

PineSoft Professional Training Database

Use of Microsoft Word Mail Merge to Create Customised Compact Reports Word 2007 / 2010 / 2012 Procedure

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

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

Procedure

(1) To Export Data from PineSoft

Open PineSoft and use the **third** "Export List" option to export all (or required) placement data to an Excel file with name merge_placement.xlsx

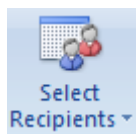
(2) To Create the Mail Merge Document in Word

Load Microsoft Word (starting with the default blank document, or open a New document)

use the "**Page Layout**" tab and set all margins to 2 cm, with a Landscape Orientation.

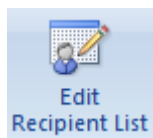


In the "**Mailings**" tab click on and select the "Directory" option

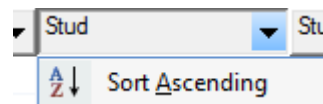


In the "**Mailings**" tab click on and select "Use Existing List"

- browse to the location of the PineSoft exported file : merge_placement.xlsx and select and open it.

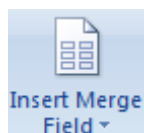


{In the "**Mailings**" tab click on and then sort on :



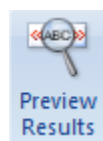
Save this report with name Report_Compact.docx - you can save it again when complete.

Next : Refer to the output attached to this handout and create a similar format. The first two rows are created on the page header - the third row is the one which will be repeated. The first output shows the use of PineSoft merge fields such as <<Course>> and the use of tables to align contact details.



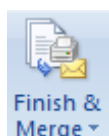
To enter PineSoft field names click on :

NOTE : In the final output the table borders have been switched off to show the required output.

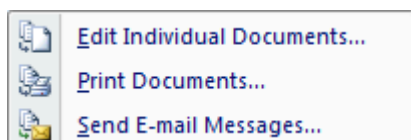


When complete, to preview your report click on and browse through the records.

Finally : Complete the merge

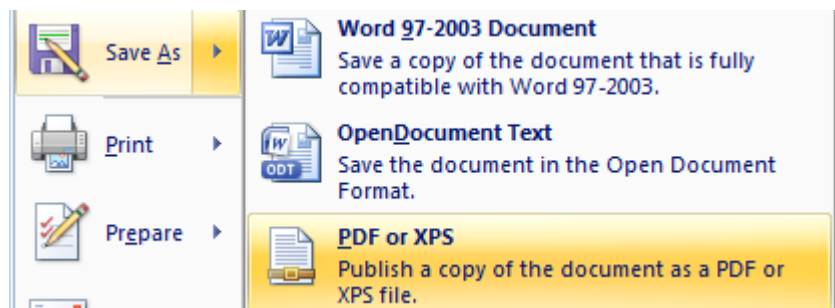


Click on and choose from



- use "Edit Individual Documents..." to select required records and preview results before printing.

- then you may use **"Save As" > "PDF or XPS"** to produce a pdf document or **"Print"** to send to your printer, as shown below :



NOTES

To adjust the layout of the report you can return to the saved report Report_Compact.docx, make the necessary adjustments and repeat the above steps until you are happy with the final results.

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.xlsx and the document Report_Compact.docx will automatically display the updated data.

Mail Merge Document Report Format

NOTE : Top two rows created in page header, only one row in report - use tables to format / align :

Sample Placement Report using Directory Mail Merge Option

Course	Student	Supervisor	Company
<<Course>>	<<Studname>>	<<Supervisor>>	<<Company>>

Switch off table borders and save report as Report_Compact.docx, before completing the merge to produce output, as illustrated below :

Typical Final Output Format

Sample Placement Report using Directory Mail Merge Option

Course	Student	Supervisor	Company
MATHS	Donald, James	Dr Alan Carter	Transport & Road Research Lab.
MATHS	Clark, Stewart	Dr Gary McPherson	Building Research Establishment
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
MATHS	Donald, Louise	Dr Mike Drysdale	GEC Electromotors Ltd
COMP	Donald, Stephen	Dr George Simpson	Scottish Office
COMP	Davis, Steve	Mr Jim Bett	Angus District Council
MATHS	Glen, Susan	Dr Jim Harris	British Geological Survey
MATHS	Jordan, Lisa	Dr John Morris	National Engineering Laboratory
MATHS	Keith, Andy	Mr Jim Bett	Angus District Council
MATHS	Donald, James	Mr Jim Steven	Conoco UK Ltd
MATHS	Fagan, Joe	Mr Barry Douglas	Perth & Kinross District Council
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
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	Keith, Andy	Dr John Gray	Transport & Road Research Lab.
MATHS	Milne, Adam	Dr Gerald Milne	Shell UK
MATHS	Milne, Adam	Mr Colin McNab	Ferranti Ltd