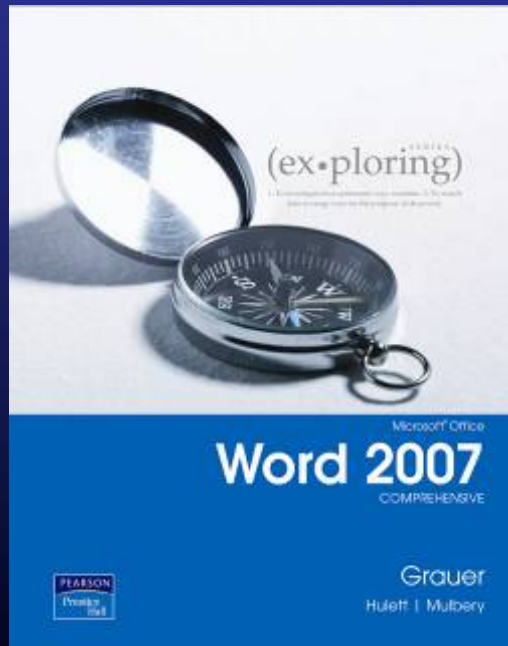


Exploring Microsoft Office Word 2007

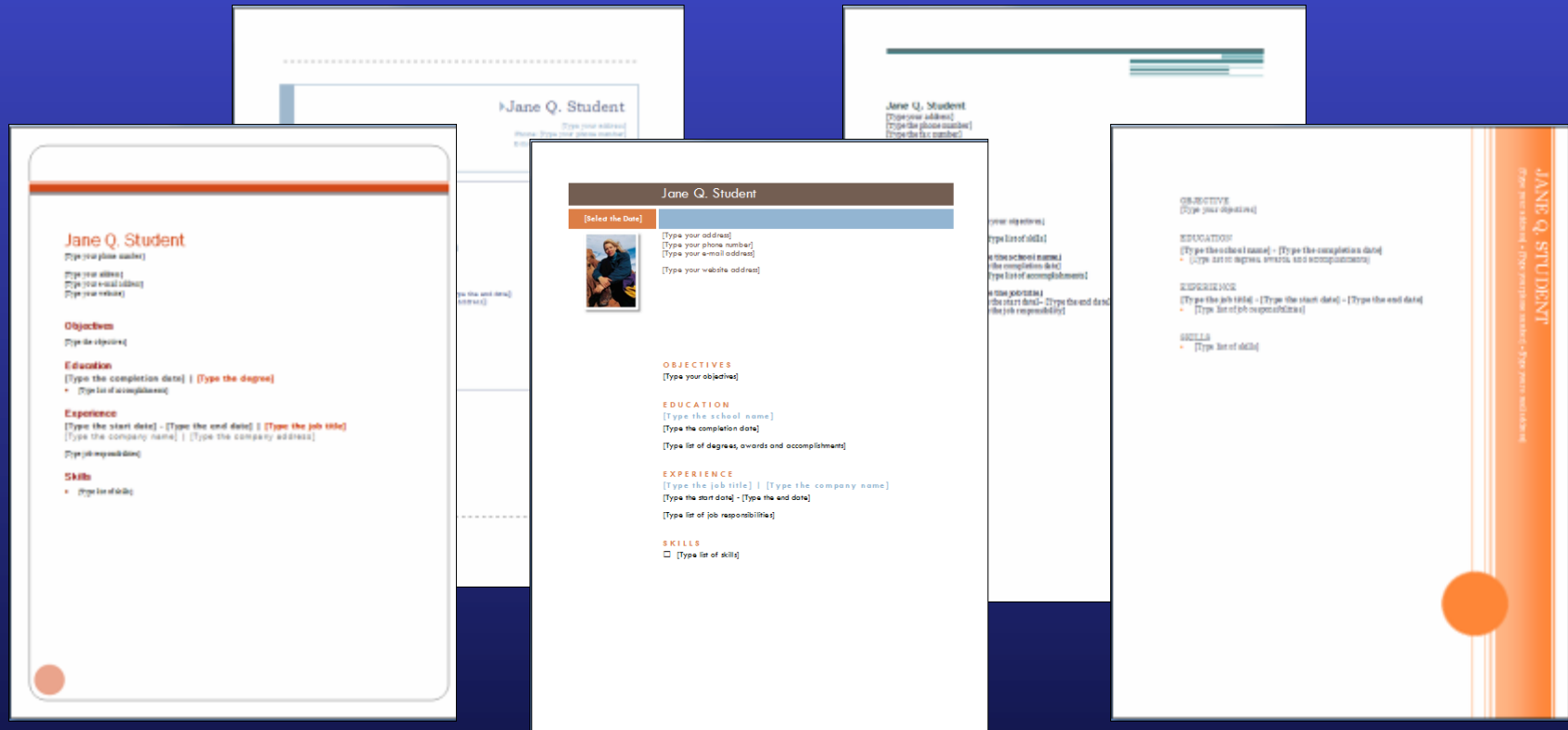
Chapter 5 Productivity Tools



Objectives

- Use a template
- Create a template
- Customize theme colors, fonts and effects
- Produce a merge document
- Select a main document
- Select or create recipients for a data source
- Sort records in a data source
- Use Excel or Access for a data source


Document Templates



- Templates are partially completed documents containing preformatted text and/or graphics

Why Use a Template

Pre-designed
elements



Jane Q. Student

[Select the Date]

[Type your address]
[Type your phone number]
[Type your e-mail address]
[Type your website address]

[Photo]

OBJECTIVES
[Type your objectives]

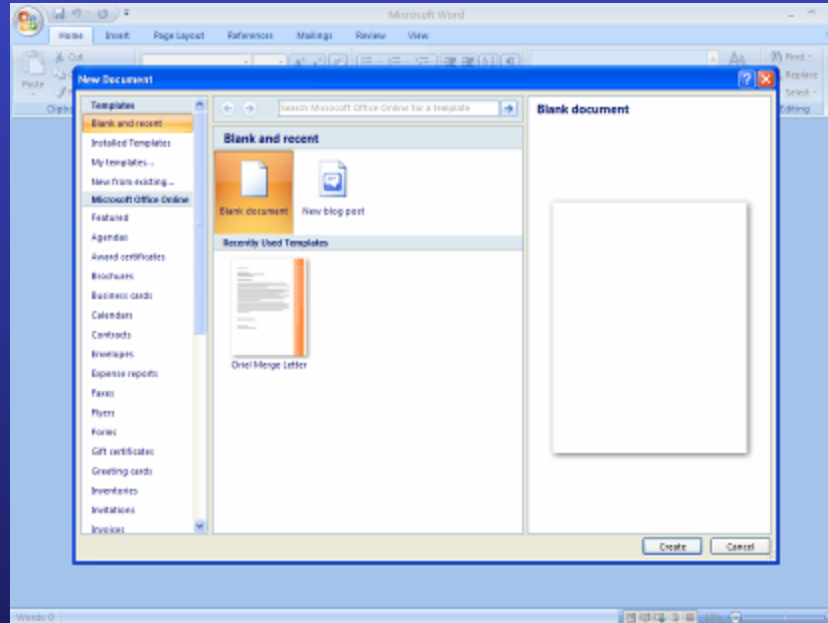
EDUCATION
[Type the school name]
[Type the completion date]
[Type list of degrees, awards and accomplishments]

EXPERIENCE
[Type the job title] | [Type the company name]
[Type the start date] - [Type the end date]
[Type list of job responsibilities]

SKILLS
☐ [Type list of skills]

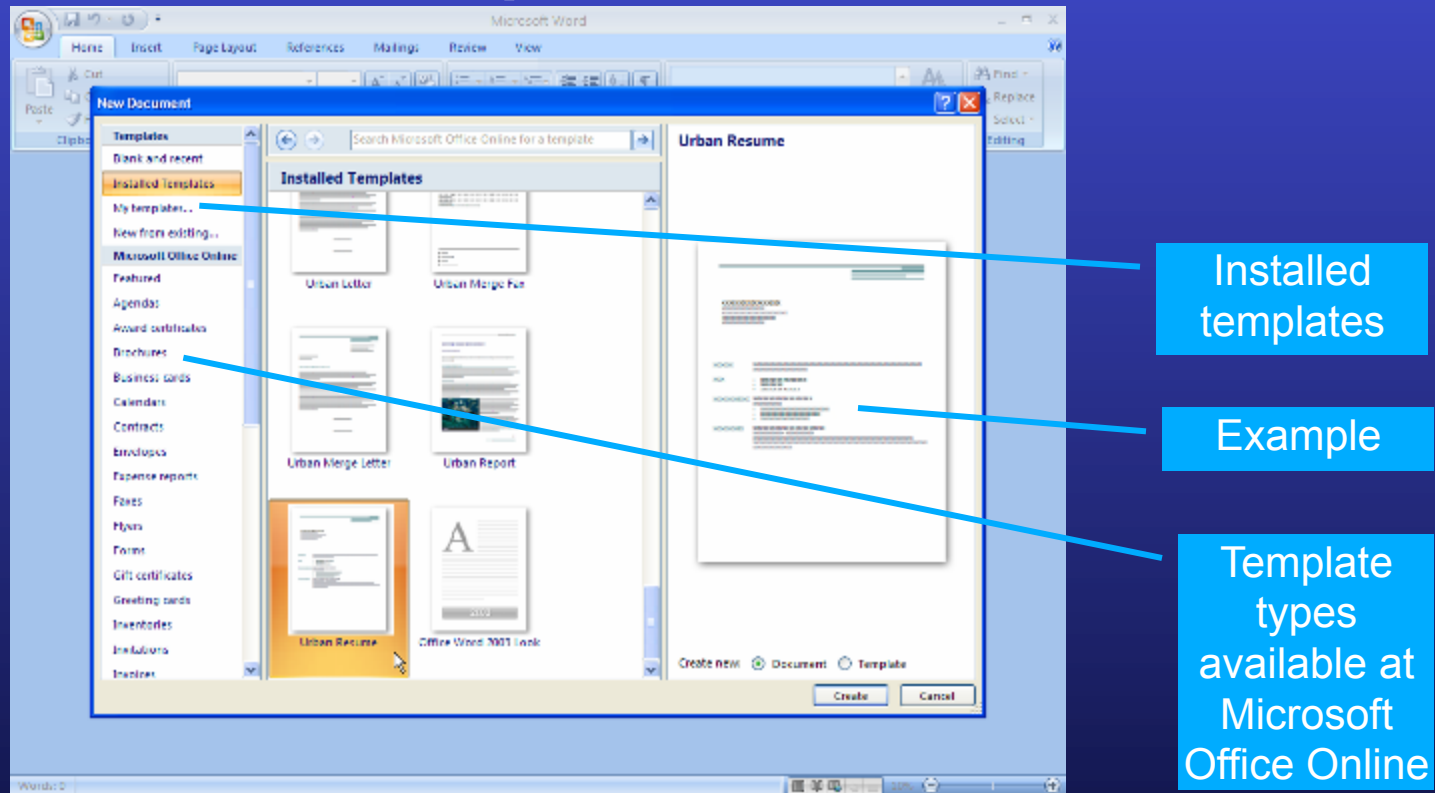
- Templates are pre-designed
- Templates may contain required information
- Templates require the user to save the document as a new file preserving the original design and information for future use

The Normal Template



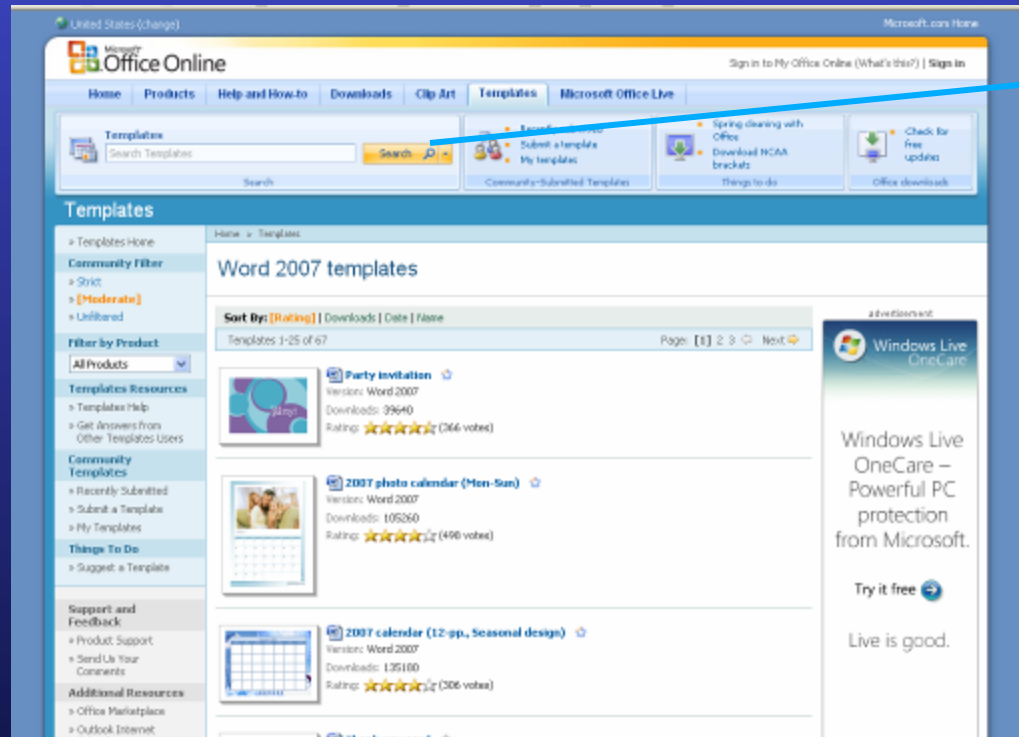
- Defines the default look of a Word document
- Is used when a blank document is selected

Select a Template



- Click the Office Button and then click New
- The New Document window displays available Templates

Templates at Microsoft Office Online



Search for
more
templates
online

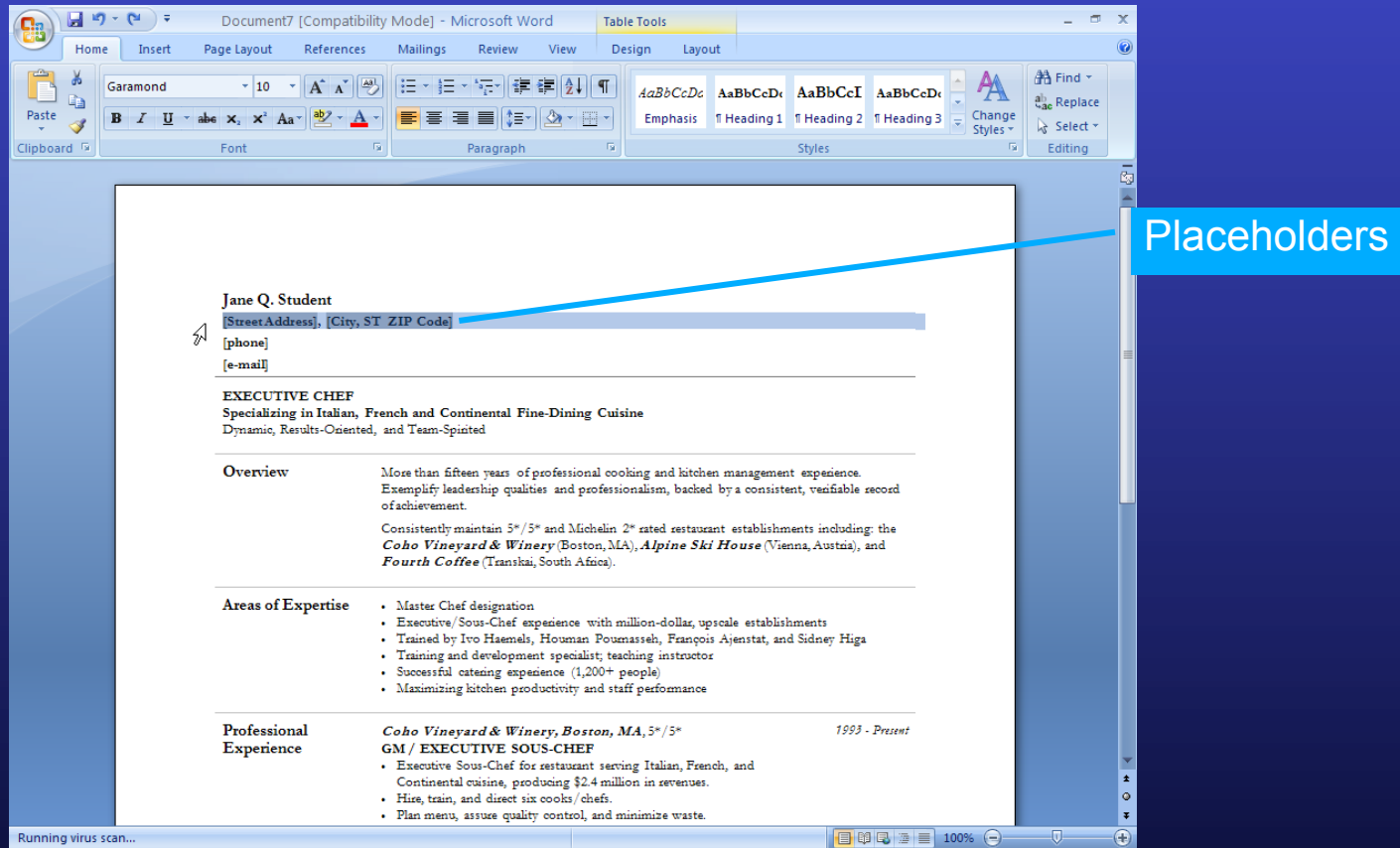
- More templates are available at www.office.microsoft.com

Template Extensions

.dotx
.dotm
.dot

- .dotx is the template extension
- .dotm is the extension for templates containing macros
- .dot is the template extension for pre-2007 versions of Word

Using a Resume Template



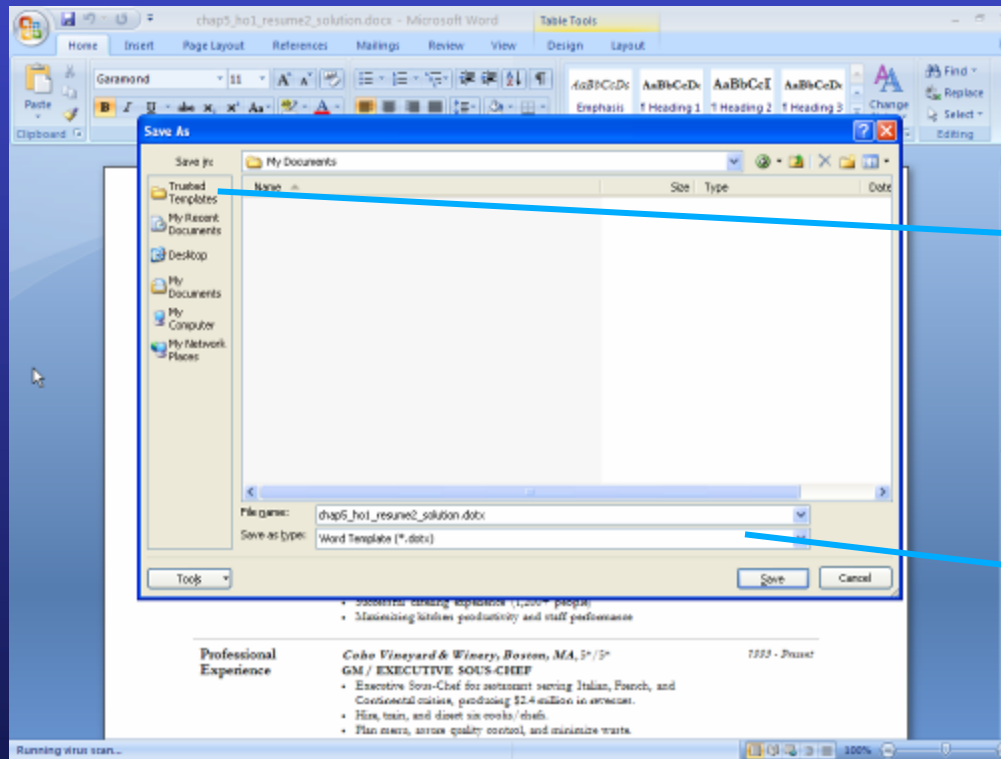
- Replace placeholders with appropriate text

Creating a Template



- Create templates when a particular document will be used frequently with minor modifications
- Example: Company letterhead with greeting, body and salutation

Save a File as a Template

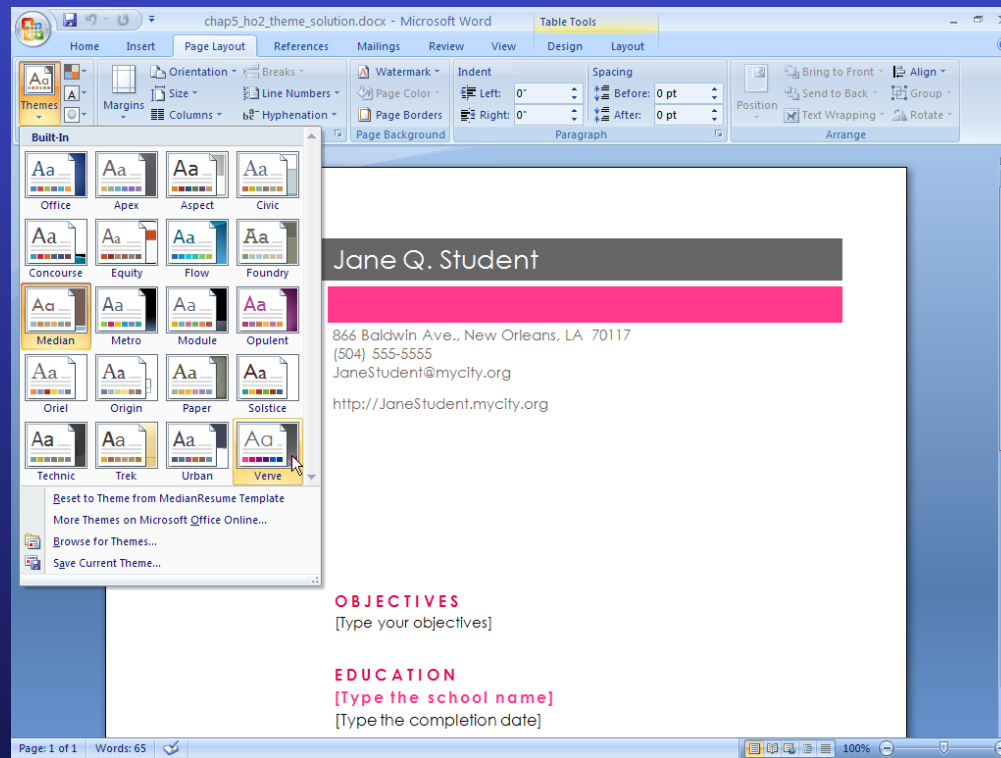


Folder on your hard drive for your templates

Choose Word Template to save file as a template

- Choose Word template in Save as type drop down menu to save a file as a template

Document Themes

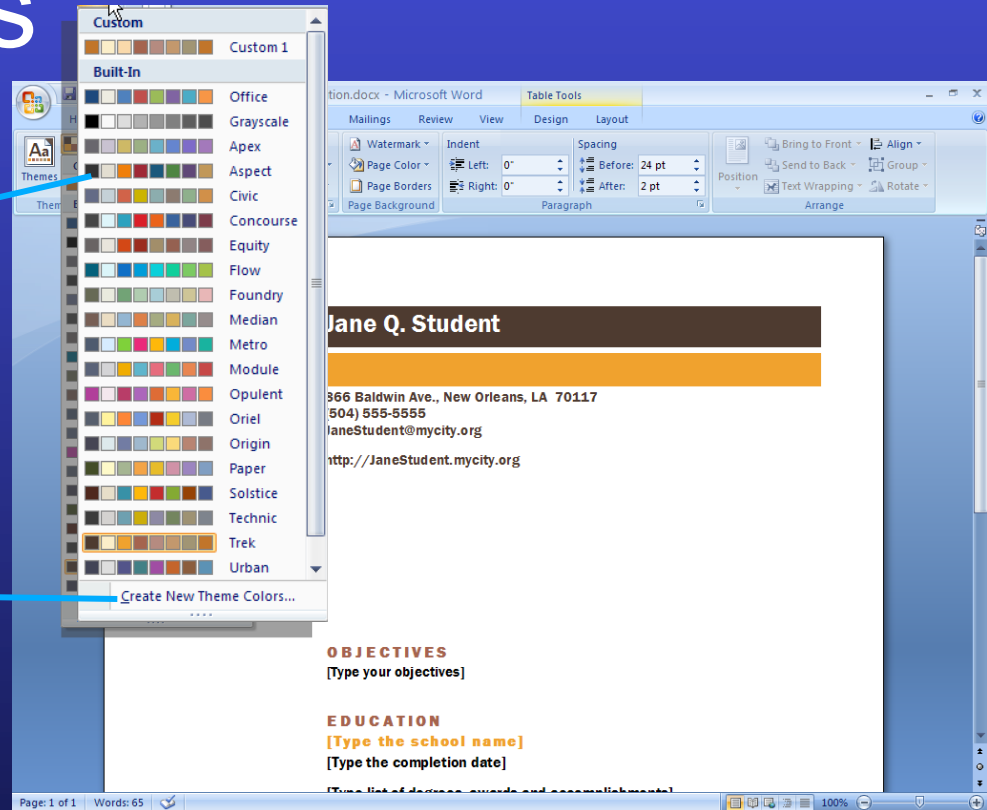


- Themes improve a document's design by quickly providing special effects for a stylish and professional look

Theme Colors

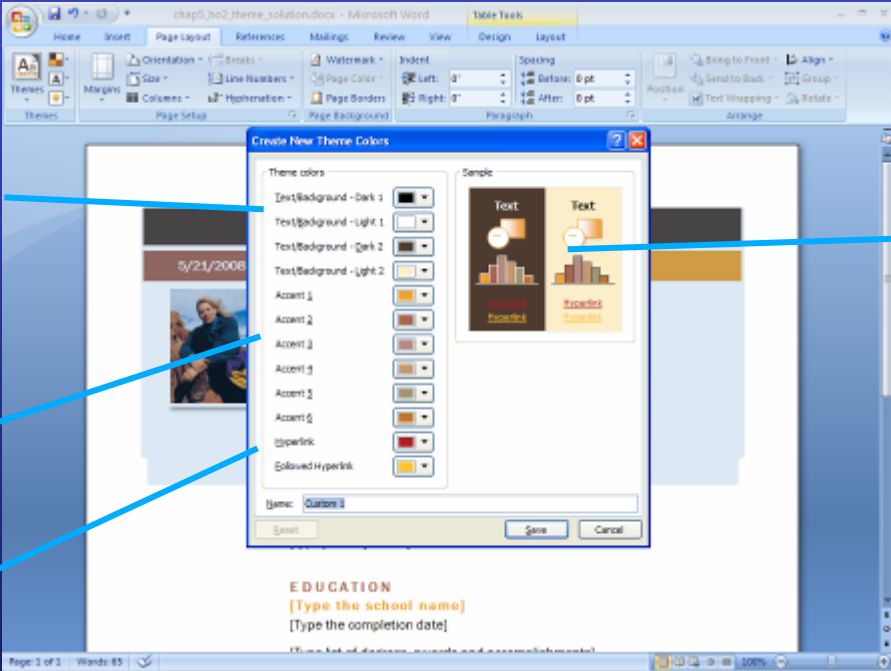
Choose a new
theme color
scheme

Design one of
your own



- Theme colors represent the current text and background, accent and hyperlink colors
- Click Create New Theme Colors to design your own color palate

Customizing Theme Colors



The screenshot shows the 'Create New Theme Colors' dialog box in Microsoft Word. The dialog has a 'Theme colors' section on the left with color pickers for 'Text/Background - Dark 1', 'Text/Background - Light 1', 'Text/Background - Dark 2', 'Text/Background - Light 2', and six 'Accent' colors. It also includes 'Hyperlink' and 'Followed Hyperlink' color pickers. A 'Name' field is set to 'Custom'. On the right, a 'Sample' area shows how these colors are applied to text and background in a document snippet. Annotations with blue lines point to these specific areas: 'Choose four Text/Background colors' points to the first four theme color pickers; 'Choose six Accent colors' points to the six accent color pickers; 'Choose Hyperlink and Followed Hyperlink colors' points to the hyperlink color pickers; and 'Sample area to view color interaction' points to the 'Sample' preview area.

Choose four Text/Background colors

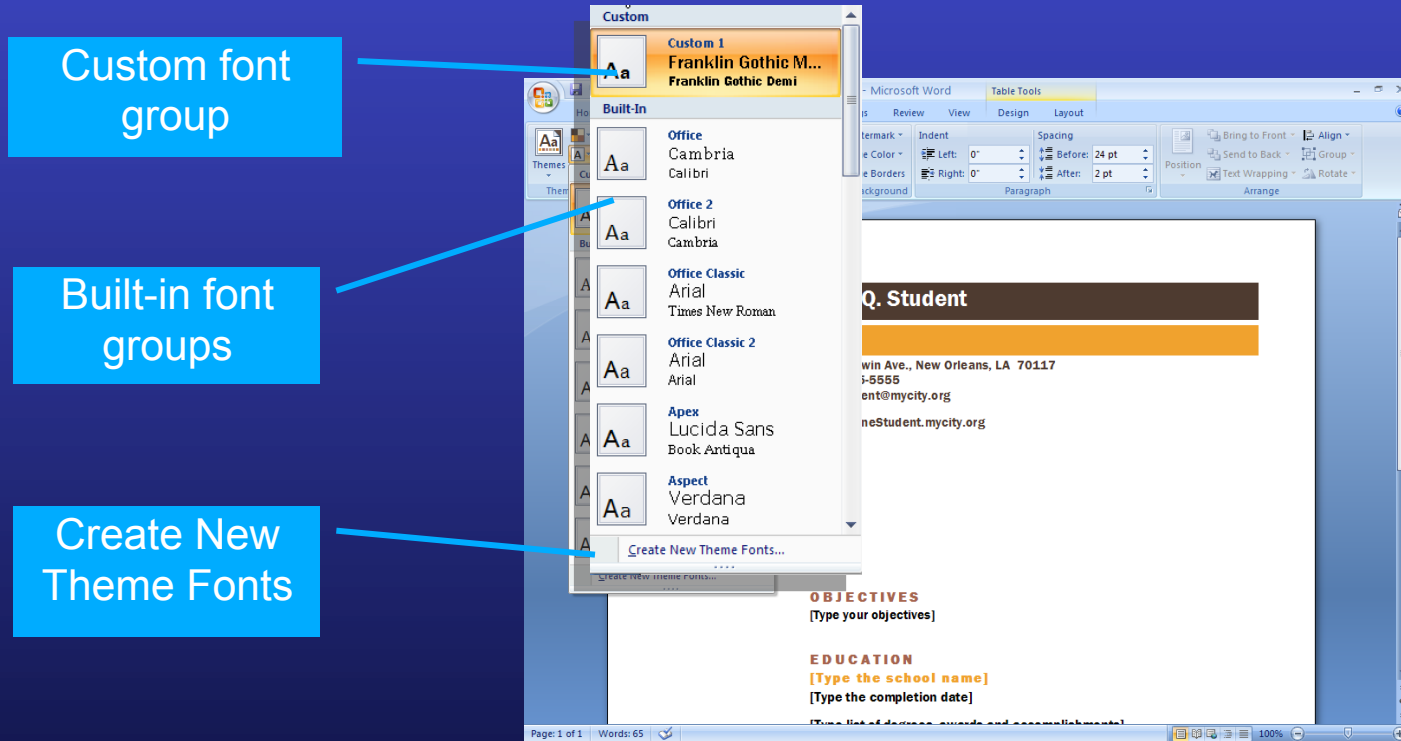
Choose six Accent colors

Choose Hyperlink and Followed Hyperlink colors

Sample area to view color interaction

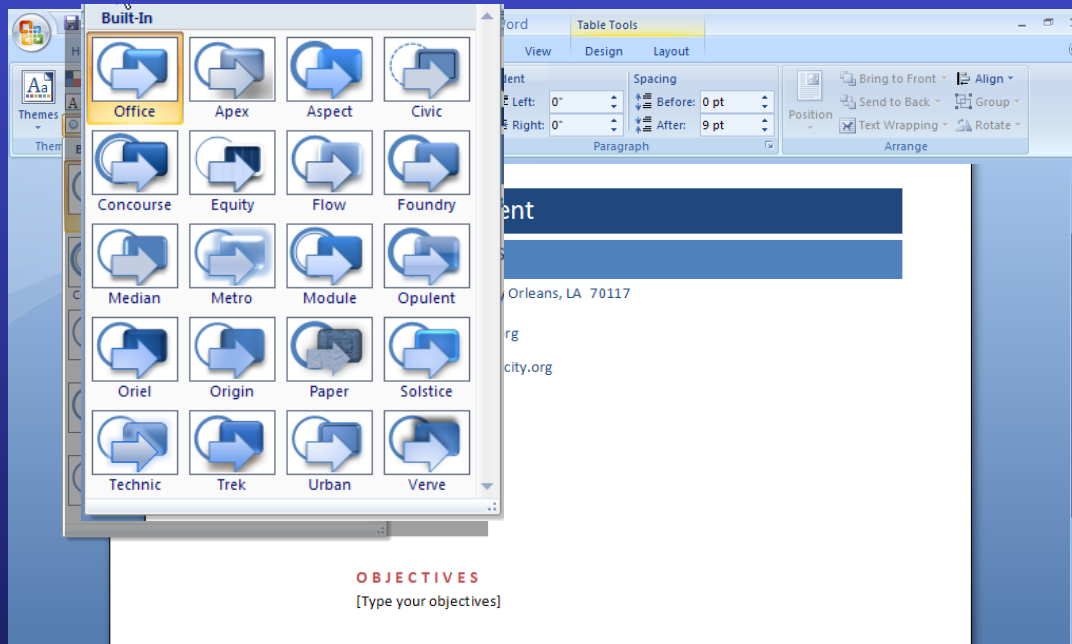
- In the Create New Theme Colors dialog box, choose the new theme colors

Theme Fonts



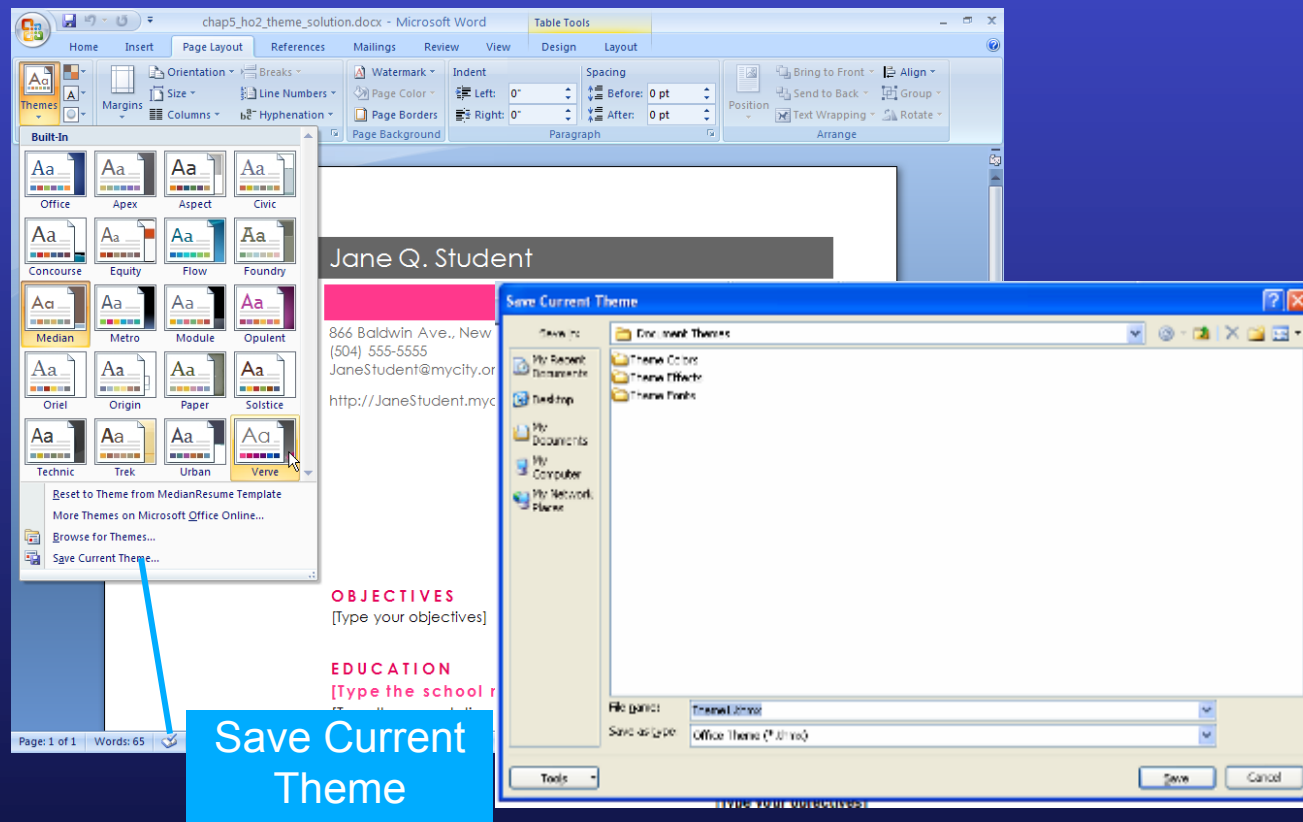
- Theme fonts consist of heading and body text fonts

Theme Effects



- Theme Effects include lines and fill effects, such as shadowing, glows and borders
- Effects apply to objects
- Theme Effects are built in and cannot be created

Saving Themes



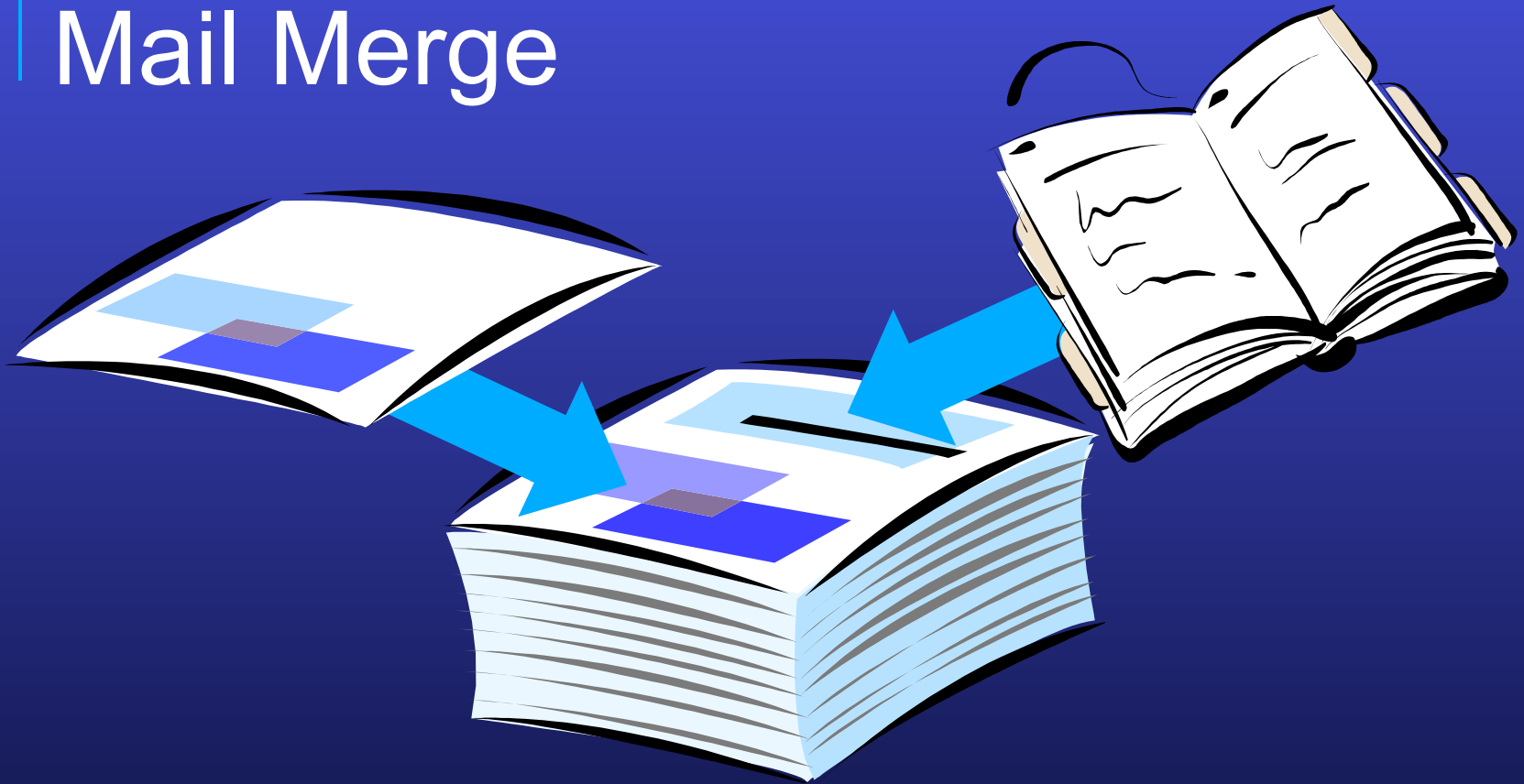
- Save custom themes as Office Theme (*.thmx) in the Document Themes folder

Themes and Compatibility Mode



- If the Theme group is grayed out and unavailable, the current document is probably open in Compatibility Mode
- Document must be saved in Word 2007 format (.docx)

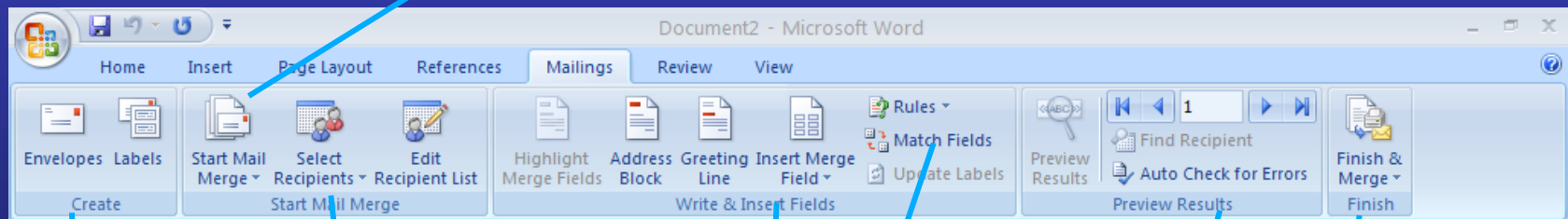
Mail Merge



- Mail Merge combines content from a Word document and information from a data source resulting in personalized documents for multiple recipients

Mailings Ribbon

Start Mail Merge
With main
document open



Specialty
merge
documents

Choose and edit the
data source
(recipients)

Area for inserting
fields into the main
document

Match Fields if
necessary

Preview
Results

Merge the data
and the
document

Mail Merge: The Main Document

The diagram shows a sample mail merge document template. It includes a header with the sender's name and address, a date, and a salutation. The body of the document contains a letter template with several fields marked with «Field Name» placeholders. Three callout boxes point to specific parts of the document: one points to the address fields, another points to a field in the body, and a third points to the main body text.

Fields will be replaced by information in records

A field in the body of the document

The same content for each document

JANE Q. STUDENT
866 Baldwin Ave., New Orleans, LA 70117 | (504) 555-5555 | JaneStudent@mycity.org

May 21, 2008

«First_Name» «Last_Name»
«Address_Line_1»
«City» «State» «ZIP_Code»

Dear «Title» «Last_Name»:

I would like to express my interest in working for your Restaurant, «Company_Name», as an Executive Chef. I have been trained at the finest institution in Europe and have several years of experience in which I molded that training into an art.

As you view my resume please pay special attention to the following:

- I have maintained a 5*/5* and Michelin 2* restaurant rating.
- I have experience and knowledge from the international positions I held. I enjoy injecting those cultural experiences into my culinary projects.
- I have managerial and training experience that enables me to associate more closely and in a more supportive role with my coworkers.

I hope you will review my resume closely and then feel free to contact me with any questions you might have. I would be honored to speak with you personally about this position and how I can best serve in the capacity of Executive Chef. My phone number is (504) 555-5555. I look forward to hearing from you soon.

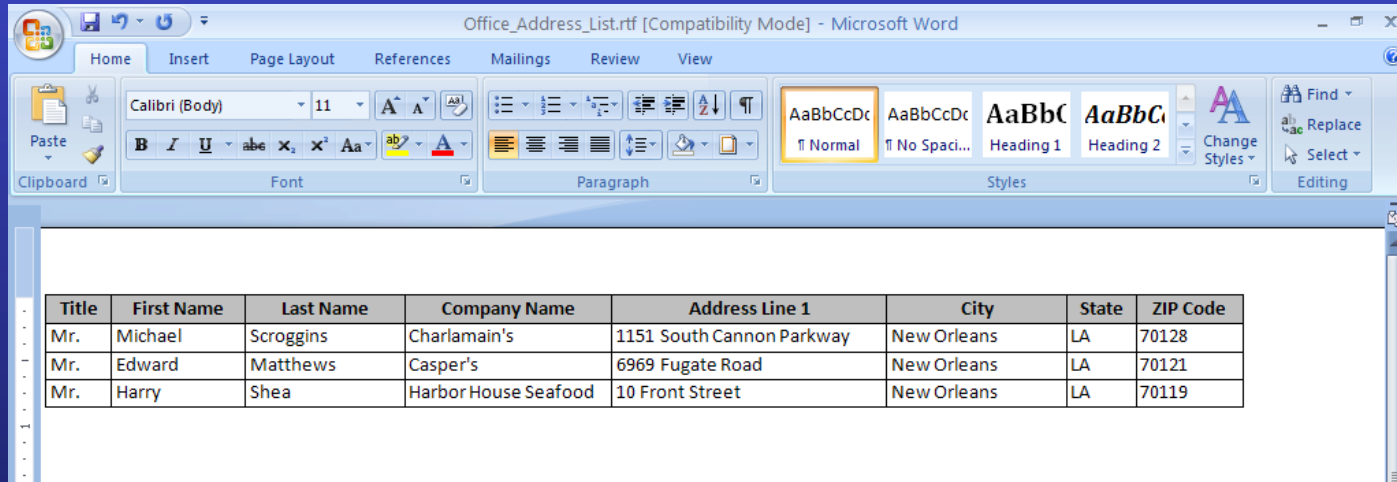
Sincerely,

JANE Q. STUDENT

ENCLOSURES

- The main document (source document) contains Fields where record information is linked and ultimately integrated
- The body of the document is written here

Mail Merge: Data Source

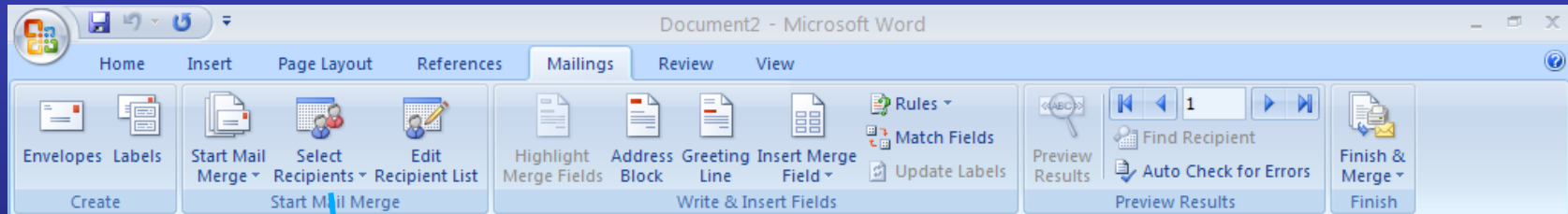


The screenshot shows the Microsoft Word interface in Compatibility Mode. The title bar reads "Office_Address_List.rtf [Compatibility Mode] - Microsoft Word". The ribbon is set to the "Home" tab, with the "Font" group selected. The font is Calibri (Body), size 11. The "Paragraph" group shows the "Normal" style selected. The "Styles" group shows "Normal", "No Spacing", "Heading 1", and "Heading 2". The "Editing" group shows "Find", "Replace", and "Select". The main document area contains a table with 8 columns: Title, First Name, Last Name, Company Name, Address Line 1, City, State, and ZIP Code. The table has 3 rows of data.

Title	First Name	Last Name	Company Name	Address Line 1	City	State	ZIP Code
Mr.	Michael	Scroggins	Charlamain's	1151 South Cannon Parkway	New Orleans	LA	70128
Mr.	Edward	Matthews	Casper's	6969 Fugate Road	New Orleans	LA	70121
Mr.	Harry	Shea	Harbor House Seafood	10 Front Street	New Orleans	LA	70119

- A Record consists of related fields grouped by rows
- A Field Name is the column heading
- A Field is a single piece of data from a record to be used in a source document

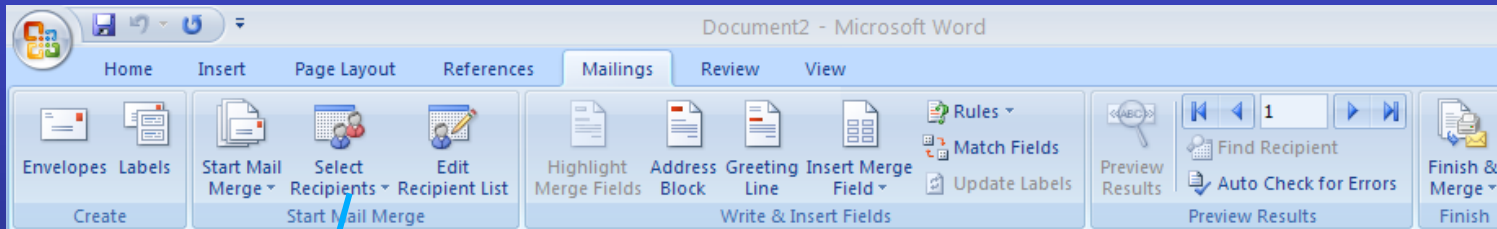
Mail Merge: Link a Data Source



Select Recipients
links a data source

- Select Recipients to link the data source to the main document

Mail Merge: Excel as Data Source



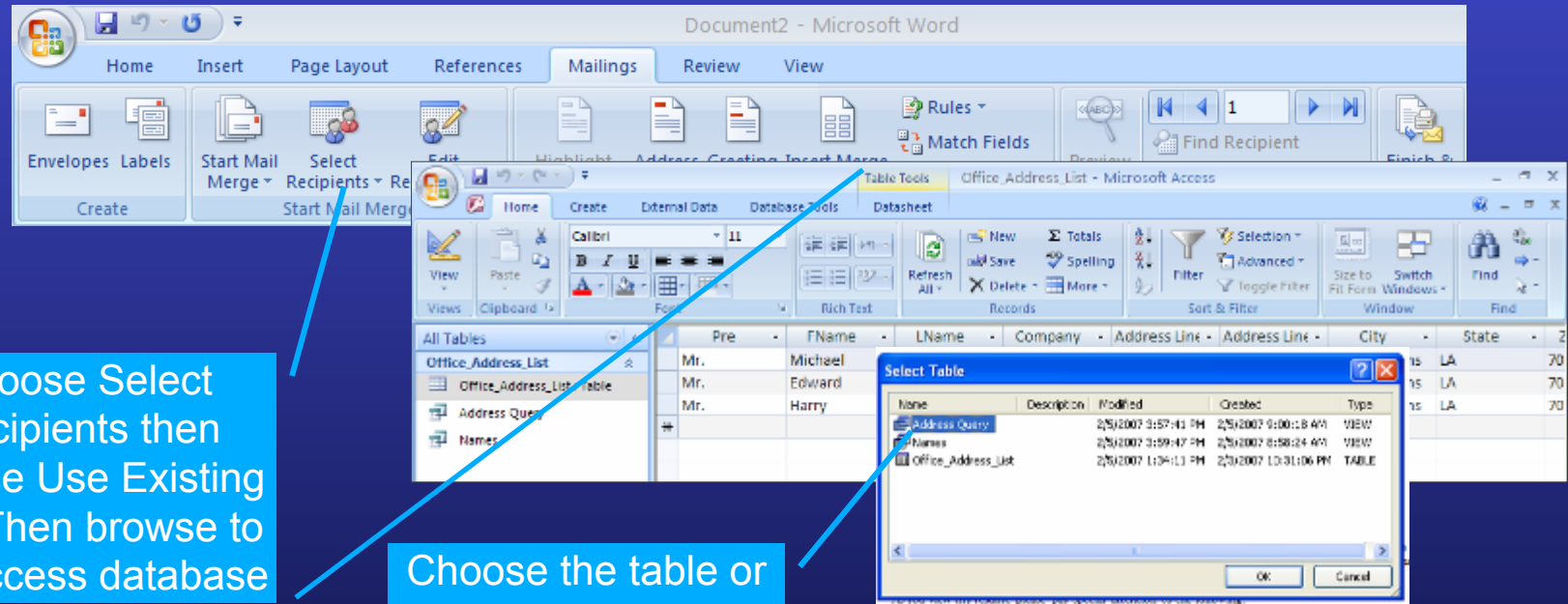
Choose Select Recipients then choose Use Existing. Then browse to the Excel Workbook

The screenshot shows the 'chap5_ho4_source.xlsx' worksheet in Microsoft Excel. The table has a header row (row 1) and three data rows (rows 2-4). The header row is highlighted with a blue box and labeled 'Header row'. The data rows contain names and addresses.

	A	B	C	D	E	F	G	H	I
1	Title	First Name	Last Name	Company Name	Address Line 1	Address Line 2	City	State	ZIP Code
2	Mr.	Michael	Scroggins	Charlemaim's	Way		New Orleans	LA	70128
3	Mr.	Edward	Matthews	Casper's			New Orleans	LA	70121
4	Mr.	Harry	Shea	Harbor House			New Orleans	LA	70119

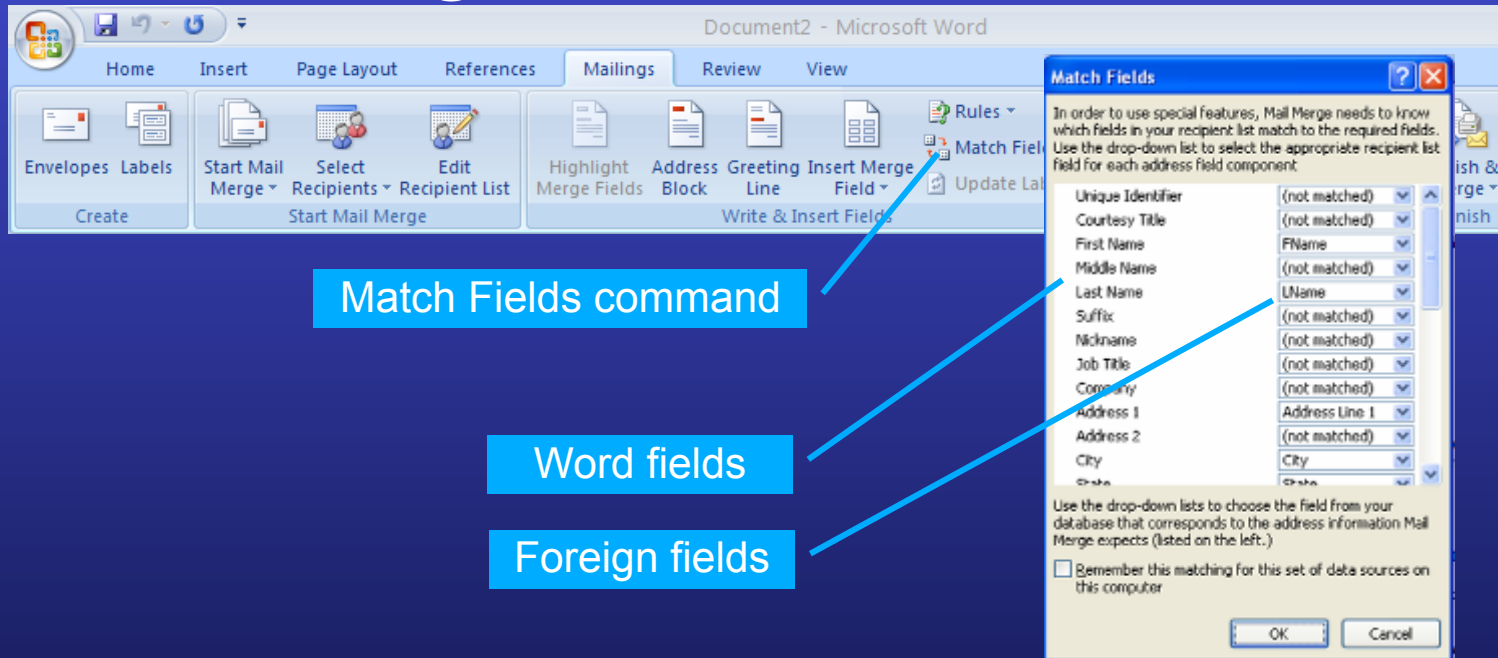
- If the Worksheet has a header row, it may be used as a data source

Mail Merge: Access as Data Source



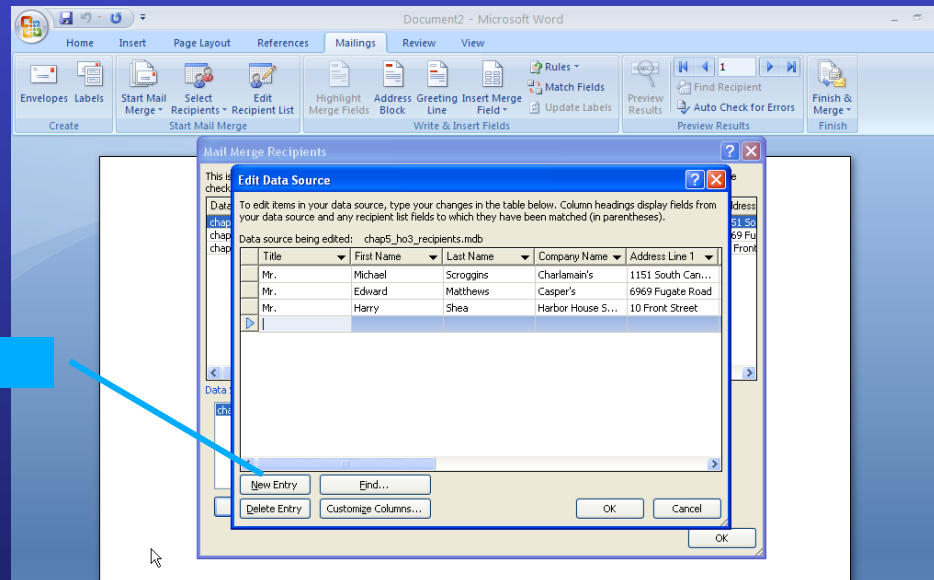
- When using an Access Database choose the correct table or query to be used

Mail Merge: Match Fields



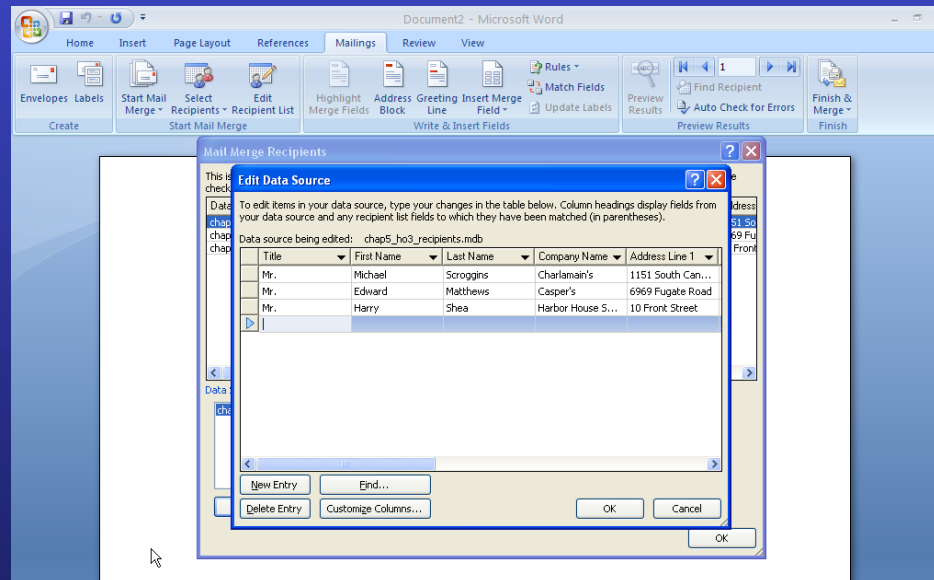
- If your external data source (Excel or Access) contains field names different from Word, use the Match Fields command to create links between the fields

Mail Merge: Add New Records



- Add more records to the data source
- Add new record under the final record on the table
- The blue arrow shows the active record

Mail Merge: Edit Records



- Edit records by making changes to the active record
- Be sure spelling and capitalization are correct

Mail Merge: Selecting Recipients

The screenshot shows the Microsoft Word interface with the 'Mailings' tab selected. The 'Edit Recipient List' button in the 'Start Mail Merge' group is highlighted with a blue callout box that says 'Click Edit Recipient List'. The 'Mail Merge Recipients' dialog box is open, displaying a table of recipients. A second blue callout box points to the checkboxes in the first column of the table, stating 'Use the checkboxes to add or remove recipients from the merge'.

Document2 - Microsoft Word

Home Insert Page Layout References Mailings Review View

Envelopes Labels Start Mail Merge Select Recipients Edit Recipient List

Create Start Mail Merge Select Recipients Edit Recipient List

Highlight Address Greeting Insert Merge Preview Find Recipient To Check for Errors Finish & Merge

Mail Merge Recipients

There is a list of recipients that will be used in your merge. Use the options below to add to or change your list. Use the checkboxes to add or remove recipients from the merge. When your list is ready, click OK.

Data Source	Address1	City	State	ZIP	Phone
chap5_ppt_homes...	627 Singleton Road	Jacksonville	FL	32220	(904) 555-627
chap5_ppt_homes...	1042 Gregory Lane	Saint Augustine	FL	32095	(904) 555-627
chap5_ppt_homes...	2710 Legacy Point Drive	Jacksonville	FL	32221	(904) 555-627
chap5_ppt_homes...	2001 Benson	Jacksonville	FL	32220	(904) 555-627
chap5_ppt_homes...	<input checked="" type="checkbox"/> 3203 Pecan Glen	Trussville	AL	35125	(912) 555-627
chap5_ppt_homes...	392 Madison	Jacksonville	FL	32210	(904) 555-627
chap5_ppt_homes...	7022 Treppers Rd	Jacksonville	FL	32209	(904) 555-627
chap5_ppt_homes...	31032 Laurel Ridge	Orange Park	FL	32063	(904) 555-627
chap5_ppt_homes...	7923 California Ln.	Jacksonville	FL	32222	(904) 555-627
chap5_ppt_homes...	8212 S. Woodson Ct.	Jacksonville	FL	32222	(904) 555-627
chap5_ppt_homes...	21015 S. Clark	Jacksonville	FL	32221	(904) 555-627
chap5_ppt_homes...	4014 N. Commercial	Jacksonville	FL	32209	(904) 555-627

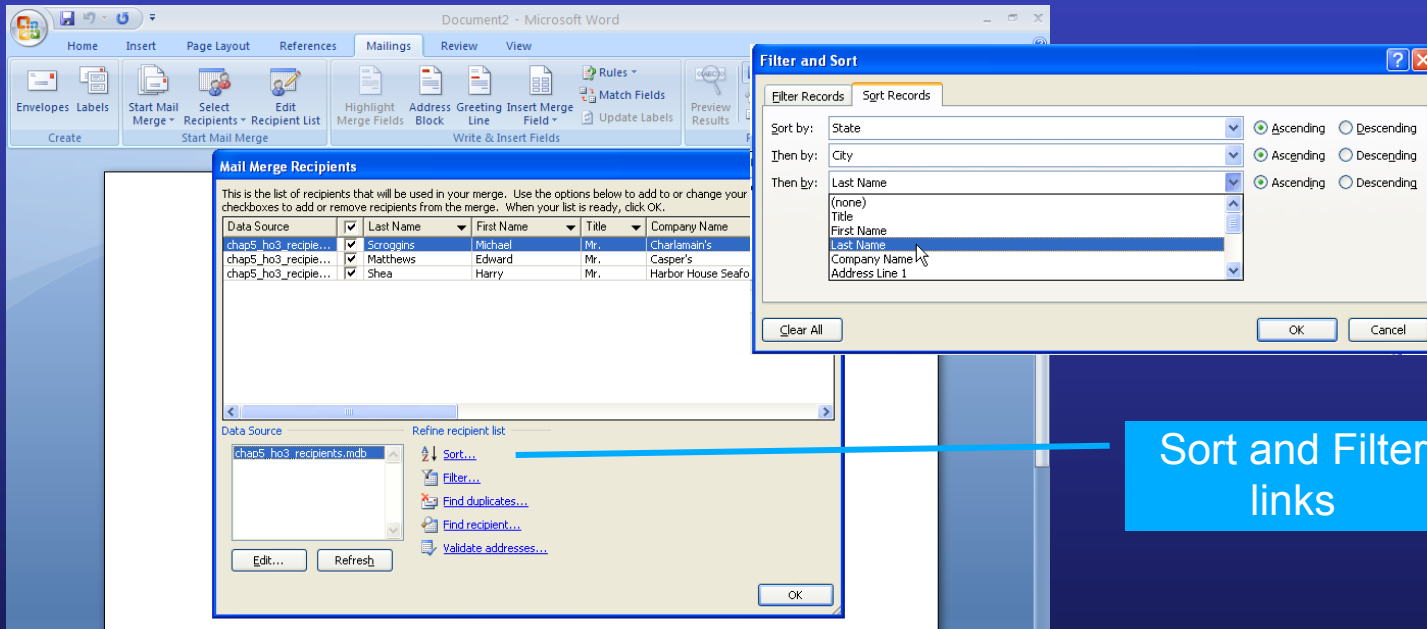
Data Source: chap5_ppt_homes.docx

Remove recipient list

OK

- Choose only the recipients who should receive the merged document

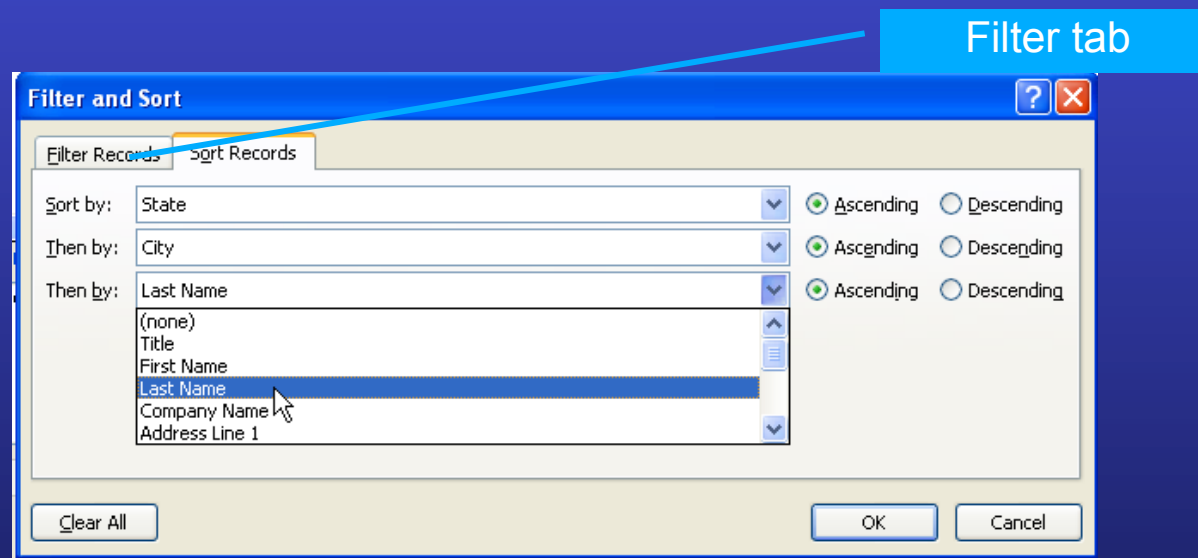
Mail Merge: Sort Records



Sort and Filter links

- Use the Filter and Sort dialog box to sort records into desirable orders before merging to save time later

Mail Merge: Using a Filter



- Specify criteria to choose only certain types of records for a merge

Merge Fields

Title	First Name	Last Name	Company Name	Address Line 1	City	State	ZIP Code
Mr.	Michael	Scroggins	Charlmain's	1151 South Cannon Parkway	New Orleans	LA	70128
Mr.	Edward	Matthews	Casper's	6969 Fugate Road	New Orleans	LA	70121
Mr.	Harry	Shea	Harbor House Seafood	10 Front Street	New Orleans	LA	70119

JANE Q. STUDENT

866 Baldwin Ave, New Orleans, LA 70117 | (504) 555-5555 | JaneStudent@mycity.org

May 21, 2008

«First_Name» «Last_Name»

«Address_Line_1»

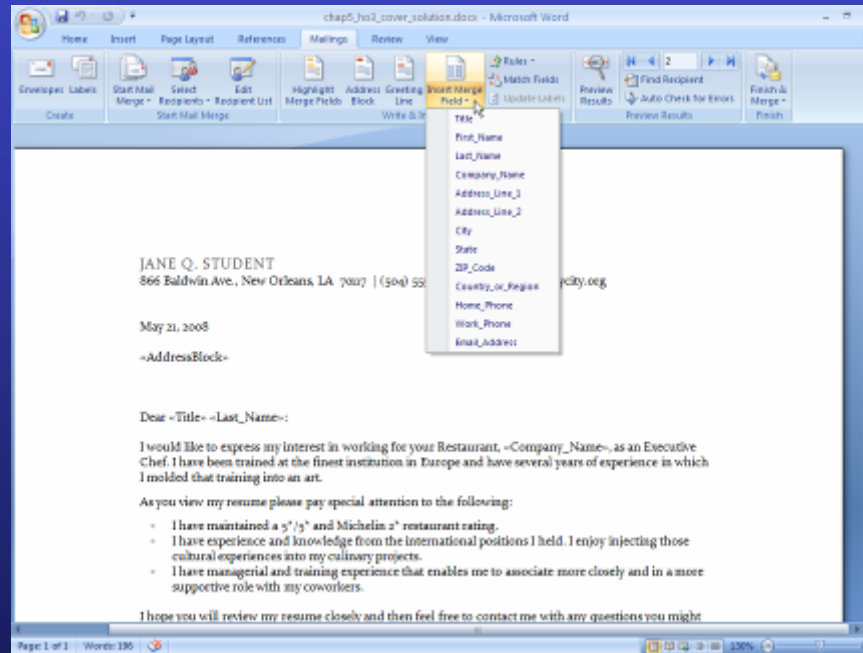
«City» «State» «ZIP_Code»

Dear «Title» «Last_Name»:

I would like to express my interest in working for your Restaurant, «Company_Name», as an Executive Chef. I have been trained at the finest institution in Europe and have several years of

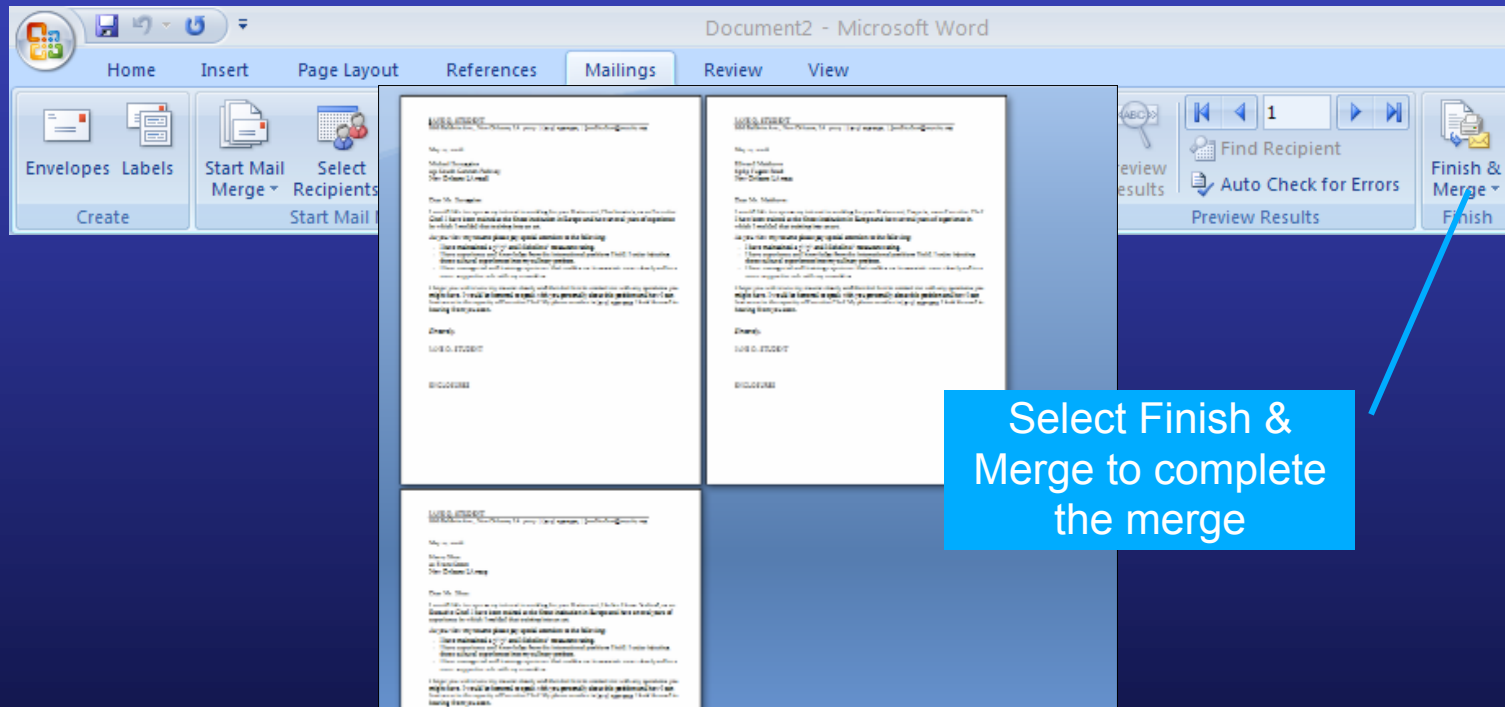
- Fields placed in the main document are replaced with corresponding data from the data source when merged

Mail Merge: Inserting Merge Fields



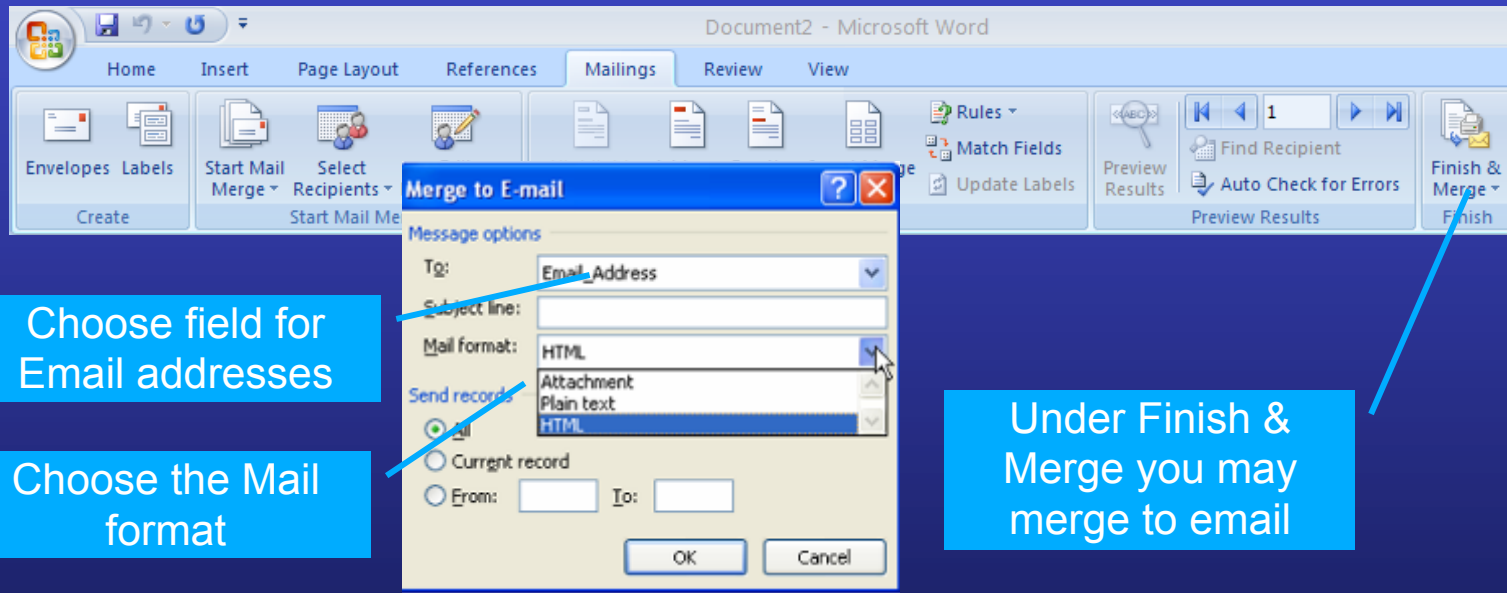
- With the main document open add fields from the data source using the Insert Merge Fields button
- Available fields are shown

Merging a Main Document and a Data Source



- Once the main document and the data source are merged, a separate document for each record is produced

Mail Merge to E-mail



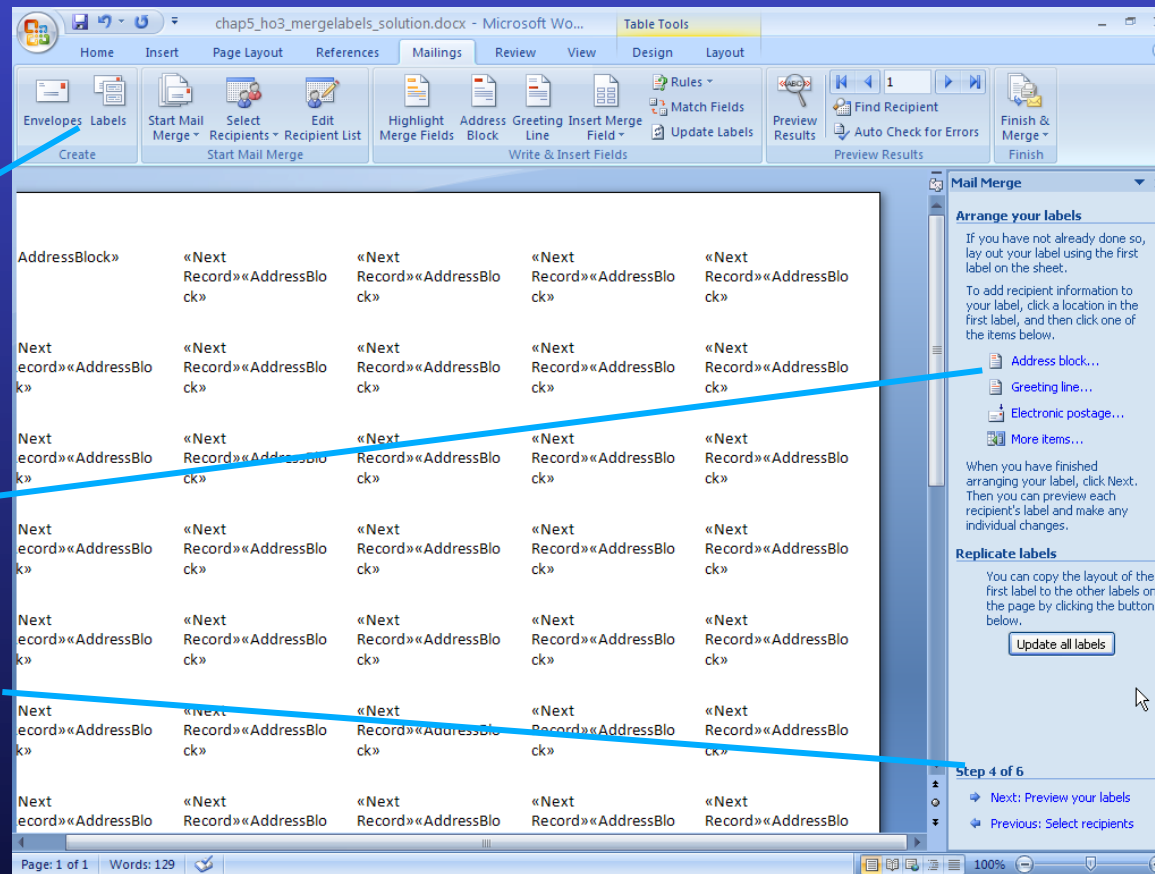
- Mail merges are used to send personalized e-mail

Printing Mailing Labels or Envelopes

Choose
Envelopes
or Labels

Follow the
Wizard

This is step
4 of 6



- Produce envelopes and labels using Mail Merge

Questions?

