



Creating Labels in MSWord using data downloaded from PeopleSoft

A mail merge is generally used to personalize form letters, to produce mailing labels and for mass mailings. When you use a mail merge to produce labels, it gives you a lot of flexibility on the types of labels you can produce. For example, you may use it to produce name tags for a function that you may be hosting.

A mail merge document has two pieces – a main document and a data source.

The *main document* contains information that will not change from one recipient to another like content, text and graphics. It also contains the instructions or merge fields that tells Word what information it should import.

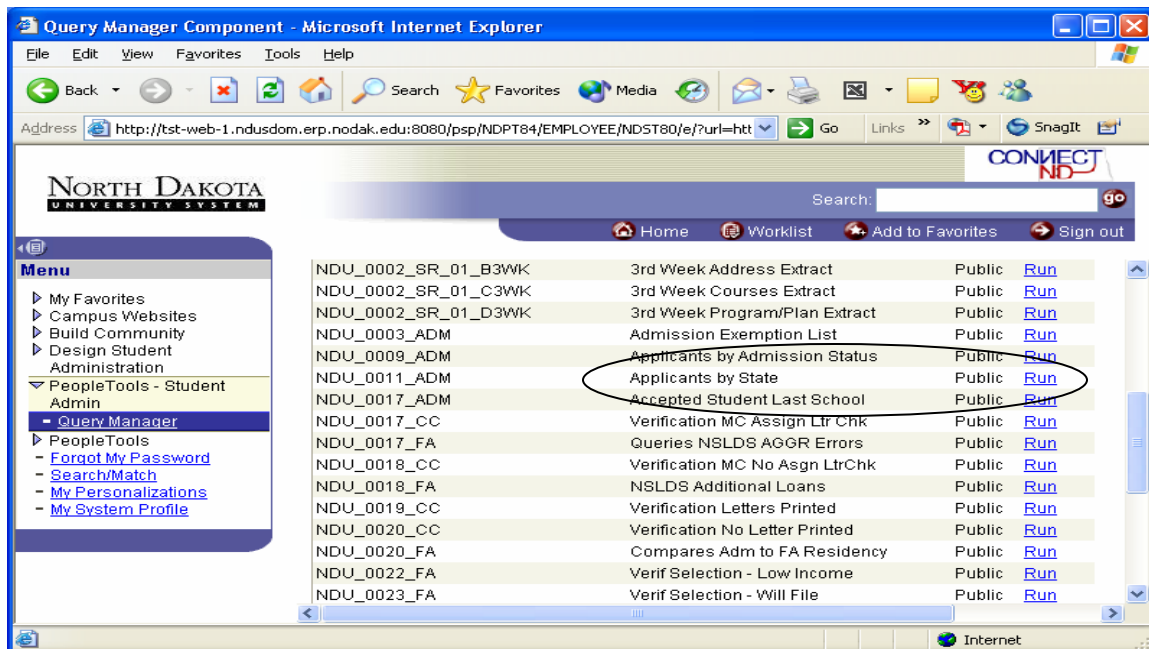
The *data source* is the file that contains the information that is to be merged with the main document. This file can contain names, addresses, dates and other information that you want to include in your document. Example: Microsoft Excel workbook, Microsoft Access database file, or Microsoft Outlook contact list.

To download data in PeopleSoft to use as our data source

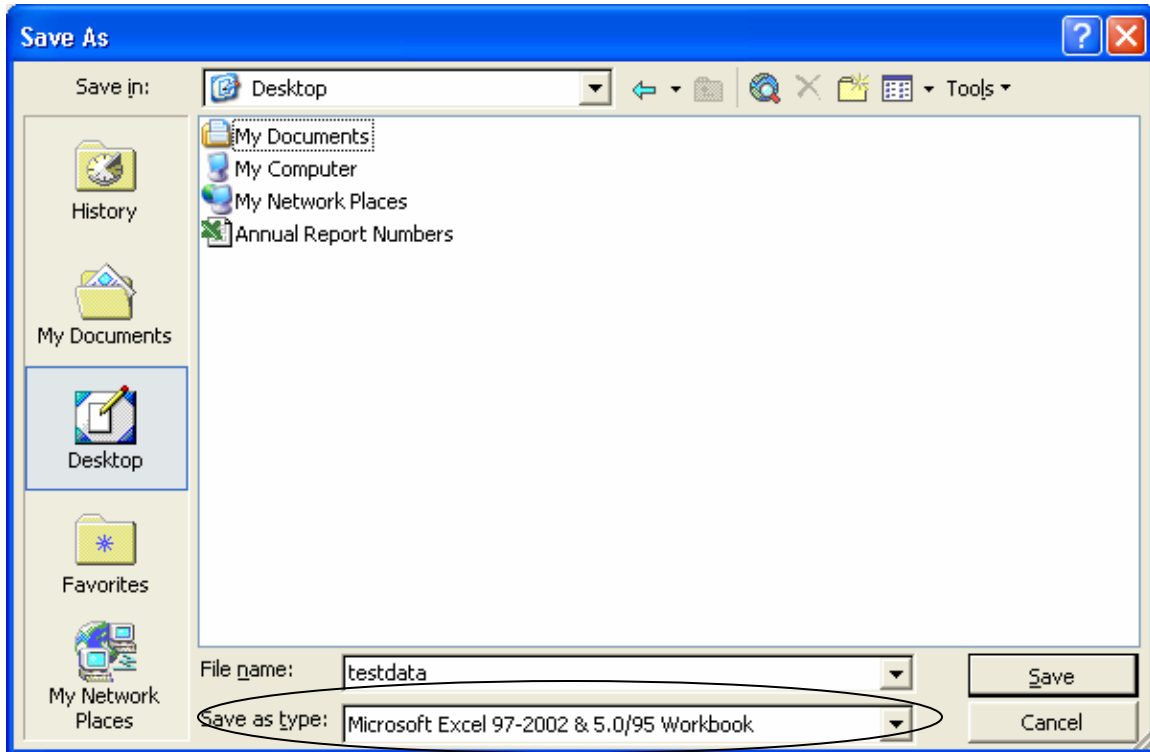
Login to ConnectND Portal

Select from the Enterprise Menu: People Tools-Student Admin, Query Manager

Find an existing Query



Save the file as: [Test Data](#) (Change File Type to Excel)



To create labels in MSWord

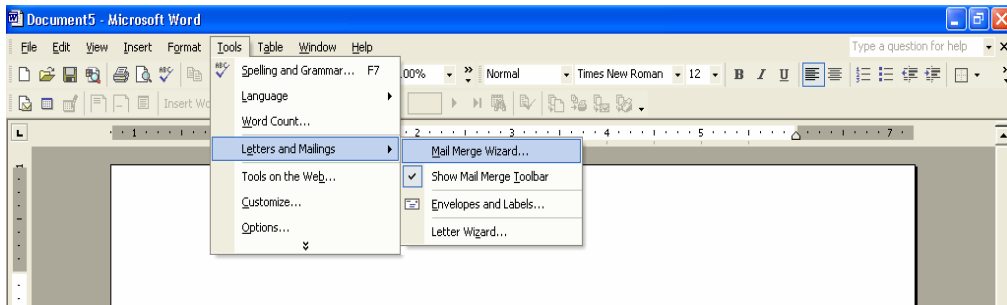
You can use the Mail Merge Wizard or Mail Merge toolbar to create labels. We will use the wizard for this exercise.

Open [MSWord](#)

Select [Tools](#)

Click on [Letters and Mailings](#)

Click on [Mail Merge Wizard](#)

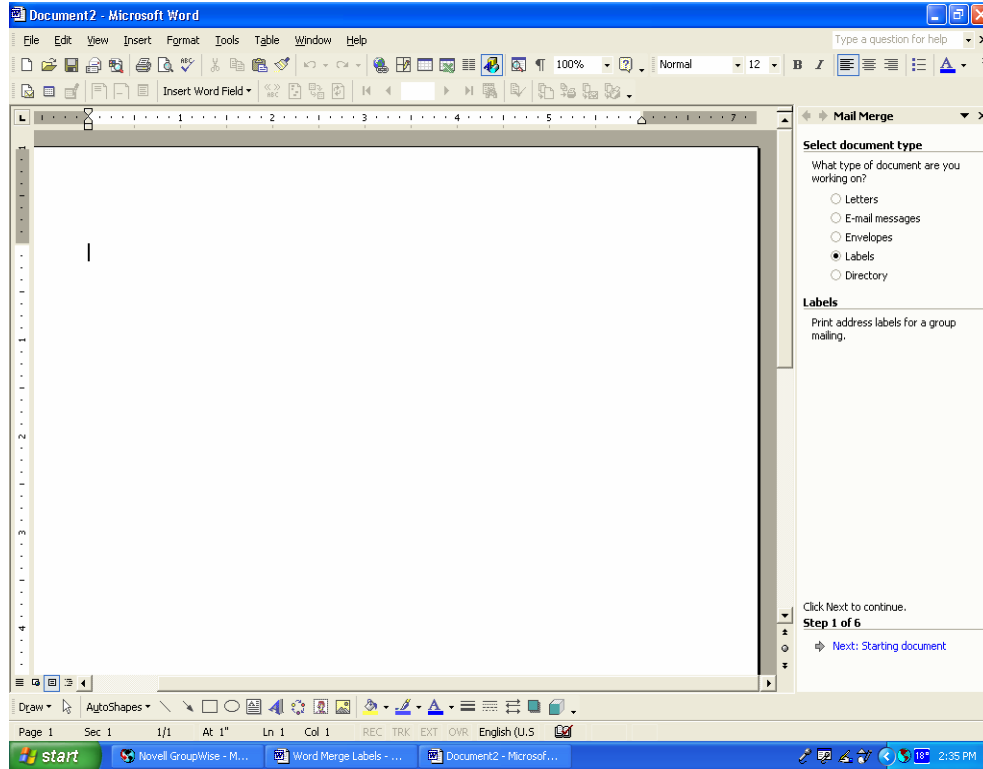


Notice that the mail merge task pane is on the right side of the screen. The mail merge wizard in this task pane takes you through six steps of the process. All selections for this process are made in the mail merge task pane.

Step 1 Select document type

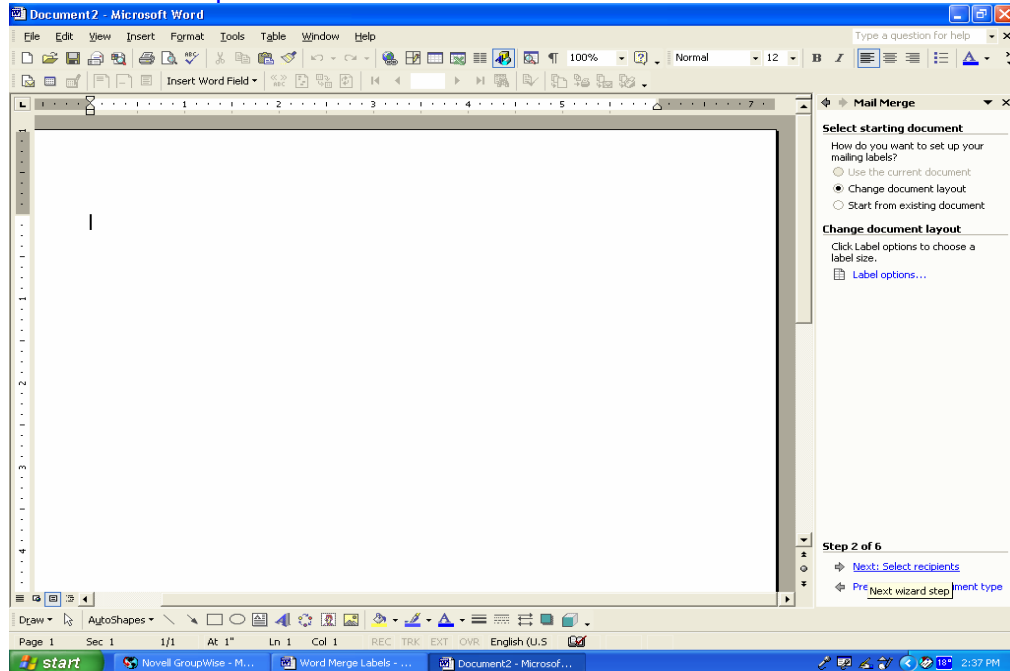
Click on [Labels](#)

Click on [Next: Starting document](#) (This is located at the bottom of the task pane.)



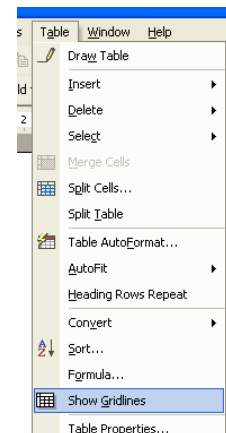
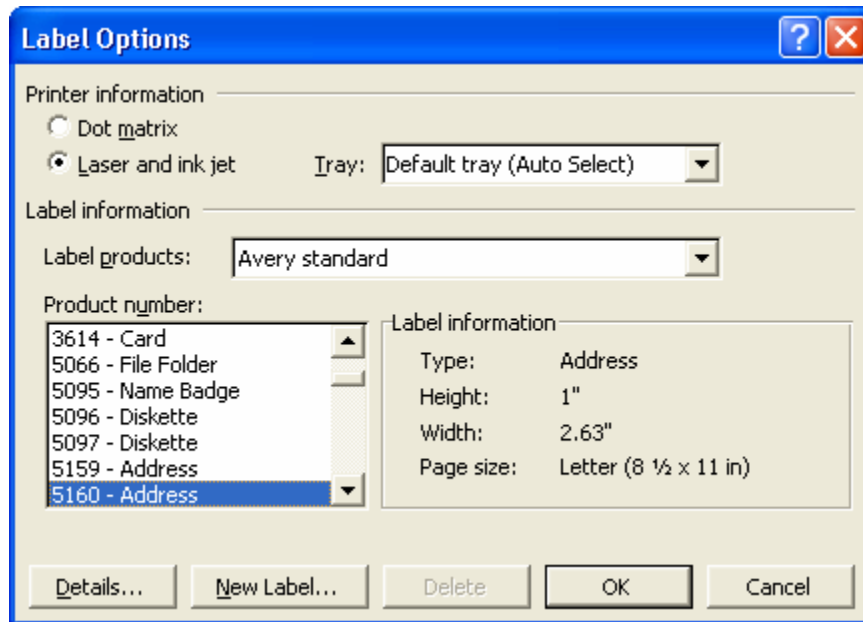
Step 2 Select starting document

Click on [Label Options](#)



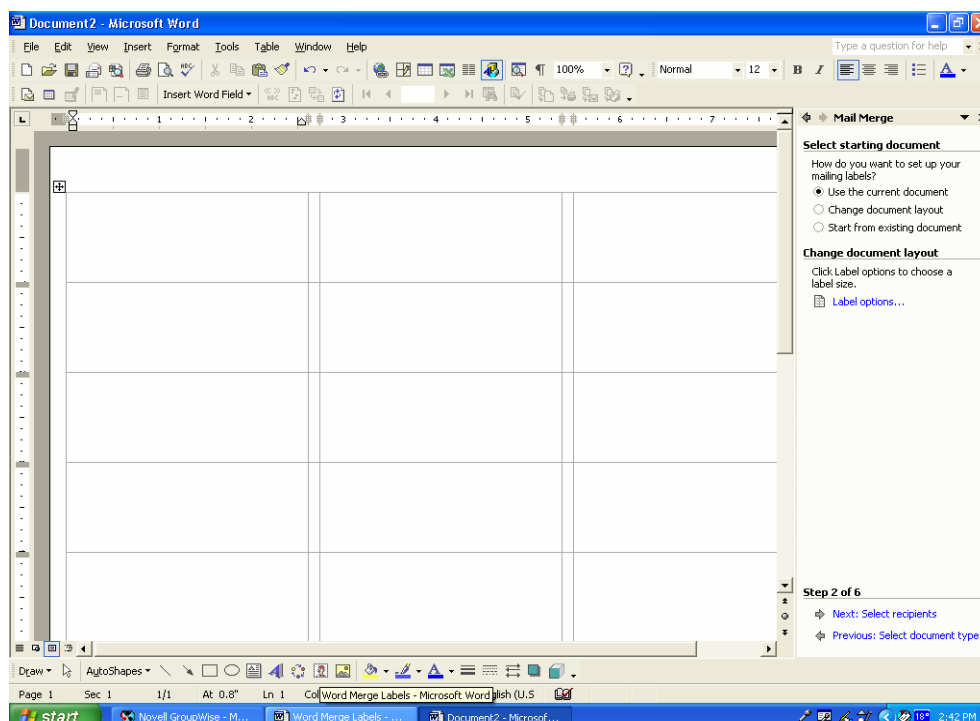
In the Label Options dialog box select your label information. Notice that you can select by product name and product number. If you do not see your label listed, you can create your own by using the New Label button.

Click [Ok](#)



Your screen should have light gray gridlines showing you the layout of your labels. If you don't, you can go to Table on the menu bar and click on Show Gridlines as shown on the right.

Click on [Next: Select recipients](#)



Step 3 Select recipients

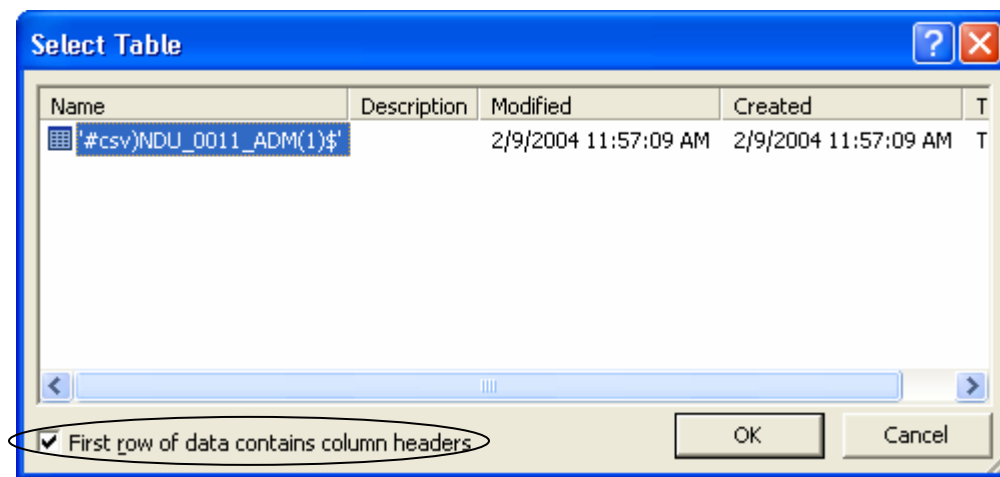
- *Use an existing list* uses an existing file that contains the data.
- *Select from Outlook contacts* uses a Microsoft Outlook contacts folder.
- *Type a new list* creates a new source by typing in the data. If you use this command the recipient list is saved as an access database file.

Select [Use an existing list](#)

Click on [Browse](#) to locate **Test Data** spreadsheet.

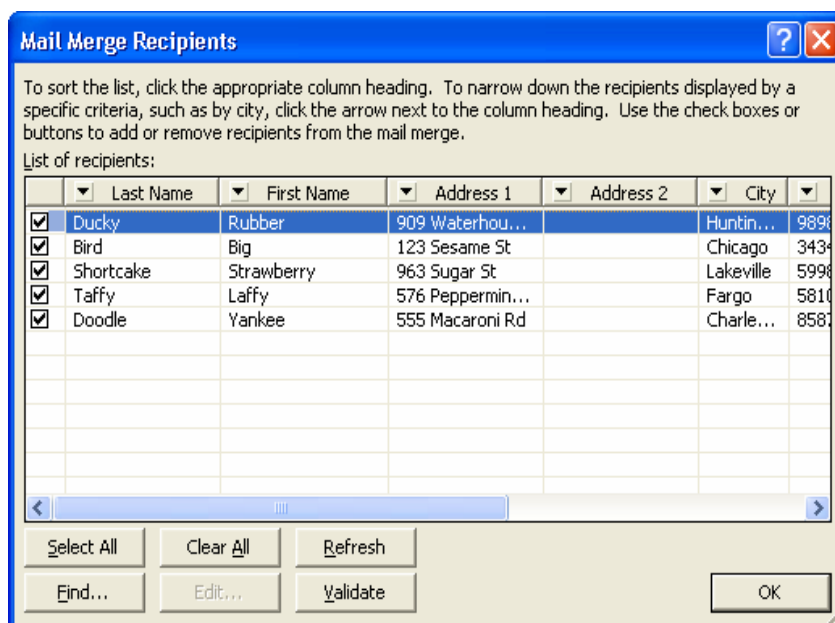
Click on [Open](#) to select file. The Select Table window is displayed. (Notice the “First Row of data contains column headers” is checked.)

Click [Ok](#) to select the table



In the mail merge recipients dialog box you can sort or filter data by following the instructions on the dialog box.

Click [Ok](#)



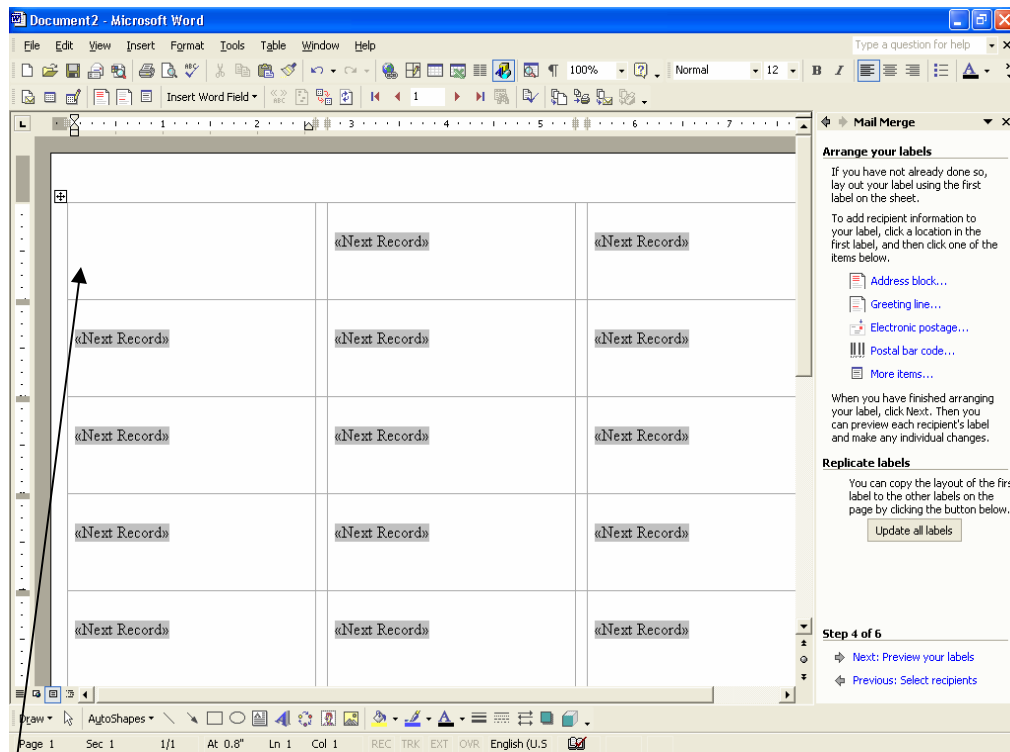
Click [Next: Arrange your labels](#)

Step 4 Arrange your labels

In this step you will insert merge fields to your label. Merge fields are placeholders that tells Microsoft Word where to insert text, page numbers, graphics and other information in the document.

- *Address Block* inserts formatted address related fields.
- *Greeting line* inserts formatted salutations fields.
- *Electronic Postage* inserts electronic postage fields.
- *Postal Bar Code* inserts the postal bar code.
- *Select more items* inserts data fields from the data source.

Notice that after selecting your recipients, Word automatically inserts a Word field called Next Record in each label. This field allows Word to print the next record without starting a new page.

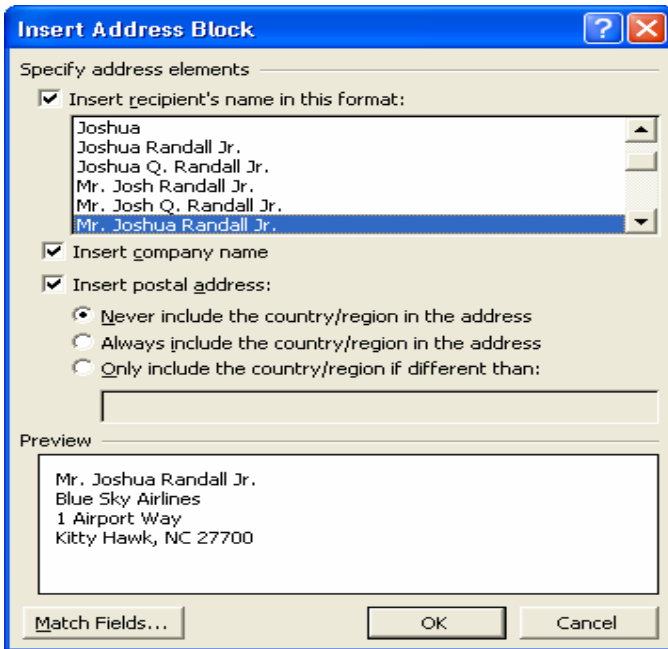


Make sure to position your insertion point in the first label prior to selecting the address block field.

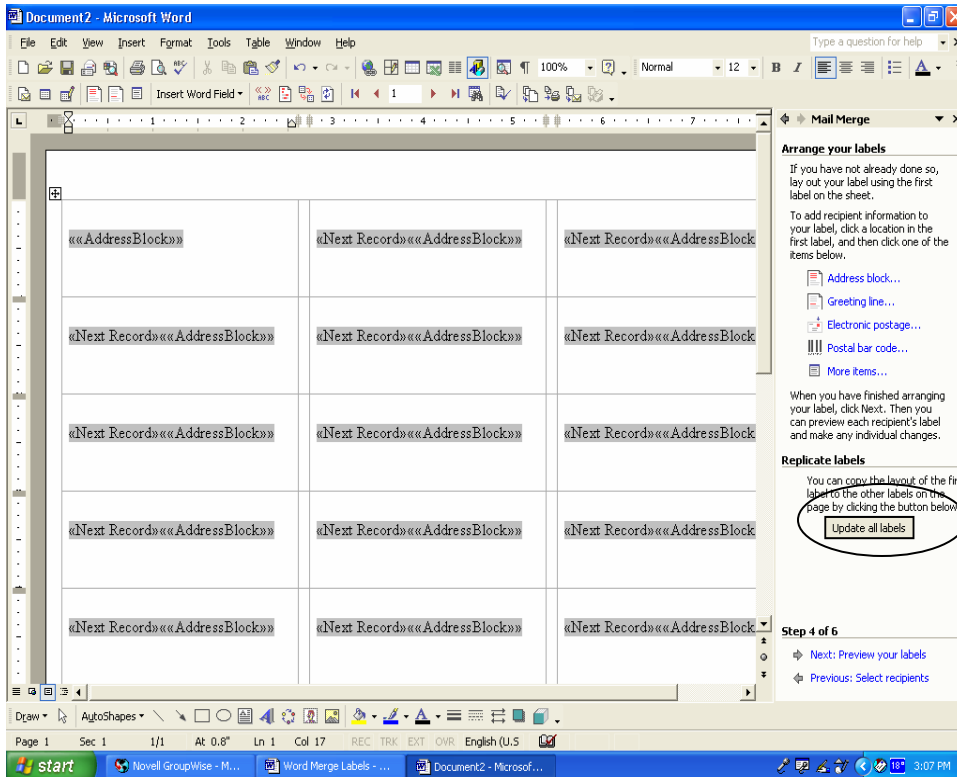
Click on [Address Block](#) to insert your merge fields. By default the address block field includes name, company name, street address, city, state, and zip code. You can verify your field names by selecting the Match Fields button. You can also select your field names from your data source by selecting [More Items](#).

Make your selections

Click **OK**



Click on [Update Your Labels](#) button located in the Replicate Label area of the task pane to copy the layout of the first label to the other labels.



Click on [Next: Preview your labels](#)

Step 5 Preview your labels

- In this step Microsoft Word matches the merge field in the main document with the text from your data source.
- You can preview the labels by clicking on the right and left arrows in the mail merge task pane.
- You can find specific information from your data source by clicking on find a recipient.
- To make changes to the recipient list, click the edit recipient list button. *Note: When you make changes to the recipient list, it affects the output data not the original data source.*
- You can also exclude a recipient by selecting Exclude this recipient button.

Click Next: Complete the merge

Step 6 Complete the merge

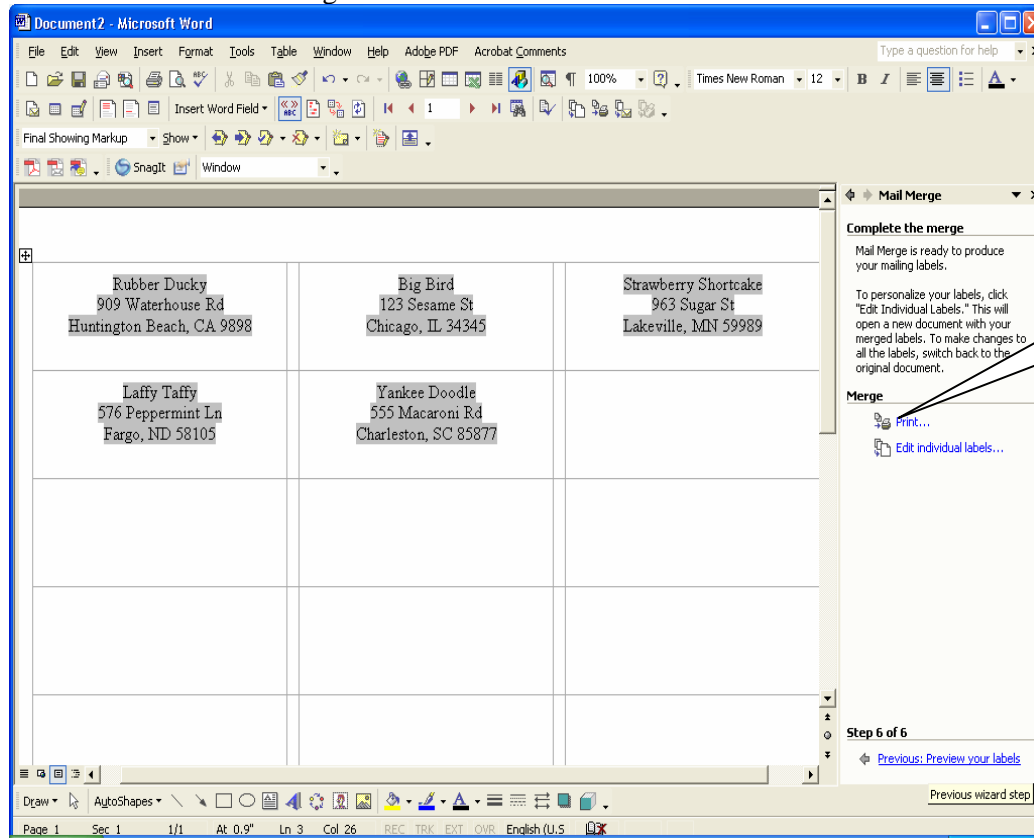
Important: Do not choose print on the toolbar or file print menu.

You have two options to Print or Edit individual labels. When you choose print in the task pane, the Merge to Printer dialog box pops up. You can print all records, a current record or a group of records. When you choose edit individual labels it will allow you to merge to a new document.

Select Print

Click Ok

Click Ok in the Print dialog box



Since I used PeopleSoft data that is not available for you to use, you can use the data source file “homemailinglist” located in the Microsoft Office-Word link of www.und.edu/dept/cndtrain to practice.