

Importing  
For use with Merges

# Importing

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Importing, as it is called, almost anything into Excel is not as difficult as it once was. Assuming the information you are importing is formatted (prepared) for a spreadsheet program, it's as easy as clicking on the file menu, choosing Open, and answering a couple questions on an import wizard.

### ***Why import anything into Excel?***

If you do merges in Word using Excel, importing your list information into Excel eliminates the need to create your list from scratch (see the *Creating a List* paper), especially if you have a database with all that information in it anyway.

And because we're going to be covering importing, this paper assumes you have a database you use (MS Access, Act!, or some other database program) where the information you need for your merge is stored.

### ***Preparing information for Excel...***

Let's say you have a database with all your names and addresses in it. And you're thinking, "hey, I could send those letters to these people if I could just do a merge.!"

The unfortunate reality, however, is that your database doesn't talk with Microsoft Word (or any other word processing software, for that matter). So how can you get the information out of your database and into a format that allows you to do a merge in Word?

That's where Excel comes in.

Almost all databases allow you to export information. If you are unfamiliar with how to do this with your database, go to its help file and search for the keyword "export." It should have something about it there.

But before you export your information, you'll need to decide (hopefully, you'll be given the choice) how you are going to export it.

### ***Format of Export File...***

Okay, so you've determined that you can get your information out of your database program. Now what?

At some point during the process of exporting, you should have the chance to indicate what format you want to export your information in. One option may be *tab delimited*. This is where the database software places a *tab character* (which you would not be able to visibly notice) between each field of information (a field is like first name, last name, city and so on).

Another option you may have is *comma delimited*. Here the database software separates each field with a comma.

Which one of these options you use won't matter when importing it into Excel. Sometimes I use tab delimited formats, sometimes I use comma delimited. Choose one and export your information.

Depending on the amount of information you are exporting, this process may take a while (seconds to minutes).

**Note...**

This paper will focus on importing files that are delimited with either tabs or commas and not *Fixed Width* formats. Importing Fixed Width formats are much more complicated (and time intensive). If you have to import Fixed Width formatted files, see Excel's help for some more information on this.

At some point during the export process, you gave the export file a file name and chose a location on your computer (or a network drive) where the file is to be stored. Remember this location!

Go ahead and start Excel.

Click on the File menu and choose Open.

Navigate to the drive and folder where you placed the export file from your database program. If you can't "see" your file (from the Open dialog box), make sure you have changed the File of Type dropdown listbox to include All Files and not just Excel Files.

Highlight your file and click on the Open button.

You should see a dialog box similar to Figure 1. This is the import wizard, step one of three.

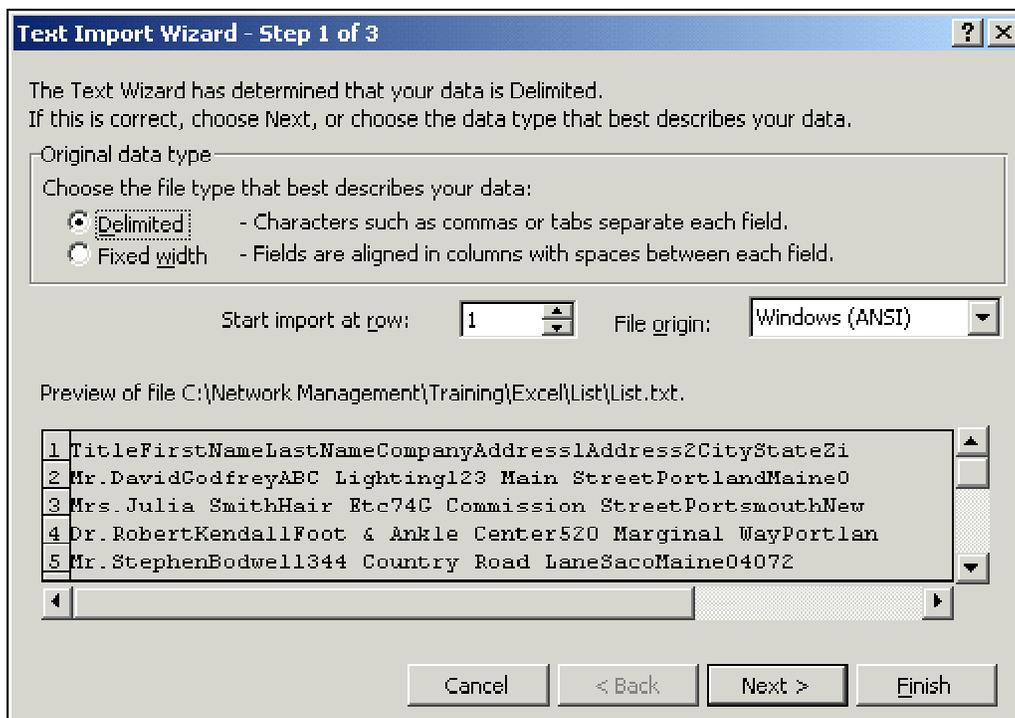


Figure 1

Because we are dealing with a delimited file format, ensure that the Delimited radial button is selected and click on the Next button.

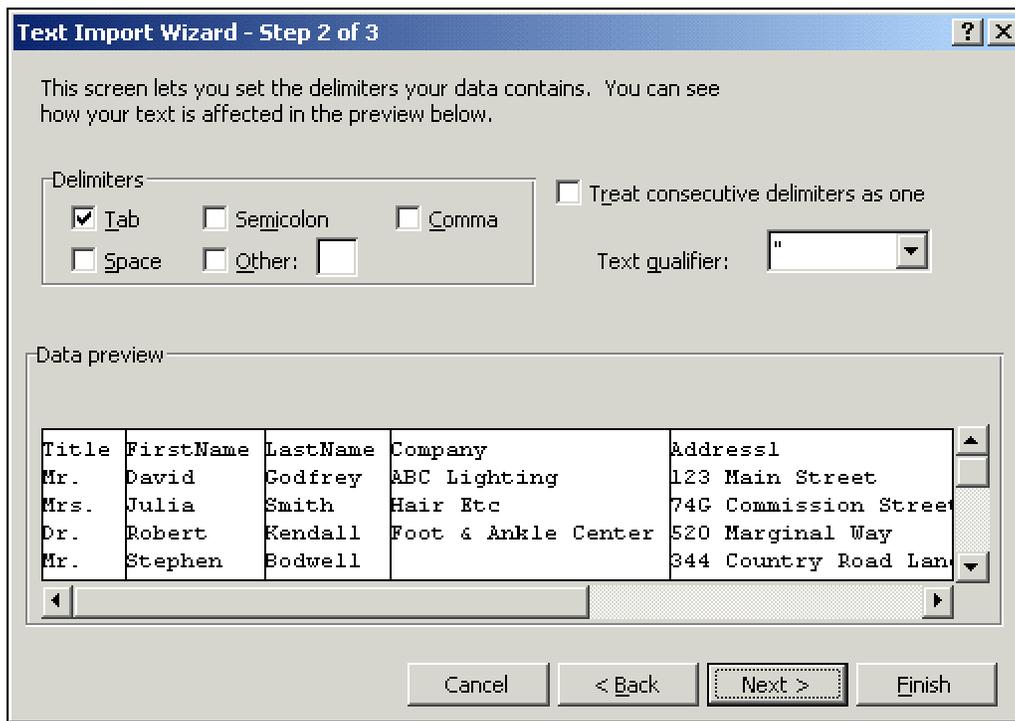


Figure 2

**Note...**

In the Data Preview area of the import wizard, you may or may not have (depending on your database software) a header row identifying each column of data. In the example above, you can see that mine does have it (Title, FirstName, etc.).

On the Step 2 screen (above), you need to click the checkbox for the format that your file is in. If it's tab, select Tab and make sure all other checkboxes are cleared. For comma delimited files, select Comma and so forth.

When you are ready, click the Next button and on to Step 3.

Probably the most important thing to remember when importing names and addresses in Excel is to change the zip code column to Text format.

On Step 3 of the wizard (Figure 3, next page), you will have a chance to change formats (not the format of the file, but of the individual columns within the file). All data coming into Excel will have a "general" format applied to them. This is fine if most of the data coming in are text (like names, cities, etc.).

You need to remember to do this for all columns that contain numbers that start with zeros. Zip codes for the northern United States start with zeros. If you don't change the format to text for this column, all your zip codes will be wrong (and any mail merges you do will be wrong)!

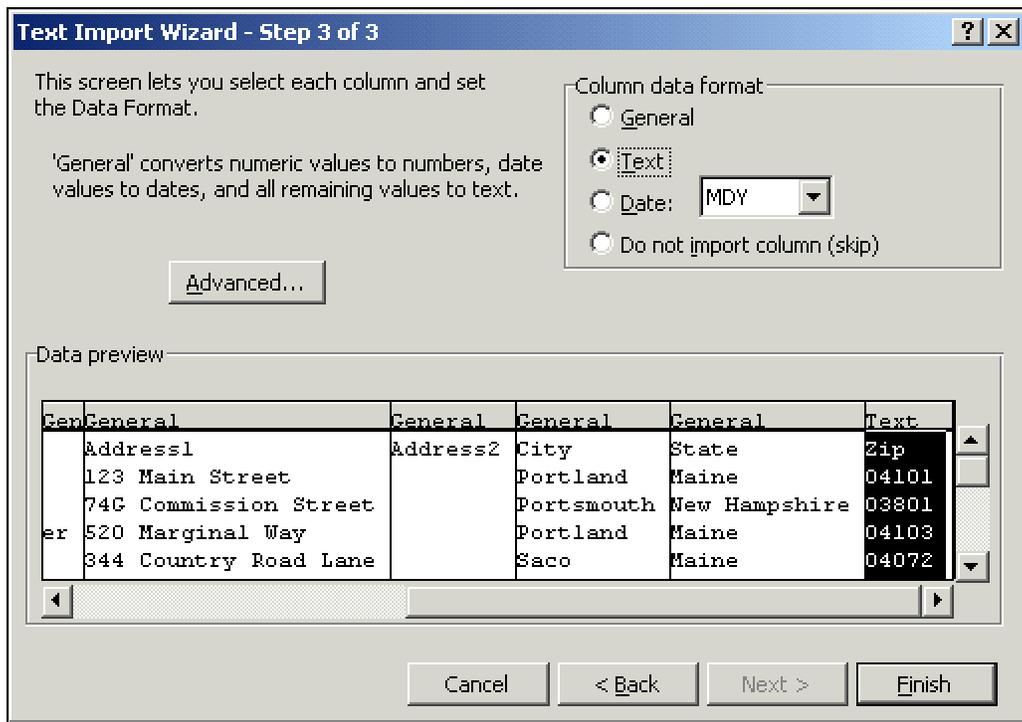


Figure 3

To change the format of a particular column, click on the column heading to select that column. In our example, click on the word “General,” then click on the “Text” radial button under Column Data Format (the General label will change to Text).

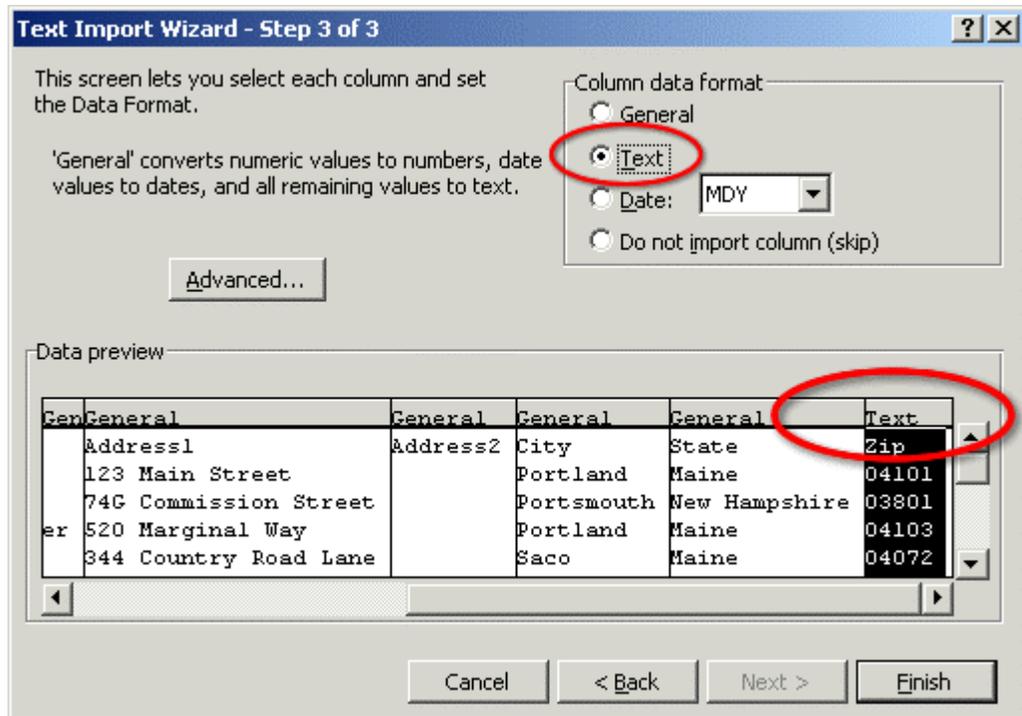


Figure 4

After you have changed all the necessary columns to Text, click on the Finish button to bring the file into Excel.

That's it! That's all there is to importing a file into Excel.

There are variations on how you can import a file, most of these can be found in step two of the wizard. Overall, however, importing a file into Excel is rather simple with few bumps along the way.

### *Summary...*

Once the file is in Excel, you may want to adjust the column widths to view all your data. If you're going to be using this data as a merge with Word, leave the header labels in (FirstName, City, State, etc.). If your data doesn't have header labels, place them in it (it makes merges a lot simpler).

Lastly, do a Save As from the File menu and save the file in Excel's workbook format, giving the file a unique name.

At this point, you're now ready to set up your merge document(s).

Good luck!

