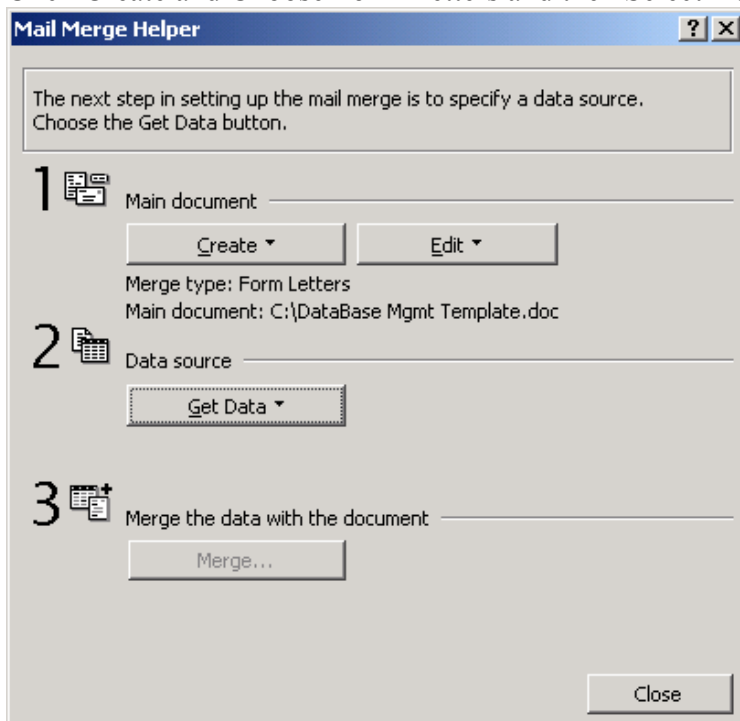# Database Management
Mail Merge Procedure

The Database Management API uses a text file to import Cardholder data into the WinDSX system. This text file must be formatted to the DSX Markup Language (DML) specifications. Some Human Resource programs have the ability to automatically export Cardholder data to a text file with the proper format. For systems that do not have this ability or if you just need to import your data from a spreadsheet, DSX provides the files and documentation to manually import the data.
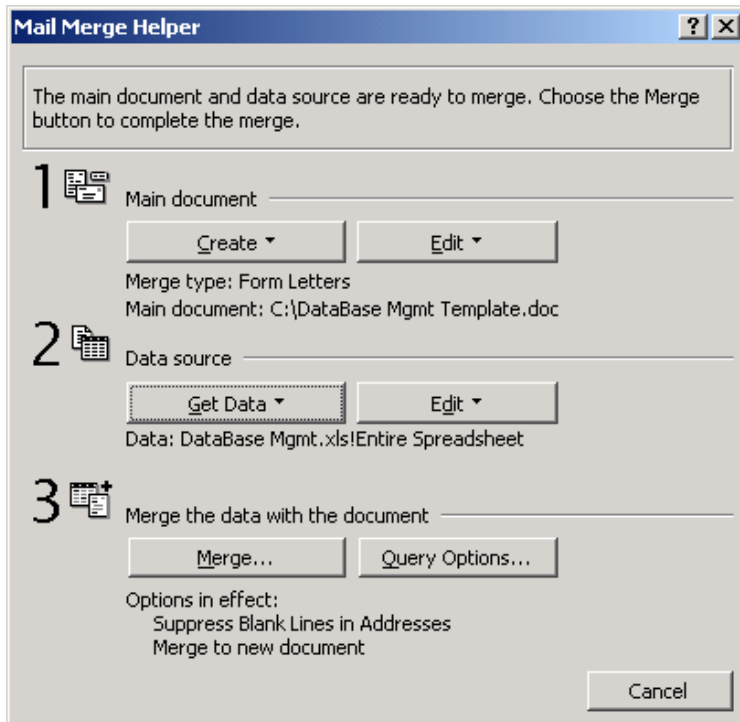
In the Docs folder on the WinDSX CD are two files, an Excel Spreadsheet and a Microsoft Word Document that will be used to import the data into WinDSX. Save the data to be imported into the Database Mgmt Excel spreadsheet. The Database Mgmt Word document will be used to create the ^imp## text file. Follow the instruction below to Mail Merge these two files to create the text file.
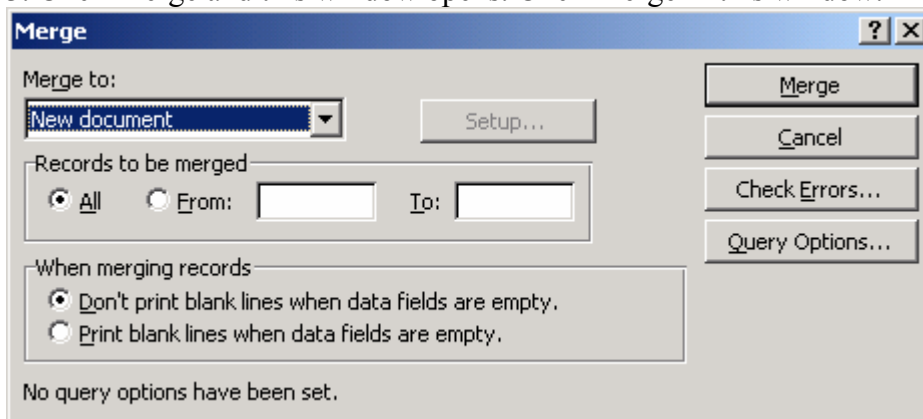
Microsoft Word 2000 ™

1. Open the Database Mgmt Template .doc and click on Tools and then Mail Merge. Click Create and Choose Form Letters and then Select Active Window.
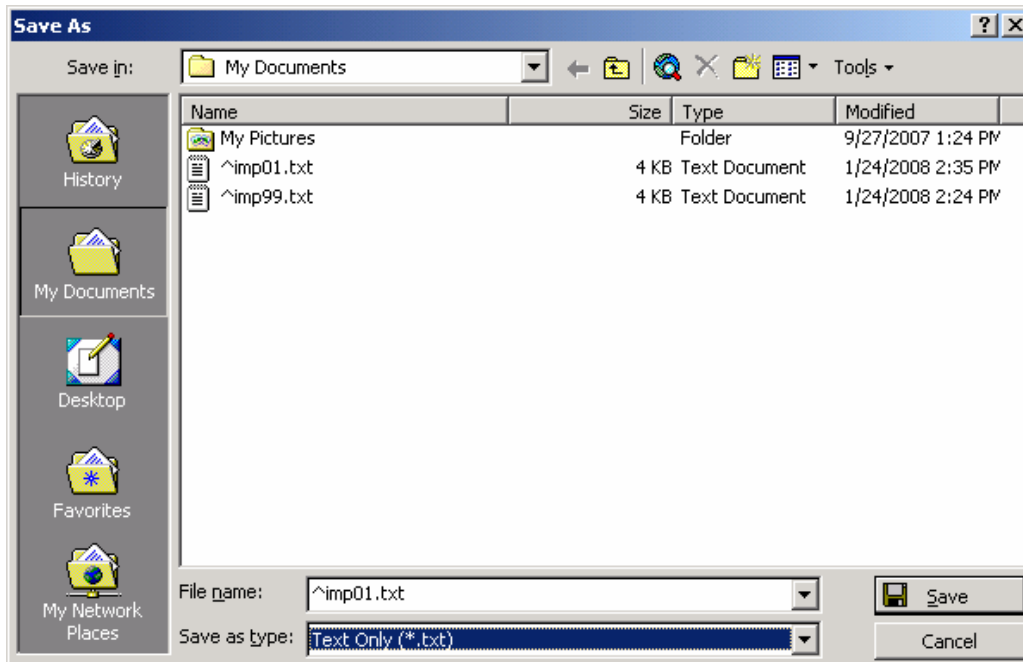

2. Click Get Data and then select Open Data Source and select the Database Mgmt Excel Spreadsheet that contains the records to be imported. Select Entire Spreadsheet when prompted.
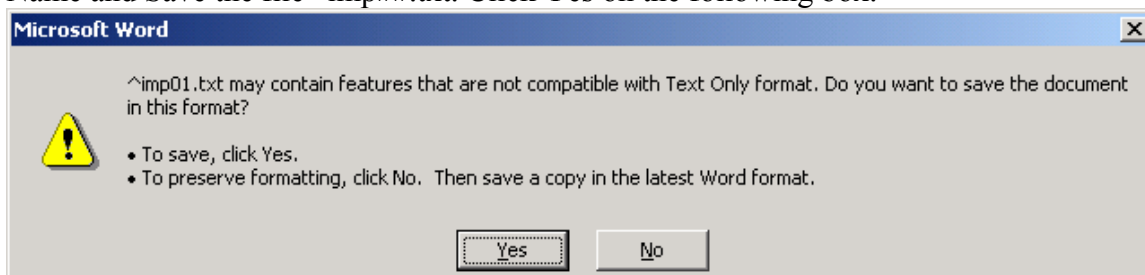
3. Click Merge and this window opens. Click Merge in this window.

This will create a new .doc named Form Letters1. Click File\Save As and select Text Only as the file type.

Name and Save the file ^imp##.txt. Click Yes on the following box.

Copy the saved file to the WinDSX shared database folder. The WinDSX system will automatically import the data and delete the file.
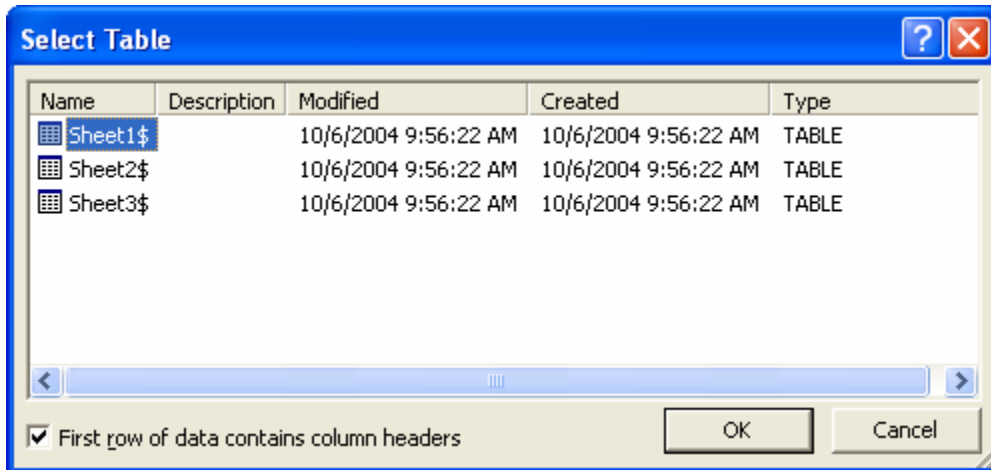
Microsoft Word ™ 2002 and 2003
Open the Database Mgmt Word document and select Tools then Letters and Mailings\
Mail Merge Wizard.
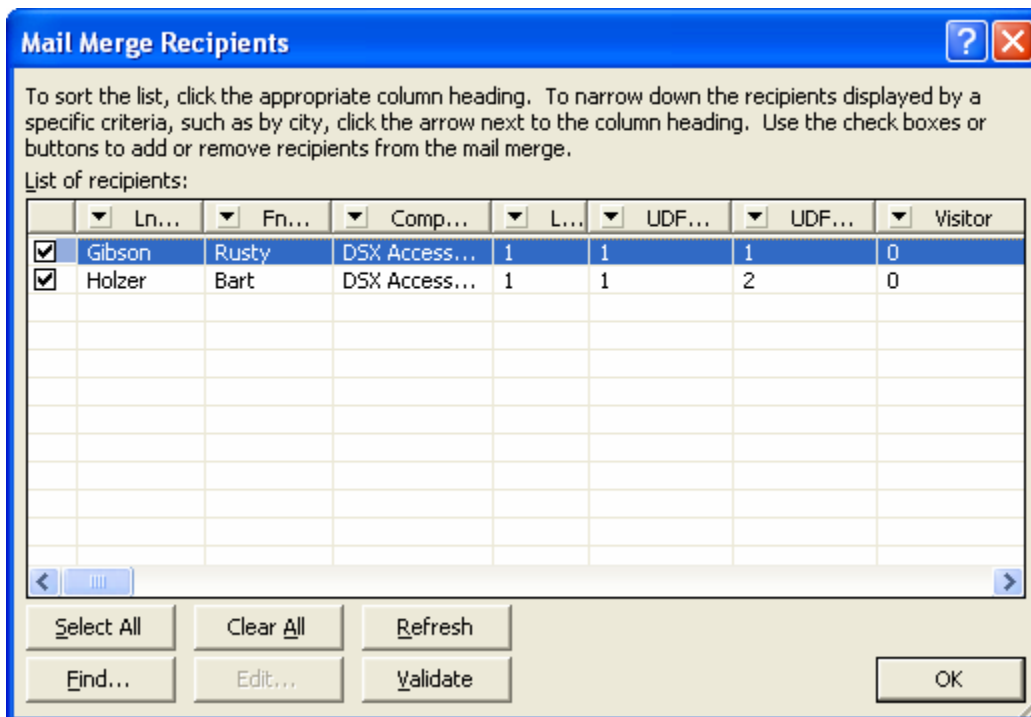Step 1 - Select Document Type – Choose Letters. Click Next.
Step 2 - Select Starting Document – Choose Use Current Document. Click Next.
Step 3 - Select Recipients – Choose Use an Existing List. Click Next. This opens the Select Data Source window. Select the Database Mgmt Excel spreadsheet that contains the records to be imported and click Open. This opens the Select Table window. Click OK.

This opens the Mail Merge Recipients window. Click Select All then OK. Click Next.
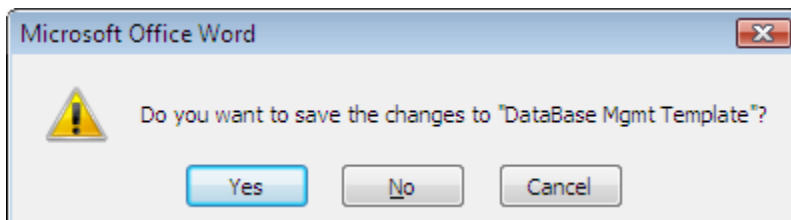

Step 4 – Write Your Letter. Click Next.
Step 5 – Preview Your Letters. Click Next
Step 6 – Complete the Merge. Click Edit Individual Letters. This opens the Merge to New Document window. Choose All then click OK. This will open the merged letter. Click File\ Save As and choose Plain Text (*.txt) as the file type and name the file ^imp##.txt. Click OK on File Conversion window.

File Conversion - ^imp01.txt

Warning: Saving as a text file will cause all formatting, pictures, and objects in your file to be lost.

Text encoding:
- ● Windows (Default)   ○ MS-DOS   ○ Other encoding:
  - US-ASCII
  - Vietnamese (Windows)
  - Western European (DOS)
  - Western European (ISO)
  - Western European (Mac)
  - **Western European (Windows)**

Options:
- ☐ Insert line breaks
- End lines with: CR / LF ▼
- ☐ Allow character substitution

Preview:
```
I L1 U1 ^1^^^
T Names
F FName ^Rusty^^^
F LName ^Gibson^^^
F Company ^DSX Access Systems, Inc.^^^
F Visitor ^0^^^
F Trace ^0^^^
F Notes ^Ops/General Manager^^^
W
```

OK   Cancel

Close all open windows. Do not save changes to the Database Mgt Template doc.

Microsoft Office Word

⚠ Do you want to save the changes to "DataBase Mgmt Template"?

Yes   No   Cancel

Copy the saved file to the WinDSX shared database folder. The WinDSX system will automatically import the data and delete the file.

The Excel spreadsheet and the Word document contain many fields that will allow the import of a large amount of data for each Cardholder. The more information you import per Cardholder the longer the import process will take. With several thousand users to import this could add a considerable amount of time to the import process. The source files can be made smaller by deleting fields that will not be used during the import, thus making the import process faster.

For example, there are 25 UDF fields included in the source files. If you do not have 25 UDF's to import, the extra UDF fields can be deleted from the Excel spreadsheet and the Word document. Delete any unused data fields from both files. Remember to keep at least one UDF field that will be the unique ID (UID) UDF Key for the Cardholder record.