4.0 Introduction

This unit discusses two important concepts in world: Mailmerge and Macros. Word's Mail Merge feature is a quick and easy way for mass-producing form letters, envelopes, mailing labels, phone lists etc. By using Mail Merge, you can send the same letter to a number of people, without typing the original letter more than once.
A Macro is a sequence of actions that is named and stored. When you run a macro, Word performs all the assigned actions in sequence. You can assign a macro to a key, a combination of keys, a tool button, or a menu. The Macro feature basically helps in faster editing and formatting.
This unit also explains the details of managing Word documents, which includes creating, opening, saving and protecting documents.
The end product of a Word Processing session is usually a printed document. Before printing from Word for the first time, you must check that your printer setup is correct. And Word's Print Preview feature used before printing any documents, helps in checking that all its elements are in place. All these printing options have been explained in detail in this unit.

4.1 Objectives

After going through this unit, you will be able to

- create a data source for the document
- merge the addresses for printing on envelops and labels
- create and run macros in Word
- protect your document
- printing of your document

4.2 Mail Merge

Word's Mail Merge feature lets you quickly create personalized correspondence and other documents by combining information (merging) information from two different files.
For instance, you could merge a list of names and addresses from one file (your data document) with another file (your main document) to produce a number of personalized form letters.
You could also create catalogs, forms with variable information fields, or labels. You insert data instructions (fields) in the main document wherever you want data from the data source to appear in your merged documents.
Mail Merge feature can also be used to prepare other kinds of merged documents such as catalogs, parts lists, directory lists forms or invoices, print addresses on envelopes and mailing labels.

4.2.1 Data Sources & Main Documents

Data Sources are organized collections of information - databases-stored as Word tables. Word can also use data from other applications such as MS Excel or MS Access. After opening a data source in another application, make sure that the merge fields in your document match those in the data source. All data sources, no matter where they come from, contain records and fields. For example, an employee data source would contain one record for each employee. This record would contain multiples fields - one for the employee's first name, one for the middle initial, one for the last name, one for each part of the address and so on.

The data source contains the information that can vary in each version of a form letter, such as the names and addresses.

You can either open an existing data source or create a new one in Word.
Main documents as mentioned earlier contain the text of your project (the body of a letter), fields, and merge instructions.

Main Documents can be used from earlier versions of Word or from other Applications.
While using the Main document from other applications, open that documents in Word 6 and convert its contents to Word for Windows. However, field names and formatting from some applications may not translate well into Word for Windows format. Check the fields in your main document and adjust them if necessary before completing the merge or you can paste the main document into Word for Windows as plain text, then apply the formatting and centering the field names.

4.2.2 Starting & Editing the Main Document

Creating a merge main document, such as form letter, is a three-step process.

Step 1: To set up the main document, which contains the text, punctuation, and other items that remain the same in each version of the form letter.

Step 2: To set up a data source, which contains the information that varies in each version. This can be done either by opening an existing data source or creating a new one.

Step 3: To complete the main document by inserting merge fields and by typing or adding information you want to be the same in each form letter, such as the body of the letter, your address and your logs.

Step 1: To start the main document:

i) Select the create button to start creating your main document. A list will drop down offering you four choices-Form Letters, Mailing Labels, Envelopes and Catalogs.
ii) Select the type of main document you want. A dialog box appears offering you the choice of the active window or a new main document.
iii) Choose the Active Window button if the active window contain information for your main document or choose the New Main Document button if the active window doesn't contain any information for the mail merge.

Whichever button you choose, Word will return to the Mail Merge Helper dialog box and the space below the create button now lists the information you've entered so far-the type of merge and the main document to use.

Step 2: Next, you need to specify the data source and arrange in it the fields that will be available to your main document for the merge.

i) Click the Get Data button to display a list of options for your data source.
ii) If you already have a data source that you want to use, select Open Data Source or if you want to create a new one, select Create Data Source.

Creating a Data Source

The Create Data Source dialog box that appears when you choose Create Data Source contains a list of commonly used field names under "Field Names in Header Row" box. The next step is to add field names in the data source. This can be done by selecting the field names from the Field Name in Header Row box or by adding the new ones to it. These field names can be upto 40 characters long and contain letters, numbers, and underscore (_). They cannot contain spaces and must start with a letter. The following operations on the field names can be done:

1. To delete a category from the data source, select it and choose Remove Field Name button.
2. To add a category to the data source, type the new field name in the Field Name box and then choose Add Field Name button.
3. To change the order of field names, select a field name in the field names in Header Row box, and then click the up or down arrow at the right of the list until the field name is in the desired position.

When you finish creating the field names, choose the OK button. Word then displays the Save Data source dialog box. You save the new data source by giving a new filename to it.
Word then displays a message asking you whether you want to edit the data source or edit the main document. Choose the Edit Data Source button to type the information that varies in each version. The Data form dialog box appears. Type the information you want in each data field box and then press ENTER. To move to the next or previous data field box, press TAB or SHIFT+TAB.
Continue typing information, choosing the Add New button to start each new record. Choose the OK button in the last.

Opening a Data Source

To open an existing data source, Select Open Data Source from the Get Data drop-down list. The Open Data Source dialog box that appears works just like the File Open dialog box. Select the document you want to use and click OK. Word will open the document and return you to the Mail Merge Helper dialog box.

Step 3: One you've completed the second step-Creating a new data source or Opening an existing data source-you can complete the main document by inserting merge fields and by typing or adding information you want to be the same in each form letter.

This can be done by:

a) Completing a form letter main document:

Type or add any text and graphics you want to include in each letter. Then insert a merge field where you want each category of addressee information to be printed. Place the insertion point in the document where you want to insert information from the data source, click the Insert Merge field button on the Mail Merge toolbar and then choose the appropriate merge field. Choose save from the file menu after editing the main document.

b) Merging the data source with the main document:

Before merging the main document with the data source, the following things should have been done:

1. All the addressee information in the data source should have been typed.
2. All the merge fields should have been inserted at the desired location into the main document.

To merge a data source with the main document

1. Click, the View Merged Data button on the Mail Merge toolbar while the main document is in the active window. Word displays information from the first data record in place of the merge fields in the main document text. To view information from other data records, click one of the arrow buttons on the Mail Merge toolbar, or type a record number in the Go To Record box.

4.2.3 Merge Printing Labels & Envelopes

Word's Mail Merge Helper can also be used to merge labels and envelopes. The procedures for merging labels and envelopes are very similar to those for form letters.
Printing Addresses on Envelopes
Word 6 offers the ability to print addresses on envelopes. This can be convenient for small number of envelopes; but as most laser printers require you to feed envelopes in by hand, printing large numbers of envelopes can be a slow business.
To print envelopes by using the Mail Merge command

1. Select Tools → Mail Merge to fire up the Mail Merge Helper.

2. Click the Create button to drop down a list of options and select Envelopes from this drop-down list.
3. Arrange the data source as usual. Then click the Mail Merge Helper button on the Mail Merge toolbar and under Main document, choose the Set up button. In the Envelope options dialog box that appears, make the appropriate choices for your envelopes.
    On the Envelope options tab, click the font button in the Delivery Address box or the font button in the Return Address box to change the font in which the addresses appear. You can also adjust the position of the delivery address or return address by entering from Top and from Left measurements in their boxes.
    On the Printing Options Tab, select the feed method and the tray to feed from.
4. Choose OK to close the dialog box.
5. Next, the Envelope Address dialog box appears. Position the insertion point in the Sample Envelope Address box. Then choose the Insert Merge Field button and choose the appropriate merge fields. Type any spaces and punctuation you want between the merge fields, and press ENTER at the end of each line. Choose the OK button to close the Envelope Address dialog box.
6. In the Mail Merge Helper dialog box choose the Edit button under main document and then choose Envelope document from the list. Word displays the envelope main document in Page Layout view. If the user Info Tab in the Option dialog box (Tools menu) has an address specified in the Mailing Address box, then that address is used as the return address.
7. Check whether your printer is ready to print envelopes. Then click the Merge To Printer button on the Mail Merge toolbar.

Printing Labels on Laser Printers

The Mail Merge Helper makes merging labels on a laser printer deal simple. You use the Mail Merge Helper to create a main document containing a table with fixed-size cells and cell spacing that match the size and position of your blank labels, then insert merge instructions in each table cell.

1. Select Tools → Mail Merge to fire up the Mail Merge Helper.
2. Click the Create button to drop down a list of options.
3. Select Mailing Labels from the drop-down list.
4. Arrange the data source as usual. Word will then invite you to set up your main document. In the Label Options dialog box that appears, make the appropriate choices for your printer and labels:
5. In the Printer Information box, select Laser or Dot Matrix as appropriate.
6. When you've chosen the labels to use, choose OK to close the dialog box.
7. The Create Labels dialog box will appear. Position the insertion point in the Sample Label box. Choose the Insert Merge field button and choose the appropriate merge fields. Type any spaces and punctuation you want between the merge fields and press ENTER at the end of each line.
8. Open the Mail Merge Helper dialog box and choose the Merge button to merge your data source with the main document. Choose whether to merge to new document or to the printer. (You can also use the Merge to New Document and Merge to Printer buttons on the Mail Merge Toolbar here).
9. Save your documents with meaningful names.

4.3 MACROS

This section introduces you to Macros in Word.

4.3.1 What are Macros?

A Macro is a series of Word commands grouped together as a single document to make everyday tasks easier. It can be assigned to a toolbar, a menu, a shortcut key and run it by simply clicking a button, selecting a menu choice or pressing a key combination. Macros are instructions in Word's macro language, Word Basic.
Some typical uses of Macros are:

To speed up routing editing and formatting.
To combine more than one command.
To make an option in a dialog box more accessible.
To automate a complex series of tasks.

4.3.2 Recording a Macro

It's easy to create a Macro: you start the Word macro recorder and record a sequence of actions, then stop the recorder and edit the macro if needed. You can then run the macro whenever you need to perform that same set of actions. For example, if you often need to display as much of a document as possible, you can record a macro that maximizes the document window and then hides the horizontal ruler, toolbars and scroll bars.
The macro recorder cannot record mouse actions in document text. You must use the keyboard when recording such actions as moving the insertion point and selecting text. However, you can use the mouse to choose commands and select options when you're recording a macro.

There are three ways to start the macro recorder:
Double-click REC on the status bar.
Select Tools→Macro, then click the Record button in the Macro dialog box.
Click the Record button on the Macro toolbar.

To Record A Macro

1. Start the macro recorder by selecting any of the three options described earlier. The Record Macro dialog box appears.
2. Enter a name for the Macro in the Record Macro Name box. If you don't give your macro a name, Word will name it Macro1, Macro2 and so on. No spaces, commas, or period allowed in the name.
3. Enter a description of what the macro does in the Description box. This is optional and you can use upto 255 characters.
4. To assign a macro to a toolbar, a menu or a keyboard shortcut, click the appropriate button.
5. If the current document is attached to a template other than the Normal template, select either that template or Normal in the Make Macro Available to box. If the current document is attached to the Normal template the macro is automatically stored in the Normal template.
6. Choose OK, then perform the actions you want to record.
7. To stop recording the macro, do one of following:
   - Double-click REC on the status bar.
   - Click the stop button on the Macro Recorder toolbar.

Running A Macro

Once you have recorded your macro, you can assign it to a toolbar, a menu or a shortcut key combination. You can then run it as you would a normal Word command or feature.
If you don't want to assign a macro to a toolbar, or key combination-perhaps you simply have too many macros, or use some of them too seldom to merit having them available all the time,-you can also run a macro by choosing ToolsMacro, selecting the macro name in the Macro dialog box, and clicking the Run button.
If you've got everything right, your macro will perform the actions you taught it to do. If something is wrong, you may have to edit it.

4.3.3 Editing & organizing A Macro

You can edit macros you write or record in a macro-editing window. To edit a macro:

1. Choose Macro from the Tools menu.

2. Select the list of macros you want to choose from, in the Macros Available In box.
3. Select the macro you want to edit and then choose the Edit button.

Word new Organizer dialog box greatly simplifies managing your macros. You can use it.

1. To Copy Styles, AutoText entries, toolbars, or macros to the attached template from another template.
2. To Rename a macro
3. To delete a macro.

Copying, Renaming or Deleting A Macro

The Organizer dialog box can be used to manage your macros by copying them into different templates or renaming them.
You can copy styles, AutoText entries, toolbars, and macros from one template to another. You can copy styles between templates and documents, but you can copy macros, AutoText entries and toolbars only between templates.

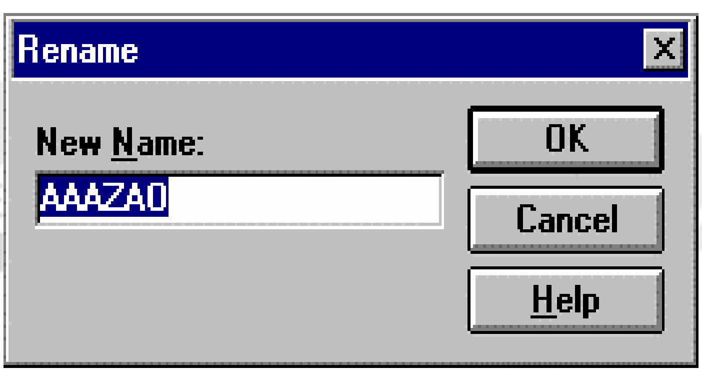
To copy macros from one template to another:

1. Select File→Templates. The Templates and Add-Ins dialog box will appear.
2. Click the Organizer button to display the Organizer dialog box.
3. Choose the Macros tab.
4. If necessary, close the open file, select the Open file button, and open the template or document containing the macro.
5. Select the macro you want to copy, then choose the Copy button.
6. Click the Close button when finished copying macros.

Renaming A Macro

You can use the Organizer dialog box to manage your macro by renaming them.

The steps to rename a macro are:
1. Select Tools→Macro. The Macro dialog box will appear.
2. Click the Organizer button. The Organizer dialog box will appear with the Macros tab selected.
3. In the left list box, choose the macro to rename. If necessary, choose a different template in the Macros Available In list box.
4. Click the Rename button. The Rename dialog box will appear:



5. Entering a new name for the macro and click OK. The macro will be named.

4.3.4 Assigning Macros To A Menu, Toolbar And Shortcut Keys

This subsection gives the detailed of how a macro can be assigned to a menu, a toolbar and shortcut keys.

Assigning a macro to menu:

1. From the Tools menu, choose Customize.
2. Select the Menus tab.
3. In the Categories box, select Macros.
4. In the box to the right of the categories box, select the macro name to be assigned to a menu.
5. In the Change What Menu box, select the name of the menu to which you want to assign the macro name.
6. In the Position On Menu box, do one of the following:
   a) Select (Auto) to automatically position similar menus together, or
   b) Select (At Top) or (At Bottom) to position the macro at the top or bottom of the menu or
   c) Select the item below which you want to add the new item to position the item within the menu list.
8. In the Name On Menu box, accept the default name or type the name of the macro you want to appear on the menu.
9. Choose the Add button and click the Close button.

Assigning A Macro To A Toolbar Button

You can customize Word toolbars so that they contain buttons for the macros:

Follow the following steps for this:

Choose Customize→Tools.
1. Select the toolbars tab from the Customize dialog box.
3. In the Categories box, select Macros and choose the macro name to be assigned.
4. From the box to the right of the categories box, drag the macro name to the toolbar you want to add it to. As Macros don't have built-in button, a blank button appears on the toolbar and the custom button dialog box appears.
5. In the button box, select an image to place an image on the blank button.
6. Choose the Assign button and then the Close button.

Assigning Macro to a Shortcut Key

The steps followed to assign to a shortcut key are:

1. Choose Customize→Tools.
2. Select the keyboard tab.
3. In the Categories box, select Macros.
4. In the box to the right of the Categories box, select the macro name to be assigned.
5. In the Press New Shortcut key box, type the shortcut key you want to assign to the macro.
6. Choose the Assign button and Close button.

Check Your Progress 1

While using the data from other applications in the data source file,

i) the records must contain multiple fields
ii) the merge fields in the documents must match those in the data source
iii) you must first click the Create Data Source button
iv) none of the above

2. The Date and Time command

i) Inserts the date and time you can specify
ii) Automatically adds the current date and time
iii) Shows the date a file was created
iv) Shows the date a file was last revised

3. The View Merged Data button

i) Allows you to view all the records in the data source file
ii) Allows you to insert records into the main document
iii) Allows you to view how the form letter will appear
iv) Allows you to select the records to be merged

4. The Macros can be assigned to a toolbar, a menu or shortcut keys by using

i) the Options command in Tools menu
ii) the Macro command in the Tools menu
iii) the Customize command in the Tools menu

4.4 Protecting Documents

The major file management operations include creating, opening, saving, restoring and protecting documents. This detail about creating, opening and saving the documents have been explained earlier in unit 1. This section mainly deals with protecting documents.

Protecting a document

Protecting a document implies saving it from being changed either accidentally by some other user. A document can be protected in two ways:

1. Opening a document as read only.
2. Protecting a document with a password.

1. When a document is opened as read-only, the user cannot make any changes to the document. This can be achieved by selecting the read-only check box in the Open dialog box. This read-only option will not allow any changes in the document to be saved.
2. The other way to protect a document is to use the Protection Password, which is typed in the Protection Password box. In this way, the users who know the password can only open the document. These passwords can be changed and deleted too.

4.5 Printing a Document

While printing a document, you can:

1. Print the entire document or only specific pages.
2. Print summary information, annotations or list of styles, AutoText entries or key assignments.
3. Print a draft copy, which omits graphics to allow faster printing.

Set printing options, such as number of copies.

You can also automatically create and print an envelope, using an address from a document or one that you type. You can either print directly on an envelope or store the information so that you can print the envelope later.
The printers you can use affect the way Word prints and displays text on the screen. Before you print a document, you must install and select the printer you intend to use to print the document.

Word displays a document, as it will look when you print it. If you want to preview a document before you print it, use page layout view or print preview. In each of these views, you can make last minute changes to text formatting, page breaks and margins.

Line breaks and page breaks should be the same on the screen and in the printed document. However, the fonts and view options you choose can affect the match between what you see on the screen and what appears on the printed page.

Three kinds of fonts affect your work in Word: Scaleable fonts, Printer fonts and Screen fonts.
Use scaleable fonts, such as True Type fonts to ensure that what you see on the screen is what appears on the printed page.

For using printer fonts, you must have a corresponding screen font and font size to display each font on the screen. If each screen font you use has a matching printer font, the screen display of the document will closely match the printed document.

The three basic steps for printing a document are:

1. Connecting the Printer:
   Connect the printer either directly to your computer or to a network.

2. Selecting the Printer:
   Choose Print from the file menu then choose the Printer button and select the printer you want to use.

3. Printing the Document:
   Click the Print button on the Standard toolbar. In Windows, Word prints one copy of the active document using the word default print settings.

Check Your Progress 2

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1. To prevent other users from opening a document which of the following should be clicked in the options command in Tools menu

i) Protection Password box
ii) Write Reservation Password box
iii) Read-only Recommended box
iv) Either (ii) or (iii)

2. While Saving a document, a filename without the extension can have maximum of

i) 15 characters
ii) 11 characters
iii) 8 characters
iv) 10 characters

3. List the steps followed for finding a document based on the search criteria.

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4.6 Summary

Mail Merge has an advanced feature of printing envelopes and labels. This feature is not present in the Mail Merge feature of WordStar Macros in Word can be assigned to menu, keyboard-shortcut keys or toolbar. This can make the operation of the macro made faster and easier. We have also discussed the steps involved for protecting and printing documents.

4.7 MODEL ANSWERS

The questions given in the 'Check Your Progress' have been designed only at the conceptual level and the answers to these questions are directly available in the unit. Therefore, Model Answers have not been provided. However, as this block is more practical oriented, therefore, students are advised to try the commands given, on their terminals.