S ATHLETIC TRAINERS we spend a lot of time collecting and storing information—athlete names, results of physical examinations, assessments of athletic training students, and so on. Many times this information is stored electronically to facilitate easy searching and retrieval. Wouldn’t it be valuable to be able to prepare a document (e.g., letter, email, report) that was customized for each recipient and could be automatically updated by simply modifying the table holding the stored information rather than having to individually change several letters one at a time? This would make customized reports and letters that did not necessarily look “mass produced.”

The mail-merge function in Microsoft Word® enables the user to create a set of documents that are essentially the same except where each document contains unique elements. For example, perhaps the completed preparticipation physical examinations on all the athletes at your institution are entered into a data-storage program (e.g., database, spreadsheet). It is a fairly simple process to reuse this same information in multiple ways without having to retype it over and over again. For example, addresses from the data source can be extracted to create mailing labels or to generate a report that compiles all of the insurance information and allergy information onto one page to send with the team when it travels. Creating each report individually would take hours. That’s where mail merge comes in. When using mail merge, it is as simple as creating one document that contains the information that is the same in each version and adding some placeholders for the information that is unique to each version. Word takes care of the rest.

A document that automatically merges information from a table can be created in four easy steps: (1) choosing the document type, (2) connecting a data field to the document and selecting records, (3) adding fields to the main document, and (4) previewing the merge and then completing it. These steps might sound complicated and foreign to the novice Microsoft Word user, but this column will walk you through the process to make this seemingly daunting feat easy.

**Setting Up the Document (Choosing the Document Type)**

Begin with a blank Word document. Go to the Tools menu, select Letters and Mailings, and then click on Mail Merge… (or Mail Merge Wizard for Word 2002 users). This process will open up a task pane that will ask you some simple questions as Word helps guide you through this process.

The first task pane asks what type of document you want to create (Figure 1). The choices provided include...
many different types of documents—letters, e-mail messages, envelopes, labels, and even a directory. Simply click on the circle to the left of the type of document you want and then click Next at the bottom of the task pane.

The next task pane that is presented asks if you would like to start a new document or use an existing one (Figure 2). It might be desirable to use an existing document if you have a form that has been consistently used for, say, physical examinations. This would be appropriate if you would like to precomplete some of the information before the physicals so that athletes can simply confirm the information they provided the previous year. These forms can be generated and printed so that some of the work has already been completed, saving time during the physical exams. Once you have made your selection, click Next at the bottom of the task pane.

Show Me the Data (Connecting the Data Fields)

The next step in the process is showing Word where to find the information you want it to include in your document. Again, you are presented some options. The scenario discussed previously would involve an existing data source (i.e., the spreadsheet containing the physical-exam results). This task pane requires two steps. First select the option button next to “Use an existing list.” Next, click on “Browse…” to locate the file containing the data (Figure 3). After you direct Word to the data file you want to use, the Mail Merge Recipients dialog box opens (Figure 4). You can select a subset of records for the mail merge by sorting or filtering the list. After choosing the records you can move on to the next step.