

Word Mail Merge

Skills for the Electronic Workplace

Overview

In this course you will be using Word to prepare merged documents relating to the Canadian Cybernetics Conference. A conference of this nature requires a variety of documents, including letters and emails to attendees, a conference program, lists of attendees, etc. You will prepare these documents using the Mail Merge features of Word 2002.

There is a lot of information about Mail Merge online at Microsoft at:

<http://support.microsoft.com/default.aspx?scid=fh;EN-US;wd2002mail&product=wd2002>

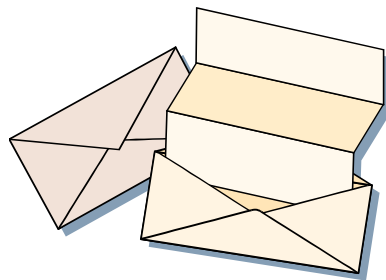


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Mail Merge Overview

As part of your job of organizing the Canadian Cybernetics Conference you will find yourself creating or accessing many lists of people's names for various reasons: lists of the members of the organizational committee, lists of invited and confirmed speakers, lists of people who have registered to attend the conference, etc. Some of these lists you will maintain yourself directly through Word, some will be maintained by you or other committee members in an Excel spreadsheet or an Access database. People may maintain other lists, perhaps at other institutions, using software that you don't have on your computer. However, they can, and do, dump out these lists as plain text files (usually referred to as ASCII files) with the fields in the lists separated by commas, or colons. They send you these lists, frequently as Email attachments.

How will you use these lists? You will use the information contained in them to create: personalized letters or emails, mailing labels or envelopes; personalized conference schedules; lists of conference attendees and assigned residence rooms sorted by attendee name, or sorted by room number; lists of attendees who have opted to attend a specific event. You will also use these lists to generate personalized email to conference participants. You will prepare all the above documents using the Merge features in Word.

Mail Merge Steps

To carry out a mail merge in Word, you start with the Mail Merge Wizard, which is found in the Tools menu. The wizard steps you through creating:

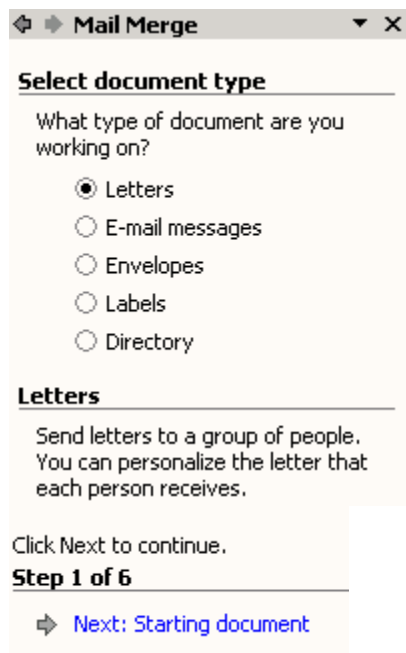
Main Document	This is the skeleton of the final document into which you wish to merge information to create form letters, mailing labels, catalogues, departmental directories, etc.
Data Source	The data source contains the information that will be merged into the main document. The data source document can be another Word document, an Excel spreadsheet, an Access database or a delimited ASCII file. The data source file consists of "records" and every "record" consists of "fields". In the case of an ASCII file, a delimiter character, such as a TAB, a comma or a semicolon separates the fields.
Fields and Records	<p>A field is a specific piece of information that will be merged into a main document. It might be a person's last name, the room number in which a specific conference session will be held, or a flag indicating whether or not someone has paid their registration fee.</p> <p>A record is the complete set of fields for a conference registrant, a conference speaker, etc. Every record of a data source contains an identical set of fields, in the same order.</p> <p>If the data source is a Word document, a record is a row of a table, and fields are table cells. A table column will contain all like fields, for example "last name". Usually, the first row of the table will contain the names assigned to the fields.</p> <p>Similarly, if the data source is an Excel spreadsheet, a record is a row of the spreadsheet, each cell contains a field, and a column contains all equivalent fields. The first row usually contains the names of the fields.</p>

Mail Merge and Creation of the Data File

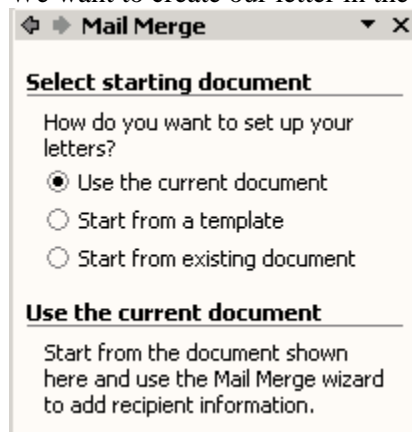
As conference co-ordinator, you wish to send form letters to the members of the conference program committee. This is a small list, only about 10 people. You opt to create the data source via the Word Mail Merge Wizard.

Starting the Mail Merge

14. If Word is not already started, start it now.
15. Begin the mail merge process by choosing **Tools**→**Letters and Mailings**→**Mail Merge Wizard**. The wizard will appear in the task pane on the right side of your screen.



16. Since we want letters, we will leave *Letters* selected, and at the bottom of the pane, click *Next*.
17. We want to create our letter in the current empty document, leave *Use current document* checked.

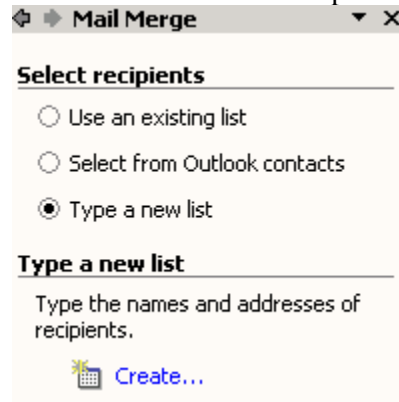


Step 2 of 6

- Next: [Select recipients](#)
- Previous: [Select document type](#)

Click *Next* to select recipients.

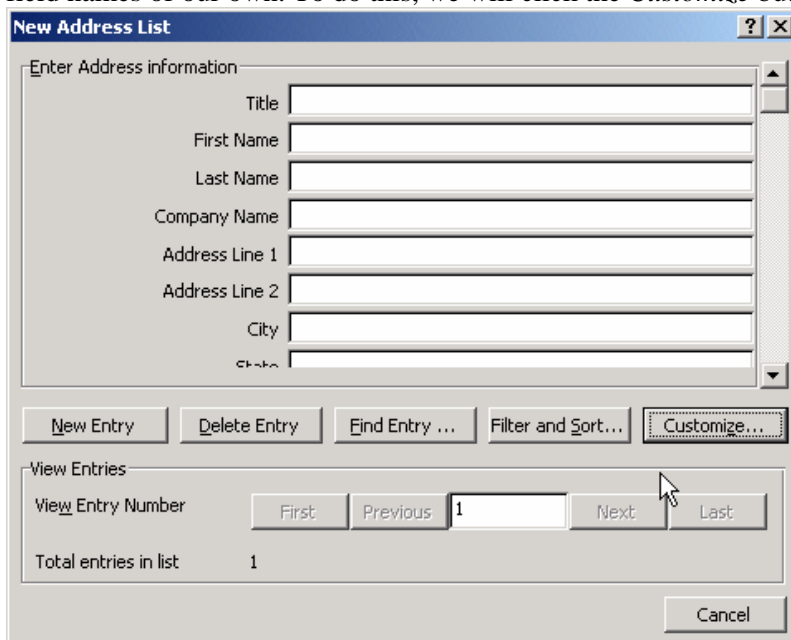
We don't have a list of recipients. We intend to create one, so select *Type a new list*.



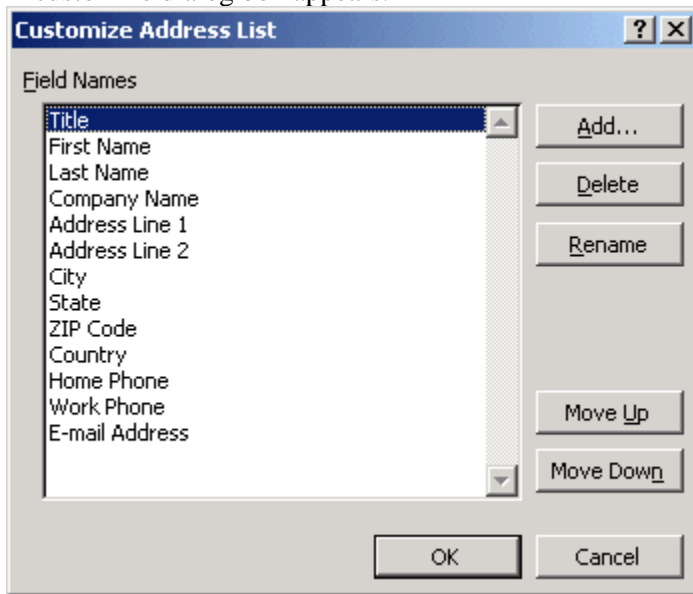
Then click the *Create* button.

Creating the Data for the Merge

18. A data entry box appears, pre-configured with certain fields. We want to keep some of these fields, but not others. Some we want to rename (state to province for example). We also want to add some field names of our own. To do this, we will click the *Customize* button.



19. A customize dialog box appears.



We want the first five fields, but we don't need *Address Line 2*. Select it, and click the *Delete* button. You will be asked if you really want to delete it, and click *Yes*.

20. We want the field called *State*, except we want it to have a name of *Province*. Select *State* and click the *Rename* button.



In the *Rename To* box type *Province*.

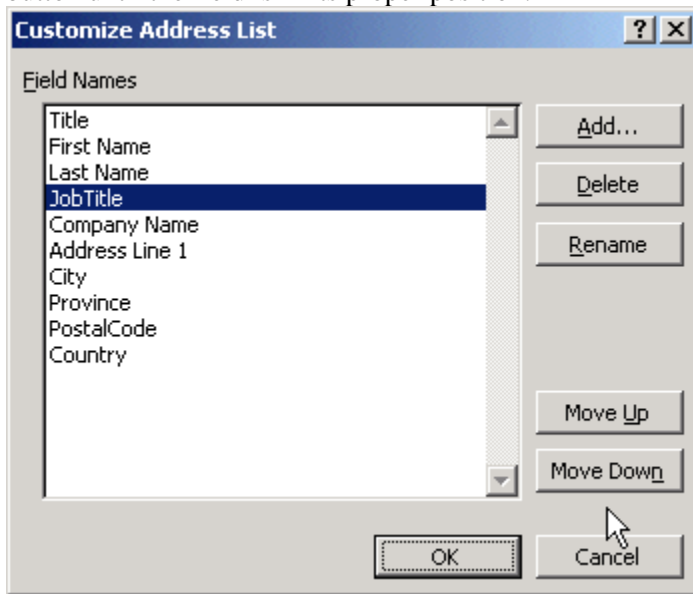
21. Similarly, rename the field *Zip Code* to *PostalCode*.
22. Now delete the fields *Home Phone*, *Work*. We aren't sure about *Country*. We don't have any data for this field, but we may need it later. We will leave the field, and leave it blank for the time being.
23. We need a new field, *JobTitle*. Click the *Add* button.



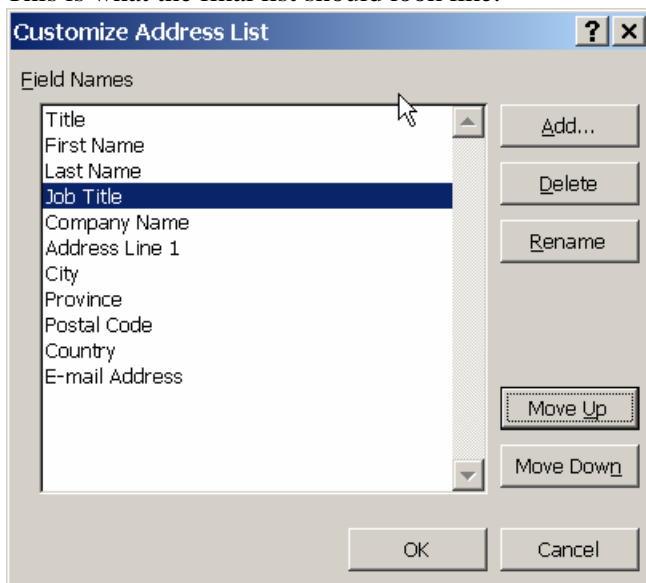
Type *JobTitle* for the field name, and click *OK*.

24. This field will be positioned relative to which field was selected, but we want it to appear between *Last Name* and *Company*. Select the *JobTitle* field and repeatedly click the *Move up* or *Move down*

button until the field is in its proper position.



This is what the final list should look like.



Click *OK*.

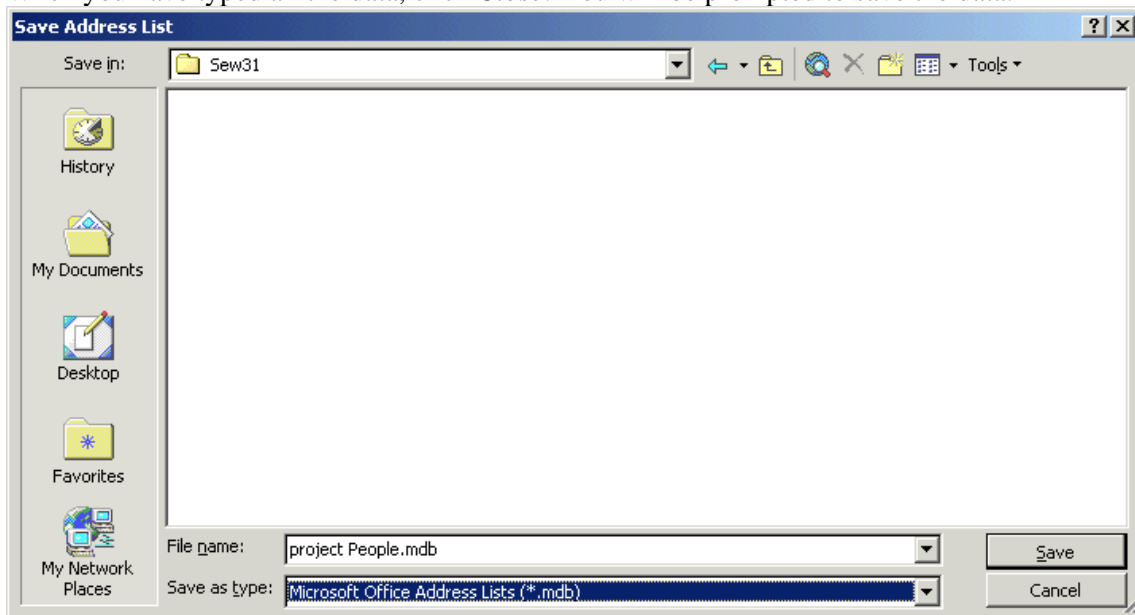
25. The data entry form re-appears.

Enter the information for the first record, pressing either *TAB* or *Enter* to move from field to field.

26. When you have finished the data for record 1, press *Enter* until the *Add New* button is highlighted. When it is highlighted, press *Enter* again. A new form will appear. Repeat the data entry process, creating these entries.

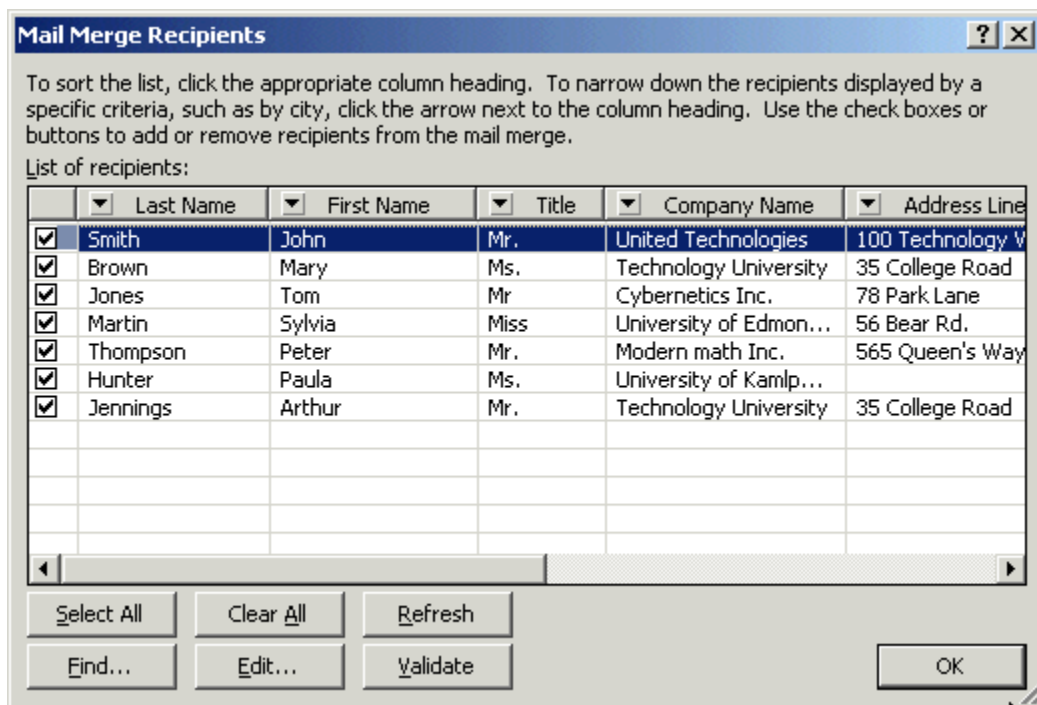
Title	First Name	Last Name	Job Title	Company	Address1	City	Province	Postal Code	email
Mr.	John	Smith	Manager	United Technologies	100 Technology Way	Waterloo	Ontario	N3D 6R5	ist01@watserv1.uwaterloo.ca
Ms.	Mary	Brown	Professor	Technology University	35 College Road	Stratford	Ontario	N6G 8Y6	ist02@watserv1.uwaterloo.ca
Mr.	Tom	Jones	Analyst	Cybernetics Inc.	78 Park Lane	Hamilton	Ontario	N3J 6T5	ist03@watserv1.uwaterloo.ca
Miss	Sylvia	Martin	Assistant Professor	University of Edmonton	56 Bear Road	Edmonton	Alberta	H7D 5D3	ist041@watserv1.uwaterloo.ca
Mr.	Peter	Thompson	President	Modern Math Inc.	565 Queen's Way	Halifax	Nova Scotia	J8Y 5D3	ist05@watserv1.uwaterloo.ca
Ms.	Paula	Hunter	Associate Professor	University of Kamloops		Kamloops	British Columbia	K8T 3D5	ist06@watserv1.uwaterloo.ca
Mr.	Arthur	Jennings	Lecturer	Technology University	35 College Road	Stratford	Ontario	N6G 8Y6	ist07@watserv1.uwaterloo.ca
Ms.	Gina	Tomlins	Research Associate	University of Manitoba	54 Green Street	Winnipeg	Manitoba	G5T 5R7	ist08@watserv1.uwaterloo.ca
Mr.	George	Fleming	Director	Research Technologies	632 Apian way	Guelph	Ontario	N5F 6D8	ist09@watserv1.uwaterloo.ca
Miss	Clara	Thompson	Professor	University of Saskatchewan	767 University Avenue	Saskatoon	Saskatchewan		ist10@watserv1.uwaterloo.ca

14. When you have typed all the data, click *Close*. You will be prompted to save the data.



You will save the data on the N drive. Give the data file a name of *Project People*. You will note that the *filetype* selected is *mdb* which is an *Access* file. Unfortunately we are offered no other choice. Click *Save*.

15. A window displaying all the records you entered will appear.



Click *OK*.

Creating the Main Document

16. We are now ready to create our letter.

Step 3 of 6

➔ [Next: Write your letter](#)

⬅ [Previous: Starting document](#)

Click on *Next: Write your letter* to proceed.

17. First, we will type the text of our letter. (To speed things up, the text of the letter is on your N drive in your folder called SEW31Pnn where Pnn is the number on top of your monitor. The file is called *Startuplet.doc*. You can place it in your empty document window by doing **Insert**➔**File** and selecting the *Startuplet.doc* file from your folder on the N drive.

18. Here is what our letter looks like, with no merge fields.

December 4, 2002


¶
¶
¶
Dear ¶
¶
Thank you for volunteering to serve on the Canadian Cybernetics Conference startup committee. Our job as a startup committee will involve choosing a location for the conference, and finding people to serve on the local arrangements committee, the program committee, and the speaker selection committee. ¶
I am sure I will enjoy working with all of you throughout the next year. ¶
¶
¶
Yours sincerely, ¶
¶
¶
¶
Peggy Day ¶
Conference Co-ordinator ¶ I ≡

19. We will now add merge fields. Click on the *More Items* line on the Task Pane.

Write your letter

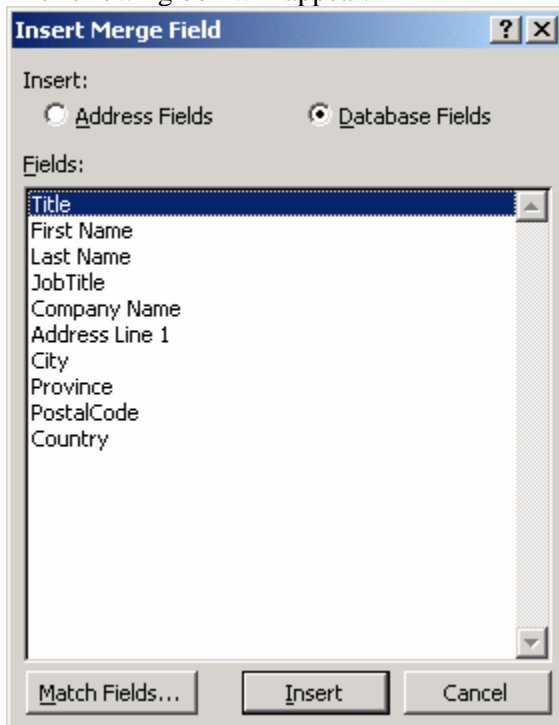
If you have not already done so, write your letter now.

To add recipient information to your letter, click a location in the document, and then click one of the items below.


-  Address block...
-  Greeting line...
-  Electronic postage...
-  More items...

When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.

20. The following box will appear.



You will see that all our merge fields are listed.

21. We want to insert the recipient's name and address at the top of the letter. This will be much easier to do if you have *paragraph marks* turned on. If you don't, turn them on by clicking the *Show/Hide Paragraphs* button  on the toolbar.
22. We want to insert the recipient's name so you want to click your mouse there to set the insertion point. You will find that you can't click in the document window when the *Insert Merge Field* window is open. Click *Cancel* to close the merge field box. Click your mouse beside the topmost

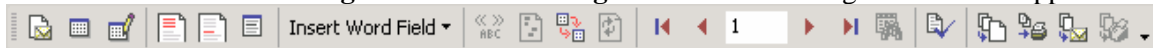
paragraph mark to set the insertion point. Now click on the *More Items* line on the Task Pane once again.

23. We want to enter the field for the recipient's title, so make sure the *Title* field is selected and click

Insert. A field code will appear in the document `«Title»!`

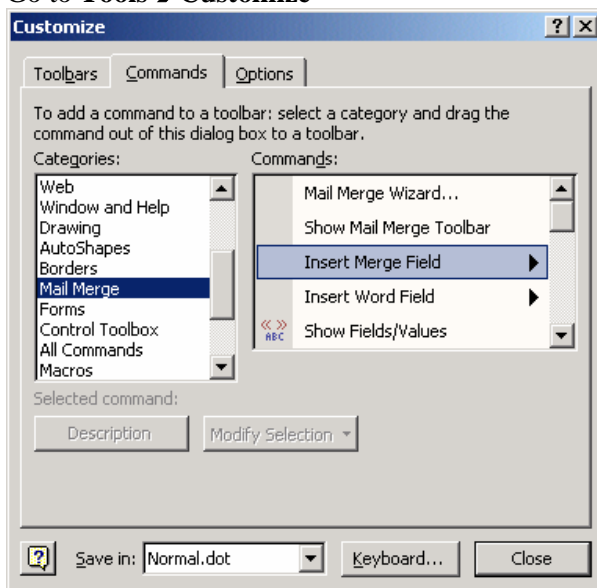
24. We want a space after the title, so click in the document to enter a space? What, you can't click in the document? Click *Cancel* to close the *Merge Field* window, and type a space into the document. Now click on the *More Items* line on the Task Pane once again. Select *First Name* and click *Insert*.

25. We want a space after *First Name*, so we must close the field window again. By now you are probably ready to tear out your hair, but there is an easier way. Close the *Insert Field* window. Go to **Tools→Letters and Mailings→Show Mail Merge Toolbar**. The merge toolbar will appear.



26. There is an important item that we want to add to this, the *Insert Merge Field* button.

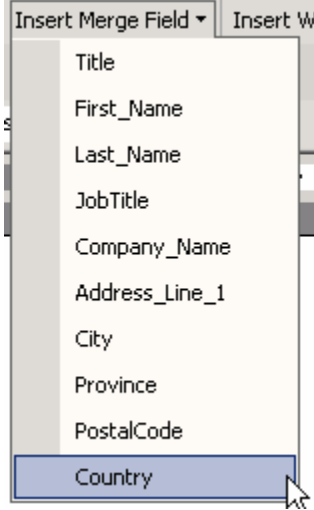
27. Go to **Tools→Customize**



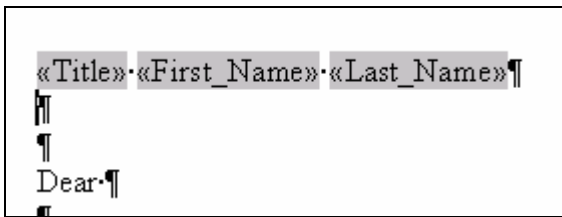
Select the *Commands* tab, and under *Categories* select *Mail Merge*. Under *Commands*: select *Insert Merge Field*.

28. With the mouse button held down, drag *Insert Merge Field* and drop it on the *Merge* toolbar, just to the left of *Insert Word Field*.

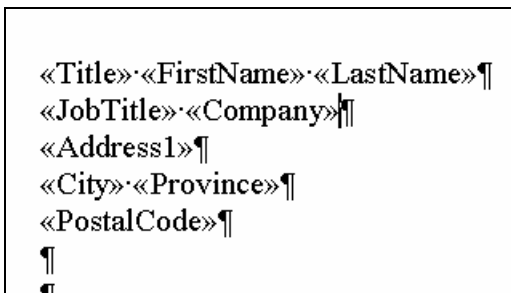
29. . Now click on the arrow beside the *Insert Mail Merge* button and you will see that it lists all our fields.



30. Press the spacebar, and Insert the field called `First_Name`, then a space, then the field called `LastName`. Press Return to move to a new line. The document should now look like this:



31. Now enter the other fields in a similar manner, so the document looks like this.



32. Now place the cursor after the word `Dear`, type a space, and insert the field `First_Name`. Follow this with a comma. Here is what the letter with all added merge fields looks like.

December 4, 200

«Title» «FirstName» «LastName»¶

«JobTitle» «Company»¶

«Address1»¶

«City» «Province»¶

«PostalCode»¶

¶

Dear «FirstName»,¶

Thank you for volunteering to serve on the Canadian Cybernetics Conference startup committee. Our job as a startup committee will involve choosing a location for the conference, and finding people to serve on the local arrangements committee, the program committee, and the speaker selection committee.¶

I am sure I will enjoy working with all of you throughout the next year.¶

¶

¶

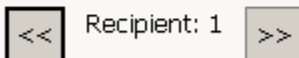
Yours sincerely,¶

Performing the Merge

33. Now click on *Preview Your Letters* at the bottom of the task pane.

Preview your letters

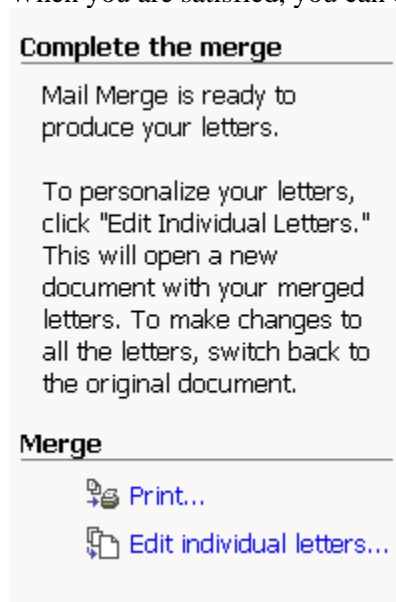
One of the merged letters is previewed here. To preview another letter, click one of the following:



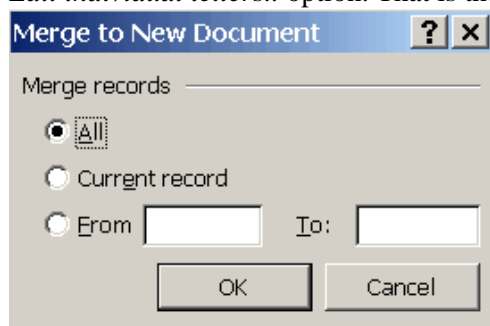
 [Find a recipient...](#)

The task pane will display a *Preview* box that will let you click through and look at individual letters.

When you are satisfied, you can click *Complete the Merge* at the bottom of the task pane.



34. You are offered the choice of merging directly to the printer, or to a new document, by choosing the *Edit individual letters..* option. That is the one we will select.

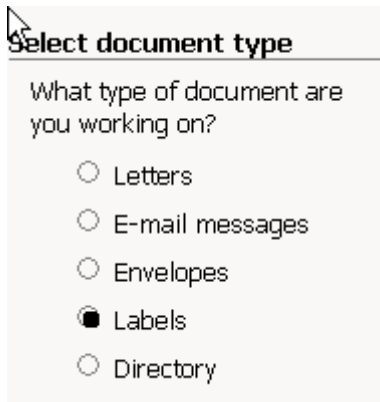


35. We will be offered the choice of merging All records, or only certain ones. If you are merging directly to the printer, you may opt to first merge just 5 or 10 records to ensure that everything is working as expected. We will choose All. Click *OK*.
36. Examine the letters. Note how each one starts on a new page. If we were satisfied, we could now print this document. However, we will not print at this time.
37. Normally you would return to your original merge document and save it, because it is possible that you might want to perform this same merge again. When you save the merge document, it remembers what data file was used in the merge.
38. Close all opened documents, and begin a new empty document.

Merging to Mailing Labels

We will be including a lot of material with our letters, and we will need to mail it in large envelopes. We will create mailing labels for our envelopes.

39. Make sure that you are in a new, empty document, and select **Tools**→**Letters and Mailings**→**Mail Merge Wizard**.
From the task pane, choose *Labels*

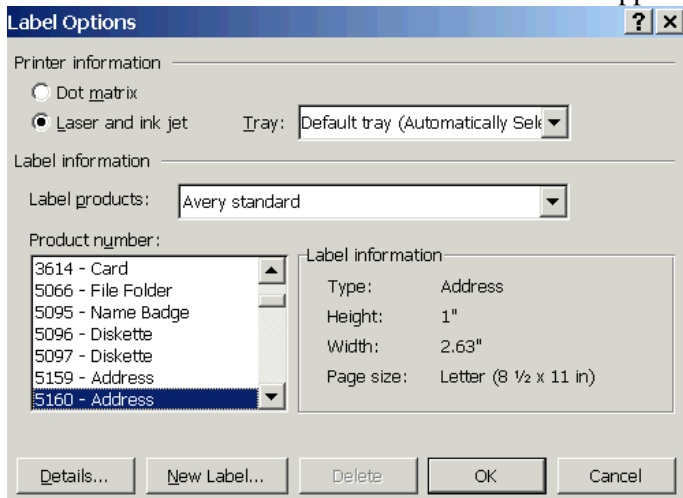


40. Click *Starting Document* and choose to *Change Document Layout*.



Then click Label options.

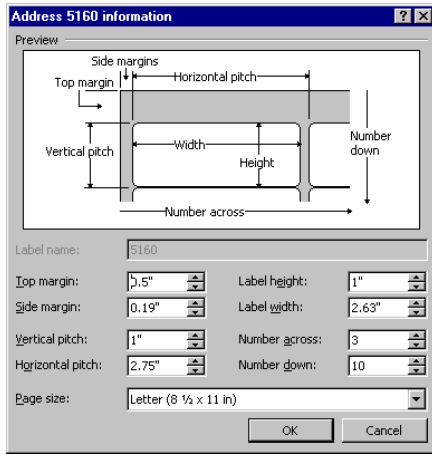
41. Here we get to choose our labels. We will probably be printing on a laser printer, so we will select that. Most likely we will be using an “Avery standard” label, so we will select that in the “Label products” box. We can then select our specific label from the “Product number” box. We will select *5160 – Address*. Notice the Label Information that appears beside the box.



Note that the “Tray” defaulted to “Default Tray”. We will need to select the tray in which we intend

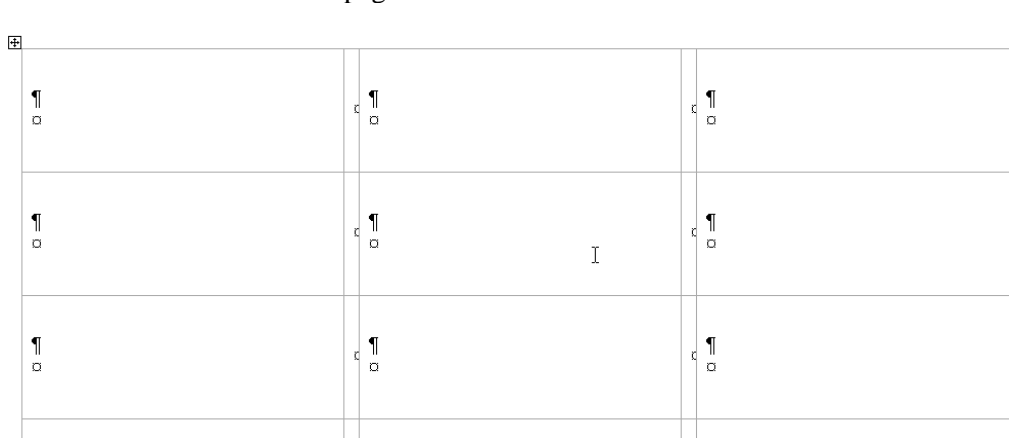
to place the labels.

If we want to know more, we can click the “Details” button.



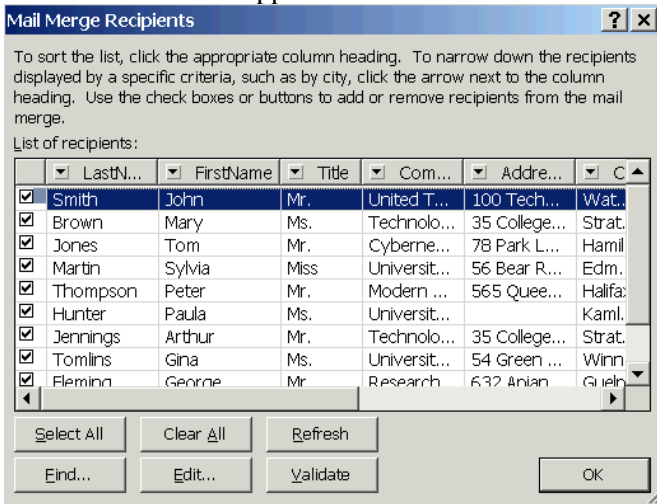
Click OK.

42. Our document will now be a page of blank labels.



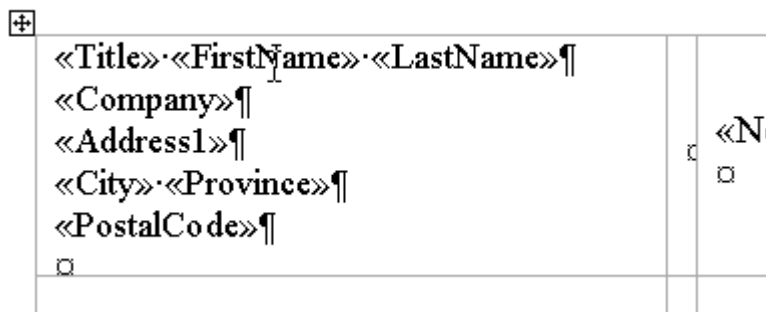
43. Click *Select Recipients*. We will select *Use an Existing List* and click *Browse* and navigate to our N drive and choose *ProjectPeople*.

44. A data window will appear.



Make sure that all recipients are selected.

45. Now click *Arrange your labels* and using the *Insert Merge Field* button on the Merge toolbar create a label that looks like this.



46. At this point you may need to adjust your formatting or font size to ensure that all fields will fit on the label. When you are satisfied with the label, click *Update all labels* under the heading **Replicate labels** on the task pane.

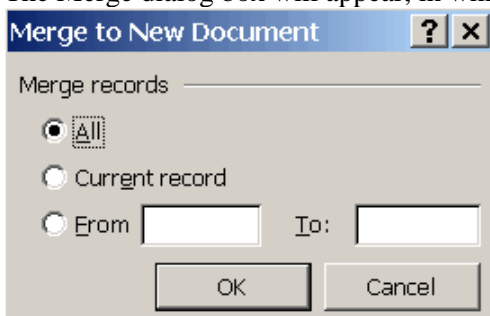


. Your document will now look like this.

«Title»·«FirstName»·«LastName»¶ «JobTitle»·«Company»¶ «Address1»¶ «City»¶ «PostalCode»¶	«Next-Record»«Title»·«FirstName»· «LastName»¶ «JobTitle»·«Company»¶ «Address1»¶ «City»¶	«Next-Record»«Title»·«FirstName»· «LastName»¶ «JobTitle»·«Company»¶ «Address1»¶ «City»¶
«Next-Record»«Title»·«FirstName»· «LastName»¶ «JobTitle»·«Company»¶ «Address1»¶ «City»¶	«Next-Record»«Title»·«FirstName»· «LastName»¶ «JobTitle»·«Company»¶ «Address1»¶ «City»¶	«Next-Record»«Title»·«FirstName»· «LastName»¶ «JobTitle»·«Company»¶ «Address1»¶ «City»¶
«Next-Record»«Title»·«FirstName»· «LastName»¶ «JobTitle»·«Company»¶ «Address1»¶ «City»¶	«Next-Record»«Title»·«FirstName»· «LastName»¶ «JobTitle»·«Company»¶ «Address1»¶ «City»¶	«Next-Record»«Title»·«FirstName»· «LastName»¶ «JobTitle»·«Company»¶ «Address1»¶ «City»¶
«Next-Record»«Title»·«FirstName»· «LastName»¶ «JobTitle»·«Company»¶ «Address1»¶ «City»¶	«Next-Record»«Title»·«FirstName»· «LastName»¶ «JobTitle»·«Company»¶ «Address1»¶ «City»¶	«Next-Record»«Title»·«FirstName»· «LastName»¶ «JobTitle»·«Company»¶ «Address1»¶ «City»¶
«Next-Record»«Title»·«FirstName»· «LastName»¶ «JobTitle»·«Company»¶ «Address1»¶ «City»¶	«Next-Record»«Title»·«FirstName»· «LastName»¶ «JobTitle»·«Company»¶ «Address1»¶ «City»¶	«Next-Record»«Title»·«FirstName»· «LastName»¶ «JobTitle»·«Company»¶ «Address1»¶ «City»¶

Don't be concerned that the postal code field is not showing on most labels. As long as it appears on the first label, that's all that matters.

47. Now click *Next, Preview your labels* at the bottom of the task pane. You can browse through your labels. Then click *Complete the Merge* at the bottom of the task pane. We will choose to *Edit individual labels*.
48. The Merge dialog box will appear, in which we will choose to merge All records.



Click Ok.

49. Your labels will appear in a new document. You can now print the labels, but you may find it advisable to print one or two pages on regular paper first, before printing on labels. This will give you the opportunity to verify that everything is printing as expected, without using up expensive label sheets.

You may note that our labels didn't fill up even one page. But if there are more recipients than will fit on a single label page, additional pages will be generated automatically.

Mail Merge Using an Excel File as the Data File

We need to send a memo to a different group of people. These are a number of people on-campus who have volunteered to help us with this conference. Joe is co-ordinating this activity, and he is using an

Excel spreadsheet to keep track of information about these people. We will use this Excel spreadsheet as our data file in a mail merge.

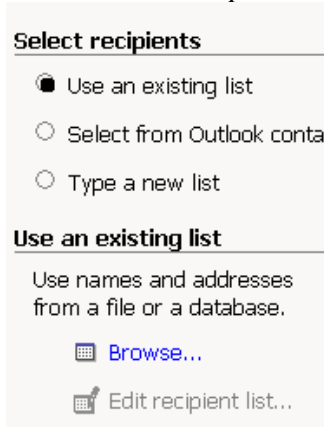
Start the Excel Data Merge

50. Close all opened Word documents and start a new document. Begin a Mail Merge by **Tools**→**Letters and Mailings**→**Mail Merge Wizard**
51. Choose Letters.. Click *Starting Document*.



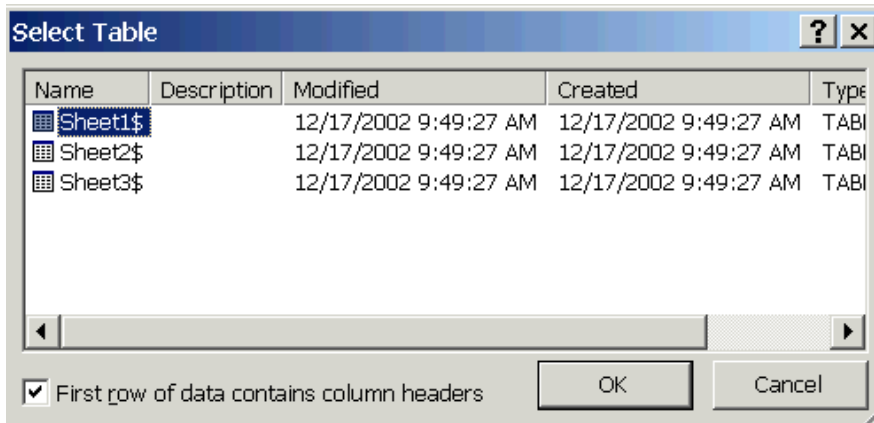
Choose to *Use the current document*

52. Choose *Select Recipients*.



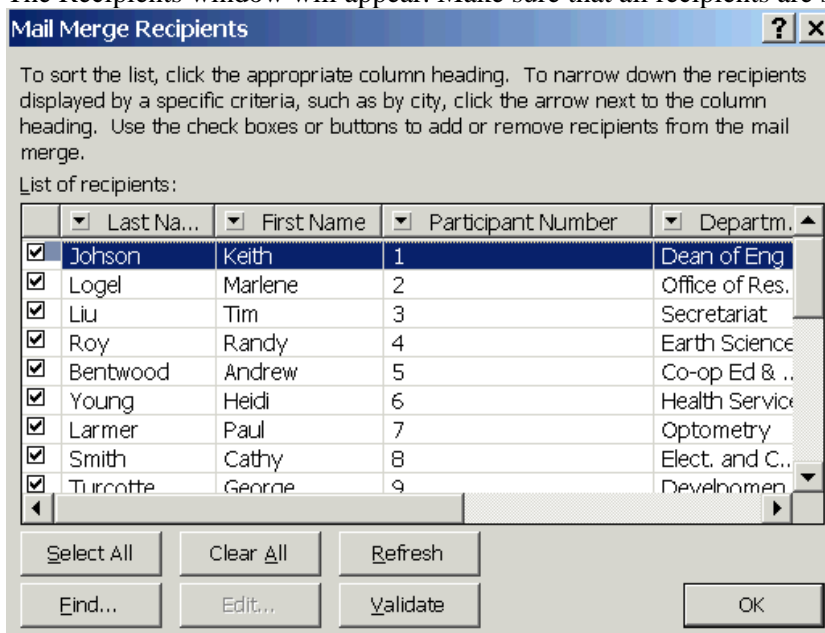
Use an existing list and click *Browse* to find the list.

53. Our data source is an Excel file, so in the “Files of Type” box, select “MS Excel Worksheets (*.xls)”. The spreadsheet is on the N drive, so from the “Look in:” box, pick the N drive, and then select the file called *campus.xls*, and then click the “Open” button.
54. A *Select Table* box will appear. Make sure that *Sheet1* is selected, and that *First row contains headers* is checked.



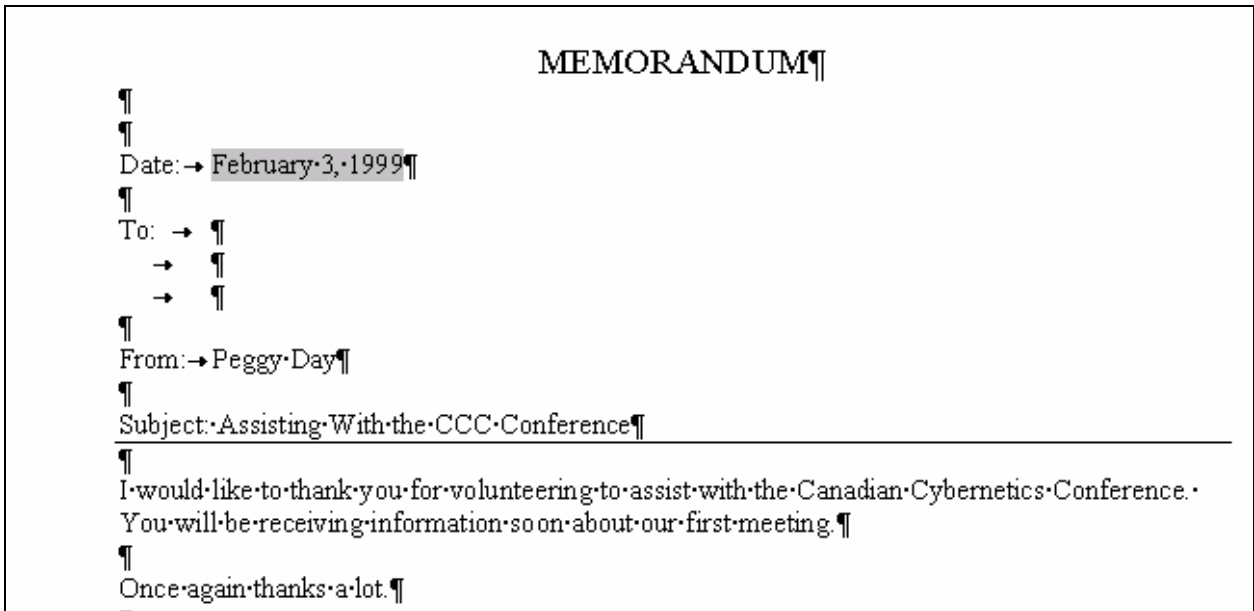
Click OK.


55. The Recipients window will appear. Make sure that all recipients are selected.

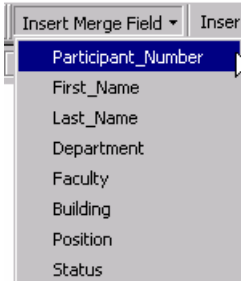


Click OK.

56. Next click *Write your letter* from the bottom of the task pane.
57. We now have an empty Word document. The text for the memo has been prepared, and is on your N drive in a file called *memo1text.doc*. Do an **Insert**→**File** and select your N drive, and pick *memo1text.doc* to insert the text. Your document should now look like this.



58. We are now ready to insert our Merge Fields into the file. (Hint: it will be much easier to get positioned in the right place if you turn on paragraph marks by clicking the  toolbar).
59. Now insert merge fields from the “Insert Merge Fields” drop down box.



Insert the fields so that the letter now looks like this.

MEMORANDUM¶

¶

¶

Date: → February 3, 1999¶

¶

To: → «First_Name»«Last_Name»¶
 → «Department»¶
 → «Building»¶

¶

From: → Kim·Gingerich¶

¶

Subject: Assisting With the CCC Conference¶

¶

«First_Name», I would like to thank you for volunteering to assist with the Canadian Cybernetics Conference. You will be receiving information soon about our first meeting. ¶

¶

Once again thanks a lot. ¶

¶

60. Now merge to a new document by clicking *Preview your letters* and *Complete the merge* at the bottom of the task pane.

Selecting Records for a Mail Merge

Selecting Records Where a Field Matches a Specific Value

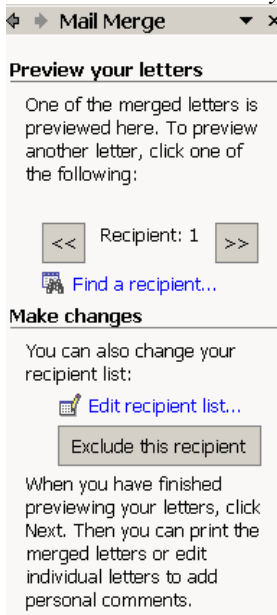
When we look at the new document containing the results of our merge, we realize that what we did isn't quite what we intended to do. We actually wanted a slightly different memo sent to people in administrative departments than that sent to people in academic departments. We will do that now.

61. First close the document into which the memos were merged. We don't want to get confused about which will contain the final results that we want to print.
62. Click *Previous* at the bottom of the task pane until you are editing the document containing the memo to be merged. Add a sentence to the end of the first paragraph so it looks like this.

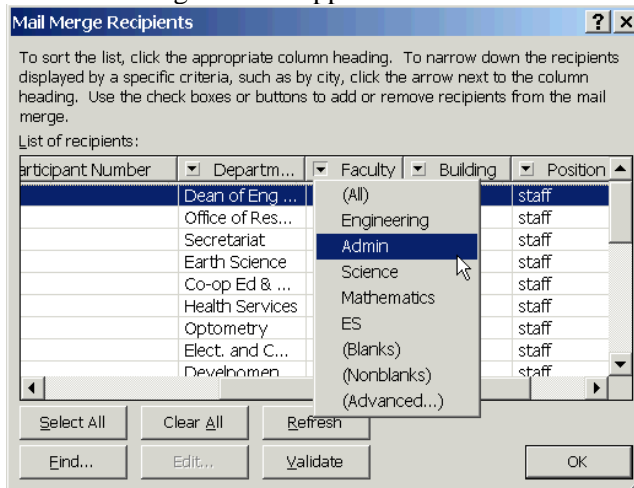
«First_Name», I would like to thank you for volunteering to assist with the Canadian Cybernetics Conference. You will be receiving information soon about our first meeting. I assure you will represent the University administration well. ¶

63. We now want to merge this memo with our data but we will want to select only those people whose Faculty is listed as "Admin".

64. Return to the *Preview your letters* panel and click the *Edit recipient list*.



65. The Edit dialog box will appear.



66. Click on the arrow beside the *Faculty* header, and from the drop down list, select *Admin*. Note that only Admin users are displayed. Click OK, and then click *Complete the merge* and *Edit individual letters*. You will see that only those going to Admin are created.

67. Close the merged document.

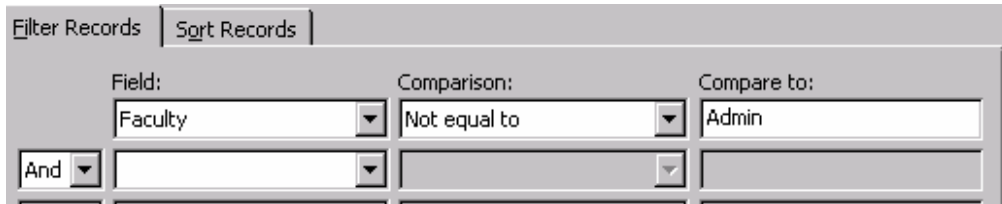
Selecting Records Where a Field Does Not Match a Specific Value

Now we would like to change our memorandum slightly, and run the merge again, this time selecting everybody who is **not** in an Admin department.

68. At the bottom of the task pane, click *Previous* until you have returned to the *Write your letter* panel. Modify the letter to look like this.

«First Name», I would like to thank you for volunteering to assist with the Canadian Cybernetics Conference. You will be receiving information soon about our first meeting. I am sure you will represent your faculty well. ¶

69. Now click *Write your letter* and choose *Edit recipient list*. It is not as simple this time to make our selection, because we want people from Engineering and Science etc. So we will click the arrow beside the *Faculty* header, and this time choose *Advanced*. A Filter box that allows us to make more complex selections will appear. We will ask for all records where Faculty **IS NOT EQUAL TO** Admin. In the Query Options dialog box, make the following settings.



Field:	Comparison:	Compare to:
Faculty	Not equal to	Admin
And		

70. Click OK and then *Complete the merge*. Check the resulting merged results, and you will see that we only have people who are not in Admin.

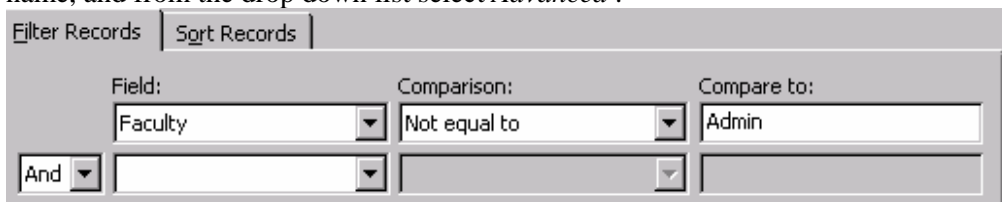
71. Close the document containing the merged memos.

NOTE: We could have achieved the above two merged memos in a single step using an “If...Then...Else” condition. We will learn about this feature later in the course.

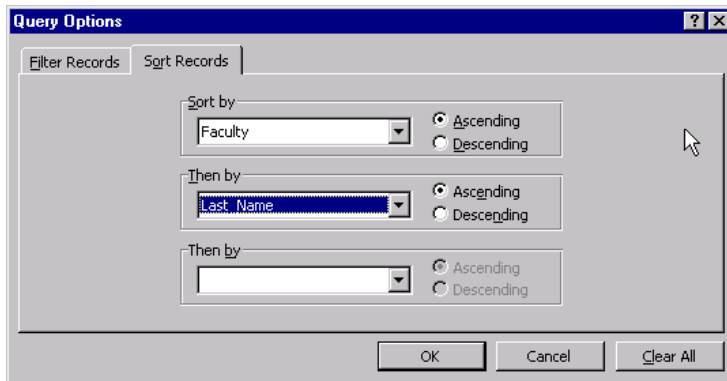
Sorting Records Before Merging

We realize that we didn't quite get what we needed. To make it easier to mail out these memos, we would like to have them sorted alphabetically by Faculty, and then within faculty, we would like to sort them alphabetically by last name. For example, all memos addressed to people in Engineering should print before memos for anyone in Science. And within Engineering, the memo for Paul Payne should print before the one for Cathy Smith, which in turn should print before the one for Ernie Stewart.

72. Return to the *Preview your letters* panel and select *Edit recipient list*. The dialog box appears. Try clicking on the *Last Name* header. Note that it sorts by last name. Now try clicking on the *Faculty* header. It now sorts by Faculty. However, this box does not provide us with the ability to sort by name within faculty. To do that we need the advanced settings. Click on the arrow beside any field name, and from the drop down list select *Advanced*.



Field:	Comparison:	Compare to:
Faculty	Not equal to	Admin
And		



73.

Click the “Sort Records” tab.

In the “Sort by” box, select Faculty. In the “Then by” box, select Last Name. Have them both sorted in Ascending order (A to Z). Note that we could have asked for one more sort. For example we could have sorted by Faculty, then within Faculty by Department, then within Department by Last Name. But what if we wanted 4 sort conditions? Say, Faculty by Department by Last Name by First Name? There are several ways to achieve this. One is to run multiple merges, selecting faculty by faculty. For example filter only records where “Faculty Equals Arts” and sort by Department by Last Name by First Name. Then Select “Faculty Equals Engineering” and do the same sort, and so on.

If you have access to the data, there might be a simpler way. Go to Excel (in this case) and ask Excel to sort by Last Name and by First Name. Then, within the merge, you could ask to sort by Faculty by Department, knowing that the data within a department will already be sorted by name.

74. Click OK and then perform the Merge. Check your results, and then close the merged document.

Merging With a Delimited Text File as the Data File

Sometimes, you will need to use data stored in some application unknown to Word as your merge data file. One thing that almost every software package is capable of doing is outputting its data into a delimited text file. A delimited file is one where fields are separated from each other (delimited) by some character, such as a comma or a semicolon. The first record of the text file must contain the field names and be separated with the same delimiter character as the list items, for example a comma. If a data item is missing, that is indicated by two commas in a row.

Although you can use a text file for the merge, it might be easier to bring the text file into Excel, and merge from Excel. This makes it easier to spot if any data items are missing.

Merging to a Catalogue (or Department List, Phone List, etc.)

So far, we have used Merge to create form letters (although some of those were memoranda) and mailing labels. There is also an option to create envelopes, but that is really no different than creating letters. All these documents have one thing in common. Each record from the merge data database begins a new letter, or new label, or new envelope.

There is another type of merge we can carry out. Word calls it a directory merge. It is the type of merge we would use to create a departmental directory or a telephone list. The difference between the above type of merges and this one is that this type of merge doesn’t begin a new document for each record in the database. The merged information appears continuously in the merged document.

We are going to carry out this type of merge to create a list of registrants for the Canadian Cybernetics Conference.

Merging From an Access Database

The person who is preparing the conference program and accepting registrations is using an Access database to store the information. We might not know anything about Access, but that won't prevent us from using the data.

Creating a List of Registrants

We would like to create a list of all the people who have registered to date, sorted by their last name. This type of merge is a "Directory" merge. We will set up the merge document with the basic information we want for each registrant. Since all the information we put into the merge document will be repeated for each record in the database, we will add things like titles after we merge to a new document.

Using an "If Then Else" Condition

One of the fields we want to display in our list of registrants is the one that indicates whether or not people have paid their registration fees. However, this field is coded in the database as a Logical field, a "-True" indicating the fees have been paid, a "False" indicating that they have not. We would like our list to display the words "Paid" or "Not Paid" instead of "True" or "False". We will do this by means of inserting a Word "If...Then...Else" field into our document.

NOTE: We are using this technique to insert a word into a list, but we could just as easily use it to insert paragraphs into a form letter, thereby building a customized form letter. For example, suppose we were sending welcoming letters to all people who had registered for the conference. For all people whose city was not listed as "Waterloo", we could add a paragraph outlining some of the highlights of the city, or providing directions about how to get to Waterloo. This paragraph would not appear in the letters being sent to Waterloo residents. (Or an alternative paragraph could be added).

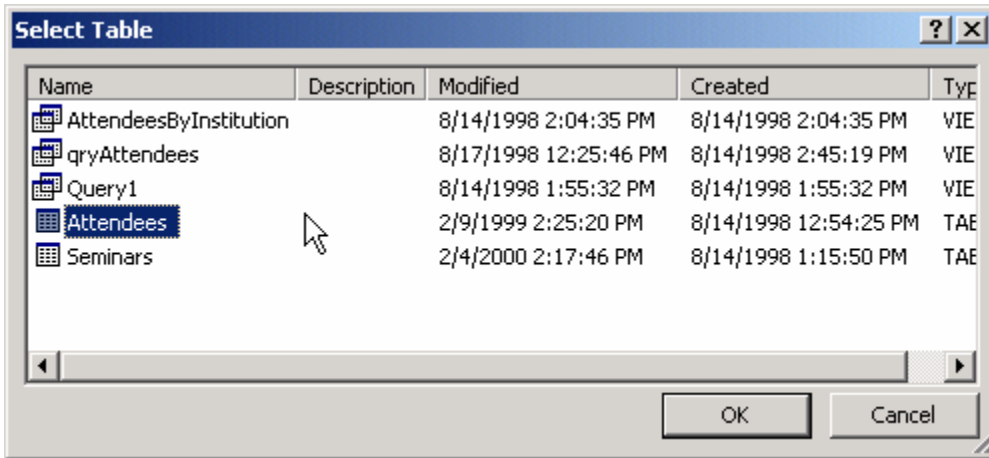
Let's get started.

75. Do a **Tools** → **Letters and Mailings** → **Mail Merge Wizard...** and choose *Directory* as your document type.



76. Click *Choose Recipients* and select *registrants.mdb* from your N drive.

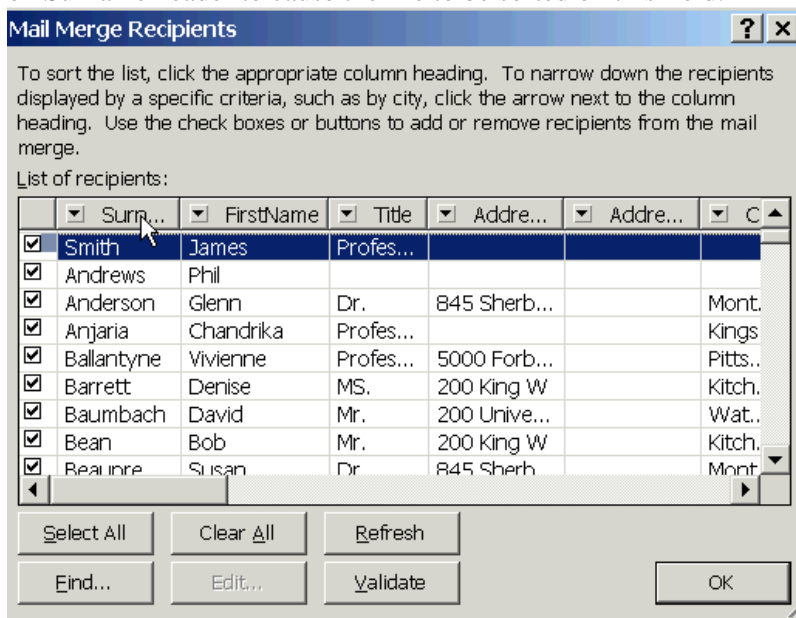
77. Select this file and click “Open”
78. A Microsoft Access dialog box will appear.



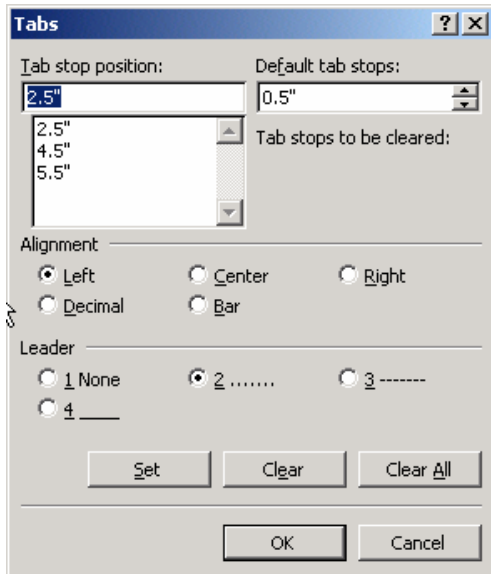
From the list of Tables and Queries , select “Attendees” table and click OK.

79. We would like to produce a list that contains:

Surname, First NameInstitution.... ”Paid” or “Not Paid”....Date Registered and we would like it sorted alphabetically by Surname. When the Recipients dialog box appears, click on Surname header to cause the file to be sorted on this field.

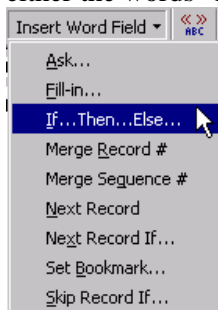


80. Trial and error will show that to make these columns fit on our page we will need to re-adjust our margins to 1 inch both left and right. We also need to set a font size no bigger than 11.
81. In order to have things lined up in columns and separated by dots, we will set tabs with “dot leaders”. Using a table is another way to get columns lined up, but that wouldn’t enable us to have the dots.
82. Do a **Format**→**Tabs** and in the dialog box that appears, type a tab setting at 2.5 inches, make it a left aligning tab, and select option 2 for the leader.



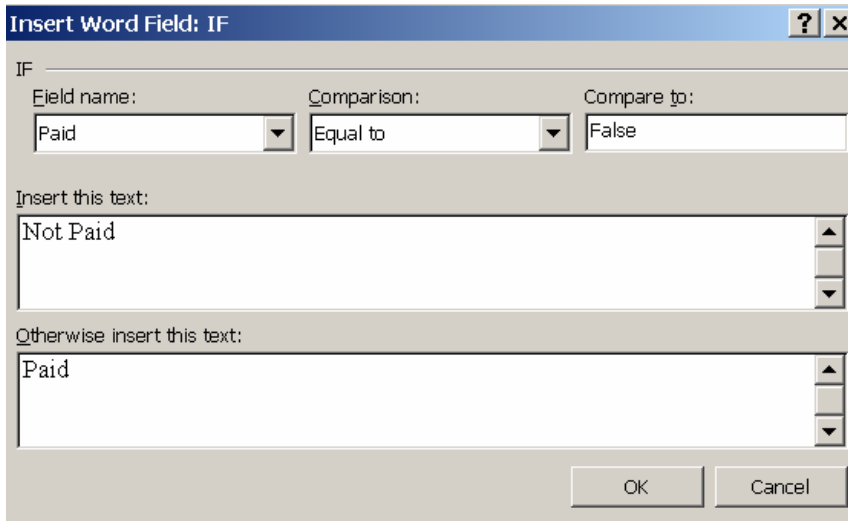
Then click Set. Repeat this process to set tabs at 4.5 and 5.5 inches.

83. Now insert Merge fields, for Surname and FirstName, separating them by a comma. Press the TAB key, and insert the “Institution” field. Press TAB again, and you are at the location where you want either the words “Paid” or “Not Paid” inserted, click the “Insert Word Field” button.



and choose “If ..Then..Else” from the drop down box.

84. In the If box that appears,



select “Paid” for the “Field Name” select “Equal to” for “Comparison”, and enter a “0” in the “Compare to” box. In the “Insert this text” box type “ Not Paid” and in the “Otherwise insert this text” box type “Paid”. What will happen here is that whenever the value of the field called “Paid” is “-1”, we will insert the word “Paid”. If the value of the field called “Paid” is 0, we will insert the words “Not Paid”. We won’t actually insert the field called “Paid” at all.

85. Press TAB again and add the field called “Date Registered”.
86. Press the Enter key to end the line. You need to do this, because otherwise the next record would just continue on from where the first left off.
87. The merge document should look like this: (actually it may wrap around because the field names are too long, but don’t worry about that.)

```
«Surname», «FirstName» .....→.....«Institution».....→.....Not Paid .....→.....«DateRegistered»¶
¶
```

88. Now select *Preview your directory* at the bottom of the task pane. A single record will be displayed.

```
Anderson, Glenn .....→.....McGill University .....→.....Paid .....→.....8/14/1998¶
¶
```

What does it look like? Does it fit on a single line? If not, go back

89. Next, click *Complete the Merge* at the bottom of the task pane, and select *To new document*. You will see your completed directory in a new document.

Anderson, Glenn	McGill University	→	Paid	→	8/14/1998
Andrews, Phil		→	Not Paid	→	8/14/1998
Anjaria, Chandrika	Queen's University	→	Not Paid	→	8/14/1998
Ballantyne, Vivienne	Carnegie Mellon	→	Not Paid	→	8/14/1998
Barrett, Denise	Waterloo Manufacturing	→	Paid	→	8/14/1998
Baumbach, David	University of Waterloo	→	Not Paid	→	8/14/1998
Beaupre, Susan	McGill University	→	Not Paid	→	8/14/1998
Bedi, Sunjay	Queen's University	→	Paid	→	8/14/1998
Bender, Bruce	Conestoga College	→	Not Paid	→	8/14/1998
Bilton, Christine (T)	Carnegie Mellon	→	Not Paid	→	8/14/1998
Blackburn, Bob	University of Waterloo	→	Not Paid	→	8/14/1998
Borkowski, Mike	University of Toronto	→	Not Paid	→	8/14/1998
Breen, Steve	McGill University	→	Not Paid	→	8/14/1998
Brown, Kerry	Conestoga College	→	Not Paid	→	8/14/1998
Cai, Allen	Carnegie Mellon	→	Paid	→	8/14/1998
Cairney, Gary	Queen's University	→	Not Paid	→	8/14/1998
Cameron, Brian	University of Waterloo	→	Not Paid	→	8/14/1998
Campbell, Colin	McGill University	→	Not Paid	→	8/14/1998
Canzi, David	University of Toronto	→	Paid	→	8/14/1998
Carr, Steve	Conestoga College	→	Paid	→	8/14/1998

90. We would like to put column headings above each column. Click beside the A of Anderson to open up a new line, and type Name <TAB> Institution <TAB> Paid <TAB> Date <TAB>.

91. Then select the line and make it bold.

92. Now open up a line above the column headings and type "Pre-registrations". Centre it, make it bold and 16 points. Your merged document should now look like this:

Current Pre-Registration			
Name	Institution	Paid	Date
Anderson, Glenn	McGill University	Paid	8/14/98
Andrews, Phil		Not Paid	8/14/98
Anjaria, Chandrika	Queen's University	Not Paid	8/14/98
Ballantyne, Vivienne	Carnegie Mellon	Not Paid	8/14/98
Barrett, Denise	Waterloo Manufacturing	Paid	8/14/98
Baumbach, David	University of Waterloo	Not Paid	8/14/98
Bean, Bob	Waterloo Manufacturing	Paid	8/14/98
Beaupre, Susan	McGill University	Not Paid	8/14/98
Bedi, Sunjay	Queen's University	Paid	8/14/98
Bender, Bruce	Conestoga College	Not Paid	8/14/98

You can add any other text you wish such as page numbers, and then save it and/or print it.

Note: If we had put the title and the column headings into our Main Document, they would have been repeated for every merged record, and this is certainly not what we want.

Merging to Electronic Mail

Sometimes, rather than merging to printed letters, you would like to do a mail merge to electronic mail, sending each recipient an email message. This can be a very useful tool, particularly if you want to send customized information to each recipient. However sending large numbers of email messages can cause a

strain on some mail servers. Before undertaking a large mail merge to email, contact the administrator of your system for advice on the best way of doing this. If you are sending more than a hundred or so messages, you probably should not send them all at once, but send 1-100, then 101-200, etc.

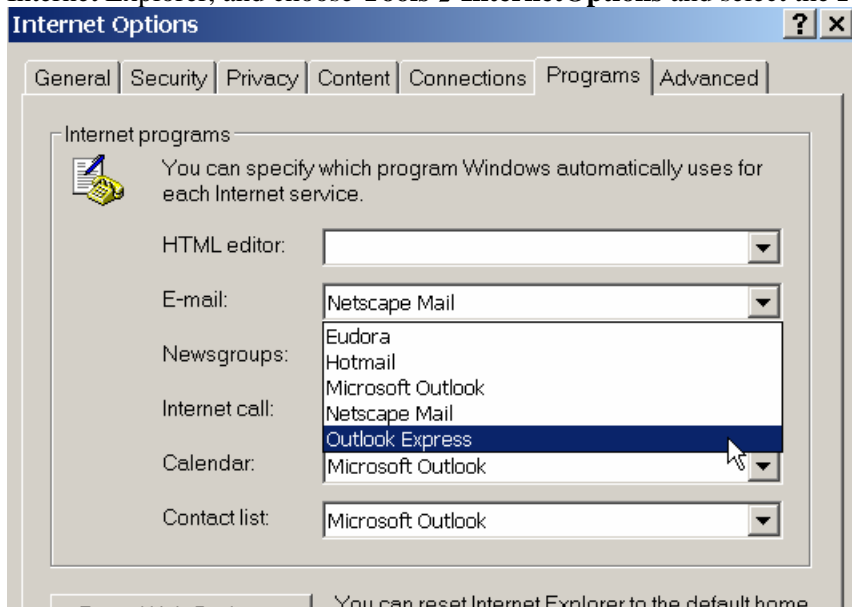
Merging to electronic mail requires two things:

- a. One of the merge fields in your data contains the recipient's email address.
- b. Your default mailer is MAPI (Messaging Application Program Interface) compliant. MAPI compliant mailers include Outlook, Outlook Express and Eudora 4.x or later. In theory Netscape Messenger is MAPI compliant, but I have never been able to make it work with a mail merge. Because of security issues involving Outlook, Microsoft has made it virtually impossible to use Outlook in a merge to email. Without a third party add-on program, Outlook requires that you click OK for every email the merge is trying to send. This makes Outlook essentially unusable. That means we are left with either Eudora or Outlook Express.

For the purpose of this course, we will use Outlook Express. Even if you are usually an Outlook or Netscape Messenger user, you will want to configure Outlook Express for mail merge purposes.

Setting a Default Mailer

93. When you carry out a mail merge to e-mail, Word will attempt to use the mailer that is set on your system as the default mailer. You may find that what your system thinks is the default mailer is not the mailer you regularly use. You can set a system default mailer via Internet Explorer's options. Start Internet Explorer, and choose **Tools**→**Internet Options** and select the **Programs** tab.



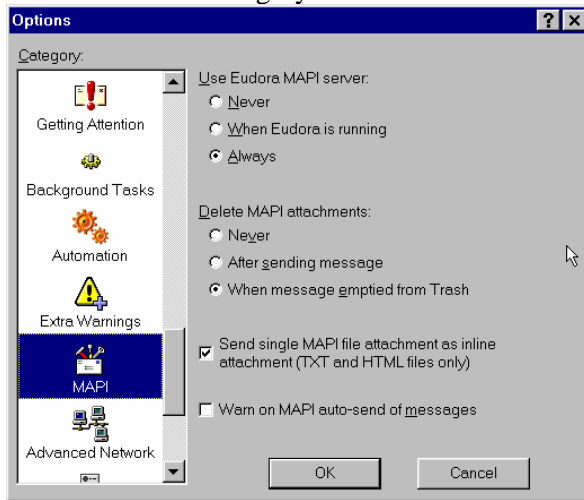
94. You should then be able to select the desired default mailer from the E-mail drop-down menu. Click OK.

Setting Eudora MAPI Options

Although we are going to use Outlook Express in this course, if you plan to use Eudora to do mail merges, you need to insure that it is configured for MAPI. To have Eudora function as your MAPI mailer, you will need to set the appropriate MAPI options.

95. In Eudora, do a **Tools**→**Options**.

96. Select the MAPI category.



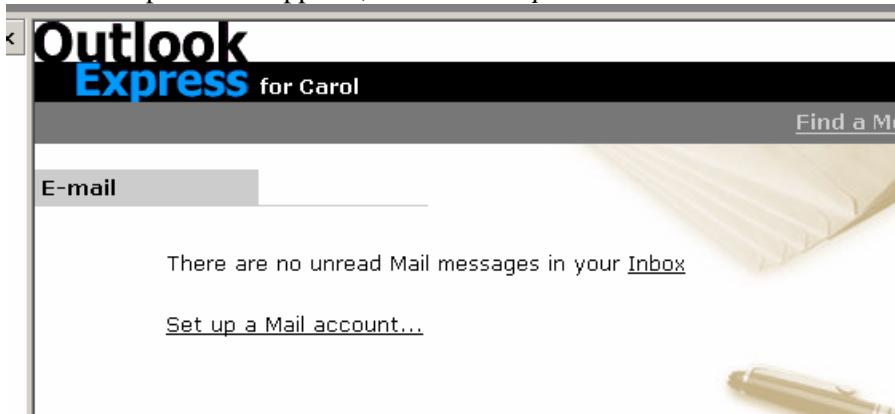
Under “Use Eudora MAPI server: click Always. This way, even if Eudora isn’t running, it will start up when you do an e-mail mail merge. Do not select the last option, “Warn on MAPI suto-send”. It will tend to generate a lot of messages.

97. Click OK.

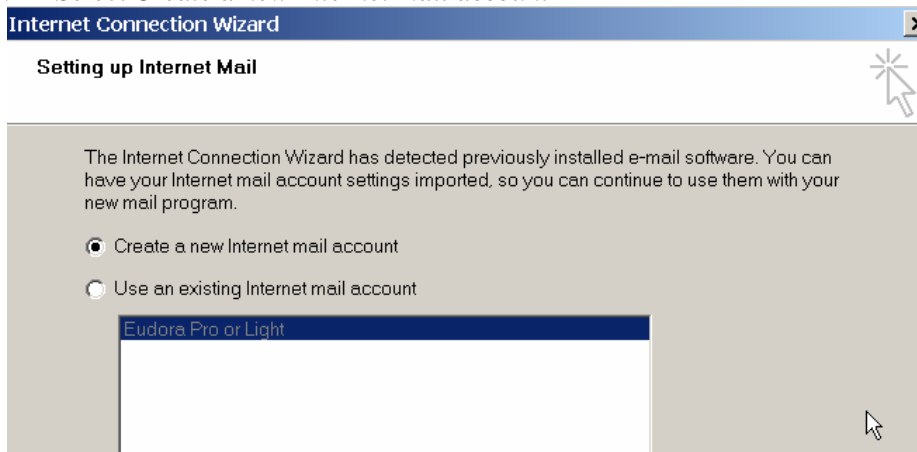
Configuring Outlook Express

98. Start Outlook Express

99. In the startup box that appears, click on *Set up a Mail Account*

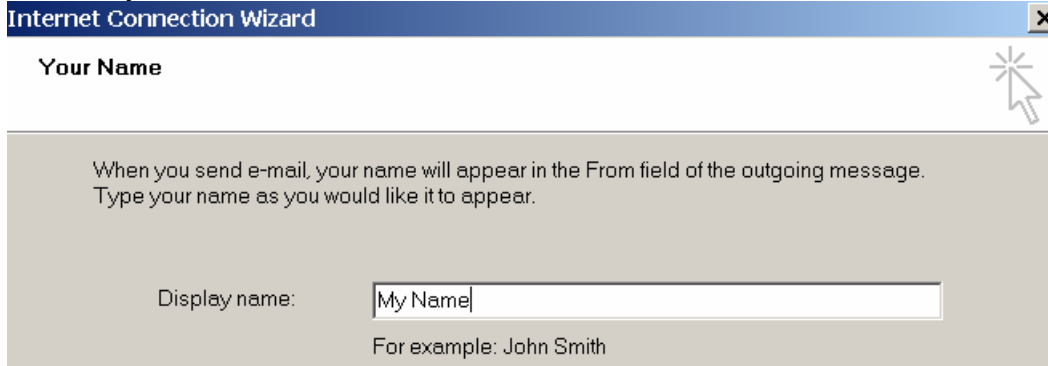


100. Select *Create a new Internet mail account*



Click *Next*.

101. Enter your name.



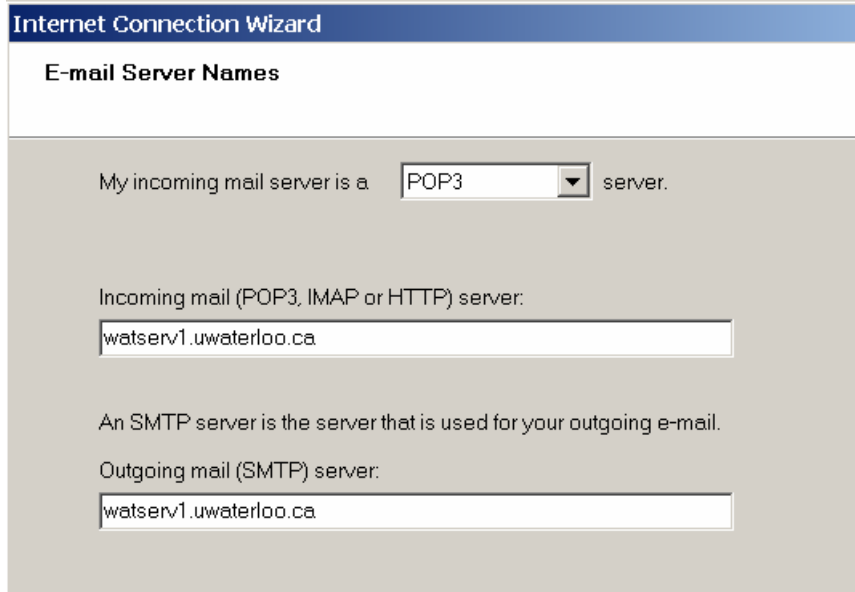
Click *Next*.

102. Enter your email address. For this course, you will be given an email address of the form *istnn@watserv1.uwaterloo.ca*.



Click *Next*.

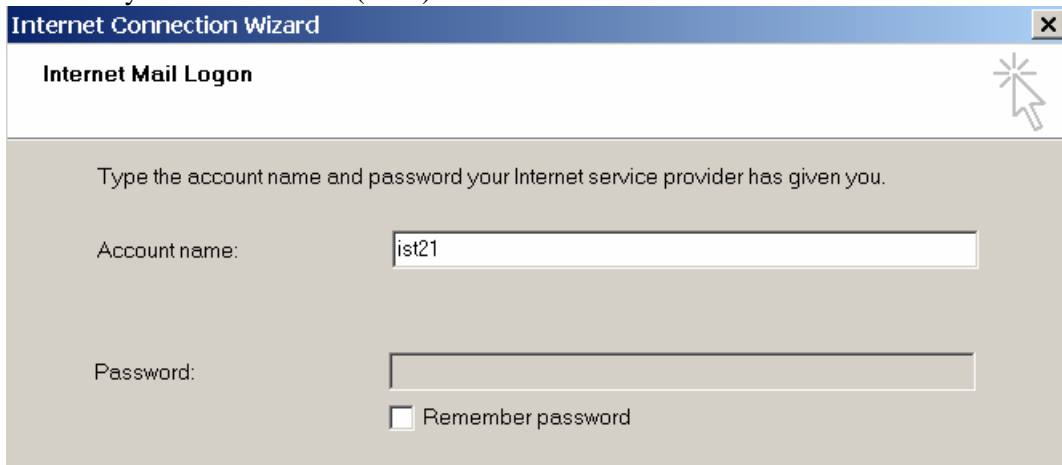
103. Enter *watserv1.uwaterloo.ca* as both your incoming and outgoing server.



The screenshot shows the 'Internet Connection Wizard' dialog box with the 'E-mail Server Names' tab selected. The text reads: 'My incoming mail server is a POP3 server.' Below this, there are two text input fields. The first is labeled 'Incoming mail (POP3, IMAP or HTTP) server:' and contains the text 'watserv1.uwaterloo.ca'. The second is labeled 'Outgoing mail (SMTP) server:' and also contains 'watserv1.uwaterloo.ca'.

Click *Next*.

104. Enter your account name (istnn).

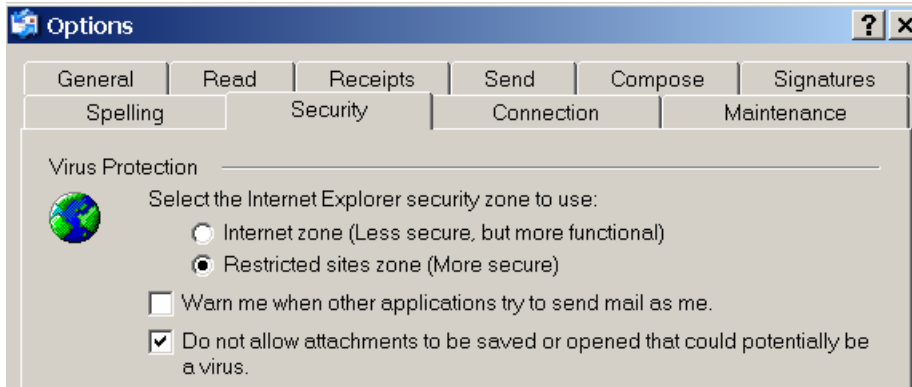


The screenshot shows the 'Internet Connection Wizard' dialog box with the 'Internet Mail Logon' tab selected. The text reads: 'Type the account name and password your Internet service provider has given you.' Below this, there are two text input fields. The first is labeled 'Account name:' and contains the text 'ist21'. The second is labeled 'Password:' and is empty. Below the password field is a checkbox labeled 'Remember password' which is unchecked.

Click *Next*.

105. Click *Finish*.

106. There is one very important setting we must make. Go to **Tools**→**Options**. Select the *Security* tab, and make sure that the box labeled *Warn me when other applications try to send mail as me* is **NOT** checked.



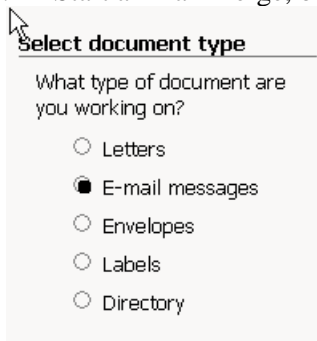
NOTE: You should turn this warning back on after completing your mail merge.
Click *OK*.

107. Outlook Express is configured; you can minimize it.

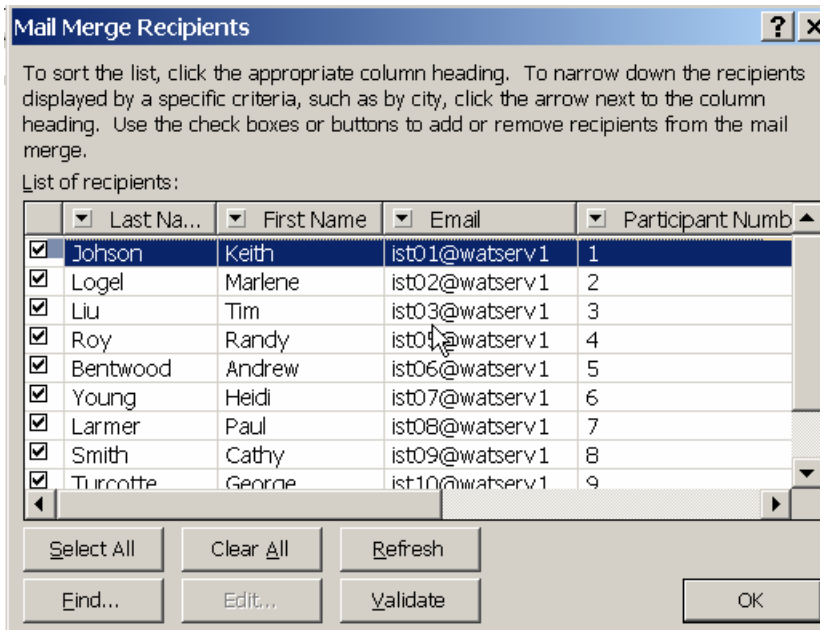
Merging to Email

In your merge data, one of the fields must contain the recipient's e-mail address.

108. Start an mail merge, but this time select *E-mail messages*.

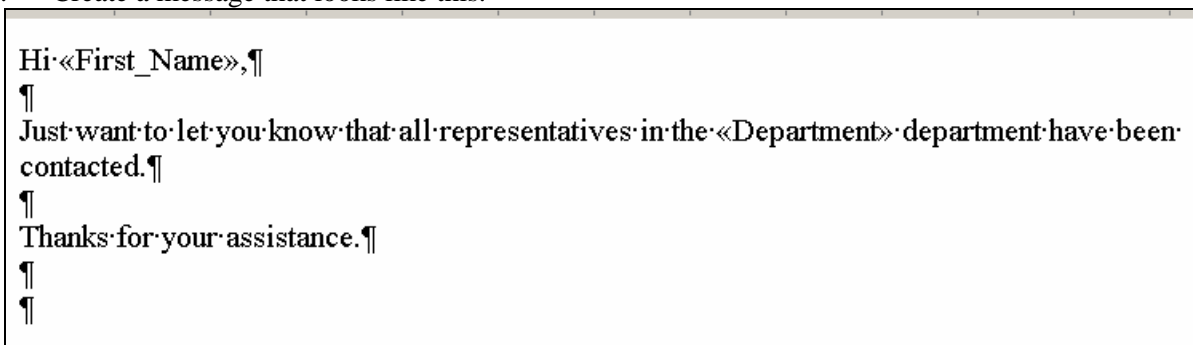


109. For Recipients, choose the file called *maillist.xls* on your N drive. Note that it has a field called Email that contains the email address.

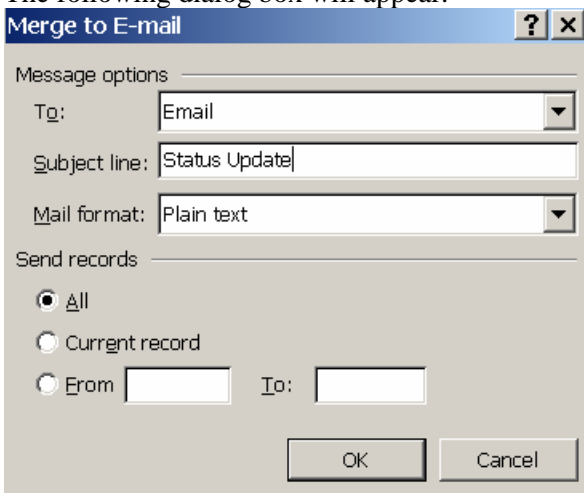


Click *OK*.

110. Create a message that looks like this.



Click *Preview your messages* and when you are satisfied *Complete the merge* and merge to *Email*. The following dialog box will appear.



Enter a Subject line, and make sure that **Plain text** is selected.

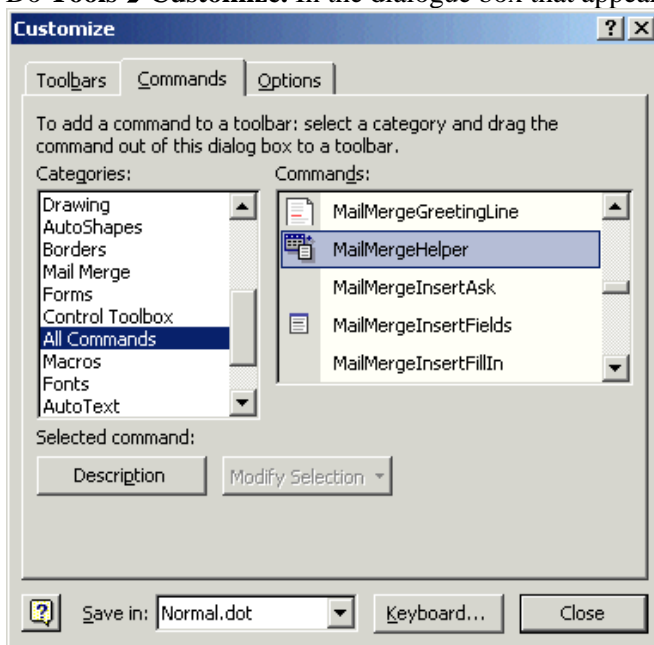
If you want to send your email out in chunks, you can do so by choosing a *From and To* for the record numbers. Click *OK*.

111. Some flickering will appear on your screen.
112. Go to Outlook Express and click on Send/Receive. You will be prompted for your password, which you have been given. Any emails sent by others will appear in your in box. If you want to verify that you actually sent items, click on your Outbox.
113. **Tip:** Always place yourself on the mailing list as the first and last entry. Then if you receive both messages, you can feel certain that your mail merge has worked..

Installing and Using the Word 97/2000 Mail Merge Helper

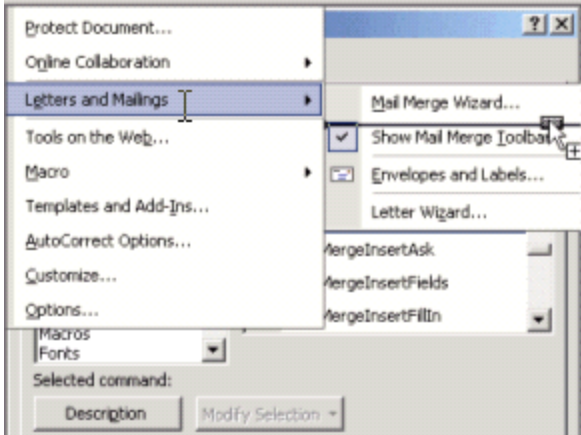
Many people find the new Word 2002 mail merge wizard to be awkward to use and limiting in functionality. They prefer the way it was done in Word 97 and 2000. We will see how to install the old Mail Merge Helper. In addition to being somewhat more straight forward to use, it is more flexible in some ways. For example, when we created our list of recipients earlier, we were offered no choice but to save it as an Access file. However using the Mail Merge Helper, we can save it as a Word document. When we do this, it gets saved in a Word table. This can be much easier to edit within Word.

33. Do **Tools**→**Customize**. In the dialogue box that appears select the *Commands* tab.



Choose *All Commands* under *Categories*, and under *Commands* scroll down to *MailMergeHelper*.

Click on this item, and while holding the mouse button down, drag the item up to the *Tools* menu. The *Tools* menu will open. Drag down to *Letters and Mailings* and it will open. Drag down through that menu, and drop the *Mail Merge Helper* under the *Mail Merge Wizard*.



The line indicates where the dragged item will be dropped. Your *Letters and Mailings* menu should now look like this.

