



Interfacing with MS Office Conference 2019

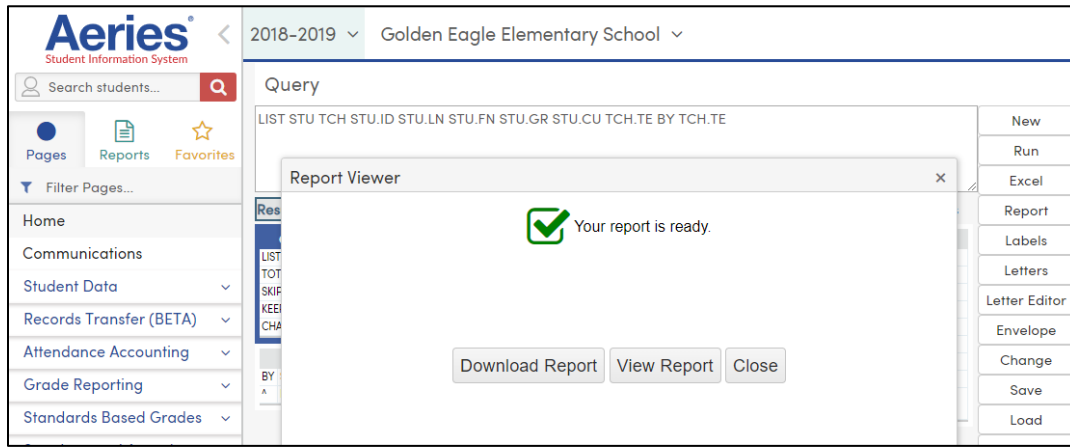
Session Description: This session will detail procedures for importing/exporting data between AeriesSIS Web Version and other software packages, such as word processing and spreadsheet programs; creating merge documents, certificates, charts and graphs: add/import data.

- 1. Create Excel Files from Aeries Web**
- 2. Modify to be Used by Companies / Consultants**
- 3. Merge With Microsoft Word 2016, 2013 and 2010**
Creating Document During Merge
Merge to Existing Document
- 4. Merge With Microsoft Publisher 2016, 2013 and 2010**
Easy Mail Merge for Creating Labels Using Merge File
Easy Data Merge for Awards Using Merge File

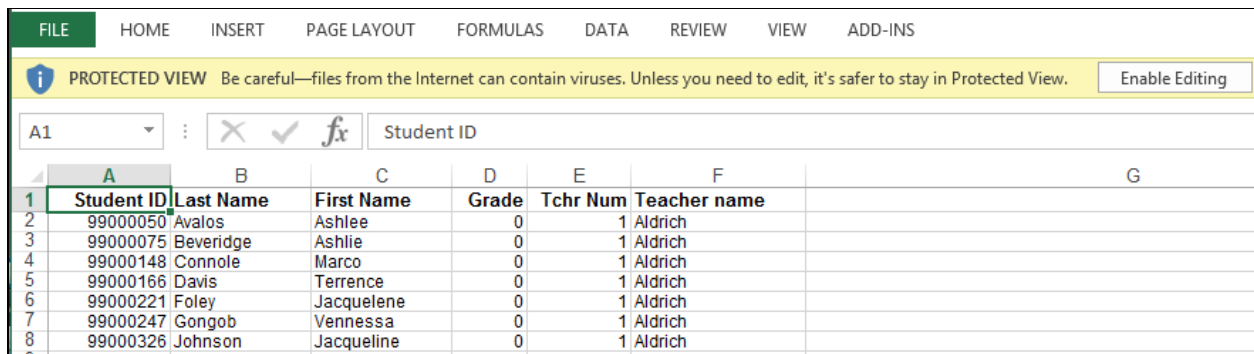
Create an Excel File from the AeriesSIS Web Version

This is the basic start to all the procedures in this document when using the Aeries Web Version

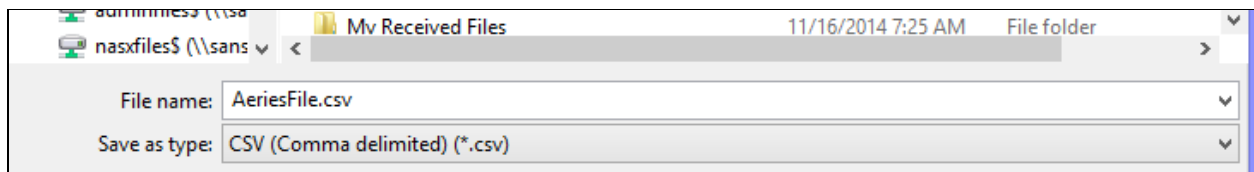
- Create a Query Statement **LIST** and select all fields to be used, then select the **Excel** button"
 - Ex: LIST STU TCH STU.ID STU.LN STU.FN STU.GR STU.CU TCH.TE BY TCH.TE
- Select Download Report, Click the dropdown in the lower left then Open on the file
- This will produce an Excel Spreadsheet



- Be sure to click the Enable Editing Button



- Select File | Save As. Place in a folder and give a name that you will be able to use in the future
- When saving, the Save Type may be changed to a CSV to create a simple Comma Delimited file



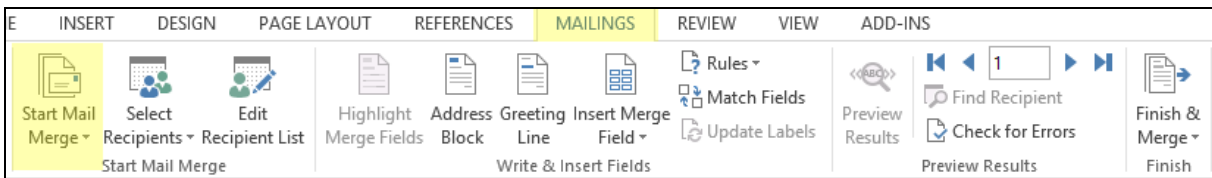
Create Export Files for Other Companies or Consultants

- To create export files for a Photography Company, Testing Data files for Consultants etc.
- File should be based on Perm ID Number
- Consultant should already know how to import file to their program from an XLS or CSV format
- Need to create the file with data in order specified by Testing Data Consultant, Photo Company, etc.

Word Office 2016, 2013 and 2010 version

This procedure allows for merging into an existing file.

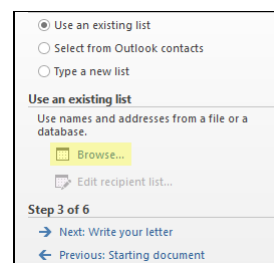
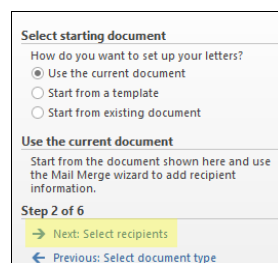
- Start with the existing document open
- Select **Mailings | Start Mail Merge | Step by Step Mail Merge Wizard**



- From the right side of the screen choose the document type **Letters**

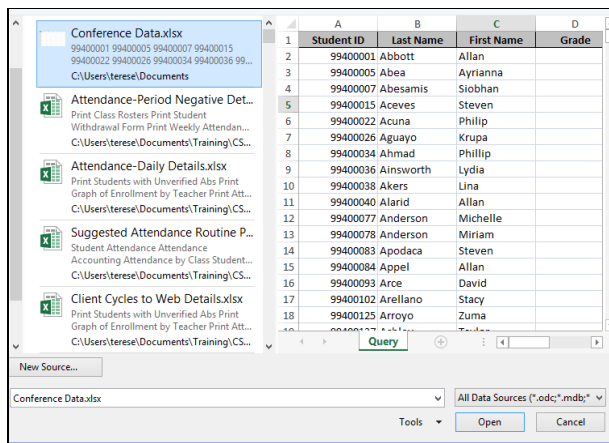


- At the top of the screen click on **Starting Document**
- From the right side of the screen choose **Use the Current Document**
- At the bottom of the screen click on **Use an existing list**
- From the right side of the screen select **Browse**

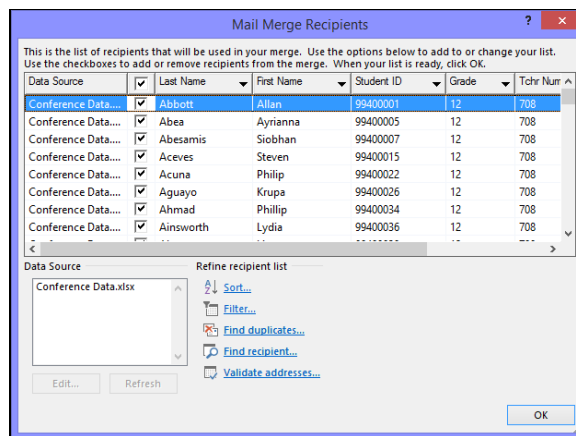
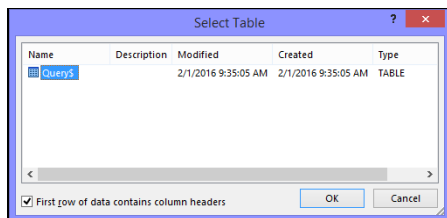


- In the **Select Data Source** Window change the **Look In** to **C:\Eagle**

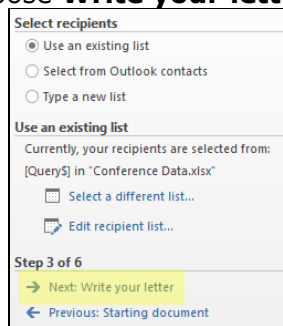
- Select the file created in Aeries Query then click **Open** (or double click the filename)



- In the Select Table leave it at the default **Query\$** and select OK
- When the Mail Merge Recipients Appears, select OK

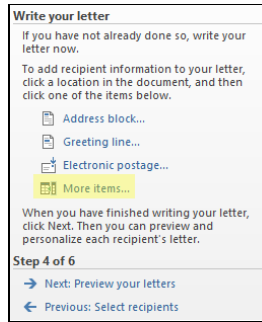


- From the right side of the screen choose **Write your letter**

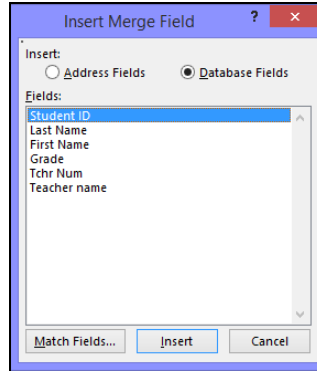


- Place the cursor in the area where the merged data will print, for example, student name

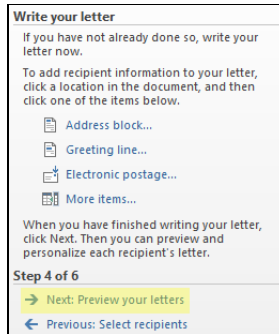
- Click the mouse on **More Items** on the right side of the form



- From the **Insert Merge Field** box select the field to be inserted then click **Insert**

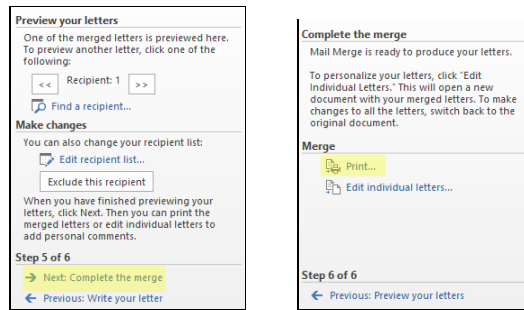


- Return to the document, perform again until all fields are located properly on the document
- The **Fields** selected will display on the document from the file created
- From the right side of the screen select **Preview your letter**



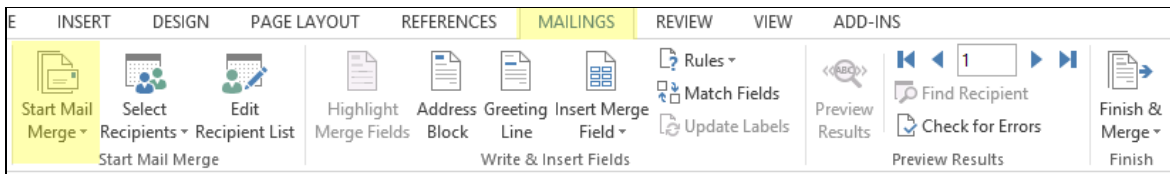
- The **Mail Merge Recipient and other information** will display where the merged data will print, for example, student name
- To preview other recipients click on the **Recipient** arrows on the right top of the screen
- When complete click the mouse on **Complete the Merge** on the right side of the form

- To print click **Print** on the right side of the form

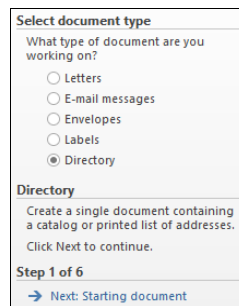


This procedure is used to create a new document for merging – Student Award Listing.

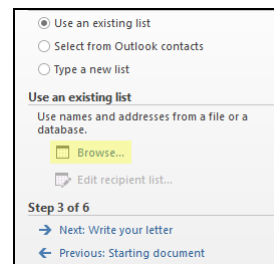
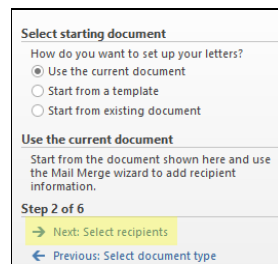
- Start with a new blank document
- Select **Mailings | Start Mail Merge | Step by Step Mail Merge Wizard**



- From the right side of the screen choose the document type **Directory**
- At the bottom of the screen click on **Starting Document**

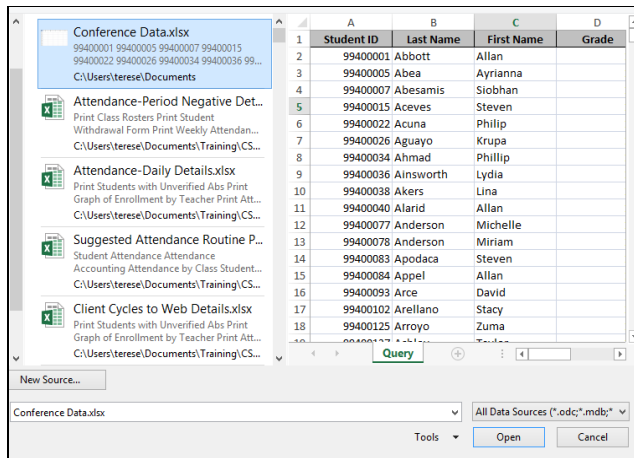


- From the right side of the screen choose **Use the Current Document**
- At the bottom of the screen click on **Use an existing list**
- From the right side of the screen select **Browse**

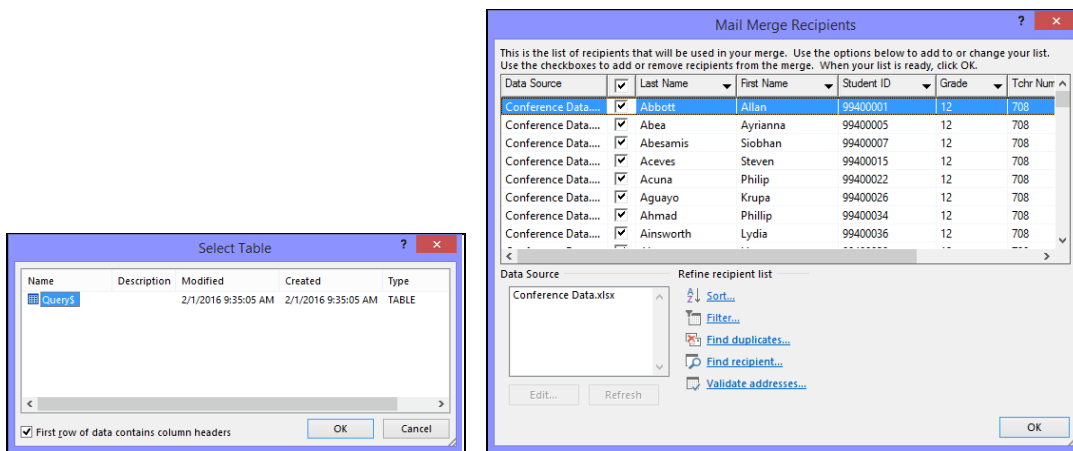


- In the **Select Data Source** Window change the **Look In** to **C:\Eagle**

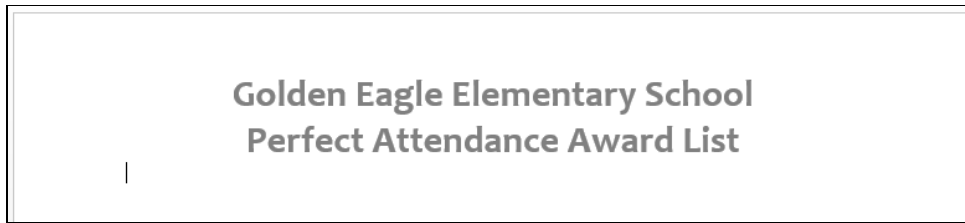
- Select the file created in Aeries Query then click **Open** (or double click the filename)



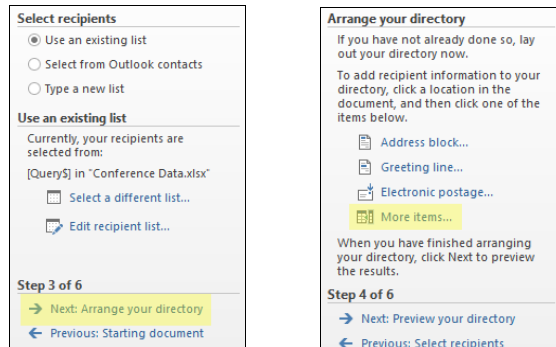
- In the Select Table leave it at the default **Query\$** and select OK
- When the Mail Merge Recipients Appears, select OK



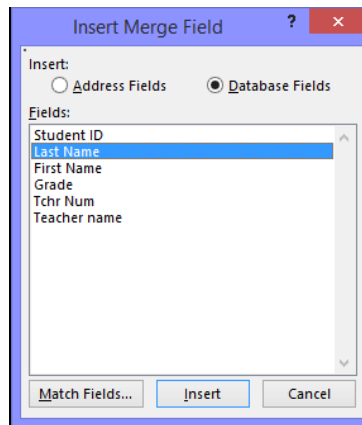
Create your document such as headings, page numbers, etc.



- Place the cursor in the area where the merged data will print, for example, student name
- Select **Arrange your Directory**
- Click the mouse on **More Items** on the right side of the form

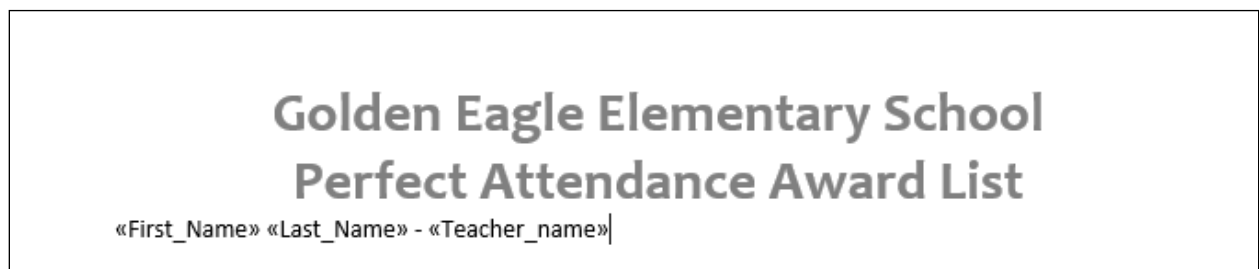


- From the **Insert Merge Field** box select the field to be inserted then click **Insert**



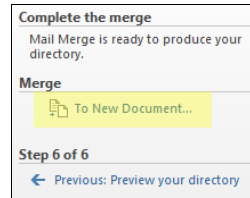
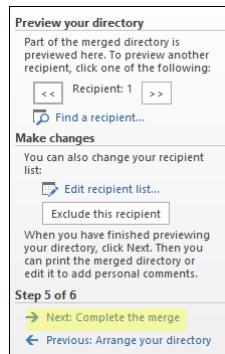
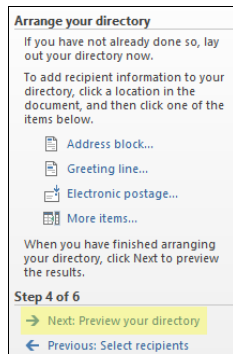
Return to the document, place the cursor in the area where the merged data will print and perform the same steps again until all fields are located properly on the document

- The **Fields** selected will display on the document from the file created. Insert any spaces or special characters. Drop down a line.



- From the right side of the screen select **Preview your directory**
- Click on **Complete the Merge**

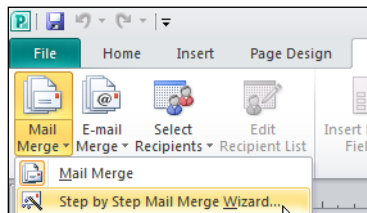
- Click on **To New Document** and **Merge to New Document**
- The list will be created and any adjustments can be made prior to printing



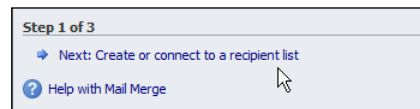
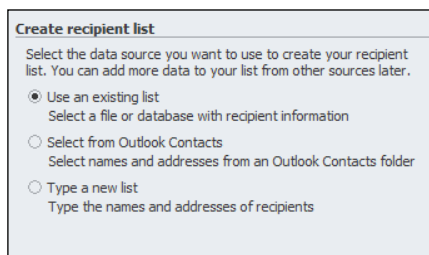
Publisher 2016, 2013 and 2010 – Easy Mail Merge for Decorative Labels

This procedure is used to create Decorative Address Labels using a file created in Aeries with Labels in Publisher. An example is to add the school Logo to the address label.

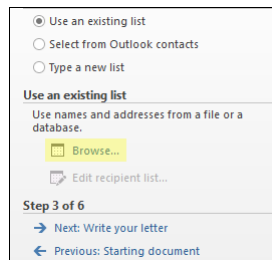
- From **File** select **New | Blank Document**.
- Choose **Page Design | Change Template**
- Select **All Mailing and Shipping**
- Select a **Mailing Address Label** to be generated
- From the **Mailings** tab select **Step by Step Mail Merge Wizard**



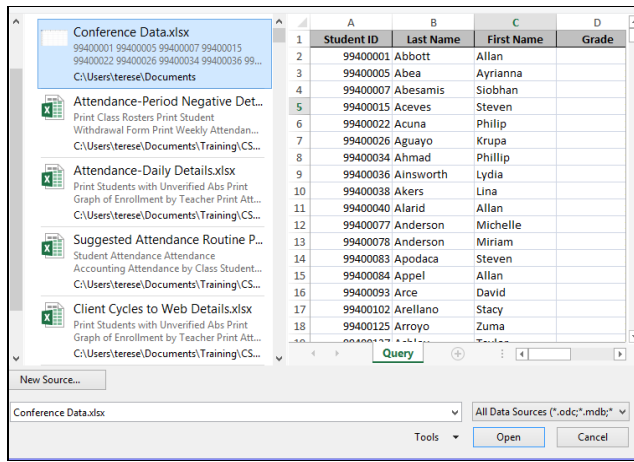
- Select **Use an Existing List**
- At the bottom for Step 1 select **Next: Create or connect to a recipient list**



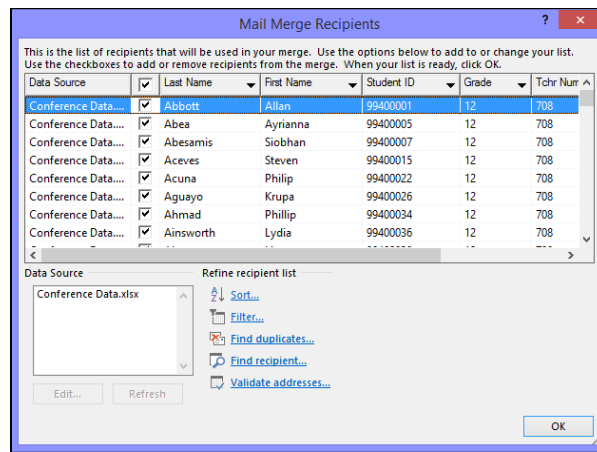
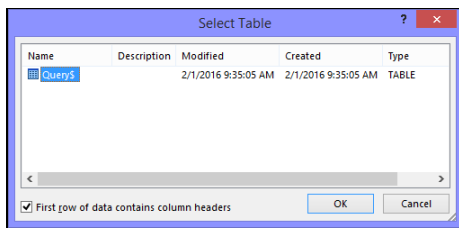
- From the right side of the screen select **Browse**



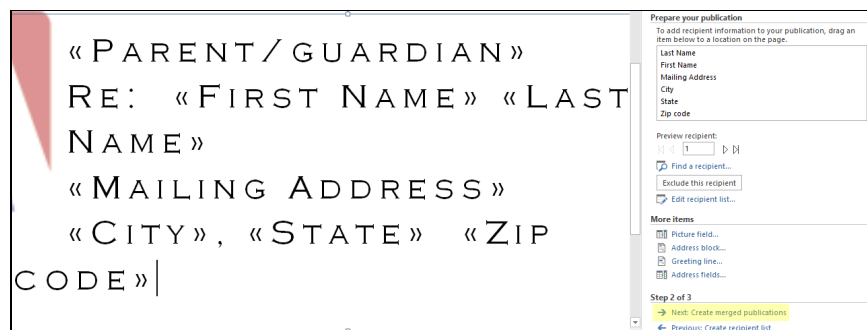
- In the **Select Data Source** Window change the **Look In to C:\Eagle**
- Select the file created in Aeries Query then click **Open** (or double click the filename)



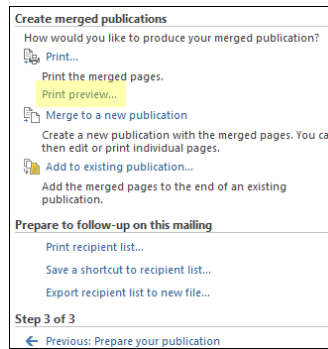
- In the Select Table leave it at the default **Query\$** and select OK
- When the Mail Merge Recipients Appears, select OK



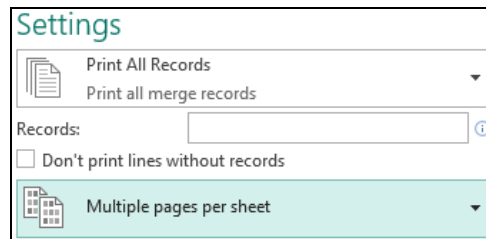
- Return to the labels, clear out the text box and place the cursor where the merged data will print
- Select the fields on the right side of the screen. Use **Enter** key to drop down to the next line
- Perform same steps until all fields are located properly and formatted
- The **Fields** selected will display on the document from the file created
- Add any formatting – for example a **Comma** between City and State etc



- Select to **Create Merge Publication**
- Select **Prepare your publication**



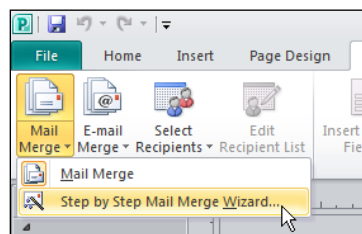
- Verify your publication is correct
- Either select to **Print preview** or **Print**
- Change the *Multiple copies per sheet* to **Multiple pages per sheet**



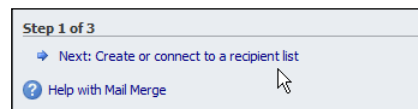
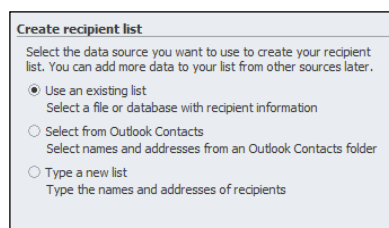
- ALWAYS print one sheet of labels out on plain white paper and verify the labels are setup correctly.

This procedure is used to create shipping labels to be used as Emergency Bag Labels. The query generated is sorted by the teacher

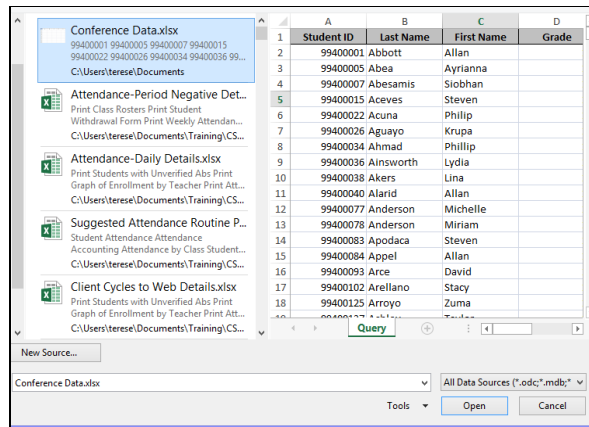
- From **File** select **New | Blank Document**.
- Choose **Page Design | Change Template**
- Select **All Mailing and Shipping**
- Select a **Mailing Address Label** to be generated (Avery5164)
- From the **Mailings** tab select **Step by Step Mail Merge Wizard**



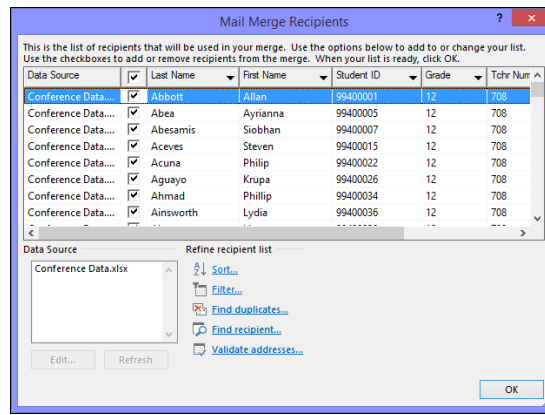
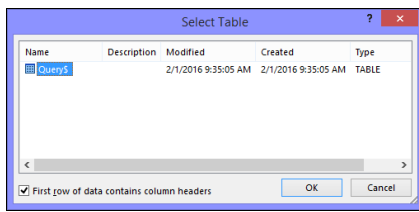
- Select **Use an Existing List**
- At the bottom for Step 1 select **Next: Create or connect to a recipient list**



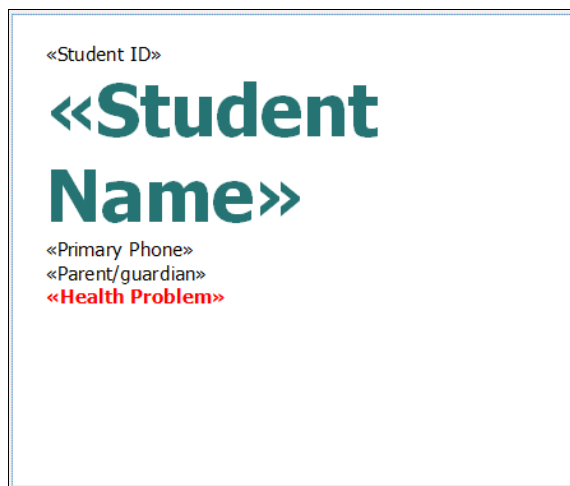
- In the **Select Data Source** Window change the **Look In** to **C:\Eagle**
- Select the file created in Aeries Query then click **Open** (or double click the filename)



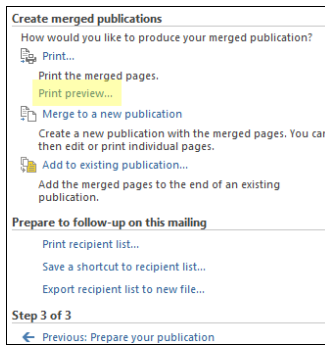
- In the Select Table leave it at the default **Query\$** and select OK
- When the Mail Merge Recipients Appears, select OK



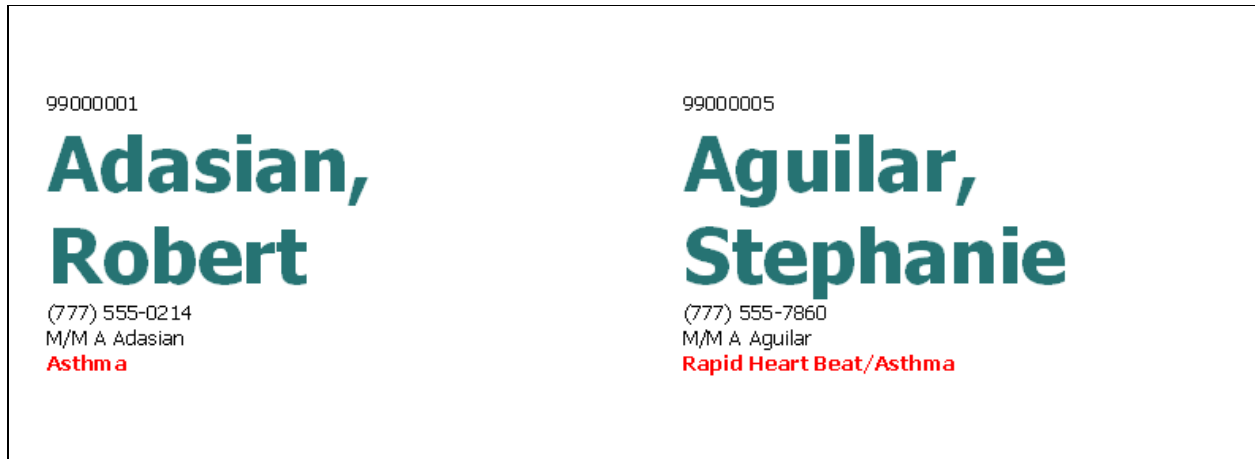
- Return to the labels, clear out the text box and place the cursor where the merged data will print
- Select the fields on the right side of the screen. Use **Enter** key to drop down to the next line
- Perform same steps until all fields are located properly and formatted
- The **Fields** selected will display on the document from the file created
- Add any formatting – for example field names such as **Health Problems** below



- Select to **Create Merge Publication**
- Select **Prepare your publication**



- Verify your publication is correct
- Either select to **Print preview** or **Print**



Change the *Multiple copies per sheet* to **Multiple pages per sheet**

