Colorado State University

Talent Management System (TMS)

How to Create a Mail Merge

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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.

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Creating an Applicant Spreadsheet

1. Select the Applicant Tracking module by clicking the three dots in the top-left corner of the screen.

2. Select Initiator from the User Group drop-down menu.

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Creating an Applicant Spreadsheet

Applicant Tracking System   Welcome, Test User   My Profile   Help   logout

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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 THS 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.

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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 Q More Search Options ˅

Active Applicants ✕

"Active Applicants" **9** Selected records **0** ✕ Clear selection?

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.

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

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.

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Creating an Applicant Spreadsheet

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

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Summary | History | Applicants | Reports | Associated Position Description

Saved Searches ∨

Search

Q Hide Search Options ∨

Add Column: Add Column ▾

Active/Inactive: × Inactive

Workflow State: Select All | Unselect All

First Name: Inactive

Last Name: Active

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

Active Applicants ✕

"Active Applicants" 9 Selected records 0 ✕ Clear selection?

Actions ∨

(Actions)

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Creating an Applicant Spreadsheet

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.

Actions ⌄

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

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

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Creating an Mail Merge from the Applicant Spreadsheet

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.

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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 select multiple columns at once.

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

10

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Starting the Mail Merge in Word

1. Save the Excel document then open Word.

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Starting the Mail Merge in Word

1. Navigate to the Mailings tab then hover over the Start Mail Merge button. From the drop-down menu, select E-mail Messages.

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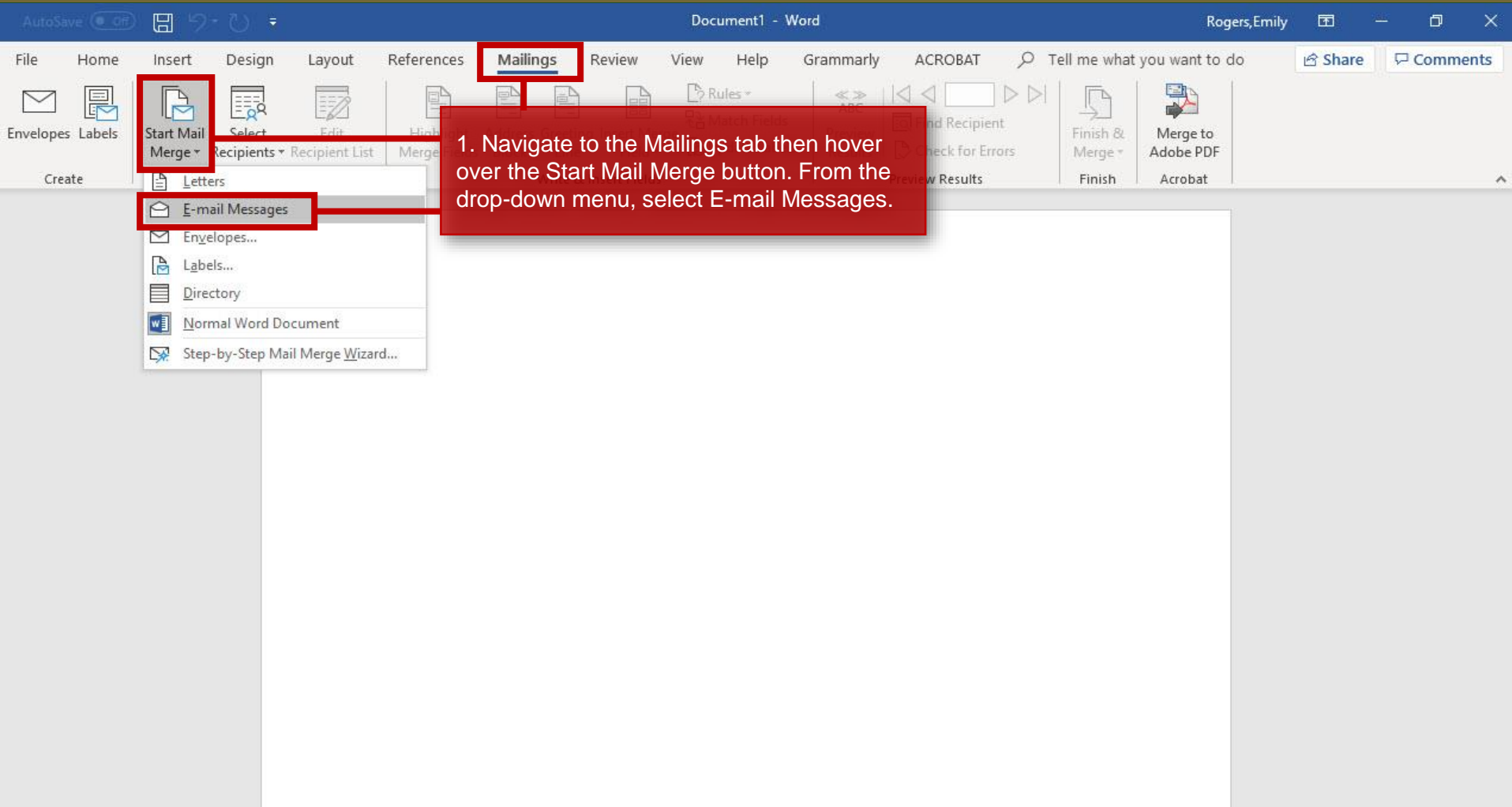
Using your spreadsheet in Word

1. On the next page, you will need to connect the Excel spreadsheet to the Word mail merge. To do so, hover over the Select Recipients button and select Use an Existing List from the drop-down menu.

2. In the pop up window, locate your saved applicant spreadsheet then click 'Open'.

3. In the next pop up window, select OK to finish connecting the spreadsheet.

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Adding a Greeting Line to your email
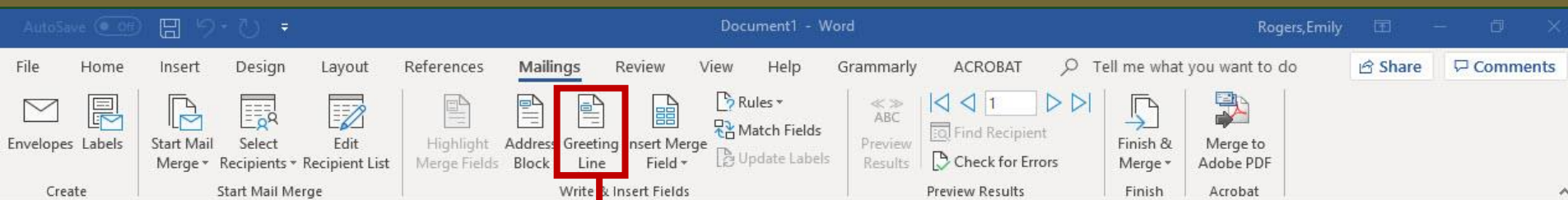
1. Once the spreadsheet is connected to the mail merge, click on the Greeting Line button.
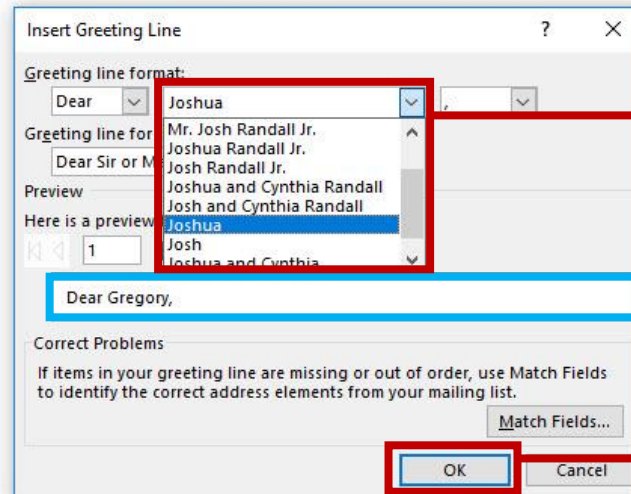
2. In the pop-up window, your desired greeting line from the Greeting line format drop-down menus.

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

3. When you are ready, select OK.

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Reviewing and Sending mail merge email

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

Note: You may preview the emails by clicking on the Preview Results button. Use the arrow keys on the right to scroll through the different names. (For this to work, make sure your cursor is clicked away from the '<<GreetingLine>>' area.)
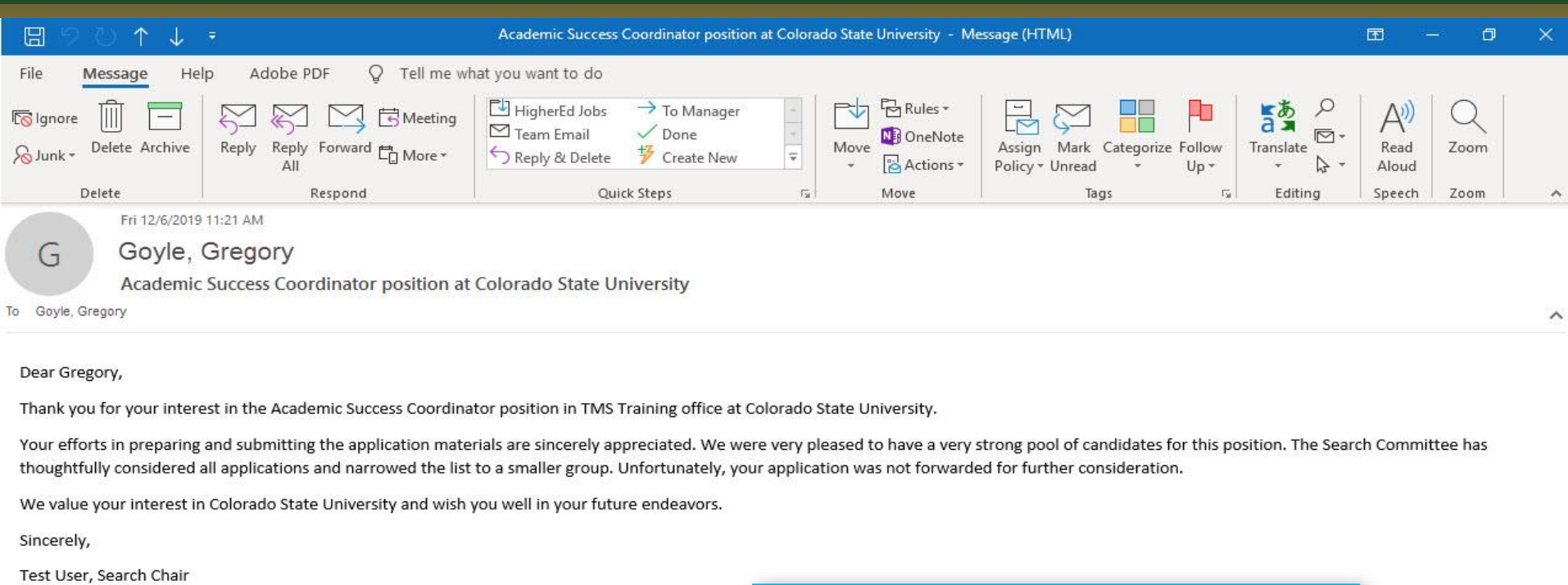
2. When you are ready to send out the mass email, hover over the Finish & Merge button and select Send Email Messages… from the drop-down menu.

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.

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.

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Applicant's view of email

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

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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

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