

Exporting SASI Data into Excel for Mail Merge with Word

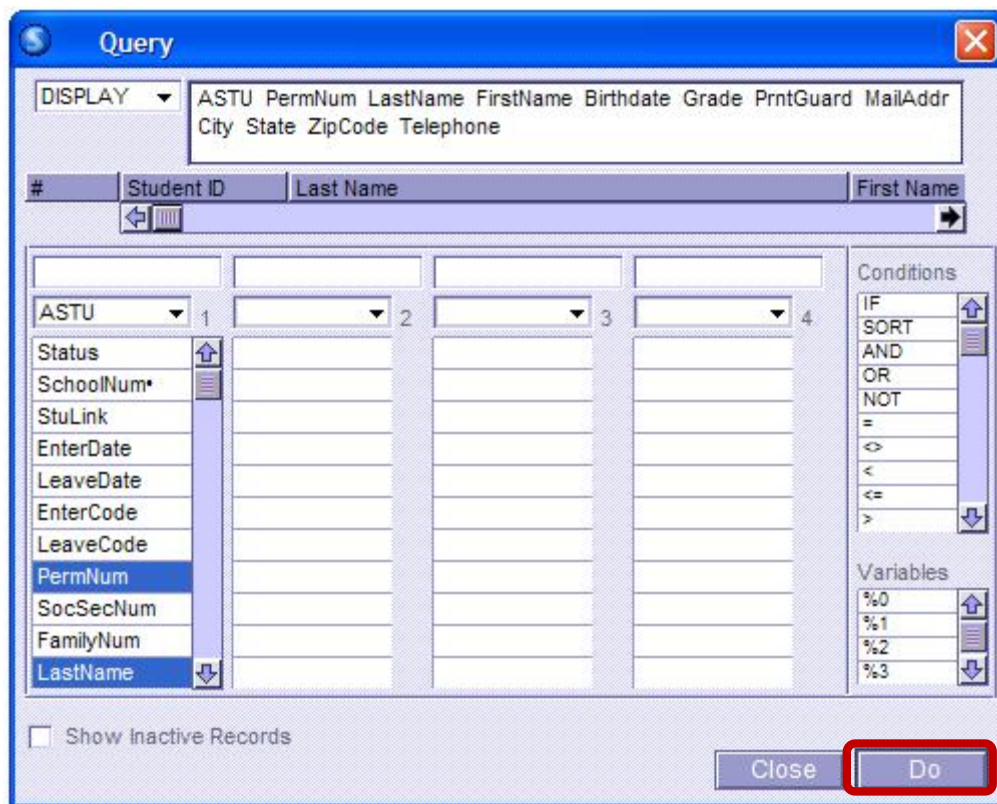
This procedure describes how to use a query in CLASSxp to export student data into Excel. The Excel data can then be merged into Word documents (form letters, envelopes, labels, etc.).

Querying CLASSxp

Sign into CLASSxp and open the class from which you would like to extract student data. To access the Query atom, double-click on the SASI Modules icon and scroll down to find the Utilities folder. Double-click on the Utilities folder and drag the Query icon onto a toolbar for easy access in the future.

When you open the query atom, copy the line below and paste it into the query window right after the word ASTU (be sure to insert a space between ASTU and PermNum). Your query atom should look similar to the screenshot below.

```
PermNum LastName FirstName Birthdate Grade PrntGuard MailAddr City State  
ZipCode Telephone
```

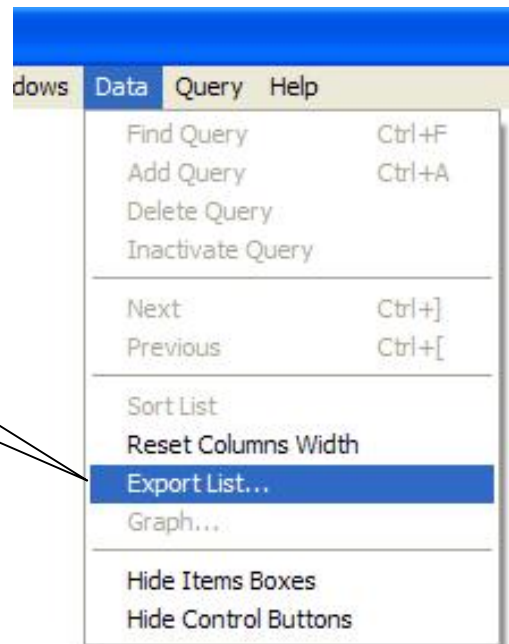


Click the **Do** button to run the query.

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Exporting the CLASSxp Data

To export the data, click on the **Data** menu at the top of the page and select **Export List...**

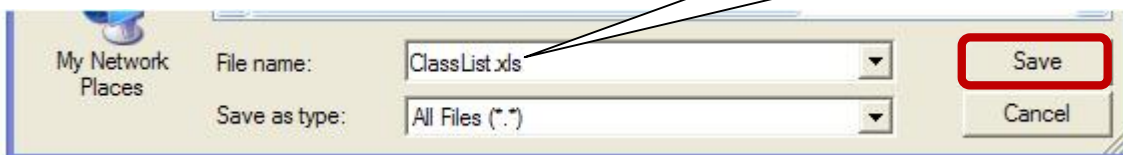


This will open an **Export file name** window.

Click on the dropdown arrow at the top of the window and choose to export the file to your **Desktop**.



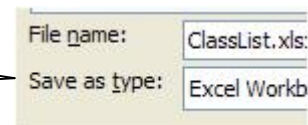
Name your exported file and give the file a **.xls** extension so that the file can easily be opened by Excel.



Click on the **Save** button.

Open the file you just saved to your desktop. You need to save this file as an Excel workbook file (it is currently a text file). After you open the file, click on the File menu at the top of the page and select **Save As...**

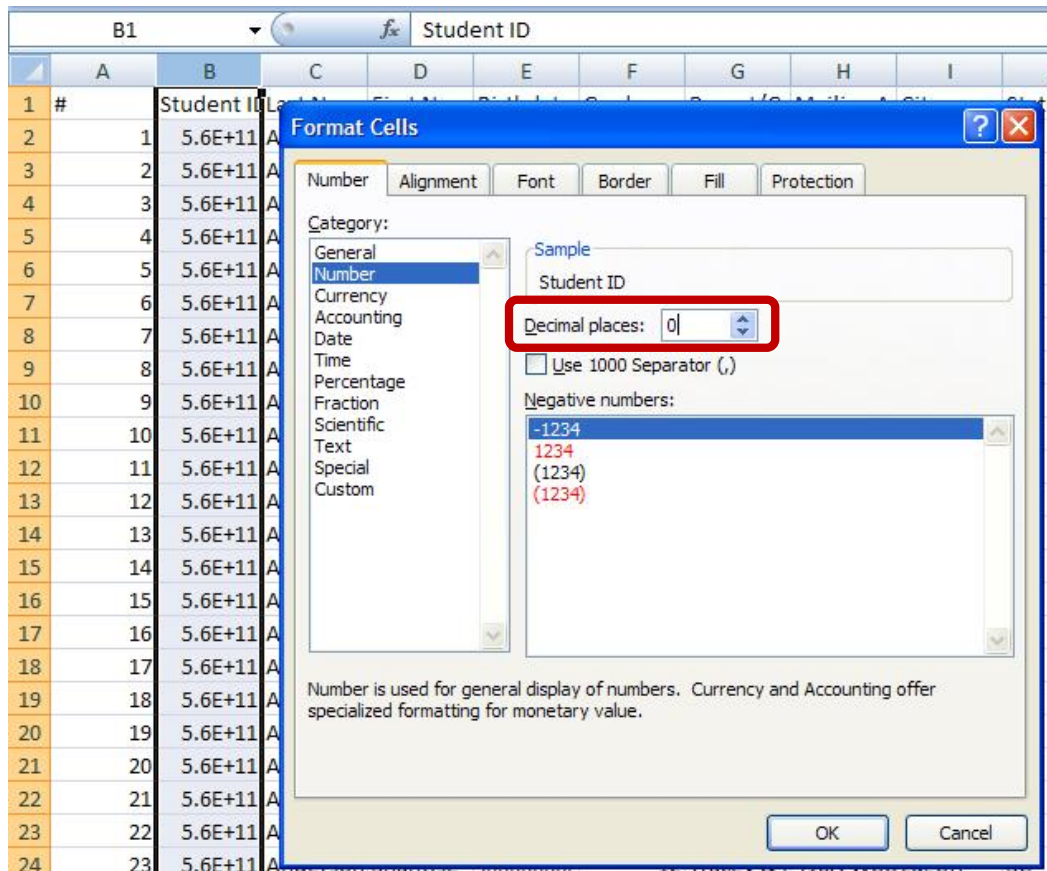
At the bottom of the Save As window, click the **Save as type** dropdown box and change the file to an Excel Workbook file. then click the **Save**



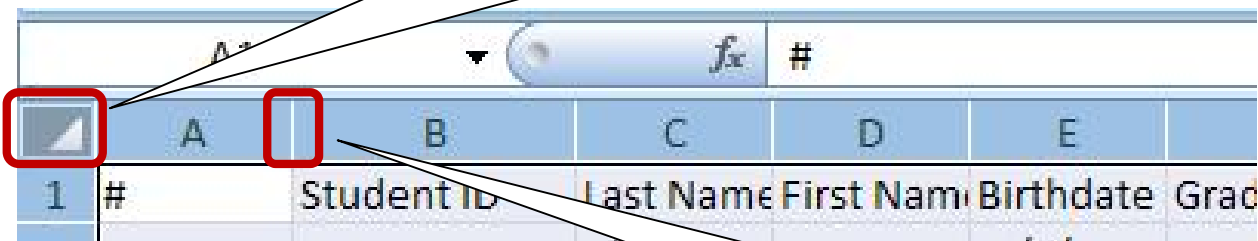
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Creating the Data Source in Excel

To format the Student IDs so they are readable, click on column B, then right-click and select Format Cells. Select the **Number** format and change the decimal places dropdown to **0** then click the **OK** button.



To resize all columns to accommodate the largest entry in the column, click on the space above the 1 in the first row and to the left of column A. This will select everything in the worksheet.



Then place your cursor on the dividing line between any two columns and double-click to resize all columns.

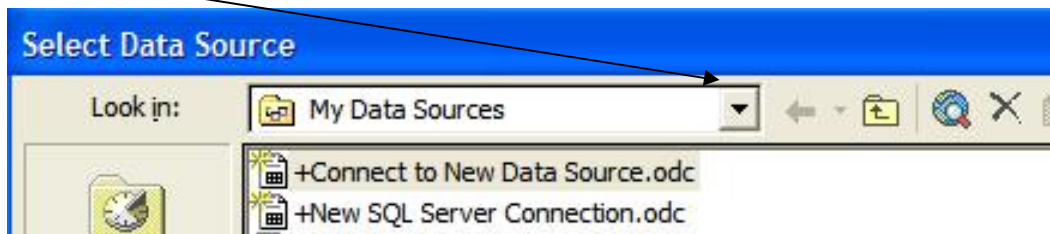
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Creating the Main Document in Word

Open Word and find your Mail Merge toolbar by clicking on the View menu, selecting Toolbars, and selecting the Mail Merge toolbar. All buttons on this toolbar except the first two will be grayed out (unavailable) until a data source is opened.

Click on the first button (Main document setup) and select the type of mail merge you wish to perform. Selecting Envelopes or Labels will bring up other dialog boxes that allow you to choose which type of envelope/label you wish to use. For all other types of mail merge applications, it is safe to accept the default setting (Normal Word document).

To join the data source to your Word document, click on the second button on the Mail Merge toolbar (Open Data Source). This will open a Select Data Source window with My Data Sources as the default location. Click the dropdown arrow and select Desktop to find the data source you exported from CLASSxp.



Find your Excel data source file and click on it, and then click on the Open button. If you select an Excel file with multiple worksheets as your data source, you will be presented with a Select Table window. Click on the sheet that contains your data source and then click on the OK button. The rest of the buttons on the Mail Merge toolbar are now active.

You can now insert merge fields into your letter, envelope, or mailing label by clicking on the **Insert Merge Fields** button on your Mail Merge toolbar (this will be the sixth button from the left). This opens an Insert Merge Fields window that shows the field names of your data source. Click on the field you wish to insert, and then click on the Insert button to insert the merge field into your document. Click on the Close button to close the Insert Merge Fields window. Continue this process until you have inserted all the necessary mail merge fields into your document.

Note: If you are creating labels, insert all the necessary fields into the first label, then click on the Propagate Labels button on the Mail Merge toolbar to populate the rest of the labels on the page.

When you are ready to merge the data source with the main document, click on the **Merge to New Document** button on your Mail Merge toolbar (this will be the fourth button from the right). This will open a Merge to New Document window that allows

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you to select which records you wish to merge. Accept the default (All) and click on the OK button. When you merge the main document with the data source, Word replaces the merge fields with the appropriate information from the data source.

This will automatically create a new Word document with all your merged data. Look over your finished merged document to ensure that the document is grammatically and syntactically correct. If you detect errors, correct them in your master merge document (the one with the «__» fields) and re-merge the data for further proofreading. Repeat these editing steps until you are comfortable that the document is to your liking.

Important: *Remember that you do not have to save the finished merged document (the one **without** the «__» fields), but you **DO** need to save the master merge document so that the merge relationship between your database and your form letter is preserved.*