MS-Word

Week 3

Official resource for MS-Office products: https://support.office.com

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Activities In Tutorial

- TA demos:
  - Used for more complex features (typically multiple steps are required).
  - The tutorial instructor will show on the projector/instructor computer each step for running the feature in Word.
- Student exercises:
  - Used instead of TA demos for simpler features.
  - You will have already been given a summary of how to invoke the feature and the purpose of the exercise is to give you a chance to try it out and get help if needed.

# Master-Subdocuments: Student Exercise

- Create two Word documents that will act as subdocuments.
  - Add some text to that you can recognize when they have been added to the master.
  - Insert a reasonably large image into one of the documents to increase the file size.
- Create a third Word document that will act as the master document.
  - Insert (links to) the subdocuments in the master document
  - Save and close the master document.

Master-Subdocuments: Student Exercise (2)

- (In Windows) examine the file size of the master document and the subdocument with the image.
  - There's different ways of determining file size, but two ways include:
    - Mousing -over each document until the information appears
    - If that doesn't work after a few seconds right click on each document to see it's properties.
  - The master document should be smaller than the sub-document.
  - This should convince you that the master document **does not** directly contain the subdocuments.
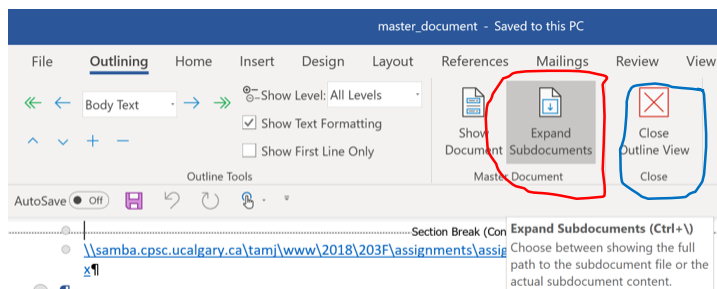
Master Document: Reopening

- You won't see the contents of the subdocuments, instead you will only see a link to the subdocument (location will vary depending upon where you store the documents on your computer).
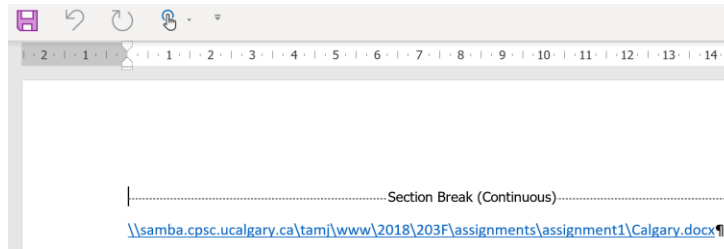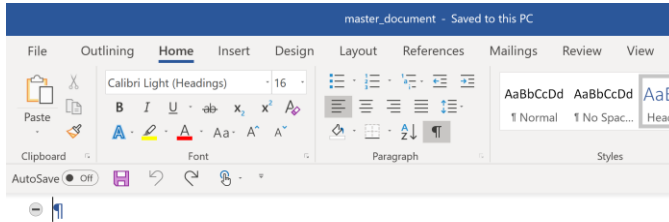

Master Document: View Contents Of Subdocument

- To view the contents
  - `View->Outline->`**`Expand Subdocuments`**

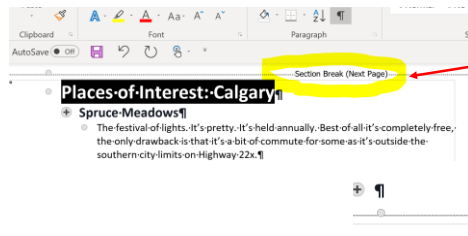 - **Close the outline view** to get a normal view of the document.

Be Aware: Additional Formatting Is Added

- Master document: before inserting subdocument

- After the insertion

Additional section breaks are automatically inserted at the start and end of the sub-document

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Master-Subdocuments: Part II Of Student Exercise

- (Back to using Word) open the master document.
  - Go through the steps needed so you can see the contents of the sub-documents (via expand).
  - Notice how the extra section breaks have been added to separate the contents of each subdocument.

## Another Reminder: Transporting Master-Subdocuments

- Because master documents do not contain the contents of subdocuments when **submitting your work for assignments** you need to **include the master document and all the subdocuments**.
- If just the master document is submitted then the marker will not be able to see the subdocuments and cannot provide you with any credit for any work done on them.
  - Again: make sure you do it right before the due date, no do-overs afterwards.
  - You can check your work by downloading what you submitted and opening the documents.
    - Do the check on a different computer (best to try a campus computer or a different campus computer because sometimes your own computer may have local links that won't work for your marker).

Mail Merge

- This feature can be used to create customized documents that are based on a starting template e.g. emails, letters, mailing labels etc.
- Inputs to the merge:
  - "Original main document" a Word document that provides the starting template for the parts of the document that will be same e.g. "Sincerely: Peter Griffon" for a letter.
  - "Data source" contains information for the parts that will be customized e.g. Excel spreadsheet, Access database etc.

What You Get From The Merge

- Outputs of the merge:
  - Default output (this is what you will **submit for the assignment**)
    - The original main document will contain the customized documents.
    - You can 'click' through all the different letters and see how the main document has been customized.
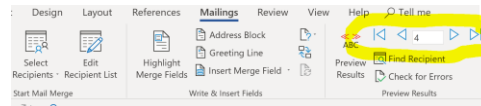
    - Changes can be made in the customization.

What You Get From The Merge (2)

  - Optional output:
    - Generated if you select "finish and merge"
    - Creates a new Word document that only contains the customized results (e.g. the sequence of customized letters that can be printed or sent).
    - Only the individual letters can be customized.
      - Looks the same as manually typing all the individualized letters (which is why it won't merit any credit because it doesn't demonstrate mastery of the mail merge feature).
    - Not needed for assignments.

Mail Merge Example: TA Demo

This will be different from lecture: The wizard will not be used

- Example files can be found in the tutorials link for this week under the subfolder 'mail_merge_example'
- Since this is a longer multi-step process, students can download this example from the tutorial portion of the course website and follow along as the tutorial instructor works through the process.
  - There will also be student exercise to follow:
- Contents of this folder:
  - Original main document (Word document): form_for_creating_recommendations-ORIGINAL
  - Data source (Excel spreadsheet): students

Original Main Document

CUSTOMIZATIONS FROM THE MERGE

I am writing this recommendation for . This person was a student of mine and completed the following degree:
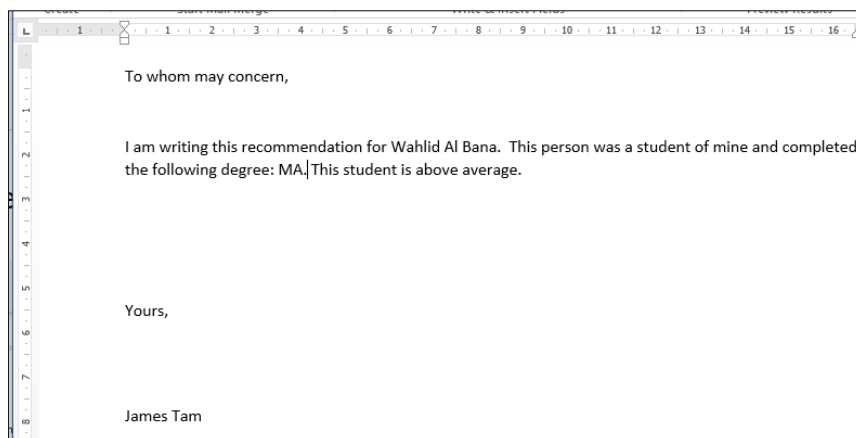
Yours,

James Tam

1) Salutation

2) Student name

3) Qualifications

4) Extra endorsement (GPA 3.0 and above)

Data Source

◢	A	B	C	D
1	**Last name**	**Given names**	**Degree**	**GPA**
2	Smith	Jon	BA	2.3
3	Chan	Mary	BA	2.51
4	Long	Thanh	BA	2.99
5	Al Bana	Wahlid	MA	4

Example Customized Letter

To whom may concern,

I am writing this recommendation for Wahlid Al Bana. This person was a student of mine and completed the following degree: MA. This student is above average.

Yours,

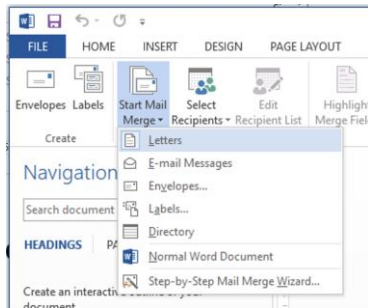James Tam

Starting The Mail Merge

- (In this case the original main document and the data source has already been created, normally you would have to create those yourself).
- Open the original main document in Word.
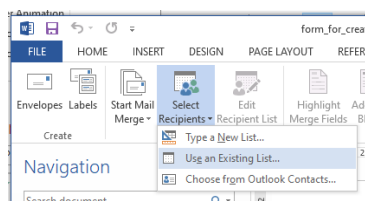- Select: `Mailings tab->Start Mail Merge->Letters`

Mail Merge: Select The Data Source

- Similar to the step when using the Wizard this allows you determine where the customized data comes from:
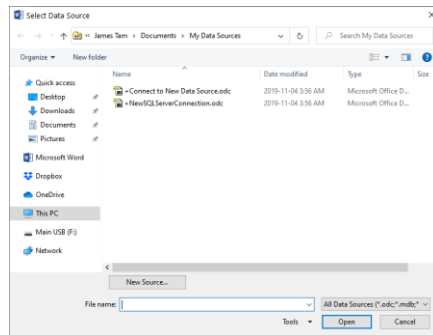 - `Mailings -> Start Mail Merge: Select Recipients`
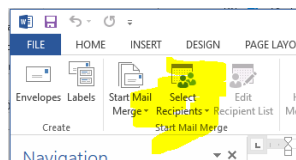
 - From there select the `'Use Existing List'` option.

Mail Merge: Select The Data Source (2)

- Now you have the ability to navigate to the location where the data source (in this case it's the '`students`' Excel file) is located.
  - Complete the other steps for selecting the data source as you would when using the wizard.

Mail Merge: Insert The Student Name

- Click on the line containing the text "`I am writing this recommendation for .`"
  - Click just in front of the period.
  - Insert the given name:
    - `Mailings -> Write & Insert Fields: Insert Merge Field`
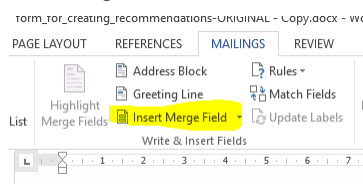
- Select '`Given names`' and click 'OK'
- Then 'insert' "Given names"
- AdFollow this by an 'insert' of "Last name"

Mail Merge: Insert The Student Name (2)

– Add a space after the inserted given name field to separate it from the last name.

> To whom may concern,
>
> SP
>
> I am writing this recommendation for «Given_names» I
> completed the following degree:

– Insert the last name in a fashion similar to how you inserted the last name (previous slide).

Mail Merge: Insert The Degree

- It's very similar to how you inserted the given and last names:
  – `Mailings -> Write & Insert Fields: Insert Merge Field`
  – (Select the 'Degree' field this time).
  – Insert the degree at the end of the letter after the space which follows the text "This person was a student of mine and completed the following degree:"

> To whom may concern,
>
> I am writing this recommendation for «Given_names» . This person was a student
> completed the following degree: «Degree»

– After inserting the degree add a period after the degree.

Mail Merge: Include A Conditional Endorsement

– Students whose GPA is 3.0 or greater will have the text "`This student was above average.`" added to the end of the letter (after the degree).

– Click two lines below the text "This person was a student of mine and completed the following degree: "

– Select under the 'Mailings' tab: `Write & Insert Fields group: Rules->IF-THEN-ELSE`
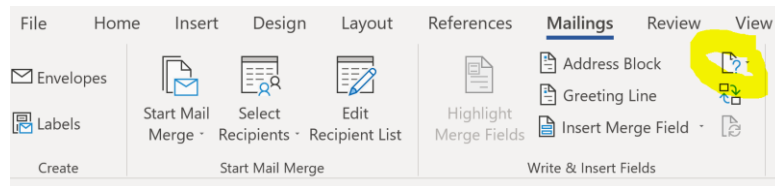
# **Mail Merge**: Include A Conditional Endorsement (2)

• Include a conditional endorsement (continued)
  – A popup dialog box comes up
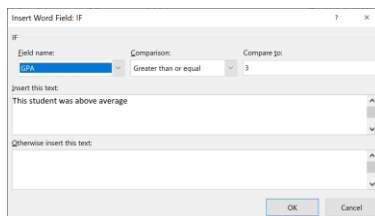
– Under the "Field name" option select "GPA"
– Under the "Comparison" option select "Greater than or equal"
– Type '3' into the "Compare to" field
– Type 'This student is above average.' in the "Insert this text" field
– (Leave the "Otherwise insert this text" field blank.

Mail Merge: Checking Results

- You can see the individual results under:
  - Mailings tab-> Preview Results: Preview results (and then click forward or backward)
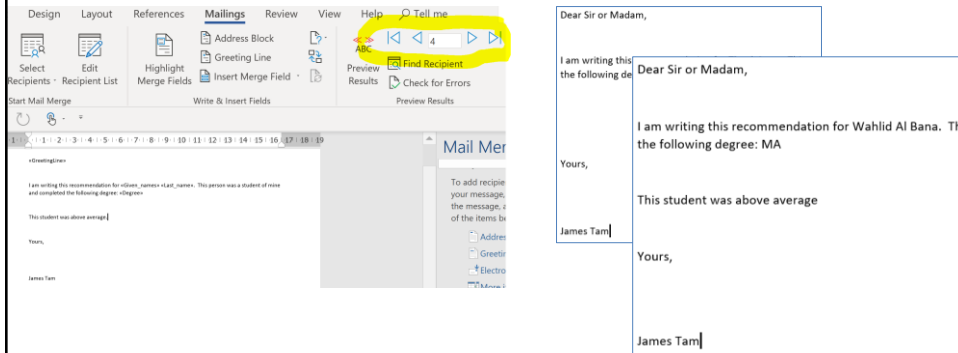
Mail Merge: Do Not Finalize The Process For Any Assignments (If Applicable)

- "Finish and Merge" can be used in 'real life' to produce a Word document that contains all the merged letters (for printing or emailing).
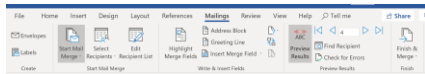
- However, if you only submit the finalized the document there is no way that the marker can tell that you actually performed a mail merge.
  - The different letters cannot be "clicked through" (previous slide).
  - (The results could have been produced by simply typing the results into Word).
  - To see the result of the finished document using this example see: incorrect_finish_and_merge_document

Opening A Word Document Using Mail Merge

- Because the Word document is connected to another document you will get a prompt each time that you open it.
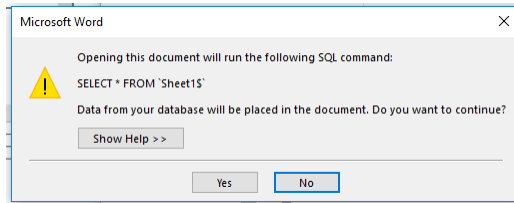
 — Just select "Yes"

Mail Merge: Student Exercise

- In the folder "Student_mail_merge_exercise", use the following files:
  - Original main document (Word document):
    mail_merge_student_exercise-ORIGINAL

	A	B	C	D	E
1	Course name	Course number	Semester	Year	Instructor
2	HIST	393	Fall	2001	MJ Osler
3	PSYC	205	Fall	2001	D Klien
4	MATH	221	Fall	2001	T Dihn
5	ASTR	205	Fall	2001	TA Clarke
6	CPSC	203	Fall	2001	J Tam
7	HIST	395	Winter	2002	MJ Osler
8	SOCI	201	Winter	2002	S Reid
9	CPSC	217	Winter	2002	B Stephenson

Mail Merge Student Exercise

- Open the Word document and use it as the starting template

  ‹ · 1 · 1 · 2 · 1 · 3 · 1 · 4 · 1 · 5 · 1 · 6 · 1 · 7

  What I think about the following courses.

  The course: taught by .

- Using the mail merge add the following in the merged letters. Don't use the Wizard!

  "To whom it may concern"

  e.g. CPSC 203

  ‹ · 1 · 1 · 2 · 1 · 3 · 1 · 4 · 1 · 5 · 1 · 6 · 1 · 7 · 1 · 8 · 1 · 9 · 1 · 10 · 1 · 11 · 1

  «GreetingLine»

  What I think about the following courses.

  The course: «Course_name»«Course_number» taught by «Instructor».

  A UC course.|

  Text varies:
  - For 'CPSC' courses = Highly recommended!
  - For all others = A UC course.

  e.g. J Tam

Resources For The References Examples

- Example files can be found in the tutorials link for this week under the subfolder 'references_4_Word'

Table Of Contents

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 |

Table of Contents

Dubai: stark contrasts 2

Dubai: Burj Al Arab... 3

Paris: Eiffel tower 4

Egypt: Cairo 5

- Document to use for this example:
  - Word document: `World`
- In Word
  - `References tab->Table of Contents->(Select the type of table:` For A1 it's "Automatic Table 2")
- Student exercise:
  - Insert an "Automatic Table 2" into the World document.

Citations

- Can be used to attribute credit to a quote.
- Document to use for this example:
  - Word document (you can use it to create a master): `the_hobbit`
- Steps:
  1. Enter the information for the citation.
  2. Refer to the citation in the document.

Citations

- **Step 1: Create the citation** (enter information regarding the source or citation)

- Creating citation in Word:
  - `References->Citations & Bibliography group: Insert Citation->Add New Source`
- (If you need to change the citation later):
- `References-> Citations & Bibliography group: Insert Citation->Manage Sources->Select the citation->Edit`

Citations (2)

- **Step 2: Using or referring to the citation**
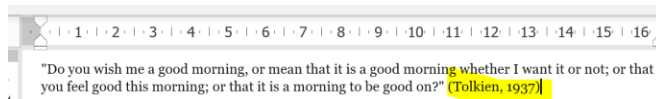
- Navigate to the location in Word where the citation will be located
- Insert the citation at that location:
  - `References-> Citations & Bibliography group: Insert Citation->`(Select the citation source from the list)
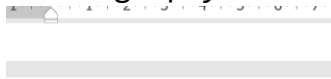
Citations (3)

- Student exercise, step 1: creating the citation
  - Author: Tolkien, J.R.R.
  - Title: The Hobbit
  - Year: 1937
  - Publisher: Stanley Unwin
- Student exercise, step 2: using/inserting the citation
  - Insert the citation after the quote

    "Do you wish me a good morning, or mean that it is a good morning whether I want it or not; or that you feel good this morning; or that it is a morning to be good on?"

Bibliographies

- Using the same Word documentation, a bibliography can be added from the newly created citation.
- `References-> Citations & Bibliography group: Bibliography`

  Bibliography
  Tolkien, J. (1937). *The Hobbit.* Stanley Unwin.

- Student exercise:
  - At the end of the document insert a page break
  - Insert a new citation for the book.

Figure Captions

- Allows the **figure captions** to be tracked and updated (as necessary) by Word.

Figure 2

- Also allows references to the figures ("cross references") to be tracked and updated by Word.

oot). The picture (Figure 1) is
one that offers skiing (Mall of

Figure Captions

- First part: creating the caption
  - References tab->Caption group: Insert caption
- Second part: adding caption as a cross reference
  - References tab->Caption group: Insert cross reference
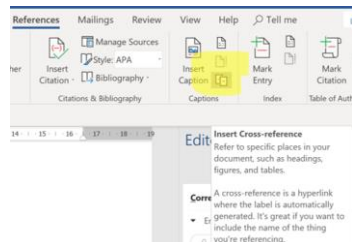
Student Exercise: Figure Captions

- Starting document: `World`
- Delete the image Figure 2 and the caption.

Student Exercise: Figure Captions (2)

- On Page 1 insert a cross reference to Figure 1.

artificially generated sub-freezing ski resort (inside a shopping mall to boot). The picture (Figure 1) from the mall with in the indoor aquarium (Dubai mall) rather than the one that offers skiing (Mall Emirates) but I thought that this is a much cooler picture.

Figure 1

- Update the captions:
  - Select the entire document.
  - Right click (without losing the selection) select "Update field".
  - (The images of Dubai and the pyramids should now be captioned as Figure 2 & 3 respectively).
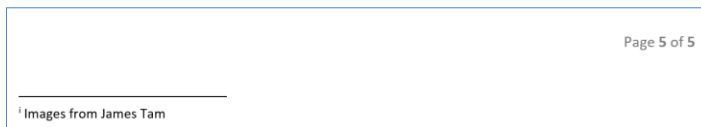
Footnotes & Endnotes

- Footnotes are added to the bottom of the current page.
  - References tab->Footnotes group: Insert Footnote
- Endnotes are added to the end of the current document.
 - References tab->Footnotes group: Insert Endnote
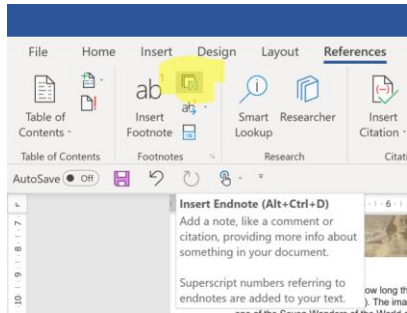
Student Exercise: Endnote

- Using the 'World' document insert an endnote: "Images from James Tam"

Tracking Changes

- Word can be used to track changes made to a document.
- The changes are tracked and graphically illustrated <u>after</u> Word has been instructed to "Track changes".
  - `Review tab->Tracking->Track Changes`
- Choosing the level of detail for illustrating changes made to the document:
  - `Review tab->Tracking->All markup option and then` <u>`select level`</u> `(All markup, Simple markup, No markup)`
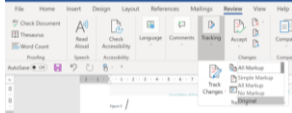
  - Reviewing and accepting or rejecting changes:
  - `Review tab->Changes group->Accept (then select among options to accept or reject)`

Tracking Changes: Level Of Detail

- Changes made to the 'World' document.
  - '50' deleted
  - '49.5' added
  - Aquarium image (of Dubai) deleted

Tracking Changes: Level Of Detail (2)

- All markup

Where else can people be sweating it out in +49.550 C
in an artificially generated sub-freezing ski resort (insid
the mail with in the indoor aquarium (Dubai mall) rath
Emirates) but I thought that this is a much cooler pictu

- No markup

Where else can people be sweating it out in +49.5 C
an artificially generated sub-freezing ski resort (insid
mail with in the indoor aquarium (Dubai mall) rathe
Emirates) but I thought that this is a much cooler pi

Figure 1

- Simple markup

Where else can people be sweating it out in +49.5 C
an artificially generated sub-freezing ski resort (insid
mail with in the indoor aquarium (Dubai mall) rathe
Emirates) but I thought that this is a much cooler pi

Figure 1

Copyright Notification

- "Unless otherwise indicated, all images in this presentation were created by James Tam."