

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

Step 3: Prepare the Letters Using Mail Merge

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](#)

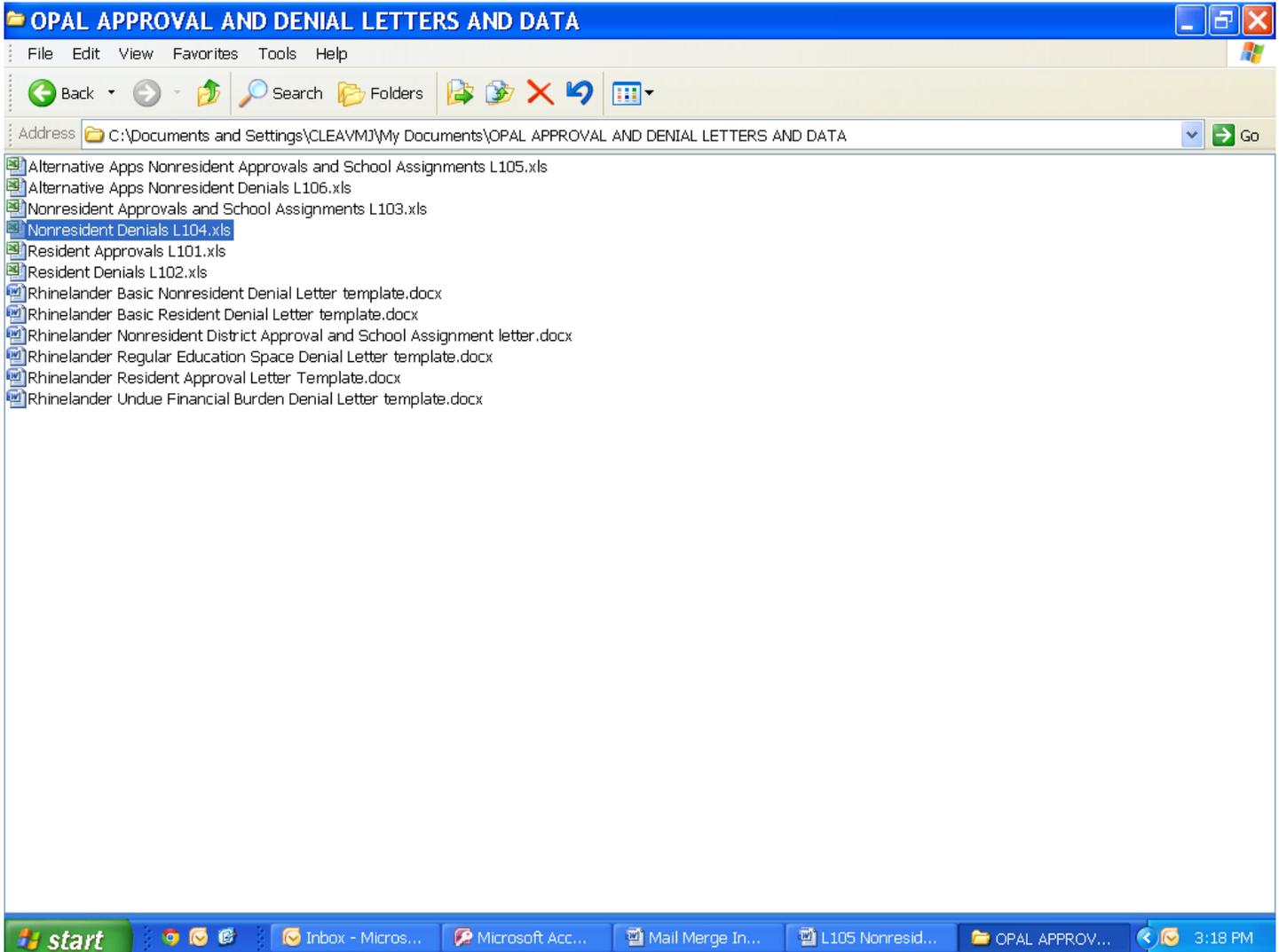
Basic Steps for Creating Approval and Denial Letters with Mail Merge

1. Make any changes you want to make to the export file (such as adding waiting list numbers).
2. Open the letter.
3. Make any changes you want to make for this batch of letters.
4. Select the recipients.
5. Finish the mail merge.
6. Make any changes you want to make to the finished letter (such as adding the waiting list number).

The Export File

Make any changes you wish to the export file. If you wish to add a waiting list number that will be merged into the letters, you should do it now.

1. Find the location where you have stored your export file. To add a waiting list number for an application submitted during the regular application period, you should use Nonresident Denials L104.xls. You must exit Word in order to open an Excel file.



2. Open the export file. Note that there is a blank field titled “reg_waiting_list_number.”

The screenshot shows a Microsoft Excel spreadsheet titled "Nonresident Denials L104.xls [Compatibility Mode]". The spreadsheet has the following columns: school_year_full, student_full_name_fnf, grade, nonres_denial_reason_ex, reg_waiting_list_number, sped_waiting_list_number, parent_full_name, and parent_contact_info. The data rows are as follows:

1	school_year_full	student_full_name_fnf	grade	nonres_denial_reason_ex	reg_waiting_list_number	sped_waiting_list_number	parent_full_name	parent_contact_info
2	2014-2015	Joseph Everly	KG	No space, on wait list,			Bobbie Jo Everly	
3	2014-2015	Ava Paprika	KG	No space, NO wait list,			Emily Paprika	Robert

A red box highlights the 'reg_waiting_list_number' column in rows 2 and 3, indicating that these fields are blank.

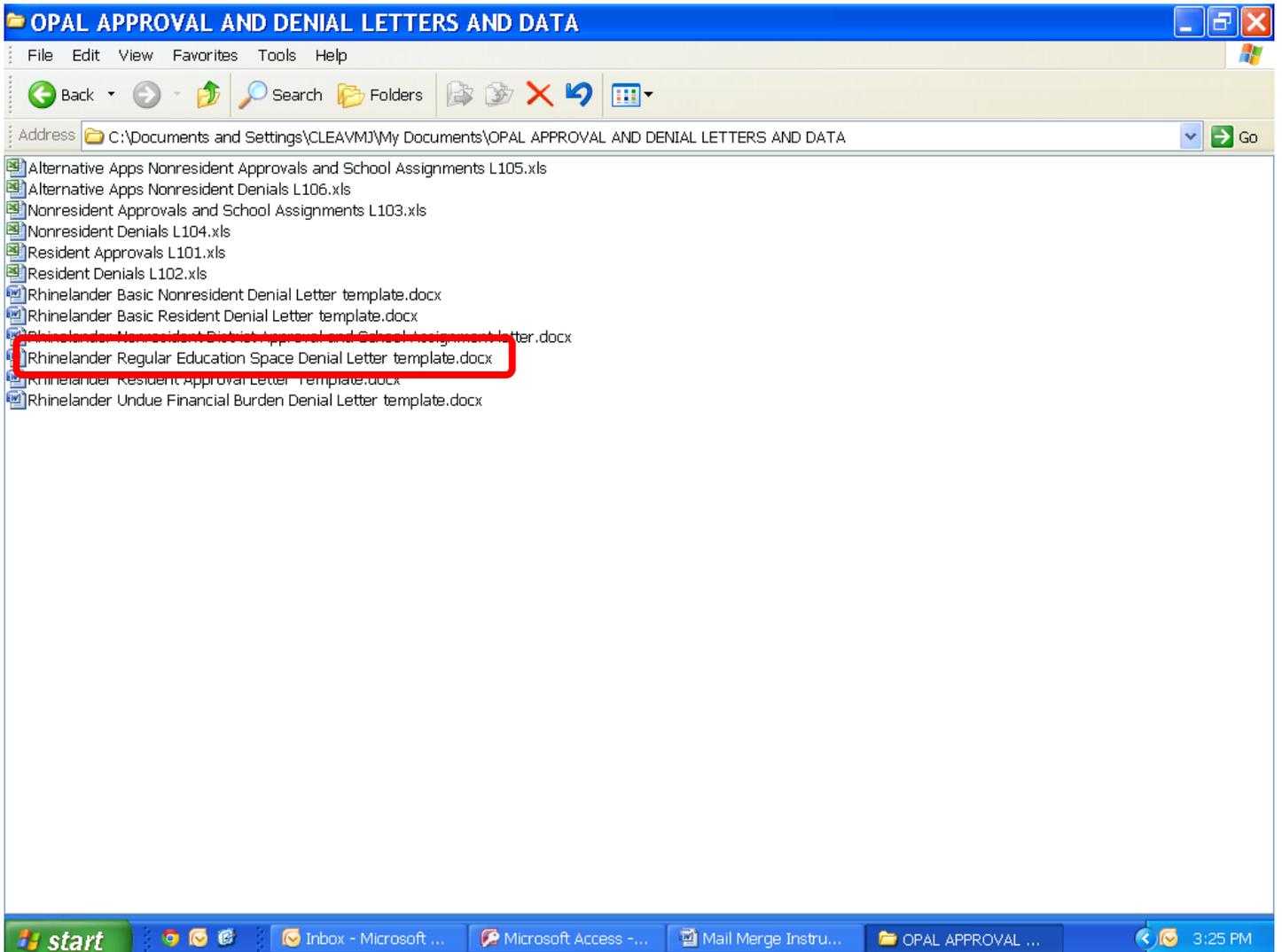
3. Enter pupils' waiting list numbers and re-Save the file.

The screenshot shows the Microsoft Excel interface with the following data in the spreadsheet:

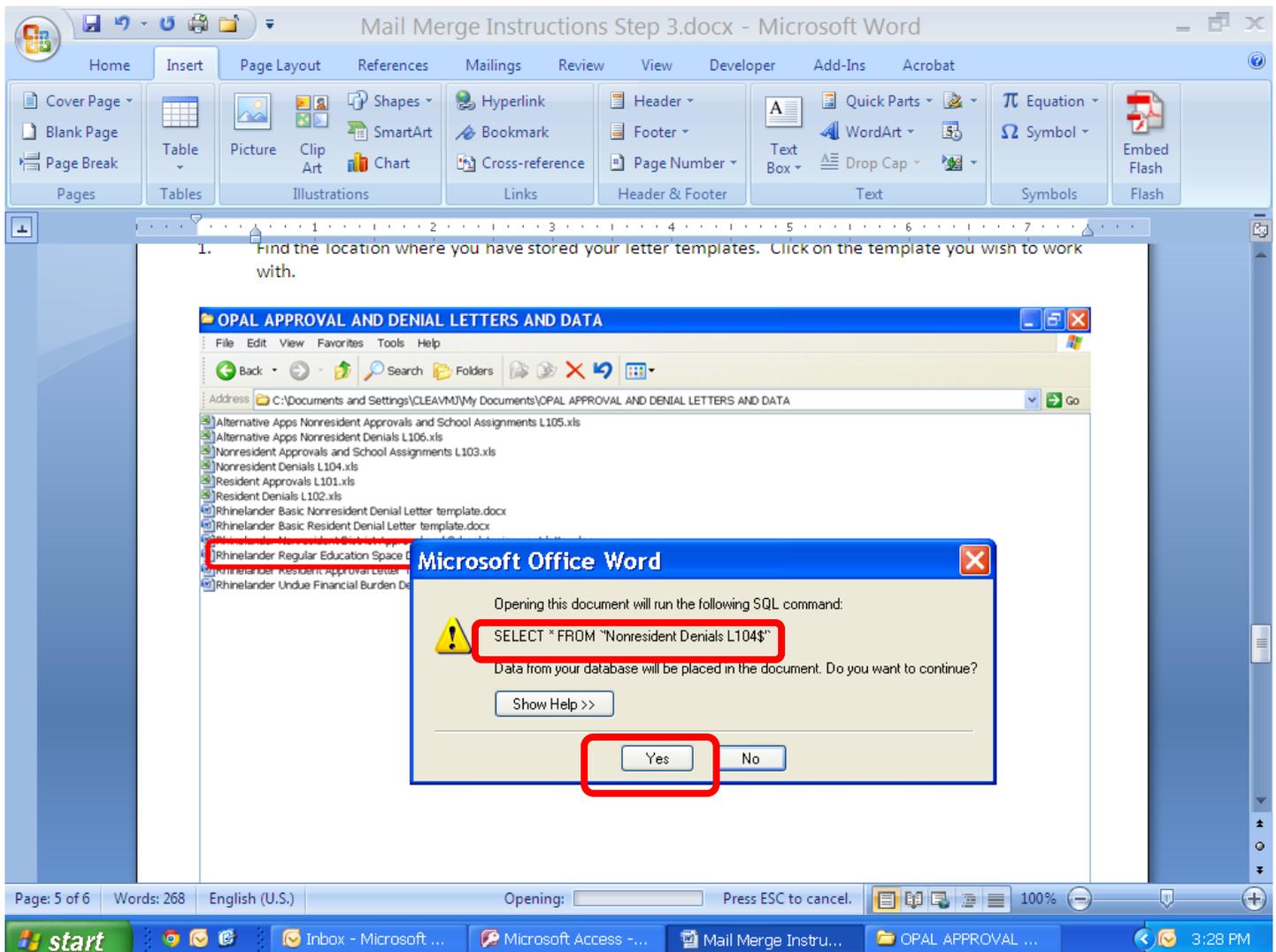
	A	B	C	D	E	F	G	H
1	school_year_full	student_full_name_fnf	grade	nonres_denial_reasons	reg_waiting_list_number	sped_waiting_list_number	parent_full_name	parent_email
2	2014-2015	Joseph Everly	KG	No space, on wait list,	5		Bobbie Jo Everly	
3	2014-2015	Ava Paprika	KG	No space, NO wait list,			Emily Paprika	Robert
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Preparing the Approval and Denial Letters

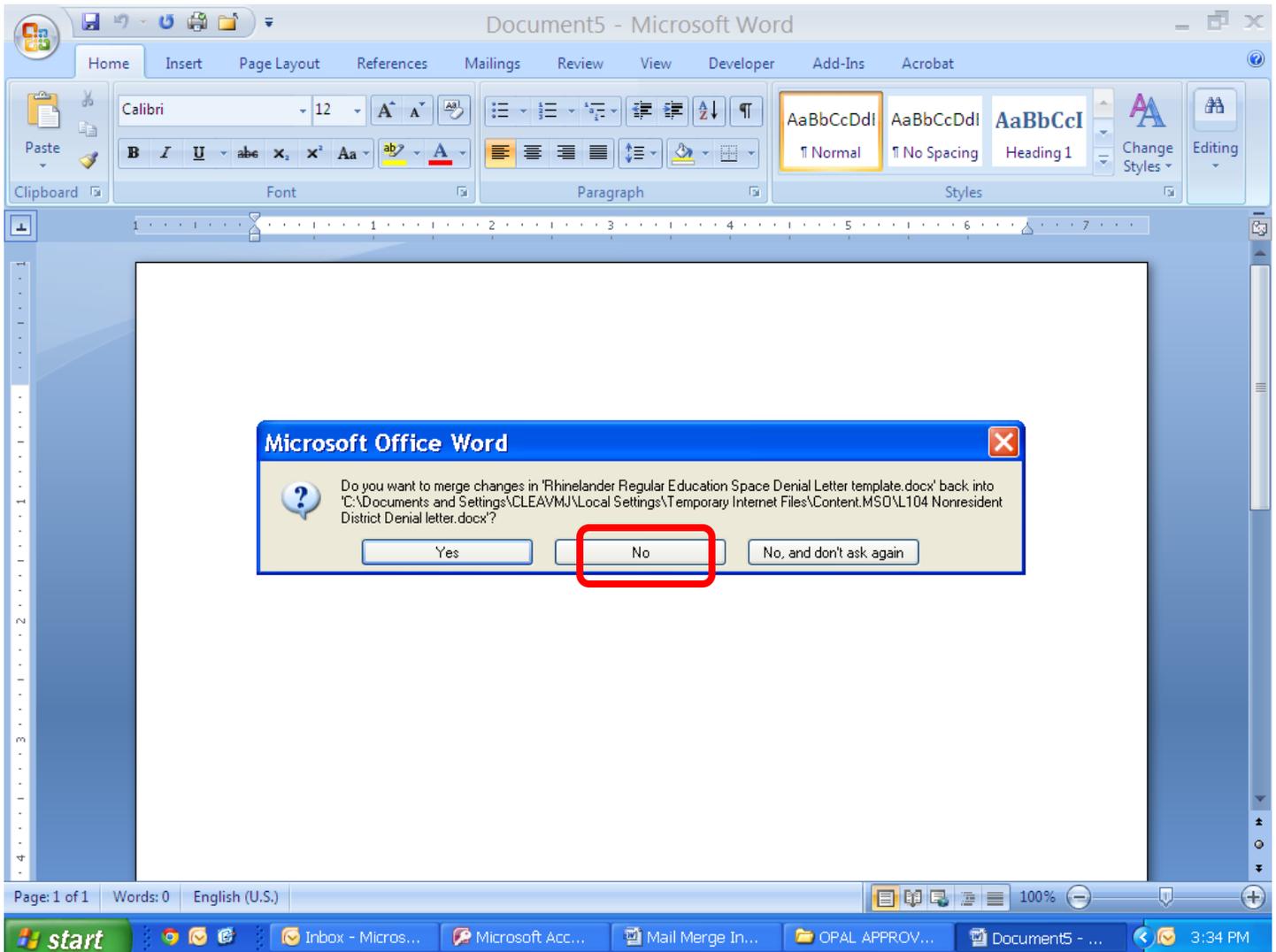
1. Find the location where you have stored your letter templates. Click on the template you wish to work with.



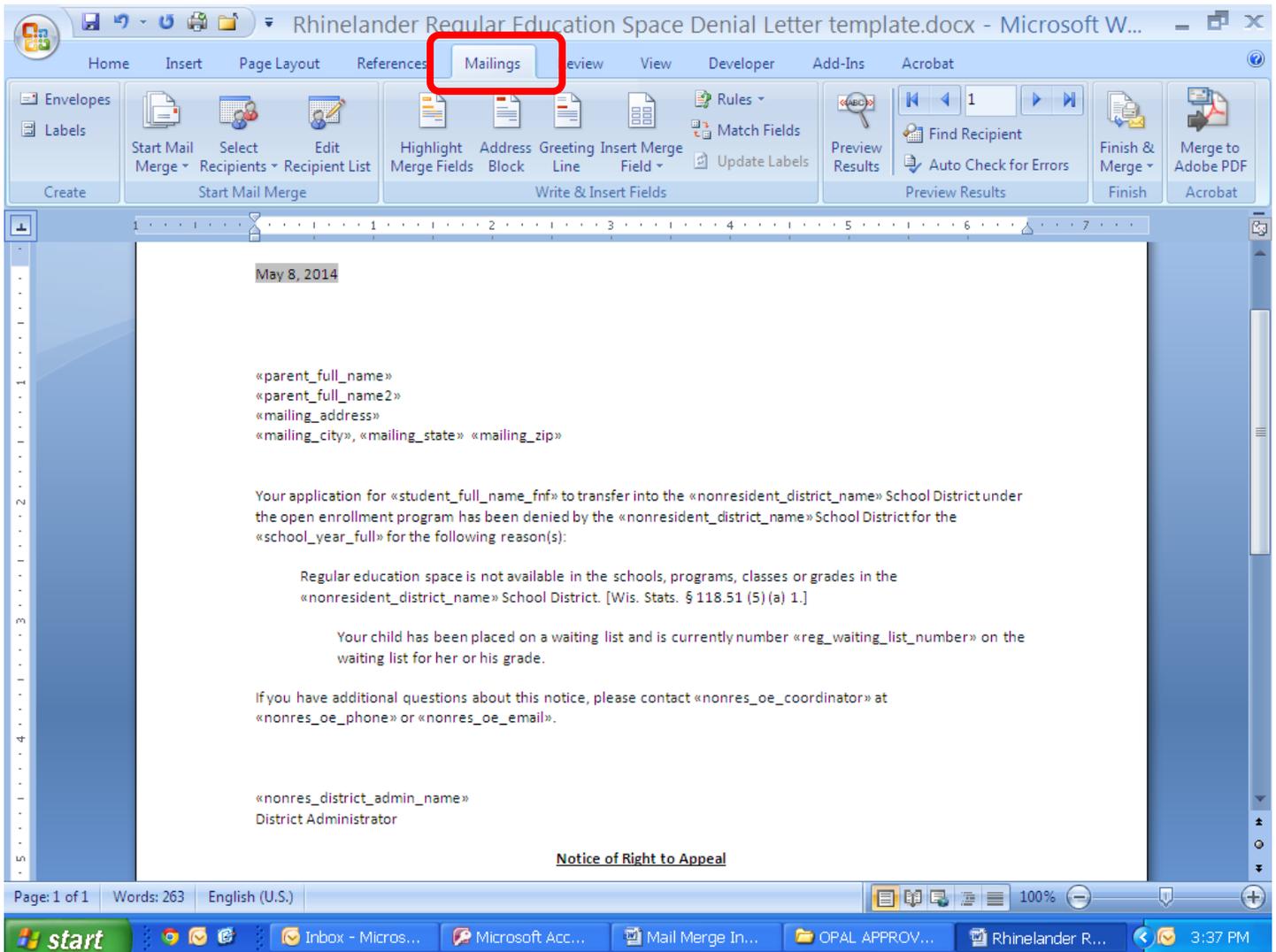
2. A dialog box will tell you that data will be placed in the letter and asking if you wish to continue. Ensure that the data file is the correct export file and click "Yes."



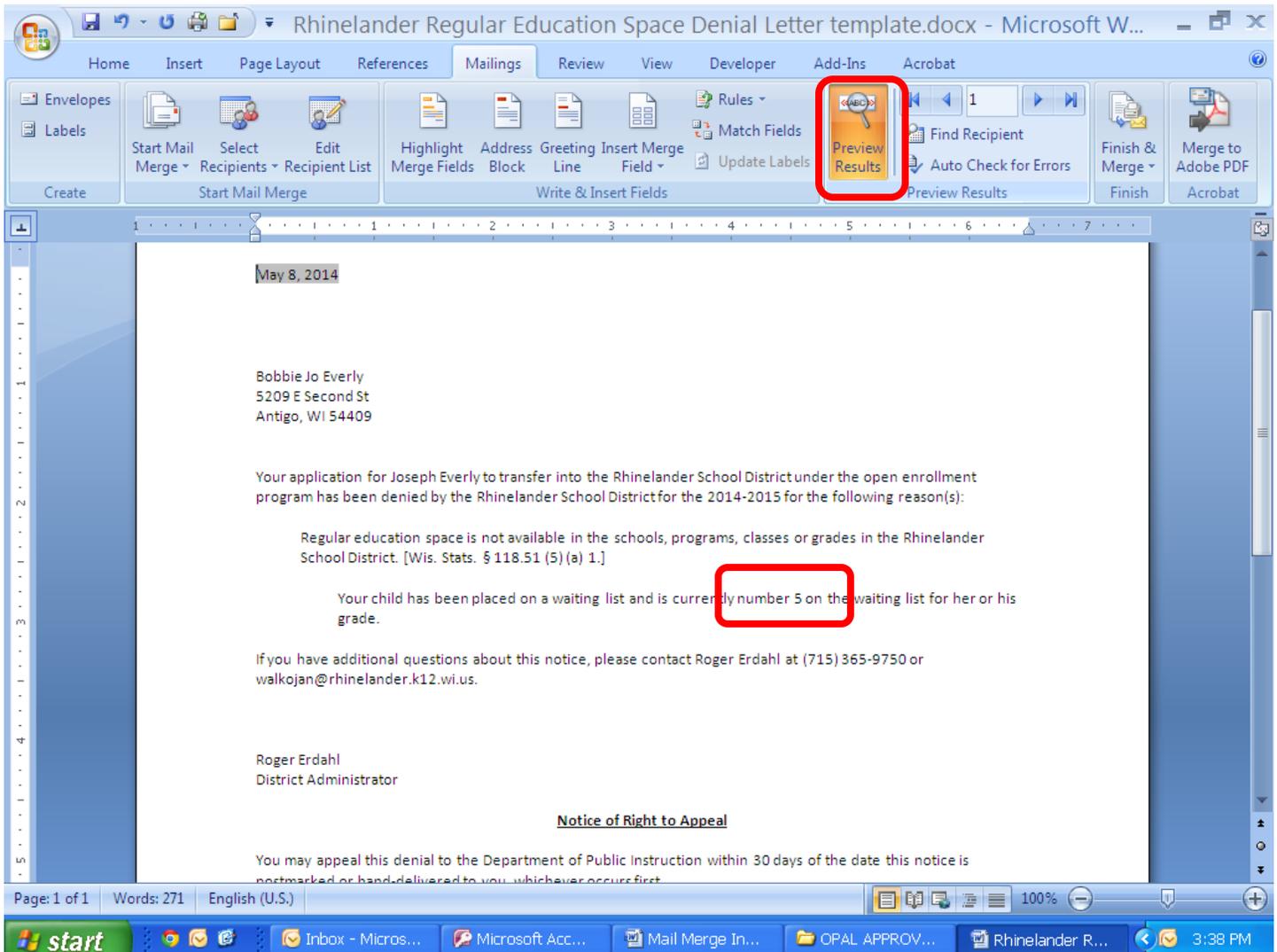
3. You may get a dialog box asking if you wish to merge the letter into another document. If you do, click "No."



4. Open the template and click on Mailings.

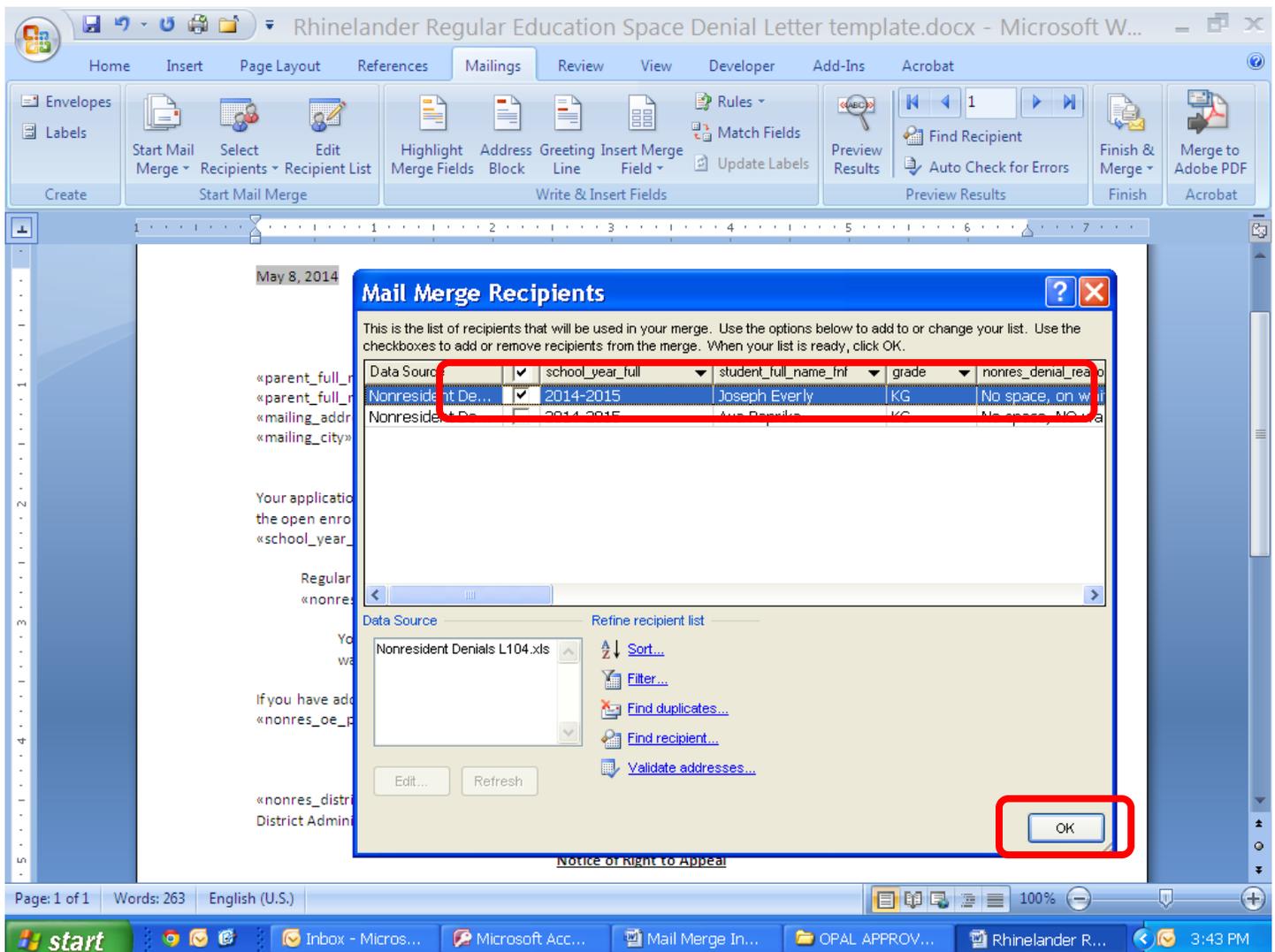


5. Click on Preview Results to be sure the finished letter looks correct. Note that the waiting list number has been inserted.

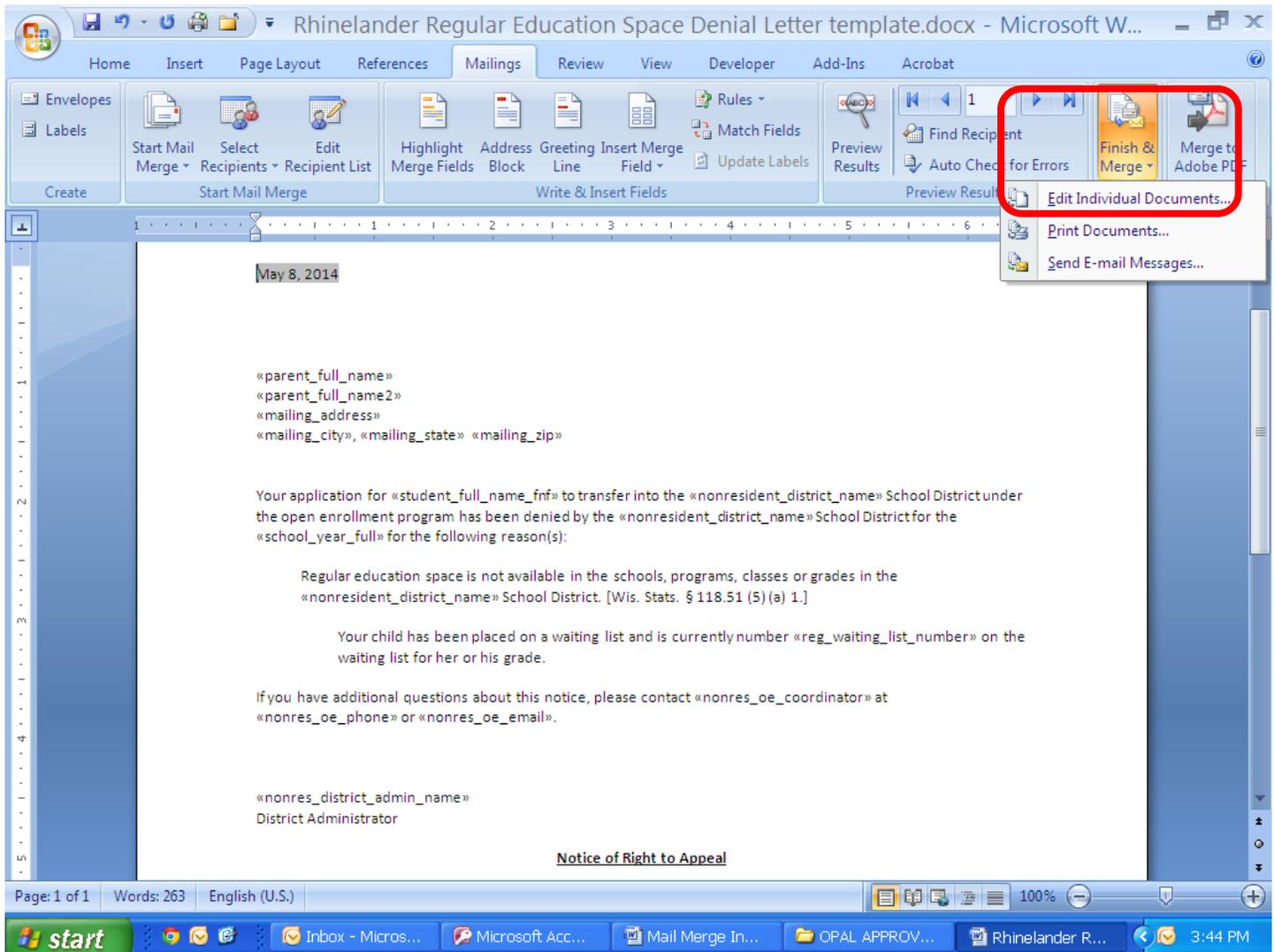


Unclick Preview Results.

6. Click on Edit Recipient List. You will see a list of all of the pupils who are in the export file. Check and/or uncheck names so that the names of pupils you are preparing letters for are checked. Click “OK.”



7. Click on Finish & Merge and Edit Individual Documents.

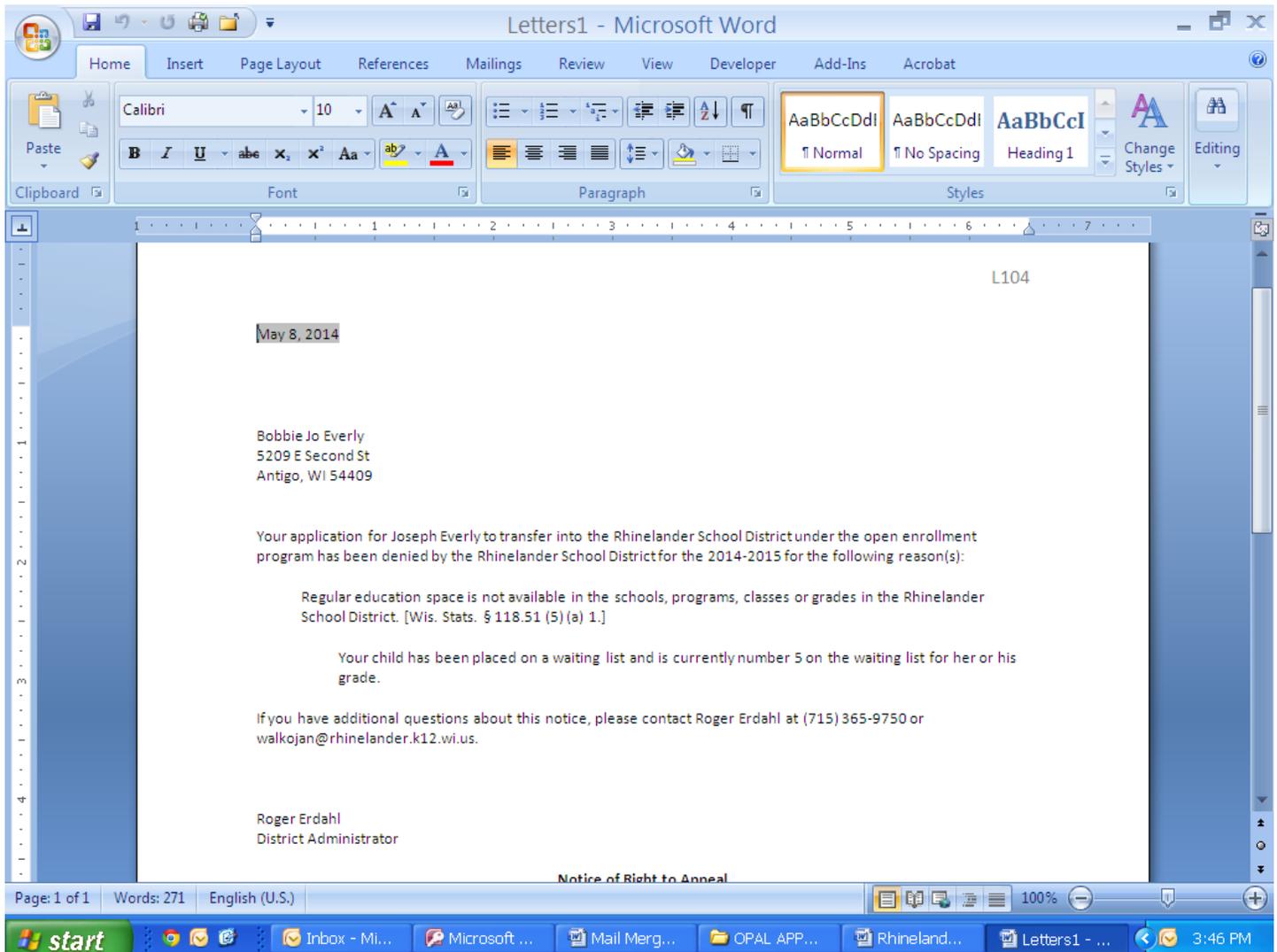


8. Click "OK."

The screenshot shows the Microsoft Word interface with the 'Mailings' tab selected. A 'Merge to New Document' dialog box is open, centered on the screen. The dialog box has a title bar with a question mark and a close button. Inside, under 'Merge records', there are three radio button options: 'All' (which is selected), 'Current record', and 'From: [] To: []'. The 'OK' and 'Cancel' buttons at the bottom of the dialog box are highlighted with a red rectangle. The background document is a letter template titled 'Rhineland Regular Education Space Denial Letter template.docx'. The letter content includes a date 'May 8, 2014', several merge fields (e.g., «parent_full_name», «mailing_address»), and a 'Notice of Right to Appeal' section. The Windows taskbar at the bottom shows the Start button, several open applications, and the system clock at 3:45 PM.

9. Your letter and data have been merged to create final letters. If you want to make any individual changes to any pupils' letters (for example, if you want to add waiting list numbers manually at this point or add a reason for denial), you may do so.

At this point, you may save and/or print the letters.



10. The templates in OPAL have not been spaced for window envelopes. If you wish to space the letters for window envelopes, you may do so in Step 2.

If you wish to create an export file with parents' names and addresses for use with a label merge, go to the Exports page in OPAL and click on Custom Application Export.

WISCONSIN DEPARTMENT OF PUBLIC INSTRUCTION

OPAL Open Enrollment for *Rhinelander (4781)*

Logged in as Mary Jo Cleaver

Mailbox Students Alt Apps Apps Exports Contacts

Exports

To help you customize letters, we provide exports that can be used with the appropriate letter template.

Year: 2014-2015 ▾
Grade: All Grades ▾

Available Exports

- **Custom Application Export**
- Application Exports for Letter Templates
 - Approvals
 - [Resident Approvals \(L101\)](#)
 - [Nonresident Approvals/School Assignments \(L103\)](#)
 - [Alternative App Nonresident Approvals/School Assignments \(L105\)](#)
 - Denials
 - [Resident Denials \(L102\)](#)
 - [Nonresident Denials \(L104\)](#)
 - [Alternative App Nonresident Denials \(L106\)](#)
- Regular Applications (during Feb-April)
 - All Applications
 - Approval/Denial Status
 - Intent to Attend Report
- Alternative Applications
 - All Applications

Letter Templates

- Approvals
 - [L101 Resident District Approval Letter.docx](#)
 - [L103 Nonresident District Approval and School Assignment letter.docx](#)
 - [L105 Nonresident District Alt App Approval and School Assignment.docx](#)
- Denials
 - [L102 Resident District Denial letter--Req and Alt Apps.docx](#)
 - [L104 Nonresident District Denial letter.docx](#)
 - [L106 Nonresident District Alt App Denial letter.docx](#)
- Instructions
 - [Step 1: Export the data](#)
 - [Step 2: Create your templates](#)
 - [Step 3: Prepare letters using mail merge](#)

11. Select the parents' name and address fields and click on Export to Excel. Save the export file where you have saved the other export files. You may use the Mail Merge Wizard in Word to create labels.



Application Data - Select Fields to Export

<input type="checkbox"/> Application <input type="checkbox"/> Application ID <input type="checkbox"/> School Year <input type="checkbox"/> Grade <input type="checkbox"/> Grade Description <input type="checkbox"/> Grade Last Year <input type="checkbox"/> Grade Last Year Description <input type="checkbox"/> Update Date <input type="checkbox"/> Update ID	<input type="checkbox"/> Student Data <input type="checkbox"/> Full Name (last, first) <input type="checkbox"/> Date of Birth <input type="checkbox"/> Last Name <input type="checkbox"/> First Name <input type="checkbox"/> Middle Initial <input type="checkbox"/> Suffix <input type="checkbox"/> Gender	<input type="checkbox"/> Resident District <input checked="" type="checkbox"/> District Name <input type="checkbox"/> District Number	<input type="checkbox"/> NonResident District <input checked="" type="checkbox"/> District Name <input type="checkbox"/> District Number <input type="checkbox"/> Currently Attending
<input checked="" type="checkbox"/> Current Attendance	<input type="checkbox"/> Siblings	<input type="checkbox"/> Special Education / Expulsion	<input type="checkbox"/> Virtual School Information
<input type="checkbox"/> Resident Approve/Deny	<input type="checkbox"/> NonResident Approve/Deny	<input type="checkbox"/> Preferences	<input type="checkbox"/> School Assignments
<input checked="" type="checkbox"/> Parent Info <input checked="" type="checkbox"/> Parent First Name <input checked="" type="checkbox"/> Parent Middle Initial <input checked="" type="checkbox"/> Parent Last Name <input checked="" type="checkbox"/> 2nd Parent First Name <input checked="" type="checkbox"/> 2nd Parent Middle Initial <input checked="" type="checkbox"/> 2nd Parent Last Name	<input checked="" type="checkbox"/> Mailing Address <input checked="" type="checkbox"/> Address <input checked="" type="checkbox"/> City <input checked="" type="checkbox"/> State <input checked="" type="checkbox"/> Zip	<input type="checkbox"/> Street Address	<input type="checkbox"/> Phone and Email Address
<input type="checkbox"/> Race/Ethnicity	<input type="checkbox"/> Submission Information	<input type="checkbox"/> Transportation	<input type="checkbox"/> For DPI Use

Back to Opal

Export to Excel



12. The procedure is the same for all of the letter templates.