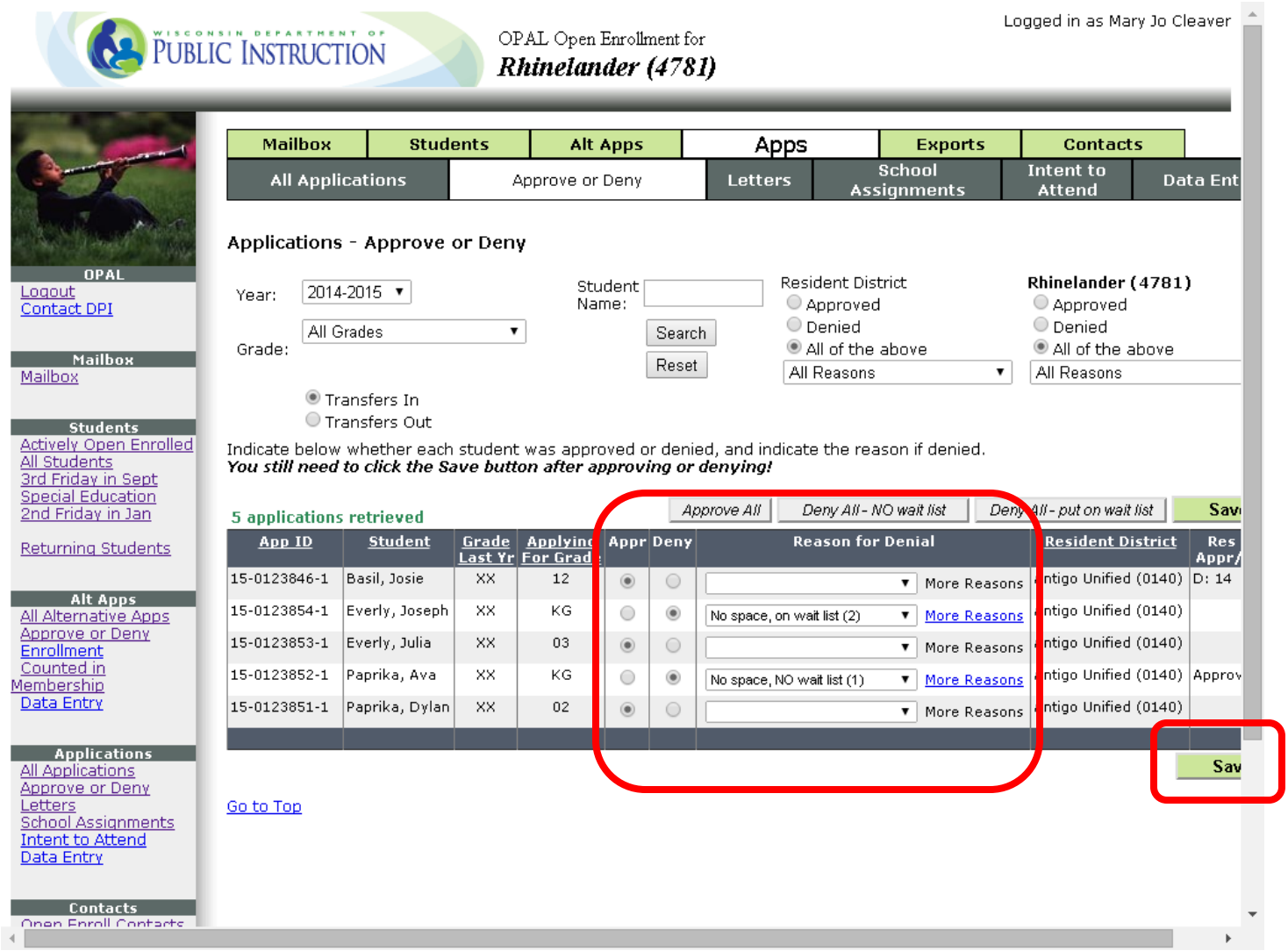
Instructions for Using Microsoft Word Mail Merge and OPAL Exports to Approve and Deny Open Enrollment Applications

Step 1: Export the Data

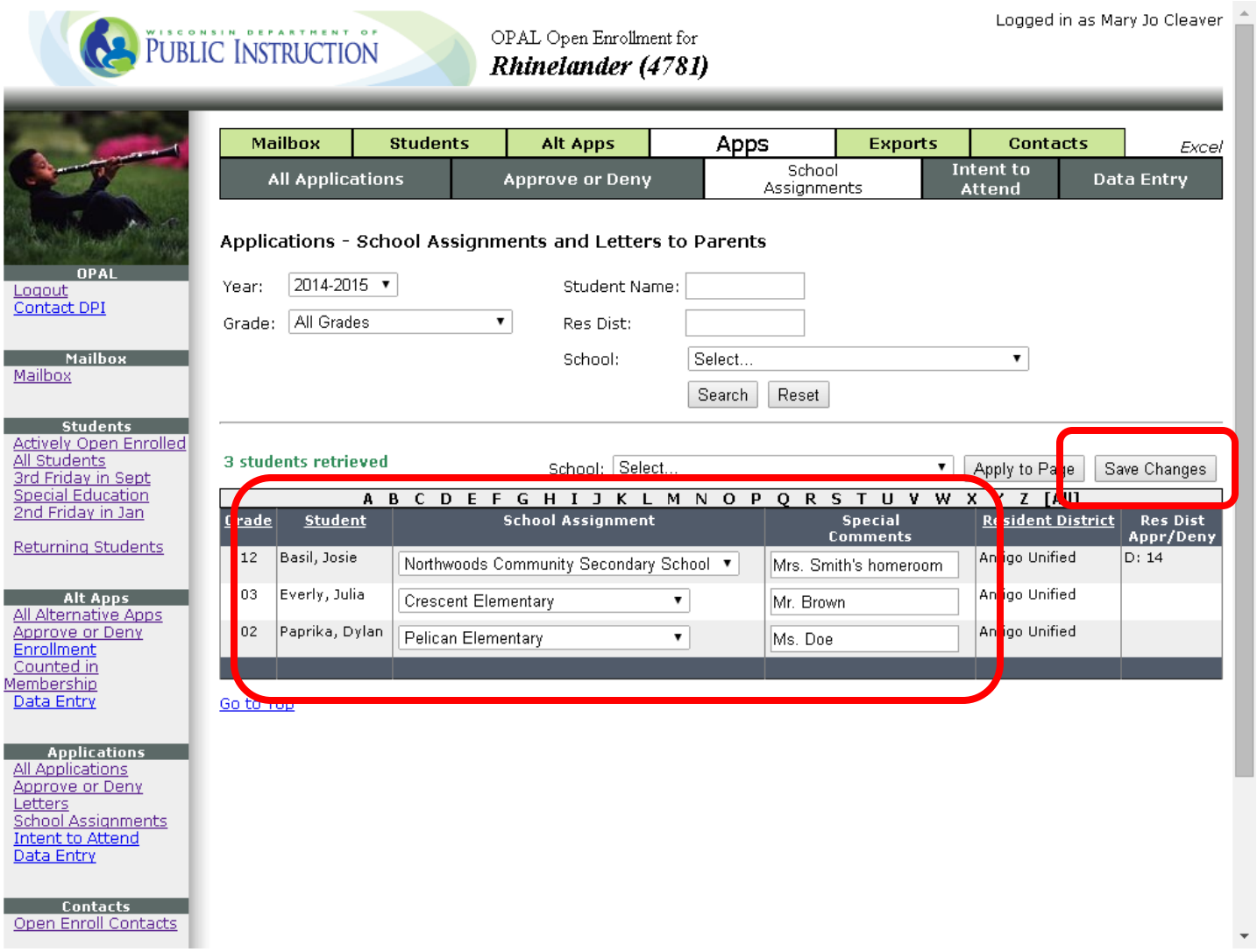
There are three steps for preparing approval and denial letters using a Microsoft Word mail merge with data exported from OPAL.

Step 1: Export the Data
Step 2: Create the Templates
Step 3: Prepare the Letters Using Mail Merge

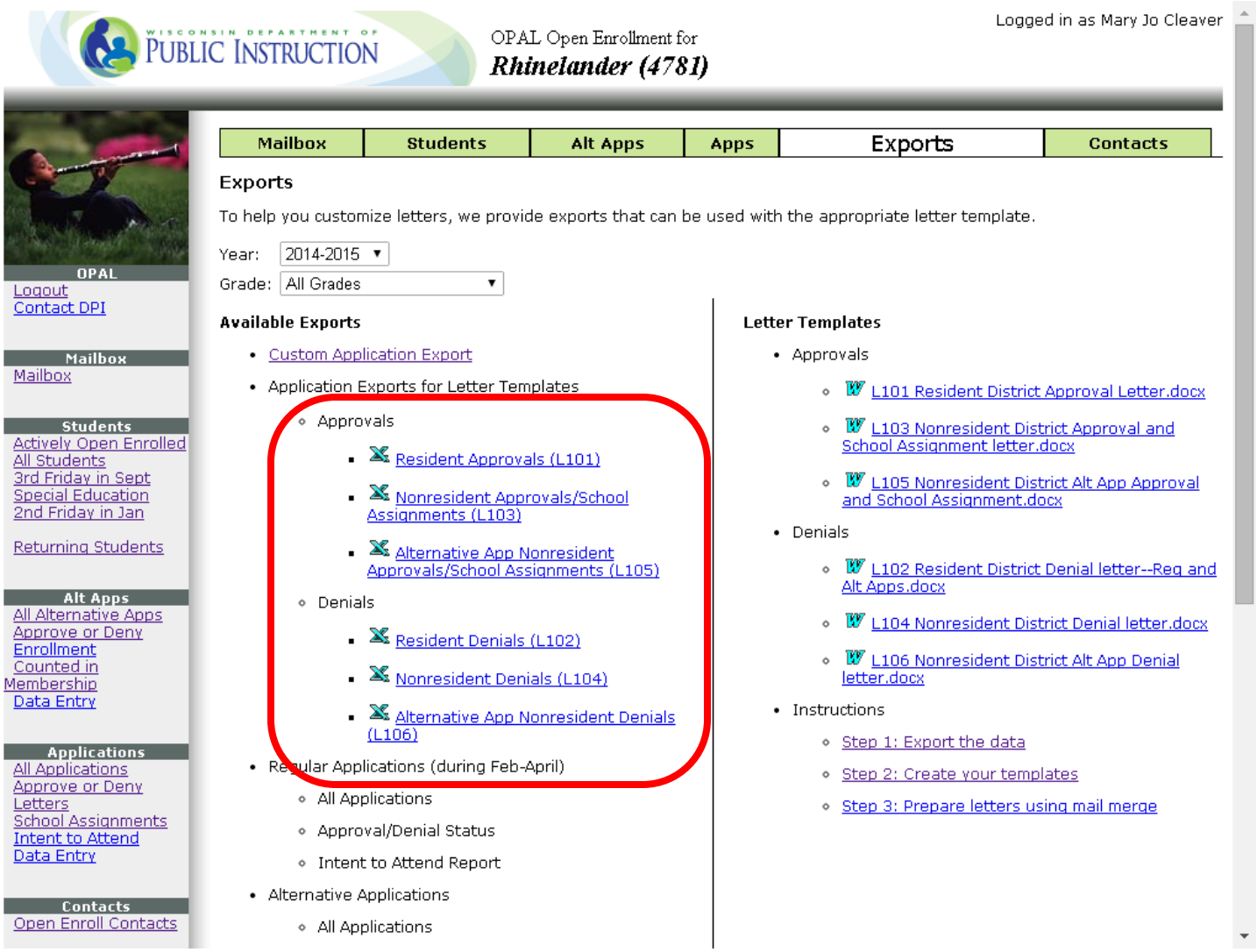
1. Sign into OPAL. Go to the Approve or Deny tab. [Use the tab under Apps for regular applications or under Alt Apps for alternative applications.] Enter approval or denial for each pupil for whom you wish to create a letter. For pupils who are denied, enter the reason for denial. Be sure to SAVE.



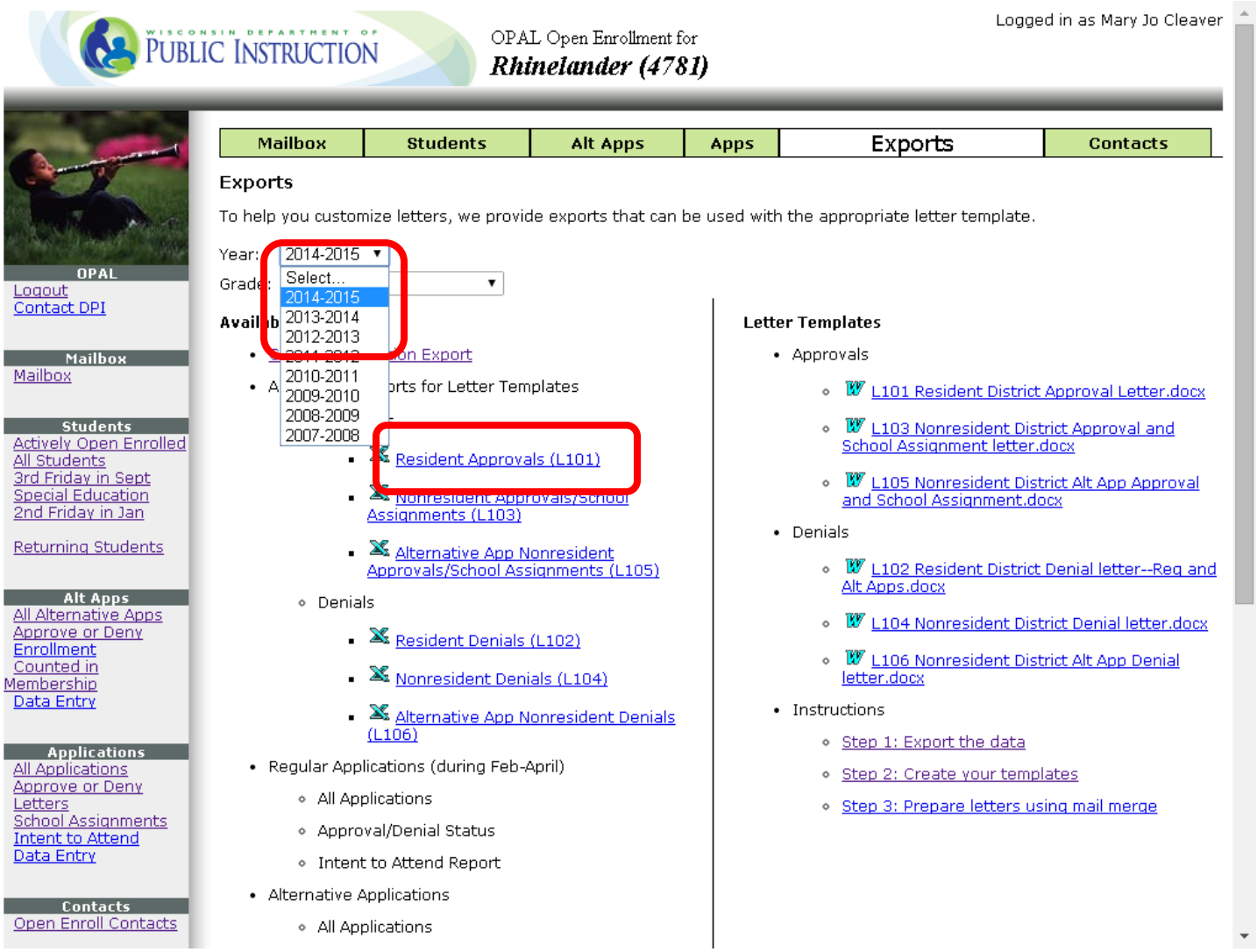
2. For pupils whose applications are approved to transfer IN, go to the School Assignments tab. For each pupil, enter the school assignment and any comments that pertain to that specific pupil (if you wish). Be sure to SAVE.



3. Click on the Exports tab. The data exports are located on the left side of the page.



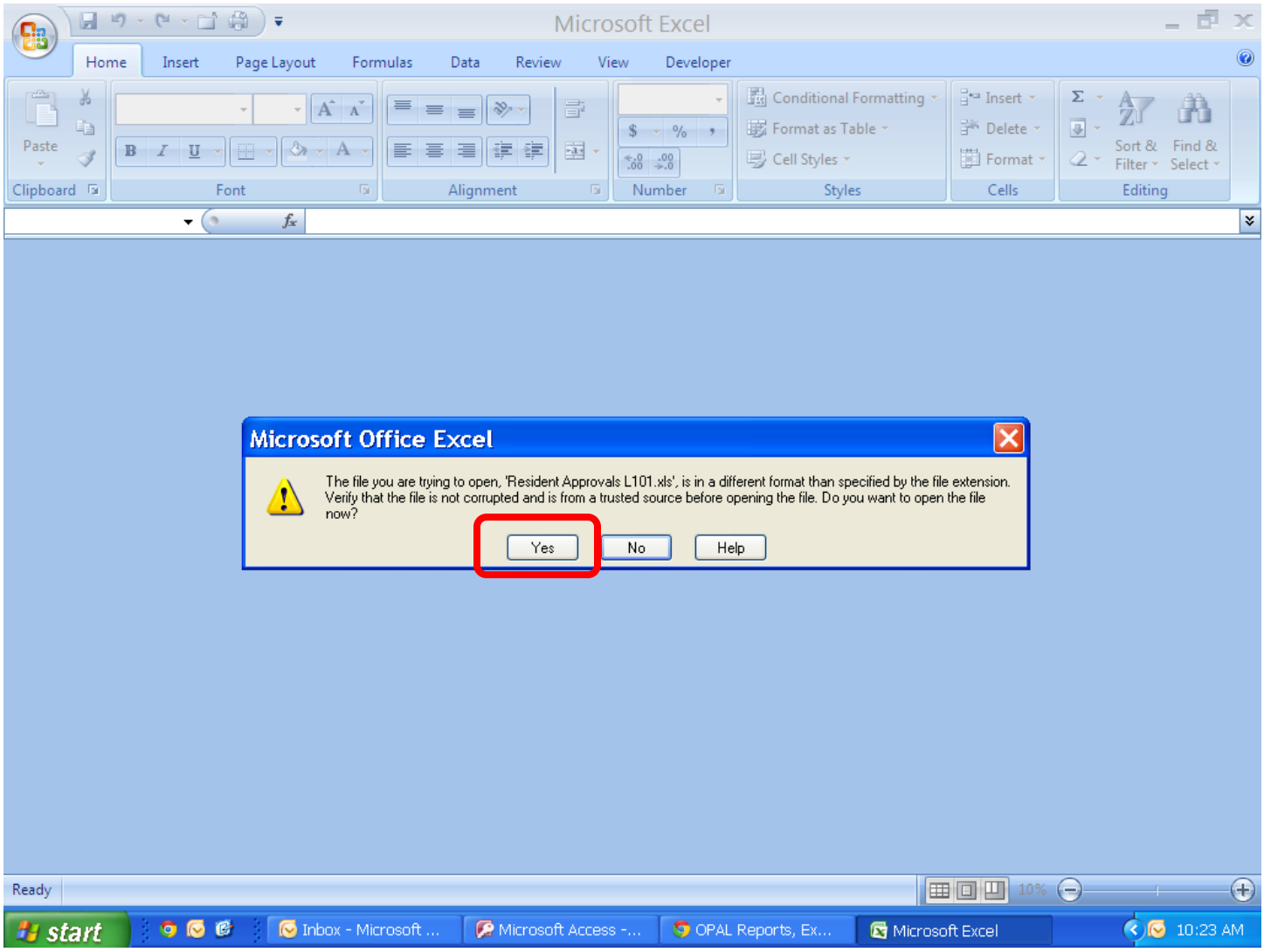
4. Select the data set you wish to export and click on the link.



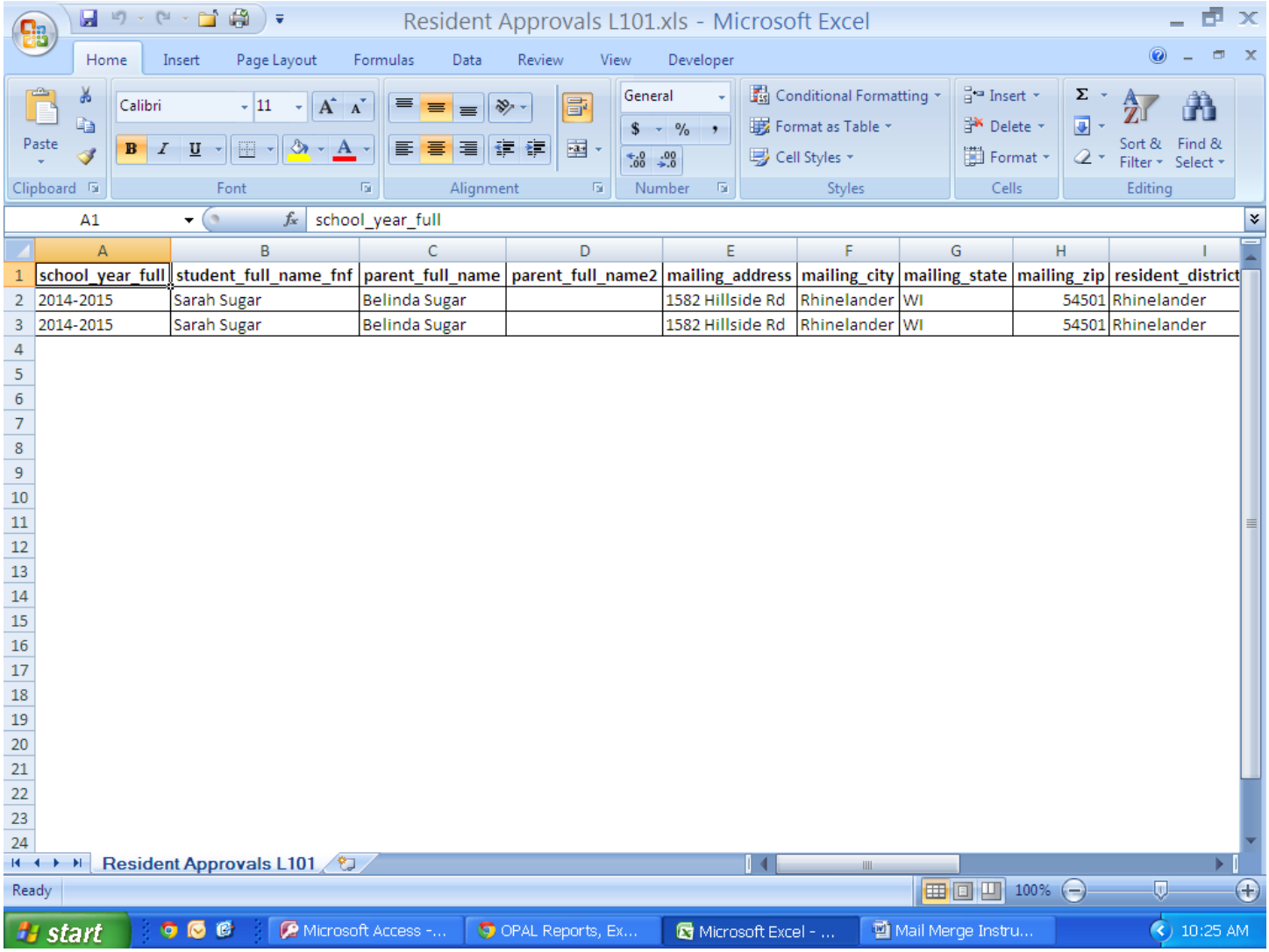
Note the school year. The exports page will default to the school year for which regular applications are submitted (that is, the school year following the one you are in). If you are preparing letters for alternative applications, you must change the school year to the current year before you download the data.

You may also use the other filters to create your downloads. For example, if you want to work with only applications for a single grade, you can change the grade filter and the download will include only applications for that grade.

5. Click “Yes.”

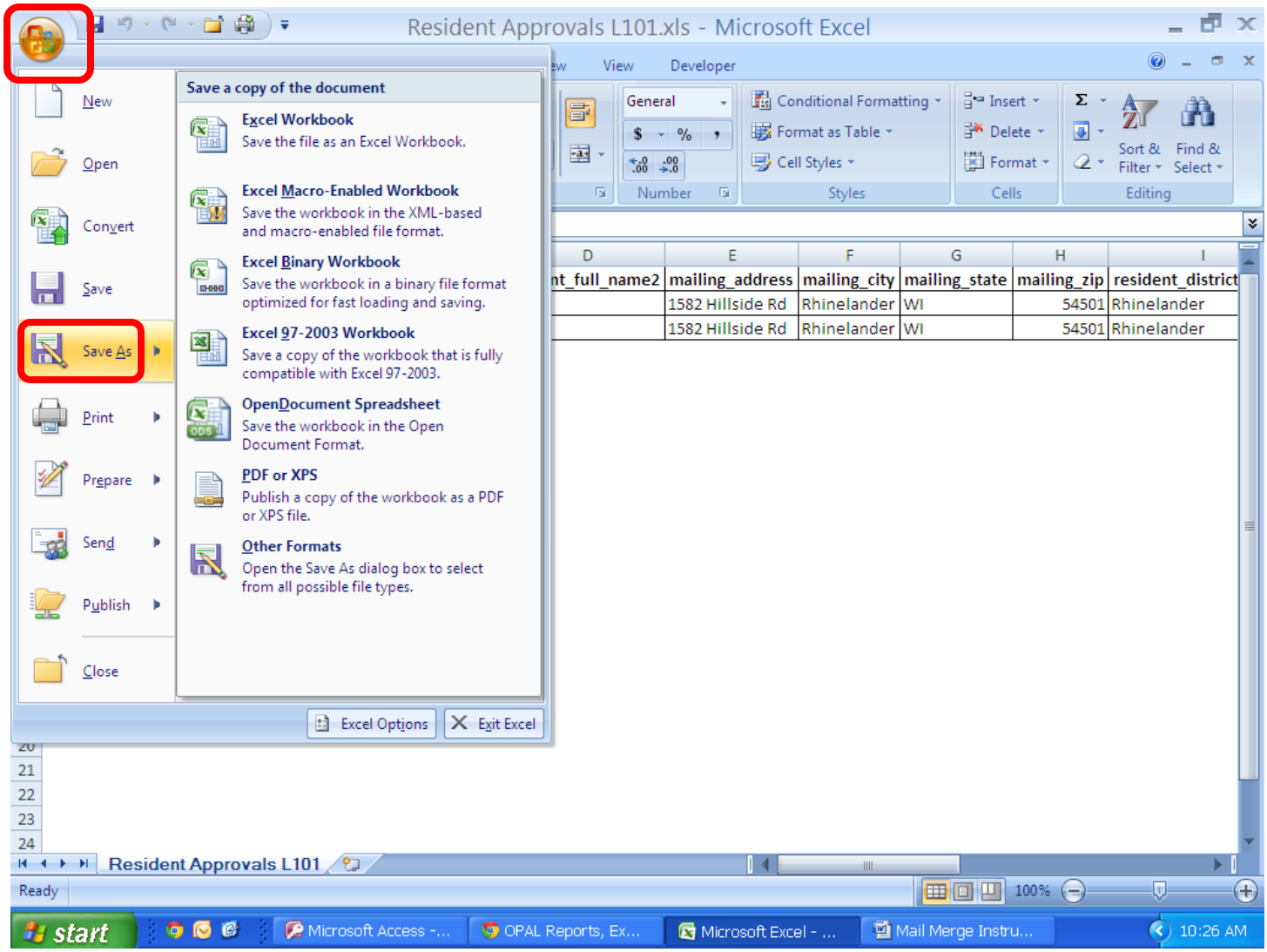

Microsoft Excel
Home
Insert
Page Layout
Formulas
Data
Review
View
Developer
Paste
Clipboard
Font
Alignment
Number
Conditional Formatting
Format as Table
Cell Styles
Styles
Insert
Delete
Format
Cells
Sort & Filter
Find & Select
Editing
Microsoft Office Excel
The file you are trying to open, 'Resident Approvals L101.xls', is in a different format than specified by the file extension. Verify that the file is not corrupted and is from a trusted source before opening the file. Do you want to open the file now?
Yes
No
Help
Ready
start
Inbox - Microsoft ...
Microsoft Access -...
OPAL Reports, Ex...
Microsoft Excel
10:23 AM

5. This will open the spreadsheet.

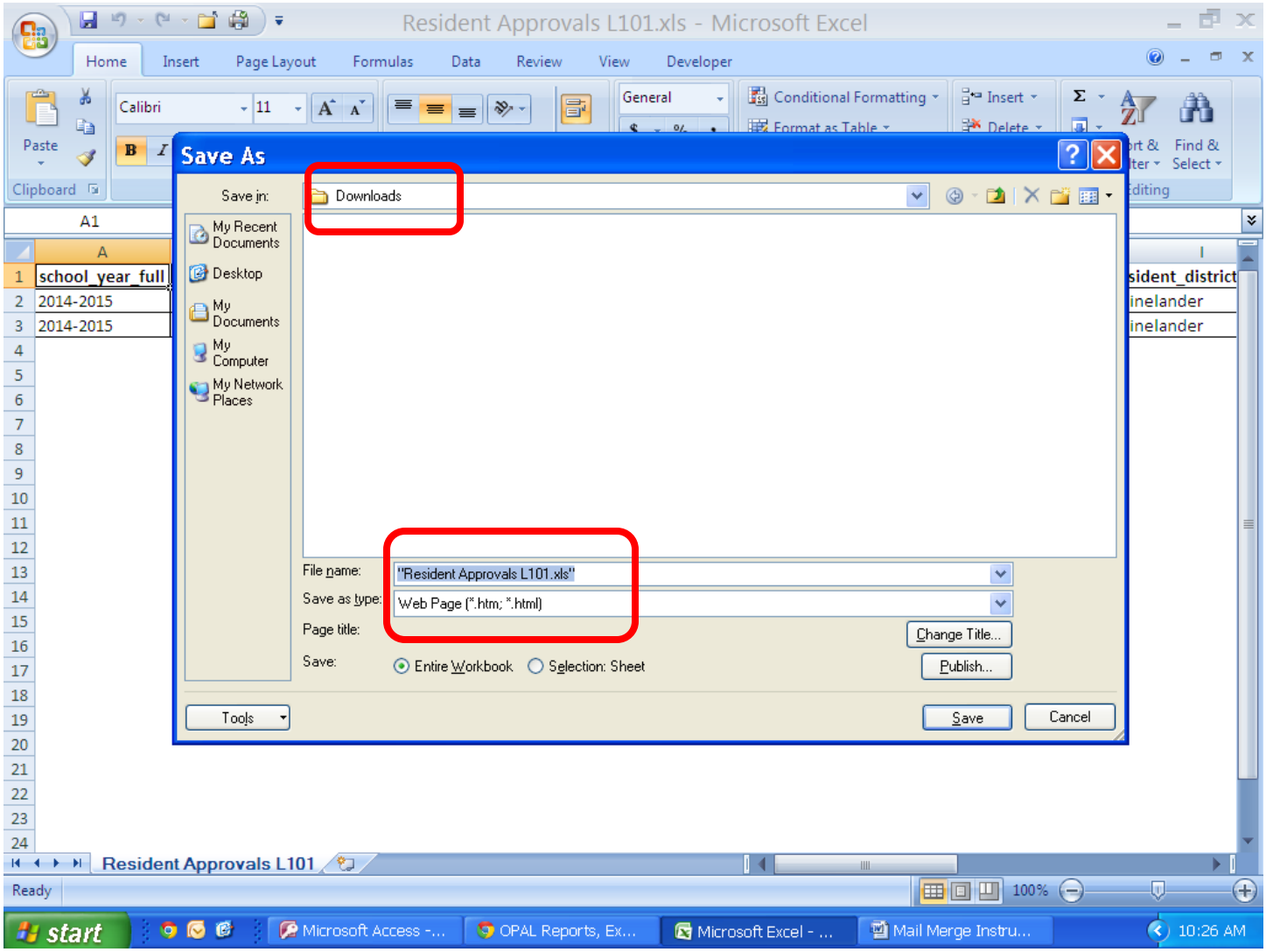


school_year_full	student_full_name_fnf	parent_full_name	parent_full_name2	mailing_address	mailing_city	mailing_state	mailing_zip	resident_district
2014-2015	Sarah Sugar	Belinda Sugar		1582 Hillside Rd	Rhinelander	WI	54501	Rhinelander
2014-2015	Sarah Sugar	Belinda Sugar		1582 Hillside Rd	Rhinelander	WI	54501	Rhinelander

7. Click on the Windows symbol and then click on Save As.

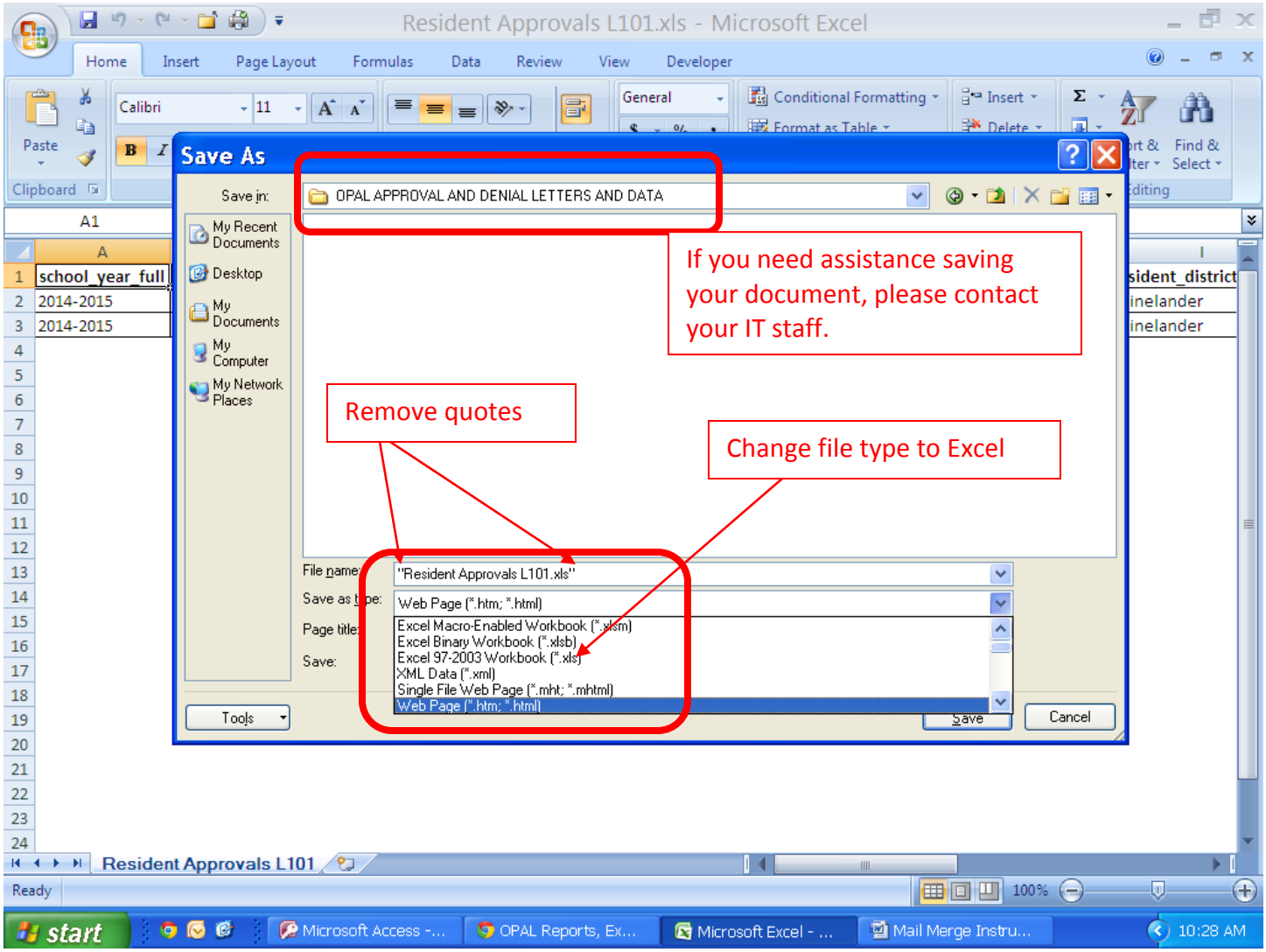


8. The file will originally be stored as a web page in a Downloads folder on your computer.

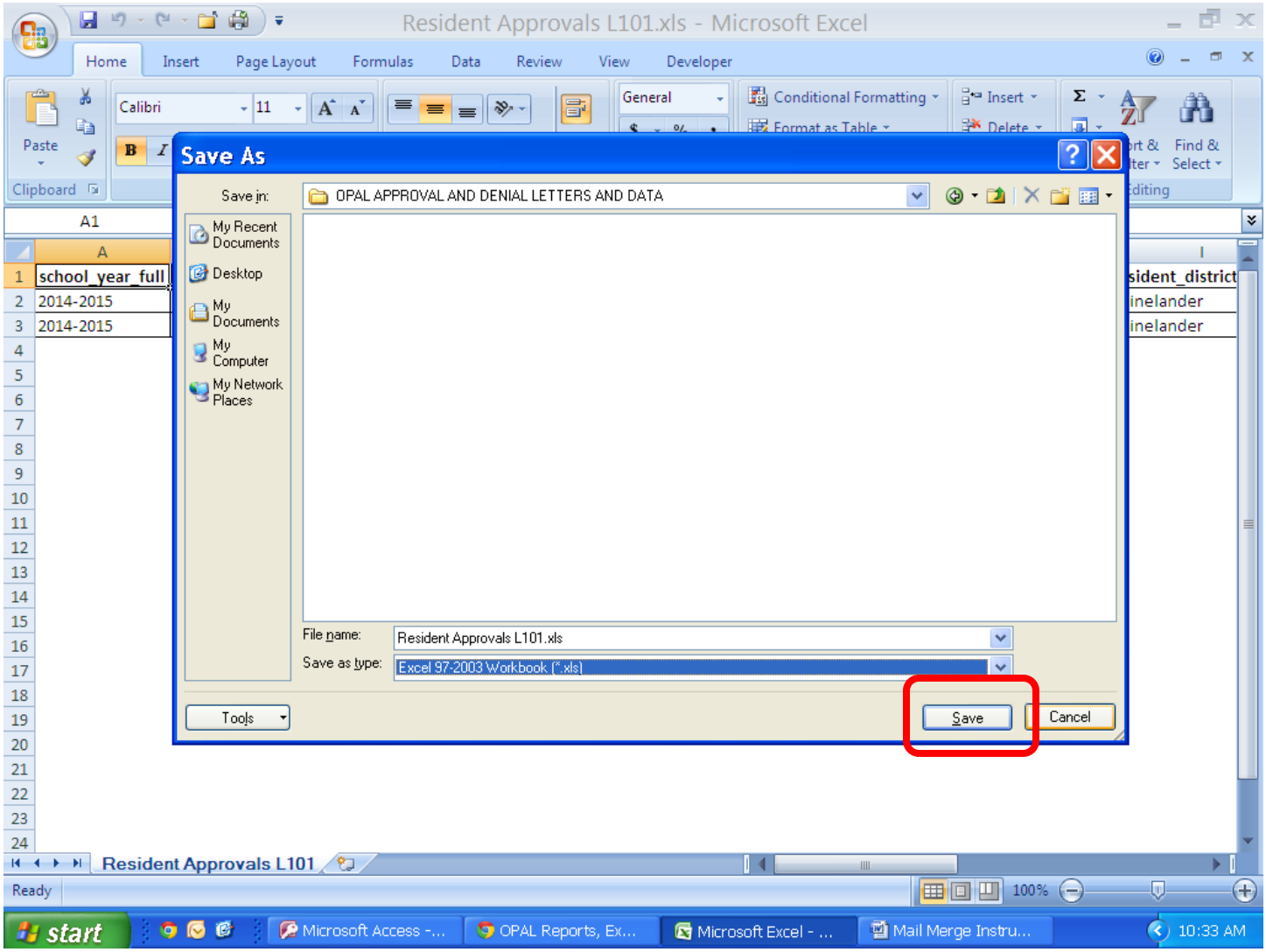


9. Go to the location on your computer where you wish to store the export file. <u>Be sure to write down where you have stored it, you will need to find it when you create your templates</u>.

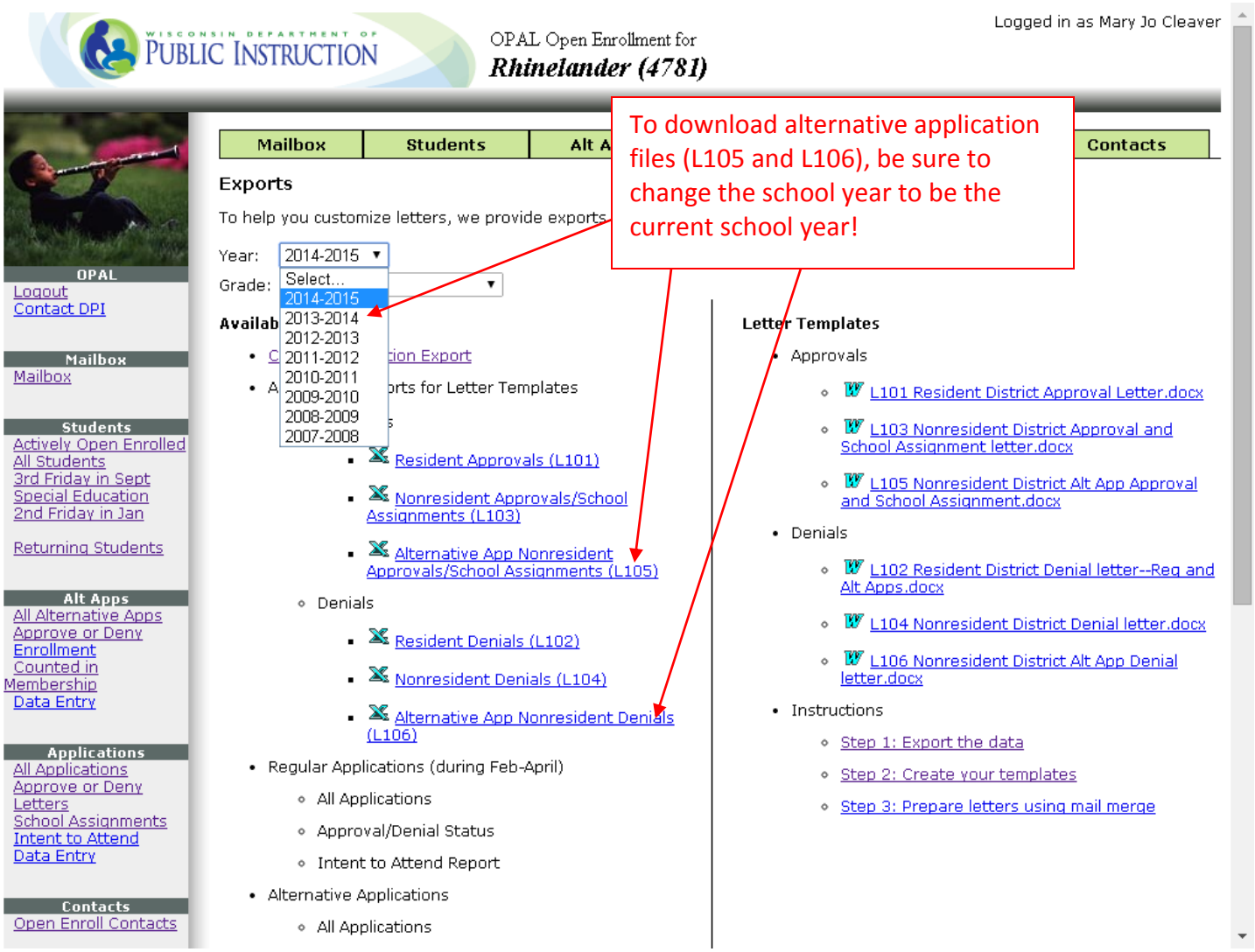
Change the file type from Web Page to Excel. Remove the quote marks from the name of the file. Also remove any numbers and parentheses (which sometimes appear if you have downloaded the same file more than once), unless you want to differentiate between different downloads of the same file.

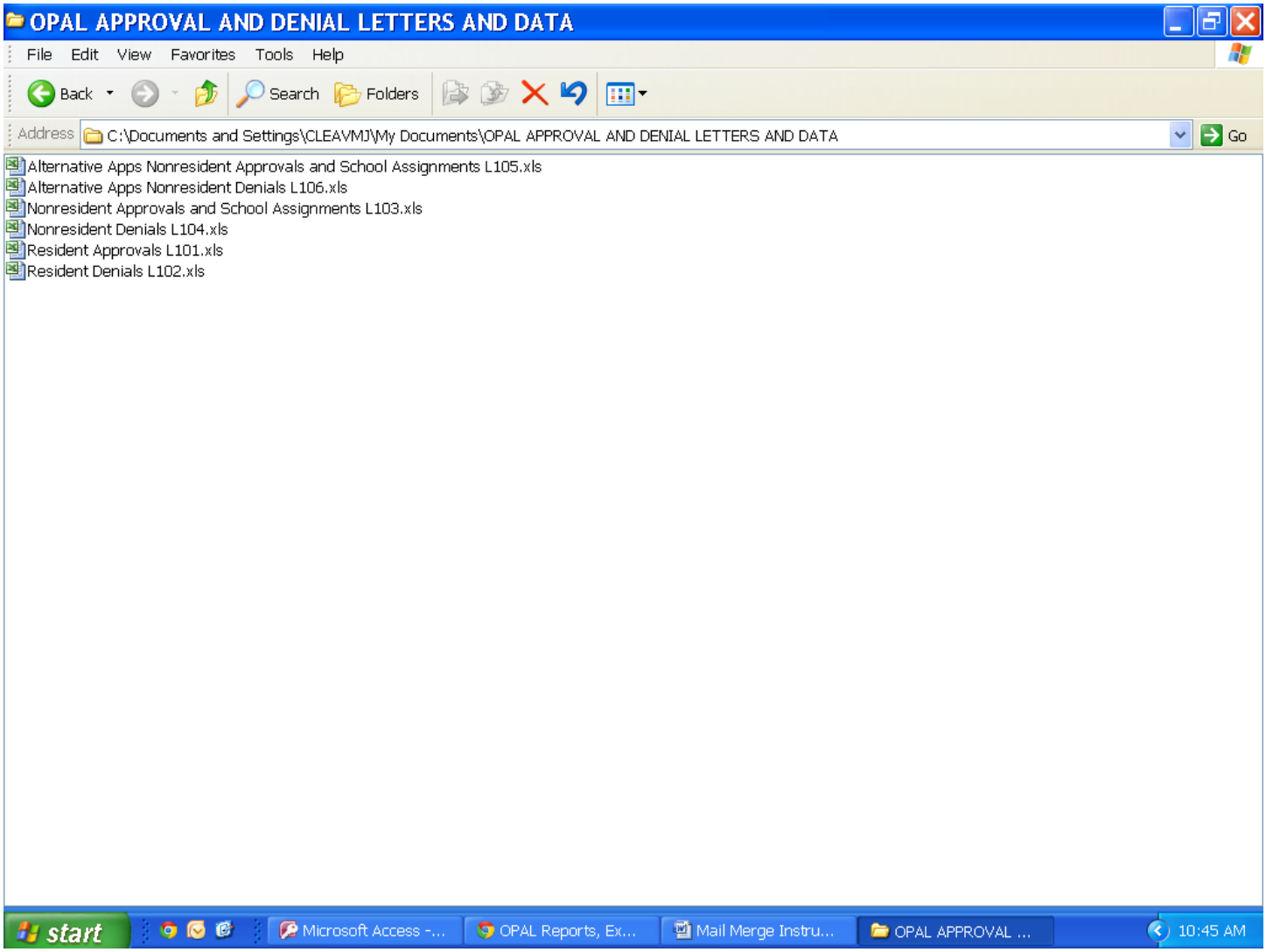


10. Save the file.



11. You have created your first export data file. Repeat with the other data sets, as you wish.





You are now ready to create your Word Templates in Step 2.

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Return to the OPAL Exports page and continue with Step 2 instructions on creating templates.