

How to Design a Word Mailmerge Report

Applicable to SIMS Version

7.114 onwards.

Permissions Required

You will need to be a member of any of the following user groups in System Manager to create reports:

Assessment Coordinator, Class Teacher, Pastoral Manager, School Administrator, Senior Management Team, System Manager.

Please see your System Administrator/Manager if you are not sure whether you have the required permissions.

Introduction

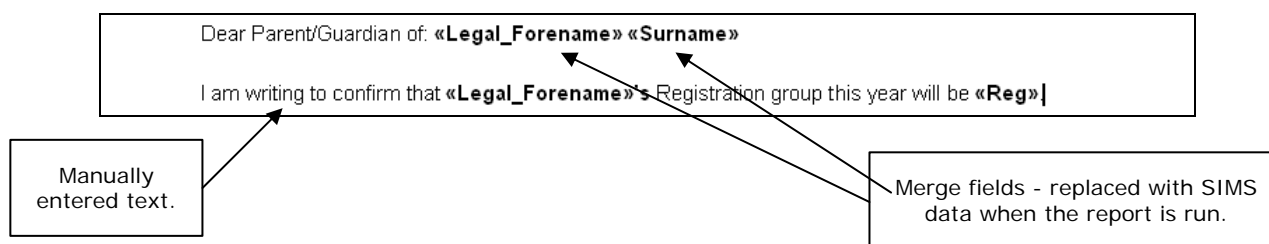
This help sheet describes how to design and produce a Word mailmerge report, together with any associated templates. It assumes that you are familiar with designing simple reports. If this is not the case, please refer to the *How to Design a Simple Report* help sheet (SupportNet Resource Number 11137).

Word mailmerge reports are used to produce a report that merges the content of a document with data from SIMS in order, for example, to produce the same letter to multiple recipients.

An example report is referenced throughout this help sheet, consisting of the following report design:

Fields included in report:	Surname, Legal Forename, Gender, Reg Group and Ethnicity
Report sort order:	Ethnicity
Filters used in report:	Year Group select at run-time (Year 4 selected by default)

The following mailmerge report merges SIMS data from the report design fields inserted, with the text in the report. The following template design shows the manually entered text and the mailmerge fields (in angled brackets).



When the report is run, the resulting output appears as follows (where the mailmerge fields are replaced with the actual data from SIMS):

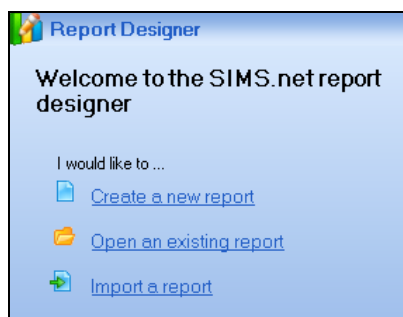
<p>Dear Parent/Guardian of: Isobel Dambora</p> <p>I am writing to confirm that Isobel's Registration group this year will be ELM.</p>
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Designing a Word Mailmerge Report

To design a Word mailmerge report, a mailmerge document that contains the required mailmerge fields, text, formatting, etc. must be created. When the report is run, data from SIMS is merged with the mailmerge document to produce the report.

Once the mailmerge document has been created, it is automatically associated with the report when the report design is saved.

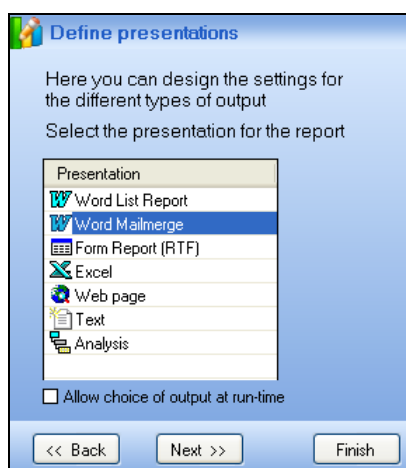
1. Select **Reports | Design** to display the **Report Designer**.



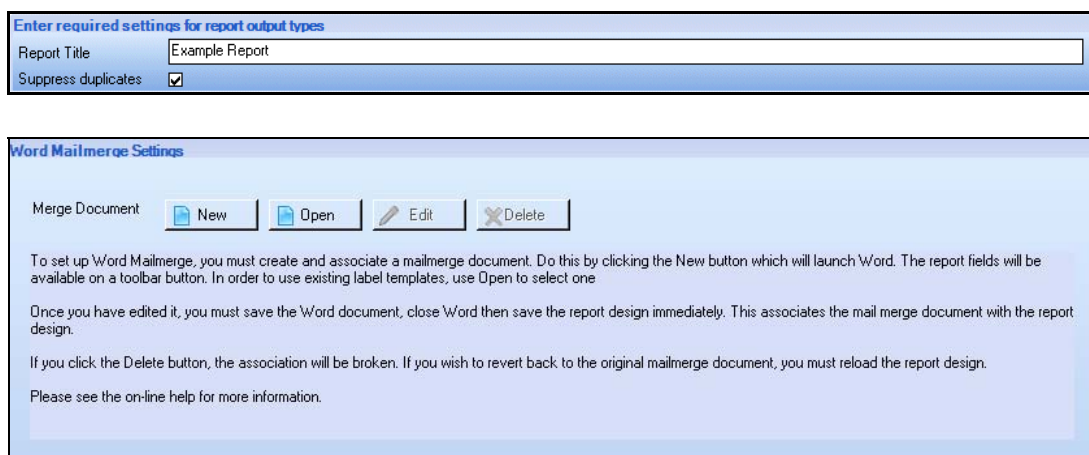
2. Click the **Create a new report** hyperlink to display the **Report Wizard** and **Report Summary**. Choose the fields to be included in the report, together with any filters and sort order. For more information on designing a report, please see the *How to Design a Simple Report* help sheet (SupportNet Resource Number 11137).

<p>Report Summary</p> <p>Report Name: <u>effective on:</u> 22/08/2006</p> <p>● <u>Data area:</u> <u>Student</u> - Population: On roll</p> <p>● <u>Data Fields:</u> Surname, Legal Forename, Gender, Reg group, Ethnicity, Year group</p> <p>● <u>Filter Students</u> where: Year group is Year 4</p> <p>● <u>Use the default sort order:</u> Surname, Legal Forename</p> <p>● <u>Default Output:</u> Word Mailmerge Duplicates suppressed in complex reports Report Title:</p>

- Click the **Default Output** hyperlink in the **Report Summary** panel to display the **Define Presentations** page of the **Report Wizard**.



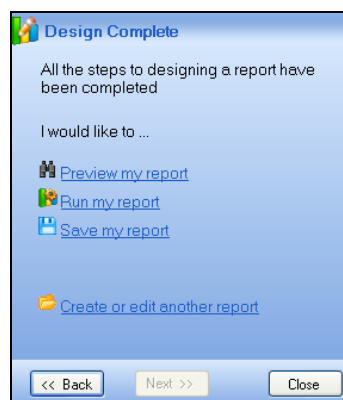
- Select **Word Mailmerge** from the **Presentation** list to display the **Word Mailmerge Settings** panel.



- Enter a title for the report in the **Report Title** field, if required.
- Deselect the **Suppress duplicates** check box only if you want any duplicate records to appear in the report.
- The following options are available:
 - Click the **New** button to create a new mailmerge document (which defines the layout of the mailmerge report) - see *Creating a New Mailmerge Document* on page 4.
 - Click the **Open** button to create a mailmerge document based on an existing mailmerge template. Mailmerge templates are mailmerge documents that have been used in previous mailmerge reports and have been saved as templates for re-use - see *Creating a Mailmerge Document Using an Existing Mailmerge Template* on page 6.
 - Click the **Edit** button to edit an existing mailmerge document, enabling you to edit the layout of the mailmerge report. This option is only available if a mailmerge document has already been created and attached to this report design - see

Editing an Existing Mailmerge Document on page 9.

- ▶ Click the **Delete** button to delete a previously attached mailmerge document (only available if a mailmerge document has already been attached to this report design) - see *Deleting a Mailmerge Document* on page 9.
8. Once the required option has been selected and the mailmerge document created/edited as required, click the **Next** button on the **Report Wizard** to display the **Design complete** page.

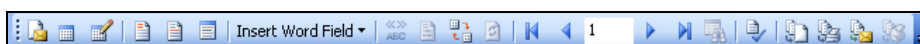


9. Preview, run or save the report as required by clicking the applicable hyperlink.

Creating a New Mailmerge Document

The mailmerge document that is associated with the report design enables you to determine the layout of the report and to identify which fields of SIMS data will appear in the final report (achieved by inserting mailmerge fields).

1. From the **Word Mailmerge Settings** panel, click the **New** button to create a new mailmerge document.
2. A blank Word document automatically named `ReportMailmerge.doc` is opened, containing an additional mailmerge toolbar.



3. Enter the required text, graphics, etc. into the document. This content will be repeated for every record included in the report design, e.g. for every pupil/student.

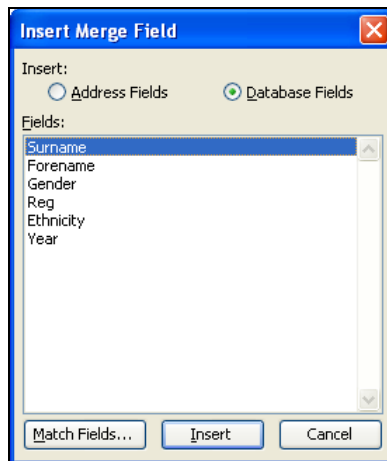
Dear Parent/Guardian of:

4. SIMS data is included in the report by inserting mailmerge fields into the mailmerge document. This is achieved by positioning the cursor where the field should be inserted, then clicking **Insert Merge Fields** button on the toolbar.



Insert Merge Fields button

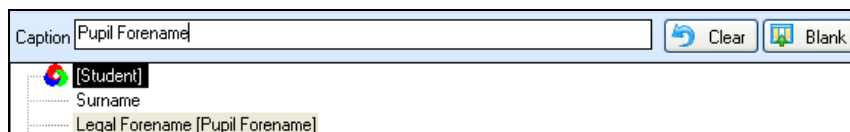
5. The **Insert Merge Field** dialog is displayed listing all the available mailmerge fields (all the SIMS fields included in your report design). Highlight the required field and click the **Insert** button.



NOTE: If the required field is not listed, it has not been included in the report design. You will need to save and close the mailmerge document (by clicking the **Save** button on the toolbar), add the required field to the report design, then edit the mailmerge document as described in

Editing an Existing Mailmerge Document *on page 9.*

TIP: The names of the merge fields displayed in the **Insert Merge Field** dialog are taken from the field name captions in the SIMS report design. To make it easier to identify some of these fields, you may prefer to edit the captions in the report design. The following example shows that the pupil/student **Legal Forename** has been renamed to **Pupil Forename**.



6. Once inserted, the merge field is displayed in the document in angled brackets, e.g. <<Legal_Forename>> as shown in the following graphic:

Dear Parent/Guardian of: «Legal_Forename»

NOTE: If the field caption has been renamed as described in the earlier tip, the field will appear as <<Pupil_Forename>>.

7. If no spaces or punctuation are required, continue to add merge fields as required. If you need to add punctuation (such as spaces), further text, etc. or you need to move to a different location in the document, click the **Cancel** button on the **Insert Merge Field** dialog to return to the document. Make the necessary changes, then insert more merge fields as described in steps 4 to 5.

Dear Parent/Guardian of: «Legal_Forename» «Surname»

8. Once you have inserted all the required merge fields, format the document as required, noting that merge fields can be formatted in the same way as normal text.
9. Click the **Save** button on the toolbar and close the mailmerge document. Return to SIMS and save the report design in the usual way. This attaches the mailmerge document to the report design, which is saved at the same time.

Creating a Mailmerge Document Using an Existing Mailmerge Template

There may be occasions when you want to base the design of your mailmerge document on an existing template, either saved from a previous mailmerge report design, or one supplied by Capita Children's Services.

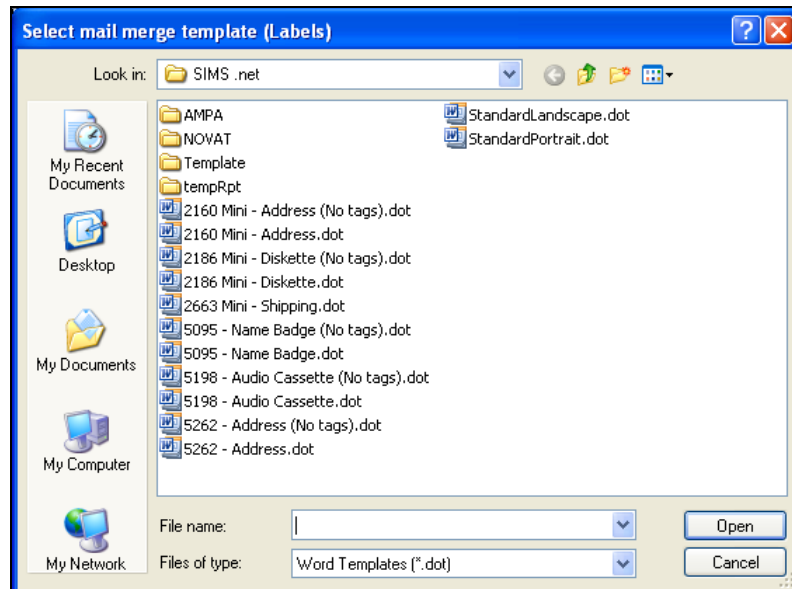
WARNING: If you have previously attached a mailmerge document to this report design, opening an existing mailmerge template will overwrite the currently attached document. If you want to save the current document, click the **Edit** button then follow the instructions in Saving a Mailmerge Document as a Mailmerge Template on page 7.

As with all types of template, it is strongly recommended that master copies of templates are stored in a safe location. This is particularly important if multiple users have access to these templates.

1. From the **Word Mailmerge Settings** panel, click the **Open** button. If a document is already attached to this report design, a message dialog is displayed asking if you wish to overwrite the existing document. Click the **Yes** button.



2. The **Select mailmerge template** dialog displays a list of available templates. Navigate to an alternative location, if a previously defined mailmerge template has been saved elsewhere.



3. Select the required template then click the **OK** button. Microsoft Word opens with a new mailmerge document based on the selected template.
4. Add any further text, graphics, formatting and insert merge fields as described in *Creating a New Mailmerge Document* on page 4.
5. Once the required design has been achieved, click the **Save** button on the toolbar and close the mailmerge document. Return to SIMS and save the report design in the usual way to attach the mailmerge document to the report design.

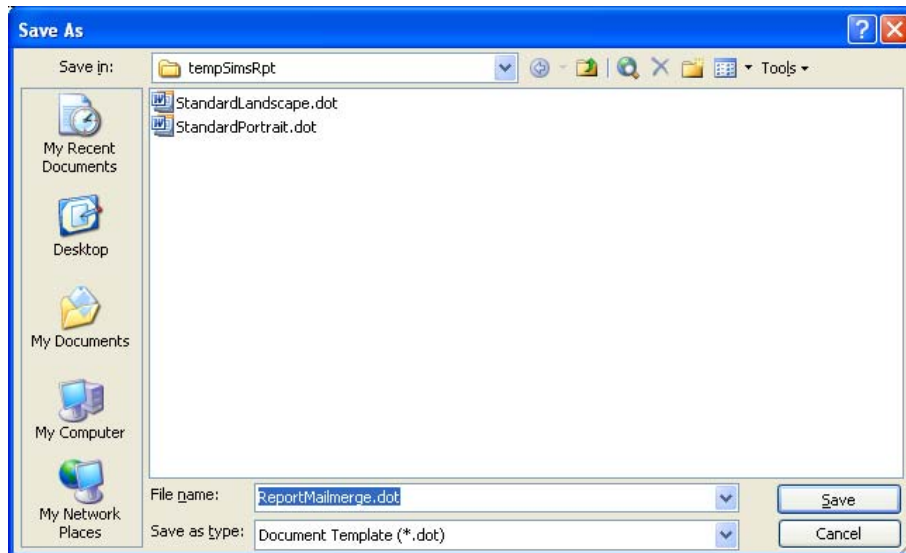
The original mailmerge template will remain the same, unless you elect to save it as a mailmerge template.

Saving a Mailmerge Document as a Mailmerge Template

Any mailmerge document created for a mailmerge report can be saved for reuse. This is achieved by saving the document as a mailmerge template. Saving mailmerge documents as mailmerge templates enables subsequent mailmerge documents to be created based on an existing template, saving time when re-designing similar content.

For example, you could create a mailmerge document that contains your school logo, address, text for a standard letter, together with the relevant standard SIMS mailmerge fields (such as pupil/student Surname, Forename, Address, etc.). Saving this document as a template would enable similar pupil/student letters to be created, which contain the same content from the template with perhaps one or two different lines in the letter.

1. Create the mailmerge document as described in *Creating a New Mailmerge Document* on page 4.
2. Instead of clicking the **Save** button on the Word toolbar, select **File | Save As** to display the **Save As** dialog.



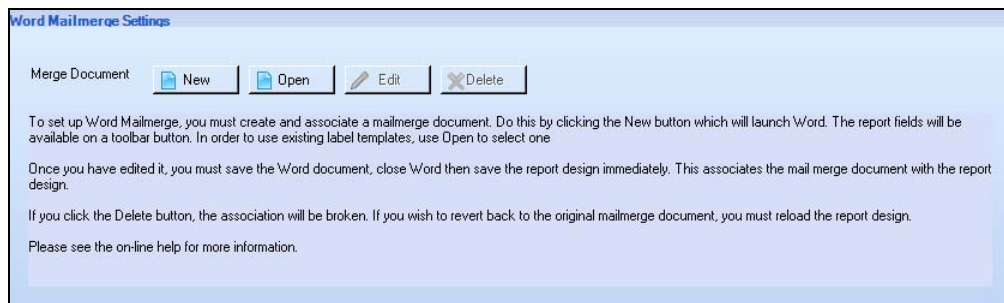
3. The template is given a default name of `ReportMailmerge.dot` which should be renamed to easily identify the content of the template, e.g. `standard_letter.dot`.
4. By default, the mailmerge templates that you create are stored in your `\My Documents\tempSimsRpt` folder. It is recommended that the template is saved in `\Program Files\SIMS\SIMS .net`. This ensures that your template appears in the same list as those supplied by Capita Children's Services and also ensures that it is not inadvertently overwritten.
5. Click the **Save** button to save the template to the chosen location.

Editing an Existing Mailmerge Document

Any existing mailmerge document attached to a report design can be easily edited.

WARNING: Once the edited mailmerge document and report design are saved, the previous mailmerge document is overwritten and is permanently lost. If you want to save the existing mailmerge document for re-use, open it and save it as a template as described in the previous section.

1. From the **Word Mailmerge Settings** panel, click the **Edit** button. Microsoft Word opens with the associated mailmerge document displayed.



2. Add/edit text, graphics, formatting and insert additional merge fields.
3. Click the **Save** button on the Word toolbar, then close Word.
4. Switch back to SIMS and save the report design. The edited mailmerge document will be saved and associated with the report design.

Deleting a Mailmerge Document

To break the association with the current mailmerge document, click the **Delete** button on the **Word Mailmerge Settings** panel. You will subsequently need to create another mailmerge document before the mailmerge report output can be successfully produced.

More Information

- Reporting in SIMS handbook.
- How to Design a Simple Report help sheet (SupportNet Resource Number 11137).
- How to Preview Reports help sheet (SupportNet Resource Number 11138).
- How to Run Reports help sheet (SupportNet Resource Number 11125).
- How to Save or Delete Reports help sheet (SupportNet Resource Number 11136).

All handbooks can be accessed from the SIMS **Documentation Centre** which is launched by clicking the **Documentation** button on the **Home Page** in SIMS. Once open, click the **Handbooks** button, select the required handbook category then select the required handbook from the **Handbooks** page.

A sample selection of help sheets is also available from the **Documentation Centre** by clicking the **Help Sheets** button. All available help sheets can be obtained from our SupportNet Home page (<http://support.capitaes.co.uk>) by clicking the **Documentation** button, then selecting **Help Sheets** from the **Categories** drop-down list.

Providing Feedback on This Help Sheet

If you have any suggestions or comments about this or any of our other help sheets, please email helpsheets@capita.co.uk.

Revision History

Version	Change Description	Date
HS1070-01	Initial Release.	14/02/06
HS1070-02	Updated to reflect SIMS .net new look released with 7.78 plus some general improvements to text.	22/08/06
HS1070-03	Updated cross references with new documentation location.	10/11/08
HS1070-04	Corrected the location of the default folder in which mailmerge templates are saved together with general improvements to text.	05/05/09