SS2 - Advanced Word Processing

Mail Merge, Macros and Templates | Senior Secondary School 2 | Computer Studies

Mail Merge

Mail merge combines one main document with a list of records to create many personalised copies. The main document contains the common message. The data source contains changing information, such as each student's name and class. A merge field marks where a value from the list should appear.

Example: A school sends the same invitation to 40 parents. Instead of typing 40 letters separately, the school writes one letter and merges it with a parent list.

Part	Example
Main document	Dear «ParentName», you are invited to our Open Day.
Data source	A table with ParentName, StudentName and Class columns.
Merged output	Dear Mrs Adeyemi, you are invited to our Open Day.

Steps to create a mail merge in Word

1. Prepare an Excel sheet or Word table. Put field names in the first row, one person per row, and save it.
2. Open Word and type the common letter. Go to Mailings > Start Mail Merge > Letters.
3. Choose Select Recipients > Use an Existing List, then open your data file.
4. Place the cursor where a name should appear. Choose Insert Merge Field and select the matching field.
5. Choose Preview Results and check several records for spelling, spacing and missing data.
6. Choose Finish & Merge to print or create individual documents. Save the main document and data list.

Sample data: ParentName = Mrs Adeyemi; StudentName = Tobi Adeyemi; Class = SS2. In the letter write: "Dear «ParentName», the parent of «StudentName» in «Class» is invited to Open Day."

Uses include school fee reminders, admission letters, certificates, envelopes and address labels. Check the data before printing: a wrong row or blank field can appear in every final copy.

Macros

A macro is a saved sequence of commands that performs a repeated task automatically. For example, a teacher can record a macro that inserts a heading and applies the same font and spacing to every weekly test. Word macros can be recorded without writing code; more complex ones use Visual Basic for Applications (VBA).

How to record a simple macro

- In Word, choose View > Macros > Record Macro (or use the Developer tab).
- Give it a clear name without spaces, such as FormatTestHeading, and choose where to store it.
- Perform the formatting steps you want Word to remember.
- Choose View > Macros > Stop Recording.
- To use it, choose View > Macros > View Macros, select the name and click Run.

Macro safety: Only enable macros in files from people you trust. A macro can contain harmful commands. Word may ask you to save a macro enabled document as .docm; an ordinary .docx cannot store VBA macros.

3 Templates

A template is a reusable starting document with a prepared layout, styles and sometimes placeholder text. A school can prepare a lesson note template containing its name, subject, class, date, objectives and teacher's name. Each new note starts with the same layout but receives different content.

How to create and use a template

- Create and format a sample document in Word, including headings, tables and placeholders.
- Choose File > Save As and select Word Template (.dotx). Give it a meaningful name.
- To make a new document, choose File > New > Personal or Custom and select your template.
- Complete the new document and save it as a .docx file. The original template stays available for reuse.

A .dotm template can contain macros; a .dotx template cannot. Templates save setup time and help documents from the same school look consistent.

Comparison

Feature	Main purpose	School example
Mail merge	Personalise one message for many recipients	Parent invitation letters
Macro	Repeat a set of actions automatically	Format test headings
Template	Reuse a prepared document layout	Lesson note format

Class activity

Create a list of five fictional parents with ParentName, StudentName and Class. Merge it with an invitation to a school Open Day. Preview all five letters. Then design and save a simple lesson note template. If macros are available on your computer, record a macro that makes a selected heading bold and centred.

Evaluation questions

- What are the main document, data source and merge field?
- List four steps in producing personalised letters with mail merge.
- What is a macro? State one use and one safety rule.
- What is a template? Explain the difference between .dotx and .docx.
- Which feature would you choose for 100 fee reminder letters, and why?