CMPT 109-33 Lab5

Lab Activity 5

Activities
*Before moving to Excel we'll some additional features in Word (for more info on word, see http://csam.montclair.edu/~sannih/word/word.htm)
*Excel
  • Introduction (Starting, Open & Saving Workbook, Navigating/Naming/Moving Worksheets; Printing <all & selection> WorkSheets)
  • securing your files (applicable to other office products like word)
  • file naming (extensions vis-a-vo others)
  • creating single table (cells) and generating charts (pie) using the chart wizard.

Complimentary Notes
let's review these important features in Word

Printing Envelopes & Labels
~ from the menu bar select [Tools, Letters & Mailing, Envelopes & Labels]

Track Changes With the Track Changes feature turned on, each insertion, deletion, or formatting change that you or a reviewer makes is tracked. As you review tracked changes, you can accept or reject each change.
~ from the menu bar select [Tools, Track Changes]

Mail Merge
Uses of Mail Merge
~Can create a form letter that goes many different people.
example: (First letter says "Dear Kenny," second letter says "Dear Kyle, third letter says Dear Stan, etc.)
~The form letter is created once and is "merged" with a database of information to create all of the letters
~ Can create a sheet of mailing labels.
Basic Principles of Mail Merge
Phase I: Create a database containing the information you need.
~The database consists of fields (columns) and records (rows)

example:
field: First Name, Last Name, Address, City, State, Zip.
record: Stanley, Marsh, 201 SP drive, South Park, CO, 33941

another example:

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Address</th>
<th>City</th>
<th>State</th>
<th>Zip</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stanley</td>
<td>Marsh</td>
<td>201 SP drive</td>
<td>South Park</td>
<td>CO</td>
<td>33941</td>
</tr>
<tr>
<td>Kyle</td>
<td>Broslofski</td>
<td>411 Ikey Lane</td>
<td>South Park</td>
<td>CO</td>
<td>33941</td>
</tr>
<tr>
<td>Eric Theodore</td>
<td>Cartman</td>
<td>666 FA Ave</td>
<td>South Park</td>
<td>CO</td>
<td>33941</td>
</tr>
</tbody>
</table>
Kenny McCormick 1313 Deadmans Pl. South Park CO 33941

~We'll encounter this again in Excel and Access!

**Phase II:** Create the Form Letter (Word calls it the "Main Document")

~You can insert the names of the above fields in the form letter.

For example, «FirstName» «LastName» «Address1» «City», «State» «PostalCode»

Dear «FirstName» «LastName»,
Please consider our hot lunch. It is very tasty.

**Phase III** Merge the Form Letter

~"Merge" the form letter ("Main Document") and the database.

To do it manually in Word:
To see the mail merge tools, click on 'View', 'Toolbars', 'Mail Merge'.
Click on the 'Main Document' icon on the Mail Merge toolbar.
Simply choose 'Letter'. You may choose any other type you need in future.
Now, click on the 'Open Data Source' icon from the Mail Merge toolbar. Then locate the data source and its appropriate file type.
All other mail merge icons should be active now.
Next, click on the 'Insert Merge Field' icon from the Mail Merge toolbar.
Once you are done, you can then merge to new document, fax, or email using their respective icons.

**Using Mail Merge Wizard in Word**
From Menu Bar, "Tools" then "Mail Merge."
Follow the steps in the Wizard. In these steps, you'll do the following:
Specify the type of "Main Document" you want to create (e.g., form letter or mailing labels).
Create the "data source" (i.e., database).
Specify the fields you want in your database.
Enter the records into your database.

Can move back and forth between records to edit them.

After entering the records into your database press "OK"
Create the form letter (the "Main Document").
The "Mail Merge" toolbar appears, using the drop down menu insert desired fields
When you're done creating the form letter, go back to "Tools" and "Mail Merge," and then merge the document with the data (option #3).
Follow the instructions of the wizard.
Note: Form letters & databases can be reused.

**Things to remember:**
a. can have multiple data sources
b. field names must be less than 40 characters, must not contain spaces, must not contain extraneous characters, and must begin with a letter.
c. in one data source you can not have a field with the same name.
d. mail merge toolbar
e. can sort by field name