



Mail Merge

.....Rather than typing the same information repeatedly you can set up a mail merge between the Student Academic Misconduct Worksheet and Summary Record.

There are four steps to a mail merge:

- Create the **Main Document**- a document which contains the identical information you wish to send to each person (in this case it's the 'Summary Record').
- Create a **Data document** ... which contains a list of all the information that varies.... (In this case the Student Academic Misconduct Worksheet- you will need to have entered the relevant data in the spreadsheet for the mail merge to work).
- Indicate on the **Summary Record** where you want the variable information to be displayed. (You will need to type in the College and School names and save the document!)
- **Merge** the two documents together.

...

To perform mail merge into the SUMMARY RECORD

Open the **Summary Record** document

- From the **Mailings** tab, click on **Start Mail Merge** command.
- Select **Step by Step Mail Merge Wizard** from the drop down list.
Note the Mail Merge Task Pane opens

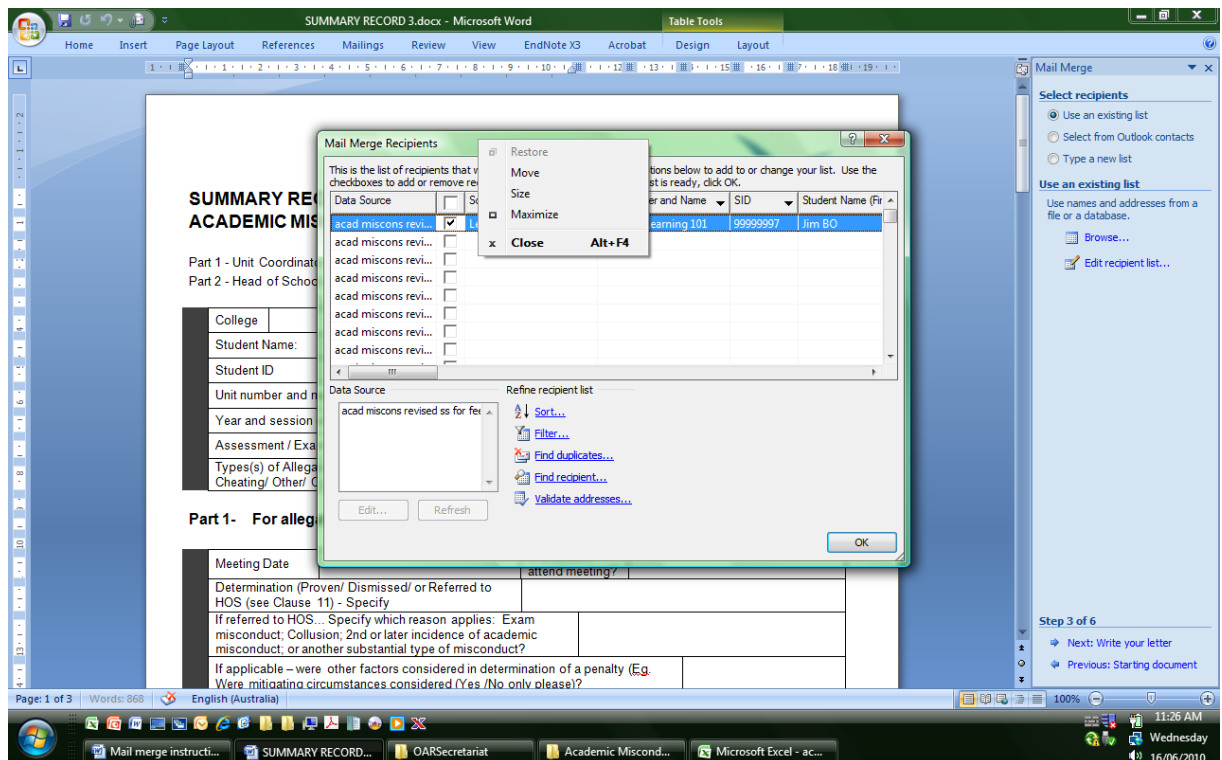
The main document

- Choose **Letters** under Select document type
- Click on **Next: Starting Document** at bottom of Task Pane and choose one of the following options:
- Choose **Start** from existing document
- Click on **Use Existing Document** (the Summary Record)

The recipients

- Click **Next: Select Recipients** at bottom of task pane and choose one of the following options:
- Choose **Use an existing list**.
 - Click **Browse** and locate and select your **Student Academic Misconduct Worksheet**.
 - Make sure you have the right one.
 - Click **OK**.

- Deselect all by clicking on the **tick box** beside **Data Source**, then check only the lines you wish to merge (see below).



Inserting merge fields

- Click **Next: Write your letter** at bottom of Task Pane
- Place your cursor where you want to insert each of the information fields in your **SUMMARY RECORD** document
- Click on **More Items**
- Click **Student Name** to insert student name in the appropriate blank cell.
- Click **SID** to insert Student Identification Number in the appropriate blank cell.
- Repeat process for all other fields in the Summary Record.
- **Save** if you wish to.

The merge

- Click **Next: Complete the merge** at the bottom of the Task Pane
- You can now **Print** or **Edit individual Summary Records**
Note Word only shows you one of the merged letters here, but when you press **Print**, all letters will go to the printer. If you select Edit individual letters, all of the merged letters will be displayed in a separate document.

Save the documents individually. You will need to do this so that you can add the outcome letter to each before TRIMming them to the student and meeting files.