

# Using Computers

## Database Module

### Task 9

#### Creating Form Letters

Ever wondered how some of the mail, not to mention junk mail, you receive seems to have been personally written just for you? The answer is 'Mail Merge'. Mail merge is the term used when a letter produced in a word processing document takes information (such as names and addresses) from a database. This means that you can create a filter in access to identify the people you want to write to, save it as a query (just as we did in task four) and then produce one letter. The mail merge function means that when you print the letters each one will have a different name and address! It sounds complicated but it's fairly straightforward.

#### TASK 9

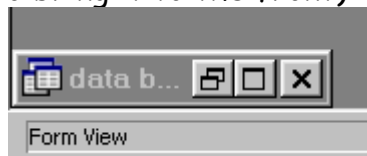
You have identified an area for a recruitment campaign. The Hawk Maintainability department has only a handful of MSF members. In order to lift the profile of the union you have been instructed to write to the members in the department at their home addresses to canvass for one of them to stand as a TU Representative.

Your letter should identify the key roles of a Staff Representative and explain the need to have one in that particular department. Try to use as much information from the database as possible in order to make it look that this person has really been selected from a cast of one! You could, for example, use the 'Date Joined' field in a statement like 'I notice from our records that you joined the union on 12<sup>th</sup> August 1978'. In reality you have not noticed anything because you have not checked any records!!! Good eh!

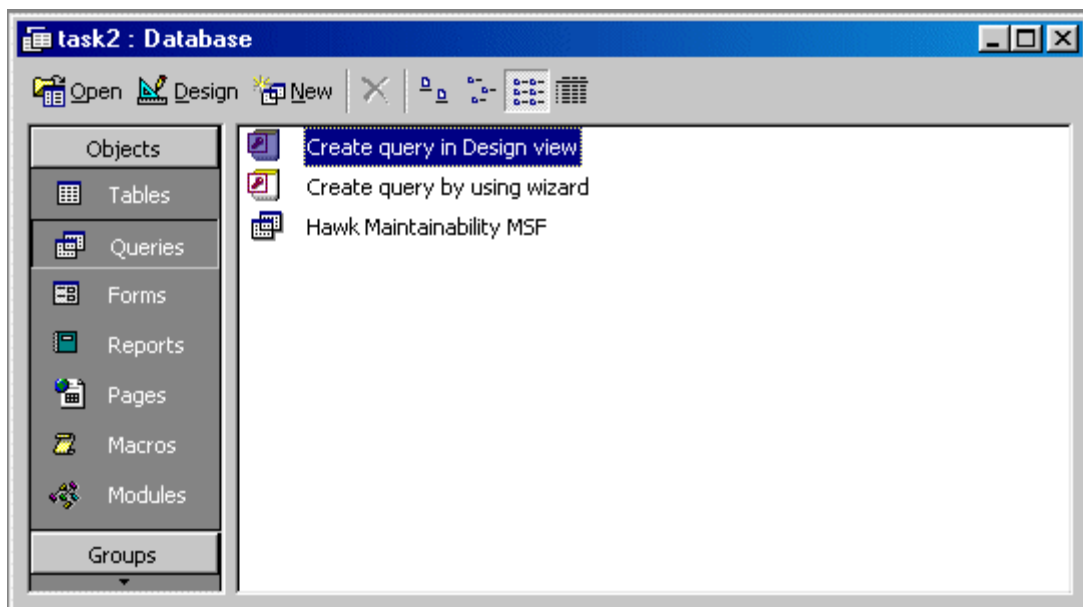
**DO NOT PRINT THE LETTERS UNTIL YOU ARE SURE THAT THE FORM LETTER IS BASED UPON THE CORRECT QUERY AND ONLY FIVE LETTERS WILL BE PRODUCED**

## Methodology

The first thing to do in this task is to open the database 6 and use Filter by Form to find the MSF members in Hawk Maintainability. Save this filter as a query called Hawk Maintainability MSF. (Look back at your notes from task 7 if you can't remember how to do this). Look for the database window at the bottom left of the screen and restore it (this may be behind your main form, if it is just click on any part of the window you can see to bring it to the front)



When you have the window restored click on the Queries option in the column on the left of the panel. You should see your new query listed, there may be others that you have created before.

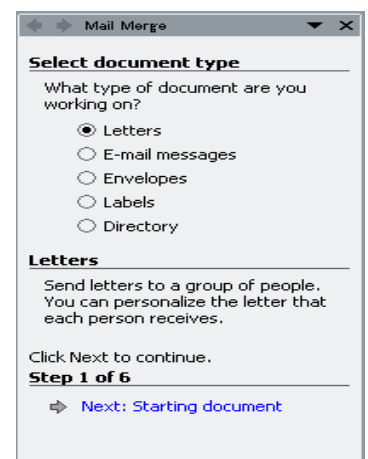


You can now close Access completely and open up Word.

Before you start your letter we will need to make a link between the Word document and the Access database.

Step 1: Select Tools+ Letters and Mailings + Mail Merge Wizard. A Wizard is a guide which will take you through to achieving your goal. A task pane should then be display on the right hand side, like this →

If the task pane step 1 does not appear, right click on Format and select Task Pane.

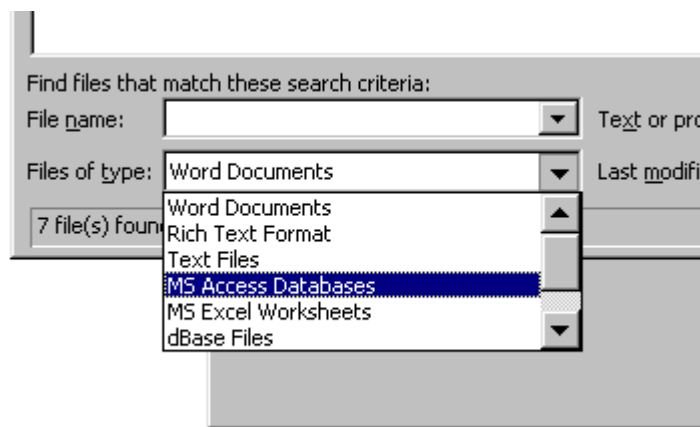


In this task pane step 1, select letters. Then lower down the screen click Next: starting document.

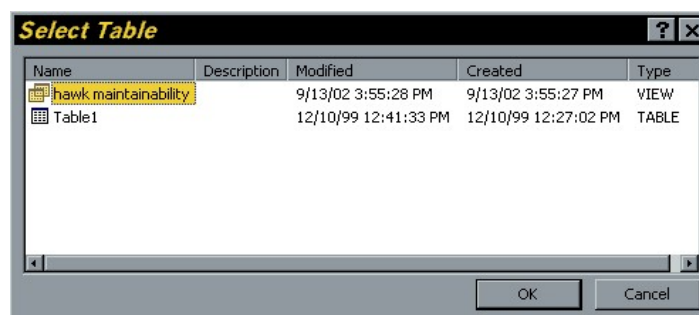
**Step 2:** Select the current document and then select Next: Select recipients.

**Step 3:** Select an existing list. Lower down that column, click Browse. You are now going to telling the computer where your data is stored. The Select Data Source window will appear on your screen. Here tell the computer where your data is stored.

Next to the Look in: box, click the downward arrow and select 3 ½ floppy (A). Further down click the downward arrow box to the right of the File of type: Select Access Database.



You can now look for your database (task 6). Select it and click Open. Word looks at the database and presents a panel for you to select with a table of a query within the database.



From the above panel, select the query you have made (hawk maintainability) and then click OK.

A Mail Merge Recipients panel appears showing a list of names, address's etc of where the letter is going to be sent. Click on Select All and then OK.

Word has now made a link and is ready to start producing your letter.

**Step 4: Producing the letter**

There are several ways of producing the letter, either

- continuing with the task pane within Word or
- using the mail merge toolbar that should appear at the top of the screen.

Since Office XP has introduced a task pane, I hope you don't mind, but I will take you through it. Once mastered, have a go at using the toolbar on another query.

Start your letter by putting your name and address at the top right hand side of the paper

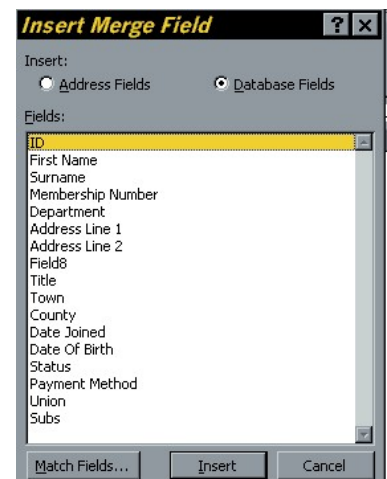
**Producing the letter**

Start the letter by putting your name and address at the top right hand side of the paper. When you come to putting the recipients name and address in select more items

 More items...

A panel like this will appear →

This gives you a list of all of the fields available. Select title first. Then click either double click or click insert. Notice how the field name comes into the document like this: <<Title>>. Press space and then repeat the process for the first name and then the surname field. Now press Enter to drop onto the next line and then click onto more items form the task pane. Continue this for all of the address fields. It should look something like this:-



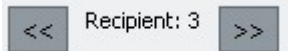
```
<<Title>> <<First_Name>> <<Surname>>
<<Address_Line_1>>
<<Address_Line_2>>
<<Town>>
<<County>>
```

You can use these fields anywhere within your document. Continue with your letter and save it as DB-task9.doc.

When you have finished your letter, click Next: Preview your letter.

**Step 5: Preview your letter**

On the main screen you will see that the data and your fields have been merged.

Using the  you can then view the individual letters.

When your letter is ready for printing, move to step 6.

**Step 6: Complete the merge**

In the task pane click Print. Make sure that there is a dot against All and then click OK.

Note: If you ever need to refer to any of the sections within the task pane use the ← or → arrows in that window.