
UNIT 8 ADVANCED FEATURES IN WORD

Structure

- 8.1 Introduction
- 8.2 Mail Merge
- 8.3 Tables
- 8.4 Let Us Sum Up
- 8.5 Check Your Progress Exercise
- 8.6 Answers to Check Your Progress Exercise

→ NOTE

'Advanced Feature' by no means is difficult to learn; it is just that it is very specific in its usage!

8.1 INTRODUCTION

In this Unit you will be taught some advanced features offered by MS-Word, which if learnt properly, can be extremely useful in certain situations. The two most important features are the Mail Merge and the Tables.

In a business environment, it is often required to send letters with identical information to a group of people who are at different locations, with different information for instance each recipient will have a different name and address. This is taken care of by Mail Merge feature of word.

Tables help you to organize complex columnar information. You can use tables to create diverse documents and forms, television scripts, financial reports, catalogues and resumes.

→ NOTE

Database is a special type of a file that is designed to store information like name, address, phone, city, country etc of each employee of a company etc.

Objectives

After going through from unit, you will be able to:

- use mail merge, and
- create and edit tables.

8.2 MAIL MERGE

What is Mail Merge?

In simple words, *Mail Merge is a utility offered by word to allow making the content of a letter once and making as many letters out of it as you want each with different personal information (of the recipient) to give the impression as if each letter was created individually.*

Thus, for instance, if you want to invite 50 people on your birthday party you will write just one letter of invitation (known as the main document, explained ahead), you will store all the 50 names and addresses of people whom you intend to invite in one place (known as data source, explained ahead), then you will tell word to merge the two information (the main document and the data source) and create 50 letters of invitation each with different name and address on it.

Before knowing exactly how to use 'Mail Merge', you should know about a few of the terms that we will be using repeatedly in this discussion.


1. **Data Source** – A data source is nothing but a place where all the personal information like names, addresses, phone numbers etc are stored. It could be a simple file or could be database. Mail Merge uses this data to make different letters with the same content but different personal information.
2. **Main Document** – This is the identical content that appears in each letter that mail merge creates. The main document can be a letter, envelope, mailing label, or another type of document.
3. **Merging** – This is the process that creates as many letters as we want using the data source and the main document.

TIPS

Even if you are sending a similar letter to a unique list of people who you will not need to contact again, it is faster to use the mail merge feature.

The alternative—to write one letter, print it, change the address, print the second letter, and so forth—is a rather time consuming task.

WHAT CAN IT DO FOR ME



- Preparing list of people who will receive a newsletter.
- Sending out thank you letters for people who helped with a workshop or meeting.
- Composing “rejection” letters at the end of a search process.
- Creating a file of people who will receive monthly mailings during the course of a project.
- Printing name tags for a conference.
- Sending circulars to each student’s house regarding parent-teachers meeting or any similar communication.

Performing a Mail Merge involves three basic steps. These steps are highlighted for your reference in Figure 8.1.

1. Creating a main document.
2. Creating a data source, as shown, in the Figure 8.1. This step also involves adding, deleting and modifying data records.
3. Editing the main document and merging the data file and the main document.

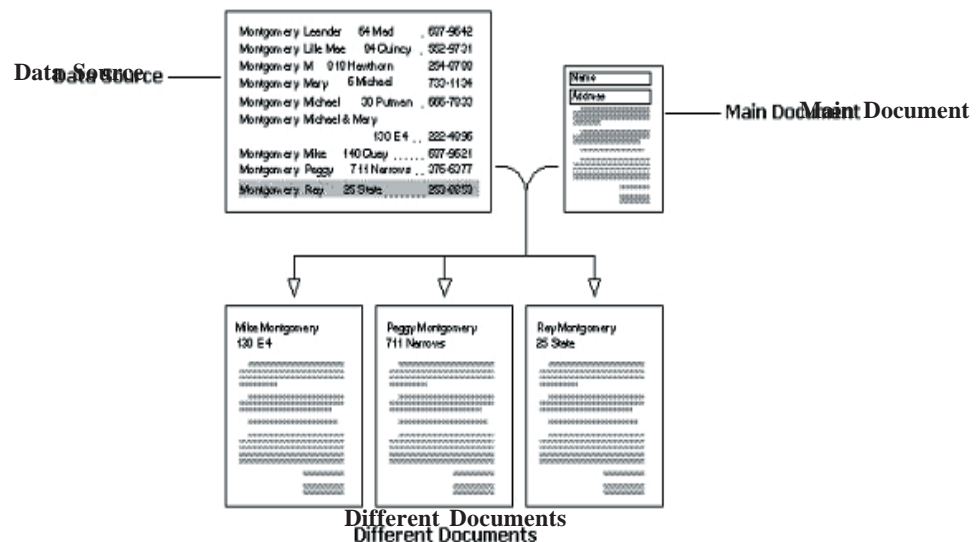


Figure 8.1 : Process of Merging

Creating a Main Document

To create a main document, the steps are:

1. Select the Mail Merge option, as shown in the Figure 8.2, from the Tools menu.

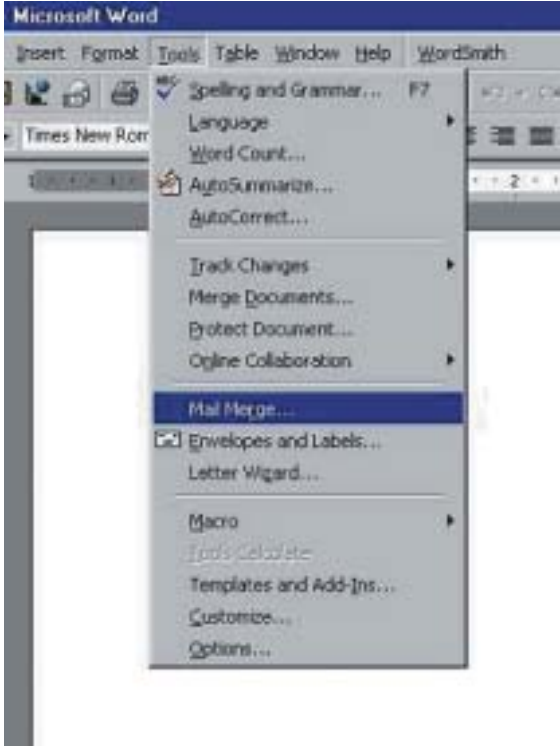


Figure 8.2 : Mail Merge

2. The Mail Merge Helper dialog box gets invoked as displayed in Figure 8.3.

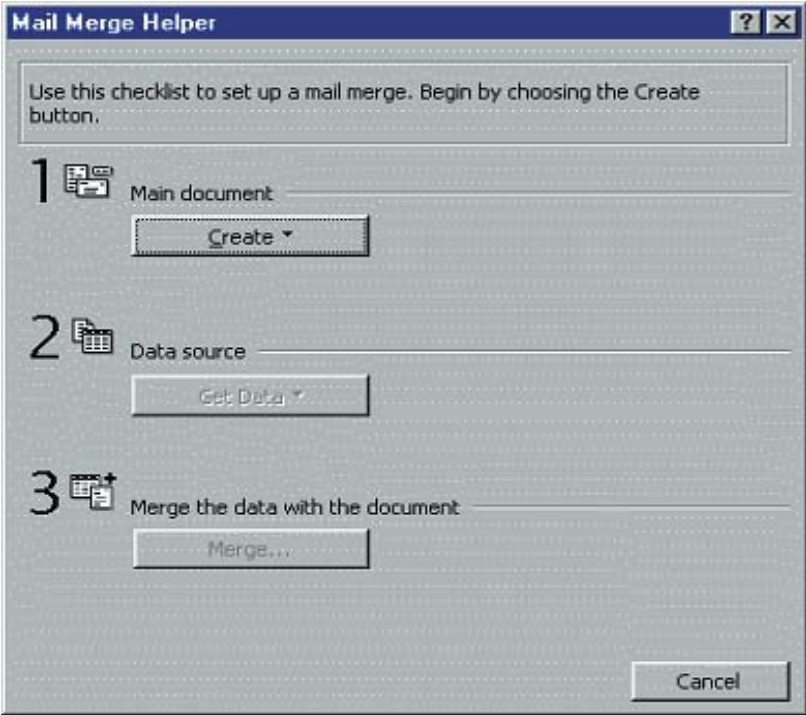


Figure 8.3 : Mail Merge Helper

3. Click on the 'create' button in the 'Main Document' area. The 'create' drop-down list is displayed as shown in the Figure 8.4.

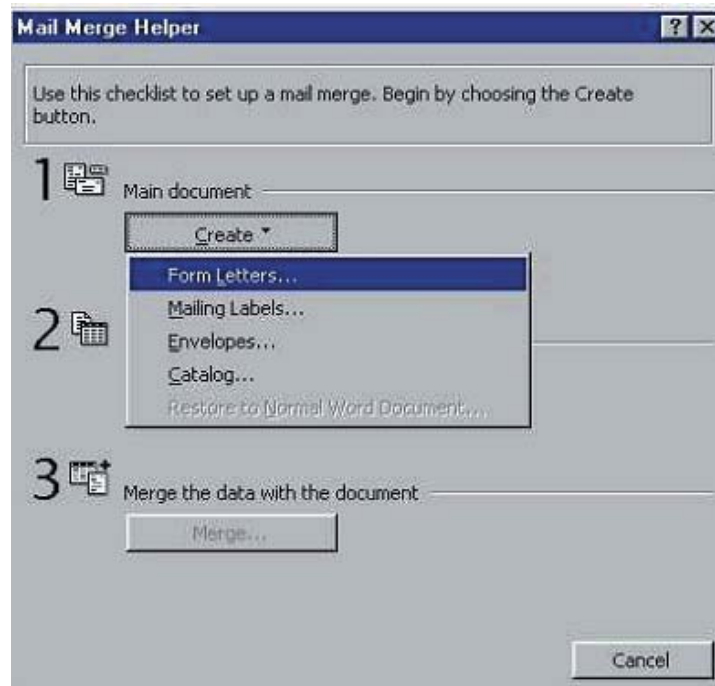


Figure 8.4 : Create Main Document

4. Select any of these displayed options, say 'Form Letters' option from the drop-down list. A Microsoft Word dialog box gets invoked as displayed in the Figure 8.5.

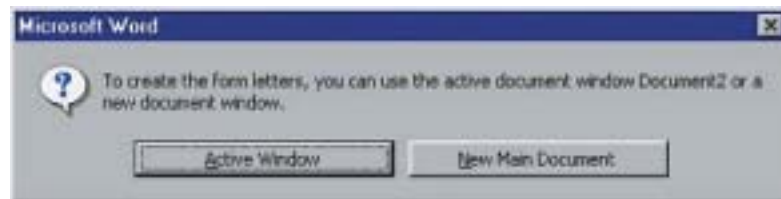


Figure 8.5 : Choose Main Document

5. Click on the 'Active Window' button to confirm that the currently active document is to be the main document, or click on the 'New Main Document' button to open a new document as the main document.
6. Once the main document is created, the Mail Merge Helper dialog box is reactivated as displayed in the Figure 8.6. To change a Mail Merge document into a regular Word document by breaking the connection between the main document and the data source, select 'Restore to Normal Word Document' in the 'Create' drop-down list.



Figure 8.6 : Create Main Document

Creating the Data Source

In a Word data source file, the field name should begin with a letter and can contain as many as 40 characters, including letters, numbers and underline characters, but no spaces. To specify a data source, follow these steps:

1. Click on the Get Data button in the Data source area of the Mail Merge Helper dialog box. A Get Data drop-down list is displayed as shown in the Figure 8.7(a).

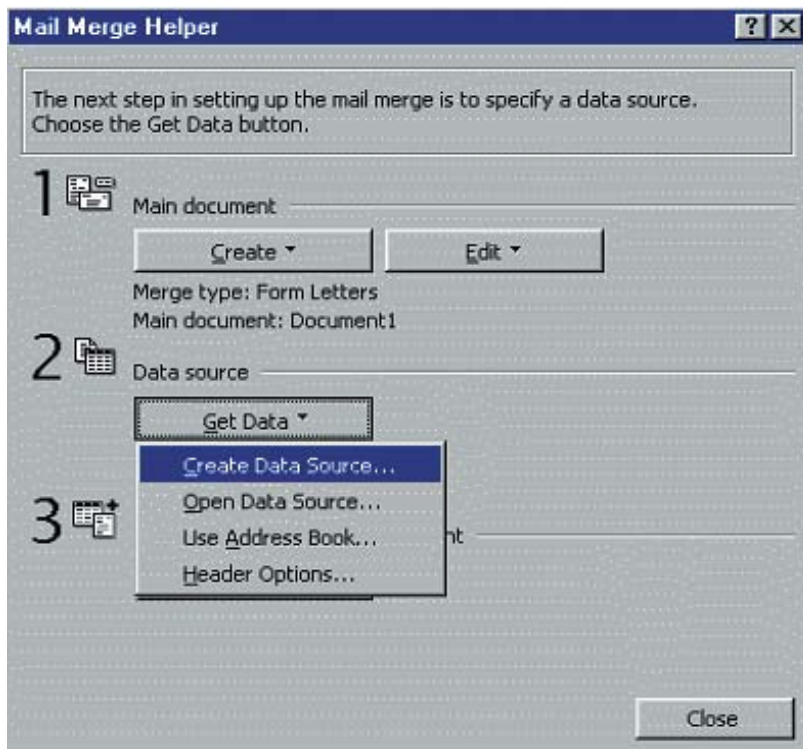


Figure 8.7(a) : Creating Data Source

2. Select the Create Data Source option from the Get Data drop-down list to create a new document as the data source. A Create Data Source dialog box gets invoked as displayed in the Figure 8.7(b).

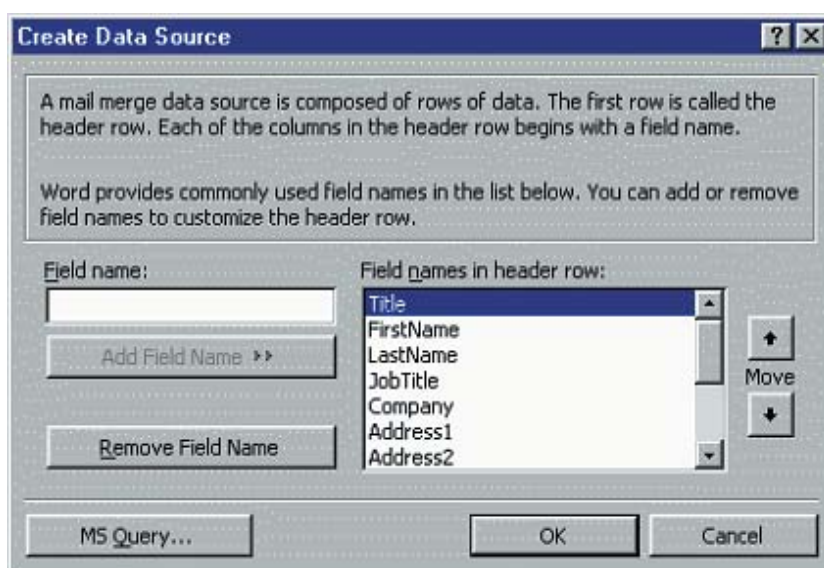


Figure 8.7(b) : Creating Data Source

3. To create a new field, type the new field name in the 'Field Name' text box. Click on the 'Add Field Name' button to add the new field name to the end of the Field names in header row list box.

→ NOTE

In a database when information like name, address etc is stored each such piece of information like name is known as a field.

4. To move an existing field name, highlight it in the Field names in the header row list box. Select the up arrow and the down arrow in the dialog box to move its position in the list.
5. To delete a highlighted field name, select Remove Field Name button.
6. One by one delete all the fields that are already presented to you.
7. Type the Field name, Rollno in the Field name text box and press 'Add Field Name' button.
8. Type the Field name Marks in the Field name text box and press 'Add Field Name' button.
9. Type the Field name Subject in the Field name text box and press 'Add Field Name' button.
10. Type the Field name Address in the Field name text box and press 'Add Field Name' button.
11. The Created Data Source should look like the one shown in the Figure 8.7(c).

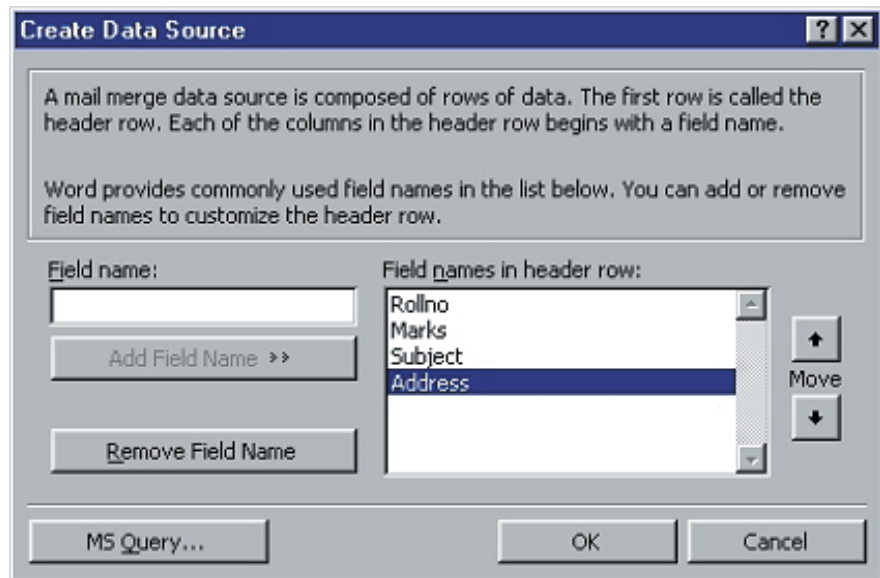


Figure 8.7(c) : Creating Data Source

12. Click on the OK button of the Create Data Source dialog box. The 'Save As' dialog box gets invoked as displayed in the Figure 8.8.

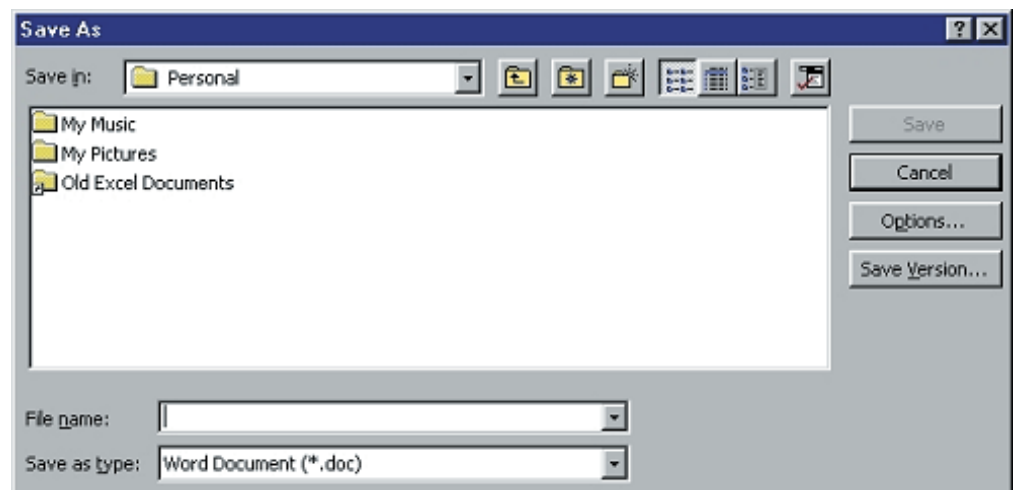


Figure 8.8 : Saving Data Source

13. Type the name for the data source and save it. The Microsoft Word dialog box gets invoked as displayed in the Figure 8.9.

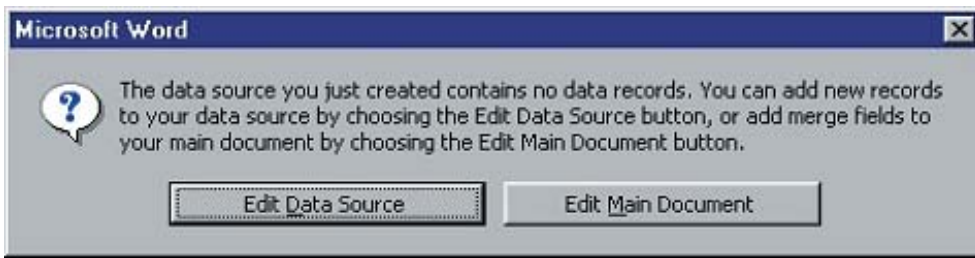


Figure 8.9 : Prompt to add records

14. Select the 'Edit Data Source' button to add records to the data source or select the 'Edit Main Document' to modify the text in the main document. Suppose we press the 'Edit Data Source' button, the dialog box as shown in the Figure 8.10 appears.

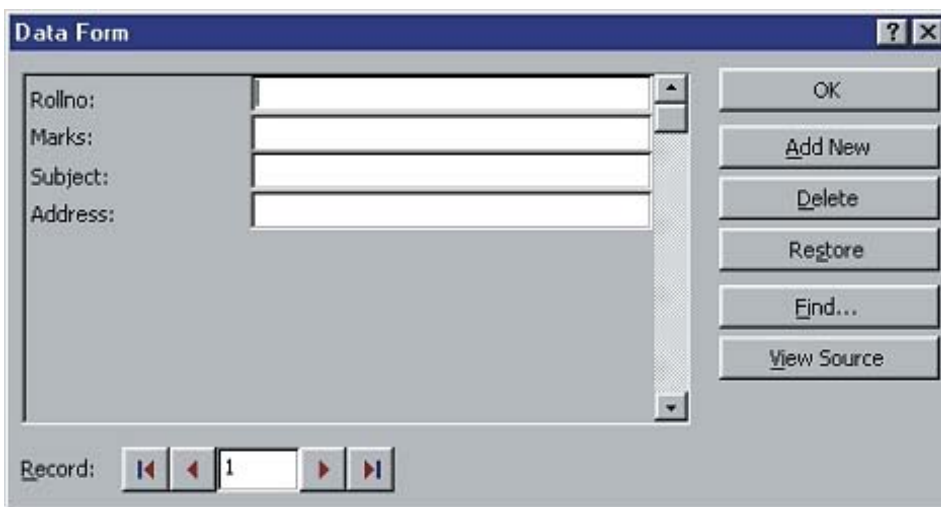


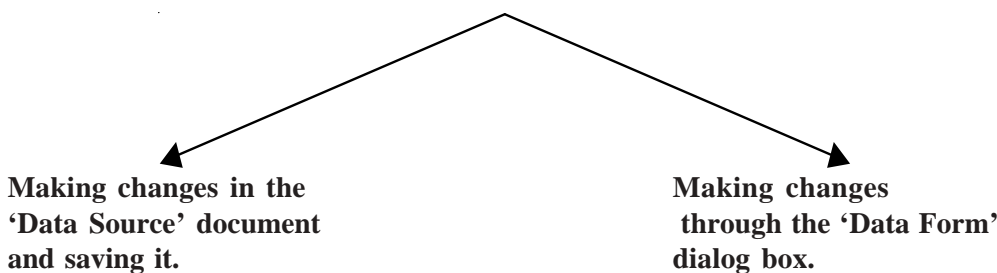
Figure 8.10 : Add records

Do not add the records actually right now, just press the close button on the above screen, as the 'adding records' process is covered in the next section. In this section we restrict ourselves to the creation of an empty data source only.

Adding, Editing, Deleting Records

Once you have created a data source, you should add to it the records you want to include. Also you would like to edit or delete the records once they have been added. All these operations can be broadly performed through two methods – either changing the table appearing in the 'data source' document or making changes in the 'data form' dialog box.

Adding, Editing, Deleting Records



Adding Records To a Data Source

To add records to a data source file, follow these steps:

1. Click on the Mail Merge Helper button on the Mail Merge toolbar to invoke the Mail Merge Helper dialog box as displayed in the Figure 8.11.



Figure 8.11 : Mail Merge Toolbar (Mail Merger Helper Button highlighted)

2. Click on the Edit button in the Data source area of the Mail Merge Helper dialog box as highlighted in the Figure 8.12. Click on the Document name.

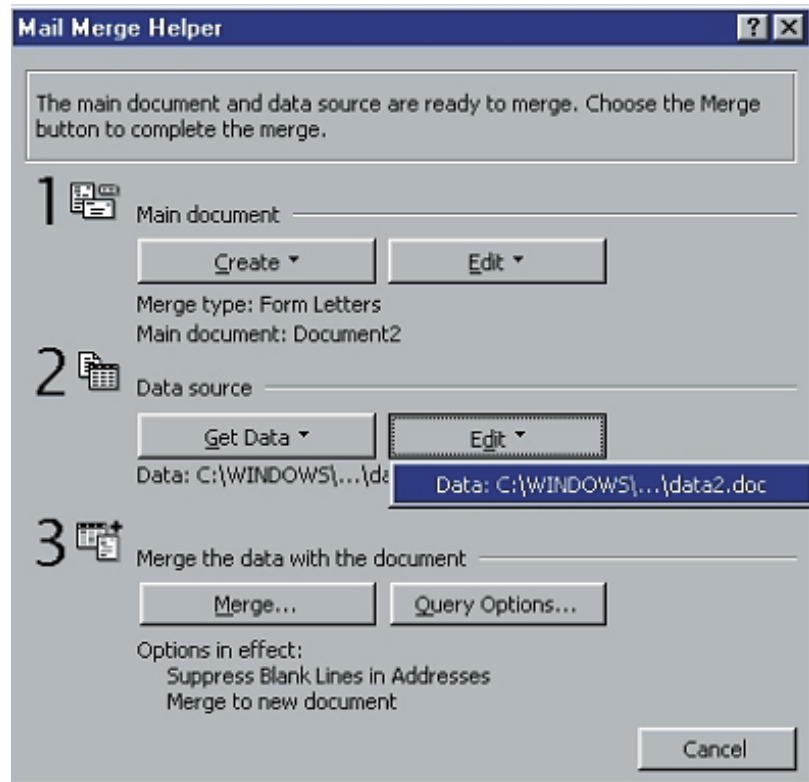


Figure 8.12 : Mail Merger Helper

3. Alternatively, click on the Edit Data Source button in the Microsoft Word as displayed in the Figure 8.13. The Data Form dialog box gets invoked as displayed in the Figure 8.13.



Figure 8.13 : Mail Merge Toolbar (Edit Data Source Button highlighted)

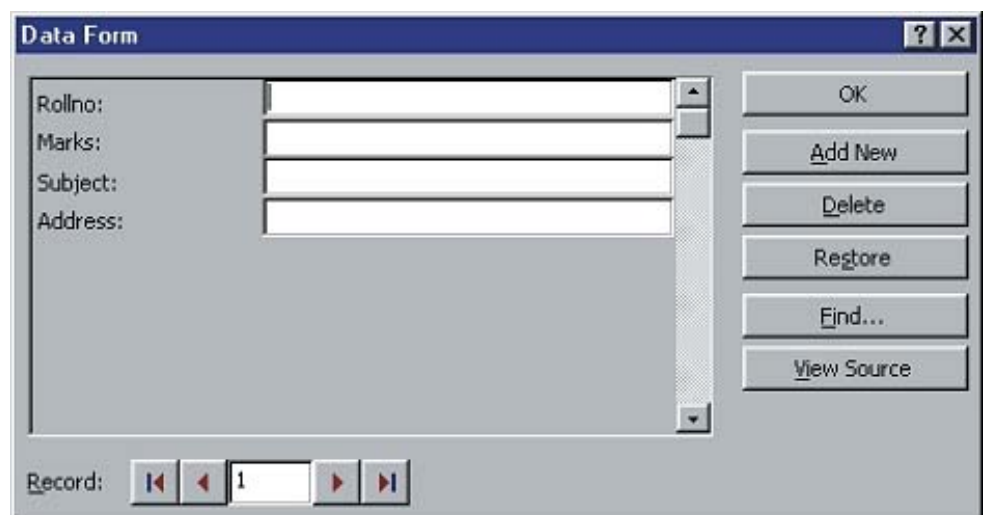


Figure 8.14 : Add Record

4. Consider a case where the following records are to be added to the data form as displayed in the Table given below to create the Data Form Screen as shown in the Figure 8.14.

Roll No.	Marks	Subject	Address
R001	88	Maths	Hari nagar
R002	98	Maths	6/326 geeta colony
R003	79	Maths	Computer division, IGNOU

5. Type the appropriate information in the first text box and press Enter to enter the information in the displayed record. Move the insertion point to the next field in the text box. Click on the 'Add New' button of the 'Data Form' dialog box (Figure 8.14) to add another blank record and enter information for that record.
6. Select the 'View' button from the data source document as displayed in the Figure 8.14.

Roll No.	Marks	Subject	Address
R001	88	Maths	Hari nagar
R002	98	Maths	6/326 geeta colony
R003	79	Maths	Computer division, IGNOU

TIPS

Alternatively (as already explained) for adding records you could also go to the 'Data Source' document and directly type in the details into the table itself, be sure to save the data source.

7. Click on the Save button of the standard toolbar to save the data source.

Editing (modifying) a Record in the Data Source

Change any of the data directly in the table cell that contains it in the data source document. Figure below shows the changed Marks and Address in the third record. These changes are reflected in the Data Form also as shown in Figure 8.15.

Roll No.	Marks	Subject	Address
R001	88	Maths	Hari nagar
R002	98	Maths	6/326 geeta colony
R003	70	Maths	Computer division, IGNOU

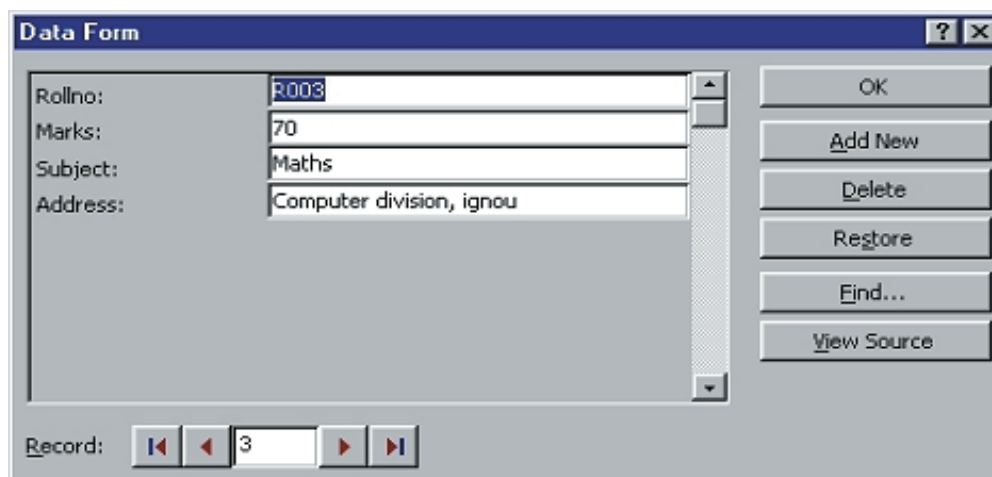


Figure 8.15 : Adding Records In the Data Source itself

Deleting a Record

1. Type the number of the record you want to display in the Record text box.
2. Click on the Delete button in the Data Form dialog box to delete the record. In the Data Form dialog box, open the record with 'Rollno' R001 as shown in the Figure 8.16 and click on the Delete button.

→ NOTE

Thus the important conclusion is that any sort of modification or addition done to data source document, if saved is appropriately is reflected in the 'Data Form' dialog box.

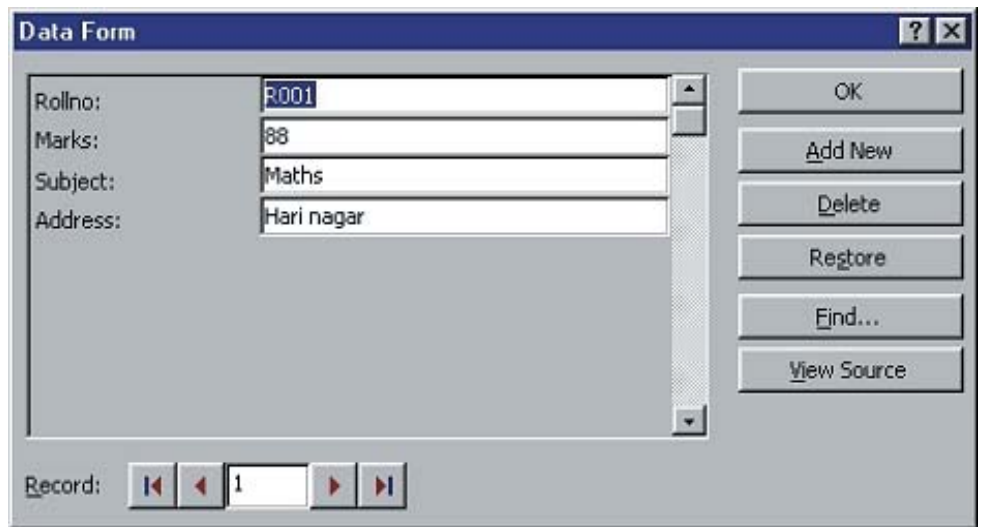


Figure 8.16 : Deleting a Record

After deleting the record, click on the View Source button to view records in the data source document as shown in the Figure 8.16.

Roll No.	Marks	Subject	Address
R001	88	Maths	Hari nagar
R002	98	Maths	6/326 geeta colony
R003	70	Maths	Computer division, IGNOU

3. Click on the Restore button to reverse the last changes made to the displayed record.

Editing The Main Document

After you have created a data source, you can insert the data source field names into the main document as merge fields. To do so, follow these steps:

1. Select the Mail Merge option on the Tools menu or click on the Mail Merge Helper button on the Mail Merge toolbar.
2. Click on the Edit button in the Main document area of the Mail Merge Helper dialog box.
3. Select the filename from the Edit menu in the Mail Merge Helper dialog box as illustrated in Figure 8.17 to activate the main document.

→ NOTE

Data Source Fields refer to the fields present in the data source which are for know inserted into the main document to indicate where actual specific information from the data source will eventually be inserted.



Figure 8.17 : Activating the Main Document

4. Edit the text in the main document window. Write whatever common text you want should appear in each letter independent of the specific information.
5. Position the insertion point where you want to add a merge field.
6. Click on the Insert Mail Merge field button on the Mail Merge toolbar as displayed in the Figure 8.18 and select the field to be inserted.



Figure 8.18 : Inserting the merge Fields

7. Type the characters or punctuation you want to include with this field.
8. Click on the Save button of the standard toolbar to save the main document.

Merging the Data File and the Main Document

Now since the data source and the main document are ready, we are ready to merge the two to spin magic! In the following few lines and paragraphs you will realize the true potential of the 'Mail Merge'. Use this as often as you can to be more comfortable with it. To merge the data file and the main document, follow these steps:

1. In the main document, click on the View Merged Data button on the Mail Merge toolbar as highlighted in the Figure 8.19. This displays the fields from the first record of the data source in the main document.

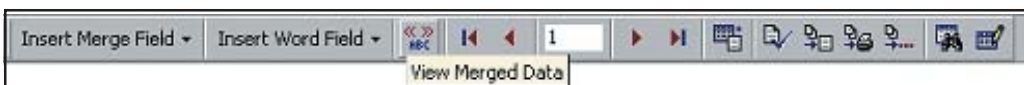


Figure 8.19: View Merged data

2. Click on the Mail Merge Helper button on the Mail Merge toolbar to invoke the Mail Merge Helper dialog box.
3. Click on the Merge button of the Mail Merge Helper dialog box. The Merge dialog box gets invoked as displayed in the Figure 8.20

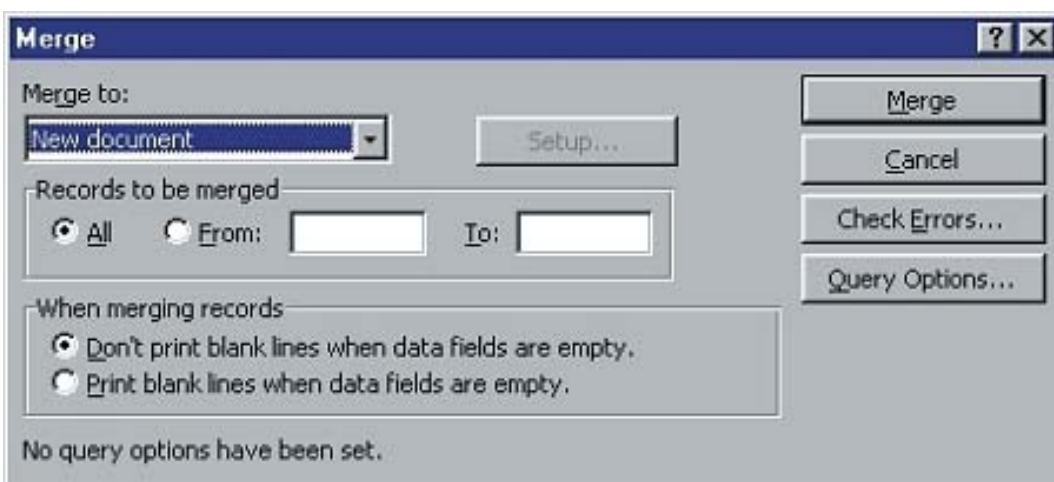


Figure 8.20: Merge dialog box

4. Click on the Merge to drop-down list to select any option.
5. Click on the Merge button of the Merge dialog box to merge the data source with the main document.

8.3 TABLE

Tables are made up of rows and columns of data entered into 'cells'. The 'cell' content is the text, which can be formatted with the same methods as are used to format any other text. Each table has a border associated with it, which appears as soon as the table is created but it is not binding on you, you can delete the border if you want.

Creating Table

To create a table, follow these steps:

1. Select the Insert Table option from the Table menu, as shown in Figure 8.21. Alternatively, click on the 'Draw Table' button of the standard toolbar, as displayed in the Figure 8.22 and drag the mouse over the palette to create a table with the highlighted number of rows and columns.

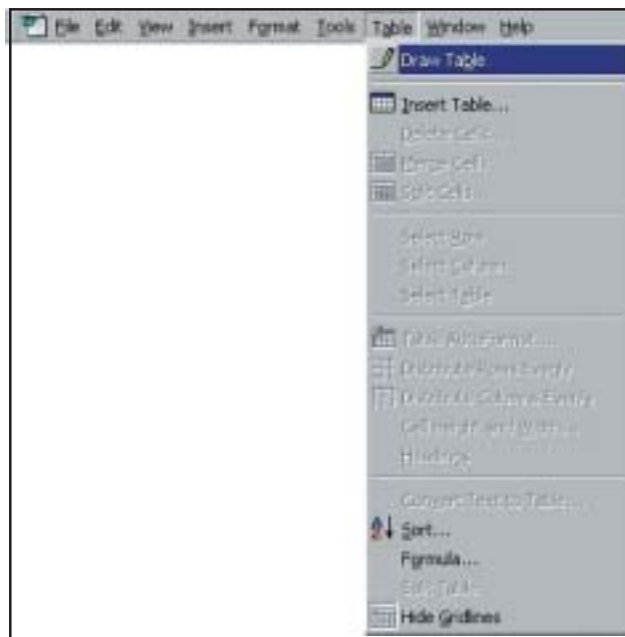


Figure 8.21: Table menu



Figure 8.22: Table toolbar

2. If you choose the 'Table' menu to create the table, 'Insert Table' dialog box is invoked as given below.

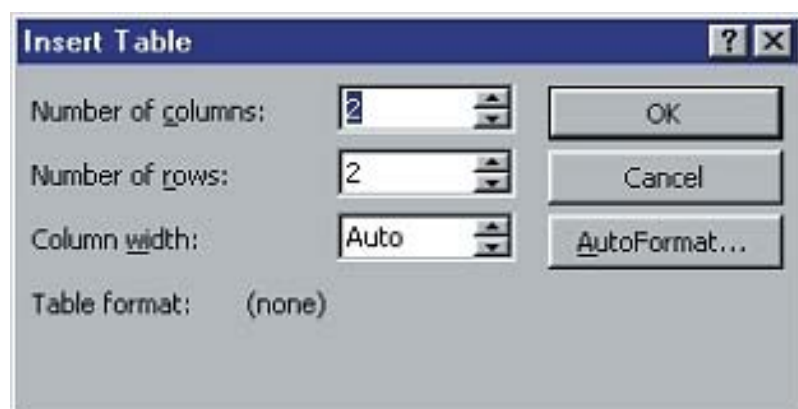


Figure 8.23: Insert table

But if you choose to create the table through the toolbar (mouse pointer changes into a pencil, similar to the one on the toolbar), as you drag the pencil, a rectangle is formed in which could be split into desired number of rows and columns.

3. Word allows you to have tables in some formats that are already designed for you. Of course you can have the table in your own formats. Select any of the following options to define the contents of the table in the 'Insert Table' dialog box:
 - In the Number of columns text box, define the number of columns in the table.
 - In the Number of rows text box, define the number of rows in the table.
 - In case you want to use word's formats in the 'Insert Table' dialog box press 'Auto Format' button. A 'Table Auto Format' dialog box gets invoked, as displayed in Figure 8.24.

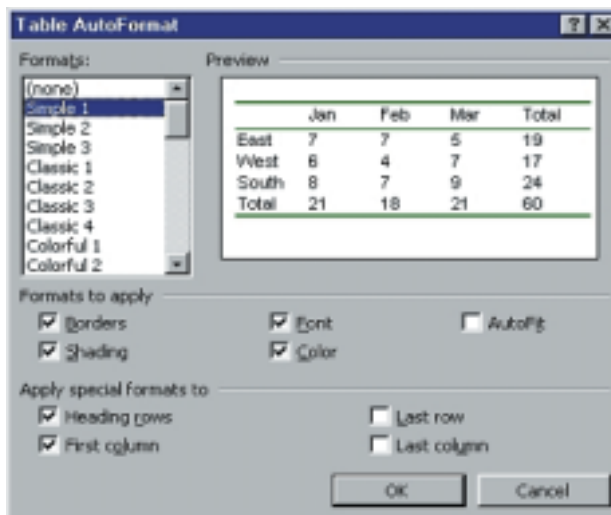


Figure 8.24: Table AutoFormat

The Table AutoFormat dialog box lets you select the style of the table you want to create.

Converting Table to Text

Word also enables you to convert the data in a table into regular text. To change tabular data into regular document text:

1. Select the table rows that contain the text you want to change into paragraphs.
2. Select the Convert Table option from the Table menu. A 'Convert Table To Text' dialog box is invoked, as displayed in Figure 8.25 (a).

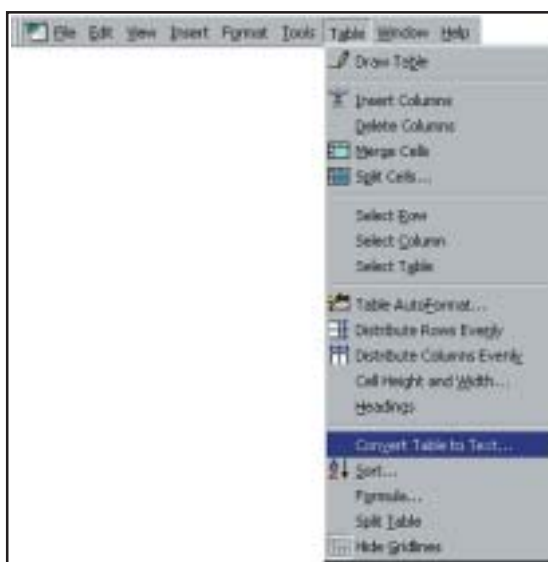


Figure 8.25 (a): Convert to text

3. Select Tabs, Commas or Other, and type a character in the text box to separate the text, as highlighted in Figure 8.25 (b). Whatever you select will separate the text in each cell. For instance, if you choose commas then each cell's contents are separated by commas.



Figure 8.25 (b): Convert to text

4. Click on the OK button to close the Convert Table To Text dialog box.

Adding Text in a Table

To enter text in a table, the steps are:

1. Position the insertion point in a cell and then type the text you want to add.
2. To move to another cell in a table, use the arrow keys.
3. Press the Tab key to move the insertion point to the right from one cell to another.

Selecting Text in a Table

Selecting text in a table is similar to selecting text in a document. You can drag the I-beam pointer over the text to select it, or click on the selection bar to select an entire row.

Editing a Table

The table's format can be changed to fit the data that is to be displayed in the table. You can add or delete rows and columns in a table as per your requirements.

Deleting Data

To delete cells, rows or columns, the steps are:

1. Select the cells to be deleted.
2. Select the Delete Cells option from the Table menu. The Delete Cells dialog box gets invoked, as displayed in the Figure 8.26.

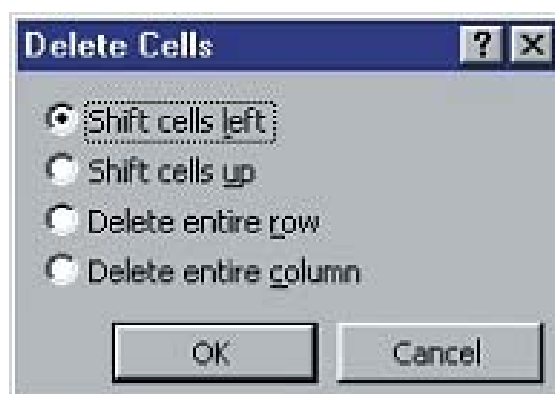


Figure 8.26: Deleting cells

3. Select one of the following options in the Delete Cells dialog box:
 - Select the Shift cells left radio button to move the cells in the row to the left of the deletion.
 - Select the Shift cells up radio button to move the cells in the column up after the deletion.
 - Select the Delete entire row radio button to delete the row that contains the selected cell.
 - Select the Delete entire column radio button to delete the column that contains the selected cell.

Inserting Rows and Columns

To insert a row in the table, follow these steps:

1. Place the insertion point in the row below where you want the new row.
2. Select the Insert rows option from the Table menu. Alternatively, right click in the row below the row where you want to insert the new row, then click on the 'Insert Rows' item on the popup menu.

Merging Cells

The 'Merge Cells' feature is used to combine the contents of multiple cells. This is a common way to make a heading in one cell for the entire table or selected group of columns as displayed in the Figure 8.27.

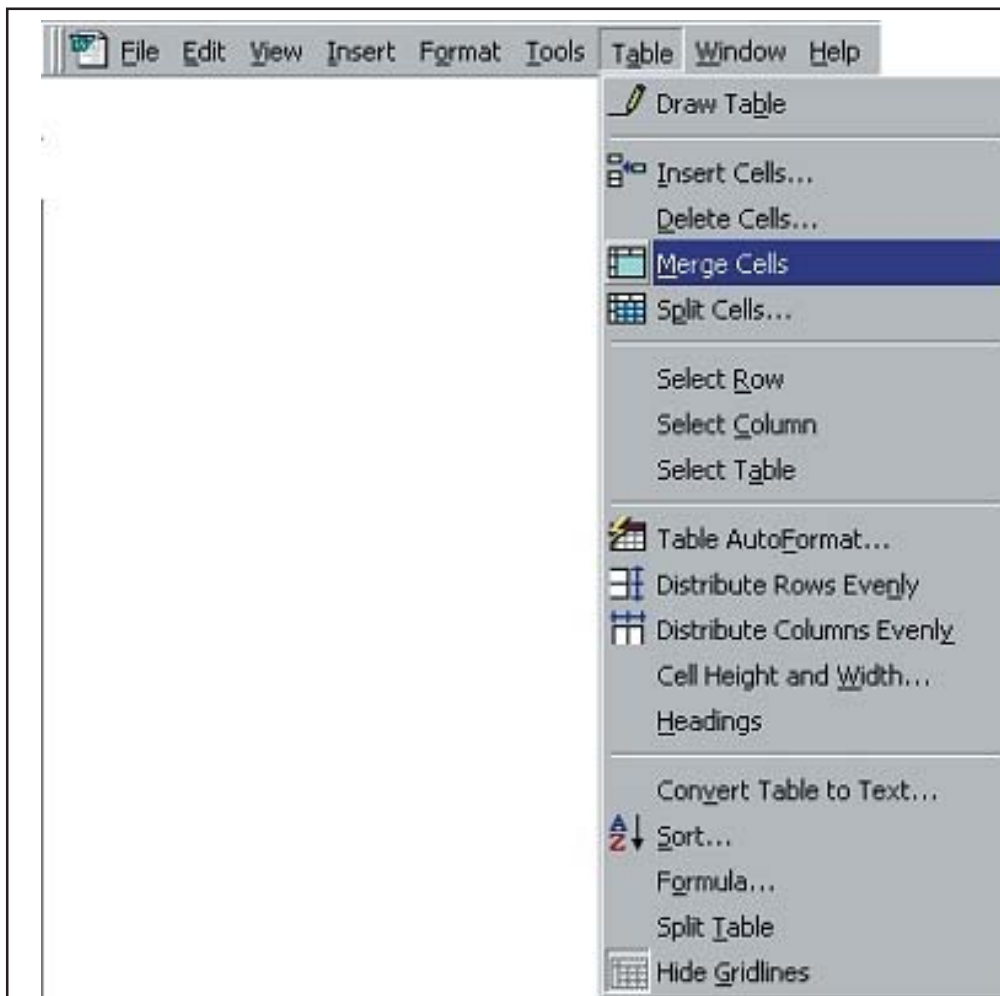


Figure 8.27: Merging cells

To do so, follow these steps:

1. Select the cells to be merge.
2. Select the Merge Table option from the Table menu. The contents of the designated cells are merged as in Figure 8.27.

Adding Borders and Shading

Word has many paragraph and border shading features. Lines can be created by using this feature. You can apply borders and shading to single paragraphs or to a group of paragraphs.

8.4 LET US SUM UP

In this Unit you learnt about the Word's 'Mail Merge' feature and then the concept of 'Tables' was introduced to you.

Both these concepts are considered to be advanced features but actually they are not as difficult as they seem as you yourself saw.

You should keep on using these features and soon you will be an expert yourself!

8.5 CHECK YOUR PROGRESS EXERCISE

1. What are the basic steps involved in Mail Merge?
.....
.....
2. Can database of another applications act a data source for mail merge in Word?
.....
.....
3. How can records be added to a data source?
.....
.....
4. How do you merge the main document and the data file in mail merge?
.....
.....
5. Can tables to converted to text, if Yes how?
.....
.....
6. What are the options in the Delete Cells dialog box?
.....
.....

7. Create the following table with some imaginary data.

Sale code	MONTHLY REPORT OF THE GARMENTS FACTORY			Status	
	PRODUCTS	QTY	SALE AMOUNT	Yearly	Y
S001			1,00,0000		
S002					
S003					
S004					
S005					
S006					
S007					Y
S008					
S009					

8.6 ANSWERS TO CHECK YOUR PROGRESS EXERCISE

Check Your Progress Exercise

- The basic steps involved in Mail merge are creating main document, specifying a data source and merging the data file and the main document
- Yes database of another applications act a data source for Mail Merge in Word.
- Records can be added to a data source by following the given steps:
 - Click on the Mail Merge helper button on the Mail Merge toolbar to invoke the Mail merge Helper dialog box.
 - Click on the Edit button in the Data source area of the Mail Merge helper dialog box. Click on the Document name.
 - Alternatively, click on the edit data source button in the MS-Word. The data from dialog box gets invoked.
 - Typed the appropriate information in the first text box and press enter to enter the information in the displayed record. Move the insertion point to the next field in the tex box click on the 'Add New' button of the Data from dialog box to add another, record and enter information for that record.
 - Select the 'View' button from the data source document.
 - Click on the save button of the standard toolbar to save the data source.
- To merge the data file and the main document, follow these steps:
 - In the main document, click on the view merged Data button on the Mail Merge toolbar. This displays the fields from the first record of the data source in the main document.
 - Click on the Mail Merge helper button on the Mail Merge toolbar to invoke the Mail Merge Helper dialog box.
 - Click on the Mail Merge helper button the Mail Merge helper dialog box. The Merge dialog box gets invoked.
 - Click on the merge to drop-down list to select any option.

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- Click on the merge button of the merge dialog box to merge the data source with the main document.
5. Yes tables can be converted to text by following these steps:
- Select the table rows that contain the text to be changed into paragraphs.
 - Select the convert table option from the table menu. A 'Convert Table to Text' dialog box is invoked.
 - Select tabs, commas or other, and type a character in the text box to separate the text.
 - Click on the OK button to close the convert table to text dialog box.
6. The options in the delete cells dialog box are to select:
- either the Shift cells left radio button to move the cells in the row to the left of the deletion, or
 - the Shift cells up radio button to move the cells in the column up after the deletion, or
 - the Delete entire row radio button to delete the row that contains the selected cell, or
 - the Delete entire column radio button to delete the column that contains the selected cell.
7. This is a practice exercise. Try doing it yourself.