Creating Salary Notices – Using Word Mail Merge

Create Spreadsheet(s) from USPS-R

Note: If you already have an Excel spreadsheet created containing next year's new contract information, you may skip this section & proceed with the Mail Merge section of this document.

1. Log into USPS-R.

2. Create an Excel spreadsheet using one of the following options:

    a. Customize a grid and generate a spreadsheet from a grid report
        i. Go to desired grid.
            1. **Core/Compensation/Contract Compensations** to pull current year contract data which you plan to update for the new year in Excel
            2. **Processing/New Contracts** if populated with next year contract data
            3. **Core/Compensation/Non Contract Compensations** for all non-contract employees

        ii. Click the More button at the top of the grid to add/remove columns as needed until all fields needed to complete your salary notices are displaying. You may also need to add columns that will assist with filtering (i.e. Compensation Start Date, Compensation Stop Date, Job Status, Pay Group, Label, etc.)
            1. Be sure to add Primary Email Address if wanting to e-mail the notices.

        iii. Filter the grid as desired.
            1. Select column to filter by and how to filter.
                a. i.e. Label =FY23, Compensation Start Date >=7/1/2022, job status Active, etc.
            2. You can filter by more than one column if desired.

        iv. Sort grid as desired by clicking on column headers. Click on the same column header again to change between ascending/descending. Hold your SHIFT key while clicking on a second column header to add a secondary sort if desired.
            1. i.e. Last Name, ascending; First Name, ascending

        v. Click the Report button at the top of the Grid. Select Format of **Excel-Data** and click Generate Report.

    b. Go to Reports/Report Manager.
        i. Generate the **LACA New Contract Compensation Worksheet (Updated)**

1. Enter Query Options as desired
2. Generate to **Excel-Data**

3. Open the resulting Excel spreadsheet.

4. You may now delete any unneeded columns, shorten column headings, format dollar figures, and make other changes as necessary (i.e. update compensation label, contract amount, contract start/stop dates, etc.).

5. Save and close your spreadsheet.

Using Mail Merge with Excel – Word 2007, 2010, and 2016

Note: You must first have an Excel spreadsheet as your data source.
Note: The below instructions are for Microsoft 2007 and 2010 Word. You will need to use the Merge Wizard.

1. Access **Microsoft Word**. To use an existing letter as a form letter, open the letter. To create a new letter, you must have a blank document open.

2. On the **ribbon**, click **Mailings/Start Mail Merge/Step by Step Mail Merge Wizard.** The Mail Merge Wizard will appear on the right side of your screen.

3. Step 1. Select document type
   a. **Letters** is the default.
   b. At the bottom of the page, click **Next**: Starting Document.

4. Step 2. Select Starting Document
   a. **Use the current document** is the default. If you have your mail merge document from last year open, select **Use the current document.**
   b. If you want to create a new document and you opened a blank document, you will also select **Use the current document**.
   c. If you want to use last year's document but do not have it open, click **Start from existing document**, click **Open,** browse for your mail merge document and click **OK.**
   d. At the bottom of the page, click **Next**: Select recipients.

5. Step 3. Select Recipients
   a. **Use an existing list** is the default.
   b. Click **Browse** and find the Excel spreadsheet you created for the merge. Select the spreadsheet and click **Open.**
   c. A pop up box will appear, **Confirm Data Source** (if you do not see this, see the Note at the end of this document).
      i. Select **MS Excel Worksheets via DDE (*.xls).**
      ii. If this option is not listed, click **Show All.**
   d. Select **Entire Spreadsheet**. Click **OK.**
   e. A pop up box, **Mail Merge Recipients**, will appear listing everyone on your spreadsheet. Click **OK.**
   f. Click **Next**: Write your letter.

6. Step 4. Write your letter
    a. If you are writing your letter now, you will click on **More Items** when you wish to add a merge field to your letter. A pop up box will appear listing all available fields. Highlight the field you wish to insert and click **Insert.** Remember, you need to add a space after a field has been inserted. You also need to add any necessary punctuation.
    b. When finished, click **Next:** Preview your letters.

7. Step 5. Preview your Letters
    a. The first letter will appear on your screen. Make sure it is correct.
   b. Click **Next**: Complete the Merge.

8. Step 6. Complete the Merge
    a. Click **Edit individual letters.**
        i. Merge to New Documents popup will appear. **All** is the default. Click **OK.**
        ii. All of your salary notices will appear on the screen. You can review the notices.
    b. Instead, if you click **Print,** the letters will all merge and your printer popup will appear. You will not get to preview all notices.

9. You may now print your documents. Click **Print.**

Accepting Excel Formatting into Word

Method 1: Use Dynamic Data Exchange (DDE) to connect to the Excel worksheet that contains the data you want to use.

1. In Word 2007, click the Office Button, then click **Word Options**. In Word 2010, click **File**, then click **Options**.
2. Click the **Advanced** tab, and scroll to the General section. Click to select Con**firm file format conversion on open**. Click **OK**.
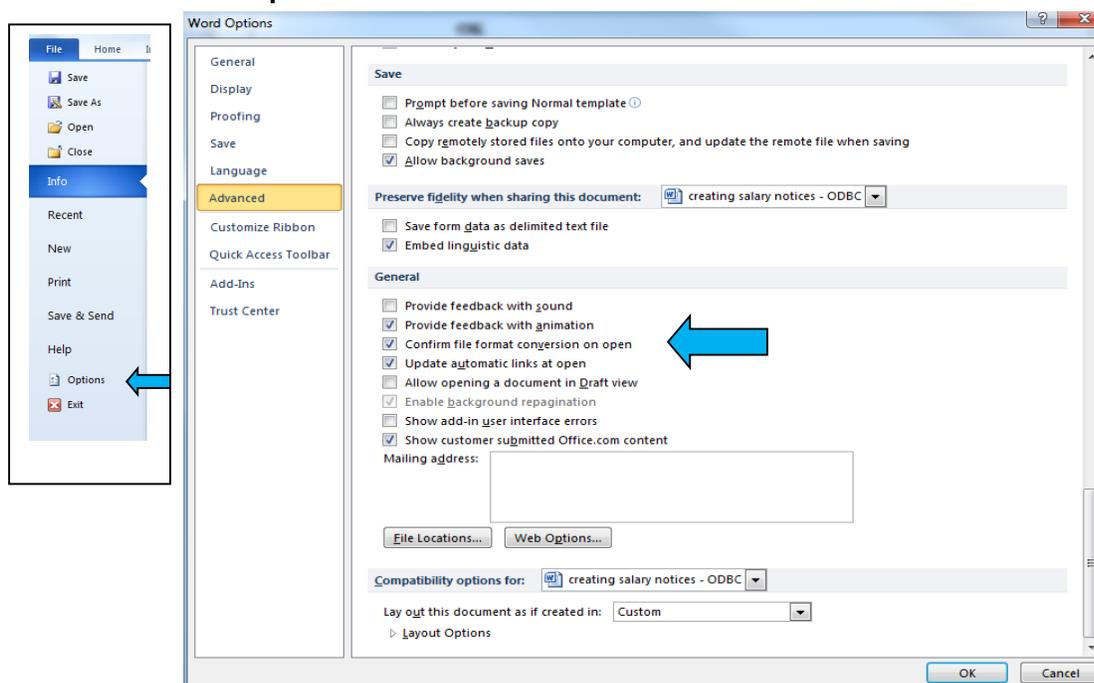
3. Then when prompted by the Confirm Data Source dialog box during the Mail Merge process, click **Show all** and select **MS Excel Worksheets via DDE (*.xls).** Then Click **OK**.

Creating Salary Notices - Redesign & Word
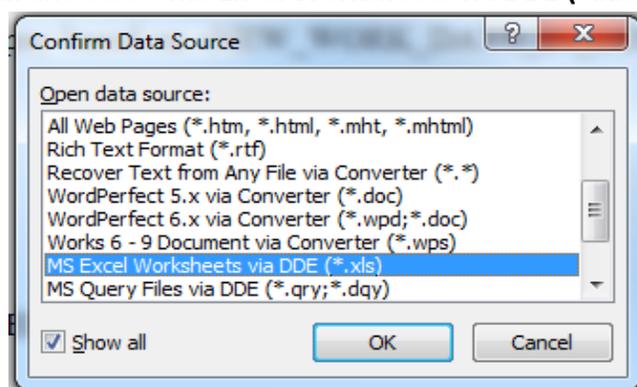
Accepting Excel Formatting into Word (Cont.)

Method 2: Add a Numeric Picture Switch to the merge field to control number and currency formatting.

1. In Word, when creating your merge document, select the field that you wish to reformat.
2. Press **SHIFT + F9** to reveal the field coding. It should look similar to {MERGEFIELD «MyData»}
3. Edit the field so that you get {MERGEFIELD «MyData» \# $,0.00}
4. Position the cursor anywhere in this field and press **F9** to update it.
5. Continue with your mail merge.

Note: The "\# $,0.00" in the field is the numeric picture switch. Other possibilities include:
\# 0 for rounded whole numbers
\# ,0 for rounded whole numbers with a thousands separator
\# ,0.00 for numbers accurate to two decimal places, with a thousands separator
\# $,0 for rounded whole dollars with a thousands separator
\# "$,0.00;($,0.00);'-'" for currency, with brackets around negative numbers and a hyphen for 0 values

The precision of the displayed value is controlled by the "0.00". You can use anything from "0" to "0.000000000000000".

If you use a final ";" in the formatting switch with nothing following, (i.e. \# "$,0.00;($,0.00);") zero values will be suppressed. Note that this suppresses 0s resulting from empty fields and from fields containing 0s.