

# Church Office Automation

## Merging Data to Make Letters & Labels Part 2

### The Three Ways to Store Information

In last quarter's article, we discussed how to use Microsoft *Word* to perform mail merge functions. We first used *Word* to create a form letter. Next, we used *Word* to create a relationship between that form letter and a second document (which contained the information to be merged into the form letter). For this example, the second data source document was another *Word* file which had a table grid into which we were able to save information to be merged into the form letter. We saw that when we used the *Word* "mail merge wizard" to create this table file, we could see and edit information in a special screen showing all the information for one household at a time. In actuality, this *Word* table had **fields** for holding information such as first name, last name, street addresses, city, state and zip code.

Finally, in the previous article on mail merging, we noted that a Microsoft *Word* mail merge document is able to retrieve information from at least three kinds of documents:

- 1 For this example, we set up a Data Source file in a *Word* document containing a table but accessed it through the special mail merge wizard screen
- 2 Or we may keep the information in an *Excel* spreadsheet file — this method being a little better than the *Word* table if you know Microsoft *Excel*
- 3 Or we may choose to maintain our membership information in a Microsoft *Access* database file — the best method

While a *Word* table is a convenient way to store relatively small amounts of data for merging into a *Word* mail merge letter, labels or

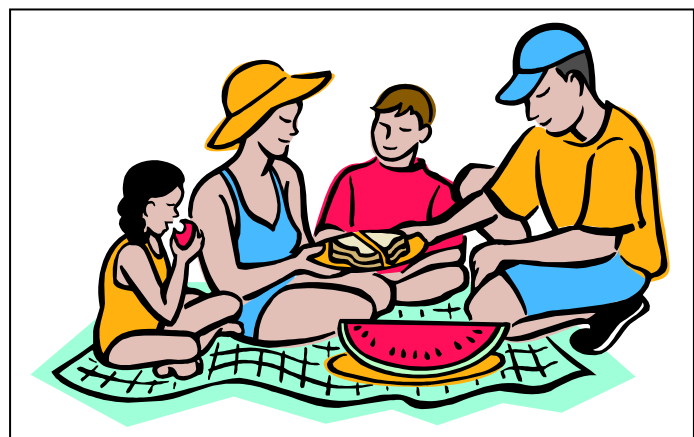
other documents for merging, it is not the best for managing a large number of records typical to church membership, committees, weddings, baptisms and confirmations. For easier sorting, an *Excel* spreadsheet would be preferred. For best overall editing, sorting and extracting a few or many selected records, Microsoft *Access* is the program of choice.

Most organizations normally use a database program, such as Microsoft *Access*, to maintain their membership (or client) information. Database programs are the skeleton of the body of work of all profit and non-profit organizations.



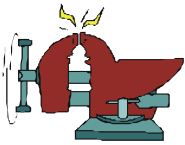















**Rule of Thumb: A table is the essential structure of a *Word* table, an *Excel* spreadsheet and an *Access* database file**

To explain the nature of a table, here is a metaphor. Imagine a very neurotic and overly organized household of perfectionists. They are Presbyterians off the deep end — good for our illustration but unfortunate for the fictitious members of the household. The Perfectionist household consists of Sarah and her husband Rupert and their two children Suzzie and Ziggy.



The Perfectionists *never* leave anything on the floor or even in chests of drawers. Instead, each wall in their home is covered with five

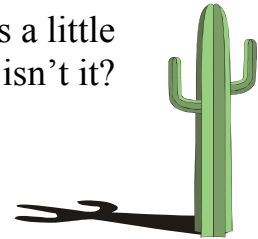
bookshelves. They store *all* of their belongings on these five-shelf wall storage areas around the house. The picture below shows a wall holding one of these five-shelf storage areas. ↓

Owner	Tools	Toys	Balls	Bikes
Sarah				
Rupert				
Suzzie				
Ziggy				

On this wall, shelves 2-5 have the family member's name to the left. On the wall behind the boards, Sarah and Rupert have drawn vertical lines from top to bottom. Across the top board and in-between the vertical lines are the names of the columns for various kinds of items. As you can see, there are columns for tools, toys, balls and bikes.

Since each member of the household is assigned a board (or shelf) of their own for these kinds of items, it is expected that they put their tool, for instance, on their shelf in the tool column and their own toy on their shelf in line with the toy column. In short, on any given day, if a member of the Perfectionist household wanted to locate their tool, they would merely look on their row and under the relevant column and find their belonging. They would easily find their possession — provided they placed it in the proper row and column. Simple, neurotic, unrealistic (in real life) but exactly how a computer table functions. Thank goodness we don't live in a computer.

This subject is a little dry, isn't it?



Now if the above pictured items were entered into an *Excel* spread sheet or an *Access* table, it might look like this with words instead of pictures. ↓

Owner	Tools	Toys	Balls	Bikes
<b>Sarah</b>	Anvil	Books	Volleyball	10 speed racer
<b>Rupert</b>	Hammer	Computer	Football	26" bike
<b>Suzzie</b>	Binoculars	Wagon	Soccer Ball	15" bike
<b>Ziggy</b>	Toy Blocks	Rocking Horse	Beach Ball	Tricycle

So in any **table** file, first there are **columns** (for holding certain kinds of information). These columns are also referred to as “fields.” Secondly, in a table, there are **rows** (or “records”). Just as there was a shelf for every member of the Perfectionist household, there is a row (or “record”) for every person in a table of church members. The different columns (or fields) vary, depending on what kinds of information your organization wants to retain.

### Maintaining Information in *Excel* or *Access* Tables

You will obviously have to learn how to use Microsoft *Excel* or *Access* in order to manage your organization’s membership information in these programs. Knowing how to set up a table in *Excel* or in an *Access* database file will require investing in a course or learning it on your own. New Horizons, ExecuTrain and CompUSA have classes on this software. Most often, they have Beginning, Intermediate and Advanced level courses. Before you sign up for one of these classes, be very sure you have the computer hardware and software beforehand. Once you take a class, it is essential that you immediately use the class material and work with the program on a daily basis. Taking such a course without being able to use it every day will only cause you great frustration — unless, of course, you have an exacting photographic memory with infinite recall.

When you do take the course, be sure to come home with not only the class booklet but a diskette with the class work files in their original form. Doing this will enable you to go through the class materials as many times as you’d like.

### Performing a Mail Merge Function in *Word* and Using an *Excel* or *Access* Table As Your Data Source.

At this point, let’s say you have already chosen to maintain your organization’s membership records in Microsoft *Access*. You have already done the hours of planning and the work to create the desired fields in an *Access* table and this database is stored in your **C** drive in a directory called **databases**. The name of the *Access* database is **ChurchMembers.mdb**.

For this example, we’ll say that you have also created a “query” in *Access* that automatically selects only church members who are now serving on the Christian Education committee. You have saved this query in the *Access* database with the name **CE Committee**.

You will need to remember that the name and location of your data source document, in this example, is:

**C:\databases\ChurchMembers.mdb**

Remembering the previous article’s example, you have already created a form letter that is going out to everyone on the Christian Education Committee. The letter’s name is:

**CE Letter.doc**

Having brought this mail merge document up on your screen in Microsoft *Word*, you would next create a merging relationship between this

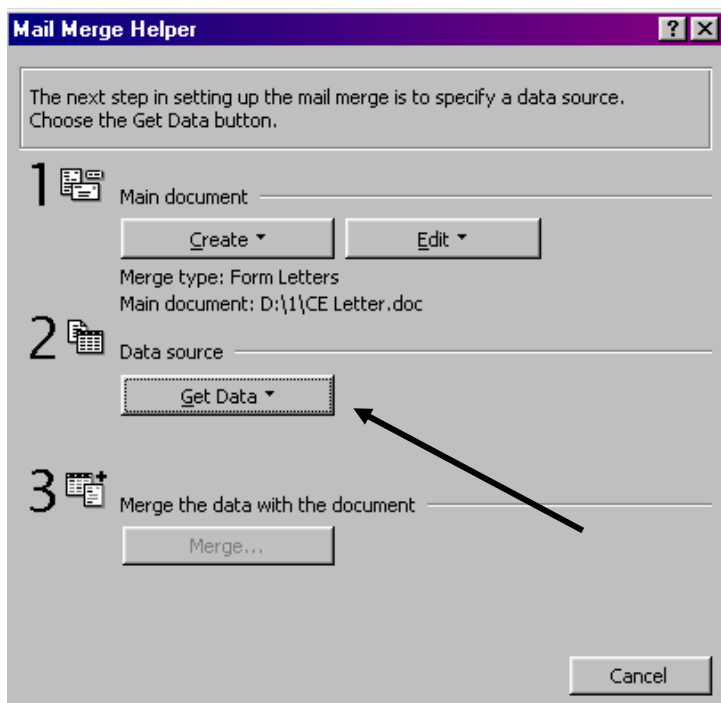
form letter and your *Access* database which is called: ChurchMembers.mdb.

Now it happens that this CE Letter.doc has already been configured (from our example in the previous article on merging) to obtain information for a merge from a *Word* table file. We're going to change it. We're going to tell the merge form letter to get its information from an *Access* database file instead of the *Word* file (used in the last article's example).

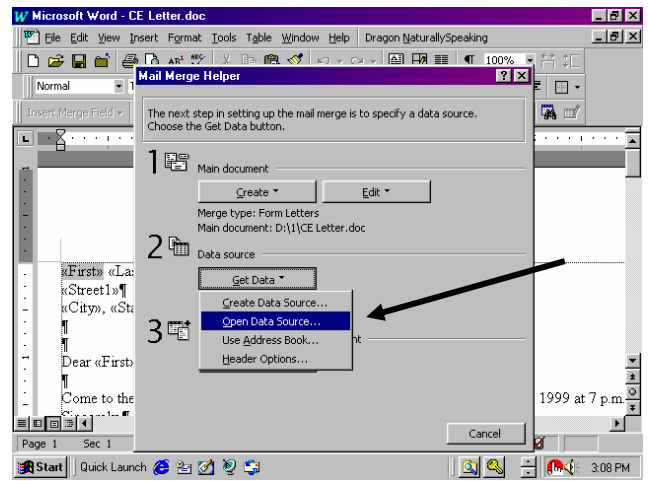
To do so, click on the tool button entitled Mail Merge Helper.



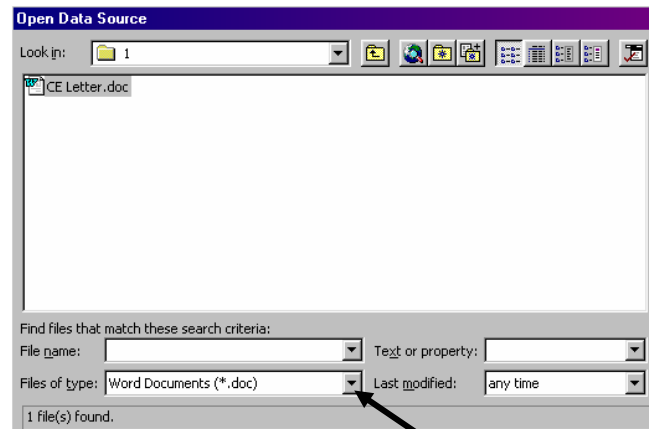
You will be presented with this Mail Merge Helper screen: ↓



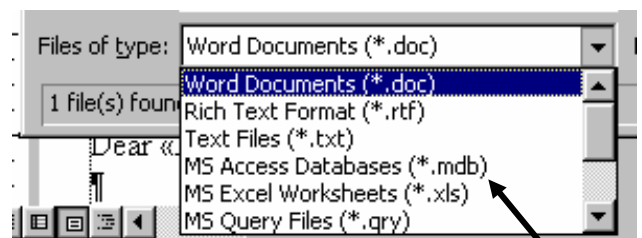
In section #2, click on the “Get Data” button (see arrow) and you will be brought to this screen (see top of next column). ↗



To open an existing file containing data, click on “Open Data Source” (see arrow above) and you will be presented with the following screen. ↓

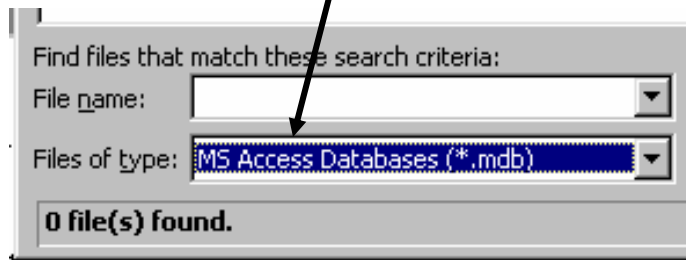


In this screen, click on the choice arrow of Files of type: and you will see these choices for file types: ↓

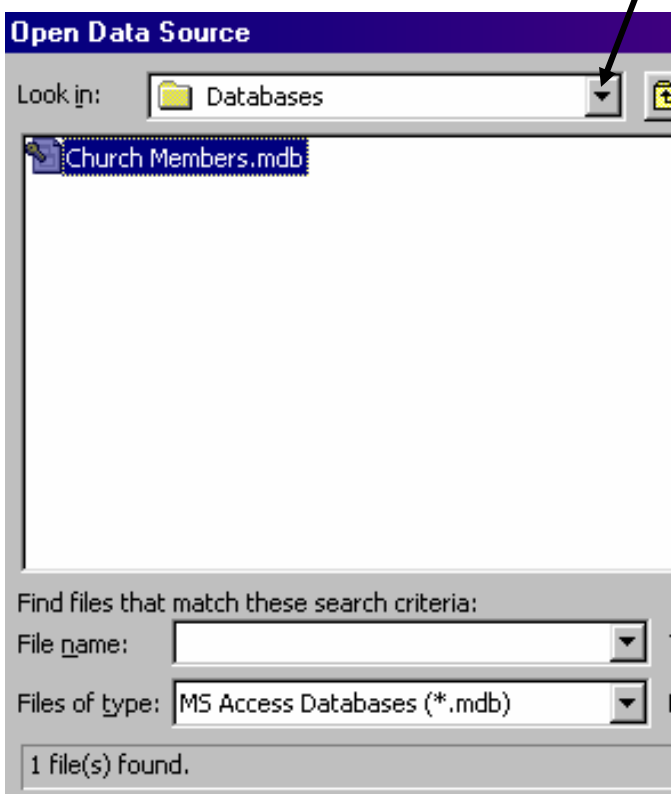


Choose MS Access Databases (\*.mdb). [Notice, in passing, you would be able to pick MS Excel Worksheets (\*.xls) if you were keeping your membership records in a Microsoft Excel spreadsheet.]

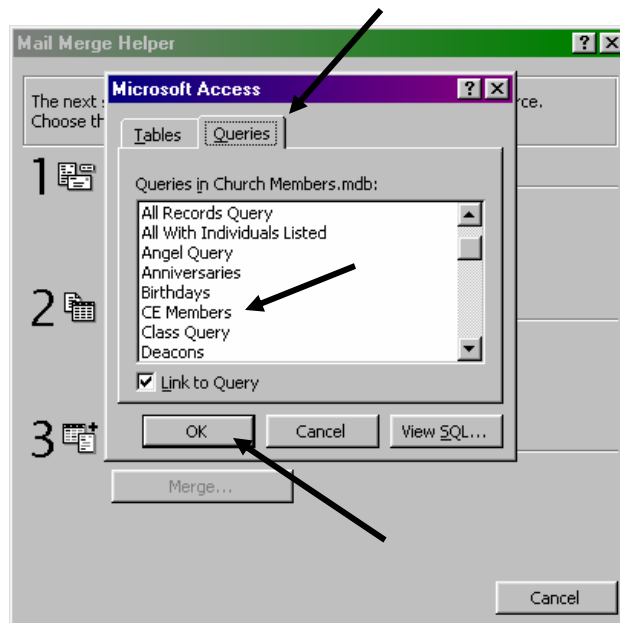
Choosing this file type will change the Files of Type line to this:



Next, use your browser movement buttons to go to the drive and directory containing your Access database ChurchMembers.mdb.

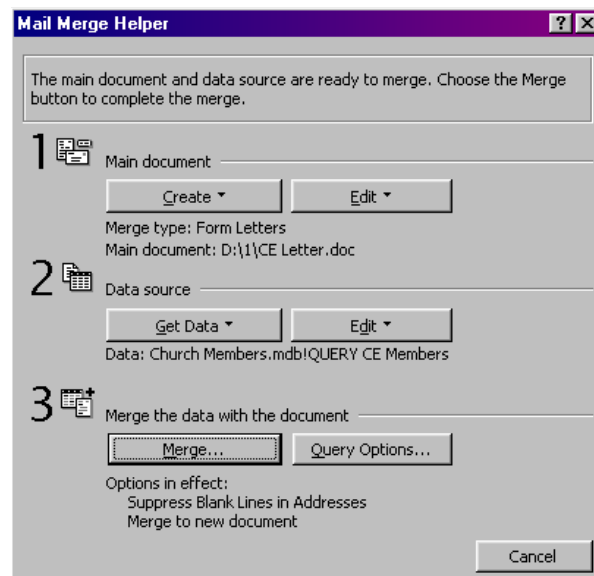


Once you click on the name of your database, click the **Open** button in the top right corner of this dialogue box. Because you have selected an Access database file, the program will take a few seconds longer and show you the following screen (see top of next column). ↗



The program is waiting for you to link the form letter to a **table** or a **query** in this database. Click on the tab for **Queries** (top arrow) and then scroll down (if necessary) to select the **CE Members** query (second arrow points to it) and finally click on the **OK** button (bottom arrow points to it).

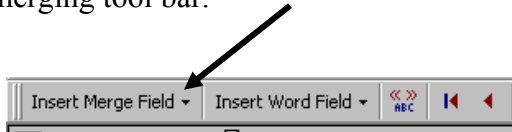
Next, you will see this screen (below). This **Mail Merge Helper** window shows that the form letter file and the data source file are set in their proper relationship.



If you have your merge codes in place in your form letter, you *could* perform the merge from this screen (in part 3). Instead, click on the

Cancel button in the lower right corner to return to the merge letter.

You are now back in your form letter, so check to see if you have the correct merge fields placed where you'd like them on the page. To insert a merge field at your cursor position, click on the **Insert Merge Field** button on the merging tool bar.



Once you are satisfied that you have your form letter set up, save it again and perform the merge. It is best to perform the “merge to new document” operation, allowing you to preview several pages that have the information on them *before* they are actually printed. To perform this preview merge, click on the **Merge To New Document** button on the merge toolbar.



You will see the program go through the work of adding the data from each record in the *Access* database until you finally see the first page (of many) of the merged form letters.

At this point, you would typically page through this new document until you are satisfied that the letters have been produced properly. When satisfied, you would print them as you would any *Word* file.

After printing the letters, you do not have to save this document with the merged information in it. Simply close this document without saving it and you will be returned to your original form letter (*CE Letter.doc*) which shows the merge codes in it. Save it and exit. If you are asked if you want to save the accompanying data file, always reply **Yes**.



## Coming Articles

Next quarter's article will be about using e-mail on the Internet to expand the church's ministry to its members.

This article was written entirely in Microsoft *Word*. Because of the many screen captures, which regularly use half-toned images, we decided not to drop the quality of resolution down to a second-generation photocopy version with only a 300 dot per inch resolution. Instead, these six pages were printed on a Hewlett-Packard LaserJet 4000 printer which has a terrific 1,200 dots per inch resolution. The relatively small number of copies produced were such that we had the resource of time permitting this higher quality.



Screen captured pictures were made using *Print Screen Deluxe* software. Windows and dialogue boxes were captured to the *Print Screen Deluxe* program from within *Word* and *Access* and then dropped into text boxes throughout this article.

The *Print Screen Deluxe* program enables you to tap your **Print Scrn** key and draw a rectangle around anything on the screen you would like saved as a clip art file (or more immediately dumped into a “text box” in *Word* to hold the picture). To obtain a copy of this software, visit the American Systems web site at: <http://www.americansys.com/> and order their CD for \$29.85. See also the newer *SnagIt* software by TechSmith located at:

<http://www.techsmith.com/>

If you would like to contribute an article or lead a “how-to” demonstration with a little of your computer wizardry, drop an email to:



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