

Nesterenko Software - Attendance Assistant Application

Instructions for performing the Mail Merge – using MS Word 2007 (or MS Word 2010).

(Revised Nov. 2013)

Note 1: A Mail Merge document is a complex, powerful document. It can be intimidating to a user who is using it for the first time. These instructions are helpful. Be patient.

Note 2: The instructions generally refer to AbsenceLetter1.doc and AbsenceLetter1MailMergeQuery. But if, for instance, you are opening AbsenceLetter2.doc, you would connect to AbsenceLetter2MailMergeQuery etc.

Note 3: Generally you would initially be supplied with a ‘template’ AbsenceLetter1.doc. This is used to ‘connect’ with the Letter 1 tab within the Attendance Assistant Application and generate Letters. You may later need to have an AbsenceLetter2.doc and connect with the Letter 2 tab within the Attendance Assistant Application. You would create AbsenceLetter2.doc yourself by following the instructions in Part C. By the time you need AbsenceLetter2.doc, you would likely be reasonably comfortable with the operation of the Attendance Assistant Application and also how to use an MS Word Mail Merge.

The most common steps are categorized here in A, B, C, D, E, F with instructions following in the pages below.

A - Launch Letter AbsenceLetter1.doc for the first time. See instructions below – Page 2.

B - Launch LetterAbsenceLetter1.doc each subsequent time – Page 5.

C - Creating a new AbsenceLetter2.doc – Perhaps you have used AbsenceLetter1.doc to create Letter 1 within the application. Now you want to create an AbsenceLetter2.doc and connect that letter to Letter 2 within the application – Page 6.

D - Previewing the Letter– Browsing Through Letters – Page 9

E -Editing the Letter – Page 11

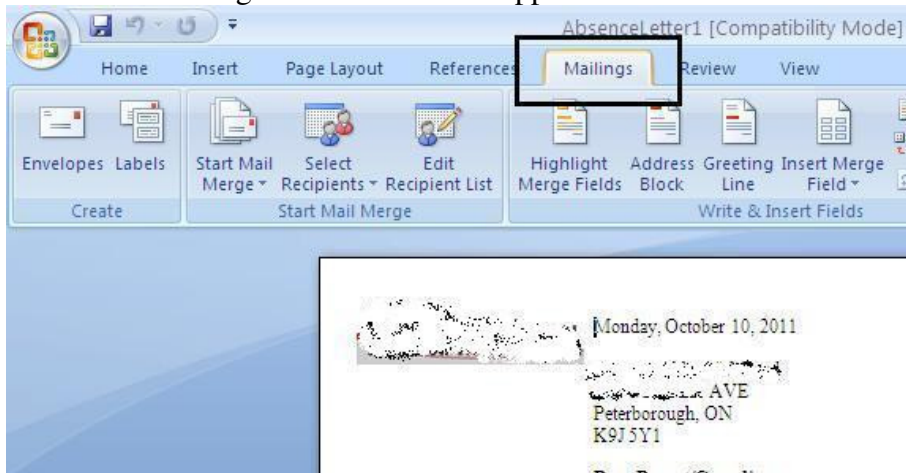
F - Performing a Mail Merge – Generating the Individual Mail Merge Attendance Letters - Page 12

A-1. Each time you open the AbsenceLetter1.doc (Letter1 Mail Merge Template), you will be asked if you want to connect to the AbsenceLetter1MailMergeQuery – for this very first time only, click No.

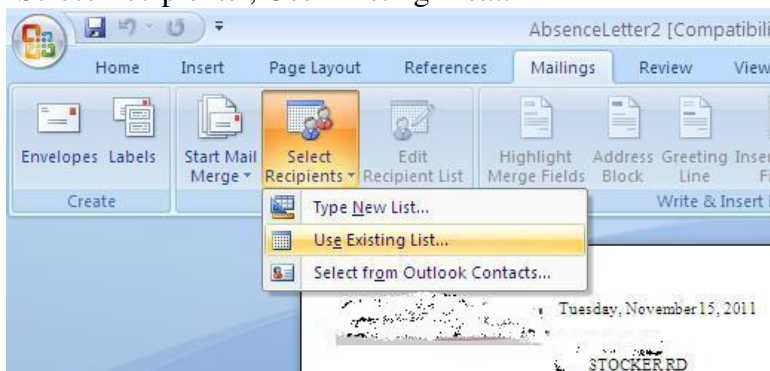


A-2. When the letter displays in MS Word, it will not be 'connected' to any Letter data. The next steps will 'connect' the letter with AbsenceLetter1MailMergeQuery within the Attendance Assistant application.

Select the 'Mailings' menu within the upper Menu ribbon



A-3. Now we want to connect with a data source (AbsenceLetter1MailMergeQuery), so click on 'Select Recipients', Use Existing List...

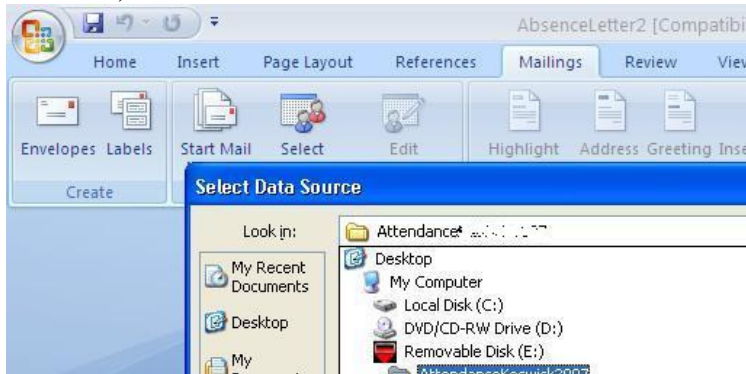


A-4. You will then find your Data Source – Click on the drop down arrow to the right of Look in: My Data Sources.



**** Note – You may also have a different Dialog window appear. It may ask which type of file to connect with. Select Microsoft Access databases of type .mde (or similar).**

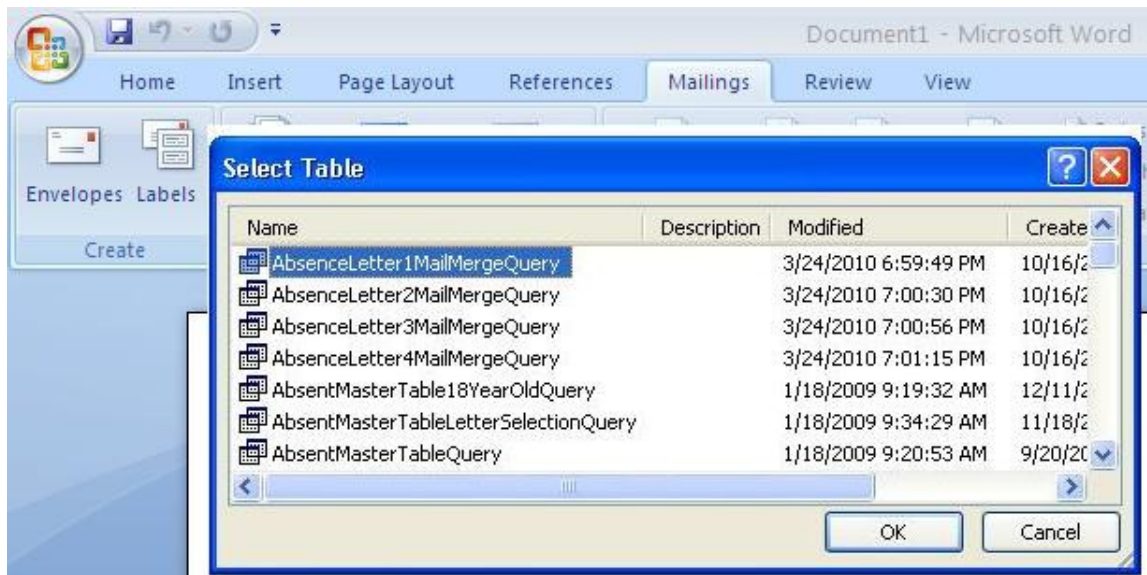
A-5. Then Browse to the folder which contains the Attendance_v130183_ABCD.mde file (similar filename).



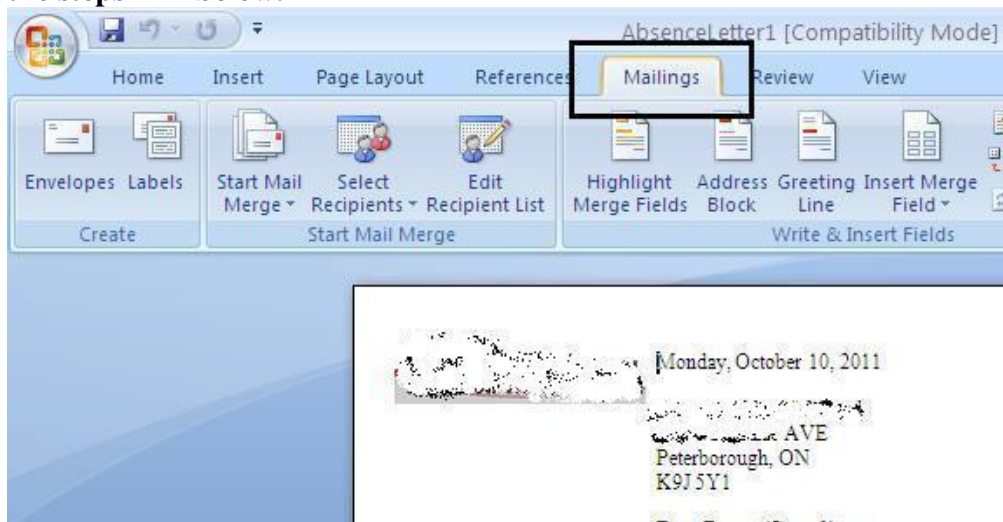
A-6. Browse to find file (continued). Double-click on Attendance_v130183_ABCD.mde file (similar filename)



A-7. Then Select the AbsenceLetter1MailMergeQuery – OK. The document should open in MS Word.



A-8. When the letter displays in MS Word, browse/preview the letter by performing the steps in **D** below. To edit/change the letter, perform the steps in **E** below. Then to generate letters perform the steps in **F** below.

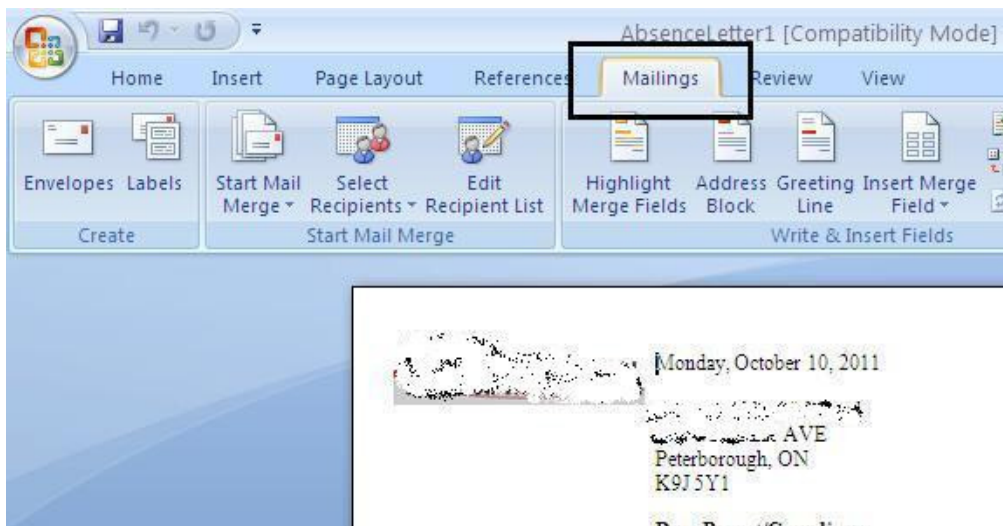


B-1. You should have previously ‘connected’ AbsenceLetter1.doc to the correct data source (AbsenceLetter1MailMergeQuery) by following the steps in A. The ‘connection’ will be remembered by AbsenceLetter1.doc so that each subsequent time the letter should open correctly and be connected with AbsenceLetter1MailMergeQuery.

When you launch the AbsenceLetter1.doc each subsequent time, you will be asked if you want to connect to the AbsenceLetter1MailMergeQuery – click Yes.



B-2. When the letter displays in MS Word, browse/preview the letter by performing the steps in **D** below. **To edit/change the letter, perform the steps in E below. Then to generate letters perform the steps in F below.**



Perhaps you have used AbsenceLetter1.doc to create Letter 1 within the application. Now you want to create an AbsenceLetter2.doc and 'connect' that letter to Letter 2 within the application. This step CC) must be done once to 'connect' AbsenceLetter2.doc to AbsenceLetter2MailMergeQuery within the application, rather than AbsenceLetter1MailMergeQuery.

After this has been done, and the AbsenceLetter2.doc saved, the AbsenceLetter2.doc will connect to the correct AbsenceLetter2MailMergeQuery within the app each subsequent time.

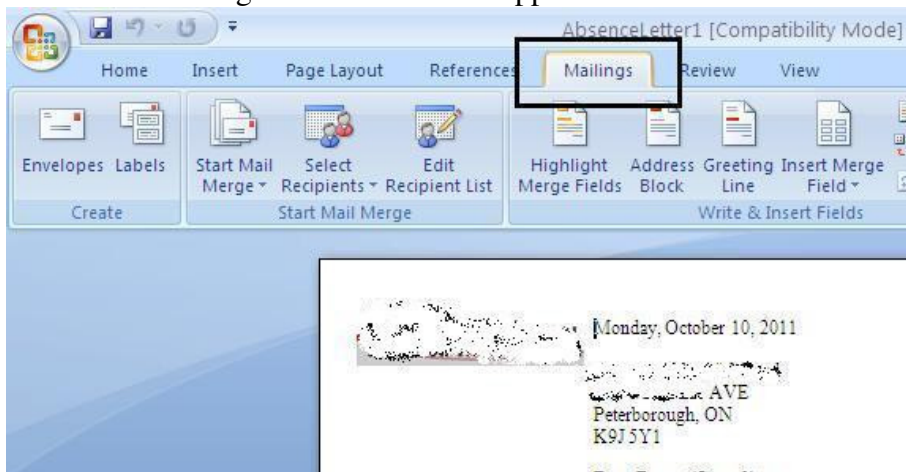
Suppose that you have been using AbsenceLetter1.doc. Now you want to have an AbsenceLetter2.doc.

C-1. Create a copy of AbsenceLetter1.doc called AbsenceLetter2.doc. (Use My Documents or similar and copy/paste AbsenceLetter1.doc)

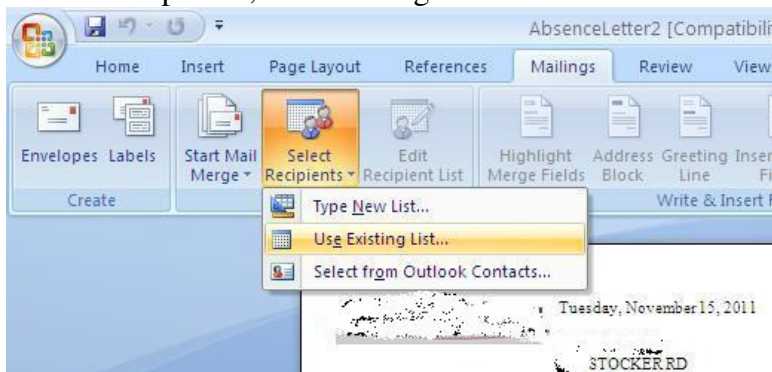
C-2. Open AbsenceLetter2.doc. You will be asked if you want to connect to the AbsenceLetter1MailMergeQuery – click Yes - The letter will open and be connected to AbsenceLetter1MailMergeQuery , **which we will fix this in the following steps by connecting to . AbsenceLetter2MailMergeQuery**



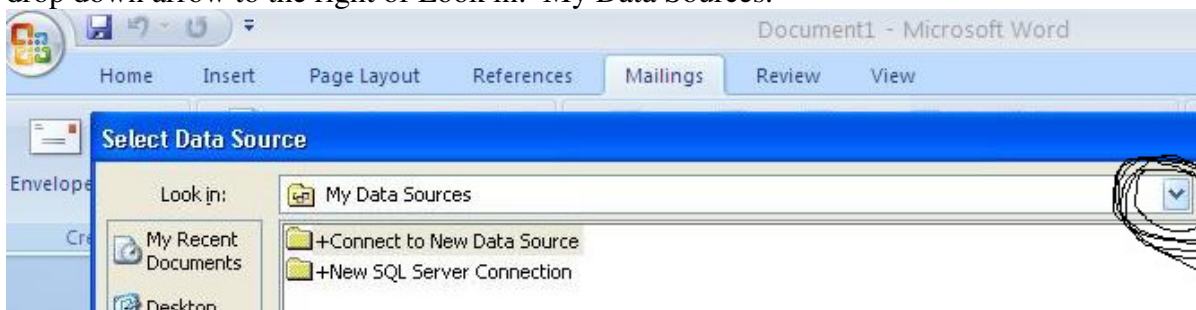
C-3. When the letter displays in MS Word, it will be connected to Letter 1 rather than Letter 2 within the application. The next steps will 'connect' the letter with Letter 2. Select the 'Mailings' menu within the upper Menu ribbon



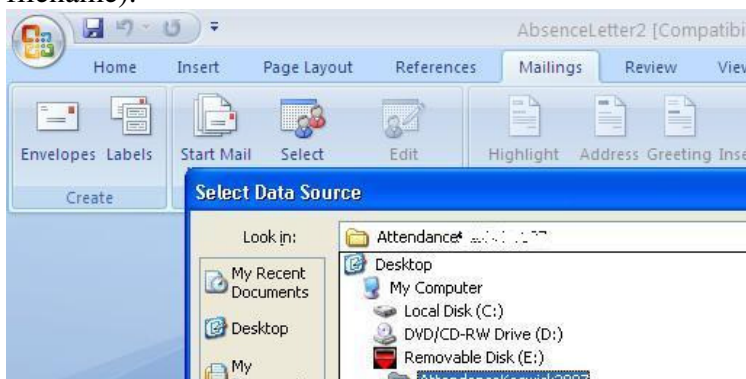
C-4. Now you want to connect with a new data source (AbsenceLetter2MailMergeQuery), so click on 'Select Recipients', Use Existing List...



C-5. You will then find the correct Data Source by using the Select Data Source window – Click on the drop down arrow to the right of Look in: My Data Sources.



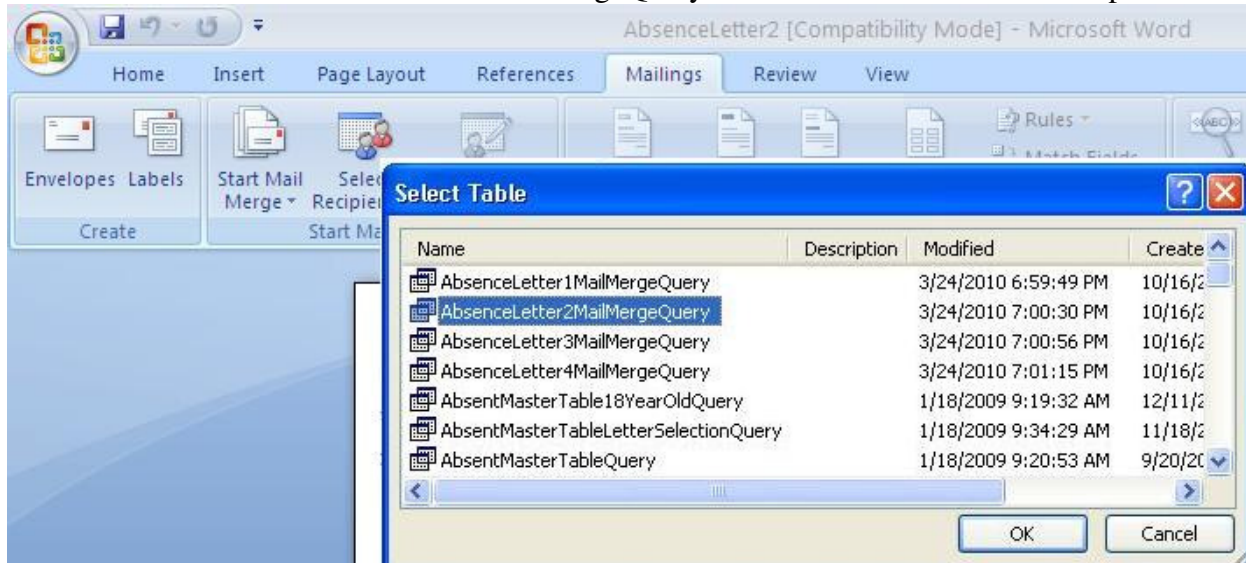
C-6. Then Browse to the folder which contains the Attendance_v130183_ABCD.mde file (similar filename).



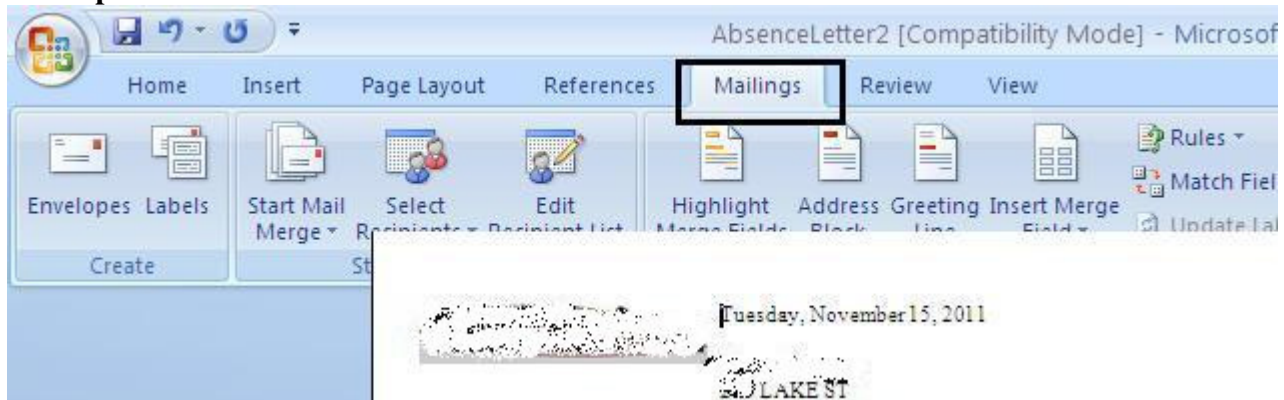
C-7. Browse to find file (continued). Double-click on Attendance_v130183_ABCD.mde file (similar filename)



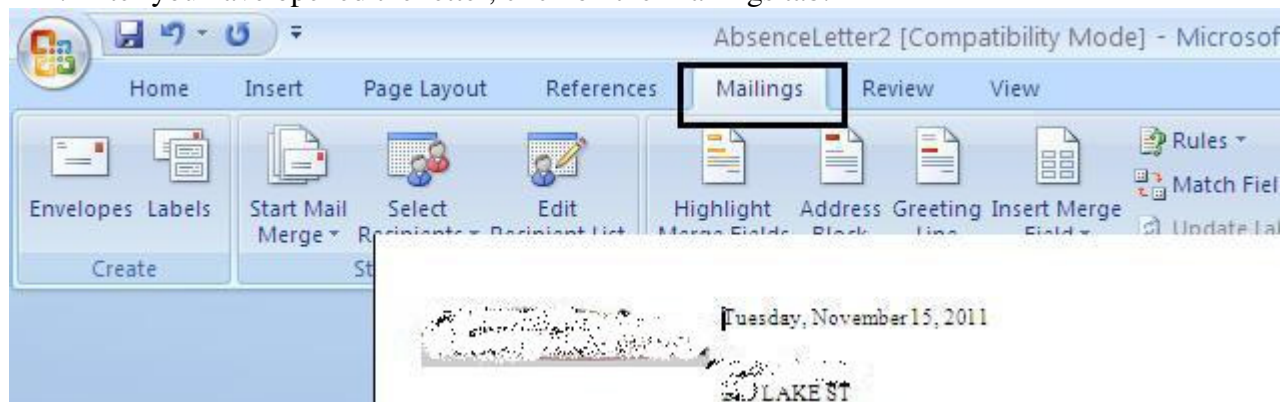
C-8. Then Select the AbsenceLetter2MailMergeQuery – OK. The document should open in MS Word.



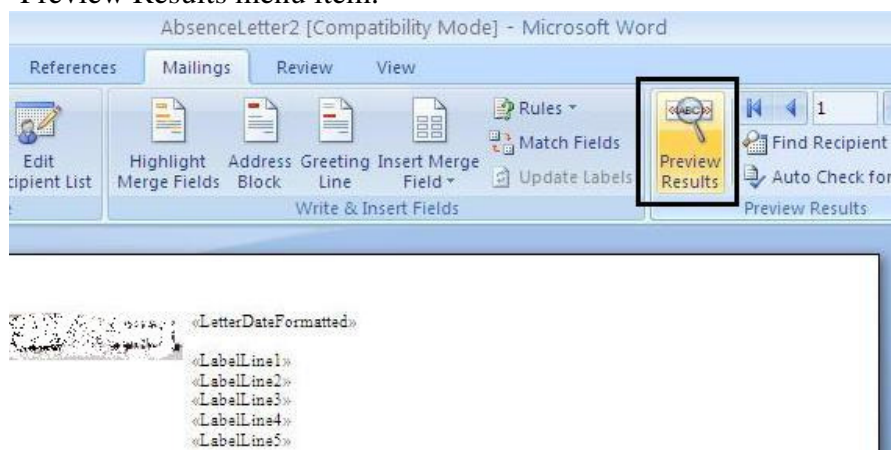
C-9. When the letter displays in MS Word, browse/preview the letter by performing the steps in **D** below. To edit/change the letter, perform the steps in **E** below. Then to generate letters perform the steps in **F** below.



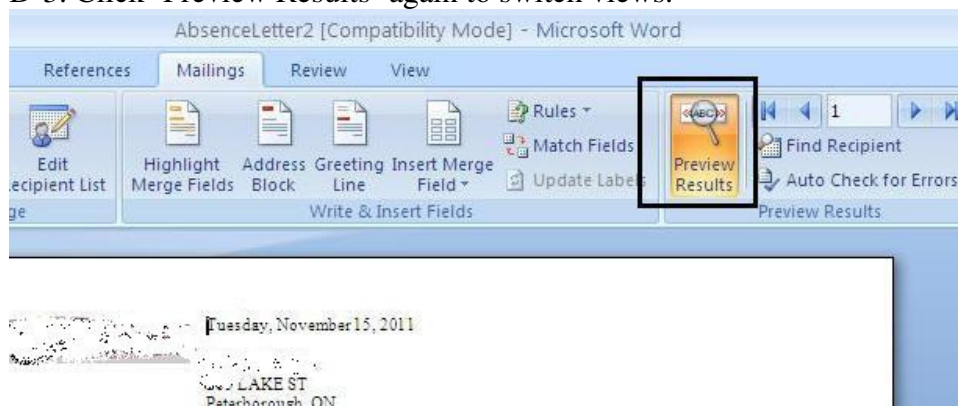
D-1. After you have opened the letter, click on the Mailings tab.



D-2. **Preview Results** icon. The Preview Results icon is a 'toggle' which will allow you to switch between viewing student names etc. and viewing the special control codes (eg. <<LabelLine1>>) within the letter which link to the Attendance Assistant application. To switch views, click on the 'Preview Results' menu item.

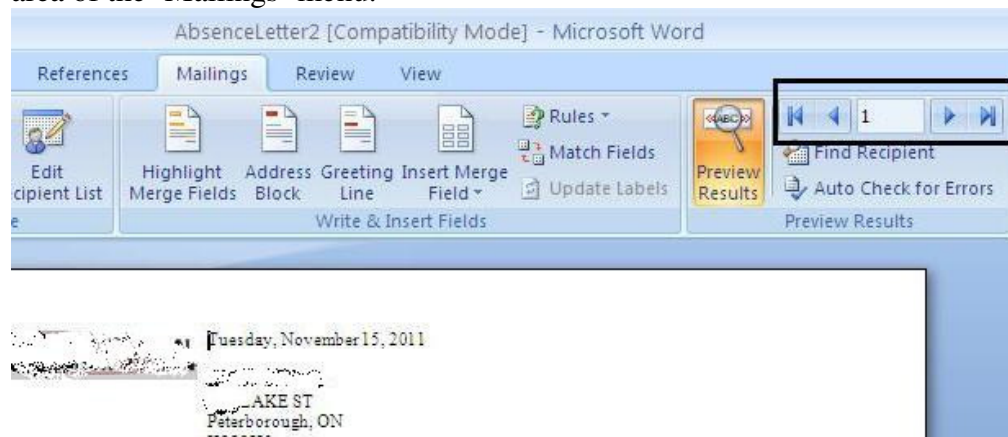


D-3. Click 'Preview Results' again to switch views.



D-4. Click on Preview Results so that you are viewing student names rather than control codes.

D-5. To Advance through the various students, click on the Forward, Back buttons in the right-hand area of the 'Mailings' menu.



D-6. Browse through the letters using the Forward, Back, First Record, Last Record buttons. Be sure that the correct students are displayed. Be sure the correct number of students are displayed.

D-7. To edit/change the letter, perform the steps in E below. Then to generate letters perform the steps in F below.

Generally you would be supplied with a ‘template’ AbsenceLetter1.doc. The version supplied is reasonably straightforward. Many schools use a similar letter. But it is likely that you will want to change the wording of the AbsenceLetter1.doc.

Note that the letter contains some fields that contain data (names, addresses, course codes etc.) that come from the Attendance Assistant application via the AbsenceLetter1MailMergeQuery.

When you edit the letter, be careful not to remove these special fields.

I recommend switching to the view (use ‘Preview Results’ icon) that displays the special codes ie. <<LabelLine1>> etc. so that you do not mistakenly remove the special codes from the letter. Make the appropriate changes to the letter. Save the AbsenceLetter1.doc.



«LetterDateFormatted»¶
 ¶
 «LabelLine1»¶
 «LabelLine2»¶
 «LabelLine3»¶
 «LabelLine4»¶
 «LabelLine5»¶
 ¶
 Dear·Parent/Guardian:¶
 ¶
 Re:·«StudentFirstName»·«StudentLastName»¶



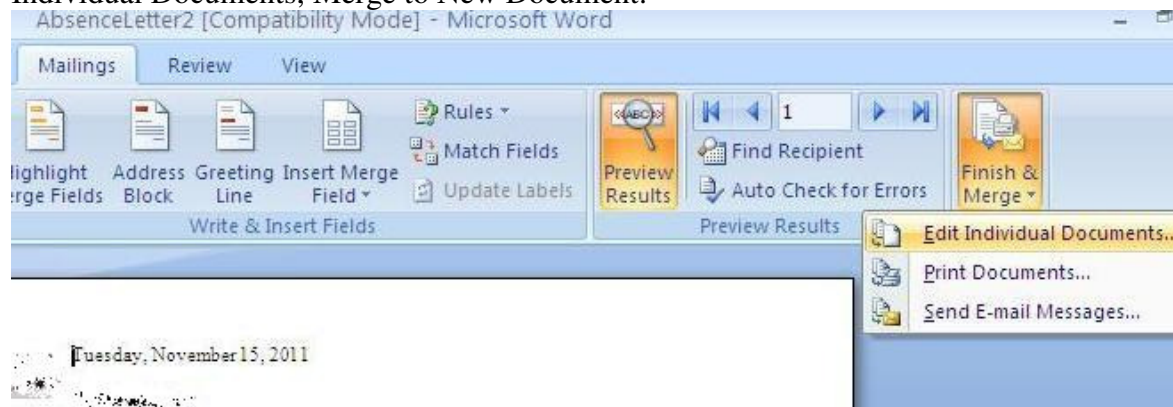
October·11,·2013¶
 ¶
 Tristan·Armstrong¶
 4283·McDonnell·St.¶
 Peterborough,·ON¶
 K9J·1W3¶
 ¶
 Dear·Parent/Guardian:¶
 ¶
 Re:·Dave·Armstrong¶

After you have edited and saved the letter, **to generate letters perform the steps in F below.**

Instructions F – Performing a Mail Merge Generating the Individual Mail Merge Attendance Letters

Page 12

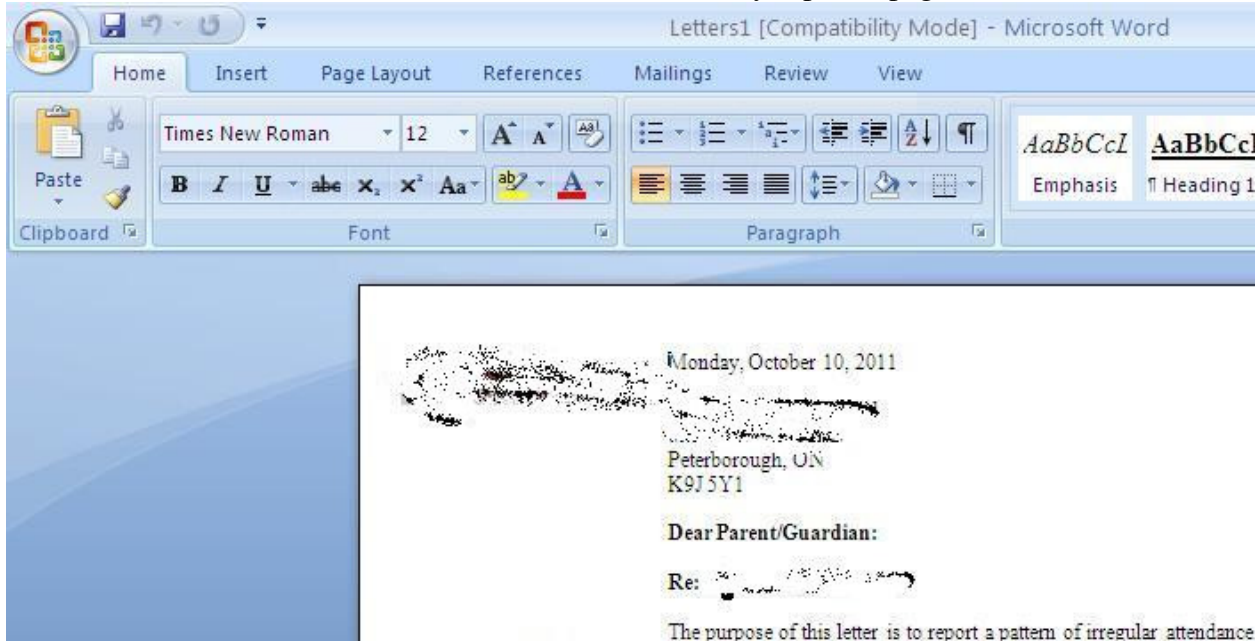
F-1. To create the Mail Merge Document, within the Mailings tab, select Finish and Merge, Edit Individual Documents, Merge to New Document.



F-2 When the Merge To New Document Dialog box appears, Select All – OK. This will then include all records in the new Mail Merge document.



F-3. You should then see a new document which has many separate pages – one for each student.



F-4. Note that MS Word has named this new document Letters1.doc. It is merely a coincidence that it is called Letters1.doc. Scroll through the Letters1.doc and see that it consists of a separate page for each student.

You can now print these letters.

You can optionally save the Letters1.doc for your records. Perhaps name the file AttendanceLettersSentOct10.doc or similar.

End of Mail Merge Instructions
Revised – Nov. 2013