

Instructions for Sending files from CARS to Word Mail Merge

The Procedure

The procedure for using CARS information in a Word document consists of three processes.

1. Creating a wpreport and a letter. These are run through the CARS Letters/Labels process using rtf as the output type. The result is a document created in the WordProcessing Merge drawer that is a Word document type.
2. Ftping the merge file from admin.stedwards.edu to the hard drive of your computer.
3. Setting up and executing a Word Mail Merge to create personalized letters, envelopes or labels. The file ftped from CARS is used as the data file in the Word mail merge.

Creating the Merge File in CARS

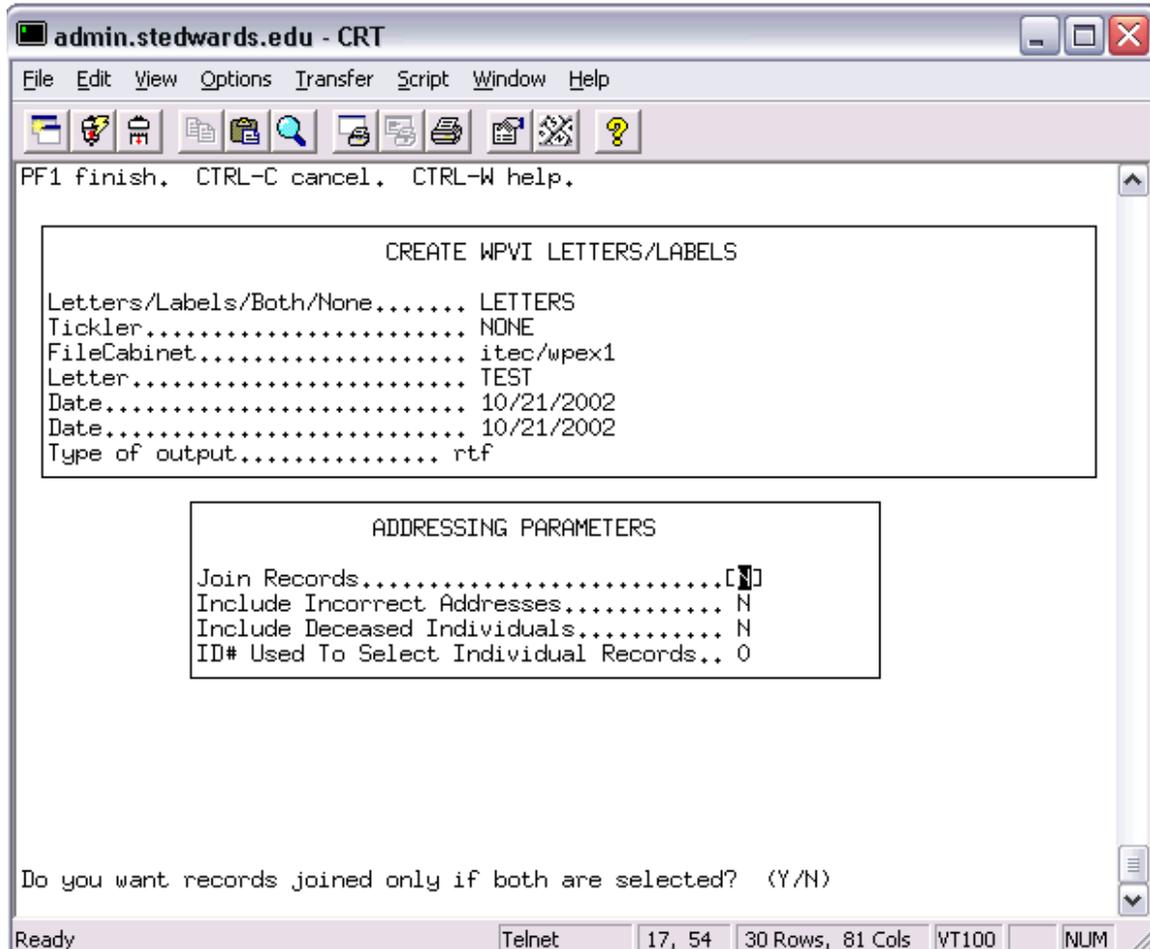
1. Open **Word Processing** by logging into CARS and pressing **W**.
2. Open your **File Cabinet** and then open the **wpreports** drawer. You must place your wpreport and letter in a department file cabinet. This process will not work out of the private file cabinet.
3. Create a normal wpreport just as you would for letters or labels. You can add WP Macros to your report to pass additional fields of information to the mail merge document. There is a sample report included on page 11 of this documentation.
4. **Save and translate** the report.
5. Open your **Letters** drawer.
6. Create a letter that has for contents only: **WP_END**
7. **Save and translate** the letter.
8. If you do not already have a **Merge** drawer, create a new one by going to your File Cabinet and selecting **n** to create a new drawer. Name the drawer **Merge**.

```
----- File Cabinet: itec -----
o - open          r - rename          b - back screen      C - Close File Cabinet
n - new           d - delete          f - forward screen   X - Exit Word Processing
----- Drawer Names -----
  1. Merge
  2. letters
  3. reports
  4. wastebasket
  5. wpreports

Enter Command: n
Enter name of drawer to be created: Merge
```

9. Exit from Word Processing.
10. Go to the **Utilities Menu** and select **Create WPVI Letters/Labels**

11. Enter Letters for the type, enter your wpreport name, letter name, etc.



12. Choose **rtf** for **Type of output**.

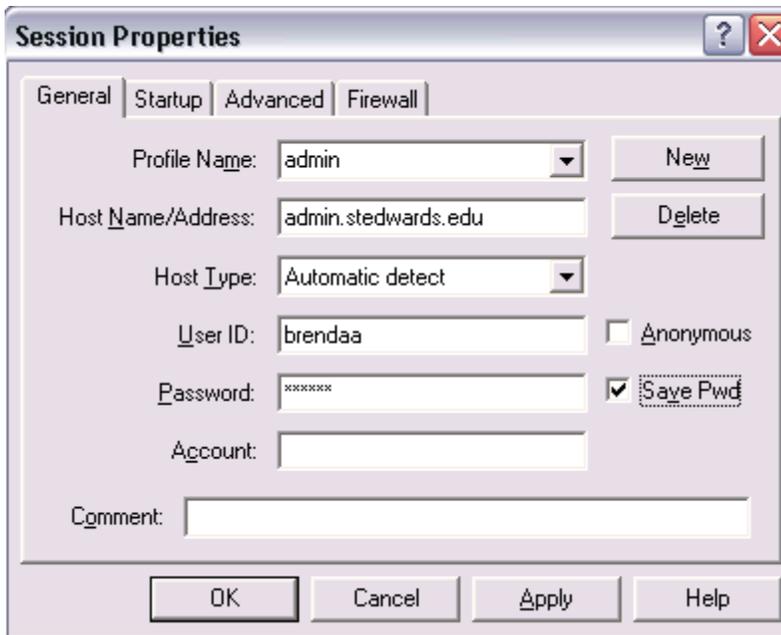
13. Select the Addressing Parameters and Label Parameters.

14. Select **Now** for the time and Background equals **Y**.

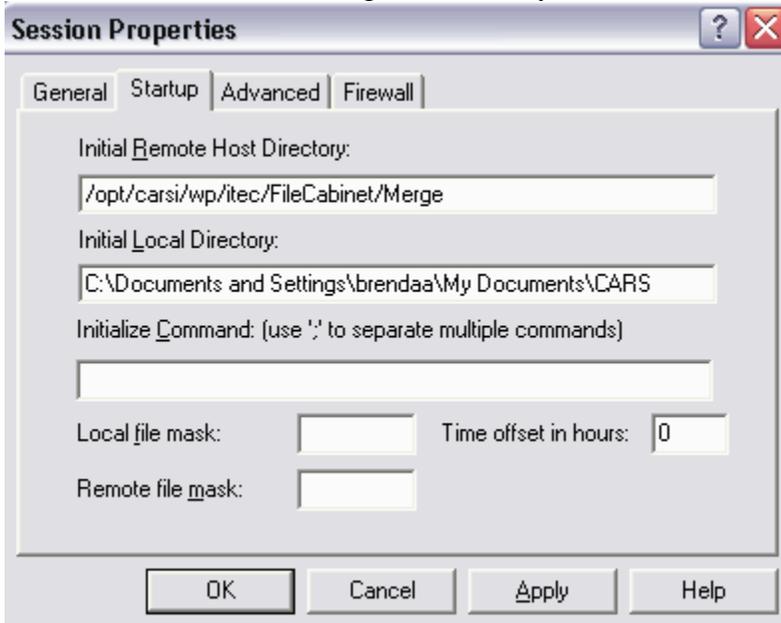
15. When the Letters/Labels process has finished running you will receive email. If you do not receive any error messages, your file completed successfully. Check the **Merge** drawer to make sure a file was created. It should be named **Lettername.doc**.

Ftping The File To Your Computer's Hard Drive

1. **FTP** the document from /opt/carsi/wp/FileCabinetName/FileCabinet/merge to your **My Documents** folder on your local computer's hard drive. To ftp your file use the application **WS_FTP**.
2. The first time you do this you will need to create a new **Profile** by clicking on the **New** button..
 - Name the profile **admin**.
 - The host will be **admin.stedwards.edu**.
 - Enter the same **login name** and **password** used for CARS.

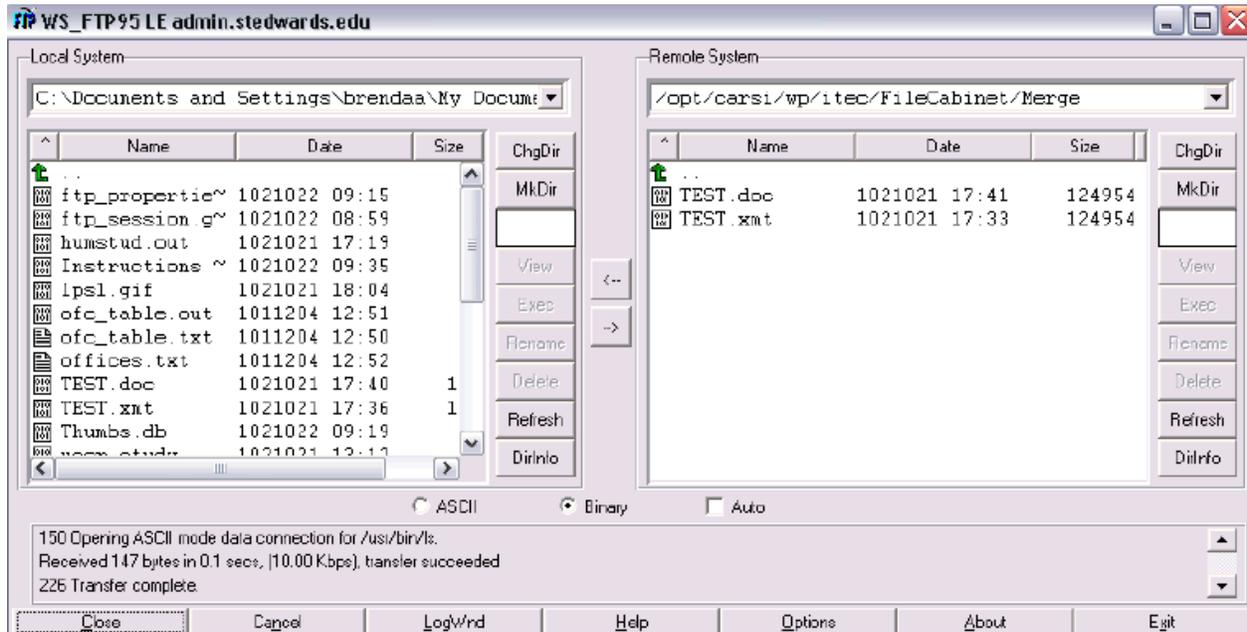


3. Click on **Apply**.
4. If you are going to be doing this on a regular basis you can save some time by setting up the default remote (admin.stedwards.edu) directory and the default local (your computer) directory. Click on the **Startup** tab at the top of the screen.
5. Enter the path to the Merge directory. This will take the form /opt/carsi/wp/filecabinetname/FileCabinet/Merge. For example, the Merge drawer in the file cabinet itec would be reached with this directory path: /opt/carsi/wp/itec/FileCabinet/Merge
6. Enter the directory on your local computer from which you want to perform the Mail Merge in Word. For example, the path to My Documents/CARS in Windows XP would be C:\Documents and Settings\brendaa\My Documents\CARS



7. Click on **Apply** to save the settings and apply the directory structure to you ftp session.

8. To connect to admin.stedwards.edu, click on **Ok**.
9. The connection window will appear as below.



10. To move a file from the Remote System to the Local System, click on the file one time to select it. Then click on the **left pointing arrow** between the Remote and Local system display. The file will be copied to your local hard drive and to the folder that appears at the top of the window.
11. When the file has transferred, click on **Exit** to close WS_FTP.

Merging the File with a Word Document to Create Personalized Letters in Word 2000

The Main Document and Data Source

The **main document** is also called the merge document. It is the letter or memo you are sending out. It contains a set of field codes inserted at each position such as the address and salutation for each item of variable information. The **data source** contains the variable information, called a record, with such information as name, address, city, state, and zip code for each person you want to send the letter or memo to.

Creating a Mail Merge Document

To start the mail merge process, choose **Mail Merge** from the **Tools** menu. You will need to perform the following steps to create a mail merged document .

1. Create a Main Document

To create a letter or form select **Form Letters**. Choose to use the active window as your Main Document or create a new file. If you will be using the same letter or form over and over you may save your main document and use it again.

2. Create or Define a Data Source

Your data source will be the document that you created in CARS.. From the menu select **Open Data Source**. Navigate to the folder in which you save your CARS data and click on **Open**.

 Insert Merge Field

3. Edit Main Document

To edit the main document, choose **Tools** menu and then **Mail Merge**. Choose **Edit Main Document**. Type in the text that will be common to each of the letters produced in the mail merge. In each position where variable information should be inserted from your data file, click on the **Insert Merge Field** button. Select the Merge Field you wish to insert from the list. Continue adding text to the merge document. Insert the appropriate field in each position for variable information. You may add any formatting or punctuation to the merge fields.

Example: For an address block, your inserted merge fields will look like this.

«ADDRESSEE»
«ADDRLINE1»
«ADDRLINE2»
«CITY», «STATE» «ZIP»

To setup the salutation, enter the greeting text (Dear) and then click on the **Insert Merge Field** button and select **SALUT** as the field name. This will give you the salutation from CARS according to the joining properties you selected when you ran your wpreport.

Checking the Merge Document



To check the merge document for errors, click on the **Merge** button on the Toolbar. Microsoft Word checks your merge and data documents for possible errors.

4. Executing the Mail Merge



To execute the mail merge and send the merge letters to a file, click on the **Merge to New Document** button. The print merge executes and the merged letters appear in a document in the active window. This file contains each of the merged letters. The merged letters are separated by a section break.

To execute the mail merge and send merge letters directly to a printer, click on the

Merge to Printer  button.

Creating an Envelope Merge

1. Choose the **Tools** menu. Choose **Mail Merge**. Under **Main Document**, click on the **Create** button and select **Envelopes**.
2. Click on the **Active Window** button to use the current document to create an envelope merge.
3. Under **Data Source**, click on **Get Data** and select **Open Data Source** to open an existing database file. Select the file containing the names and addresses for which you wish to have envelopes created.

4. Click on the **Set Up Main Document** button to create an envelope definition.
5. In the **Envelope Options** dialog box select **Printing Options** tab to check the feed method for your envelopes. Make changes as needed and click on **OK**.
6. In the **Envelopes Address Dialog Box**, click on the **Insert Merge Field** button and select the merge fields. Click on **OK** to finish.
7. Click on the **Merge** button to start the merge.

To suppress printing of a return address:

1. Open the envelope file.
2. Go to **Tools** menu and choose **Options** and then **User Info**.
3. Delete Mailing Address.
4. Delete return address from envelope template file.

Merging the File with a Word Document to Create Personalized Letters in Word XP

The Mail Merge Wizard

1. Open a blank document and then select the **Tools** menu and then **Letters and Mailings** and then **Mail Merge Wizard**.
2. The Mail Merge Wizard will appear on the right side of the screen.

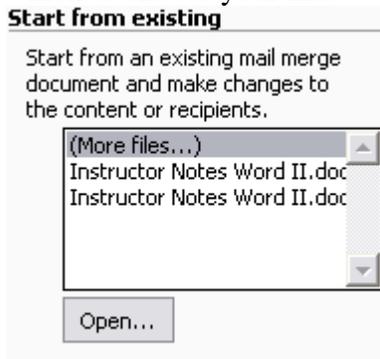


3. If you are creating Letters, accept the default and click on **Next** at the bottom of the Mail Merge Wizard window.

4. If you do not have an existing letter that you want to use, click on **Use the existing Document**. If you have a letter that you wish to use, click on **Start from existing document**.

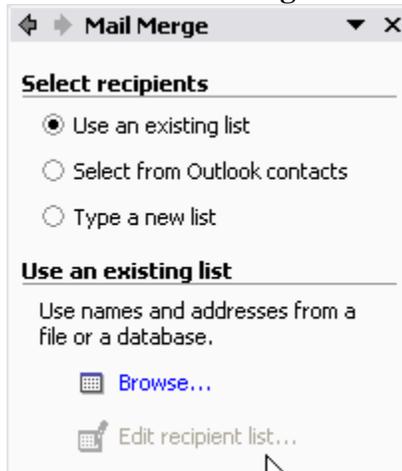


If you choose to start from an existing document, you will receive a new dialog box from which to choose your file.

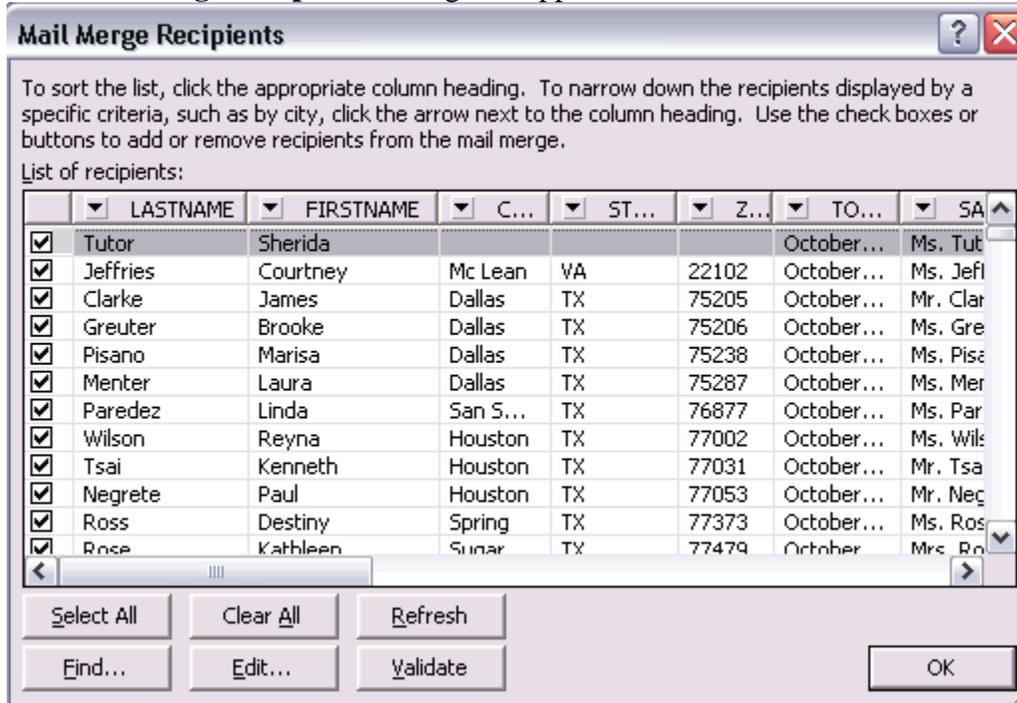


Double-click on **More files...** to open the Word Open Files dialog box. Choose your file and click on **Open**.

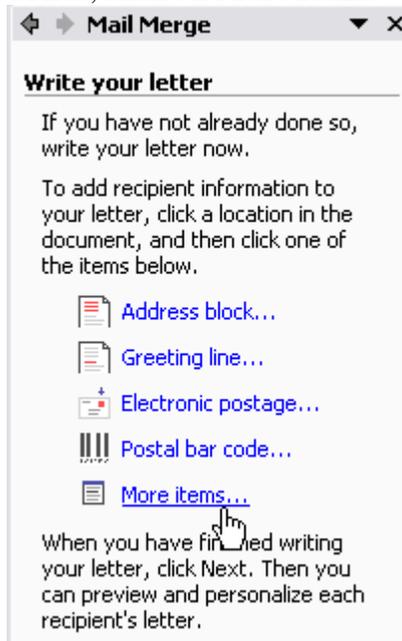
5. Click on **Next – Select Recipients** from the Mail Merge Wizard.
6. Select **Use an existing list** and then click on **Browse**.



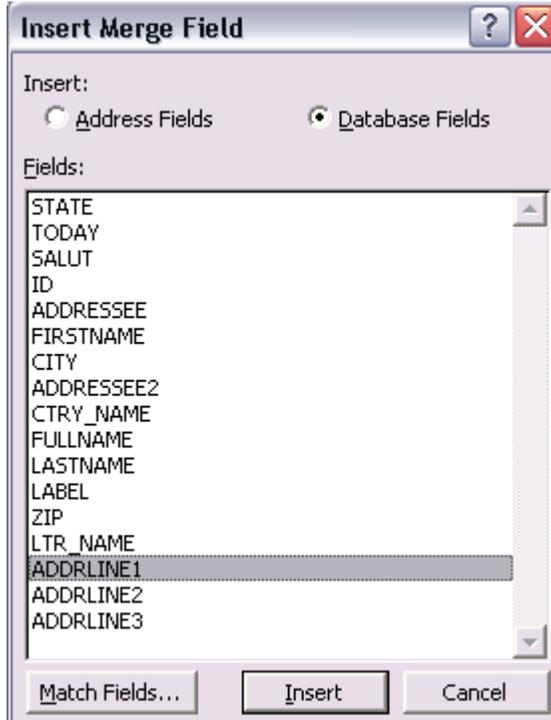
7. The Word Open dialog box appears. Select the file that you created in CARS and click on **Open**.
8. The **Mail Merge Recipients** dialog box appears.



9. By default all records are selected and in zip code order because of the CARS Letters/Labels process, but you can use this dialog box to change the sort order, unselect individual records or edit a record. If you want to select all and make no changes, click on **OK**.
10. Click on **Next: Write Your Letter**.
11. Write the text of your letter. To add specific fields from the data source created in CARS, click on **More Items**.



12. The **Insert Merge Field** dialog box appears. Click on the field you wish to insert and click on **Insert**. Click on **Close**.

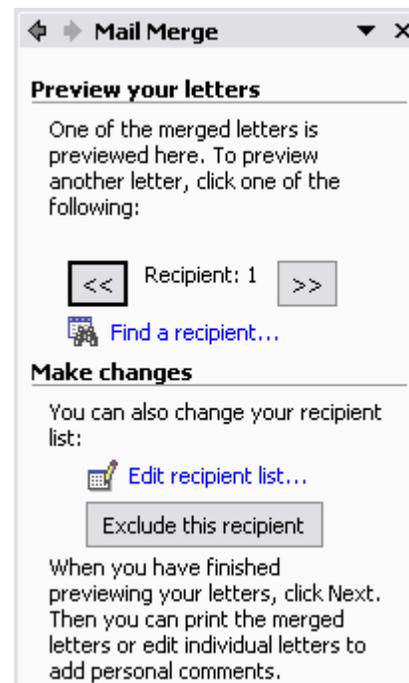


13. If you are creating an Address Block, you will need to repeat this until all Merge Fields have been added. An address block on your letter might look like this.

«ADDRESSEE»
 «ADDRLINE1»
 «ADDRLINE2»
 «CITY», «STATE» «ZIP»

Remember that you still need to add the punctuation, such as the comma between city and state. To setup the salutation, enter the greeting text (Dear) and then click on **More items...** and select **SALUT** as the field name. This will give you the salutation from CARS according to the joining properties you selected when you ran your wpreport.

14. Click on **Next: Preview your letters**. Word will automatically generate a letter for every record in your data source. To look at the letters click on the >> to the right of Recipient: on the Mail Merge Wizard. From this screen of the Mail Merge Wizard you can also find a specific recipient, edit your recipient list, or exclude a recipient
15. If you are ready to print your letters, click on **Next: Complete the merge**.



16. Click on **Print** to see the Mail Merge Print dialog box.



17. You may print 1 record to test the output by selecting **Current record** or **From: 1 To: 2**. Click on **Ok**.

18. Select your printer in the Print dialog box and click and click on **Ok**.

Sample Wpreport

{
This is a sample ace report for creating letters, labels and merge files.
Modify the read and format sections to obtain the desired results.

NOTE: DELETE the SRT_ macros (define and format sections) if you are not using SORTPAGE}

database CARS_DB end

define

 LTB_DEFINE

 SRT_DEFINE

end

output

 WP_OUTPUT

end

```
select  id_rec.id,
        id_rec.fullname,
        alum_rec.cl_yr
  from  id_rec,
        alum_rec
 where  (alum_rec.cl_yr >= 1980)
        and alum_rec.id = id_rec.id
end
```

SRT_SORT_BY(ADR_ZIP_VALUE,ADR_NAME_VALUE,ADR_ID_VALUE)

format

{Example of LTB_FORMAT_ macro usage:

```
          ADR                          ID    NAME
          RUN CODE  File Cabinet  field  field
          -----  -----          -----  -----
```

}

 LTB_FORMAT("JOINT", "development", id, fullname,)

{

Enter all WP_MAC_ lines needed for letters after LTB_FORMAT_ and before

LTB_FORMAT_END_.

Examples of WP_MAC_ lines:

MACRO NAME	FIELD NAME	Numeric fields 'using' clause	NC - Not clipped (Numeric & Date
WP_MAC(WP_PLDG_AMT,	pldg_payprd)		
WP_MAC(WP_CLASS_YEAR,	alum_cl_yr	using "####",	NC)

NOTE: Do not modify the LTB_FORMAT_END_ parameters. They are used when
using contacts to update them to Completed.}

LTB_FORMAT_END(N,N)

LTB_LAST_REC

end

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Creating a Word Mail Merge File from CARS Data