

# Edge Hill University

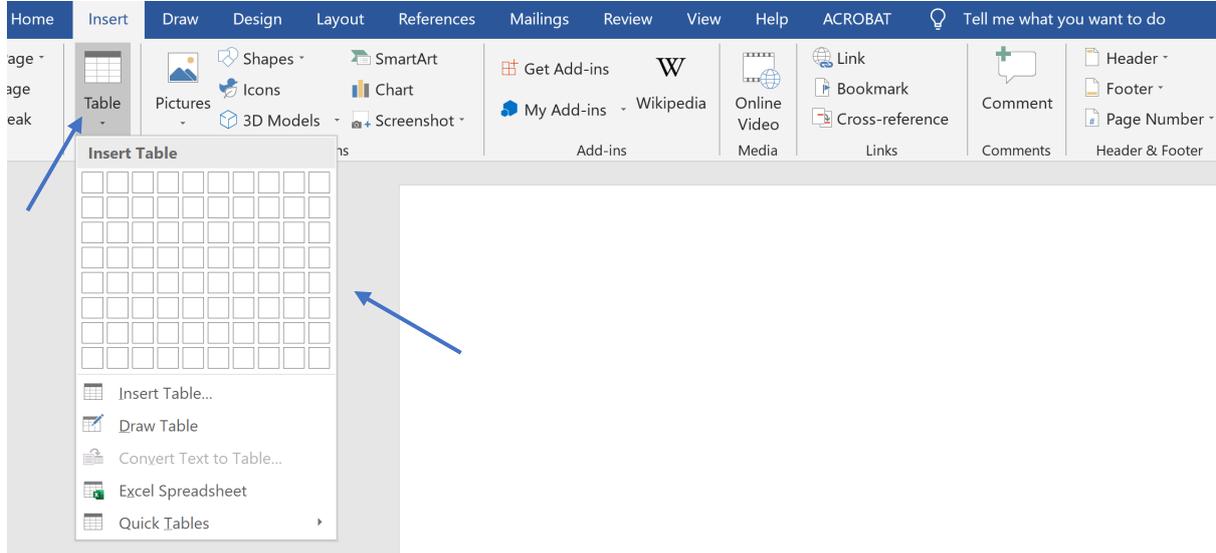
Getting Started with Microsoft Word | Tables, Charts and Mail Merge

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## Create a Table

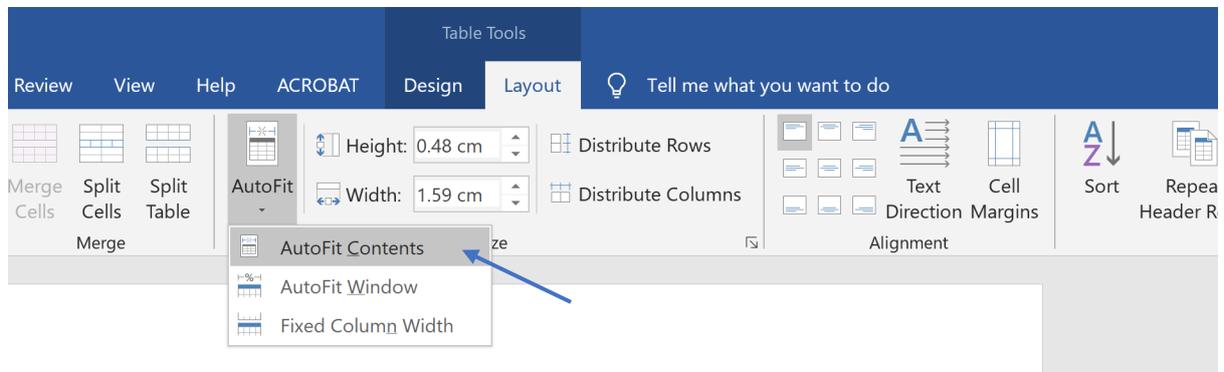
To insert a table into a Word document click **Insert > Table** and choose the number of columns and rows required; more columns can be added later if needed. Once the table has been inserted add text and figures to it by clicking in the cells.



## Using AutoFit

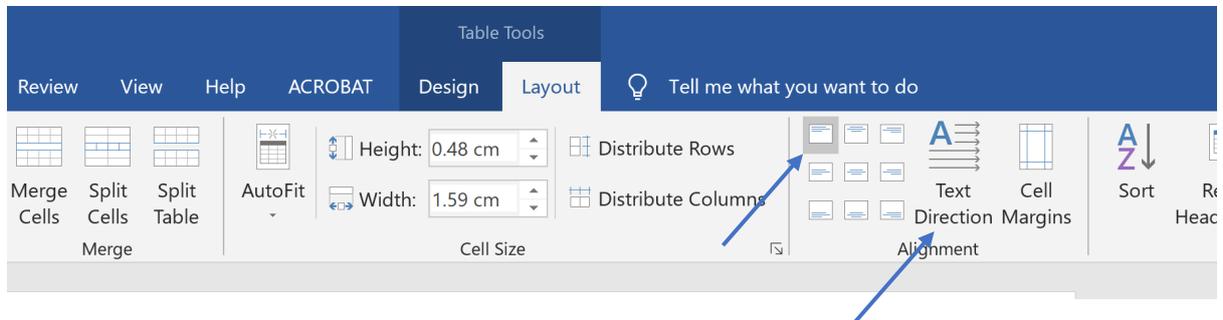
The AutoFit tool ensures that all the cells are the exact height and width needed for the contents.

To use the tool, click on the table then click **Table Tools > Layout > AutoFit > AutoFit Contents**.



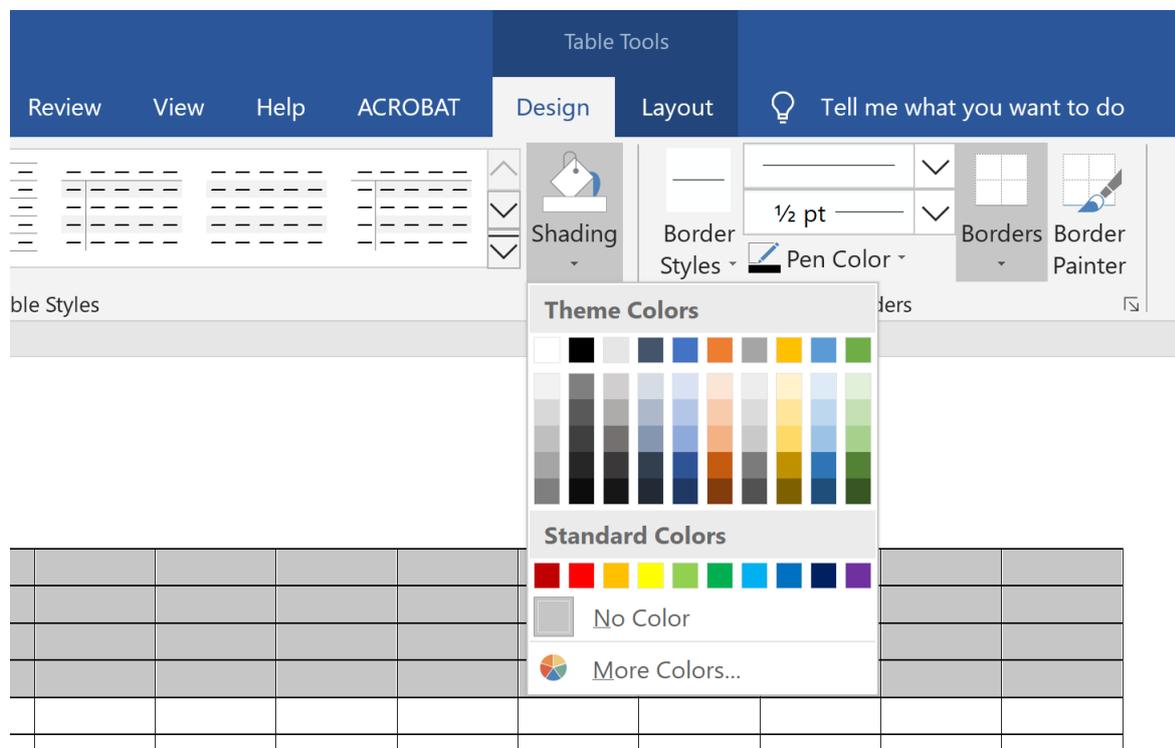
## Aligning Cell Contents

The contents of cells can be aligned in a variety of ways. To change alignment, select the cells then click **Table Tools > Layout** and choose from the Alignment options available. The direction of the text within cells can also be changed.

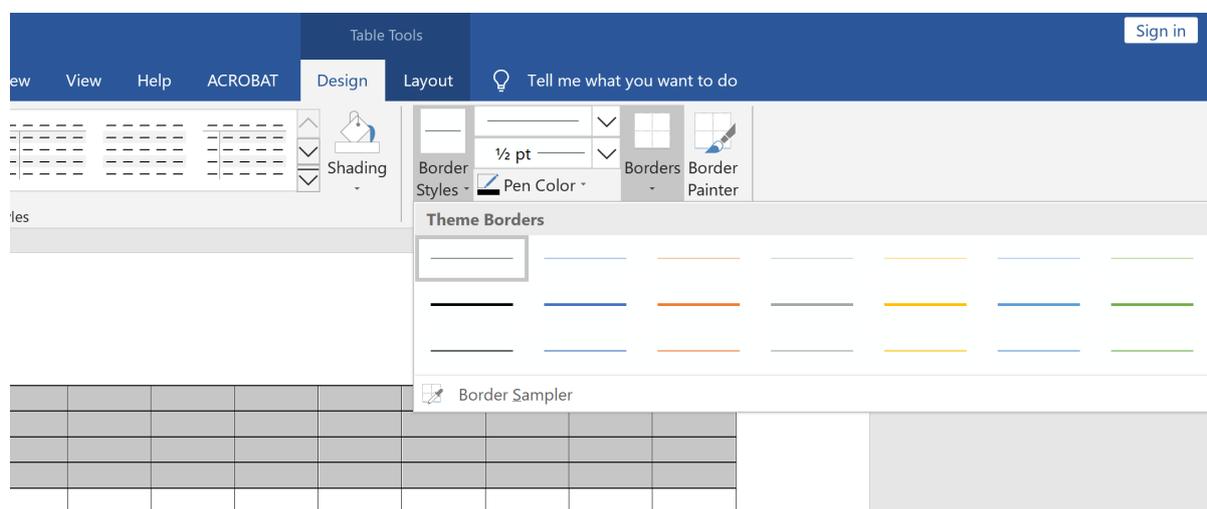


## Formatting Cells

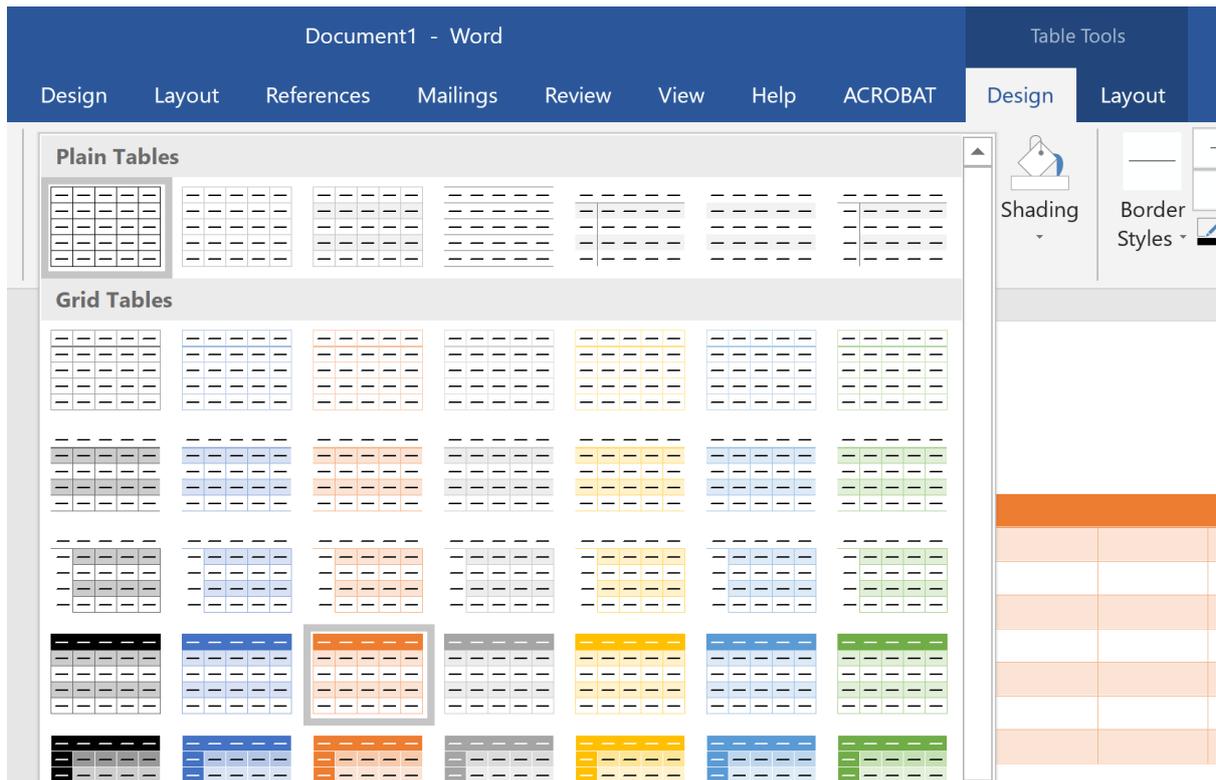
To edit the colour of cells within a table highlight the cells to be changed then click **Table Tools > Design > Shading** and pick from the colour options available.



Borders of cells can be edited by clicking **Table Tools > Design > Borders and Shading** and choosing from the line style, colour and thickness.

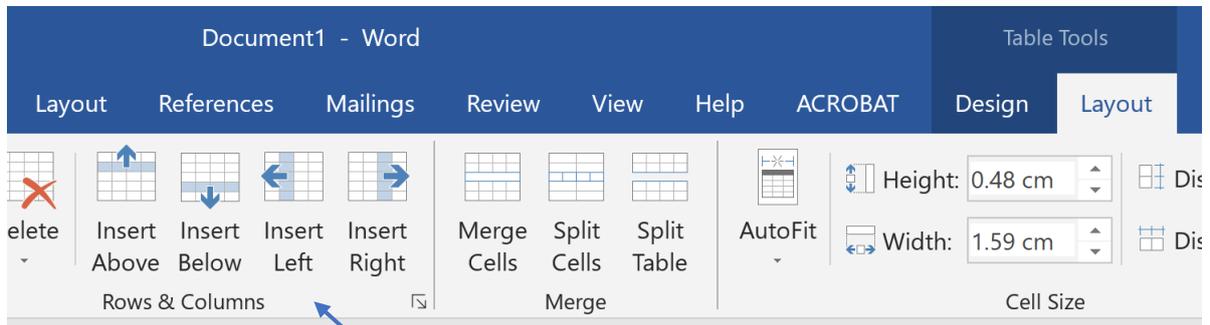


Pre-made styles can be applied to tables by clicking **Table > Tools > Design > Styles** then clicking on the different options to see how they look when applied to the table.



## Adding Rows and Columns

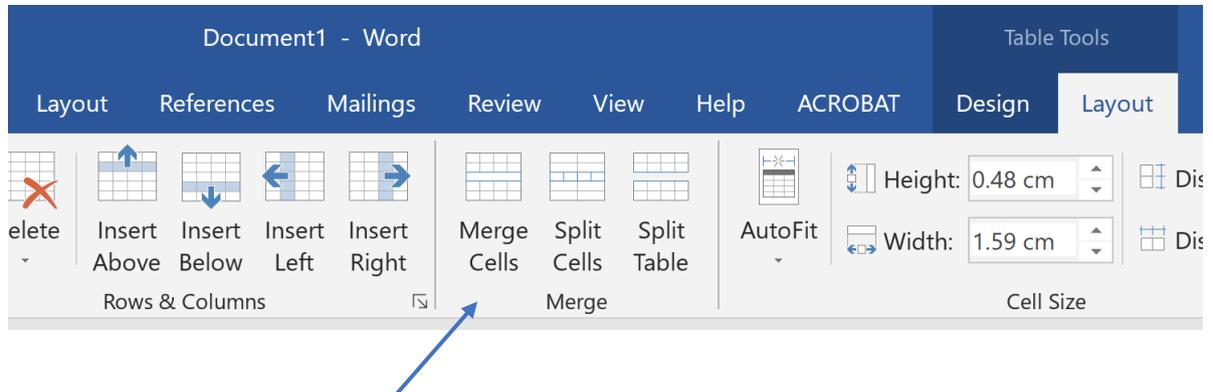
To add another column to a table, click on the table then click **Table Tools > Layout** to view options for adding rows and columns to different positions.



## Merging Cells

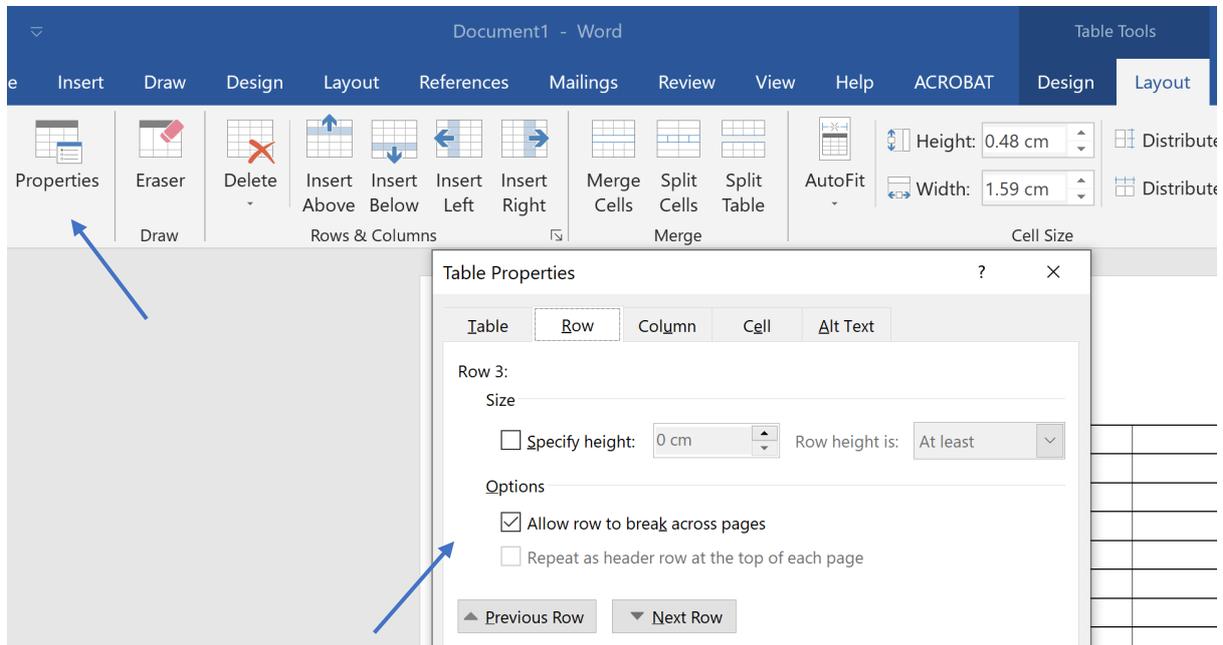
Cells can be merged together in a table; select the cells to merge then click **Table Tools > Layout > Merge Cells**.

Cells may also be split into several sections by clicking **Table Tools > Layout > Split Cells**.



## Table Properties

To ensure rows do not break over pages or to repeat a row as a header at the top of each page that contains a table click **Table Tools > Layout > Properties**. Click on the **Row** tab and tick or untick the necessary boxes.



## Using a Formula

Although not as advanced as Excel, there are options to insert some basic formulas in a Word table.

Click in the cell into which the formula should be added then click **Table Tools > Layout > Formula**.

The screenshot shows the Microsoft Word interface with the 'Table Tools' ribbon active, specifically the 'Layout' tab. The 'Formula' button is highlighted with a blue arrow. Below the ribbon, a table is displayed with the following data:

			10	
			20	
			30	

The 'Formula' dialog box is open, showing the formula `=SUM(ABOVE)` and the number format set to 'General'. A blue arrow points to the cell in the table below the values 10, 20, and 30, indicating where the formula is being applied.

					10		
					20		
					30		
					60		

The table shows the result of the formula. The values 10, 20, and 30 are summed to 60. Blue arrows point from the 10, 20, and 30 cells to the 60 cell, and another blue arrow points to the 60 cell.

Word will automatically *add* (Sum) a group of cells *above* the formula cell by default.

A different function can be selected from the Paste Function box e.g. to multiply the cells select **=PRODUCT** from the options then enter which cells to select (**LEFT**), (**RIGHT**), (**ABOVE**) or (**BELOW**).

Height: 0.48 cm    Distribute Rows  
Width: 1.59 cm    Distribute Columns

Cell Size    Alignment    Data

Sort    Repeat Header Rows    Convert Formula to Text

Formula

Formula: =PRODUCT(ABOVE)

Number format:

Paste function: PRODUCT

Paste bookmark:

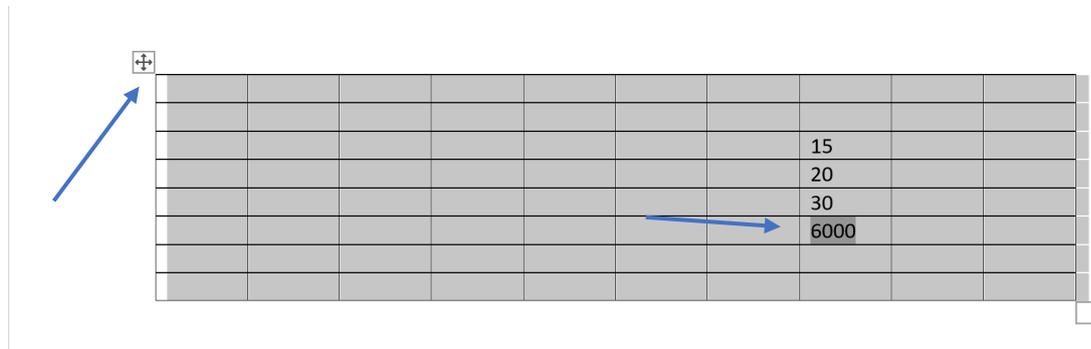
OK    Cancel

			10	
			20	
			30	

			10	
			20	
			30	
			6000	

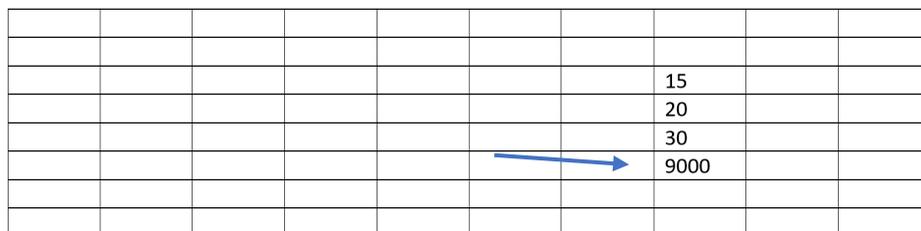
## Updating a Table

When the contents of a cell are changed a formula output will not be updated automatically. To update the table, use **F9** on the computer keyboard to refresh the table.



A screenshot of a table with a grey background. The table has 10 columns and 7 rows. The values in the 8th column are 15, 20, 30, and 6000. A blue arrow points from the top-left corner of the table to a small square icon with a crosshair. Another blue arrow points from the right side of the table to the cell containing 6000.

							15		
							20		
							30		
							6000		



A screenshot of a table with a white background. The table has 10 columns and 7 rows. The values in the 8th column are 15, 20, 30, and 9000. A blue arrow points from the right side of the table to the cell containing 9000.

							15		
							20		
							30		
							9000		

## Sorting

Table contents can be sorted in different ways by clicking **Table Tools > Layout > Sort**.

In the dialog box select which columns to sort the table by and whether ascending or descending.

More than one sort can be applied by selecting from the options in the **Then By** box beneath.

Some tables have a header row which should not be included in the sort - select the **My list has > Header row** option. Click **OK** to complete the sort.

The screenshot shows the Microsoft Word interface with the 'Layout' tab selected. The 'Sort' button in the ribbon is highlighted with a blue arrow. Below the ribbon, a table is visible with the following data:

TASK	LOCATION	HOURS
Teaching	Classroom	4
Administration	Office	1
Research	Library	2

The 'Sort' dialog box is open, showing the following settings:

- Sort by:** TASK (selected in the dropdown menu)
- Type:** Text
- Using:** Paragraphs
- Order:** Ascending (selected)
- Then by:** (empty dropdown)
- Type:** Text
- Using:** Paragraphs
- Order:** Ascending
- My list has:** Header row (selected)
- Options...** button is visible.
- OK** and **Cancel** buttons are at the bottom right.

## Creating Charts

Microsoft Word can link with Microsoft Excel to produce charts.

To insert a chart click **Insert > Chart** and choose a chart type from the options. An Excel window will appear, this is where the data which is to be displayed as a chart should be added.

Ensure that the graph is only showing the cells required by dragging the small blue marker in the left-hand corner of the end cell to cover the set of data to be used.

The screenshot shows the Microsoft Word interface with the **Insert > Chart** path highlighted. An Excel window titled "Chart in Microsoft Word" is open, showing the following data table:

	Series 1	Series 2	Series 3
1			
2	Category 1	4.3	2.4
3	Category 2	2.5	4.4
4	Category 3	3.5	1.8
5	Category 4	4.5	2.8

Below the table, a 3D bar chart is displayed with the title "Chart Title". The chart shows three series (Series 1 in blue, Series 2 in orange, and Series 3 in grey) grouped by category. The y-axis ranges from 0 to 6. A legend at the bottom identifies the series.

## Formatting Charts

To add elements to a chart, click on the chart and then click **Chart Tools > Design > Add Chart Element**.

A chart title, axis titles and data labels can be added. An option to display the original data in a table beneath the chart is also available.

The screenshot shows the 'Add Chart Element' menu with the following options: Axes, Axis Titles, Chart Title, Data Labels, Data Table, Error Bars, Gridlines, Legend, Lines, Trendline, and Up/Down Bars. The 'Data Table' sub-menu is open, showing 'None', 'With Legend Keys' (selected), 'No Legend Keys', and 'More Data Table Options...'. The chart below is a clustered bar chart with the following data table:

	Category 1	Category 2	Category 3	Category 4
Series 1	4.3	2.5	3.5	4.5
Series 2	2.4	4.4	1.8	2.8
Series 3	2	2	3	5

The colours to be used in the chart can be selected by double clicking on the required area then choosing from the different Fill options which appear on the right. To edit the data in the graph, click **Chart Tools > Design -> Edit Data** and the Excel sheet will be displayed again.

The screenshot shows the 'Edit Data' dropdown menu with the following options: Edit Data and Edit Data in Excel. The 'Edit Data' option is selected.

## Mail Merge - Data Source

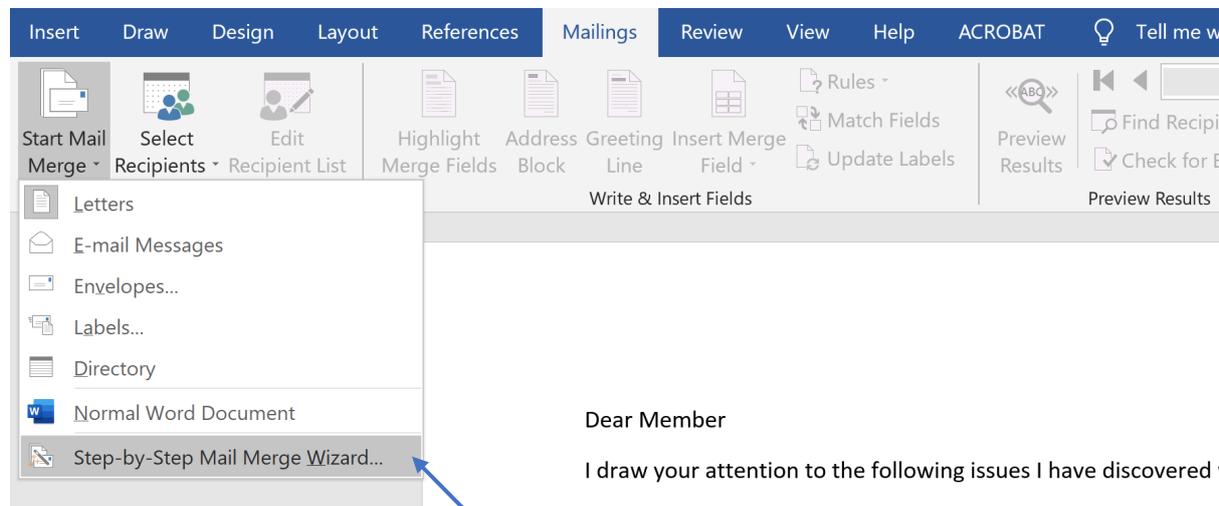
To create a mail merge a source of data from which to retrieve recipient information should be created.

The data source can be a table in Word or Excel containing columns of data for all the unique information that will be included the letter e.g. Name, Address etc.

Name	Email Address	Address
John	john@nowhere.com	1 Nowhere Street Brighton
Mary	mary@nowhere.com	2 Nowhere Street Brighton
Harry	harry@nowhere.com	3 Nowhere Street Brighton
Lisa	lisa@nowhere.com	4 Nowhere Street Brighton
Lynne	lynne@nowhere.com	5 Nowhere Street Brighton
James	james@nowhere.com	6 Nowhere Street Brighton
Kirsty	kirsty@nowhere.com	7 Nowhere Street Brighton

## Mail Merge Wizard for Letters

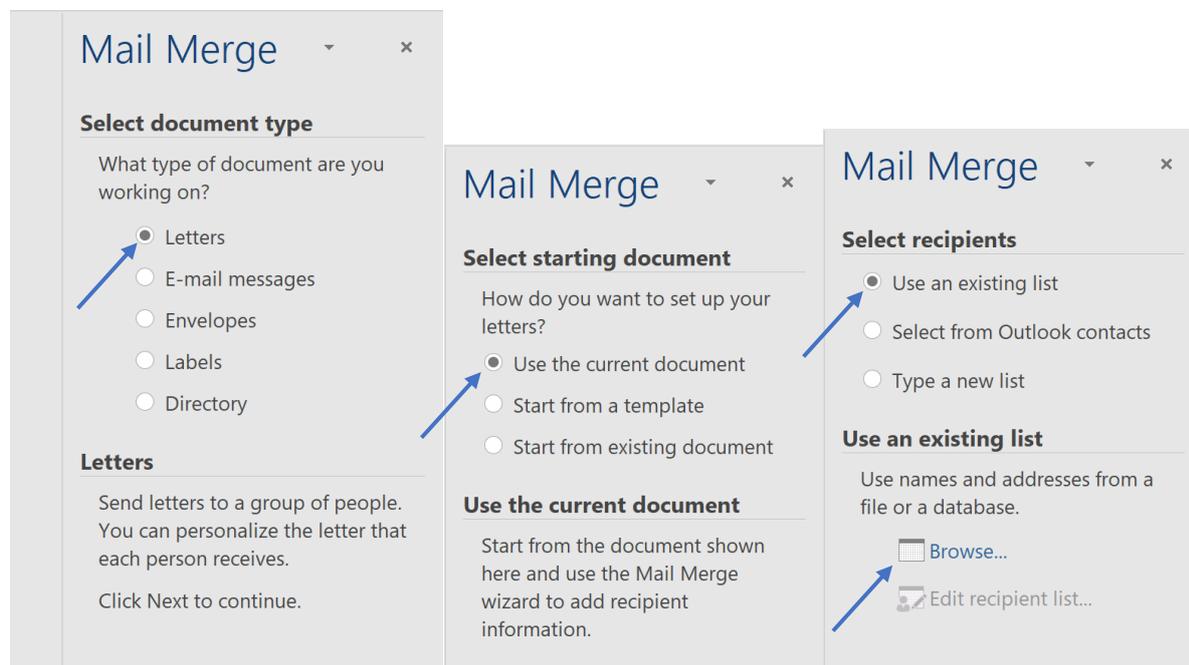
The easiest way to use mail merge is with the Mail Merge Wizard. Open the letter to be used for the merge then click **Mailings > Start Mail Merge > Step by Step Mail Merge Wizard**.

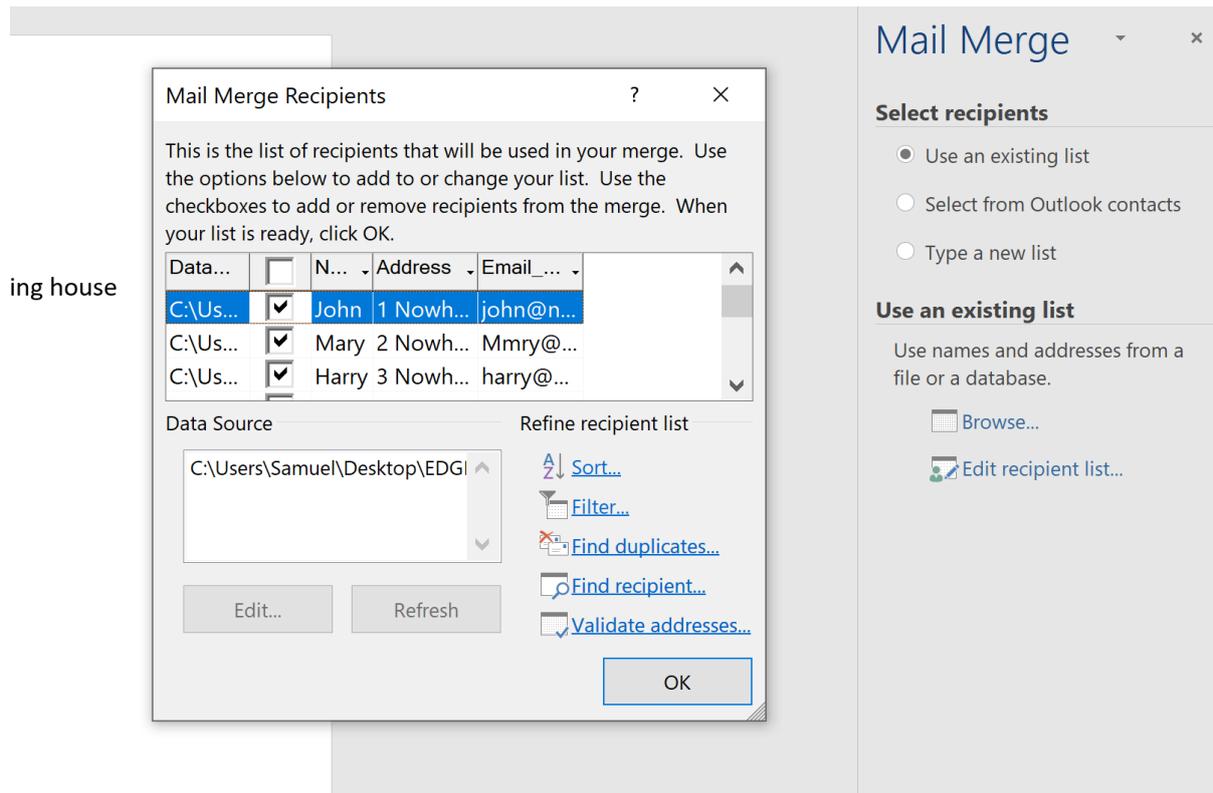


A dialog box will appear on the right, select **Letters** then click **Next**.

Click Use **Current Document** and click **Next**.

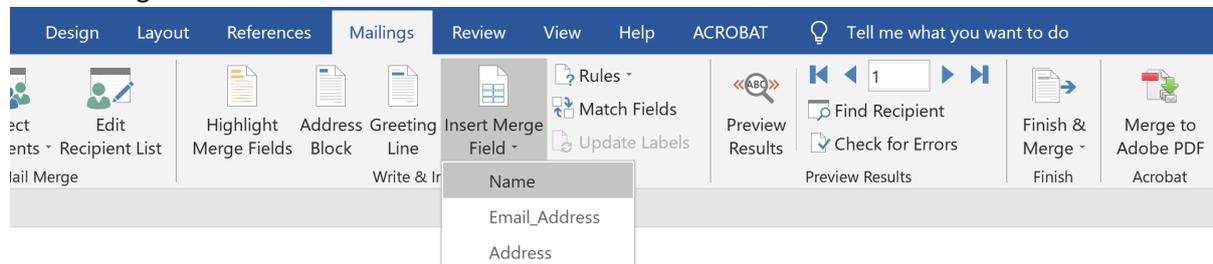
Click **Use an existing list** then browse for the data source file.





Click **OK** then insert merge fields into the letter in the appropriate places by clicking **Insert Merge Field** and choosing from the options listed, which link to the data source.

### Insert Merge Fields



«AddressBlock»

«Email\_Address»

Dear «Name»

I draw your attention to the following issues I have discovered with the roof of our meeting house

## Using IF in Mail Merge

To optionally change the insertions based on a field type click **Mailings > Rules > IF... Then... ELSE...** Should it be required that all letters sent to men begin with Dear Sir and all sent to women begin Dear Madam for example, a rule stating this could be used (assuming the gender of each person has been included in the original data source).

## Outputs in Mail Merge

To merge the addresses and the letter click **Preview Results** then complete the merge by clicking **Finish & Merge**.

To save the letters in a new document click **Finish & Merge > Edit Individual Documents**.

## Filtering in Mail Merge

The data source can be filtered by clicking **Edit Data Source** and specifying the criteria; as an example, the filter could be used to only send people living within a certain area a letter.