

# MS-Word

## Week 3

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

## 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

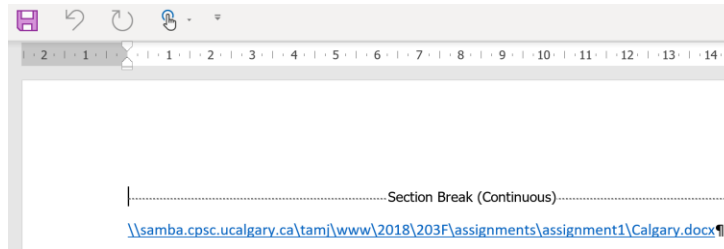
- Create two Word documents that will act as subdocuments.
  - Add some text to that you can recognize when they have been added to the master.
  - Insert a reasonably large image into one of the documents to increase the file size.
- Create a third Word document that will act as the master document.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

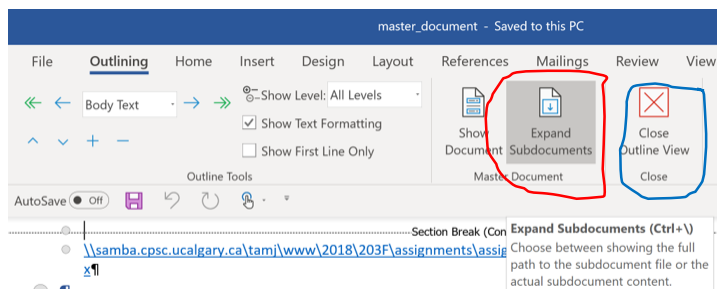
## Master Document: Reopening

- 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

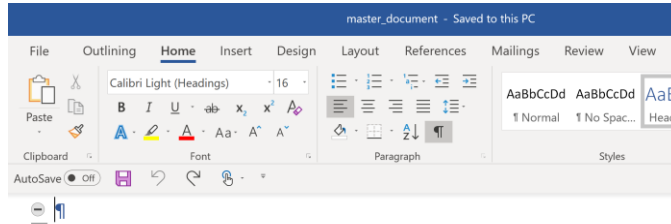
- To view the contents
  - View->Outline->**Expand Subdocuments**



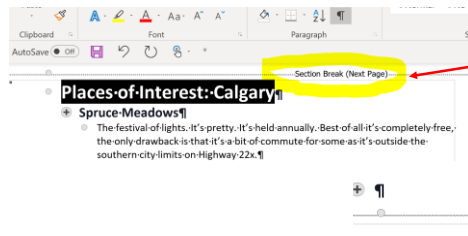
- **Close the outline view** to get a normal view of the document.

## 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**

## 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 subdocuments (via expand).
  - Notice how the extra section breaks have been added to separate the contents of each subdocument.

## Another Reminder: Transporting Master-Subdocuments

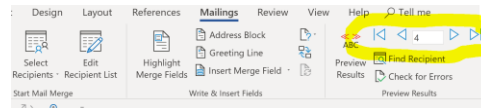
- Because master documents do not contain the contents of subdocuments when **submitting your work for assignments** you need to **include the master document and all the subdocuments**.
- If just the master document is submitted then the marker will not be able to see the subdocuments and cannot provide 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.
- In general for mail merge what's needed 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' and the subfolder 'first\_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

The screenshot shows a Microsoft Word document with a ribbon at the top. The text in the document is as follows:

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

Yours,

James Tam

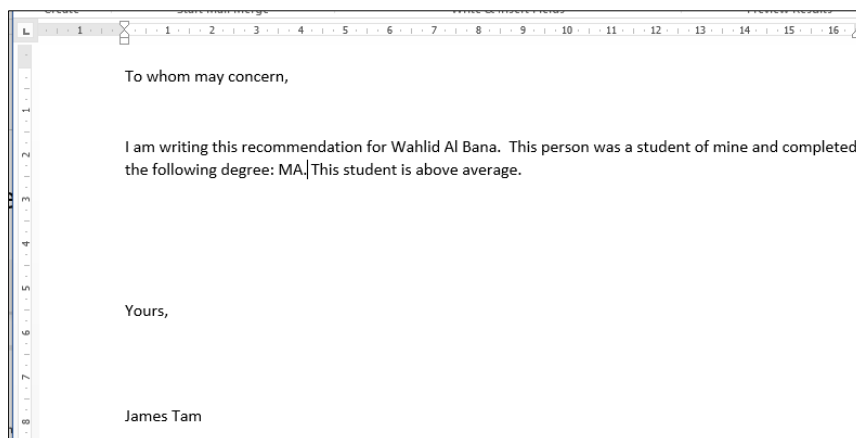
Four blue callout boxes with arrows point to specific parts of the text:

- 1) Salutation: Points to the word "Yours,"
- 2) Student name: Points to the underlined text "this person"
- 3) Qualifications: Points to the text "was a student of mine and completed the following degree:"
- 4) Extra endorsement (GPA 3.0 and above): Points to the text "this person"

## Data Source

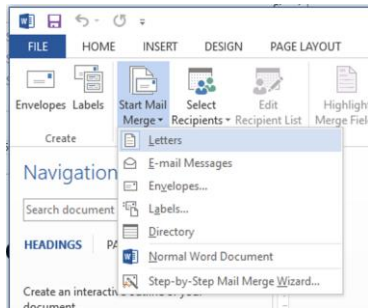
	A	B	C	D
1	<b>Last name</b>	<b>Given names</b>	<b>Degree</b>	<b>GPA</b>
2	Smith	Jon	BA	2.3
3	Chan	Mary	BA	2.51
4	Long	Thanh	BA	2.99
5	Al Bana	Wahlid	MA	4

## Example Customized Letter



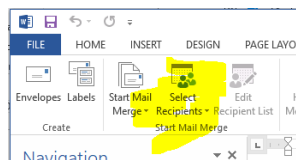
## Starting The Mail Merge

- (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

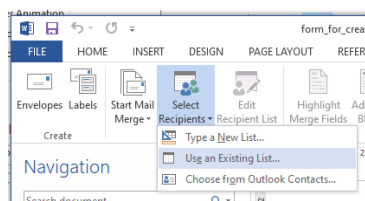


## Mail Merge: Select The Data Source

- Similar to the step when using the Wizard this allows you determine where the customized data comes from:
  - Mailings -> Start Mail Merge: Select Recipients

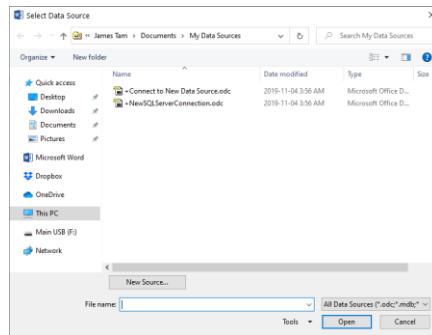


- From there select the 'Use Existing List' option.



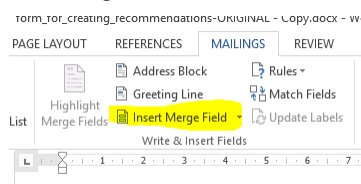
## Mail Merge: Select The Data Source (2)

- 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,

I am writing this recommendation for «Given\_names»  
completed the following degree:

SP  
↓

- 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:"

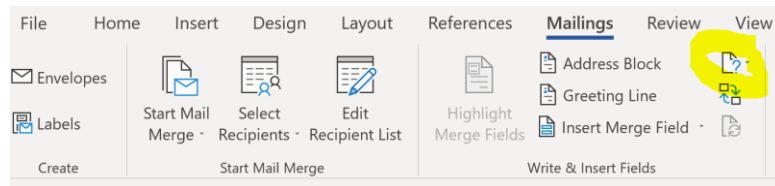
To whom may concern,

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)

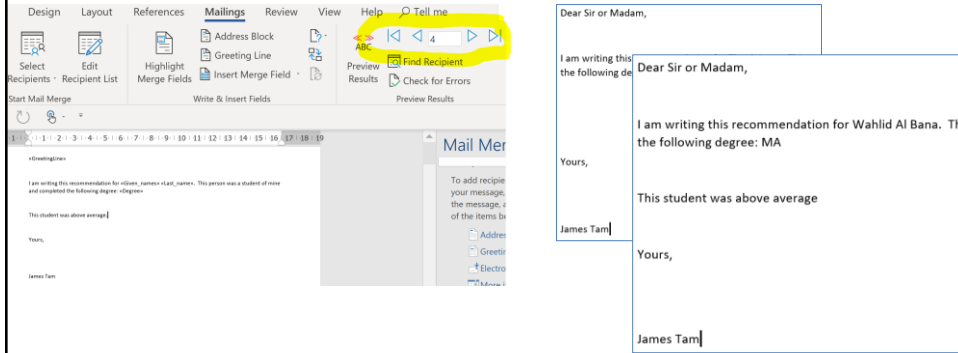
- Include a conditional endorsement (continued)
  - A popup dialog box comes up

 A screenshot of the 'Insert Word Field: IF' dialog box. The dialog has three main sections: 'Field name', 'Comparison', and 'Compare to'. The 'Field name' dropdown is set to 'GPA'. The 'Comparison' dropdown is set to 'Greater than or equal'. The 'Compare to' text box contains the number '3'. Below these fields is a text area labeled 'Insert this text:' which contains the text 'This student was above average'. There is also a section for 'Otherwise insert this text:' which is currently blank. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

- 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.

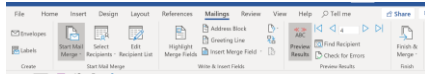
## Mail Merge: Checking Results

- 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)

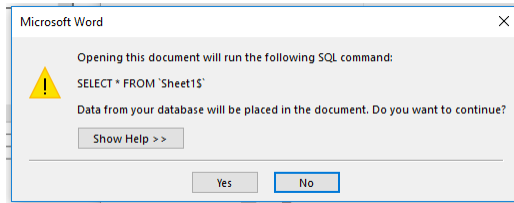
- “Finish and Merge” can be used in ‘real life’ to produce a Word document that contains all the merged letters (for printing or emailing).



- 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
  - **Data source** (Excel spreadsheet): courses

	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



What I think about the following courses.

The course: taught by .

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

Text varies:

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

«GreetingLine»

What I think about the following courses.

The course: «Course\_name»«Course\_number» taught by «Instructor».

A UC course.

"To whom it may concern"

e.g. CPSC 203

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



### 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.

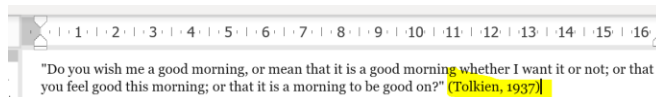
## Citations

- **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**



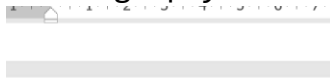
- Navigate to the location in Word where the citation will be located
- Insert the citation at that location:
  - References-> Citations & Bibliography group: Insert Citation->(Select the citation source from the list)

## 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.



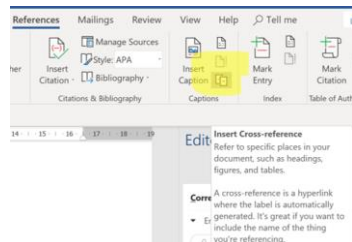
Figure 2

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

root). 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: Wor1d**
  - 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.

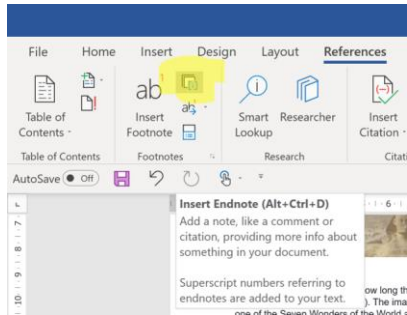


Figure 2

- 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).

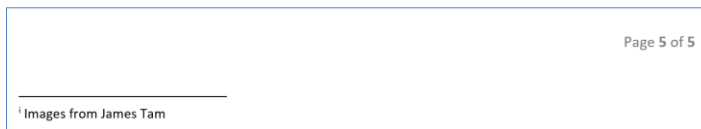
## Footnotes & Endnotes

- 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



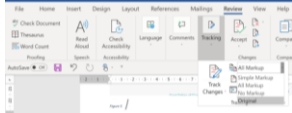
## Student Exercise: Endnote

- 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 after 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 select level (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



- No markup

Where else can people be sweating it out in +49.5 C  
an artificially generated sub-freezing ski resort (insic  
mall 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 (insic  
mall 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.”