

MS WORD Portfolio Project

Mail Merge

NOTE: Before you begin this project, I suggest you carefully read and/or complete the exercise located in the Handouts and Exhibits folder named *Help with Mail Merge*. I also suggest you carefully read/review the Sample Business Letter document behind the WORD tab in your portfolio.

Problem: As a teacher, you often need to create forms, memos, address labels, or letters that will be distributed to a large number of individuals. It would save time if you could create the main document one time, create the data source one time, and merge the two as needed.

You have planned an educational field trip to the University of Central Arkansas Library in Conway, Arkansas, on Wednesday, February 25, 2007, for your class. The students will be transported by bus, leaving the school at 8:30 a.m. and returning at 2:30 p.m. Each student should bring money for lunch and snacks (optional). The students should dress appropriately, as outlined in the student handbook. Students should not bring radios, cell phones, CD players, or other electronic devices. The assistant principal and two certified teachers will accompany the students. You want to provide a phone number in the event a parent/guardian needs additional information. You are attaching a permission slip that must be signed, dated, and returned to you by Wednesday, February 18. **All of this information is important and needs to be included in your letter to the parents/guardians.**

You have decided to use mail merge to address this problem. You want the letter to be more than just a form letter—**you want to use the parent/guardian name somewhere in the body of the letter and you want to use the student's name somewhere in the body of the letter.**

Ask yourself this question: What fields do I need in my main document? These are the fields you need in your data source. Examples include: Child's Name, Title (Mr., Mrs. etc.), First Name, Last Name, Address Line 1, Address Line 2, City, State, Zip, etc.

Directions:

1. Using the mail merge handout as your guide, create a main document letter. The letter should include the information as outlined in the problem above. Use 1" left, right, top, and bottom margins. Key the document in 12 point Times New Roman. Be sure to include an attachment notation (you are attaching a permission form). Do not include reference initials—you are keying your own letter. **Save** the document as **Field Trip Main Document** and **print** your main document. This main document will have fields where words will appear when the merging is complete (EXAMPLE: <<Child's Name>>)
2. Create a data source of six student records. You must decide what information should be included in the student record (Refer to the problem above). **Print** your database (student records). It may or may not fit on one page. I suggest printing the data source (student records) **after** you have completely finished the project.

****A note of caution:** After you create your database of six student records, you will be directed to save it to some location—**be sure you designate your auxiliary storage device or your personal network folder as the location.** You **MUST** locate it later to print it. It will be an ACCESS file. Just double click on it, and it will open. Find your database/table and print it. It may print on two pages or you can try changing to landscape orientation to get it on one page. See me if you have a problem finding your data source. You will be doing this on Skills Exam #1!

3. Merge the documents and **print** all six letters. Save the merged letters as your *first and last names and mail merge*. (Normally you would not save merged documents; you would simply choose **Merge to Printer.**)
4. Staple or clip and submit your project in this order: Rubric (for grading), main document, data source, and six merged letters.

STUDENT NAME _____ CLASS TIME _____

Word Portfolio Project

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Rubric

MUST BE SUBMITTED WITH THE PROJECT FOR GRADING

After grading, place the project and scored rubric where you found the directions and rubric in your portfolio—behind the WORD tab.

Description	Point Values	Points Earned
Letter was keyed using correct format, margins, and spacing (Refer to the Sample Business Letter handout behind the WORD tab in your portfolio)	40	
All fields were placed correctly , including the addition of punctuation and spacing (if applicable)	50	
Letter included all of the required information (go back to the directions and check again)	30	
Attachment notation was included	5	
Printed the main document (with fields displayed)	25	
Printed the data source (student records)	25	
Printed six merged letters	25	
Correct spelling, grammar, and punctuation —5 points for each error		
Total Points	200	

NOTES: