



# Word 2

Mail Merge and Formatting Text  
Office XP version

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CAL People and Computer Training  
University of California, Berkeley

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Use this  
space for notes

## Introduction

**Word 2** is a course created for CAL PACT participants to increase your knowledge of the features of Microsoft Word. This course covers selected intermediate level material and applies to both the Windows and Macintosh computer platforms. This document serves as a future reference for you as you continue to gain experience on your own. Some topics may not be covered in as much detail during the course as they are in this document. Documentation for previous versions of Word may be found on the CAL PACT website at <http://calpact.berkeley.edu>

### Skills you need for this course

- How to use the mouse
- Familiarity with the Windows or Mac operating systems
- Knowledge of basic computing concepts
- Solid understanding of the material covered in the CAL PACT Word 1 course

### Skills and concepts you will learn in this course

- Mail merge
- Sections, Columns, and Breaks
- Tables
- Borders & Shading
- Margins & Indents
- Drop Caps
- Find & Replace
- Templates

### Conventions used in this document

Menus and menu commands are separated by a vertical bar ( | ). In the document they will appear as **Menu|Command**. An example of this is: “Select **File|New...**”

## Mail Merge

Mail Merge is a powerful tool that can create personalized form letters, envelopes, and mailing labels. It consists of three basic components: the Main Document, the Data Source, and the Merged Data.

The **Main Document** is the form letter, the mailing labels, or envelopes. This is similar to a template. The information stored in the Main Document is the basic format of the document that *will not* change with each letter, label or envelope.

The **Data Source** contains the personalized information for each letter, mailing label, or envelope that *will* change with each letter, label or envelope. Examples of information contained in the data source file include first name, last name, address, city, state, and ZIP code.

The third component is the **Merged Data**. At this final stage the main document and the data source are merged into a single file or sent to the printer to create each individual letter, label, or envelope.

### *What Is Covered in Mail Merge:*

- Creating a Main Document for a Form Letter
- Specifying a Data Source
- Creating a New Data Source
- Inserting Merge Fields into a Main Document
- Merging a Data Source with a Main Document

## The Big Picture

Creating any type of mail merge document involves merging a **Main Document** with a **Data Source**. We will create a form letter in class. In addition to the Main Document and Data Source discussed above, Word uses **Merge Fields** to act as place holders to represent data (such as names and addresses) that you want to insert into your Main Document from the Data Source. The individual Merge Fields instruct Word where to place different types of data (name, address, etc.) from the Data Source.

## Creating a Main Document for a Form Letter

The first step in creating a form letter is to open or create a document to use as the Main Document. This Main Document contains the text, punctuation, spaces, graphics, and any other textual or formatting information that will remain the same in each letter. To get started, follow these steps:

1. **Open or create** the document you will use as the **Main Document**, just as you would any document (a letter in this case). This document can be an existing letter, a template or any letter you need to circulate widely.

2. Select **Tools|Letters and Mailings...** The **Mail Merge Wizard** will be shown as well as the **Mail Merge Toolbar** option.



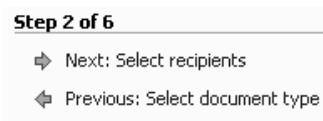
3. Under **Document type** (step 1), click on the **Letters...** option and then click on the **Next: Starting Document...** button on the bottom.
4. Click on the **Use the current document** button to use the currently open document as the Main Document.



## Specifying the Data Source

To indicate which information to merge with the Main Document for the form letter, specify the **Data Source**. The Data Source file serves as a database consisting of the information that will be merged with the Main Document. The Data Source file is organized into individual records. Each record consists of fields representing the types of information that you will personalize. The fields can be names, addresses, and any other type of information you specify. You can create either a new Data Source or open an existing one. (Data Source files may be used multiple times.)

5. Click **Next: Select recipients** at the bottom of the **Mail Merge Palette** to view the options for the Data Source. This will allow you to use an existing list, select from Outlook sources, or type a new list.



## Creating a New Data Source

When you create a data source using the **Mail Merge Palette**, Word creates a new file and organizes the information in a table. The table contains a column for each category of information. The table contains an **Enter Address Information** section which shows each of the specified **Field Names** as headers for each column. Each row contains the information for each **Data Record** contained in the Data Source. When merged with the Main Document each Data Record will produce your personalized form letters, labels or envelopes, in the same order as the records appear in the Data Record. Just follow these steps:

6. (Continuing from previous) Select the **Type new list** button. Then click on the **Create...** option below and a **New Address List** dialog window will appear, shown here.

**FYI**

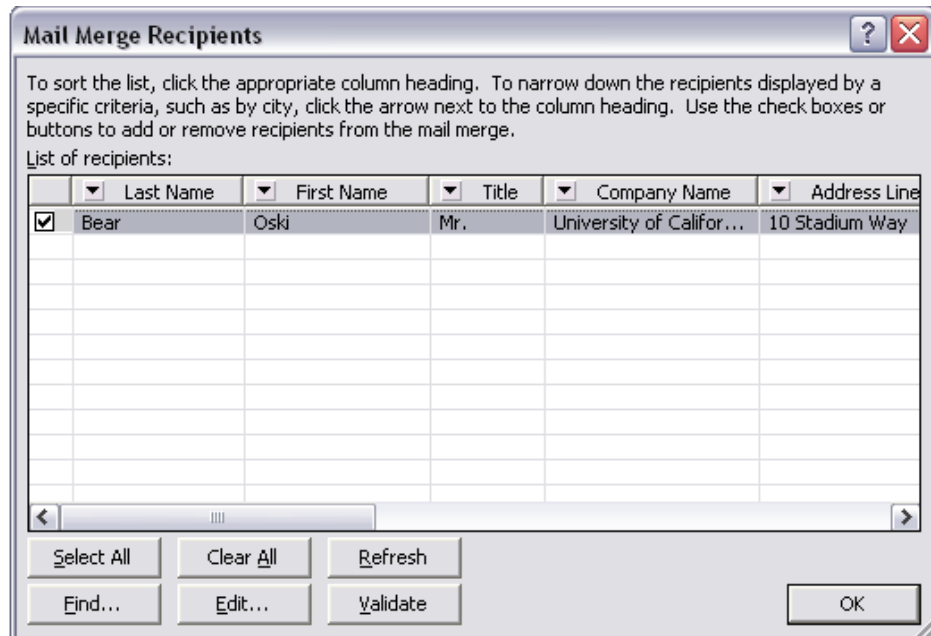


Field names have spaces in the name.

7. To add or remove a field from the list, click the **Customize...** button. When adding a new field, you may change the order of the fields by simply highlighting a field and clicking the **Move up...** button or **Move down...** button.
8. When you are satisfied with the field names, click **OK**. Continue typing in the information for all of your contacts. When you have completed your list, click on **Close**.
9. You are now required to save the new Data Source. Type a file name, select where you wish to save the data, then click **Save**.

10. Word then has options to edit, validate, and search the Data Source in the Mail Merge Recipients dialog box, shown below. Clicking on the down arrows next to the field names (such as “Last Name” or “Title”) will allow you to choose certain entries. This is called “filtering.” Make sure that all of the individuals you want to include in your mail merge project have a checkmark next to their record, then click **OK**.

In the Mail Merge task pane on the right, click **Next: Write your letter** to move to step 4.



## Writing your letter and Inserting Data Source Fields

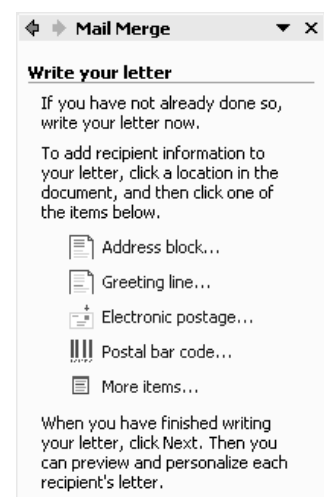
If the letter is not on the main screen already, you can select another letter or create one at this point.

Step 4 of Mail Merge is integrating the fields from your Data Source into the correct locations in your main document (a letter in our example). Place your cursor in your document where you want the field to be, then click on the appropriate option in the task pane on the right. You can also click More items... to select specific fields to incorporate from your data source.

### Caution



Word will not put spaces between Merge Fields automatically. If you do not *manually* insert spaces, the merged results will lack spaces where you may want them.

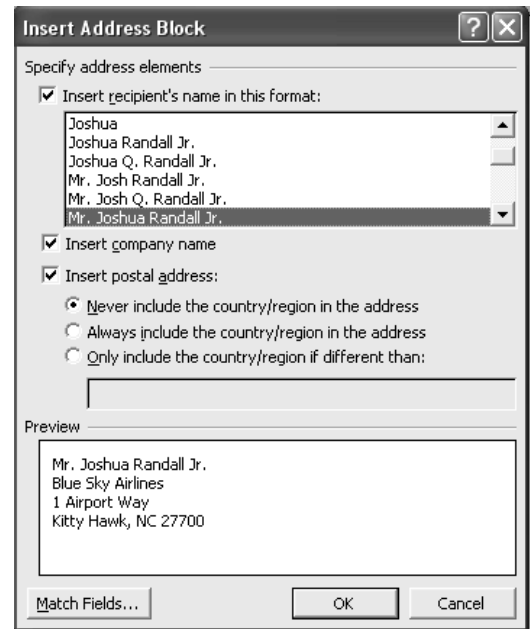


Selecting the first option, Address block... will bring up the Insert Address Block window, shown to the right. In this window, you can quickly specify the address elements you want incorporated into your letter.

The result on letter will show as follows:

««AddressBlock»»

When you are finished specifying all of the fields you want in your document, click the **Next: Preview your letter** button to move to step 5.

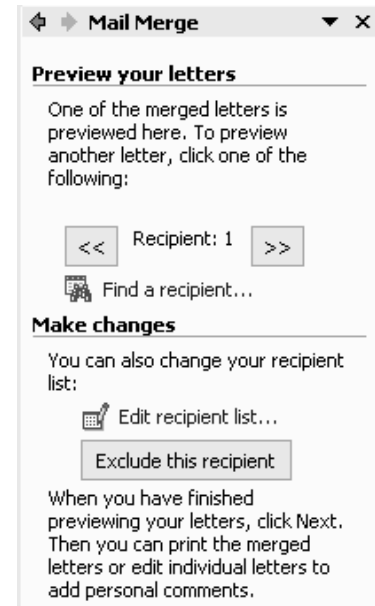


## Preview Your Letter

In this step you will be able to view your completed letter with the actual data shown from your data source. To move up or down the list of recipient's names, click the << or >> buttons.

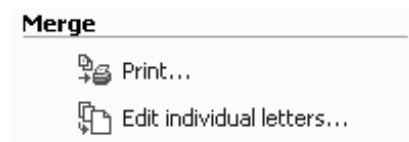
If there is a specific recipient to whom you don't want this letter to be addressed, simply click the

**Exclude this recipient** or **Edit recipient list...** to change the current list.



## Complete the Merge

This is the final step! Click **Print...** if you are completely satisfied with your letter and data list. If you would like to go back and edit letters or edit the data recipient list, simply click **Previous...** on the bottom of the page, and you will be guided backwards in your process.



## Intermediate Word Formatting Options

### Columns, Sections, and Breaks

You can create documents in Word with several sections or several columns. Word allows you to apply columns and other formatting options to different sections of a document, as well as the document as a whole. There are three kinds of breaks which help you control the format of the entire document and of each section.

A **Page break** will automatically end the current page and force any additional text to begin on a new page.

A **Column break** is similar to a Page break except that it ends the current column and forces any additional text to begin in the next column.

The **Section break** is different from other breaks. By inserting a Section break, the document can be divided so that each section acts as a separate entity for purposes of formatting. Think of each section as being a separate mini-file. Each section can have its own individualized page setup.

To insert a break, place your cursor at the location where you wish the break to be, then select **Insert|Break...** Choose the type of break you want to insert, then click **OK**.



### Note

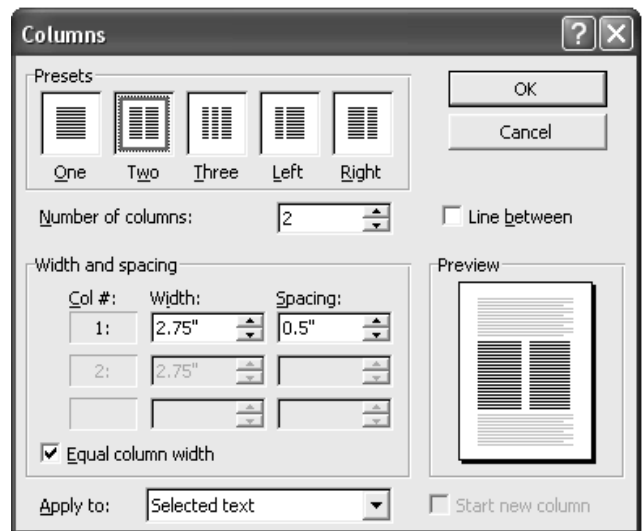


Page breaks and Section breaks can be inserted anywhere in the document. Column breaks are useful only in sections of the document which are set up with more than one column.

To modify your document to display in multiple columns, select **Format|Columns...** The Columns dialog box will appear, shown to the right.

Make sure that you specify how much of the document to which you wish to apply the column formatting. At the bottom of the box, the **Apply to:** option will allow you to choose between Whole document, or From this point forward. To only change the number of columns in existing text of your document, first highlight the area before selecting **Format|Columns...** In the **Apply to:** box, you will have the additional option to choose **Selected text**. However, if you previously inserted section breaks, you may place the cursor anywhere within a section and choose the number of columns to apply to that section.

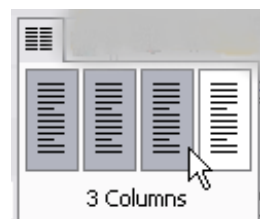
You can also quickly choose to modify your columns from the toolbar button shown to the right.



### Tip




In Normal view, only one column can be seen at a time, regardless of the actual number of columns. By using Print Layout view, all columns can be seen at the same time. When using the more advanced formatting features in Word, Print Layout view is highly recommended (and sometimes necessary). Switch between Normal and Print Layout by choosing **View|Normal** or **View|Page Layout**, or by clicking the view buttons at the bottom left corner of your Word window.



## Tables

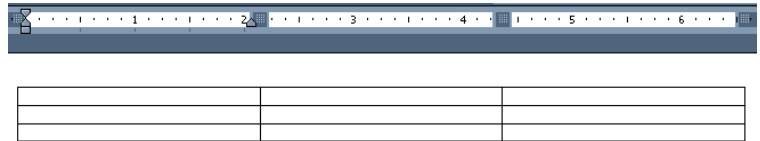
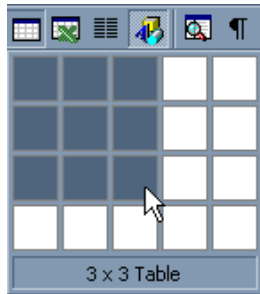
With tables, you can arrange columns of numbers and text in a document without having to use tabs or indents, all in an orderly grid-like pattern. Text can be presented in side-by-side paragraphs, as in a résumé, or arranged beside graphics.

To insert a table in your document, place your cursor where you would like the table to appear. Then click the Insert Table button (  ) on the Standard Toolbar and drag the pointer to fill the desired number of cells you want in the table. Once you determine the dimensions, click and your table will appear.

### Note



Word draws a thin border around tables by default. To see only the gridlines for your reference, you should select the table and use the Border button to select no border.



### *Navigating and Manipulating a Table*

- Add text into a cell by clicking within it and typing.
- Pressing the Tab key will move the cursor to the adjacent cell to the right. Shift + Tab will move the cursor to the adjacent cell to the left. Control + Tab will move one tab stop over *within* a cell.
- Paragraph returns within a cell will increase the height of the entire row containing the cell.
- Change the column width by moving the column dividers in the **Ruler**. Note that these column dividers appear in the ruler only when you place the cursor at some point within the table.
- To delete a row or column, highlight the area and select **Table|Delete** and the appropriate submenu command (**Table**, **Columns**, **Rows** or **Cells...**).
- To hide table gridlines, choose **Table|Hide Gridlines**.
- Use the arrow keys to move space by space within a cell and throughout the table.
- An easy way to highlight entire columns or rows is to select **Table|Select|Row** or **Table|Select|Column**. An alternate method to highlight entire columns is to position the mouse so that it appears as a down arrow, and then click the mouse button to select the column. You can also highlight the entire table by selecting **Table|Select|Table**.

### Tip



At the last cell in the table, push the right arrow key on the keyboard until the cursor is positioned just outside the table boundaries. Press **Enter** to automatically add a new row.

**Note**

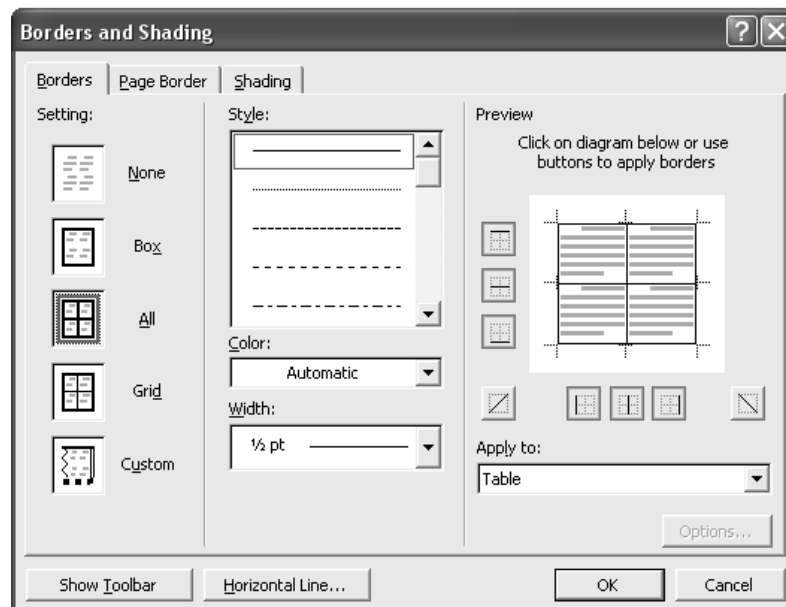
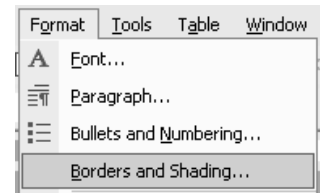
Colors will be printed as shades of gray on non-color printers.

**Note**

The Page Border section of the Borders and Shading dialog window allows you to apply border and shading effects to the whole document or to specified sections.

## Borders and Shading

You can create borders around text, tables, and images to draw special attention to certain areas of your document. Using borders to customize the appearance of a table is especially useful. Shading can also be added to selected areas, in grayscale and color. To apply borders or shading to an image, table, or text, choose **Format|Borders and Shading...** The **Borders and Shading** dialog window will appear.



Note the **three different window tabs** in the dialog window.

Use the section under the **Borders** tab of the dialog window to create a border around a selected area of text or an image. This is also used to create borders around tables and to modify the appearance of individual cells or groups of cells within tables when a table (or an area thereof) is selected.

Use the section under the **Page Border** tab to apply borders to entire pages of your document. Note the similarity between the Borders section and the Page Border section. Be sure you are working in the section in which you intend to work.

Use the section under the **Shading** tab to add shading to selected areas.

**Note**

You must use **Print Layout** view to see drop caps properly. Word will ask to switch to Print Layout view if it is not already in that view. To remove a drop cap, simply click in the paragraph that contains the drop cap, choose **Format|Drop Cap...** and select **None** in the Position of the dialog window.

**Drop Caps**

In Word, a paragraph can have a large initial letter or word called a **Drop Cap**. You can apply drop cap formatting to just the first letter of a paragraph, the entire first word, or some of the letters in the first word. To have the entire word or part of the word dropped, select the letters to “drop”. If nothing is selected or if more than one word is selected, only the first letter will be dropped by default. To format a drop cap, select **Format|Drop Cap...**

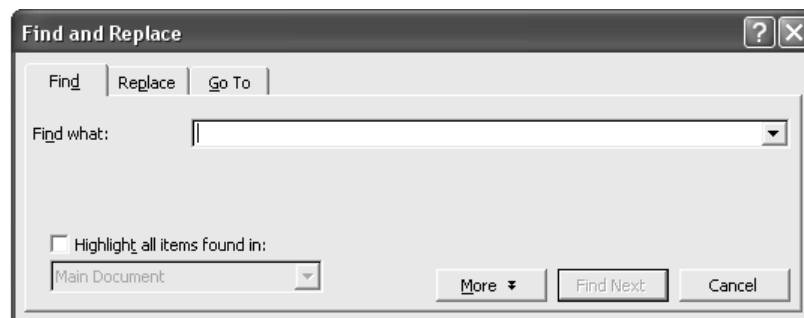
The **Drop Cap** dialog window provides two options for positioning the letter (or word), as well as an option to have no drop cap (useful if you want to remove drop cap formatting previously applied). The **Dropped** option positions the drop cap at the upper left of the paragraph with the text wrapping around it. The **In Margin** option positions the drop cap to the left of the text with no text wrapping. The bottom portion of the dialog window provides options for changing the font of the dropped letter. Adjust how large the dropped letter will be by selecting the number of **Lines to Drop**. You can also adjust the spacing inserted to the right of the drop cap, between the drop cap and the normal text by changing the value in the **Distance from Text** field.

**Tip**

You can also use the **Go To** section of the Find and Replace dialog window to quickly move to the next format or object change. Click the **Go To** tab, then choose the field you want to find and click **Next**.

**Find & Replace**

Word provides a Find and Replace command to quickly find single or repeated occurrences of text in your document, and replace it with alternate text of your choosing. To quickly find specific text or formatting, select **Edit|Find....** To replace multiple occurrences of text or formatting with alternate text or formatting, select **Edit|Replace....** Either of these commands will bring up the same **Find and Replace** dialog window. The different tabs will give you access to the different sections as with other subdivided dialog windows.



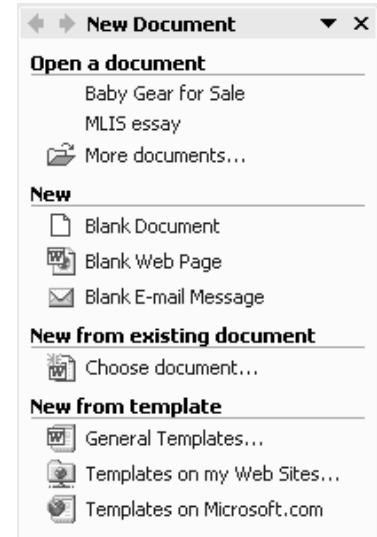
**Note**



If you can't find the templates, it may be that they were not installed with Word. Talk to your system administrator if you have questions about this.

## Templates

A template is like a blueprint for the text, graphics, and formatting of a document. Templates can be used over and over again as a guide for commonly used documents to avoid having to recreate documents from scratch. Word provides pre-designed templates for many common types of documents such as memos, reports, business letters, and fax cover sheets. You can also create your own templates tailored to fit your individual needs.



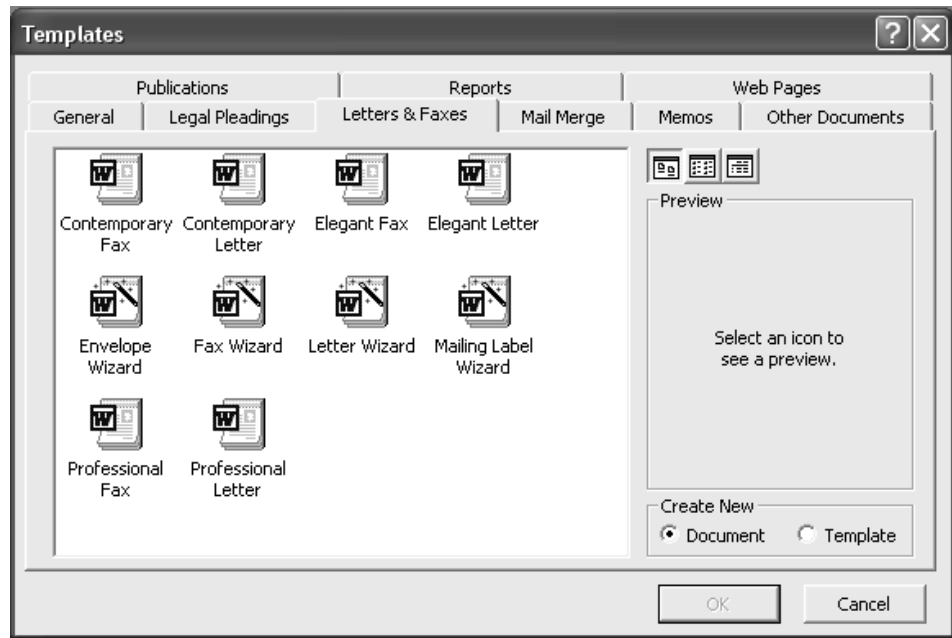
**Note**



Many templates have previews available. If a preview is exists, it will appear on the right-hand side of the New dialog window when you click on a particular Template.

### Basing a Document on a Template

1. Choose **File|New....** The **New** dialog window will appear.
2. The New window is subdivided into different tabs based on the type of document you want to create. Click the appropriate tab and choose the Template on which to base your document. (The default is **General**).
3. Click on the **OK** button.



**Caution**

If you do not click the Template radio button, your template will be saved as a regular Word document rather than as a Word template.

**Creating Your Own Template**

1. Choose **File|New....**
2. In the **New Document** dialog window on the right hand side of the screen, under the **New from template** choose from the general templates, templates on your own web sites, or templates from Microsoft.
3. Set up all the styles, formatting, or text desired in your new Template.
4. Choose **File|Save** to save your new Template.

**Modifying an Existing Template**

1. Choose **File|Open....**
2. In the **Files of Type** pull-down menu, select **Document Templates**.
3. In the **File Name** field, type or select the name of the Template to modify, then click **OK**. (**Note**: be sure the **Look in:** field is directing Word to the Templates folder).
4. Edit and format the Template as desired.
5. Select **File|Save** to save your customized Template.

Explore and experiment with these features to learn how Word can make your work easier, and even fun.

**Continue to Enhance your Word Skills**

There are also many other features of Word XP that we have not covered during our Word series. Microsoft Word Help offers a comprehensive listing of topics that can help you along your way to becoming a Word expert. We encourage you to explore and experiment with these features to learn how Word can make your work easier, and even fun.



## **Leave your mark: Keep track of changes**

Tracking changes allows multiple individuals to have input on one document. When an individual suggests a change, the original information is kept in tact and the suggestion is added. This way, you can both “see where you’ve been” and “see where you want to go.”

1. Open the document you want to revise or review.
2. On the **Tools** menu, select **Track Changes**. When the **Track Changes** feature is enabled, **TRK** appears on the status bar at the bottom of your document. When you turn off change tracking, **TRK** is dimmed.
3. Make the changes you want by inserting, deleting or moving text or graphics. The changes will appear highlighted and/or underlined, but you can modify this.

### ***To change the font color and formatting of tracked changes***

1. On the **Tools** menu, click **Options**, and then click the **Track Changes** tab.
2. To change the color and formatting options of your tracked changes, in the **Track Changes options** section, choose the color and formatting you want.

There are other options you can play with in that dialog box – you have to test them out to see what works best for you.

Leader characters such as dotted, dashed, or solid lines in Word documents can draw the reader’s eye across space in a line. You can automatically insert leader characters to fill the space used before a tab stop. You use tab stops to line up columns of the text.

### ***To display deleted text with strikethrough formatting***

1. Start Word. A new blank document opens.
2. If the **Reviewing** toolbar is not visible, on the **View** menu, point to **Toolbars**, and then click **Reviewing**.
3. On the **View** menu, click **Print Layout**. This sets up the document view so that you can see any changes you make.
4. Type some text in the page.
5. On the **Reviewing** toolbar, click **Track Changes**.
6. Select a few words of text, and press DELETE. The text appears in a balloon in the right margin of the page.
7. On the **Reviewing** toolbar, click **Show**, click **Options**, and, on the **Track Changes** tab, choose **Never** from the **Use Balloons (Print and Web Layout)** list. This action gets rid of the balloons and displays the deleted text with strikethrough formatting in the body of the document.
8. Click **OK**.