



ETT 229 Project 5: Create a Mail Merge Letter Using Microsoft Excel and Word

Section A: Project Overview

Purpose: This project is designed to introduce you to the word processing and spreadsheet interfaces within Microsoft Excel and Microsoft Word through the creation of a mail merge letter. Through the successful completion of the rubric assignment, the learner will demonstrate the ability to perform the following tasks:

- Create a basic database with headers in Microsoft Excel.
- Create a mail-merge template in Microsoft Word.
- Incorporate external data fields into the content of a word processing document.
- Export the completed mail merge letters from Microsoft Word.

Assignment Submission: All assignments must be submitted via Blackboard. (Please use the Assignment link within this project's Blackboard folder to submit your assignment.) This project will have **three** documents, all of which must be uploaded to your Assignment link and named as follows:

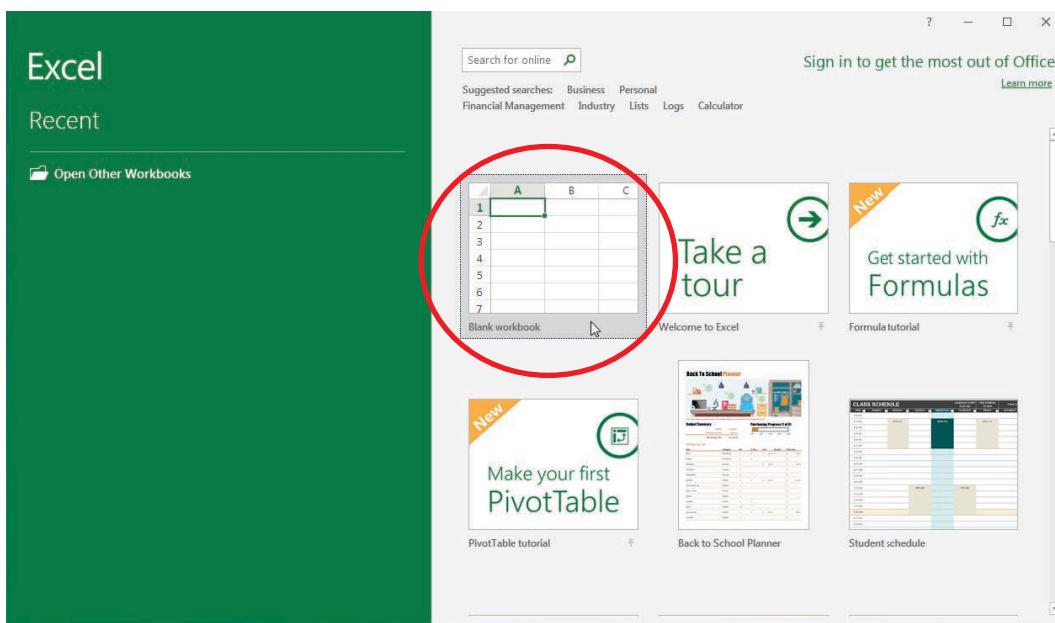
- ETT229_Lastname_Data.xlsx
- ETT229_Lastname_Letter.docx
- ETT229_Lastname_MergedLetters.docx

Assignment Grading: Please review the grading rubric shown below. Before submitting your project, review the rubric to ensure that you have met all requirements.

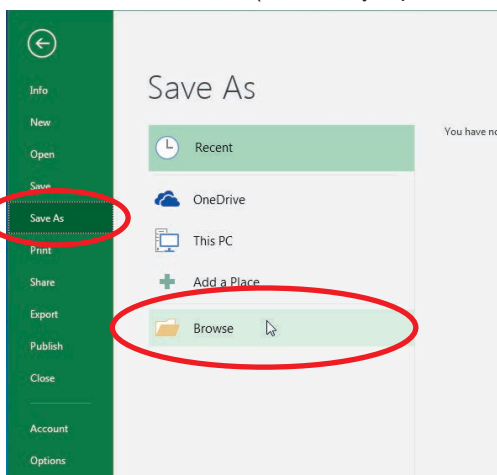
Grading Rubric for Project 5: Mail Merge Letter	
File Management: <ul style="list-style-type: none">• Document is saved and named correctly, then uploaded via the correct assignment link.	20 points
Document Formatting: <ul style="list-style-type: none">• The database (Excel) contains seven columns of information including student first name, student last name, street address, city, zip, and parent salutation.• The letter template is set up so that merge fields are in the appropriate places with correct spacing and punctuation.• The merged letter document contains all 10 letters, correctly merged.	60 points
Content: <ul style="list-style-type: none">• All content uses correct spelling and grammar, and is professional in tone.• Content mainly follows directions given in the job aid, but student has obviously put effort into customizing the content.	20 points
TOTAL	100 points

Section B: Set up your database of student information

- 1) Launch Microsoft Excel (the Office 365 version for Microsoft Windows; do not use the “Office Online” app), then create a new blank document.

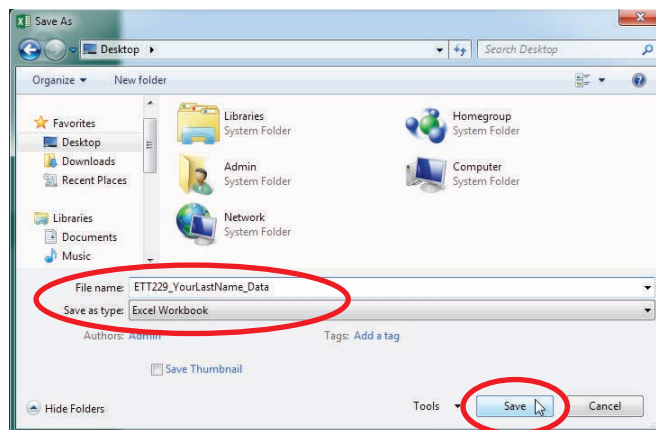


- 2) Click on the **File** menu (at the very top of the screen), then choose **Save As...** then **Browse**.

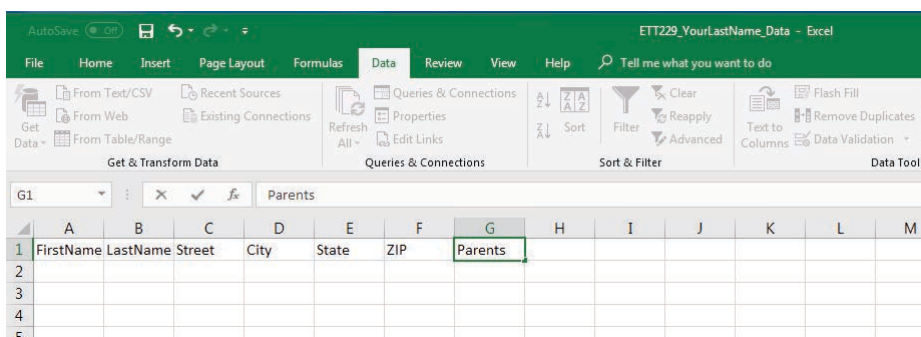


- 3) Type in the file name, using the format **ETT229_Lastname_Data**.
Save the document to a convenient location (such as your Desktop or a project folder), leaving the file format as the default **.xlsx** file.

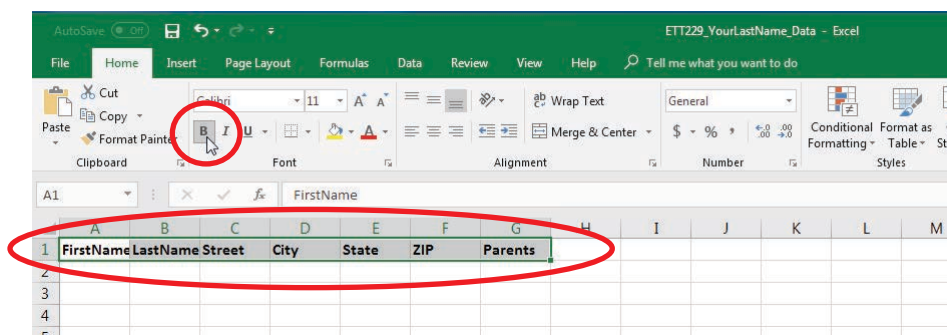
Be sure to SAVE your project periodically throughout the remaining steps of this exercise!



- 4) Click on Cell A1 and type, "FirstName." Then continue entering column headers as shown below:



- 5) Click-and-drag with your mouse to highlight cells A1 through G1 (your Header row). From the **Home** tab, click the **Bold** button.



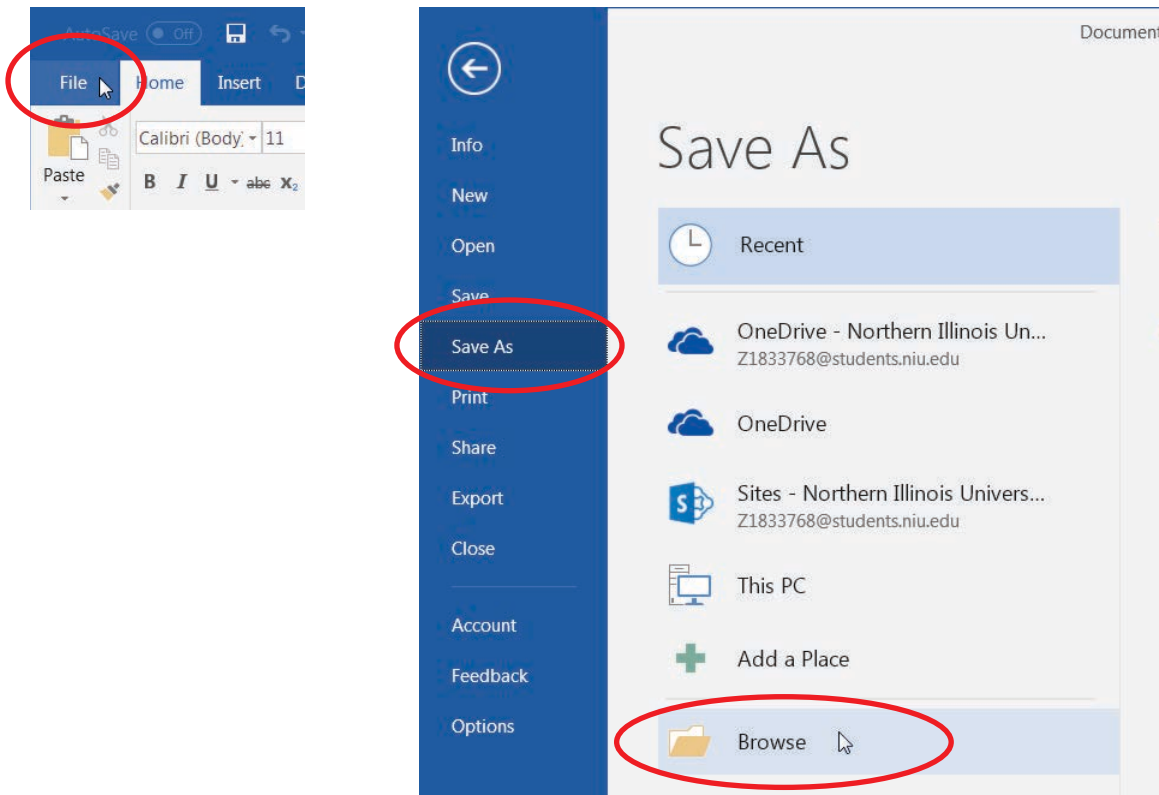
- 6) Below your column headers, enter the information for 10 fictitious students (make this information up). A sample completed worksheet is shown below. **Do not type a space** after the names (but of course, **do** place a space between words within the street address and the parent's salutation).

	A	B	C	D	E	F	G	H
1	FirstName	LastName	Street	City	State	ZIP	Parents	
2	John	Simmons	123 Main Street	Chicago	IL	60631	Mr. and Mrs. Simmons	
3	Shana	Stevens	456 West Street	DeKalb	IL	60115	Mr. and Mrs. Stevens	
4	Vasudha	Saraswat	789 East Street	Rockford	IL	61016	Mr. Saraswat	
5	Michael	Rodriguez	321 South Street	Chicago	IL	60007	Mr. and Mrs. Rodriguez	
6	Pawel	Urbaniak	654 North Street	Milwaukee	WI	53220	Dr. Urbaniak	
7	Sandra	Gibbs	987 Book Street	Chicago	IL	60638	Ms. Gibbs and Mr. Jones	
8	Robert	Clinton	678 Clock Street	Naperville	IL	60565	Mrs. Clinton	
9	Jenny	Rasmun	345 Lunch Street	Rockford	IL	61114	Dr. and Mrs. Rasmun	
10	Andrea	Johnson	963 Mill Street	DeKalb	IL	60115	Mr. and Mrs. Johnson	
11	Delmar	Smith	257 Tall Street	Chicago	IL	60640	Dr. Smith	
12								

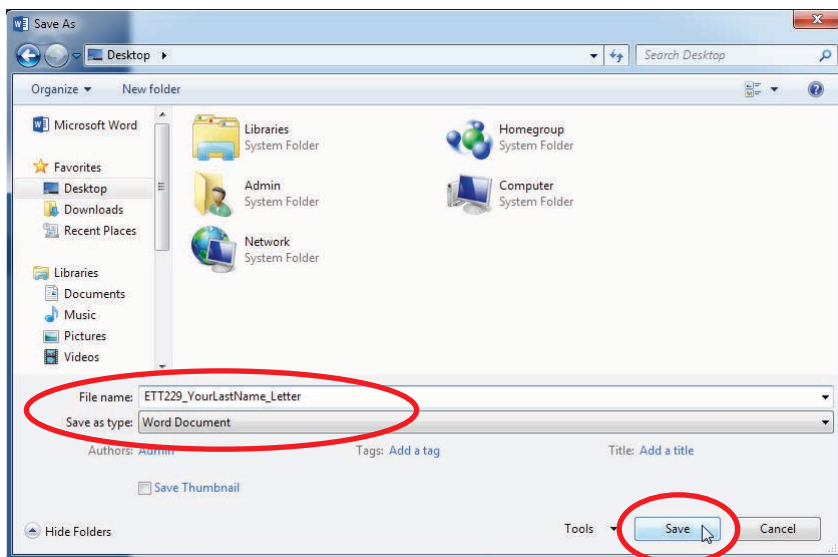
- 7) **Save** then **close** your file, then proceed to the next step.

Section C: Set up your letter template

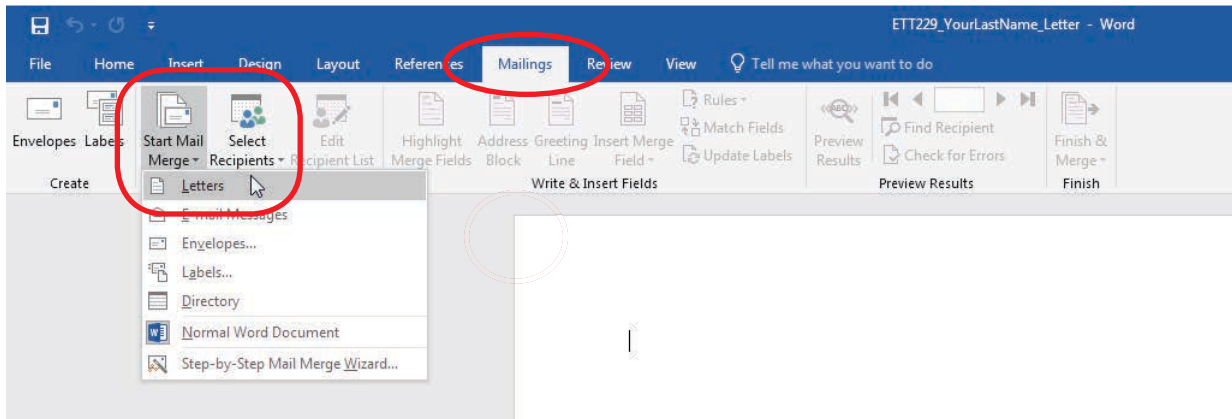
- 8) Launch Microsoft Word (the Office 365 version for Microsoft Windows; do not use the “Office Online” app), then create a new blank document.
- 9) Click on the **File** menu (at the very top of the screen). Choose **Save As**, then click **Browse**.



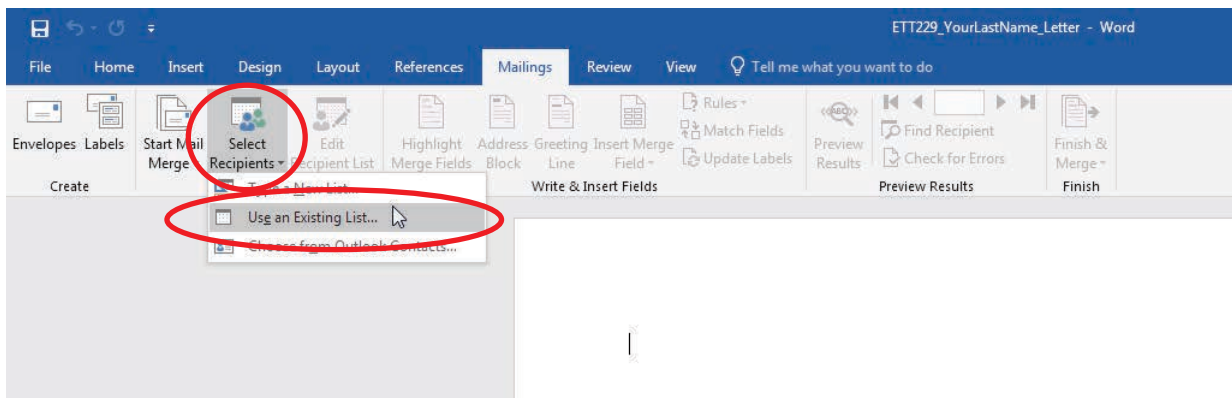
- 10) Type in the file name, using the format ETT229_Lastname_Letter. Save the document to a convenient location (such as your Desktop or a project folder), leaving the file format as the default .docx file.



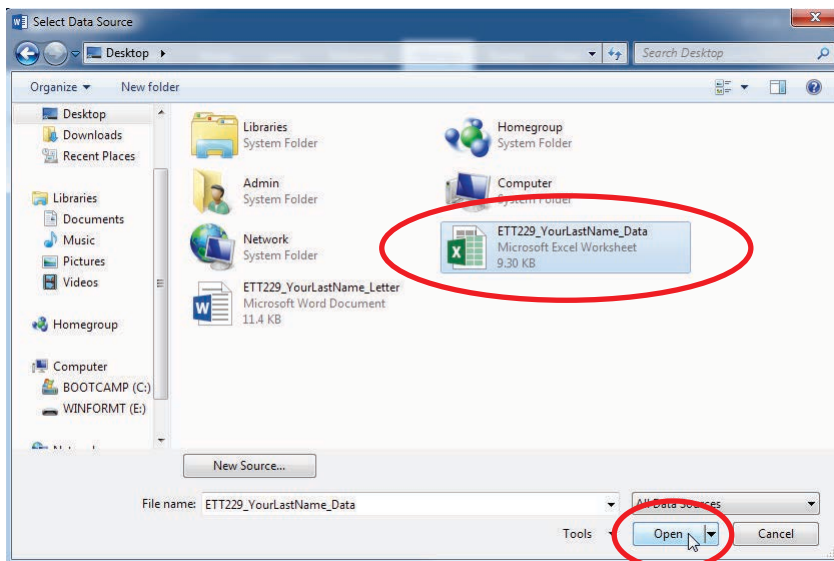
- 11) From the **Mailings** tab, click on the **Start Mail Merge** drop-down menu to select the **Letters** option.



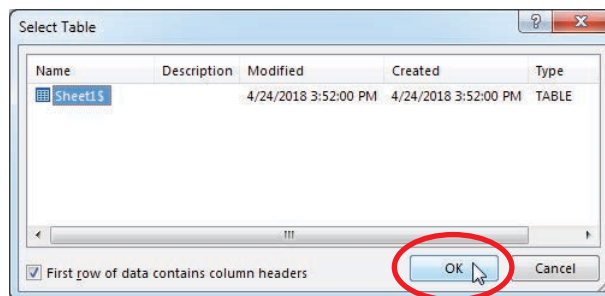
- 12) Click on the **Select Recipients** drop-down menu to select the **Use an Existing List...** option.



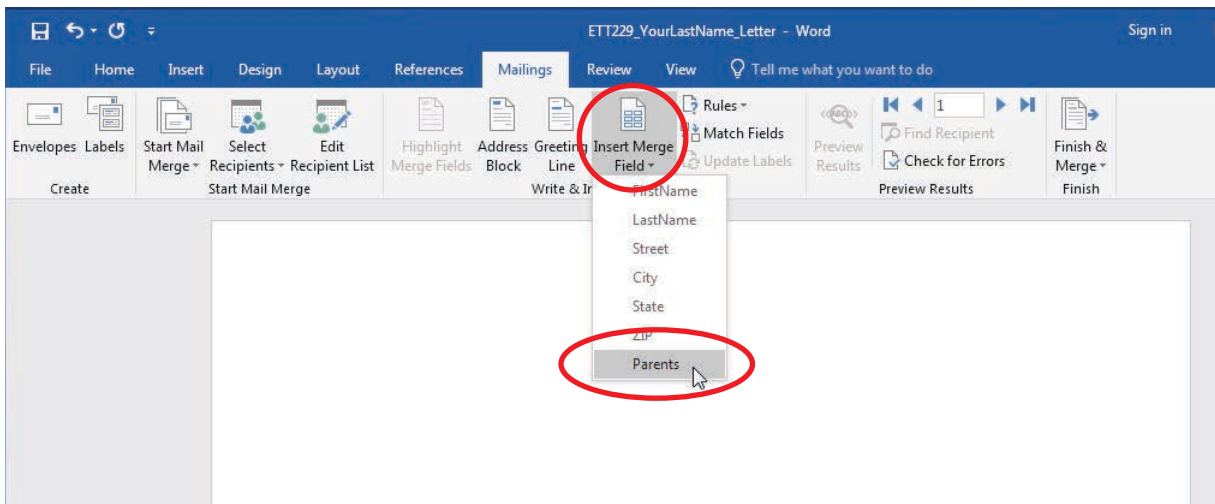
- 13) Find then select the Excel file you created in Section B, then click **Open**.



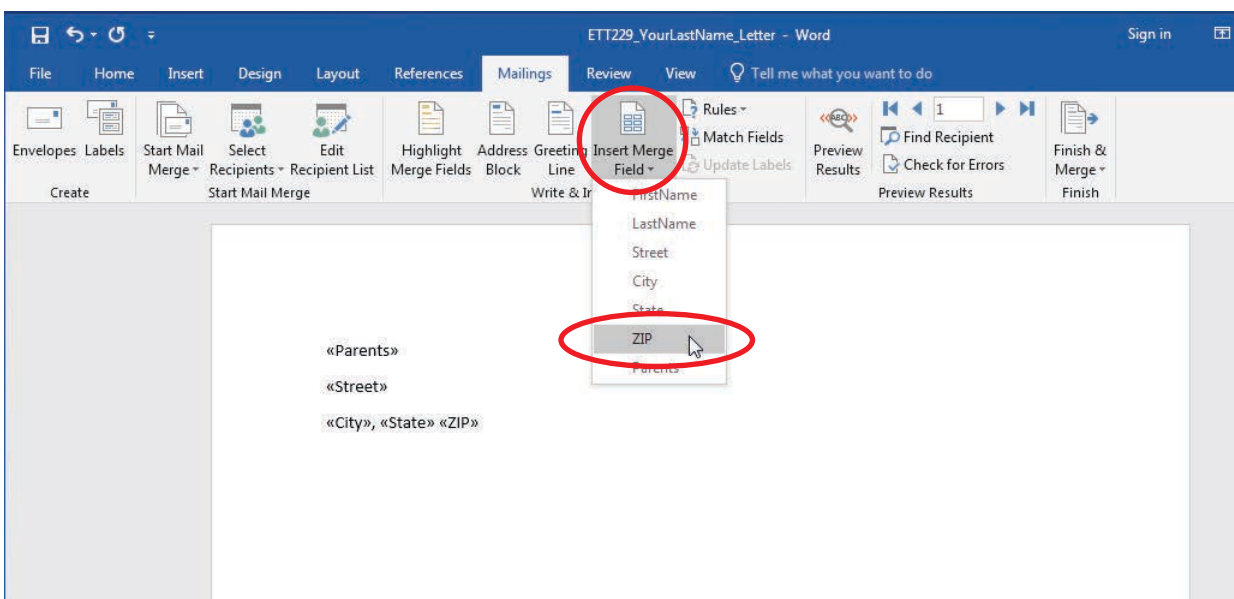
- 14) When the Select Table dialog box appears, leave it at the default settings to select all cells in the first worksheet, then click **OK**.



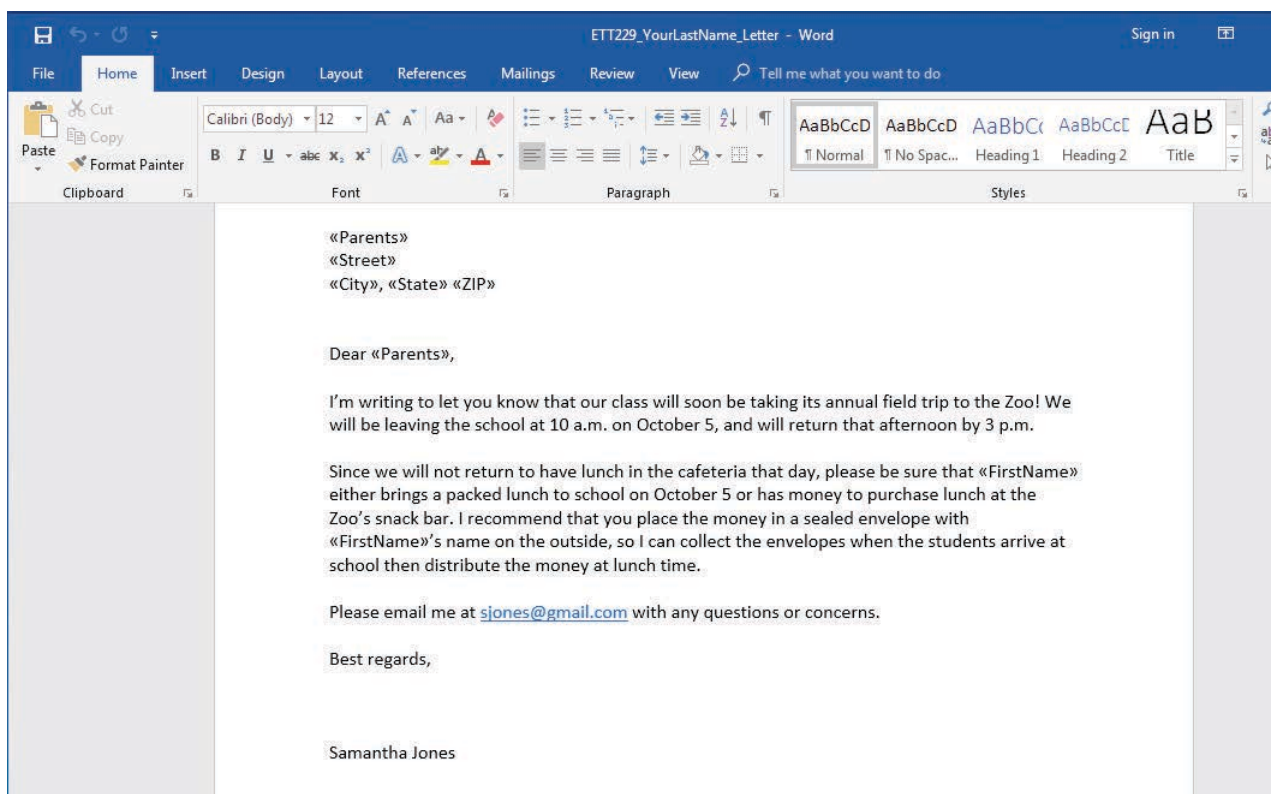
- 15) Click on the **Insert Merge Field** drop-down menu to select the **Parents** field.



- 16) Press the “Enter” key to move to a new line, then insert the Street field. Press the Enter key again to create a third line, then insert the City field. On this same line, type a comma then type a space. Insert the State field then type a space. Insert the ZIP code.



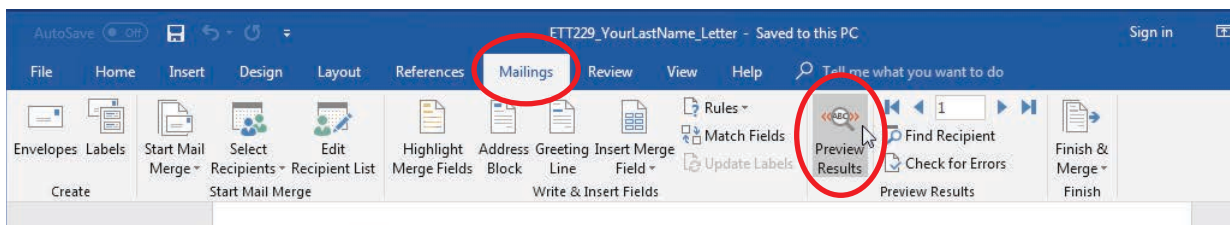
- 17) Continue typing your letter as you normally would type any document in Microsoft Word. Adjust your formatting and your margins (if desired). Write your own letter to tell your students' parents about an upcoming field trip (an example is shown below). Be sure to add the student's FirstName field at least once within the letter.



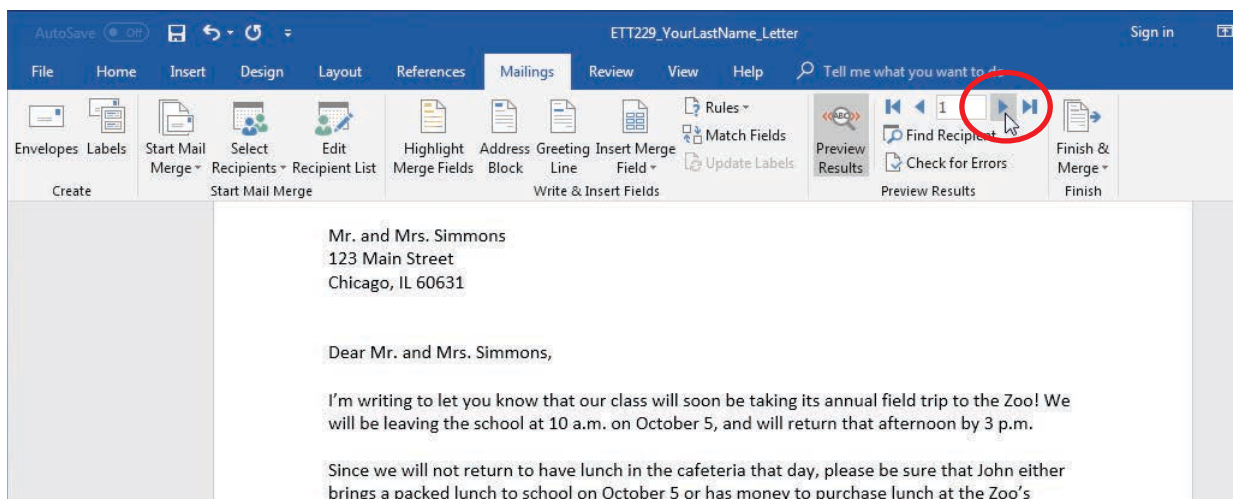
- 18) Save your file, then proceed to the next step.

Section D: Complete the mail merge

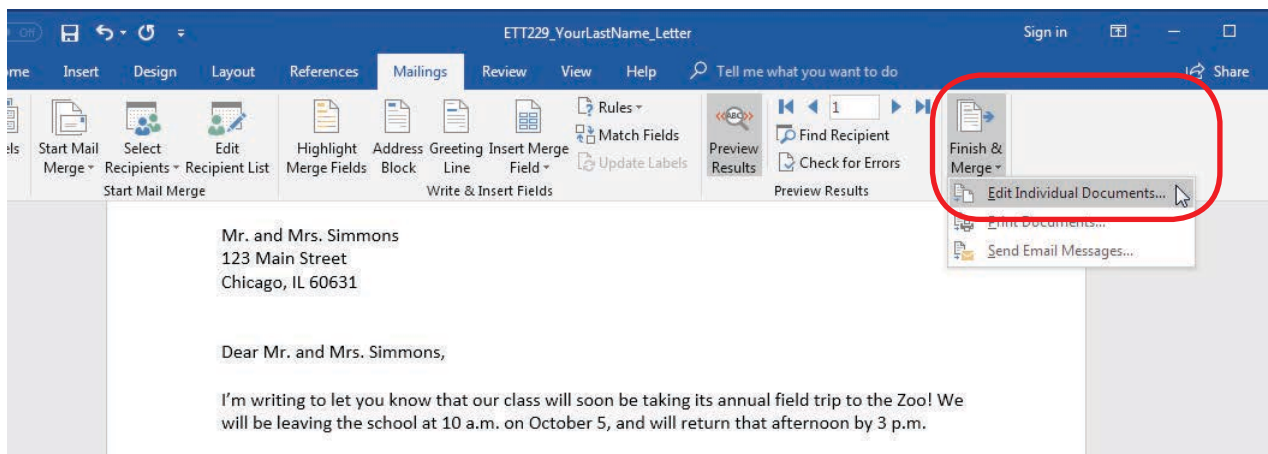
- 19) From the Mailings tab, click on the Preview Results button.



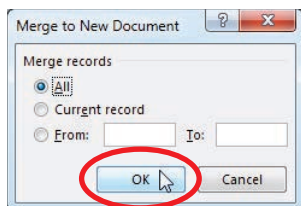
20) Using the **Forward** button, view previews of all 10 pages of your merge.



21) If everything looks okay, click the **Finish and Merge** drop-down menu to select **Edit Individual Documents...**



22) When the Merge to New Document dialog box appears, make sure that "All" is selected, then click OK.



23) Your merge has completed, resulting in a new 10-page Word document (with one page for each student). Save your new document with the file name ETT229_Lastname_MergedLetters.docx. **Upload all three files to the Assignment link in Blackboard to earn full credit for this assignment.** You're done!

End of Job Aid