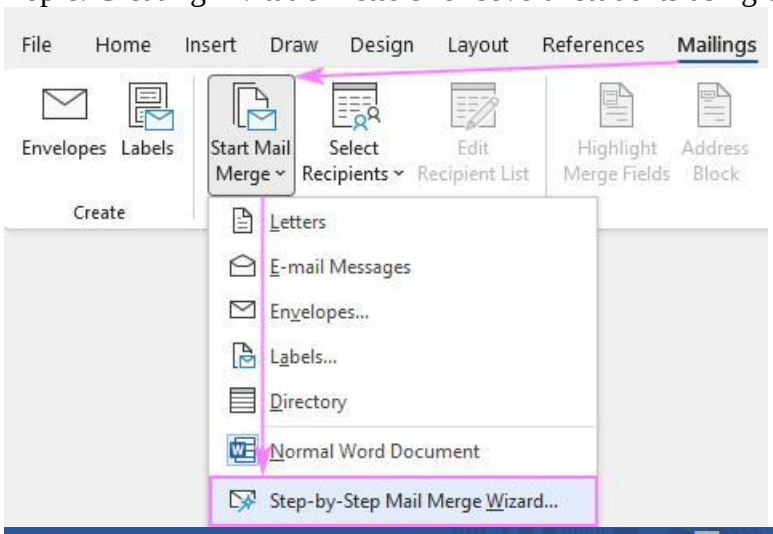
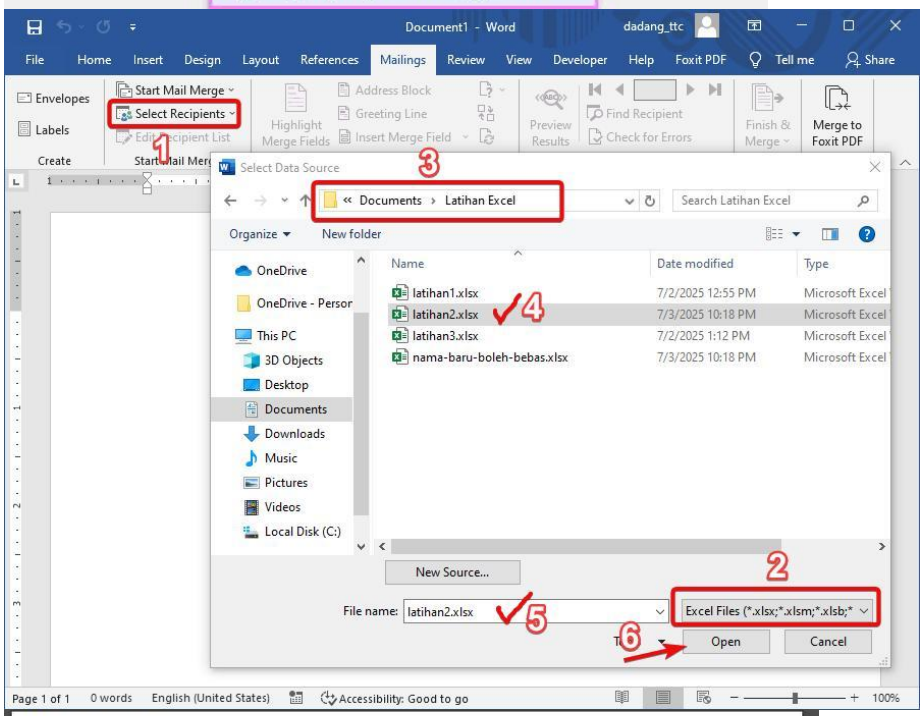
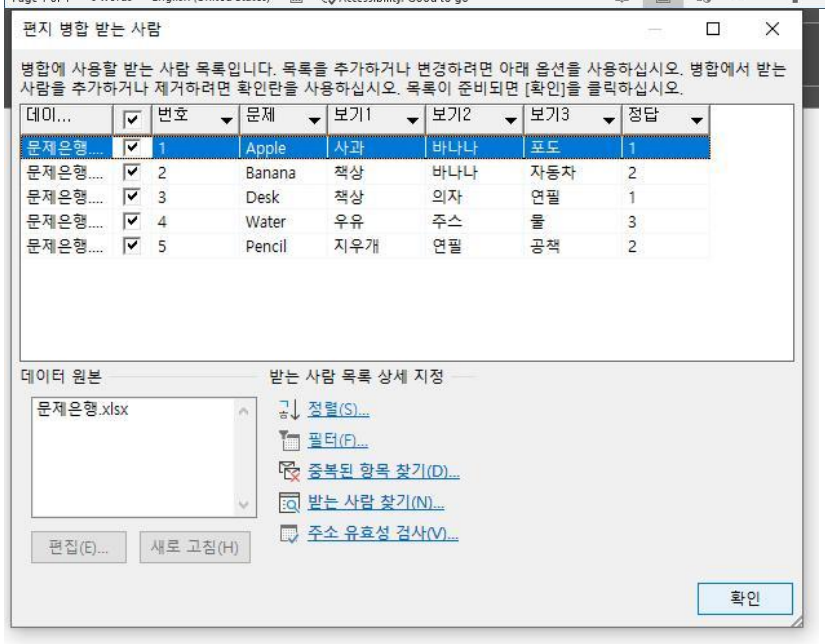
SS1 : Practical Lessons on Mail Merge, Macros and Templates

Practical 1: Mail Merge in Microsoft Word

Topic: Creating invitation letters for several students using one letter.







What is Mail Merge?

Mail Merge is a feature in Microsoft Word that combines a main document with a list of information to produce many personalised documents.

For example, a school wants to send invitation letters to 30 parents. Instead of typing 30 separate letters, the school prepares one letter and a list of parents. Mail Merge inserts each parent's name and address automatically.

What students need

- A computer with Microsoft Word.
- Microsoft Excel, or a list of recipients that Word can use.
- A keyboard and mouse.

Activity A: Prepare the recipient list

Step 1: Open Microsoft Excel.

Step 2: Enter the following information into the worksheet, starting from cell A1.

FirstName	Surname	Class	ParentName
Ada	Okafor	SS1A	Mrs Okafor
Musa	Bello	SS1B	Mr Bello
Grace	Johnson	SS1A	Mrs Johnson
David	Adeyemi	SS1C	Mr Adeyemi

Important: The first row contains the column headings. Do not leave blank rows between the headings and the records.

Step 3: Save the file as `SS1_Students.xlsx` in the Documents folder.

Activity B: Create the main letter

Step 4: Open Microsoft Word and create a blank document.

Step 5: Type the following letter, leaving spaces where the personal details should appear.

TOPMAX CITY COLLEGE
Lagos, Nigeria
Dear Parent,
You are invited to attend our Parents' Meeting for [Student Name], who is in [Class].
The meeting will take place on Friday at 10:00 a.m. in the school hall.
We look forward to seeing you.
Yours faithfully,
The Principal

The bracketed items are placeholders. You will replace them with Mail Merge fields in the next steps.

Activity C: Connect the Excel list to Word

Step 6: In Word, click the Mailings tab.

Step 7: Click Start Mail Merge, then select Letters.

Step 8: Click Select Recipients, then choose Use an Existing List.

Step 9: Find and select `SS1_Students.xlsx`, then select the worksheet containing the student records. Confirm that the first row contains column headers if Word asks.

Activity D: Insert the merge fields

Step 10: In the letter, replace `[Student Name]` with a merge field.

- Put the cursor where the student's name should appear.
- Click Mailings → Insert Merge Field.
- Select `FirstName`.
- Type a space, then insert `Surname`.

Step 11: Replace `[Class]` with the `Class` merge field.

Step 12: If you want the letter addressed personally to each parent, change `Dear Parent,` to `Dear` followed by the `ParentName` merge field and a comma.

Activity E: Preview and complete the letters

Step 13: Click Preview Results on the Mailings tab.

Use the arrow buttons to move between recipients. Check that the names and classes change correctly.

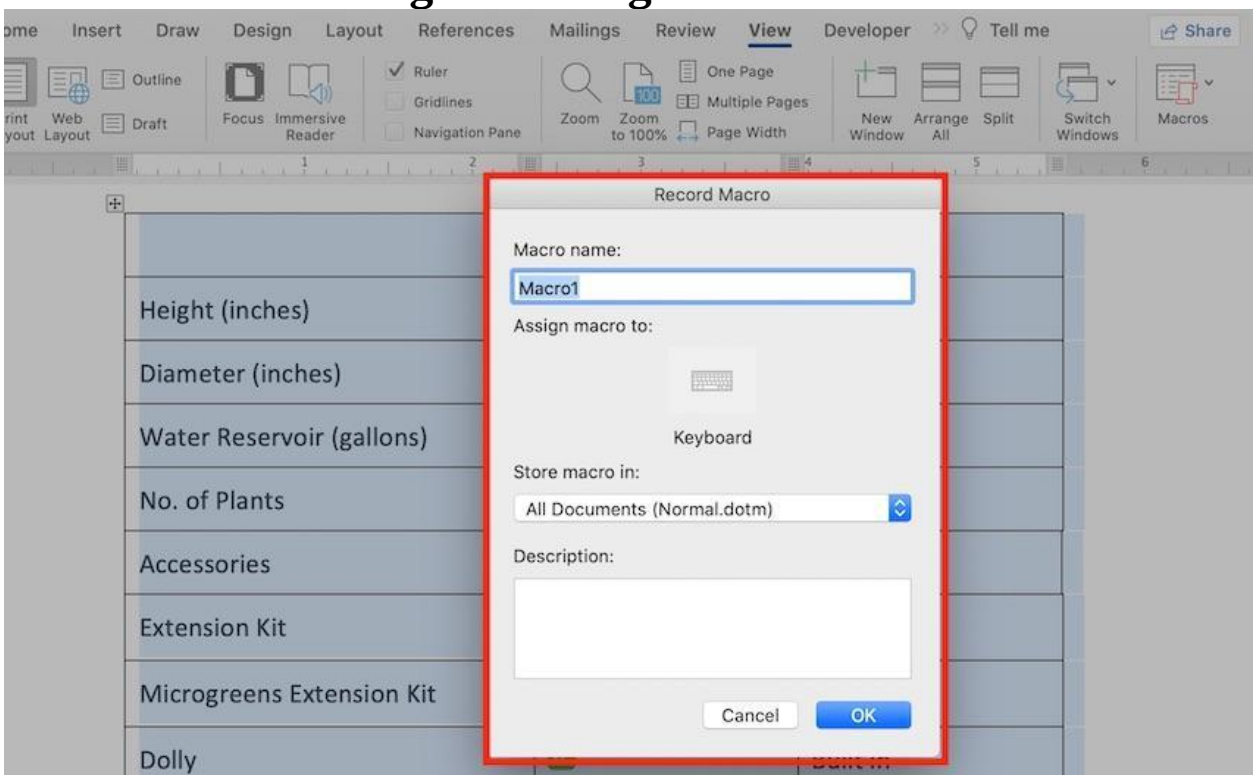
Step 14: Click Finish & Merge → Edit Individual Documents → All.

Word will create a new document containing the personalised letters for the four students.

Step 15: Save the merged document as `Parents_Meeting_Letters.docx`.

Expected result: Four personalised letters are created from one main letter and the Excel list.

Practical 2: Creating and Using Macros in Microsoft Word



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What is a Macro?

A macro is a recorded or programmed set of instructions that allows a computer application to perform repetitive tasks automatically.

For example, a teacher may need to type the heading TOPMAX CITY COLLEGE – CONTINUOUS ASSESSMENT and format it in bold, centred, blue text every time a new test paper is prepared. A macro can automate these actions.

What students need

- A computer with the desktop version of Microsoft Word.
- A keyboard and mouse.
- A document in which to practise.

Activity: Record a macro to format an examination heading

The aim is to create a macro called `ExamHeading` that inserts and formats a heading automatically.

Step A: Display the Developer tab

Step 1: Open Microsoft Word.
Step 2: Click File → Options.
Step 3: Select Customize Ribbon.
Step 4: Under the list of main tabs on the right, tick Developer.
Step 5: Click OK.
The Developer tab should now appear on the Word ribbon.
Note: These instructions are for the desktop version of Word on Windows. The menu may differ slightly in other versions.

Step B: Record the macro

Step 6: Create a blank Word document.
Step 7: Click Developer → Record Macro.
Step 8: In the macro name box, type:

```
ExamHeading
```

Macro names should not contain spaces.
Step 9: Choose All Documents (Normal.dotm) if you want the macro to be available in other Word documents on that computer. Otherwise, save it in the current document if the macro is only for that file.
Step 10: Click OK. Word will begin recording your actions.
Be careful: Word records the actions you perform, so avoid unnecessary clicks and movements.

Step C: Perform the actions you want to automate

While recording, follow these instructions:

Step 11: Type:
`TOPMAX CITY COLLEGE`
Step 12: Press Enter and type:
`CONTINUOUS ASSESSMENT`
Step 13: Select both lines.
Step 14: Apply the following formatting:

- Make the text bold.
- Centre-align the text.
- Change the font size to 16.
- Change the font colour to blue, if available.

Step 15: Click Developer → Stop Recording.
Your macro has now been recorded.

Step D: Test the macro

Step 16: Open a new blank Word document.
Step 17: Click Developer → Macros.
Step 18: Select `ExamHeading`.
Step 19: Click Run.
If the macro was recorded correctly, the heading should appear with the formatting you applied.
Expected result: Students can insert a standard examination heading without repeating the same formatting steps manually.

What are macros used for?

Macros can help users:

1. Format examination papers.
2. Insert standard headings.
3. Apply repeated document layouts.
4. Perform repetitive editing tasks.
5. Automate certain office procedures.

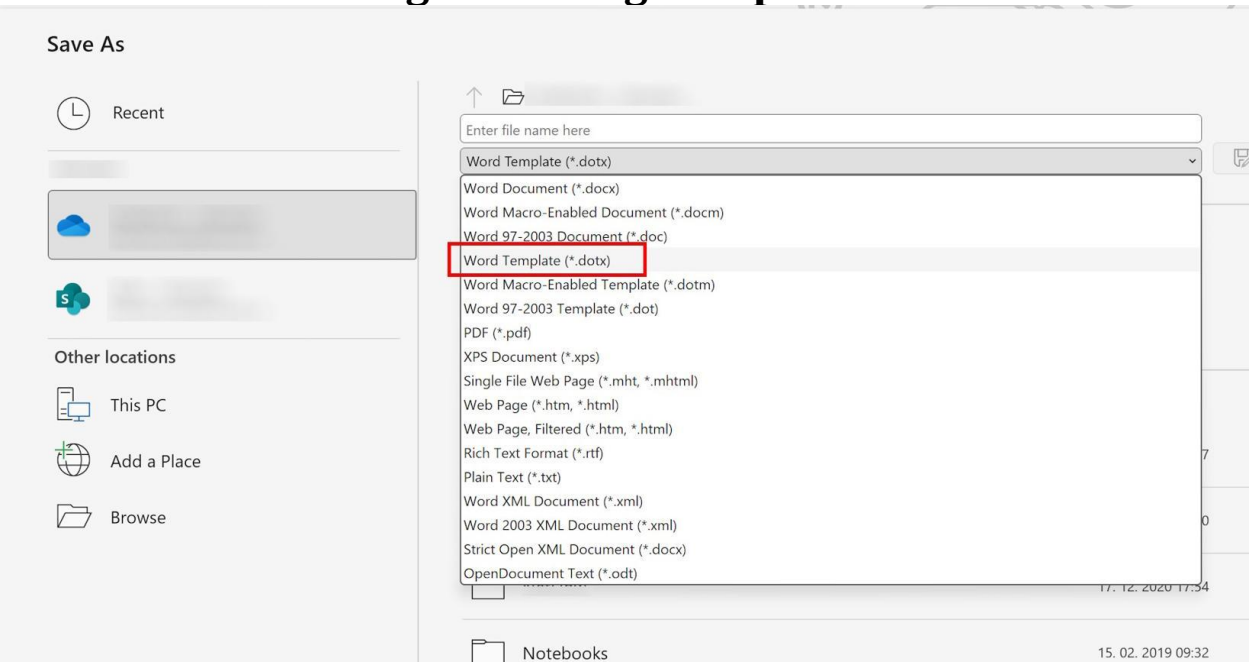
Important safety note

Only run macros from trusted sources. A macro can contain harmful instructions, so students should not enable unknown macros just because a document asks them to.

Student practice

Record a second macro named `SchoolAddress` that inserts the school's name, address and telephone number into a document.
Test the macro in a new document and confirm that all the information appears correctly.

Practical 3: Creating and Using Templates in Microsoft Word





What is a Template?

A template is a pre-designed document that provides a standard layout and formatting for creating new documents.

For example, a school may create a letter template containing its name, logo, address and standard letter layout. Teachers can reuse it whenever they need to write official letters.

A Word template normally uses the `.dotx` file extension. A template containing VBA macros uses `.dotm`.

Activity: Create a school letter template

Aim: To design a reusable letterhead for school correspondence.

Step A: Create the document

Step 1: Open Microsoft Word.

Step 2: Select Blank Document.

Step 3: At the top of the page, type:

TOPMAX CITY COLLEGE

Soretire Street, off College Road, Lagos

Email: info@topmaxschools.com

Date: _____

Recipient's Name: _____

Address: _____

Dear _____,

Subject: _____

Type the body of your letter here.

Yours faithfully,

Principal

Step 4: Select the school name and make it bold, centre-aligned and larger than the other text.

Step 5: Format the address and email neatly.

Step 6: Add the school logo if one is available. To do this, use Insert → Pictures and select the logo image.

Step 7: Adjust the margins, font type, font size and spacing to make the letter look professional.

Step B: Save the document as a template

Step 8: Click File → Save As → Browse.

Step 9: Enter the file name:

`Topmax_School_Letter`

Step 10: Open the Save as type list and select Word Template (*.dotx).

Step 11: Save the file.

Your school letter template is now ready for reuse.

Step C: Create a new letter from the template

Step 12: Locate the saved `.dotx` file in File Explorer.
Step 13: Double-click the template file. In the normal desktop version of Word, this should create a new document based on the template rather than opening the template itself for editing.
Step 14: Fill in the recipient's name, address, date, subject and body of the letter.
Step 15: Click File → Save As and save the new letter as:
`Invitation_Letter.docx`
Step 16: Close the new letter, then open the template again to create another letter.
Notice that the original template remains unchanged when you edit and save the new document separately.
Expected result: Students can produce several letters with the same professional design without designing each letter from scratch.

Other examples of templates

- Examination question paper templates.
- Student report card templates.
- School admission letter templates.
- Business invoice templates.
- Meeting minutes templates.
- Curriculum vitae (CV) templates.
- Certificate templates.

4. Differences Between Mail Merge, Macros and Templates

Feature	Main purpose	Practical example
Mail Merge	Produces many personalised documents using a data list.	Sending admission letters to 50 students.
Macro	Automates repetitive actions.	Automatically formatting an examination heading.
Template	Provides a reusable document design.	Creating a standard school letterhead.

5. Class Practical Assessment

☐ Mail Merge
Create an Excel list of five students and use Word Mail Merge to produce five personalised invitation letters.
☐
2. Macro
Record a macro that inserts and formats the heading COMPUTER STUDIES TEST.
☐
3. Template
Create a school letterhead template and use it to produce two different letters.
0 of 3 practical activities completed

6. Questions for Revision

1. Define Mail Merge and state three items required to perform it.
2. What is a data source in Mail Merge?
3. Explain five steps involved in recording and running a macro.
4. State three advantages of using macros.
5. Define a template and explain how to create one in Microsoft Word.
6. Give four examples of documents that can be created from templates.
7. Differentiate between Mail Merge and a macro.
8. Explain why a template should be saved separately from the letters created from it.

Teacher's tip: Let students complete these exercises on actual computers rather than merely copying the notes. For Mail Merge, check that every student's name changes in the generated letters. For macros, ask them to run the macro in a fresh document. For templates, verify that the original design remains unchanged after they create and save a new letter.