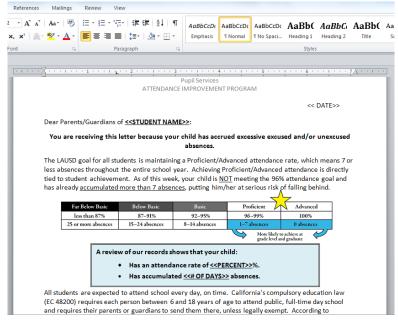
## How to Mail Merge in Word & Publisher

Note: This guide provides instructions for using Excel 2010. If you have an older system, please see the Excel 2007 guide.

Mail merging data from MiSiS into **monthly newsletters, attendance warning letters or certificates** can be a great time saver and help you reach a large group of students efficiently. All you need to do is create a document in Word or Publisher and download data into Excel to create personalized documents for all of your students and parents. If you need help downloading data, please refer to the "How to Download Data from MiSiS" guide.

## Mail merge in Word (letters, notices, certificates, etc.):

1. Create a letter in Word or use one of the program form letters on the toolkit.



- 2. Edit/update the information on the letter such as date, AIC name and contact number. Save the letter after making the changes.
- 3. Next, click on the **Mailings** menu at the top of the page.

File Hom	e Insert	Page Layout Refer	ences Mai	lings	Keview 1	view						
	B			-			🔐 Rules =	-	14 4		$\models \exists H$	
Envelopes Label	Life and		the second se		Greeting Inse	88	≣ 3 Match Fields	0	📲 Fin	d Recipient		Finish &
Envelopes Laber	Merge *		Highlight Merge Fields			Field =	Update Labels	Preview Results	Au	to Check fo	r Errors	Merge *
Create		start Mail Merge		V	Vrite & Insert	Fields			Preview	v Results		Finish

4. Click on the **Start Mail Merge** icon. On the dropdown menu, click on **Step by Step Mail Merge Wizard**.

- 5. The Mail Merge guide will pop up on the right hand side of your screen.
- At the bottom of the menu, you will see which step you are on.
   Step 1: Select document type. Letters is already selected for you. Click on the blue highlighted Next: Starting document.

- Step 2: Select starting document. Use the current document is already selected. Go to the bottom and click on the blue highlighted Next: Select recipients.
- Mail Merge Select document type What type of document are you working on? Use Letters Canado Bandon Canado Bandon Canado Bandon Canado Bandon Mail Merge Canado Bandon Canado

100%



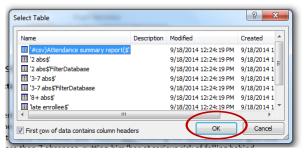


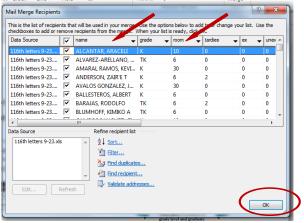
- 8. Step 3: **Select recipients**. In this step, you will use the data you downloaded from MiSiS and formatted in Excel to be merged into your letters.
- Click on the blue highlighted Browse link. A window titled Select Data Source will open. Find the Excel document with the data for your letter. Select the document name and click the Open button.

Organize - New	folder	r				
📃 Recent Places	*	Name		Date modified	Туре	
E Desktop		9-24		9/18/2014 12:5	i6 PM Micr	osoft Excel 97
💱 Dropbox		Alian 9-26		9/18/2014 1:00	PM Micr	osoft Excel 97
		🕙 25th day prep		8/26/2014 2:26	PM Micr	osoft Excel 97
Libraries Documents		🕙 25th day		9/23/2014 9:24	AM Micr	osoft Excel 9
Music		116th letters 9-23		9/18/2014 12:2	4 PM Micr	osoft Excel 9
Pictures		116th Rosters 9-5	Type, where some set of the	xcel 97-2003 Wo	orksheet Micr	osoft Excel 9
Videos	=	🕙 Aug Attendance Kinde	r Size: 59.0 KB Date modified: 9/	19/2014 12:24 D		osoft Excel 9
La videos		🕙 No abs 9-24-26	-	J/ 10/ 2014 12.24 F	Micr	osoft Excel 9
🛤 Computer		School wide 25th day p	rep 9-16	8/26/2014 1:51		osoft Excel 97
Local Disk (C:)		Sept letter 9-5		8/26/2014 2:05		osoft Excel 9
Lexar (E:)		🕙 SMASR 116th 9-4		8/26/2014 1:34	PM Micr	osoft Excel 9
	÷ .	٠ [	III			
		New Source				
	ile na	me		✓ All Data :	Sources	-



- 10. The next window titled Select Table will open. Select the name of the sheet you created in Excel for this letter.After you click on the name, it will be highlighted in blue. Then click the OK button.
- 11. The next window titled **Mail Merge Recipients** will open. Here you can check to make sure you opened the correct list. You can also sort the data here if you did not already in Excel. For example, do you want the letters to be printed in alphabetical order? Sort by name. Do you want the letters to be printed by classroom? Sort by room. When you are done, click **OK**.

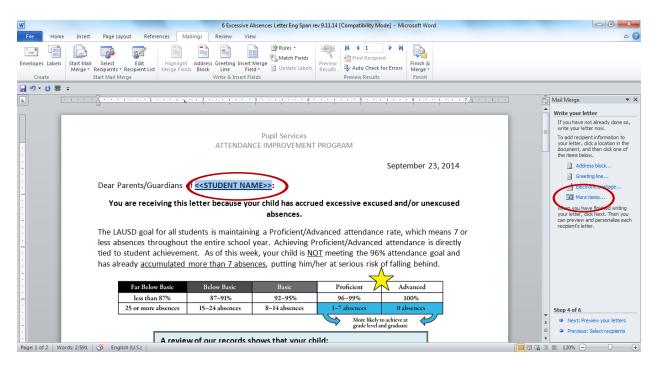




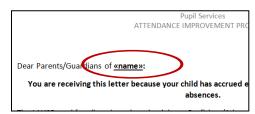
12. Under **Use existing** list, you will now see the name of your list of students and data. (If you ever need to select a different list, you can click on the blue highlighted **Select a different list**.)



- 13. Now that you have selected your data for the letters, click on the blue highlighted **Next:** Write your letter at the bottom of the guide.
- 14. Step 4: Write your letter allows you to enter the data you want to merge into your letter. You will click or highlight on your letter where you want to insert some data. Then you will go to the right hand menu and click on the blue highlighted More Items.



15. A window will pop up titled **Insert Merge Field**. The list of fields shown matches the column headings in your Excel list of students. Click on the data you want entered into that area of the letter. After it is highlighted in blue, click the **Insert** button. After the field is inserted, the **Cancel** button changes to **Close**. Click on the **Close** button and you will see your field inserted into the letter.





16. Now you can repeat the previous step to insert data fields into all areas of your letter.

Dear Parents/Guardians of <u>«name»</u> : You are receiving this letter because your child has accrued excessive excused and/or unexcused absences. The LAUSD goal for all students is maintaining a Proficient/Advanced attendance rate, which means 7 or less absences throughout the entire school year. Achieving Proficient/Advanced attendance is directly to student achievement. As of this week, your child is <u>NOT</u> meeting the 96% attendance goal and has already accumulated more than 7 absences, putting him/her at serious risk of falling behind. <u>Tra Below Basic Below Basic 87~91% 92-95% 96-99% 100%</u> <u>To more absences 15-24 absences 8-14 absences 066</u> More likely to achieve at <u>More likely to achieve at</u> <u>More likely to achieve at</u>				1 1 1		September 23, 2014
absences. The LAUSD goal for all students is maintaining a Proficient/Advanced attendance rate, which means 7 or less absences throughout the entire school year. Achieving Proficient/Advanced attendance is directly tied to student achievement. As of this week, your child is <u>NOT</u> meeting the 96% attendance goal and has already accumulated more than 7 absences, putting him/her at serious risk of falling behind. <u>Fra Below Basic Below Basic Basic Proficient</u> Advanced less than 87% 87-91% 92-95% 96-99% 100% <u>So r more absences 15-24 absences 8-14 absences 1-7 absences 0 absences</u> More likely to achieve at grade level and graduate A review of our records shows that your child: <u>Has an attendance rate of {=«percentage»*100\#0.00%}.</u> <u>Has accumulated «fdabs» absences.</u>	Dear I	Parents/Guardians	of <u>«name»</u> :			
less absences throughout the entire school year. Achieving Proficient/Advanced attendance is directly tied to student achievement. As of this week, your child is NOT meeting the 96% attendance goal and has already accumulated more than 7 absences, putting him/her at serious risk of falling behind.         Far Below Basic       Basic       Proficient         Less than 87%       87-91%       92-95%       96-99%         25 or more absences       15-24 absences       8-14 absences       1-7 absences       0 absences         More likely to achieve at grade level and graduate       More likely to achieve at level and graduate       More likely to achieve at level and graduate         A review of our records shows that your child: <ul> <li>Has an attendance rate of {=«percentage»*100\#0.00%}.</li> <li>Has accumulated <u>«fdabs»</u>absences.</li> </ul>	Yo	ou are receiving this	s letter because yo		ed excessive excu	sed and/or unexcused
less than 87%     87–91%     92–95%     96–99%     100%       25 or more absences     15–24 absences     8–14 absences     1–7 absences     0 absences       More likely to achieve at grade level and graduet     More likely to achieve at grade level and graduet     Image: Second	less al tied to	bsences throughou o student achievem	t the entire school ent. As of this wee	year. Achieving Plek, your child is <u>NC</u>	oficient/Advanced T meeting the 969	l attendance is directly % attendance goal and
25 or more absences       15-24 absences       8-14 absences       1-7 absences       0 absences         More likely to achieve at grade level and graduate       More likely to achieve at grade level and graduate       More likely to achieve at grade level and graduate         A review of our records shows that your child:       •       Has an attendance rate of {=«percentage»*100\#0.00%}.         •       Has accumulated <u>«fdabs»</u> absences.		Far Below Basic	Below Basic	Basic	Proficient	Advanced
More likely to achieve at grade level and graduate A review of our records shows that your child: • Has an attendance rate <u>of {=«percentage»*100\#0.00% }</u> . • Has accumulated <u>«fdabs»</u> absences.		less than 87%	87-91%	92-95%	96-99%	100%
grade level and graduate         A review of our records shows that your child:         • Has an attendance rate of {=«percentage»*100\#0.00%}.         • Has accumulated <u>«fdabs»</u> absences.		25 or more absences	15–24 absences	8–14 absences	1–7 absences	0 absences
<ul> <li>Has an attendance rate of <u>{=«percentage»*100\#0.00%}</u>.</li> <li>Has accumulated <u>«fdabs»</u> absences.</li> </ul>						
	·	A revie	Has an attend	ance rate <u>of {=«pe</u>	rcentage»*100\#	<u>0.00% }</u> .
All students are expected to attend school every day, on time. California's compulsory education law	All stu	udents are expected	to attend school e	every day, on time.	California's com	oulsory education law

- 17. When inserting the attendance percentage in mail merge, the numbers sometimes come out with too many decimal places. Use these steps to correct that problem.
  - a. <u>To control percentage formatting in Word that displays like 0.8333333333338</u>:
    - 1. Highlight your mergefield, which will look something like «Percent»
    - 2. Press Ctrl-F9 to wrap another field around it like this { **«Percent»** }
    - 3. Edit the field so that you get {=«Percent»\*100\#0.00%}
    - 4. Position the cursor anywhere in this field and press F9 to update it
    - 5. Your percentage should now display as 83.33%
  - b. If the percentage displays like 83.3333333333333, then input this formula:
    - 1. Highlight your mergefield, which will look something like «Percent»
    - 2. Press Ctrl-F9 to wrap another field around it, thus { **«Percent»** }
    - 3. Edit the field so that you get {=«Percent» \#0.00%}
    - 4. Position the cursor anywhere in this field and press F9 to update it
    - 5. Your percentage should now display as 83.33%

*Note: The precision of the displayed value is controlled by the '0.00.' You can use anything from '0' to '0.0000000000000000.'* 

- 18. Step 5: Preview your letters. Here you can see what your letters will look like when printed. Click on the arrows next to Recipient: and you can scroll through a few individual letters to check for any spacing or formatting issues. After you are satisfied with the look of your letters, go to the bottom and click on the blue highlighted Next: Complete the merge.
  - a. In case you don't want to print letters for all the students in your list, the blue highlighted Edit recipient list will allow you to select which students' letters you want to print.
- 19. Step 6: **Complete the merge**. Now it is time to print your letters. Click on the blue highlighted **Print**.
- 20. A window will pop up titled **Merge to Printer**. It gives the option of printing all records, current record or a specific range. Leave it on the default of **All** and then click the **OK** button.

<u>T</u>o:

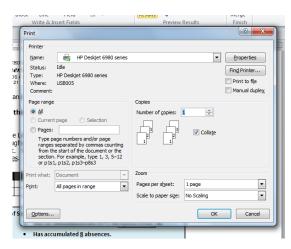
OK Cancel

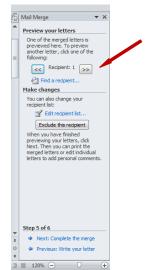
Advan

Print records

ent <u>Erom</u>:

- 21. Next the **Print** window will open. Make sure the correct printer is in the **Name** box and the correct settings are selected under **Properties** (color, printing on both sides, etc).
- 22. Click the **OK** button and you will soon have your mail merged letters.



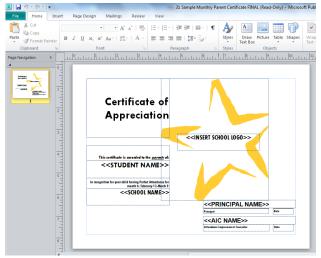




## Mail merge in Publisher (certificates, postcards, tickets, etc.):

\*The steps in this guide use the example of a certificate, but any type of Publisher document can be used.

1. Create a certificate in Publisher or use one of the program forms on the toolkit.



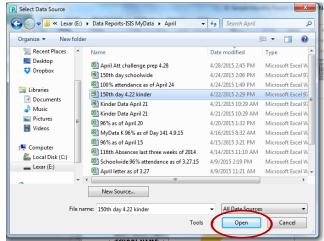
- 2. Edit/update the information on the certificate such as dates, Principal and AIC name, and school name and logo. Save the certificate after making the changes.
- 3. Next, click on the Mailings menu at the top of the page.



- 4. Click on the **Mail Merge** icon. On the dropdown menu, click on **Step by Step Mail Merge Wizard**.
- The Mail Merge guide will pop up on the right hand side of your screen. It gives an overview of How Mail Merge works. At the bottom of the menu, you will see which step you are on.
- Step 1: Create recipient list. Use an existing list is already selected for you. Click on the blue highlighted Next: Create or connect to a recipient list.



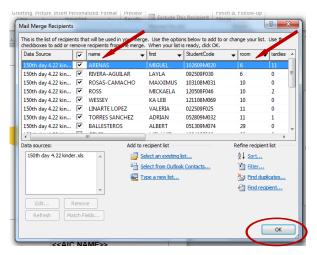
7. A window titled **Select Data Source** will open. Find the Excel document you created with the data for your certificate. Select the document name and click the **Open** button.



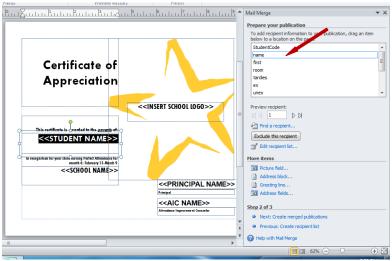
 The next window titled Select Table will open. Select the name of the sheet you created in Excel for this letter. After you click on the name, it will be highlighted in blue. Then click the OK button.

	4/22/2015 2:29:06 PM	4/2
	4/22/2015 2:29:06 PM	4/2
e	4/22/2015 2:29:06 PM	4/2
	4/22/2015 2:29:06 PM	4/2
	e	4/22/2015 2:29:06 PM 4/22/2015 2:29:06 PM 4/22/2015 2:29:06 PM 4/22/2015 2:29:06 PM e 4/22/2015 2:29:06 PM

9. The next window titled Mail Merge Recipients will open. Here you can check to make sure you opened the correct list. You can also sort the data here if you did not already in Excel. For example, do you want the certificates to be printed in alphabetical order? Sort by name. Do you want the certificates to be printed by classroom? Sort by room. When you are done, click OK.



10. Now Step 2: Prepare your publication will show in the guide on the right hand side of your screen. This step allows you to enter the data you want to merge into your certificate. You will click or highlight on your certificate where you want to insert some



data. Then you will go to the right hand menu and click on item you want inserted into your document.

- 11. After you insert all the items you want to merge into your certificate, click on the blue highlighted **Next: Create merged publications** at the bottom of the guide.
- 12. **Step 3: Create merged publications** will allow you to preview and print your certificates.



P.         III         IIII         IIIII         IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	31 S Insert Page Design Mailings Review View	1 Sample Monthly Parent Certificate FINAL (Read-Only) - Microsoft Publisher	- 0 <u>×</u>
Jave           Save As           Image: Open           Image: Close	Print Copies of print job: 1 \$		
Info Recent	Printer () HP Deskjet 6980 series		
New Print Save & Send Help D Options	Continue Printer Properties Settings   Print All Records Print all merge records Records: Don't print lines without records  Con page per sheet	Appreciation <>	
Exit	Letter 8.5 x11" Print One Sided Onposite Grayscale Print as grayscale publication. Save settings with publication	In recognition for your dill beings Path de Attrictance for mando:.torizey 13.Marka 9 < <school name="">&gt; Praced School NAME&gt;&gt; Praced School NAME&gt;&gt; Praced Praced Praced School NAME&gt; Praced Praced Praced School NAME&gt; Praced</school>	
🧿 🔀	👌 🔣 🧿 🍝 🚞 💽		to The table of the table of the table of table

13. Click on the blue highlighted **Print Preview** to review your certificates, if necessary.

You can preview your individual certificates by clicking on the arrows underneath the certificate.

- 14. After reviewing your certificates, make sure the correct printer is showing under **Printer** and the correct settings are selected under **Printer Properties** (color, printing on both sides, etc).
- 15. Click the **OK** button and you will soon have your mail merged certificates.