

Creating a Manual and Using Mail Merge



LESSON OUTLINE

- 7.1 Formatting Text with Styles
- 7.2 Navigating with the Navigation Pane
- 7.3 Changing Word Window Views
- 7.4 Introducing Mail Merge
- 7.5 Working with the Data Source
- 7.6 Working with Main Documents
- 7.7 Conducting a Merge
- 7.8 Working with Merge Problems
- 7.9 Using Envelopes and Labels with Mail Merge
- 7.10 Concepts Review

Reinforce Your Skills

Apply Your Skills

Critical Thinking & Work-Readiness Skills

LEARNING OBJECTIVES

After studying this lesson, you will be able to:

- Format documents with styles
- Create custom styles
- Modify styles
- Control document margins
- Use helpful techniques for navigating and viewing documents
- Set up a Mail Merge document and labels

Word provides a variety of tools that are particularly suited to working with multipage documents. Styles offer a powerful means of ensuring formatting consistency throughout large documents. Special navigation features make it easy to move around long documents, and the Split and Arrange All views make it easy to work with long documents and multiple documents. In this lesson, you will work with these tools as you create an employee policy manual. You will also use Mail Merge to create a form letter to send to employees and set up mailing labels for envelopes.

Student Resources

labyrinthelab.com/word10

CASE STUDY

Formatting and Distributing a Policy Manual

Jenna Mann is the administrative assistant for Green Clean, a successful, environmentally conscience janitorial service company. She has been tasked with the job of producing an employee policy manual to distribute to all Green Clean employees. Jenna's Microsoft Office expertise lets her take advantage of the variety of tools Word offers. She uses Word's built-in styles to format the manual's headings, thus ensuring consistent formatting throughout the document. If she decides to modify a style, Word automatically updates all text associated with that style. When she's finished with the policy manual, Jenna will use Mail Merge to insert the employee's name into a form letter and create mailing labels. Mail Merge will save Jenna many hours that she would have otherwise spent addressing each letter individually.

green
clean



Purpose of This Manual

The purpose of this manual is to inform you about Green Clean's business practices, employment policies, and benefits provided to you as a valued Green Clean employee. No employee manual can answer every question, so you should feel free to ask questions of your supervisor. Also, feel free to contact the Human Resources department if you have any questions or concerns. It is our desire to keep an open line of communication between you and the company.

Notice

Green Clean reserves the right to modify, amend, and update the policies outlined in this manual at any time. No oral or written statement by a supervisor, manager, or department head may be interpreted as a change in policy, nor will it constitute an agreement with an employee. This manual represents the sole agreement with respect to benefits between the employee and Green Clean. If this manual is updated, you will be given replacement pages for those that have become outdated. A copy will also be placed on our intranet site.

Your Green Clean Benefits

You may not have thought about it, but the value of your benefits amounts to a considerable sum each year in addition to the salary you earn. These are just some of the benefits Green Clean provides to eligible employees each year:

- Credit union membership
- Dental insurance
- Disability leave of absence
- Education assistance
- Employee assistance program
- Group-term life insurance
- Health insurance
- Paid holidays
- Paid vacations

Word 2010's Quick Styles gallery makes it easy to apply professional formatting to a document in mere seconds.

7.1 Formatting Text with Styles

Video Lesson

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A *style* is one of the most powerful formatting tools in Word. A style is a group of formats identified by a unique style name, such as Heading 1. It enables you to rapidly apply multiple formats to a block of text. Styles not only create consistent formatting throughout a document, they allow you to make global formatting changes by modifying the style definition. When you modify a style, the changes are applied to all text formatted with that style.



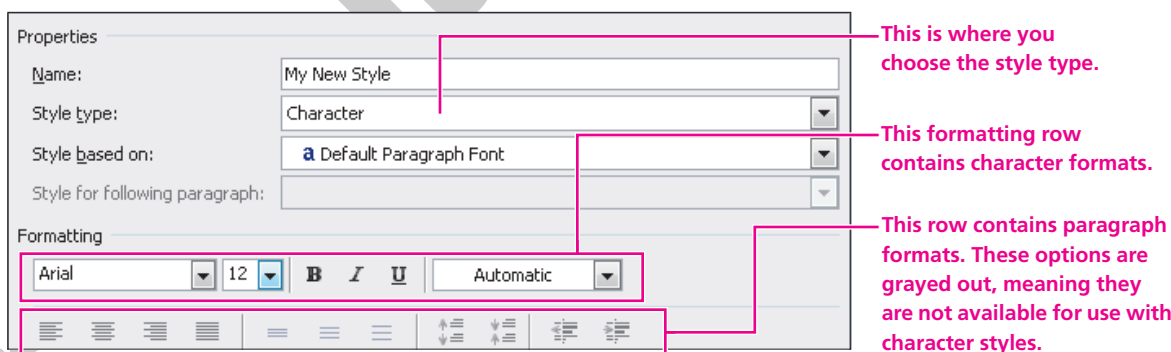
Remember, anything that ends with a paragraph symbol is considered a paragraph. A heading line is considered a paragraph because it ends with a paragraph symbol.

Types of Styles

Word supports several kinds of styles, as discussed below.

- **Character styles**—Character styles are applied to the word the insertion point is in or to a selected group of words. Character styles can only contain character formats, not paragraph formats. You can apply character styles to text *within* a paragraph that is formatted with a paragraph style. The character style overrides the formats applied by the paragraph style.
- **Paragraph styles**—Paragraph styles are applied to all text in selected paragraphs or to the paragraph containing the insertion point. You can use any character or paragraph formats in a paragraph style. For example, you may want to format a heading with a large, bold font (character formatting) and apply paragraph spacing before and after the heading (paragraph formatting).

When you create a new style, whether it's a character or a paragraph style, you use the Create New Style from Formatting dialog box. A character style is being created in the following illustration.



- **Linked styles**—Linked styles (paragraph and character) can behave as either character or paragraph styles. If you simply position the insertion point in a paragraph and apply a linked style, it formats the entire paragraph. If you select a word or several words first, and then apply the style, it applies only to the selected words.
- **List styles**—This feature makes it easy to convert text to a list and to ensure consistency among multiple lists in a document.
- **Table styles**—Table styles can provide consistent formats for multiple tables within a document.

The Normal Style

You are always working within a style in Word. The default style for Word is the *Normal* style. It contains the default formatting that you are familiar with, such as the default Calibri font, the 1.15 line spacing, and so forth.

Quick Styles

Word's Quick Styles gallery contains a group of styles designed to complement each other, and they are based on the current document theme. The gallery contains styles for headings, titles, lists, and special character formatting. Live Preview makes it easy to test a variety of styles in your document before you actually apply the style. The Quick Styles gallery is in the Styles group on the Home tab. When you use a style from the gallery, it then becomes visible in the gallery on the Ribbon without scrolling or opening the gallery. This makes it convenient should you wish to apply the same style several times in a row.

The Quick Styles gallery.



Use these buttons to scroll up and down in the gallery.

The More button displays the entire gallery at once.




The Quick Styles gallery does not contain all of Word's built-in styles. There are many more styles available, as you will see later in this lesson.

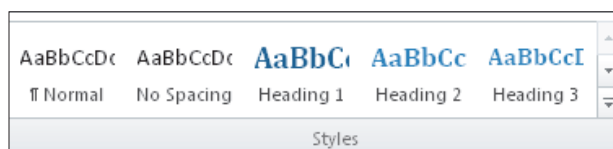
DEVELOP YOUR SKILLS 7.1.1

Preview Quick Styles

In this exercise, you will open a document that contains the content for Green Clean's employee policy manual. Then you will use Live Preview and Quick Styles to decide on the styles you wish to use to give the manual a professional, polished look.

1. Start **Word**, and make sure the Word window is **maximized** .
2. **Open** the Employee Policy Manual document from your Lesson 07 folder.
This document uses Word's default formatting, with the exception of headings, which are bolded to make them easy to locate.
3. Position the **insertion point** in the first line of the document.
4. Follow these steps to examine the Quick Styles gallery in the **Home**→**Styles** group on the Ribbon:

A Scroll down row-by-row through the gallery. (This is tedious, and makes it difficult to get an idea of all the styles available.)



B Click the **More** button to display the entire gallery.

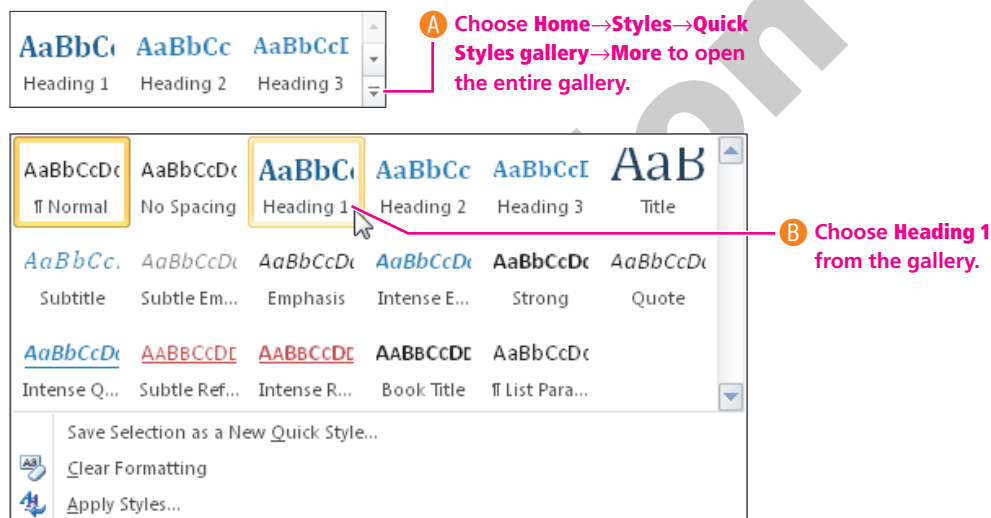
5. Hover the **mouse pointer** over the Heading 1, Heading 2, and Title styles to see the Live Preview effect.
One of these styles would be appropriate for the first main heading in the document.
6. Hover the **mouse pointer** over some of the other styles.
You can tell which styles are strictly character (versus paragraph) styles. During Live Preview, they only affect the word where the insertion point is located. With character styles, if you intend to format more than one word, you must select the words prior to applying the style.

Apply the Title Style

7. Click the **Title** style to apply it to the heading.
8. Position the **insertion point** in the next heading line, *You're Part of Our Team*.

Apply Heading 1 and Heading 2 Styles

9. Follow these steps to apply a Heading 1 style to the selected heading:



10. Apply **Heading 1** to the other bolded headings on page 1.
11. **Scroll** to the top of the second page, place the **insertion point** in the first heading, and apply the **Heading 1** style.
12. Position the **insertion point** in the next heading line *Notice*, and apply the **Heading 2** style from the gallery.
13. Apply **Heading 1** to the next heading, *Your Green Clean Benefits*.


Convert Text to a List Style

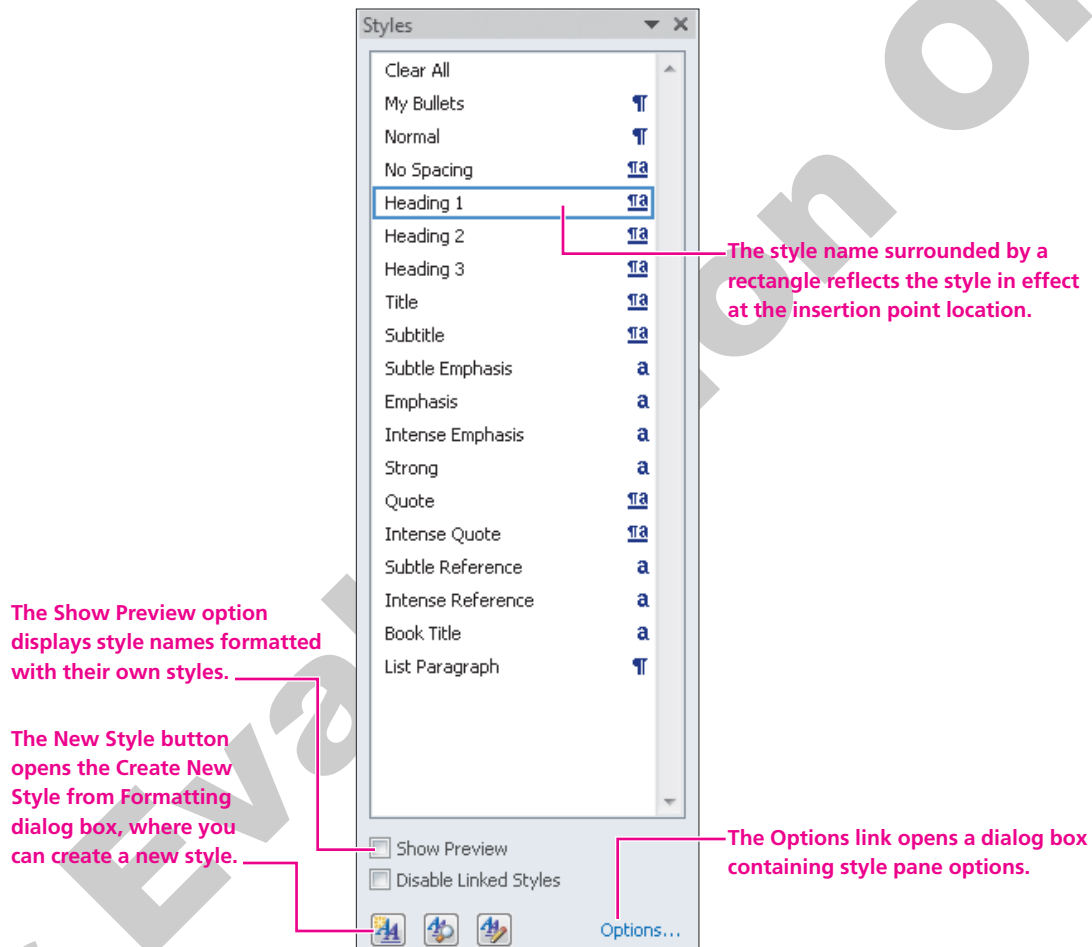
14. On the **second page**, select the benefits from *Credit union membership* through *Paid vacations*.
15. Open the gallery, and choose the **List Paragraph** style—the last one in the gallery.
Notice that the List Paragraph style is now visible in the gallery on the Ribbon without scrolling or opening the gallery.

16. For each of the next three pages, apply the **Heading 1** style to the first heading on the page and the **Heading 2** style to the remaining headings on the page.
17. **Save** the file and leave it **open**; you will use it throughout the rest of the lesson.

Viewing All Styles

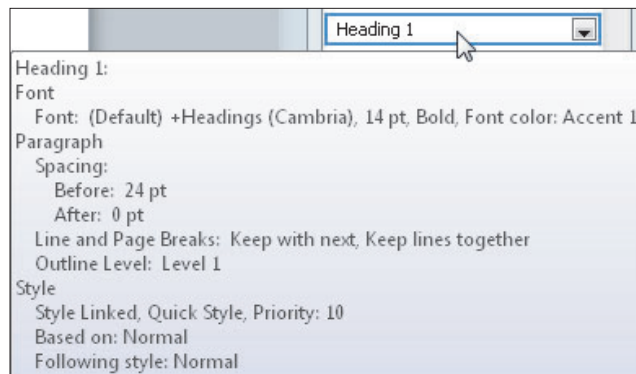
Video Lesson labyrinthlab.com/videos

Clicking the dialog box launcher  in the bottom-right corner of the Styles group displays the Styles task pane. It lists all the styles present in the current Quick Styles gallery.




Reveal Style Formatting

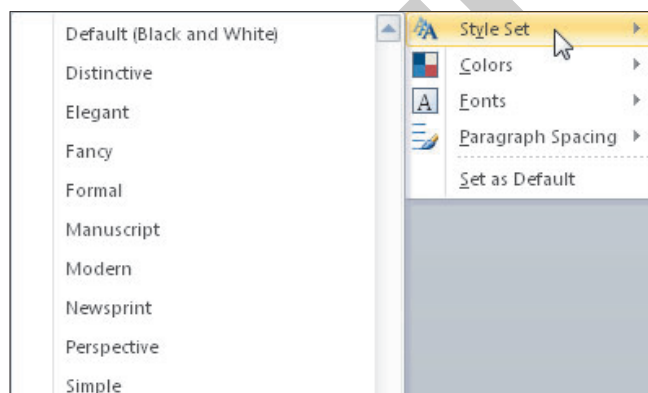
To see all of the formats involved in a style, hover the mouse pointer over the style name in the Styles pane, and a pop-up menu appears, describing the font and paragraph formatting contained in the style.



Changing the Quick Style Set

Word comes with a variety of Quick Style sets that you can display in the Quick Styles gallery. This enhances the array of styles available directly from the Ribbon. All of the styles in a set are coordinated to work together. Selecting a new style set affects only the current document you are viewing. If you switch to a different open document, the style set chosen for that document will display.


When you click the Change Styles  button in the Styles group, Word displays a menu from which you can choose the Style Set command to display a submenu of Word's built-in sets.



DEVELOP YOUR SKILLS 7.1.2

Change the Style Set

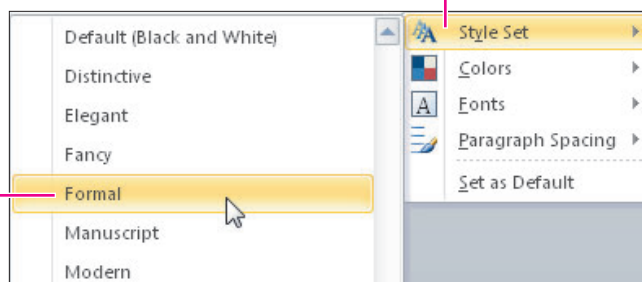
In this exercise, you will explore Word's style sets and apply a new style set.

1. **Scroll** to the top of the document.
2. Choose **Home**→**Styles**→**Change Styles**  from the Ribbon.

3. Follow these steps to choose a new style set:

A Click **Style Set** from the menu to display the style sets.

B View the **Live Preview** of various style sets, and then click **Formal** to apply that style to the document.



4. **Scroll** through the document to see the impact of the new style.

5. Open the **Quick Styles** gallery to see the formatting of the other styles in the **Formal** set.

6. **Click** in the document to close the gallery.

Apply the Word 2010 Style Set

7. Choose **Home**→**Styles**→**Change Styles**  from the Ribbon.

8. Choose **Style Set** from the menu, and then choose **Word 2010** from the submenu to return to the original look.

Creating a New Custom Style

Video Lesson


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Thus far, you have applied built-in styles. However, there may be situations where the built-in styles do not meet your needs. For example, you may have corporate formatting standards set for different types of documents. You can create custom styles to meet those standards.

There are two approaches you can take to create custom styles. The method you choose is a matter of personal preference; both are equally effective.

- **Define a style by definition**—When creating a custom style in the Create New Style from Formatting dialog box, one option is to open the dialog box and choose all formats from within the dialog box.
- **Define a style by example**—The other option is to format a block of text with the formats you wish to include in your style. Then select the text, and when you open the dialog box, you will see that Word copies the formats from the selected text into the dialog box. At this point, you can make additional formatting selections if you wish.

Making Detailed Style Settings

Clicking the New Style  button at the bottom of the Styles task pane displays the Create New Style from Formatting dialog box. You can use this dialog box to set all of the formatting for a new style, or use it to tweak the formatting of a style you are creating from selected text. For example, after setting all the formatting to create a style by example, you may want to open this dialog box to choose the style for the following paragraph.

The Formatting section provides easy access to common character and paragraph formats. The formats you choose will be applied to the style.

Check this checkbox if you want your new style to appear in the Quick Styles gallery.

In addition to character and paragraph formats, you can access all other formatting options, including Tabs and Borders, via the Format button.

You enter a name for your style here.

Here you specify the type of style, such as Character or Paragraph.

If you wish, you can base a style on another style, and then modify the formats as you wish to create your new style.

When you use a paragraph style and tap [Enter], the style specified here is used to format the following paragraph. (This option is not available for character styles.)



Choosing one of these two option buttons specifies whether your new style will be available in this document only or in all documents based on the current template. In our example, that is the default Normal template. This means your new style would be available in all new documents based on the Normal style.

DEVELOP YOUR SKILLS 7.1.3

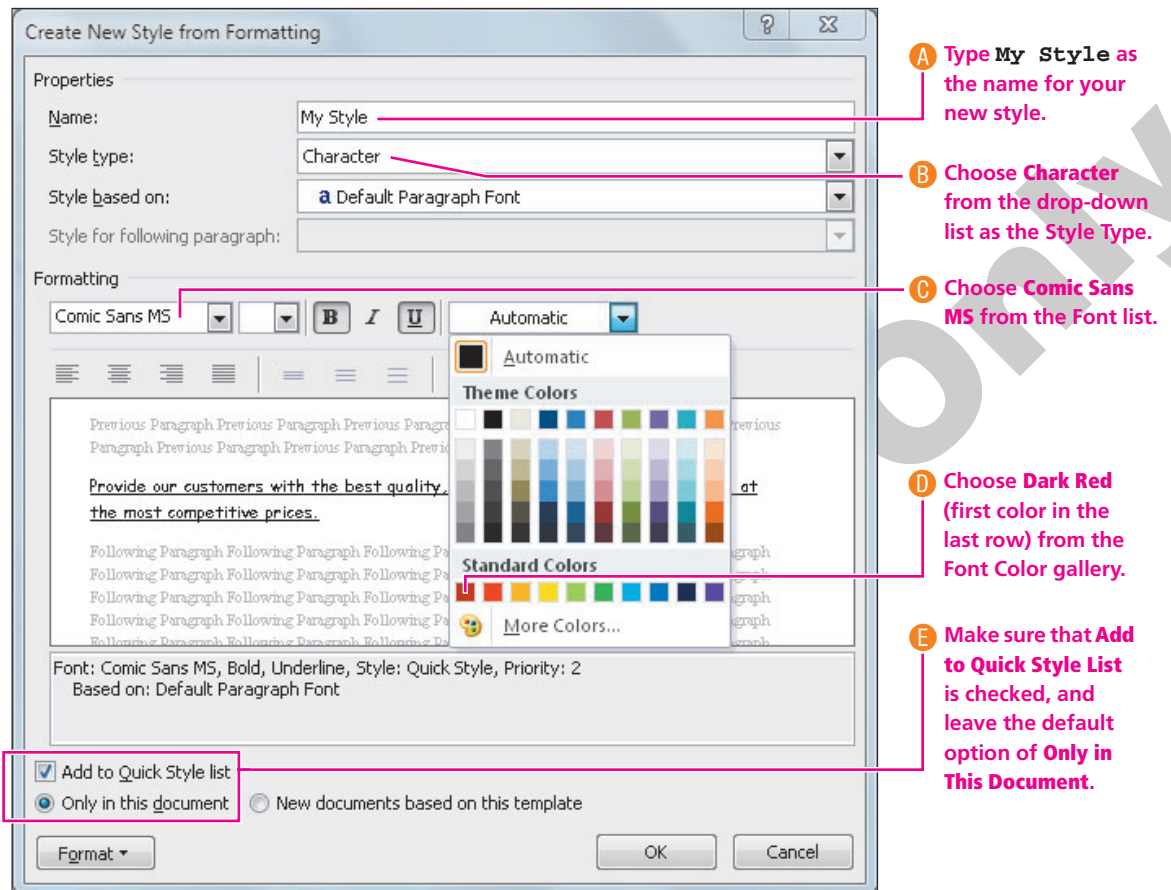
Create a New Style

In this exercise, you will create a new character style and apply the style to selected blocks of text.

Create a Custom Style

1. On the **first page**, locate the heading *Green Clean Is Committed to Two Goals*.
2. In the first paragraph below the heading, **select** the words *best quality, eco-friendly products and services*.
3. Using the Mini toolbar, apply **Bold** **B** and **Underline** **U** to the selected text.
4. If necessary, choose **Home**→**Styles**→**dialog box launcher**  in the bottom-right corner of the Styles group on the Home tab to display the Styles task pane.
5. Click the **New Style**  button, the far left button at the bottom of the Styles task pane, to display the **Create New Style from Formatting** dialog box.

6. Follow these steps to complete the new style by definition:



7. Click **OK** to finish creating the style and to apply it to the selected text.

Apply Your New Style

8. Select the words *above average compensation* in the next paragraph.

9. In the Quick Styles gallery, click your new **My Style** to apply it to the selected text.

10. Click anywhere in the document to deselect the text.

11. Save  your file, and continue with the next topic.

Modifying, Removing, and Deleting Styles

Video Lesson

labyrinthlearning.com/videos

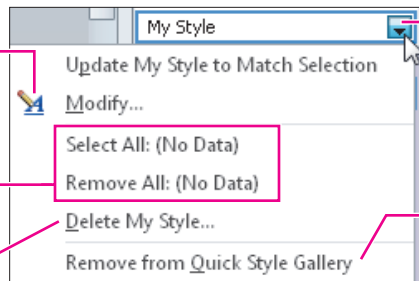
You can modify built-in styles as well as styles that you create. The ability to modify styles is one of the great powers of Word. Imagine, for example, that you used a heading style that contained a font change, point size change, font color change, bold, and italic, and you applied that style to twenty headings in a long document. Later you decide that you don't like the italic formatting. Rather than going to all twenty headings and removing italics, just modify the style, and all text with that style applied will update immediately.

You can remove a style from the Quick Styles gallery without removing it from the Styles task pane. You can leave it in the task pane for future use, or if you prefer you can delete it from the task pane. Take a moment to examine several of the commands in a style's menu in the Styles task pane.

This option allows you to modify a style.

These two commands appear only when you set the Style task pane options to show the formatting as styles.

This command deletes the style completely.



Hovering the mouse pointer over the style name causes the drop-down arrow to appear. Clicking the arrow displays a menu of options.

You can use this command to remove a style from the Quick Styles gallery.

QUICK REFERENCE

USING WORD STYLES

Task	Procedure
Apply a style	<ul style="list-style-type: none"> Apply a character style by selecting the words to be formatted and then choosing a style from the Quick Styles gallery on the Home tab or from the Styles task pane. Apply a paragraph style by clicking in the paragraph and then choosing a style from the Quick Styles gallery on the Home tab or from the Styles task pane. If you want to apply a style to more than one paragraph at a time, you must select the paragraphs.
Create a new style by definition	<ul style="list-style-type: none"> Click the New Style button at the bottom of the Styles task pane to open the Create New Style from Formatting dialog box. Choose all desired formats from within the dialog box.
Create a new style by example	<ul style="list-style-type: none"> Format a block of text with the desired formats. Click the New Style button at the bottom of the Styles task pane to open the Create New Style from Formatting dialog box. Word copies the formats from the block of formatted text. You can make additional format changes within the dialog box if you wish.
Modify a style	<ul style="list-style-type: none"> In the Styles task pane, hover the mouse pointer over the style to be modified. When the drop-down arrow appears, click it to display the menu. Choose Modify from the menu to display the Modify Style dialog box.
Add a style to the Quick Styles gallery	<ul style="list-style-type: none"> In the Styles task pane, hover the mouse pointer over the style to be added. When the drop-down arrow appears, click it to display the menu. Choose Add to Quick Style Gallery from the menu.
Remove a style from the Quick Styles gallery	<ul style="list-style-type: none"> In the Styles task pane, hover the mouse pointer over the style to be removed. When the drop-down arrow appears, click it to display the menu. Choose Remove from Quick Style Gallery from the menu.
Delete a custom style	<ul style="list-style-type: none"> In the Styles task pane, hover the mouse pointer over the style to be deleted. When the drop-down arrow appears, click it to display the menu. Choose Delete [style name] from the menu.

DEVELOP YOUR SKILLS 7.1.4

Modify and Remove a Quick Styles

In this exercise, you will modify a style to see how it impacts all text formatted with that style. Then you will remove the style from the Quick Styles gallery. The Styles task pane should still be open.

1. Hover the **mouse pointer** over My Style in the Styles task pane to display the drop-down arrow.
2. **Click** the arrow to display the menu.
3. Choose the **Modify** command from the menu to open the Modify Style dialog box.
This dialog box contains the same elements as the Create New Style from Formatting dialog box.
4. Click the **Italic** button to add italic formatting to the style.
5. Click **OK** and notice that both blocks of text formatted with My Style updated with the modification.

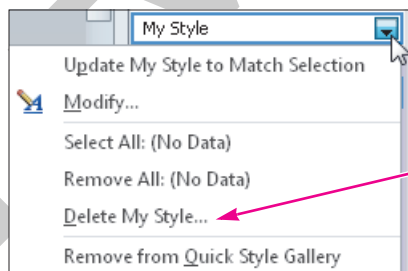




Remove a Style from the Quick Styles Gallery

6. In the Styles task pane, click the drop-down arrow for **My Style** again to display the menu.
7. Choose **Remove from Quick Styles Gallery** from the menu.
Notice that removing the style from the Quick Styles gallery does not remove the formatting from the text with that style.
8. Open the **Quick Styles** gallery, and notice that your new style no longer appears in the gallery.
9. **Click** in the document to close the gallery.

Delete a Style from the Styles Task Pane

10. Display the **My Style** menu in the Styles task pane again.
11. Choose **Delete My Style** from the menu.




12. When the message appears verifying that you want to delete the style, click **Yes**.
Notice that the My Style formatting has been removed from the two blocks of text in the document, and that My Style no longer appears in the Styles task pane.
13. Click the **Close**  button in the upper-right corner of the Styles task pane.
14. **Save**  your file, and leave it **open** for the next topic.

7.2 Navigating with the Navigation Pane

Video Lesson

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 One of the options in the new Navigation pane is to use the Browse the Headings in your Document button to maneuver around in a document quickly. This option is activated only when you have assigned Heading styles to text. To do so, open the Navigation pane from the Editing group on the Home tab of the Ribbon.

Rearranging Sections

Rearranging sections is one of the most powerful uses of the Navigation pane. When you create a document, you may decide to change the order of topics later. Although you could use the Cut and Paste method to rearrange the document, using the Navigation pane is much easier because you can drag the headings up and down the pane to reposition them. When you drag a heading to a new location, all of its lower-level headings and paragraph text move right along with it. For example, you may have a Heading 1 followed by a paragraph, followed by a Heading 2 with its own paragraph. When you move the Heading 1, Word also moves the Heading 1 paragraph, the Heading 2, and the Heading 2 paragraph all as one section.

QUICK REFERENCE


REARRANGING A DOCUMENT USING THE NAVIGATION PANE

Task	Procedure
Display headings in the Navigation pane	<ul style="list-style-type: none"> Choose Home→Editing→Find from the Ribbon to open the Navigation pane. Click the Browse the Headings in Your Document button in the Navigation pane.
Rearrange a section	<ul style="list-style-type: none"> Click and drag a heading in the Navigation pane up or down to a new location.

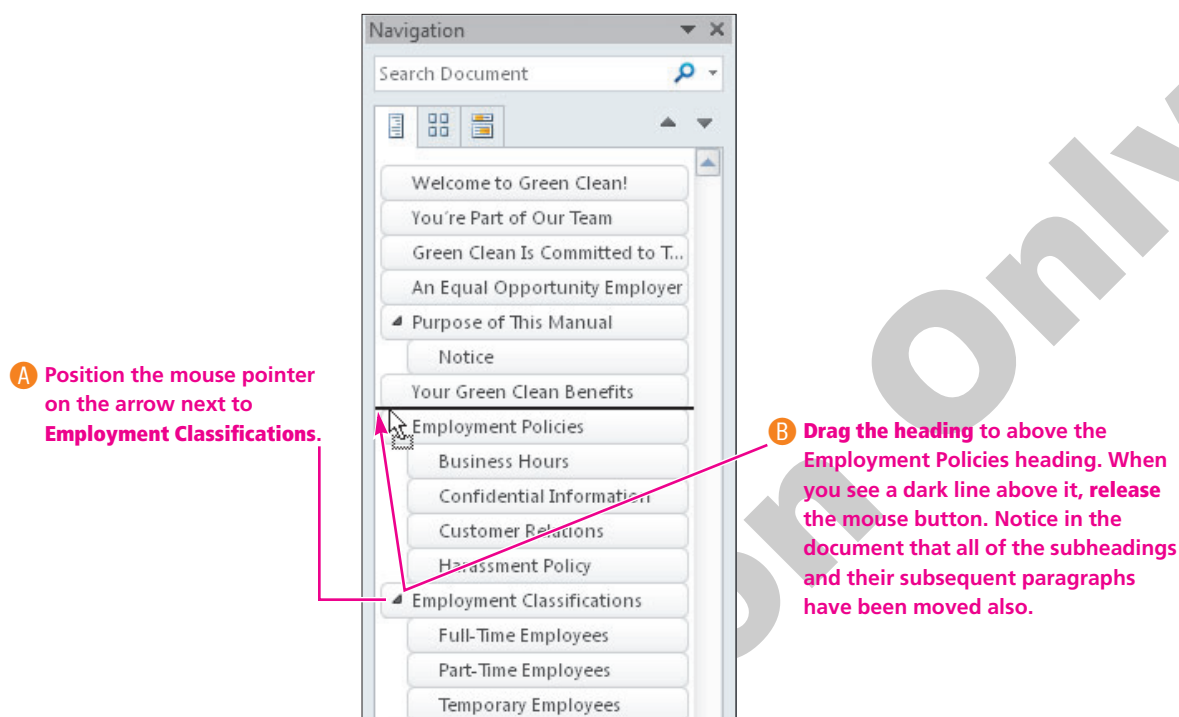
DEVELOP YOUR SKILLS 7.2.1



Rearrange a Document Using the Navigation Pane

In this exercise, you will rearrange the order of sections in a document by dragging headings in the Navigation pane.

1. Choose **Home**→**Editing**→**Find** from the Ribbon to open the Navigation pane.
2. Click the **Browse the Headings in Your Document**  tab to display the text that is formatted as headings.

3. Follow these steps to move the Employment Classifications section above the Employment Policies section:



4. **Scroll** through the document to see changes.
5. Using the same technique, **move** the *Employment Policies* heading back above the *Employment Classifications* section.
6. Tap **Ctrl** + **Home** to position the insertion point at the top, then close  the Navigation Pane.
7. **Save**  the file and leave it **open** for the next exercise.

7.3 Changing Word Window Views

Video Lesson

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Word provides many different ways of viewing your documents on the screen. The Arrange All command arranges all open Word documents on the screen. Initially, it displays the windows horizontally, one above the other. You can also view the two windows side-by-side vertically. Whichever view the two documents are in, you can choose to scroll through them separately or simultaneously. You might use this view with the synchronous scrolling option to compare two versions of a document, as an example. The Split command splits a document's window into two individual windows that you can scroll separately. This provides the ability to compare two different parts of the same document next to each other.

QUICK REFERENCE

WORKING WITH WORD WINDOW VIEWS

View	Procedure
Arrange All	Choose View→Window→Arrange All from the Ribbon.
View Side by Side	Choose View→Window→View Side by Side from the Ribbon.
Split	Choose View→Window→Split from the Ribbon.

How the Split Bar Works

When you choose View→Window→Split  from the Ribbon, Word displays the split bar, which spans the width of the window. The mouse pointer looks like a double-headed arrow.



The split bar moves when you move the mouse. You position the mouse pointer where you want the split bar on the screen, and then click the mouse button to anchor the bar.



DEVELOP YOUR SKILLS 7.3.1

Use the View Side By Side and Split Views


In this exercise, you will use the View Side by Side command to display both open Word documents at the same time and scroll through both documents at the same time. Finally, you will use the Split command to split your Employee Policy Manual into two windows, which you can scroll separately.

Use the View Side By Side View

1. **Open** the Original Employee Policy Manual document from the Lesson 07 folder.
2. Choose **View→Window→View Side by Side**  from the Ribbon.
The documents now appear next to each other in separate windows. Each window has its own scroll bar.
3. **Scroll down** and then back **up** to the top using the scroll bar on the Original Employee Policy Manual.
These are actually two separate files, each with its own title bar, Ribbon, and scroll bar. Notice that both documents scroll simultaneously instead of separately.
4. Choose **View→Window→Synchronous Scrolling**  from the Ribbon on the Original Employee Policy Manual.

5. Take a moment to **scroll** through each window.
Notice that each window scrolls independently from the other.
6. Click the **Close**  button in the upper-right corner of the Original Employee Policy Manual document to close it.
7. If necessary, **maximize**  the Employee Policy Manual window.



Split the Document Window

8. Choose **View**→**Window**→**Split**  from the Ribbon.
Word displays the split bar, which horizontally spans the width of the window. The mouse pointer appears as a double-headed arrow attached to the split bar.
9. Drag the **mouse pointer** up and down to change the position of the split bar.
10. Move the **split bar** to the center of the screen, and click to anchor the bar.



You can place the mouse pointer on the split bar at any time and drag to reposition it.

Notice that each part of the split window has its own scroll bar.

11. Take a moment to **scroll** both sections of the window independently.
Splits are handy for positioning separate parts of the same document next to each other for comparison purposes.
Notice that the Split command on the Ribbon changed to Remove Split.
12. Choose **View**→**Window**→**Remove Split**  to put the split bar away.
13. **Save**  your file, and **close** it.

7.4 Introducing Mail Merge

Video Lesson

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Word's Mail Merge feature is most often used for generating personalized form letters, mailing labels, and envelopes. However, Mail Merge is a versatile tool that can be used with any type of document. Mail Merge can be a big time-saver and is invaluable for managing large mailings. When you perform a merge, you have the option to merge directly to a printer or to a new document.

Components of a Mail Merge

Merging creates a merged document by combining information from two or more documents. The documents are known as the *main document* and the *data source*.

- **Main Document**—This document controls the merge. It contains the fixed information into which the variable information for each contact is merged. In a typical form letter, for instance, you will have a different name and address on each letter, while the rest of the text is the same for everyone receiving the letter.



Remember that whatever text is to be included in every letter should be typed in the main document.

- **Data Source**—This can be another Word document, a spreadsheet, a database file, or a contacts list in Outlook. When creating the data source, keep in mind how you want to use the data in the merge. For example, if you want the letter to be addressed informally using the first names, then in the data source, there must be a separate column (field) for the first name.
- **Merged Document**—This document is the result after you perform the merge. It contains all of the individual letters addressed to each individual in the data source you used. You can save this document, if you wish, or simply close it without saving after you print.

You can merge an existing main document with an existing data source, or you can create the main document and data source while stepping through the merge process.

719 Coronado Drive
San Diego, California 92102

Today's Date

«AddressBlock»

«GreetingLine»

I want to take this opportunity to thank you for your continued dedication in the «Department» department. Some of you are new to us and some have been with us for many years. We hope that all of you have enjoyed your tenure with us thus far.

Enclosed is a copy of our revised Employee Policy Manual. Please read through it and if you have any questions or concerns, please contact your supervisor or Kenneth Hazell, Human Resources Director.

«First_Name», thank you again for your company loyalty.

Sincerely,

Ahn Tran
Office Manager

<input checked="" type="checkbox"/>	Last Name	First Name	Title	Address Line 1	City	State	ZIP Co...	Departm...
<input checked="" type="checkbox"/>	Adams	D'Andre	Mr.	3344 Culver Drive	San Diego	CA	92102	Facilities
<input checked="" type="checkbox"/>	Bouras	Talos	Mr.	854 Whitmere Drive	San Diego	CA	92101	Sales
<input checked="" type="checkbox"/>	Chowdery	Michael	Mr.	146 Meadow Lane	La Jolla	CA	92103	Purchasing
<input checked="" type="checkbox"/>	Navarro	Derek	Mr.	3300 Maple Drive	La Jolla	CA	92103	Operations
<input checked="" type="checkbox"/>	Romero	Nicole	Ms.	132 Lake Street	San Diego	CA	92101	Payroll
<input checked="" type="checkbox"/>	Wright	Mary	Ms.	1240 Potrero Avenue	San Diego	CA	92101	Sales

This is a sample of a data source document, which can be a table in a Word document, a spreadsheet in an Excel file, or a table in Access.

This is the main document, which contains the standard text and merge codes inserted where the variable text will be.

719 Coronado Drive
San Diego, California 92102

Today's Date

Mr. D'Andre Adams
3344 Culver Drive
San Diego, CA 92102

Dear D'Andre:

I want to take this opportunity to thank you for your continued dedication in the Facilities department. Some of you are new to us and some have been with us for many years. We hope that all of you have enjoyed your tenure with us thus far.

Enclosed is a copy of our revised Employee Policy Manual. Please read through it and if you have any questions or concerns, please contact your supervisor or Kenneth Hazell, Human Resources Director.

D'Andre, thank you again for your company loyalty.

Sincerely,

Ahn Tran
Office Manager

This is a sample of a finished merged document where the merge fields have been replaced with actual data from the data source document.

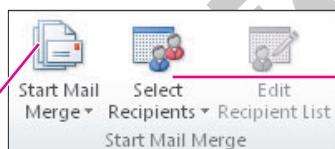
The Benefits of Using Mail Merge

Mail Merge will save you a lot of time and can help reduce errors in large mailings. For example, say you want to send a letter to 100 customers. Without using Mail Merge, you would be typing the same text in all 100 letters (or copying and pasting 100 times). However, using Mail Merge for the job, you create only one main document containing the standard text and one data source document containing the 100 customer names. You will also really appreciate Mail Merge when you later decide you want to make a change. Using Mail Merge, you can edit the main document once and remerge it with the data source to produce a new merged document. Without Mail Merge, you would need to edit each personalized letter individually.

The Mailings Tab

The Mailings tab on the Ribbon provides guidance in setting up both the main document and data source and helps you conduct the merge. The Start Mail Merge command group on the Mailings tab is the beginning point. Alternatively, you can choose Step by Step Mail Merge Wizard from the Start Mail Merge command to walk you through the process of choosing the main document, the data source document, inserting merge fields, and finally conducting the merge.

The Start Mail Merge command is where you specify the type of main document you want to use, such as letters, envelopes, or labels.



Select Recipients is where you either identify an existing data source list or create a new data source.



The Mail Merge Wizard will be familiar to those who have conducted merges in earlier versions of Word.

7.5 Working with the Data Source

Video Lesson

labyrinthelab.com/videos

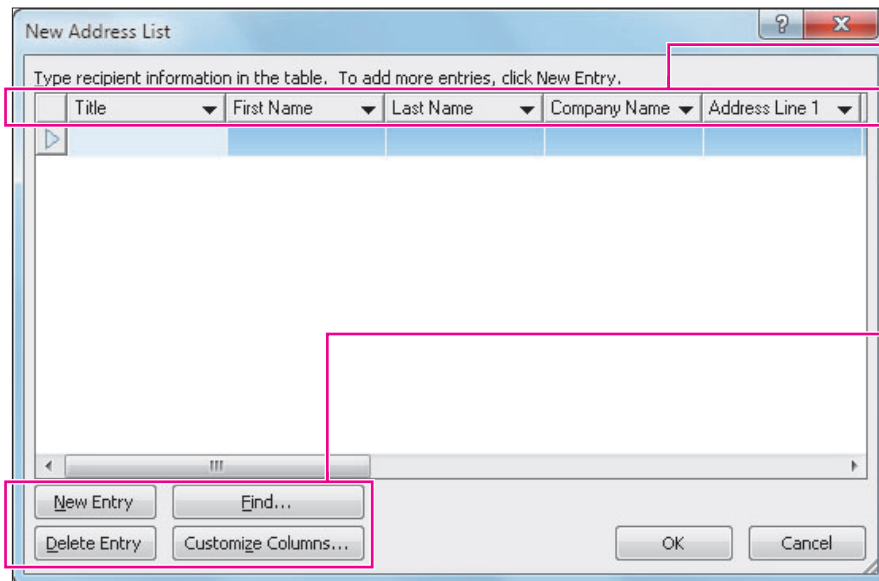
Data sources usually contain names, addresses, telephone numbers, and other contact information. However, you can include any information in a data source. For example, you may want to include inventory names, numbers, and prices of parts, if you are using Mail Merge to create a parts catalog. You can create a data source in Word, or you can use external data sources, such as an Access database or an Excel worksheet. Once a data source is created, it can be used as a source for many different main documents.

Designing Effective Data Sources

It is very important that you design effective data sources. The most important consideration is the number of fields to use. The more fields, the more flexibility you will have in the merge. An important rule to remember is that you cannot merge a portion of a field. For example, if a field contains both a first name and last name, then you will never be able to merge only the last name into a main document. This would be a problem if you needed to merge only a last name to create salutations such as Dear Ms. Alvarez. In this example, you would need to use one field for the first name and a separate field for the last name. You would also need to use a title field for the titles Mr., Ms., and Mrs.

Creating Address Lists

You can use the New Address List dialog box to set up address lists (data sources) for use in mail merges. This tool stores the addresses you enter in a table within a Microsoft Access database. This table, which becomes the data source for the merge, is linked to the mail merge main document. You can also use a Word table, an Excel worksheet, or an Access table as a data source for a mail merge. Each of these tools stores data in a table or worksheet structure.



The New Address List dialog box contains a set of predefined fields. When you're entering data, you use the **Tab** key to move forward to the next field. Use **Shift+Tab** to move backward to a previous field.

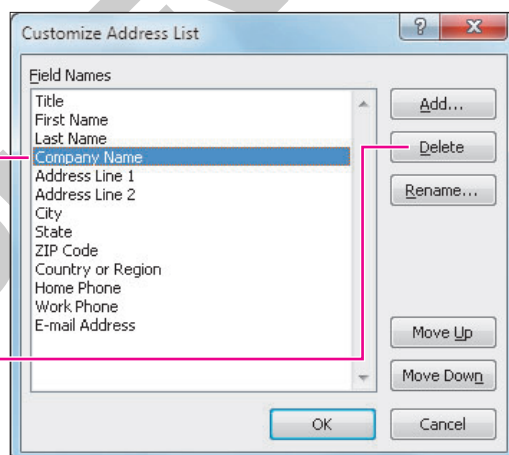
You can add a new entry, delete an entry, or find an existing entry. You can also customize the columns (fields) in the dialog box; you can add or remove fields, rearrange their order, or change their names.



The terms *fields* and *columns* are used interchangeably in this lesson. Each row of data is referred to as a *record*.

Customizing an Address List

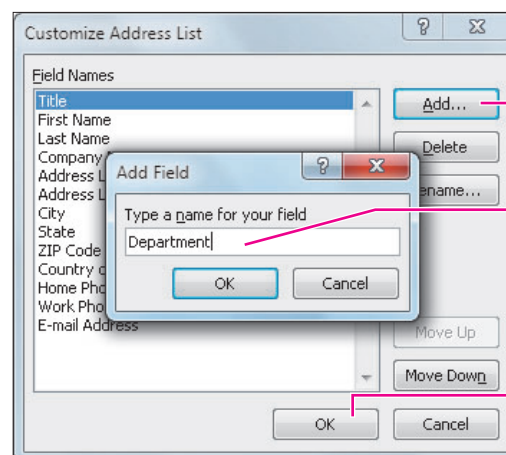
The Customize Address List dialog box makes it easy to set up the mailing list just as you want it. You can easily delete unnecessary fields and add your own custom fields to the list. You can also rename an existing field name and use the Move Up and Move Down buttons to reorder the list of fields.



Choose the field you want to delete.

Click the Delete button.

Delete a field from the list.



Click the Add button.

Type the new field name in the Add Field dialog box.


Click OK to add the new custom field.

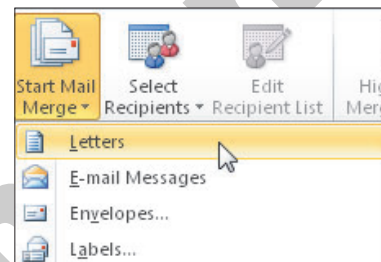
Add a field to the list.

DEVELOP YOUR SKILLS 7.5.1

Specify the Main Document and Create a Data Source

In this exercise, you will use the Start Mail Merge group on the Mailings tab to specify a letter as your main document, to customize the data source, and to enter data.

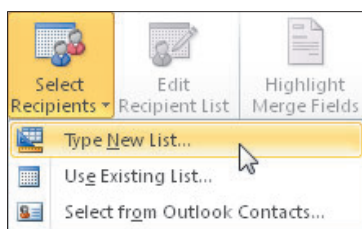
1. **Open** the Policy Manual Letter Main from the Lesson 07 folder.
2. Choose **Mailings**→**Start Mail Merge**→**Start Mail Merge**  from the Ribbon.
3. Choose **Letters** from the menu, as shown at right.
You are indicating here that the open document on the screen will be the main document.



Connect to the Data Source

Next you will indicate which data source will be connected to the letter. Since you don't have an existing data source, you will create one during the mail merge process.

4. Choose **Mailings**→**Start Mail Merge**→**Select Recipients**  from the Ribbon.
5. Choose **Type New List** from the menu.



The New Address List dialog box opens.

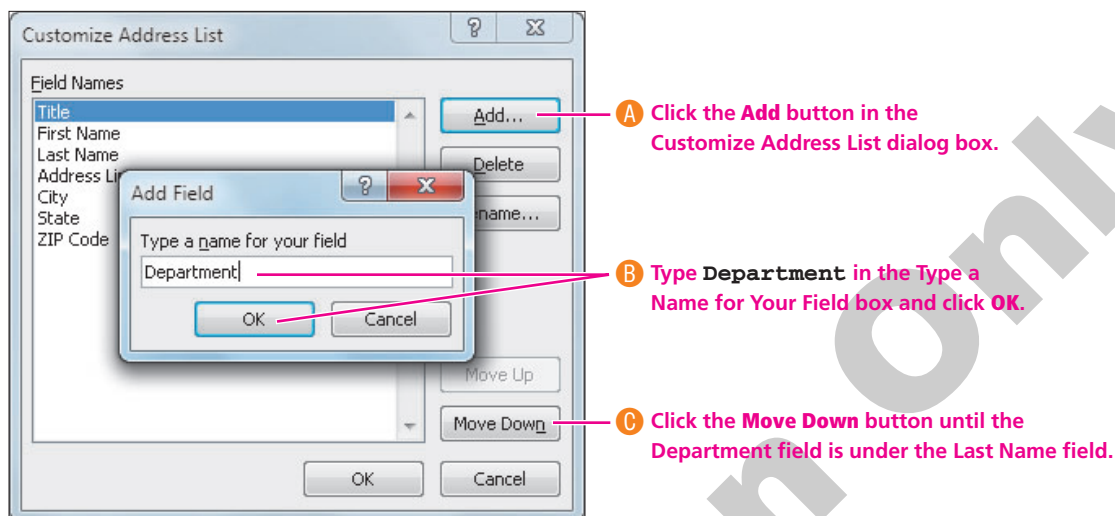
Remove Fields

You will remove unnecessary fields from the set of predefined fields.

6. Click the **Customize Columns** button in the bottom-left corner of the dialog box to display the Customize Address List dialog box.
7. Choose the **Company Name** field.
8. Click the **Delete** button, and then click **Yes** when the message appears to verify the deletion.
9. **Delete** the Address Line 2, Country or Region, Home Phone, Work Phone, and E-mail Address fields; then, click on the **Title** field name at the top of the list.

Add a Field

10. Follow these steps to add a Department field to the list:

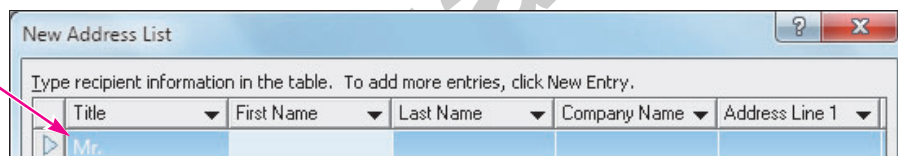


11. Click **OK** to complete the changes.

Enter the First Record

The cursor should be in the Title field.

12. Type **Mr.**, and then tap **Tab** to move to the next field.



TIP

Do not type spaces after entering information in fields. Word will take care of adding the necessary spaces in the inside address and the salutation. You can always click in a field and make editing changes if necessary.

13. Type **Talos**, and then tap **Tab** to move to the next field.

14. Type **Bouras**, and then tap **Tab** to move to the next field.

15. Finish **entering** the Talos Bouras data shown in the following table, **tabbing** between fields. The list of fields will scroll as you continue to **Tab** and type.

16. When you complete the first record, click the **New Entry** button or tap **Tab** to generate a new blank row for the next record, and then **enter** the two remaining records shown in this table.

Mr. Talos Bouras Sales 854 Whitmore Drive San Diego, CA 92101	Ms. Nicole Romero Payroll 132 Lake Street San Diego, CA 92101	Mr. Michael Chowdery Purchasing 900 C Street La Jolla, CA 92103
--	--	--



TIP

If you accidentally tap **Tab** after the last record and add a blank record, just click the **Delete Entry** button.

17. Leave the **New Address List** dialog box **open**.

Reviewing Your Records

Video Lesson labyrinthelab.com/videos

It's a good idea to review your records for accuracy before saving the data source. However, if you miss an error, you can always edit it in the Edit Data Source dialog box, which you'll learn about later in this lesson.

If an entry is wider than the default field width, you can click the insertion point directly in the field and use the arrow keys to move through the entry.

	First Name	Last Name	Department	Address Line 1	City
▶	Mr.	Talos	Bouras	Sales	854 Whitmore Drive San Diego
	Ms.	Nicole	Romero	Payroll	132 Lake Street San Diego
	Mr.	Michael	Chowdery	Purchasing	900 C Street La Jolla

Buttons: New Entry, Find..., Delete Entry, Customize Columns..., OK, Cancel

Alternatively, you can position the mouse pointer on the border between two columns, and when the mouse pointer looks like a double-headed black arrow, press and hold the mouse button and drag to the right to widen the column.

You can use the scroll bar to move back and forth in the dialog box.

DEVELOP YOUR SKILLS 7.5.2

Review and Save Your Work

In this exercise, you will take a moment to examine your records for accuracy, and then you will save your data source.

1. Position the **mouse pointer** on the scroll bar and drag left and right to view all the fields.
2. Click the **insertion point** in the Address Line 1 field for the first record, and use the **arrow keys** on the keyboard to move the insertion point through the entry.
3. Position the **mouse pointer** on the border between the Address Line 1 and City fields, and when the mouse pointer changes to a double-headed black arrow, **drag** to the **right** to display the entire *854 Whitmore Drive* entry.

	First Name	Last Name	Department	Address Line 1	City
▶	Mr.	Talos	Bouras	Sales	854 Whitmore Drive

4. Make any needed revisions.
5. When you finish reviewing your records, click **OK** to open the Save Address List dialog box.

6. **Save** the data source file as **Policy Manual Letter Data** in the Lesson 07 folder.
Your data source is now connected to the main document.
7. Leave the current document **open**, and stay in the Mailings tab on the Ribbon for the next exercise.

Managing the Address List

Video Lesson

labyrinthlab.com/videos

The Mail Merge Recipients dialog box lets you sort and filter address lists and choose records to include in a mail merge. To edit data, you click the Edit button in the Mail Merge Recipients dialog box to display the Edit Data Source dialog box, where you can add, delete, and edit entries.

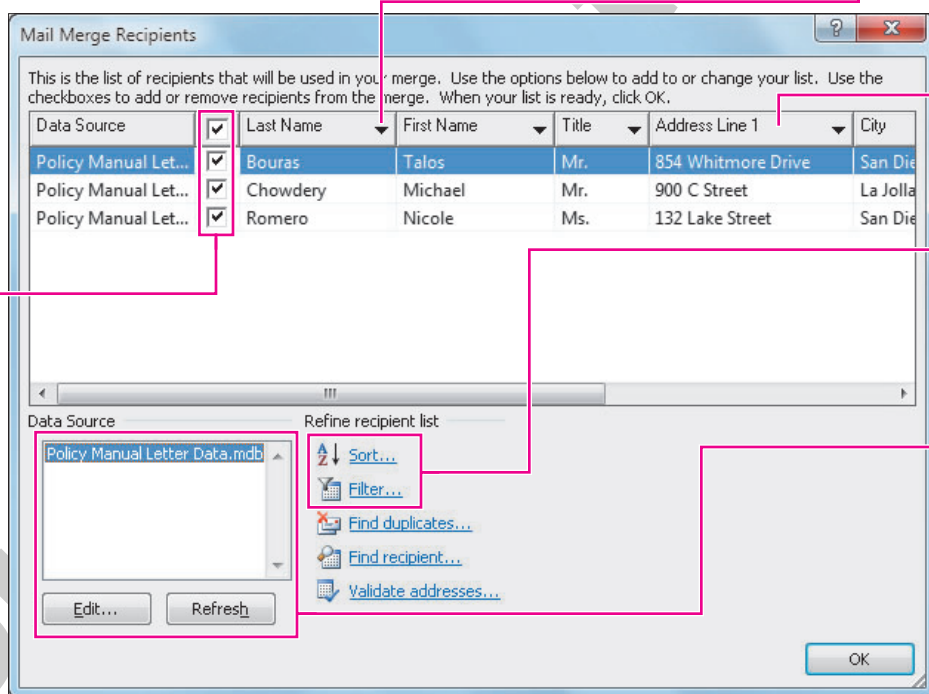


If you used a Word table, Excel spreadsheet, or other document for your data source, you can edit directly in that data source document if you wish. Since the data source is connected to the main document, any changes made are updated automatically in the main document.

You choose→Mailings→Start Mail Merge→Edit Recipient List  from the Ribbon to access the Mail Merge Recipients dialog box.

If there are records that you do not want to include in your mailing, use the menu ▼ buttons to display a filter list allowing you to temporarily hide records based on filter criteria.

Only records that are checked are used in the mail merge. Individual records can be checked or unchecked by clicking their checkboxes. All records can be checked or unchecked at once using the checkbox at the top of the column.



You can sort the list based on any field by clicking the desired field heading.

The Sort and Filter links display dialog boxes where you can further refine, sort, and filter criteria.

The Edit button displays the Edit Data Source dialog box, allowing you to enter new records and edit existing ones. You must click the name of the data source for the Edit button to be available.

The Edit Data Source dialog box looks and operates like the New Address List dialog box that you used to enter the original list.

DEVELOP YOUR SKILLS 7.5.3

Use Mail Merge Recipient Options and Edit Records

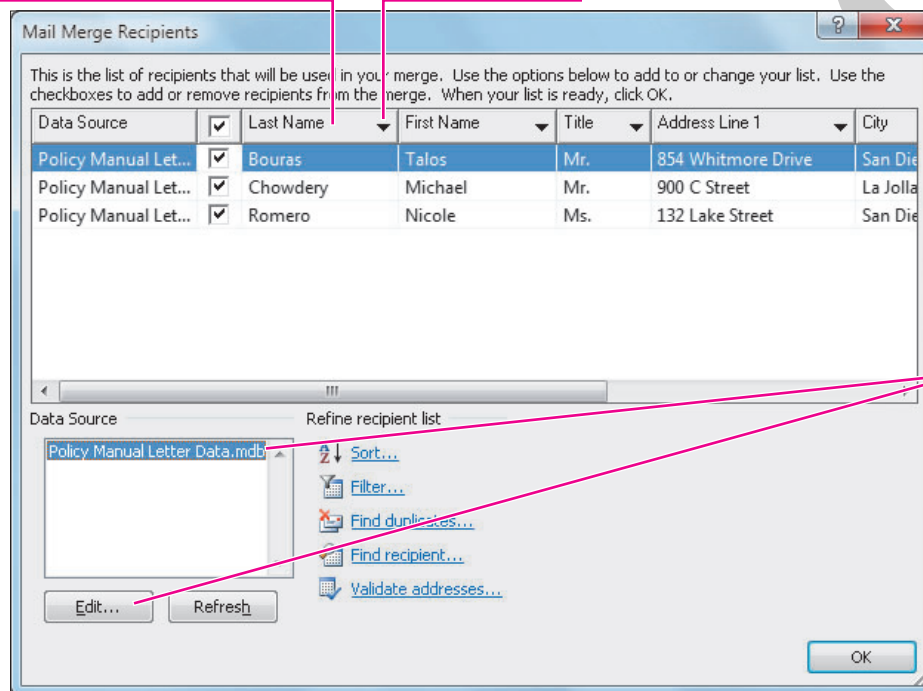
In this exercise, you will work with the Mail Merge Recipients dialog box, where you can sort, filter, and edit your mailing list.

1. Choose **Mailings**→**Start Mail Merge**→**Edit Recipient List**  from the Ribbon.

2. Follow these steps to sort and filter the list and open the Edit Data Source dialog box:

A Click the **Last Name** field heading to temporarily sort the list in ascending order by last name. Each time you click a field heading, the list toggles between ascending and descending order.

B Click the **Last Name menu** ▼ button and notice the filtering options. Choose **Chowdery** from the menu to filter out all other entries. Click the **Last Name menu** ▼ button again, and choose **(All)** to redisplay all records.



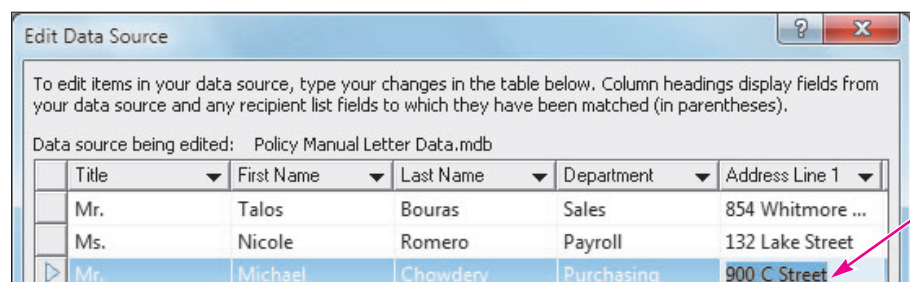
C Choose the **Data Source** to highlight it, and then click the **Edit** button to display the Edit Data Source dialog box.

Edit a Record

Remember, the Edit Data Source dialog box looks and operates like the New Address List dialog box.

3. Click the **900 C Street** to highlight the text.

4. Type **146 Meadow Lane** in its place.



Add Recipients

5. Follow these guidelines to enter the three records at right:

- Use the **New Entry** button or **tap** **Tab** for each new record.

Ms. Mary Wright Sales 1240 Potrero Avenue San Diego, CA 92101	Mr. Derek Navarro Operations 3300 Maple Drive La Jolla, CA 92103	Mr. D'Andre Adams 3344 Culver Drive San Diego, CA 92102
--	---	---

- **Tap** **Tab** to move from one field to the next.

- Notice that the third record does not include a department name. **Tap** **Tab** to pass through the department field and leave it empty.

- Make sure to **enter** the data in the correct fields.

6. Click **OK** to close the dialog box.

7. Click **Yes** when the message appears verifying your update, and then notice your changes in the Mail Merge Recipients dialog box.

Notice that Word remembers that you wanted the list sorted in alphabetical order by last name.

8. Click **OK** to close the Mail Merge Recipients dialog box.

You will create the main document in the next exercise.

7.6 Working with Main Documents

Video Lesson

labyrinthlab.com/videos

You accomplish a merge by combining a main document with a data source. Typical main documents include form letters, envelopes, and mailing labels. A main document is linked to a data source that includes one or more merge fields. Merge fields inserted into a main document correspond to fields in the attached data source. Some merge fields, such as the address block, are composite fields consisting of a number of fields grouped together. For example, Title, First Name, Last Name, Address, City, State, and Zip would be included in the address block merge field.

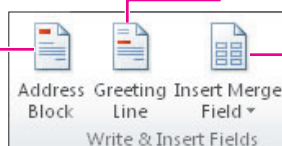


Though not a necessity, including the word “main” in the document’s name can be helpful in the future.

When you conduct a merge, a customized letter, envelope, or label is created for each record in the data source. After the merge is complete, you can save or print the merged document. The following figure shows the command buttons in the Write & Insert Fields group of the Mailings tab that you will use to insert merge fields into your letter.

This command allows you to insert an address block for an inside address in your letter.

This command lets you insert a greeting line.



Use this button to insert any of the fields from your data source.

The following illustration shows the form letter with the location of the merge fields you will insert.

719 Coronado Drive
San Diego, California 92102

Today's Date

«AddressBlock»

«GreetingLine»

I want to take this opportunity to thank you for your continued dedication in the «Department» department. Some of you are new to us and some have been with us for many years. We hope that all of you have enjoyed your tenure with us thus far.

Enclosed is a copy of our revised Employee Policy Manual. Please read through it and if you have any questions or concerns, please contact your supervisor or Kenneth Hazell, Human Resources Director.

Thank you again for your company loyalty «First_Name».

Sincerely,

Ahn Tran
Office Manager

XX

When you execute the merge, the main document and data source are merged; the address block, greeting line, and merge fields are replaced with data from the data source.

Setting Up Main Documents

You can use any document as a mail merge main document. A document becomes a main document when you attach it to a data source and insert merge fields. In this lesson, you create a main document from the Policy Manual Letter Main document that is already open on your screen. Once a data source is attached, you can insert merge fields.


DEVELOP YOUR SKILLS 7.6.1

Set Up a Form Letter

In this exercise, you will set up a form letter. The Policy Manual Letter Main document should still be open.

1. If necessary, choose **Home**→**Paragraph**→**Show/Hide** ¶ from the Ribbon to display formatting characters.

Insert the Date

2. Using the left margin area, select the **Today's Date** line, and then tap **Delete**.
3. Choose **Insert**→**Text**→**Insert Date and Time**  from the Ribbon to display the Date and Time dialog box.

4. Choose the **third date** format on the list, check the **Update Automatically** checkbox in the bottom-right corner of the dialog box, and then click **OK**.

Checking this option instructs Word to insert the current date when the letter file is opened on a later date. The date in your letter will always be the current date, which is a convenient option for form letters that you want to use again.

5. Tap **[Enter]** four times after inserting the date.

Insert the Address Block

6. Choose **Mailings**→**Write & Insert Fields**→**Address Block**  from the Ribbon.

The Insert Address Block dialog box appears, allowing you to choose a format for the address block.

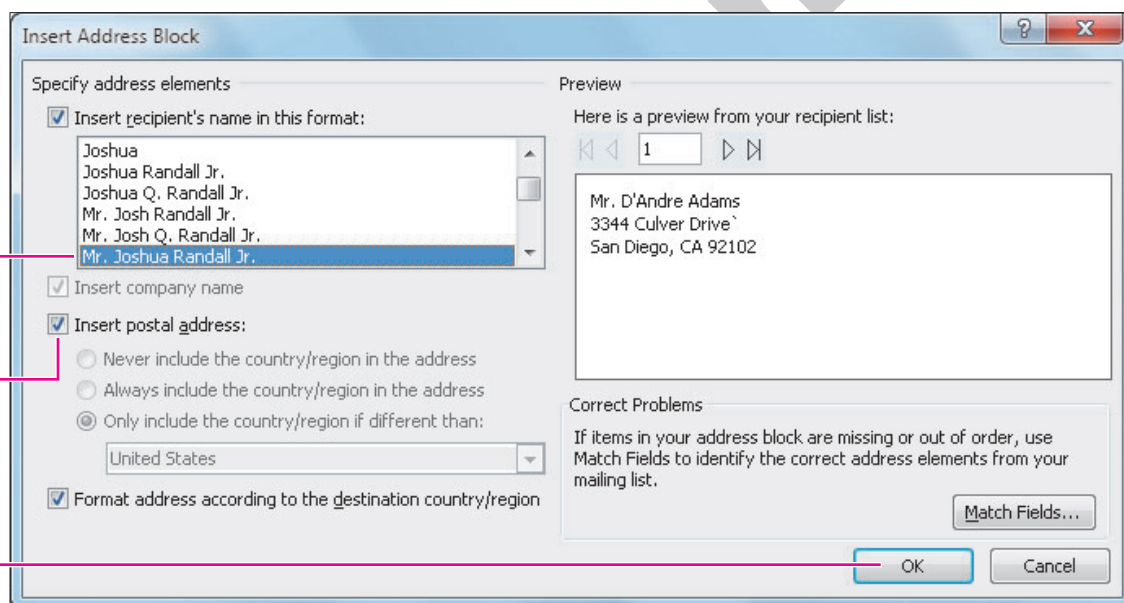
Notice that the Preview window is displaying the address block format of the option that is highlighted at the left side of the dialog box.

7. Follow these steps to insert an Address Block merge code:

A Click on the different formats for the recipient's name, viewing the changes in the Preview box, and then choose **Mr. Joshua Randall Jr.**

B Preview the results of removing the checkmark from the Insert Postal Address checkbox, and then click it again to reinsert the merge code into the document.


C Click **OK** to accept the Address Block options.



An Address Block merge code appears in the document. During the merge, Word inserts address information from the data source at the location in the customized letters.

8. Tap **[Enter]** twice.

Insert the Greeting Line

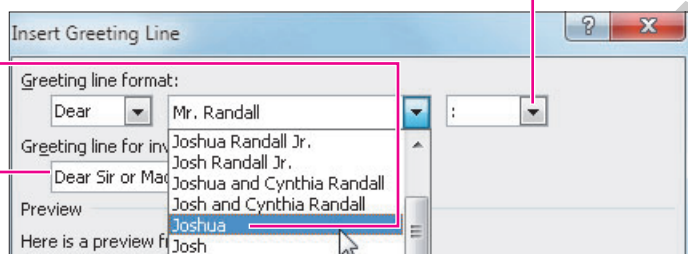
9. Choose **Mailings**→**Write & Insert Fields**→**Greeting Line**  from the Ribbon.
10. Follow these steps to modify and insert the greeting line:

A Click the **drop-down arrow** and change this option to a colon (:).

B Click the **drop-down arrow** and choose **Joshua** from the list.

C Notice that this style greeting will be used for the records in the data source if they are missing last names.

D Click **OK** to insert the greeting line code, and then tap **[Enter]** twice.



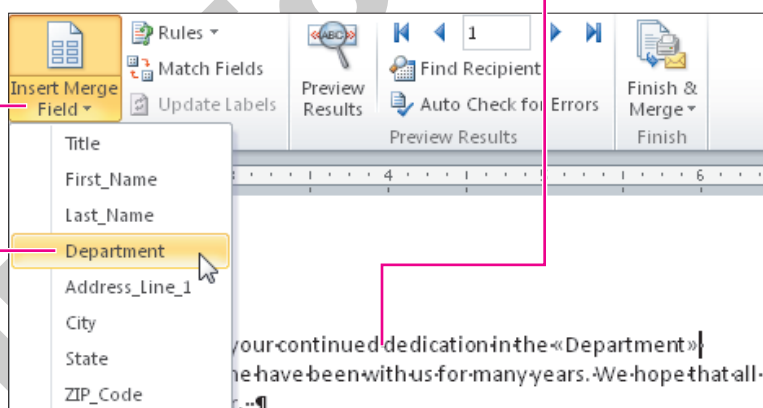
Insert Another Merge Field


11. Follow these steps to insert the Department merge field code into the letter:

A Position the **insertion point** at the end of the word *the* in the first line and tap **[Spacebar]**.

B Choose **Mailings**→**Write & Insert Fields**→**Insert Merge Field** menu button from the Ribbon to display a list of merge fields in the Data Source document.

C Choose **Department** from the merge field list.





12. Position the **insertion point** at the end of the line beginning with *Thank you again*.
13. Choose the **Mailings**→**Write & Insert Fields**→ **Insert Merge Field** menu button from the Ribbon.
14. Choose the **First_Name** field from the drop-down merge field list.

```

«AddressBlock»
«GreetingLine»
I want to take this opportunity to thank you for your continued dedication in the « Department »
department. Some of you are new to us and some have been with us for many years. We hope that all
of you have enjoyed your tenure with us thus far.
Enclosed is a copy of our revised Employee Policy Manual. Please read through it and if you have any
questions or concerns, please contact your supervisor or Kenneth Hazell, Human Resources Director.
Thank you again for your company loyalty «First_Name».
Sincerely,
Ahn Tran
Office Manager
  
```


Review the Letter for Accuracy

15. Choose **Home**→**Paragraph**→**Show/Hide**  from the Ribbon to turn off the formatting marks.
16. Take a few moments to review your letter, making sure the merge fields match the preceding example. In particular, make sure you used the proper punctuation and spacing between fields and the text. Any punctuation or spacing errors that occur in your main document will appear in every merged letter.
17. **Save**  the letter in the Lesson 07 folder.

7.7 Conducting a Merge

Video Lesson

labyrinthelab.com/videos

Merging combines a main document with a data source to produce a merged document. If you are merging a form letter with a data source, Word produces a personalized copy of the form letter for each record in the data source. You can print one or all of the records and save the merged document if you wish. It's always a good idea to preview what the document will look like when it is merged so you can make corrections to the main document, if needed.

Previewing the Results

The Preview Results group on the Mailings tab allows you to see how your letters will look before you complete the merge. If you notice an error that needs to be fixed in the main document, simply click the Preview Results button again to return to it.

Using Auto Check for Errors

When you have many records to preview, rather than previewing each one individually, you can use Auto Check for Errors. The feature goes through the document checking for common errors such as an invalid field code. In the Auto Check for Errors dialog box, you have three options for viewing errors:

- Simulate the merge and report errors in a new document
- Complete the merge, pausing to report each error as it occurs
- Complete the merge without pausing; errors are reported in a new document

These arrows move back and forth through the list, one record at a time.

You can click the Preview Results button to display the first record from your data source in the letter.

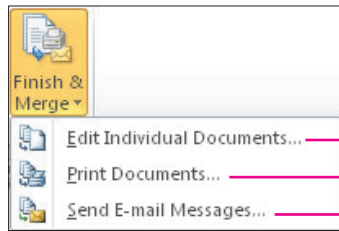


The navigate button lets you browse through the merge letters. There is one letter for each record in the data source. The far left and right arrows take you to the first and last records in the list.

You click the Auto Check for Errors button to open a dialog box from which you choose how to view errors.

Finishing the Merge

When you feel confident that your letter and data source are accurate, you use the Finish & Merge command.



This option merges the letters on the screen, which allows you to edit individual letters if you wish. For example, you may want to add a P.S. to some of your letters.

This option merges directly to the printer.

You can also merge to email messages.




To Save or Not to Save

Merged documents are rarely saved, because they can easily be reconstructed by merging the main document with the data source. A merged document is usually previewed, printed, and closed without saving. However, you can certainly save the merged document if you wish to save a record of it. If a merged document contains errors, you can close it without saving, edit the main document or data source, and then conduct the merge again.

DEVELOP YOUR SKILLS 7.7.1

Conduct the Merge

In this exercise, you will use the Preview Results group on the Mailings tab to review your letters before you perform the merge. Then you will complete the merge on the screen.

1. Choose **Mailings**→**Preview Results**→**Preview Results**  from the Ribbon to view the data from the first record.
2. Use the **navigation buttons** in the Preview Results group to scroll through all your merged documents. 
3. Choose **Mailings**→**Finish**→**Finish & Merge**  from the Ribbon.
4. Choose **Edit Individual Documents** from the menu to merge the letters on the screen.
5. Click **OK** to merge all records.
6. **Scroll** through the letters and scan their contents.
Notice that there is one letter for each record in the data source.
7. **Close** the merged document without saving.
8. Choose **Mailings**→**Preview Results**→**Preview Results** again to display the main document instead of the preview.
9. Leave the main document **open** for the next exercise.

7.8 Working with Merge Problems

Video Lesson

labyrinthelab.com/videos

Several common errors can cause a merge to produce incorrect results. The merged document (or preview) will usually provide clues as to why a merge fails to produce the intended results. Once you identify an error in the merged document, such as leaving out a comma or space before or after a merge field, you can make changes to the main document or the data source. You can then conduct the merge again to determine if the error was fixed. Repeat this process until the merge works as intended.

Common Merge Problems

Several problems are common in merges. These problems and their solutions are described in the following Quick Reference table.



QUICK REFERENCE	DEALING WITH COMMON MERGE PROBLEMS
Problem	Solution
The exact same error appears in every merge letter.	The problem is in the main document, since it occurs in every merge letter. Correct the error in the main document and perform the merge again.
Some letters in the merged document are missing data.	This occurs because some records in the data source are missing data. Add data to the necessary fields in the data source, or modify the main document or merged letters to account for the missing data.
Some letters in the merged document have incorrect data.	The problem is in the data source, since it does not affect every letter in the merged document. Correct the data errors in the data source and perform the merge again.

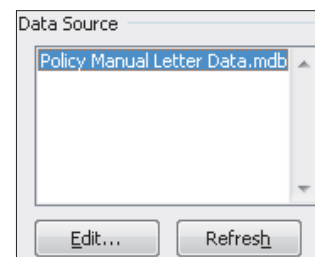
DEVELOP YOUR SKILLS 7.8.1

Fix Merge Problems

In this exercise, you will examine your document for merge problems. Refer to the previous table if you need help solving them. The following steps are a guide to assist you. They do not address all the possible problems that you may encounter; they do, however, address one specific error that was made intentionally. You will insert a comma after the First Name field.

1. Position the **insertion point** after the <<First Name>> merge field, and then **type** a comma.
2. Conduct the **Finish & Merge** process again to review and fix problems in the merged document.
3. Browse through the entire document, from beginning to end, and look for any errors. Note errors in a separate Word document or on a piece of paper. Indicate how often the errors occur (in every merged letter or just one).
4. If you find an error that occurs in *every merged letter*, such as the one you corrected with the missing comma, **close** the merged document without saving and **edit** the main document, and then **save** it.


5. If you find a data error in *just one letter*, such as the missing *Facilities* department name for Mr. Adams, close the merged document without saving it.
 - Choose **Mailings**→**Start Mail Merge**→**Edit Recipient List**  from the Ribbon.
 - When the Mail Merge Recipients dialog box appears, highlight the **Data Source** in the bottom-left corner of the dialog box, and click the **Edit** button.
 - After you fix any errors, click **OK**, and then click **Yes** when the message appears asking if you want to update the data.
 - Click **OK** to close the Mail Merge Recipients dialog box.
6. When you have corrected any errors, execute the **merge** again.
7. **Close** the merged document without saving it.
8. **Save**  and **close** Policy Manual Letter Main.



7.9 Using Envelopes and Labels with Mail Merge

Video Lesson

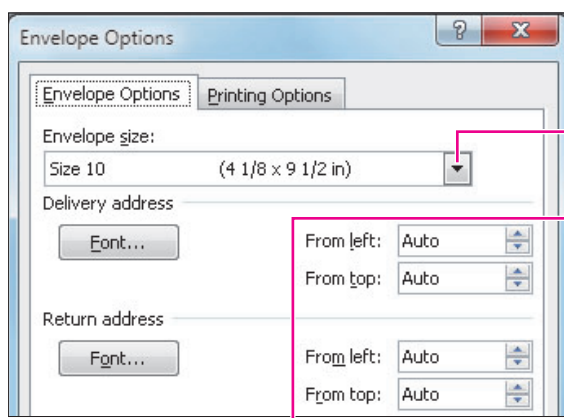
labyrinthlab.com/videos

When you choose Mailings→Start Mail Merge→Start Mail Merge  from the Ribbon, Word presents you with options for the type of main document you want to create. In addition to form letters, you can use envelopes, labels, and other types of documents as main documents. The merged document's title bar reflects the type of merge performed. For example, when you conduct the merge for envelopes the first time, the name of the merged document is Envelopes1; you may change the name and save it if you wish.

You can use the same data source for various main documents. For example, you can use the same data source for envelopes and mailing labels that you used for the form letter.

Generating Envelopes with Mail Merge

You can use Mail Merge to generate an envelope for each record in a data source. Mail Merge lets you choose the envelope size and formats. The standard business (Size 10) envelope is the default. You will check your printer to see how to place the envelopes in it for printing. For example, you may need to know which side should be facing up and which way the flap is facing.



You can choose various envelope sizes from this drop-down list.

These features allow you to choose the font and position for the Delivery Address and the Return Address.



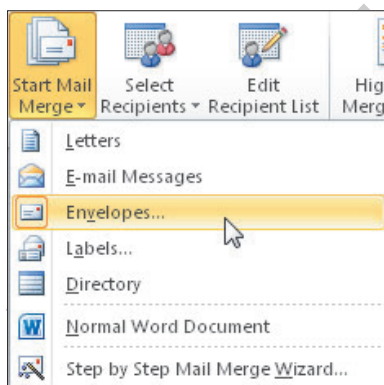
If you are using envelopes with the company name and address preprinted, then you will not use any Return Address options here.

DEVELOP YOUR SKILLS 7.9.1

Choose an Envelope Size and Attach a Data Source

In this exercise, you will choose an envelope as the main document and connect the Policy Manual Letter Data file to the envelope.

1. Start a **new** blank document.
2. Choose **Mailings**→**Start Mail Merge**→**Start Mail Merge**  from the Ribbon, and then choose **Envelopes** from the menu.




3. When the Envelope Options dialog box appears, if necessary, choose **Size 10** from the Envelope Size list.

This is the standard envelope size for business correspondence.

4. Click **OK** to apply the settings to the document.

The envelope main document appears in the Word window although right now, it doesn't look any different. You will set up the envelope main document in a moment, and you will see the envelope layout on the screen.

Connect the Data Source

5. Choose **Mailings**→**Start Mail Merge**→**Select Recipients**  from the Ribbon, and then choose **Use Existing List** from the menu.
6. When the Select Data Source dialog box appears, navigate to your file storage location and **open** Policy Manual Letter Data from the Lesson 07 folder.
7. Stay in the **Mailings** tab for the next topic.

Arranging the Envelope

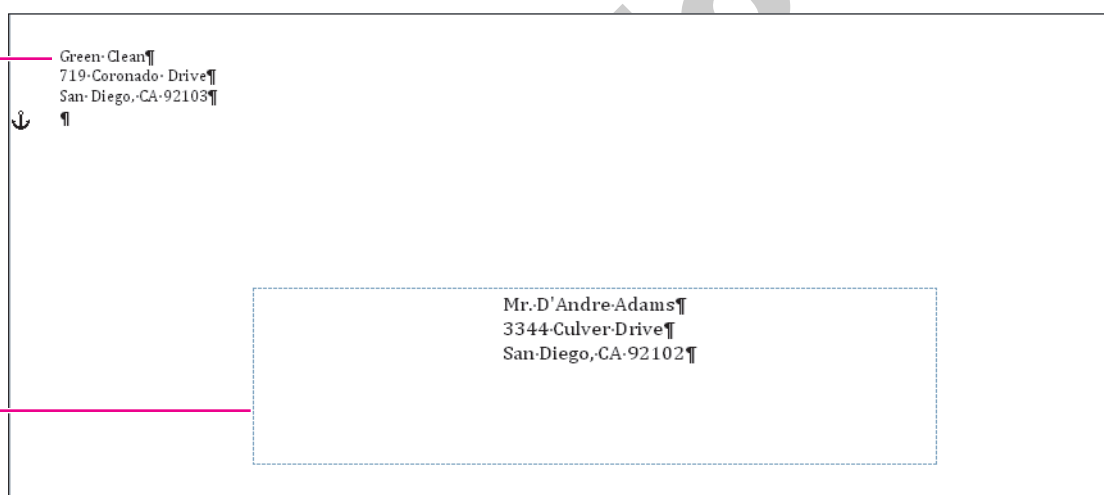
Video Lesson

labyrinthlab.com/videos

You can insert an address block in the envelope main document. An envelope main document can be saved like any other main document, allowing you to use it over and over to generate envelopes from a data source. The following illustration shows the envelope main document that you will set up in the next exercise.

The return address is typed in the top-left corner of the envelope main document. Remember, if you have preprinted business envelopes, skip this step.

The envelope has a rectangular placeholder for the address block. You must click the placeholder before inserting the address block.



DEVELOP YOUR SKILLS 7.9.2

Merge to Envelopes

In this exercise, you will position the return address and the address block on the envelope, and then you will merge the envelope main document with the data source.

Set Up the Envelope

1. If necessary, turn on the **formatting marks**, and then **type** the return address, starting at the first paragraph symbol in the upper-left corner of the envelope, as shown here.
2. Position the **insertion point** next to the paragraph symbol toward the center bottom half of the envelope to display the address block placeholder.

Green·Clean¶
719·Coronado·Drive¶
San·Diego,·CA·92103¶
¶

3. Choose **Mailings**→**Write & Insert Fields**→**Address Block**  from the Ribbon.

4. Click **OK** to accept the default address block settings.

This is the same Insert Address Block dialog box you used to insert the address block in the form letter. An Address Block field is inserted in the placeholder box. Word will merge the address information from the data source into this location when the merge is conducted.

Preview the Merge

5. Choose **Mailings**→**Preview Results**→**Preview Results**  from the Ribbon to display the first record from the data source in the envelope.

6. Use the **navigation buttons** in the Preview Results group to scroll through all your merged envelopes.



7. Choose **Mailings**→**Finish**→**Finish & Merge**  from the Ribbon.

8. Choose **Edit Individual Documents** from the menu, and then click **OK** to merge all the records.

9. Turn **off** the formatting marks from the Ribbon.

10. **Scroll** through the envelopes, and notice that there is one envelope for each record in the data source.

You could use the envelopes for mailing the letters created in the previous exercises, because they are generated from the same data source.

11. If necessary, fix any problems with the mail merge.

12. When you finish, **save**  the merged document as **Policy Manual Envelopes** in the Lesson 07 folder, and then **close** it.

13. Turn **off** the Preview Results button, and then **save** the envelope in the Lesson 07 folder as **Policy Manual Envelope Main** and **close** it.

Generating Labels with Mail Merge

Video Lesson

labyrinthlab.com/videos

You can use Mail Merge to generate mailing labels for each record in a data source. Mail Merge lets you choose the label format, sheet size, and other specifications. It also lets you insert an address block and other fields in the main document. Like other main documents, a labels main document, as well as the merged document, can be saved for future use. The following illustration shows a portion of the labels main document that you will set up in the next exercise.

«AddressBlock»	«Next Record»«AddressBlock»	«Next Record»«AddressBlock»
«Next Record»«AddressBlock»	«Next Record»«AddressBlock»	«Next Record»«AddressBlock»
«Next Record»«AddressBlock»	«Next Record»«AddressBlock»	«Next Record»«AddressBlock»

Using Label Options

The Label Options dialog box allows you to choose printer options and the type of label you will use for your merge. You will find a number on the package of labels you purchase that may correspond to the Product Number in the Label Options dialog box. If you buy a brand name not included in the Label Vendors list, you can match your label size with the label size in the Label Information section.

Choose the appropriate printer information in this area.

Choose the product brand from this drop-down list.



Choose the type of label from this list. If you're not sure what your label type is, you'll find it printed on the box the labels come in.

This area shows label type and the relevant measurements.

DEVELOP YOUR SKILLS 7.9.3

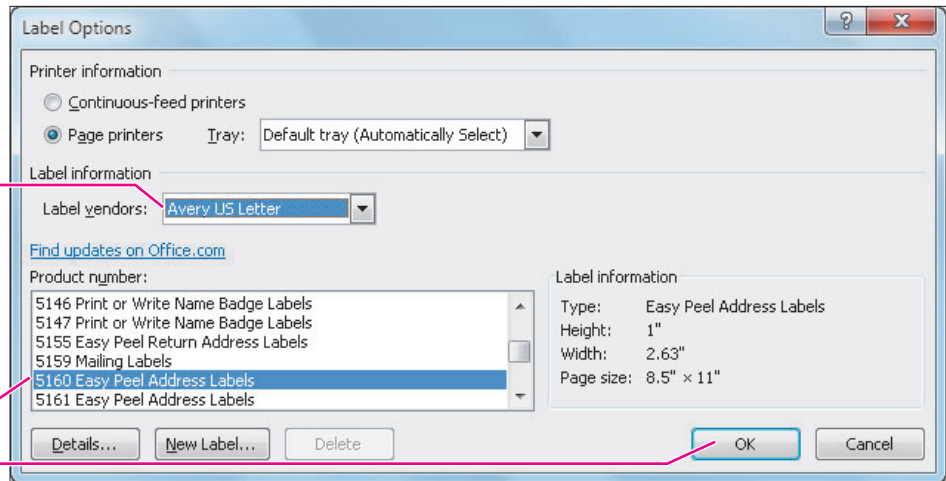
Use Mail Merge to Generate Mailing Labels

In this exercise, you will set up a labels main document, and then you will merge the labels main document with the data source used in the previous exercises.

1. Start a **new** blank document.
2. If necessary, choose **Home**→**Paragraph**→**Show/Hide**  from the Ribbon to display formatting marks.
3. Choose **Mailings**→**Start Mail Merge**→**Start Mail Merge**  from the Ribbon, and then choose **Labels** from the menu.

4. Follow these steps to choose a label:





- A Scroll through the options and choose **Avery US Letter** from the **Label Vendors** drop-down list.
- B Scroll through the list options and then choose **5160 Easy Peel Address Labels** from the **Product Number** list.
- C Click **OK**.





The labels main document appears in the Word window.

Labels are contained in a Word table, but don't worry. You don't have to be a table expert to create labels. By default, table grid lines don't appear when you create labels.

Connect the Data Source

5. Choose **Mailings**→**Start Mail Merge**→**Select Recipients**  from the Ribbon, and then choose **Use Existing List** from the menu.
6. When the Select Data Source dialog box opens, navigate to your file storage location and **open** Policy Manual Letter Data. Make sure the insertion point is in the first address label position.
Notice that the space for the first label is blank and all the rest have a <<Next Record>> code in them. You will add the Address Block merge fields with the next few steps.
7. Choose **Mailings**→**Write & Insert Fields**→**Address Block**  from the Ribbon.
8. Click **OK** to insert the address block code in the first label.
9. Choose **Mailings**→**Write & Insert Fields**→**Update Labels**  from the Ribbon to place the address block in all of the labels.
Your addresses will fit the labels better if you remove Word's additional spacing.
10. Press **[Ctrl] + [A]** to select the entire document.
11. Choose **Home**→**Styles** from the Ribbon.
12. Choose the **No Spacing** style from the Quick Styles gallery.
13. Choose **Mailings**→**Preview Results**→**Preview Results**  from the Ribbon to see how the labels will look when you print them, and then turn off the Preview Results command.

Conduct the Merge

14. Choose **Mailings**→**Finish**→**Finish & Merge**  from the Ribbon.
15. Choose **Edit Individual Documents** from the menu.
16. When the Merge to New Document dialog box appears, click **OK** to merge all the records.
17. **Close** your merged document without saving it.
18. **Save**  the labels main document in the Lesson 07 folder as **Merge Labels**, and then **close** it.

7.10 Concepts Review

Concepts Review

labyrinthelab.com/word10

To check your knowledge of the key concepts introduced in this lesson, complete the Concepts Review quiz by going to the URL listed above. If your classroom is using Labyrinth eLab, you may complete the Concepts Review quiz from within your eLab course.




Reinforce Your Skills

REINFORCE YOUR SKILLS 7.1


Apply Quick Styles to a Document

In this exercise, you will apply Quick Styles to a document. Then you will copy a style using the Format Painter, and finally you will change the Theme color to alter the look of the style.


Change the Quick Styles Style Set

1. **Open** rs-Instructor Profiles from the Lesson 07 folder.
2. **Select** in the heading at the top of the document.
3. Choose **Home**→**Styles**→**Change Styles**  from the Ribbon.
4. Choose **Fancy** from the Style Set submenu.

Apply a Style



5. Click the **More**  button on the Quick Styles gallery to display the entire gallery.
6. Choose the **Title** style to format the document heading.
7. Position the **insertion point** in the heading *Tanya Walton* below the main heading.
8. Choose **Heading 2** from the Quick Styles gallery. Keep the insertion point in the heading *Tanya Walton*.

Copy the Quick Style

9. Choose **Home**→**Clipboard** from the Ribbon.
10. Use the **Format Painter**  to copy the Heading 2 style to the other instructor headings.
Remember, double-clicking the Format Painter keeps the feature turned on until you turn it off.
11. Turn off the Format Painter.

Change the Theme Color

You may recall that the look of Quick Styles is based on the current document theme.

12. Choose **Page Layout**→**Themes**→**Theme Colors**  from the Ribbon.
13. Choose **Urban** from the list.
14. **Save**  the file, and **close** it.




REINFORCE YOUR SKILLS 7.2

Create, Modify, and Delete a Character Style



In this exercise, you will create a character Quick Style. You will create the style by formatting text with the formats you want in your style. Then you will modify your new style, and finally you will delete it.

1. **Open** rs-Recycle Computers from the Lesson 07 folder.
2. **Select** Wellsville Donation Center in the table *Where To Take Your Computer Equipment*.

Format the Text

3. Choose **Home**→**Font**→**Font Color**  menu ▼ from the Ribbon.
4. Choose the color in **column 6, row 5**: Red, Accent 2, Darker 25%.
5. Choose **Home**→**Font**→**Bold**  from the Ribbon.
6. Choose **Home**→**Font**→**Font Size**  menu ▼ from the Ribbon, and choose **16 pt**.

Create the Style

7. Keep the text selected, and if necessary, click the **dialog box launcher**  in the bottom-right corner of the Styles group on the Home tab.
This opens the Styles task pane.
8. Click the **New Style**  button in the bottom-left corner of the Styles task pane.
Notice that the Formatting area of the dialog box has taken on the formatting from the selected text in the document, so the only thing remaining is to give the style a name.
9. Type **My Character Style** in the Name area at the top of the dialog box.
10. Choose **Character** from the Style Type drop-down list and click **OK**.

Apply the Style



11. Use the **Quick Styles** gallery to apply the new character style to *Woodridge Donation Center* in the table.
12. Use the **Styles** task pane to apply **My Character Style** to *Elk Grove Donation Center* in the table.
13. **Apply** your new style to the remaining donation center names, using either the Quick Styles gallery or the Styles task pane.

Modify the Style

You've decided that the point size in your style is too large, so you will change the point size, and all of the text formatted with that style will update with the change.

14. Hover the **mouse pointer** over My Character Style in the Styles task pane and click the drop-down arrow, and then choose **Modify**.
15. Choose **14 pt** from the Font Size drop-down menu, and then click **OK**.
Notice that all donation center names reformatted to 14 pt.

Delete the Style



16. Hover the **mouse pointer** over My Character Style in the Styles task pane to display the drop-down arrow.
17. Click the **arrow**, and choose **Delete My Character Style** from the menu.
18. When the message appears confirming the deletion, click **Yes**.
Notice that Word removed the style from the names of the donation centers and deleted the style from the Quick Styles gallery and the Styles task pane.
19. Click the **Close**  button in the upper-right corner of the Styles task pane to close it.
20. **Save**  the file, and **close** it.

REINFORCE YOUR SKILLS 7.3

Set Up a New Mail Merge

In this exercise, you will set up a main document and a data source. You will remove unnecessary fields from the data source, sort the data, and execute the merge.

Set Up the Data Source

1. **Open** the rs-Fundraiser Main document from the Lesson 07 folder.
2. Choose **Mailings**→**Start Mail Merge**→**Start Mail Merge**  from the Ribbon, and then choose **Letters** from the menu.
3. Choose **Mailings**→**Start Mail Merge**→**Select Recipients**  from the Ribbon, and then choose **Type New List** from the menu.
4. Click the **Customize Columns** button in the New Address List dialog box to display the Customize Address List dialog box.
5. Use the **Delete** button in the dialog box to remove the following fields (You must select the field names on the list before clicking Delete.):
 - Address Line 2
 - Country or Region
 - Home Phone
 - E-mail Address
6. Click **OK** to complete the changes to the data source.

Enter Data

7. **Enter** the following data into your new data source:


Mr. Sean Corn 308 Alhambra Avenue Monterey Park, CA 91754 626-555-9876	Mr. Craig Dostie Whole Life, Inc. 31200 Erwin Street Woodland Hills, CA 91367 818-555-1711	Ms. Alexia Lopez 2134 Harbor Blvd. Costa Mesa, CA 92626 714-555-9855
Ms. Winston Boey Pasadena City College Pasadena, CA 91104 626-555-1234	Ms. Phyllis Coen Pasadena City College 4745 Buffin Avenue Fremont, CA 94536 408-555-4950	Ms. Margaret Wong Popcorn Video 1308 West Ramona Blvd. Alhambra, CA 91803 818-555-8883

8. Click **OK** when you finish entering the data.

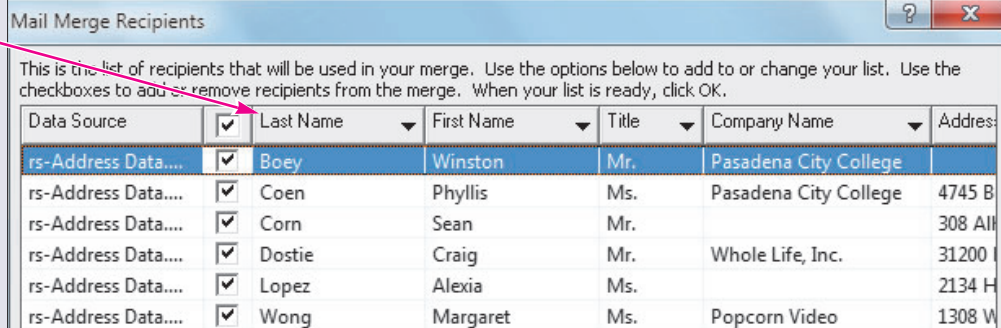
9. Use the **Save Address List** box to navigate to your exercise files.

10. **Save** the data source in the Lesson 07 folder as **rs-Address Data**.

Sort the List

11. Choose **Mailings**→**Start Mail Merge**→**Edit Recipient List**  from the Ribbon.

12. Click the **Last Name** column heading to sort the records on the Last Name field, as shown here.



This is the list of recipients that will be used in your merge. Use the options below to add to or change your list. Use the checkboxes to add or remove recipients from the merge. When your list is ready, click OK.						
Data Source	<input checked="" type="checkbox"/>	Last Name ▼	First Name ▼	Title ▼	Company Name ▼	Address
rs-Address Data....	<input checked="" type="checkbox"/>	Boey	Winston	Mr.	Pasadena City College	
rs-Address Data....	<input checked="" type="checkbox"/>	Coen	Phyllis	Ms.	Pasadena City College	4745 B
rs-Address Data....	<input checked="" type="checkbox"/>	Corn	Sean	Mr.		308 All
rs-Address Data....	<input checked="" type="checkbox"/>	Dostie	Craig	Mr.	Whole Life, Inc.	31200 I
rs-Address Data....	<input checked="" type="checkbox"/>	Lopez	Alexia	Ms.		2134 H
rs-Address Data....	<input checked="" type="checkbox"/>	Wong	Margaret	Ms.	Popcorn Video	1308 W

13. Click **OK** to return to the main document.

Set Up the Form Letter

14. Use the following guidelines to insert codes as shown in the following main document:
- Replace **Today's Date** with a date code that will update automatically.
 - Insert the **Address Block** merge field below the date (as shown in the following illustration), using the first and last name only format.
 - Insert an **appropriate greeting** line followed by a colon.
 - Insert the **Work_Phone** merge field as shown in the last paragraph.

<p>West Coast Youth Services 2500 Ocean Avenue Monterey Park, CA 91753 310-555-6459</p> <hr/> <p>Today's Date</p> <p>«AddressBlock»</p> <p>«GreetingLine»</p> <p>We have decided to hold the annual fundraiser on July 15 in Los Angeles. As you know, last year's fundraiser was a huge success. We hope to make this year's fundraiser equally successful. This will require early planning and effective advertising.</p> <p>Please RSVP as soon as possible. I must know if you can participate in the event. I would truly appreciate your support and commitment.</p> <p>Also, I have your updated address. But I may need an updated telephone number. I currently have your telephone number listed as «Work_Phone». Please contact me and let me know if your number has changed.</p> <p>Sincerely,</p> <p>Cynthia Thompson Fundraising Director</p>
--


Conduct the Merge

15. **Preview** your letters and **correct** any errors you find in the main document or data source.
16. Now **complete** the merge, using the **Edit Individual Documents** option.
17. When you finish, **close** the merged document without saving it.
18. Turn off Preview Results, and then **save and close** the document.


REINFORCE YOUR SKILLS 7.4

Generate Mailing Labels



In this exercise, you will create a labels main document. You will merge the labels document with rs-Address Data.

1. Start a **new** Word document.
2. Choose **Mailings**→**Start Mail Merge**→**Start Mail Merge**  from the Ribbon.
3. Choose **Labels** from the menu.
4. If necessary, choose **5160** from the Product Number box.
5. Click **OK** to apply the settings to the document.


Attach the Data Source

6. Choose **Mailings**→**Start Mail Merge**→**Select Recipients**  from the Ribbon.
7. Click **Use Existing List** from the menu.
8. Choose rs-Address Data from the Lesson 07 folder.

Arrange the Labels

9. Choose **Mailings**→**Write & Insert Fields**→**Address Block**  from the Ribbon.
10. Click **OK** to insert the address block code in the first label.
11. Choose **Mailings**→**Write & Insert Fields**→**Update Labels**  from the Ribbon.
This populates the sheet with codes, ensuring that labels can be positioned at all locations on the sheet.
12. Press **Ctrl** + **A** to select the entire document.
13. Choose **Home**→**Styles** from the Ribbon.
14. Choose the **No Spacing** style from the Quick Styles gallery to remove Word's extra spacing.

Merge the Main Document and Data Source

15. Choose **Mailings**→**Preview Results**→**Preview Results**  from the Ribbon.
16. **Preview** your labels, and then **complete** the merge using the **Edit Individual Documents** option from the menu.
17. Click **OK** to merge all records.
18. Observe your labels. You should see one label for each record.
19. When you finish, **close** the merged document without saving it.
20. Turn off Preview Results, and then **save and close** the file.

Apply Your Skills



APPLY YOUR SKILLS 7.1

Work with Views

In this exercise, you will use the Split command to view a document, and then you will open a second document and use the View Side by Side view to compare the documents.

Split a Document Window

1. **Open** the as-TrainRight Qualifications document from the Lesson 07 folder.
2. **Split** the Word window horizontally, with the split bar approximately in the middle of the screen.
 - Ask your instructor to initial that this has been done successfully. _____
3. **Remove the split** from the Word window.
 - Ask your instructor to initial that this has been done successfully. _____

Use the Arrange All View

4. Position the **insertion point** at the top of the document.
5. **Open** the as-Qualifications document from the Lesson 07 folder.
6. Use the View Side by Side command, and **scroll** through each window separately to compare the formatted and unformatted documents.
7. **View** the two open documents side by side.
8. **Scroll** through the document at the same time.
9. **Close** both files, and then **maximize** the Word window.

APPLY YOUR SKILLS 7.2

Merge a Form Letter with a Data Source

In this exercise, you will create a new main document letter. Then you will create a new address list, but you will remove any unnecessary fields first. Finally, you will execute the merge.

1. Use the **Mailings** tab and the following guidelines to set up a form letter and data source:
 - Use the as-Health Club Main document from the Lesson 07 folder.
 - Your data source should contain only the **three records** shown after the letter below. Remove any **unused fields** from the data source.
 - **Save** the data source document as **as-Health Club Data** in the Lesson 07 folder.
 - Insert the **date** in the form letter as a field that updates automatically.
 - Insert an **address block** and **greeting** of your choice.
 - Insert the **work phone number** field in the appropriate location.

Today's Date

«AddressBlock»

«GreetingLine»

The purpose of this letter is to inform you that your health club membership is about to expire. You have been an excellent member for some time, so we would like to offer you a low renewal rate of just \$99 per year.

Please contact me as soon as possible. This offer will expire on March 31. Also, we currently have your phone number listed as «Work_Phone». Please return the enclosed change of phone number card and let me know if this number is still valid.

Sincerely,

Dave Nelson
Renewal Manager

Enclosure

Mr. David Roth 760 Maple Avenue Fremont, CA 94538 510-555-9090	Mrs. Tammy Simpson Barkers Books 312 Tennessee Street Richmond, VA 94804 510-555-2233	Mr. Jason Williams 2233 Crystal Street San Mateo, CA 94403 415-555-2312
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2. **Merge** the form letter with the data source.
3. Turn off **Preview Results**, **save** the document, and then **close** it.
4. If necessary, **save** any changes to your main document, and then **close** it.

APPLY YOUR SKILLS 7.3**Generate Envelopes**

In this exercise, you will create a new main envelope document and execute the merge.

1. Use the **Mailings** tab on the Ribbon and these guidelines to set up an envelope main document:
 - Use a **standard size 10** envelope.
 - Use as-Health Club Data as the **data source**.
 - Use the **return address** of your choice.
 - Position the **insertion point** in the placeholder toward the center bottom half of the envelope and insert the **default address block**.
2. **Save** the envelope main document in your Lesson 07 folder as **as-Health Club Envelope**.
3. **Merge** the envelope main document with the data source.
4. **Close** the merged document without saving it.
5. If necessary, **save** any changes to the envelope main document, and then **close** it.

Critical Thinking & Work-Readiness Skills



In the course of working through the following Microsoft Office-based Critical Thinking exercises, you will also be utilizing various work-readiness skills, some of which are listed next to each exercise. Go to labyrinthelab.com/workreadiness to learn more about the work-readiness skills.

7.1 Style an Employee Policy Manual

Jenna is formatting the new employee policy manual. Open **ct-Employee Manual Draft** from your Lesson 7 folder and, using Style tools, give it a consistent and professional look. Format the company logo as necessary. Number all of the topics. Ask yourself: Are there any missing that I might reasonably want to see covered in an employee manual? Add a note to the end of the file suggesting topics you would like to see covered. Save the file as **ct-Employee Manual Draft 2**.

WORK-READINESS SKILLS APPLIED

- Showing responsibility
- Reading
- Evaluating information

7.2 Move Sections

Jenna wants to reorganize the manual so that the information flows in a more logical way. If necessary, open **ct-Employee Manual Draft 2** and save it to your Lesson 7 folder as **ct-Employee Manual Draft 3**. Use the Navigation pane to move the president's Welcome message to before Company History and move the Company Mission to before the Company Vision. Rearrange the other sections as you see fit. Use the Split Bar to keep the top portion of the manual visible as you scroll through the document in the bottom pane looking for other thing to improve. Make any changes you feel are necessary and then save and close the file. If working in a group, discuss why you decided to organize the manual as you did. If working alone, type your answer in a Word document named **ct-Questions** saved to your Lesson 7 folder.

WORK-READINESS SKILLS APPLIED

- Reading
- Evaluating information
- Organizing information

7.3 Use Mail Merge

Jenna decides to ask for help from some outside consultants who are experts in employee policy documentation. Create a mail merge data source from the **ct-Consultants** file in your Lesson 7 folder and save it as **ct-Consultant Data Source**. Next, create a form letter thanking the consultants for help and asking them to send you feedback at their earliest convenience. Insert the appropriate address block and greeting line, using the data source, and save the form letter to your Lesson 7 folder as **ct-Dear Consultants Merged**.

WORK-READINESS SKILLS APPLIED

- Exercising leadership
- Using computers to process information
- Writing

For Evaluation Only