

# 5 MAIL MERGE AND RELATED OPERATIONS

## Form letters, data sources, and mailing labels

### LEARNING OUTCOMES

Microsoft *Office 2000* is an integrated suite of programs. This means that the different components of the software--the *Word* word processor, the *Access* database, the *Excel* spreadsheet, and the *PowerPoint* presentation Tool--are all part of the same system. As a result, you can easily switch from one component to another, cut and paste data between documents, and above all use a common set of data processing tools across the range of applications. The steps required to edit, copy, arrange, print, format, cut and paste, and so forth are more or less the same whether you are in the word processor, database, spreadsheet or presentation components of Microsoft *Office 2000*.

You can merge data from a database into different types of *Office* documents to produce any number of versions of a standard document tailored to address individual recipients. This is especially useful when creating form letters, which are another type of template or stationery document. But you can also merge data into a spreadsheet (such as an invoice or other accounting document) or into a drawing document. You can create mailing labels, or any document that requires fill-in-the-blanks data.

In this tutorial you will practice these skills by writing a form letter to your students' home contact (parents or guardians). A form letter is simply a letter which is to be circulated to a group of people such as parents, and into which you place data specific

to each individual in the group. So a form letter is a personalized circular letter that is customized for each individual receiving it.

The first of the two letters you are going to develop will inform parents of an upcoming field trip. The second will report on each student's progress after five weeks of a class session. The Microsoft *Word* mail merge feature greatly simplifies the process of creating form letters of this kind.

In this tutorial, then, you will complete the following tasks:

- prepare a Data Source document for a merge document
- create the merge document (a form letter)
- print a set of field trip notices
- prepare mailing labels
- print the mailing labels
- prepare a new merge document using an existing Data Source document

**A caveat before you begin:** You'll find it easiest to use the tutorial if you follow the directions carefully. On computers there are always other ways of doing things, but if you wander off on your own be sure you know your way back!

### A word to the wise

This tutorial will cover a lot of ground. You have worked through four tutorials up to this point, so you should have considerable background using Microsoft *Office 2000*. For this reason the directions will not be as detailed as in previous tutorials. There will be less hand-holding, so you will have to *think, remember* and, in so doing, *consolidate* all that you have learned.

You are going to create a Data Source file, and then merge the data into a *Word* merge document. This merge document will be used by *Word* to control the printing of a set of customized letters to parents that will be the final product of the first part of the tutorial. You will also learn how to create mailing labels. The last part of the tutorial will step you through the process of creating a merge document using an already existing Data Source document.

## 5.1 GETTING STARTED

Start by opening **Microsoft Word**

Make sure you have your **WorkDisk** in the floppy disk drive, then open the **3 1/2 floppy A:** drive and in the **Mergedocs** folder open the **Letters** word processing document

Assuming all is well, you are ready to get to work. The process of merging data with a form letter involves the following three steps:

1. Preparing a Data Source document which will contain the data that is to be merged with the form letter.
2. Creating the merge document (the form letter).
3. Printing the customized form letters.

The next section will step you through the process of preparing a Data Source document. Section 5.4 will help you create the form letter (Step 2). This form letter will contain the place holders which eventually will be filled with data from the Data Source document. Section 5.5 will take you through Step 3—the process of printing the customized letters.

## 5.2 PREPARING THE DATA SOURCE DOCUMENT

In this section you will learn how to handle Step 1. Before writing the form letter you must prepare the records that will be merged with it.<sup>1</sup>

Double click on the **Tools** menu to see the complete set of options in the menu, then select **Mail Merge...**

This brings up the *Mail Merge Helper* dialog box (Fig. 5.1).

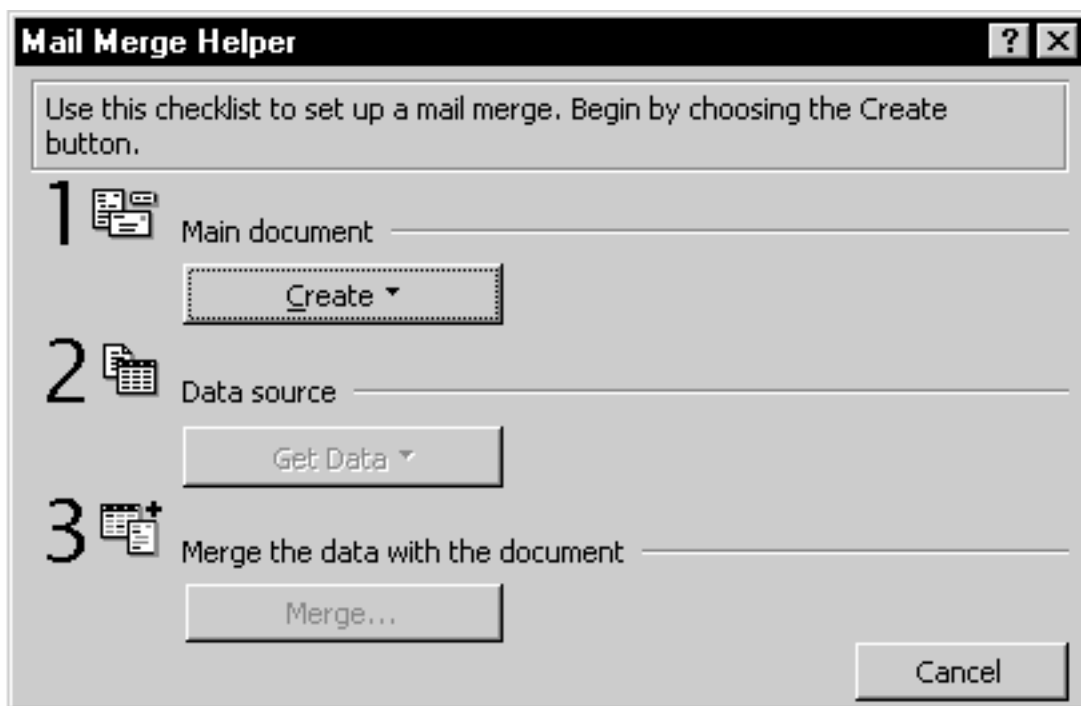


Fig. 5.1 The Mail Merge Helper dialog box

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<sup>1</sup> You don't have to do this first. If you preferred, you could create the form letter without any indication of mail merge features (placeholders, as *Microsoft Office* calls them), then add these later when you have a set of database records ready. For this exercise, however, you'll get the database records together first, before preparing the form letter.

The Mail Merge Helper dialog box asks you to specify (1) the type of main document you will use for the mail merge (in this case a *Form Letter*); and (2) the Data Source document which will contain the data to be merged with the Form Letter.

Click on the **Create** button to bring up the drop down menu which allows you to select the type of **Main document** you want to use (Fig. 5.2)

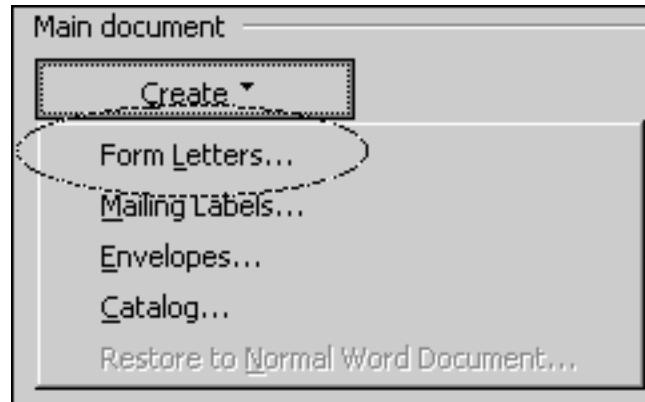


Fig. 5.2 What type of Main document do you want to use?

Click on **Form Letters...** then, in the dialog box that is presented next, click on the **Active Window** button to tell *Word* that, for the form letter template, you are going to use the **Letters** template you opened just now

The next step (Step 2 in the Mail Merge Helper dialog box) is to select the *Data Source*

Click on **Get Data** to bring up the drop-down list (Fig. 5.3) which asks you to select the **Data Source document** for the mail merge operation

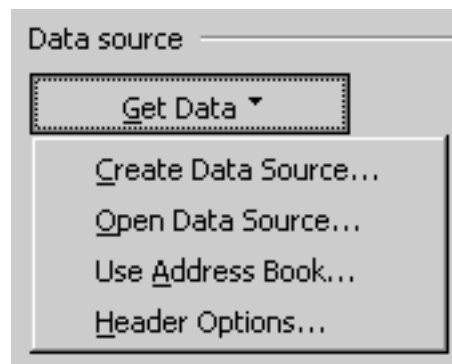


Fig. 5.3 Select the Data Source

You are going to create a new Data Source document, so click on **Create Data Source...**

This brings up the Create Data Source dialog box (Fig. 5.4). You now have to designate each of the field names for the set of records you are going to enter into the Data Source document. As it happens, almost all of the fields you need are among those listed in the *Field Names in header row:* list box. Here's how you select the ones you want.

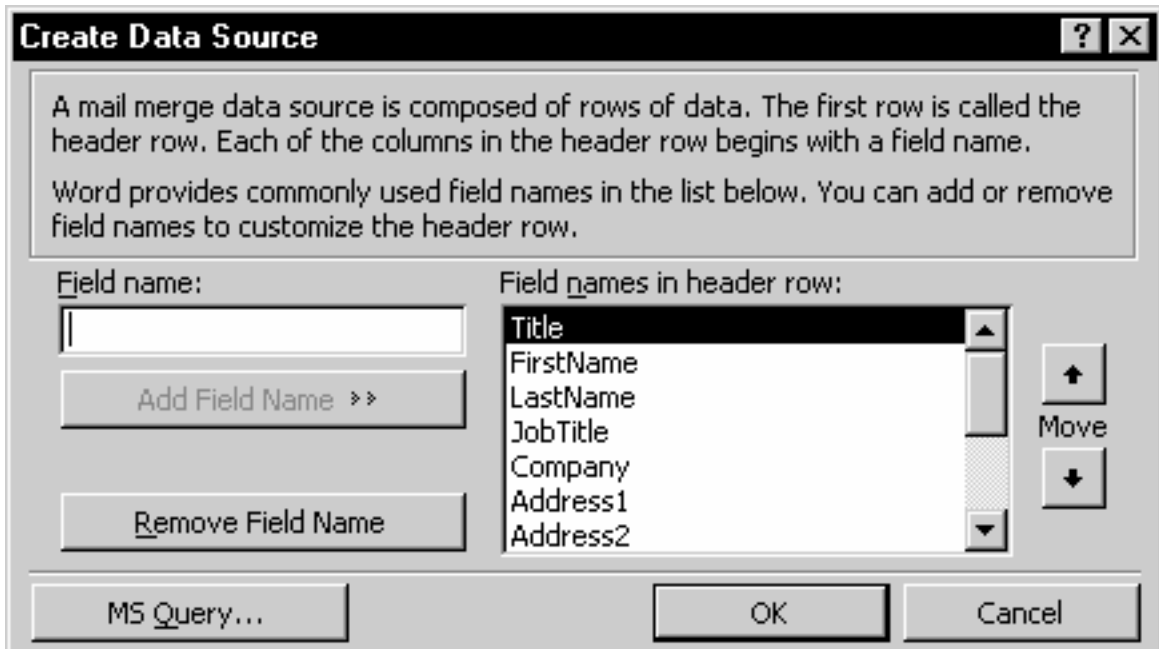


Fig. 5.4 The Create Data Source dialog box

The first field selected is **Title**, which you don't want, so click on the **Remove Field Name** button in the dialog box

Instead of the Field Name *Title*, you want the field name *HomeContact* (notice that no spaces are allowed in Data Source field names).

In the **Field Name:** data entry box type the name **HomeContact**

Click on the **Add Field Name >>** button to add this new field to the list of field names, then scroll back up to the top of the list till you see **First Name** in the list of Field Names

You want to keep the **FirstName** field name, so skip down and select **LastName**, which you don't need in the Data Source document, so click on the **Remove Field Name** button

Also remove the **Job Title** and **Company** field names, but keep the field name **Address1**

Skip down again and remove the **Address2** field name, but keep the **City**, **State**, and **PostalCode** field names

Next, remove the **Country**, **HomePhone**, and **WorkPhone** fields

The final order of the field names doesn't matter, since you'll choose them at from a list when you come to embed them (place them) within the form letter you'll be writing shortly.

Click on **OK** to accept the newly created **Data Source** document

The first thing *Word* wants you to do now is give the Data Source document a name, so on the screen you are presented with the Save As dialog box.

Call the Data Source document **FieldTrip** and click on **Save** to save the file in the **Mergedocs** folder on your **WorkDisk**

Now you are advised in the *Word* dialog box (Fig. 5.5) that your Data Source document has no data in it. Thus you are going to need to edit the Data source document.

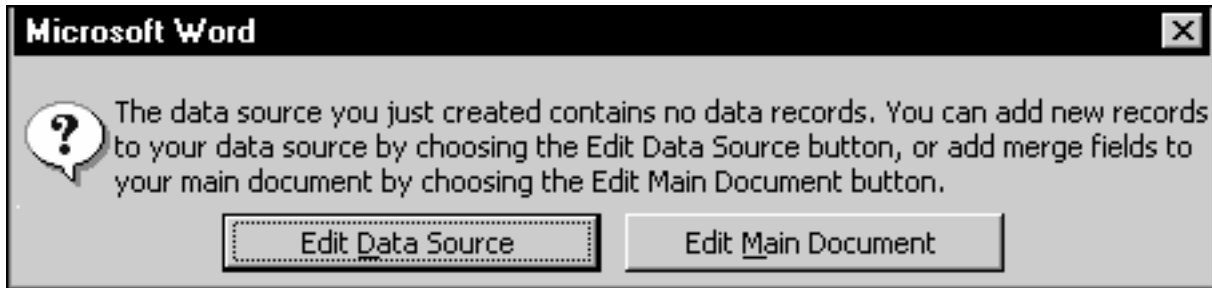


Fig. 5.5 prompt to add data to the records in the new Data Source document

Click on the **Edit Data Source** button in the dialog box

This brings up a new dialog box (Fig. 5.6) in which you fill out a form for one of the records that will be in the Data Source document. You are going to enter the data for 5 records in all. You will shortly be merging this data with the merge letter.

Fig. 5.6 The Data Form data entry dialog box

**Don't click on the OK button until you have typed in 5 sets of records**

Go ahead and enter the data for **one** record (six fields, starting with the **HomeContact** field and ending with the **Postalcode**--the HomeContact field

is a name like Mr. and Mrs. Doe); hitting the **Enter** key after you type in each field entry

Notice when you hit Enter after typing the PostalCode that *Word* automatically brings up a new empty form for you to enter the data for the next record.

Make up **five** sets of data for **five** records, just typing the data for each field in the data entry boxes, starting with the name of a parent or other **HomeContact**, pressing **Enter**, and so on down the form

After you have entered the data for **five** records, click on the **OK** button

*Word* now clears the Data Form dialog box off the screen and brings up the *Active Window*, namely the *Letters* word processing template which you loaded at the beginning of this lesson. You are next going to use this Letters template as the basis for the form letter which will include place holders for the data to be merged from the Data Source document you just created. *Word* also automatically displays the Mail Merge Toolbar at the top of your document (Fig. 5.7).

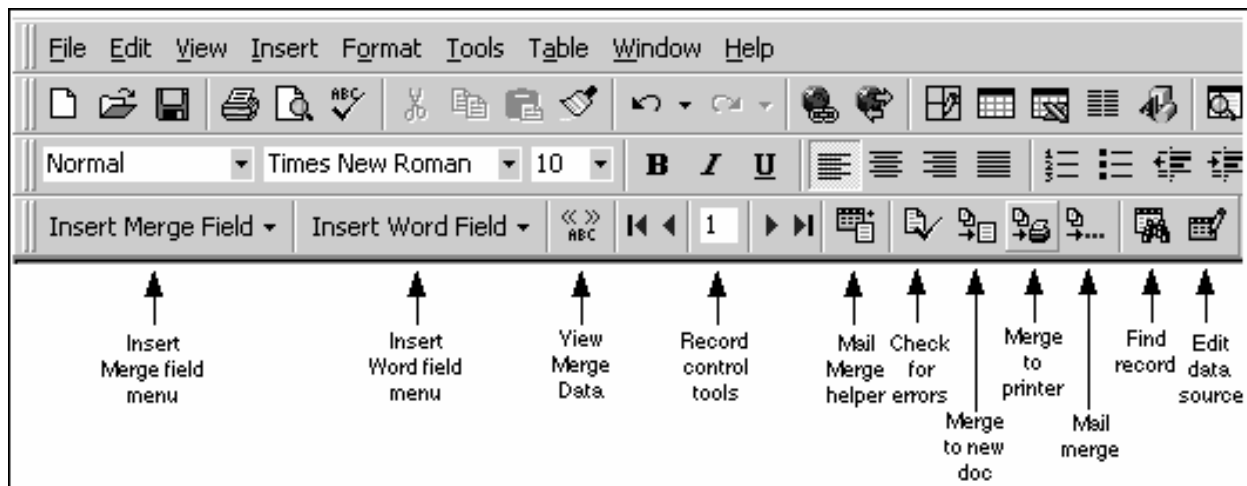


Fig. 5.7 The Mail Merge Toolbar

So, you have all the data for the merge document ready in a Data Source document called FieldTrip. Now for the form letter into which this data will be merged.

### 5.3 CREATING THE MERGE DOCUMENT (THE FIELD TRIP REPORT)

For Step 2 of the process of merging data for the form letter, you are going to create the Field Trip announcement letter into which will be merged the records that you have prepared in the FieldTrip Data Source document.

Fig. 5.8 on the next page shows the complete contents of this FieldTrip letter which you will shortly be typing into the Letters template document. You'll need to refer back to this letter in due course.

Hodge Road Elementary School  
123 Mingo Bluff Road  
Knightdale, NC 23456  
Wednesday May 1, 1999

<<Home Contact>>  
<<Address1>>  
<<City>>, <<State>> <<PostalCode>>

Dear <<Home Contact>>:

This is to let you know that on June 3rd we plan to take <<FirstName>>'s class on a day long Field Trip to the Edison Home in North Fort Myers. The trip will be the culminating activity after a five week Science unit where the work of Thomas Edison has been especially a focus of interest for the class.

<<FirstName>> will leave and return within the normal time for the school day, so there will be no disruption to your own schedule.

Please prepare <<FirstName>> a pack lunch for the trip. The restaurant facilities at the Edison home are somewhat expensive and we have been unable to negotiate an acceptable reduced charge for school children.

Please feel free to call me at school at 772-3232 should you have need to discuss this matter further. Thank you for your help and support in this endeavor and throughout the year.

Yours very sincerely,

Donna Hendry  
1st Grade teacher

Fig. 5.8 The merge document (form letter)

Begin by renaming the Letters template document so that you can keep this template for further use.

In the **File** menu select **Save As** and type the file name **Field Trip Notice**, then click on **Save**



You are going to have *Word* produce one letter for each student in the class. As you can see, the form letter illustrated in Fig. 5.8 reports to parents on a field trip that will be attended by their child. The placeholders (where the field names are enclosed by the << >> symbols) indicate the location in the form letter where data from the FieldTrip Data Source document will be merged when the letters are actually printed out using the Merge to Printer feature of *Word*.

### Inserting the date

You need to put the date at the top of your letter, after the first address.

Start by clicking to position the cursor on the **blank line** immediately **after** the **address** at the top of the page

You learned in Lesson 1 that you can have Microsoft *Word* fill in the date for you, assuming the date in your computer is correct. You have two possibilities here.

- If you are working at a networked computer in a lab at your school, the odds are the date and time are correct so...

From the **Insert** menu select **Date and Time...** then select in the scroll box whichever **date format** you prefer and click on **OK**

Now skip the next several directions and proceed directly to the next page to the sub-section titled **Inserting fields (placeholders)**

- If you are working on a standalone computer (not networked) at your home, say, the date and time settings may well need to be corrected. You should be able to check this easily enough if you have access to the Date/Time functions on your Windows computer.

Click on the **Start** button in the lower left corner of the screen, then select the **Settings...** button, and in the **Settings** submenu click on **Control Panel**

In the **Control Panel** locate the icon for **Date/Time** and double click on it to open it

You should see the Date/Time Properties dialog box on the screen (Fig. 5.9).

If this dialog box does not show up on your screen it may well be because you are working in a protected environment such as a networked lab, in which case your date and time are probably set correctly anyway.

Check to see that the **Date** and the **Time** settings are correct in the dialog box

Notice that you can select the time zone, too. This is naturally important. Windows will automatically adjust the time depending on which time zone you select as yours.

If necessary, make any corrections to the **Month**, **Day**, or **Year** and to the **Time of day** (Fig. 5.9)

Click on **OK** when you are satisfied that that everything is squared away

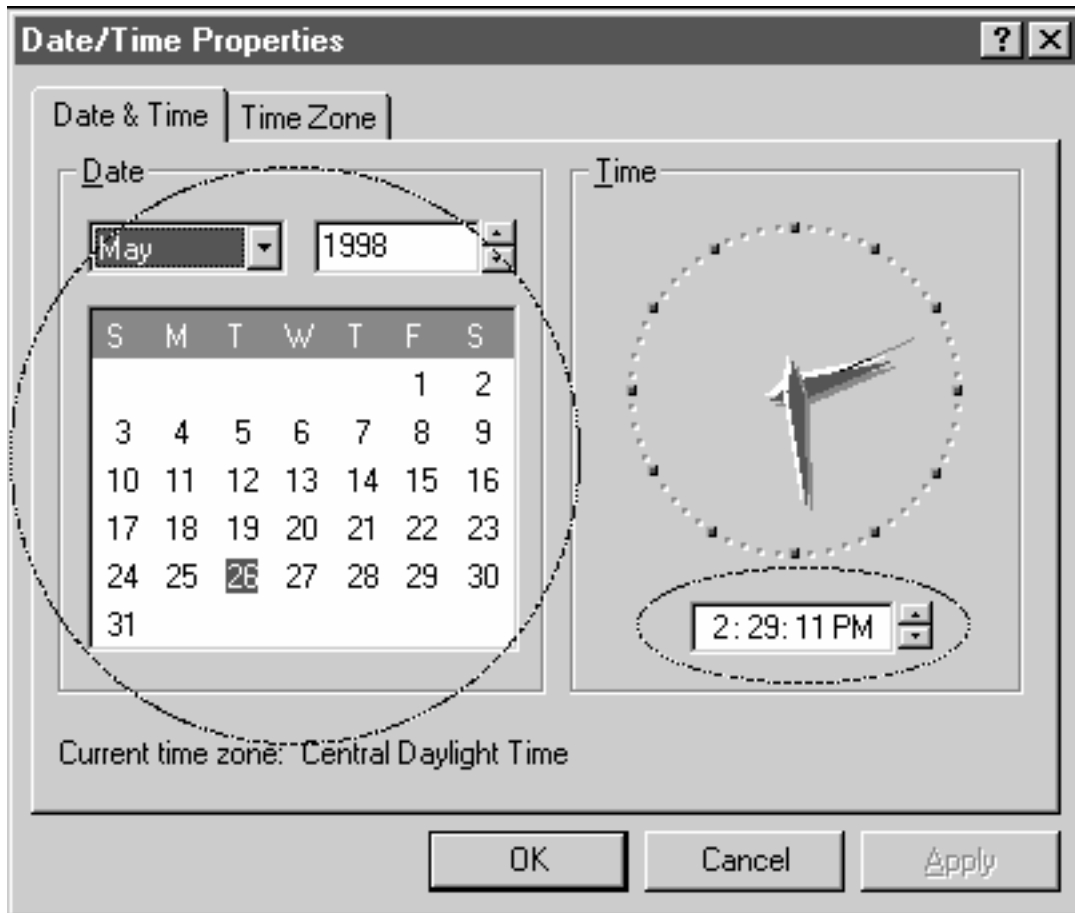


Fig. 5.9 The Date/Time dialog box

### Inserting fields (placeholders)

You are now going to insert the first set of placeholders which will tell *Word* to merge the receiver's name and address with the form letter.

For each of the lines of the receiving address (starting with the **Home Contact** field) you will tell *Word* to merge the form letter with the corresponding data from the FieldTrip Data Source document. Here is how you do this.

Position the insertion point cursor on the empty line **before** the salutation: "**Dear**" and press **Enter** to space down one line

Select **Insert Merge Field** from the left side of the **Mail Merge toolbar** (see Fig. 5.7) then, in the pop up menu, select the field **HomeContact**

Immediately *Word* displays <<Home Contact>> in the letter at the cursor. This tells you that when the letters (all five of them) are printed out, the correct name of each student's parent or guardian will be copied from the FieldTrip Data Source document and inserted into this position in the letter.

Press the **Enter** key to move to a new line

Select **Insert Merge Field** from the **Mail Merge toolbar** once again and, in the pop up menu, select the field **Address1**

*Word* adds the new merge field to the address.

Press the **Enter** key to move to a new line, select the **City** field from the **Insert Merge Field** scroll box

Now **stay on the same line**, and type a **comma (,)** followed by a **space**

Select the **State** field from the **Insert Merge Field** menu, stay on the same line again, hit the **space bar once**, then select the **PostalCode** field from the **Insert Merge Field** menu to round off the address that is to be merged with the letters

Press the **Enter** key to space down after the address

Next you need to put a placeholder for the **Home Contact** after the salutation **Dear..** at the beginning of the letter.

Put the cursor *right after* the word **Dear**, then press the **Space bar**

Now select the **HomeContact** field from the **Insert Merge Field** scroll box, and type a **colon (:)**

By now you should be getting the idea of how to insert merge data into the Field Trip Notice as you go along.

Carry on now until you have typed in the **entire notice** illustrated in Fig. 5.8 a couple of pages back, including all the paragraphs--remember to put a **space before and/or after each Placeholder** so that the data will be spaced sensibly in the final version of the letter

When you have finished, don't forget to **save** the form letter (Field Trip Notice) before proceeding with the tutorial

### **A summary of the Microsoft Word Mail Merge features**

Now the customized form letter is ready to be merged with the full set of records in the FieldTrip Data Source document. Before you produce the set of printed form letters, it will be useful to review the full set of features involved in the Mail Merge facility, and see how the form letter you have just prepared takes advantage of most of them.

- You don't have to use the fields in the same order they appear in the Insert Merge Field menu.
- You can put more than one field in a line or in a paragraph, and you can mix punctuation or other words or characters in amongst the fields. You put City,

State, and Zip on the same line, and you inserted a comma between the City and State fields.

- You can repeat the use of a field in a document. You put this feature into effect when you repeated the HomeContact field, once at the beginning of the receiver's address, and again in the salutation. You also repeated the First Name field several times.
- You can put together an entire document containing only fields. You don't have to include any text other than the contents (numbers, words, phrases, sentences, and so on) of the fields. It all depends on what you want to do.

You can see how the data will look when it is merged with your merge document by clicking on the *View Merge Data* button in the Mail Merge toolbar (Fig. 5.10). This button has ABC on it.

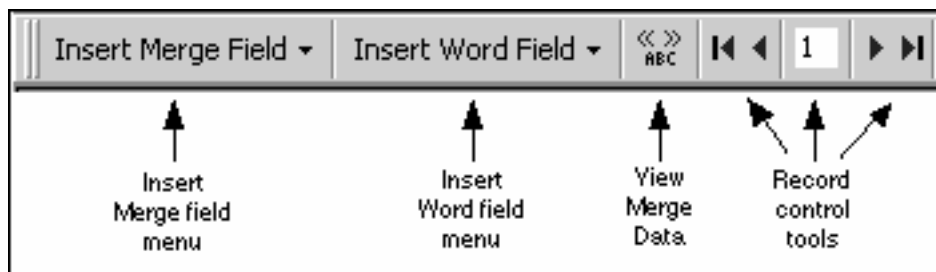


Fig. 5.10 The View Merge Data button and Record control tools

Try this now by clicking on the **View Merge Data** button, then use the **Record** control tools (see Fig. 5.10) to toggle through the five letters to see how the data is inserted by *Word* into each one

## 5.4 PRINTING THE FIELD TRIP NOTICE

Time for Step 3 of the process of merging data for the form letter. This is where all your hard work pays off. You have created your Data Source document. You have prepared the form letter (Field Trip Notice) with which the records will be merged. In the process, you set the placeholders which show the location of the data that will be inserted from the FieldTrip Data Source document into each Field Trip notice when they are printed.

*Word* can now swing into action. Remember: When you want to print a merge document such as the Field Trip Notice you must have in memory not only the merge document, but also the Data Source document that contains the data you will need for the merge document. Hence, for our exercise you must have the **FieldTrip** Data Source document in memory along with the **Field Trip Notice**.

Make sure you have these two files (**FieldTrip** and **Field Trip Notice**) in memory now (check the **Window** menu to do this); if either is not there, open them from the **Mergedocs** folder on the **WorkDisk** before continuing with the tutorial

In the **Window** menu select the **Field Trip Notice** document to make it the active document on the screen

Here now are the steps to print the customized form letters.

You may have the Mail Merge Helper dialog box on your screen, so if necessary, click on **Cancel** in the **Mail Merge Helper** dialog box to cancel the Mail Merge wizard, since you are going to manage fine without it

Click on the **Merge to Printer** button in the **Mail Merge toolbar** (Fig. 5.11)

*Word* will display the **Print** dialog box.

Click on **OK**, then watch (or get on with some other job) while the printer runs off five customized letters, one for each of the students in the class

**Close** the **Field Trip Notice** document when you are done printing

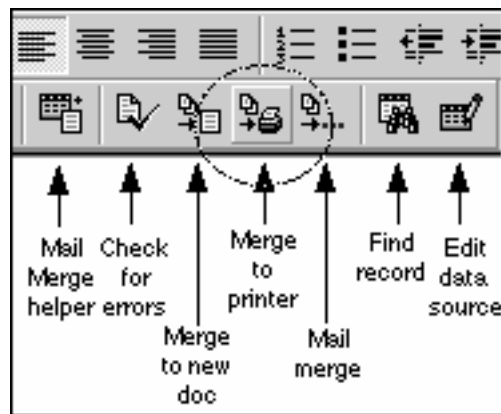


Fig. 5.11 The Merge to Printer button in the Mail Merge toolbar

### *Pause for thought*

Mail merge is a powerful productivity tool. It takes planning, and a certain amount of work up front (which gets easier the more you do it), but it is obviously quicker than writing individual letters to the parents of a class of students.

The more students you have in a class, the greater the productivity gain (but this is no argument for large class sizes!). The personalization made possible by Mail Merge also means you can have a stronger impact than if you sent a general letter.

And don't forget that you can have your students help you plan and produce form letters, even when the contents may eventually contain privileged information. The tough part of the Mail Merge task is assembling the data, and mapping out the letter with which the data will be merged. Running off the letter takes little effort on your part.

When confidentiality is important you can do this when the students are not around. However, as a rule it is to everyone's advantage when you can involve students in such tasks. It develops their sense of responsibility and increases their awareness that they are part of the process of education--not just victims of it!

## 5.5 PREPARING MAILING LABELS

Mailing labels are those address stickers that you often find on mass-mailed items that you receive in the mail. Producing them is simple enough, especially if you have completed all the tutorials up to this point.

### Deciding on the data for the mailing label

Since *Word MergeDocs*, such as mailing labels, are always linked to a Data Source document, you must have the FieldTrip Data Source document in memory before you can create the mailing label merge document. This document should still be on your screen from the previous exercise.

Check the index in the **Window** menu again to confirm that the **FieldTrip Data Source** document is indeed still in memory

Mailing labels come in all shapes and sizes, and it would be counter-productive to try to address all possibilities in this tutorial. Hence, for the sake of convenience, we will assume that you would use 8 1/2" by 11" mailing label sheets with the Avery standard 2160-mini address. Microsoft *Office 2000* has many built-in templates.

### Setting up the mailing labels

You'll need the Mail Merge Helper to build your mailing labels.

From the **Tools** menu select **Mail Merge...** to bring up the **Mail Merge Helper** dialog box

*Step 1: Selecting the type of document you want to create*

Now, in the **Mail Merge Helper** dialog box click on the **Create** button and then click on **Mailing Labels...** in the drop down list (Fig. 5.12)

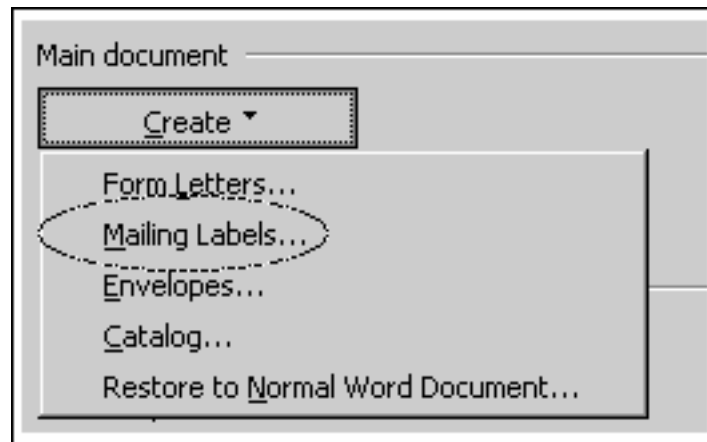


Fig. 5.12 The Mailing Labels Main document

Now you want to create a new Main (Mailing Labels) document (Fig. 5.13).

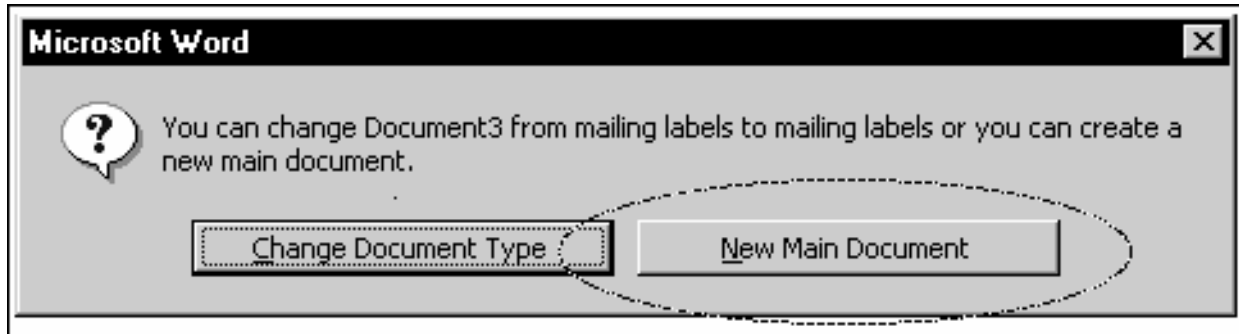


Fig. 5.13 New Main Document Option dialog box

Click on the **New Main Document** button

*Step 2: Selecting the data source document*

Next, *Word* needs to know which Data Source document you intend to use for the mailing labels merge document. The Data Source document will be the same one you created for the Field Trip Notice in the previous exercise, and this FieldTrip Data Source document is still in memory.

Click on **Get Data...**, then click on **Open Data Source...**, and double click on **FieldTrip** in the **Open** dialog box to tell *Word* this is the Data Source document for the mail merge

Next you will be prompted to set up the new main document (Fig. 5.14).

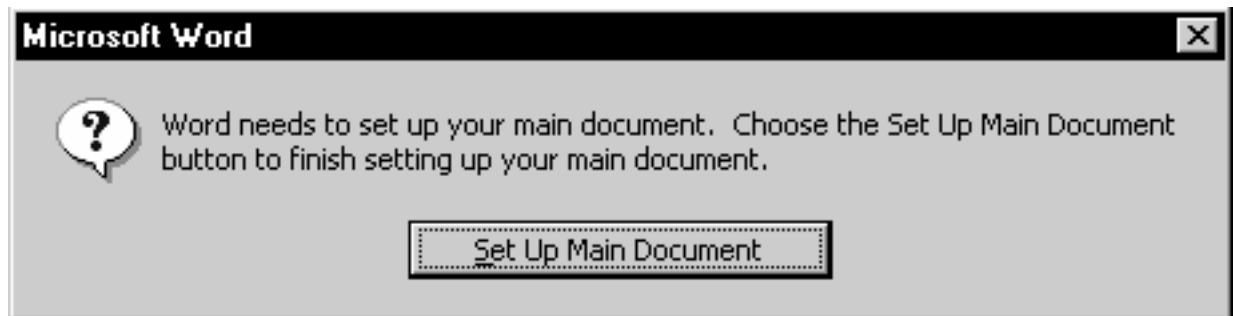


Fig. 5.14 Set Up Main Document dialog box

Click on **Set Up Main Document**

*Step 3: Selecting mailing label options*

In the next dialog box, the Label Options dialog box (Fig. 5.15), you are asked to select the type of mailing label for this application as well the printer options.

Make sure the **Tray** option is **Default Tray (Automatically Select)**, and that the **Label products** is **Avery Standard--2160 mini - Address**

You need to specify how many mailing labels you want to print per sheet, and to do that you need to click on the *Details...* button in the Label Options dialog box (Fig. 5.15).

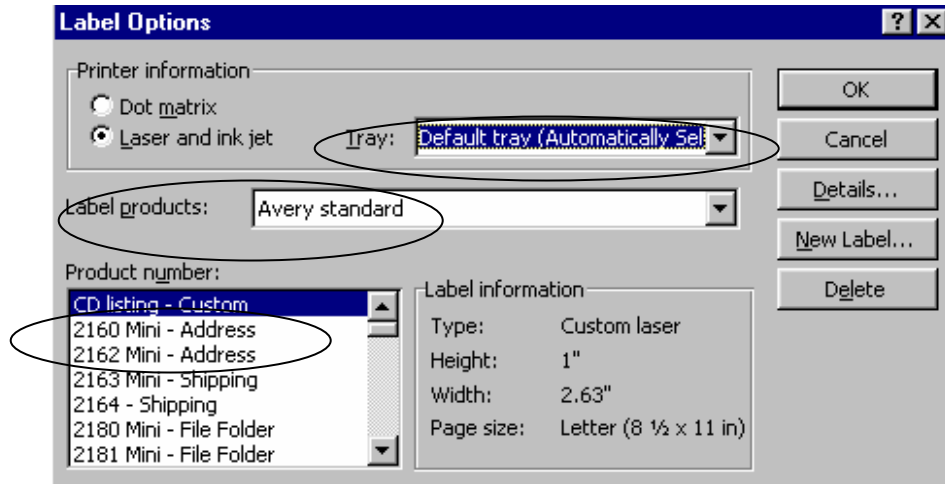


Fig. 5.15 The Label Options dialog box

In the **Label Options** dialog box click on the **Details...** button now

As illustrated in Fig. 5.16, you can now make adjustments to the settings which determine the top and side margins for the mailing label sheet, as well as the number of labels in each of how many columns and so forth.



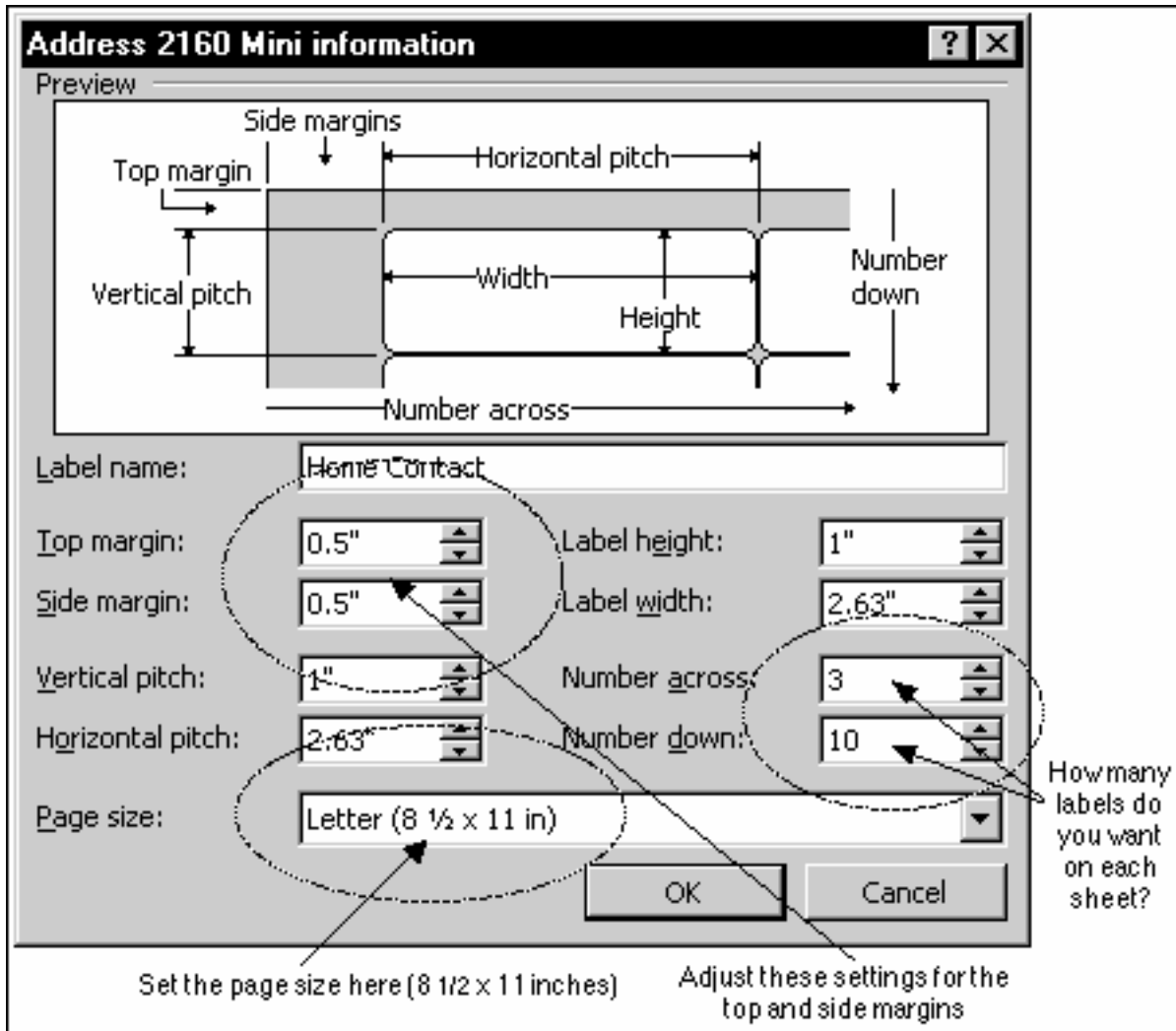


Fig. 5.16 Dialog box to fine tune the mailing labels

**Set the Page size to Letter (8 1/2 by 11 inches)**

You want to fit three labels across the page, so change the **Side margin** setting to **0.5"** and leave the **Top margin** as is

Set the **Number** of labels **across** at **3**, and the **Number** of labels **down** at **10**

Finally, type **Home Contact** in the **Label Name:** data entry box, then click on **OK** to accept these new settings

Now click on **OK** in the **Label Options** dialog box to complete your selection of all these mailing label options

*Step 4: Designing the layout of the mailing label*

Your last task is to design the actual mailing label by telling *Word* which fields you want in the mailing label and where you want them placed. Fig. 5.17 illustrates how this dialog box will look when you are done with this step.

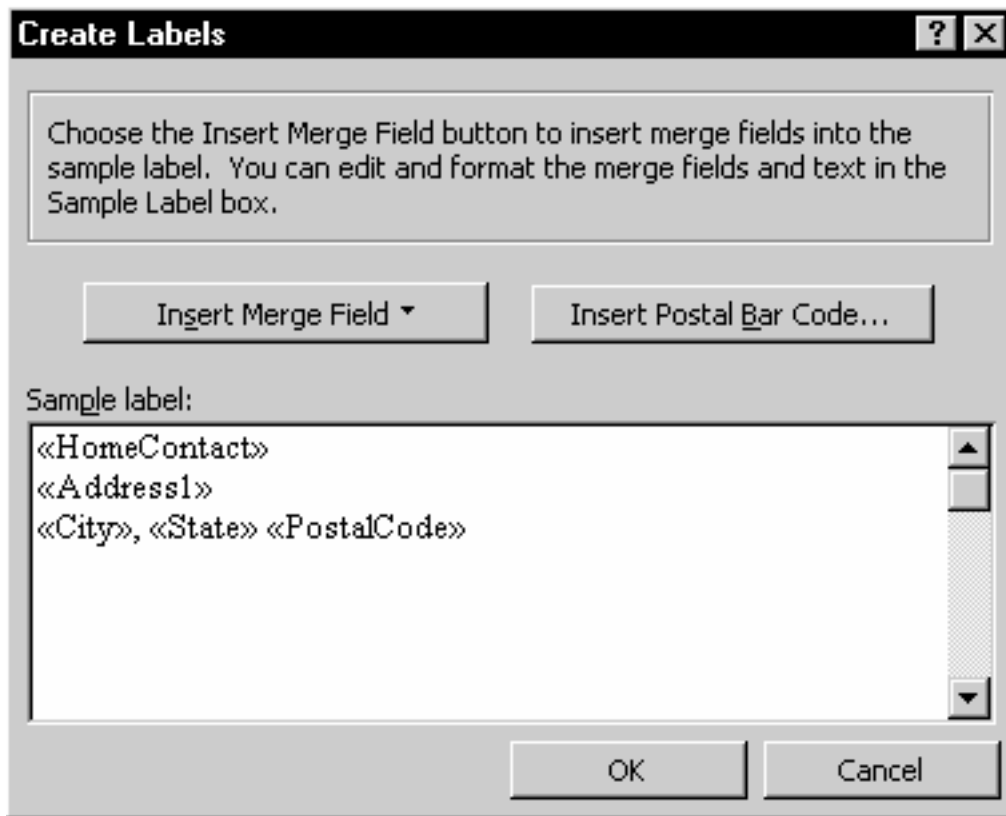


Fig. 5.17 The Create Labels dialog box

Click on the **Insert Merge Field** button in the **Create Labels** dialog box to see the drop down list of fields in the FieldTrip Data Source document

Select the **HomeContact** field for the first line of the address, then hit **Enter**

Next select the field **Address1** and hit **Enter**

Then select the **City** field, type a **comma (,)**, press the **space bar** once, select the **State** field, press the **space bar** once, and last select the **PostalCode** field, then click on **OK**

The mailing labels are ready for printing.

Since you want to save the mailing label document for future use, click on the **Close** button of the **Mail Merge Helper** dialog box

Next use **Save As** to save the **Mailing Labels** merge document with the name **Contact Mailing Labels**

Now click on the **Merge to Printer** button in the **Mail Merge toolbar** (Fig. 5.18), then click on **OK** to print the mailing labels

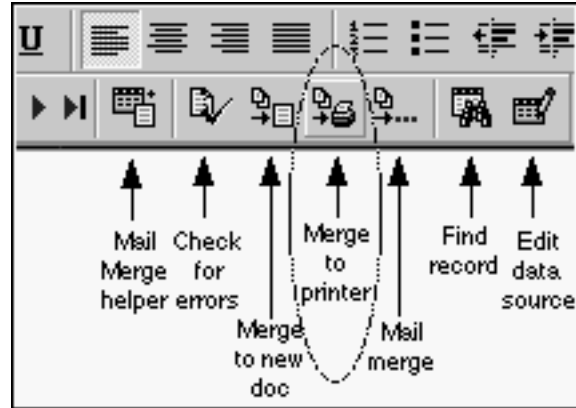


Fig. 5.18 The Merge to printer icon

## 5.6 PREPARING A NEW MERGE DOCUMENT USING AN EXISTING DATA SOURCE DOCUMENT

On your WorkDisk is a Data Source document called *Roster*, and it is a set of records for a sample class of just 5 students. The data in each record will enable you to prepare a merge document which will report to parents or guardians on their child's progress-to-date half way through a semester.

You are going to prepare the merge document and merge it with the *Roster* Data Source document.

Close all the files that are currently open (there's no need to save them)

Double click on the **File** menu to show all the available options in the menu and select **New...**, then click on **OK** to open a new **Blank Document**

From the **File** menu select **Save As**, give the new document the name **LettersTmp**, select the **A:** drive in the dialog box, and click on **Save**

From the **Tools** menu select **Mail Merge...**

In the **Mail Merge Helper** dialog box click on **Create** (Step 1), then select **Form Letters...** from the drop down list and click on the **Active Window** button as the location of the merge document (this is the new *LettersTmp* document you just opened)

Click on the **Get Data** button (Step 2), then select **Open Data Source...** from the drop down list

*Word* now displays the Open dialog box.

Select the floppy disk drive (drive **A:**), which should have in it your **WorkDisk**, open the **MergeDocs** folder, and then **Open** the **Roster** Data Source document

*Word* now informs you that you have no merge fields in your main document (*LettersTmp*). No problem. This is your cue to go ahead and prepare the merge document by editing the new *LettersTmp* document you opened just now.

Click on the **Edit Main Document** button in the dialog box

*Word* now clears the Mail Merge Helper dialog box off the screen and brings up the Active Window containing the *LettersTmp* document.

### Macros

It is time to learn about macros.<sup>1</sup> A macro is a simple command to a computer that calls on a pre-specified sequence of instructions or keystrokes using just a single keyboard command. Think of a macro as a small program. You can use Microsoft *Office 2000* to create your own macros and they can save you a lot of time.

#### *Creating the macro*

You are going to create a template for your personal or professional correspondence. The process of creating the macro will help you understand the concept of macros in general. The macro you are going to create and place in the Standard toolbar will tell the computer to write your address in any Microsoft *Word* document whenever you click on the macro button.

Here are the steps to create the macro.

The insertion point cursor should be at the beginning of the first line at the top of the blank *LettersTmp* document.

Double click on the **Tools** menu to show all the available options and select **Macro**, then in the sub menu select **Record New Macro**

*Word* now displays the Record Macro dialog box (Fig. 5.19).

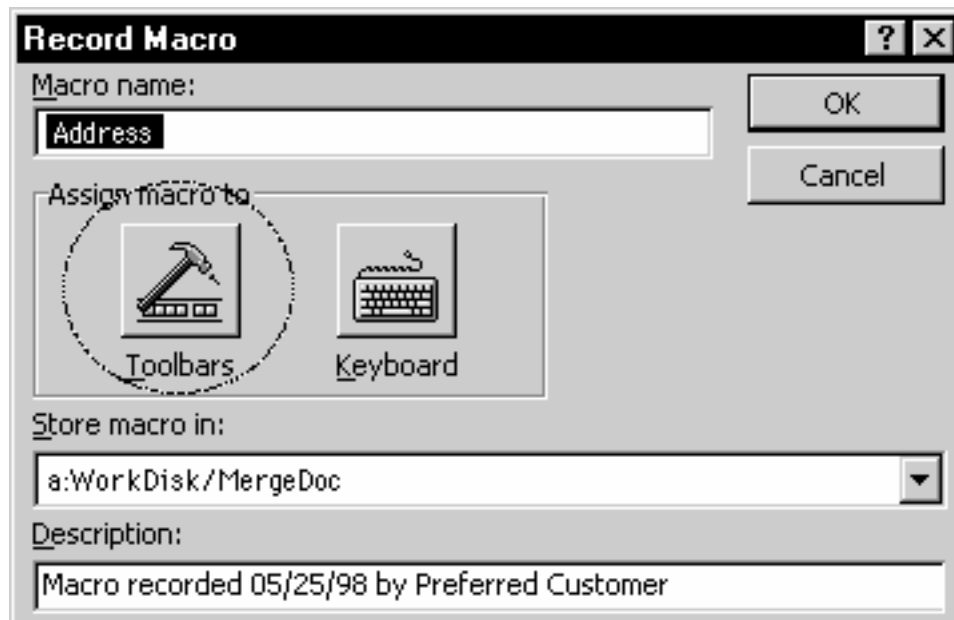


Fig. 5.19 Record Macros dialog box

Type **Address** as the macro's name

<sup>1</sup> As used here, the term is pure computerese!

In the **Assign macro to** section of the dialog box click on the **Toolbars** icon (see Fig. 5.19)

*Word* now brings up the *Customize* dialog box so you can customize a toolbar

Drag the icon in the **Commands:** box (Fig. 5.20) up to the **Standard toolbar** and drop it there (be sure to drop it on the toolbar, in amongst the other tools, not in the plain gray area to the right of it)

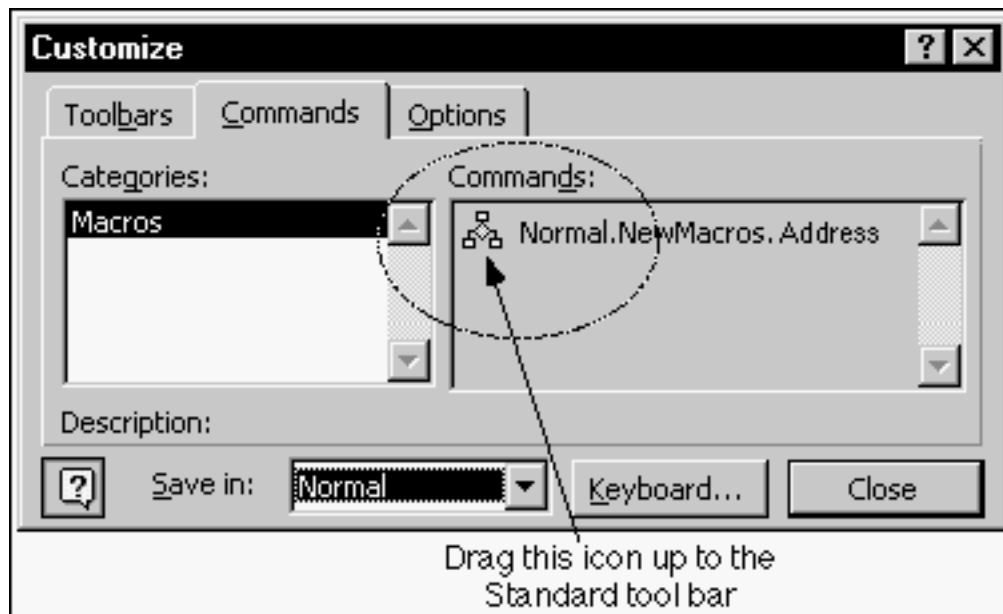


Fig. 5.20 The Customize dialog box

The macro doesn't look too impressive as a bunch of words in the toolbar, but never fear... help is near. You can convert those words to an icon that looks more like a tool. In fact you can customize the look of most all of the tools in the toolbars if you want to. Here's how you do this.

Right click on the macro (**Normal.NewMacros.Address**) in the toolbar

This brings up a menu of macro button styles.

Select **Default Styles...** from the drop down menu and notice the button that appears in place of the words in the toolbar

That's better. Now the macro looks more like a tool. This will allow you to easily use the macro anytime you are working on a *Word* document.

Now click on **Close** in the **Customize** dialog box

Once you have dragged the icon to the toolbar, *Word* immediately puts a small macro control dialog box in the top left corner of the *Word* window (Fig. 5.21) which you will use to stop or pause the recording of your actions as you proceed.

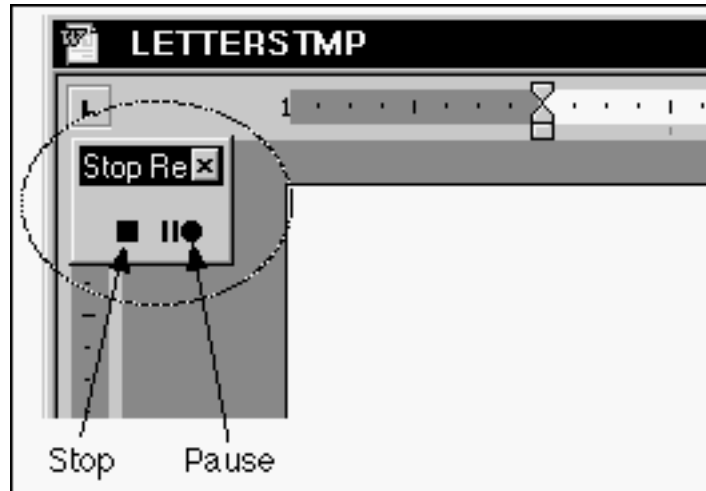


Fig. 5.21 Stop Recording macro control dialog box

Everything you do from now on will be recorded by the *Word* macro builder, so you need to follow the ensuing directions very carefully.

Type the lines of either your personal address or your school address at the top of the letter

Remember, *Word* is recording everything you are doing at the computer...

When you have finished typing the address, press **Enter** after the last line so the cursor is positioned at the beginning of the empty line after the address

From the **Insert** menu select **Data and Time...**, then in the **Date/Time** dialog box **double click** to select the **date format** of your choice

Hit the **Enter** key **twice** then type the salutation **Dear** and hit the **Enter** key **four** times

Type **Yours sincerely** and hit the **Enter** key **four** times again

Type your own **first name and last name**, press the **Enter** key **once**, then type your **title**, if you have one (like 6th Grade teacher, or Superintendent)

Finally, click on the **Stop** button in the **Macro control** dialog box (Fig. 5.21)

Now relax; you are off the hook! Think about what you have just done: you have created a macro which will allow you to enter your address and the date and the basic outline for a letter anywhere you like in a *Word* document just by clicking on the *Address* macro button you put in the Standard toolbar. The macro will only work when you are using Microsoft *Word*, of course.

#### *Using the macro*

Follow these steps to practice using the macro.

In the **Edit** menu use **Select All** to highlight all of the **data** you just entered into the **LettersTmp** document

Clear the document of all the data by pressing the **Backspace** key

The insertion point cursor should still be at the top of the page.

Click on the **Address** macro button in the **Standard** toolbar

...and watch as the macro goes to work, duplicating everything you told it to do. If you made a mistake and corrected it as you went along, notice how *Word* recorded that, too! Macros are very easy to create and you could probably come up with some very useful ones of your own.

You have just created a macro which will produce a template for your personal or professional correspondence. You should keep this handy for future use!

### **Renaming the Letter template and creating the merge document**

Next you are going to use this template (still on the screen and also saved on your disk) to create the *MidTerm* report which will go out to the parents of your students.

First you must change the name of the file. Recall that this will create a copy of the template with a different name, thus preserving the *LettersTmp* document unchanged for future use.

Select **Save As** and **change the name** of the template to **MidTerm** (this will be the name of the merge document)

You are going to have *Word* produce one letter for each student in the class. As you can see, the form letter illustrated in Fig. 5.22 reports to parents on how well their child is doing half way through the semester.

The placeholders (where the field names are enclosed by the << >> symbols) indicate the location in the form letter where data from the Roster Data Source document will be merged when the letters are actually printed out using the Merge to Printer feature of *Word*.

All that remains is for you to type the letter as it is illustrated in Fig. 5.22, except that you will have *your* address and *today's* date at the top of the report and *your* name and title at the bottom. Wherever you see a placeholder (<< >>), use the *Insert Merge Field* button in the Mail Merge toolbar to place the indicated field at the appropriate point in the report.

You already completed a similar exercise earlier in this lesson. You might like to check back at what you did (page 133, 5.3 Creating the merge document (the field trip report)) if you are still unsure about what to do.

**Save the MidTerm** document before proceeding with the next exercise

### **Pasting a chart into the letter**

The letter needs one final touch. You are going to put a chart in the Mid Term Report. You will create the chart in an *Excel* spreadsheet, then copy it into the Mid Term Report. It's easy enough to do.

Open the **Excel** spreadsheet program from the **programs** menu on your desktop

```

Appleby Elementary School
Bourton-on-the-Water, WY 34251
9/21/98

<<HomeContact>>
<<Address1>>
<<City>>, <<State>> <<PostalCode>>

Dear <<HomeContact>>:

As you know, I am <<FirstName>>'s home room teacher this year. You will
be pleased to know that the class has settled down well, and the children
are making excellent progress on the whole.

I am writing to report to you about <<FirstName>>'s participation in school
this first half of the current session. I'm sure you appreciate how
important it is for you to be aware of where your child stands, especially
in regards to class grades and attendance.

<<FirstName>>'s current grade is <<Grade>>. <<FirstName>> has missed <<ATD
days so far this session, which is <<Comment>>.

Please feel free to call me anytime to arrange a conference, especially if
the grade or attendance data in the previous paragraph are not what you
expected.

I can be contacted at school between the hours of 7:30 am and 4:00 pm,
Monday through Friday. My extension is 1234.

Yours very sincerely,

Val Ferreti
Theater Director

```

Fig. 5.22 The merge document

In the Mergedocs folder on your WorkDisk you should find an *Excel* spreadsheet called Charts.

From the *Excel* **File** menu select **Open**, then from the **Mergedocs** folder on your **WorkDisk** open the **Charts Excel** document

You are going to quickly create a chart based on the data in the spreadsheet. This will be useful reinforcement of what you learned in Lesson 5. Here are the steps.

Highlight cells **A2** through **B6** (the data that will be represented in the chart), then click on the **Chart Wizard** icon in the **Standard** toolbar (it looks like a bar chart)



In the **Chart Wizard** dialog box select the **Pie** chart option in the **Chart type:** scroll box, then select the **Chart sub-type** for “**Exploded pie with a 3-D visual effect**” (Fig. 5.23)

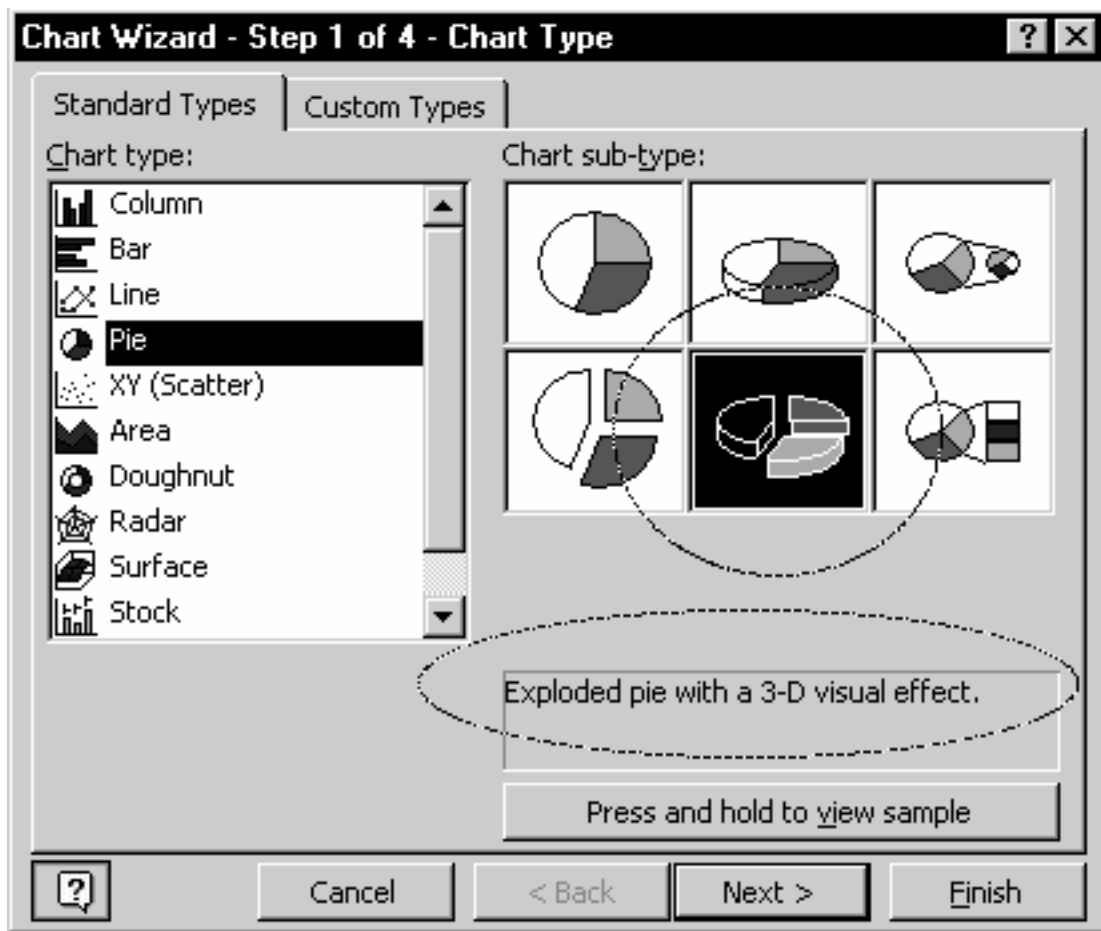


Fig. 5.23 Chart Wizard dialog box

Click on **Next** to proceed to Step 2 of the Chart Wizard

There is nothing to change in Step 2 since you have already selected the set of data for the chart.

Click on **Next** again, and in the dialog box for Step 3, in the **Chart Title:** data entry box, type **First Quarter Grades** and click on **Next**

Finally, accept the default to save the chart as an **object in** the worksheet (Sheet1), and click on **Finish**

*Excel* assembles the chart and displays it on the screen (you should see the small black handles around the chart indicating that it is a selected object).

**Save** the spreadsheet file with the chart embedded in it

The chart is thus now built into the spreadsheet document, available to you as a template when next you need to produce a summary of your students' grades. If you change the data in the cells (A2 through B6) the chart will automatically be updated.

Make sure that you still see the **handles** around the chart--if not, click on the chart to **select** it

Press **ctrl-C** to copy the chart to the clipboard, then switch back to *Word* (by clicking on the *Word Midterm* button in the **Task Bar** at the bottom of the screen) and use the **Window** menu to select the **MidTerm** document if it is not already the active window on the screen

Use the mouse to put the cursor on the empty line **after** the paragraph that ends "**...in regards to class grades and attendance.**"

Press **Enter** just once, then click on the **Center** icon in the **Format** toolbar (this will center the chart when you paste it from the clipboard)

Press **ctrl-V** to paste the chart into the **MidTerm** document

Press **Enter** once more and, before going on, **Save** the **Mid Term** document (it will be saved, as before, in the **Mergedocs** folder on your **Work Disk**)

Double click on the **File** menu to show the full list of File menu options and select **Print Preview** to see how the report looks

If the letter goes over onto a second page this is no problem, but you may like to try these alterations if you want to fit it onto one side of the printed page:

- Remove any unnecessary empty lines between the addresses at the top, or between the sign off lines at the end. There need be only one empty line between the addresses, and before the salutation (Dear...). And you only need a couple of lines for the signature after the concluding greeting (Yours sincerely...).
- You could try reducing the size of the font from 12 to 10 pt (choose Select All from the Edit menu to do this), and change the font from Geneva to Helvetica.
- You also can reduce the size of the chart. Click on the chart, and notice the handles at the corners. Grab the handle in the lower right corner with the mouse and hold down the shift key while you drag up and left to proportionally reduce the chart's dimensions. If you reduce it too much, however, you might spoil the appearance, so be careful with this option.

## 5.7 BACKING UP YOUR DATA

Your last task before completing this session at the computer is to make a backup of your Mergedocs files on your backup disk. All the files you have created are saved in the MergeDocs folder on your *WorkDisk* disk, which is in the disk drive.

Close the **Word** word processing program and the **Excel** spreadsheet program

**Close** or **minimize** any other windows that may be open on your desktop to make it easier for you to see what you're doing

Double click to open the **My Computer** icon, then double click on **3 1/2 floppy A:**

Now drag the folder **MergeDocs** folder from your **WorkDisk** disk to the Desktop and drop it there

Watch while Windows makes a copy of your files on to the desktop, then close the Window on your **WorkDisk** disk

Remove your **WorkDisk** disk from the disk drive, replace it with your **WorkDiskBkp** disk and double click on **3 1/2 floppy A:**

Now drag the **MergeDocs** folder from the desktop to your **WorkDiskBkp** disk and click on **Yes** to tell Windows you want to replace the old version of all the files

## LOOKING BACK

This tutorial has involved you in activities that would normally be expected of a sophisticated computer user. This is not to say that you have therefore become an advanced user yourself. Actually, you are the best judge of that, because the term is relative anyway. As the old adage goes, people who think they know everything usually know next to nothing at all; and people who genuinely know a great deal generally recognize that they still have so much to learn.

What is important is that you use the computing skills you have acquired. Only thus can they become second nature, a natural extension of your body and mind, making you more productive, and freeing you from preoccupation with the humdrum daily grind of classroom administration and control.

## LOOKING FORWARD

The remaining lessons in *ESSENTIAL Microsoft Office 2000* will provide you with hands-on experience with the Access database and with the PowerPoint presentation manager. For the former you will create a database from scratch and you will also learn how to work with an existing database for tasks such as searching and report-generation. For the PowerPoint lesson you will prepare an outline and you will work with clip art and other graphics to create slide shows for presentations.

Having worked your way through the lessons to this point, you should be in a position to recognize the value of what you have learned, value both to you and to your students in the context of the classroom and in the context of life in general.

## SKILL CONSOLIDATION

Complete these exercises to reinforce what you learned in Lesson 5.

1. Imagine a scenario where you invite your students (as an assignment, perhaps) to prepare sets of questions for tests based on the material that you have covered in class. Each student types his or her questions into the data source document. You would check the data source document to make sure that each student had completed the assignment. Then you would print a copy of the full set of test questions for every student to use as a study guide. When the date for the test approaches you would simply select out those that you want to use, and print up the test using the pre-prepared test report format.  
Individually or together with a team of your classmates, prepare a data source document to store sets of test questions. Make up a representative set of, say, 20 questions, and store them in the data source document. Prepare a test report format (form letter) to merge with the test question data source document. Use record selection rules to select ten out of the 20 questions. Print out the test (merge to printer).
2. Get together with a group of your classmates or colleagues. Compile a list of suggestions for useful macros to use with Microsoft *Word*--macros like the Address macro that you learned in this tutorial. For example, you could create a macro that types out your letterhead--address, telephone number, and the date, using different fonts and sizes. Create half a dozen macros from the best suggestions.
3. Create a merge document to print a set of continuous index cards cataloging your collection of music. Use the Mailing Labels feature for this purpose. Set up a data source containing a sample set of data for at least 6 records. Each record should have at least 5 fields (CD Title, etc.).
4. Meet together with a group of your fellow students or colleagues, come up with a list of suggestions for useful form letters to be used in a school environment, share out the ideas among the group (a minimum of two each), and create the templates for the form letters. Each person in the group should save a complete set of the form letters on a personal disk.
5. (Idea offered by Susan Brooks) Use Mail Merge to create Mad Libs. These are stories into which you have the computer insert words for certain categories of grammar which make the stories unpredictably funny. The fields in the data source document are like: noun one, noun two, adjective one, adjective two, proper noun, action verb, etc... Then, use a well-known nursery rhyme or poem into which to merge the data. For example, you could use "Mary had a little lamb" or some other nursery thyme or song or poem. Be cautious as to choosing the adjectives and nouns so as not to offend! This is a great exercise to do with kids in school, too.
6. (Idea offered by Susan Brooks) Merge a Mother's Day letter with a data source document (this is a neat mail merge exercise for younger children, though it's fun for all ages). Fields in the data source document should include: age, weight, height, good food, bad food, place, etc. The letter goes something like this:

I love my Mother, She is \_\_\_\_\_ years old. She weighs \_\_\_\_\_ and is \_\_\_\_\_ tall. She is a great cook. The best food she makes is \_\_\_\_\_, but I really don't like it when she makes \_\_\_\_\_. We go places together. The place I had the

most fun at is \_\_\_\_\_. I love it when my mother and I do  
\_\_\_\_\_ together.

You can add things to it if you want. This is just an example.