



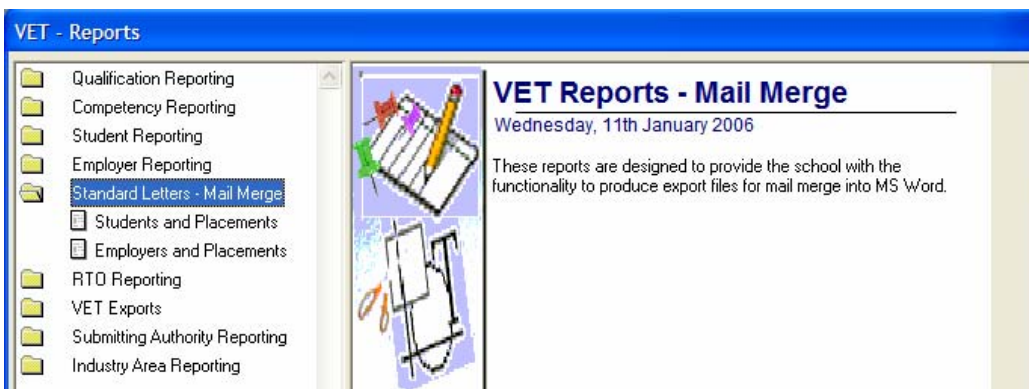
11.6 Standard Letters – Mail Merge

VET > Reports > Standard Letters – Mail Merge

Note: this folder consists of two reports in Western Australia and an extra two in the Northern Territory.

These reports enable the school to produce export files into MS Word.

WA Display:



NT Display:

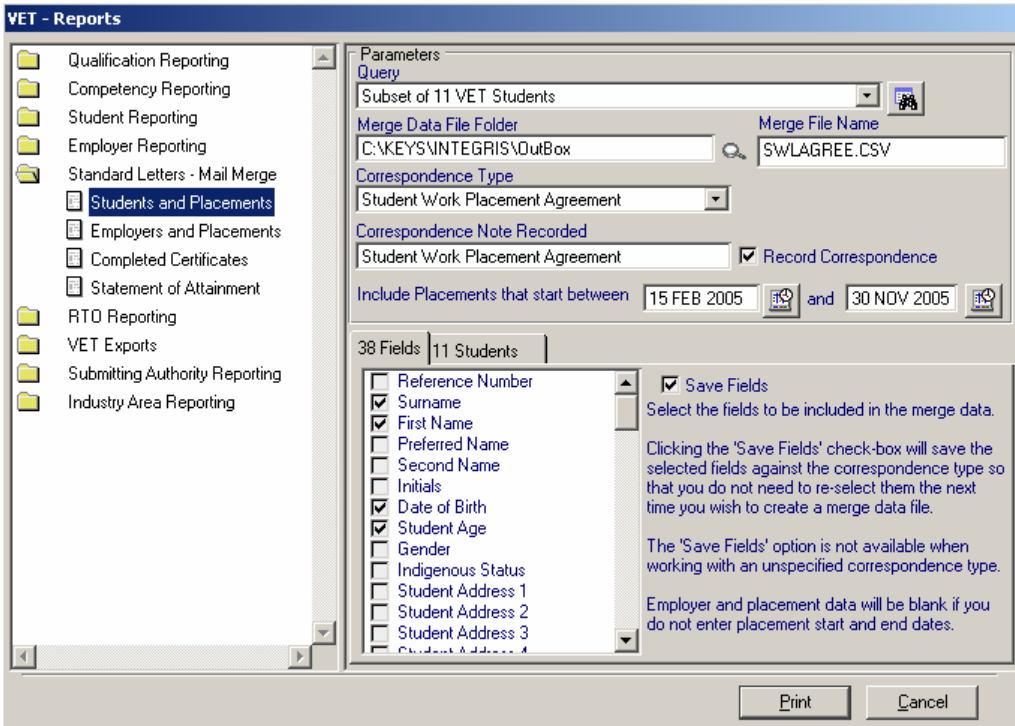




11.6.1 Students and Placements

VET > Reports > Standard Letters – Mail Merge > Students and Placements

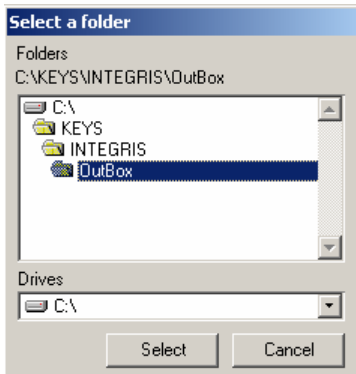
Note: this functionality can only be used if placement for selected students has been completed.



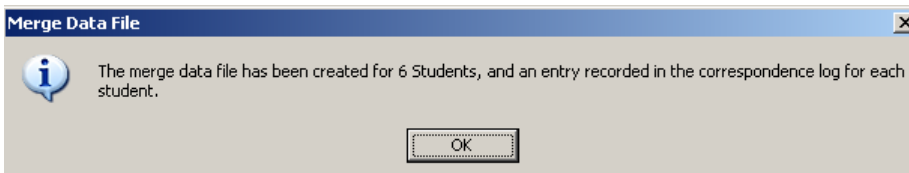
- Use the **Find Student** tool to select student(s) whose data you will use in mail merging. Their names and the number selected will be displayed in the Students tab pane at the bottom of the window.
- Click the **Students** tab to view the list of students, as shown below.

Surname	First Name	Year Group	Form
Naidoo	Esslyn	12	12M HEc2
Smith	Lionel	12	12M HEc2
Lennon	Jack	12	12M HEc2
Barnes	Elizabeth	12	12M HEc2
Barlow	Jessica	12	12M HEc2
Coster	James	12	12M HEc2
Kelsey	Sara	12	12M HEc2
Dale	Damien	12	12M HEc2
Gani	Aldi	12	12M HEc2
Martelli	Kylie	12	12L Art1
Mires	Emma	12	12L Art1
Sassella-Otley	Amy	12	12L Art1

- Click the spyglass on the right of the **Merge Data File Folder** field.
- Locate and select a folder in which to save the file of student data to be used in mail merging, shown below.



- Click **Select**. The folder path is displayed in the Merge Data File Folder field.
- In the Correspondence Type field, select a correspondence type or leave it 'unspecified'. If a type is specified, default mail merge fields will be selected. You will be able to add/remove fields in the default list and save the selection for the correspondence type. The next time you create a mail merge file with the same correspondence type, the fields will be selected by default.
- A default merge file name is displayed. Edit the file name if required.
- Tick Record Correspondence if you wish to record today's date and the Correspondence Note in each of the selected students' Correspondence Log. To make a different correspondence note in students' records, edit the text. Up to 100 characters can be entered.
- Enter the dates between which the placements occurred. The report will select all the placement records that fall on or between the dates entered.
- In the **Fields** tab pane at the bottom of the window, tick the checkboxes against all fields to be included in the mail merge file
- Click **Print**, and you will see a message similar to that below.

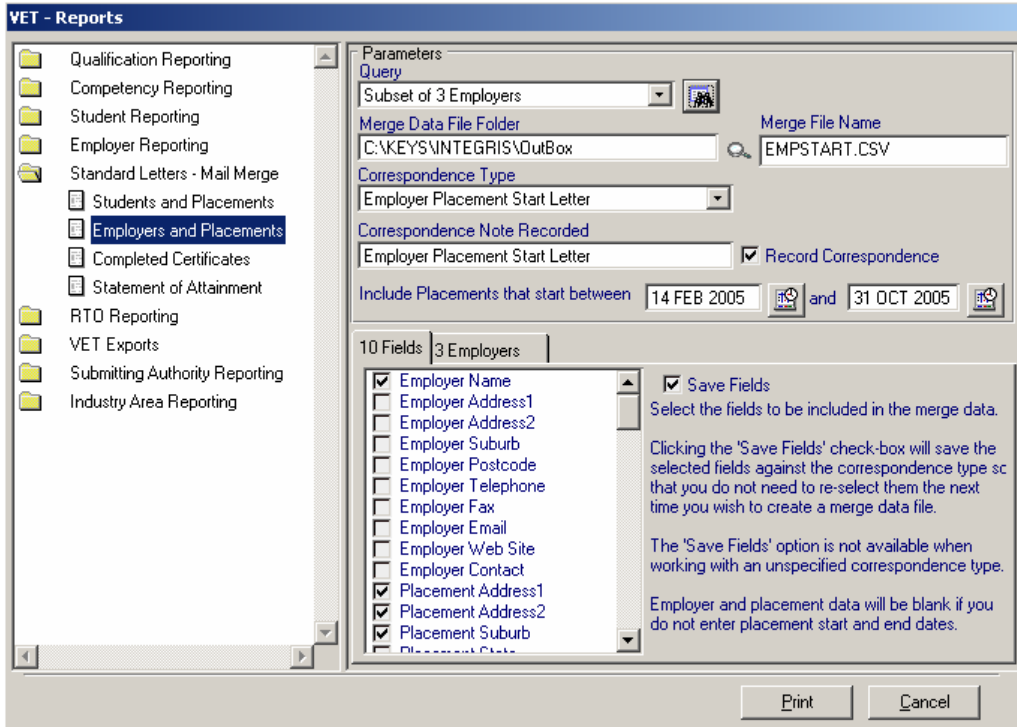



- Click **OK**. The file is created in CSV (comma separated values) format and saved in the Merge Data File Folder. The first record in the file will be a description of each field extracted. This file can form the data source for a Word mail merge document.



11.6.2 Employers and Placements

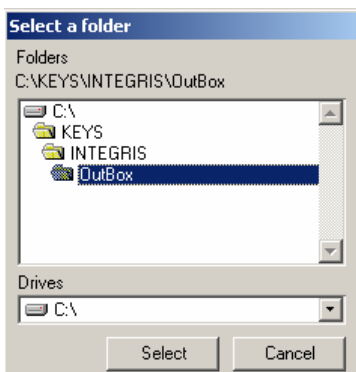
VET > Reports > Standard Letters – Mail Merge > Employers and Placements



- Use the **Find Employer** tool  to select employer(s) whose data you will use in mail merging. Their names and the number selected will be displayed in the Employers tab pane at the bottom of the window.
- Click the **Employers** tab to view the list of students, as shown below.

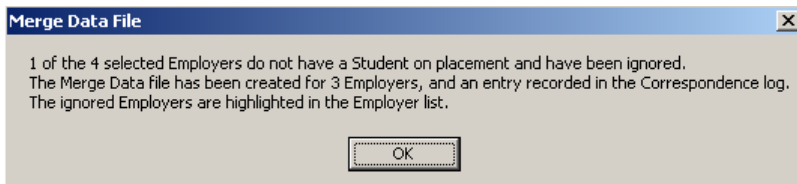
Name	Suburb	Active
Circles for Nails	Booragoon	YES
Clancys Fish Pub	Fremantle	YES
DBR Electrical Contractors	Queens Park	YES
Dale Baker	Willetton	YES

- Click the spyglass on the right of the Merge Data File Folder field.
- Locate and select a folder in which to save the file of employer data to be used in mail merging, like below.





- Click **Select**. The folder path is displayed in the Merge Data File Folder field.
- In the Correspondence Type field, select a correspondence type or leave it 'unspecified'. If a type is specified, default mail merge fields will be selected. You will be able to add/remove fields in the default list and save the selection for the correspondence type. The next time you create a mail merge file with the same correspondence type, the fields will be selected by default.
- A default merge file name is displayed.
- Edit the file name if required.
- Tick Record Correspondence if you wish to record today's date and the Correspondence Note in each of the selected employers' Correspondence Log. To make a different correspondence note in employers' records, edit the text. Up to 100 characters can be entered.
- Enter the date range for the data to be selected for mail merging. The report will select all placement records where the placement dates fall on or between the dates entered.
- In the **Fields** tab pane at the bottom of the window, tick the checkboxes against all fields to be included in the mail merge file.
- If you have selected a correspondence type and you wish to save the selected fields for that type, click the **Save Fields** checkbox. If you have not selected a correspondence type, the **Save Fields** checkbox will not be active.
- Click **Print**, and you will see a message similar to that below.



- Click **OK**. The file is created in CSV (comma separated values) format and saved in the folder selected in the Merge Data File Folder. The first record in the file will be a description of each field extracted. This file can form the data source for a Word mail merge document.

FACT SHEET

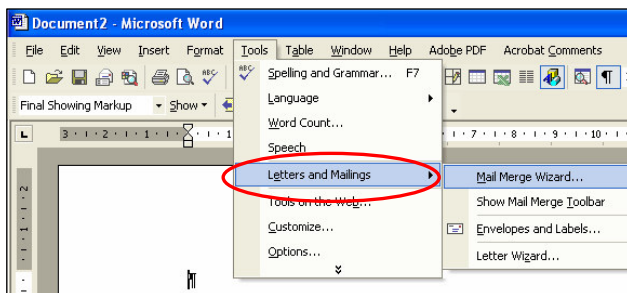
Merging Integris Export CSV File into Microsoft Word



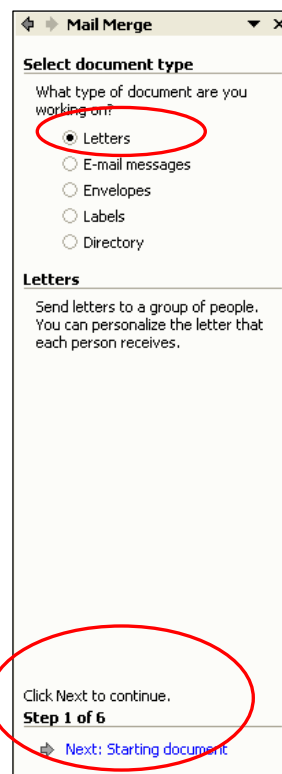
INTRODUCTION

A CSV (Comma Separated Value) export file can be created from data contained in Integris. This data can then be used to create letters or other documents such as address labels in Microsoft Word.

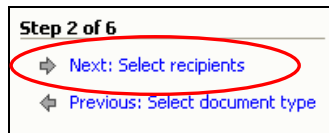
1. Create and save a CSV export file to be used as the data source for the mail merge.
(Note: Refer to Fact Sheet - *Creating a CSV Export File for Mail Merge* for instructions.)
2. Open Microsoft Word and set up the body of the letter as required. If you have previously created and saved a mail merge template using this method, the existing document can be used.



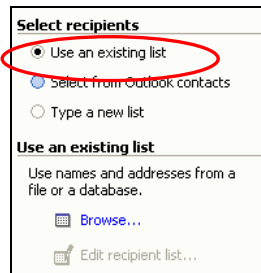
3. **Tools >Letters and Mailings >Mail Merge Wizard**
Located in the MS Word menu bar.
4. **Select document type >Letters** from the Mail Merge Wizard side pane.
5. On the Mail Merge Wizard side pane Click **Step 1 of 6 Next: Starting document** to continue.



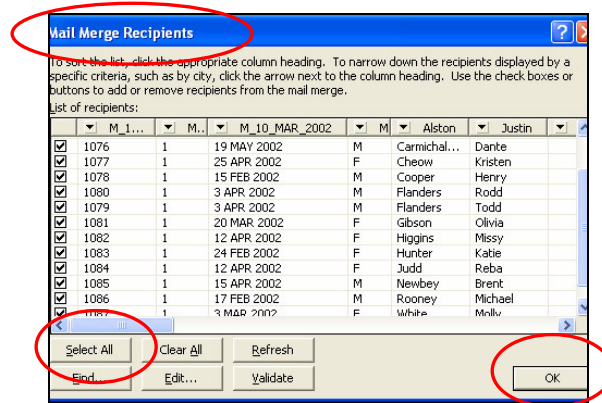
6. On the Mail Merge Wizard side pane Click **Step 2 of 6 Next: Select recipients** to continue.



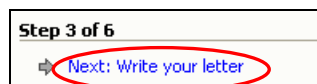
7. Choose **Use an existing list**. Then click on **“Browse”** to locate the Integris CSV file. (Previously created CSV file as per Step 1 of this document.)



8. In the Mail Merge Recipients window click **Select All** then click **OK**.

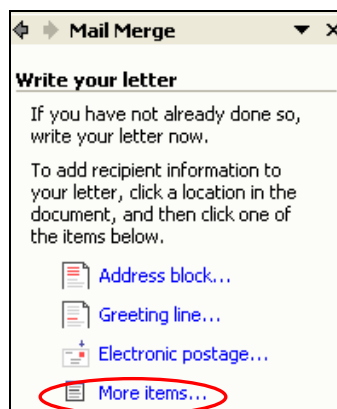


9. On the Mail Merge Wizard side pane Click **Step 3 of 6 Next: Write your letter**.

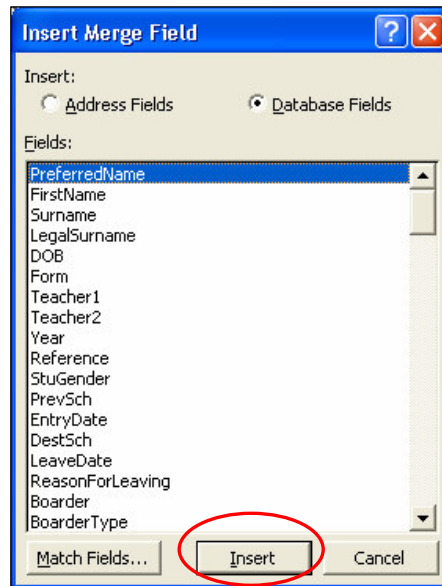


10. Place the cursor in the Word document where the first merge field is to be placed.

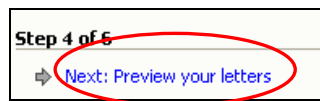
11. In the Mail Merge Wizard side pane select **“More Items”**.



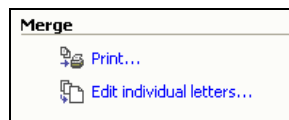
- The ***Insert Merge Field*** window will display which includes the merge fields generated by Integris.



12. Click on the merge field required then click **Insert**. Repeat for all merge fields required.
13. On the Mail Merge Wizard side pane **Step 4 of 6** click **Next: Preview your letters**.



14. On the Mail Merge Wizard side pane **Step 5 of 6** click **Next: Complete the merge**. Click on **Print** or go back to **Edit individual letters**.



15. Mail Merge Wizard **Step 6 of 6** allows you to go back and preview your mail merge document.

