

# Merging MS Word and Excel in XP

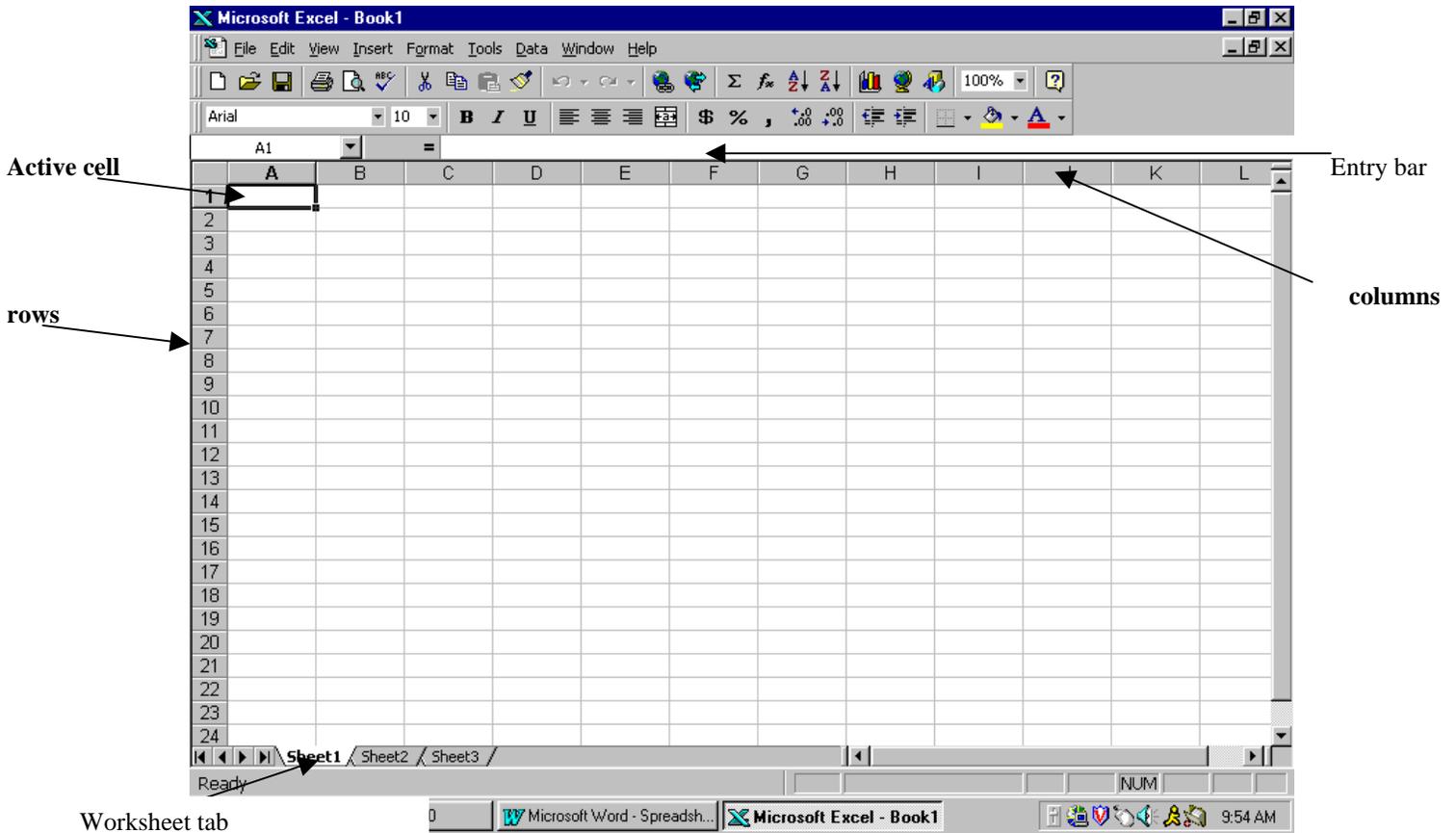
## Create you database in Microsoft Excel®

Spreadsheets are used for math but will also help you organize text and numbers into rows and columns.

### Create a new spreadsheet

Open Excel from the Programs list.

You should see a grid of **rows** and **columns**. The rows are numbered, the columns are lettered. The intersection of a row and column is called a **cell**.



### Entering Data

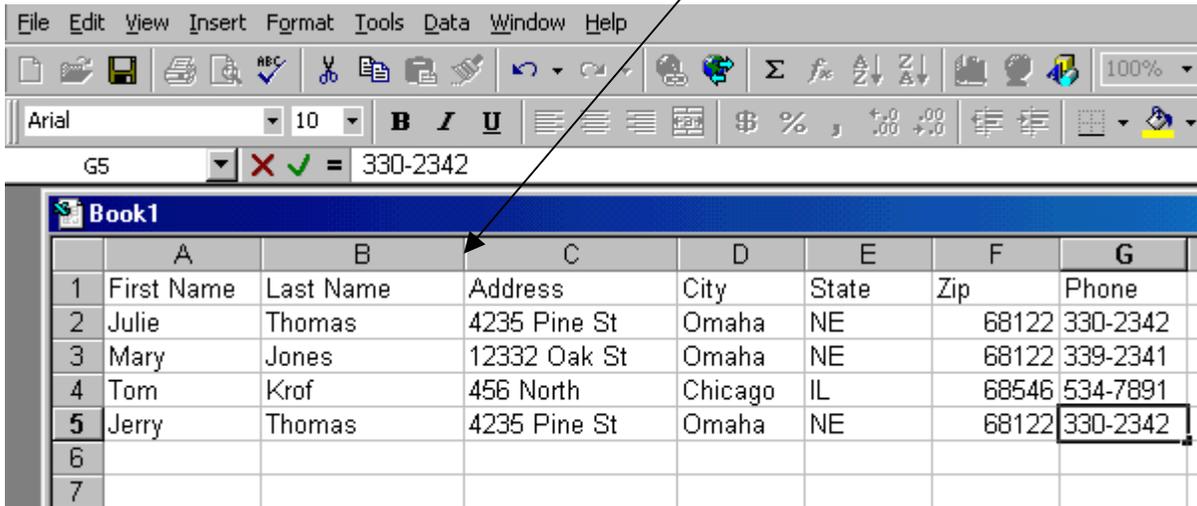
Click the cursor in cell A1. Type "First Name". To move to another cell you can use the enter key, arrow keys or tab key. Continue typing the following information.

First Name	Last Name	Address	City	State	Zip	Phone
Mary	Jones	12332 Oak St	Omaha	NE	68122	339-2341
Tom	Krof	456 North	Chicago	IL	68546	534-7891

Jerry          Thomas      4235 Pine St      Omaha    NE          68122 330-2342  
 Julie          Thomas      4235 Pine St      Omaha    NE          68122 330-2342

### Changing Column Width

Columns can be widened or narrowed by clicking on the line between columns. When your pointer becomes a cross hair click and drag. You can also double click and your column will be widened to the longest entry.

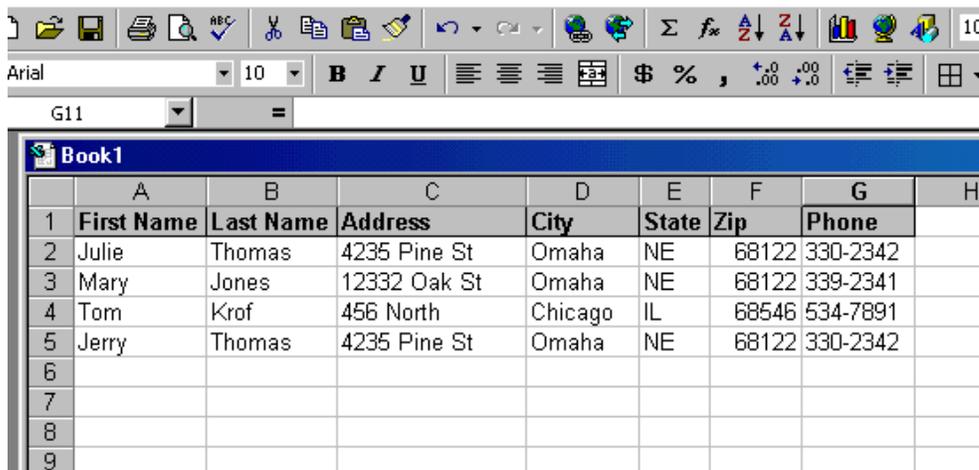


### Inserting and Deleting Columns and Rows

Rows and Columns can be inserted anywhere at anytime by choosing the appropriate command from the Insert Menu. Make sure your cursor is in the row or column that you wish to delete or insert.

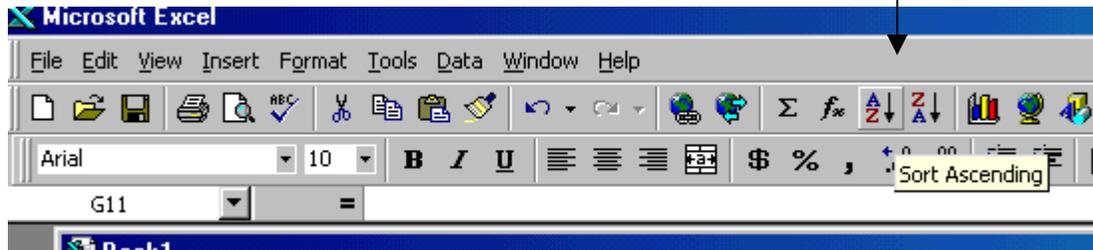
### Formatting

You can change the format of any of the information by highlighting and then choosing options from the Formatting Toolbar or Format menu. Examples include font, size, style, justification of text as well as borders and shading of cells.



## Sorting Data

Information can be sorted by clicking anywhere in the column you wish to sort (do not highlight) and then clicking the Sort Ascending or Sort Descending button on the Standard Toolbar.



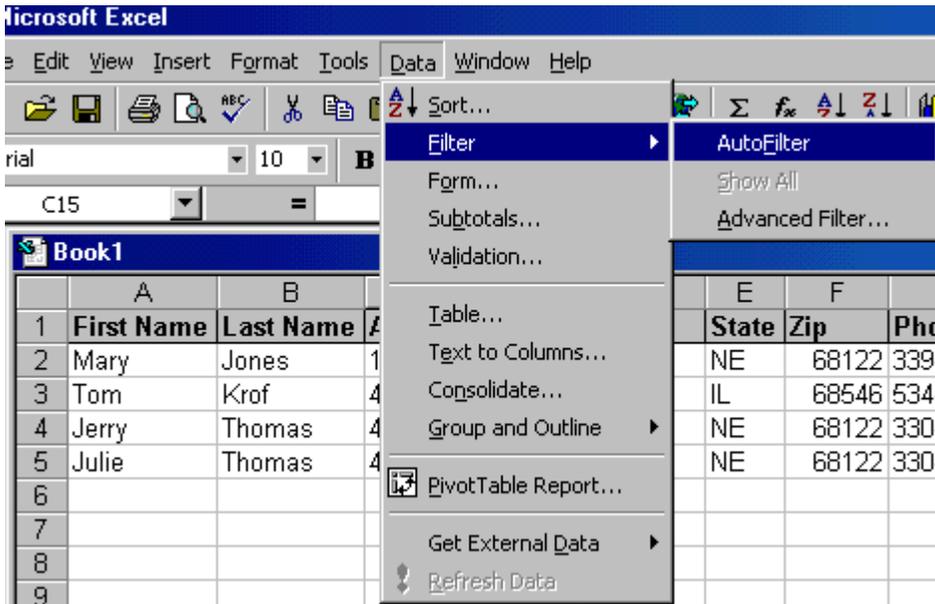
If you need to sort based on the contents of two or more columns, choose Sort from the Data menu. Choose the columns that you want to sort by. For example, if you have people with the same last name sort by last name and then first name and they will be in the proper alphabetical order.



## Filtering

A filter can pull out information based on a criteria that you set. For example, if you would like to see a list of only the people in your database that are from Nebraska you would use a filter.

First click a cell in your database that contains data then choose **Auto Filter** from the **Filter** menu under **Data**.



All of your columns should now have pull down arrows. From the pull down arrow on the State column choose NE.

The screenshot shows the spreadsheet data after filtering. The State column has a pull-down arrow, and the data is filtered to show only people from Nebraska.

	A	B	C	D	E	F	G
1	First Name	Last Name	Address	City	State	Zip	Phone
2	Mary	Jones	12332 Oak St	Omaha	NE	68122	339-2341
3	Tom	Krof	456 North	Chicago	IL	68546	534-7891
4	Jerry	Thomas	4235 Pine St	Omaha	NE	68122	330-2342
5	Julie	Thomas	4235 Pine St	Omaha	NE	68122	330-2342

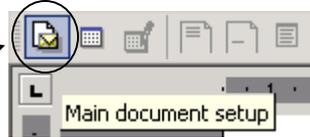
This should give you a list of only those people from Nebraska. You can also create a **Custom Filter** to handle 2 criteria. For example, people from Nebraska and people from Ohio.

1. Choose **All** from the pull down list to get back to the original list.
2. You can remove the pull down arrows from the columns by choosing Auto Filter from the Filter menu under Data.
3. Select the column in which you want to do the Filter and select Auto Filter for just that column.
4. Click on the down triangle and select Custom.

In the first line type the first criteria such as Nebraska and then in the second line type Ohio. You will receive a list of those who are from Nebraska and those from Ohio.

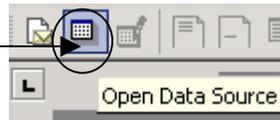
## Merging MS Word and Excel in XP

1. From the **View Menu go to Toolbars and click Mail Merge**. You want to be sure that there is a check mark in front of Mail Merge. A Mail Merge toolbar appears below your formatting bar.



2. Select the first icon (**main document setup**).
  - a. Select the type of document you are creating (Letters, envelopes, labels, etc.)

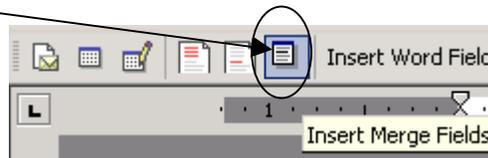
3. Select the **Open Data Source Document**.



- a. Navigate to your database of information and select it.
- b. It may ask which sheet in the database you want to use.

4. Select the **Insert Merge Fields** button.

- a. You must click the insertion point wherever you want the merged field to appear. It seems that you must close the box and insert the fields one at a time.



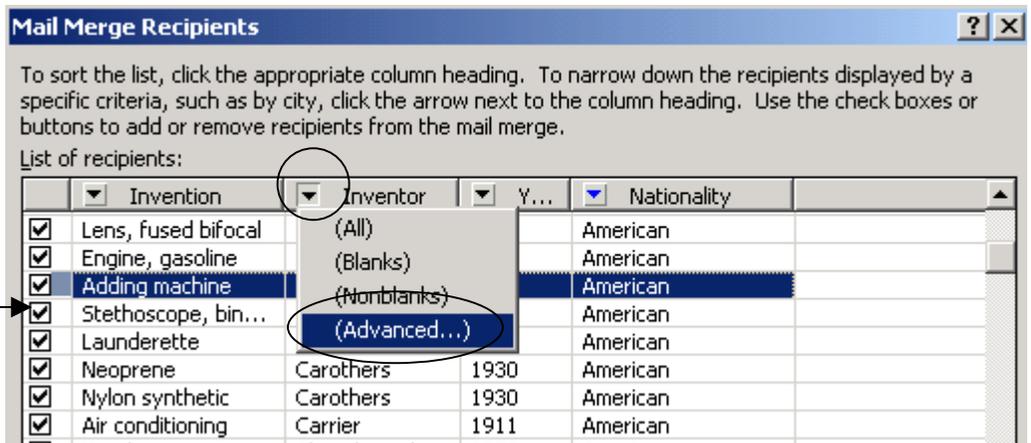
5. **Previewing** your work.

- a. Click on the ABC to see your data. You can move through each record by selecting the right triangles.



6. To determine which recipients will receive the document click on the **Mail Merge Recipients** button.

- a. You will see a mini database of your information.
- b. Use the checkboxes to determine who

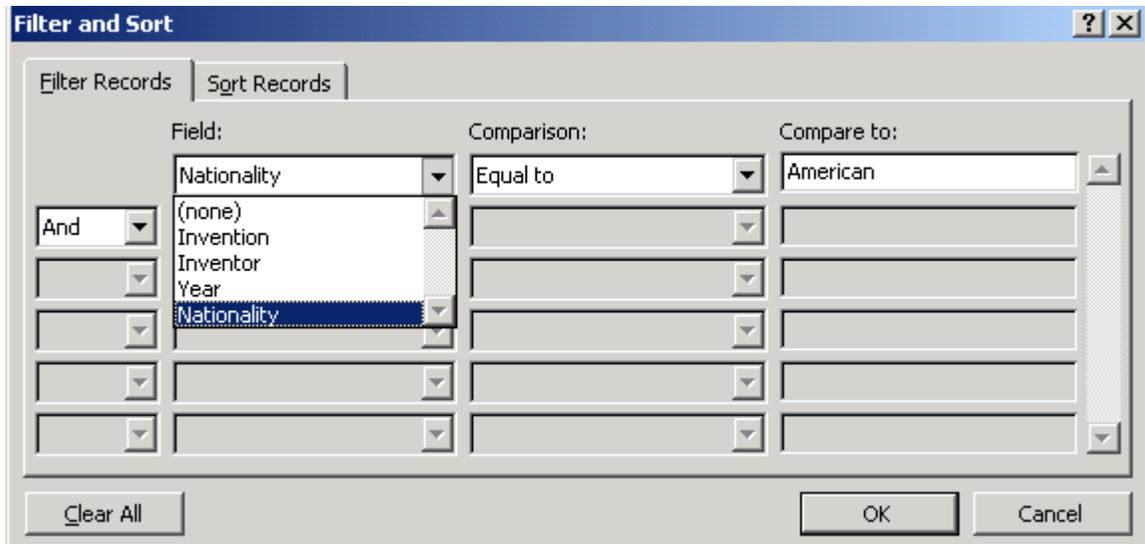


will receive your document.

- c. Click on the column name to sort it A-Z or click again to sort it Z-A.

## 7. Advanced Sorting and Filtering

- a. Click on the down triangle to filter and sort
- b. Select **Advanced** to get your options.
- c. Select the **Field**, type of comparison and exact words to match to select a unique population. In filtering you are selecting *only* members of that population and not everyone in the database.
- d. Clicking on the Sort Records tab allows you to sort the information in any desired order. (i.e. alphabetical by last name, by zip code, etc.)
- e. In the recipients box choose select all to **checkmark all of the recipients**.



## 8. Merge the Data

- a. Merge to new document. This is the preferred way and lets you see what your results will look like.
- b. Merge directly to the printer. (For the brave!)
- c. Merge to email.



9. **Select Merge to New Document** and select OK on the next dialog box. You will see a separate page for each record. This can then be printed.

10. **Print.** You should be able to scroll down and see all of your merged documents.

## Label Hints

1. Follow the same steps for merging a document.
2. In Main document setup select **Labels** rather than Letter.
3. You will be prompted to select the type of label.
4. Continue with the same merging steps.
5. Select the **Open Data Source Document**
6. Select the **Insert Merge Fields** button.
7. Select **Mail Merge Recipients** to determine who should receive a label.
8. Before printing select **Propagate Labels** to fill in the labels on all sheets.
9. You can click the **ABC icon** to preview 1 page of labels.
10. Click the **Merge to New Document**
11. Print

