

These notes are only a guide to the material we are covering in today's brief one hour class. There are many sources of additional information and alternate techniques such as the document on which I based the presentation. See <http://blog.worldlabel.com/mailmergeforWL.pdf> for that 29 page document.

Introduction

Mailmerge is an old technique for combining data (such as names and addresses) with a form document to produce form letters, labels, and other documents tailored for each record in the data (person, etc.). Open Office is just one of many programs able to accomplish a mailmerge.

There are basically three steps to doing a mailmerge. While each step can be done in different ways, they are still the same three steps.

1. Decide what information we need for the task, where to get it and gather it together.
2. Make a database or source containing that data.
3. Create a document which can be printed for each "record" filling in words from the database in the appropriate spots.

The Sample Task

The two examples we cover today are part of a single task to create a Christmas letter and personalize it for each person we send them to and to make labels for all the envelopes so we do not have to write them out by hand. Obviously we need the names and addresses for each person, and lets include their phone number and email address so we can ask them to validate our information. There may not be a single source for all that information. So we will get some of it from an email address book and type in some of it from other sources to get it all in one place. One convenient tool for that is to make a spreadsheet with all the information in it.

The Real Task

Step 1

Export information from your email address book. This may even include all the data needed, but is a good start in any case.

- Windows Outlook Express: Use the File menu selection for Export to export the Export the information we want from an Outlook Express Address book as a .csv (Comma Separated Value) file. Notice that there are many fields there we do not need so we can choose which ones to use by checking or clearing the boxes for each field. Notice also that the names of the fields will also be exported. Save the file using a name and location of your choice. Close Outlook Express.
- Thunderbird (Windows or Linux): Open the Address book. If you have more than one address book in the left panel, select the one you want and then use the Tools/Export/... menu to get to the dialog to choose the file name, location, and format (LDIF, CSV, or Tab Delimited). Note that LDIF is a format for mail clients and does not import into a spreadsheet well. Close Thunderbird.

- Evolution: Evolution is harder in that there seems to be no way to do it from the GUI. So open a terminal and type “`evolution-addressbook-export –format=csv > contacts.csv`” to export it. See the man page for more information. Close the terminal.

Start Open Office and choose to create a new spreadsheet. Open the .csv file that was saved. Optionally delete any columns not needed or add any new ones desired. Check the data and type in any information that was missing from the email address book data. Just in case we want to add other address books later, lets name this tab of the workbook. Double click on the tab at the bottom and type in a name for this sheet. Use “Save As” on the File menu to save the spreadsheet using a name related to our task AND as a spreadsheet, not a CSV file. Close just the spreadsheet workbook, or close OpenOffice as you choose.

Step 2

Start Open Office if it is not already running and choose to start a new database or if you are still in Open Office, start a new database (File/New/Database or use the “New” icon at the left of the toolbar. The database wizard comes up and in this case you want to connect to an existing database which is our spreadsheet we saved. Select the connect radio button and choose Spreadsheet from the drop down list. Click on next to browse to the spreadsheet file we saved. Ensure the “Yes, register ...” button is on but clear the checkbox to “Open the database for editing” before clicking on Finish.

Step 3

Still in Open Office, start a new text file for our letter. Type into the letter just as you would for any letter. When you get to the first place where you want to use data which changes for each copy of the letter, do one of two things; hit **F4** or use the “Insert/Fields/Other...” menu. They do the same thing but look different so use whichever you prefer.

We demonstrate the **F4** technique. A new section opens with a list of possible sources at the left. Once you select one a table of field names and values fills the right side. If you drag a field name into the letter you get a placeholder for that field. If you drag a data value (one cell) you get that data in the letter and it will be the same in every copy you print.

[I think you can define an envelope to print with each letter but have not researched it]

Once the letter is done you can print it. Open Office sees you have mail merge data in the letter and lets you choose whether to print it as a form letter and select for which records to do so. You can choose to print letters for all records, records from 1 to whatever, or even letters for only the row(s) you select (use the control key to select separated records).

Still in Open Office, start a new “Labels” document. This starts a wizard that lets you select the type or layout of label paper, to use your address or get mailmerge data from a database, etc. Unfortunately, the placeholders look different and the interface is different and I have no space left to describe the details here.

NOTE for envelopes

OpenOffice has somewhat poor support for envelopes, but go to <http://openoffice.blogs.com/> and click on “envelopes” in the right hand column to find a good article on doing them.