

WASWUG 2008

Creating

A

Permanent Record Card

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of



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TABLE OF CONTENTS

Introduction.....	3
Create the Data Mining Report.....	4
Create the Mail Merge Document.....	5
Use the Data Mining /Mail Merge Document	9
Sample Merge Template.....	10
Sample Merged Record.....	11

Introduction

This document will demonstrate some basics for creating a merge template through data mining; MSWORD.

Prior to merging a document it is necessary to create the data mining report with the fields desired for the merge and the template for the merge document. After these two pieces are created the merge process can be run.

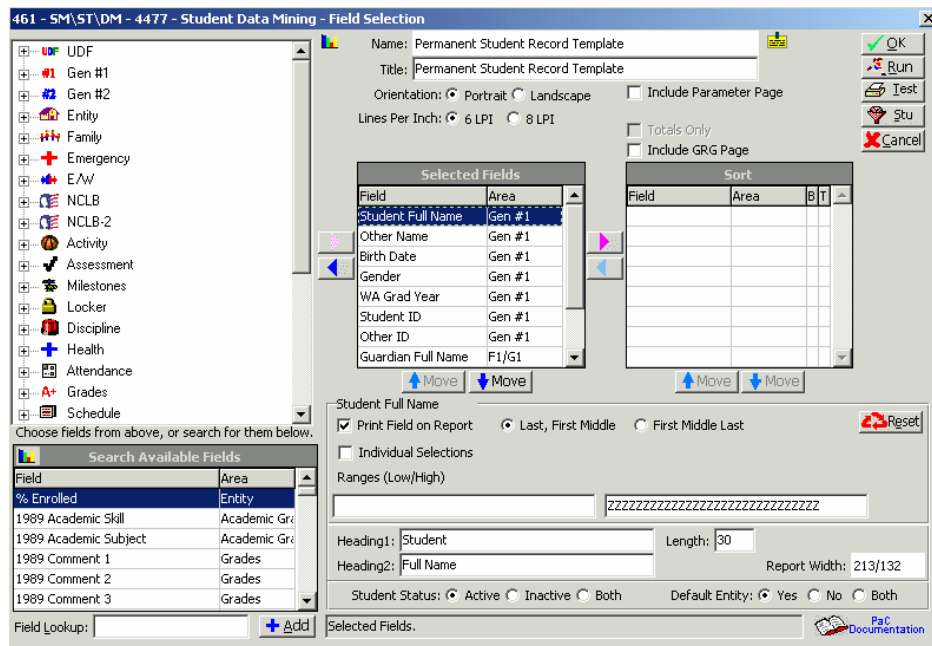
Create the Data Mining Report

Menu Path: Student Mngmnt/Data Mining
or
Student Mngmnt/Student/Student Data Mining

1. Click on **Add**
2. Name and Title the Data Mining Report
3. Select the Fields needed for the merge document

The example uses the following eleven fields:

Field	Area
Student Full Name	Gen #1
Other Name	Gen #1
Birth Date	Gen #1
Gender	Gen #1
WA Grad Year	Gen #1
Student ID	Gen #1
Other ID	Gen #1
Guardian Full Name	F1/G1
Street Address	F1
City State Zip	F1
Entry Date	E/W

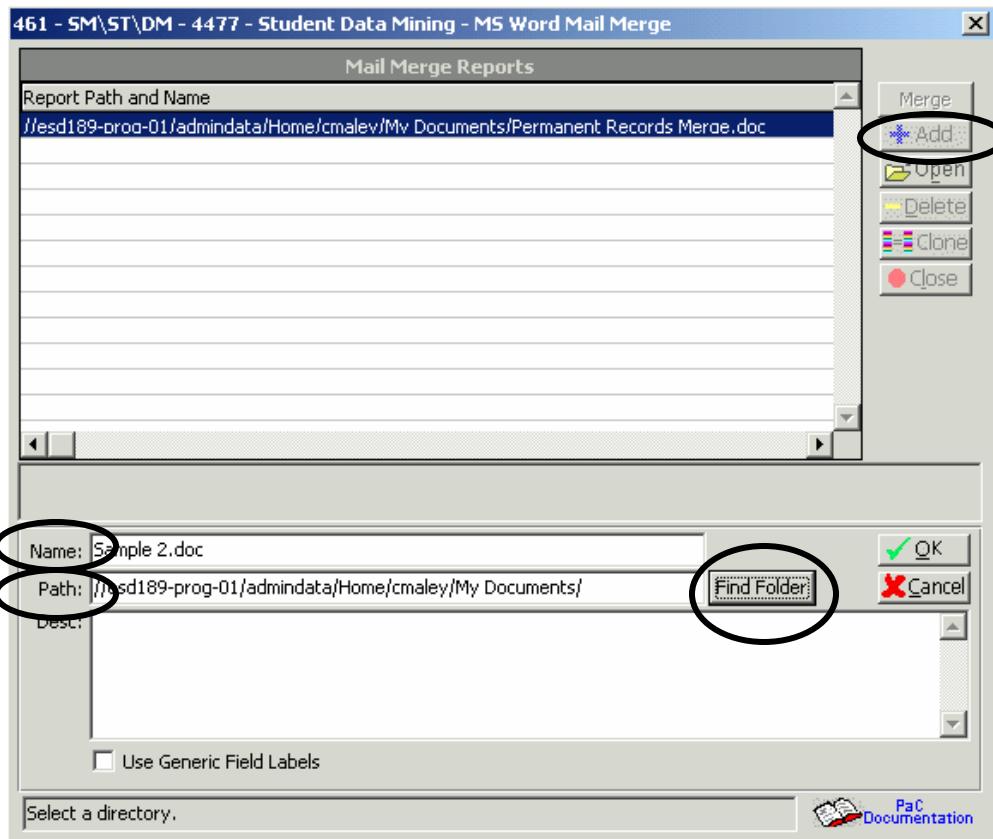


4. Click **OK** to close the report.

Create the Mail Merge Document

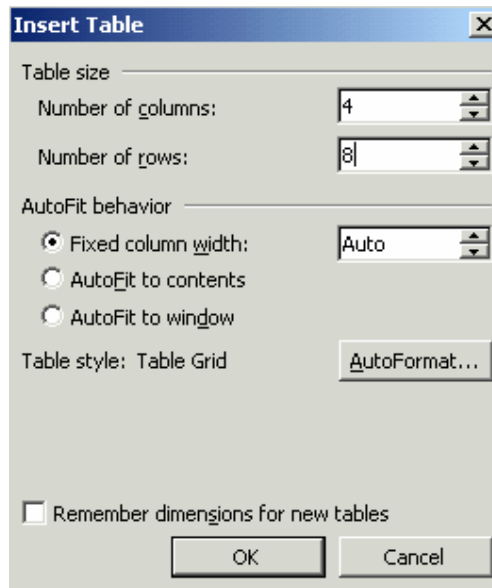
Menu Path: Student Mngmnt/Data Mining
or
Student Mngmnt/Student/Student Data Mining

1. Highlight the Report created in Data Mining for the Permanent Student Record
2. Click on **Run**.
3. Click on **MS Word**.
4. Click on **Add**.
5. Select **New Document**.
6. Name the File
7. Type in a path to store the file or click on Find Folder and Select a path (recommend that it is stored in My Documents in Citrix)



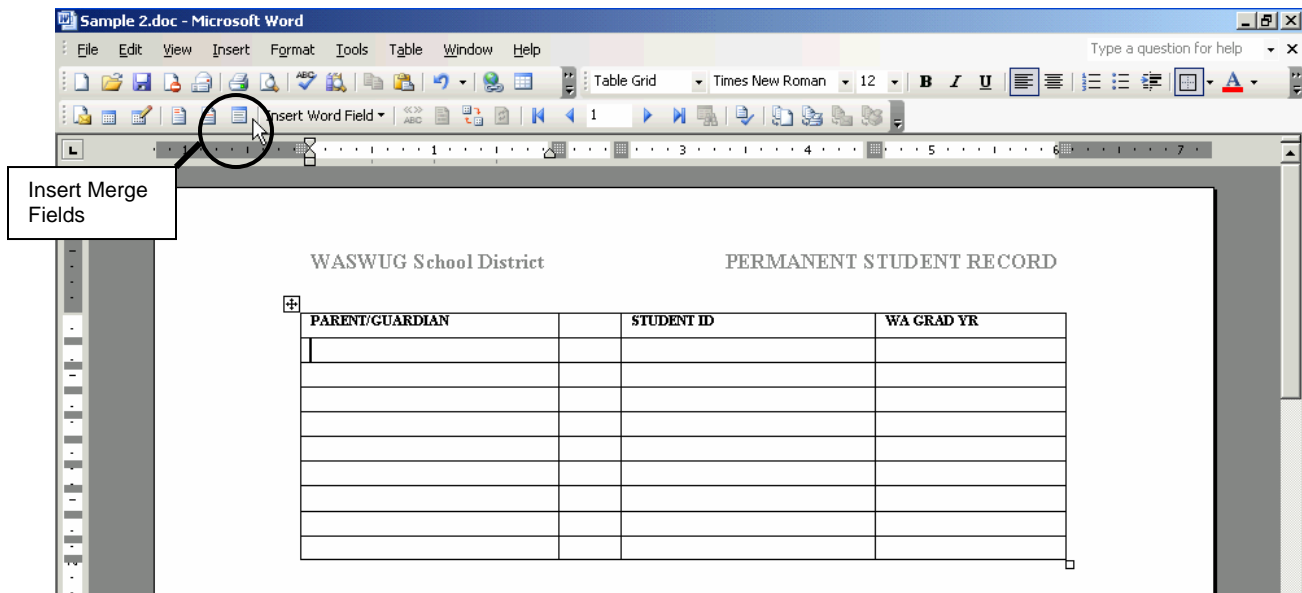
8. Click **OK**. A blank Word Document will open.
9. Create your Template with merge fields.
10. The Font used in the example is Times New Roman. The first line containing the School District Name and the title "Permanent Student Record" was placed in the Header of the word document., (Path: View / Header and Footer).

11. The example document uses a table to keep all the merge fields and headings lined up consistently. (Path: Table / Insert / Table - 4 columns by 8 rows).

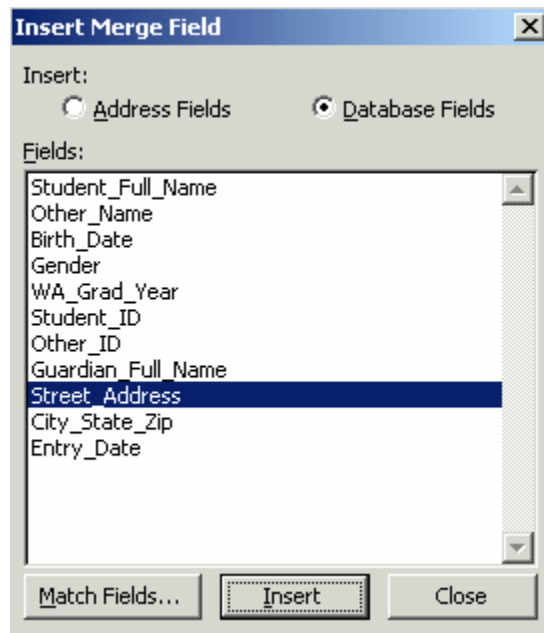


12. The font size used for the headers in the table is 8pts.

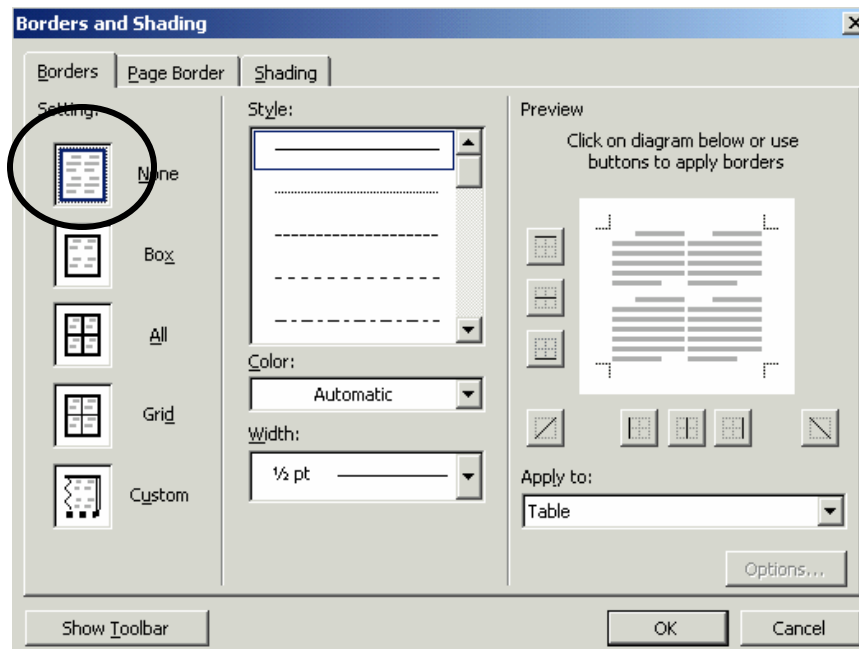
13. Place the cursor in the correct position for the merge field then use the “**Insert Merge Fields**” button to access the merge field.



14. Highlight the desired Merge Field click **Insert**.

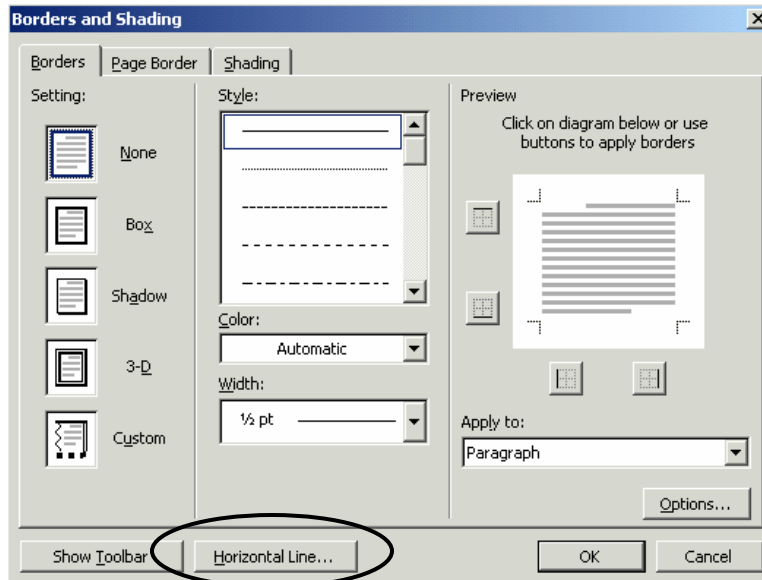


15. Click **Close**
16. Then reposition the cursor for the next merge field and repeat steps 14 & 15.
17. There is space for a small logo to the right of the Legal Name if desired.
18. After the table is created highlight the whole table go to Table (in the menu bar) select Table Properties, then select **Borders and Shading...** select **None** (to hide the gridlines of the table).



19. Click **OK**.
20. Click **OK**.
21. Create a hard return after the table

22. Select Format from the Menu bar.
23. Select Borders and Shading from the drop down list.
24. Select **Horizontal Line. . .** from this screen.

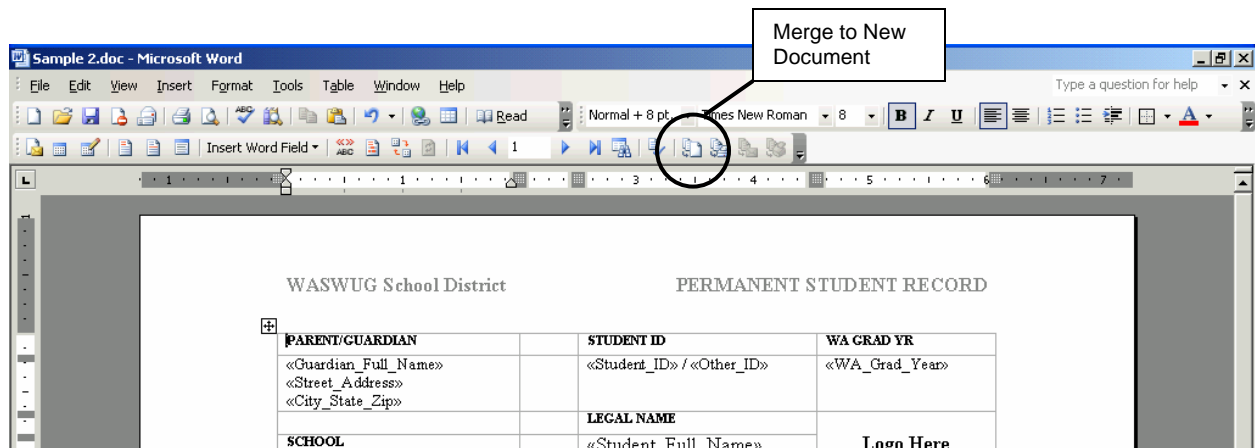


25. Select the line (the example used the first one). The line can be formatted after it is selected.
26. After the Line Type the word **PHOTOS**.
27. Then create several hard returns to create blank space.
28. Create another horizontal line by repeating steps 22 through 25.
29. After the Line Type the word **TEST SCORES**.
30. Then create several hard returns to create blank space.
31. Type **Additional Test Scores Continued on Back**.
32. Create another Table at the bottom. Follow the path in step 11. This time the table in the example is 3 columns by 7 rows.
33. Enter the text in the table for Transfer Record To/Date and Transcript Sent to Name/Date.
34. Save and Close the File.
35. **Close**.
36. **Close**.
37. **Close**

Use the Data Mining /Mail Merge Document

Menu Path: Student Mngmnt/Data Mining
or
Student Mngmnt/Student/Student Data Mining

1. Highlight the Data Mining Report created for the Merge.
2. Click on **Run**.
3. Click on **MS Word**.
4. Highlight the Mail Merge Report to use.
5. Click on **Merge**.
6. Click on the tool bar option for "Merge to New Document.



7. Verify the selection for the merge is set to **All**.
8. Click on **OK**.
9. Print information as desired.
10. Close File (without saving).
11. Close template (without saving)
12. **Close**.
13. **Close**.
14. **Close**

Sample Merge Template

WASWUG School District

PERMANENT STUDENT RECORD

PARENT/GUARDIAN
 «Guardian_Full_Name»
 «Street_Address»
 «City_State_Zip»

STUDENT ID
 «Student_ID» / «Other_ID»

WA GRAD YR
 «WA_Grad_Year»

LEGAL NAME
 «Student_Full_Name»

SCHOOL

DISTRICT CO. NUMBER
 WASWUG High School
 2121 W. Casino Rd
 Everett, WA 98204

AKA
 «Other_Name»
BIRTHDATE **GENDER**
 «Birth_Date» «Gender»

ENTRY DATE
 «Entry_Date»



PHOTOS

TEST SCORES

(Additional Test Scores Continued on back)

TRANSFER RECORD		TRANSCRIPTS SENT TO:			
TO	DATE	NAME	DATE	NAME	DATE

Sample Merged Record

WASWUG School District

PERMANENT STUDENT RECORD

PARENT/GUARDIAN
 Barrierescr, Kacie C
 985 N Scramble avenue
 Scramble, WV 55555

STUDENT ID
 15266 / 541969

WA GRAD YR
 2008

LEGAL NAME
 Barrierescr, Gerald B

SCHOOL
DISTRICT CO. NUMBER
 WASWUG High School
 2121 W. Casino Rd
 Everett, WA 98204

AKA
BIRTHDATE **GENDER**
 07/22/1990 M

ENTRY DATE
 09/21/2007



PHOTOS

TEST SCORES

(Additional Test Scores Continued on back)

TRANSFER RECORD		TRANSCRIPTS SENT TO:			
TO	DATE	NAME	DATE	NAME	DATE