

**Palm Beach Community College**

**Academic Affairs**

**Procedure for Mail Merge – Printing Awards of Achievement**

**September 2007**

**Document located at: <http://www.pbcc.edu/x13055.xml>**

The following steps can be followed to automate the production of awards of achievement for CCE courses. In all cases, the standard template for Awards of Achievement should be used as designed by CRM. You may add and design your own text to complete the award including dates and signature lines with approval by your supervisor. If you are including a scanned signature, make sure the person has authorized use of their signature. In no case should Dr. Gallon’s signature be included on the award of achievement, unless his office has approved of such use.

The instructions below assume the user has knowledge of how to run batch jobs, how to save files to the computer, how to edit files, working with comma delimited files and the basics of mail merge.

1. **Produce data file to be used in the mail merge** – Run program **XSR153J1**, which is located in the student system: ST, JS, CU (if you are not familiar with running batch jobs, please refer to Section F of the Academic Management Manual [http://www.pbcc.edu/documents/academic\\_services/sectionf.pdf](http://www.pbcc.edu/documents/academic_services/sectionf.pdf)). If you do not have security access to run batch jobs, please ask your supervisor to request adding this to your security profile.

**The program has many settings:**

```
Run Status...: Pending
*Action (A,M,P,N,D,C)      AD      Requested on: 09/05/2007 at: 08:59:10.7
      Job Name: XSR153J1 XSR153J1 STUDENTS BY COURSE OR >
      Run Nbr.:          Run Now: _ (N/Y)
Parameters                Value                Text
1 of 50 1 Start Term (CCYYTT).....: _____ >
      2 End Term (CCYYTT).....: _____ >
      3 Credit Type.....: _ >
      4 Course Id.....: _____ >
      5 HEADER RECORD FOR DOWNLOAD...: _ >
      6 SHOW STUDENT-ID (Y OR N).....: _ >
      7 Email userid at pbcc.edu.....: _____ >
      8 Reference Number 1.....: _____ >
      9 Reference Number 2.....: _____ >
     10 Reference Number 3.....: _____ >
     11 Reference Number 4.....: _____ >
     12 Reference Number 5.....: _____ >
      Number of Report Copies: _ *PrinterDest: _____
```

The program has 12 different items to set depending on how much data you need. For this application, you would run all data for a particular course, or just for selected reference numbers.

**For a specific course:**

```

- Maintain Run Jobs -                               1 more
Run Status...: Completed
Action (A,M,P,N,D,C)   DI      Requested on: 09/04/2007 at: 10:07:45.3
Job Name: XSR153J1 XSR153J1 STUDENTS BY COURSE OR >
Run Nbr.: 222   Run Now: _ (N/Y)
Parameters          Value          Text
1 of 50 1 Start Term (CCYYTT).....: 20081_   >
2 End Term (CCYYTT).....: 20081_   >
3 Credit Type.....: N   >
4 Course Id.....: TIO0950___ >
5 HEADER RECORD FOR DOWNLOAD...: Y   >
6 SHOW STUDENT-ID (Y OR N).....: N   >
7 Email userid at pbcc.edu.....: BARRETTS_____ >
8 Reference Number 1.....: _____ >
9 Reference Number 2.....: _____ >
10 Reference Number 3.....: _____ >
11 Reference Number 4.....: _____ >
12 Reference Number 5.....: _____ >

```

**Fields you must provide:**

1. Start Term – term from which you want to pull records
2. End Term – usually the same as in item 1
3. Credit Type – N for noncredit
4. Course ID – Course number for the course you want
5. Header record – provides header record – needed for mail merge
6. Show student ID – usually set to N
7. Email – provide your email address (without the @pbcc.edu)

## For Specific Reference Numbers:

```
Run Status..: Submitted
Action (A,M,P,N,D,C)   DI   Requested on: 09/05/2007 at: 09:08:56.6
Job Name: XSR153J1 XSR153J1 STUDENTS BY COURSE OR >
Run Nbr.: 223   Run Now: N (N/Y)
Parameters              Value              Text
1 of 50 1 Start Term (CCYYTT).....: _____ >
2 End Term (CCYYTT).....: _____ >
3 Credit Type.....: _ >
4 Course Id.....: _____ >
5 HEADER RECORD FOR DOWNLOAD...: Y >
6 SHOW STUDENT-ID (Y OR N).....: N >
7 Email userid at pbcc.edu.....: PEDERSEG_____ >
8 Reference Number 1.....: 108372 >
9 Reference Number 2.....: 108373 >
10 Reference Number 3.....: _____ >
11 Reference Number 4.....: _____ >
12 Reference Number 5.....: _____ >
Number of Report Copies: 1_ *PrinterDest: WEB_____
```

### Fields you must provide:

1. Header record – Y for mail merge
  2. Show Student ID – Y or N
  3. Email – provide your email address without the @pbcc.edu
  4. Reference number – at least one but not more than 5 per run
- 
2. **Design your award in Word** – Set up the text needed to print on the award, including any signatures. To speed printing, you may scan signatures and place them on the document as an image file. Please make sure you have authority to use a signature. Please do not use the word “certificate” anywhere in the text of your award.
  3. **Examine data file to be merged and edit if needed** – If you successfully ran the XSR153 program, you should have a data set in your email in-box. This data file has the following fields:

LAST NAME,FIRST NAME,MIDDLE NAME,STDNT ID,STREET,CITY,ST,ZIP CODE,HOME  
PHONE,WORK PHONE,PROG,E-MAIL ADRESS,REFERE,

The file is set up as a “comma delimited” which means that each field mentioned above is separated by a comma. If two or more commas appear together, it means that the student did not have any data.

For example: SMITH, JOHN, ,,1000 MAIN STREET would mean that John Smith did not supply a middle name and the program was run not to supply student ID.

Each person’s data occupies one line in the data file. This data file includes all students who took the course. If you only want students who received an “S” in the course or another grade that

indicates passing, you will have to manually delete the lines of the students who did not pass before you print the awards. This can be done in Notepad.

You must save the file to your computer prior to attempting the merge. Please make a note of the file name and folder to which you saved the file. If you want to print awards for all participants regardless of grade, you do not need to edit the file, but you still need to save it to your computer.

4. **Set up mail merge fields in your Word Document** – Assuming you are using Office 2007, it is recommended that you use the mailings tab. You may follow the wizard or set up fields and then save your template. If you are unfamiliar with setting up and using a mail merge, it is recommended that you receive training in this area through Human Resources. Full training in mail merge is beyond the scope of this document.
5. **Merge and print your documents** – if you successfully placed your fields, you should have merged and printed your awards. Remember, if you set up a template with the merge fields, you may use this for future classes by just editing the text as appropriate for a particular class.

The data file also has other uses in that you may email all participants in a class to alert them to a future class. When performing such tasks, please follow any guidelines as developed by your campus or supervisor.

**Spending a few hours learning these techniques can save hundreds of hours over a year over producing awards manually!**