

YLS CLERKSHIP MAIL MERGE TEMPLATES

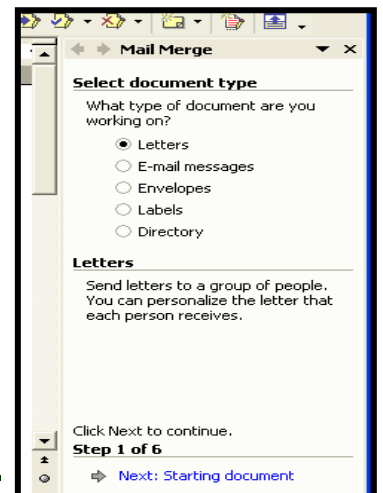
Word templates have been created for YLS applicant and recommenders to use for the clerkship merge process. The templates contain the merge codes needed to complete the merge process. The mail merge Wizard will allow you to delete or add codes as you would like.

DOWNLOAD AND SAVE THE TEMPLATES

1. Go to www.law.yale.edu/cdo.
2. Choose Resources, then Clerkship Information in the left sidebar menu.
3. Right-click on the link of the template you wish to use and choose "Save Target As" and choose where to save the template.
4. Repeat until you have saved all of the templates you will want to use.

USING THE DOCUMENT TEMPLATES IN WORD 2007 OR XP

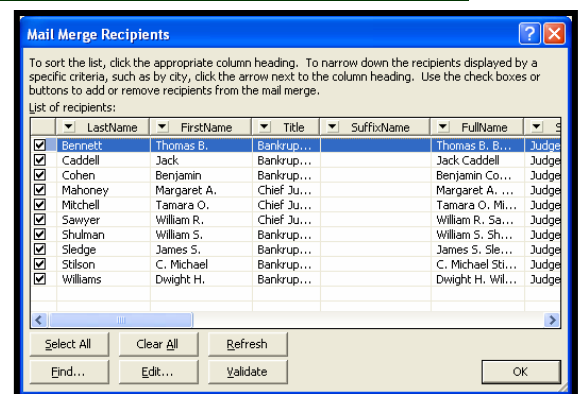
- Open the Document Template that you just saved.
- In Word XP, choose **Tools, Letter and Mailings, Mail Merge...** to display the Mail Merge Task Pane.
- In Word 2007, select the **Mailings** tab, click on **Start Mail Merge**, and select **Step by Step Mail Merge Wizard**.
- The **Mail Merge Wizard** appears in the task pane on the right of your window. Follow the 6 steps to complete the merge:



Step 1, choose the **Letters** as the type of document you want to create. Click **Next** at the bottom of the task pane.

Step 2, select **Use the current document** as your starting document, and click **Next** at the bottom of the task pane.

Step 3, choose **Use an Existing List** under "Select Recipients" Here you will want to choose the Judges data source file from the CDO Clerkship database, which is a .txt file. Click **Browse** and select the Judges data source file.



The **Mail Merge Recipients** dialog box appears and shows the list of the Judges. Make sure they are all selected. Click **OK**. The **Judges source data file** from the student is now associated with your letter. Click **Next** at the bottom of the task pane.

Step 4, create the form letter that you want to send. The template already contains an address block with the appropriate fields from the data source. To add fields in other parts of the document:

1. Click where you want to insert the field.
 2. On the task pane to the right you will see 5 different options for inserting fields into your form file. Click on the **More items** option. This will allow you to insert the correct merge fields for the clerkship process.
 3. To select fields from your data source, choose to **Insert: Database Fields**.
 4. In the **Fields** box, click the field you want.
 5. Click **Insert**.
 6. Repeat until you have entered all of the fields you want at that point in your document and then click **Close**.
 7. Type the rest of your letter.
 8. Save the main document.
 9. Click **Next** at the bottom of the task pane. This step performs the mail merge and created the merged document.
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Step 5, now you have your merged document. **Preview your letters** to make changes to individual letters. If you need to make changes to the main document (step 4), click **Previous** on the bottom of the task pane. Remember to save after making any changes to the main document. To perform the mail merge, click **Next**.

Step 6, To view and print individual letters, click on **Edit individual letters**. Once you have made all of the edits to the merged document, save the merged document and then print the letters.

- Be sure to save any changes to the main document before you close out of the files.

NOTE FOR FEDERAL AND STATE SUPREME COURTS

You will need to modify the template address block to delete "for the <<Court_Specific.>>." Because supreme courts do not have circuit numbers or district names, the address block will have an odd blank unless you delete that phrase. If you are doing a mixture of courts (e.g., circuit and state supreme), you should delete it in the final individual letters as appropriate. If you are doing exclusively supreme courts, you can delete it in the master document.

USING THE LABELS TEMPLATE IN WORD 2007 OR XP

- Open the Label Template in Word. (*Note: the template is set up for Avery 5163 – Shipping labels.*)
- In Word XP, choose **Tools, Letter and Mailings, Mail Merge...** to display the Mail Merge Task Pane.
- In Word 2007, select the **Mailings** tab, click on **Start Mail Merge**, and select **Step by Step Mail Merge Wizard**.
- The **Mail Merge Wizard** appears in the **task pane** on the right of your window. The **Wizard** starts at Step 3. Follow steps below to complete the merge:

Step 3, choose **Use an Existing List** under “Select Recipients. Click **Browse** and find the Judges data source file.

Here you will want to choose the Judges data from the CDO Clerkship database, which is a .txt file. Choose **Use an Existing List**, then click on **Browse** and select the Judges data source file.

The **Mail Merge Recipients** dialog box appears and shows the list of the Judges. Make sure they are all selected. Click **OK**. The **Judges data source file** you downloaded is now associated with your labels. Click **Next** at the bottom of the task pane.

Step 4, the template already contains an address block with the appropriate fields from the data source. To add fields in other parts of the document:

1. Click where you want to insert the field.
2. On the task pane to the right you will see 5 different options for inserting fields into your form file. Click on the **More items** option. This will allow you to insert the correct merge fields for the clerkship process.
3. To select fields from your data source, choose to **Insert: Database Fields**.
4. In the **Fields** box, click the field you want.
5. Click **Insert**.
6. Repeat until you have entered all of the fields into your document and then click **Close**.
7. Add the student’s name after “**Clerkship Recommendation For:**” in the first label and then click **Update All Labels** on the task pane. This will update each label with the name. *Please note that the judges specifically asked all recommenders to include the applicant's name on the front of the envelope.*
8. Save the label.
9. Click **Next** at the bottom of the task pane. This step performs the mail merge and created the merged labels.

Step 5, Now you have your merged labels. **Preview your labels to make changes to the individual letters.** If you need to make changes to the main label document (Step 4), click **Previous** on the bottom of the task pane. Remember to save after making any changes to the main label. To perform the label merge, click **Next**.

Step 6, To view and edit individual labels, click on **Edit individual labels**.

- Once you have made all of the edits to the merged labels, save the merged label document and then print the letters.
- Be sure to save any changes to the main label before you close out of the files.

USING THE ENVELOPE TEMPLATE IN WORD 2007 OR XP

- Open the Envelope Template in Word.
- In Word XP, choose **Tools, Letter and Mailings, Mail Merge...** to display the Mail Merge Task Pane.
- In Word 2007, select the **Mailings** tab, click on **Start Mail Merge**, and select **Step by Step Mail Merge Wizard**.
- The **Mail Merge Wizard** appears in the **task pane** on the right of your window. Follow the 6 steps to complete the merge:

Step 1, choose the **Letters** as the type of document you want to create (*Even though you are working with an envelope*). Click **Next** at the bottom of the task pane.

Step 2, select **Use the current document** as your starting document, and click **Next** at the bottom of the task pane.

Step 3, choose **Use an Existing List** under “Select Recipients. Click **Browse** and find the Judges data source file.

Here you will want to choose the Judges data from the CDO Clerkship database, which is a .txt file.. Choose **Use an Existing List**, then click on **Browse** and select the Judges data source file.

The **Mail Merge Recipients** dialog box appears and shows the list of the Judges. Make sure they are all selected. Click **OK**. The **Judges data source file** you downloaded is now associated with your envelope. Click **Next** at the bottom of the task pane.

Step 4, the template already contains an address block with the appropriate fields from the data source. To add fields in other parts of the envelope:

1. Click where you want to insert the field.

2. On the task pane to the right you will see 5 different options for inserting fields into your form file. Click on the **More items** option. This will allow you to insert the correct merge fields for the clerkship process.
3. To select fields from your data source, choose to **Insert: Database Fields**.
4. In the **Fields** box, click the field you want.
5. Click **Insert**.
6. Repeat until you have entered all of the fields into your envelope and then click **Close**.
7. Add the student's name after "**Clerkship Recommendation For:**". *Please note that the judges specifically asked all recommenders to include the applicant's name on the front of the envelope.*
8. Save the envelope.
9. Click **Next** at the bottom of the task pane. This step performs the mail merge and created the merged envelopes.

Step 5, Now you have your form envelope. **Preview your envelopes to make changes to the individual letters.** If you need to make changes to the main label document (Step 4), click **Previous** on the bottom of the task pane. Remember to save after making any changes to the main label. To perform the label merge, click **Next**.

Step 6, To view and edit individual labels, click on **Edit individual labels**.

- Once you have made all of the edits to the merged envelopes, save the merged envelope document and then print the envelopes.
- Be sure to save any changes to the main envelope before you close out of the files.