
UNIT 8 ADVANCED FEATURES IN WORD

Structure

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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 biographical 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, financial reports, catalogues and resumes.

8.2 OBJECTIVES

After going through this unit, you should be able to:

- use mail merge, and
- Create and modify data in tables.

8.3 MAIL MERGE

Mail merge technique allows you to create a document (such as form letter, invitation) and set of information of recipients (such as names, addresses) and you merge them. When you merge the form letter with list of names, you can generate the required letter for each of the recipient. In this procedure, you have to create a letter once, combining it with your address list and send to multiple recipients.

For example, if you want to invite 50 people on workshop. 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.

To perform mail merge, you will need the following:

- A main document
- Data Source or recipient list

Main Document

This is the identical content that appears in each letter that mail merge creates. The main document can be a form letter, labels, envelopes, an invitation or any type of document. The document can be appended with some unique information and field names such as name, address which MS Word will replace automatically with the recipient list or data source. The main idea behind this technique is that you create one document but that can be sent to people in a recipient group.

Data Source

A data source is a file that contains the name, addresses list that varies in each copy of merged document. The data source may be created during the merge process using templates or an existing file. The existing file may be Excel (.xlsx) file. Mail Merge uses this data to make different letters with the same content but different personal information.

The following example is explained with built-in templates for data file. Excel are discussed in Unit 11 and 12, therefore, after going through these units, you may try to create data file using this application and use it with mail merge using the following similar steps.

Perform the following six steps for using mail merge:

1. Select Type of Mail Merge
2. Select Your Recipients
3. Edit Recipients List
4. Inserting Fields
5. Previewing Merge Document
6. Finish Merge Document

8.3.1 Select Type of Mail Merge

To use mail merge first you must create a letter using the following steps:

- Select **Mailings** tab on Ribbon
- Click on '**Start Mail Merge**' option, a drop down menu will display a list of options. You can select any option such as Letters, Labels, Email messages, Directories, Envelopes or step by step mail merge wizard. Suppose, you have selected letters as an option (see figure 8.1) and type the sample letter for your practical work (see figure 8.2)

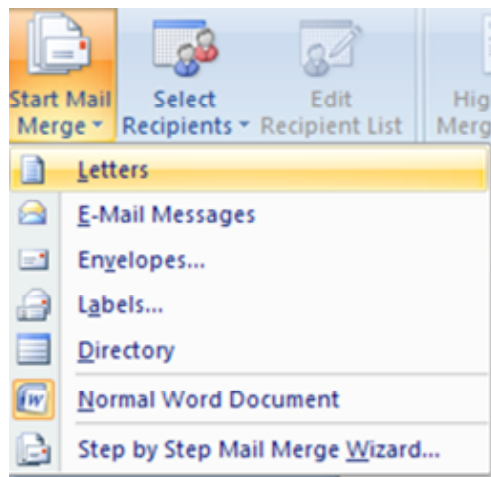


Fig. 8.1: Select type of Mail Merge



Fig. 8.2: Sample Letter

8.3.2 Select Your Recipients

Now, you should create the recipient list using the following steps:

- You can click on '**Select Recipients**' button from the 'Start Mail Merge' group of **Mailings tab** ribbon. (see Figure 8.3)

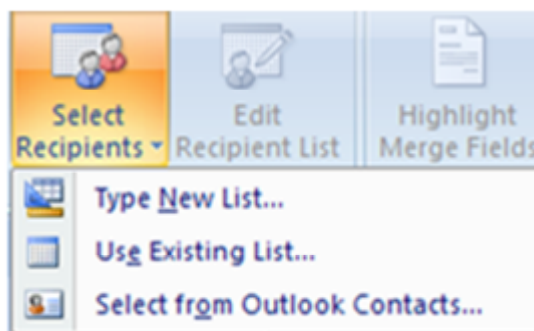


Fig. 8.3: Select Recipients menu

- A list appears, in which you have to select '**Type New List**'. The following screen will be display for data entry.

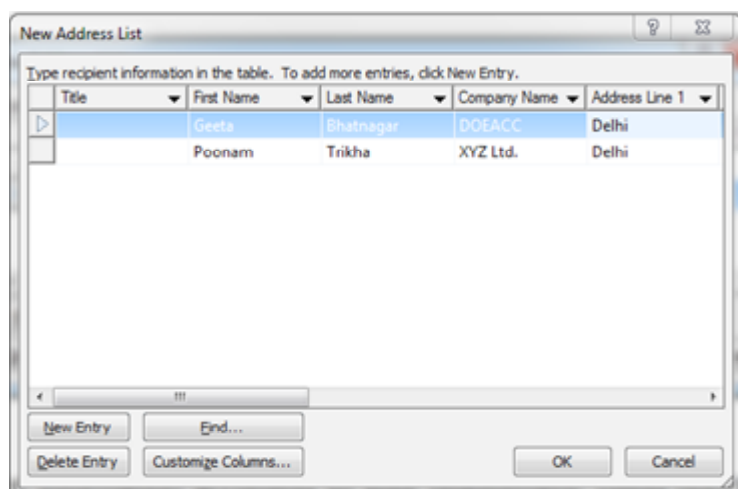


Fig. 8.4: Recipients Data Entry window

- Type the information according to your requirement. Using horizontal scroll bar, you can see long list of field names.

- To add more data row in the table, click on New Entry button (see Figure 8.4).
- To save your data entry, click on OK button, it will open a dialog box, in which give a name to your data and select 'Save' button (see Figure 8.5).

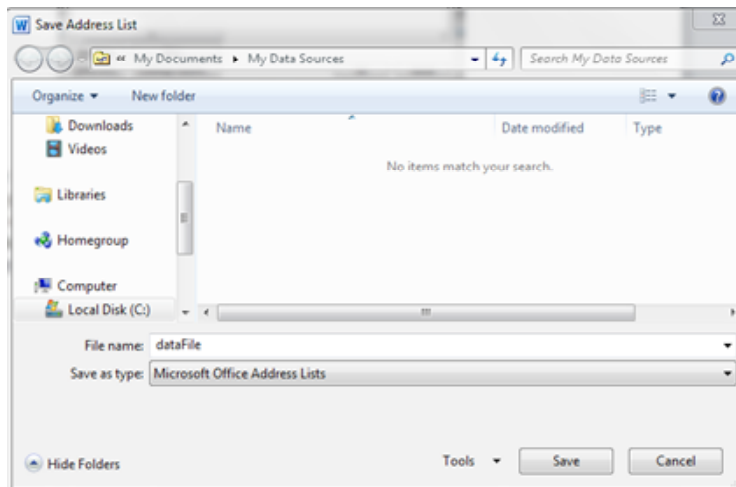


Fig. 8.5: Save Address List

8.3.3 Edit Recipients List

When you build up a data list, 'Edit Recipient List' will be enabled. If you select this button, then it will allow you to make changes in the existing recipients list. You can find 'Edit Recipient List' option on 'Start Mail Merge' group under Mailings tab. Using the following window, you can do the following with data:

- Select or deselect your data from the list
- Sort your data items as ascending or descending order
- Add or change your data list
- Filter data in the list (see Figure 8.6)

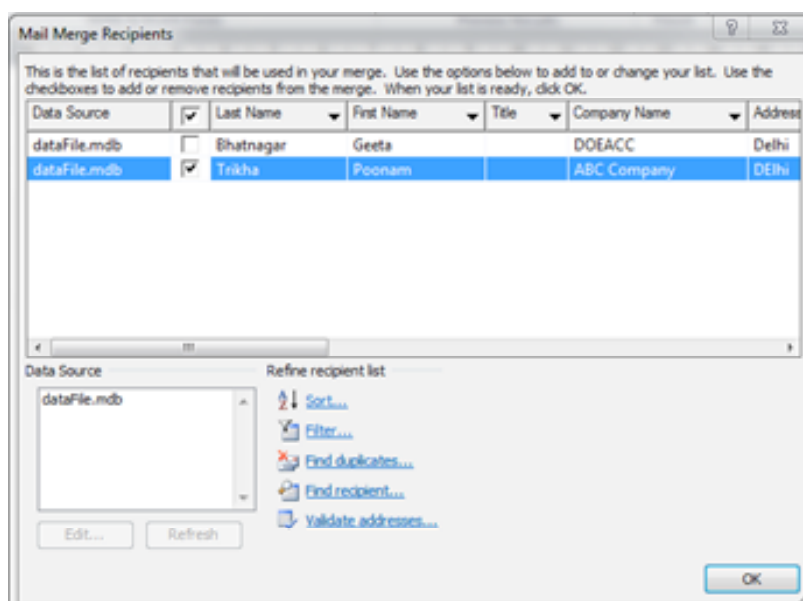


Fig. 8.6: Edit Mail Merge Recipient List Screen

8.3.4 Inserting Fields

In previous section, you have created recipient list. Now, it is time to insert fields into a main document. Although, Word provides you a variety of options for adding merge field names to the main document.

To insert merge field names,

- Click on **Mailings tab** Ribbon.
- Select '**Insert Merge Field**' option from '**Write & Insert Fields**' group.
- A menu list appears, in which you have to select fields name (for example, First_name) see Fig. 8.7
- Repeat the above step until your desired fields are added to the merge document and add fields like the highlighted portion of the following Fig. 8.8.

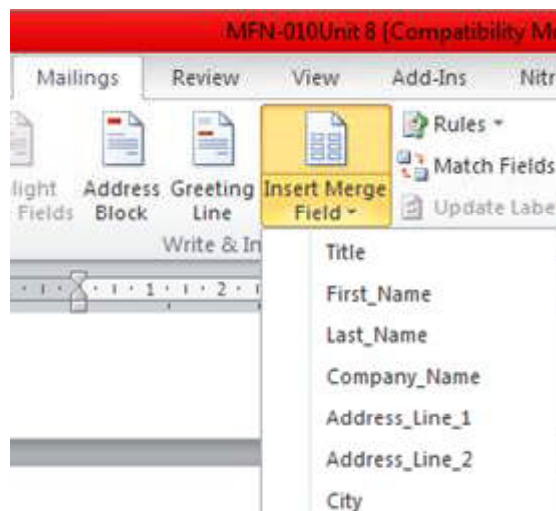


Fig. 8.7: Merge Document

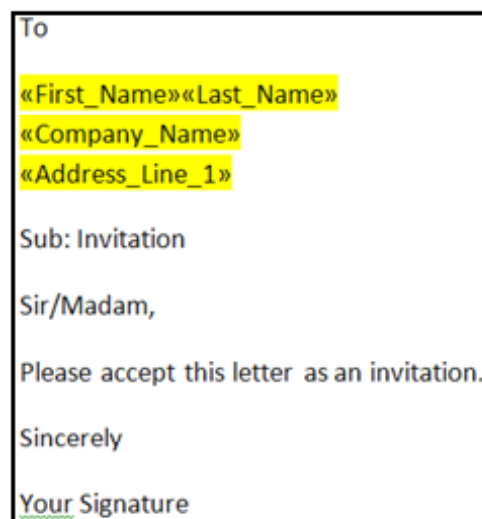


Fig. 8.8: Inserted Mail Merge Field Name

8.3.5 Previewing Merge Document

Using MS Word '**Preview Results**' option, you can see your results of merge document.

To previewing result data,

- Click on '**Preview Result**' from Preview Result group on Mailings tab Ribbon (see Fig. 8.9)

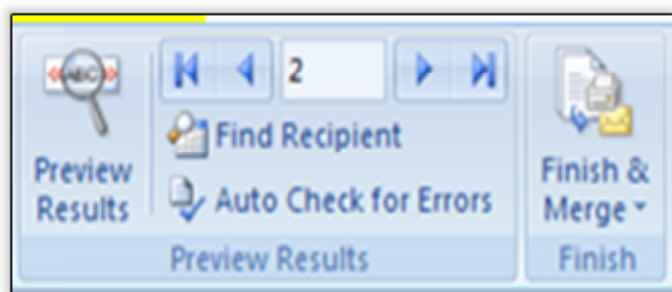


Fig. 8.9: Preview Result Screen

- The syntax of field names of main merge document will be replaced with data name from your recipient data list.

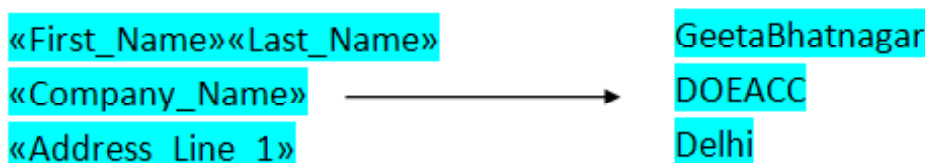


Fig. 8.10: Mail Merge data Display

Here, you have seen in the Fig. 8.9, the record pointer is on number 2. So, it will show record no. 2 in place of fields' syntax (see figure –8.10). You can see rest record using record pointer.

8.3.6 Finish Merge Document

In the previous sections, you have created a letter, inserted recipient list and previewed your merged document. Now, you can give a finishing touch to your mail merge document and to create a separate document for each record in recipient list and send them all directly to the printer or email.

For this, you can use any one option from the following:

- 1) Edit Individual Documents (creating a single copy for each recipient)
- 2) Print a document
- 3) Send E-Mail Messages

Edit Individual Documents

If you want to edit individual documents, you can complete your mail merge process by the following ways:

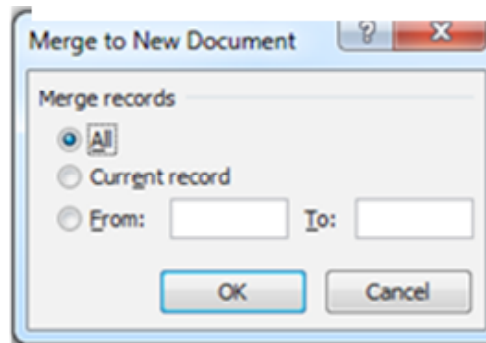


Fig. 8.11: Merge document options

- Click the '**Finish & Merge**' button on Finish group from Mailings tab ribbon.
- From menu, select Edit Individual Documents. A window will display in which you can select 'All' option and click on Ok button (see Fig. 8.11)
- A new window will open for each recipient.

In similar way, you can use other two options such as **Print documents** and **send via mail messages** for your merging document. For mail merge document printing, Printer is necessary for printing separate copy and to send through email but for this process, outlook setting and Internet connection is necessary.

8.4 TABLES

A table is an arrangement of information in rows and columns. The intersection of rows and columns is called 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.

Tables are used for various tasks such as presenting text information and numerical data in a table format. In this section, you will learn how to create or draw a table, convert text to a table; apply table styles, insert rows and columns, split and merging cells, as well as import Excel sheet.

8.4.1 Create a Table

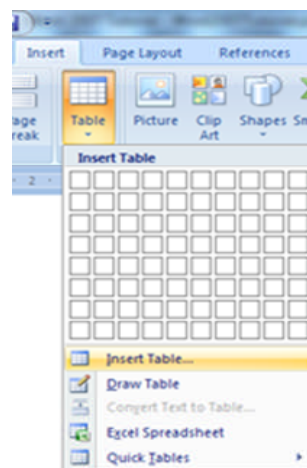


Fig. 8.12: Create a Table

For creating a blank table, you can do the following steps:

- Place your insertion point in the document where you want to place the table.
- Select the Insert tab of the ribbon (see Fig. 8.12).
- Click on table button under Tables group, you can create a table one of the five ways:
 1. Drag your mouse over the palette to create a table with the highlighted number of rows and columns **OR**
 2. Click on **Insert table** and enter required number of rows and columns **OR**
 3. Click on the '**Draw table**'; create your table by using pencil object **OR**
 4. Click on '**Excel Spreadsheet**' to import excel table **OR**
 5. Click on '**Quick Tables**' option to create built-in tables such as Calendar, tabular list and matrix form table structure.

Once you create a table, place the cursor in the cell where you wish to enter the information and begin typing.

Using Insert Table option to create table

If you choose the 'Insert Table' option of Tables Group of Insert tab to create the table, dialog box is invoked as given below with table size and AutoFit behaviour options. You can specify the table values for the following way:

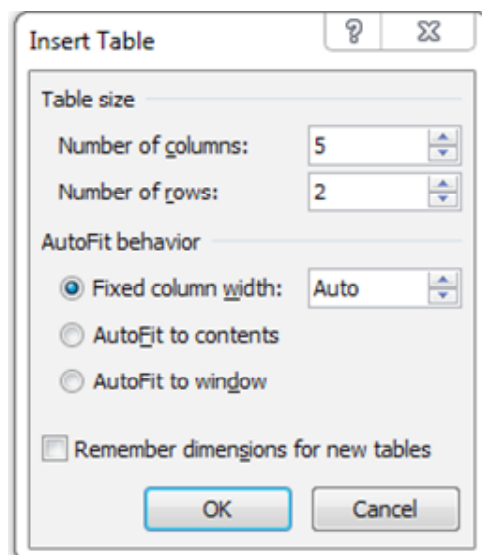


Fig. 8.13: Define table behavior

- In **table size**, you can specify the number of columns and rows which you want to create.
- In **AutoFit behaviour**, you can select one option, out of the three options which are given below:
 - **Fixed column width:** Using this option, you can select a specific width for the columns you create.

- **AutoFit to contents:** This option automatically adjusts the width of columns to fit the table data you enter.
- **AutoFit to window:** This option resizes the table so that it fits the contents within a Web browser window.

8.4.2 Modify Table Structure

For modification of the table, you can **add new rows and columns; delete existing rows and columns** as well as table, **split and merge cells**. In designing part of the table, you can give a new look to table which contains the color and design of border, rows, columns, header and footer.

When you want to modify table, click on the table and you will have notice that there are two new tabs on the Ribbon: **Design** and **Layout**. These tabs include all the features that are mentioned above.

To modify a table, click on table that you have created and then click the **Layout** Tab on the Ribbon. This Layout tab allows you to:

- Insert Rows and Columns
- Split or Merge Cells
- Delete table, Rows and/or Column

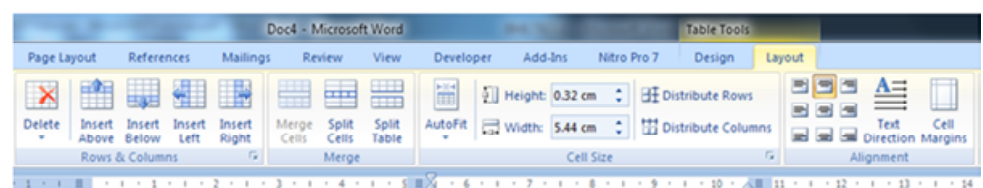


Fig. 8.14: Layout tab for modifying a table

Insert Rows in Existing Table:

For the following way, you can insert row either above or below of the selected row in existing table:

- Place the insertion point in the row where you want to insert the new row.
- To insert one row at a time, click on '**Insert Above**' option on 'Rows & Columns' Group of Layout tab Ribbon for above of the selected row.
- In similar way, click on '**Insert Below**' to insert one row below to your selection.
- Alternatively, right click on the table and select Insert (see Fig. 8.15) and click on "Insert Rows Above", if you want to add new row above your selected row. Otherwise, you can click on "Insert Rows Below". This option will add new row below your selection.
- This way, you can add one row at a time.

Insert Columns in Existing Table:

You can add new columns to the left or right of the existing column. Do the following:

1. Place the insertion point in the column where you want to insert the new column.
2. To insert new column left or right to your selection, click on '**Insert Left**' or '**Insert Right**' option on 'Rows & Columns' Group of Layout tab Ribbon (see Fig. 8.14).
3. Alternatively, right click on the table and select Insert from shortcut menu (see Fig. 8.15) and click on "Insert column to the Left" to insert column left. Otherwise, you can click on "Insert column to the Right" to insert column right.

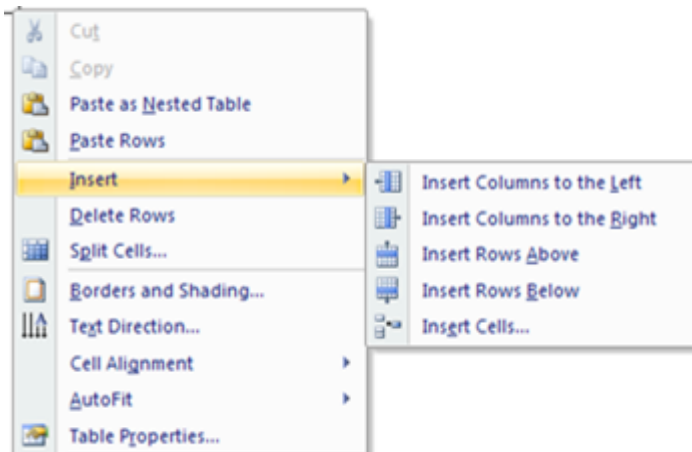


Fig. 8.15: Shortcut menu for inserting rows and columns in existing table

Split and Merge Cells

Fig. 8.16: Merging Cells

When working with tables, you may want to merge two or more cells or split cells into more cells.

Merging Cells:

The 'Merge Cells' feature is used to combine the content of multiple cells into one cell.

- Select the cells to be merge
- Right click within the selected cells
- Select Merge Cells,
- The selected cells are merged (figure 8.16).

Splitting Cells

You can split one cell at a time. To Split the cells, by using the following steps:

- Select the cell to be split
- Right click on selected cell; a split cells dialog box will appears.(see Fig. 8.17).
- In split cells dialog box, select the desired number of columns and rows.
- Click ok and selected cells are split according to your requirement.

You can see all the splitting cell process in the following figure-8.17.

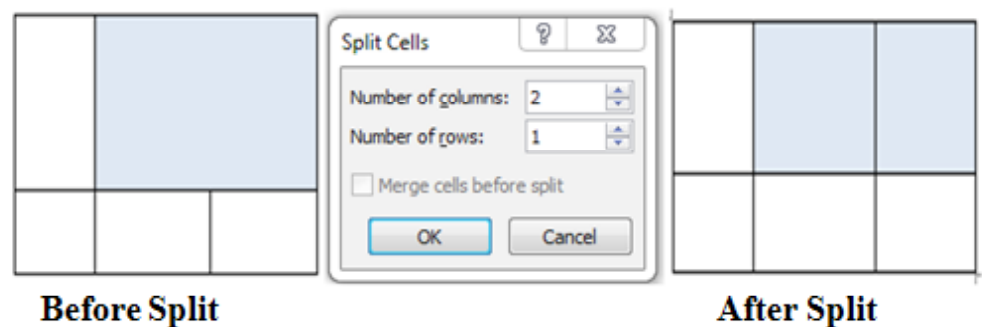


Fig. 8.17: Split Cells Dialog Box

Delete table, cells, Rows and/or Column

Word provides you four options (see Fig. 8.18) for deletion as:

- 1) Delete Cells
- 2) Delete Columns
- 3) Delete Rows
- 4) Delete Table

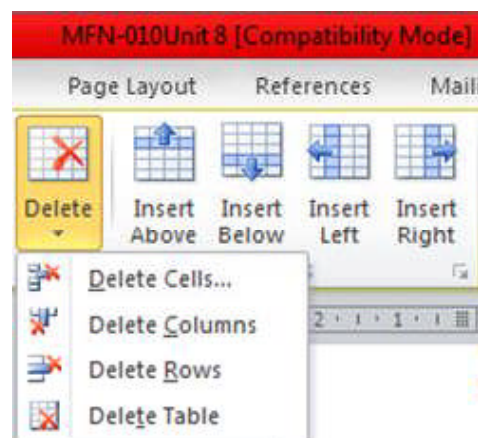


Fig. 8.18: Delete options for Table

To delete table or cells or rows or columns, you can select '**Delete**' option on 'Rows & Columns' Group of Layout tab Ribbon for table deletion. When you click on down arrow of Delete option, you will get four ways to delete:

1) To Delete cells:

- When you select Delete Cells option, a Delete Cells dialog box gets invoked as displayed in the Fig. 8.19.
- Select one of the following options in the Delete Cells dialog box

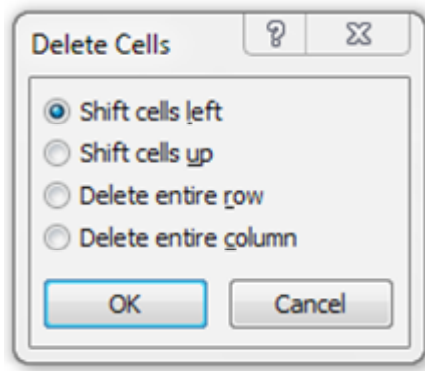


Fig. 8.19: Delete Cells dialog box

- 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.

2) Delete Columns:

- Place the cursor on the column which you want to delete and select **Delete columns** to delete the particular column (figure 8.18).

3) Delete Rows:

- Place the cursor on the row which you want to delete and select **Delete rows** to delete the particular row (figure 8.18).

4) Delete Table:

- Select the table for deletion and click on '**Delete Table**' option to delete the entire table (figure 8.18).

8.5 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.

You can create a table with different methods such as draw table through pencil, insert table from Excel Spreadsheet, built-in or quick table i.e. calendar, double table, matrix and tabular list. You can modify the structure of a table by inserting new row or column, delete existing row or column, splits or merge

cells within the old table, according to your requirement. Using tables, you can write information text in tabular form, so it can be in more readable or understandable.

Both these concepts can be used easily. You should keep on using these features and soon you will be an expert yourself.

8.6 CHECK YOUR PROGRESS EXERCISE

- 1) What are the basic steps involved in Mail Merge?
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- 2) Can database of another applications act a data source for mail merge in Word?
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- 3) How can you create a recipient list for mail merge?
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- 4) What are the steps to merge the main document and the data file in mail merge?
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- 5) Define table and how to create a table in word?
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- 6) What are the options in the Delete Cells dialog box?
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- 7) Below is given a letter and some addresses, this letter is to be sent to all following addresses using the Mail Merge option.

Type the following sample letter:

To,
<<Name>
<<Address>>

Dear <<Name>>,

You are called for an interview on the <<Date>> at 9:30 A.M. with your original documents.

Yours Sincerely

XYZ Ltd.,

Addresses are:

Ram Mohan Roy, House No. – 1234, Kolkata

Harish Chandra, House No.. – 9891, Varanasi

Bhavna Jindal, House No.. – 458, Dwarka, Delhi

- 8) Create a table like the following figure (a) and after creation, merge cells like figure (b).

Fig. (a) : Create a Table

Fig. (b): Merge Cells in Table

8.7 ANSWER TO CHECK YOUR PROGRESS EXERCISE

- 1) The basic steps involved in Mail merge are creating main document, specifying a data source, inserting the fields in document and merging the data file and the main document.

- 2) Yes database of another applications act a data source for Mail Merge in Word.
- 3) You can create the recipient list using the following steps:
 - You can click on 'Select Recipients' button from the 'Start Mail Merge' group under Mailings tab on ribbon.
 - A list appers, in which you have to select 'Type New List'. According to your requirement, type the information into new window. Using horizontal scroll bar, you can see long list of field names.
 - If you want to add more data row in the table, click on New Entry button.
 - To save your data entry, click on OK button, it will open a dialog box, in which give a name to your data and select 'Save' button
- 4) To merge the data file and the main document, follow these steps:
 - Select Type of Mail Merge
 - Select Your Recipients
 - Edit Recipients List
 - Insert Fields
 - Preview Merge Document
 - Finish Merge Document
- 5) 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.

For creation of table, you can select table button under Tables group of Insert tab and create a table one of the five ways:

- Drag your mouse over the palette to create a table with the highlighted number of rows and columns OR
 - Click on Insert table and enter required number of rows and columns OR
 - Click on the 'Draw table'; create your table by using pencil object OR
 - Click on 'Excel Spreadsheet' to import excel table OR
 - Click on 'Quick Tables' option to create built-in tables such as Calendar, tabular list and matrix form table structure.
- 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
 - Shift cells up radio button to move the cells in the column up after the deletion, or

- Delete entire row radio button to delete the row that contains the selected cell, or
- Delete entire column radio button to delete the column that contains the selected cell.

- 7) This is a practice exercise. Try doing it yourself.
- 8) This is a practice exercise. Try doing it yourself