This is a two part procedure:

- 1. Preparing an excel file for Name and Address List (page 1)
- 2. Convert excel member database file to Word Document (page 5)

## Prepare the Excel file for "Name and Address" List

4-1-2010

The Excel document should contain only **Flag Members**, **Honorary Members** and **Associate Members** (Exclude "Foghorn" and "Waiting" entries)

## **Formatting the spreadsheet**

- Open Excel
- Insert the names of the fields in the first row of the Excel spreadsheet ("LastName", FirstName, ...)
  You can cut-n-paste the field names shown below into columns A-N of the first row into the
  - spreadsheet. Don't worry about how the field names look below they will paste just fine.

LastN	FirstN	Oth	Addr	Ci	Sta	Zi	Pho		Mem	AnivD	Dues		Search
ame	ame	er	ess	ty	te	р	ne	Email	ber	ate	Paid	BoatInfo	Terms

• Click in the second row, first cell (A2). This will cause the imported data to begin in the second row (e.g., below the field names in the first row) See figure 1 below



## **Importing the data (membfile.dat)**

• Click on **Data**, then> **Import External Data**, then> **Import Data**. You will see the menu in Figure 2 below.



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• Select "All Files (\*.\*) in the Files of type: drop down box at bottom of the menu – as shown below in **figure 3**. Now you will be able to browse to the membfile.dat file that will be 'imported.'



Figure 3

- Work your way to the membfile.dat file, and then select <u>Open</u>. You will see the menu shown in **figure 4**.
  - Select **Delimited**
  - Select 1 for the **Start import at row**: box. (This refers to row 1 of the membfile.dat file)
  - o Select Next>

Text Import Wizard - Step 1 of 3	?×
The Text Wizard has determined that your data is Fixed Width. If this is correct, choose Next, or choose the data type that best describes your data. Original data type Choose the file type that best describes your data: Opelimited Characters such as commas or tabs separate each field. Fixed width Fields are aligned in columns with spaces between each field.	
Start import at row: 1 😴 File origin: 437 : OEM United States	~
Preview of file G: [Documents and Settings]/Michael Doj/Wy Documents]/Michael Doj/Wy Document	in ^2 -2 16 13 57 🗸
	>
Cancel < Back <u>N</u> ext > <u>F</u> ini	sh

Figure 4

- Next you will see the menu in **Figure 5**.
  - Under Delimiters, select **Other** (you may have to deselect **Tab**.
  - Enter | in the box next to  $\underline{O}$ ther:
  - Then select **Finish** at the bottom right

This screen linew your te:	ets you set the delimiters <t affected="" in="" is="" previe<="" th="" the=""><th>your data cor w below.</th><th>itains. You can se</th><th>96</th><th></th></t>	your data cor w below.	itains. You can se	96	
Delimiters	Semicolon [ Qther: ]	Comma	Treat conse	cutive delimiters as one er:	•
Abshire Abshire Andresen Anthony Anthony Anthony	Anita Sharon Andrew & Cynthia Bram & Debbie Doug	- 321 1580 2488 575 418	Vista Dr 10th St Starling Dr Hill St Beech Street	Arroyo Grande Los Osos Paso Robles San Luis Obispo Arroyo Grande	

Figure 5

- Next you will see the menu in **Figure 6**.
  - Select Existing worksheet:
  - Make sure the box says =\$A\$2 (this means beginning at column A, Row 2) which is just after the header row
  - Select **OK** and you will see your completed Spreadsheet

OK Cancel
Edit Query

- The spreadsheet will look like **Figure 7** (which is a partial view of the spreadsheet)
  - The spreadsheet includes the following 'Member' categories (column J 'Member'):
    - Flag | Honorary | Associate | Foghorn | Waiting |
  - The Foghorn & Waiting categories must be removed.
- Remove Foghorn & Waiting categories
  - The easiest way (I think) is to sort on column J, which will group each of the categories.
    - Delete the rows that contain Foghorn and/or Waiting (they will be together)
    - After deletion, sort on column A (LastName) to return the spreadsheet to the original sort.
  - Save the spreadsheet as **Datfile.xls**.
  - The next step will be to merge this file into a Word Document, utilizing **SLYC Dir Format.doc**. See the instructions for making the Word Document

	A2	✓ f Anc	Iresen							
		A	В	С	D	E	F	G	Н	
1	LastName		FirstName	Other	Address	City	Stat	Zip	Phone	Email
2	Andresen		Sharon		1580 10th St	Los Osos	CA	93402	528-4728, 756-2020(w), 459-3868 (c)	sandrese@calpoly.edu
3	Anthony		Andrew & Cynthia		2488 Starling Dr	Paso Robles	CA	93446-4703	459-0978 (c), 610-0786 (c)	cynthia_anthony@hotn
4	Anthony		Bram & Debbie		575 Hill St	San Luis Obispo	CA	93401	543-7513	debanthony55@gmail.c
5	Anthony		Doug		418 Beech Street	Arroyo Grande	CA	93420	481-2757	danthony2@charter.ne
6	Arthur		Bob & Cherrie		14315 Talon Grove Dr.	Bakersfield	CA	93306	661-872-4010/661-319-5949	rarthur1@bak.rr.com
7	Aycock		Anthony		558 S. 13th St.	Grover Beach	CA	93433	710-1689	
8	Barrett		Chris & Elizabeth		1340 Newport Ave	Arroyo Grande	CA	93420	481-1955	chris.e.barrett@lmco.c
9	Barrett		Mike & Jan	-	7660 Rocky Terrace	Creston	CA	93432	237-1816	m32b64@wildblue.net
10	Baxter		John	& Joan Andre	4428 Sunflower Way	San Luis Obispo	CA	93401	542-0737	jrbax@aol.com
11	Bellis		Mary	Midn, USN	P.O. Box 11200	Annapolis	MD	21412		M100384@usna.edu

Figure 7

## **Convert Member Database in Excel form to a Word Document with "Name & Address" List** 4-1-2010

- 1. Open "SLYC Dir Format.doc" (this is the main mail merge document)
  - The Select Data Source menu (figure 1) will open
  - Select (\*.xls) in *Files of type:* dropdown menu
  - Browse your way to the **datfile.xls** file you created from the **membfile.dat** file, then click <u>Open</u>

Select Data So	urce						? 🔀
Look in:	📴 My Data	Sources	<ul><li>✓ ④</li></ul>	- 🗖   🤅	a, 🗙 💼 🗉	🔹 Tools 🕶	
My Recent Documents Desktop My Documents My Documents	+Connect	to New Data Source.od Server Connection.odc					
My Network	File <u>n</u> ame:			~	New Source		ipen
Places	Files of type:	All Data Sources (*.od	c; *.mdb; *	°.mde 💙		0	ancel

Figure 1

- 2. The *Select Table* menu will pop up, shown in **Figure 2** below.
  - Make sure Sheet1\$ is selected and First row of data contains column headers is selected
  - Click OK

Name	Description	Modified	Created	Туре
III Sheet1\$		3/27/2010 2:35:10 PM	3/27/2010 2:35:10 PM	TABLE
🔟 Sheet1\$membfile		3/27/2010 2:35:10 PM	3/27/2010 2:35:10 PM	TABLE
III Sheet2\$		3/27/2010 2:35:10 PM	3/27/2010 2:35:10 PM	TABLE
III Sheet3\$		3/27/2010 2:35:10 PM	3/27/2010 2:35:10 PM	TABLE
		101		ŋ

Figure 2

3. A preview page will come up, as shown in **Figure 3**.

	«LastName», «FirstName» «Other»¶ «Address»¶ «City», · «State» · · «Zip»¶ «Phone»¶ «Email»¶ <i>«BoatInfo»</i> ¶ ¶
	Figure 3
4.	Select Tools > Letters & Mailing > Mail Merge
	Select recipients



8. You will see a preview of the directory (first entry) as shown in Figure 4



- 11. A Merge to New Document menu will appear as shown in Figure 5
- Select *All*, then click OK

Merge to N	lew Docu	iment		×
Merge record	ds IIII			
	ana sa ang s			
Curren	t record	i	-	_
O From:		<u>I</u> o:		
	ОК		Cancel	
	Figu	ire 5		

12. You will see the directory of members, in one long column (30+ pages), as shown in **Figure 6** 13. Save this list (suitable name) for future use

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later and the m	
America CA 02420	
ATTO YO CHAILE, CA - 95420	
antalaosine@yaloo.com	
Andresen Sharon.	
1580-10th-St¶	
Los Osos (CA93402¶	
528-4728 ·756-2020(w) ·459-3868 (c)¶	
sandrese@calpoly_edu¶	
1	
Anthony, Andrew & Cynthia ¶	
2488-Starling-Dr¶	
Paso-Robles, CA-93446-4703¶	
459-0978-(c).··610-0786-(c)¶	
cynthia anthony@hotmail.com, aanthonymd@hotmail.com¶	
Sea Symphony Pearson 30"	
1	
Änthony, Bram & Debbie ¶	
575 Hill St	
San Luis Obispo, CA-93401¶	
543-7513¶	
debanthony55@gmail.com¶	
'Sea-Symphony ' Pearson 30'	
1	
Anthony, Doug ¶	
418:Beech: Street	
Arroyo Grande, CA-93420	
481-2757]	
danthony2@charter.net"	
Sea Symphony - Fearson 30"	
Figure 6	