Word 2000
Advanced User Manual

EBIT SOLUTIONS LIMITED

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MAIL MERGE

INTRODUCTION

The purpose of Mail Merge is to facilitate the production of bulk mailing from Word. Mail Merge produces bulk letters and labels by merging two files:

- The first file - the **Main** Document - contains the standard document whose text you wish to amalgamate with the addresses.
- The second file - the **Data** Document - contains the names and addresses.

THE MAIN (FORM) DOCUMENT

The Main (Form) document can be of any layout you wish, it is the **base** document to which you add the names and addresses of the subjects you wish to contact.

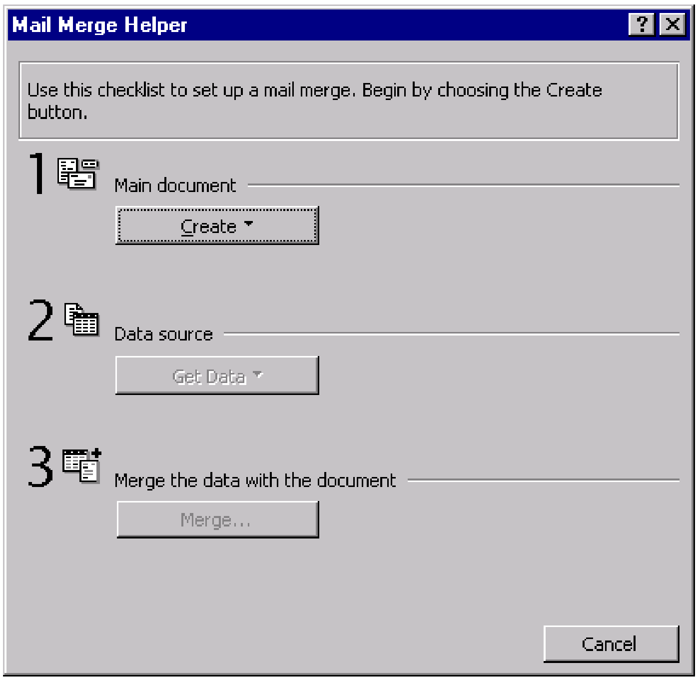
- **Create, save and name the base document,** it should contain **only the standard text** required in the letter, **no fields** are entered at this point.

A MergeLetter Macro has been created for this procedure. When using this Macro, you MUST insert a "Page Break" at the end of the text.

Remain inside the document:

- Click on "**Tools**" from the menu bar, then "**Mail Merge**"

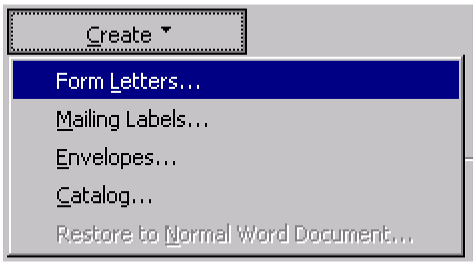
The Mail Merge Helper dialogue box will appear. This screen is designed to help you navigate through Mail Merge as effectively as possible.



The “Mail Merge Helper” is split into 3 sections dealing respectively with:

1 The Main Document
2 The Data Source
3 The Merge Process

- Under **1 - The Main Document**, click on “**Create**”



- From the menu click on “**Form Letters**”, a new display will appear.

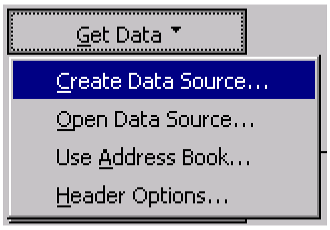
- Click on “**Active Window**” to select the document you have just created. Alternatively you can select ”New Main Document” which will open a fresh blank document if your current document is inappropriate.

The Main document is confirmed and you are returned to the “Mail Merge Helper”, you can now go on to create and access the Data (List) document.

THE DATA (LIST) DOCUMENT

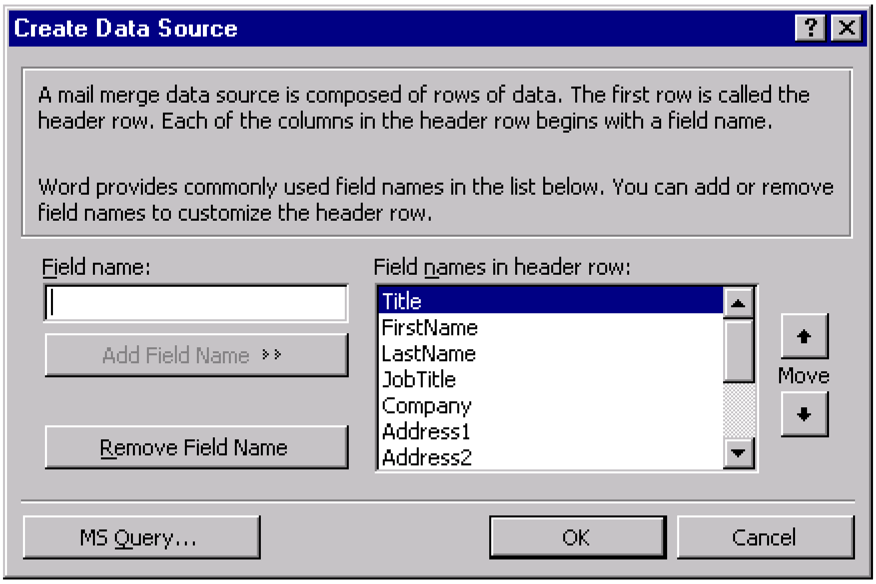
The Data (List) document contains all the relevant details of the individuals you wish to contact. There are no limits on the amount of information you can enter. It is desirable to design the document to cater for all letters and labels.

- Under “**2 Data Source**”, click on “**Get Data**”, a drop down menu will appear



- Click on “**Create Data Source**”, this initiates creation of the Data document. Alternatively, if you have previously created a Data document you can retrieve it by clicking on “Open Data Source” and finding the file from your directories.

A dialogue box will appear, displaying a list of basic field names. From the list you can customise the selection of field names you wish to hold on the Data document.



- **To Add a Field -** In the "**Field Name**" box **type the name** of the **required field**, then click on "**Add Field Name**", the name is added to the list.

- **To Remove a field** - Indicate the unnecessary field in the list, then click on the "**Remove Field Name**" button.

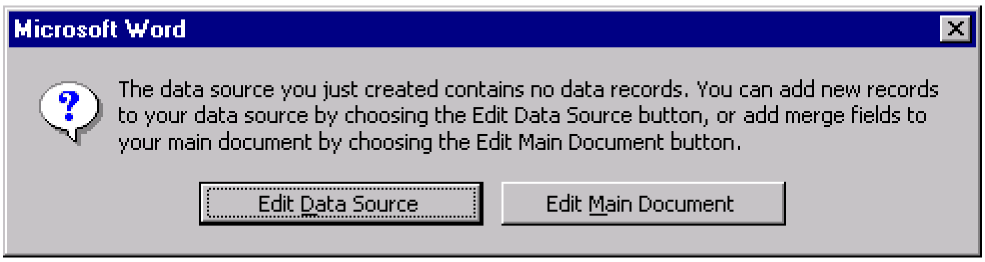
- Use the "**Move**" "**+**" and "**-**" buttons **to change the position** of the field name in the list to make it easier to follow.

- Click on "**OK**"

The save dialogue box will appear prompting you to save the **EMPTY** Data Source document, at the moment it contains **NO information only** the **field names**

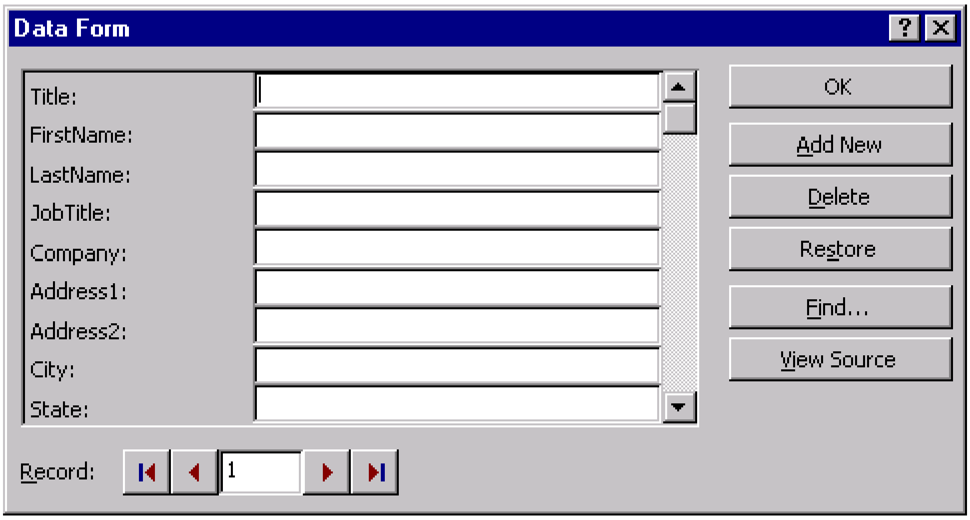
- **Name and save the document**

You are returned to Merge Helper. A pop up screen will appear, prompting you to "Edit Data Source". It is at this point that the details of the contacts are added.



- Click on "**Edit Data Source**"

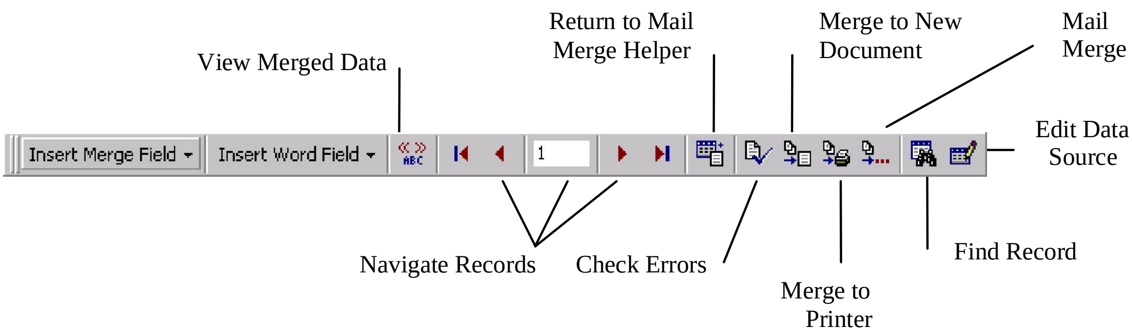
A “Data Form” screen will appear, this allows you to add information to your Data document by filling in the information relevant to each field for all of the individuals.



- Your cursor will be in the top field, after each **entry** press **[Return]**, this will drop you to the next line down.

- When you press **[Return]** on the last field a fresh set of blank details will be offered for your next entry.

Enter all the information then click on “**OK**”, you will return to the form document, the **Merge toolbar** will appear above your text.



Place the cursor in the document at the point you want the field to appear.

If you are using the “MergeLetter” Macro, insert the fields for the Title, Lastname etc **PARALLEL** to the reference in the document, then down arrow for the address.

- Click on the “**Insert Merge Field**” button. Your list of Field names will appear.

You can use this list as a fast way of inserting the Field names in the document. Remember to include any grammar or presentation details as you enter the fields, eg spaces, etc.

- Click on the **relevant field name in the list**, the field name will be inserted at the point of your cursor. You may use a field as frequently as you wish at different locations in the document. You can now progress to the Merge.

THE MERGE

Word can now go on to merge the Main document with the Data document and produce an output file of bulk mail that you can save and/or print off.

To do this you can return to the "Merge Helper" or merge straight to a new document.

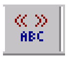
Checking The Merge Will Work

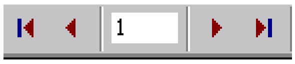
There are 2 ways of checking the Merge:

1. You can check for errors such as field name inaccuracies and then go on to simulate the Merge.

-  Click on the "**Check For Errors**" icon in the Merge toolbar, then click on "**Simulate The Merge and report errors in a new document**"

2 You can view the Merge, looking at sample records in record order.

-  Click on the "**View Merged Data**" icon.

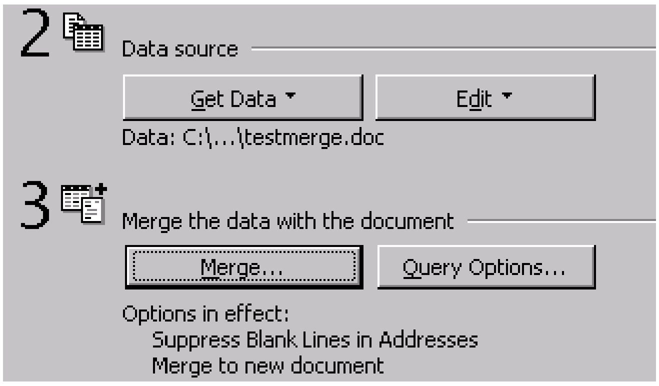
- Then use the "**Navigate Records**" icons  to scroll through and check the entries.

Merging To Create A Bulk Mail Document

You can Merge to a document by using the Mail Merge Helper or using the toolbar.

-  Click on the "**Mail Merge Helper**" icon, this will return you to the Merge Helper screen

Under "2 Data Source" the name of the "Data" document appears.

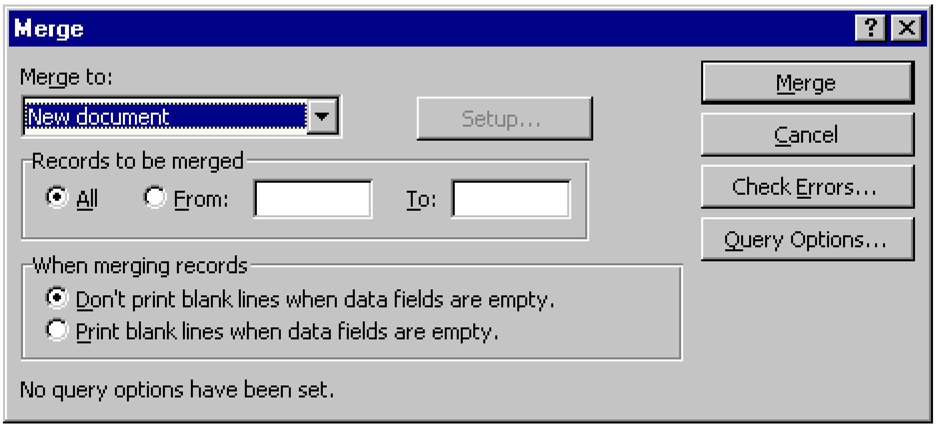


Under "3 Merge The Data With the Document", the display shows the options:

1. That any blank lines in the fields selected will not be shown
2. That the merge will produce a new document.

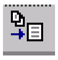
- Click on "**Merge**", the following screen will appear.

In addition to confirming the actions stated above, this area allows you to select a range of records to merge and to use the "Check Errors" button to ensure the merge will work.



- Click on "**Merge**" to finish.

Alternatively:

-  On the merge toolbar click on the "**Merge To New Document**" icon. This will take you through the screen above.

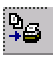
The result of either of these methods is the creation of a new Word document. The document will be called "Form Letters 1", you can name and save it if you wish or print the pages and delete the document.

The document will contain all the information from all the records selected, each record will be held in a "Section" defined by a section break. When printed, each section prints as a separate page.

If you use the **"MergeLetter" Macro** you **MUST** insert a **Page Break** at the end of the letter as the **Section paging function will NOT WORK**

Merging Straight To The Printer

This sends your Merge straight to your local printer, if there is an error in the Merge it is not possible to amend it. As a consequence, **you should only use this function if you are absolutely sure the Merge is going to work.**

-  Click on the "**Merge To Printer**" icon

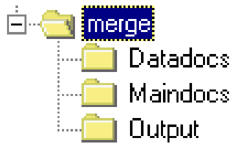
SAVING THE DOCUMENTS

At the end of the merge process you will have 3 documents open:

The “Main” document
The “Data” document
The “Form Letters” Document - this is the last one created and will be on the screen.

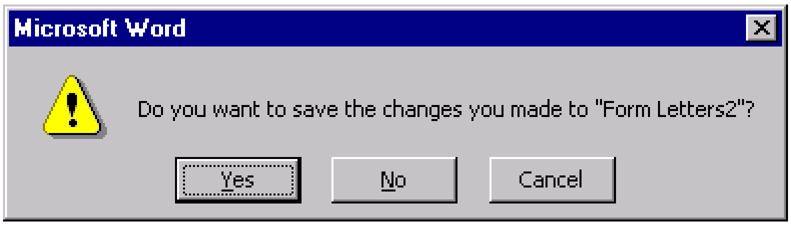
You must decide now as to what to save and what to dispose of.

It is prudent to create some suitable directories for filing documents. This will enable easy retrieval at a later stage, eg:

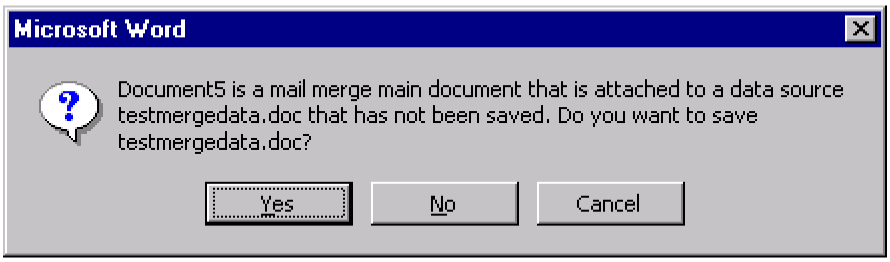


We will deal with the 3 documents in reverse order:

The “Form Letters” This document contains all the merged data and text, perhaps 150/200 letters. Consider whether you need to keep it at **all**, as long as you have the “Main” and “Data” documents you can always merge again, it takes seconds.



The Data Document When you name and save the Data document in the initial stages of the merge, the Data document has **no information, ALL you have saved so far is the names of the Data fields**. As a consequence, when you attempt to close the “Main” document you will get this prompt:



- Click on “**Yes**” to **save** the **information you have entered against the fields**

The “Main” Doc It is prudent to name and save the “Main” document, if only temporarily, in case you get extra individuals to mail to, or if an error is made. At a later stage you can create a new document using the same name and overwrite the old text.

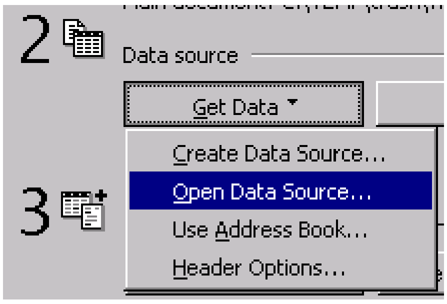
From now on the “Main” document is **ATTACHED** to the “Data” document, each time you open the “Main” document and follow the merge, it will automatically present you with that “Data” file unless you choose otherwise.

ACCESSING PREVIOUSLY HELD DATA

Once you have created a Data Source document, there will be times when you wish to use it again. Alternatively, you may have received data from another source and wish to access it from your directories. There are several methods of performing these functions, we will cover the most straightforward options.

Accessing The Data Document For A New Main Document

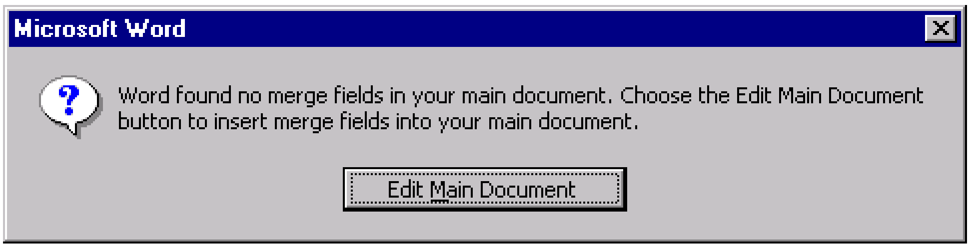
- Open a new “**Main**” document, create the text (use the MergeLetter macro) and enter the “Mail Merge Helper”. Look under section “**2 Data Source**”.



- Click on “**Get Data**”
- Click on “**Open Data Source**”
- A **dialogue box** will appear, select the **data document file -** to combine with your Main document - from **your directories,** then click on “**OK**”.

The information contained in the “Data” document is accessed without OPENING the document on screen, you will not see the information.

Word will recognise that there are no data fields in your Main document to merge the information into. You will flick past the Mail Merge Helper and will be prompted with the following screen:



- Click on “**Edit Main Document**”

You can now insert your fields in the “Main” document and, assuming the data needs no changes or upgrades, you can progress straight to the merge using the icons on the toolbar and option “3 - Merge the Data with the Document”.

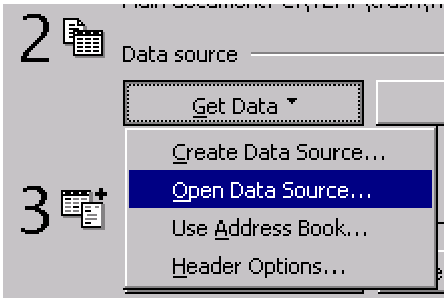
EDITING PREVIOUSLY HELD DATA

Once you have created a Data Source document, or received Data from another source, you will find the Data will be subject to a lot of changes. Data documents held for merging will therefore, frequently need updating, by adding extra fields and records or deleting unnecessary information.

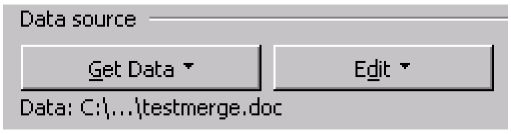
Accessing The Data Document Via The Main Document

- Open an old or new "**Main**" document.
- Access "**Mail Merge Helper**"

Section "**2 Data Source**" will display the following options:.



- Click on "**Get Data**"
- Click on "**Open Data Source**"
- A **dialogue box** will appear, select the **data document file** from **your directories** to combine with your Main document. When you click on "**OK**" the file name will show under "**Get Data**"



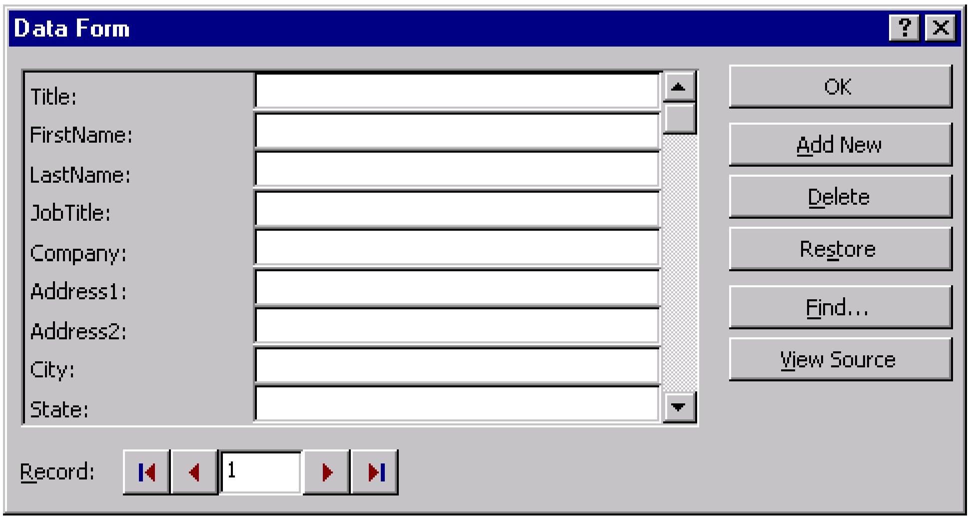
The button next to "Get Data" shows the word "Edit"

- Click on "**Edit**", the file name will appear under the "Edit" button

- Click on the "**file name**"

You will enter the Data document.

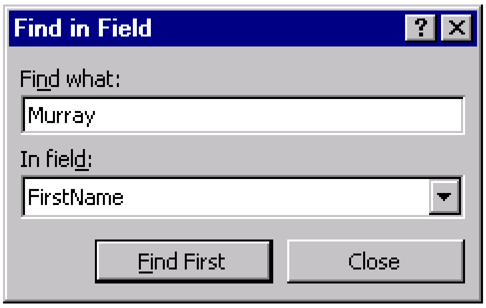
The Data Form Dialogue box will appear on the screen. It will display the first record.



You can use the buttons on the right hand side to edit the Data document:

Add New Will let you to **add another full record** to your Data document by presenting you with a blank record to complete with new information.

Find Will let you to **look for a particular record to edit** by selecting the particular piece of text and the field it will appear in. See example



Restore Will restore a record's **original details** if changes are made in error.

Delete Will **delete** the **full record** displayed at the time.

View Source Allows you to add additional fields to all the records and edit current records by taking you into the **set up** of the Data document. See the following section "Adding Extra Fields And Editing A Data Document"

Adding Extra Fields And Editing A Data Document

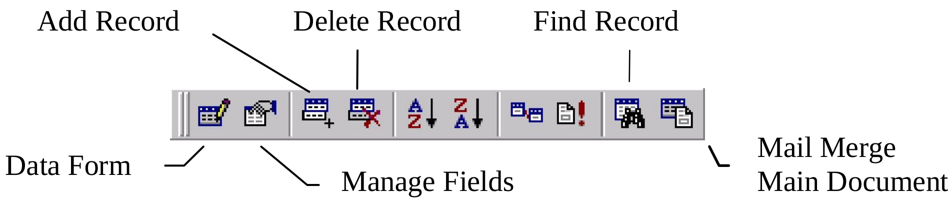
- Click on the "**View Source**" button.

You will enter the Data document, the data is displayed in a table, and this table can be edited in the same way you would change a table in a standard text document.

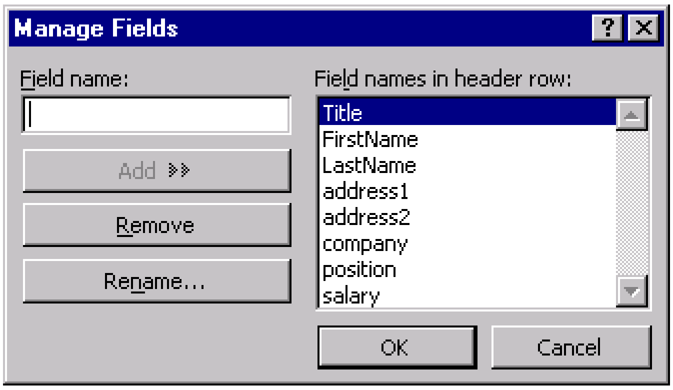
Title	FirstName	LastName	address1	address2	company	position	salary
Mr	Gordon	Daniels	24 Trent Street	London	Linkline	Driver	26,000
Miss	Katie	Hardy	54 Bean Road	Glasgow	Countup	Accountant	32,000
Mr	Jeff	Green	476 Rally Ave	Leeds	Runtime	Programmer	55,000

The top row of the table is in bold and is called the “**Header Row**”, it holds the “**Field Names**” for your records.

Additionally, at the top of your document you will acquire a new “**Database Toolbar”**. This toolbar allows all the functions of the Data form, plus that of Managing Fields.



-  Click on the “**Manage Fields**” icon, a dialogue box will appear



To Add New Fields And Information

- Enter the **name of the new Field** in the “Field Name” box then click on “**Add**” **Repeat** this for **each** extra **field** then click on “**OK**”

The new fields will be added into the header row at the right hand side of the table, you can now add the relevant information against each record.

- Click on the “**Data Form**” icon

The data form dialogue box will appear, at the bottom of each record there will be blanks against the new fields.

- Press **[Return]** through each field on the record till you are at the blank field, then enter the relevant information. Keep pressing **[Return]** to continue to the next record.

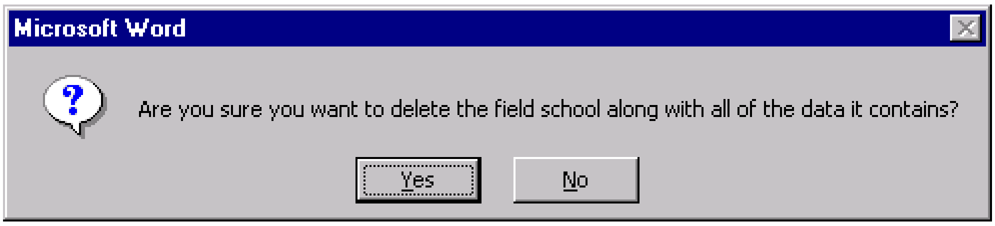
Alternatively, on small data documents, you can simply edit the table by down arrowing through the columns created with the extra fields and entering the details.

To Delete Fields And Information

You can delete a field and **all** the data contained in that field for every record.

- In the "**Manage Fields**" dialogue box, from the "**Field Name in Header Row**" list **click on the field name you wish to delete**.

- Then click on "**Remove**", a prompt will appear with a warning message



- Click on "**Yes**" to remove both the field name and **ALL** the information.

To Rename Fields

- In the "Manage Fields" dialogue box, from the "Field Name in Header Row" list **click on the field name you wish to Rename**.

- Then click on "**Rename**", the following box will appear:

- **Type** in the **new name** then click on "**OK**"

To Return To The Main Document

-  Click on the "**Mail Merge Main Document**" icon

You are back in the Main document, and can continue with the Merge. The Merge will contain all additional information recently included in the Data document.

Accessing the Data document via "View Source" opens the document fully.

As a result, if you make alterations or additions you MUST save the changes, either by using the Save options or on exit. The document may be one of two or three that are open in Word, so, as you close each one down READ THE PROMPTS CAREFULLY to ensure you save changes to the Data document.

CREATING LABELS

Within Merge it is possible to create Labels usually for address or name tag purposes. The procedure is much the same as for a general merge.

The Main (Form) Document

- Open a **blank document** - text is not required - and remain inside it.

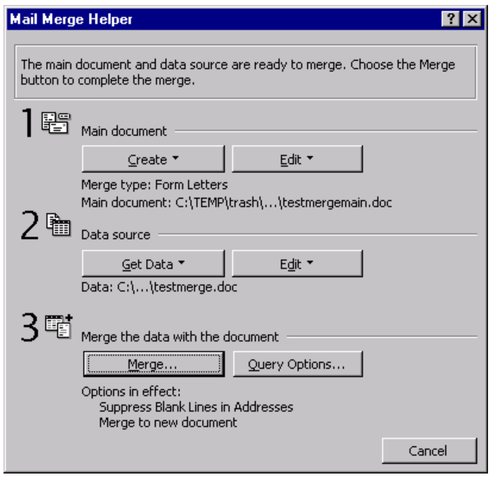
You now have to change the page margins in order to ensure you have the maximum area of the page available for the labels.

- Click on "**File**" in the menu bar then click on "**Page Setup**"
- Inside Page Setup click on "**Margins**". Set **ALL** the **margins**: top, bottom, left and right to "**0**". Then click on "**OK**" to confirm the settings.

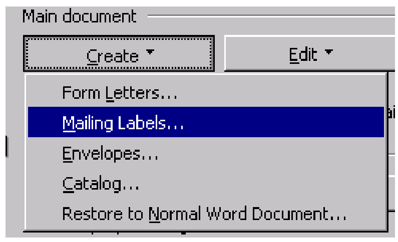
You will be returned to the blank document and can now continue with the merge.

- Click on "**Tools**" from the menu bar, then "**Mail Merge**"

The Mail Merge Helper dialogue box appears.



- Under **1 - The Main Document**, click on "**Create**", a menu will appear:
- Click on "**Mailing Labels**",

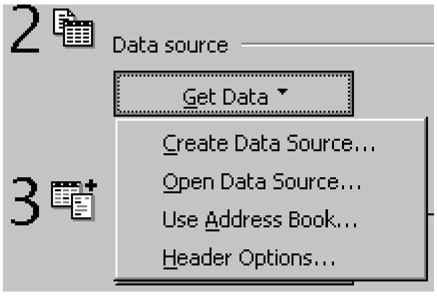


- A new display will appear. Click on “**Active Window**”

The Main document is confirmed and you return to “Mail Merge Helper”, you can now go on to create or access the Data (List) document and set up the label format.

The Data (List) Document

- From **2 - Data Source**, click on “**Get Data**”, a drop down menu will appear:

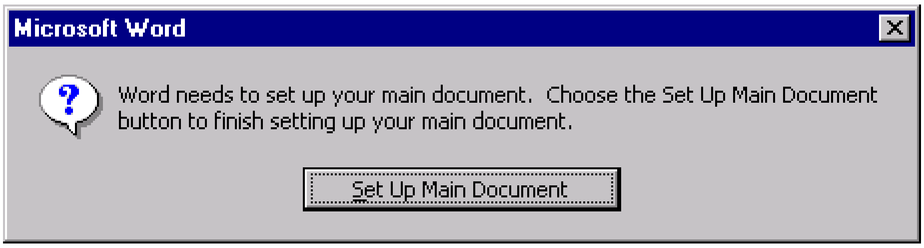


- Click on “**Create Data Source**”, to set up a new Data source. To do this, follow the instructions as per “**THE DATA (LIST) DOCUMENT**” at the start of the section on Merge.

or

- If you have previously created a Data document, retrieve it by clicking on “**Open Data Source**” and finding the file from your directories.

Word will recognise that there are no data fields in your Main document to merge the information into. You will be prompted with the following screen:

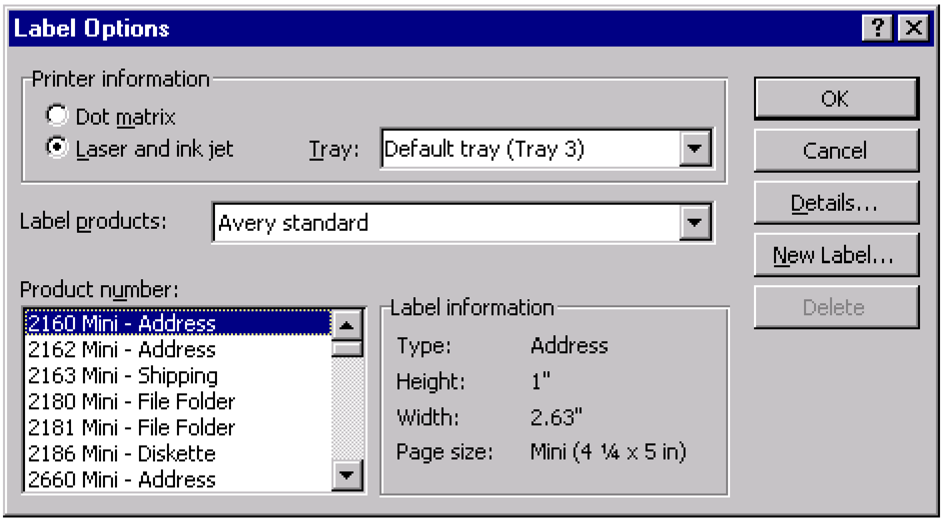


- Click on “**Set Up Main Document**”

This will take you into the “**Label Options**” dialogue box:

Setting The Label Size

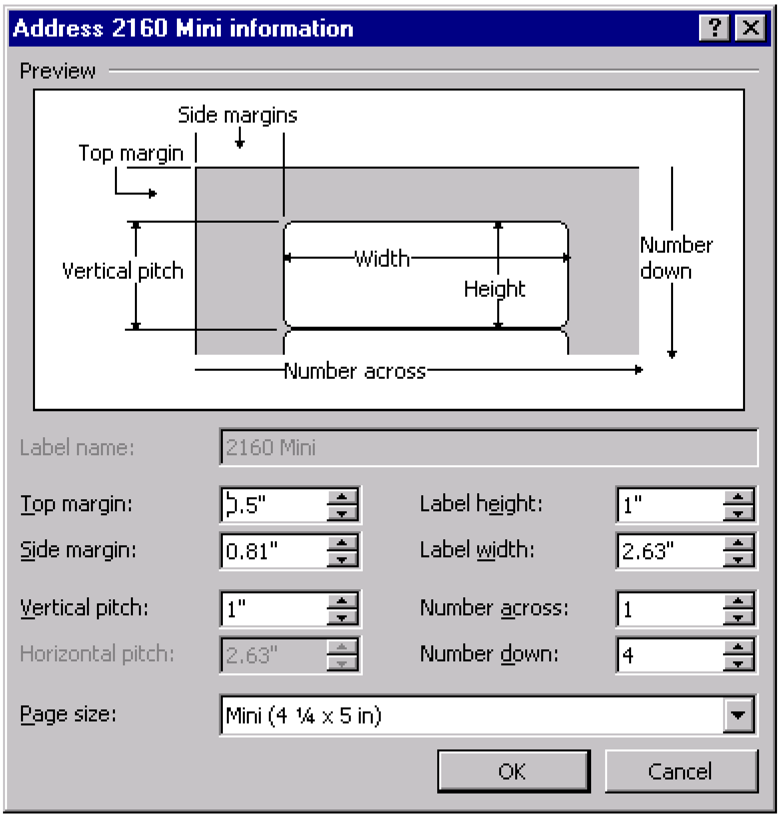
The principal function of the “**Label Options**” dialogue box is to set the label size.



On the left side of the dialogue box is a list area called "Product Number" containing the descriptions of types of labels, beside it is the "Label Information" area, this displays the measurements for the highlighted label type.

The labels used by the Group are NON STANDARD, you have to set the label size. Once set, you do not have to change the details unless your stationery changes. I have given some sample settings for standard **Dudley Labels** in the diagram below.

- Click on "**Custom Laser**", to set up your own label size.
- Click on the "**Details**" button, the following screen will appear



Use a ruler to measure:

- The **Height** and **Width** of the labels
- The **distance** of the 1st label from the **left** side of the paper
- The **distance** of the 1st label from the **top** of the paper
- The **Horizontal and Vertical Pitch** - the **height** and **width** of the Label **plus the gap** - if any - **between the labels**.

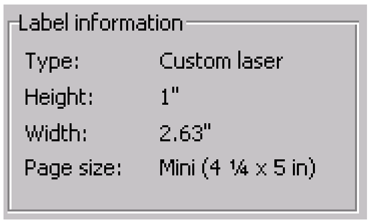
- Lastly, determine and enter **how many labels** fit across and down the page

- Enter a **Label Name** for your custom size label

- Click on "**OK**"

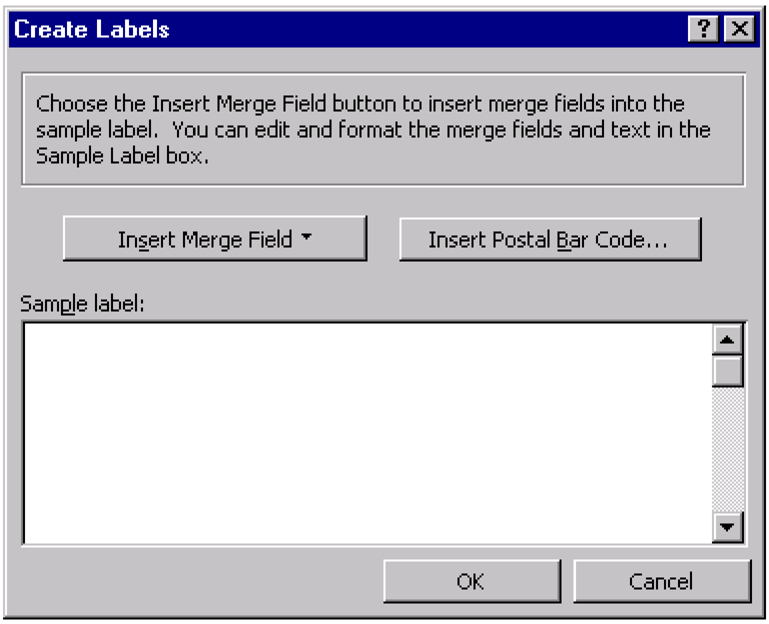
You will return to the "Label Options" dialogue box.
The settings for the Label measurements in the "Label Information" area will upgrade to show the changes made to the settings for the "Custom" labels.

Eg, our standard label size will be similar to this:



- Click on "**OK**"

You will flick past the "Mail Merge Helper" and into the "Create Labels" screen, your cursor will be at the top of the "Sample Label" area.



- Click on the "**Insert Merge Field**" button, your list of Field names will appear.

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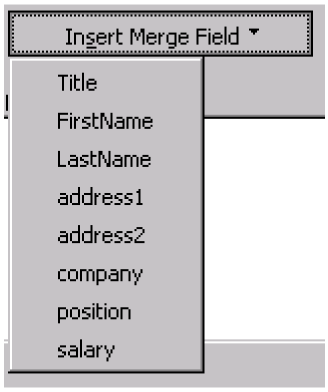


- Click on the **field name in the list**, it will be inserted at the point of your cursor. You may use a field more than once, include any text, grammar and presentation as you enter the fields, eg spaces.
- Repeat this procedure until all the **required fields are entered**

At this point you need to consider whether formatting, eg bold, point size changes, centring etc is required in the labels.

Formatting Fields in The Label

Any presentation attached to the fields is reflected in the text produced on the labels. Consequently if a field is bolded then in all the labels the text produced by that field will appear in bold. However, **formatting the fields - and therefore the text produced - using the TOOLBARS is not possible in the "Sample Label" area**.

The fields can be formatted using two methods, the first method is recommended:

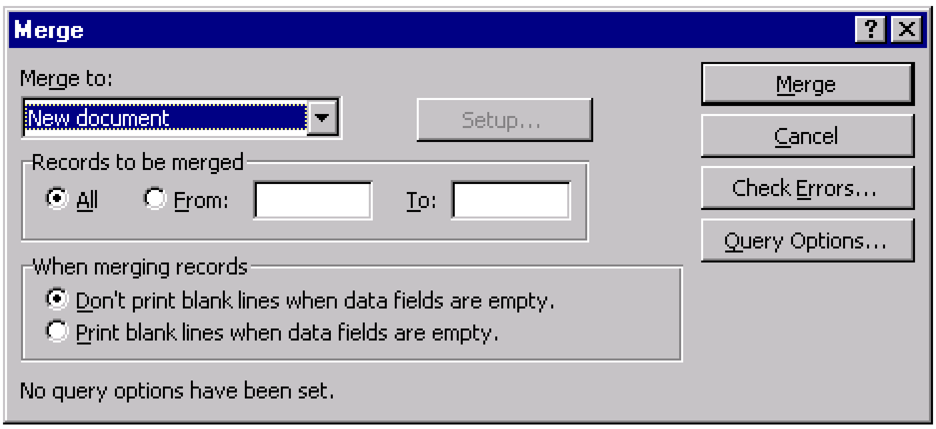
- Using the **menu under the OTHER Mouse key** - the shortcut menu - all formatting including centring, indenting, bolding and point size changes to the fields can be actioned using the "**Paragraph**" and "**Font**" functions

Add the **required formatting.**

- Click on "**OK**"

You will be returned to Mail Merge Helper and can proceed to the Merge

- Click on "**Merge**", the following screen will appear



- Click on “**Merge**” again

The documents will merge. The result is displayed on screen as a “Labels” document. The labels are complete and ready to print off.
If necessary, they can be manually changed as in a normal document. There are some limitations, as each label is treated as a separate document. In some cases it may be necessary to do the merge again to include specific aspects, eg spare lines above or inside the text.

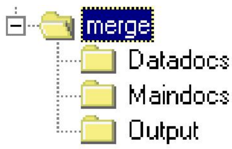
SAVING THE LABEL DOCUMENTS

At the end of the merge process you will have 3 documents open:

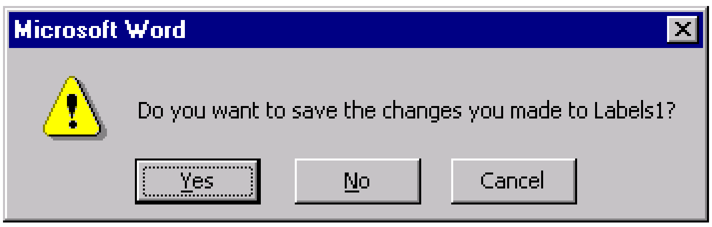
The “Main” document - Label format
The “Data” document
The “Labels” Document - this is the last one created and will be on the screen.

You must decide what to save and what to dispose of.

It is prudent to create some suitable directories for filing documents. This will enable easy retrieval at a later stage, eg:

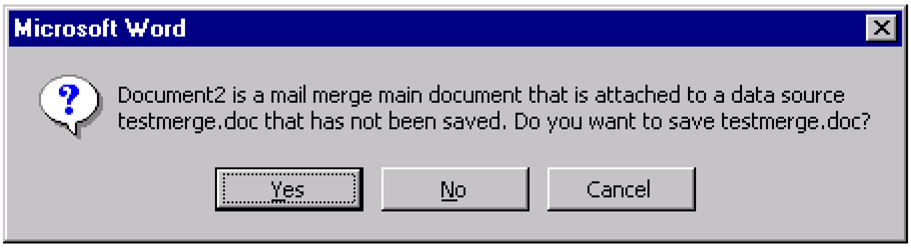


The “Labels” Doc This document contains all the merged data, perhaps 200 labels. Consider whether you need to keep it at **all**, you can always merge again, it takes seconds.



The "Data" Doc If you used an **old Data** document **and made changes** to it, then ensure you **save the changes** at least **on exit**

If you created a NEW Data document and saved it in the initial stages of the merge then **ALL you have saved so far is the names of the Data fields**, the Data document has no information. As a consequence, when you **attempt to close the "Main" document you will get this prompt:**



- Click on "**Yes**" to save the information you have entered against the fields

The "Main" Doc **This is a template for Labels**. It is prudent to name and save the "Main" document for future use. Once set up you will not need to change it unless your stationary alters.

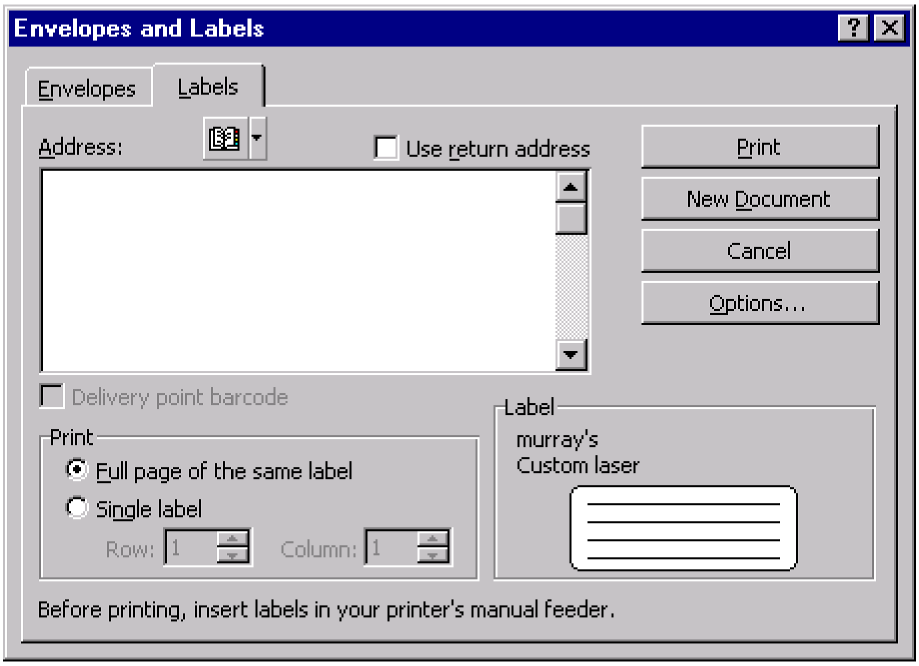
From now on the "**Main**" document is **ATTACHED** to the "**Data**" document, each time you open the "Main" document and follow the merge, it will automatically present you with that "Data" file unless you choose otherwise.

CREATING A PAGE OF THE SAME LABEL

If a set of labels is required for posting to a single address, Word has the facility to print the same address - or information - for a full page of labels. You will need to have set your page dimensions and label size as per the previous section.

You do not have to be in a blank document to perform this function

- Click on "**Tools**" then click on "**Envelopes and Labels**"
- If the Label display is not at the front, click on "**Labels**" to bring it forward



- **Type the address** in the blank area of the screen.
- Ensure that "**Full Page of the Same Label**" is selected (bottom left side)

If you have not set the label size, go into "Options" and set the size as described in "Setting The Label Size" in the previous section .

- Click on "**New Document**".

A full page of labels will appear on screen, it is displayed as a new document showing your text repeated for the requisite number of labels on the page.

To adjust the presentation of the labels

- Click on "**Edit**", then click on "**Select All**" to highlight the whole document
- **Add** any **formatting** required.

You can now print the labels.

CREATING LISTS AND REPORTS

From the data document, it is possible to create lists of information and reports. Additionally, using the Select and Sort functions - discussed in the next chapter - specific information can be extracted.

This is performed using the “Catalog” function. The “Catalog” function prints the information from the requested fields, for every record selected, as a list. Text can be included but will be printed and repeated for EACH record on the list.

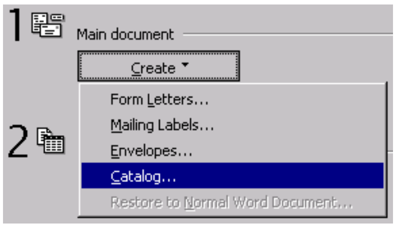
The Main Document

- Create a **document** holding the text required for EACH record of your list, eg:

Stationary Supplier Quantity Cost Telephone

Do **NOT** set up tiles, page breaks, headers or footers as these will also repeat.

- Click on “**Tools**” and “**Mail Merge**”, the “Mail Merge Helper” screen will appear
- Under **1 - The Main Document**, click on “**Create**”, a menu will appear:

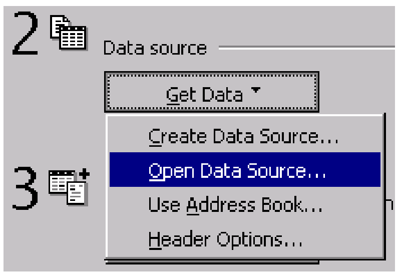


- Click on “**Catalog**”,
- A new display will appear. Click on “**Active Window**”

The Main document is confirmed and you return to “Mail Merge Helper”, you can now go on to create or access the Data (List) document.

The Data (List) Document

- From **2 - Data Source**, click on “**Get Data**”, a drop down menu will appear:

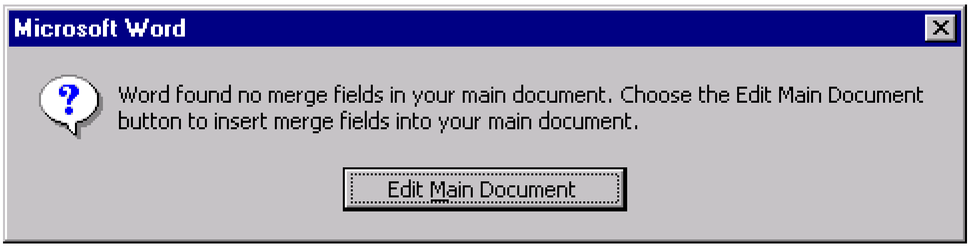


- If you have previously created a Data document, retrieve it by clicking on “**Open Data Source**” and finding the file from your directories.

or

- To set up a new data source, click on “**Create Data Source**” and then follow the instructions as per **THE DATA (LIST) DOCUMENT** at the start of Merge.

Word will recognise that there are no data fields in your Main document to merge the information into. You will be prompted with the following screen:



- Click on “**Edit Main Document**”

You will return to the form document, the **Merge toolbar** will show. Place the cursor in the document at the point you want the field to appear.

- Click on the “**Insert Merge Field**” button. Your list of Field names will appear.

- Click on the **relevant field name in the list**, the field name will be inserted at the point of the cursor.

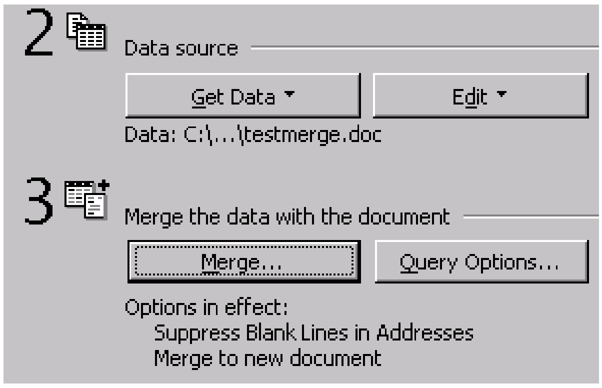
Title	FirsrName	LastName	Company	Position	Salary
<<Title>>	<<FirstName>>	<<LastName>>	<<Company>>	<<Position>>	<<salary>>

You can use a field more than once in the document. As you enter the fields, include presentation and grammar, eg spaces, etc. You can now progress to the Merge.

Merging To Create A Document

You can Merge using the “Mail Merge Helper” or the “Merge To New Document” icon.

- Click on the “**Mail Merge Helper**” icon, this will return you to the Merge Helper screen

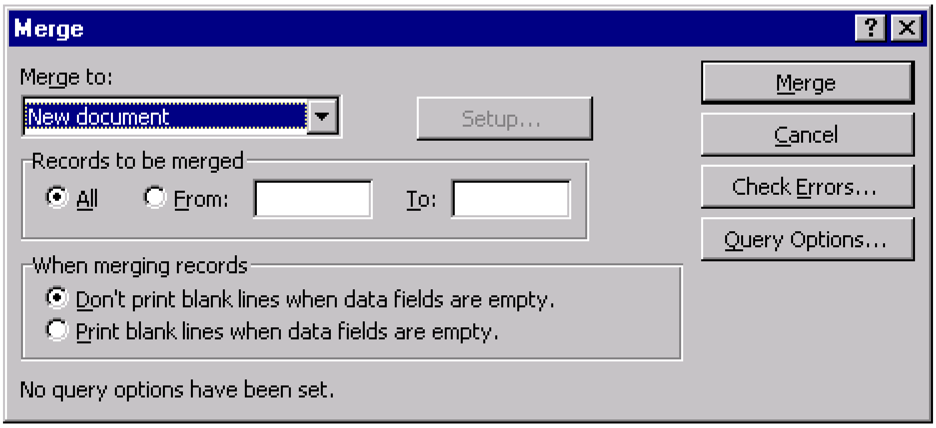


Under "**2 Data Source"** the name of the "Data" document appears.

Under "**3 Merge The Data With the Document**", the display shows the options:

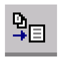
1. That any blank lines in the fields selected will not be shown
2. That the merge will produce a new document.

- Click on "**Merge**", a screen will appear, in addition to confirming the actions stated above, this area allows you to select a range of records to merge.



Alternatively:

- On the merge toolbar click on the "**Merge To New Document**" icon This will take you directly to the screen above.



- In both circumstances, click on "**Merge**" to finish.

Both these methods result in the creation of a new document called "Catalog1", you can name and save it, or print the pages and delete the document. The document will contain all the information from all the records selected plus any text in the main document repeated for each record.

Title	FirstName	LastName	company	position	salary
Mr	Gordon	Daniels	Linkline	Driver	26,000
Title	FirstName	LastName	company	position	salary
Miss	Katie	Hardy	Countup	Accountant	32,000
Title	FirstName	LastName	company	position	salary
Mr	Jeff	Green	Runtime	Programmer	55,000

Once the information has appeared you can format it as you would normal text, add titles, headers/footers, page breaks etc and turn it into a recognisable document. Using the "Query Options" (see next chapter) you can choose specific criteria and also sort your list/report into alphabetical order.

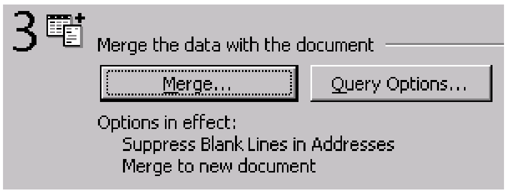
Each time the Catalog merge is repeated you will lose the presentation. Therefore, if this report/list is to be produced frequently, it is more practical to use 2 documents:

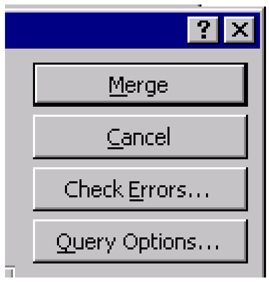
- Create a permanent document containing the presentation
- Produce the merge output "Catalog1" document then paste the contents of the merge output into the presentation document, deleting old information.

SORT AND SELECT - ACCESSING THE QUERY OPTIONS IN MERGE

You can use the Sort function in Merge to arrange your letter or label records in alphabetical or numerical order, whilst the Select function is used to merge specific groups of records - such as people in the same postal area or the same surname.

Both functions are performed using the “Query Options” at the end of Merge.



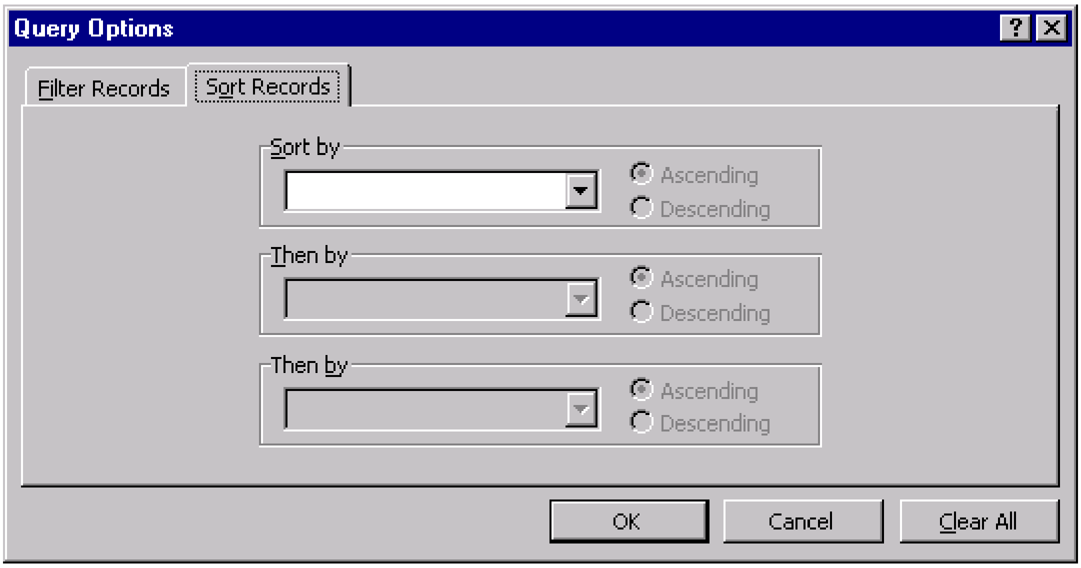


- In either screen, click on “**Query Options**” to set the Sort or Select functions.

SORT

You can use “**Sort Records**” to arrange the output in alphabetical or numerical order either by a single field or by multiple fields.

- Click on “**Sort Records**” to bring the option forward, the screen looks like this:



- Click on the **down arrow** next to the “**Sort By**” field, a menu will appear.
- Click on the **first fieldname** you wish to sort by, eg “Surname”, Then select “**Ascending**” or “**Descending**” - usually ascending order (A⇑Z).

To sort by a second field within the first eg, by firstname or initial within surname.

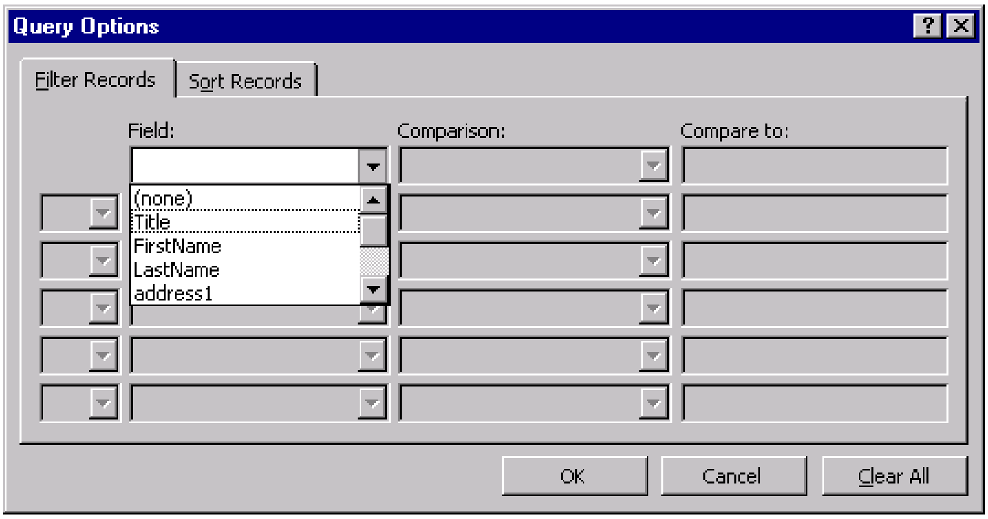
- Click on the **down arrow** next to the upper “**Then By**” field and from the menu **select the second field**, repeat this action at the lower “Then By” prompt if you wish further refinement of the output by a third field.

The selection will remain set for future merges with this document. Should you wish to change it, simply reset the fields or use the "Clear All" button to empty all the fields.

SELECT

You can use the "Filter Records" to restrict or "Filter" your merge records to selected groups of individuals using fields such as surname, postal area, age, sex etc.

- Click on the "**Filter Records**" option to bring it to the front - if necessary



- Click on the **down arrow** under **Field** and select the first **fieldname** to "Filter" by from the menu.

- Click on the **down arrow** under **Comparison** and **select a statement from the menu**.

"**Equal to**" will produce a merge where a letter or number in a field EXACTLY match a criteria.

"**Not Equal To**" will produce a merge where a letter or number in a field do NOT match a criteria.

"**Less Than**" will produce a merge where a letter or number in a field is less than the criteria, eg: less than 25 or less than L. This will produce a merge in which the age is less than 25 or where the surname begins with a letter before L in the alphabet.

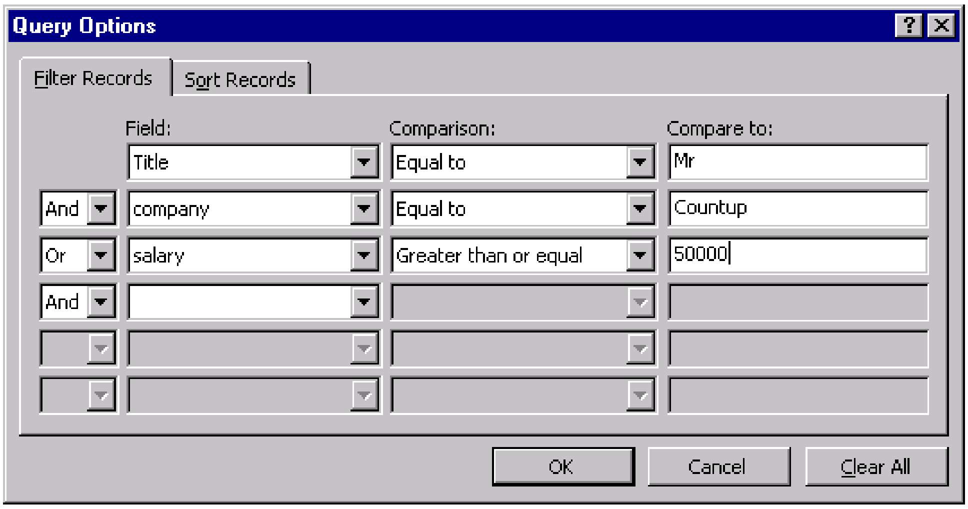
"**Greater Than**" will produce a merge where a letter or number in a field is larger than the criteria, eg: greater than 25 or L. This will produce a merge in which the age is larger than 25 or where the surname begins with a letter after L in the alphabet.

There are a further four other options not described here, as the name of each option is self-explanatory.

- Lastly, in the “Compare To” box, **type in the text** against which you wish to compare or filter the merge.

Using Select For More Than One Criteria

You can select records by defining fields that meet two or more criteria, or records that meet one of several criteria. This is achieved using "**And**" or "**Or**" options for additional field comparisons.



And is used to select records that meet two or more criteria

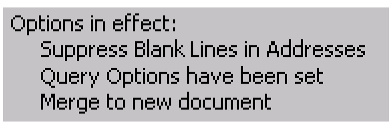
Or is used to select records that meet either one criteria OR another:

You can have multiple **And** or **Or** options for each merge.

- Click on the **down arrow** on the left hand side of the screen to select the “**And**” or “**Or**” command.

- **Repeat** the process described above **for each criteria**, then click on “**OK**”

You will be returned to the merge screen and the following text will be displayed at the bottom:



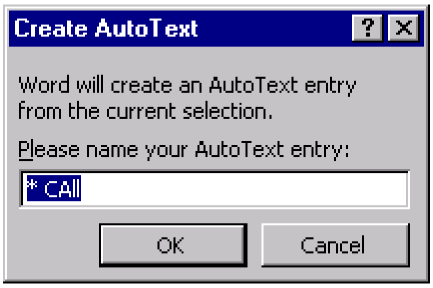
Go on to complete the merge, the information in the output documents will be limited to the criteria selected under the “And” or “Or” options.

AUTOTEXT

The AutoText facility allows you to store chunks of frequently used text and then recall it into any document. This facility includes storing tables and graphics.

STORING AUTOTEXT

- In a document, **create the text**, table or graphic you wish **to store**
- **Select** or highlight the **area of text**
- Click on "**Insert**" in the menu bar, click on "**AutoText**" then "**Autotext**" again, the following dialogue box will appear:



A default name for the selected text appears in the "Name" box, usually composed of the first 2 or 3 words of the text. If inappropriate, it can be amended to a more suitable name by overtyping.

- Assuming all is correct click on "**OK**", you will return to the document.

The text is now stored, indefinitely, under that name

INSERTING AN AUTOTEXT ENTRY IN YOUR DOCUMENT

- Position the **cursor** where you **wish the text to appear**.
- Click on "**Insert**" then click on "**AutoText**" twice
- From the list, click on the **name** of the piece **of text** you wish to insert
- Click on "**Insert**"

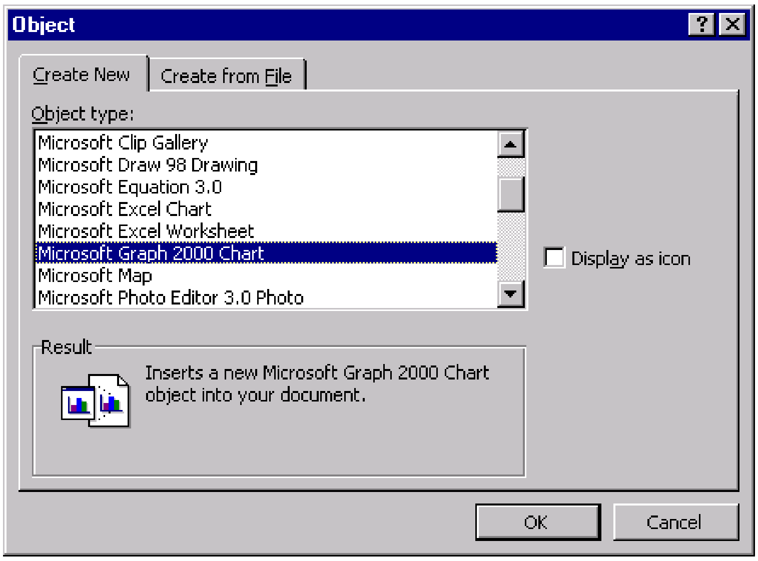
The text will appear in the document at the point of the cursor, once in the document it becomes normal text and can be changed or amended as required.

CREATING CHARTS FROM TABLES

In many cases it is much easier to create Graphs or Charts from information set up in a Word table rather than from imported Excel spreadsheets.

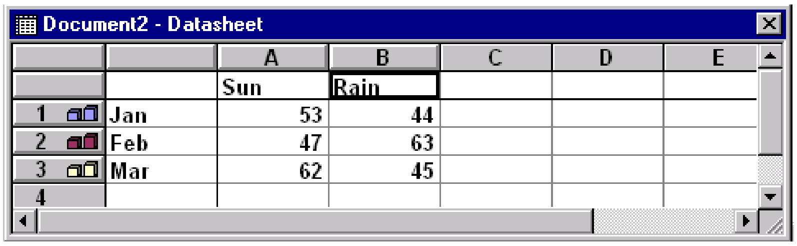
It is **desirable** when using this function to have an **understanding** of **Excel.**

- Access or create the table, then **select the area** on which to **base the chart**.
- Click on “**Insert**” then click on “**Object**”

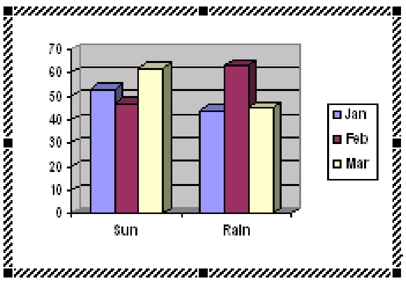


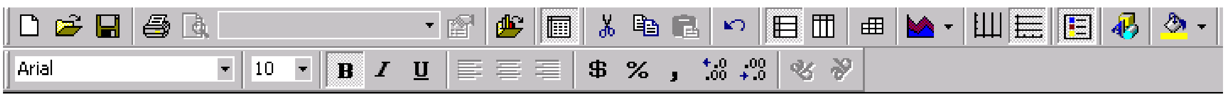
- From the list under the “**Create New**” tab, click on “**Microsoft Graph 2000 Chart**”.

The following will appear. It displays the selected information as a datasheet and offers sample chart based on that data. The Graph area works like Excel. You can change the chart style use the **Toolbar** to make formatting changes.


Document2 - Datasheet

		A	B	C	D	E
		Sun	Rain			
1	Jan	53	44			
2	Feb	47	63			
3	Mar	62	45			
4						





TO INSERT THE CHART

- Click on **any blank area of the page**

The Chart will appear in the document at the location of the cursor. The chart is a Word "Object", it is "activated" by a single click. When "active" it will acquire a border with Handles, by dragging these Handles - when the cursor is a double headed black arrow as in Excel - the chart can be re-sized. To re-position the chart use the **[Tab]** and **[Return]** keys, or drag it as you would a piece of text.

TO GO BACK INTO THE CHART

- **Double click** on the chart area

You will re-enter the Microsoft Graph function and can make any changes you wish.

TO EDIT OR AMEND THE DATA

- Click on the "**Datasheet**" window area and **insert new, or amend old information**, the chart will upgraded when you exit the datasheet view.

- **Or** return to your **document**, **amend the table and redo the chart** as above

Data amended in the Datasheet area will NOT UPGRADE into the table in your document. It will be necessary to change the table on your return to the document if you wish it to reflect the chart you are producing.

TO REMOVE THE CHART

- Click on the **chart** to activate it then press **[Delete]**

CREATING A CHART IN THE ABSENCE OF TABLE TEXT

You do not have to have a table to create a chart, data can be created and used from inside Microsoft Graph eliminating the need for table text - or the "working out" - to appear in the document.

Position the cursor and open Microsoft Graph as described above. It will show a sample datasheet and chart. Amend the datasheet to show your details, the chart will change to represent the new information.

BRINGING EXCEL INTO WORD

GENERAL

Word documents have the capacity to incorporate Excel spreadsheet information. This is effected several ways, the level of flexibility varying with each method to the point where, a spreadsheet can be imported into the document "Live", with the ability to upgrade the information in Word as changes are made to the original in Excel.

It is very **IMPORTANT** to ensure that when using these functions you have a **FULL understanding** of the principals of both **Excel** and **Word**

COPY AND PASTE

This is the simplest method of incorporating spreadsheet details, involving a normal "Copy" and "Paste" procedure from an already created Excel spreadsheet.

- Open **Excel**, then **open or create** the relevant **spreadsheet**
- In the spreadsheet, **highlight the area** to be added to your Word document.
- Click on "**Edit**" then click on "**Copy**", or use the "**Copy**" **icon**
- **Return to Word** and **place the cursor in the document** at the location you wish the spreadsheet details to appear,
- Click on "**Edit**" then "**Paste**" or the "**Paste**" **icon**

The spreadsheet are will appear in the Word document as normal "Table" text, it can be manipulated using the "Table" commands. In addition, as table text, you can use it to create charts using "Microsoft Graph" without further involvement with the Excel programme - see the previous chapter "Creating Charts From Tables".

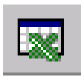
Note: If you copy and paste the spreadsheet into Word again, any formatting performed on the previous text in Word will be lost and the Excel format re-imposed.

Word tables can be copied and pasted across **to Excel** where they will adopt the set up of, and can be used as, **a full spreadsheet**.

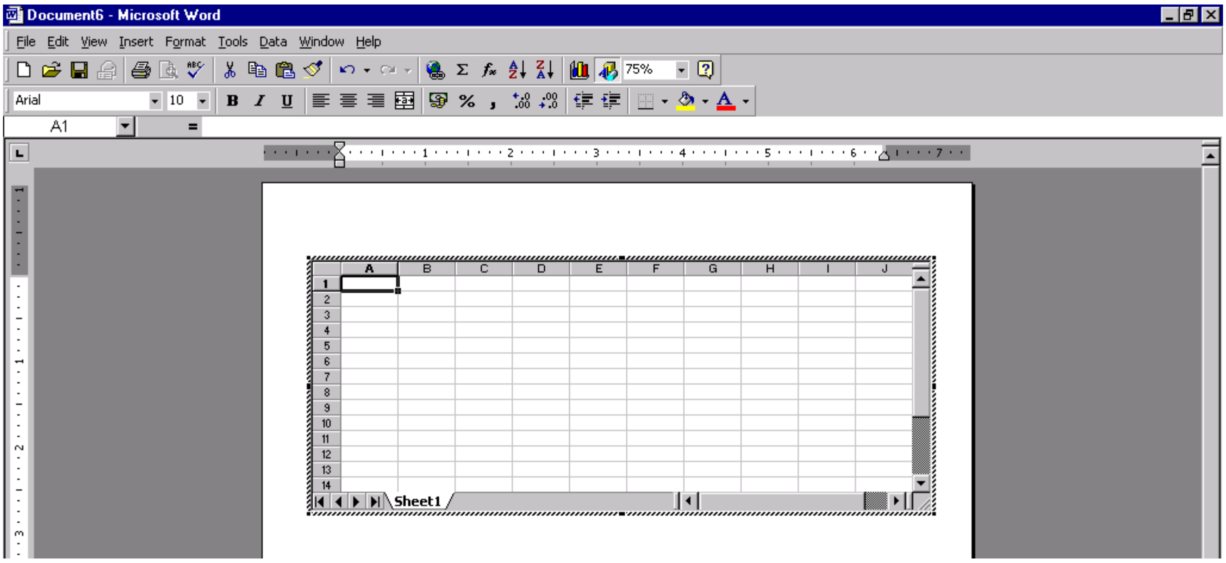
EMBEDDING A SPREADSHEET

If you wish to create a fresh spreadsheet and include it in your word document, you may do this without exiting Word. The spreadsheet you create is embedded in the document as an "Object". It can be accessed and changed but is NOT available as an Excel spreadsheet in its own right.

The spreadsheet this creates exists only inside Word, it is NOT an Excel file

- **Place the cursor** in the Word document where the spreadsheet is to **appear**.
- Click on the "**Insert Microsoft Excel Worksheet**" icon 

A spreadsheet window will open in your Word document and offer you a blank spreadsheet.



- Set up the spreadsheet just as you would in Excel
- Click on the blank area **outside the spreadsheet**.

The spreadsheet area will appear in the Word document at the point of the cursor. It is an "Object" and can be cut, copied, pasted, sized and dragged. Use the **[Tab]** and **[Return]** keys to position the spreadsheet area as if it were a large lump of text.

Inside Word the spreadsheet **may not look the same as it did in Excel**, this occurs because the spreadsheet in Excel is viewed larger than its printed size, whereas in Word it is viewed smaller. However, when printed it will retain its integrity and print as it looked in the Excel programme.

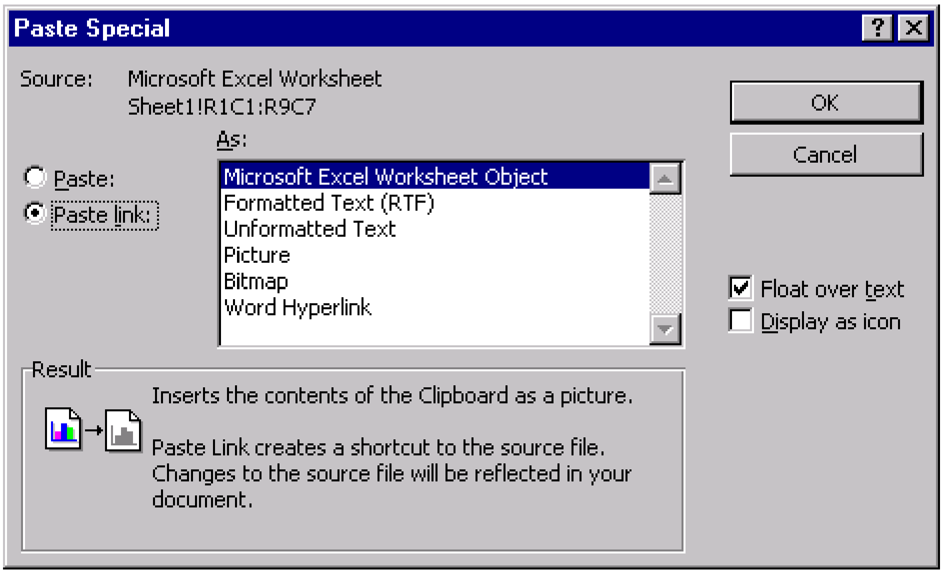
To Re-Enter The Excel Spreadsheet Area To Reformat, Edit Or Amend The Text.

- **Double** click on the **spreadsheet** area, it will re-open with the and you can work on it as a normal spreadsheet.
- Close the spreadsheet to the update any changes

IMPORTING ACTIVE SPREADSHEETS

In order to import a spreadsheet that will upgrade as changes are made to the original in Excel, you have to "Link" the "Source" file - the spreadsheet - to the "Destination" file - the Word document. This means that Excel can "talk" to Word.

- Open **Excel**, then open the **relevant spreadsheet**
- In the spreadsheet, **highlight the area** to be added to your Word document.
- Click on "**Edit**" then click on "**Copy**", or use the "**Copy**" **icon**
- **Return to Word** and **place the cursor in the document** at the location you wish the spreadsheet details to appear,
- Click on "**Edit**"
- From the edit menu select "**Paste Special**", the following screen appears:



- Click on "**Paste Link**" on the left side and under "**As**:" select either:

Formatted Text (RTF)	To insert the details as an active Word TABLE which can be edited in the same way as a normal table.
Microsoft Excel Worksheet Object	To insert the details as an active Word Object which can be edited by double clicking

- Click on "**OK**"

Each time you open the Word document it will upgrade with any **new** details inserted in the spreadsheet. If both documents are open at the same time, then the upgrade is simultaneous - occurring in the Word document as the spreadsheet is changed.

Do NOT move or rename the Excel file, as Word will be UNABLE to find it for future changes and upgrades to your document.

MULTILEVEL PARAGRAPH NUMBERING

GENERAL

It is possible to number paragraphs and lines throughout your document and relate the numbering to the “level” of the paragraph. Thus the document can be set up with main text, sub text and sub, sub text all numbered accordingly.

The multilevel system relies on indentation to inform it of the numbers to allocate to the text, ie the greater the indentation the lower the level of the text. Eg:

1 Flower

1.1 Rose

1.1.1 Red

There are two ways of approaching the multilevel numbering of text:

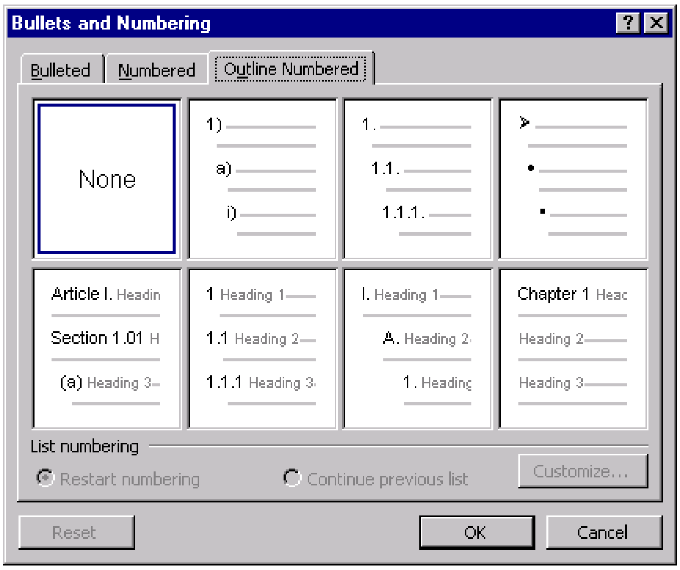
1. Initiate the numbering then type the text.
2. Type the text then Initiate the numbering

- Of these, option 2 is the easier

It is NOT possible to use this function if you have used any of the 3 Heading styles in the “Style” selection box on the toolbar.

ADDING MULTILEVEL PARAGRAPH NUMBERS

- Create the **document,** then **select all the text you wish to number**
- Click on “**Format**” in the menu bar, then “**Bullets and Numbering**”
- The following screen will appear, select “**Multilevel**” to bring it to the front.



- Double Click on the desired **box to apply that numbering style**

The paragraphs will acquire numbers, once the text is numbered it is then possible to make adjustments to the presentation.

REMOVING THE NUMBERS FROM TEXT

- Highlight the paragraph(s) or lines of text then click on the "**Numbering**" icon

CHANGING THE LEVEL OF THE NUMBERING

- Use the "**Increase Indent**" icon to further indent the text and push the **numbering** down to a **lower** level.

- Use the "**Decrease Indent**" icon to reduce the text indent and push the **numbering** up to a **higher** level.

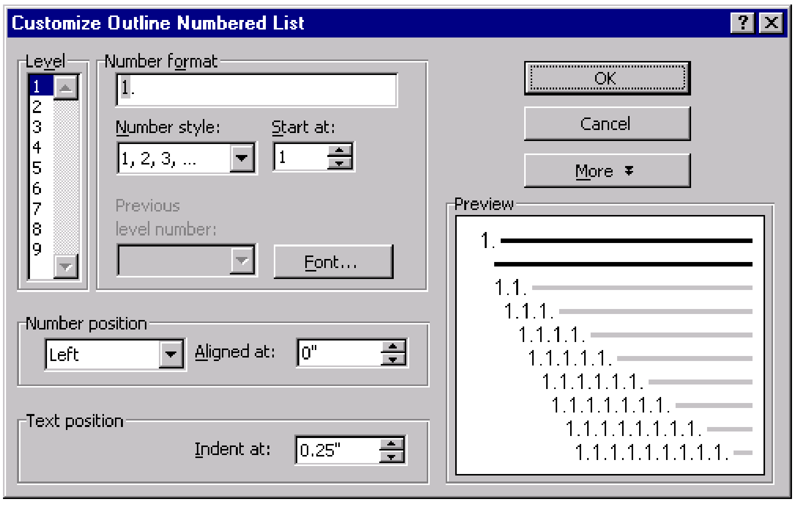
PRESENTATION

- If necessary, use the **paragraph indent icons** in the **ruler** to adjust the **physical indentation** of the text to your requirements.

CUSTOMISING MULTILEVEL NUMBERS

In most cases the options presented to you will be sufficient for basic documents, however, it is possible to amend the chosen format still further.

- To customise further, click on "**Format**" in the menu bar, then "**Bullets and Numbering**", then click on "**Modify**", another dialogue box will appear:



Use the "Preview" sample at the right side of the box to see the effect of changing the settings in the dialogue box for each level of paragraph numbering you require.

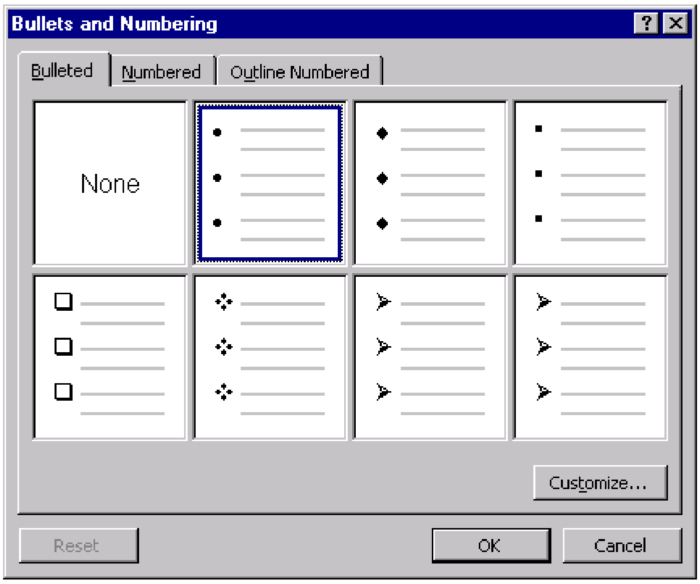
Each time you customise Multilevel Numbering it will conform to your settings. However, the style is temporary and will only last till you log out of Word. To use this format again, you will have to re-instate the settings next time you re-enter Word.

CUSTOMISING BASIC BULLETS AND NUMBERS

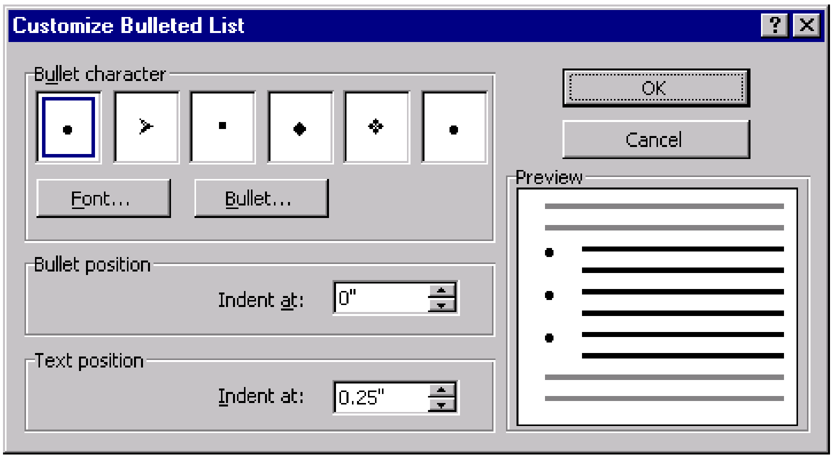
Should it be necessary, you can create different styles of bullets and numbers.

- Click on "**Format**" then click on "**Bullets and Numbering**"

The following screen will appear, from the selection provided you can choose a basic style, then go on to make specific selections to customise your bullets or numbers.



- Click on the tab indicating "**Bulleted**" or "**Numbered**", then click on your choice of basic style of Bullets or Numbers in the display
- To customise further, click on "**Customise**", another dialogue box will appear:



Use the "Preview" sample on the right side of the box to see the effect of changing the options in the various parts of the dialogue box.

Each time you customise Bullets or Numbers they will conform to your settings. However, the style is temporary and will only last till you log out of Word. To use this format again, you will have to re-instate the settings next time you re-enter Word.

DOCUMENT PROTECTION

It is possible to protect a document in order to maintain confidentiality or to prevent casual or deliberate changes by other individuals.

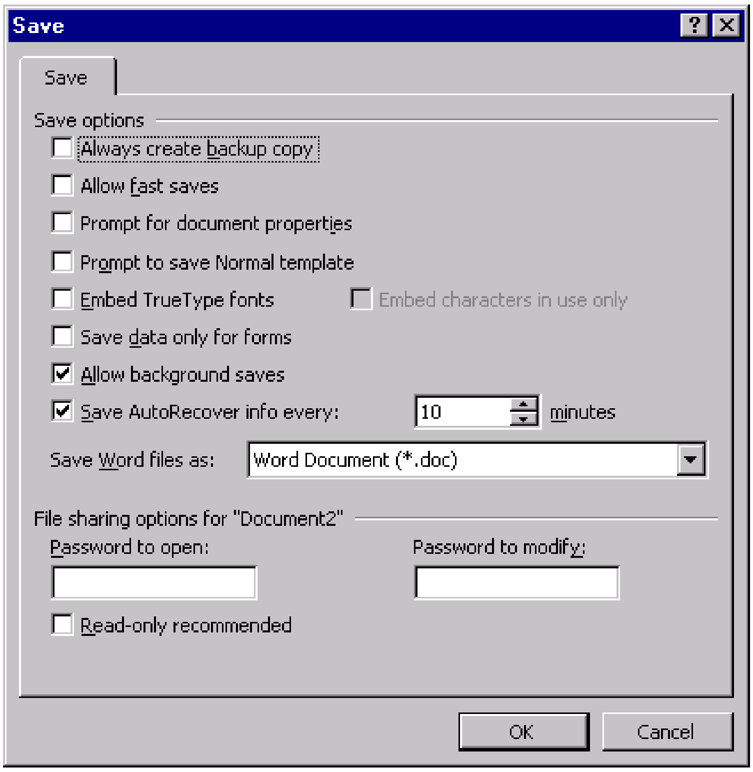
In all cases the function is effected when saving the document

- **Access** or create the **document**, click on "**File**" then "**Save**"

- **Name** the file, **select** the **directory** then click on the "**the Tools icon**" 

 and select **General Options** button.

A dialogue box will appear. An area labelled "**File Sharing Options For (Filename)**" is shown at the bottom of the dialogue box. This contains 2 main areas defining the desired level of protection.

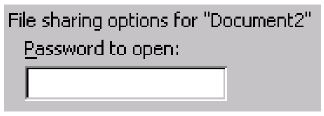


FULL DOCUMENT PROTECTION - NO ACCESS

A document can be locked **completely** by using a password, this restricts access to the individual who created it, or others to whom a specific password is known.

If you use this option be extremely careful NOT TO FORGET THE PASSWORD as there is NO other way to access the document.

- Click in the “**Protection Password**” box, type in a **password** upto **15** characters - this will show as **asterisks.**



- Click on “**OK**”, a small pop up screen will appear, asking you to **confirm** your password again. **Re-enter the password** and click on “**OK**” again.

The document is now fully protected. After the document is closed you will only be able to access it again if you know the password.

PROTECTING THE DOCUMENT FROM CHANGES

A document can be **protected from changes** whilst still allowing others to **access** it as “**READ ONLY**”. This allows them to read and if required, duplicate the document for their own use. The protection is actioned via a password, restricting the ability to save **changes in** the document to its creator, or others who know the password.

When using this option be careful NOT TO FORGET THE PASSWORD otherwise you will not be able to make changes to the original document, only copies.

- Click in the “**Password to Modify**” box and type in a **password** upto 15 characters - this will show as **asterisks**

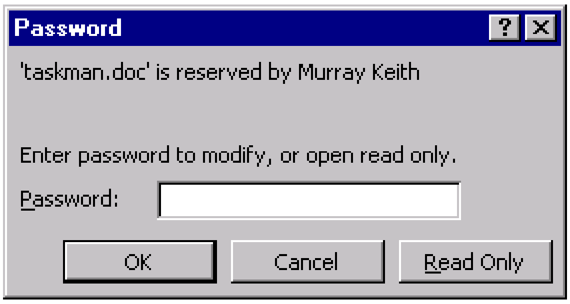
- Click on “**OK**”, a small pop up screen will appear, asking you to **confirm** your password again. **Re-enter the password** and click on “**OK**” again.

The document is now protected from changes. After closure, it can be opened as “Read Only” but changed only if the password is used when accessing the document .

USING “READ ONLY” DOCUMENTS

When “Write Reservation” is set on a document, any user can still access it as a “Read Only” document and use it as the basis for other documents. When you attempt to open a “Read Only” document, this dialogue box will appear:

- Click on “**Read Only**”



The document opens with the heading

In order to use the document as your own you will have to save it under a new name.

- Click on “**File**” then “**Save As**”
- **Rename** the file, **select** a **directory** if required, then click on “**Options**”
- Click in the “**Password to Modify**” just after the asterisks and **delete** all the asterisks to remove the current password.

You can now leave the document clear of protection by leaving the box empty of a password, or you can choose to insert a password of your own - protecting this document from changes by other users.

- Click in “**OK**” to confirm your actions, then “**OK**” again to confirm the save.

TEMPLATES

GENERAL

A template is a blueprint document. It is used as a mastercopy from which replicas of a document can be taken and used to create other documents in the same format. For example, our standard documents, Letter, Memo etc are produced by templates. The macros access the relevant template, take a copy and put it on the screen.

Templates are protected from accidental change, but they are **not fixed**. You can open them and edit or make changes to the format as you would normal documents. in addition, you can **create your own templates**, personal to your own work, to that of your department or the whole organisation.

The templates are held on the “C” drive in the “Templates” directory, the path name is found by

- Click on **Tools** ™ **Options** ™ **File Locations**
- Highlight **User Templates** and click on **Modify** to change the location

All template formats end with the suffix “**.DOT**”.

MODIFYING CURRENT MACRO TEMPLATES TO YOUR REQUIREMENTS

You may wish to make changes to the current templates, making them more appropriate to your needs eg, the Letter templates used by the macros are set up for 2 tray printers - used in most offices, if you have a 3 tray printer you will find that the standard documents tend to print out on the wrong paper, therefore, you may wish to reset the base templates so that they print correctly.

- Click on “**File**” then “**Open**”

- On the “**C**” drive, go to the "**Templates**” directory to view the contents.

A list of (.dot) template files will appear.

- Click on the **name** of the **template**, then click on “**OK**”.

Do NOT change Normal.dot

The template is fully open, make the required amendments just as for a normal document then, **without renaming**, **close** it and save the changes.

Because the name is the same, the macros will still run the template, therefore all standard documents subsequently produced will show the customised changes.

If at any point organisational changes occur which required IT to **amend the Standard Document Templates**, these amendments will be imposed on your machine. This will overwrite your personal changes. You will then have to reset any customisation to the affected templates.

CREATING NEW TEMPLATES

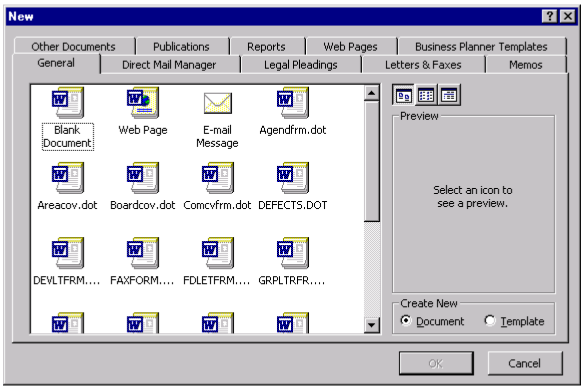
You may wish to create your own templates, master copies of forms that are specific to your work or that of your department. Alternatively, you may want to create a standard document that the whole organisation can use.

1. You can create new templates using the current ones as a foundation.
2. You can create entirely new templates of your own.

Making New Versions of Current Templates

Using the current templates as a base you can create your own templates, eg letters with standard text set up for specific purposes.

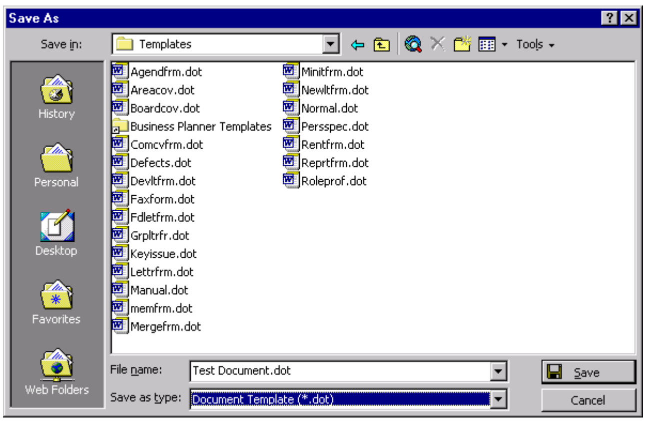
- Click on "**File**" then "**New**", the list of templates will appear.
- Click on the **name** of the **template** you wish to use as a foundation
- Now select "**Template**" in the "**Create New**" area on the bottom right hand side.
- Click on "**OK**"



A copy of the template will appear on screen, it will be headed "Template 1". Make the changes and alterations required.

When you start to name and save the document, the save screen will push you at the "**Template**" directory and will automatically save the file as a "Document Template" with the suffix ".dot".
You will not be able to change this, the selection box will be "greyed out". The only area that can be actioned is the "Filename" box.

- Enter the **new template name** at "Filename".
- Click on "**OK**".

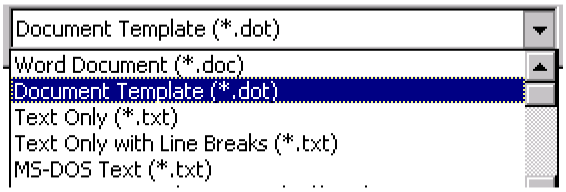


The new template now appears on the list of templates inside the ”File” “New” screen, it can be used as a base to create new documents. It is not accessed by the Macros.

Creating Totally New Templates

Creating a document and saving it as a template sets up new templates.

- Create the **document** to be used as a template, then go into “**File**”, “**Save**”
- Type in the “**FileName**”,
- In the “**Save File as Type**” box select “**Document Template**”
- Click on “**OK**”



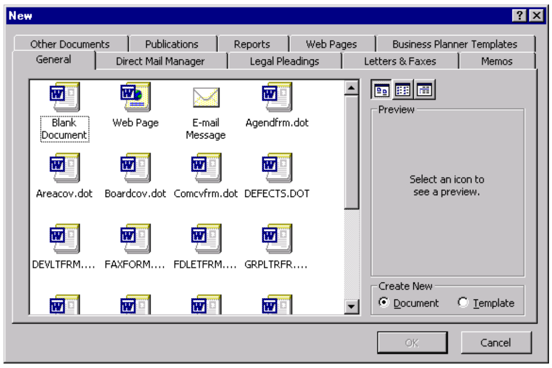
As soon as you select “Document Template”, the drives and directories will change to “**Template**” directory and the text will become greyed out. The file will be saved as a template with the suffix “.dot”.

The new template name now appears on the list of templates inside the ”File” “New” screen, it can be used as a base to create new documents.

ACCESSING AND USING TEMPLATES

Once created, templates can be accessed as many times as you wish, each time a new blank copy of the document will appear on screen for you to complete. Templates cannot be changed by accident, only by deliberately accessing the foundation document.

- Click on “**File**” then “**New**”, the list of templates will appear.
- Click on the **name of the template** you want to use.
- Ensure “**Document**” is selected in the “**New**” area on the bottom left hand side.
- Click on “**OK**”



A copy of the template will appear on the screen as a normal document, you can change the copy in any way you wish, then save it either as a normal document or as a different template.

Templates can be issued by disc to individuals, or if you wish them to be available to the whole organisation, referred to IT for installing on the main system.

ADDING HYPERLINKS AND E-MAIL ADDRESSES

BY TYPING THE ADDRESS IF KNOWN

You can insert a hyperlink into a document by typing the address of the link.

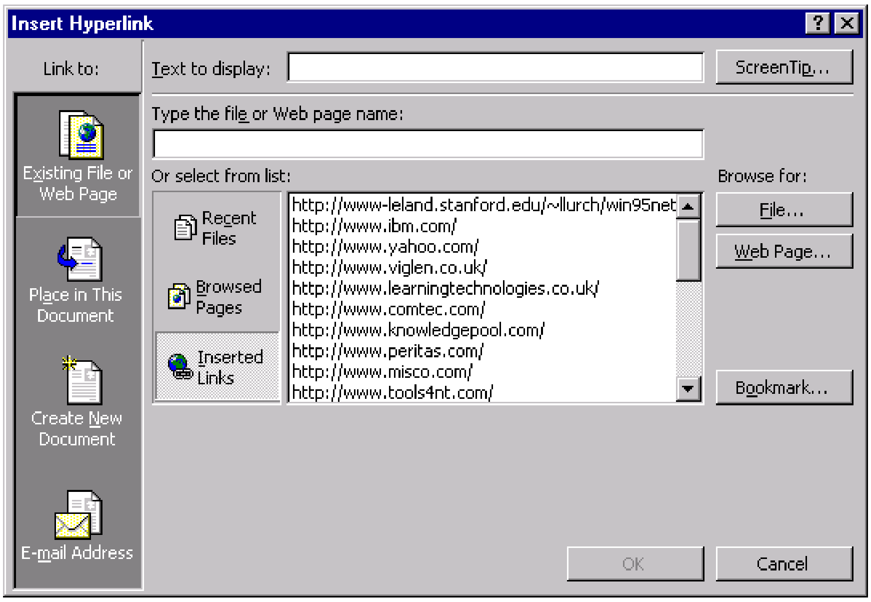
i.e. www.microsoft.com

You can also type a persons e-mail address.

i.e. mkeith@notting.org

BY USING THE INSERT HYPERLINK DIALOG BOX

Click on the insert hyperlink button on the toolbar



Select one of the links shown in the history or click on the web page 

button to surf the internet/intranet for the page of your choice.

Once you find the page of your choice then click on the Word

button for the document you are working with on the Startup bar at the bottom of the screen.

Click on 

to insert the hyperlink.