WORD MERGING

OFFICE 97

This workshop will provide an overview of completing mail merges to create form letters, envelopes and mailing labels using Word. It also serves as a step toward the knowledge required for Microsoft Certification.

Merge Overview

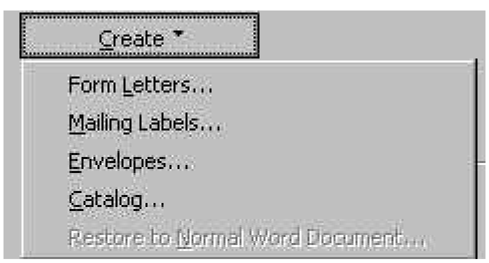
Merging is the process of combining a data file with a form file to create numerous documents, each containing the information from the data file. It is most commonly used to create form letters, labels, and envelopes for mass mailings. The process is guided by a 3 step "Merge Wizard", which helps you Create the Form Document, Create or Acquire the Data, and Combine the Two.

Merging Step by Step

The steps for creating a Mail Merge are to Create the Merge Document, Create the Data File, and to Merge the two together. You need to complete the steps in order, so the merge document must at least be identified, if not completed, before you associate a data file. The Mail Merge Helper will guide you through this process.

Creating Merge Document

A merge document can be made from a new, blank document, from an existing document containing most of a form letter, or can be made to be envelopes or labels. Select Tools/Mail Merge… and in the dialog box that opens, under Step 1, Main Document, click Create… You will be given the following choices:



Select from the choices. Descriptions:

- Form Letters will allow a new or existing document to be modified to include merge fields. It will give you the choice of using the existing (active) document, or create a new, blank one.
- Choosing Mailing Labels allow you to format the document for Avery Labels once the data has been designated.
- Envelopes creates separate mailers for each person, based on the envelope size and style you select.
- Catalog will create a listing of your data, not creating a separate document for each

record, but allowing you to create a directory or checklist.

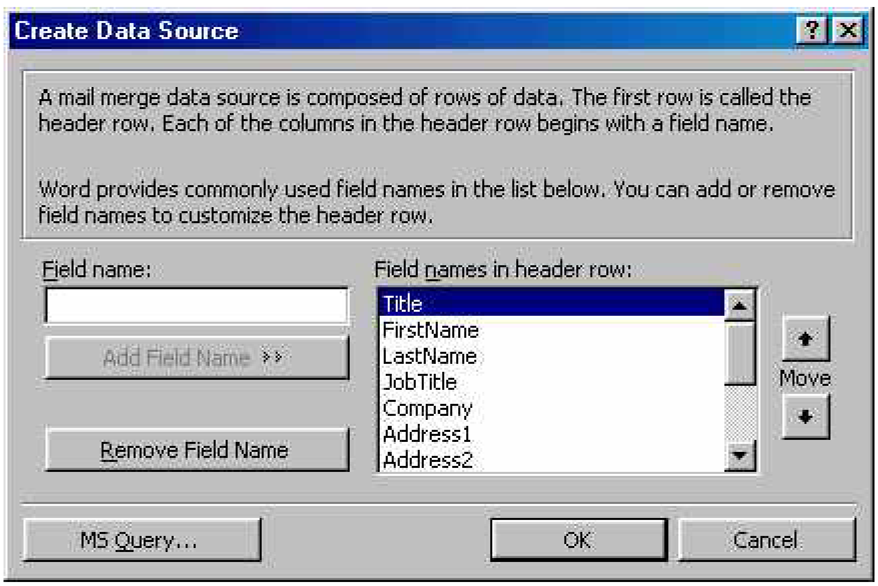
When you make your selection, a dialog box will appear asking if you would like to use the Active Document or Create a New Document. If you have a pre-written form, you can choose Active. Otherwise, to start from scratch, select New. At this point, you will be taken to step two…

Creating Data File

A data file contains all the personal information about the person, or information about an object, you would like to create documents for. This can either be a new file you will create, or a file that has been created previously. We will look at both.

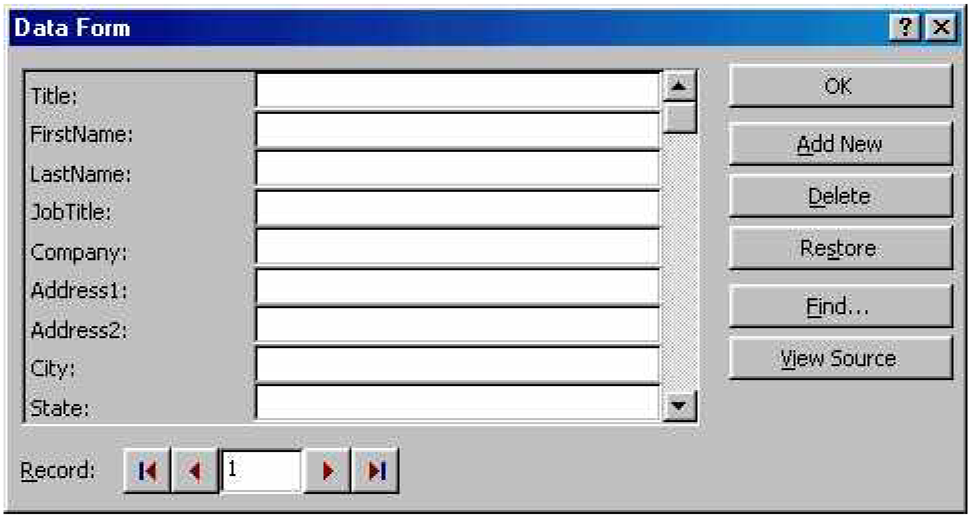
Creating a New Data File

If you are interested in creating a new data file, inputting your own information, then Word allows you to define fields and input directly into a Word document. You do this by clicking Create Data Source beneath Step 2.



The file contains several default fields, Title, FirstName, LastName, etc. These can be used if desired, or you can create your own, or anything in between.

- Clicking Remove Field Name will remove from the list the currently highlighted Field.
- Typing a new name in the Field name box, and clicking Add Field Name >> will place a new field in the list. (Field Names must not contain spaces)
- Using the Up and Down arrows will rearrange the order of the list, for ease of data entry. Highlight the field you'd like to move, and use the arrows to place it in the correct spot on the list.
- When you are happy with your list of fields, click OK.
- You will then be prompted to Save the data file. Choose a location, name the file, and save it.
- After saving, you can choose to Edit the Data File, or the Maid Document. Choose Edit Data File to add information to your list.



You can use the above form to add names to your mailing list. Use either Tab or Enter to move between fields. (HINT: Using Enter will automatically take you to a new Record when you reach the end of the current one. Tab will move between fields, but you must then manually move to a new record when reaching the end of the current one.)
When you close the Data Form, you are taken back to the Main document, where you can edit the data, and/or add data from the records entered.

Using an Existing Data File

In the situations where you have a data file you would like to use multiple times (envelopes and form letters), or for multiple letters, or if you have received a file from another source (external mailing house, Datatel), you can associate a single data file with multiple form documents.

Re-using a Word Data File

Once a data file has been created, you can access it to create any number of new merge documents. Follow the steps above to begin the Merge Wizard, and at Step 2 – Get Data, select “Open Data Source”. Browse to find the existing data file, and click Open. This associates the data with your document, and allows you to insert merge fields into your form.

Using an Excel or Access Document

If your data is stored in an Excel spreadsheet, with the records aligned in rows, you can use it to merge with a Word document. Select “Open Data Source” during Step 2 again…this time, you must change the File Type to read MS Excel Worksheets, or MS Access Database. Browse, select, and Open the file. You will then be met with a dialog box asking you which portion of the spreadsheet you would like to use. With a spreadsheet, you would most likely use the Entire Spreadsheet, but you can identify

"Named Ranges" or give the cell ranges (A1:F5) of the data you'd like to use. With an Access database, you would choose the table or query that contains your data. It then acts like any data file.

Modifying the Form Document

Once the data file has been associated, you will be prompted to Edit the Form Document. This takes you back to the blank (or not so blank) document you identified in Step 1 as your Form.

- Merge Fields are the fields from the data file that contain your information. These need to be inserted into your document in the appropriate places.
- Merge Fields can be formatted just as any text can, and the formatting will be applied to the data that is inserted.
- All spacing and paragraph formatting will need to be done by you.

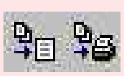
- Using the "View Merged Data" button (at left) will let you see what the finished document will look like. This switch can be toggled on and off to get back to the form.

Using the "Record Controls" buttons (left) will let you view any/all of your data in the form. It works like a CD player control, with previous, next, first and last buttons. You can also type in the number of the record you'd like to view in the box.
More advanced options can be added, including "Word Fields", allowing you to increase what the merge can do. These will be covered in an advanced workshop.

Merging

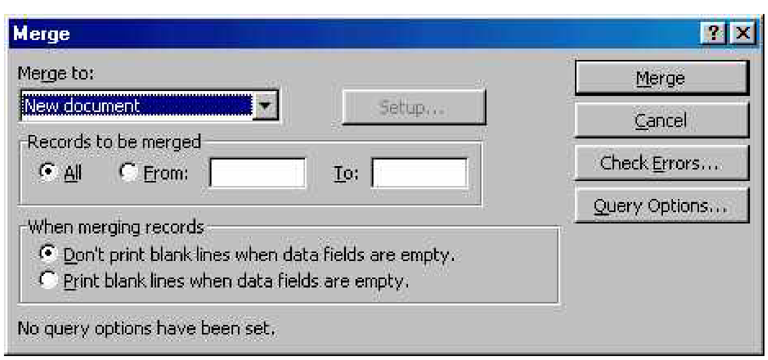
To Merge, or place the individualized information into the form document, there are many options as to how to do this.

- To check the merge document for errors, you can simulate the merge and see any errors, such as missing data fields, or complete the merge and see the errors then. Use the Check for Errors button (at left), and choose to simulate, pause at each error, or report errors following merge.



- You can complete the merge with one click, choosing either Merge to New Document or Merge to Printer (left). This will complete the merge using all records. **Note** Merge to printer will send all documents directly to default printer, without any option of seeing the documents first. This can be dangerous.

- Clicking the Mail Merge button (left) will give you the range of choices, from where to merge, to which records are merged, and what to do with blank fields.



Advanced Merging

Beyond the basic merge, where all records receive a form, you can do many other things. We will look at using a different type of form, and also how to pull out and merge some records from a data file.

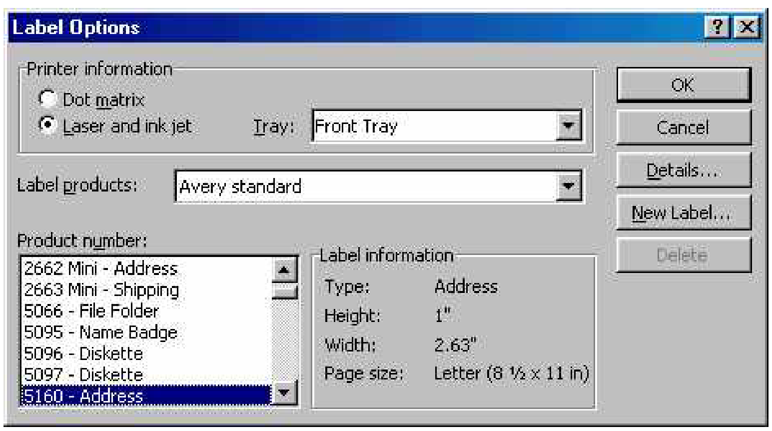
Labels and Envelopes

In the first step of the Merge Helper, you can create Mailing Labels, or Envelopes, by selecting the appropriate choice in the Create drop down list.

Labels

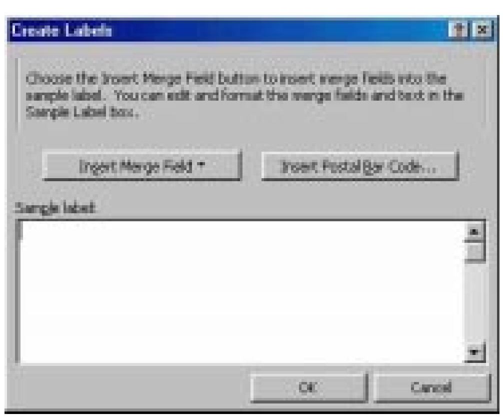
Labels can be created for most popular Avery formats, or, for the very brave, edited and made for any label layouts.

- Complete step 1 of Tools/Merge… by selecting Mailing Labels
- Complete step 2 by creating or identifying your data file.
- Select Set Up Main Document from the window that appears.
- You will get this dialog box:



- At this point, identify the printer information, then select the label manufacturer, and product number. This will prompt Word to set up your document for the designated label type.

Then you will see this window:



The Insert Merge Field button contains all the data fields that Word finds in your data file. Use it to insert the name and address information (or whatever you wish to place in the labels). Remember to be aware of spacing and lines, they are your responsibility. You can also, if needed, add any text that should appear on all labels, e.g., ATTN: in front of the appropriate contact.

When you complete this step, and click Close, your screen will be filled with information…like this:

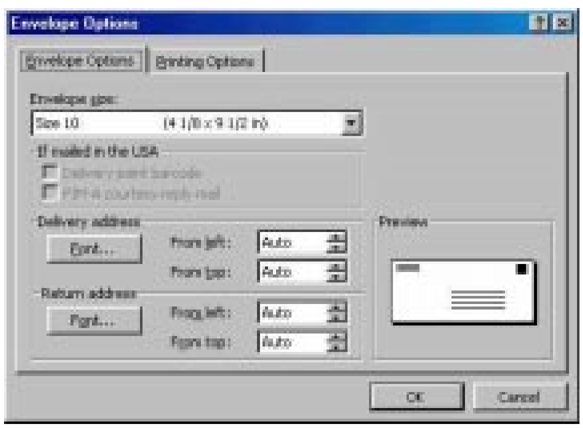
«Requestor» «Product»«Ordered» «Cost_»	«Next Record»«Requestor» «Product»«Ordered» «Cost_»

Word automatically sets up the document, including placing the correct codes (Next Record) to tell the Merge to put one record per label. From this point, merge as before, and you will get a sheet (or sheets) of labels from your data.

Envelopes

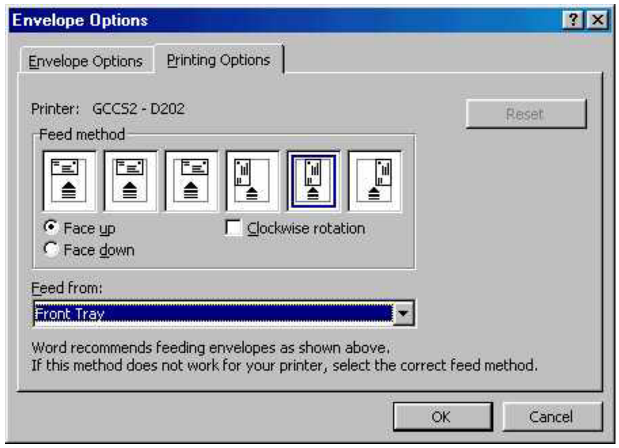
Envelopes can be created for most popular sizes and formats, or can be edited for any envelope layout.

- Complete step 1 of Tools/Merge… by selecting Envelopes
- Complete step 2 by creating or identifying your data file.
- Select Set Up Main Document from the window that appears.
- You will get this dialog box:



Usually, the default setup is correct for envelopes. However, if necessary, you can change the size, or position of text, using the box above.

The printing options will deal with how the envelopes are fed, as well as where they are stored.



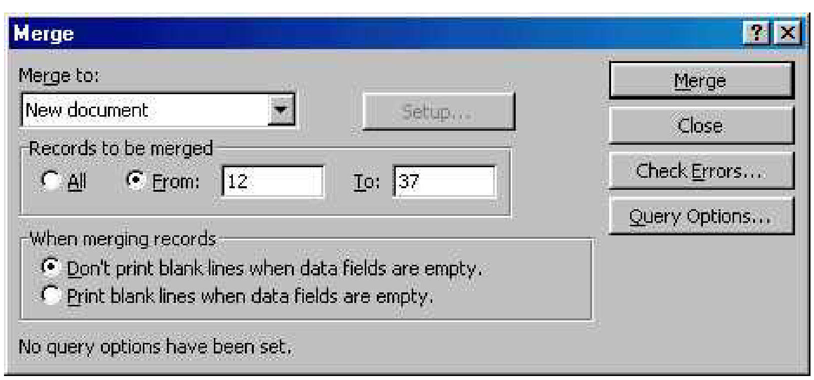
Once these have been selected, you will be given a dialog box to insert your merge information into the envelope form. This box is nearly identical to the label box shown earlier. As with the labels, you can insert fields as well as text and spacing.
Merge as before.

Selecting Records to Merge

Obviously, not all merge documents need to be sent to every individual in the list. We will briefly discuss two ways to select a sub-set of records to merge.

Selecting by Record Number

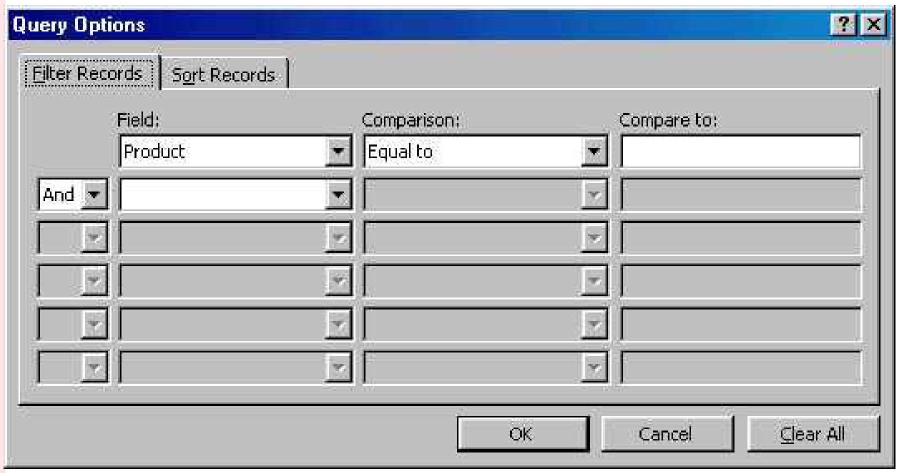
When you select the Mail Merge button (left), you have the options in the corresponding dialog box to select a range of records to merge.



In this case, only records 12 through 37 will be included in the merge. This is OK if you have a neatly organized list, and can identify ranges of records that need to be included. If not, you need to use the second option, Selecting by Criteria.

Selecting by Criteria

By clicking Query Options… on the above window, you will be taken in to a dialog box that will allow you to define which records to merge, based on a criteria you define.



On this screen you can define one or many "matches" that the record must make to be included in the merge.

- The field drop down contains the names of the fields in your data file.
- Comparison includes: Greater than, Less than, Equal to, Not Equal to, Greater than or Equal to, Less than or Equal to, Blank, and Not Blank.
- Compare to: is the value that you want to match. For example:

State	Equal to	IA
Salary	Greater than	20000
Date	Blank	

By completing multiple lines, you can select by more than one criteria. The box on the left contains And, and Or, for the inclusive or exclusive relationship.

Remember…AND means both criteria have to be met to be included…and OR means either criteria can be met to be used.