

SSRS and Mail Merge - Rule 5(f) Advisal (Brady Advisal)

SQL Server Reporting Services (SSRS) is a server-based report generating software system from Microsoft. SSRS allows the users to pull MJ cases where a future Initial Appearance hearing is set. The exported Excel list can then be merged (via Microsoft Mail Merge) into the Brady Advisal Order (Word template).

Step 1: Run the SSRS Report and Export to Excel Format

Access the SSRS Report (titled: Report for IA Merge):

<http://sp.casd.circ9.dcn/sites/IT/CMECF%20Reports/Report%20for%20IA%20Merge.rdl?d=wc57d29dec17b415bab348b0c6d772d16>

You will receive “**Start Date**” and “**End Date**” parameter prompts for the hearing date(s) you’d like to output data for.

Click **Apply** to run the report.

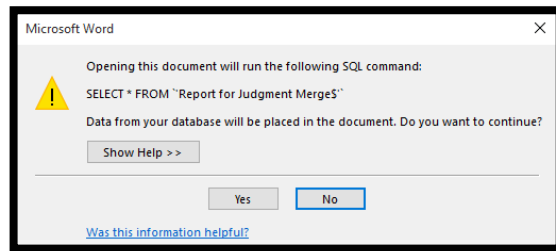
Select **Actions - Export - Excel** to output an Excel spreadsheet. When prompted to Open or Save, select “Save As” from the dropdown “Save” options. Save to your desktop or preferred network folder.

Step 2: Merge Data into Brady Advisal Order Template

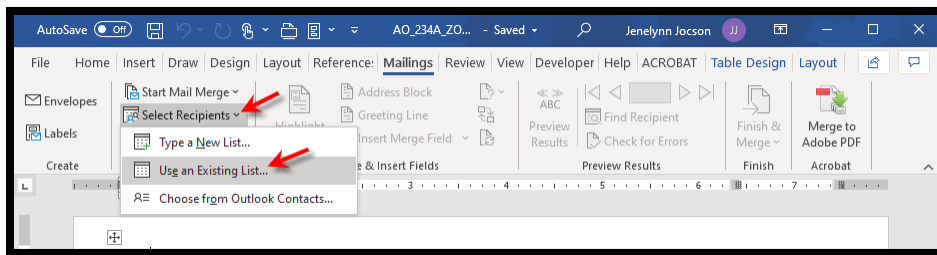
Open your *Merge Ready* Word template (title: XXX_Brady Advisal Order_Merge Ready; XXX = Judge Initials)

I: Drive - Courtroom Deputies - Magistrate – Brady Order_Merge Ready

Click **No** when prompted to populate your template with the last list of data used.

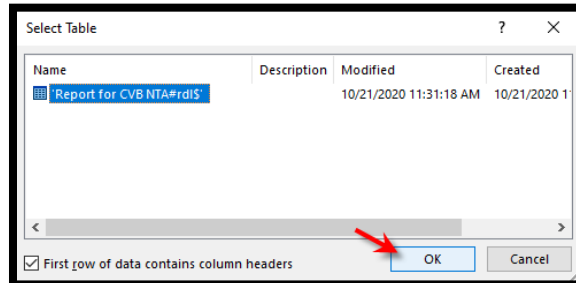


Begin your new data merge by selecting **Mailings - Select Recipients - Use an Existing List**



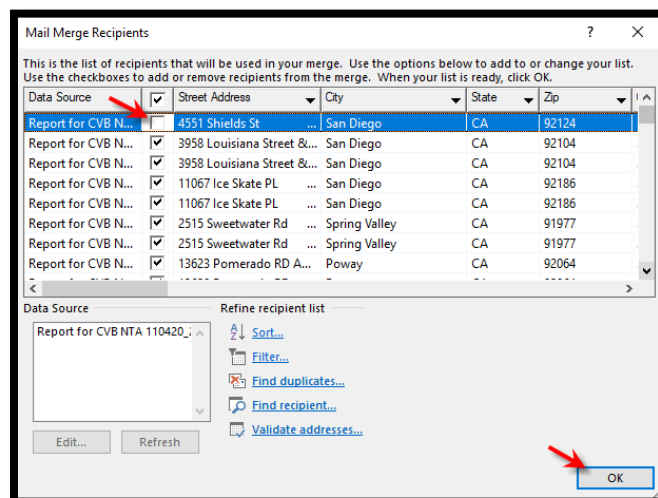
Select the **Excel data (Report for IA Merge)** you previously saved.

Click OK to verify the selected table.



From the Mailings Ribbon, click on **Edit Recipient List** to **Deselect** any rows of data you do not want to merge into your template.

Click **OK** to continue.



From the Mailings Ribbon, click on ***Finish & Merge - Edit Individual Documents***, then ***OK*** to obtain a file of all populated notices.

