

# *PineSoft Professional Training Database*

## *Use of Microsoft Word Mail Merge to Create Customised Compact Reports Word 2002 / XP Procedure*

### **Introduction**

The standard PineSoft Placement > Summary (Compact) report orders records by Course, Session, Year, and Placement and generates a new page for each course. If there are a large number of courses, with few placements per course the report will take quite a large number of pages. Using the Microsoft Mail Merge - Directory option it is possible to produce customised, more compact output to suit individual requirements listing ANY PineSoft fields. We will produce a report of the form :

#### *Sample Placement Report using Directory Mail Merge Option*

<i>Course</i>	<i>Student</i>	<i>Supervisor</i>	<i>Company</i>
MATHS	Clark, Stewart	Dr Gary McPherson	Building Research Establishment
Etc.			

### **Procedure**

#### **(1) To Export Data from PineSoft**

Open PineSoft and use the “**Export List**” option to export all (or required) placement data to a file with name merge\_placement.txt

#### **(2) To Create the Mail Merge Document in Word**

Load Microsoft Word (starting with the default blank document)




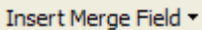
use **Page Setup** and set all margins to 2 cm and choose Landscape mode.

( Use **View > Toolbars** to check that the Mail Merge Toolbar is ticked.) If the “**Insert Merge Field**” option does not appear in the toolbar, add it via the Add Buttons option – you need this to enter PineSoft fields.

You should see the “Mail Merge Toolbar” displayed below



You may use the Toolbar buttons or the Mail Merge Wizard to create the document. This handout will use the Toolbar buttons.

- 1 Click  (Main document setup) and select document type – Directory
- 2 Click  (Open Data Source) browse & select as data source – merge\_placement.txt
- 3 Click  (Mail Merge Recipients) if you require to sort or select a subgroup
- 4 Create your letter/report using  to insert PineSoft fields :

Insert a Table with 1 row and 4 columns in row 1 of the document. Insert the pinesoft fields course, studname, supervisor and company into each cell, via the drop-down lists. Adjust the column widths to give more room for the company details, as shown below.

<<course>>	<<studname>>	<<supervisor>>	<<company>>
------------	--------------	----------------	-------------

If you don't want the borders to appear around Table cells, select the Table and use the **Format > Borders and Shading..** commands to switch borders off.

To insert a Report Title / Header use

### **View > Header and Footer**


And insert a centred header “Sample Placement Report using Directory Mail Merge Option” and column headings for course, student, supervisor and company, as shown below. { Tip : use a Table for easy column width adjustment. }

#### ***Sample Placement Report using Directory Mail Merge Option***

<b><i>Course</i></b>	<b><i>Student</i></b>	<b><i>Supervisor</i></b>	<b><i>Company</i></b>
----------------------	-----------------------	--------------------------	-----------------------

Use bold, italic for the above header text.

Refer to the output attached to this handout and create a similar format. The first output shows the use of PineSoft merge fields such as <<Course>> and the use of tables to align contact details. In the final output the table borders have been switched off to show the final merged report.

**5 Click**  **(View Merged Data)** to toggle between field & preview mode

**Click**  to navigate and preview records

**6 Use File>Save as** to save this report with name Report\_Placement\_XP.doc

**7 Click**  **(Merge to New Document)** or  **(Merge to Printer)** to output your mail merge document, as required.

## NOTES

1. To adjust the layout of Headers, column width's, landscape or portrait format etc you can return to the saved report Report\_Placement\_XP.doc, make the adjustments and repeat step 7 above until you are happy with the results.
2. To re-use a created report at some later time, it is simply a matter of exporting the required data from PineSoft to overwrite the file merge\_placement.txt and the report Report\_Placement\_XP.doc) will automatically display the updated data.

***Sample Placement Report using Directory Mail Merge Option***

<b><i>Course</i></b>	<b><i>Student</i></b>	<b><i>Supervisor</i></b>	<b><i>Company</i></b>
MATHS	Clark, Stewart	Dr Gary McPherson	Building Research Establishment
COMP	Daly, Louise	Mr James Nicoll	Perth & Kinross District Council
MATHS	Darwin, John	Dr Jim Harris	British Geological Survey
MATHS	Davis, Joe	Mr Jim Bett	Angus District Council
MATHS	Davis, Joe	Mr Jim Bett	Angus District Council
COMP	Davis, Steve	Mr Jim Bett	Angus District Council
MATHS	Donald, James	Dr Alan Carter	Transport & Road Research Lab.
MATHS	Donald, James	Mr Jim Steven	Conoco UK Ltd
MATHS	Donald, Louise	Dr Mike Drysdale	GEC Electromotors Ltd
MATHS	Donald, Louise	Dr Freda Main	Building Research Establishment
COMP	Donald, Stephen	Dr George Simpson	Scottish Office
MATHS	Fagan, Joe	Mr Barry Douglas	Perth & Kinross District Council
MATHS	Fagan, Joe	Dr R Fitzgerald	Home Office
MATHS	Fraser, Fred	Mr Brian Walters	Conoco UK Ltd
MATHS	Fraser, Fred	Dr Gerald Milne	Shell UK
COMP	Fraser, Joanna	Mr James Nicoll	Perth & Kinross District Council
MATHS	Glen, Susan	Dr Jim Harris	British Geological Survey
MATHS	Glen, Susan	Dr Gary McPherson	Building Research Establishment
COMP	Hally, Steve	Mrs Susan Wilson	Fife Regional Council
MATHS	Hammond, Alex	Dr Bill Smith	MOD Defence Operational Est.
MATHS	Hammond, Alex	Miss Shona Dent	Fife Regional Council
MATHS	Ingram, Brian	Mr Jim Bett	Angus District Council
MATHS	Jones, Ronald	Mr Alan Richards	Highland Regional Council
MATHS	Jones, Ronald	Mr Colin McNab	Ferranti Ltd
COMP	Jones, Sarah	Dr George Simpson	Scottish Office
MATHS	Jordan, Lisa	Dr Donna Hamilton	Building Research Establishment
MATHS	Jordan, Lisa	Dr John Morris	National Engineering Laboratory
MATHS	Keith, Andy	Mr Jim Bett	Angus District Council
MATHS	Keith, Andy	Dr John Gray	Transport & Road Research Lab.
MATHS	Milne, Adam	Dr Gerald Milne	Shell UK

*Sample Placement Report using Directory Mail Merge Option*

<i>Course</i>	<i>Student</i>	<i>Supervisor</i>	<i>Company</i>
MATHS	Milne, Adam	Mr Colin McNab	Ferranti Ltd
COMP	Murray, John	Mrs June McColl	Bett Brothers Plc
MATHS	Patel, Joe	Dr Laura Hunter	DHSS
MATHS	Patel, Joe	Dr Bill Smith	MOD Defence Operational Est.
MATHS	Smart, Susan	Dr Mike Drysdale	GEC Electromotors Ltd
MATHS	Smith, Andy	Dr Reg Wilson	Scottish Office
MATHS	Smith, Andy	Dr Reg Wilson	Scottish Office
MATHS	Smith, Joe	Mr Jim Barker	Ferranti Ltd
MATHS	Smith, Joe	Dr Laura Hunter	DHSS
COMP	Smith, Mark	Mr Jim Walker	Central Regional Council
MATHS	Soutar, Colin	Mrs Freda Watt	Bett Brothers Plc
MATHS	Soutar, Colin	Dr Brian Salter	Transport & Road Research Lab.
MATHS	Thompson, Heather	Mr Alan Richards	Highland Regional Council
COMP	Watkins, Justin	Mr James Nicoll	Perth & Kinross District Council
MATHS	Welsh, Alison	Mr Philip Jones	Transport & Road Research Lab.
MATHS	Welsh, Alison	Dr Andrew Field	GEC Electromotors Ltd