How to download and mail merge LGfL USO account details

Ensuring pupils can access their LGfL account is crucial, and many forget their passwords – particularly when returning from the holidays.

Using these new mail merge tools, you can help pupils and their families remember how to log on to myUSO and to access the many resources available through LGfL. The templates are easy to use and everything can be done using your existing software – only Word and Excel are required.

Getting started

First, you will need to download the latest list of USO accounts at your school. If you are not your school's **nominated contact**, you will need to ask them to do this for you. Step-by-step instructions are available on the LGfL Support website.

The data will download as a spread sheet and should include the following headings:

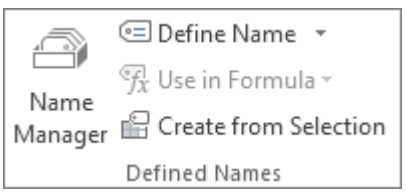
- Short username
- Full username
- Password
- First Name
- Middle Name
- Last Name
- Preferred First Name
- Preferred Last Name
- Email
- UPN
- Date of Birth
- Role
- Year
- Class
- DfE
- Establishment
- Authority

Using this spread sheet, you can now use the mail merge templates to create documents to use in school and for parents.

Prepare your data

Complete the following steps to ensure the mail merge templates don't include empty rows from the spread sheet.

1. Open the spread sheet.
2. Select all of the columns and rows that include data, including the column headers in the first row.
3. With the data still selected, click the **Formulas** tab and in the **Defined Names** group, click **Define Name**.

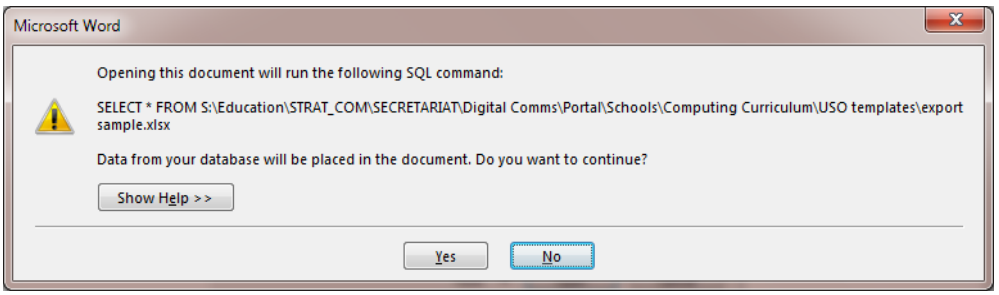


4. In the **Name** box, type a name for the address list, something like **school_name_sep_2018**. Don't include any spaces, and instead use an underscore (_) to separate words.
5. Save the spread sheet in a place where you can later access it.
6. Close Excel.

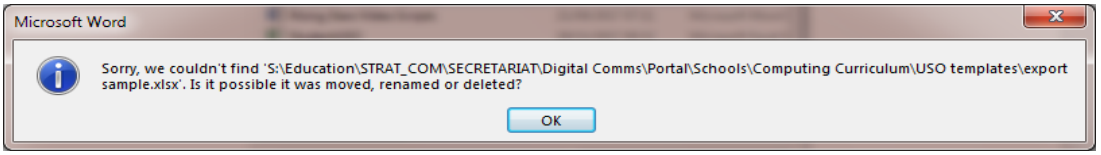
Create a sheet of labels

The **myuso label template.docx** is used to create a sheet of labels for you to stick into each pupil's book.

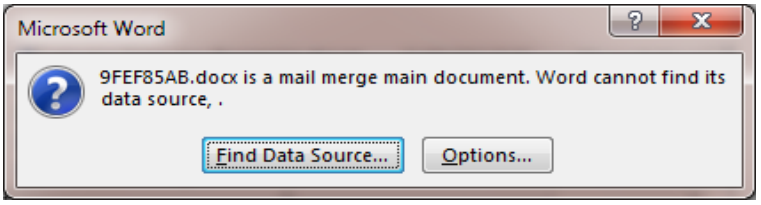
1. Open **myuso label template.docx**
2. Word will warn you of an SQL command and ask if you want to continue. Click **yes**.



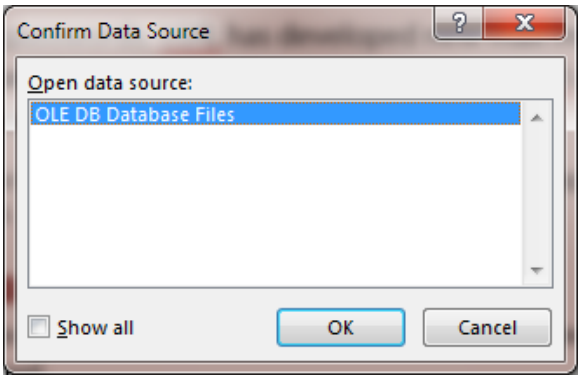
3. You may get another error, saying that the data source is not accessible. Click **okay**.



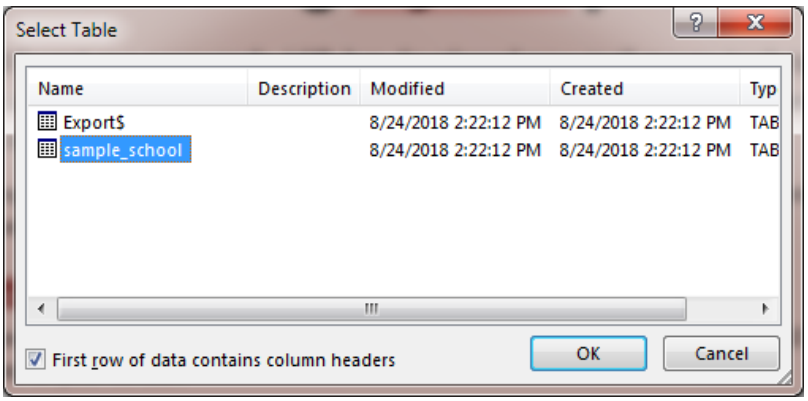
4. Click **Find Data Source** and search for the Excel spread sheet that you saved earlier in **Prepare your data**.



5. **Confirm data source** by clicking **OK**



6. Then select the name of the table you created in Prepare your data, e.g. **school_name_sep_2018**

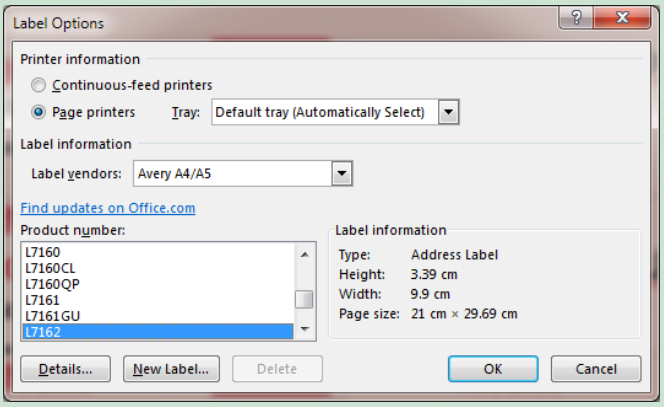


7. Click OK
8. When the document opens, click **Mailings** followed by **Finish & Merge**. Then select either:
    a. **Edit Individual Documents** to create a new Word document of your data
    b. **Print Documents** to immediately send to the printer
9. Select **All** to print all documents, or enter a specific range if you know the records you want to include. See **Filtering data** on how to filter data using the data fields.

Not printing right?

The template is currently set to print a specific size of label – the commonly used Avery with the code L7162. You may need to change this template based on the labels you have. The label sheet should include the brand and product number, or you may need to check the box.

1. In the **Mailings** tab, click **Start Mail Merge** followed by **Labels**.
2. In the Label Options dialogue, select the brand of label you have, followed by the product number.

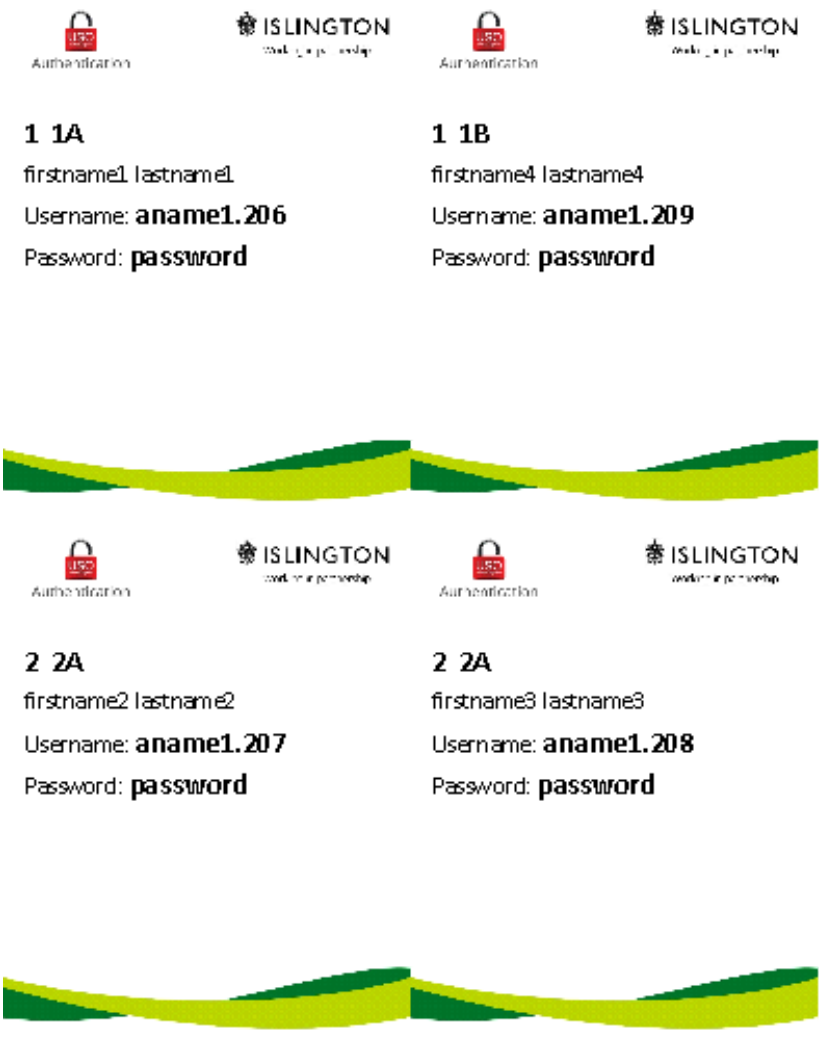


More instructions on how to select the appropriate labels can be found on the Office support website.

Create a sheet of cards

The **myuso one quarter page template.docx** is used to create a set of cards for each pupil, which can be printed on A4 paper and then cut in four.

1. Open **myuso one quarter page template.docx**
2. Follow the same instructions in **Create a sheet of labels** to update the document to find your locally saved mail merge data source
3. When the document opens, click **Mailings** followed by **Finish & Merge**. Then select either:
    a. **Edit Individual Documents** to create a new Word document of your data
    b. **Print Documents** to immediately send to the printer
4. Select **All** to print all documents, or enter a specific range if you know the records you want to include. See **Filtering data** on how to filter data using the data fields.



Create a letter to send home to parents

The **myuso letter template.docx** is used to create individual letters to print and send home to parents.

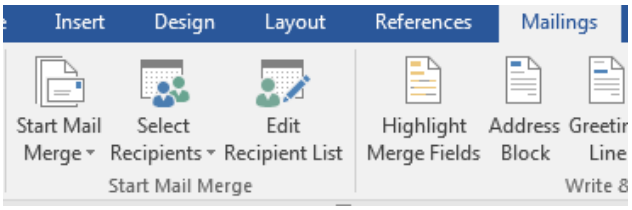
1. Open **myuso letter template.docx**
2. Follow the same instructions in **Create a sheet of labels** to update the document to find your locally saved mail merge data source
3. When the document opens, replace all text in [SQUARE BRACKETS].
4. When you are ready, click **Mailings** followed by **Finish & Merge**. Then select either:
    a. **Edit Individual Documents** to create a new Word document of your data
    b. **Print Documents** to immediately send to the printer
5. Select **All** to print all documents, or enter a specific range if you know the records you want to include. See **Filtering data** on how to filter data using the data fields.

You can also use **myuso poster.docx** if you prefer to use a more visual leaflet.

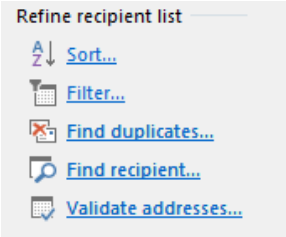
Filtering data

If you want to filter the data, for example to only print labels for a specific class or year group, you can do this before completing the mail merge.

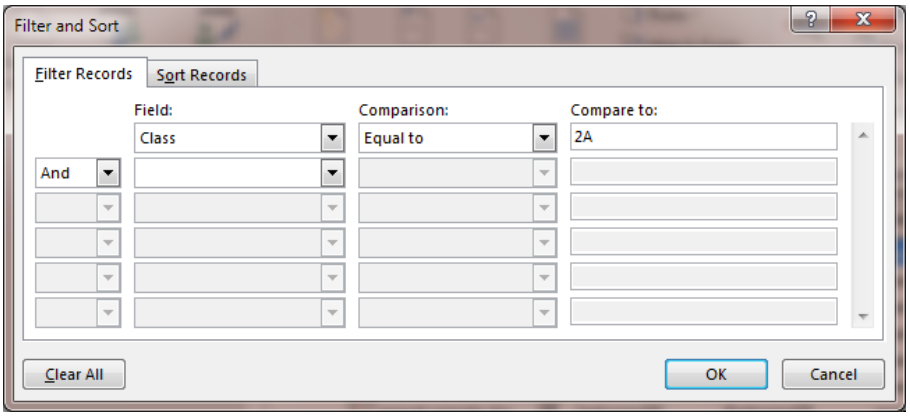
1. In **Mailings** select **Edit Recipient List.**



2. Then, select **Filter…** from **Refine recipient list**



3. Select the field you want to filter by, and enter the text you want to compare to. For example, to only print a list of users from class “2A”, select ‘Class’ from the **Field** drop-down and enter 2A in **Compare to:**



4. Click OK
5. Select **Mailings** followed by **Finish & Merge**. Then select either:
    a. **Edit Individual Documents** to create a new Word document of your data
    b. **Print Documents** to immediately send to the printer
6. Repeat this process for each class or year group.
7. To clear the filters, click **Clear All** in step 3.