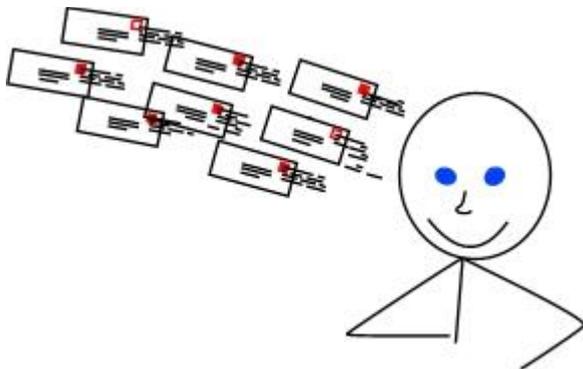




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IT Accessed have teamed up with people and technology harmonisation specialists **Ryan Solutions** to produce a series of articles for the UK's Chartered Institute of Personnel Development (CIPD). This article originally appeared in the CIPD's Spring 2007 newsletter for North Yorkshire, UK.

Mail Merge – Try It!



If your eyes glaze over when someone says “mail merge” read on.

So what is it – exactly?

Mail merge allows you to send personalised documents to all or selected recipients on a list by using the personal information on the list - rather than typing the information in individually.

So can you give me an example?

Say you wanted to send a letter out to 100 employees informing them of new terms and conditions. You can type the letter once, select a

list of recipients and perform a merge to produce 100 individually addressed letters - which you can then print.

What sort of other documents can I send?

A note a letter, a newsletter, a promotional flyer **printed or via e-mail** – any Microsoft Word or Publisher document. *Note the e-mails are sent via Outlook but you type the e-mail into Word.*

Note: Microsoft Word 2003 allows you to merge personalised e-mails, however you need the latest version of Publisher – 2007 – to send personalised e-mails from Publisher. Personalised e-mails could be used for a newsletter – all nicely formatted and starting with Dear “My Employee” or simply an unstructured but personalised e-mail to Dear “Employee Name”

TIP: You can create newsletters etc. in Word but Publisher makes it easier and has more formatting options.

How do I do it?

There are several different ways to perform a mail merge and this probably helps to confuse everyone. However you don't need to use them all - spending a little time finding what works for you will not only save you time in the future but also allow you communicate more effectively.

You can start the mail merge from Outlook, Word, Publisher, Microsoft Access or from bespoke software.

The best place to start depends on how you use the software on your PC and in your organisation.



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How do I decide where to start?

The first thing to do is to locate the list of recipients. We will assume this is a list of employees.

Whether your organisation is large or small, you will almost certainly already have employee details in electronic format. This list could be on a complex HR software package or in a smaller company a spreadsheet or simpler software package. It could also be your Outlook Contacts (Address) book.

Wherever the list is you could copy it, but it may be better to use the list directly and avoid needless duplication (and the errors and confusion that can cause).

Once you have established that the list exists and in what system, you need to make sure you will be able to identify the **exact** file containing the list in that system. This is because you need to be able to click on the file when you do the merge in order to link the list with your document. If the file is a spreadsheet on your own PC or in your area of a network, this is fairly easy - you can just browse through your folders. If the file is part of a HR system it can be tricky to locate and it may not have an obvious name – you should always in this case check with your IT department before you start looking.

Before you decide where to start, you also need to decide what sort of communication you wish to send – printed newsletter from Publisher, e-mailed announcement from Word etc.

We can't cover all the combinations here, but if you are new to mail merge, have a go at following the example below. After mastering that, try out the Tools then the Mail and Catalogue Merge or Mail Merge option on the menus in Publisher 2003 and Outlook 2003 respectively (in Outlook you need to be viewing your Contacts before you can see this option). Test them out and find the best method for you.

TIP:

The Microsoft website has tons of help with mail merge – go to www.office.microsoft.com/help . The “Crabby Office Lady” help is particularly good – all versions of office are covered.

Warning: if you are doing a merge to e-mail, do your testing on your own address or that of a willing colleague(s) – be careful not to accidentally send your test e-mail to all your contacts!



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Simple Example: if you use Office 2003, to build you confidence follow these steps on your system. The steps below follow a basic method, most options and variations are ignored.

We will use the example of sending a newsletter written in Microsoft Word to employees via e-mail, addressing each employee by their first name, and using Outlook Contacts as the recipient list.

1. First, forgetting all about mail merge for a while, create and save a test newsletter in Word leaving the recipient name blank. Just type a sentence or two if you like just enough to test how the process works.



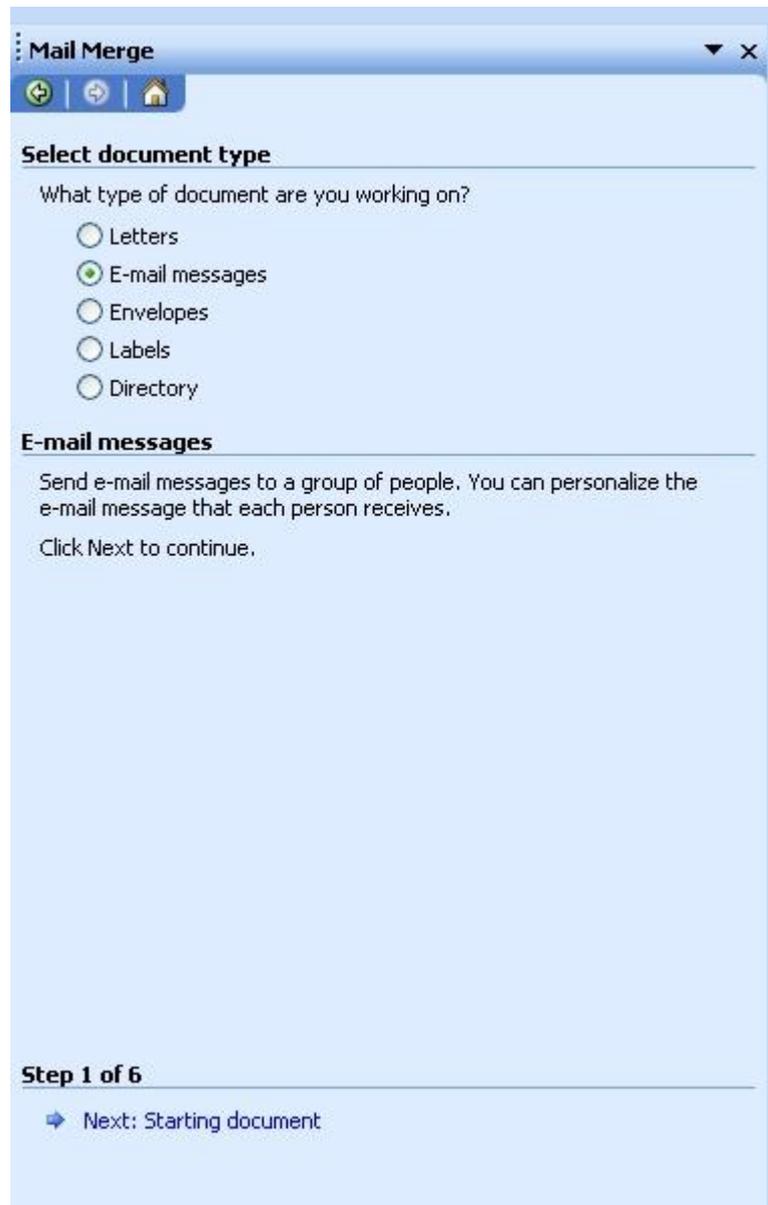
2. Now start the Word Mail Merge wizard to guide you through the rest of the process. To do this, click “Tools” on the top menu bar followed by “Letters and Mailings” and finally “Mail Merge”.



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Step by step instructions for our example using this wizard.

3. You will see a panel open usually on the right hand side of your screen.
4. Click the “E-mail messages” radio button under “Select document type”.
5. Click “Next: Starting document”.
6. Click “Next: Select recipients”.
7. Click “Select from Outlook contacts” under “Select recipients”.
8. Click “Choose Contacts Folder” under “Select from Outlook Contacts”.
9. A list appears - with a bit of luck containing only one choice. If so click OK. If you have more than one file to choose from click one and then click OK.



10. If you have chosen the correct file you will see a list of all the people in your Outlook Contacts, if this is the case go to step 11: otherwise click OK on any list that does appear and click “Choose Contacts Folder” again. If you can’t find the list of people you want or you are getting errors messages, contact your IT support. Alternatively try another way of mail merging see **TOP TIP** below (you won’t lose the newsletter document as this has been saved).
11. All the contacts in the list that appears probably have a tick next to them. If you want to send the mail to all of these that’s fine, otherwise you can remove the ticks from those contacts you don’t want to receive the mail. – just click the tick box.. You can also sort and filter using the column headings, find a particular person using “Find” and remove all the ticks by selecting “Clear all”. Once you are happy with the contacts selected click “OK”.



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12. Click “Next: Write your e-mail message”
13. Position the cursor in your document so it is a space removed from where you require the recipient name to appear. In our case this is just after the word “Dear”.
14. Click “More items” under “Write your e-mail message”
15. Click “Insert” (make sure “First” is still highlighted – it is automatically when you enter the window).
16. Click ”Close”.
17. Click “Next: Preview your e-mail messages”
18. Click “Next: Complete the merge”.
19. Click “Electronic Mail”.
20. Here you get the opportunity to enter a subject for the mail.
21. **Warning:** the next step will send the mail – so make sure you have selected the correct recipients and that the content of the mail is correct!
22. Enter the subject and click OK.

If you check your Sent items folder in Outlook you should see that the mail has been sent. Note that each e-mail is sent independently so no one sees all the addresses.

TOP TIP: As mentioned there are a lot of ways to perform a merge, this Microsoft help article: <http://tinyurl.com/2dy46g> is particularly useful. If you add a Category to your Outlook Contacts - see the bottom left of a contact details window in Outlook - this can be a very useful way of grouping your contacts: e.g. managers, technicians, clerical etc... So you can easily mail merge to all managers for example. One person can belong to several categories. The example shown on this web link initiates the mail merge from Outlook which allows greater flexibility selecting recipients.

TIP: If you just want to send the same *non personalised* e-mail to many people in your Outlook Contacts this is **not a mail merge**. To do this very quickly go to you contacts view in Outlook (click the button in the left panel), click the category heading to select all members of a category or chose individuals by holding the control (Ctrl) key down as you select each person. Once every contact you wish to receive the e-mail is highlighted, click the highlighted area and drag it over to the “Mail” section in the left hand pane. If you haven’t selected too many addresses – **the amount of messages you can send at one go depends on your computer set up check with your IT support** – click OK to any warning message that pops up. All the addresses will appear in the To: field of a new e-mail window. For security purposes (see previous IT Accessed/Ryan Solutions article) you may wish to copy and paste the addresses into the BCC: field instead.



[For more information on e-mail management see further articles on www.itaccesssed.com]

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