



Colorado State University

Talent Management System (TMS)

How to Create a Mail Merge



Creating a Mail Merge from an Applicant Spreadsheet

The following training guide will show you how to create a 'Mail Merge' from an exported applicant spreadsheet. Mail Merge, offered in Office products, allows personalized mass emails that can be sent from a single Excel document. This function creates a seemingly personified email to be sent out using fixed text that will include a personal greeting using the applicant's name. This feature is very useful when sending out multiple rejection emails to unsuccessful applicants who expect to be notified if they didn't receive the job.



Creating an Applicant Spreadsheet

The screenshot shows the Applicant Tracking System interface. A dark blue sidebar on the left contains navigation options: 'Applicant Tracking System' (highlighted with a red box and three dots), 'Position Management', and 'OTHER TOOLS' including 'Colorado State University Employee Portal'. The top navigation bar includes 'Welcome, Test User', 'My Profile', 'Help', and 'logout'. A red callout box with the number '1' points to the three dots in the top-left corner, with the text: '1. Select the Applicant Tracking module by clicking the three dots in the top-left corner of the screen.' Another red callout box with the number '2' points to a 'User Group' dropdown menu in the top right, which is currently set to 'Applicant Manager'. The text in this callout is: '2. Select Initiator from the User Group drop-down menu.' The main content area is titled 'Online Recruitment System' and features a navigation bar with 'Postings 3', 'Hiring Proposals', 'Position Requests 3', and 'Onboarding Tasks'. Below this is a search bar and a 'Filters' button. A table displays recruitment data with columns for 'CURRENT STATE' and 'DAYS IN CURRENT STATE'. The table has three rows, all with 'Initiator' as the current state. A right-hand panel shows '0 Active Applicants' with a large '0' and a legend for 'Evaluated Applicants' (blue) and 'Unevaluated Applicants' (purple). At the bottom right, a card indicates '14 Committees Served By Department last 365 Days' with a partial pie chart.

Applicant Tracking System

Welcome, Test User [My Profile](#) [Help](#) [logout](#)

User Group:
Applicant Manager

Shortcuts

Applicant Tracking System

Position Management

OTHER TOOLS

Colorado State University
Employee Portal

Online Recruitment System

Postings 3 Hiring Proposals Position Requests 3 Onboarding Tasks

Filters

	CURRENT STATE	DAYS IN CURRENT STATE
OSTDOCTORAL FELLOWSHIP	Initiator	1868
	Initiator	1835
essor	Initiator	864

0 Active Applicants

0

Evaluated Applicants
Unevaluated Applicants


14 Committees Served By
Department last 365 Days



Creating an Applicant Spreadsheet

Applicant Tracking System

Welcome, Test User [My Profile](#) [Help](#) [logout](#)

 User Group: Applicant Manager

Home Postings Shortcuts

Postings / Admin Professional/ Research Professional / Academic Success Coordinator (Closed) / Summary

★ See how Posting looks to Applicant
Print Preview (Applicant View)
Print Preview
Add to Watch List

Posting: Academic Success Coordinator (Admin Professional/ Research Professional)

Current Status: Closed

Position Type: Admin Professional/ Research Professional
Created by: Test User
Owner: OEO

Department: College of Business Training (0000)

1. Navigate to the posting and click on the Applicants tab

Summary History Applicants Reports Associated Position Description

Please review the details of the posting carefully before continuing.

Creating an Applicant Spreadsheet

Posting: Academic Success Coordinator (Admin Professional/ Research Professional)

Current Status: Closed

Position Type: Admin Professional/ Research Professional

Created by: Test User

Owner: OEO

Department: College of TMS

Note: Unless you have a saved search set up, only applicants who are in an 'active' workflow state will appear in the list below when you first navigate to the Applicants tab.

Associated Position Description

Saved Searches Search **More Search Options**

Active Applicants

"Active Applicants" 9 Selected records 0 Clear selection?

	First Name	Last Name	Posting Number	Workflow State (Internal)	Application Date	(Actions)
<input type="checkbox"/>	Pansy	Parkinson	201900228AP	Under Review by Dept/Committee	March 14, 2019 at 02:56 PM	Actions
<input type="checkbox"/>	Vincent	Crabbe	201900228AP	Under Review by Dept/Committee	March 14, 2019 at 03:51 PM	Actions
<input type="checkbox"/>	Cho	Chang	201900228AP	Under Review by Dept/Committee	March 14, 2019 at 03:51 PM	Actions
<input type="checkbox"/>	Luna	Lovegood	201900228AP	Under Review by Dept/Committee	March 14, 2019 at 03:53 PM	Actions
<input type="checkbox"/>	Neville	Longbottom	201900228AP	Under Review by Dept/Committee	March 14, 2019 at 03:55 PM	Actions

1. Since you will be creating an applicant spreadsheet containing unsuccessful ('Inactive') applicant information, you will need to export the data for 'Inactive' applicants. To view inactive applicants and to add an email column, select the 'More Search Options' button.

Note: If there are applicants in an active 'Hold' workflow state that you wish to contact as well, you will need to export a list containing their information too.



Creating an Applicant Spreadsheet

Posting: Academic Success Coordinator (Admin Professional/ Research Professional)

Current Status: Closed

Position Type: Admin Professional/ Research Professional

Department: College of TMS Training (0000)

Created by: Test User

Owner: OEO

Summary | History | Applicants | Reports | Associated Position Description

The screenshot shows the 'Applicants' tab of a job posting. At the top, there are tabs for 'Summary', 'History', 'Applicants', 'Reports', and 'Associated Position Description'. Below the tabs is a search bar with a 'Search' button and a 'Hide Search Options' dropdown. A red box highlights the 'Search' button. Below the search bar is a 'More Search Options' menu with the following fields: 'Add Column' (dropdown), 'Active/Inactive' (radio buttons), 'Workflow State' (radio buttons), 'First Name' (dropdown), and 'Last Name' (dropdown). A red box highlights the 'Inactive' radio button in the 'Active/Inactive' field. A red callout box with white text points to the 'Inactive' radio button and the 'Search' button. The callout text reads: '1. From the expanded More Search Options menu, deselect Active and select Inactive from the Active/Inactive field, then click Search.' Below the search options is a 'Active Applicants' button with a close icon. At the bottom, there is a status bar showing '"Active Applicants" 9 Selected records 0 Clear selection?' and an 'Actions' dropdown menu.

1. From the expanded More Search Options menu, deselect Active and select Inactive from the Active/Inactive field, then click Search.



Creating an Applicant Spreadsheet

Summary | History | Applicants | Reports | Associated Position Description

1. To add the email column, select Email from the Add Column drop-down menu then click search.

Search [] [Search] [Hide Search Options]

Ad hoc Search [X]

Ad hoc Search 11 Save this search? [Se]

Actions [v]

(Actions)

First Name	Last Name	Employment ID	Status	Date	Actions
Gregory	Goyle	201900228AP	Determined Did Not Meet Min Quals	March 14, 2019 at 03:02 PM	Actions [v]
		201900228AP	Determined Did Not Meet Min Quals	March 14, 2019 at 03:11 PM	Actions [v]
		201900228AP	Determined Did Not Meet Min Quals	March 14, 2019 at 03:08 PM	Actions [v]
Seamus	Finnigan	201900228AP	Application Reviewed, Not Selected	March 14, 2019 at 03:18 PM	Actions [v]

Note: After you click Search, only those in inactive workflow states will show up in the list below.

Drop-down menu items: Add Column, Assessment Criterion - Unique Rank, Background Check Status, City, Combined Document, Contact Email, Contact Phone, Country, Document Conversion Status, Documents, Draft Application?, Duties, **Email**, Employer Address, Employer City, Employer Contact Phone, Employer Country, Employer Name, Employer State, Employer Website Address, Employment End Date



Creating an Applicant Spreadsheet

Ad hoc Search ×

Ad hoc Search 11 Save this search? Selected records 0

1. To export the applicant names and email addresses to an Excel spreadsheet, hover over the orange Actions button and select Export results from the drop-down menu.

	First Name	Last Name	Posting Number	Workflow State (Internal)	Application Date	Email	
<input type="checkbox"/>	Gregory	Goyle	201900228AP	Determined Did Not Meet Min Quals	March 14, 2019 at 03:02 PM	ggoyle	Actions ▾
<input type="checkbox"/>	Colin	Creevey	201900228AP	Determined Did Not Meet Min Quals	March 14, 2019 at 03:11 PM	ccreeve	Actions ▾
<input type="checkbox"/>	Hannah	Abbott	201900228AP	Determined Did Not Meet Min Quals	March 14, 2019 at 03:08 PM	habbot	Actions ▾
<input type="checkbox"/>	Seamus	Finnigan	201900228AP	Application Reviewed, Not Selected	March 14, 2019 at 03:18 PM	sfinnig	Actions ▾
<input type="checkbox"/>	George	Weasley	201900228AP	Application Reviewed, Not Selected	March 14, 2019 at 03:13 PM	gweasl	Actions ▾
<input type="checkbox"/>	Viktor	Krum	201900228AP	Application Reviewed, Not Selected	March 14, 2019 at 03:15 PM	vkrum	Actions ▾
<input type="checkbox"/>	Dean	Thomas	201900228AP	Determined Did Not Meet Min Quals	March 14, 2019 at 03:25 PM	dthomas@gmail.com	Actions ▾
<input type="checkbox"/>	Lavender	Brown	201900228AP	Determined Did Not Meet Min Quals	March 14, 2019 at 03:27 PM	lbrown@gmail.com	Actions ▾
<input type="checkbox"/>	Parvati	Patil	201900228AP	Determined Did Not Meet Min Quals	March 14, 2019 at 03:31 PM	ppatil@gmail.com	Actions ▾
<input type="checkbox"/>	Fleur	Delacour	201900228AP	Application Reviewed, Not Selected	March 14, 2019 at 03:46 PM	fdelacour@gmail.com	Actions ▾
<input type="checkbox"/>	Draco	Malfoy	201900228AP	Application Reviewed, Not Selected	March 14, 2019 at 03:49 PM	dmalfoy@gmail.com	Actions ▾

Actions ▾

- GENERAL
- Review Screening Question Answers
- Download Screening Question Answers
- Export results
- BULK
- Download Applications as PDF
- Create Document PDF per Applicant



Creating an Mail Merge from the Applicant Spreadsheet

AutoSave OFF | job_applications_export_20191205_223245 - Compatibility Mode - Excel | Rogers, Emily

File Home Insert Page Layout Formulas Data Review View Help ACROBAT Tell me what you want to do | Share Comments

Clipboard | Font | Alignment | Number | Styles | Cells | Editing

	A	B	C	D	E	F	G	H	I	J	K
	First Name	Last Name	Posting Number	Workflow State (Internal)	Application Date	Email					
1											
2	Gregory	Goyle	201900228A	Determined Did Not Meet Min Quals	March 14, 2019 at 03:02 PM	ggoyle@gmail.com					
3	Colin	Creevey	201900228A	Determined Did Not Meet Min Quals	March 14, 2019 at 03:11 PM	ccreevey@gmail.com					
4	Hannah	Abbott	201900228A	Determined Did Not Meet Min Quals	March 14, 2019 at 03:08 PM	habbott@gmail.com					
5	Seamus	Finnigan	201900228A	Application Reviewed, Not Selected	March 14, 2019 at 03:18 PM	sfinnigan@gmail.com					
6	George	Weasley	201900228A	Application Reviewed, Not Selected	March 14, 2019 at 03:13 PM	gweasley@gmail.com					
7	Viktor	Krum	201900228A	Application Reviewed, Not Selected	March 14, 2019 at 03:15 PM	vkrum@gmail.com					
8	Dean	Thomas	201900228A	Determined Did Not Meet Min Quals	March 14, 2019 at 03:25 PM	dthomas@gmail.com					
9	Lavender	Brown	201900228A	Determined Did Not Meet Min Quals	March 14, 2019 at 03:27 PM	lbrown@gmail.com					
10	Parvati	Patil	201900228A	Determined Did Not Meet Min Quals	March 14, 2019 at 03:31 PM	ppatil@gmail.com					
11	Fleur	Delacour	201900228A	Application Reviewed, Not Selected	March 14, 2019 at 03:46 PM	fdelacour@gmail.com					
12	Draco	Malfoy	201900228A	Application Reviewed, Not Selected	March 14, 2019 at 03:49 PM	dmalfoy@gmail.com					

Note: You now have an exported applicant spreadsheet with inactive applicant names and email addresses from which you will build your mail merge.

The following pages will demonstrate how to build an Outlook email template that utilizes this spreadsheet.



Editing the Spreadsheet for a Mail Merge

Note: Irrelevant columns will need to be deleted prior to creating the mail merge (Posting Number, Workflow State, and Application Date).

1. To delete entire columns, click on the corresponding letters for each column (i.e. C, D, E). Holding down the shift key will allow you to select multiple columns at once.

2. Once the correct columns are highlighted, right click and select Delete from the drop-down menu.

	A	B	C	D	E	F	G	H	I	J	K
1	First Name	Last Name	Posting Number	Workflow State (Internal)	Application Date	Time	Email				
2	Gregory	Goyle	201900228A	Determined Did Not Meet Min	Quals	M	2 PM	ggoyle@gmail.com			
3	Colin	Creevey	201900228A	Determined Did Not Meet Min	Quals	M	1 PM	ccreevey@gmail.com			
4	Hannah	Abbott	201900228A	Determined Did Not Meet Min	Quals	M	8 PM	habbott@gmail.com			
5	Seamus	Finnigan	201900228A	Application Reviewed, Not	Selected	M	8 PM	sfinnigan@gmail.com			
6	George	Weasley	201900228A	Application Reviewed, Not	Selected	M	3 PM	gweasley@gmail.com			
7	Viktor	Krum	201900228A	Application Reviewed, Not	Selected	M	7 PM	viktor.krum@gmail.com			
8	Dean	Thomas	201900228A	Determined Did Not Meet Min	Quals	M	5 PM	dthomas@gmail.com			
9	Lavender	Brown	201900228A	Determined Did Not Meet Min	Quals	M	7 PM	lavender.brown@gmail.com			
10	Parvati	Patil	201900228A	Application Reviewed, Not	Selected	M	1 PM	ppatil@gmail.com			
11	Fleur	Delacour	201900228A	Application Reviewed, Not	Selected	M	6 PM	fdelacour@gmail.com			
12	Draco	Malfoy	201900228A	Application Reviewed, Not	Selected	M	9 PM	dmalfoy@gmail.com			



Starting the Mail Merge in Word

The image shows the Microsoft Word ribbon at the top, with the 'Home' tab selected. Below the ribbon is an Excel spreadsheet with a table of names and email addresses. A taskbar is overlaid on the bottom left, showing several applications, with 'Word' highlighted and a red box around it. A red arrow points from the 'Word' icon to a red text box containing the instruction: '1. Save the Excel document then open Word.'

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
	First Name	Last Name	Email														
1																	
2	Gregory	Goyle	ggoyle@gmail.com														
3	Colin	Creevey	ccreevey@gmail.com														
4	Hannah	Abbott	habbott@gmail.com														
5	Seamus	Finnigan	sfinnigan@gmail.com														
6	George	Weasley	gweasley@gmail.com														
7	Viktor	Krum	vkrum@gmail.com														
8	Dean	Thomas	dthomas@gmail.com														
9	Lavender	Brown	lbrown@gmail.com														

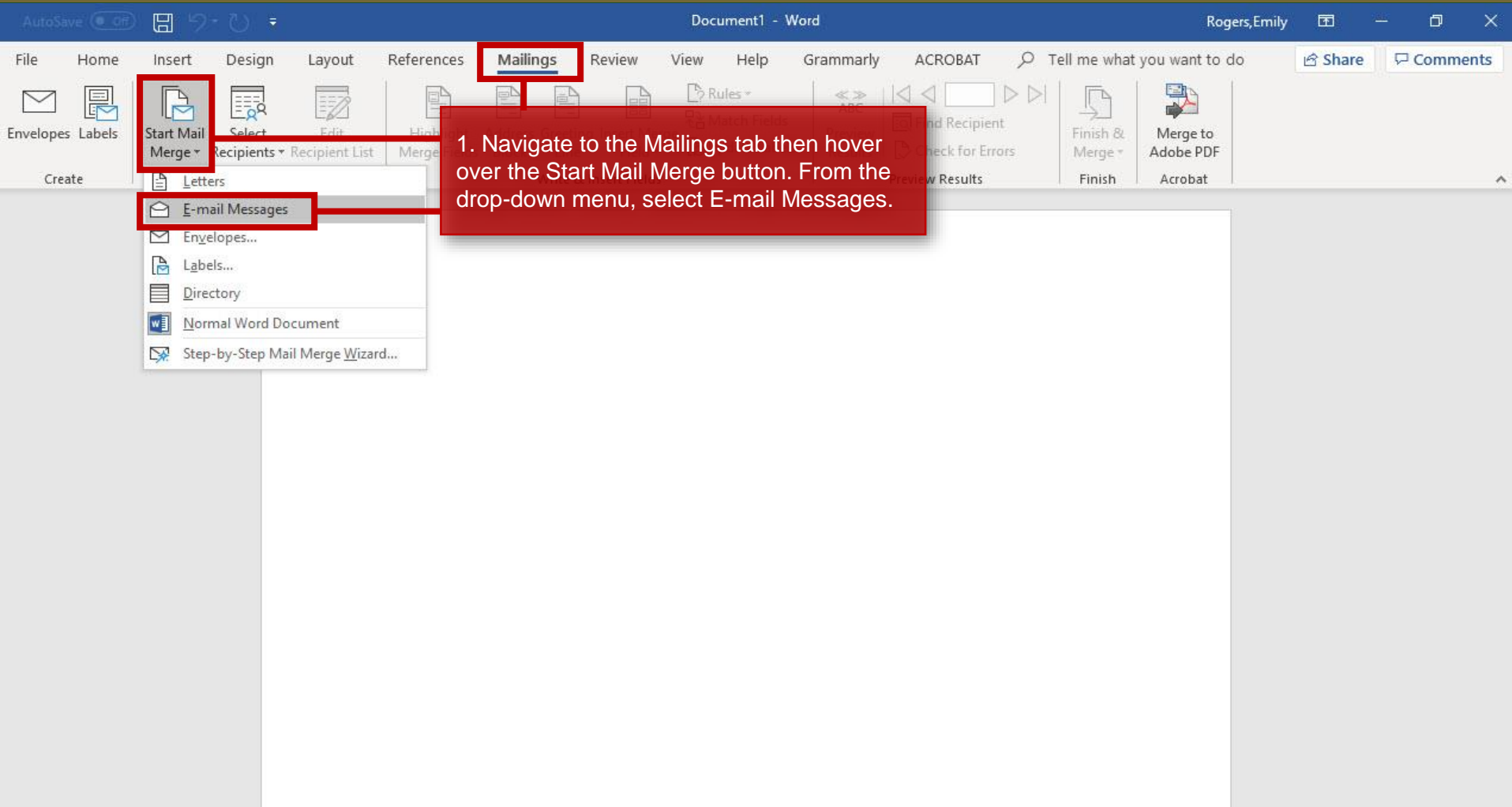
Most used

- Outlook
- File Explorer
- Google Chrome
- Word**
- Snagit 2019 Editor
- Adobe Acrobat XI Pro

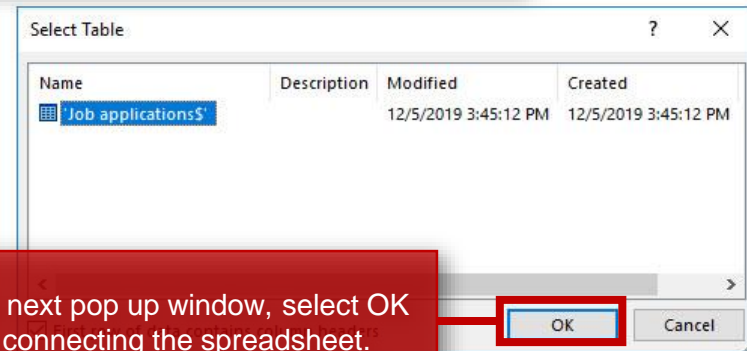
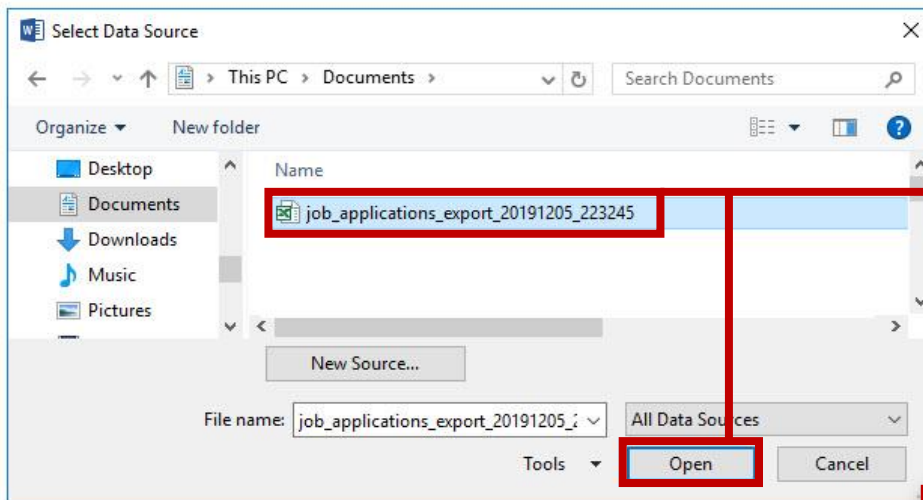
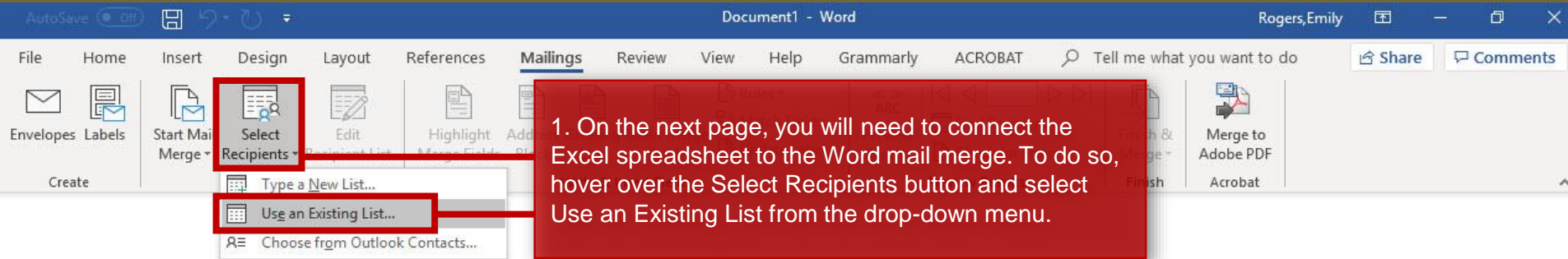
1. Save the Excel document then open Word.



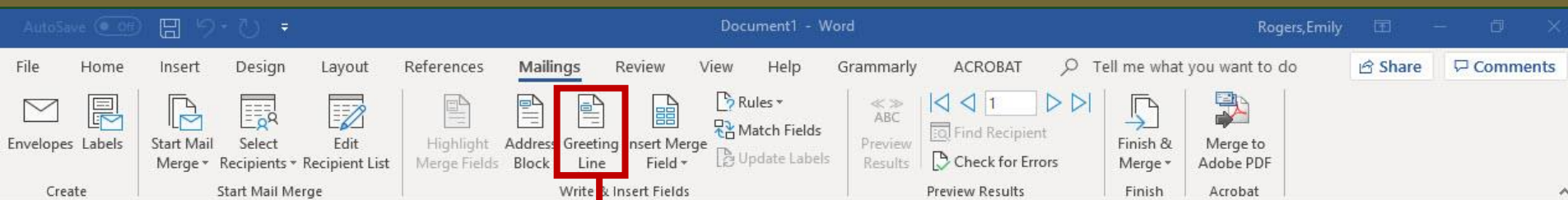
Starting the Mail Merge in Word



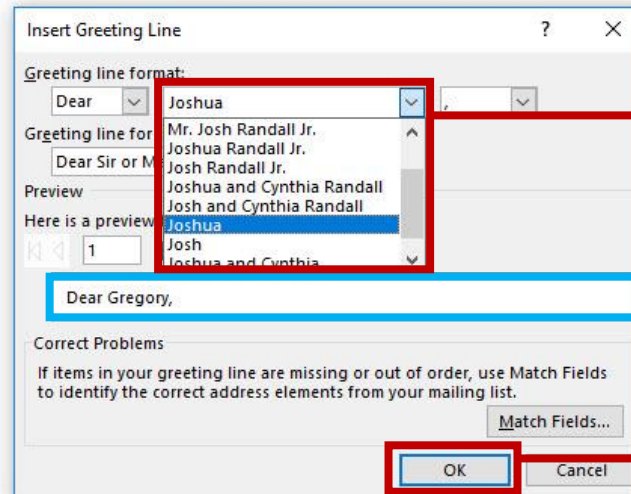
Using your spreadsheet in Word



Adding a Greeting Line to your email



1. Once the spreadsheet is connected to the mail merge, click on the Greeting Line button.



2. In the pop-up window, your desired greeting line from the Greeting line format drop-down menus.

Note: Word will show you a preview of the greeting line here.

3. When you are ready, select OK.

Reviewing and Sending mail merge email

The screenshot shows the Microsoft Word interface with the Mailings tab selected. The ribbon includes options like 'Create', 'Start Mail Merge', 'Write & Insert Fields', 'Preview Results', 'Finish & Merge', and 'Merge to Adobe PDF'. A blue callout box points to the 'Preview Results' button, and another points to the 'Finish & Merge' button's dropdown menu. The document content shows a letter template with a blue callout box highlighting the '«GreetingLine»' field.

Note: Word will insert your selected greeting line into the document.

«GreetingLine»

Note: You may preview the emails by clicking on the Preview Results button. Use the arrow keys on the right through the different names. (For this to work, make sure your cursor is clicked away from the '<<GreetingLine>>' area.)

Thank you for your interest in the Academic Success Coordinator position at Colorado State University. Your efforts in preparing and submitting your application and supporting documents have been thoroughly considered and you are being invited to interview. We value your interest in Colorado State University and wish you well in your future endeavors.

Sincerely,
Test User, Search Chair

1. After selecting a greeting line, type out the email you wish to send. For sample regret letter language, please see the [regret letter template](#).

The 'Merge to E-mail' dialog box is shown with the following fields: 'Message options' (To: Email, Subject line: Academic Success Coordinator position, Mail format: HTML), and 'Send records' (All selected, Current record, From: [blank], To: [blank]). The 'OK' button is highlighted with a red box.

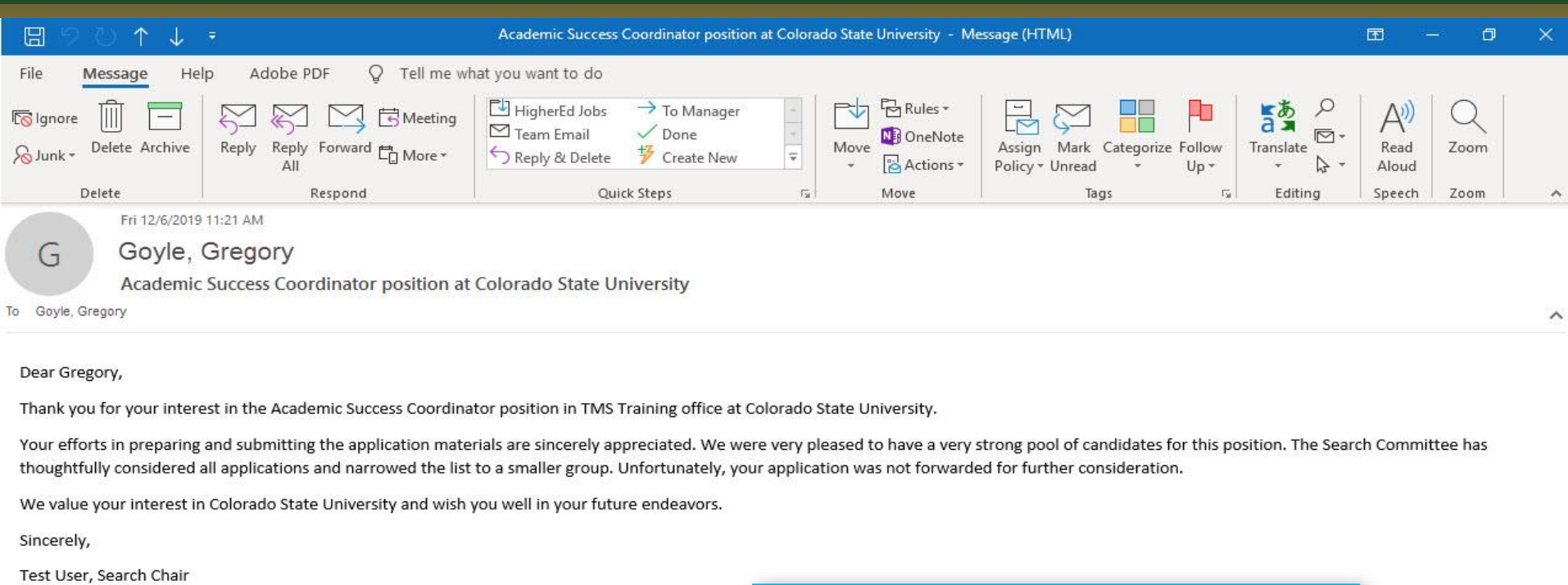
2. When you are ready to send out the mass email, hover over the Finish & Merge button and select Send Email Messages... from the drop-down menu.

3. In the pop up window, type in your desired subject line for the email then click 'OK'.

Note: As soon as you click OK, the system will send out the emails. Be sure everything is ready to go before clicking the OK button.



Applicant's view of email



The screenshot shows an email client window titled "Academic Success Coordinator position at Colorado State University - Message (HTML)". The interface includes a ribbon with tabs for File, Message, Help, Adobe PDF, and Tell me what you want to do. Below the ribbon are various action buttons such as Ignore, Delete, Archive, Reply, Reply All, Forward, Meeting, More, HigherEd Jobs, To Manager, Done, Create New, Reply & Delete, Move, Rules, OneNote, Actions, Assign Policy, Mark Unread, Categorize, Follow Up, Translate, Read Aloud, and Zoom. The email content is as follows:

Fri 12/6/2019 11:21 AM

G Goyle, Gregory
Academic Success Coordinator position at Colorado State University

To Goyle, Gregory

Dear Gregory,

Thank you for your interest in the Academic Success Coordinator position in TMS Training office at Colorado State University.

Your efforts in preparing and submitting the application materials are sincerely appreciated. We were very pleased to have a very strong pool of candidates for this position. The Search Committee has thoughtfully considered all applications and narrowed the list to a smaller group. Unfortunately, your application was not forwarded for further consideration.

We value your interest in Colorado State University and wish you well in your future endeavors.

Sincerely,

Test User, Search Chair

Note: All applicants will receive a seemingly personalized email from you, addressed only to them.



Need further help?

Please visit the OEO website for more resources on the CSU Talent Management System (TMS) at:

www.oeo.colostate.edu/talent-management-system-tms

For additional help, contact the Office of Equal Opportunity at:
(970) 491-5836

or

Email at oeo@colostate.edu

