



MS-OFFICE CUSTOM TENT CARDS

Merging Excel Data on
Double-sided Tent Cards

Camtasia Training

MS-Word Custom Tent Cards: Merging Excel Data on Double-sided Tent Cards

Purpose

Microsoft Word predefined tent cards are not the most user friendly, as they do not allow to print names on both sides. At time, during an in-person training, the facilitator might walk behind trainees and not see their names, or the trainees might not see the names of the person seating to their left or right. This video is an advanced tutorial shows how to create custom tent cards with names on both sides.

Target Audience

Administrative staff, event coordinators who setup meetings

Directions for Developers

The zip file contains 3 videos with step-by-step process and the logo. Voice Over Script is included in each scene.

Video 1

Step 1 – Create a Tent Card Template in MS-Word 365

Video 2

Step 2 – Connect the Excel File & Format the Merge Fields

Video 3

Step 3 – Create a NextRecord & Finalize the Merge

Storyboard Table

Left column: audio script. Follow the videos and process to place the audio appropriately.

Middle column: Text on the screen. *Grammatical and spelling errors matter here-* please correct any mistakes you find in this column.

Last column: images, graphics, and animations that will occur. Follow the video recordings for callouts, zoom-n-pan, cursor effects and other animations.

General Comments

Track Changes is on. Please make any simple corrections within the script or the text on screen columns.

Use the “*Comments*” feature to ask questions or make comments on larger issues within the script or on-screen text.





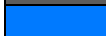
Design Elements


Scene background: White


Font: Montserrat

Transition scenes: Titles are white font in light blue rectangle

Color Palette

Color	HEX
	#5C88AF
	#02335C
	#FFFFFF
	#5c5c5c
	#007aff

Scene 1 Title: Custom Tent Cards		
Audio Script:	Text on Screen:	Images/ Animations/Graphics
This tutorial will show you how to create custom tent cards with names on both sides.	Custom Tent Cards	<p>Logo zoom out from full screen to small size and stops on the left side vertically centered</p> <p>Title Custom Tent Cards is revealed after in a light blue rectangle, white font placed to the right of the logo and span the screen.</p> <p>Audio starts after animation completes.</p> 

Scene 2 Title: Step 1 – Create a Tent Card Template in MS-Word 365		
Audio Script:	Text on Screen:	Images/ Animations/Graphics
Step 1 – Create a Tent Card Template in MS-Word 365	Step 1 – Create a Tent Card Template in MS-Word 365	<p>Same layout than at the end of Scene 1.</p> <p>Logo to the left and title in two lines maximum.</p> <p>No animation.</p> <p>Screen changes to the beginning of the step-by-step process</p> 

Scene 2a no title -		
Audio Script:	Text on Screen:	Images/ Animations/Graphics
<p>Create a new word document by clicking File New and then blank document.</p> <p>Click File Save As and save your document in the directory of your choice.</p> <p>From the top ribbon, select LAYOUT and click the arrow to open the PAGE SETUP window.</p> <p>In the LAYOUT tab, under PAGE, select CENTER, then click the MARGINS tab and change all margins to 0.5 inch. Click OK to apply the selection.</p> <p>From the INSERT ribbon, click TABLE and select 2 x 1 which will create a 2 column 1 row table. With the cursor blinking on the left column, right click the mouse and select TABLE PROPERTIES.</p> <p>Click Borders and shading. You will remove any borders. Select None below Setting and Select TABLE in the apply to area. If it not selected already, click the down-arrow to reveal the three choices. Click OK to return to the main Table Properties window. Next click the Row tab to enter the height of the row.</p> <p>Make the row tab exactly 9.5 inches as demonstrated.</p> <p>Click the Column tab. The column width should be 3.75 inches already. Click OK. You have now created a custom tent card.</p>	<p>Callout for margins</p> <p>Press Tab to move to next margins & enter .5</p>	<p>Zoom-n-pan to the areas the audio mentions when the words in the audio script are bold</p> <p>On arrow: sketch motion light blue circle</p> <p>Move Pan to show page setup</p> <p>On “all margins to 0.5 inch”</p> <p>Split audio and let video play to show the margins being changed.</p> <p>Insert Callout</p> <p>Zoom out to normal on Press OK.</p> <p>Zoom in on Insert ribbon, Table.</p> <p>Move pan to middle of screen to show on right-click animate the mouse with a target cursor effect (light blue)</p> <p>then zoom out a little to show the table properties window.</p> <p>On “as demonstrated” split the audio and let video finish entering row height and selecting row height conditions.</p> <p>Resume audio after</p> <p>At Click the column Tab, zoom back to full size.</p>

Scene 3 Title: Step 2 – Connect the Excel File and Format the Merge Fields		
Audio Script:	Text on Screen:	Images/ Animations/Graphics
Step 2 – Connect the Excel File and Format the Merge Fields	Step 2 – Connect the Excel File and Format the Merge Fields	Same layout Scene 2. Logo to the left and title in two lines maximum. No animation. Screen changes to continue the video

Scene 3a no title -		
Audio Script:	Text on Screen:	Images/ Animations/Graphics
<p>You should see a table with two long columns. Select the columns by placing your mouse above the top lines until it changes to a black arrow pointing down, click and drag the mouse until you see the two columns greyed out.</p> <p>Click the Layout Ribbon, and the second icon in the second row. This will center the text vertically and horizontally in the columns. We will use Text Direction a bit later, to change the direction of the names in each column.</p> <p>We are now going to connect the document with the excel file containing the names to be merged and format the fields.</p> <p>Click the Mailings Ribbon. In the Start Mail Merge Tab, Select Recipient, click Use an Existing List. This will open the Select Data Source Tab. Find, then select the Excel File that holds the data in your folder and click Open. A window opens showing all the sheets on your excel file. This Excel file has only one sheet. Make sure First row of data contains column headers is checked. Click ok.</p>		<p>Cursor spotlight at “select the columns”</p> <p>Zoom-n-pan on layout ribbon. Zoom out to normal after in each column</p> <p>Move Pan to Select Table Window on a window opens showing</p> <p>Move Pan back to top of Mailings ribbon on several tabs become visible. Add Sketch Motion red line from “Edit Recipient List” to “Finish & Merge” tabs.</p> <p>Zoom out a little on Select FirstName.</p> <p>Keystroke callout: keyboard key Enter on press enter</p> <p>Zoom back to normal view after.</p> <p>Zoom-n-pan to Layout on to change the font size.</p> <p>Zoom out on click text direction.</p>

Scene 3a no title -		
Audio Script:	Text on Screen:	Images/ Animations/Graphics
<p>Several tabs become visible in the Mailings ribbon, confirming that your Excel file is now connected with the tent card template.</p> <p>Select FirstName in the Insert Merge Field, Press Enter, and Select LastName.</p> <p>Highlight both fields to change the font size and the text direction. Click the Layout ribbon and click Text Direction until the selection faces downward.</p> <p>With the fields still selected proceed to the Home ribbon, increase the font size for the first name and last name, then click B to make them bold.</p>		
<p>Copy the field by Pressing control C on your keyboard. Click on the right column, and press Control V on your keyboard. The fields are not pasted, but you can see they are not in the correct direction. With the field still selected, click Layout ribbon again and Text Direction until the fields faces upward.</p> <p>Click the Mailings Ribbon and select Preview Results. The first name should be displayed correctly with left text going downward and right text going upward. The names will print correctly, when the tents are printed and folded.</p> <p>We are almost done. Right now, there is only one tent card. We need to complete few more steps to tell Word to merge all names. This will not take long.</p>		<p>Keystroke callout: keyboard key Ctrl+C on pressing Control C</p> <p>Keystroke callout: keyboard key Ctrl+V on pressing Control V</p> <p>Short Zoom-n-pan to layout to show Text Direction on layout ribbon Zoom out</p> <p>Zoom-in and out from Mailings to show Preview results.</p>

Scene 4 Title: Step 3 – Create a NextRecord & Finalize the Merge		
Audio Script:	Text on Screen:	Images/ Animations/Graphics
Step 3 – Create a NextRecord & Finalize the Merge	Step 3 – Create a NextRecord & Finalize the Merge	Same layout Scene 2. Logo to the left and title in two lines maximum. No animation. Screen changes to continue the video

Scene 4a no title -		
Audio Script:	Text on Screen:	Images/ Animations/Graphics
Click again Preview Results to deselect it. Place your cursor at the end of the right column and press Tab to create a new page and table. Copy the fields from left and right columns of the first page to the columns in the second page.	[1] Click and drag to select the fields [2] Click to place the cursor on the left column	Cursor spotlight on Preview Results at entrance Cursor spotlight on cursor at the end of the right column . Keystroke callout: keyboard key Tab on Press Tab Split audio and stop until copy paste of the name fields are done. [1] Use callouts for text on screens and keystroke callout for copy and paste. [2] Use Cursor spotlight when video shows cursor being click on the second page first column. [1] and [2] are repeated for the second column o the first page.
Click Preview Results and you see that the same name appears. Click Preview Results again to show the fields. Click FirstName of the first column page 2 so the cursor blinks before it. In the Tab Write and Insert Fields click the Down Arrow next to Rules. Select Next Record.		Cursor spotlight on Preview Results (twice) Zoom-n-pan on FirstName . Move Pan to Mailings ribbon Add Sketch Motion red line under Write & Insert Fields tab. Zoom out after select nextrecord .

Scene 4a no title -		
Audio Script:	Text on Screen:	Images/ Animations/Graphics
<p>Finally, Click the down arrow of Finish and Merge and select Edit Individual Documents. This will create a separate document that will allow you to verify all names are properly displayed. In the Merge to New Document Window, select All and click OK.</p> <p>The merge is complete.</p> <p>You now have tent cards that will have names printed on both sides with the text in the correct direction.</p>	<p>Click ¶ hide the paragraph marks if desired</p>	<p>Zoom in Finish & Merge on click the down arrow.</p> <p>Zoom out slightly, to show Merge to New Document window.</p> <p>Zoom out to normal size on merge is complete.</p> <p>Keystroke callout: keyboard key Enter on press enter</p> <p>Zoom back to normal view after.</p> <p>Callout on you now have.</p>

Scene 5 Title: Thank You!		
Audio Script:	Text on Screen:	Images/ Animations/Graphics
<p>Thank you for following along. We hope this tutorial was helpful.</p>	<p>Thank You!</p>	<p>Transition: Fade in</p>