MICROSOFT WORD 2010/2007 ON A PC (MERGING EXCEL DATA INTO WORD)

1. Selecting Excel Data to Merge

- Select Excel worksheet with students' scores and comments
    - o Open the Word document that contains the appropriate score sheet.
    - o In this Word document, select the Excel file with students' scores and comments. Choose Mailings → [Start Mail Merge] Select Recipients → Use Existing List, and then find the appropriate Excel file.
    - o The resulting "Select Table" dialog box will contain all worksheets and named cells or ranges in the Excel file. Select the worksheet that contains students' scores and comments. Assuming you used a header row, ensure that the "First row of data contains column headers" option is turned on.
- Edit or sort recipient list – You can sort, filter, or remove student rows when merging data from Excel. Choose Mailings → [Start Mail Merge] Select Recipients → Edit Recipient List, and then select the appropriate function (e.g., sort) or uncheck student rows that you do not want.

2. Entering Merged Data in Word

- For each location in Word where you want Excel data to appear (note: you can have the same Excel data appear in multiple locations in the Word document):
    - o Position cursor where you want the data to appear in Word.
    - o Choose Mailings → [Write & Insert Fields] Insert Merge Field, and then select the appropriate Excel field.
- You will see the field name (e.g., <<TotalPts>>) instead of the actual data, unless the "Preview Results" option is turned on (see "Viewing Students' Scores & Comments" below).

3. Viewing Students' Scores & Comments

- Display actual data from Excel – Mailings → [Preview Results] Preview Results (note: this button toggles the preview on/off; when off, you will see the field names instead of the actual data).
- Navigate to other students – In the Preview Results area, there are buttons for First Record, Previous Record, Next Record, Last Record, and Find Recipient. The number in the box represents the record number you are currently previewing (note: you can change this number directly to display another student's data).

4. Printing Score Sheets

- To print one or more student score sheets, use one of the following methods:
    - o Mailings → [Finish] Finish & Merge → Edit Individual Documents – This method allows you to create a separate, single Word document with one or more student score sheets. The new Word document will have only the actual data from the Excel file; it will not have merged fields and, therefore, will not be automatically updateable if you change any of the data in the Excel file.
    - o Mailings → [Finish] Finish & Merge → Print Documents – This method allows you to print one or more student score sheets to an attached printer.
    - o Mailings → [Acrobat] Merge to Adobe PDF – If you have Adobe printing capabilities, this method allows you to print one or more student score sheets directly to individual PDF files.

- <u>Recommendation</u> – If you are going to combine multiple students' score sheets into one Word document or one print job, ensure that each student's score sheet (i.e., the original Word document) is an even number of pages to allow for double-sided printing.

- <u>"Normal" Print</u> – If you perform the "normal" print function in Word, the currently displayed record (i.e., student score sheet) will be printed.

5. *Miscellaneous*

- <u>Opening Word file with merged data</u> – When you open a Word document with merged data, you will get a message that indicates "Opening this document will run the following SQL command . . . Do you want to continue?" Click the "Yes" button. Sometimes, you will then get an "Error has occurred" message (note: this often happens if you have moved the location of the Excel file or you are working on a different computer). If you get such an error, click the "OK" button as many times as needed until you see a "Find Data Source" button. Click "Find Data Source" button and then select the appropriate Excel file as you originally did when merging data (see "Selecting Excel Data to Merge" above).

- <u>Changing data in Excel file</u> – Even after merging Excel data into Word, you can still change the data in Excel. To do so, you must close the Word document first. Then, open the Excel file, make the appropriate changes, and save and close the Excel file. Finally, open the Word document to view and print this updated data (see "Viewing Students' Scores and Comments" and "Printing Score Sheets" above).

- <u>*Field Shading*</u> – Word can shade fields (e.g., merged fields, table of contents/authorities fields, page numbers, etc.) so that you can more easily determine where updateable fields are located within a Word document. To set this option, choose File → Options → Advanced (in Word 2010) or Office Button → Word Options → Advanced (in Word 2007). Then set "Field shading" to desired level—Always, Never, or When selected. Such shading will not appear when you print the document (note, however, that the "Highlight Merge Fields" option will highlight/shade only merged fields and such highlighting/shading from this option will be printed).