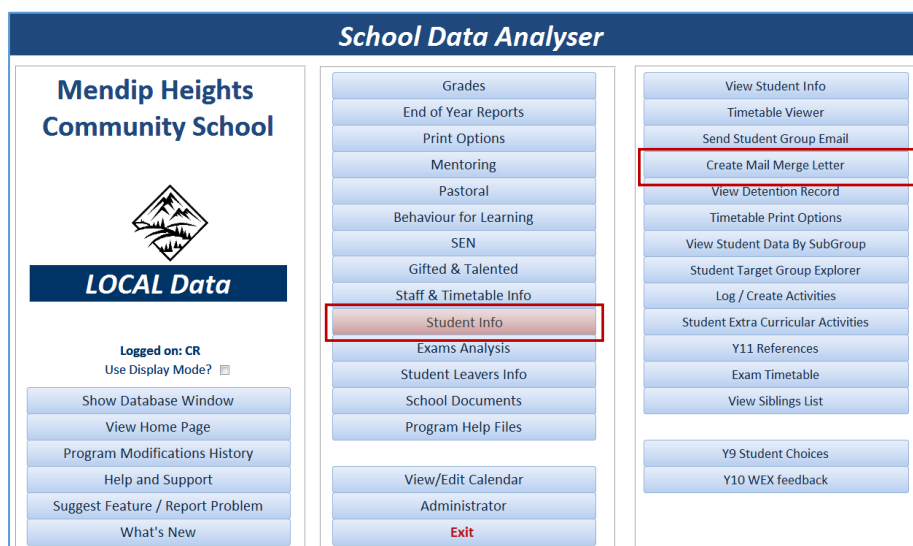


Creating mail merge letters in SDA

The ability to send mail merge letters from **School Data Analyser** is a very popular feature. It is much simpler than the normal mail merge process where you link to a suitable data source in **Word** and use this to obtain data for required data fields.

a) Mail merge letters

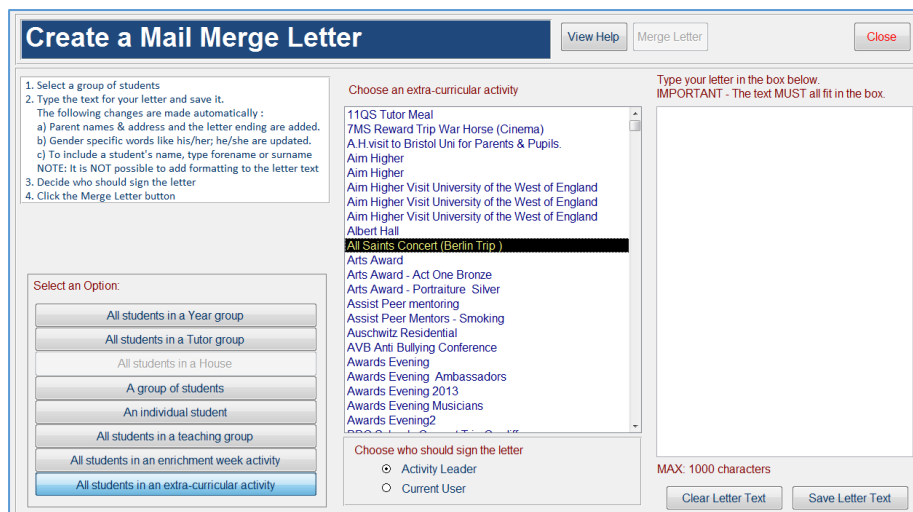
From the main menu screen, select **Student Info ... Create Mail Merge Letter**



The mail merge letters screen opens.

Choose a group of students from the options available: e.g. all students in a tutor group

Then choose the required group from the list that appears

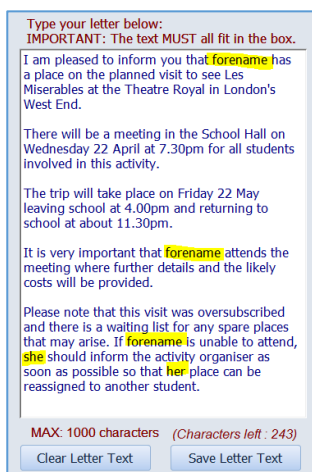
The screenshot shows the 'Create a Mail Merge Letter' form. It has a title bar with 'View Help', 'Merge Letter', and 'Close' buttons. The form is divided into several sections. On the left, there are instructions: '1. Select a group of students', '2. Type the text for your letter and save it.', and '4. Click the Merge Letter button'. Below the instructions is a 'Select an Option:' section with buttons for 'All students in a Year group', 'All students in a Tutor group', 'All students in a House', 'A group of students', 'An individual student', 'All students in a teaching group', 'All students in an enrichment week activity', and 'All students in an extra-curricular activity'. The middle section is titled 'Choose an extra-curricular activity' and contains a list of activities: '11QS Tutor Meal', '7MS Reward Trip War Horse (Cinema)', 'A.H.visit to Bristol Uni for Parents & Pupils', 'Aim Higher', 'Aim Higher Visit University of the West of England', 'Albert Hall', 'All Saints Concert (Berlin Trip)', 'Arts Award', 'Arts Award - Act One Bronze', 'Arts Award - Portraiture Silver', 'Assist Peer mentoring', 'Assist Peer Mentors - Smoking', 'Auschwitz Residential', 'AVB Anti Bullying Conference', 'Awards Evening', 'Awards Evening Ambassadors', 'Awards Evening 2013', 'Awards Evening Musicians', and 'Awards Evening2'. Below the list is a 'Choose who should sign the letter' section with radio buttons for 'Activity Leader' and 'Current User'. On the right, there is a text box for the letter content with the instruction 'Type your letter in the box below. IMPORTANT - The text MUST all fit in the box.' and a 'MAX: 1000 characters' label. At the bottom right, there are 'Clear Letter Text' and 'Save Letter Text' buttons.

An empty box now appears on the right of the form in which you will enter the letter text

To ensure this all fits on one page, you should make sure all the text fits in the letter text box. The number of characters available depends on the text layout used but cannot be more than 1000 characters. As you enter text, the number of characters used is displayed.

Once you reach the character limit, it will not be possible to add additional text.

The screenshot below is an example showing text that will fit on one page. Although this is less than 1000 characters, the text fills all the available space in the box due to the spaces between paragraphs



Type your letter below:
IMPORTANT: The text MUST all fit in the box.

I am pleased to inform you that **forename** has a place on the planned visit to see Les Miserables at the Theatre Royal in London's West End.

There will be a meeting in the School Hall on Wednesday 22 April at 7.30pm for all students involved in this activity.

The trip will take place on Friday 22 May leaving school at 4.00pm and returning to school at about 11.30pm.

It is very important that **forename** attends the meeting where further details and the likely costs will be provided.

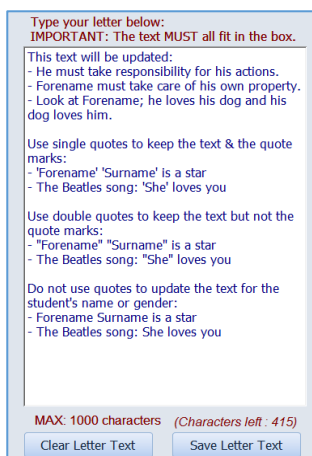
Please note that this visit was oversubscribed and there is a waiting list for any spare places that may arise. If **forename** is unable to attend, **she** should inform the activity organiser as soon as possible so that **her** place can be reassigned to another student.

MAX: 1000 characters (Characters left : 243)

Clear Letter Text Save Letter Text

The screenshot above also shows items that will be updated automatically for each student:

- Words such as him/her , he/she, himself/herself are updated depending on student gender
- To enter a student's name, type forename or surname – these are updated for each student.
- If, for some reason, you need the words forename or surname to appear in the letter, enclose these using quotation marks e.g. 'forename'
- Similarly, if you need a gender-specific word to remain unaltered, enclose it in quotation marks e.g. The Beatles song "She" loves you



Type your letter below:
IMPORTANT: The text MUST all fit in the box.

This text will be updated:
- He must take responsibility for his actions.
- Forename must take care of his own property.
- Look at Forename; he loves his dog and his dog loves him.

Use single quotes to keep the text & the quote marks:
- "Forename" "Surname" is a star
- The Beatles song: 'She' loves you

Use double quotes to keep the text but not the quote marks:
- "Forename" "Surname" is a star
- The Beatles song: "She" loves you

Do not use quotes to update the text for the student's name or gender:
- Forename Surname is a star
- The Beatles song: She loves you

MAX: 1000 characters (Characters left : 415)

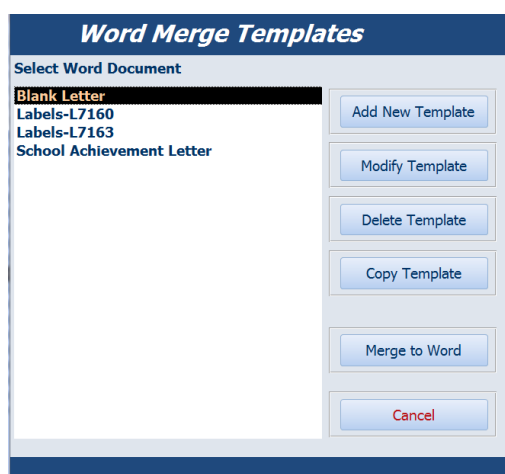
Clear Letter Text Save Letter Text

The following items are added automatically:

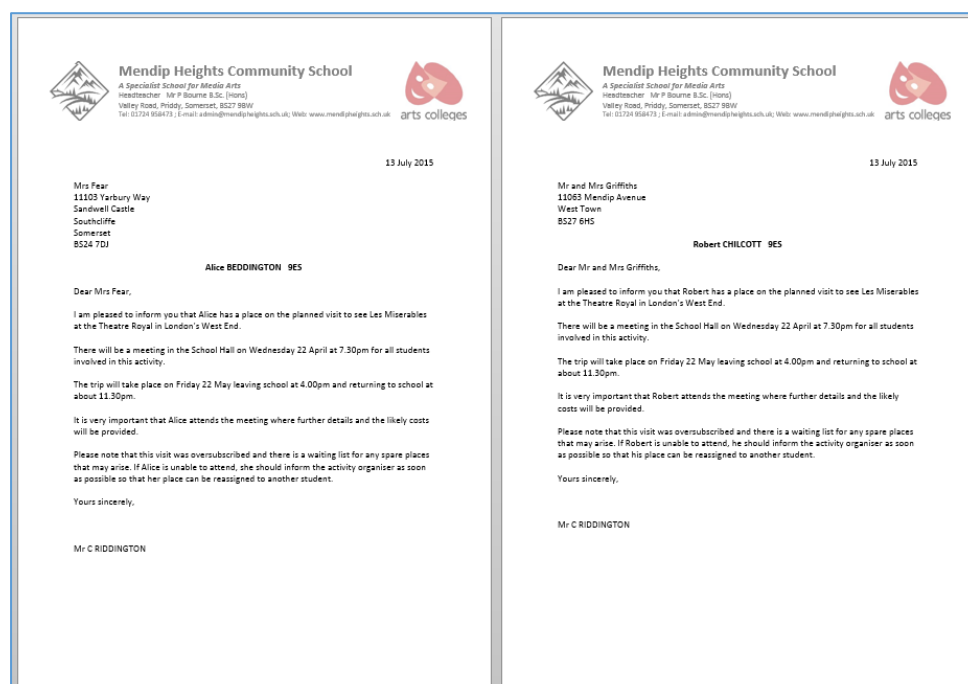
- Your school letter header and footer
 - Parent name & address – arranged to fit a standard envelope window
 - Student name and tutor group
 - Activity name (where relevant)
 - The letter heading – 'Dear ...'
 - The letter ending 'Yours sincerely' followed by the current user's name
- For some options, you will be able to select the activity leader as an alternative

NOTE: It is NOT possible to add text formatting such as bold or underline to the merge text

When you have finished the letter text, click the **'Save Letter Text'** button
 The **'Merge Letter'** button is then enabled. Click this and a screen similar to this will appear.



Select a document from the list, then select **'Merge to Word'**
 After a few seconds, **Word** will open with your merged letter ready for use. For example:



Note that gender specific words and student forenames / surnames have been updated for each letter.

If you need to add formatting to the letter text, you can do so at this stage.
 You can then print or save the letter for later use.

If you chose to create a letter for an individual student, the approach is slightly different
 In this case, you will enter text directly into the headed letter

Create a Mail Merge Letter Merge Letter View Help Close

1. Select a group of students.
2. Type the text for your letter and save it.
The following changes are made automatically:
a) Parent names & address and the letter ending are added.
b) Gender specific words like his/her; he/she are updated.
c) To include a student's name, type forename or surname.
NOTE: It is NOT possible to add formatting to the letter text.
3. Click the Merge Letter button.

Select an Option:

- All students in a Year group
- All students in a Tutor group
- All students in a House
- A group of students
- An individual student**
- All students in a teaching group
- All students in a subject
- All students in an extra-curricular activity

Enter the first few letters of the student's surname and press the return key

AHMED

Now select the student from the list

AHMED	Rhys	SBS

Student Selected:
Rhys AHMED, SBS

Select the student then click the 'Merge Letter' button

The letter then opens for you to enter the text directly.

Replace the text highlighted in green with your own text:

 **Mendip Heights Community School**
A Specialist School for Media Arts
Headteacher: Mr P Bourne B.Sc. (Hons)
Valley Road, Priddy, Somerset, BS27 9BW
Tel: 01734 958473 ; E-mail: adm.in@mendipheights.sch.uk; Web: www.mendipheights.sch.uk

 arts colleges

09 July 2015

Ms Bunzly
11501 Pearse Close
Bidwell
West Town
Somerset
BS27 7FY

Rhys AHMED SBS

Dear Ms Bunzly,

Delete this sentence and type your letter here

Yours sincerely,

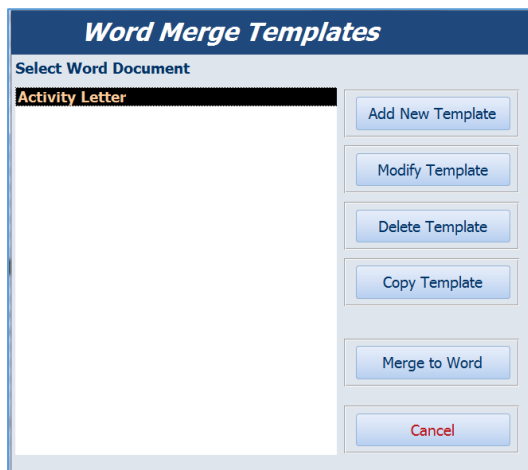
Mr C RIDDINGTON

b) Modifying the supplied letter templates

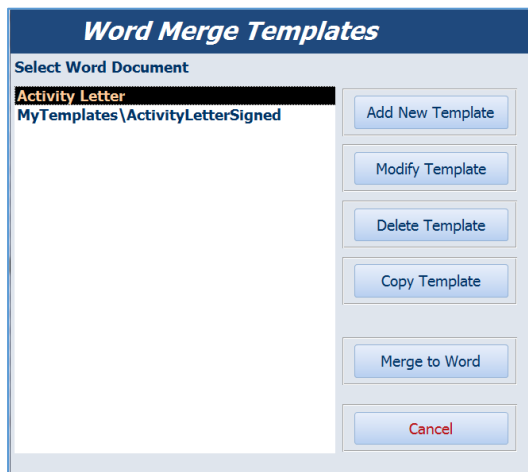
All users can modify letter templates using the first 4 buttons on the form below. For example, you may wish to add your signature by using a special font such as Lucida Handwriting or by inserting a scanned image of your signature.

You can do the following:

- Create a new template – you will need to add the database fields you require
- Modify an existing template – e.g. add/delete fields or add a signature
- Delete an existing user template (standard templates cannot be deleted)
- Copy a template



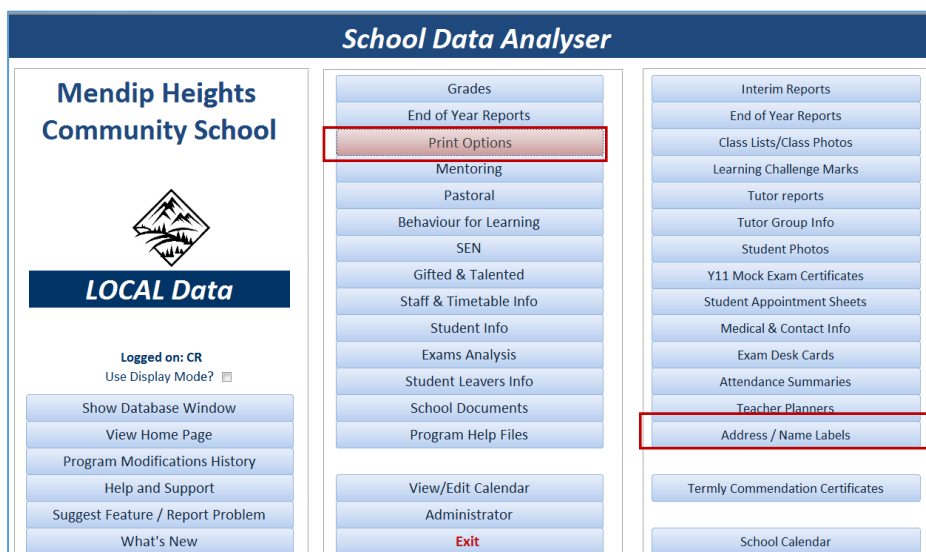
New or modified templates will be saved to a new folder **SDATemplates** in your **My Documents** folder. These templates will NOT be available to other users of the database



c) **Envelope labels**

NOTE: If you do not have access to windowed envelopes, you can instead print envelope labels. These are available from the merge templates form

Alternatively, from the **Main Menu** screen, select **Print Options...Address/Name Labels**



The labels are designed to fit standard Avery label types:

- L7163 (14 per page = 7 x 2) or L7160 (21 per page = 7 x 3)

If you use a different label type, please email support@mendipdatasystems.co.uk for advice.

Otherwise, choose the label type (14 or 21 per page) then select the group of students as before



The labels should then be printed using the appropriate label paper:

