

# ***PineSoft Professional Training Database***

## ***Use of Microsoft Word Mail Merge to Create Customised Reports or Letters Word 2007 / 2010 / 2012 Procedure***

### **Introduction**

Using the Microsoft Mailings Toolbar - Letters option it is possible to produce customised, more flexible output to suit individual requirements listing ANY PineSoft fields. We will produce the report "FORM3(CS)" shown on the last page of sample output in the PineSoft User Manual (before the yellow section break sheet). The output we are going to produce is also attached to this handout for convenience.

### **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 Microsoft Word 2007/2010/2012**

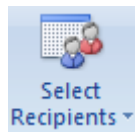
Load Microsoft Word (starting with the default blank document, or open a New document)

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



In the "**Mailings**" tab click on

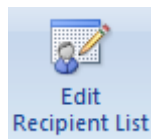
and select the "Letters" option



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.

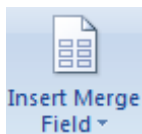


{In the "**Mailings**" tab click on

if you need to sort or edit your data - skip this.}

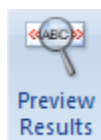
Save this report with name Report\_Form3.docx - you can save it again when complete.

**Next :** Compose your letter, inserting Merge Field values as described below. 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 <<Mailname>> 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.

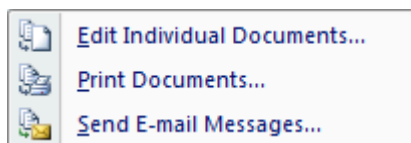


When complete, to preview your report click on and browse through the records.

**Finally : Complete the merge**

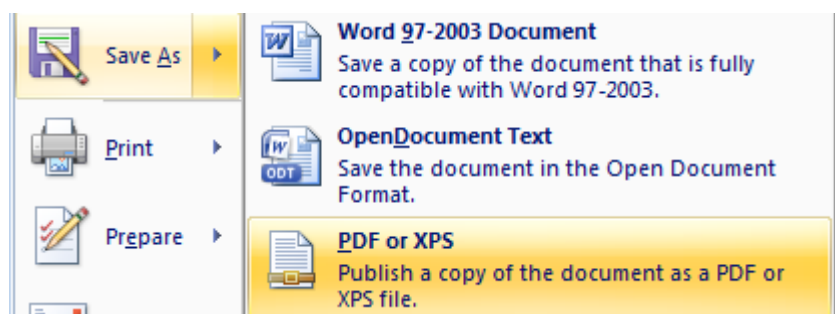


Click on and choose from



- 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\_Form3.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\_Form.docx will automatically display the updated data.

**UNIVERSITY OF ABERTAY DUNDEE**  
**School of Computing & Advanced Technology**  
**Professional Training : Company Report**

<b>Student</b>	«Mailname»	<b>Year</b>	«Yearstu»
<b>Company</b>	«Company» «Street» «Town» «County» «Postcode»	<b>Supervisor</b>  <b>Job Title</b>  <b>Start Date</b>	«Supervisor»  «Supjobtitle»  «Start»

**1. Student's performance - please tick appropriate box :**

	<i>Excellent</i>	<i>Good</i>	<i>Average</i>	<i>Poor</i>
Intellectual ability				
Diligence				
Initiative				
Reliability				
Ability to work with team				
Ability to work on own				
Ability to discuss progress				
Willingness to learn				
Personal behaviour				

**2. Remarks**

**Signature :**..... **Date :** .....

<b>Please return to :</b>	<i>Dr Stuart K Donald, University of Abertay Dundee, School of Computing &amp; Advanced Technology, Bell Street, Dundee DD1 1HG</i>
<b>Tel :</b>	<i>01382 6666666</i>

**UNIVERSITY OF ABERTAY DUNDEE**  
**School of Computing & Advanced Technology**  
**Professional Training : Company Report**

**Student** James Donald

**Year** 2

**Company** Transport & Road Research Lab.  
Old Wokingham Road  
Crowthorne  
Berkshire  
RG11 6AU

**Supervisor** Dr Alan Carter

**Job Title** Research Co-ordinator

**Start Date** 03/04/2009

**1. Student's performance - please tick appropriate box :**

	<i><b>Excellent</b></i>	<i><b>Good</b></i>	<i><b>Average</b></i>	<i><b>Poor</b></i>
Intellectual ability				
Diligence				
Initiative				
Reliability				
Ability to work with team				
Ability to work on own				
Ability to discuss progress				
Willingness to learn				
Personal behaviour				

**2. Remarks**

**Signature** : ..... **Date** : .....

**Please return to :** Dr Stuart K Donald, University of Abertay Dundee, School of  
Computing & Advanced Technology, Bell Street, Dundee DD1 1HG  
**Tel :** 01382 666666