Example Microsoft WORD Merge

This document contains instructions on how to create a Microsoft WORD report using the downloaded "Open Legislative Data" or "Tracking List" data files. It is just one example of how the data in a .csv file can be further processed. For more information on using .csv files please refer to your individual application's help.

Steps for creating a report in Microsoft WORD 2007 using the data (.csv) file

Once you have saved your .csv file (either the "Open Legislative Data" file or your individual "Tracking List" file) on your computer and closed the file, follow the steps enumerated below:

Create the WORD template

1. Open a new document in Microsoft WORD.

2. If you choose to, you can add a header to the report. To do this:

    a. Click the **Insert** tab

   b. Click the **Header** button from the **Header & Footer** tools area.

    c. Select a header type

    d. In the header:

        i. Type a document Title

        ii. Click the **Date & Time** button from the **Insert** area. Select a date format and also check "update automatically".


        iii. Enter column headings for the data fields that you will be merging into the document.

    e. Double click in the body of the document to leave the **Header**.

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3. Your document will look similar to the following:
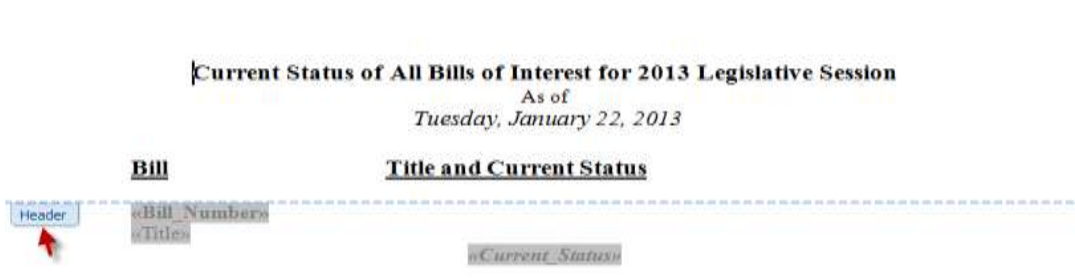
4. Now you are ready to add fields to your template.

   a. Click the **Mailings** tab.

   b. Click **Start Mail Merge** button and select **Directory** from the list.
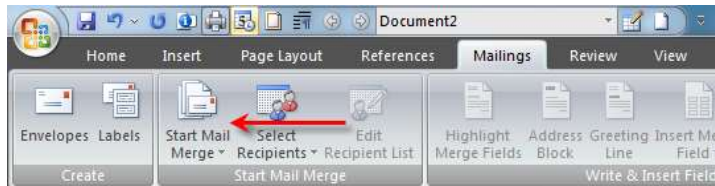
   c. Click **Select Recipients** button and select **Use Existing List** from the list.

      i. Within the opened dialog box, navigate to where you stored the .csv data file

      ii. Double click the file name to select it.

   d. From the **Mailings** tab click **Insert Merge Field** repeatedly, each time selecting a field for the report:

      i. Select "Bill" and press enter to return to next line

      ii. Select "Title" and press enter to return to next line

      iii. Select "Current Status" and press enter to return to next line

      iv. Optionally, you can change the format of the fields by highlighting (selecting) any of them and changing the format to bold, italicized, a different font, etc.

   e. The document fields will look similar to the following:

5. **Save** the document and remember the location for further merge usage. You have now created a template that may be used each time you wish to create a report.

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Merge data (.csv) and template

1. Next you are ready to merge the data into the template

   a. From the **Mailings** tab

      i. Click the **Finish & Merge** button and select **Edit Individual Documents**.

      ii. Select "All" and click OK on the **Merge to New document** message box to complete the merge process.

   b. Your report will be displayed and look similar to the following:

Re-creating future reports using this template and later versions of the CSV

Each time you receive or create a new .csv file, save and close the file giving it the same name, file type, and path as the first one. To perform a new merge in WORD:

1. Open the template. A SQL message box will be displayed warning you that the data from the original .csv file will be placed in the document. Answer **No**.
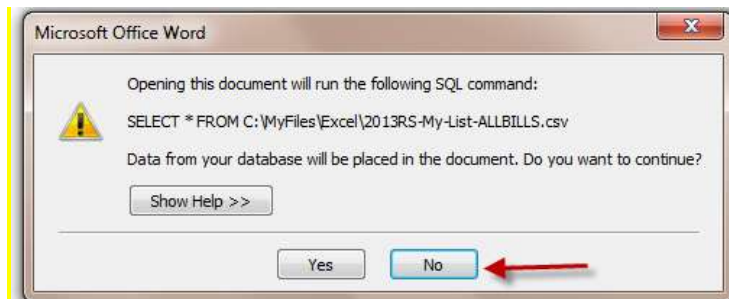
2. From the **Mailings** tab:

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a. Click **Select Recipients** button and select **Use Existing List** from the list. Navigate to where the .csv file is saved to re-associate the updated .csv file to the template.

b. Click the **Finish & Merge** button and select **Edit Individual Documents**.

c. Select "All" and click OK on the **Merge to New document** message box to complete the merge process.