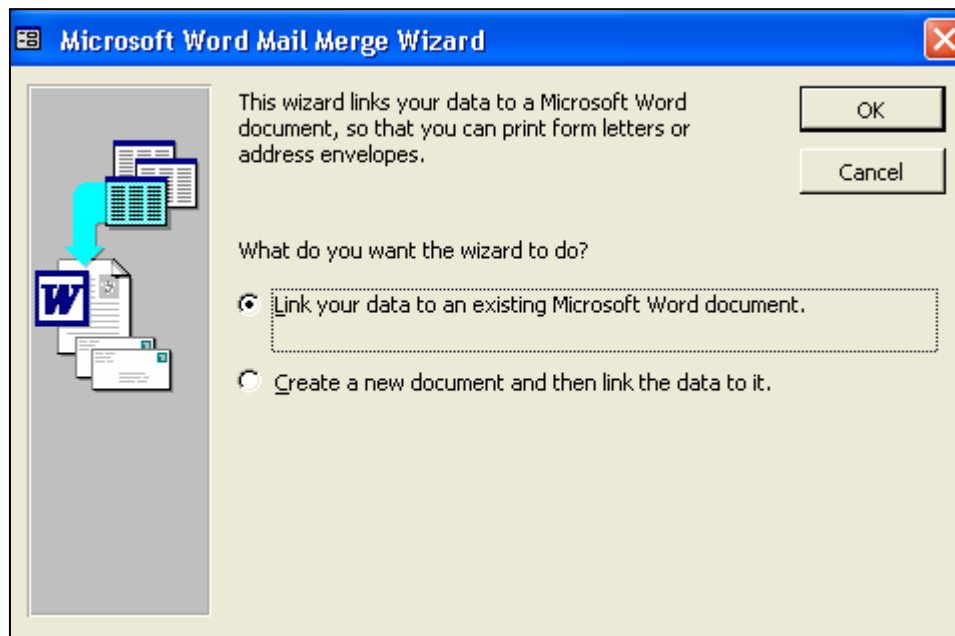


4. Save the query as **Staff Promotion Query**.

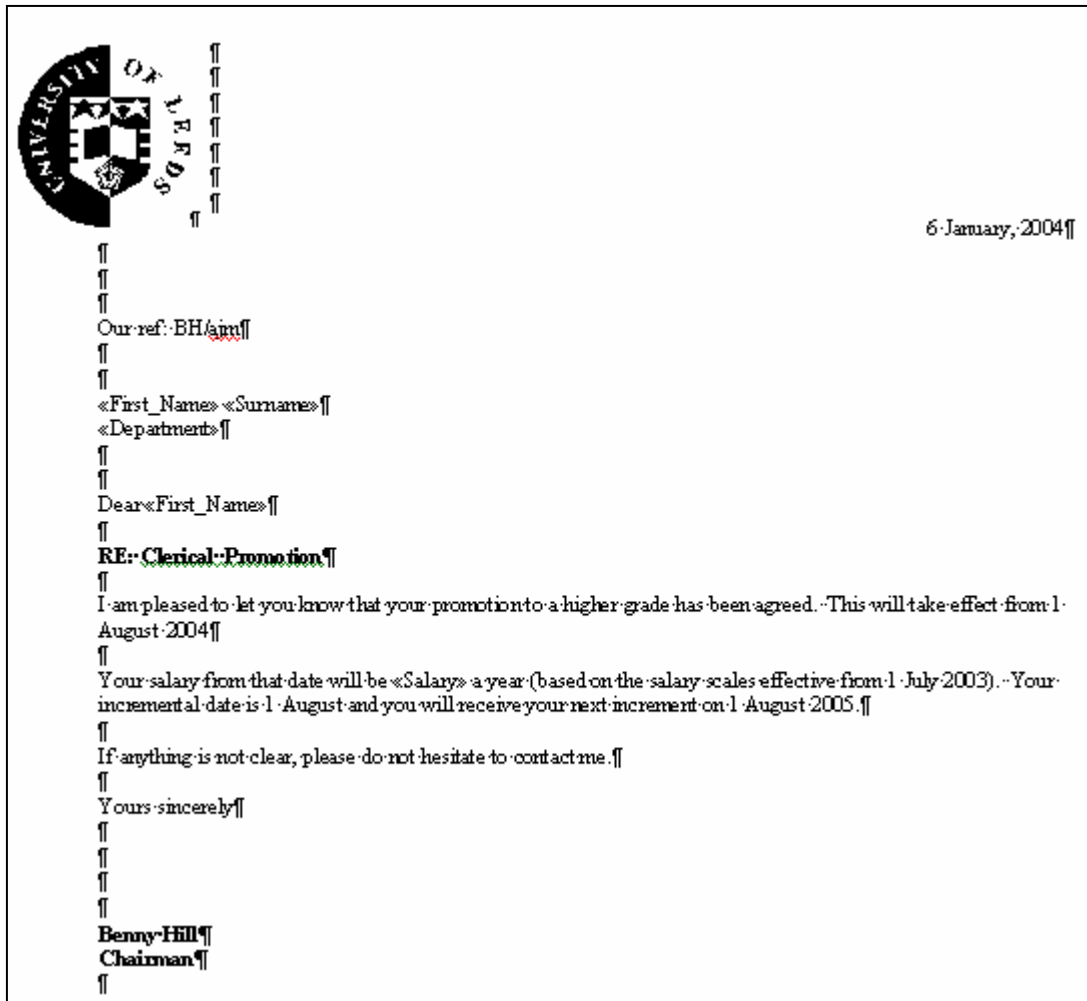
5. We are now going to merge this query with a letter that has already been created in **Word**.
6. Select **Staff Promotion Query** from the query list. Then click the **Merge it** button  on the **Standard toolbar** and select the **Merge It with Microsoft Word** option from the drop down list.



7. A **Microsoft Word Mail Merge Wizard** dialog box will appear:

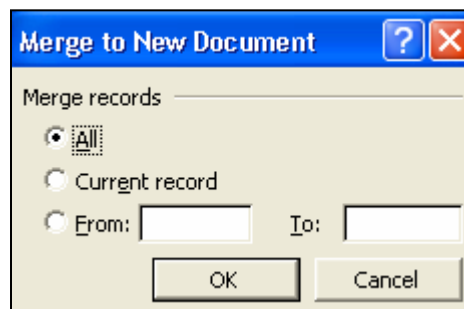


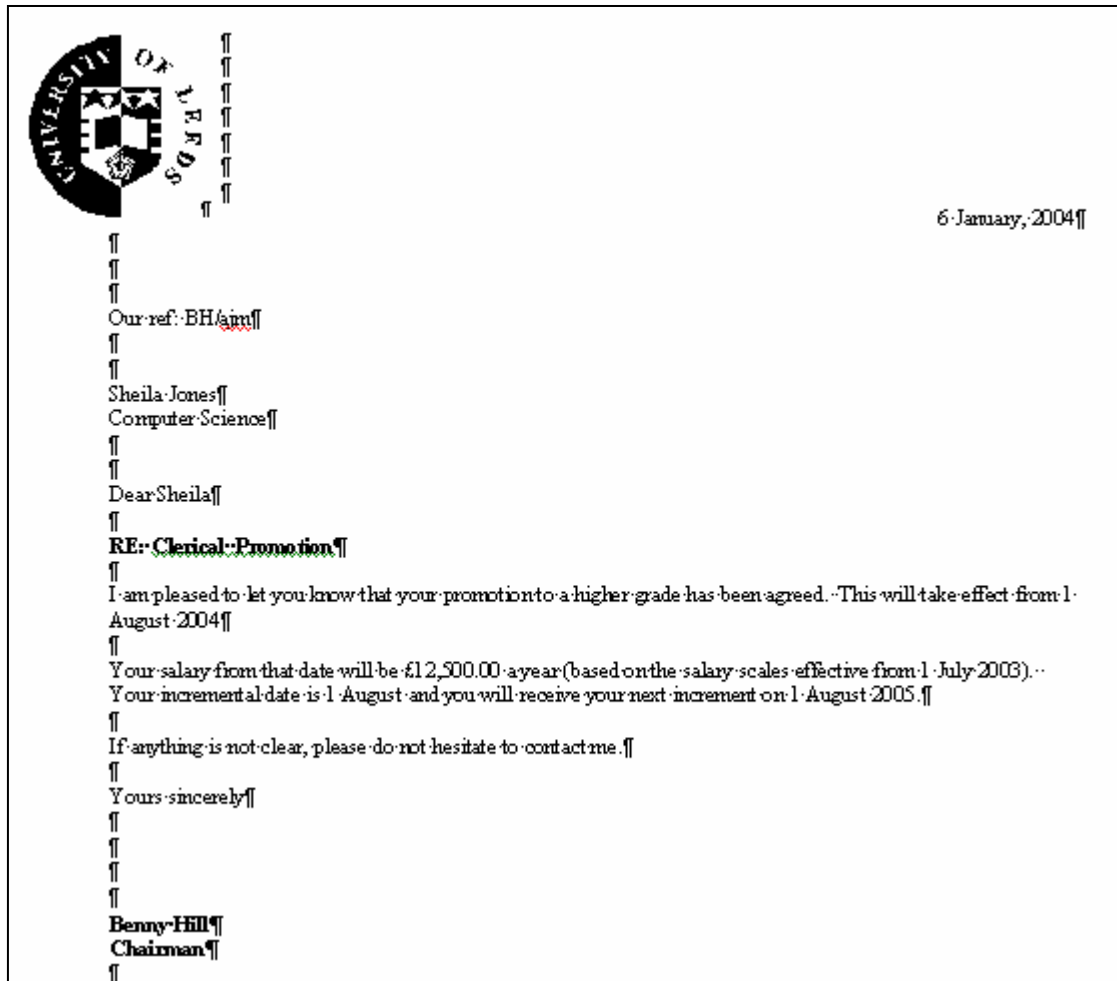
8. We are going to use the **Link your data to an existing Microsoft Word document** option. This is the default option on the wizard so all we have to do is click the **OK** button.
9. The **Select Microsoft Word Document** dialog box will appear. Select the file called **Promotion.doc** and click the **OK** button.
10. The document will open up, ready for merging.



11. Click the **Mail Merge**  button to produce the merge.

12. In the **Merge to New Document** dialog box, click the **OK** button.



13. **Print preview** will display the letter:

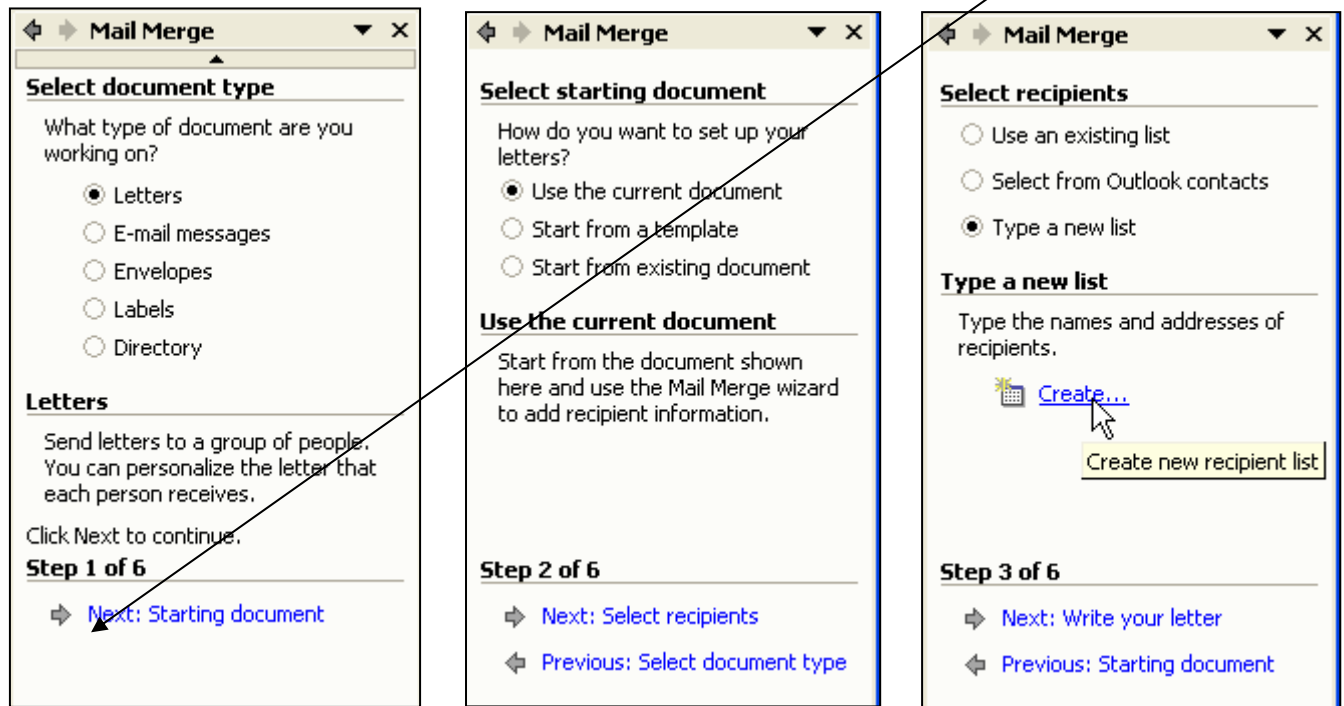
Word MAIL-MERGE

Creating and Printing Merged Documents

In **Microsoft Word** you can create a merged document which is a form letter in which customised information is combined with repetitive text. To create a merged document, two files have to be created. The **main document** that contains the standardised text and the **data source** that contains the information, e.g. names, addresses, etc. Merged fields are placed in the main document to indicate where the variable information is to appear.

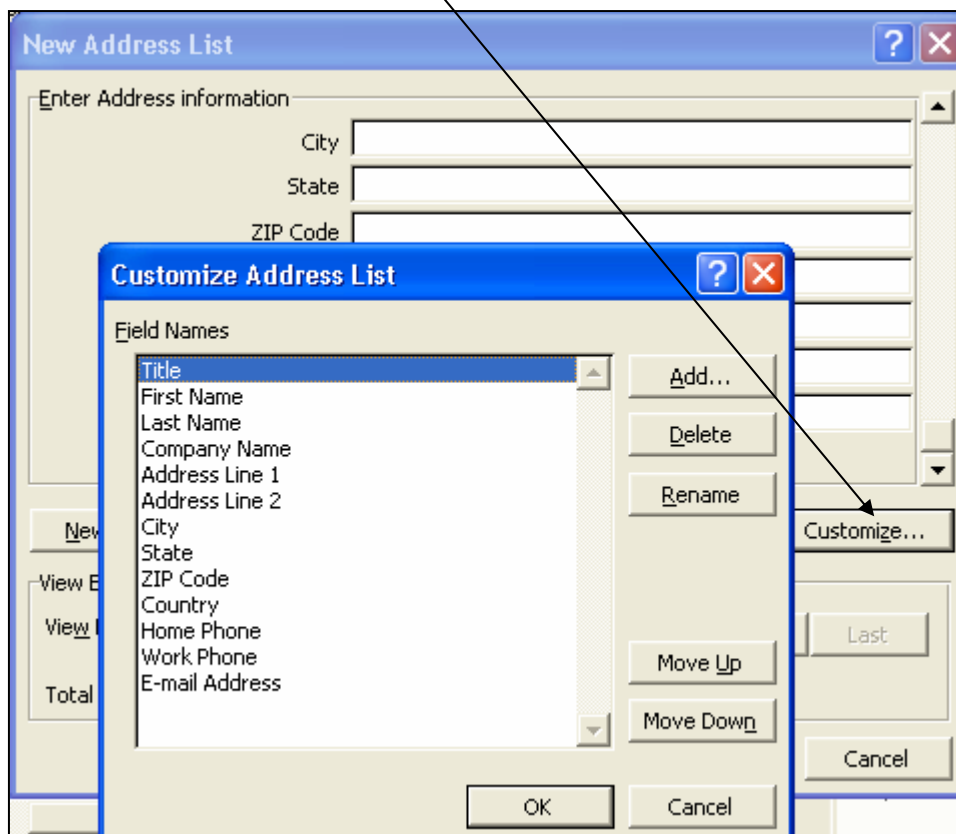
Activity 1 – Creating a main document

1. On the **Standard Toolbar**, click the **New** button to open a new document.
2. Under the **Tools Menu**, click **Letters and Mailings** and then **Mail Merge Wizard**.
3. Follow the Steps shown in the diagrams below to create the letter and list, and click the arrows to move on to the next step.



NB: You can use the suggested fields already provided in the box, or remove the ones you do not want or add your own.

4. Next click **Customize**.
5. From the **Customize Address List** remove the following fields by selecting them individually and then clicking the **Delete** button.
6. **Company, City, State, Home Phone, Work Phone** and **E-mail Address**.

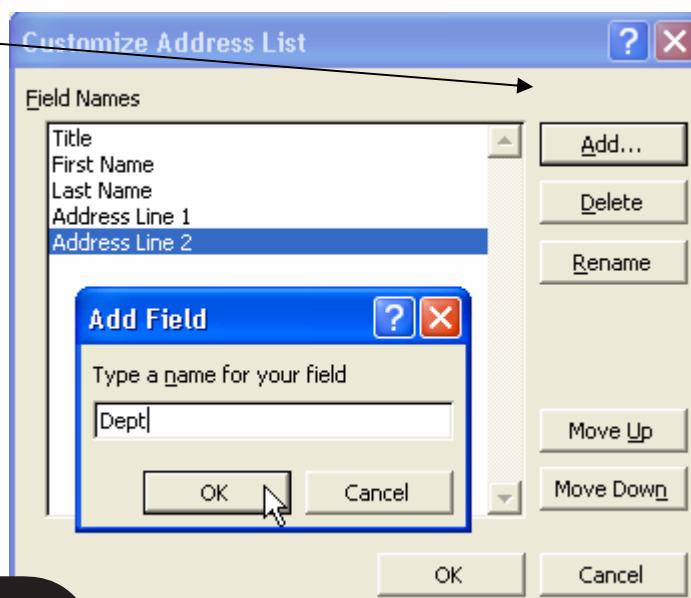


7. Next we will insert some new fields.

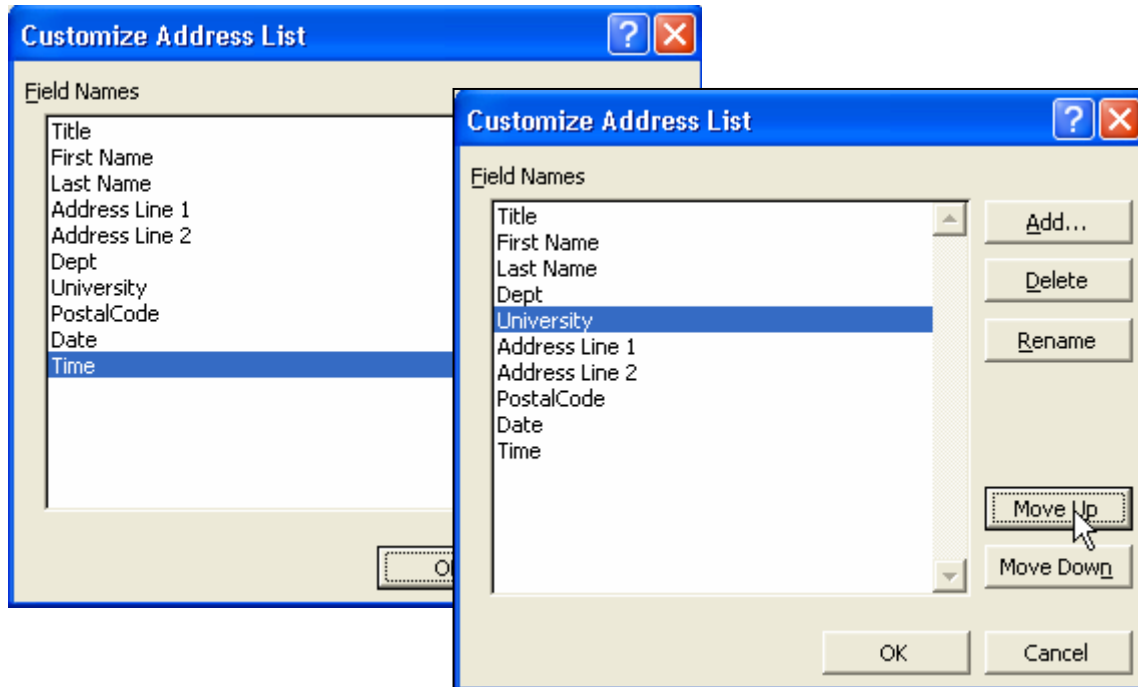
8. Click the **Add** button and in the **Add Field** box, include the following fields in the list:

9. **Dept, University, PostalCode, Date** and **Time**.

10. Click the **<OK>** button each time you add a new field.



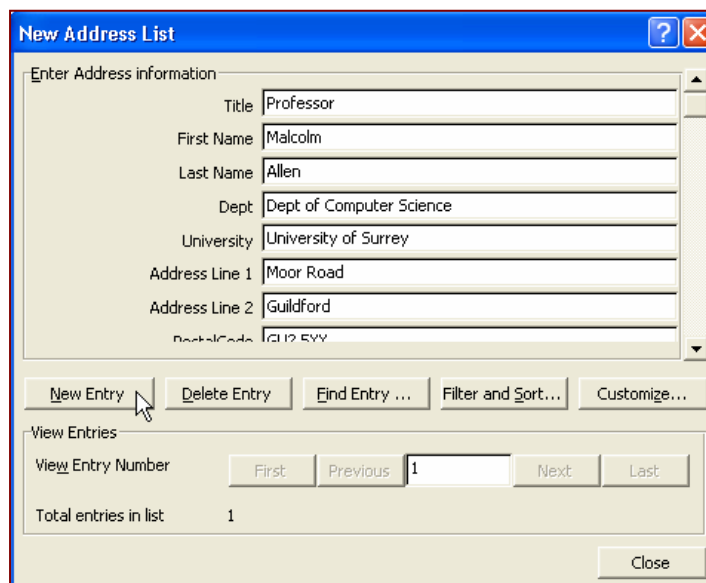
11. Click the **OK** button.
12. A new list of **Field Names** is listed in the box.



NB: Fields can be placed in a specific order by selecting them in the **Field Names** and clicking the **Move Up/Move Down** buttons.

Activity 2 – Entering records

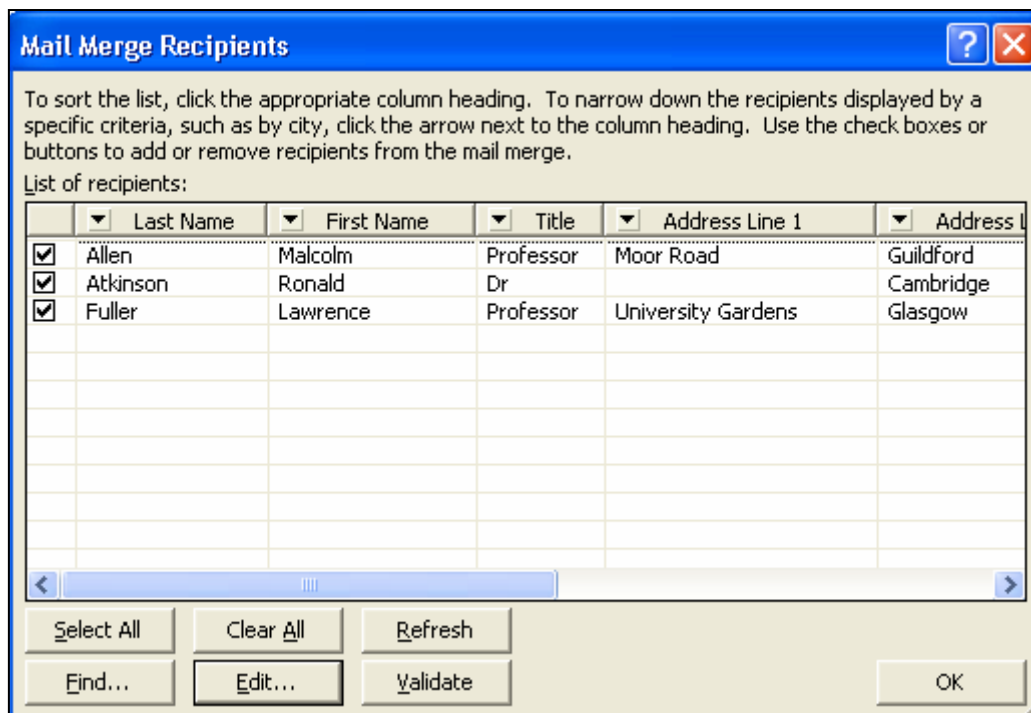
1. In the **New Address List** window, add a **New Entry**.



2. Enter the following **three** records:

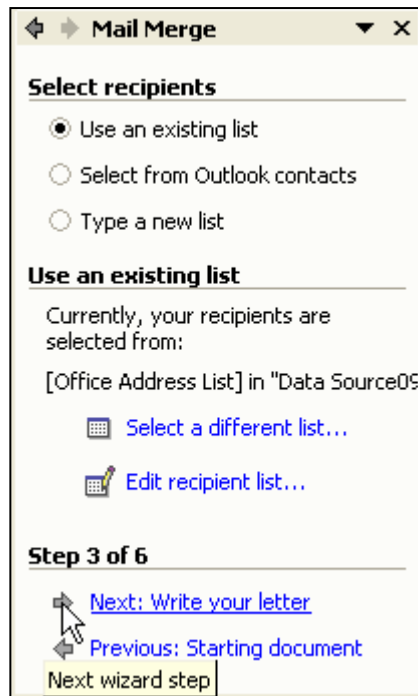
Title:	Professor	Dr	Professor
FirstName	Malcolm	Ronald	Lawrence
LastName	Allen	Atkinson	Fuller
University	University of Surrey	University of Cambridge	University of Glasgow
Dept.	Dept. of Computer Science	Faculty of Engineering	Dept. of Applied Mathematics
Address1	Moor Road		University Gardens
Address2	Guildford	Cambridge	Glasgow
PostalCode	GU2 5XH	CB3 9EW	G12 8QG
Date	9 February 2003	16 March 2003	22 April 2003
Time	2.00 pm	11.00 am	4.00 pm

3. Click the **Add New** button record or press the **ENTER** button to enter another record.
4. Click **Close** once the records have been entered.
5. **Save** the data source into the **My Data Sources** folder as **Speakers**.
6. Your records will appear in the **Mail Merge Recipients** dialog box.
7. Click **OK** to return to the Wizard and move on to the next step.

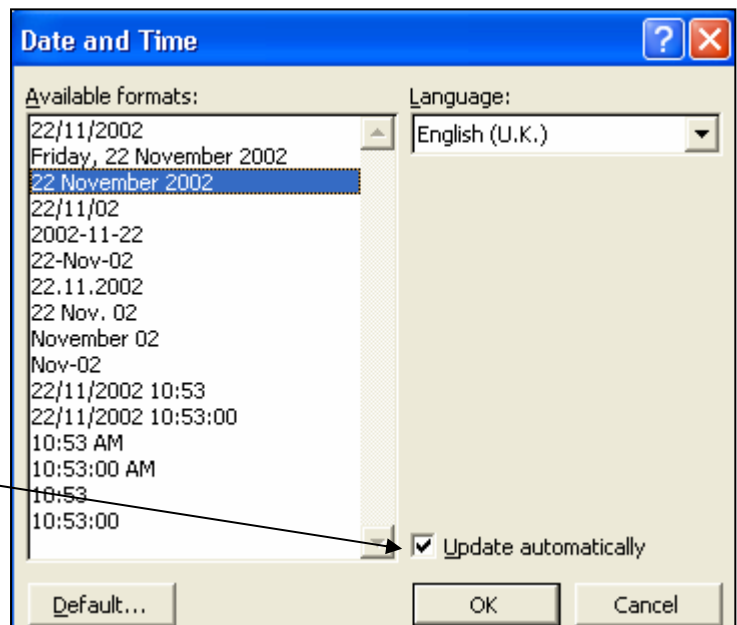


Activity 3 – Preparing the main document

1. Now that the data source is complete we are ready to prepare the main document that will contain the field names.
2. Click **Step 3 of 6: Next: Write your letter.**



3. Place the cursor at the top of the page.
4. First insert the date.
5. Under the **Insert Menu**, click **Date and Time**.
6. Select one of the formats:
7. Click the **Update automatically** box and click **OK**.
8. Press the **ENTER** key twice to leave a blank line beneath the **Date**.



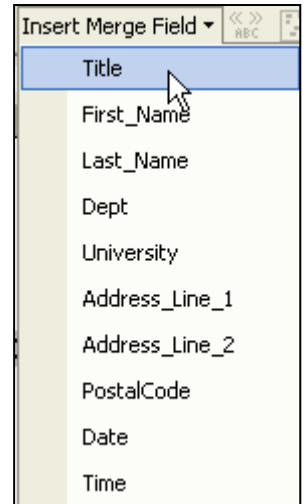
NB: This will automatically update the date each time the document is opened.

Activity 4 – Enter Fields into the Main Document

1. Next click the **Insert Merge Field** button on the Toolbar.

TIP: The Insert Merge Field button can be placed on the Mail Merge Toolbar from Tools Menu, Customize.

2. Click the **Title** field to insert this into your document.
3. Next, press the **<Spacebar>** to insert a blank space between **Title** and **First_Name**.
4. Click **First_Name**.
5. Continuing in this way, select the following fields and place them into your document using the following example as a guide.



```

02 April 2001¶
¶
«Title» «FirstName» «LastName»¶
«Dept»¶
«University»¶
«Address1»¶
«Address2»¶
«PostalCode»¶
¶
¶
Dear «Title»«LastName»¶
¶
Thank you for agreeing to attend our Seminar on «Date». Your talk will be at «Time», but
we hope you will be able to arrive in time for lunch at 1.00pm.¶
¶
If you have not already done so, would you please send me a short abstract of your talk.¶
¶
I enclose a campus map (including one of Leeds City Centre) with some important features
outlined.¶
¶
Yours sincerely¶
¶
¶
Professor A. C. Scott¶
School of Mathematics¶
    
```

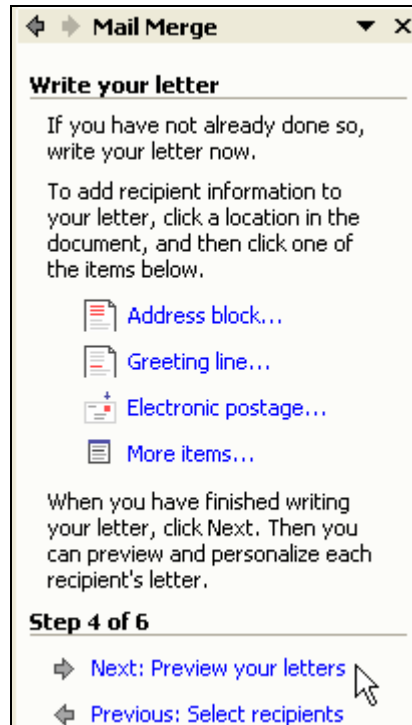
Field

←
←
←

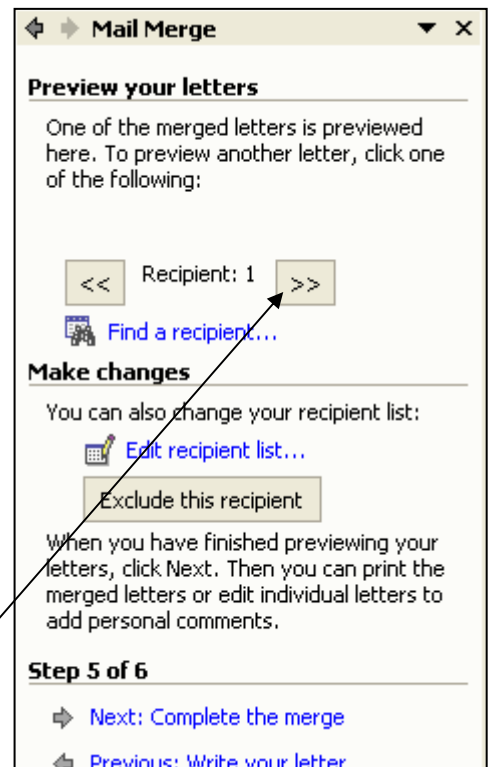
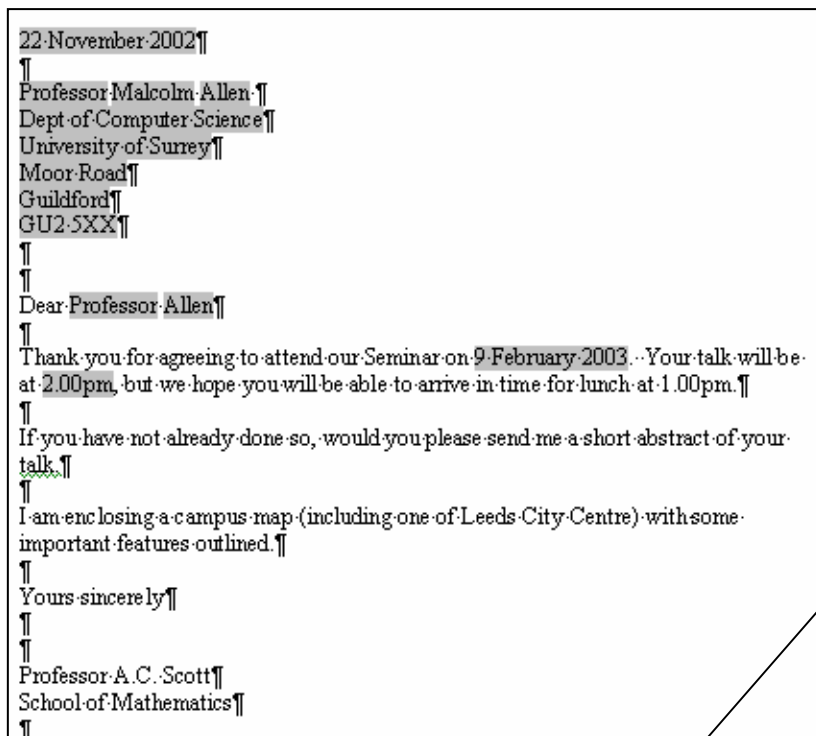
6. Type the main body of the letter, inserting the fields, **Date** and **Time** of the Seminar in the appropriate places.
7. Next save the letter as **Speakers Letter** into the **Templates** folder.

Activity 5 – Merging documents

- Now that the data source and the document are ready, we can go ahead and merge the two.



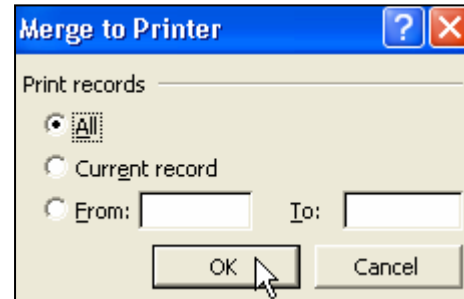
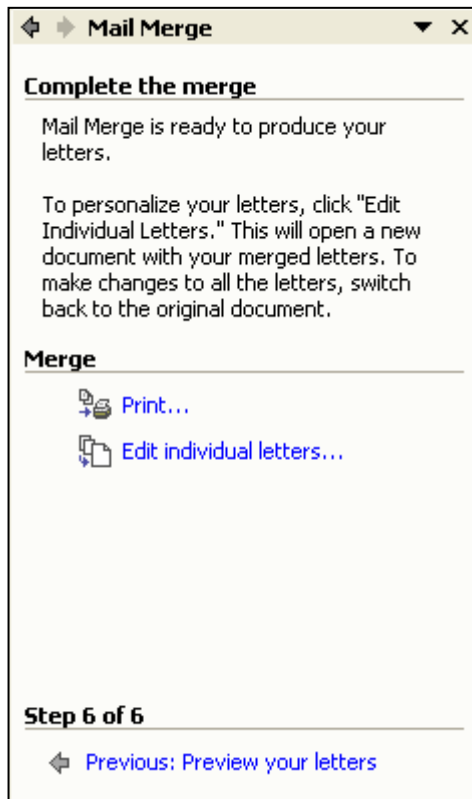
Click on **Step 4 of 6 Next: Preview your letters.**



Use the double arrows to preview another letter

2. Finally Click **Step 5 of 6 Next: Complete the merge.**
3. Click **Print** to print out the letters.

NB: You can use the **Edit individual letters** option to edit the letters further.

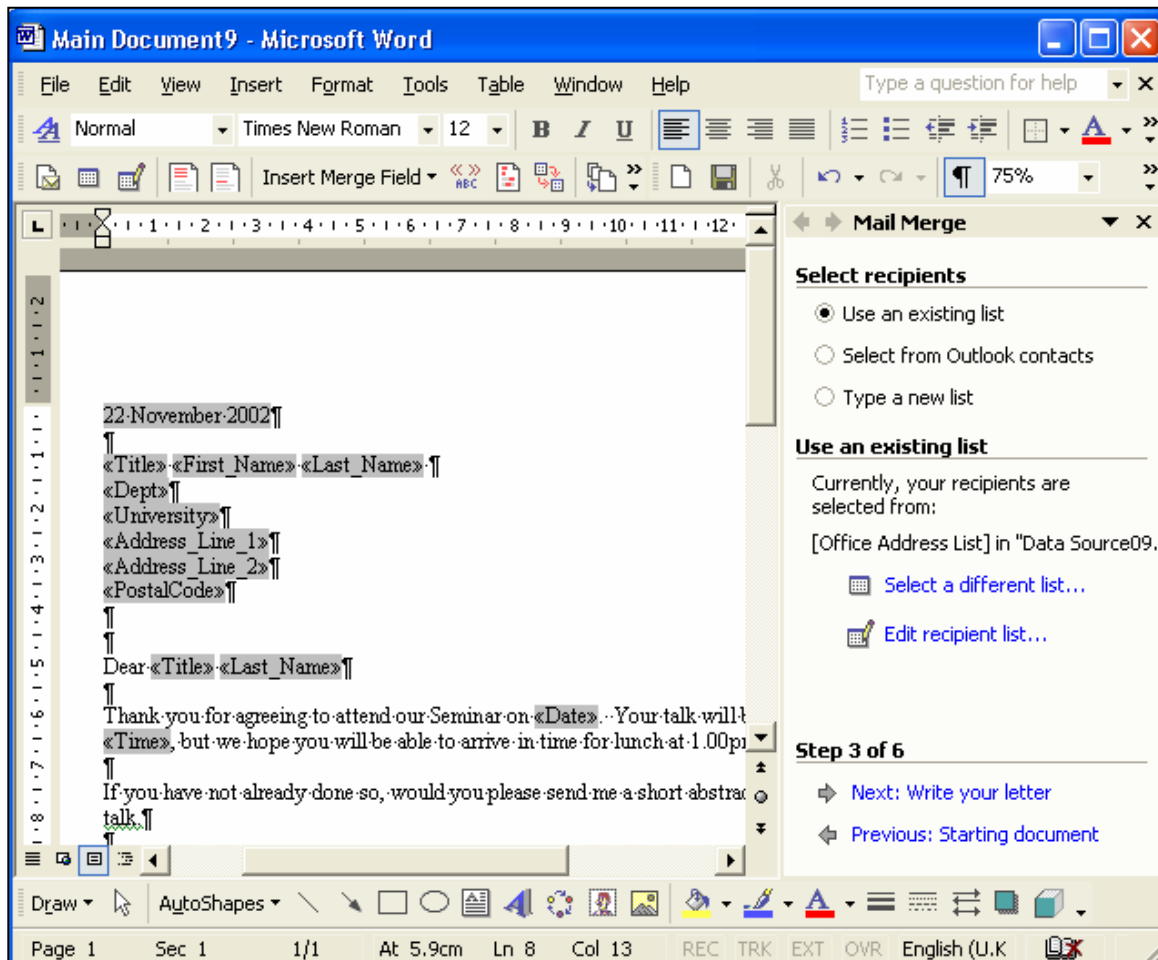


4. The data source will merge with the main document, producing the letters.
5. The letters are ready to be printed out.
6. Close the **Form Letter1** document and do not **Save**.
7. It is not necessary to save this document as it only contains the form letters.

Activity 6 – Changing the Data Source

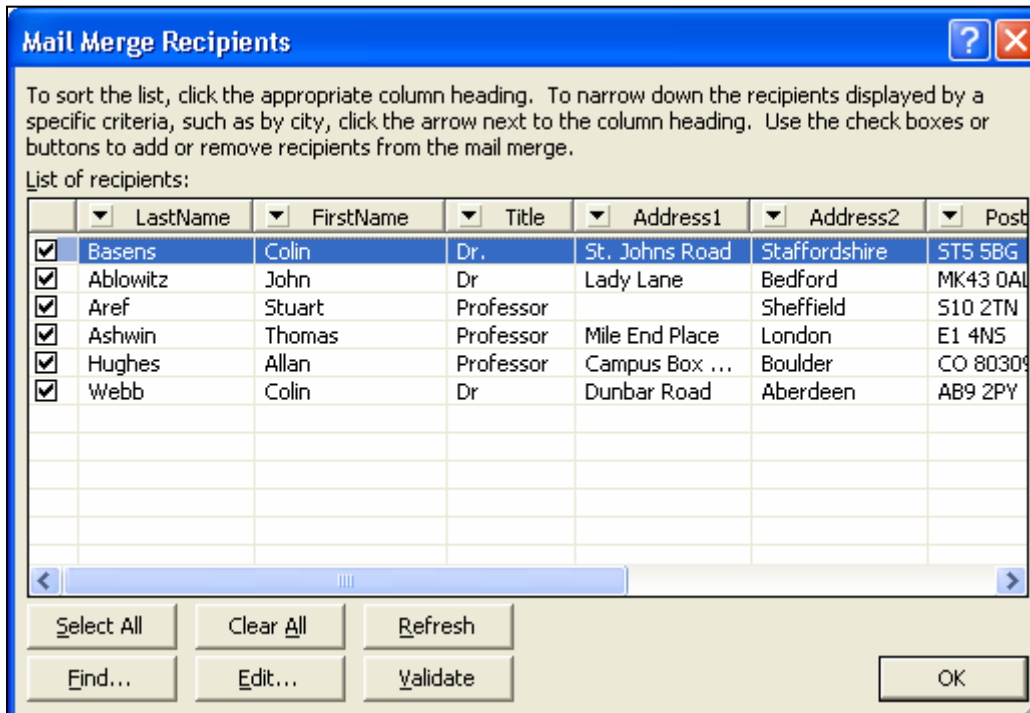
You can use other data sources with your main document as long as they contain the same fields. We will use the file **Extra Data Source09** with our main document called **Speakers Letter**

1. Open Speakers Letter from the General Templates folder.
2. Under the **Tools Menu**, click **Letters and Mailings** and then **Mail Merge Wizard**.



3. Click **Select a different list ...** in the **Task Pane**.
4. Locate and double click **Extra Data Source09**.

5. A new list of recipients will appear.



6. Click **OK**.

NB: You can deselect any records you do not wish to include by removing the ticks.

7. In the document window, click the **Merge to New Document** button to run the mail merge.

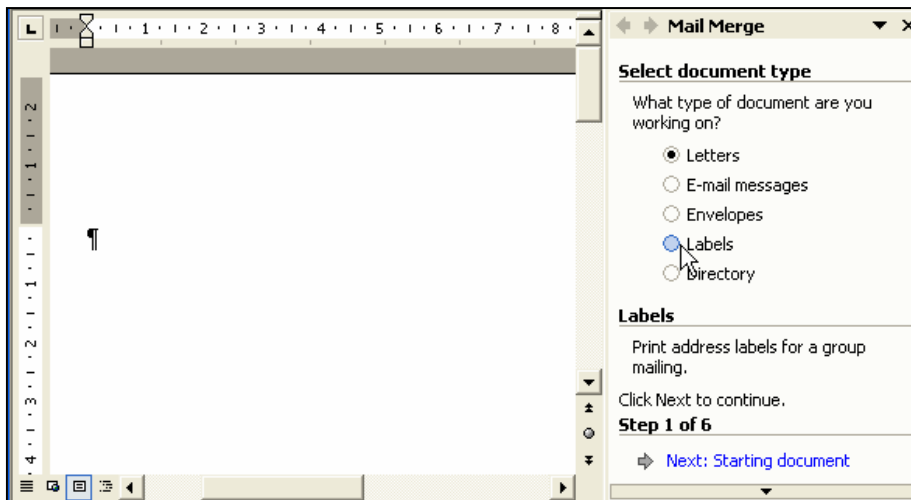


8. Word merges the document with the new data source.
9. **Close** the document.
10. **Save Speakers Letter**.

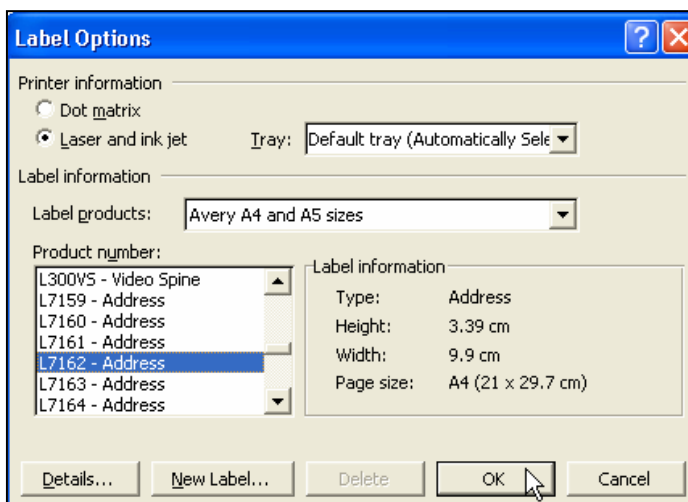
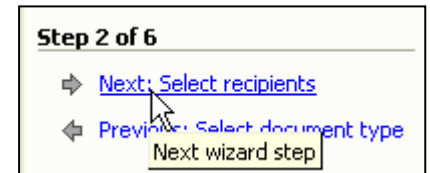
Activity 7 – Creating Mailing Labels

Using the same procedure for merging documents, we can also produce labels.

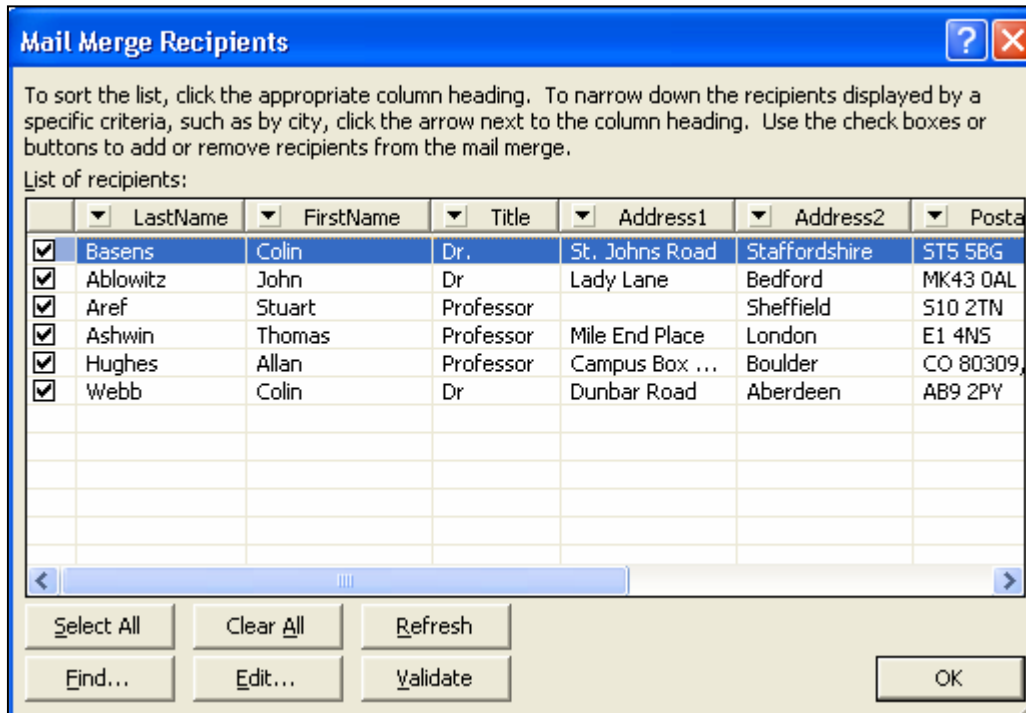
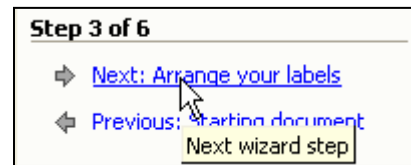
1. On the **Standard Toolbar**, click the **New** button to open a new document.
2. Under the **Tools Menu**, click **Letters and Mailing** and then **Mail Merge Wizard**.
3. In the **Mail Merge** task pane, click **Labels** and then **Next: Starting document**.



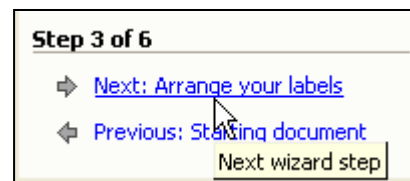
4. Click **Next: Select recipients**.
5. In the **Label Options** dialog box, choose **L7162** which can be found in under **Avery A4 and A5** sizes and click the **OK** button.



6. Click **Next: Arrange your labels**.
7. In the **Select Data Source** dialog box, locate **Extra Data Source09** and click **OK**.



8. A list of **Mail Merge Recipients** will appear.
9. Click **OK**.
10. Click **Next: Arrange your labels**.



11. Click into the first label on the layout sheet and click **More Items**.
12. This will list the field names in your database.



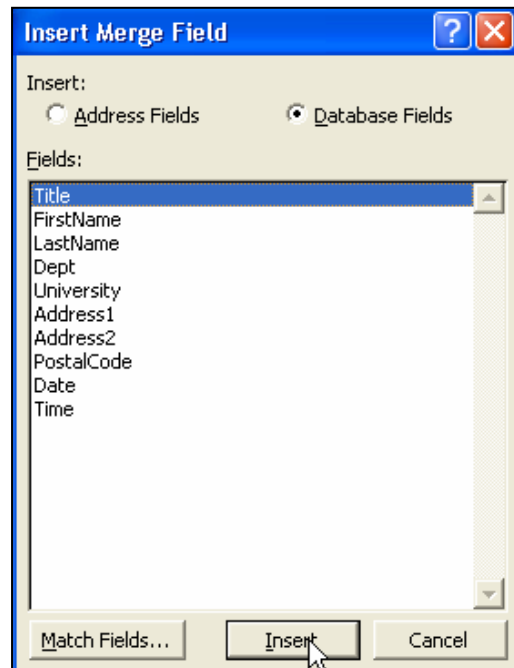
13. Select **Title** and click the **Insert** button.

NB: this field will be placed in the first line of the first label.

14. Click **Close**.

15. Using this procedure, and the following example, insert the fields and place them in the appropriate places with spaces, new lines, etc.

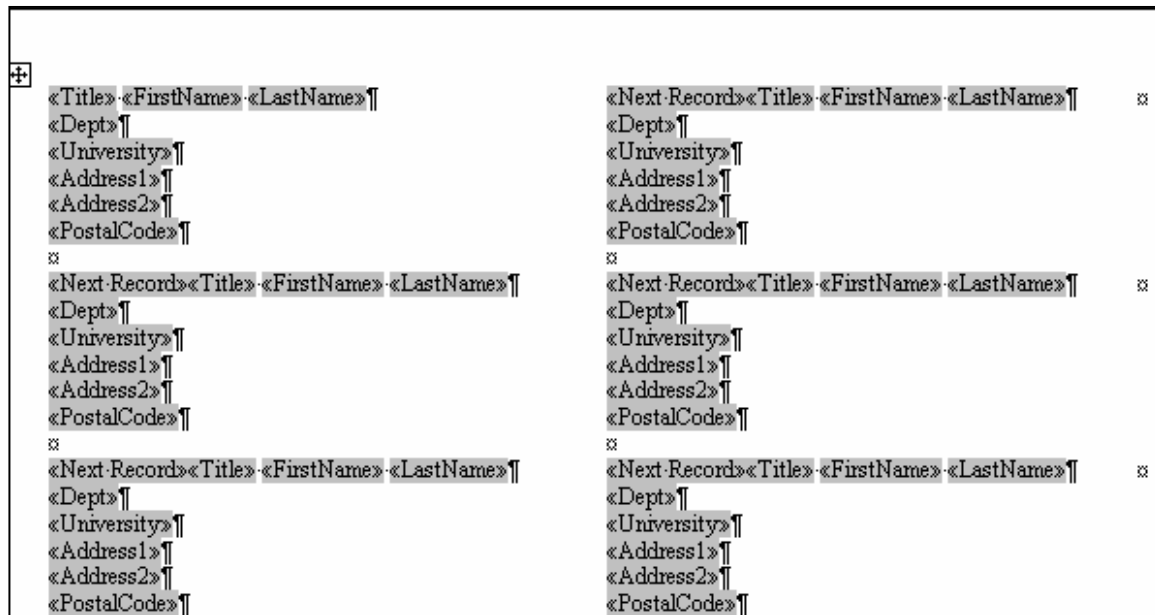
```
«Title»·«FirstName»·«LastName»¶
«Dept»¶
«University»¶
«Address1»¶
«Address2»¶
«PostalCode»¶
□
```



16. Click **Update all labels**. This will copy the layout of your first label to the other labels.



Your document should look like the diagram below:



17. **Save** the label document into your **Templates** folder as **Labels**.
18. Click **Next: Preview your labels**.
19. The merged label document will appear and you are ready to print the labels.

Activity 8 – Reusing the Label document

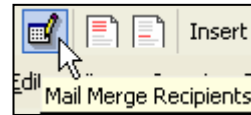
20. Reopen **Labels** from the **Templates** folder.

21. Under the **Tools Menu**, click **Letters and Mailings** and then **Mail Merge Wizard**.



22. To toggle between the layout and the merged data, click the **View Merged Data** button.

23. To view the data source click the **Mail Merge Recipients** button.



24. To run the mail merge, click the **Merge to New Document**.



Mail Merge Recipients

To sort the list, click the appropriate column heading. To narrow down the recipients displayed by a specific criteria, such as by city, click the arrow next to the column heading. Use the check boxes or buttons to add or remove recipients from the mail merge.

List of recipients:

	▼ LastName	▼ FirstName	▼ Title	▼ Address1	▼ Address2	▼ PostalCode	▼ D...	▼ University	▼ D...	▼ Ti...
<input checked="" type="checkbox"/>	Basens	Colin	Dr.	St. Johns Road	Staffordshire	ST5 5BG	Dept o...	University of Keele	5 Janu...	2.30 pm
<input checked="" type="checkbox"/>	Ablowitz	John	Dr	Lady Lane	Bedford	MK43 0AL	Eco Te...	Cranfield Institu...	16 Fe...	3.30 pm
<input checked="" type="checkbox"/>	Aref	Stuart	Professor		Sheffield	S10 2TN	Aeron...	College of Aeron...	24 Ma...	4.30 pm
<input checked="" type="checkbox"/>	Ashwin	Thomas	Professor	Mile End Place	London	E1 4NS	Dept o...	Queen Mary Coll...	22 Apr...	11.00 ...
<input checked="" type="checkbox"/>	Hughes	Allan	Professor	Campus Box ...	Boulder	CO 80309, USA	Progra...	University of Col...	22 Apr...	2.00 pm
<input checked="" type="checkbox"/>	Webb	Colin	Dr	Dunbar Road	Aberdeen	AB9 2PY	Dept. ...	University of Ab...	18 Au...	3.00 pm

Select All Clear All Refresh

Find... Edit... Validate OK

Author	Training Team Information Systems Services University of Leeds
Date	November 2003
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Edition	1.0
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