

Simple Data Sources and Mail Merges for OpenOffice.org 1.x

What's a data source? Data sources are how you get OpenOffice.org to recognize that you've got information in a database, spreadsheet, text file, or other form that you want to use in OpenOffice.org documents.

What's a mail merge? This means you can do things like make a bunch of labels or letters, one for each person in your address book, or you can print a copy of the same letter for every person in the spreadsheet where you keep your customer list.

Firstname	Lastname	Address	City	State	ZIP
John	Hanson	910 Harris Dr	Kalispell	MT	59901
Mary	Jones	11 Main Street	Bozeman	MT	57788
Ellen	Moringue	1788 W 105th	Boulder	CO	80302

Dear John,

Thanks for your order this year. Be sure to let us know if we can do anything in the coming year!

Dan Axtman
Working Knowledge Books

Dear Mary,

Thanks for your order this year. Be sure to let us know if we can do anything in the coming year!

Dan Axtman
Working Knowledge Books

Dear Ellen,

Thanks for your order this year. Be sure to let us know if we can do anything in the coming year!

Dan Axtman
Working Knowledge Books

If you want to use data sources and put them in documents, you need three things.

- 1 Data, such as a spreadsheet, text file, or a database like Oracle
- 2 A data source configuration in OpenOffice.org, pointing to the data.
- 3 A document like a mail merge letter or envelope document for Writer, or for Calc, you might use the Data Pilot.

Exercises

1. Creating Data

Usually you'll have the data already; you might have a spreadsheet or text file of names and addresses on your computer. However, here's an example of how to do it.

Creating a Text File for a Data Source

- 1 Start Notepad or a similar simple text editor and create a new file.
- 2 Type the following, with a tab between each unit of data.

First Name	Last Name	Address	City	State	Postal Code
Martin	Rogers	101 Main St	St Paul	MN	56546
Marilyn	Lundsverk	99 Grand Avenue	St Paul	MN	56549
John	Barton	110 Ludlow	Fargo	ND	57799

- 3 Save the text file as **mysimpletext.txt** or another easily recognizable file name.

Creating a Spreadsheet for a Data Source

You're going to do the same thing you did with the text file, but in a spreadsheet. You can copy and paste the data if you want, or retype it.

- 1 Create a new empty Calc spreadsheet.
- 2 Type the following, each piece of data in a separate cell.

First Name	Last Name	Address	City	State	Postal Code
Martin	Rogers	101 Main St	St Paul	MN	56546
Marilyn	Lundsverk	99 Grand Avenue	St Paul	MN	56549
John	Barton	110 Ludlow	Fargo	ND	57799

- 3 Save the spreadsheet as **mydataspreadsheet.sxc** or another easily recognizable file name.

2. Creating Data Sources

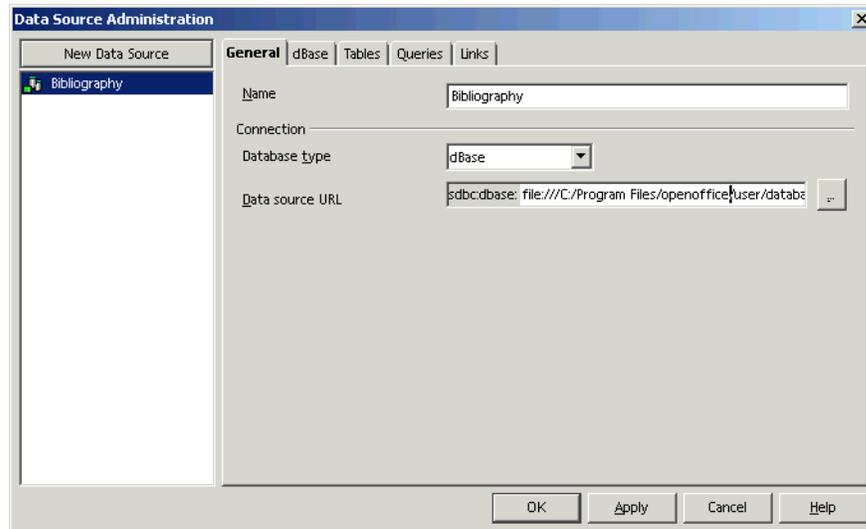
Once you've got data like the text file in the previous exercise, or a spreadsheet like the one stored in your lab files, it's time to create the data source in OpenOffice.org that points to that data.

Creating a Simple Data Source From a Spreadsheet

You've got a spreadsheet full of the names of people who've expressed interest in learning about writing for Working Knowledge's new in-house publishing business. You need to have this information in a data source for the whole department to use.

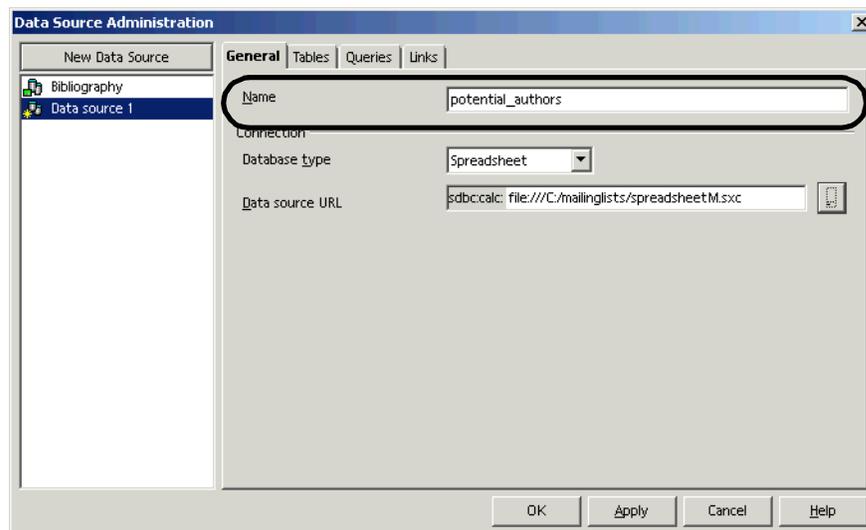
- 1 Locate spreadsheetM in the mailmerge directory of your lab files; **don't open it**.
- 2 Copy it to a new directory, such as **datasources**.

3 Choose Tools > Data Sources.

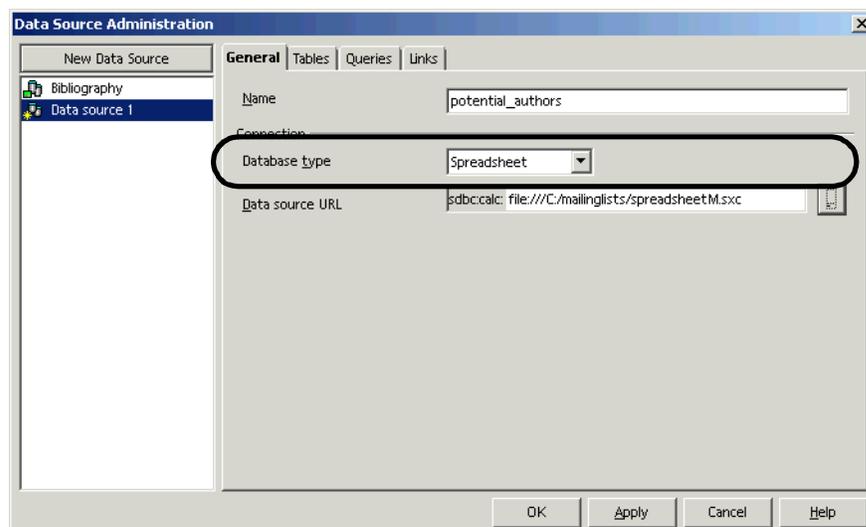


4 Click New Data Source.

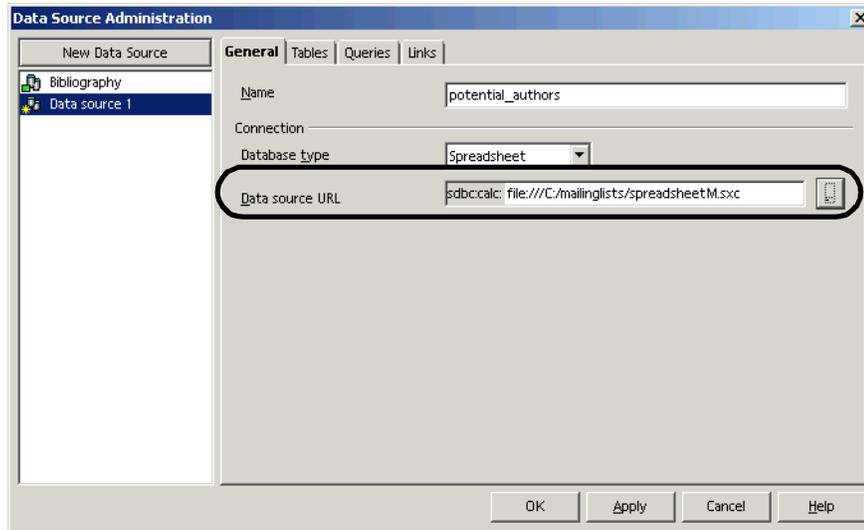
5 Type a name for the data source, **potential_authors**.



6 In the Database Type dropdown list of the window, select Spreadsheet as the type.



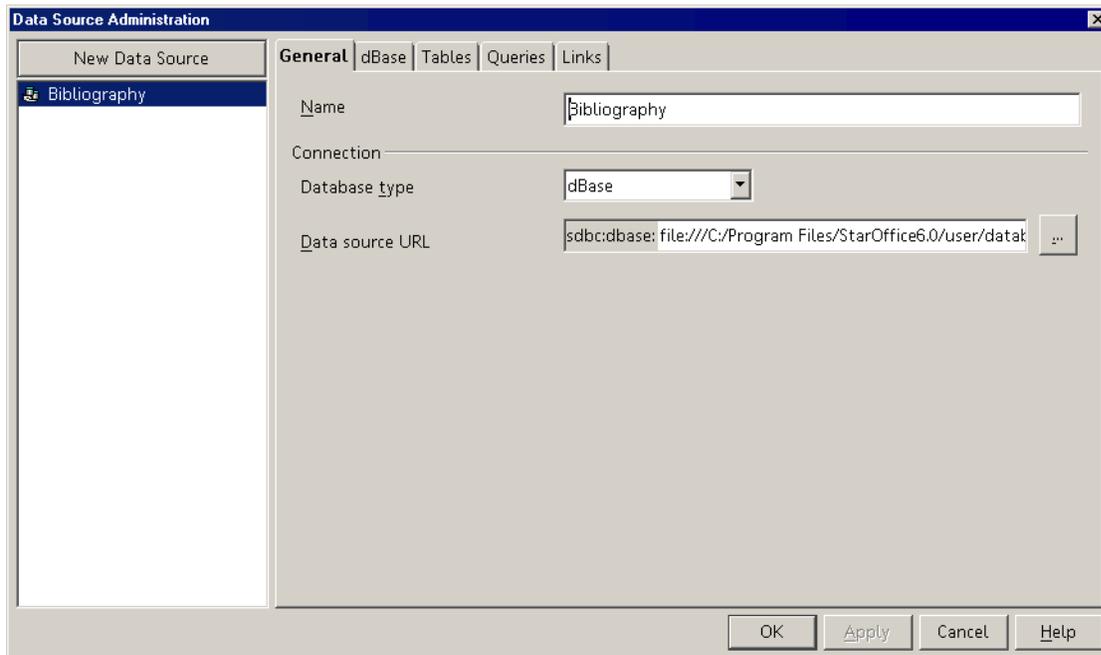
- 7 In the Database URL field, click the browse icon and specify **spreadsheetM** in its new directory.



- 8 Click OK to close the window and save your new data source.

Creating a Simple Data Source From a Text File

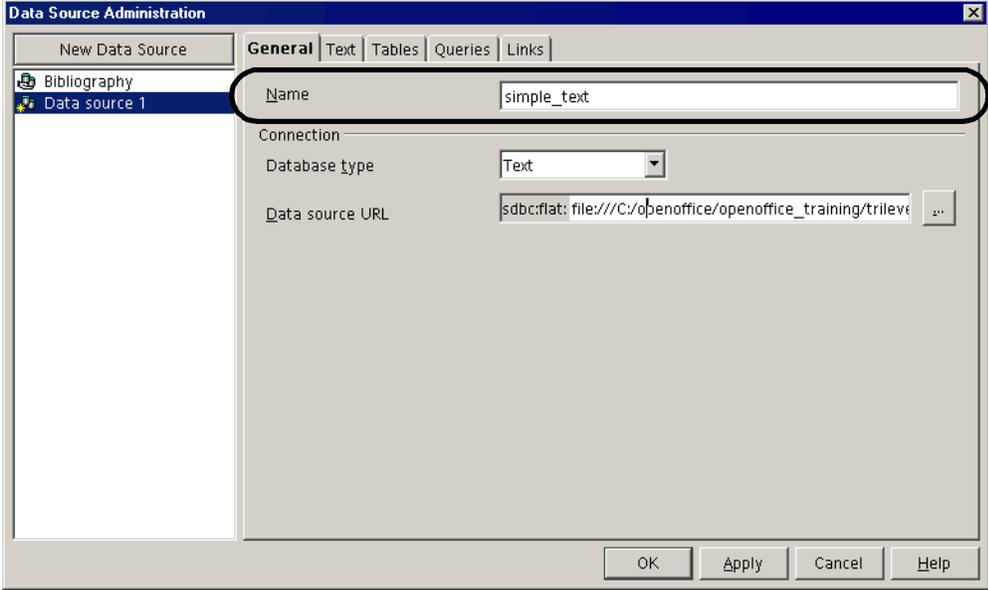
- 1 Start an OpenOffice.org Writer document if it's not already open.
- 2 Choose Tools > Data Sources. The Data Source Administration window will appear.



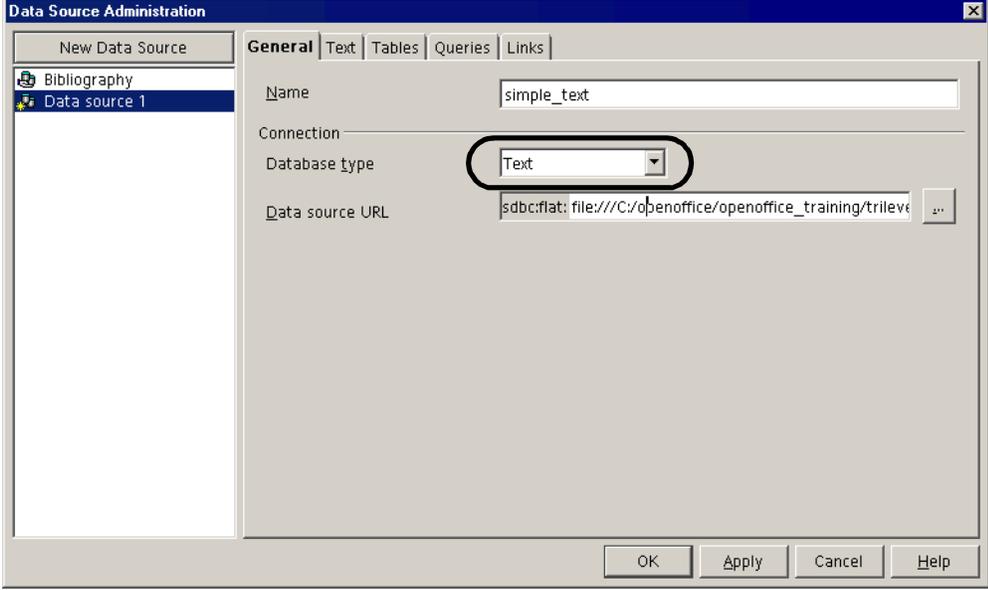
- 3 Click New Data Source.



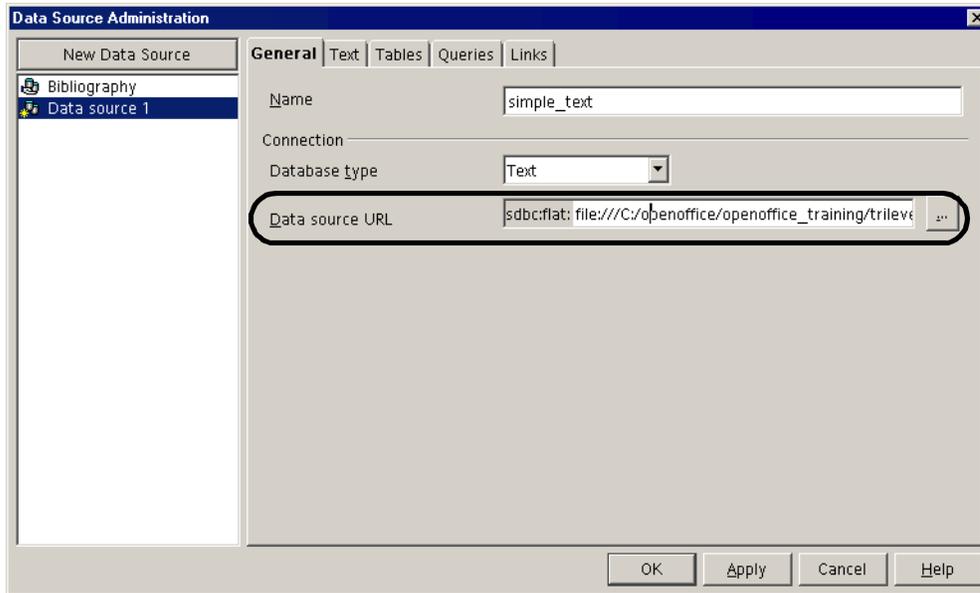
4 Name the data source **simple_text**.



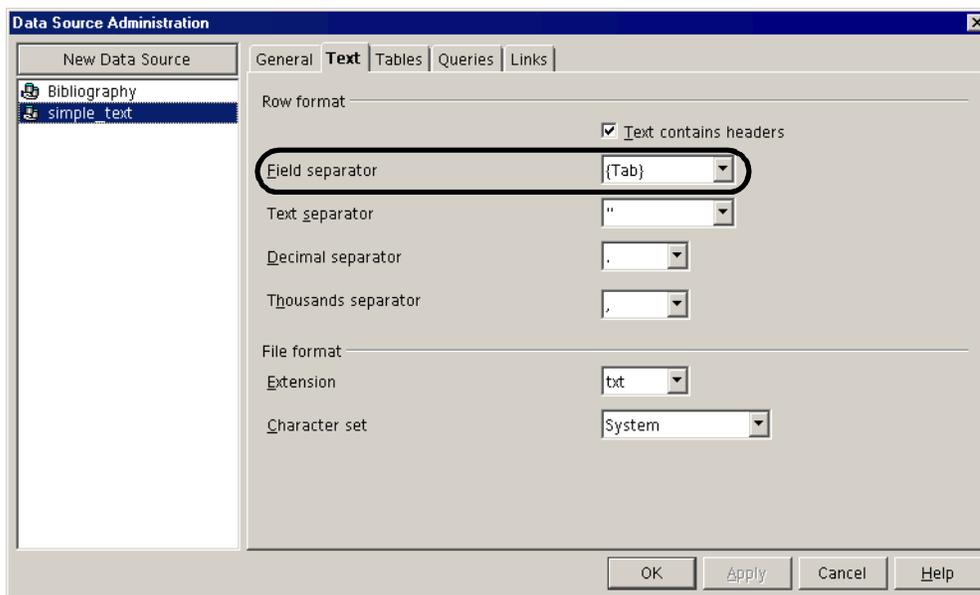
5 Select Text in the Database Type dropdown list.



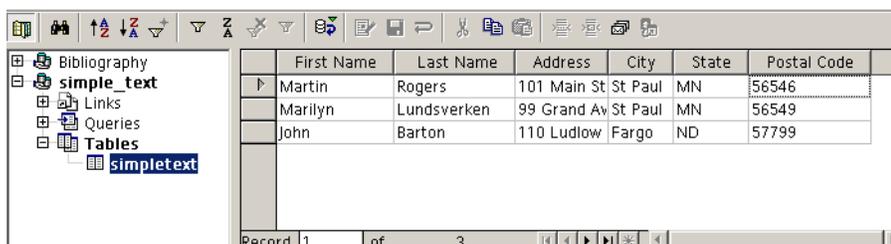
- 6 Use the browse icon in the Database URL field to specify the directory where the text file you created is.



- 7 Click the Text tab.
8 Select Tab as the field separator.



- 9 Click OK to close the window and save changes.
10 Choose View > Data Sources.
11 Click the + symbol by the **simple_text** data source, then click the + by Tables. It should look something like this.



The data source is ready for use with mail merge autopilots, labels, the Data Pilot, and other tasks.

3. Creating Mail Merge Documents

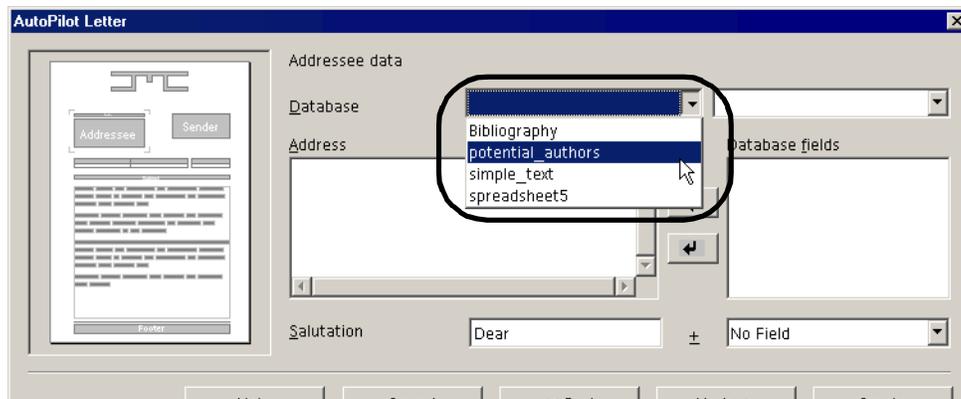
You've got data, and you've defined a data source. Now you just need to put all that data in a document like labels, a mail merge letter, or envelopes.

Creating a Mail Merge Letter Using the Letter AutoPilot

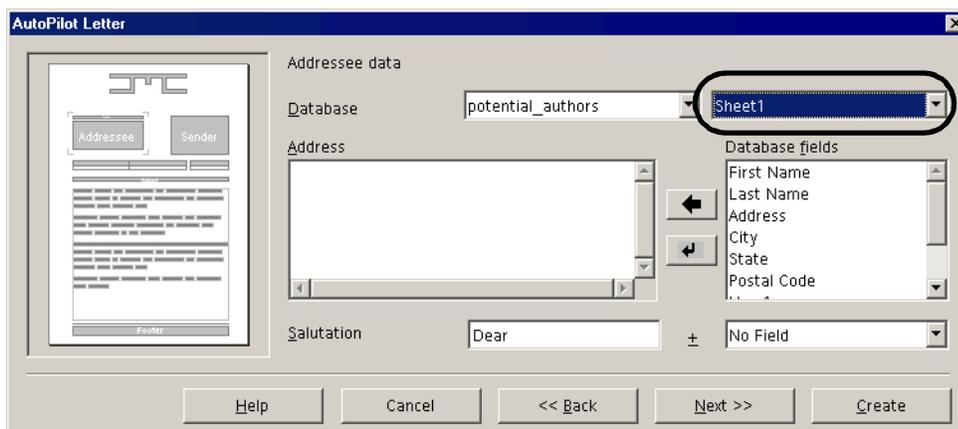
- 1 Choose File > AutoPilots > Letter.



- 2 Accept the defaults in the first window and click Next, then click Next in the second and third windows too.
- 3 Click Next.
- 4 When you reach the fourth window, select your new potential authors data source in the first dropdown list.

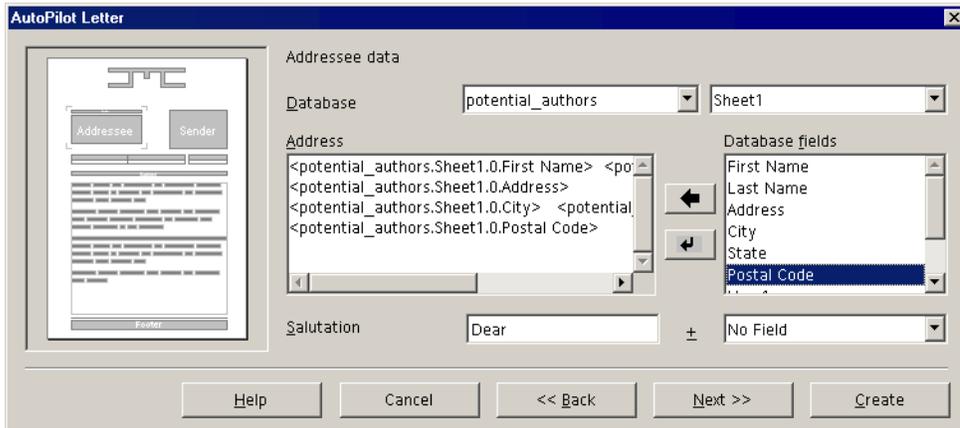


- 5 Select the Sheet1 table listed in the second dropdown list.

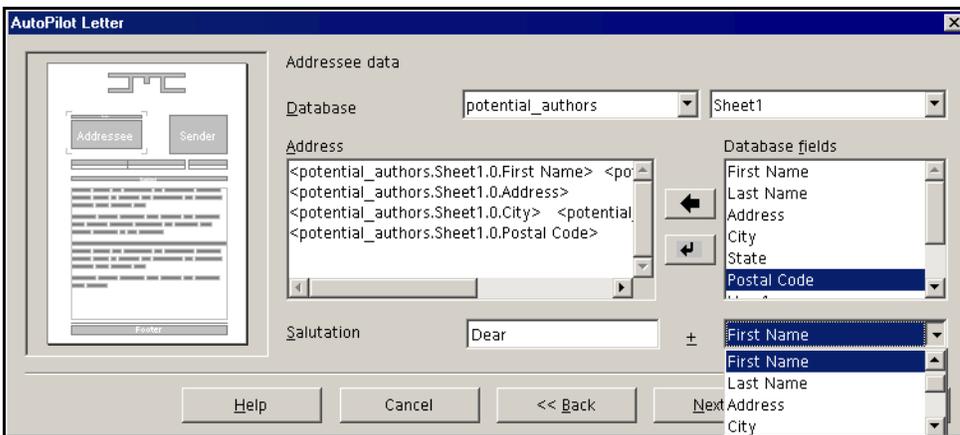


- 6 Select the first name, last name, address, city, state, and postal code fields and click the arrow to move them from the Database Fields list into the Address Fields list. Type a space after each field you insert, since the

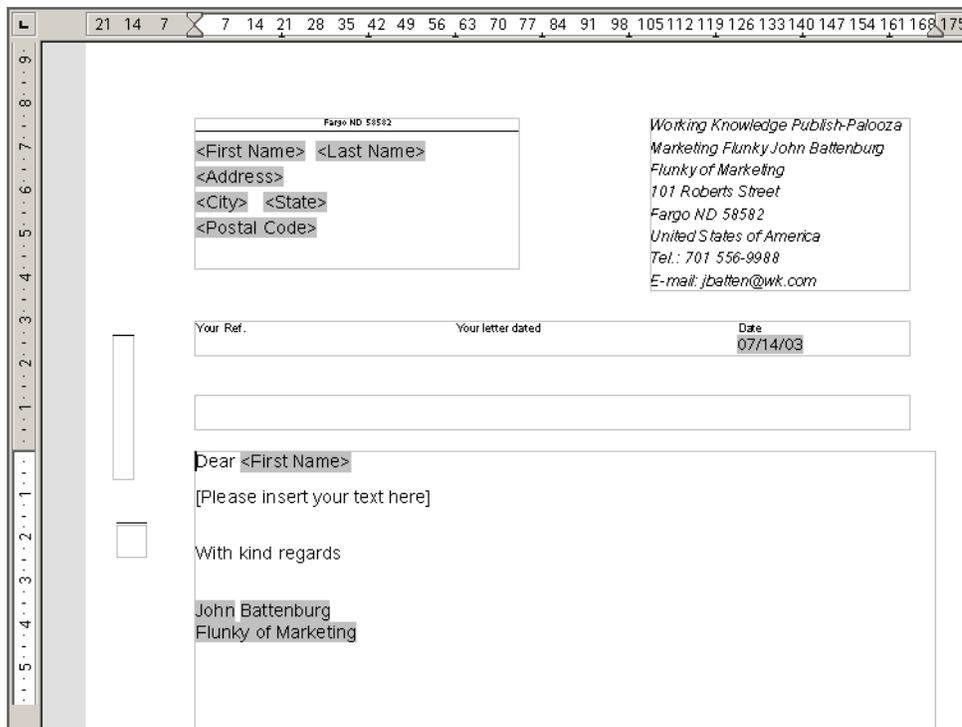
fields aren't automatically spaced apart, and click the new line arrow button after the last name and address fields.



7 In the dropdown lists at the bottom, keep Dear as the salutation and Firstname as the other field.



8 Click Create. The new mail merge document will appear.



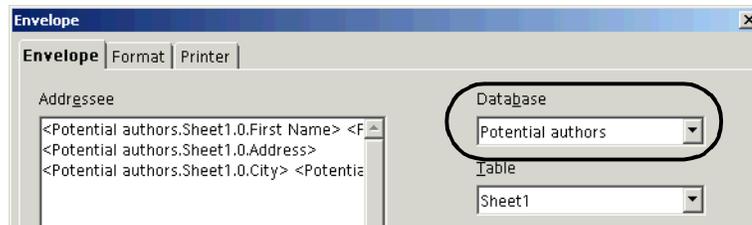
- 9 Save it in your lab files directory, with the title **my_lettertoauthors**.
- 10 Type some brief text in the new document, telling the recipients they are invited to a presentation at 10 AM this coming Saturday.

Creating Mail Merge Envelopes

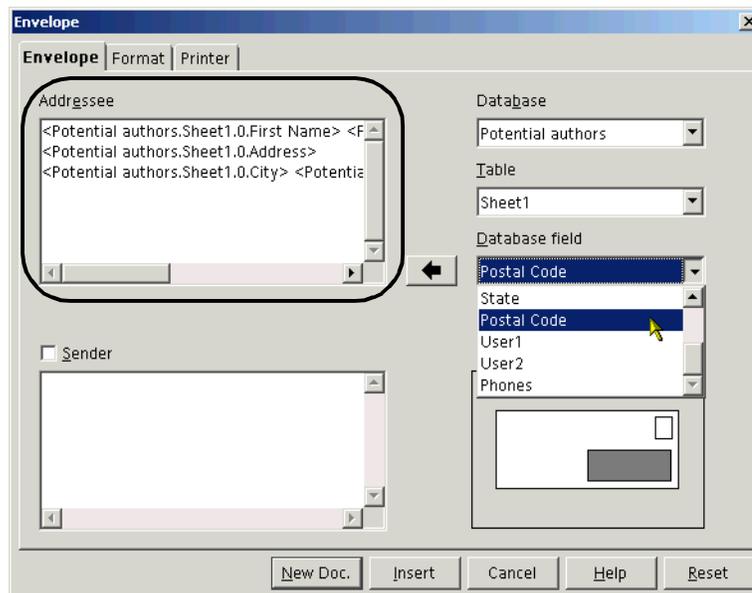
You'll need to have addressed envelopes for each of these letters, as well. You can do this by printing labels, or by printing on the envelopes directly.

To print envelopes, you'll create a new Writer document, and set it up to print a specific type of envelope. It must exactly match the kind of envelopes your own printer can create.

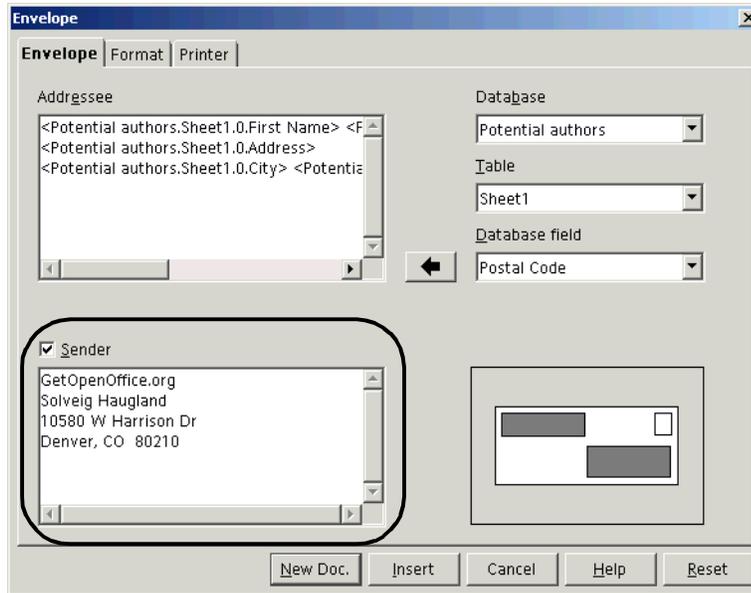
- 1 Create a new Writer document.
- 2 Choose Insert > Envelope.
- 3 Click on the Envelope tab if it's not already showing.
- 4 Select Potential Authors from the datasources dropdown list and Sheet1 from the Table list.



- 5 In the Database Field list, select the first field to insert, such as name, and click the bold arrow next to it to insert the field in the Addressee area. Type a space after the newly inserted field.
- 6 Insert all additional name, address, city, state, and postal code information, inserting spaces between fields and moving to a new line as appropriate.

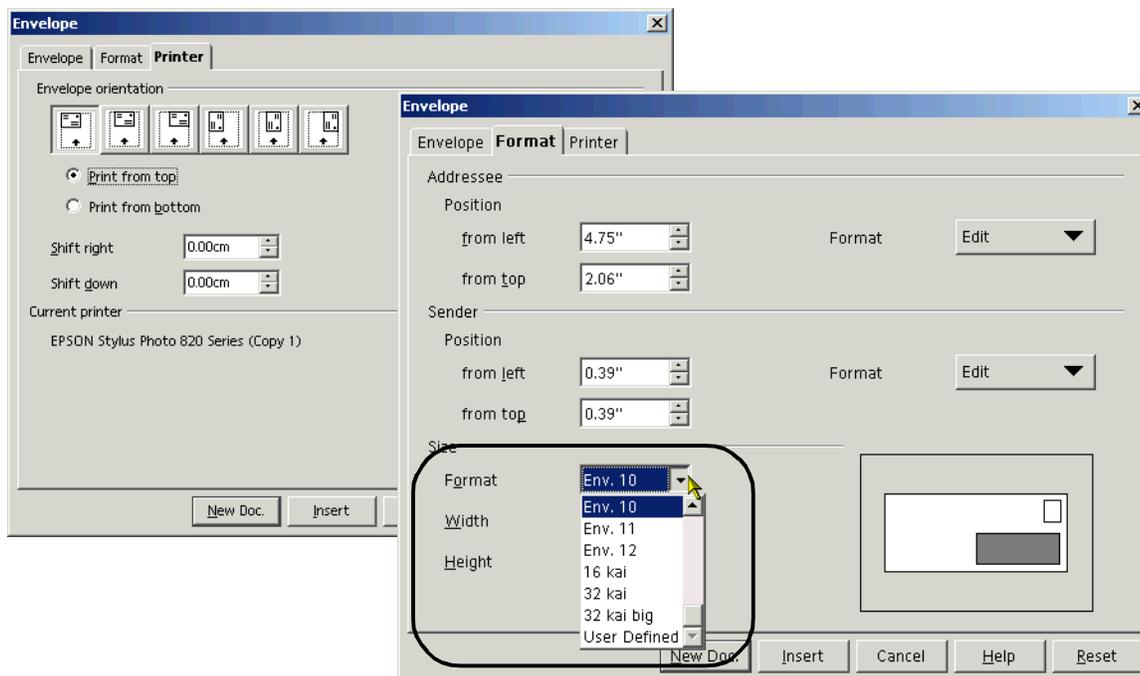


- 7 Click the Sender checkbox. Type or paste the sender name and address in the Sender field.



- 8 Click New Doc to create the envelope document.

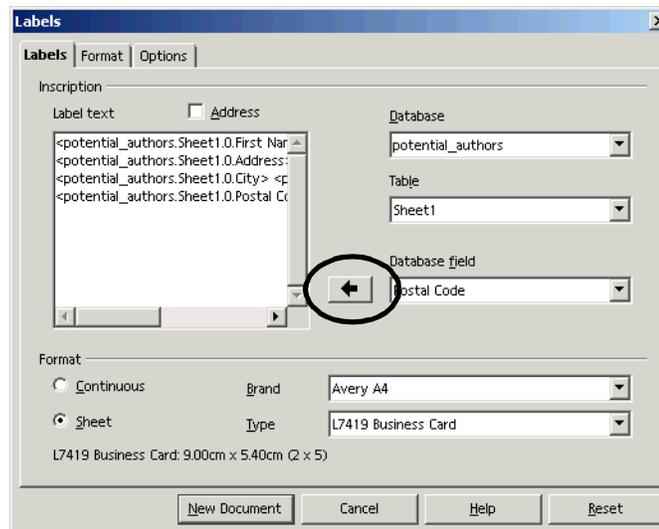
Note – If you have any problems printing, click the Printer tab when you perform this procedure. Note where the envelope will print in the paper tray, so that you can insert envelopes correctly during printing. Additionally, in the Format tab, make sure that the envelope type listed there is the same one your printer is set up to print. Envelope 10 is a common envelope type.



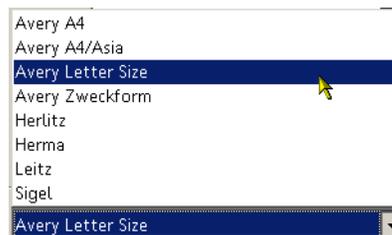
Creating Mail Merge Address Labels

- 1 Choose File > New > Labels.
- 2 In the Labels tab of the Labels window, select the data source you created, such as Potential Authors, from the Database dropdown list.
- 3 Select a table, such as Sheet1, from the Table list.

- 4 Select the first field you want to use from the Database Field list, and click the arrow next to it to insert it in the text field. Type a space after the field.
- 5 Use the Database Field list to insert the appropriate address fields, spaced appropriately and on the correct lines.



- 6 In the **Brand** dropdown list, select Avery Letter Size.



- 7 In the **Type** dropdown list, scroll through the billions of labels. Select 8160 Inkjet Address.



- 8 Click New Document. The labels will appear.

Note – Using the Synchronize feature here isn't useful since it just puts the same data in every single field. If you want to do formatting, use styles and just apply each style to each frame.

Note – If you have any problems printing, check your printer setup using your operating system setup tools.

Creating a Mail Merge Document From Scratch

- 1 Create a new Writer document.
- 2 Choose View > Data Sources.

- 3 Select the Potential Authors data source and expand to see the table.

First Name	Last Name	Address	City	State	Postal Code	User1	User2
Marcus	O'Reilly	8 Pearl	Boulder	CO	80402	Long Live the Uzar	
Steve	Roberts	557 Oak	Lafayette	CO	80026	Warmth of the Sun	
Alan	Simpson	909 17th Av	Kalispell	MT	59901	Free as Fondue	
Patricia	Roan	88999 Main	Lafayette	CO	80027		
Cathy	Sierra	22404 1149th	Missoula	MT	58800		
Joan	Lundsverk	910 1st Str	Boulder	CO	80306		
Simon	Roberts	405 9th Ave	Lafayette	CO	80026		

- 4 In the document, choose Insert > Fields > Date to insert the date field.

- 5 Type **Dear**, then drag the First Name field into the document.

Date (fixed)

Dear

- 6 Type the rest of the document as shown, dragging also the **User1** field into the document at the appropriate spot.

Date (fixed)

Dear potential_authors.Sheet1.First Name,

Congratulations! Your proposal, titled potential_authors.Sheet1.User1, has been accepted by our publishing company. A representative will be contacting you shortly.

Sincerely,

John Battenburg

- 7 Save the document.

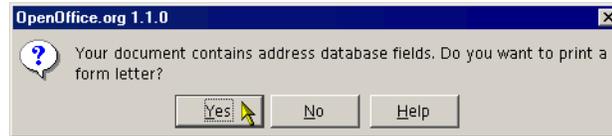
Printing Mail Merge Documents

Printing is nearly the same as a normal document; you just get an extra window where you can select which data source to use, and which records to print.

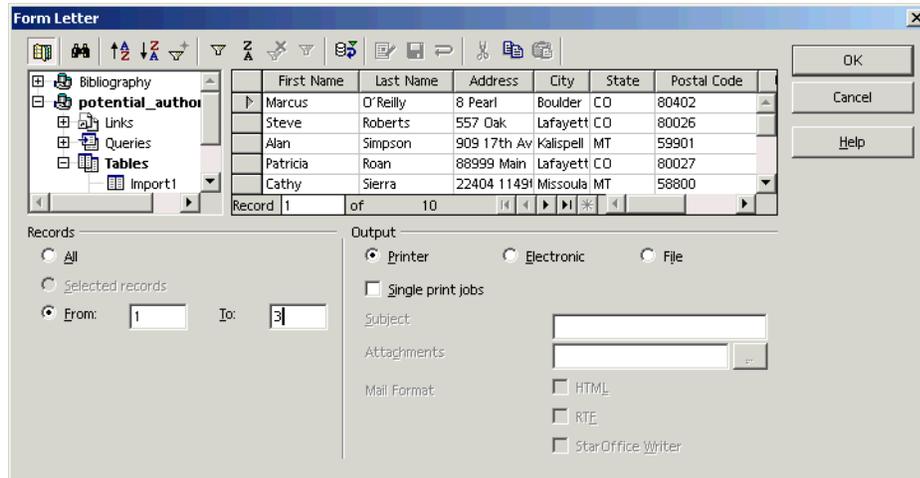
Printing a Mail Merge Letter

You're ready to print the letter that you created in a previous lesson.

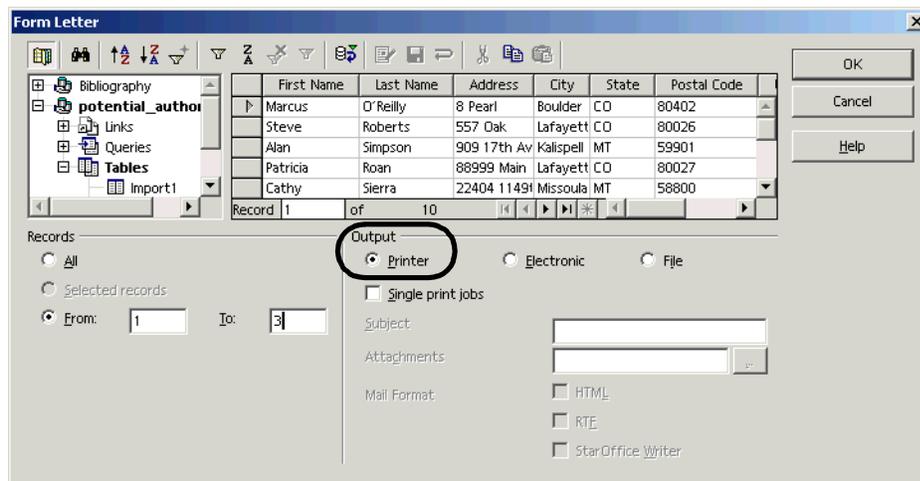
- 1 Open the lettertoauthors.sxw document if it's not already open.
- 2 Choose File > Print.
- 3 You'll be asked whether you want to print a form letter. Click Yes.



- 4 In the printing window, select only the first three records. You'll print all the letters to all recipients later when you're sure the letter looks the way you want.



- 5 Be sure that the printing destination is Printer.

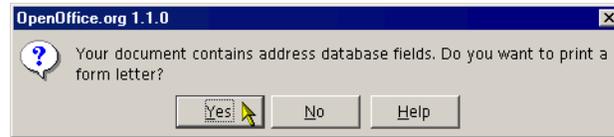


- 6 Click Print.
- 7 The standard printing window will appear. This is where you specify standard printing information such as number of copies and the pages to print. Then click OK to print the letters.

Printing Mail Merge Envelopes

- 1 If you created a mail merge envelope before, open it or switch to it.
- 2 Choose File > Print.

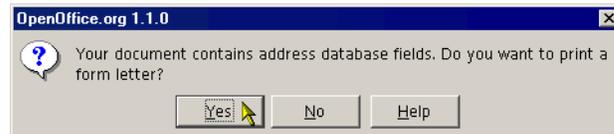
- 3 You'll be asked whether you want to print a form letter. Click Yes.



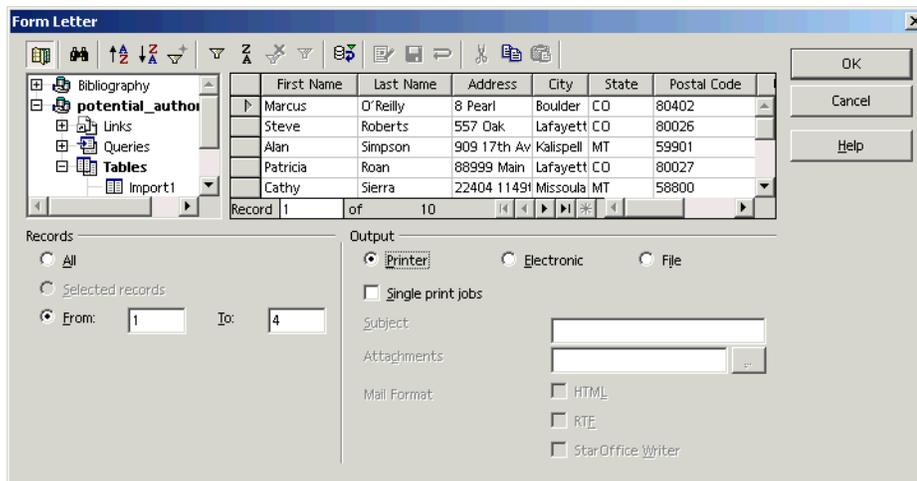
- 4 In the Form Letter window, specify that you want to print the first three records.
- 5 Be sure Printer is selected.
- 6 Click OK.
- 7 Specify the printer to print to and click OK.
- 8 Feed envelopes into the printer.

Printing Labels

- 1 If you created a mail merge envelope before, open it or switch to it.
- 2 Choose File > Print.
- 3 You'll be asked whether you want to print a form letter. Click Yes.



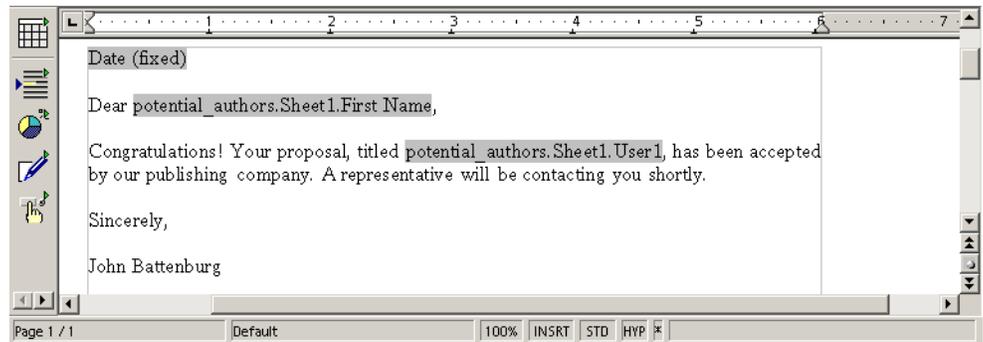
- 4 In the Form Letter window, specify that you want to print the first three records.



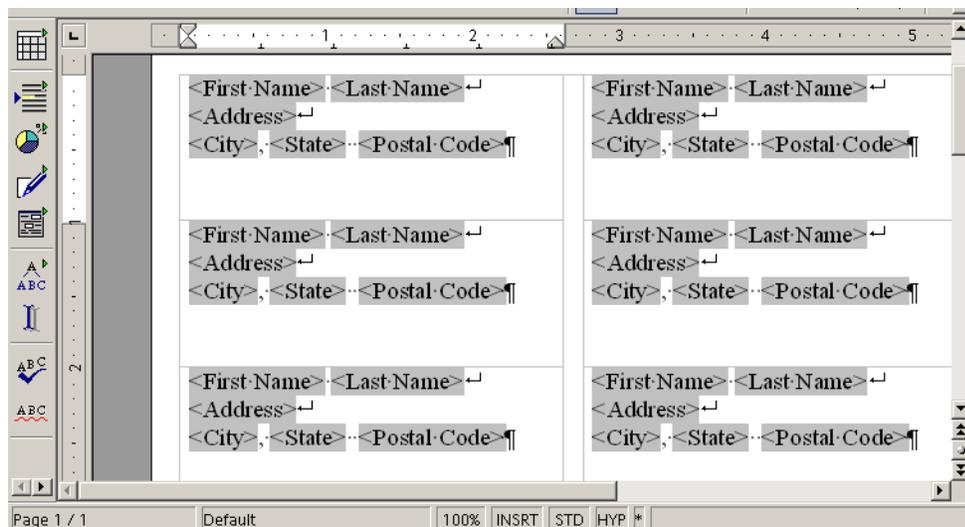
- 5 Click OK.
- 6 Specify the printer to print to and click OK.

Previewing the Data That Will Print in Mail Merge Documents

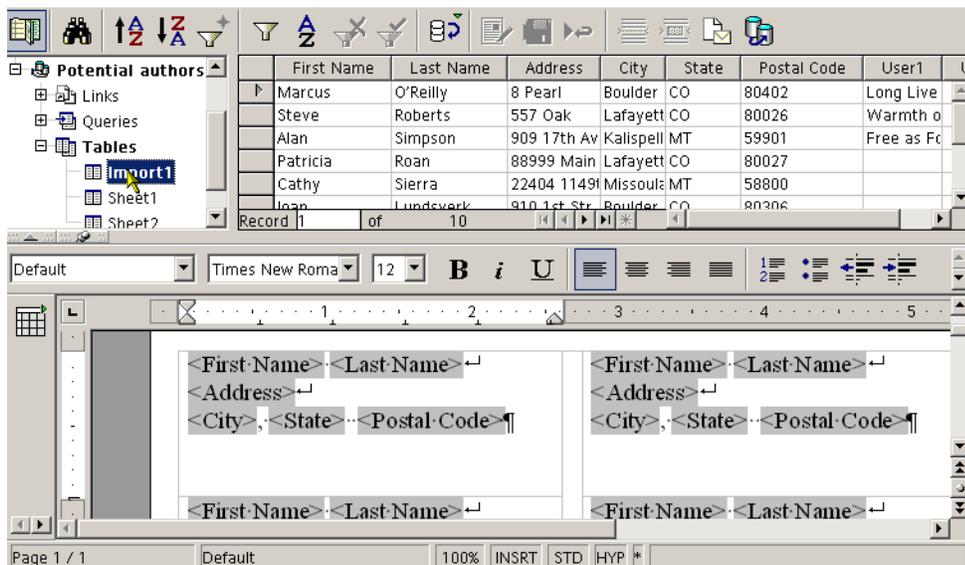
When you create a document, you see something like this: the references to the data source rather than the data itself. This is fine; the documents will print with the right data. However, if you want to preview what the document looks like with data instead, follow these steps.



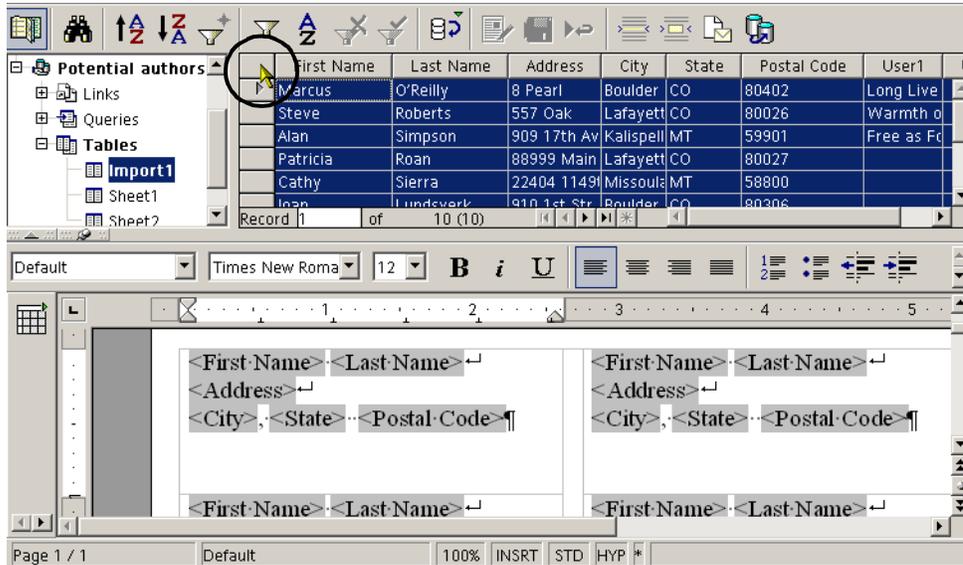
- 1 Be sure your mail merge document, such as labels or a letter, is open.



- 2 View data sources by choosing View > Data Sources. The data sources you have created will be displayed.
- 3 Find the data source you're using and click the + sign by it to expand it. Click the + sign by the Table heading under that data source, then select the table you're using.



4 The data you're using will appear. Click the indicated box in the data area.



5 Click the indicated icon, Field to Data, to show data instead of field references. If the data still isn't displayed, choose View > Fields.

