PineSoft Professional Training Database

Use of Microsoft Word Mail Merge to Create Customised Reports or Letters
Word 2002 / XP Procedure

Introduction

Using the Microsoft Mail Merge Toolbar or Mail Merge Wizard - Letters option it is possible to produce customised, more flexible output to suit individual requirements listing ANY PineSoft fields. We will produce the report "FORM3(CS)" shown on the last page of sample output in the PineSoft User Manual (before the yellow section break sheet) : The output we are going to produce is also attached to this handout for convenience.

Procedure

(1) To Export Data from PineSoft
Open PineSoft and use the "**Export List**" option to export all (or required) placement data to a file with name   merge_placement.txt

(2) To Create the Mail Merge Document in Word
Load Microsoft Word (starting with the default blank document)

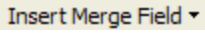use   **Page Setup** and set all margins to 2 cm.

(Use **View > Toolbars** to check that the Mail Merge Toolbar is ticked.) If the **"Insert Merge Field"** option does not appear in the toolbar, add it via the Add Buttons option – you need this to enter PineSoft fields.
You should see the "Mail Merge Toolbar" displayed below

You may use the Toolbar buttons or the Mail Merge Wizard to create the document.

Method 1 (Using the Toolbar buttons)

1 Click ⬚ **(Main document setup)** and select document type – Letters

2 Click ⬚ **(Open Data Source)** browse & select as data source – merge_placement.txt

3 Click ⬚ **(Mail Merge Recipients)** if you require to sort or select a subgroup

4 Write your letter/report using `Insert Merge Field ▾` to insert PineSoft fields

Refer to the output attached to this handout and create a similar format. The first output shows the use of PineSoft merge fields such as <<Mailname>> and the use of tables to align contact details. In the final output the table borders have been switched off to show the required output.

5 Click ⬚ **(View Merged Data)** to toggle between field & preview mode

    Click `|◀ ◀ 1 ▶ ▶|` to navigate and preview records

6 Use **File>Save as** to save this report with name Report_Form3_XP.doc

7 Click ⬚ **(Merge to New Document)** or ⬚ **(Merge to Printer)** to output your mail merge document, as required.

NOTES

1. To adjust the layout of the report you can return to the saved report Report_Form3_XP.doc, and make adjustments until you are happy with the results.

2. To re-use a created report at some later time, it is simply a matter of exporting the required data from PineSoft to overwrite the file merge_placement.txt and the report Report_Form3_XP.doc will automatically display the updated data.

Method 2 (Using the Mail Merge Wizard)

use   **Tools > Letters and Mailings > Mail Merge Wizard . . >**
Select document type – Letters

1 Next: Starting document

2 Next: Select recipients (Use the current document)
Browse..   (Use an existing list)

Select Data Source (select merge_placement.txt)
{Use the "Mail Merge Recipients" dialog to sort data if required.}

3 Next: Write your letter

Refer to the output attached to this handout and create a similar format. The first output shows the use of PineSoft merge fields such as <<Mailname>> and the use of tables to align contact details. In the final output the table borders have been switched off to show the required output.

4 Next : Preview your letters

(3) Save the Report

Use **Save as** to save this report with name Report_Form3_XP.doc

5 Next : Complete the merge

you may then print your "Mail Merge" report, if required

NOTES
To adjust the layout of the report you can return to the saved report Report_Form3_XP.doc, make the adjustments and repeat step four above until you are happy with the results. Step 3 in the Mail Merge Wizard may be used to "Edit recipient list.." to sort records etc

UNIVERSITY OF ABERTAY DUNDEE
School of Computing & Advanced Technologies

Professional Training : Company Report

Student	«Mailname»	**Year**	«Yearstu»
Company	«Company» «Street» «Town» «County» «Postcode»	**Supervisor** «Supervisor» **Designation** «Supstatus» **Start Date** «Start»	

1. Student's performance – please tick appropriate box :

	Excellent	*Good*	*Average*	*Poor*
Intellectual ability				
Diligence				
Initiative				
Reliability				
Ability to work with team				
Ability to work on own				
Ability to discuss progress				
Willingness to learn				
Personal behaviour				

2. Remarks

Note :   To display the Start Date without the time 00:00:00 being shown :
click [Alt][F9] and the <<Start>> field changes to { MERGEFIELD Start }
edit the field to display { MERGEFIELD Start \@"d MMMM yyyy"}
then click [Alt][F9] again
(See Microsoft Help for other valid date switches)

Signature : . . . .   **Date :** . . . .

Please return to :   *Dr Stuart K Donald, University of Abertay Dundee, School of Computing &*
Advanced Technologies, Bell Street, Dundee DD1 1HG
Tel: 01382 308606

UNIVERSITY OF ABERTAY DUNDEE
School of Computing & Advanced Technologies

Professional Training : Company Report

Student	Stewart Clark	Year	2
Company	Building Research Establishment Station Road Watford	Supervisor	Dr Gary McPherson
		Designation	Training Manager
		Start Date	7 February 2000

1. Student's performance – please tick appropriate box :

	Excellent	*Good*	*Average*	*Poor*
Intellectual ability				
Diligence				
Initiative				
Reliability				
Ability to work with team				
Ability to work on own				
Ability to discuss progress				
Willingness to learn				
Personal behaviour				

2. Remarks

Signature : . . . .   Date : . . . .

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