

MICROSOFT EXCEL MERGE GUIDE

Introduction

This document provides students with some basic information about using an Excel list for typical job-hunting activity, such as (i) mailing application letters and packages with Word's mail merge capability; and (ii) providing Excel lists to recommenders who may also need to mail merge letters.

As a "getting started" guide, this document provides an overview. It assumes that you have a baseline computer proficiency in dealing with files and folders, and with use of Microsoft Word & Excel. For two topics, form letters and labels/envelopes using Word's mail merge capability, it provides you the specific instructions in Microsoft Word for two scenarios: starting with a blank document, or starting with a document supplied by the Career Development Office that has the mail merge fields previously inserted. However, for other typical list use it refers you to the software Help features for additional details.

If these instructions do not reflect the ones from the Microsoft Word version you are currently using, this document will be less useful to you, but not completely useless. In that case, we suggest you review this document for a conceptual overview, and then reference Word's "Help" feature for the version you are using.

At the end of this document are suggestions if you need more information and additional help.

Overview of Steps for Using a Career Development Excel List

Starting from the Career Development web site, below are the typical steps for using an Excel list and "starter" letter provided by Career Development.

- (i) Download the Excel .xls file containing the list that you want to use.
- (ii) Download the "starter" letter .doc file.
- (iii) When prompted "Do you want to open or save this file?", choose "Save" and save both items with new file names.
- (iv) Personalize the Excel list by selecting the names to which you want to mail a letter or package (see "Making Subsets from Our List" topic below), and then save the personalized Excel file to a new file name.
- (v) Open the "starter" letter so that you can personalize it with your information.
- (vi) The user is now ready to perform the mail merge for form letters.

Step (vii) is discussed in more detail under the topic "Form Letters" below.

Making Subsets from Our List

Often you will want to extract from our Excel list a limited number of “records” for your use. For example, we may provide a list of all Federal District Court judges, but you may want to extract the 5th Circuit district court judges to mail clerkship application packages only to those judges. In computer talk, this operation is called a “query.”


With our list there are at least two ways to do this. First, you could copy the Excel file. Then, sort the spreadsheet rows in the copy using Excel’s Data→Sort... capability. Next, simply delete all the unwanted rows. With the 5th Circuit example, the original Excel file perhaps had several thousand rows, but after you sort and delete, you may be left with only about a hundred 5th Circuit district court judges.

The second way is to leave all the rows in the Excel file, and “query” the rows you want at the mail merge stage. This is an advantage for those unfamiliar with Excel, but otherwise is an equivalent way to achieve the same result – as long as you do not need to provide a personalized Excel list to a recommender (used when applying for post-graduate judicial clerkships), in which case you cannot use this method.


Form Letters

Both of the techniques below will merge all of the data in the Excel list.

Form Letters with a Career Development “starter” letter

1. Open the downloaded “starter” letter Word document.
2. From the **Tools** menu, select **Letters and Mailings**. Make sure that the **Show Mail Merge Toolbar** option is checked. The mail merge toolbar should now be visible. Go back to the **Tools** menu, select **Letters and Mailings** again, and then **Mail Merge Wizard**.
3. The **Mail Merge Wizard** is now visible. Select **Letters** and then **Next**.
4. Select **Use the Current Document** and then **Next**.
5. Select **Use an Existing List** under **Select Recipients**, and then click on **Browse**.
6. Now you need to find the data source. Once in the **Select Data Source** window, use the drop down menu labeled **Look In** to locate your “subsetted” Excel document. Make sure that you select **Excel Files** under the **Files of Type** drop down menu. Once the file is located, click on **Open**, then **OK** at the next dialogue box.
7. Your document now shows the fields that will be merged from the Excel file.
8. To complete the merge process, click on the  **Merge to New Document** icon. Next, make sure **All** is selected and click **OK**.
9. You now have two documents: the “starter” letter and the new merged document. Please save each respective document.


Form Letters from a blank document

1. Create the static part of the form letter – the part that doesn't change from data record to record. Once you have completed the letter, save it.
2. From the **Tools** menu, select **Letters and Mailings**. Make sure that the **Show Mail Merge Toolbar** option is checked. The mail merge tool bar should now be visible. Go back to the **Tools** menu, select **Letters and Mailings** and then **Mail Merge Wizard**.
3. The **Mail Merge Wizard** is now visible. Select **Letters** and then **Next**.
4. Select **Use the Current Document** and select **Next**.
5. Select **Use an Existing List** under **Select Recipients**, and then click on **Browse**.
6. Now you need to find the data source. Once in the **Select Data Source** window, use the drop down menu labeled **Look In** to locate your “subsetting” Excel document. Make sure that you select **Excel Files** under the **Files of Type** drop down menu. Once the file is located, click on **Open**, then **OK** at the next dialog box.
7. You now can insert the fields into your document. Place your cursor in the document where you want to insert a field. Once the cursor is in position, click on the  **Insert Merge Field** icon in the mail merge toolbar, and select the desired field. The field you selected will place the data in the document. Continue this process until all desired fields are positioned the way you want them in the document.
8. To scroll between the records, click on the left or right navigation arrows located under the **Preview your Letters** section. Click **Next** at the bottom to complete the merge.
9. Click **Edit the Individual Letters**, make sure **All** is selected when the **Merge to New Documents** box appears, and click **OK**.
10. You now have two documents: the original letter and the new merged document. Please save each respective document.

Other Uses of Mail Merge

Labels and Envelopes

1. Open a blank document.
2. Make sure that the **Mail Merge Wizard** is now visible. Select **Labels** or **Envelopes** and then **Next**.
3. Make sure that **Change Document Layout** is selected under the **Select starting document** section, and click on **Label** or **Envelope Options**.

4. Select the label or envelope type and size, click **OK**, and click on **Next**.
5. To connect to the data source Excel list, follow the general format described in steps **5** thru **7** of the **Form Letters from a blank document** section. Click on **Next**.
6. The **Arrange your labels** or **Arrange your envelopes** section gives you the option to explore other ways to format your labels or envelopes. Click on **Next** to preview your labels/envelopes.
7. To scroll between the records, click on the left or right navigation arrows located under the **Preview you labels** or **Preview your envelopes** section. Click **Next** at the bottom to complete the merge.
8. To complete the merge process, click on the  **Merge to New Document** icon. Next, make sure **All** is selected and click **OK**.
9. The merge is now complete. Please save your documents.

For more information . . .

The staff in Career Development is always happy to answer your questions and provide assistance to the extent possible. Please realize, however, that we are not information technology specialists and if you have a unique requirement for use of the Excel list we may need to refer you to other sources.

We recommend that users of the Excel list review the basics of Microsoft Word's mail merge capabilities. If you need assistance, go to the **Help** menu in Word and type in "mail merge". You will find a wealth of information on how to use the mail merge feature that will hopefully answer any questions or solve any issues you may have.