**LAVGC Yearbook 2024-2025 10/13/24**

**Goal** is to create a more recent version of the LAVGC Membership Yearbook.

**Important Output Files are**:

* Yearbook Cover
* Yearbook Body
* Yearbook Labels

**References Used**:

* **YB**: YearBook
* **RD**: raw date from reviewers, which identifies changes in Executive, Committee members, etc. This must be manually entered into Final YB version.
* **XF**: uSoft Excel file from Lea which contains all updated membership data. Lea will continue to update this file, and provide an addendum as needed.
* **WF**: Microsoft (uSoft) Word file, intermediate file which creates the template for 2024-25 membership list. This file captures the data from XF.

**Prepare new XF**: Lea provide a new XF which incorporate all new changes, such as new members, new contact information, etc. The following procedure will ensure that data is in the correct format for eventual uploading into the intermediate WF.

* Line 1 of the XF must be the header only
* The body of the XF includes all member information only
* All entries below the last member record of the XF must be deleted
* Close the file, no further access is required for the remainder of this activity

**Prepare template for WF**: an interim file using the data from the above XF file is uploaded into a new WF. This WF will eventually be pasted into the new/final copy of the YB.

* Open a new uSoft word file
* Home: set font to Ariel 10
* Layout >> Size >> More Paper Sizes >> Paper Sizes to Statement (W set to 5.5” and H set to 8.5”)
* Layout >> Indent: set Indent Left to 0.31”
* Layout >> Margins >> Custom Margins: set T= 0.4, B= 0.33, L= 0.69, R= 0.38
* Layout >> Margins >> Custom Margins >> Layout: set Header and footer to 0.5”
* On Ruler, set left justified tab to 2.5” (on Ruler, drag set point 2.5 hash marks)
	+ NOTE: and new for 2024-2025, some email are too long for the 2.5” spacing, and the 1st column had to be reduced in length. Adjust as needed
* Save the WF. Also create a few copies, which can be used in the learning process. In the event that this process requires future iterations, the above structure will not need to be recreated.

**Upload XF into WF**: uses uSoft “Mailings” feature to create a generic structure in a word document, then transfers all data from the above XF to the new WF.

* Open WF from above
* Mailings >> Start Mail Merge >> Directory
* Mailings >> Start Mail Merge >> Select Recipients >> Use an Existing List
* Find the XF file from Step #2
* In Select Table notification box, select Xls file name, hit “OK”
* Write & Insert Fields >> Insert Merge Field
* Begin creating the following format, by individually selecting / inserting the desired fields, to achieve the following format

«L\_Name», «F\_Name» «email\_address»
«Street\_Address» (C) «Cell\_Phone\_»
«City», «State» «Zip» (H) «Home\_Phone\_No»

* NOTE: each record is created iteratively .. one at a time, will open / close the Insert Merge Field many times
* NOTE: Must use Shift-Enter at the end of each line, to ensure single spacing, minimal gap between lines
* NOTE: at the end of the records, **do Enter, not a Shift-Enter** to ensure a single spacing between records
* NOTE: if spacing is missing between records, use (4 horizontal bars with arrow up and down), and (Add Space After Paragraph)
* NOTE: go back and do some edits to the fields just entered, add Comma/Space between (1) L & F Name, (2) City, State, Zip
* NOTE: when adding (C), do a backspace delete to remove the inherent Copyright symbol
* NOTE: add (C) and (H) manually, then add relevant label
* NOTE: can ignore commas / spaces / (C) / (H), and then add them when all fields are created .. a time saver
* Mailings >> Preview Results >> “<<ABC>> Preview Result”, to see first record
* If OK, continue
* Mailings >> Finish >> Finish & Merge
* Edit Individual Documents >> Merge to New Document >> All >> OK
* NOTE: will see all records, with only 1 space between records
* NOTE: to go back to enter Fields, must back out of Preview Result mode
* NOTE: closing the file at this point will give the option of saving or not saving. Not Saving returns to the point after the fields are entered .. great since you cannot Control-Z

**Membership List Spacing, IFF the membership records do not have a space between the records**

* The object is to add a space after each member record
* Highlight entire list of members
* Layout >> Paragraph >> Spacing >> After .. change to 6pt
* Should see 9 records in the first page, and
* 13 records in all other pages

**To Create a Member list by First Name, for insertion into the Yearbook Body file**

* Open a new version of the original XF file, and save it as a new “Sorted by First Name”
* Highlight the First Name column
* Data >> Sort & Filter >> Sort
* Expand the Selection >> Sort
* XF should now be sorted by first name
* Open a new WF and name it “Sorted by First Name”
* Layout >> Page Setup >> Columns >> Two
* When you later add content it will be added to the first column on the left and will automatically move to the right column when it reaches the end of the page.
* Mailings >> Start Mail Merge >> Directory
* Mailings >> Start Mail Merge >> Select Recipients >> Use an Existing List
* Find the above XF file called “Label File”
* In Select Table notification box, select Xls file name, hit “OK”
* Write & Insert Fields >> Insert Merge Field
* Create the following format, by individually selecting / inserting the desired fields

«F\_Name», «L\_Name»

* Mailings >> Preview Results >> “<<ABC>> Preview Result”, to see first record
* If OK, continue
* Mailings >> Finish >> Finish & Merge
* Edit Individual Documents >> Merge to New Document >> All >> OK
* CUT& PASTE the content of this new WF into the YB file

**Printing Labels**

* Create a new WF called “Print Labels”
* Mailings >> Start Mail Merge >> Labels >> **5260** Address Labels
* Mailings >> Start Mail Merge >> Select Recipients >> Use an Existing List
* Find the XF file containing original data
* In Select Table notification box, select Xls file name, hit “OK”
* Write & Insert Fields >> Insert Merge Field
* Begin creating the following format, by individually selecting / inserting the desired fields, to achieve the following format

«L\_Name», «F\_Name»

* Mailings >> Preview Results >> “<<ABC>> Preview Result”, to see first record
* If OK, continue
* Mailings >> Finish >> Finish & Merge
* Edit Individual Documents >> Merge to New Document >> All >> OK
* Place Sheets Face Down in Printer and Print

**Miscellaneous**: tricks and thoughts

* Be mindful of document if ending on an “odd” page
* When creating the Intermediate word files, note that when the xls file is absorbed, a new word file is created with all the xls entries for the selected titles. You can save this word file, or simply close without saving. Regardless, it looks like the original formatted word file is preserved. Great.
* Next year, spell out the complete name for: Street, Avenue, etc.