Microsoft Word 2016
Mail Merge and Graphics Made Easy
Course Notes

Sample

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COURSE OBJECTIVES

By the end of this course you will be able to

- Briefly describe how to use conditional text.
- Carry out an accurate mail merge on an existing set of data, without reference to notes.
- Briefly describe how to print envelopes and labels.
- Correctly insert photographs in a document, without reference to notes.
- Correctly adjust photographs to remove backgrounds, without reference to notes.
- Create specified SmartArt in a document, referring to notes if necessary.
- Accurately create a chart in a document using supplied data, referring to notes if necessary.

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MODULE 1 – MAIL MERGE, LABELS AND ENVELOPES

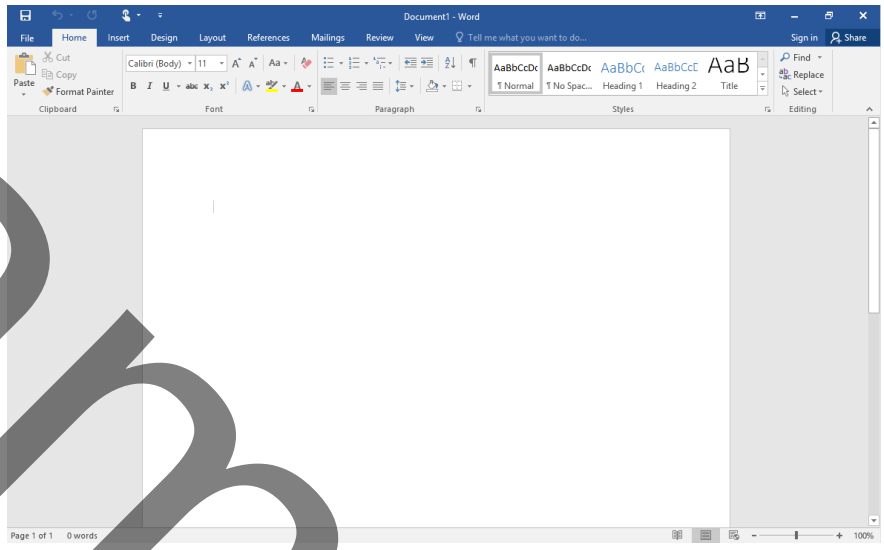
OBJECTIVES

At the end of this section you will be able to:

- Briefly describe how to use conditional text.
- Carry out an accurate mail merge on an existing set of data, without reference to notes.
- Briefly describe how to print envelopes and labels.

REVISION

Word 2016 is a very powerful word-processor. If you have used it for some time, you will appreciate that it has very many features that take it beyond simple word-processing and very close to desk-top publishing. This course will take you beyond the simple word-processing facilities into the areas that will help make the every-day user into a power user of Word 2016.



It is worthwhile revising some Word 2016 basic features before proceeding on to the other areas.

The Ribbon

The Ribbon is designed to help you quickly find the commands that you need to complete a task. Commands are organized in logical groups, which are collected together under tabs. Each tab relates to a type of activity, such as writing or laying out a page. To reduce clutter, some tabs are shown only when needed.

There is no way to delete or replace the Ribbon with the toolbars and menus from the earlier versions of Microsoft Office. However, you can minimize the Ribbon to make more space available on your screen, and you can customise it.

Status Bar

The Status Bar is displayed at the bottom of the screen. This shows you the page number and the number of pages in the document, and the word count. Other information can be displayed on the status bar by right-clicking on it and selecting other items.

MAIL MERGE

Merging is the operation of combining information from two sources to create a third single document. Word processors lend themselves very well to merging documents. Merging can be used to create form letters to send to many different people. Merging involves three operations:

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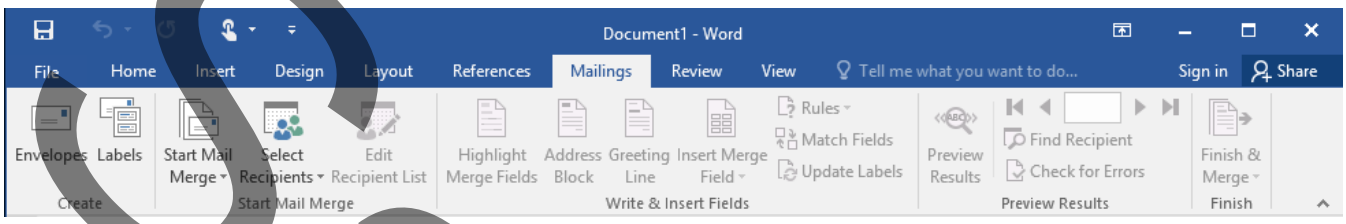
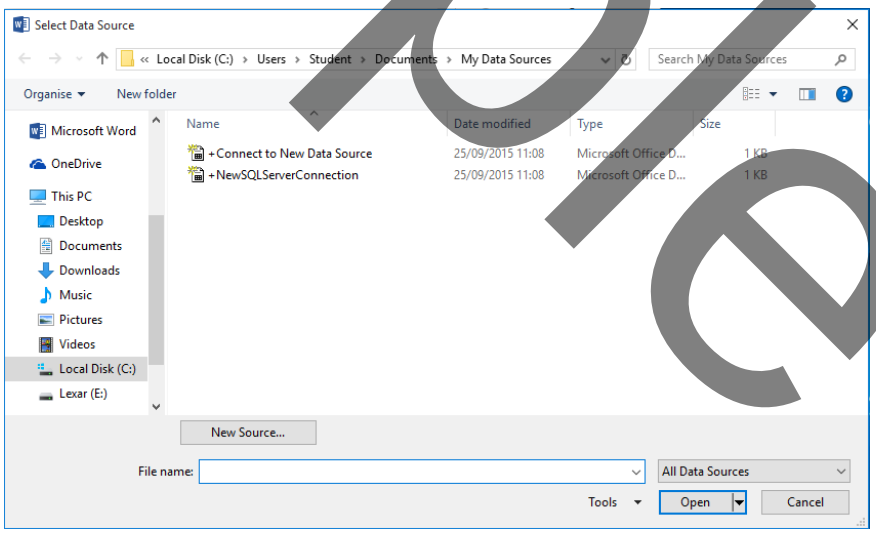
1. Creating a main document of standard information - such as a letter, mailing labels, envelopes, labels or a directory. A directory is similar to a form letter but can be used for membership lists, parts lists, etc.
2. Creating a data source of variable information - such as names and addresses. This is normally just a Word table, but it can be a database or Excel file.
3. Merging the data with the document. When the merge takes place using a directory, each set of text and fields are not started on a new page but continue down the current page, thus creating the list.

Creating the Merge Files



To commence a Mail Merge

1. Go to the *Start Mail Merge* group in the **Mailings** Ribbon.
2. Click on the **Start Mail Merge** button, and either select the *Step-By-Step Mail Merge Wizard* and follow the prompts, or choose the type of mailing and proceed to step 3.
3. Click on the **Select Recipients** button. When you mail merge you are connecting generally to an existing list of addresses from a database, a spreadsheet, or a text file. (Note: You can create a list from within Word also – see later on).
   a. If You Are Using an Existing Data Source:
      i. After clicking on the **Select Recipients** button, click on *Use existing list*.
      ii. In the Select Data Source dialog box, select the file that contains the list information that you want to use, and then click on Open.



Note: If the data source is not listed in the list of files, choose the appropriate drive and folder.

iii. Now write your letter.

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b. If You Are Using Names from an Outlook Contact List:

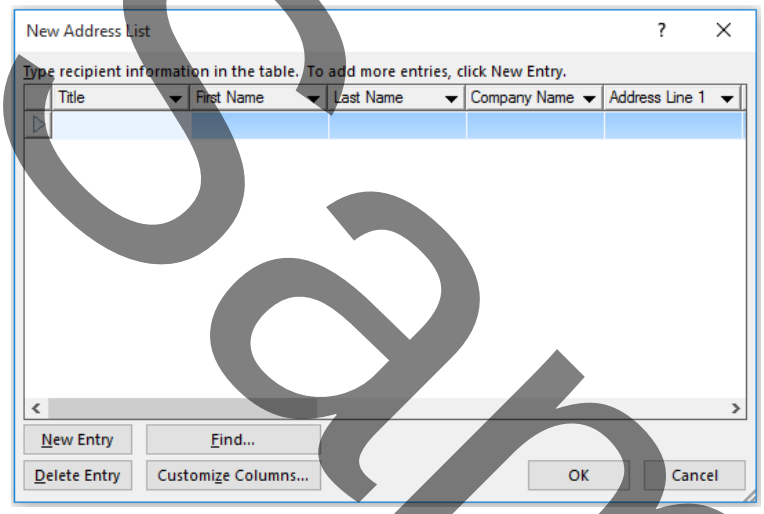
i. After clicking on the **Select Recipients** button, click on Select *Outlook Contacts*.

ii. In the *Select Contacts* dialog box, select the Outlook Contacts folder you want and then click on **OK**.

iii. Word displays the *Mail Merge Recipients* dialog box. You can sort and edit your data if you want. Click on **OK**.

iv. Now write your letter.

c. If You Are Typing the Names and Addresses for the First Time:



i. Click on Type a new list. *This will store the names and addresses in an Office Address List (which is really a single table Access database file).*

ii. The New Address List dialog box appears. In this dialog box, enter the address information for each record. If there is no information for a particular field, leave the box blank. By default, Word skips blank fields, so the merge is not affected if blank entries are in the data form. The set of information in each form makes up one data record.

iii. After you type the information for a record, click on **New Entry** to move to the next record. To delete a record, click on **Delete Entry**. To search for a specific record, click on **Find**… *Note: If you want to customize your address list, click Customize Columns. In the Customize Address List dialog box, you can add, delete, rename, and reorder the merge fields.*

iv. Back in the New Address List dialog box, click on **OK**.

v. In the Save Address List dialog box, in the File name box, type the name that you want to give your data source, and then click on **Save**.

vi. Now write your letter.

Address Block and Greeting Line

An address block and greeting line is a special field that draws information from several fields of the merged data.

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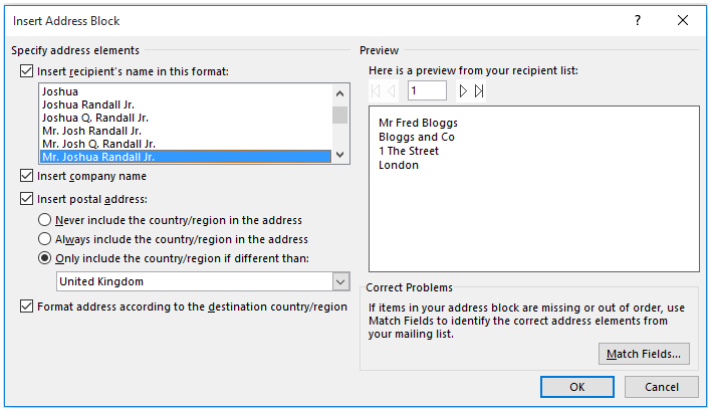
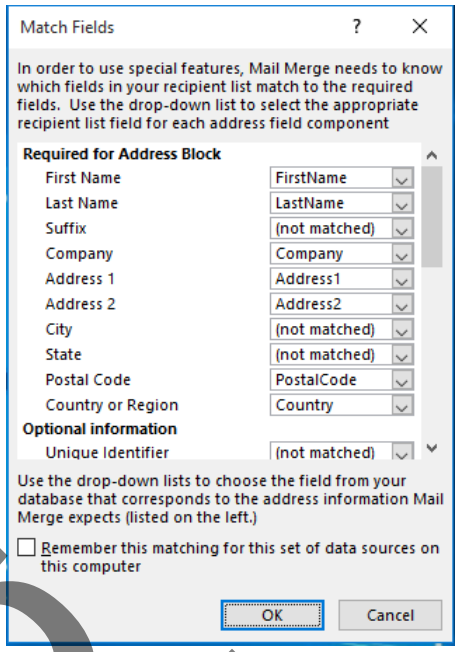
To create an address block

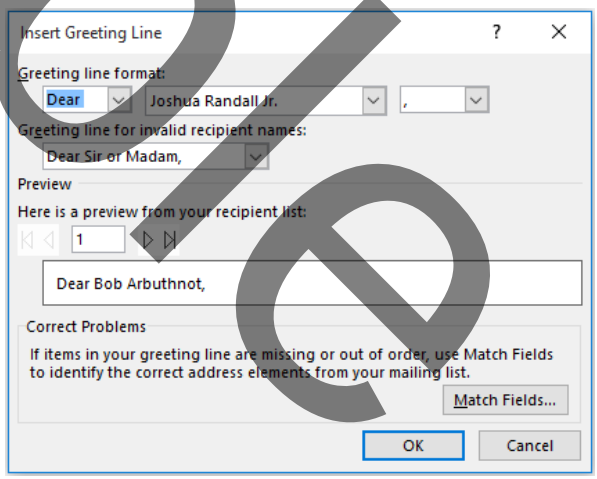


1. On the **Mailings** Ribbon, in the *Write & Insert Fields* group, click on the **Address Block** button.
2. Word will try to guess which of your merge fields should be used to make up the address block. In the displayed dialog, you will see an example of the address block in the right pane. If Word has not picked up all the fields, click on the **Match Fields** button.
3. The Match Fields dialog is displayed.
4. The left side shows fields needed for the address block. Use the drop-down selectors to select fields from your merge data that will correspond to the required information. Not all fields need to be matched and can be left as (not matched).
5. Click on **OK** to exit the Match Fields dialog.
6. Click on **OK** to insert the Address Block.



To create a greeting line

1. On the **Mailings** Ribbon, in the *Write & Insert Fields* group, click on the **Greeting Line** button.
2. Word will try to guess which of your merge fields should be used to make up the greeting line. In the displayed dialog, you will see an example of the greeting line in the preview pane. If Word has not picked up all the fields, click on the **Match Fields** button.
3. Click on **OK** to exit the Match Fields dialog.
4. Select the Greeting Line to be used for any invalid recipient names
5. Click on **OK** to insert the Greeting Line



To insert specific fields from your data source

1. On the **Mailings** Ribbon, in the *Write & Insert Fields* group, click on the **Insert Merge Field** drop-down selector.
2. Choose the relevant field name.

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To preview the merged document

1. On the **Mailings** Ribbon, in the *Preview Results* group, click on the **Preview Results** drop-down selector.
2. Use the navigation buttons in the *Preview Results* group to move through the different records in your data source.

To finish the mail merge

1. On the **Mailings** Ribbon, in the *Preview Results* group, click on the **Finish and Merge** button.
2. Choose either *Print Documents* to merge to printer or *Edit individual letters* to create a new Word document consisting of the merged results, or S*end E-mail Messages* to send the document by email.

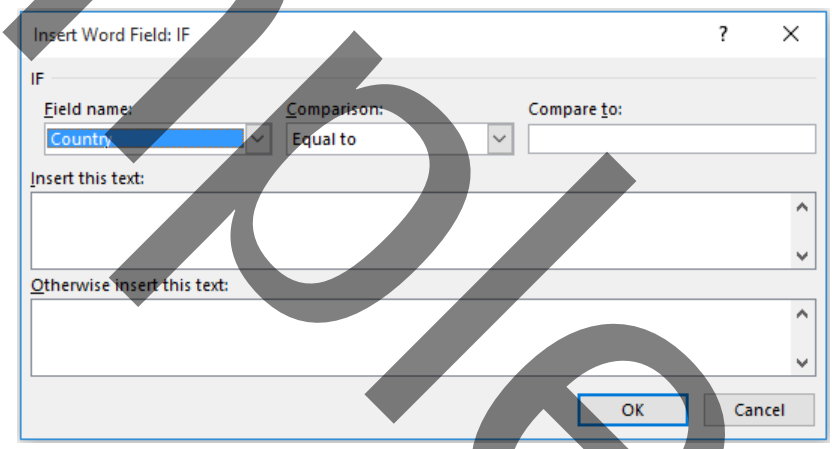
   If you choose *Edit individual letters* these become a new word document which can be saved. This new document is not connected to the data source and is a *snapshot* of the data at the time of the merge.

   If you choose email, you need to choose how the merged document is sent. You have the choice of Attachment, Plain Text (where the document text is the body of the email), or HTML (where the document becomes an HTML formatted body of the email).

Conditional Text

It is possible to insert text into a main document that is dependent upon the value of a field within the data source. For example a company could be sending a monthly statement to all it's customers and a sentence could state they are in credit or in debit depending on the account balance.

To insert conditional text



1. On the **Mailings** Ribbon, in the *Write & Insert Fields* group, click on the **Rules** button.
2. Select **If…Then…Else.**
3. Choose the field name that the condition depends upon.
4. In the *Comparison* box choose the comparison that will be used. There are several comparisons that can be used, as shown next:

Equal to	Less than or equal
Not equal to	Greater than or equal
Less than	Is blank
Greater than	Is not blank

5. Type the compare to value in the *Compare to* box. Part entries or wildcards cannot be used.

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EXERCISE 1

1. Create the mail merge main document shown below using the Excel worksheet file **Mail merge**. The entire spreadsheet is used.
2. Where the letter below says 'overdrawn/in credit' do not type that phrase but do the following:
   in the *Write & Insert* group of the Ribbon, use the *Rules* option to insert an 'If…Then…Else' field. Set the comparison to *Greater than or Equal*, and set the value to zero(entered as 0). Have the rule display text of either *overdrawn* or *in credit*.
3. Carry out a mail merge to a new document.
4. Check the new documents to ensure the conditional merge field has worked correctly.
5. Save the merged file as **Statement**

Account Statement

«Address Block»

«Greeting Line»

The «Company» account for this month is currently «Current_Balance» overdrawn/in credit

Yours sincerely

M Smith

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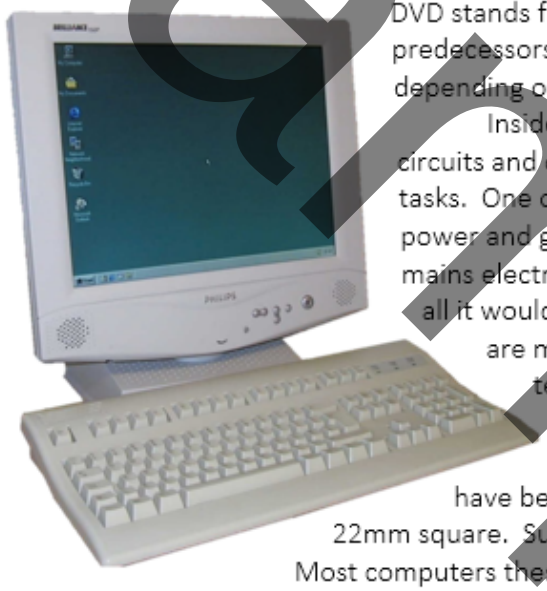
EXERCISE 2

1. Open the **Computers** document.
2. Insert the photo of a computer and place it in the document as shown below with word-wrapping set to Tight.
3. Remove the background of the picture so it looks like the extract shown below.
4. Now compress the picture using document resolution.
5. Finally close the new document and name it **Art**.

The various components that make up a PC are collectively known as the computer 'hardware'. Some of the items are inside the computer case and some are outside as pieces of equipment in their own right. The screen or monitor is one external item. The keyboard is another, as is the mouse (no not the rodent kind). The keyboard and the mouse are both input devices. In other words they are used by an operator to communicate with the computer. The monitor is an output device. The computer uses it to communicate with the operator. If there is a printer connected to the computer then that is also a device the computer can use to communicate.

Computers also make use of optical drives. These are generally called DVD drives – DVD stands for Digital versatile Disk. DVD Drives, and their predecessors CD drives operate at different speeds depending on the disk type being used.



Inside the computer case are loads of different circuits and other items that help the computer carry out its tasks. One of these is a power supply which takes in mains power and gives out 12 Volt and 5 Volt supplies. If the mains electricity was put straight into the computer circuits all it would be good for afterwards is making toast! There are memory circuits to store information temporarily, circuits used to send signals along cables to printers and circuits to read the keyboard so the computer knows what keys have been pressed. The computer chip itself is about 22mm square. Such a big box for something so small!

Most computers these days also have disk drives inside the box. One or two are floppy disk drives and these can be seen from the outside. Another type of disk drive is the hard disk which is located inside the main box. The hard disk is a permanent metal disk and is the one that holds most of the every-day programs that are used. When one of these programs is run by the computer, the program information is put into the computer's memory chips and the computer starts carrying out the instructions.

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