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

1. Log into the TMS at https://jobs.colostate.edu/hr.

2. Select the blue, ‘Applicant Tracking’ module and ‘Applicant Manager’ user role.

3. From the ‘Postings’ tab, select either ‘Admin Professional/Research Professional’ or ‘Faculty’ from the drop down menu.
Creating an Applicant Spreadsheet

1. Locate the correct posting and click on it's working title.

Note: You can search for the posting by typing the posting number into the search bar then clicking ‘Search’.

Shortcut: Hover over ‘Actions’ and select ‘View Applicants’ to be taken directly to the ‘Applicants’ tab within the posting.
Creating an Applicant Spreadsheet

1. Click on the ‘Applicants’ tab.

Note: If you clicked on the working title, you will be taken to the posting’s ‘Summary’ tab.
Creating an Applicant Spreadsheet

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.

1. Since you will be creating an applicant spreadsheet for unsuccessful ('Inactive') applicants, 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 still applicants in the active 'Hold' workflow states, you will need to export a list containing their information as well.
1. From the expanded 'More Search Options' menu, click 'Inactive', then click 'Search'.
Creating an Applicant Spreadsheet

1. To add an email column, select 'Email' from the 'Add Column' drop down menu, then click 'Search'.

Note: After you click 'Search' only those in inactive workflow states will show up in the list below.
Creating an Applicant Spreadsheet

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

Note: Notice the new ‘Email’ column added to the list of applicants below.
Creating an Mail Merge from the Applicant Spreadsheet

Note: You now have an exported applicant spreadsheet with the 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.
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.

Note: You will need to delete columns that contain irrelevant information for the mail merge (Posting Number, Workflow State, and Application Date).
Starting the Mail Merge in Word

1. Once you have deleted the columns and only 'First Name', 'Last Name', and 'Email' remain, save the document.

2. Open Word.
Starting the Mail Merge in Word

1. Open a blank Word document.

2. Navigate to the 'Mailings' tab then hover your cursor over the 'Start Mail Merge' button and select 'E-mail Messages' from the drop down menu.
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 then 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. From the next pop up window, select ‘OK’ to finish connecting the spreadsheet.
Adding a Greeting Line to your email

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

2. In the pop up window, select how you would like to address each recipient from the ‘Greeting line format’ drop down menu.

   - Dear
   - Dear Sir or Madam
   - Josh and Cynthia Randall
   - Josh Randall Jr.
   - Josh and Cynthia
   - Josh
   - Cynthia
   - Glenda

   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

1. After selecting a greeting line, type out the email you wish to send.

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

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

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.)

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.
Dear Emily,

Thank you for your interest in the position of Communications Coordinator 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 encourage you to apply to additional open positions.

Sincerely,

Chair Name, Chair
Open Position Job Title, Search Committee

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