

7 MAIL MERGE AND RELATED OPERATIONS

Form letters and mailing labels

LEARNING OUTCOMES

In Lesson 6 you were introduced to the *Access 2016* database. In Lesson 7 you are going to apply what you have learned about databases to the task of creating form letters and mailing labels. The process is called Mail Merge and it is an important word processing skill with which every teacher should be familiar.

Microsoft's *Office 2016* is an integrated suite of programs. This means that the different components of the *Office* software—*Word*, *Access*, *Excel*, and *PowerPoint*, for example—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 tools with all the 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*.

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 who receives it.

The first of the 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 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 (an *Access 2016* database) for a form letter;
- create the form letter;
- prepare a set of field trip notices, merging them with the data source document and printing to a printer or to a file;
- prepare mailing labels, and merge them with the data source document;
- prepare a new form letter using an existing data source document (an *Access 2016* database)—including using a macro

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, so if you decide to wander off on your own, be sure you know your way back!

Another word of warning...

This tutorial will cover a lot of ground. If you have worked through the previous six tutorials up to this point, you should have considerable background using Microsoft *Office 2016*. 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 document (an *Access 2016* database), and then merge the data into a *Word* form letter. This form letter 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 form letter using an already existing data source document (another *Access 2016* database).

7.1 GETTING STARTED

Make sure you have the **USB drive** containing your **Work Files for Office 2016** folder in the **USB port**

In the **Work Files for Office 2016 > Miscellaneous Files > Merge Documents** folder, open the **Letters** word processing document

You are now ready to begin work on the form letter you are going to create using *Word's* Mail Merge function, with which will be merged a database of recipients' data. First you need to select the *Word 2016* Mail Merge Wizard, which will step you through the series of processes you need to complete to create and print the form letter.

In the **Mailings Ribbon > Start Mail Merge** group, click on Start Mail Merge to bring down the menu, then select the last option in the menu, **Step by Step Mail Merge Wizard...** (Fig. 7.1)

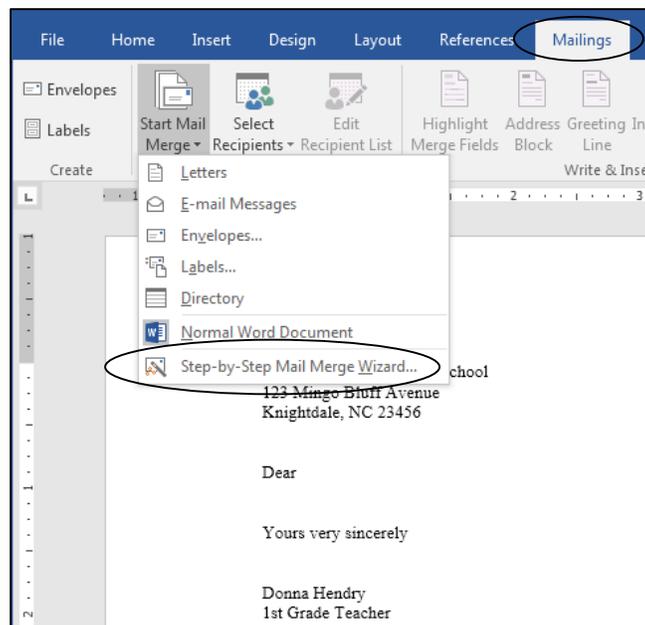


Fig. 7.1 Step by Step Mail Merge Wizard option

This brings up the *Mail Merge Task Pane* dialog box (Fig. 7.2).

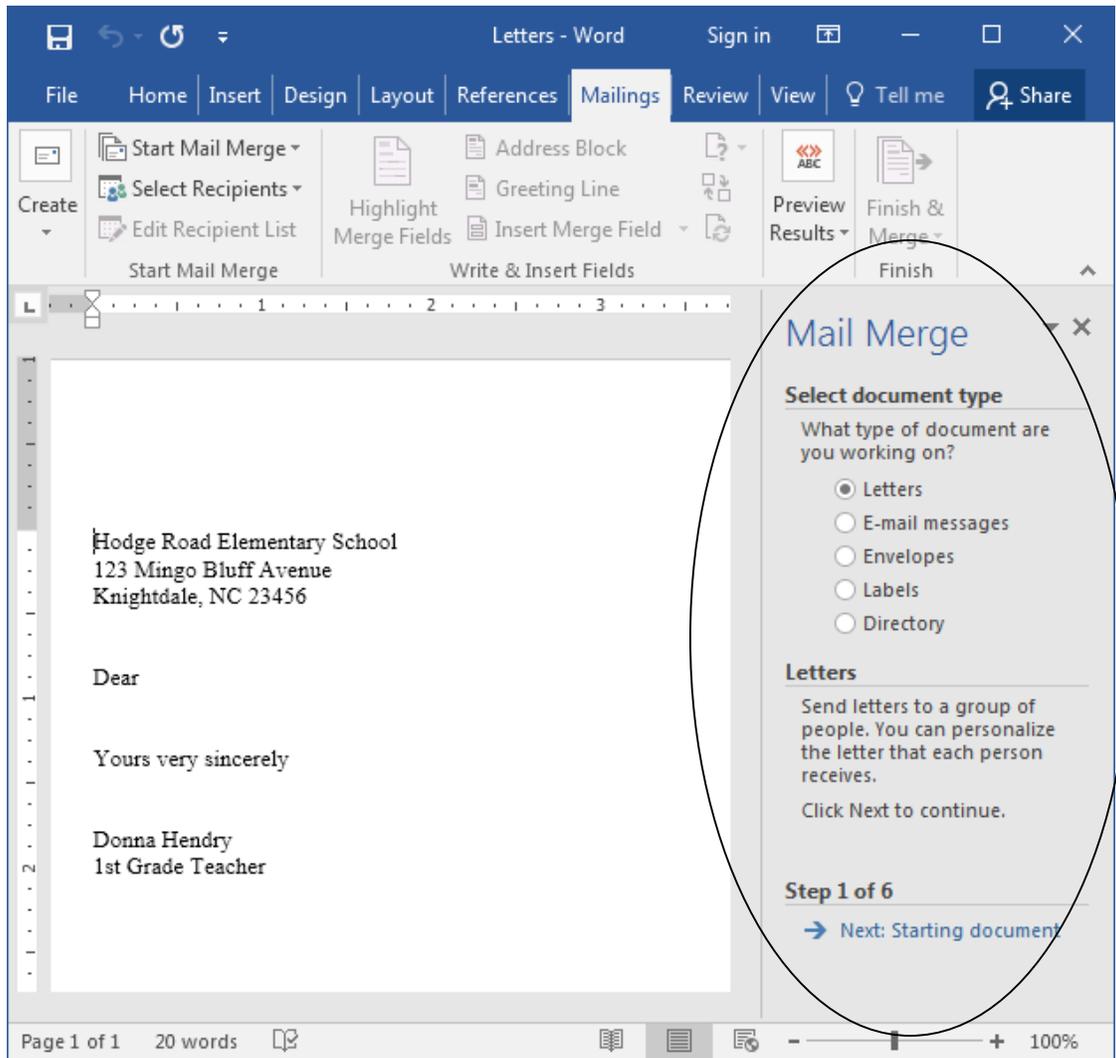


Fig. 7.2 The Mail Merge Task Pane

The process of merging data with a form letter involves the following six steps:

1. Select the document type.
2. Select the starting document.
3. Select the recipients of the form letter.
4. Write your form letter.
5. Preview the merged letters.
6. Complete the mail merge.

The next section will step you through the process of preparing the data source document—an *Access 2016* database (Steps 1-3). Section 7.3 will help you create the form letter (Step 4). This form letter will contain the place holders which eventually will be filled with data from the data source document (an *Access 2016* database). Section 7.4 will take you through Steps 5 and 6—the process of printing the customized letters.

7.2 PREPARING THE ADDRESS LIST DATABASE

You are going to use the features of *Word* Mail Merge to create the database that you will use for this mail merge exercise. However, you could use an existing database for this purpose, and you will have the opportunity to practice doing this later in this lesson.

Before writing the form letter you must create the Address List database of student records that will be merged with the form letter.¹ This involves the first three steps of the Mail Merge Task Pane.

Let's start with Step 1.

Step 1: Select the document type

The Mail Merge Task Pane first asks you to specify the type of main document you will use for the mail merge (in this case a *Letter*).

Make sure the radio button next to **Letters** is selected, then, at the **bottom** of the **Task Pane**, click on **Next: Starting document**

Step 2: Select the starting document

In the **Task Pane** for Step 2, make sure the **radio button** next to **Use the Current Document** is selected, since you are going to use the **Letters.doc** document you opened at the beginning of this lesson

Now, again at the **bottom** of the Task Pane, click on **Next: Select recipients** in order to proceed to **Step 3**

Step 3: Select the recipients of the form letter

The next step (Step 3 of 6 in the Mail Merge Task Pane) helps you decide who will be the recipients of your form letter.

You have not yet created the database that contains these records, so you need to select the option to *Type a new list* (Fig. 7.3).

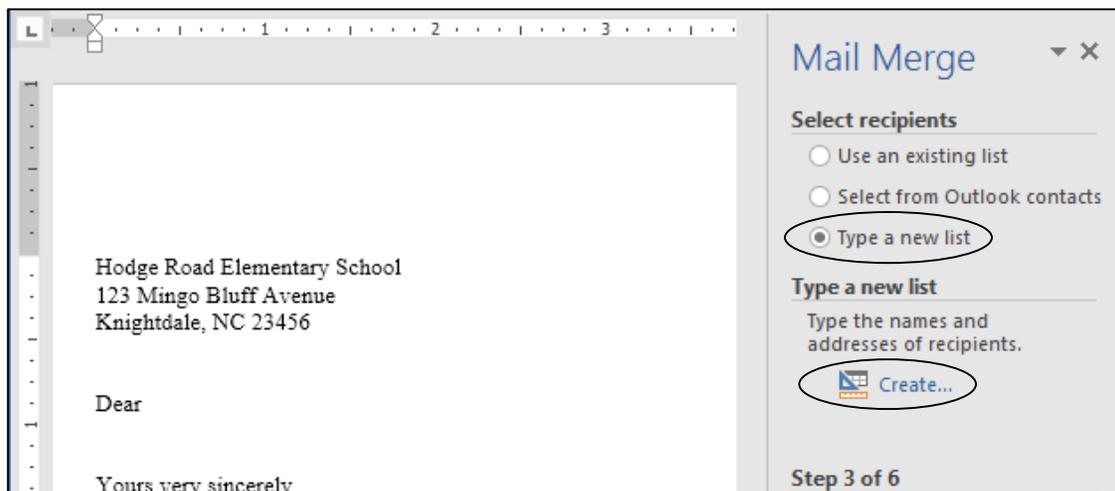


Fig. 7.3 The Task Pane for Step 3 of the Mail Merge Task Pane

¹ 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.

In the **Task Pane**, click on the **radio button** next to **Type a new list** then, in the **Type a new list** section, click on **Create...** (Fig. 7.3 previous page)

This brings up the New Address List dialog box (Fig. 7.4).

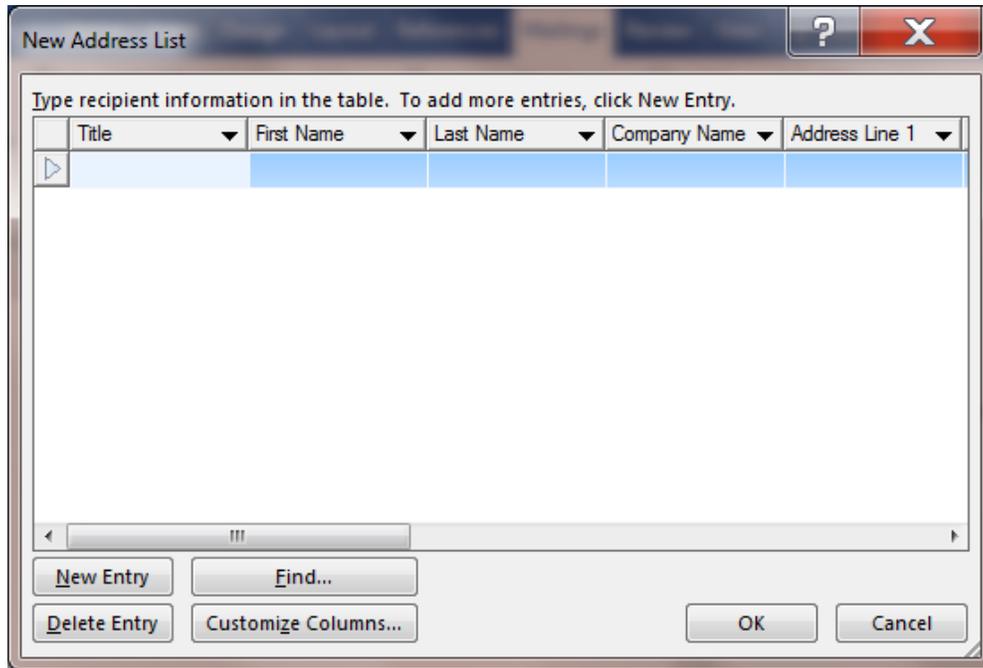


Fig. 7.4 New Address List dialog box

You now have to decide on each of the field names for the set of records you are going to enter into the Address List database. As it happens, almost all of the fields you need are among those already included by default in the *New Address List* dialog box. You can easily add or delete fields from this list by customizing it. Here's how you select the ones you want.

In the **New Address List** dialog box, click on **Customize Columns...** (see Fig. 7.4), which brings up the **Customize Address List** dialog box (Fig. 7.5)

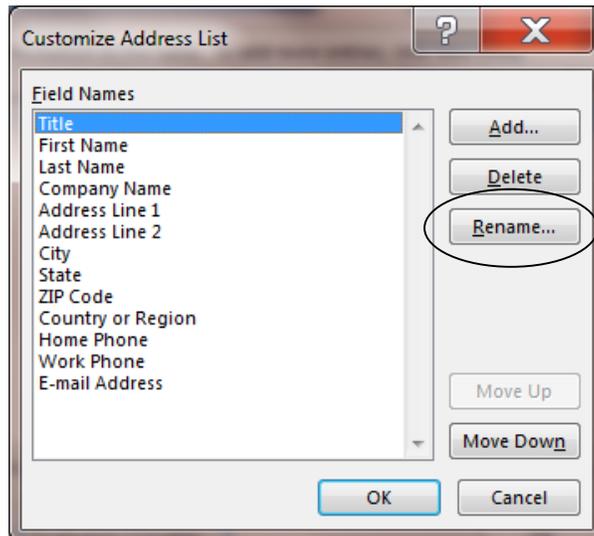


Fig. 7.5 The Customize Address List dialog box

The first field selected is *Title*, which needs to be renamed with the field name *Home Contact*.

Click on the **Rename** button in the **Customize Address List** dialog box and, in the **Rename Field** data entry box (Fig. 7.6), type the name **Home Contact** and click on **OK**

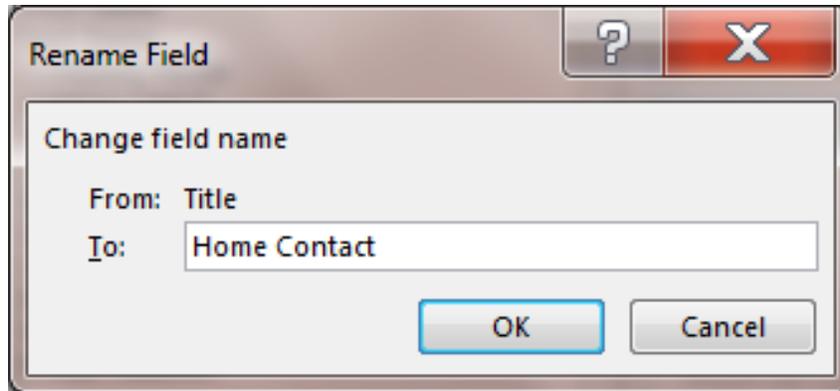


Fig. 7.6 Rename Field dialog box

You want to keep the **First Name** and **Last Name** fields, but you need to change the actual field names for the sake of clarity.

Click on **First Name**, then click on the **Rename** button, and change the field name to **Student First Name**

Do the same for the **Last Name** field, changing the field name to **Student Last Name**

Move down to the next item in the list (**Company Name**, which you don't need in the database) and click on it to select it, hit the **Delete** button, then click on **Yes** when you're prompted to confirm that you really do want to **delete** the Company Name field

Skip down again and remove the **Address Line 2** field name, but keep the **City**, **State**, and **ZIP Code** field names

Next, remove the **Country**, **Home Phone**, **Work Phone** and **E-mail Address** fields, since you won't be needing any of this information for the form letter you are about to create

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

Click on **OK** to accept the newly customized **Address List**

You'll now be returned to the *New Address List* data entry window (illustrated in Fig 7.4 on the previous page) where you'll type in the names and addresses of your students.

Now you are ready to go ahead and enter the data for the first student family name and address.

Go ahead and make up the data for **one complete record—seven (7) fields**, starting with the **Home Contact** field (the Home Contact data is a name like Mr. and Mrs. Doe) and ending with the **ZIP Code** field

Hit the **Tab** key after typing in the **ZIP Code** entry

When you hit *Tab* after typing the ZIP Code entry (the last field in each record), *Access* will automatically start a new record entry form, starting with the Home Contact Field (Fig. 7.7).

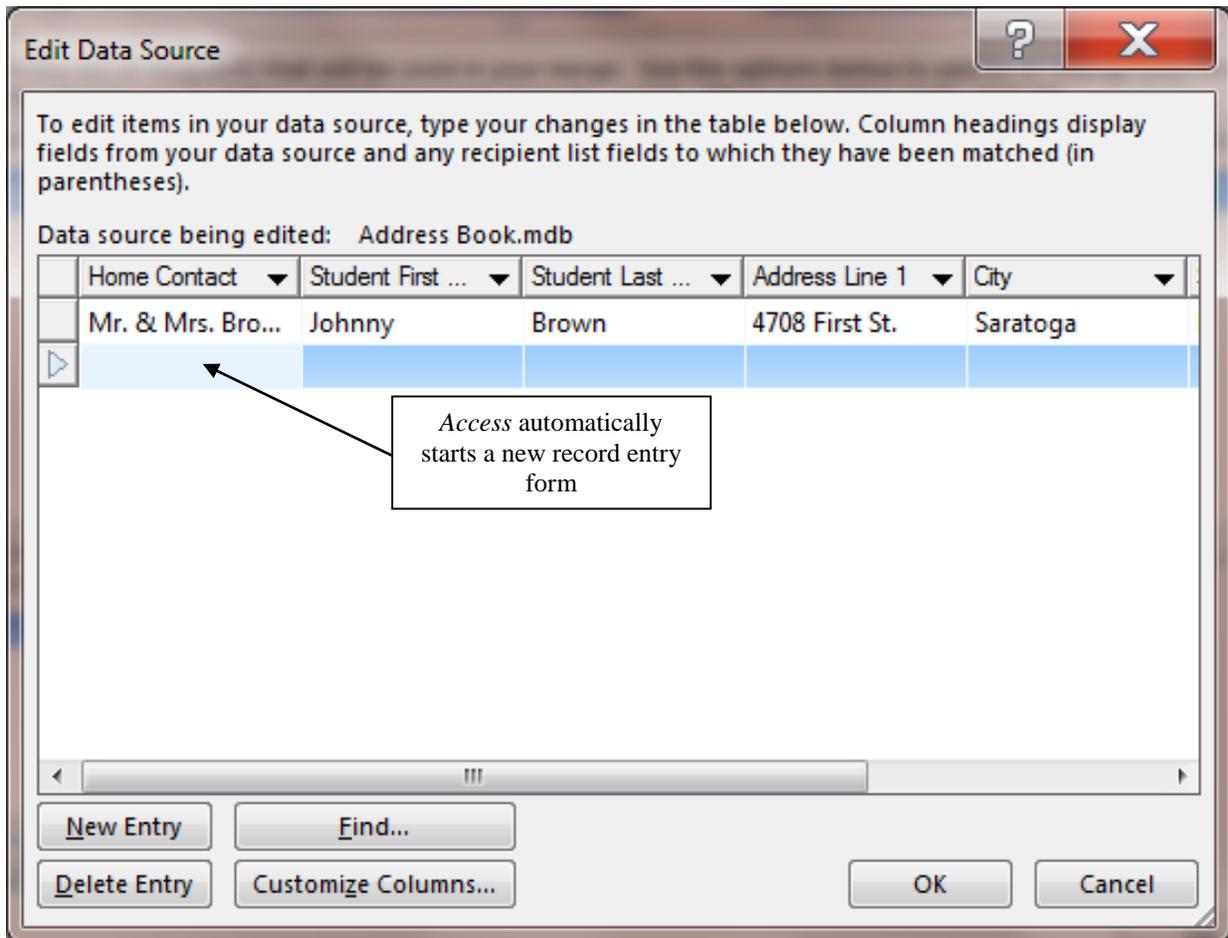


Fig 7.7 New Address List data entry window

You could continue now to enter as many records as you want. But we'll do that shortly so that you can learn how to add records to an existing database.

Right now, for safety's sake, you are going to *Save* this new database so that you have the work that you've already done safely stored on your disk in the location of your choosing—Murphy's Law¹ says there'll be a power cut any time now, so better safe than sorry, as they say.

Click on the **OK** button

¹ Murphy's Law says: "If anything can go wrong, it will."

Word now clears the *New Address List* dialog box off the screen and brings up the *Save Address List* dialog box. By now you should know how to navigate to a specific folder on your computer.

Navigate to the **Work Files for Office 2016** folder > **Data Files** folder> **Databases** folder, and **save** the new database with the name **Address List**

After you've saved the Address List database, you can add new records, sort them, and so forth. To do this, you use the *Mail Merge Recipients* dialog box illustrated in Fig. 7.8 below. But first you should learn how to edit this Recipients list.

Editing the Mail Merge Recipients list

It will be easier for you to see each complete student record when you edit the Mail Merge Recipients list so that you can more easily make changes to any of the seven fields in each record. There are a couple of things you can do to achieve this.

Changing the shape of the window (Resizing the window)

Grab the **Title Bar** at the top of the window (Fig. 7.8) to move the whole window on the screen over **to the left**; then use the mouse to grab the **resize tool** in the **lower right corner** of the window (Fig. 7.8) and drag to the **right** as far as necessary till you can see **all 7 columns of data**

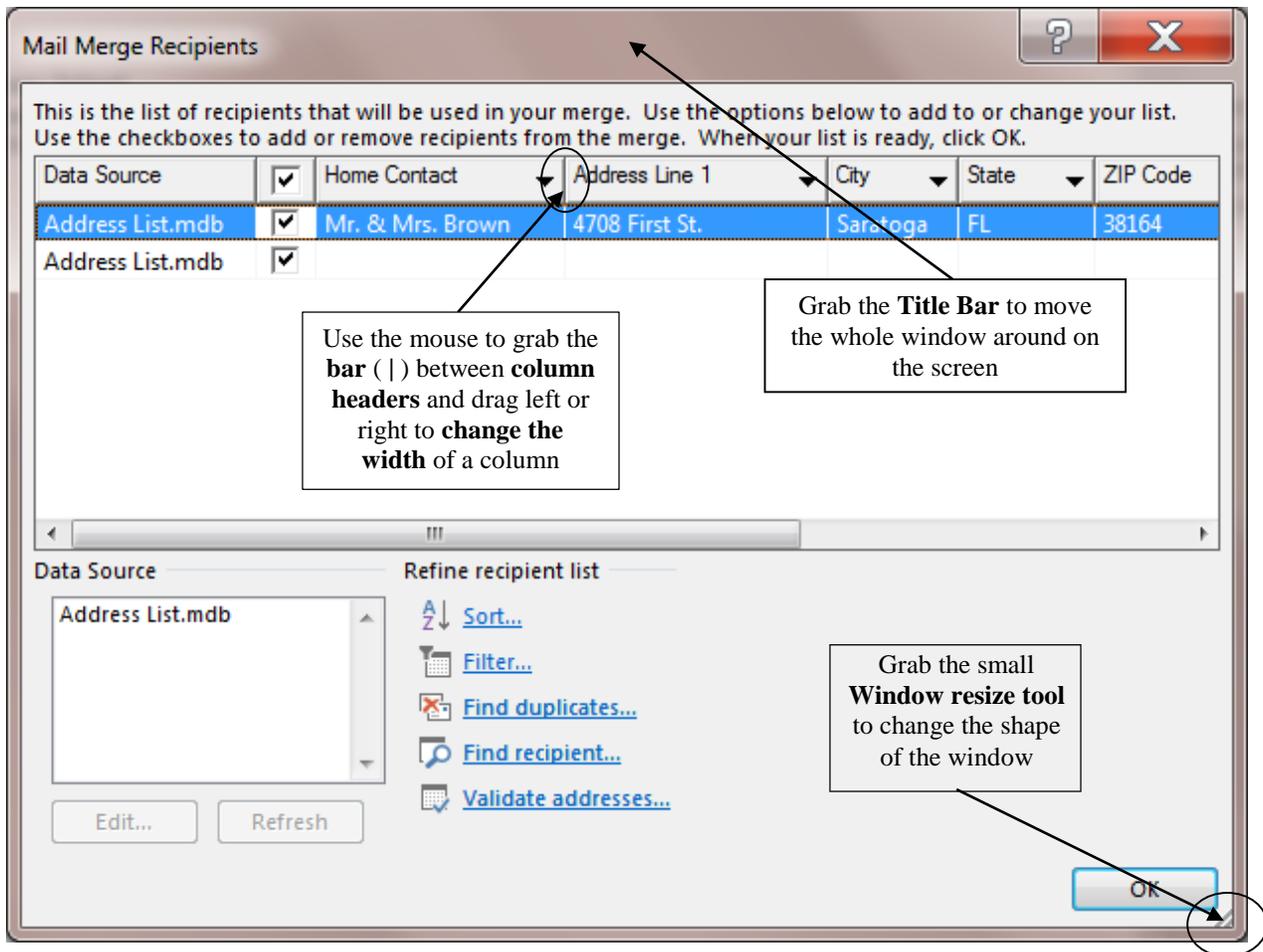


Fig. 7.8 The Mail Merge Recipients dialog box

Resizing the column widths

Move the mouse pointer **between any two column headers** (Fig. 7.8 above) till the cursor becomes a **cross hair**, then hold down the **left** mouse button and **drag right or left** to make the column wider or narrower depending on the data in the column

Changing the order of the fields (columns) in the list

Use the mouse to grab any column header (such as **Home Contact**) and **drag to the right or left** to where you want to reposition the column, then drop the column header in place

After you've practiced using these layout tools, you can now go ahead and start to enter data for more student Address List records.

Entering the data for the remaining records in the Address List database

You are going to enter the data for just 9 more records (making a total of 10). With a real class, you would enter as many sets of address data as you have students in your class. So feel free, if you are a practicing teacher, to add as many records as you need for your class.

You will shortly be merging this data with a form letter. Later you'll be using an already existing database to create form letters for a larger class of students.

This exercise is designed to show you how you can create an address list database, or any database, from scratch—and from within *Word*—using *Word's* Mail Merge function.

In the **Mail Merge Recipients** dialog box, in the **lower left** section of the window, click on the name of the **Address List Data Source** (Fig. 7.9), then click on the **Edit...** button

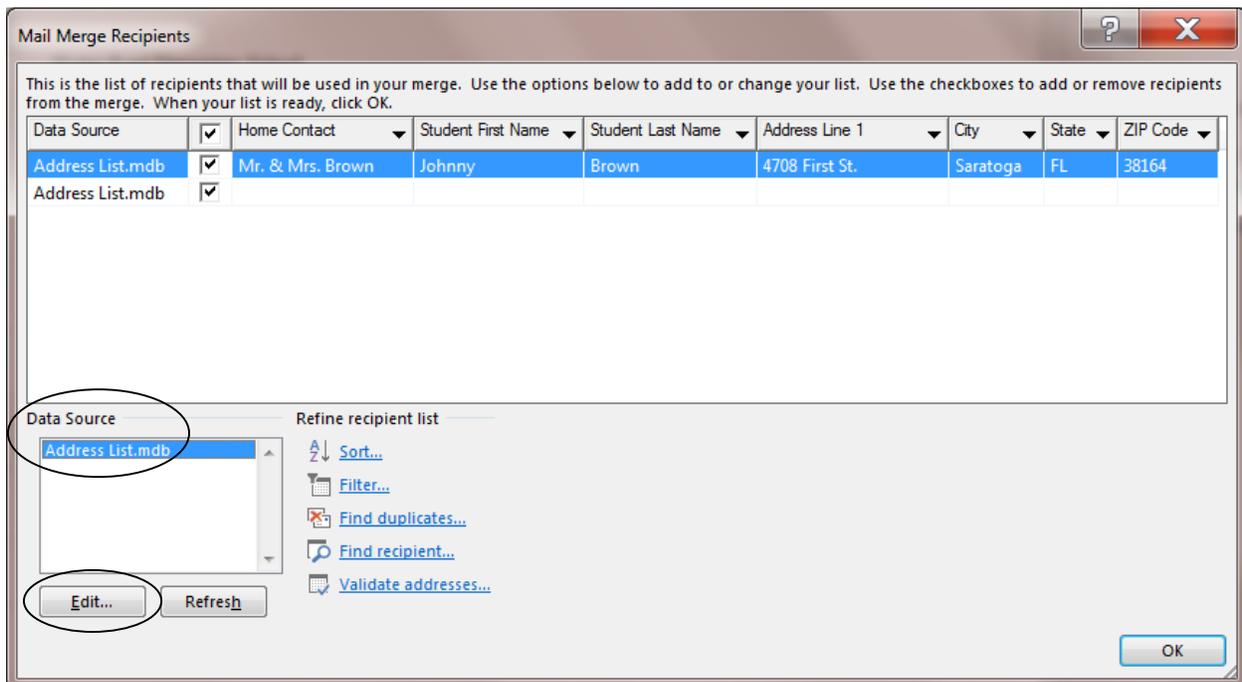


Fig. 7.9 Mail Merge Recipients dialog box after resizing

In the **Edit Data Source** dialog box that pops up on the screen (Fig. 7.10), click on **New Entry**

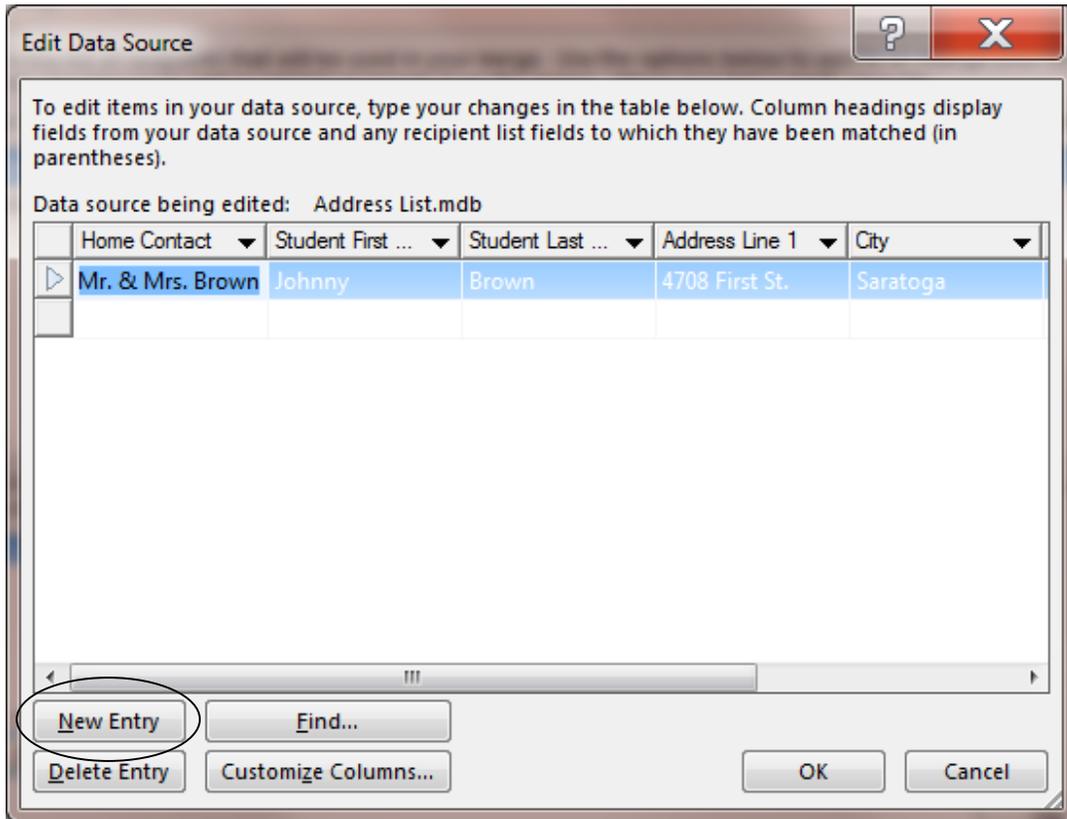


Fig. 7.10 Entering data for a new record

Type in the data for a new record—as before, make up the data and type the data for each field in the appropriate data entry box, starting with the name of a parent or other **Home Contact**, hit **Tab**, then type a **Student First Name**, and so on across the database table

Make up sets of data for at least **nine** student address records, clicking on the **New Entry** button after you complete the entries for each record or simply hit the **Tab** key after you finish typing the entry for the last field in a record

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

You'll be asked if you want to save the data you have just entered into the database (Fig. 7.11).

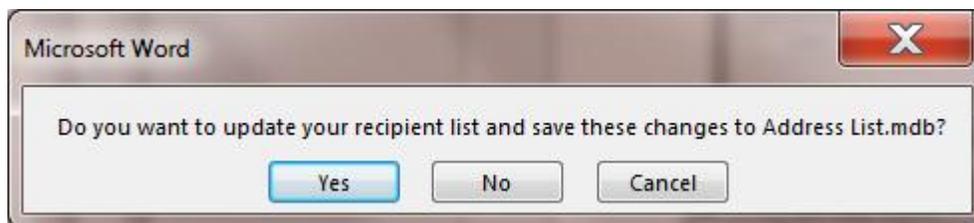


Fig. 7.11 Prompt to update and save the the recipient list records to the Address List database

Click on **Yes**, then click on **OK**

Word now clears the *Mail Merge Recipients* dialog box off the screen. The *Letters* word processing template, which you loaded at the beginning of this lesson, remains open on the screen. 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 database you just created.

You have all the data for the form letter ready in the *Address List* database. All that remains is to write the form letter with which the data from the *Address List* database will be merged.

7.3 CREATING THE FORM LETTER (THE FIELD TRIP NOTICE)

Step 4: Write your form letter

Step 4 of the process of merging data for the form letter involves creating the Field Trip announcement letter into which will be merged the *Address List* records that you have prepared.

Fig. 7.12 shows the complete contents of this Field Trip letter which you will shortly type into the *Letters* template document. You'll need to refer back to this letter in due course.

Don't start typing it just yet, however—read the directions that follow the figure first in order to avoid making mistakes

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

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

Dear <<HomeContact>>:

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. 7.12 The form letter

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

In the **File** menu select **Save As**

Navigate to your **USB drive > Work Files for Office 2016 > Data Files > Word Documents** folder, type **Field Trip Notice** for the document name, then click on **Save**

Now, at the **bottom** of the Mail Merge Task Pane, click on **Next: Write your letter** to proceed to **Step 4** of the Mail Merge process

You are going to have *Word* produce a customized, that is to say *individualized*, letter to send to the parents or guardians of each student in your class. As you can see, the form letter illustrated in Fig. 7.12 on the previous page reports to parents on a field trip that their child will be taking.

The placeholders (where the field names are enclosed by the << ... >> symbols) indicate the place in the form letter where data from the Address List database will be merged with the letters.

Unless you already know what you're doing, follow these directions carefully as you write the rest of the letter.

Inserting the date

You need to put the date at the top of your letter, immediately after the address in the *Letters.doc* template which, in a real situation, would be the official address of the school where you are a teacher.

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 *Word* fill in the current date for you (assuming the date set in your computer is correct, of course!). You have two possibilities here.

Either:

If the date and time on your computer are correct, here's what you do:

In the **Insert Ribbon > Text Group** select **Date and Time...** then, in the **Date and Time dialog box**, select whichever **date format** you prefer and click on **OK**

Now skip the next set of directions and proceed directly to the sub-section on the next page titled **Inserting fields (placeholders) into your form letter**

Or:

If the date and time on your own computer are incorrect, here are the steps to check them and correct them if they are wrong.

Look in the **System Tray** in the **lower right corner** of your screen, where you can see the **Time of day** and the **Date**

Right click on the **Time/Date** and, in the pop up menu, select the option to **Adjust Date/Time**

You should see the Date/Time Properties dialog box on the screen (Fig. 7.13).

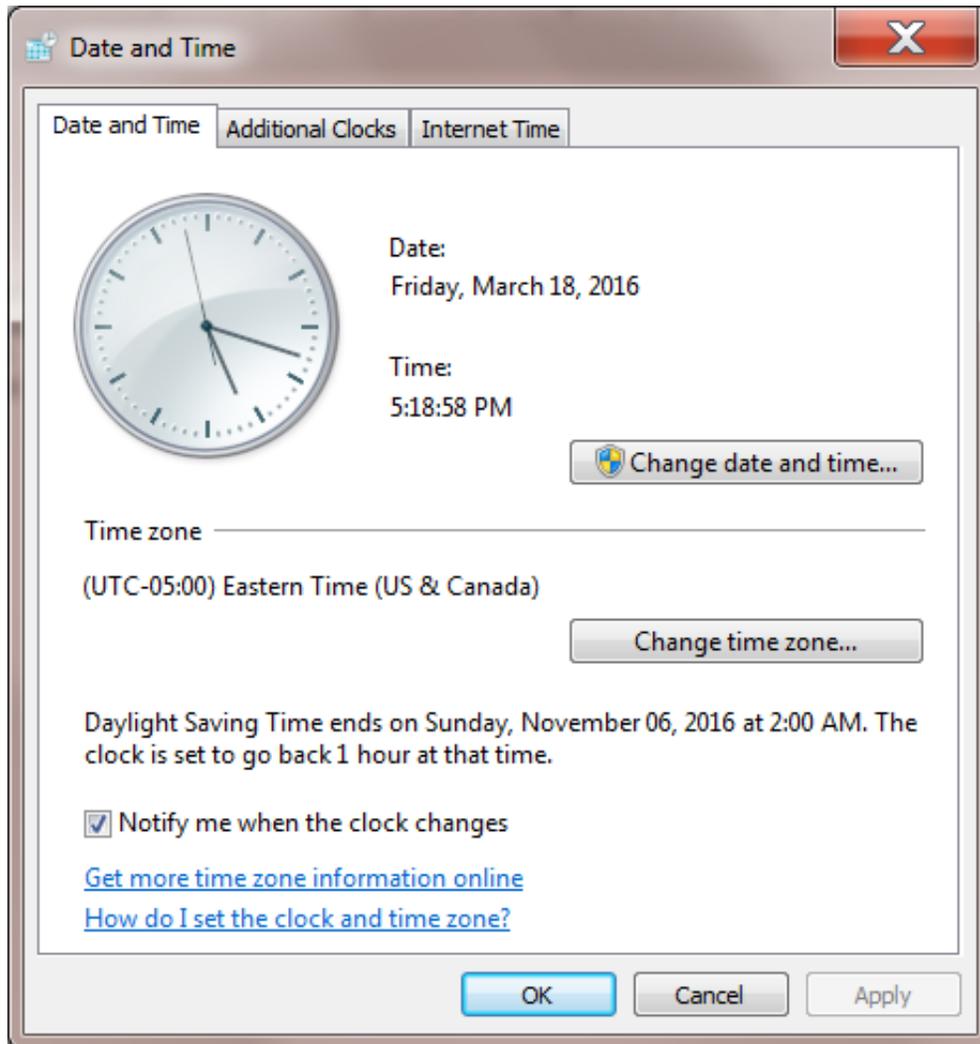


Fig. 7.13 The Date/Time Properties dialog box

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

If you can, 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 obviously important. Windows will automatically adjust the time (which is always relative to where you are) once you select the time zone in which you live.

If necessary, make any corrections to the **Month**, **Day**, or **Year** and to the **Time of day** (see Fig. 7.13)

Click **OK** when you are satisfied that everything is squared away in the **Date & Time Properties** dialog box

Inserting fields (placeholders) into your form letter

You are now going to insert into the form letter the first set of placeholders—for the receiver's name and address (the receiver is the Home Contact of one of your students).

For each of the lines of the receiver's address, after your own (school) address at the top of the letter, will start with the **Home Contact** field. So you need to tell *Word* to merge the form letter with the corresponding data from the *Address List* database. Here is how you do this.

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

In the **Mail Merge Task Pane**, click on **More items...** to bring up the **Insert Merge Field** dialog box (Fig. 7.14)

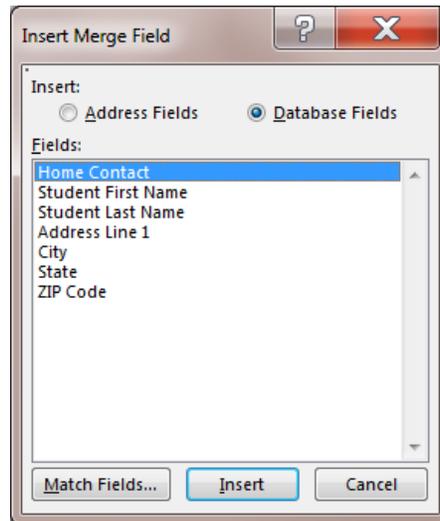


Fig. 7.14 The Insert Merge Field dialog box

From the dialog box, select the field **Home Contact**, click on the **Insert** button, then click on **Close**

Immediately *Word* displays <<**Home Contact**>> in the letter (with the brackets already around it as you see here—you never need to type the brackets with Mail Merge). Now, when eventually the letters (all ten of them) are printed out, the correct name of each student's parent or guardian will be copied from the *Address List* database and inserted into this position in the letter.

Next you need to add the rest of the Home Contact's address.

Press the **Enter** key to move to a new line then, in the **Mail Merge Task Pane**, click on **More items...** once again and, in the pop up menu, select the field **Address Line 1**

Word adds the new merge field to the address.

Press the **Enter** key to move to a new line, click on **More items...**, and, from the **Insert Merge Field** dialog box, select the **City** field

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

From the **Insert Merge Field** dialog box select the **State** field, stay on the same line again, hit the **space bar once**, then from the **Insert Merge Field**

dialog box select the **ZIP Code** field to round off the address that's to be merged with the letters

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

So far, so good. 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** to space over **one space**

Now, click on **More items...**, and, from the **Insert Merge Field** dialog box, select the **Home Contact** field, 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 rest of the **Field Trip letter** illustrated in Fig. 7.12 on page 257—be sure to put a **space before** and/or **after each Placeholder** so that the data will be correctly spaced grammatically in the final version of the letter

When you have finished, **Save** the form letter (**Field Trip Notice**)

Step 5: Previewing your letters

Before printing your letters, you can preview them on the screen to see how the data from the Address List source document will look when it is merged with the form letter.

At the bottom of the **Mail Merge Task Pane**, click on **Next: Preview your letters**

This will take you to Step 5 of the Mail Merge process. You have tools in the Mail Merge Task Pane (Fig. 7.15) which will help you scan the letters to see how the data has been merged with each one individually wherever you have put a placeholder to tell *Word* to insert a merge field.

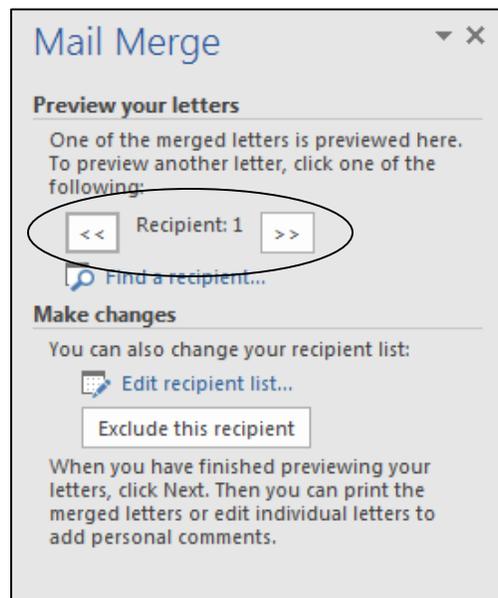


Fig. 7.15 Tools for previewing the letters

Click on the **arrows (<< >>)** to scan through the recipients' letters

Notice how the data from the Address List has been merged into each of the letters, giving each letter a customized look. Notice, too, that you can further edit both the recipients list and the letters at this stage, prior to printing the Field Trip notices.

7.4 PRINTING THE FIELD TRIP NOTICE

Step 6: Complete the merge

It's time for Step 6 of the mail merge process. Before we print the Field Trip Notices, however, let's review what we've done so far.

- In **Step 1** you selected *Letters* as your document type.
- Then in **Step 2** you opted to *Use the current document* as your starting document, since you had already opened up the Letters template as the basis for the Field Trip Notice.
- **Step 3** is where you opted to *Type a new list* and you created the 10 records for the mail merge database (Address List).
- In **Step 4** you *wrote the text of the form letter*, including the placeholders for the data that is to be merged from the Address List.
- Then in **Step 5** you had the opportunity to preview your letters with the customized data inserted into each one.

Word can now swing into action and, in **Step 6**, merge the data from the Address List with the Field Notice form letter that you have prepared.

At the bottom of the **Mail Merge Task Pane**, click on **Next: Complete the merge**

At this point, you have two options in the Mail Merge Task Pane. You can *Print* the letters without further editing, in which case you would simply click in the Task Pane on *Print...* and *Word* will go ahead and print the 10 form letters.

Alternatively, before you print the letters, you can do some final editing. For example, you could add a sentence to each letter saying something special about the student. This would further individualize the letters, giving parents the sense that the letter they receive is unique to them. Let's see how this would work.

In the **Mail Merge Task Pane**, click on **Edit individual letters...** and, in the dialog box that pops up, click on **OK** because you want to edit every letter

Word immediately merges all your letters into one long untitled merge document.

Scroll down to check for yourself that there are 10 (ten) letters that are now part of **one long document**, ready for you to edit each of them individually in any way you want before printing them all out

Add a **short sentence** or **paragraph** of your own at the beginning of each letter (**at the beginning** of the **first paragraph**, after the salutation "Dear Mr. and Mrs...."), which further individualizes each letter, such as: "**It was good to see you at the Parent-Teacher evening last week.**" Or something like that...

When you have finished adding updates such as this, **Save** the merge document in the **Work Files for Office 2016 > Data Files > Word Documents** folder with the name **Field Trip Notice Merged Letters**

The document *Filed Trip Notice Merged Letters* is several pages long—at least 10 if each letter fits on one page, but 20 if each letter flows over onto a second page. Saving the merged letters is a good idea. It means that you have a copy of the final version of the updated letters for your records—a customary practice with regard to professional correspondence.

From the **File** menu select **Print** and click on **OK**, then watch while the printer runs off the customized letters, one for each of the students in the class

Close the **Field Trip Notice Merged Letters** document when you are done

A summary of the Microsoft Word 2016 Mail Merge features

- You are not obliged to use the fields *in the 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. For example, 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 *Home Contact* 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 the data stored in the database*. You don't have to include any other text.

It all depends on what you want to do.

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 20 to 30 students.

The more students you have in a class, the greater the productivity gain—though this is no argument for large class sizes! The personalization made possible by Mail Merge also means you can have a stronger impact.

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. Your students will be happy to enter relevant data into the database. This data might include parent's names and addresses, for example, plus their own first and last names and any other useful info such as hobbies, and so forth.

Running off the letters then takes little effort on your part. When confidentiality is important, run off the letters when the students are not around. However, as a rule it is to everyone's advantage when you 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!

7.5 PREPARING MAILING LABELS

Mailing labels are those address stickers that you often find on mass-mailed items 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

Word Merge documents, such as mailing labels, are always linked to a database. For this exercise, you will use the *Address List* database you created for the *Field Trip Notice* form letter. But first you need to open a new blank *Word* document.

Got to **File > New > Blank Document** and select **Save As**

Navigate to the **Work Files for Office 2016 > Data Files > Word Documents** folder) and save the new document with the name **Mailing Labels**

You'll need the Mail Merge Task Pane to help you build your mailing labels.

In the **Mailings Ribbon > Start Mail Merge Group > Start Mail Merge** menu select the **Step by Step Mail Merge Wizard...** to bring up the **Mail Merge Task Pane** (on the right hand side of the window)

Step 1: Select the document type

In the **Mail Merge Task Pane** click on the **radio button** next to **Labels**

Step 2: Select the starting document

At the bottom of the **Mail Merge Task Pane** click on **Next: Starting Document**

The default setting in the Task Pane is *Change document layout* (Fig. 7.16), which is fine for our purposes since we want to set up the layout for the new mailing labels in the new document you just opened.

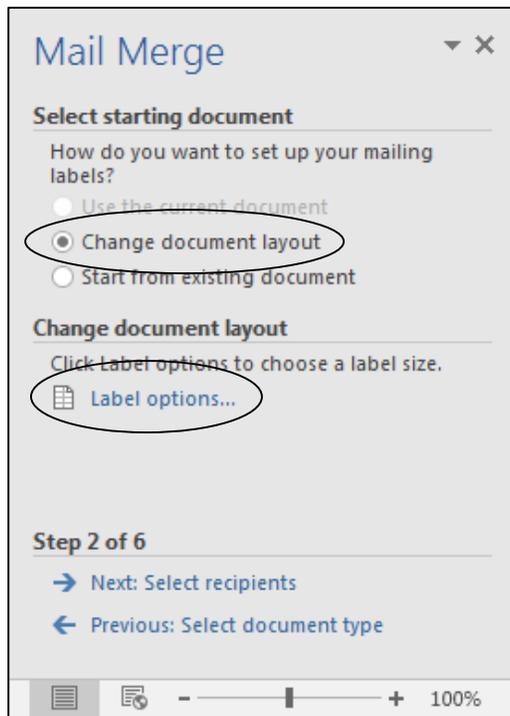


Fig. 7.16 Task Pane for selecting a starting document

In the **Mail Merge Task Pane** click on **Label options...** (Fig. 7.16 above)

You are now asked to choose which style of mailing label you want (Fig. 7.17).

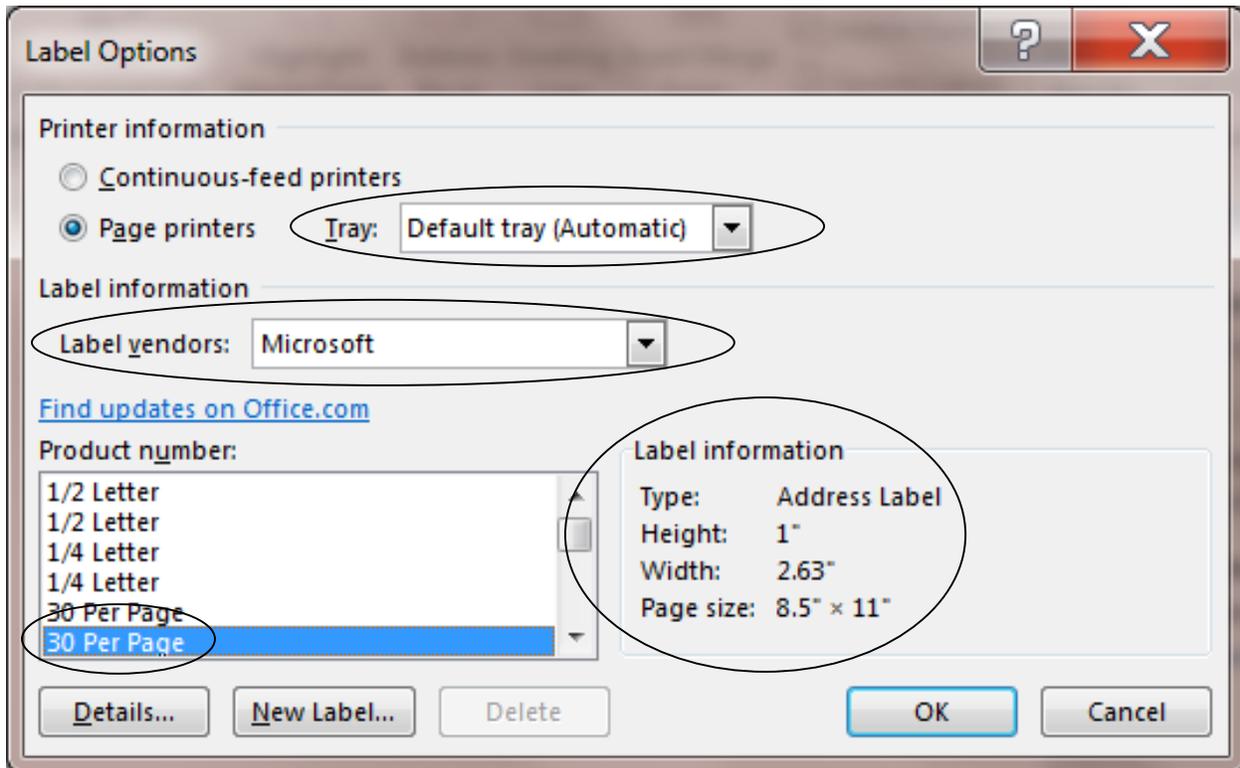


Fig. 7.17 The Label options dialog box

Notice in Fig. 7.17 that *Word* will automatically select the default paper tray for the print job.

If this is not the case in the dialog box on your screen, **select this option now**

You need to choose the size of the mailing labels, too. Mailing labels come in all shapes and sizes, and it would be counter-productive to try to address all possibilities in this tutorial. Microsoft *Office 2016* has many built-in templates categorized according to the Company and Product Number (Fig. 7.17 above).

For the sake of convenience, we will use *1" by 2.63"* mailing label stickers on standard letter paper of *8½ by 11 inches* with 30 labels per page.

In the **Label options** dialog box, for the **Label information**, in the **label vendors:** box select **Microsoft**, and in the **Product number:** list, scroll down if necessary and locate the **second 30 per page** option (Address Label, 1" x 2.63". 8.5" x 11"), and click **OK**

If you want to print actual mailing labels, you would need to have an 8½" by 11" sheet of mailing label stickers ready in the printer. If you don't intend to prepare mailing labels for a real application right now, you can print out the mailing label data on a regular sheet of 8½" by 11" paper. But you need to do a couple other things first.

Step 3: Select recipients

In the **Mail Merge Task Pane** click on **Next: Select recipients**

The default option is to use an existing list. This is the option you want, since you're going to use the *Address List* database you created in the first part of this lesson.

In the **Mail Merge Task Pane** click on **Browse...** and navigate to your USB drive > **Work Files for Office 2016 > Data Files > Database Documents** the **Address List** database

Word now displays a list of the contents of your *Address List* database. You are going to make a mailing label for each of the students listed in the *Address List* database, but notice that you could select as many or as few as you want. You don't always want an address label for *everyone* in your Address List.

Click on **OK**

Step 4: Arrange your labels

At the bottom of the **Task Pane**, click on **Next: Arrange your labels**

In the new Task Pane (Fig. 7.18), you are asked to "Arrange your labels" by selecting the items from the Address List in the order that you want them to appear on each mailing label.

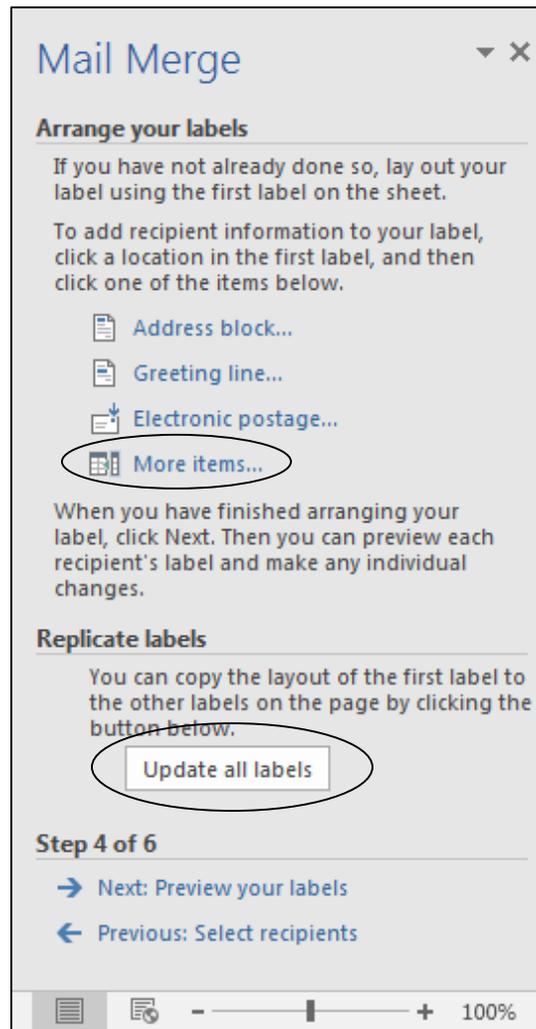


Fig. 7.18 The Task Pane to *Arrange your labels*

You also are asked to "lay out your label using the first label on the sheet." Fig. 7.19 illustrates how the mailing labels will look when you have completed this step.

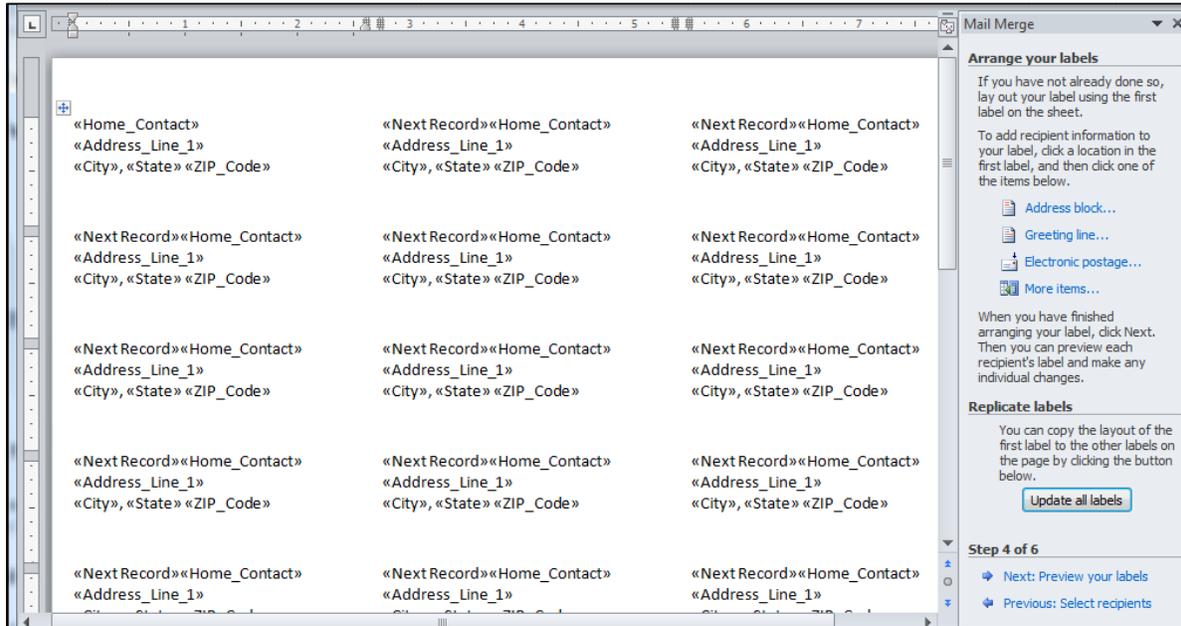


Fig. 7.19 The final look of your mailing labels sheet

The cursor is waiting at the beginning of the first label on the sheet for you to go ahead. The first item in each address label will be the *Home Contact*, as you might expect.

In the **Task Pane** click on **More items...** (see Fig. 7.18 on previous page)

The *Insert Merge Field* dialog box pops up listing the various fields in your Address List.

Select the **Home Contact** field for the first line of the address label, hit **Enter** or click on the **Insert** button, then click on **Close**

To avoid the default double spacing of *Office 2016*, in the **Home Ribbon** > **Styles Group**, click on the **No Spacing** icon

Hit the **Enter** key to move the cursor down to the next line then, in the **Task Pane**, click on **More items...**

Select the **Address Line 1** field, hit **Enter** or click on the **Insert** button, then click on **Close**

Hit the **Enter** key to move the cursor down to the next line then, in the **Task Pane**, click on **More items...**

Select the **City** field, hit **Enter** or click on the **Insert** button, then click on **Close**

Type a **comma (,)** followed by the **space bar** then, in the **Task Pane**, click on **More items...**

Select the **State** field, then hit the **space bar** then, in the **Task Pane**, click on **More items...**

Select the **ZIP Code** field, hit **Enter** or click on the **Insert** button, and click on **Close**

There is one critical step before the labels are ready for printing. Now that you've set up the first mailing label on the page, you need to replicate that layout for all the other labels on the page, which is fortunately simple to do.

In the **Mail Merge Task Pane** click on the button to **Update all labels** (see again Fig. 7.18 on page 266 above)

The mailing labels are ready for printing. But before you do that, you should preview them just to make sure everything is correct. This is important. Computers are just dumb machines—they'll do whatever you tell them to, even if it's the last thing you want, and you don't want to waste sheets of sticky mailing labels. So...

Step 5: Preview your labels

At the bottom of the **Mail Merge Task Pane** click on **Next: Preview your labels**

If you had many addresses in your Address List you might need to scroll to check them all out, or you could check out individual addresses by clicking on Find a recipient... This isn't necessary for this exercise since you have only a few (10) names and addresses in your Address List.

Next, from the **File** menu select **Save As** to save the final version of the **Mailing Labels** merge document

Step 6: Complete the merge

Even if you intend to use an actual sheet of sticky mailing labels, you'd be well advised to print a copy on regular (recycled) paper first so you can check to see that everything looks OK before you go ahead and print on a sheet of actual mailing labels.

At the bottom of the **Mail Merge Task Pane** click on **Next: Complete the merge**

Make sure the printer is set up with the paper you intend to use before proceeding.

In the **Mail Merge Task Pane**, click on **Print...** and print out a copy of the mailing labels

7.6 PREPARING A NEW FORM LETTER USING AN EXISTING DATABASE

In your *Work Files for Office 2016* folder there is a database called *Roster 2016*. It is a set of records for a sample class of 25 students. You are going to use the data in this database to prepare a form letter called *Mid Term Report*, which will report to parents/guardians on their child's progress-to-date half way through a semester. You are going to have *Word* merge the *Mid Term Report* with the *Roster 2016* database.

Close all the documents that are currently open (there's no need to save them) and **Open** a new **Blank Document** in *Word* (**Open Word >File >New >Blank Document**)

From the **File** menu select **Save As**, navigate to your **USB drive** > to **Work Files for Office 2016** > **Data Files** > **Word Documents**, give the new document the name **Letters Template**, and click on **Save**

In the **Mailings Ribbon** > **Start Mail Merge Group** select **Start Mail Merge** > **Step by Step Mail Merge Wizard...**

In the **Mail Merge Task Pane** > **Step 1**, **Letters** is already selected by default, so at the bottom of the Task Pane click on **Next: Starting document**

In the **Mail Merge Task Pane** > **Step 2**, the option to **Use the current document** is already selected by default, so at the bottom of the Task Pane click on **Next: Select recipients**

You are going to **Use an existing list**, so make sure the **radio button** next to that option is selected, then in the **Mail Merge Task Pane**, click on **Browse...**

In the **Select Data Source** dialog box that pops up on the screen, navigate to the **Work Files for Office 2016** > **Miscellaneous Files** > **Merge documents** folder and **double click** to **Open** the **Roster 2016** database

Word now displays the Roster 2016 Mail Merge Recipients list (Fig. 7.20).

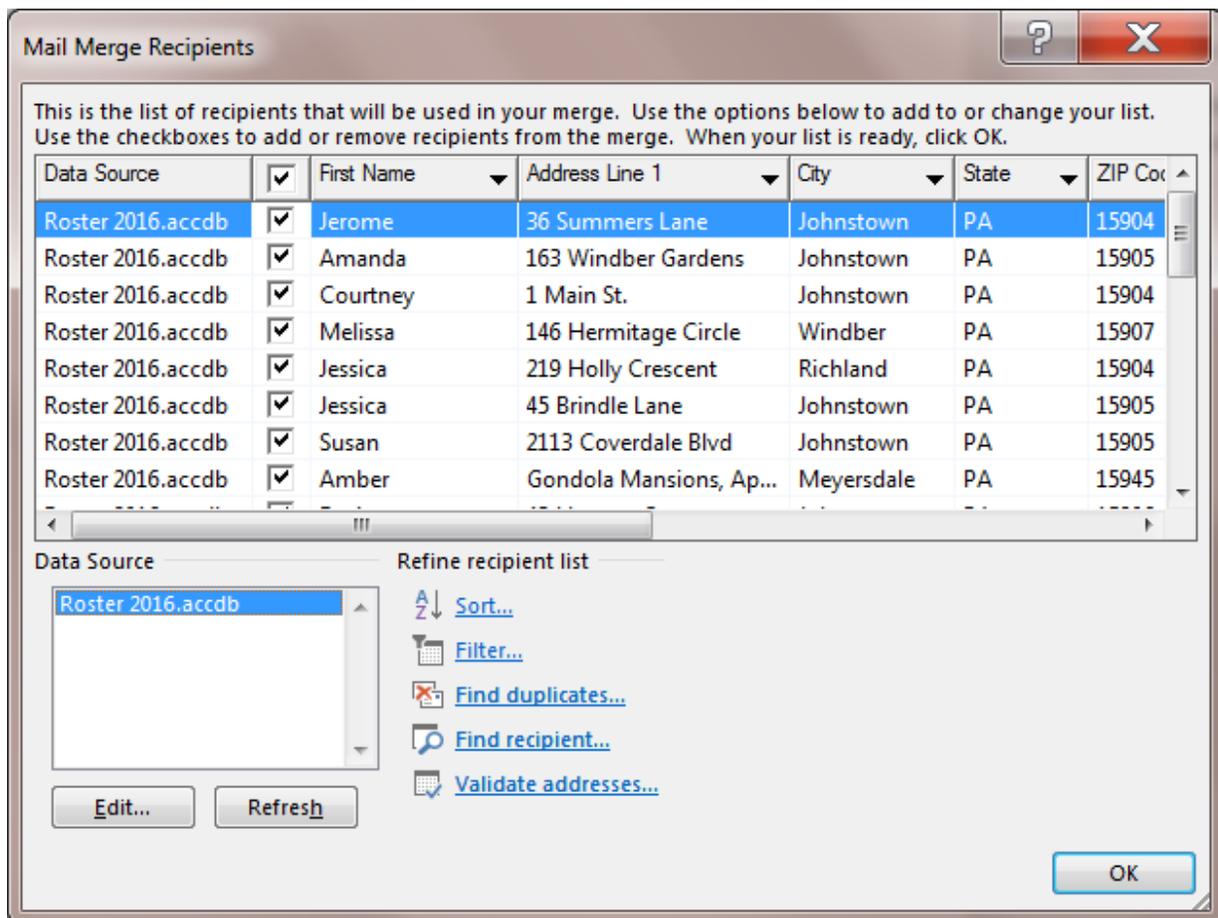


Fig. 7.20 Roster 2016 Mail Merge Recipients

Don't worry if the order of the fields (the columns) in Fig. 7.20 is different on your screen since it doesn't matter in the Mail Merge. You will decide where you want to insert the fields when you write the form letter.

Click on **OK** to accept the **Roster 2016** database for merging with the eventual **Mid Term Report** form letter

At the bottom of the Task Pane, click on **Next: Write your letter**

Macros

It is time to learn about macros¹.

Think of a macro as a small computer program made up of a short series of instructions that tell the computer to do something you tend to repeat over and over again—like writing your address and the date at the top of a letter.

A macro is thus a simple command to the computer to carry out a complex sequence of instructions. In fact, you can think of all the tools in the toolbars as macros. A quick keyboard command (*Ctrl+s*, for example) is a macro, or a click on an icon or in a toolbar or on a button in a dialog box are all macros, designed to carry out sophisticated computer operations.

You can use Microsoft's *Office 2016* to create your own macros and they can save you a lot of time. For example, you might want to have a macro (in *Word*) which produces a rubric template for the assignments you give your students. How about a macro (in *Excel*) that takes your students' scores on assignments and tests, then figures out their base grade (leaving you to decide the final grade)?

This is potentially powerful stuff. An example will be the best way for you to understand how macros work.

A caveat before you proceed: Macros are kind of nerdy! Neat, but nerdy. What does "nerdy" mean? Well, if you're, like, you know, like, really, really into computers you might find macros awesome. So complete the following exercise to see how they work, but don't feel bad if you discover that they're not your cup of tea. However, if you get the hang of macros, you may well find yourself on the highway to techie heaven. You may also discover that you're a bit of a nerd, which is not a bad thing in this technology-driven world of ours! Enjoy ☺

Creating the macro

You are going to create a simple macro that will type up a basic template for your professional correspondence. The process of creating the template will help you understand the concept of macros in general.

Here are the steps to create the macro.

The cursor should be at the **top** of the blank **Letters Template** document

To work with Macros, you must have the *Developer tab* showing at the top of the *Word* window. Here's how you do this, if it isn't already there (which it probably isn't).

Click on **File > Help > Options**

In the **Word Options** dialog box that comes up on the screen, click on **Customize Ribbon**

¹ As used here, the term is pure computerese!

In the *Word Options* dialog box, you can customize the set of *Word Ribbons* and **keyboard shortcuts** (Fig. 7.21)

Under **Customize the Ribbon**, select the **Developer** check box (Fig. 7.21 above) and click on **OK**

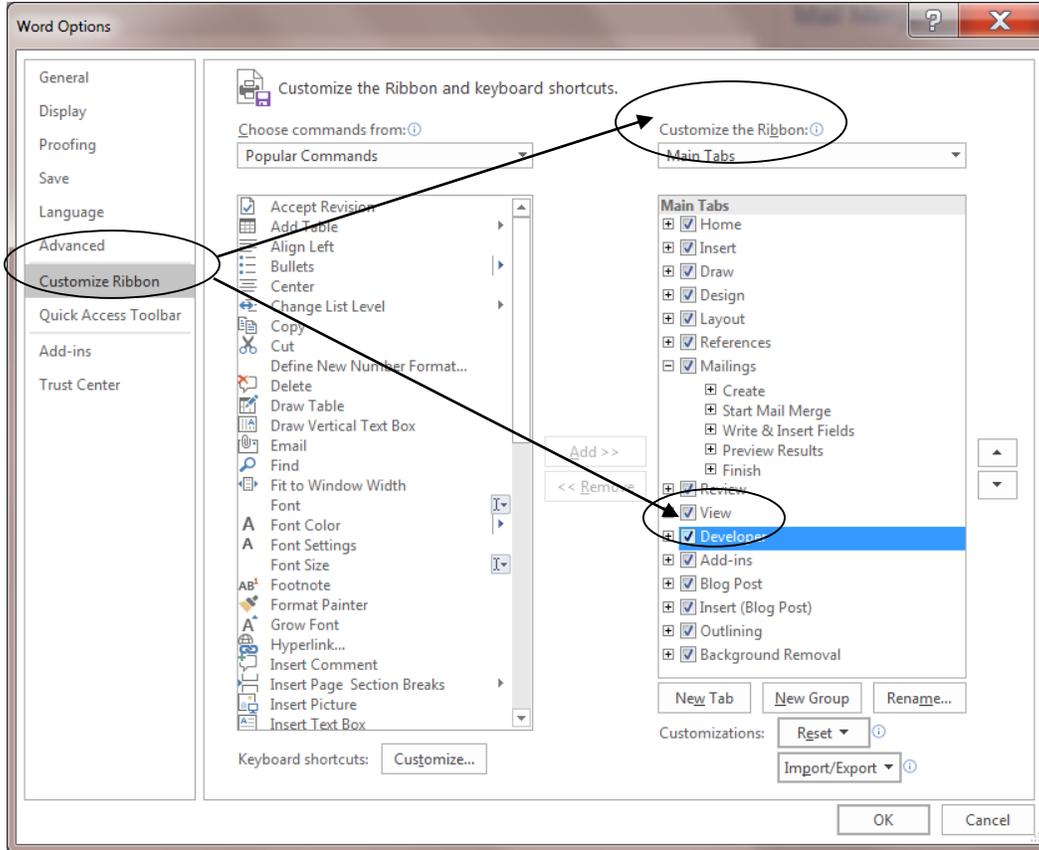


Fig. 7.21 Show Developer Tab in the Ribbon

Now you are ready to create the macro.

In the **Developer Ribbon > Code Group** click on the **Record Macro** button (Fig. 7.22)

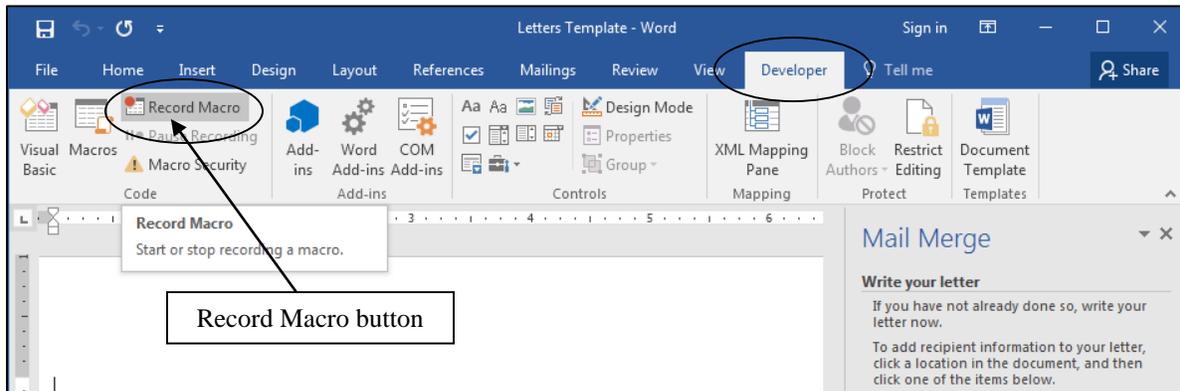


Fig. 7.22 The Record Macro button in the newly added Developer Ribbon

Word now displays the Record Macro dialog box (Fig. 7.23).

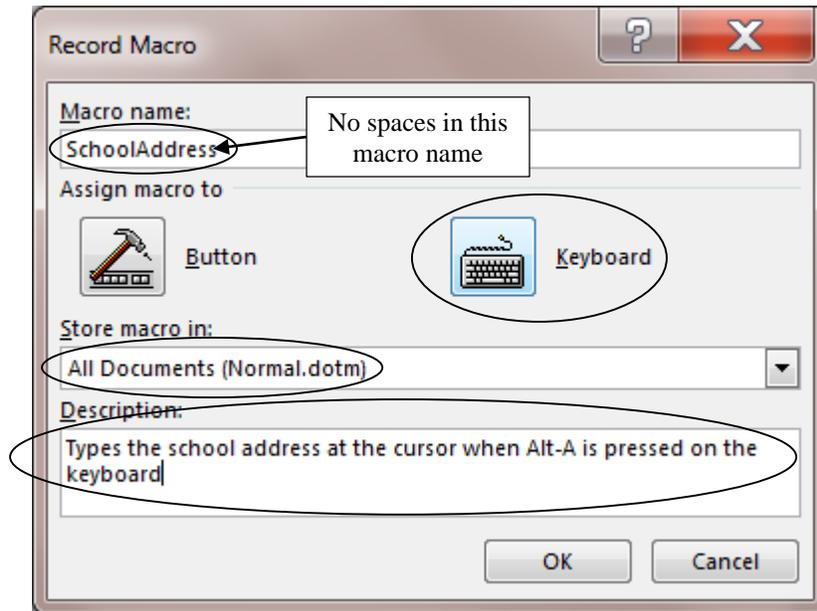


Fig. 7.23 Record Macro dialog box

In the **Macro name:** box, type **SchoolAddress** (no spaces, Fig. 7.23 above)

Next, in the **Description:** box (Fig. 7.23) enter **Types the school address at the cursor when Alt-A is pressed on the keyboard** and, in the **Assign macro to** section (check Fig. 7.23 above again) click on the **Keyboard** icon

Word now brings up the *Customize Keyboard* dialog box (Fig. 7.24).

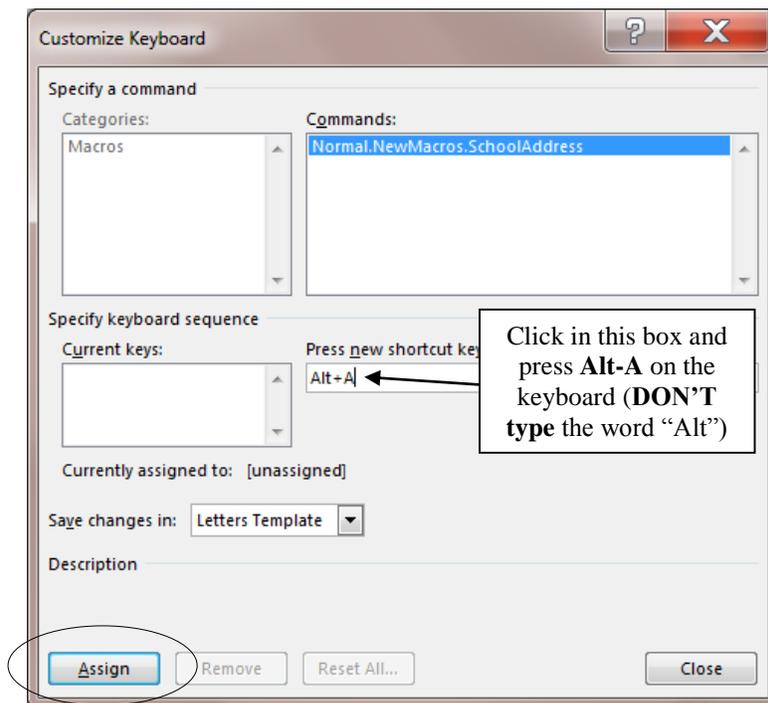


Fig. 7.24 The Customize Keyboard dialog box

Click to put the cursor in the **Press new shortcut key:** data entry box, then press **Alt-a** on the keyboard—**don't type** the word “Alt”, just hold down the **Alt key** next to the space bar and at the same time press the letter “a”

Alt-A is unassigned, so it's OK to use it as a key sequence for a macro.

Still in the Customize Keyboard dialog box, in the **drop down menu** next to **Save changes in:**, select **Letters Template**, then click on the **Assign** button, which transfers **Alt-A** to the **Current keys:** box (Fig. 7.25)

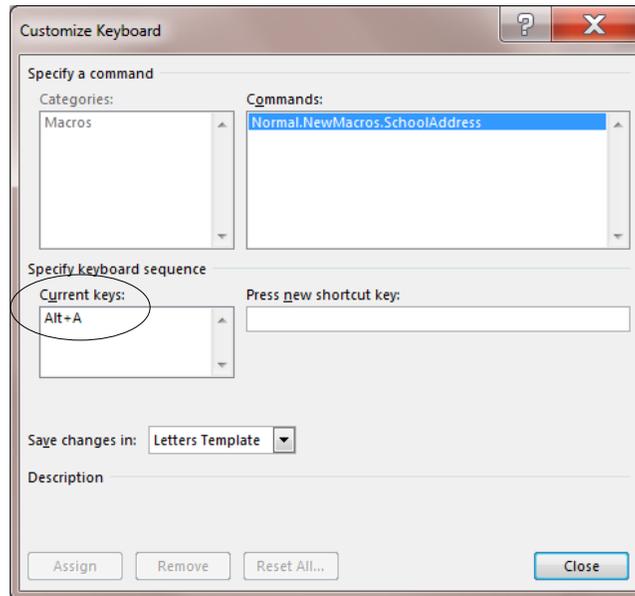


Fig. 7.25 Assigning the new Keyboard macro to the Current keys box

Finally, click on **Close** in the **Customize Keyboard** dialog box

In the Developer Ribbon > Code Group there are Macro control tools (Fig. 7.26) which you use to stop or pause the macro as you are creating it.

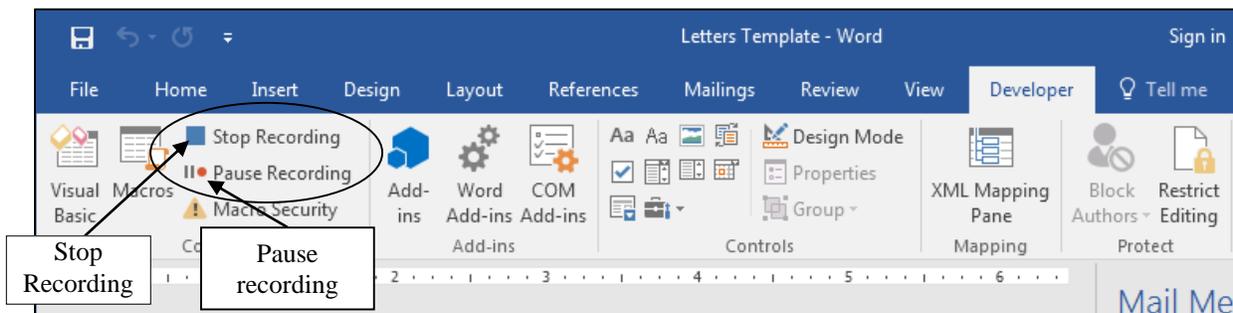


Fig. 7.26 Stop Recording macro control dialog box

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

Type the lines of either your **personal address** or your **school (business) 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 twice** after the last line so the cursor is **spaced down** and positioned at the beginning of an 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** again, 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, in the **Developer Ribbon > Code Group**, click on the **Stop** button (Fig. 7.26 previous page)

Now relax; you are off the hook!

Think about what you have just done: you have created a *Word* macro which will allow you to automatically enter into a *Word* document your address, the current date, and the basic outline for correspondence just by pressing *Alt-A* on the keyboard.

Using the macro

Follow these steps to practice using the macro. You'll start by deleting everything that's in the Letters Template.

From the **Edit** menu, use **Select All** (or **Ctrl+a**) to highlight all of the **data** you just entered into the **Letters Template** document

Hit the **Backspace** key to clear the document of all the address and other text you just typed in

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

Press **Alt-a** on the keyboard

...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. This is one of the Skill Consolidation exercises at the end of the lesson.

So...., you have just created a macro which will produce a template for your professional correspondence. If you're working on your own computer at home, you don't need to save it since you have the macro in the toolbar which will reproduce it whenever you want.

In the **File** menu, select **Save As** and in the **Save As Type** menu select **Word Macro-Enabled Document**, then hit **Save** to save the **Letters Template** with the macro built in

Renaming the *Letters Template* and creating the *Mid Term Report* form letter

Next you are going to use this template (still on the screen and also saved on your disk) to create a *Mid Term Report* document which will go out to the parents of your students. The report is illustrated in Fig. 7.27 on the next page. **DO NOT start typing the report in yet!** You have a

couple of other things to do to get set up for the mail merge. First you need to save the *Letters Template* with a different name so that you will have a copy of the template for future use.

Select **Save As**, change the name of the template to **Mid Term Report**, make sure you see **Word Macro-Enabled Document** in the **Save As box**, then click on **Save**

You are going to have *Word* produce one letter for each student in the *Roster 2016* class. As you can see, the form letter illustrated below in Fig. 7.27 reports to parents on how well their child is doing half way through the semester.

You already told *Word* that you want to merge the form letter with the data stored in the *Roster 2016* database. The placeholders (where the field names are enclosed by the << >> symbols) indicate the location in the form letter where data from the *Roster 2016* database will be merged when the letters are actually printed out.

<p>Press Alt-a to put your address, the date, etc. here using the macro you just created</p>	<p>«Home_Contact» ««AddressBlock»»</p> <p>Dear «Home_Contact»:</p> <p>As you may already be aware, I am «First_Name»'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.</p> <p>I am writing to report to you about «First_Name»'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 regard to class grades and attendance.</p> <p>«First_Name»'s current grade is «Grade». «First_Name» has missed «ATD» days so far this session, which is «Comment».</p> <p>Please feel free to contact me anytime to arrange a conference, especially if the grade or attendance data in the previous paragraph are not what you expected.</p> <p>I can be contacted at school between the hours of 7:30 am and 4:00 pm, Monday through Friday. My phone extension is 4365. You may also contact me using e-mail. My address is vanstaden@appleby.botw.k12.wy.us.</p> <p>I look forward very much to hearing from you.</p> <p>Yours sincerely,</p> <p><u>Mandi Van Staden</u> Instructional Technology Coordinator</p>
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Fig. 7.27 The Mid Term Report form letter

Wherever you see a placeholder (<< >>), use the *More items...* option in the Mail Merge Task Pane as you work your way through the letter.

You already completed a similar exercise earlier in this lesson. You might like to check back at what you did—*Section 7.3 Creating the form letter (the field trip notice)*—if you are still unsure about what to do.

All that remains is for you to type the letter as it is illustrated in Fig. 7.27, except that already you have *your* address and *today's* date at the top of the report and *your* name and title at the bottom. You did this when you created the macro for that purpose.

Go ahead and type the **remaining contents** of the **Mid Term Report** as illustrated in Fig. 7.27 on the previous page

Save the **Mid Term Report** document when you're done

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: **All Programs > Microsoft Office > Excel**

In the **Backstage view** select **Open Other Workbooks**

Browse to your **USB drive > Work Files for Office 2016 > Miscellaneous Files > Merge documents** folder, and then **open** the **Gradedata** spreadsheet

You are going to create a chart using the data in the *Gradedata* spreadsheet. This will be useful reinforcement of what you learned in Lesson 5. Here are the steps, in case you need the help.

Highlight cells **A1** through **B6** (the data that will be represented in the chart), then in the **Insert Ribbon > Charts Group** select the **Pie or Donut chart** option, then select the **Chart sub-type** for **3-D Pie**

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

In the **Chart Title:** data entry box, replace the title **Students** with **First Quarter Grades**

Save the spreadsheet document with the chart embedded in it

The chart is 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 (A1 through B6) the chart automatically will 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

Switch back to *Word* by clicking, in the **Task Bar** at the bottom of the screen, on the **Word Mid Term Report** icon

The *Mid Term Report* document should still be the active window on the screen.

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

Press **Enter** 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 **Mid Term Report** document

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

In the **File** menu select **Print Preview** to see how the report looks

If the letter goes over onto a second page this is no problem, but if it goes over by just a line or two it will be best to make it fit on one page. Try these alterations if you need 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).
- 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 and drag up and left to proportionally reduce the chart's dimensions. If you reduce it too much, however, you might spoil the appearance, so don't get carried away.

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 this set of ESSENTIAL Microsoft *Office 2016* tutorials will provide you with the opportunity to learn more about the *Access 2016* database and with the *PowerPoint 2016* presentation application. For the former you will learn how to work with an existing database for tasks such as searching and report-generation. For the *PowerPoint* lessons 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 K-12 classroom.

SKILL CONSOLIDATION

Complete these exercises to reinforce what you learned in Lesson 7.

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 database. You would check the database 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 database to store sets of test questions. Make up a representative set of, say, 20 questions, and store them in the database. Prepare a test report format (form letter) to merge with the test question database. 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 *SchoolAddress* 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 form letter 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.