

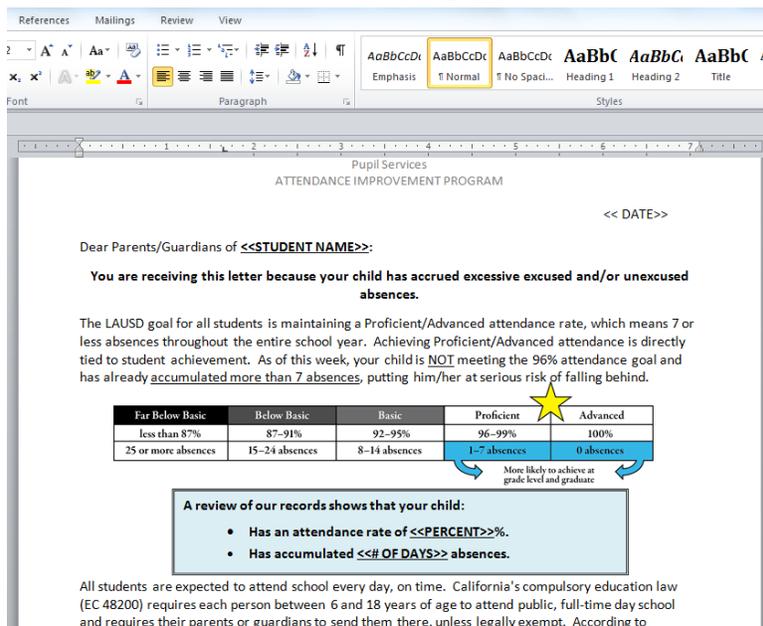
# How to Mail Merge in Word & Publisher

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.

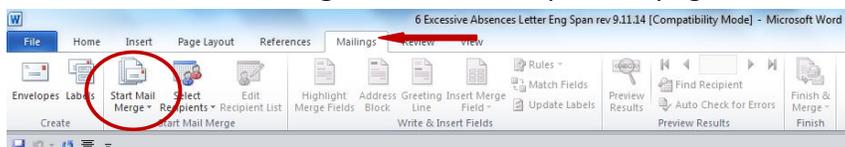
## Mail merge in Word (letters, notices, certificates, etc.):

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

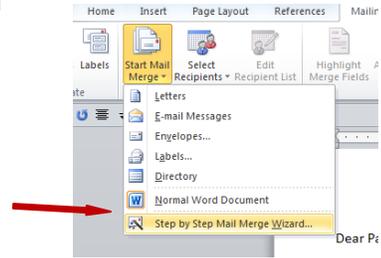


2. Edit/update the information on the letter such as date, AIC name and contact number. Save the letter after making the changes.

3. Next, click on the **Mailings** menu at the top of the page.



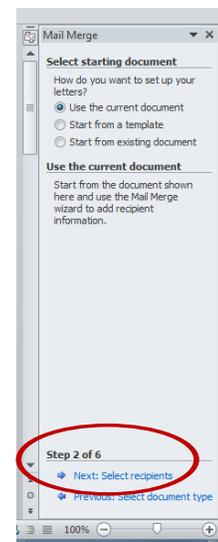
4. Click on the **Start Mail Merge** icon. On the dropdown menu, click on **Step by Step Mail Merge Wizard**.



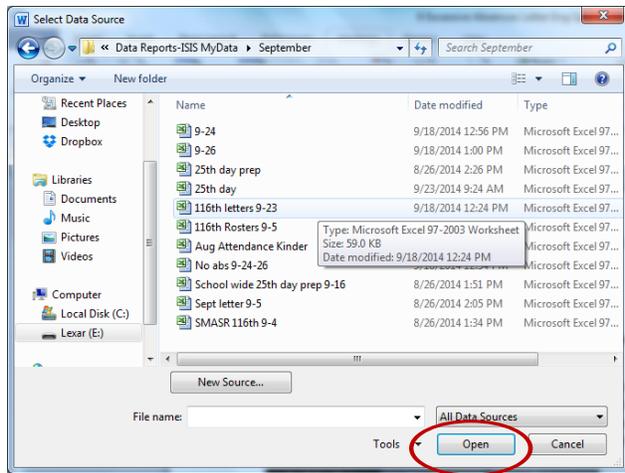
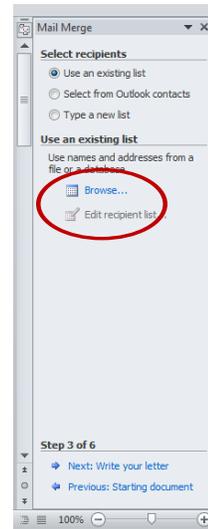
5. The Mail Merge guide will pop up on the right hand side of your screen.
6. At the bottom of the menu, you will see which step you are on. Step 1: **Select document type**. Letters is already selected for you. Click on the blue highlighted **Next: Starting document**.



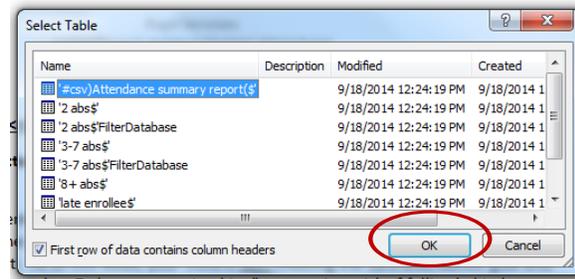
7. Step 2: **Select starting document**. Use the current document is already selected. Go to the bottom and click on the blue highlighted **Next: Select recipients**.



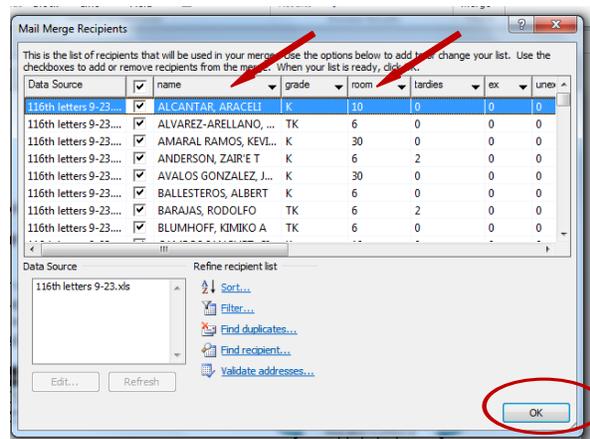
- Step 3: **Select recipients**. In this step, you will use the data you downloaded from MiSiS and formatted in Excel to be merged into your letters.
- Click on the blue highlighted **Browse** link. A window titled **Select Data Source** will open. Find the Excel document with the data for your letter.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



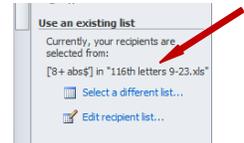
- The next window titled **Select Table** will open. Select the name of the sheet you created in Excel for this letter. After you click on the name, it will be highlighted in blue. Then click the **OK** button.



- 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**.

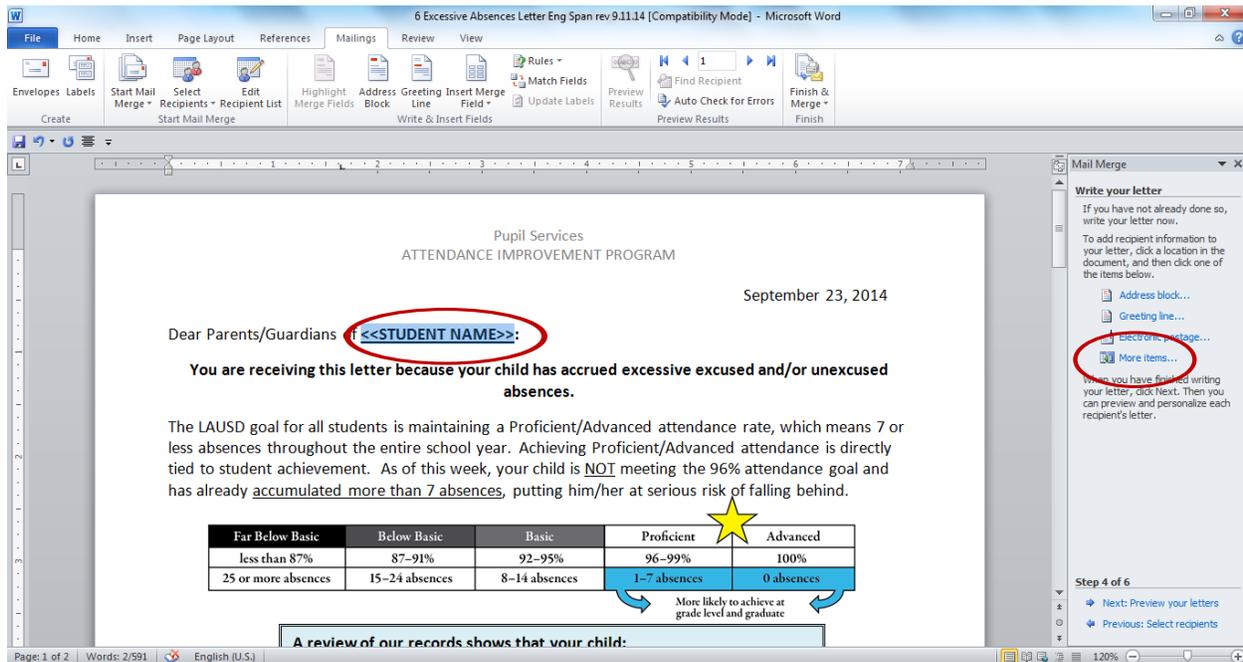


12. Under **Use existing list**, you will now see the name of your list of students and data. (If you ever need to select a different list, you can click on the blue highlighted **Select a different list.**)

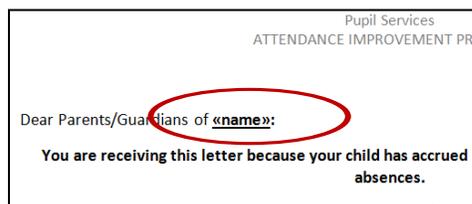
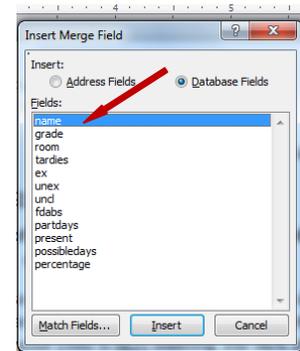


13. Now that you have selected your data for the letters, click on the blue highlighted **Next: Write your letter** at the bottom of the guide.

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.

September 23, 2014

Dear Parents/Guardians of «name»:

**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 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	Below Basic	Basic	Proficient	Advanced
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 graduate

A review of our records shows that your child:

- Has an attendance rate of {=«percentage»\*100\#0.00%}.
- Has accumulated «fdabs» absences.

All students are expected to attend school every day, on time. California's compulsory education law

Words: 588 | English (L.S.)

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. To control percentage formatting in Word that displays like 0.833333333333%:

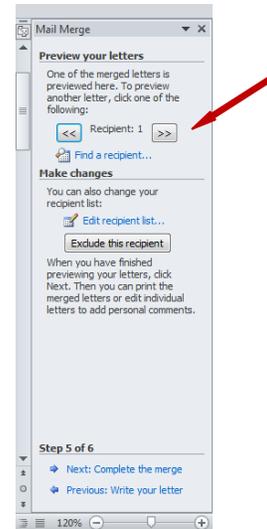
1. Highlight your mergefield, which will look something like «Percent»
2. Press Ctrl-F9 to wrap another field around it like this { «Percent» }
3. Edit the field so that you get {=«Percent»\*100\#0.00%}
4. Position the cursor anywhere in this field and press F9 to update it
5. Your percentage should now display as **83.33%**

b. If the percentage displays like 83.33333333333333%, 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%**

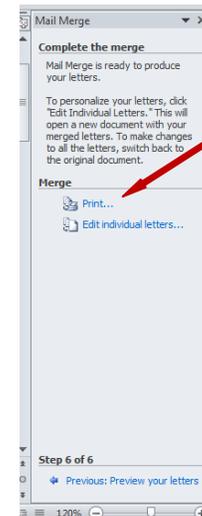
*Note: The precision of the displayed value is controlled by the '0.00.'* You can use anything from '0' to '0.0000000000000000.'

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.**

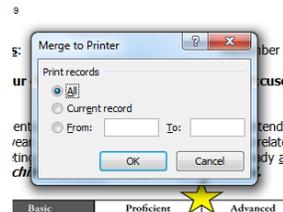


- a. In case you don't want to print letters for all the students in your list, the blue highlighted **Edit recipient list** will allow you to select which students' letters you want to print.

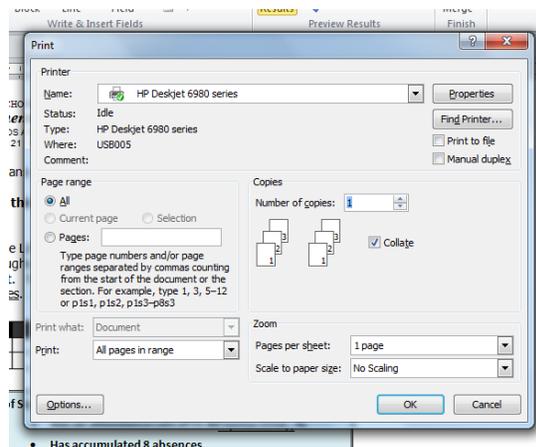
19. Step 6: **Complete the merge.** Now it is time to print your letters. Click on the blue highlighted **Print.**



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.



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).

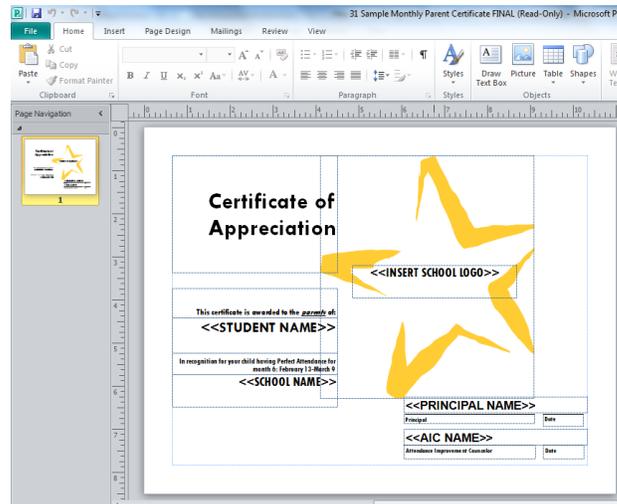


22. Click the **OK** button and you will soon have your mail merged letters.

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

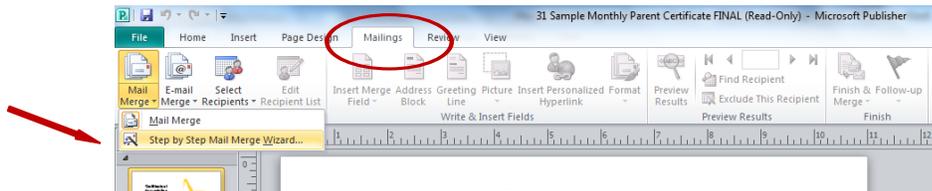
\*The steps in this guide use the example of a certificate, but any type of Publisher document can be used.

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.

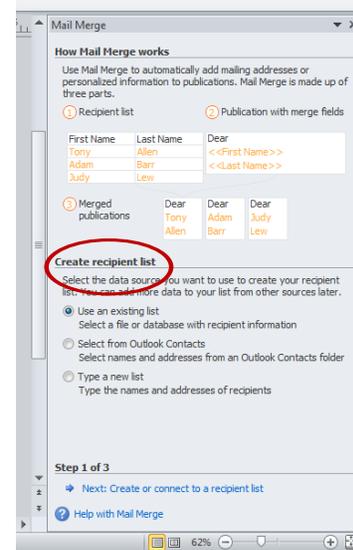
3. Next, click on the **Mailings** menu at the top of the page.



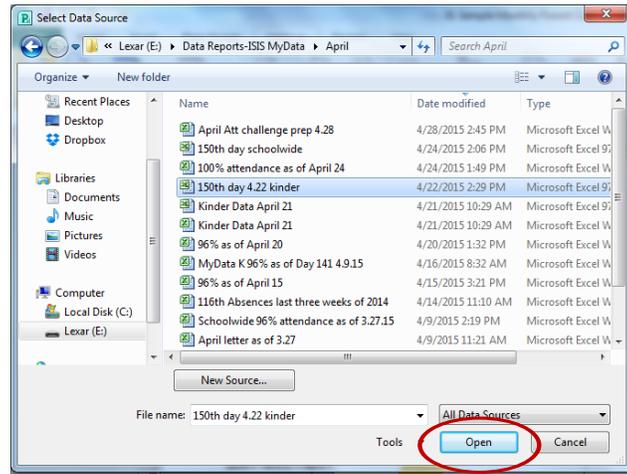
4. Click on the **Mail Merge** icon. On the dropdown menu, click on **Step by Step Mail Merge Wizard**.

5. 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.

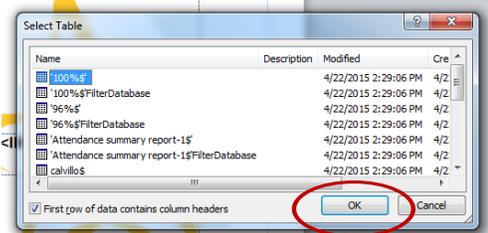
6. Step 1: **Create recipient list**. Use an existing list is already selected for you. Click on the blue highlighted **Next: Create or connect to a recipient list**.



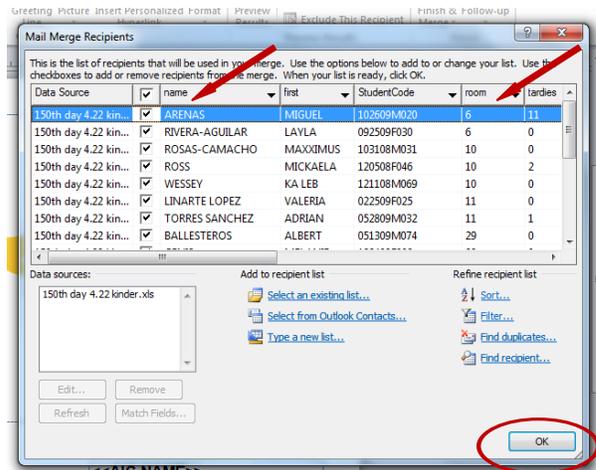
- A window titled **Select Data Source** will open. Find the Excel document you created with the data for your certificate. Select the document name and click the **Open** button.



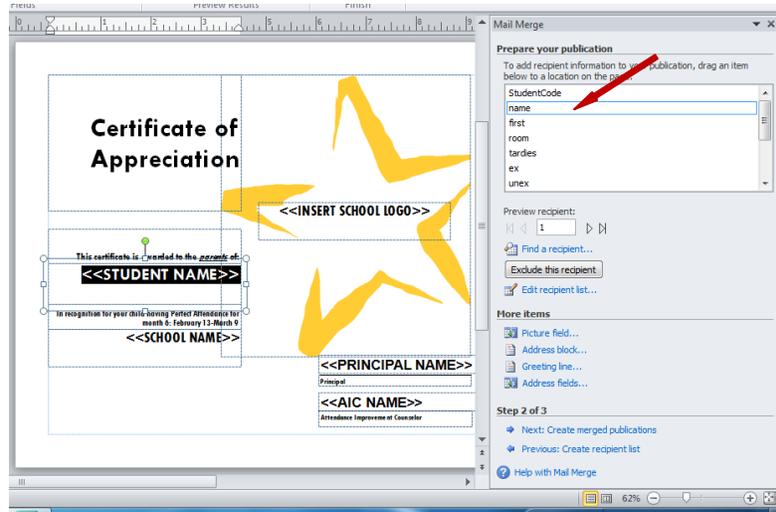
- The next window titled **Select Table** will open. Select the name of the sheet you created in Excel for this letter. After you click on the name, it will be highlighted in blue. Then click the **OK** button.



- 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**.

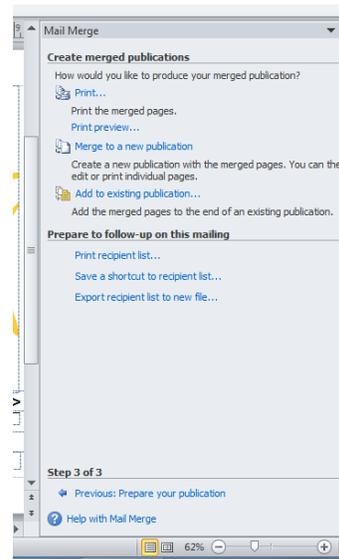


10. Now **Step 2: Prepare your publication** will show in the guide on the right hand side of your screen. This step allows you to enter the data you want to merge into your certificate. You will click or highlight on your certificate where you want to insert some data. Then you will go to the right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

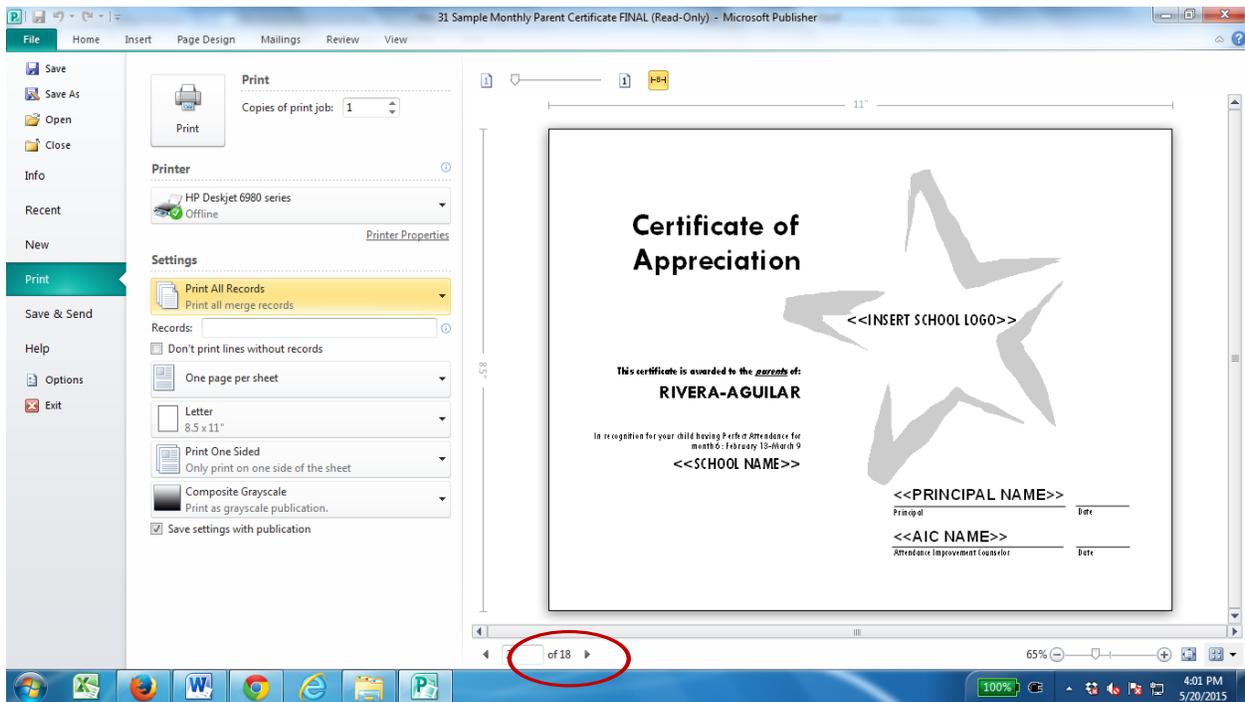


11. After you insert all the items you want to merge into your certificate, click on the blue highlighted **Next: Create merged publications** at the bottom of the guide.

12. **Step 3: Create merged publications** will allow you to preview and print your certificates.



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.