



Scholastic ONline Information System  
for the Web

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# Mail, E-Mail Merge, and Mailing Labels

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Mail merge is an ideal way to create attractive letters, brochures and mailing labels to send to your constituents. This text guides users of mail merge using such word processing packages as Microsoft® Word, WordPerfect®, OpenOffice™ Writer, and Lotus® WordPro™. Some packages also support sending the mail as e-mail via the World Wide Web. Examples of that process are included. The user needs a copy of the word processing manual and experience in mail merge to understand this document.

If you wish to send letters or e-mail notes based on **timed activities**, see the SONISWEB® text “Timed Letters, Timed E-Mail & Timed Mail-Merge”.

See “Mail Merge Process Summary” on page 31 for an introduction.

June 2006

*Systems, Inc.*

The logo for RJM Systems, Inc. It features the letters 'R', 'J', and 'M' in a stylized, blue, serif font, stacked vertically. To the right of the 'M' is the text 'Systems, Inc.' in a blue, italicized, serif font.

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## NEW IN THIS EDITION

### June 2006 Enhancements

- The use of a blank Program selection as described in the text following Figure 11 “Mailing Labels (RB) Selections”, page 12.

### March 2006 Initial Release

- This edition is for SONISWEB® version 2.0.
- Figure 1 Toolbar for those with User-ID access and Figure 2 Function Lists1 - Partial, page 4.
- Figure 39 Login Displays and Figure 40 Typical SONISWEB® Page, page 33.
- Most of the reports have been rewritten in the Cold Fusion™ Report Builder. Those have “(RB)” following their names as seen in Figure 2. The older Crystal Reports™-Enterprise reports (without the “RB”) are still available in most cases.
- Owing to the changes brought by the Report Builder version of the reports and the newer versions of the word processors, this manual is substantially rewritten. There is more new than old in it.

## NAVIGATING THE FUNCTIONS



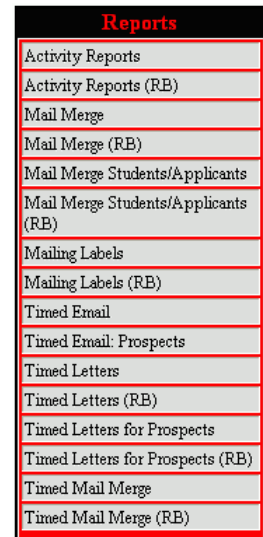
• Figure 1 Toolbar<sup>1</sup> for those with User-ID access

Administrative users have User-IDs and Passwords and see an initial display like Figure 1. Administrative users can be anyone in your system with an ID but typically they're paid Staff and those few Faculty with additional administrative duties.

The access rights of an administrative user is defined by:

1. The **Profile** selected when you were issued a User-ID and Password. Typical Profile categories are the Registrar, the Registrar's staff, the Financial Officer, Admissions staff, Deans, etc. One profile covers all the people in each staff category.
2. The individual limits specified for you when you were issued a User-ID and Password. Typical limits are preventing access to faculty and staff personal records.
3. The **privileges** added for you when you were issued a User-ID and Password. The right to "Make Grades Official" or "View and Change PINs" are examples.

In Figure 1 click **Reports** to get the list at the top of Figure 2. Click **Systems** in Figure 1 to get the selections shown at the bottom of Figure 2.



• Figure 2 Function Lists<sup>1</sup> - Partial

<sup>1</sup> You only see what you're authorized to see by your Profile and individual Limits and Privileges. So your choices may be fewer than these.

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## WHAT DO YOU WANT TO DO?

- Address file separation for paper-mail versus e-mail, page 20.
- Browser setting for security and proper operation, see the SONISWEB® manual “Browser Settings”.
- E-Mail , page 9.
- E-Mail Preparation, page 25.
- Mail Merge and Mail Merge Students/Applicants , page 14.
- Mail Merge File created by export, page 18.
- Mail Merge Process Summary, page 31.
- Mail Merge with E-Mail, page 26.
- Mailing Labels, page 12.
- OpenOffice™ Writer mail-merge example, page 29.
- Preparing and Sorting the Mail Merge File , page 20.
- Preparing the Letter or Other Mailing, page 20.
- Timed Mail Merge, see the SONISWEB® manual “Timed Letters, Timed E-Mail & Timed Mail-Merge”.
- Word mail-merge example, page 23.
- WordPerfect® mail-merge example, page 27.
- WordPro™ mail-merge example, page 30.
- If you don’t see what you need above, check the table of contents on page 2 or use the Adobe® find or search functions illustrated in Figure 3. It allows a Google®-like search<sup>2</sup> by word or phase.



• Figure 3 Adobe® Find and Search

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## Diagnosing and Fixing Problems

See the SONISWEB® text “Messages, Errors, and Diagnosis”.

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## Setting Your Browser for Proper Function and Security

Internet Explorer<sup>3</sup> (IE), Firefox™, Netscape®, and Opera Web browsers have an “auto-complete” or password-form save feature that is handy for individual computers but defeats privacy on shared computers like those in computer labs and libraries. See the text “Browser

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<sup>2</sup> If you’re unfamiliar with this searching, click Adobe® reader Help or see the SONISWEB® text “Index to Texts”.

<sup>3</sup> Only Internet Explorer (IE) version 5.5 or later is supported for administrative use.

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Settings” to set your browser for security, good performance, and to prevent your getting old data.

## BULK E-MAIL AND QUERY BUILDER VS. TIMED E-MAIL AND

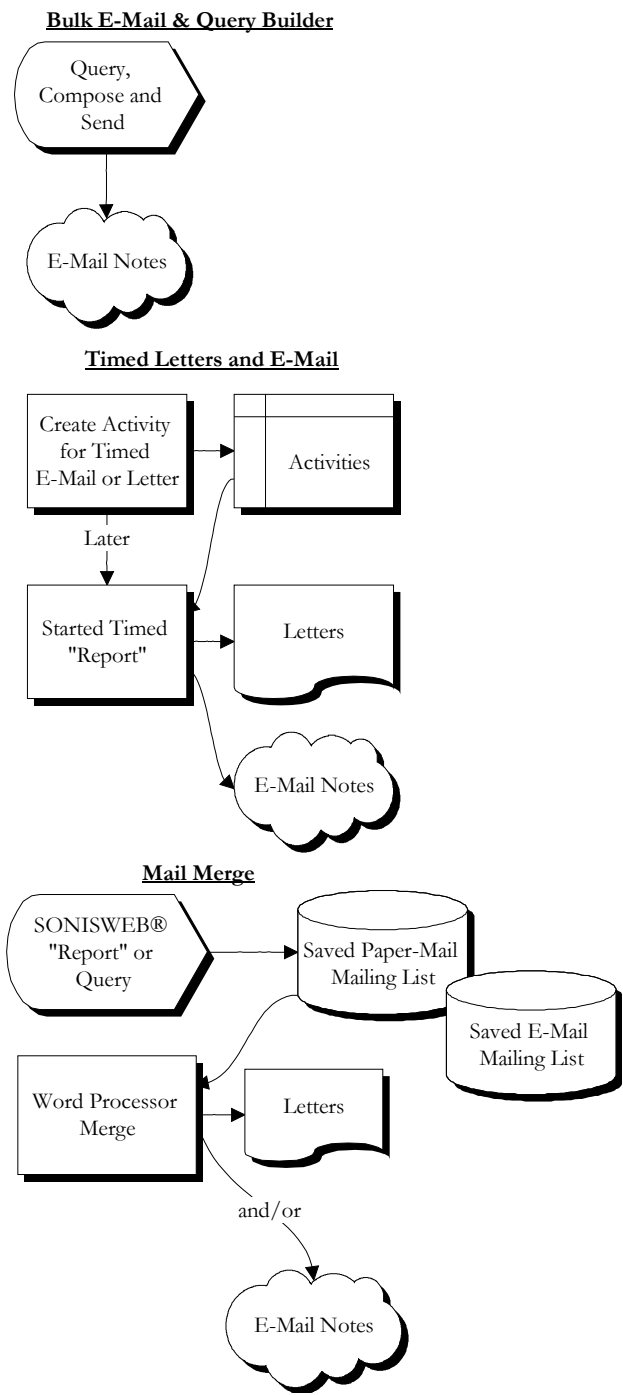
### LETTERS VS. MAIL MERGE

**Bulk E-Mail** (page 9) and **Query Builder** (page 11) work like the top of Figure 4. You select those to receive the e-mail message, compose the note, and send it in a single step.

**Timed Letters and Timed E-Mail** (see the manual “Timed Letters, Timed E-Mail & Timed Mail-Merge”) are driven by a timed activity. You set up an Activity (see the manual above) with the contents of the letter or note and set a “timer”. Later when it’s time to send them, you start the timed “report” you want, and the letters are printed or the e-mail notes are sent. Once you’ve set up the activity, it’s a single-step process to print or send. It’s shown in the center of Figure 4.

**Mail Merge** (page 14) is a two-step process shown at the bottom of Figure 4. You run a “report” that creates a mailing list you save on your computer, then you use the mail-merge feature of your word processor to print the letters, send the letter as an e-mail note, or both.

**Timed Mail Merge** (page 17) is a combination. It requires that a “timer” Activity be set, but then produces a mailing list like that at the bottom of Figure 4. It’s a two-step process.



• Figure 4 Mailing Choices

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## Exclude From Mailings and E-Mail in the Biographic Record

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In each person's Biographic is the exclusion checkbox like that in . If checked, that person is not included in your mailing and lists. See the SONISWEB® manual "Student, Faculty, Applicant, and Alumni/ae Record-keeping" to see the full record display.



• Figure 5 Biographic Record Exclusion

## E-MAIL BULK

Click **Systems** in Figure 1 then Email: Bulk in Figure 2. You get Figure 6.

• Figure 6 Bulk E-Mail

Follow the guidance in Figure 6. When you click Submit you get Figure 7.

Include in Mailing	Name	Email Individually
<input checked="" type="checkbox"/>	Adams, Amy	<a href="#">Email Adams, Amy individually.</a>
<input checked="" type="checkbox"/>	Algonican, Edgar	<a href="#">Email Algonican, Edgar individually.</a>
<input checked="" type="checkbox"/>	Benson, Paul	<a href="#">Email Benson, Paul individually.</a>
<input checked="" type="checkbox"/>	Birdsall, Steven	<a href="#">Email Birdsall, Steven individually.</a>
<input checked="" type="checkbox"/>	Boring, Ulyssus	<a href="#">Email Boring, Ulyssus individually.</a>
<input checked="" type="checkbox"/>	Breck, Bob	<a href="#">Email Breck, Bob individually.</a>
<input checked="" type="checkbox"/>	Brown, Betty	<a href="#">Email Brown, Betty individually.</a>
<input checked="" type="checkbox"/>	Brown, Richard	<a href="#">Email Brown, Richard individually.</a>
<input checked="" type="checkbox"/>	Emerson, Ralph	Preferred address has no email address.
<input checked="" type="checkbox"/>	Frankenheimer, Sam	<a href="#">Email Frankenheimer, Sam individually.</a>
<input checked="" type="checkbox"/>	Green, George	<a href="#">Email Green, George individually.</a>
<input checked="" type="checkbox"/>	Jones, Amanda	<a href="#">Email Jones, Amanda individually.</a>
<input checked="" type="checkbox"/>	Jones, Maybell	<a href="#">Email Jones, Maybell individually.</a>
<input checked="" type="checkbox"/>	Sidway, James	Preferred address has no email address.
<input checked="" type="checkbox"/>	Smith, Wilfred	<a href="#">Email Smith, Wilfred individually.</a>
<input checked="" type="checkbox"/>	Walters, Melanie	<a href="#">Email Walters, Melanie individually.</a>

• Figure 7 Bulk E-Mail Address Options

Here you choose who gets a note and who doesn't. A checkmark means the person receives it, a blank checkbox means they don't. You can also send individual notes from Figure 7. You'll have to find another way to contact those without valid e-mail addresses.

Click the Submit button to send the note. You get Figure 8.

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		<b>Email: Bulk</b>
Emailed:	Amy A. Adams	myemail@myschool.com
Emailed:	Edgar I. Algonican	profalgonican@rjmu.edu
Emailed:	Paul P. Benson	pben@emailaddress.com
Emailed:	Steven Birdsall	?

• Figure 8 Confirmation of the E-Mail Submission

Check the confirmation shown in Figure 8. Although SONISWEB® may detect an e-mail address, it may not be a valid one, as shown in Figure 8. You’ll have to find another way of contacting those people.

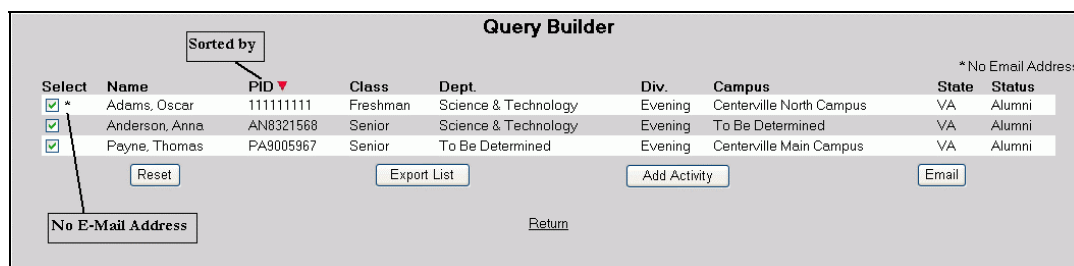
See also “Exclude From Mailings and E-Mail in the Biographic Record” on page 8.

## QUERY BUILDER

Query Builder is best when you want to select by city, state, date of birth, or other criteria not offered in standard mailing reports. See the manual “Query Builder” for the details on using it.

The query results include e-mail addresses if they’re valid. The list does not contain mailing addresses, so it cannot be used directly for a mail merge or mailing labels.

Click **Systems** in Figure 1 then Query Builder in Figure 2. Enter the query and, once you have the results of the query, click ... Distinct Users to get Figure 9.



• Figure 9 Query Builder Actions from the Results

The action you take in Figure 9 depends on these factors:

- The checkmarks under Select in Figure 9 mean these persons are to be included when you click one of the buttons at the bottom of Figure 9.
- The asterisks (\*) beside checkboxes means there’s no e-mail address for this person, so if you use the Email button in Figure 9, those persons will never be sent the e-mail note in spite of the checkmark.

**Reset** erases any checkmark changes you’ve made so you can start over.

**Export List** puts the list in a file for you. When you click the button, your browser asks you where you want it saved on your computer. Once on your computer you can open it in any spreadsheet program that supports the “xls” (Excel) file format.

**Add Activity** opens a dialog with the Activities function of SONISWEB® so you can add an activity for your records.

**Email** gives you a prompting display for entering the e-mail note as shown in Figure 10. When you click the Submit button, the note is sent except to those with an asterisk by their names in Figure 9 because they don't have valid e-mail addresses. See also "Exclude From Mailings and E-Mail in the Biographic Record" on page 8.

• Figure 10 E-Mail from Query Builder Results

**Return** in Figure 9 takes you back to the Query Builder display.

## MAILING LABELS

Click **Reports** in Figure 1. In Figure 2 click Mailing Labels(RB)<sup>4</sup> or Mailing Labels.

• Figure 11 Mailing Labels (RB) Selections

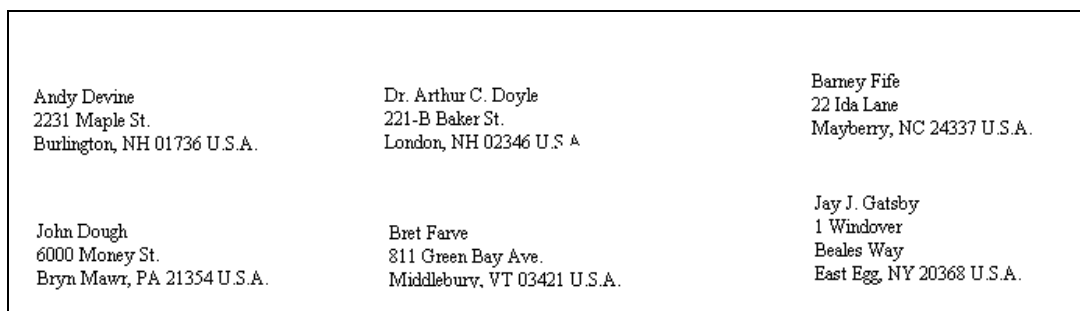
Make your selections in Figure 11.

- If your school uses "Label 1" and/or "Label 2", follow your school's instructions for their use. ("Label 1" and "Label 2" can be set in individual address records and in-

<sup>4</sup> Most of the reports have been rewritten in the Cold Fusion™ Report Builder. Those have "(RB)" following their names as seen in Figure 2. The older Crystal Reports™-Enterprise reports (without the "RB") are still available in most cases but they don't have any of the enhancements in them.

voked here. Some schools use them to produce labels that go both to the student and to a parent or guardian. To use them, though, there has to be institution-wide agreement as to what they're to be used for.)

- If there's a number in the ID box and you really want to select more than one person, use the Clear Name button to clear the ID.
- The Active selection applies mostly to Students. Do you want to include only those active?
- When only the blank Program is selected (near the center of Figure 11), only those students not assigned a Program Code are included in the labels. You can continue to select multiple Programs for a mailing including the blank option to include those not assigned a Program Code.
- PDF is the best choice for printable labels. ("Flash Paper" can be zoomed in and out which can make precise alignment with label stock difficult.)
- Excel (spreadsheet) file is best if you're generating a mailing list. It can be used by most spreadsheet programs and can serve as the address file in a mail merge (page 14).



• Figure 12 Mailing Label Example

The labels are illustrated in Figure 12.

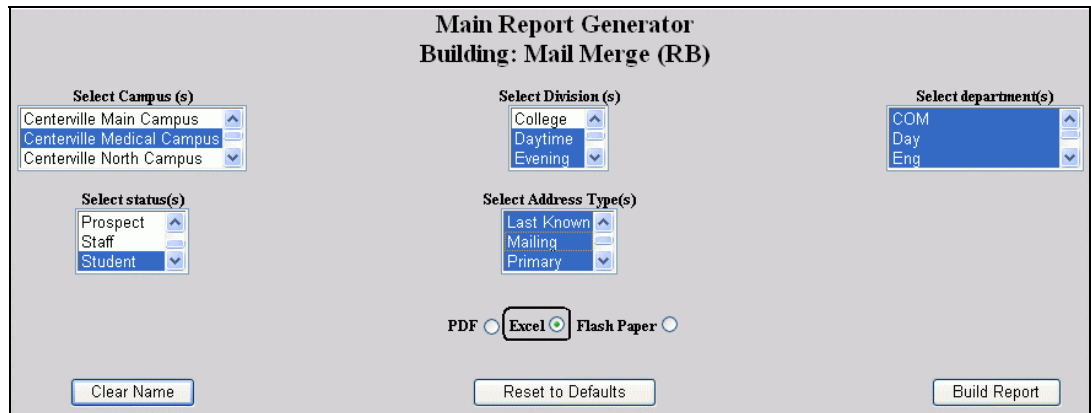
- They're in alphabetical order top to bottom, left to right. If you want them in some other order such as zip or postal-code, use the Excel option in Figure 11 to create a table you can sort (page 20).
- Where you select multiple addresses and/or picked "Label 1" and/or "Label 2" (Figure 11), each additional "Label" address will appear beneath the "preferred" address.

See also "Exclude From Mailings and E-Mail in the Biographic Record" on page 8.

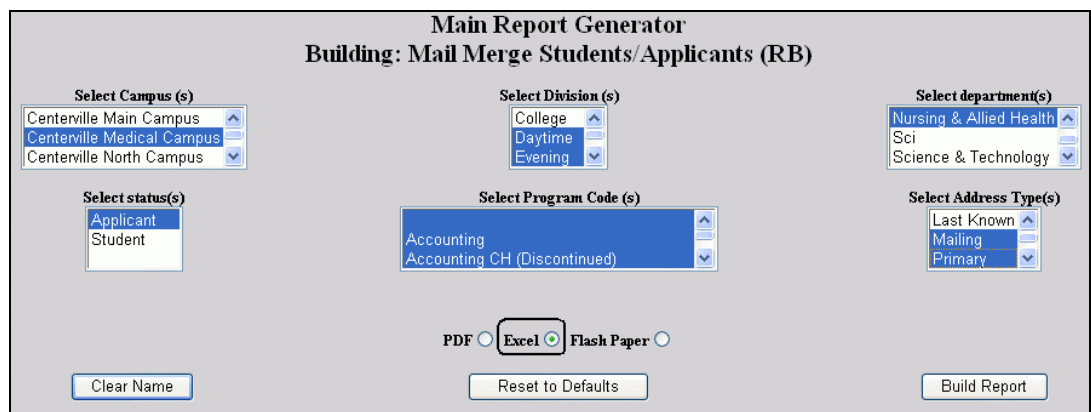
## MAIL MERGE AND MAIL MERGE STUDENTS/APPLICANTS

Click **Reports** in Figure 1. In Figure 2 click either:

- Mail Merge(RB)<sup>5</sup> to get Figure 13, or
- Mail Merge Students/Applicants (RB)<sup>5</sup> to get Figure 14.



• Figure 13 Mail Merge (RB)<sup>4</sup>



• Figure 14 Mail Merge Student/Applicants (RB)<sup>4</sup>

1. You see a prompting display like Figure 13 or Figure 14 asking you to select the status (role) of persons and/or the campuses and/or address type<sup>6</sup> you wish to include in your mail merge list. Which choices you see are defined in your role-based profile.

If you choose more than one “Address Type” in Figure 13 or Figure 14, you get multiple addresses for those persons having more than one address. That means you

<sup>5</sup> A Crystal Reports™ version (without the RB) is also available. See also footnote 4 and the “export” instruction on page 16.

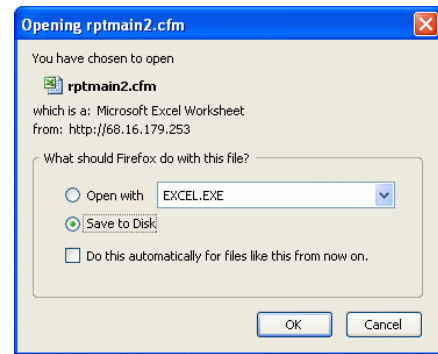
<sup>6</sup> Students typically have a mailing address, often their dorm, and a billing address at their parents’ home. Often faculty, alumni/ae, and contributors will have a mailing (home) address, a work (office) address, and a summer address.

must manually remove the duplicate addresses from the list as discussed in “Preparing and Sorting the Mail Merge File” on page 20.

SONISWEB® searches the databases for persons meeting the criteria you set up in Figure 13 or Figure 14. However, see “Exclude From Mailings and E-Mail in the Biographic Record” on page 8.

	A	C	D	F	H	J	L	M	O	Q	S	U	W	Y	AA	AC	
1																	
2			activi	soc_sec	last_name	first_name	MI	Prefi	Suffix	st_addr	add_addr	add_add2	city	state	zip	country	phone
3		MM1	0		Adams	Amy	A	Ms.		115 Poplar			Chapel Hill	NC	27516	U.S.A.	
17		MM1	4755787		Brown	Elizabeth	A			Brown Billing			Chapel Hill	NC	27511	U.S.A.	
18		MM1	BR40715		Brown	Richard				54 East	Apt 3B		San Mateo	CA	87665	Canada	203-665-
20		MM1	CR72334		Cross	Frank				42 Beacon St.			Waterbury	CT	6710	U.S.A.	211-743-
33		MM1	8888988		Johnson	Dale	W.	Dr.		1220			Wrightsville	NC	39919	U.S.A.	949-555-
35		MM1	JO11632		Jones	Amanda	B.			15275 New			Cabarras	NC	28111	U.S.A.	919-555-

• Figure 15 Report Builder (RB) Spreadsheet Output via Web Browser “Plug-in”



• Figure 16 Report Builder (RB) Spreadsheet Output via Web Browser Save Prompt

1. For the PDF and Excel choices in Figure 13 or Figure 14, what you get depends on how your Web browser is set for downloads<sup>7</sup>.

If it's set to use “plug-ins” your spreadsheet program is invoked and it appears like Figure 15. Use the disk icon to save it on your computer.

If it's set to download, you get Figure 16. There you're prompted to specify a location for the file.

2. See “Preparing and Sorting the Mail Merge File” on page 20 to do any clean-up needed on the table and start your word processor to do the merge.

<sup>7</sup> For more on browser settings, see the SONISWEB® manual “Browser Settings”.

## Crystal Reports<sup>™</sup> Export as a File

To create the file of mail merge addresses follow these steps when viewing the Crystal Reports<sup>™</sup> version of the report.

soc_sec	last_name	first	M	Pr	Suf	Ni	st_addr	add_addr	add_addr2	city	state	zip	phone	e_mail	fax	mod	camp_co
00000000	Adams	Amy	A.	Dr	A		115 Poplar			Chapel Hill	NC			email		PS	CAMPI
90909090	Applegate	Cynt	H.	M.			Cy							c@mail.com		PS	TBD
33333333	Abbott	Lou	C.	M.			Lo							la@mail.co		PS	CAMPI
PE222222	Pennyweather	Penel	P.	M.			Pe 45 Apple Lane			Chapel Hill	NC	2345	806-544-76	pennyweathe		PS	CAMPI

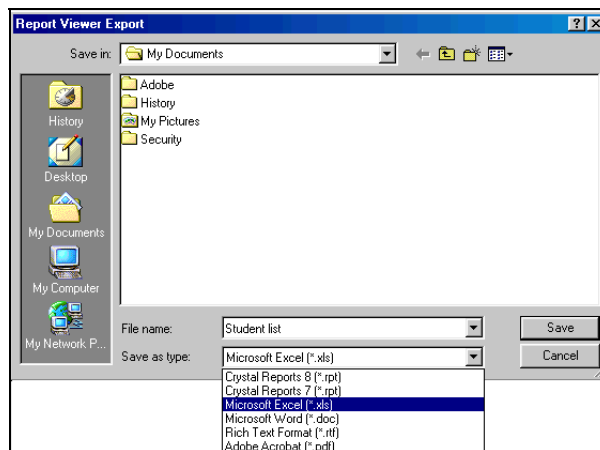
• Figure 17 Mail Merge Report

The report you get when you run any of the Crystal Reports<sup>™</sup> mail merges looks like Figure 17. It is highly compressed, not designed to be read<sup>8</sup>.

1. Click the icon with the envelope-and-arrow as shown in Figure 18. This is the Web export icon. You get the selection in Figure 19.



• Figure 18 Export



• Figure 19 Export Format

2. Pick the export format you wish to use. The pulldown arrow in Figure 19 gives you a few choices. The spreadsheet format “Microsoft Excel (\*.xls)” will work if you have or wish to use Excel, OpenOffice<sup>™</sup> Calc, or Lotus<sup>®</sup> 1-2-3.
3. You are prompted for a file name and a folder-directory as illustrated in Figure 19. Note the name and location so you can find it when you begin using it.

The file is a spreadsheet table that you can sort and otherwise manipulate. Although designed for mail merge, users have found other analytical and reporting uses for this file.

<sup>8</sup> Unlike the Excel option in Report Builder (Figure 13 and Figure 14), Crystal Reports<sup>™</sup> requires that the report be displayed even though it is destined to be exported as a file. You can view its contents better with a spreadsheet program as described in “Preparing and Sorting the Mail Merge File” below.

## TIMED MAIL MERGE

It works like mail merge above but it's dependent on timing Activities. This is covered in the SONISWEB® text "Timed Letters, Timed E-Mail & Timed Mail-Merge".

## MAIL MERGE DETAILS

### Mail Merge File

The file consists of these fields<sup>9</sup>:

soc_sec	The ID number of the person. (Until changed by privacy laws, many schools used the Social Security number as the ID, thus the “soc_sec” name for the field.)
last_name	Last name
first_name	First Name
MIPeriod	Middle initial. SONISWEB® mail merge modifies the contents of the output table so that, if the field is present and does not have a period at the end, a period is added.
PrefixPeriod	Prefix such as Ms., Rev., Mr., Dr., Mrs., etc. SONISWEB® mail merge modifies the contents of the output table so that, if the field is present and does not have a period at the end, a period is added. If this field is empty, mail merge puts the two characters M and . (period) in it.
SuffixComma	Suffix such as Jr, Sr, III, etc. Mail merge modifies the contents of the output table so that, if the field is present and does not have a comma at the beginning, a comma and a space are added.
Nickname	Sometime called preferred name, this is how the person prefers to be addressed in informal material. Mail merge modifies the table so that if there is no nickname, the first name is placed in the field.
st_addr	Street address, the only address in most records.
add_addr	The second line of the address. Most word processors will skip blank address lines so you do not get a blank line if this address is not present.
add_add2	The third address line. Most word processors will skip blank address lines so you do not get a blank line if this address is not present.
city	City
state	State or Province
zip	Zip (USA) or Postal (non-USA) code. Since most postal services provide a mailing discount for mail sent in zip-postal-code order, many users sort the mail merge file in “zip” order <u>before</u> using it in the word processing program.
phone	Primary telephone number.
e_mail	E-Mail address, important if some or all of your mailing is to be by e-mail. See “E-Mail Preparation” (page 25) for the use of this field.
fax	Primary tele-facsimile number.

<sup>9</sup> “Mail Merge Students/Applicants” and “Timed Mail Merge” include fewer fields in their exported table files.

mod_stat	<p>The status (role) of the person. This is used by some schools to sort the table into the categories for different mailings or for direct delivery. The “mod_stat” categories are:</p> <ul style="list-style-type: none"><li>■ AL = Alumni-Alumnae</li><li>■ AP = Applicant</li><li>■ CO = Constituent (contributor or volunteer)</li><li>■ FA = Faculty</li><li>■ OA = Online Applicant</li><li>■ PS = Prospective Student</li><li>■ SF = Staff</li><li>■ ST = Student</li><li>■ WD = Withdrawn Student</li></ul>
camp_cod	<p>Campus code from the person’s record; it is often an automatic selection when you start <u>Mail Merge</u> or it is a selection you can make. This is the nominal assignment of the person. You can sort the mail merge file in “camp_cod” order for direct delivery of the mailing.</p>

• Figure 20 Merge File Field Descriptions

## Preparing and Sorting the Mail Merge File

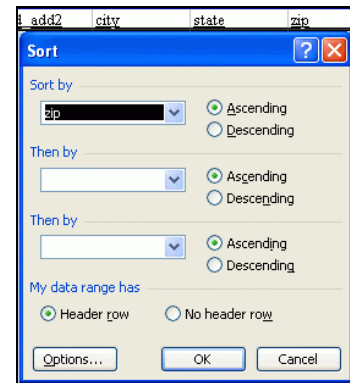
To view and/or sort the mail merge file, open it with a spread sheet program such as Excel, OpenOffice™ Calc, or Lotus® 1-2-3.

If you have not done this mailing before, it is a good idea to build a very small mail merge file by deleting all but a few of the mail merge records and run a test to make sure that the names and addresses appear on the letters the way you want. You can then save the letter and the mail merge format, run your mail merge again for all of the names and do the final merge. **Caution:** as noted on page 17, you cannot run a Timed Mail Merge again.

For better viewing, select all the columns in the spread sheet and widen them so that all of the data are visible. In Excel this is done with Format (on the top task bar) then Column then Autofit. In Open Office™ and Lotus® 1-2-3, select all the columns, then click the right mouse button and pick “Optimum Column Width” (OpenOffice™) or “Fit widest entry” (Lotus®).

As Figure 21 illustrates, you can sort it into an order for mailing. Click **Help** in your spreadsheet to learn how to sort.

If you picked more than one address in the prompts, this is where you remove the duplicate addresses by deleting the rows with duplicate names.



• Figure 21 Sorting by Zip-Postal Code

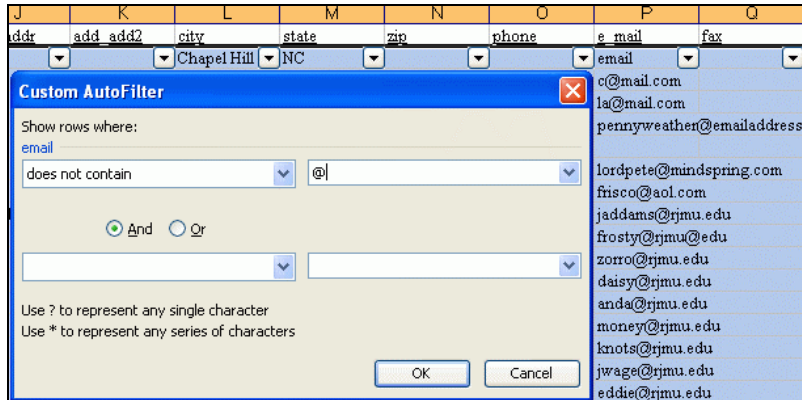
## E-Mail, Paper Mail or Both

- If you intend the mailing to be only on paper, skip directly to mail-merge examples on pages 23, 27, 29, and 30.
- For e-mail delivery only start with “E-Mail Preparation”, page 25.
- For e-mail to those with e-mail addresses and paper for those without such addresses, separate the address list into two.

## Separating Paper and E-Mail Address Lists

You can sort the file by the “e\_mail” column. That usually isolates those with empty e-mail addresses. If you use a spreadsheet program that has “contains” logic as a filter option, use it to check the e-mail address for the required “@”

symbol. Figure 22 shows a “does not contain @” filter that gives you a list of those without e-mail addresses to save for the paper mail merge. A “does contain @” filter gives you a similar list for those eligible for e-mail. However, an e-mail address can have the required @ symbol but still not be valid.



• Figure 22 Filtering to Isolate E-Mail versus Paper Mail using Excel

Check to be certain that your e-mail system and your word processor are compatible. Some word processing software supports only MAPI<sup>10</sup>. OpenOffice™ Writer requires a Java mail server (free). Others support both MAPI and POP3<sup>11</sup>. Some word processors “print” the letters to a virtual printer – a special queue – from which the mailing is done. Some e-mail suppliers support one protocol but not the other.

<sup>10</sup> MAPI = Messaging Application Program Interface

<sup>11</sup> POP3 = Post Office Protocol 3, the standard offering from most e-mail suppliers.

## Preparing the Letter or Other Mailing

The least confusing way to use your word processor for mail merge is to separate the preparation of the form letter from the merging process.

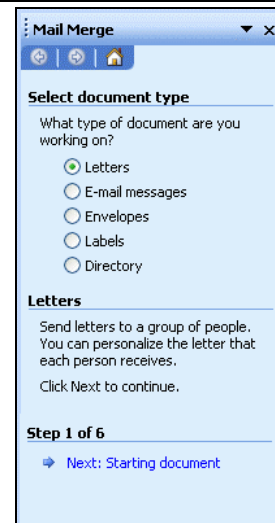
If you are not experienced in using mail merge, now is the time to attend a class, view a video course, get a good textbook on mail merge, or find an experienced colleague who can teach and guide you. You'll find the following description very confusing without a basic knowledge of mail merge.

1. Prepare the letter, leaving space for the name, address, salutation and any other information you intend to get from the mail merge file. Figure 26, Figure 32, Figure 34, and Figure 37 are examples of the address insertion process.
2. If you plan to send e-mail to those with e-mail addresses and paper to those without, you should prepare two slightly different versions of the letter as described in “E-Mail Preparation” (page 25).
3. Sort, modify or otherwise prepare the mail merge file as described in “Preparing and Sorting the Mail Merge File” and “Separating Paper and E-Mail Address Lists” above.

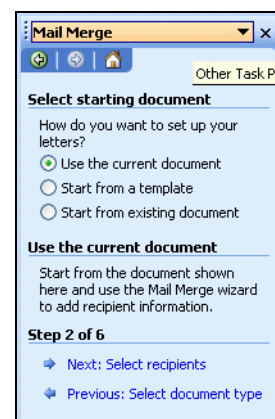
## Mail Merge Example for Word without E-Mail

All of the popular word processors have mail-merge “wizards” to guide you through the process (see pages 27, 29, and 30 for other word processors). They vary by version even within the same brand. For example Word 95-Word 97 and Word 2000-Word 2003 work differently. You’ll need the manual for your chosen word processor.

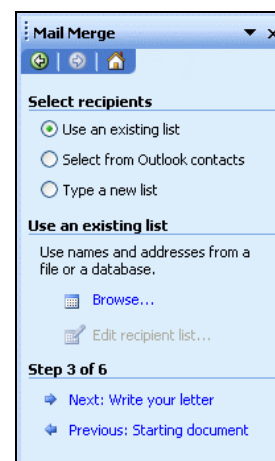
1. Start Word and open the letter you have built in “Preparing the Letter or Other Mailing” (page 20).
2. Click the mail merge function under Tools on the task bar at the top. You get a “wizard” or helper screens like those in Figure 23, Figure 24, Figure 25 (Microsoft® Word 2003).
3. Follow the “wizard” (step 1 for Word) to retrieve or create the letter or flyer you want to send.
4. In Figure 25 provide the name of the SONISWEB® mail merge file you exported and modified as described in “Preparing and Sorting the Mail Merge File” (page 20).



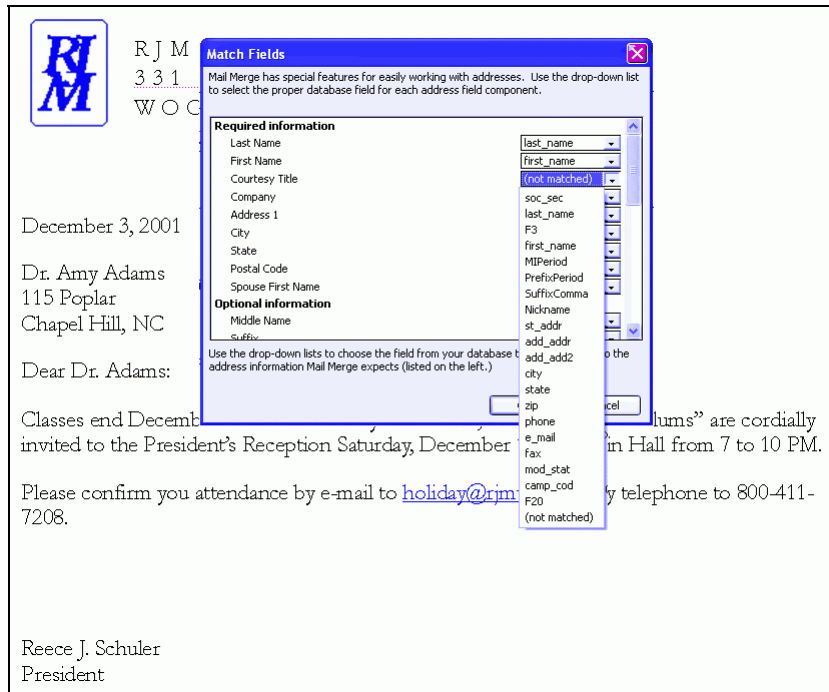
• Figure 23 Picking the Format



• Figure 24 Choosing the Document



• Figure 25 Getting the List of Addresses



• Figure 26 Inserting Mail Merge Fields in Letter

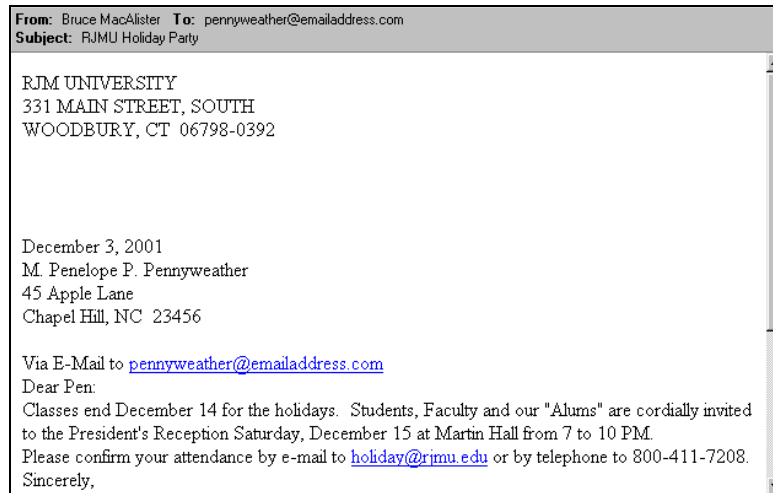
5. Insert the names of the fields from the SONISWEB® mail merge file, placing them where you want them in the letter. You have the option of setting up an “address box” and matching fields (Figure 26) like OpenOffice™ Writer or inserting the fields directly as in prior versions of Word, WordPerfect®, and WordPro®.
6. Run the merge step and view and/or print the letters. Note that you can view the merged letters on your display before printing them.

For paper-mail only, you are done.

## E-Mail Preparation

Unless you need the unique formatting of a word processor, using “E-Mail Bulk” (page 9) is much simpler.

You have a decision to make for e-mail delivery. Do you want the e-mail letter to be serviceable or pretty?



• Figure 27 E-mail Output

Figure 27 is an example of serviceable. It is a simple plain text note. By forcing more spacing in the original word processor letter, you can improve its looks and readability but it will still be plain text.

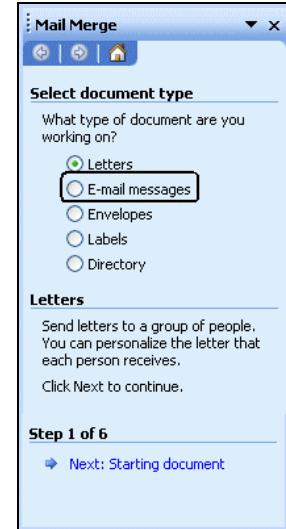
If you want “pretty” you should look at the guidance in your word processor document for producing an HTML<sup>12</sup> version with logos and fonts as seen on paper. Most, but not all, e-mail software can handle a note containing HTML. For those receiving your note without HTML-capable software however, it may look strange and not at all what you intended.

<sup>12</sup> HTML is HyperText Markup Language, the way most Web pages are built.

## Mail Merge with E-Mail

1. If you've not done it already, separate the mailing list into those to go by e-mail and those to be sent on paper. See "Separating Paper and E-Mail Address Lists" on page 21 for the process.
2. Follow the steps in your word processor manual. For Word, the e-mail selection is outlined in Figure 28.
3. The wizard's steps (the bottom of Figure 28) carries you through the steps to send it as e-mail.

You can also send the letter as a merged e-mail note with OpenOffice™ Writer. The wizard (Figure 33) and the process of extracting the e-mail addresses are different. See the documentation for the Writer.

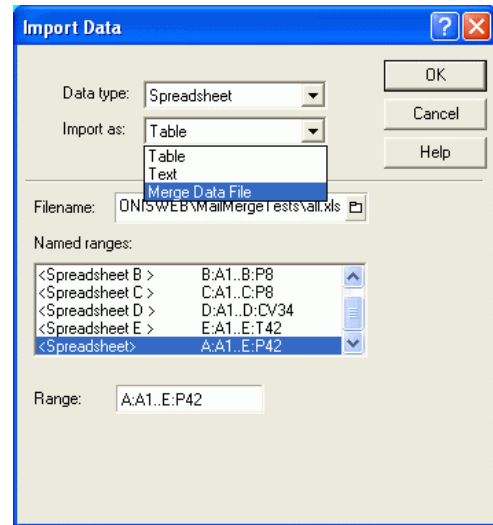


• Figure 28 E-Mail Choice in Word E-Mail Merge

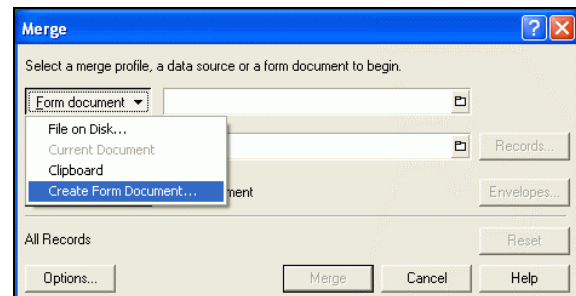
## MAIL MERGE EXAMPLE FOR WORDPERFECT®

WordPerfect® requires a “dat” (data) file for the address list and a “frm” (form letter) file for the letter. They’re simple to set up; you open each of the originals in WordPerfect® and follow the guidance to save them in these required formats.

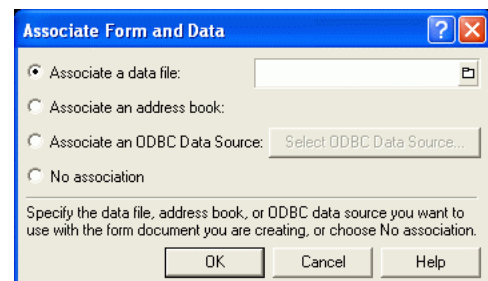
1. Open the address list file in WordPerfect®. You see the conversion prompt in Figure 29. The result of the import is the original list with special codes (in red) that you save as a .dat file.
2. In WordPerfect® open the letter you have built in “Preparing the Letter or Other Mailing” (page 20).
3. Click the mail merge function under Tools in the task bar at the top. You get “wizard” or helper screens like Figure 30.
4. Use the “Create Form Document” option in Figure 30 to create .frm (form letter) file from the letter you have opened.
5. In Figure 31 you connect the form letter and the address list (the “dat” file you created above).



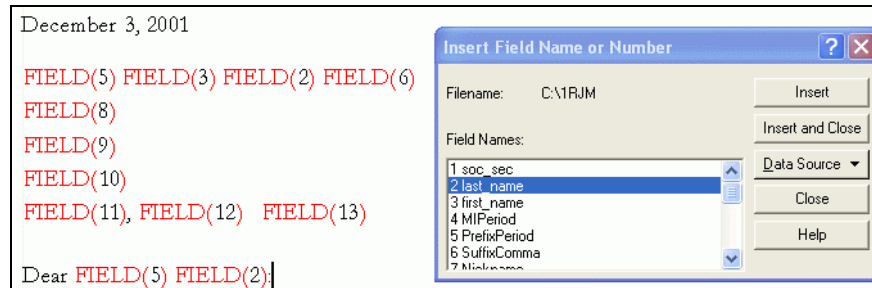
• Figure 29 Conversion of Address Spreadsheet File to WordPerfect “dat” File



• Figure 30 Mail Merge Wizard for WordPerfect®



• Figure 31 Associating the Data File and the Form Letter

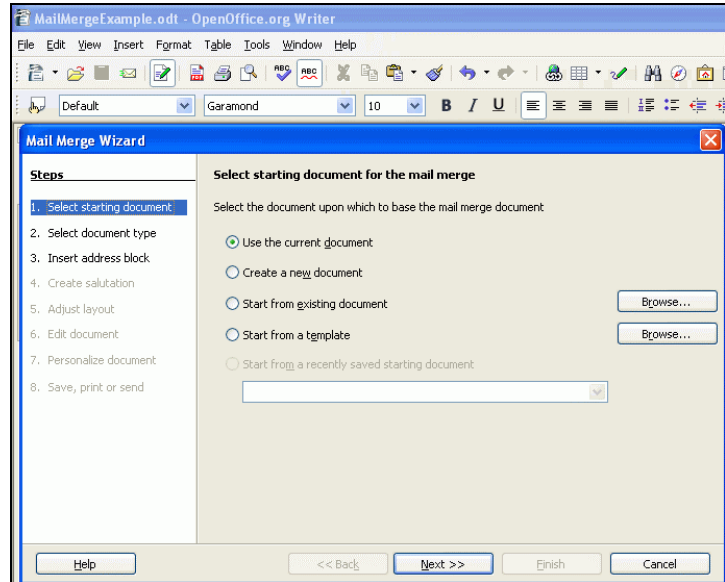


• Figure 32 Inserting Address List Fields into the Letter

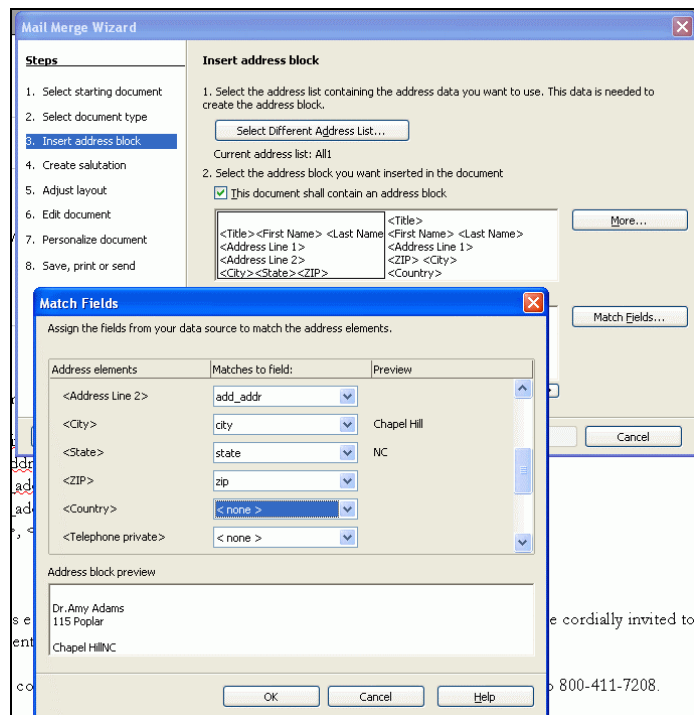
6. In Figure 32 you insert the fields from the address list file into the body of the letter. While inserting the fields you set your spacing and punctuation as you want it. Use the “Output” button in Figure 30 (hidden by the pulldown list) to merge, view, and print the letters.

## MAIL MERGE EXAMPLE FOR THE OPENOFFICE™ WRITER

1. Start the Writer and open the letter you have built in “Preparing the Letter or Other Mailing” (page 20).
2. Click the mail merge function in Tools on the top task bar. You get “wizard” or helper screens like Figure 33.
3. OpenOffice uses an “address block”. You must match the fields in the mailing list file (Figure 20) to the standard terms in the “address block” as Figure 34 illustrates.
4. Follow the “wizard” to complete the merge where you can view and/or print or send the letters.



• Figure 33 Mail Merge Wizard for OpenOffice Writer

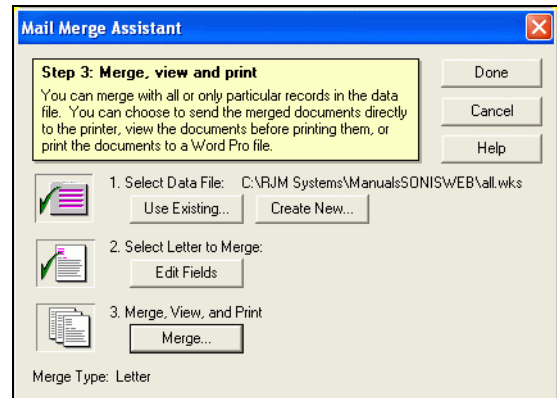


• Figure 34 Address Field Matching

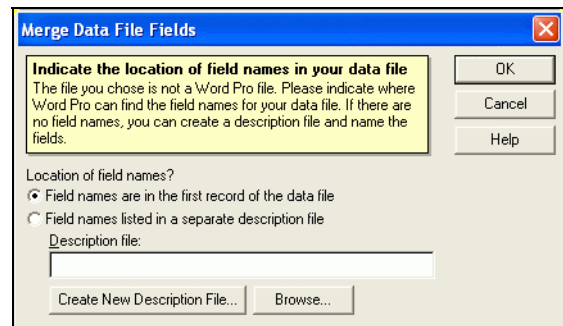
## MAIL MERGE EXAMPLE FOR LOTUS® WORDPRO™

Lotus® WordPro™ uses wizards with step-by-step instructions as shown in these figures.

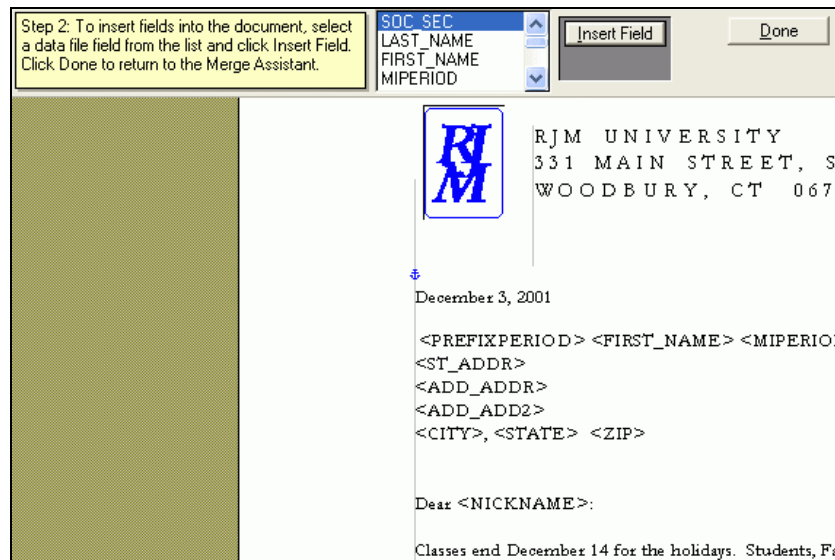
1. Start WordPro™ and open the letter you have built in “Preparing the Letter or Other Mailing” (page 20).
2. Start the Merge process. It’s under Text on the task bar. You see the wizard in Figure 35.
3. Select the mail merge file with addresses, Figure 35. You get Figure 36.
4. Insert the fields in the address file into the document as shown in Figure 37.
5. Click the Merge button in Figure 35 to merge and view and/or print the letters.



• Figure 35 Mail-Merge Wizard with WordPro™

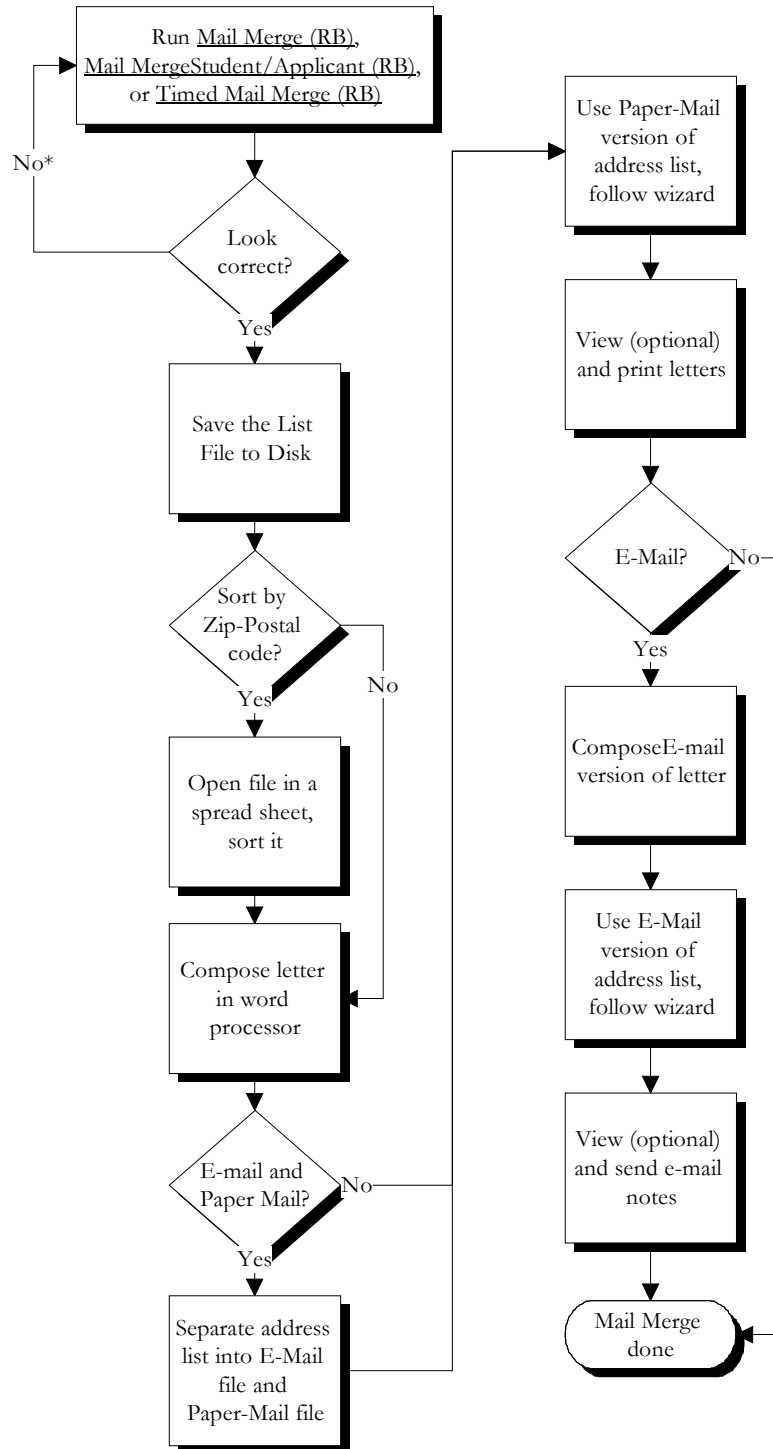


• Figure 36 Picking the Address File



• Figure 37 Placing Address File Fields in the Letter

**MAIL MERGE PROCESS SUMMARY**



\* Note you cannot run Timed Mail Merge again

• Figure 38 Mail-Merge Process

Mail merge is an ideal way to create attractive letters, brochures and mailing labels to send to your constituents. Successful use of mail merge requires:

- Skill using the mail merge capability of your chosen word processing software. Classes, instructional videos and detailed textbooks are the usual means of acquiring that skill. This text shows a few displays from the process but it is no substitute for formal training in using your word processor for mail merge.
- A clear understanding of the data that SONISWEB® mail merge provides. That is illustrated in “Mail Merge Process Summary” (page 31) and “Mail Merge File” (page 18). Use a spread sheet program to examine the file produced by mail merge. Does it contain titles you wish to use? Are e-mail fields present?
- Determine how you want the file ordered before using it in your word processing program. Do you want it in zip-postal-code order for lower mailing rates? Sort it in campus order for direct delivery? Put it in status (role) order for mail handlers? All these can be done in a spread sheet program then saved to be used by your word processor. Although examples are shown for sorting, you need skill in that function for your chosen spread sheet software.

## GETTING STARTED - LOG IN AND THE USE OF TABS, BUTTON AND FIELDS

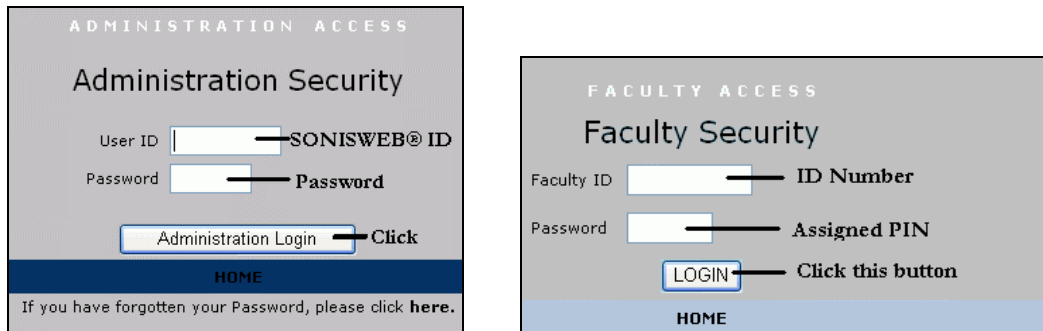
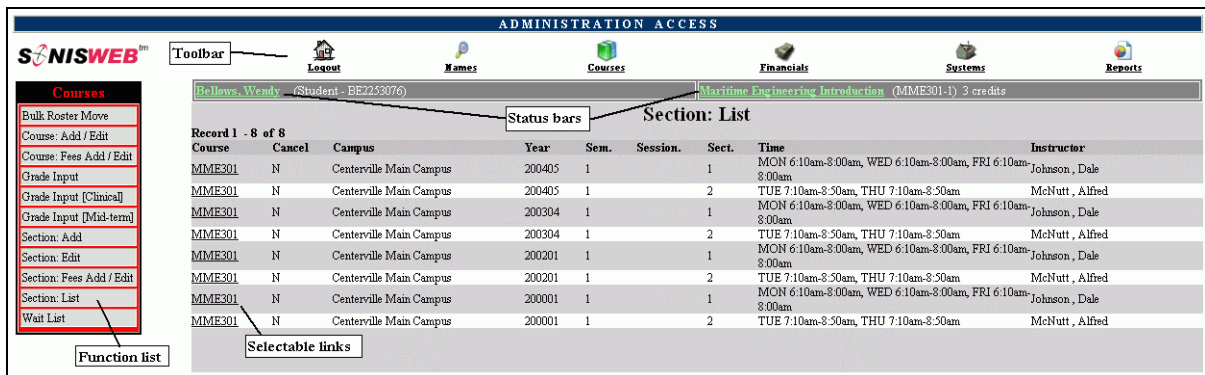


Figure 39 Login Displays

To log in as an administrator, select that option from your Web page. The standard SONISWEB® login pages look like Figure 39.



• Figure 40 Typical SONISWEB® Page

Figure 40 is a typical SONISWEB® page. The actions authorized in your profile appear at the top, called the **Toolbar**.

When you make a selection from the **Toolbar**, the applicable **Function List** appears on the left. Only the functions authorized in your assigned profile and your individual limits and privileges appear. Some might have only **Courses** in the toolbar and only **Course: Add/Edit** for functions.

Not apparent on the display is whether or not the profile permits editing or changing the information. Once the you select a function from the list on the left, you will see a Submit or similar button at the bottom of the display if you have the permissions to add, edit, or delete the data.

By clicking a **Status Bar** you quickly return to the “person” or the “course” you were processing even if you left it temporarily to look at a financial display or a report. Of course, if you have not selected a person with **Names** or a course with **Courses**, there will be no **Status Bars** at the top.

In Figure 40 click an underlined **Selectable Link** and you go to that record.

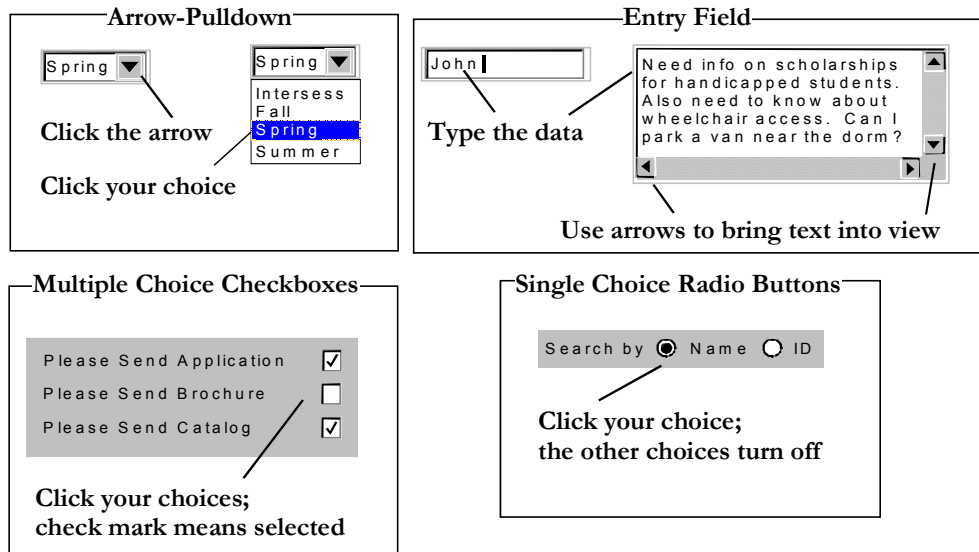


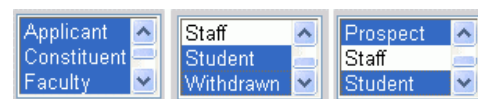
Figure 41 Arrows, Fields, Checkboxes and Buttons

SONISWEB® prompts you for information with windows like those in Figure 41. Use your mouse to click your selection.

- Once you have made your selection(s), you must click an action button; usually it is Submit, Delete, Reset, etc.
- For Entry Fields, click the beginning of the field so you don't get any blanks inserted in front of your entry.
- With Multiple Choice Checkboxes, each time you click a box it goes from selected (check mark) to unselected (no check mark). Click it again and it is selected, etc.
- Radio Buttons allow only one to be selected; when you click one, all the others are turned off.

Some SONISWEB® lists permit you to make multiple choices. It works just like most PC spread sheet software.

- To pick two or more in a series, click the top selection, hold down the **Shift** key on the keyboard and click the bottom item in the series. Release the shift key and they are selected as shown on the left and middle of Figure 42.



● Figure 42 Selecting Multiple Choices

To pick two or more that are not adjacent, click the first item, hold the **Ctrl** key on the keyboard, select the next item and the next, etc. When you have picked the last item you want, release the **Ctrl** key and you see the selections like those on the right of Figure 42.