

Technical Training Program

Educational
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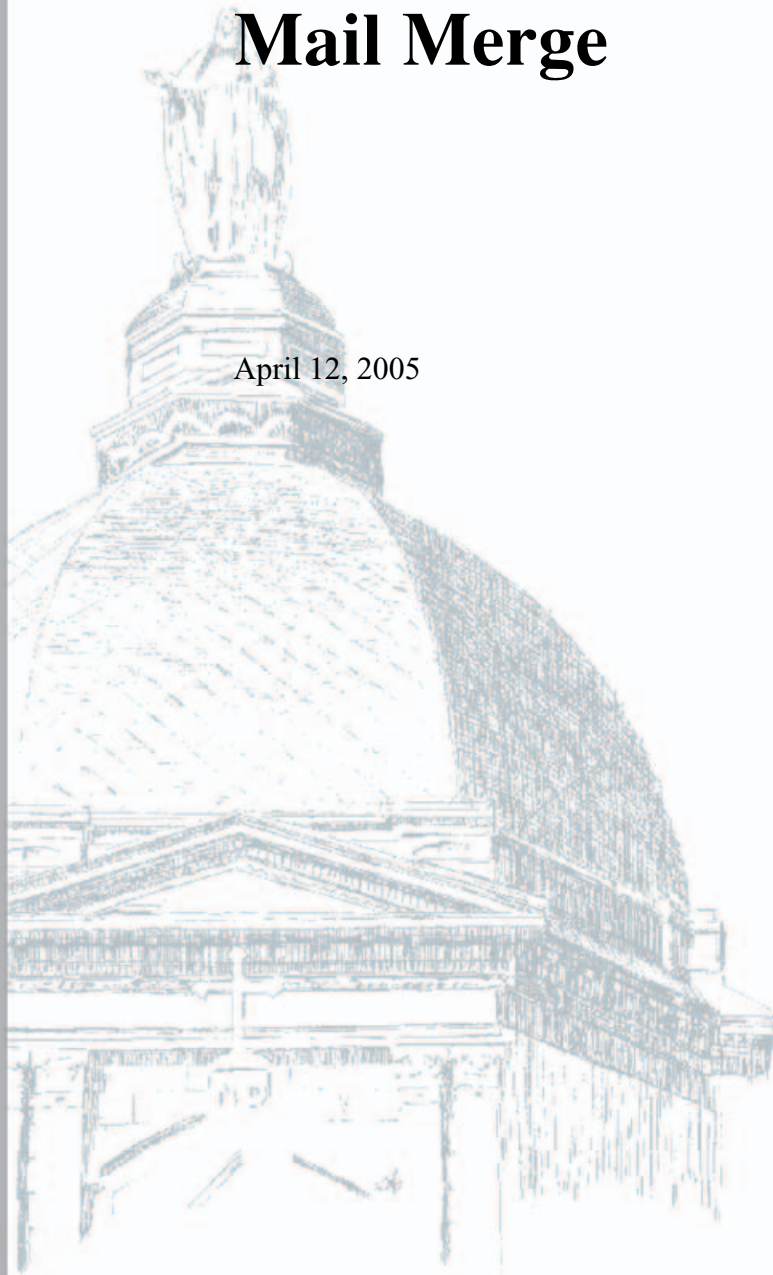


UNIVERSITY OF
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INFORMATION
TECHNOLOGIES

W3254(s) Word 2003: Mail Merge

April 12, 2005



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1 INTRODUCTION

Welcome to this one-day **Microsoft Word Version 2003** course. The primary objective of the course is to broaden a user's knowledge of Microsoft Word Version 2003, hereafter referred to as simply "Word," in most cases.

Course Objectives

After participating in this course, you should be able to:

- **Create a main document** and a **data source**.
- **Merge a main document and a data source**.

NOTE: This course assumes that all default Word settings are in effect when you start the program. Also, what appears on your screen may sometimes vary slightly from what is shown in this manual.

2 PERFORMING A MAIL MERGE

Introduction

This section discusses the methods for **merging the information in two documents**. In it, you will learn how to:

- **Initiate a mail merge.**
- **Create a data source.**
- **Create a main document.**
- **Merge a main document and a data source.**
- **Print mailing labels.**
- Use an external data source in a mail merge.

The Mail Merge Feature

Word's **Mail Merge** feature can be used to mass-produce form letters and other types of documents that include standard text and variable information. It can also be used to generate envelopes and mailing labels.

A **mail merge** operation combines the information in two documents:

- A **main document** -- which contains both the standard text and formatting that is to appear in each of the resulting documents, along with various merge fields representing variable information.
- A **data source** -- which contains the variable information that is to be inserted into the main document during the merge to customize each of the resulting documents.

To assist you in performing a mail merge, the program provides a **Mail Merge**, which is accessed by choosing the **Tools, Letters and Mailings, Mail Merge** command. Using this tool, the mail merge process involves six steps:

- 1) Selecting a merge document type (for example, letter or envelope)
- 2) Selecting a starting document (the document that is to be used as the main document)
- 3) Selecting or creating a data source
- 4) Creating or modifying the main document, if necessary
- 5) Previewing the main document with the information in the data source
- 6) Merging the main document and data source

Initiating a Mail Merge

In this subsection, you will initiate a mail merge to print a series of form letters.

Objective

In this exercise, you will **access Mail Merge**. You will then **specify both a merge document type and the starting document**.



1. Make sure that all documents are closed. Then display a **blank document** (unless a blank document currently appears).

ACTION (You Do)	COMPUTER RESPONSE / Comments
1. Choose the Tools, Letters and Mailings command, followed by Mail Merge .	The Mail Merge task pane is displayed (as illustrated below).
2. Under Select document type , make sure that the Letters option is selected.	The merge document type is set.
3. At the bottom of the task pane, click on Next: Starting document .	Step 2 of the mail merge process appears in the task pane.

ACTION (You Do)	COMPUTER RESPONSE / Comments
4. Under Select starting document , make sure that the Use the current document option is selected.	The starting document is set. NOTE: This document will be used for the main document, which you will create in a later exercise.

Creating a Data Source

Now that you have specified the merge document type and the starting document, you will continue the mail merge process by creating a data source. A data source is made up of fields and records. A **field** is one piece of information (for example, a name or a street address); a **record** is the collection of all fields for each merge document.

NOTE: You can use a number of different types of data sources in a mail merge, including the following: a Word document with field information arranged in tabular format (that is, in a Word table or with fields separated by either commas or tabs), a Microsoft Excel worksheet, a Microsoft Access table or query, or a Microsoft Outlook Contact list. A data source that is created with Mail Merge is called a Microsoft Office Address List.

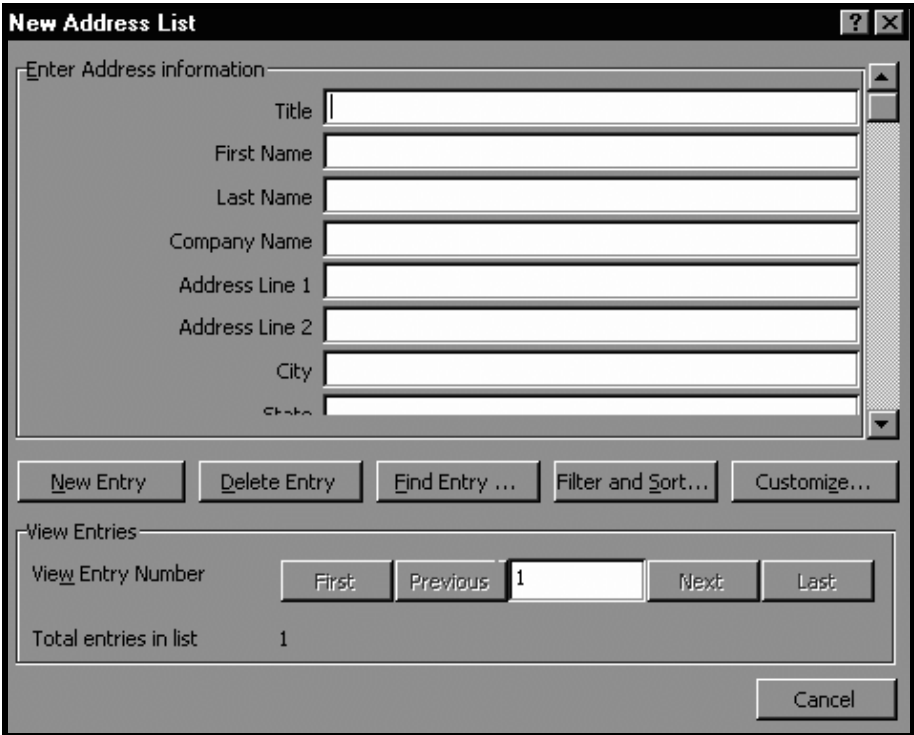
Objective

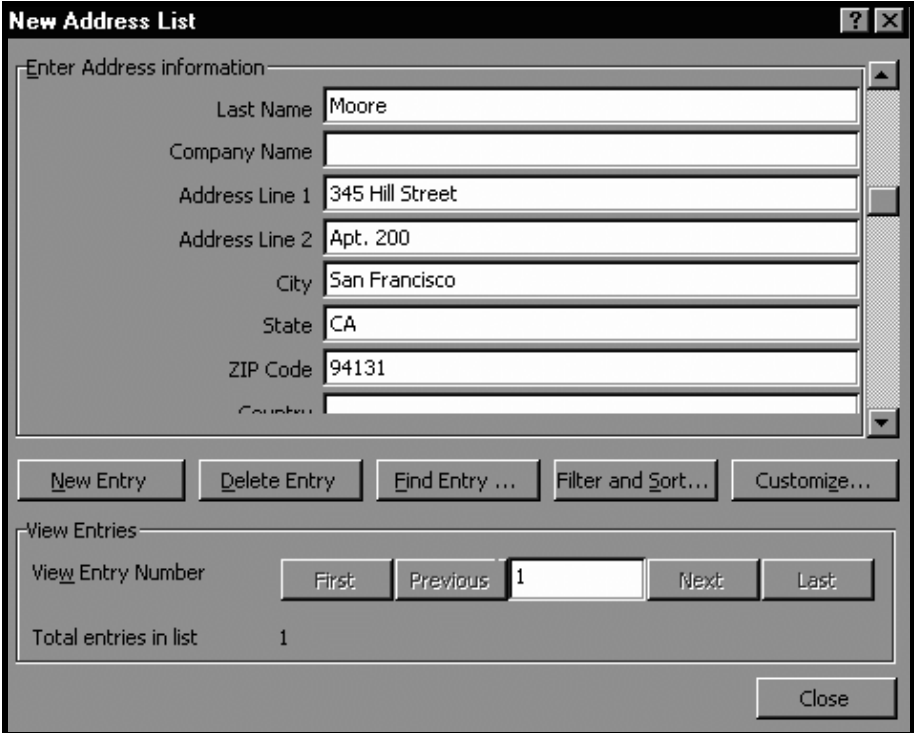
In this exercise, you will **create a data source containing names and addresses.**



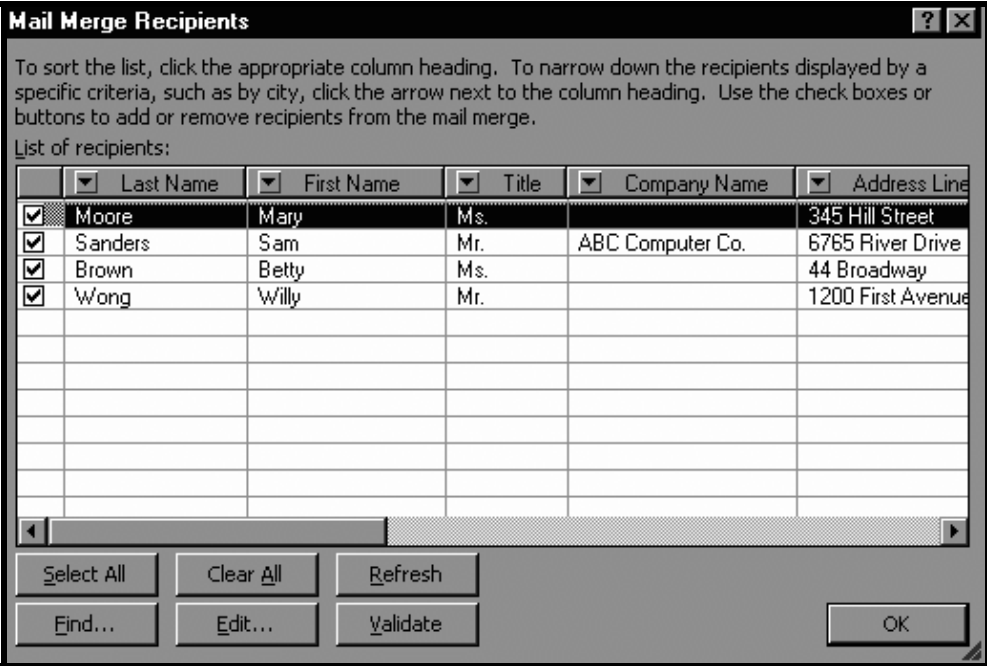
1. Make sure that the **Mail Merge task pane** is displayed. (Step 2 of the mail merge process should currently appear in the task pane.)

ACTION (You Do)	COMPUTER RESPONSE / Comments
1. At the bottom of the task pane, click on Next: Select recipients.	Step 3 of the mail merge process appears in the task pane.
2. Under Select recipients , click on Type a new list. Then click on Create.	The New Address List dialog box is displayed (as illustrated on the following page). You will now enter the field information for the first record. NOTE: The Customize button can be used to add and delete fields to and from the dialog box.

ACTION (You Do)	COMPUTER RESPONSE / Comments
	
<p>3. Type: Ms. Press [TAB].</p>	<p>The title is entered, and the insertion point moves to the First Name field.</p>
<p>4. Type: Mary Press [TAB]. Type: Moore Press [TAB].</p>	<p>The first name and last name are entered, and the insertion point moves to the Company Name field. (The record will not include an entry in this field.)</p>
<p>5. Press [TAB].</p>	<p>The insertion point moves to the Address Line 1 field.</p>
<p>6. Type: 345 Hill Street Press [TAB].</p>	<p>The street address is entered, and the insertion point moves to the Address Line 2 field.</p>
<p>7. Type: Apt. 200 Press [TAB].</p>	<p>The apartment number is entered, and the insertion point moves to the City field.</p>
<p>8. Type: San Francisco Press [TAB]. Type: CA Press [TAB]. Type: 94131</p>	<p>Additional information is entered. The dialog box should now appear as illustrated on the following page.</p> <p>NOTE: You will not enter information into any of the remaining fields.</p>

ACTION (You Do)	COMPUTER RESPONSE / Comments
	
<p>9. Click on the New Entry button.</p>	<p>A blank record is displayed in the dialog box.</p>
<p>10. Using the procedure described above, enter the records listed on the following page.</p> <p>NOTE: Notice that the first record includes an entry in the Company Name field and that the last record does not include an entry in the Address Line 2 field.</p>	

ACTION (You Do)	COMPUTER RESPONSE / Comments
<p>Title: Mr. First Name: Sam Last Name: Sanders Company Name: ABC Computer Co. Address Line 1: 6765 River Drive Address Line 2: Suite 111 City: Portland State: OR Zip Code: 97008</p> <p>Title: Ms. First Name: Betty Last Name: Brown Company Name: (None) Address Line 1: 44 Broadway Address Line 2: Apartment C City: Oakland State: CA Zip Code: 94656</p> <p>Title: Mr. First Name: Willy Last Name: Wong Company Name: (None) Address Line 1: 1200 First Avenue Address Line 2: (None) City: Seattle State: WA Zip Code: 98112</p>	
<p>11. Click on the Close button.</p>	<p>The Save Address List dialog box is displayed.</p>
<p>12. Type: Customers Choose the Save button (in the dialog box).</p>	<p>A filename for the data source is entered, the data source is saved, and the Mail Merge Recipients dialog box is displayed (as illustrated on the following page).</p> <p>NOTE: A data source created with Mail Merge is saved as a Microsoft Office Address List in a file with an extension of mdb.</p>

ACTION (You Do)	COMPUTER RESPONSE / Comments
	
<p>13. Click on the Last Name field heading (the gray button above the field entries).</p>	<p>The records are sorted in ascending order by last name.</p> <p>NOTE: Clicking again on the same field heading will sort the records in descending order by last name.</p>
<p>14. Click on the OK button.</p>	<p>The dialog box is closed.</p> <p>NOTE: Notice that the Mail Merge toolbar has been added to the Application window. This toolbar can also be used in a mail merge. In this section, however, you will use only the options in the Mail Merge task pane.</p>

Creating a Main Document

Now that you have created a data source, you are ready to create a main document.

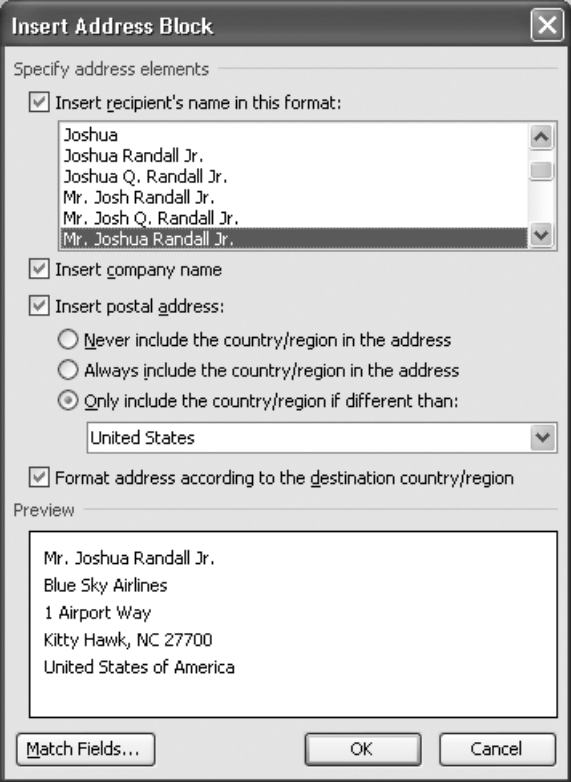
Objective

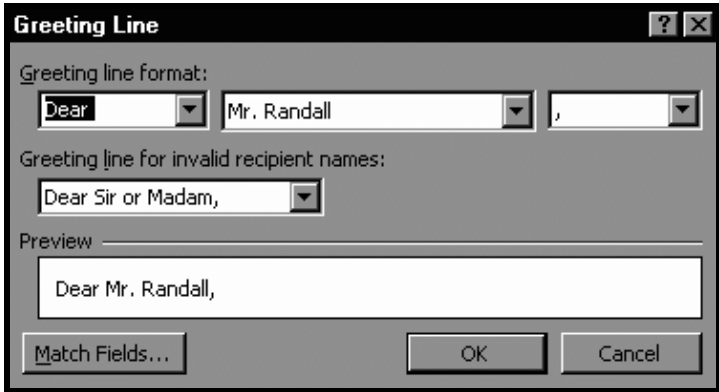
In this exercise, you will **create a main document containing merge fields and standard text.**



1. Make sure that the **Mail Merge task pane** is displayed. (Step 3 of the mail merge process should currently appear in the task pane.)

ACTION (You Do)	COMPUTER RESPONSE / Comments
1. At the bottom of the task pane, click on Next: Write your letter.	Step 4 of the mail merge process appears in the task pane.
2. Choose the Insert, Date and Time command.	The Date and Time dialog box is displayed.
3. In the list of date formats, click on the third option. Make sure that the Update automatically option is selected. Then click on the OK button.	The current date is inserted into the document.
4. Press [ENTER] four times.	The insertion point moves four lines down. You will now insert the address block.
5. In the task pane, click on Address block.	The Insert Address Block dialog box is displayed (as illustrated on the following page). Notice that the format of the selected address block is previewed at the bottom of the dialog box. In this case, you will accept the default settings.

ACTION (You Do)	COMPUTER RESPONSE / Comments
	
<p>6. Click on the OK button.</p>	<p>The dialog box is closed, and a merge field representing the address block is inserted into the document.</p> <p>NOTE: You can insert individual merge fields (for example, a field representing an individual's first name and a field representing an individual's last name) into a main document by using the Insert Merge Field dialog box. This dialog box is displayed by clicking on More items in the Mail Merge task pane.</p>
<p>7. Press [ENTER] two times.</p>	<p>The insertion point moves two lines down. You will now insert the salutation (greeting) line.</p>
<p>8. In the task pane, click on Greeting line.</p>	<p>The Greeting Line dialog box is displayed (as illustrated on the following page).</p>

ACTION (You Do)	COMPUTER RESPONSE / Comments
	
<p>9. Under Greeting line format, expand the second list box (which currently displays Mr. Randall), and click on Joshua.</p>	<p>The greeting line will include only the recipient's first name.</p>
<p>10. Click on the OK button.</p>	<p>The dialog box is closed, and a merge field representing the greeting line is inserted into the document.</p>
<p>11. Press [ENTER] two times.</p>	<p>The insertion point moves two lines down. The document should now appear similar to that illustrated below. (The date, of course, will no doubt be different.) You will now enter the standard text into the document.</p>
<div style="border: 1px solid black; padding: 20px; width: fit-content; margin: auto;"> <p style="text-align: center;">November 15, 2004</p> <p style="text-align: center;">«AddressBlock»</p> <p style="text-align: center;">«GreetingLine»</p> </div>	

ACTION (You Do)	COMPUTER RESPONSE / Comments
12. Type the following:	
<p>Enclosed is a complimentary copy of our latest brochure. As you can see, we are offering tours to several new locations this spring. We hope that you can join us.</p> <p>Yours truly,</p> <p>Joanne Jacobs Customer Services</p>	
13. Save the document in a file named Brochure.doc.	

Merging a Main Document and a Data Source

You are now ready to let Word merge your main document and data source.



Objective

In this exercise, you will **preview your main document with the variable information in your data source**. You will then **merge the two documents**.



1. Make sure that the **Mail Merge task pane** is displayed. (Step 4 of the mail merge process should currently appear in the task pane.) Also, make sure that **Brochure.doc** is still displayed.

You will begin by previewing the current document with the variable information in the associated data source.

ACTION (You Do)	COMPUTER RESPONSE / Comments
1. At the bottom of the task pane, click on Next: Preview your letters .	Step 5 of the mail merge process appears in the task pane, and the first letter is previewed. Notice that the letter includes the information in the first record of the data source.
2. In the task pane, click on the double right arrow button. 	The second letter is previewed.
3. Click again on the double right arrow button.	The third letter is previewed.
4. Click once again on the double right arrow button.	The fourth letter is previewed.
5. Click on the double left arrow button. 	The third letter is once again previewed.
6. In the task pane under Make changes , click on Edit recipient list .	The Mail Merge Recipients dialog box is displayed.

ACTION (You Do)	COMPUTER RESPONSE / Comments
7. Click in the check box for Betty Brown and in the check box for Sam Sanders .	The two check boxes are deselected, removing the two records from the mail merge. NOTE: You can add new records to the data source by using the Edit button in the dialog box.
8. Click on the OK button.	The dialog box is closed.
9. Using the procedure described above, preview the letters .	Notice that only two letters (for Mary Moore and Willy Wong) are displayed.
10. In the task pane, click on Edit recipient list .	The Mail Merge Recipients dialog box is redisplayed.
11. Click in the check box for Betty Brown and in the check box for Sam Sanders .	The two check boxes are once again selected. All records will now be included in the mail merge.
12. Click on the OK button.	The dialog box is closed. You will now merge the main document and data source.
13. At the bottom of the task pane, click on Next: Complete the merge .	Step 6 of the mail merge process appears in the task pane, which displays two options (Print and Edit individual letters).
14. Click on Edit individual letters .	The Merge to New Document dialog box is displayed.
15. Make sure that the All option is selected. Then click on the OK button.	The dialog box is closed, the two documents are merged, and the letters are displayed in a new document.
16. Scroll through the document .	Notice that each letter appears on a separate page. NOTE: Displaying the results of a mail merge in a new document allows you to personalize individual letters. You can then print the document (letters) and/or save it for later use. In this case, however, you will simply close the document without printing or saving it.
17. Choose the File, Close command.	You are asked if you want to save the changes in the main document.
18. Click on the Yes button.	The changes are saved, and the document is cleared from the screen.

NOTE: After closing a main document, you can use it again in another mail merge, as demonstrated in a later exercise.



FURTHER PRACTICE

NOTE: In this activity, you are to use the Mail Merge feature to produce a series of party invitations. Since the contents of the main document and data source are not specifically indicated, enter information of your choice in creating these files.

1. Display a **blank document**. Then **access Mail Merge**.
2. **Create** a **data source** (named **Guests**) that includes the **names** and **addresses** of three or four of your friends.
3. **Create** the **main document**, and save it in a file named **Invitations.doc**.
4. **Merge** the **main document** and **data source** to the **printer**.
5. **Clear** the **Document window**, **saving** the **changes**.

Printing Mailing Labels

The Mail Merge feature also allows you to print names and addresses on **mailing labels**, as demonstrated in the next exercise. We will discuss how this process works; however, we will not be able to print labels due to equipment constraints in this lab.



Mailing Labels

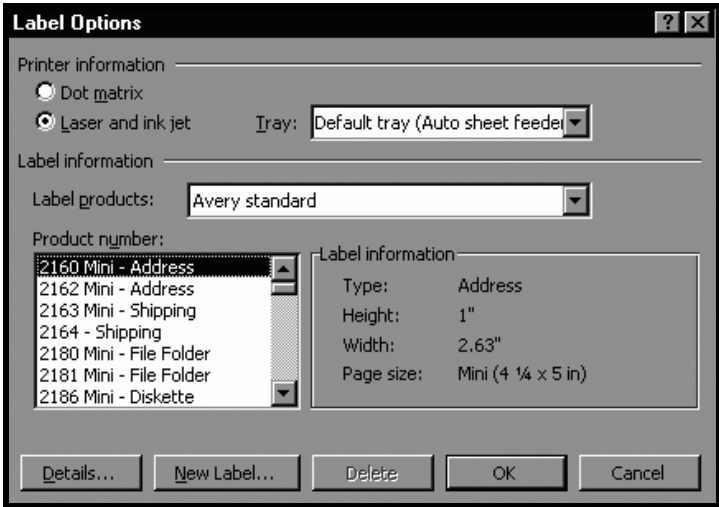
Objective

In this exercise, you will print mailing labels for individuals in your Customers data source.

NOTE: This exercise assumes that you are using a laser or inkjet printer with Avery standard mailing label sheets. (The labels should be at least one inch in height.) If this is not the case, you will need to modify step 4.



1. Make sure that the Document window is clear. Then display a **blank document**.
2. If you were going to print, you would also make sure that your **printer** is supplied with the appropriate **labels**.

ACTION (You Do)	COMPUTER RESPONSE / Comments
1. Choose the Tools, Letters and Mailings, Mail Merge command.	The Mail Merge task pane is displayed.
2. Under Select document type , click on Labels .	The merge document type is selected.
3. At the bottom of the task pane, click on Next: Starting document . Under Select starting document , make sure that the Change document layout option is selected. Then click on Label options .	The Label Options dialog box is displayed (as illustrated below).
	
4. Make sure that the Laser and ink jet option is selected (under Printer information) and that Avery standard appears in the Label products box.	The printer and label options are set.
5. In the Product number box, click on the option that corresponds to the type of label you are using.	The product number is selected.
6. Click on the OK button.	The dialog box is closed.
7. At the bottom of the task pane, click on Next: Select recipients . Under Select recipients , make sure that the Use an existing list option is selected. Then click on Browse .	The Select Data Source dialog box is displayed.
8. In the list of data sources, double-click on Customers .	The data source is selected, and the Mail Merge Recipients dialog box is displayed, listing the records of the data source.

ACTION (You Do)	COMPUTER RESPONSE / Comments
9. Click on the ZIP Code field heading .	The list is sorted by zip code.
10. Click on the OK button.	The dialog box is closed.
11. At the bottom of the task pane, click on Next: Arrange your labels .	You will now insert the address block.
12. In the task pane, click on Address block .	The Insert Address Block dialog box is displayed.
13. In the Insert recipient's name in this format box, click on the Joshua Randall Jr. option.	The new format is selected.
14. Click on the OK button.	The dialog box is closed, and a merge field representing the address block is inserted into the first label in the document.
15. In the task pane under Replicate labels , click on the Update all labels button.	The same merge field is inserted into all remaining labels.
16. Save the main document in a file named Customer Labels.doc .	Next, you will preview the current document with the variable information in the associated data source. You will then print the labels.
17. At the bottom of the task pane, click on Next: Preview your labels .	The mailing labels are previewed.
18. At the bottom of the task pane, click on Next: Complete the merge . Then click on Print .	The Merge to Printer dialog box is displayed.
19. Click on the OK button. Then click on the Cancel button in the Print dialog box, which is subsequently displayed.	If you were actually going to print the labels, you would click OK in the Print dialog box.
20. Close the main document, saving the changes .	The document is cleared from the screen.



FURTHER PRACTICE (Optional)

1. Create a **main mailing labels document** for use with your **Guests data source**, and **save** it in a file named **Guest Labels.doc**.
2. **Preview** the **labels**, then **close** the **main document, saving** the **changes**.

Using an External Data Source in a Mail Merge

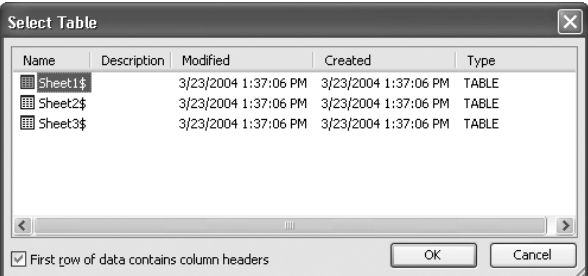
In addition to the data sources created with Word, you can also use an **external data source** when performing a mail merge. Examples of an external data sources includes a Microsoft Outlook Contact list or, as demonstrated in the next exercise, a Microsoft Excel worksheet.

Objective

In this exercise, you will perform another mail merge using a Microsoft Excel worksheet as the data source.



1. Make sure that the Document window is clear. Then **open** the **document** named **Brochure.doc**.

ACTION (You Do)	COMPUTER RESPONSE / Comments
1. Choose the Tools, Letters and Mailings, Mail Merge command.	The Mail Merge task pane is displayed. Notice that since you have already selected the starting (main) document, step 3 appears in the task pane. You will now select the recipients of the resulting letters.
2. Under Select recipients , click on Use an Existing List . Then click on Browse .	The Select Data Source dialog box is displayed. NOTE: If another data sources has been established for this main document, click on Select a different list .
3. Navigate to the testdata.xls file. Select it and click Open .	The Select Table dialog box is displayed, listing the entries in the worksheet.
<div style="text-align: center;">  </div>	

ACTION (You Do)	COMPUTER RESPONSE / Comments
4. Select Sheet 1 , make sure there is a checkmark in First row of data contains column headers , then click on the OK button.	The Mail Merge Recipients dialog box is displayed, listing the entries from the worksheet.
5. Click on the OK button to close the Mail Merge Recipients dialog box.	The dialog box is closed.
6. At the bottom of the task pane, click on Next: Write your letter . Then click on Next: Preview your letters .	
7. Using the procedure described earlier, preview the letters .	
8. At the bottom of the task pane, click on Next: Complete the merge . Then click on Edit individual letters .	The Merge to New Document dialog box is displayed.
9. Click on the OK button.	The letters are displayed in a new document.
10. Close the form letters document, without printing or saving it.	The main document is redisplayed.
11. Close the main document, without saving the changes.	The document is cleared from the screen.
12. Close the task pane .	

NOTE: For more information about the various types of data sources that can be used in a mail merge, see the Word Help system.

Summary

In this workshop, you have learned how to:

- **Create form letters.** Use **Mail Merge**, and select the **Letters** option when specifying the merge document type.
- **Access Mail Merge.** Use the **Tools, Letters and Mailings, Mail Merge** command.
- **Print mailing labels.** Use **Mail Merge**, and select the **Labels** option when specifying the merge document type.
- **Use an external data source** in a mail merge. Use **Mail Merge**, and select the **Use an existing list** option when specifying the recipients (to use a Microsoft Excel worksheet).

