COMPLETE LEARNING MODULE: MAIL MERGE IN MICROSOFT WORD

Mail Merge in Microsoft Word

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EDCI 572

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Mail merge is one of the features of Microsoft Word that allows for efficiency and productivity in the modern work place. An employee who is able to generate scores form letters within the time frame that it would otherwise take that person to produce possibly dozens. As a result of my experience both using and teaching this topic. I will be taking a SME approach to this module. The lesson also results from what is known about the populations' skills in regard to their interfacing with secular education. This point will be covered in the Learner Analysis.

The "Crown Heights Community Health" program seeks to provide participants in the program skills that can place them in the mid-management track within real estate management industry in particular and other businesses in general. Amongst a repertoire of hard skills and soft skills that they must have; communication skills are one of them. Mail merge falls into communications. Mail merge is a process that generates personalized documents as opposed to generic non-personalized materials. The mail merge process can be used to generate invoices and letters in a Word form, using customer data from an Access or Excel database. This level of productivity can translate into an increased bottom-line for an organization.

Many mail merge modules teach the procedure using the "wizard." This module will focus on the Mailings tab. `In this module I don't intend to go over every option on the toolbar. The intention is to provide details on the critical icons needed to complete the most mail merge process.

The first three buttons are pretty important. In order from left to right:

- **Start Mail Merge:** This step prepares the application for the mail merge procedure.
- **Select Document Type:** This button provides the choice of choosing what type of main document the learner would like to create.
- **Create Data Source:** This critical feature allows the learner to create a contact list (known as a data source) or use an existing one previously created.

This module will be presented in a blended format. Students will be provided a face-to-face demonstration as well as have access to an online video display and exposition of the steps in the process.

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Gap Analysis

Desired Status	-	Actual Status	=	Need
Students will be able to Mail Merge letters to be sent to tenants.		Students are only able to develop one addressed business letter at a time.		A tutorial that will demonstrate how to mail merge.

Working with creating two documents, there are three primary steps in a mail merge process. The first two can be done in any order. Firstly, the data source (list of names and addresses must be developed.) The learner must categorize the type of information they will gather. The data source is the variable part of the process. This process is like developing a form. The names will change from one completed document to another. Hence, I refer to this as the variable. Secondly, is the main document. The main document is the text that all recipients will receive in message. I refer to the main document as the constant.

Participants will learn the process of developing the data source, type a full block business letter, insert data fields from the data source into the main document, then perform the merge to complete the process.

Goal for Final Project

Adult learners in the Crown Heights Community Health (CHCH) program will be able to use Microsoft Word to complete the mail merge procedure to generate letters for five recipients.

List of Steps Leading to Main Goal

1. Start Microsoft Word
2. Start mail merge & select document type
3. Create the data source
4. Create the main document
5. Insert merge fields into the main document
6. Preview results
7. Check for errors
8. Finish and merge
9. View merged documents
10. Close

Goal Analysis Diagram

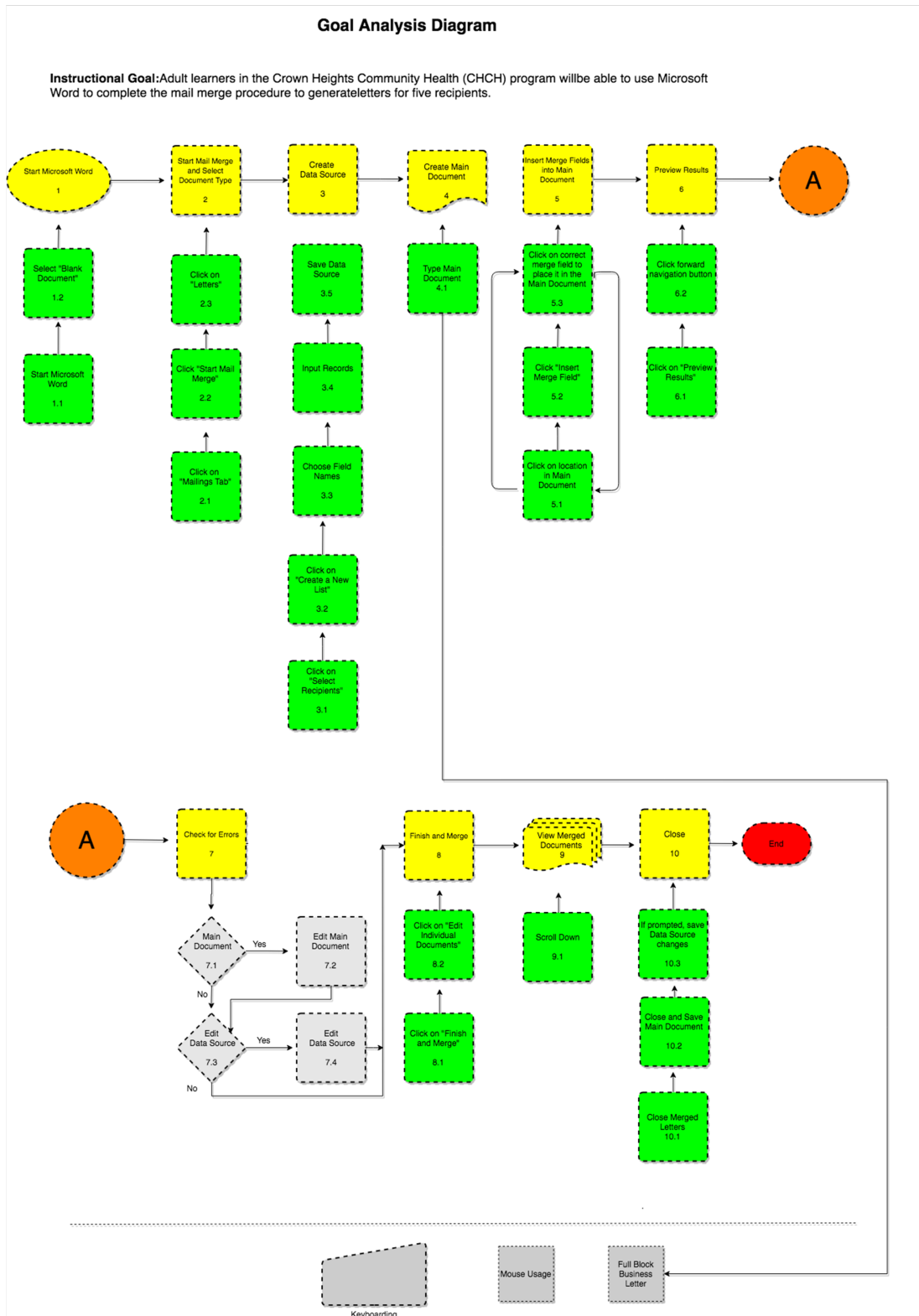## Goal Analysis Diagram

Instructional Goal: Adult learners in the Crown Heights Community Health (CHCH) program will be able to use Microsoft Word to complete the mail merge procedure to generate letters for five recipients.

Start Microsoft Word
1

Start Mail Merge and Select Document Type
2

Create Data Source
3

Create Main Document
4

Insert Merge Fields into Main Document
5

Preview Results
6

A

Select "Blank Document"
1.2

Click on "Letters"
2.3

Save Data Source
3.5

Type Main Document
4.1

Click on correct merge field to place it in the Main Document
5.3

Click forward navigation button
6.2

Start Microsoft Word
1.1

Click "Start Mail Merge"
2.2

Input Records
3.4

Click "Insert Merge Field"
5.2

Click on "Preview Results"
6.1

Click on "Mailings Tab"
2.1

Choose Field Names
3.3

Click on location in Main Document
5.1

Click on "Create a New List"
3.2

Click on "Select Recipients"
3.1

A

Check for Errors
7

Finish and Merge
8

View Merged Documents
9

Close
10

End

Main Document
7.1 — Yes — Edit Main Document 7.2

No

Click on "Edit Individual Documents"
8.2

Scroll Down
9.1

If prompted, save Data Source changes
10.3

Edit Data Source
7.3 — Yes — Edit Data Source 7.4

No

Click on "Finish and Merge"
8.1

Close and Save Main Document
10.2

Close Merged Letters
10.1

Keyboarding

Mouse Usage

Full Block Business Letter

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IDer Reflection

I am familiar with the mail merge process. However, this is the first time that I have seen the steps laid out as displayed in the design diagram. In regard to the ID process, I understand the importance of the gap analysis, establishing the goal for final project in clear terms. Developing the list of steps leading to main goal, and creating the goal analysis diagram

I am pleased with the progress of the project thus far. As I researched information on mail merge, I came across an interesting connection between mail merge and computer programming. Mail merge can be used as an introductory programming language. (Popyack & Herrmann (1993). Granted it is beyond the scope of this module. However, I found it worth the mention. I also found an article that demonstrated how to use mail merge to generate individualized assessments. Hollebrands & Stohl (2004). My main challenge was configuring the goal analysis diagram on a page. I decided to use a larger page format in addition to placing it in landscape orientation.

My peers have provided constructive feedback. It was suggested that I identify my target learners. I have made the change. This identification will be congruent with the learner analysis. It was also suggested that I use a "hump" to indicate that two crossing lines have nothing to do with each other. I did not take this suggestion; I reconfigured the design diagram to avoid crossing lines. One of my peers suggested that I include assessment related materials in the design diagram. I rejected this suggestion as it is beyond the scope of the current assignment. This will be addressed in subsequent components of this design document. It was also suggested that I clarify the terms "insert merge field" and "insert selected field." I clarified the ambiguity in the design diagram.

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Learner Analysis

The target learners for this module are 21-28-year-old Hasidic men in Brooklyn, New York City. Information was obtained from an interview, in addition to published information.

In conversation with the program director, I learned that the target learners are highly disciplined learners. However, this discipline has been geared towards religious learning. The learners are Yeshiva graduates. For many, secular learning is something they have limited exposure to. As such, according to the executive director of the program, they lack the skills required to participate in the workforce.

According to Eli Berman (2000), "the labor supply of Ultra-Orthodox men is low and falling. By the mid-1990s labor force participation among Israeli Ultra-Orthodox men had dropped to one-third. They remained out of the labor force on average until age 40 in order to study full-time in yeshiva, religious seminaries that provide almost no practical training." (p. 5) A haaretz.com article states, "They spend seven and a half hours a day on religious studies and just 90 minutes, in late afternoon, on English and math. By the time they reach their teens, even that very limited exposure to the world of learning beyond Torah pretty much come to an end."

Research has also shown that there may be an existing language barrier. According to the New York Times, over sixty-five percent of the students in the Jewish schools are categorized as English Language Learners. Yiddish is the primary language of instruction at two-thirds of the city's 250 Jewish schools. Davidman and Greail, (2007) state, "In some groups, where Yiddish rather than English is the primary language of everyday life, language, too, can contribute to boundary maintenance." (p. 7)

Information Categories	Data Sources	Learner Characteristics
List category name	List data source	Describe characteristics
Entry Skills	Interview with Executive Director	Most of the learners, as a result of having little to know experience with electronic technology have low level technical skills.

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Prior Knowledge	Interview with Executive Director	Learners may have some knowledge of the program, but the majority are not expected to have any knowledge of Microsoft Excel due to their past educational experiences.
Attitudes toward Content	Interview with Executive Director	Learners enter the program voluntarily. Within this context, they believe the content can serve for beneficial development of their quality of life.
Attitudes toward Delivery System	Interview with Executive Director	For most of the learners this will be the first time they experience the technology that will be used in this module. As such, it is expected that they will be excited about the experience.
Motivation for Instruction	Interview with Executive Director	This is a voluntary program. Learners are expected to be motivated and ready to learn in order to make a positive change in their lives for themselves and their families.
Education and Ability Levels	Interview with Executive Director	The learners are graduates of community yeshivas and do not have limited formal secular education. The program admits them if they are reading English on an eight-grade level.
General Learning Preferences	Interview with Executive Director	Based on pass learning experiences the learners prefer to work independently.
Attitudes Toward Training Organization	Interview with Executive Director	The learners have a positive attitude of the organization sponsoring the course.
General Group Characteristics	Interview with Executive Director / Research	Heterogeniety exist among the learners in terms of culture and learning experiences. They also are in the same general age bracket. This course is limited to 15 learners for the sake of being able to reach learners on an individual basis.

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Performance Context

The CHCH program intends to place the participants in internships. Based on discussion with the

program executive director, the learners will be placed in real estate management office environments

where they will have the equipment to use the skills learned within this design document. Learners will

use the capacities they developed to send letters to tenants as needed based on individualized

situations within a general framework; for example, if many tenants are scheduled to have an inspection

of their apartment conducted. This environment will also facilitate professional development. In this

context, they will have the managerial support that aims to develop them into hires and then into mid-

level managers over time.

Information Categories	Data Sources	Performance Site Characteristics
List category name	**List data source**	**Describe performance site characteristics**
Managerial/Supervisory Support	Interview with Executive Director	Managers will support learners to become mid-level managers. Learners will be intrinsically and extrinsically rewarded in the internship phase of the program.
Physical Aspects of the Site	Interview with Executive Director	Equipment: Desk, desktop computers with MS Office loaded, chairs, and printer
Social Aspects of the Site	Interview with Executive Director	Supported by a supervisor, learners will work independently and in teams as required by the task at hand.
Relevance of Skills to the Workplace	Interview with Executive Director	The skills in this module are skills that are currently being used in the workplace across the country.

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Information regarding the learning context for this module was obtained two-fold: from an interview with the executive director and an in-situ observation of the location. The site is located in a remodeled storefront in Brooklyn, NYC. There is a classroom for the learners where they will have access to computer systems with the necessary technology and one-hundred percent of the tools to achieve the learning goals. If necessary, with assistance, learners will log in to the module via an LMS.

This module will be developed as an asynchronous online module placed within a learning management system (LMS). Learners will also have independent access based on their schedule outside of the classroom. The module will consist of recorded videos with audio tracks narrating the steps required to meet each terminal objective.

Other than the login, all instruction related to this module will be online. The lesson, taking into account the entry-level skills required to complete this module, will consider the target learner may not be able to type an error-free the business letter. As an alternative, the main document will be provided for the learner within the module's files. However, the learners will have to complete 100% of the data source and all proceeding actions to complete the objective of the module.

Information Categories	Data Sources	Learner Site Characteristics
List category name	List data source	Describe Site characteristic
Number/Nature of Sites	In-situ	Site is a classroom converted from a storefront in Brooklyn, NYC.
Site Compatibility with Instructional Needs	In-situ	The site contains desks, computers with all peripherals, internet access, and a SMART Board for instructor demonstrations.
Site Compatibility with Learner Needs	In-situ	The site contains desks, computers with all peripherals, internet access, and a SMART Board for to view instructor demonstrations.
Feasibility for Simulating Workplace / Performance Site	In-situ	Computers contain all commercial software commonly used in the workplace.

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Performance Objectives

Main Instructional Goal	Terminal Objective
Adult learners in the Crown Heights Community Health (CHCH) program will be able to use Microsoft Word to complete the mail merge procedure to generate letters for five recipients.	Given a computer with Microsoft Word **(CN)**, learners will successfully **(CR)** complete the mail merge process and produce letters for five recipients. **(B)**
Main Step to Instructional Goal	Objective
Start Microsoft Word with a Blank Document	Given a computer with Microsoft Word **(CN)**, learners will successfully **(CR)** start Microsoft Word by clicking on the start menu and clicking on the MS Word icon and start a blank document. **(B)**
Subordinate Skill	Objective
1.1 Start Microsoft Word	Given a computer with Microsoft Word **(CN)**, learners will successfully **(CR)** start Microsoft Word by clicking on the start menu and clicking on the MS Word icon. **(B)**
1.2 Select Blank Document	With Microsoft Word started **(CN)**, learners will successfully (**CR**) begin a new document by clicking on "Blank Document." **(B)**
Main Step to Instructional Goal	Objective
2. Start mail merge and select document type	Given a computer with Microsoft Word **(CN)**, learners will successfully **(CR)** begin the mail merge process by clicking on the "Mailings" tab, selecting "Start Mail Merge" then, "Letters." **(B)**
Subordinate Skill	Objective
2.1 Click on "Mailings" tab	With a blank document on the monitor **(CN)**, learners will successfully **(CR)** initiate the mail merge process by clicking on the "Mailings" tab. **(B)**
2.2 Click on "Start Mail Merge"	In the "Mailings" tab **(CN)**, learners will successfully (**CR)** initiate the mail merge process by clicking on the "Start Mail Merge." **(B)**
2.3 Select "Letters" Document Type	Within the "Start Mail Merge" command **(CN)**, learners will successfully **(CR)** choose "Letters" as the Main Document type by clicking on "Letters" in the "Start Mail Merge" drop-down menu. **(B)**
Main Step to Instructional Goal	Objective
3. Create Data Source	With a blank document on the monitor **(CN)**, learners will successfully **(CR)** create the data source and, with

	no errors, type data for five people in a contact list**. (B)**
Subordinate Skill	Objective
3.1 Click on "Select Recipients"	With a blank document on the monitor **(CN),** learners will successfully **(CR)** began developing the data source by clicking on the "Select Recipients" button."**(B)**
3.2 Click on "Create a New List"	Within the "Select Recipients" command **(CN)**, learners will successfully **(CR)** initiate developing a new data source by clicking on the "Create a New List" button."**(B)**
3.3 Choose field names	Within the "Edit Fields List" dialogue box **(CN)**, learners will successfully **(CR)** choose the correct field names for the new data source by selecting them from the list provided in the "Edit Fields List" dialogue box."**(B)**
3.4 Save Data Source	Promptly after choosing the first merge field **(CN)**, the learner will successfully **(CR)** save the data source by placing in "Documents" with the name "Data Source One" **(B)**
3.5 Input Records	With the "Edit List Entries" dialogue box **(CN)**, learners will successfully **(CR)** register five contacts by typing their respective data in the "Edit List Entries" dialogue box.**(B)**
Main Step to Instructional Goal	Objective
4. Create Main Document	With a blank document on the monitor **(CN)**, learners will successfully **(CR)** generate a create a main document by typing a full block business letter with no spelling or grammatical errors. **(B)**
Subordinate Skill	Objective
4.1. Type Main Document	With a blank document on the monitor **(CN)**, learners will successfully **(CR)** generate a create a main document by typing a full block business letter with no spelling or grammatical errors. **(B)**
Main Step to Instructional Goal	Objective
5. Insert Merge Fields into Main Document	With a blank document on the monitor **(CN)**, learners will successfully **(CR)** insert merge fields into the main document by placing the merge field in the correct location in the main document. **(B)**
Subordinate Skill	Objective

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5.1 Click on location in main document	With a complete letter **(CN)**, learners will successfully **(CR)** initiate the process of inserting the merge fields into the main document by clicking in the recipient's address section of the main document. **(B)**
5.2 Click on "Insert Merge Field"	With the mouse activated at the recipient's address **(CN)**, learners will successfully **(CR)** display the list of fields by clicking on the "Insert Merge Field" button. **(B)**
5.3 Click on appropriate merge field to place it in the main document.	Within the "Insert Merge Field" dialogue box **(CN)**, learners will successfully **(CR)** place the correct merge field into the main document by clicking on it. **(B)**
Repeat steps 5.1 – 5.3 until all necessary merge fields have been placed in the main document	
Main Step to Instructional Goal	Objective
6. Preview Results	Given a complete main document **(CN)**, learners will successfully **(CR)** preview the results of the merge by clicking the "Preview Results" button and navigating through the letters. **(B)**
Subordinate Skill	Objective
6.1 Click on "Preview Results" button	Given a complete main document **(CN)**, learners will successfully **(CR)** preview the first personalized letter by clicking the "Preview Results" button. **(B)**
6.2 Click on "Next Record" navigation button	While previewing the first letter **(CN)**, learners will successfully **(CR)** navigate sequentially to the next letter by clicking the "Next Record" button. **(B)**
Repeat step 6.2 until the last record is viewed	
Main Step to Instructional Goal	Objective
7. Check for Errors	While previewing the letters **(CN)**, learners will successfully check for errors in the main document and data source **(CR)** by reading the main document in the preview process and each contact information as the learner navigates forward using the "Next Record" button. **(B)**
Subordinate Skill	Objective
7.1 Check for errors in main document	While previewing the letters **(CN)**, learners will successfully check for errors in main document by reading the main document in the preview process. **(CR)** If errors are found in the main document, the learner will proceed to step 7.3. If no errors are found in the main document, the learner will proceed to step

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	7.4 **(B)**
7.2 If yes, edit main document	Given a complete main document **(CN)**, learners will successfully **(CR)** correct all errors the main document and data source inputting the changes in the current screen. **(B)**
7.3 Check for errors in Recipient list errors	Given a complete main document **(CN)**, learners will successfully (**CR**) check for errors in the data source. by reading the information for each contact to ensure that names are spelled properly, and addresses are correctly inputted for each contact, as the information is previewed. If errors are found in the data source, the learner will proceed to step 7.4. If no errors are found in the main document, the learner will proceed to step 8. **(B)**
7.4 if yes, edit recipient list	Given a complete data source **(CN)**, learners will successfully **(CR)** correct all errors the data source inputting the changes in the "Edit List Entries" dialogue box. **(B)**
Main Step to Instructional Goal	Objective
8. Finish and Merge	Given a complete main document **(CN)**, learners will successfully **(CR)** complete the mail merge process by clicking on the "Finish and Merge" button. (**B**)
Subordinate Skill	Objective
8.1 Click on "Finish and Merge" button	In the Mailings ribbon **(CN)**, learners will successfully **(CR)** complete the mail merge process by clicking on the "Edit Individual Documents" option in the dropdown menu. **(B)**
8.2 Click on "Edit Individual Documents"	While in the "Finish and Merge" drop-down **(CN)**, learners will successfully (**CR**) complete the mail merge process by clicking on the "Edit Individual Documents" option in the dropdown menu. (**B**)
Main Step to Instructional Goal	Objective
9. View Merged Documents	With merged documents on the monitor **(CN)**, learners will successfully **(CR)** view the final merged letters. (**B**)
Subordinate Skill	Objective
9.1 Scroll Down	With merged documents on the monitor **(CN)**, learners will successfully **(CR)** view the final merged letters by scrolling down the screen. (**B**)
Main Step to Instructional Goal	Objective

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10. Close and Save	With merged documents on the monitor **(CN)**, learners will successfully **(CR)** close all windows and save the main document and, If necessary the data source.**(B)**
Main Step to Instructional Goal	Objective
10.1 Close Merged Letters	With merged documents on the monitor **(CN)**, learners will successfully **(CR)** close the merged letters and save them. **(B)**
10.2 Close and Save Main Document	With the main document on the monitor **(CN)**, learners will successfully **(CR)** close the main document and save it. **(B)**
10.3 Save Data Source	With the main document closed **(CN)**, learners will successfully **(CR)** save the Data Source, if prompted. **(B)**

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Assessment Plan

No entry-level test will be accompanying this module. Because the module will be online, learners will be provided with recorded demonstrations of the steps main and subordinate steps required to achieve the learning objective. Learners will be able to rewind and review the video as often as they like as they develop mastery of the procedure.

No pre-test will be accompanying this module. The IDer is working on the assumption, based on the Learners Analysis, that the target population has no experience with the mail merge process of Microsoft Word.

Learners will watch narrated videos, the step-by-step demonstration, then practice the skills required to achieve the learning objective on their computer. After each Horton (2012) Absorb activity, a Horton (2012) Do activity will follow that will allow the learners time to practice the steps.   The learner can view the videos and practice as often as they like using rewind buttons on the videos and embedded practice opportunities.

Criterion-referenced assessments will be used to ensure that learners not only learned the steps, but also understood the concepts, the post-test will consist of fill-in-the-blank, multiple choice, and process questions.

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IDer Reflection

The more I think about the delivery of this module, the more I am leaning closer to a blended approach. This thinking is as a result of the learner analysis that I conducted. I am doubtful that the target learners will be able to accomplish the module independently given the limitations that arose in the research.   However, I am confident that they can rise to the occasion given the intensity of their education.

This class has allowed me to practice a bit of the project management skills that I learned in the spring semester. In particular the planning phase. I am looking at this project from the project management perspective. Our professor's message about focusing on the design document directly, at this phase, such that someone else will be creating the module has eased the pressure that I was placing on myself.

The challenge in this section was identifying the (CN) and (B) in the terminal objectives. With the help of the class instructor, I was able to make the distinction and edit the items to meet the requirements of the Dick and Carey (2015) Dick and Carey Model.

My peers have been very helpful in critiquing my materials and providing useful insight into critical elements of the design. It was suggested that I place a total passing total for the assessment. I chose to implement this consideration in the assessment. One-hundred percent of the steps have to be performed perfectly to meet the learning objective.

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[Design Evaluation Chart](#)

Main Instructional Goal	Terminal Objective	Test Item
Students will be able to Mail Merge letters to be sent to tenants.		Learners will be provided with Appendix B; a handout that covers the mail merge process and access to a video that demonstrates the process.
Performance Skill	Performance Objectives	Parallel Test Items
1. Start Microsoft Word with a Blank Document	Given a computer with Microsoft Word **(CN)**, learners will successfully **(CR)** start Microsoft Word by clicking on the start menu and clicking on the MS Word icon and start a blank document. **(B)**	The instructor will formally assess the learners by observing them start Microsoft Word and then select "Blank Document." The instructor will use Appendix B as a checklist.
1.1 Start Microsoft Word	1.1.1 Given a computer with Microsoft Word **(CN)**, learners will successfully **(CR)** start Microsoft Word by clicking on the Dock and then clicking on the MS Word icon. **(B)**	The instructor will formally assess the learners by observing them click "Microsoft Word" from the Dock. The instructor will use Appendix B as a checklist.
1.2 Select Blank Document	1.2.1 With Microsoft Word started **(CN)**, learners will successfully (**CR**) begin a new document by clicking on "Blank Document." **(B)**	The instructor will formally assess the learners by observing the learners click "Blank Document." The instructor will use Appendix B as a checklist.
Performance Skill	Performance Objectives	Parallel Test Items
2. Start mail merge and select document type	Given a computer with Microsoft Word **(CN)**, learners will successfully **(CR)** begin the mail merge process by clicking on the "Mailings" tab, selecting "Start Mail Merge" then, "Letters." **(B)**	The instructor will formally assess the learners by observing them click "Start Mail Merge" and then click "Letters." The instructor will use Appendix B as a checklist.
2.1 Click on "Mailings" tab	2.1.1 With a blank document on the monitor **(CN)**, learners will successfully **(CR)** initiate the mail merge process by clicking on the "Mailings" tab. **(B)**	The instructor will formally assess the learners by observing them click the "Mailings" tab to display the mail merge ribbon. The instructor will use Appendix B as a checklist.
2.2 Click on "Start Mail Merge"	2.2.1 In the "Mailings" tab **(CN)**, learners will successfully (**CR**) initiate the mail merge process	The instructor will formally assess the learners by observing them click "Start

	by clicking on the "Start Mail Merge." **(B)**	Mail Merge" to put Microsoft Word in mail merge mode. The instructor will use Appendix B as a checklist.
2.3 Select "Letters" document type	2.3.1 Within the "Start Mail Merge" command **(CN)**, learners will successfully **(CR)** choose "Letters" as the Main Document type by clicking on "Letters" in the "Start Mail Merge" drop-down menu. **(B)**	The instructor will formally assess the learners by observing them click "Letters." The instructor will use Appendix B as a checklist.
Performance Skill	Performance Objectives	Parallel Test Items
3. Create Data Source	3 With a blank document on the monitor **(CN)**, learners will successfully (**CR**) create the data source and, with no errors, type data for five people in a contact list**.(B)**	The instructor will formally assess the learners by observing them click "Select Recipients" then "Create a New List" to begin the process of developing the recipient list. The instructor will use Appendix B as a checklist.
3.1 Click on "Select Recipients"	3.1.1 With a blank document on the monitor **(CN),** learners will successfully **(CR)** began developing the data source by clicking on the "Select Recipients" button."**(B)**	The instructor will formally assess the learners by observing them click "Select Recipients" to begin the process of developing the recipient list. The instructor will use Appendix B as a checklist.
3.2 Click on "Create a New List"	3.2.1 Within the "Select Recipients" command **(CN)**, learners will successfully **(CR)** initiate developing a new data source by clicking on the "Create a New List" button."**(B)**	The instructor will formally assess the learners by observing them click "Create a New List" to develop a new recipient. The instructor will use Appendix B as a checklist.
3.3 Choose field names	3.3.1 Within the "Edit Fields List" dialogue box **(CN)**, learners will successfully **(CR)** choose the correct field names for the new data source by selecting them from the list provided in the "Edit Fields List" dialogue	The instructor will formally assess the learners by observing them remove the field names that are not going to be used in the contact list. The instructor will use Appendix B as a checklist.

	box."**(B)**	
3.4 Save Data Source Fields	3.4.1 Promptly after choosing the first merge field **(CN)**, the learner will successfully **(CR)** save the data source by placing in "Documents" with the name "Data Source One" **(B)**	The instructor will formally assess the learners by observing save the field list on the desktop. The instructor will use Appendix B as a checklist.
3.5 Input Records	3.5.1 With the "Edit List Entries" dialogue box **(CN)**, learners will successfully **(CR)** register five contacts by typing their respective data in the "Edit List Entries" dialogue box.**(B)**	The instructor will formally assess the learners by observing them input the three records into the "Edit List Entries" dialogue box. The instructor will use Appendix B as a checklist.
Performance Skill	Performance Objectives	Parallel Test Items
4. Create Main Document	With a blank document on the monitor **(CN)**, learners will successfully (**CR**) generate a create a main document by typing a full block business letter with no spelling or grammatical errors. **(B)**	The instructor will formally assess the learners by observing them type the main document. The instructor will use Appendix B as a checklist.
4.1. Type Main Document	4.1.1 With a blank document on the monitor **(CN)**, learners will successfully **(CR)** generate a create a main document by typing a full block business letter with no spelling or grammatical errors. **(B)**	The instructor will formally assess the learners by observing them type the main document. The instructor will use Appendix B as a checklist.
Performance Skill	Performance Objectives	Parallel Test Items
5. Insert Merge Fields into Main Document	With a blank document on the monitor **(CN)**, learners will successfully (**CR**) insert merge fields into the main document by placing the merge field in the correct location in the main document. **(B)**	The instructor will formally assess the learners by observing them place the merge fields in the correct location in the main document using the "Insert Merge Field" command. The instructor will use Appendix B as a checklist.
5.1 Click on location in main document	5.1.1 With a complete letter **(CN)**, learners will successfully **(CR)** initiate the process of inserting the merge fields into the main document	The instructor will formally assess the learners by observing them place the insertion point in the location in the main document. The

	by clicking in the recipient's address section of the main document. (**B**)	instructor will use Appendix B as a checklist.
5.2 Click on "Insert Merge Field"	With the mouse activated at the recipient's address (**CN**), learners will successfully (**CR**) display the list of fields by clicking on the "Insert Merge Field" button. (**B**)	The instructor will formally assess the learners by observing them click "Insert Merge Field" to display the list of fields selected in step 3.3. The instructor will use Appendix B as a checklist.
5.3 Click on appropriate merge field to place it in the main document.	Within the "Insert Merge Field" dialogue box (**CN**), learners will successfully (**CR**) place the correct merge field into the main document by clicking on it. (**B**)	The instructor will formally assess the learners by observing them click on the appropriate field, placing it in the recipient's name and address section of the main document. The instructor will use Appendix B as a checklist.
Performance Skill	Performance Objectives	Parallel Test Items
6. Preview Results	Given a complete main document (**CN**), learners will successfully (**CR**) preview the results of the merge by clicking the "Preview Results" button and navigating through the letters. (**B**)	The instructor will formally assess the learners by observing them click on the "Preview Results" command and navigating one record at a time until all merged letters have been previewed. The instructor will use Appendix B as a checklist.
6.1. Preview Results	Given a complete main document (**CN**), learners will successfully (**CR**) preview the results of the merge by clicking the "Preview Results" button and navigating through the letters. (**B**)	The instructor will formally assess the learners by observing them click on the "Preview Results" button to convert the inserted merge fields into specific records. The instructor will use Appendix B as a checklist.
Performance Skill	Performance Objectives	Parallel Test Items
7. Check for Errors	While previewing the letters (**CN**), learners will successfully (**CR**) check for errors in the main document and data source by reading the main document in the preview process and each contact information as the learner navigates forward using the	The instructor will formally assess the learners by observing them read the main document and the previewed recipient names and addresses and noting any errors they observe. The instructor will use Appendix B as a checklist.

	"Next Record" button. **(B)**	
7.1 Check for errors in main document	While previewing the letters **(CN)**, learners will successfully check for errors in main document by reading the main document in the preview process. **(CR)** If errors are found in the main document, the learner will proceed to step 7.3. If no errors are found in the main document, the learner will proceed to step 7.4 **(B)**	The instructor will formally assess the learners by observing them read the main document, taking notes of any errors. The instructor will use Appendix B as a checklist.
7.2 If yes, edit main document	Given a complete main document **(CN)**, learners will successfully **(CR)** correct all errors the main document and data source inputting the changes in the current screen. **(B)**	The instructor will formally assess the learners by observing them edit the main document for all errors sited. The instructor will use Appendix B as a checklist.
7.3 Check for errors in Recipient list errors	Given a complete main document **(CN)**, learners will successfully **(CR)** check for errors in the data source. by reading the information for each contact to ensure that names are spelled properly, and addresses are correctly inputted for each contact, as the information is previewed. If errors are found in the data source, the learner will proceed to step 7.4. If no errors are found in the main document, the learner will proceed to step 8. **(B)**	The instructor will formally assess the learners by observing them navigate through the preview. Reading the names and addresses of the contact list, taking notes of any errors they may observe. The instructor will use Appendix B as a checklist.
7.4 if yes, edit recipient list	Given a complete data source **(CN)**, learners will successfully **(CR)** correct all errors the data source inputting the changes in the "Edit List Entries" dialogue box. **(B)**	The instructor will formally assess the learners by observing them edit the data source for all errors sited. The instructor will use Appendix B as a checklist.
Performance Skill	Performance Objectives	Parallel Test Items

COMPLETE LEARNING MODULE: MAIL MERGE IN MICROSOFT WORD

8. Finish and Merge	Given a complete main document **(CN)**, learners will successfully (**CR**) complete the mail merge process by clicking on the "Finish and Merge" button. (**B**)	The instructor will formally assess the learners by observing them click on the "Finish and Merge" command and scroll down to view all merged letters. The instructor will use Appendix B as a checklist.
8.1 Click on "Finish and Merge" button	In the Mailings ribbon **(CN)**, learners will successfully **(CR)** complete the mail merge process by clicking on the "Edit Individual Documents" option in the dropdown menu. (**B**)	The instructor will formally assess the learners by observing them click on the "Finish and Merge." The instructor will use Appendix B as a checklist.
8.2 Click on "Edit Individual Documents"	While in the "Finish and Merge" drop-down **(CN)**, learners will successfully **(CR)** complete the mail merge process by clicking on the "Edit Individual Documents" option in the dropdown menu. (**B**)	The instructor will formally assess the learners by observing them click on the "Edit Individual Documents" command to view the merged documents. The instructor will use Appendix B as a checklist.
Performance Skill	Performance Objectives	Parallel Test Items
9. View Merged Documents	With merged documents on the monitor **(CN)**, learners will successfully **(CR)** view the final merged letters. (**B**)	The instructor will formally assess the learners by observing them observe the new window that appears and scrolling down through the documents. The instructor will use Appendix B as a checklist.
9.1 Scroll Down	With merged documents on the monitor **(CN)**, learners will successfully **(CR)** view the final merged letters by scrolling down the screen. (**B**)	The instructor will formally assess the learners by observing them scroll down, viewing each merged letter. The instructor will use Appendix B as a checklist.
Performance Skill	Performance Objectives	Parallel Test Items
10. Close and Save	With merged documents on the monitor **(CN)**, learners will successfully **(CR)** close all windows and save the main document and, If necessary the data source.(**B**)	The instructor will formally assess the learners by observing them close the merged letters and save them onto the desktop. The instructor will use Appendix B as a checklist.

COMPLETE LEARNING MODULE: MAIL MERGE IN MICROSOFT WORD

10.1 Close Merged Letters	With merged documents on the monitor **(CN)**, learners will successfully **(CR)** close the merged letters and save them. **(B)**	The instructor will formally assess the learners by observing them, in the merged letters, click on "File → Close," and save the document when prompted, onto the desktop. The instructor will use Appendix B as a checklist.
10.2 Close and Save Main Document	With the main document on the monitor **(CN)**, learners will successfully **(CR)** close the main document and save it. **(B)**	The instructor will formally assess the learners by observing them, in the main document, click on "File → Close," and save the document when prompted, onto the desktop. The instructor will use Appendix B as a checklist.
10.3 Save Data Source Records	With the main document closed **(CN)**, learners will successfully **(CR)** save the Data Source, if prompted. **(B)**	The instructor will formally assess the learners by observing them save the data source when prompted. The instructor will use Appendix B as a checklist.

COMPLETE LEARNING MODULE: MAIL MERGE IN MICROSOFT WORD

Instructional Strategy Alignment Implementation Plan

Learning Component	Design Plan
Cluster 1 **Setting up Microsoft Word for Mail Merge**	**Objectives** 1. Start Microsoft Word with a Blank Document 1.1 Start Microsoft Word 1.2 Select "Blank Document" **Content Presentation** - Upon the commencement of the course, students will be provided with a computer and Microsoft Word and a copy of the handouts in Appendix A & B, and the link to the online video. - The instructor will demonstrate how to start Microsoft Word from the Dock and select "Blank Document". - Example – The student may use the handout. The instructor may also use the PowerPoint slides (Appendix C) **Student Groupings / Media Usage** - Students will work individually - Appendix A and B will be used to guide the workshop. **Student Participation** - Appendix B - With eyes on the projection, learners will watch the demonstration and them complete the steps. **Student Grouping and Media Selection** - Students will work individually
Cluster 2 **Start mail merge and select document type**	**Objectives** 2. Start mail merge and select document type 2.1 Click on "Mailings" tab 2.2 Click on "Start Mail Merge" 2.3 Select "Letters" **Content Presentation**

	• Instructor will demonstrate how to place Microsoft Word into mail merge mode and select the "Letters" document type. • Example – The students may use the handout. The instructor may also use the PowerPoint slides (Appendix C) **Student Groupings / Media Usage** • Students will work individually • Appendix A and B will be used to guide the workshop. **Student Participation** • Appendix B • With eyes on the projection, learners will watch the demonstration and them complete the steps. **Student Grouping and Media Selection** • Students will work individually
Cluster 3 **Create the Data Source / Save Data Fields / Input Records**	**Objectives:** 3. Create Data Source 3.1 Click on "Select Recipients" 3.2 Click on "Create a New List" 3.3 Choose field names 3.4 Save the Data Fields 3.5 Input Records **Content Presentation** • Instructor will demonstrate all the steps to create the data source. • Example – The student may use the handout. The instructor may also use the PowerPoint slides (Appendix C) **Student Groupings / Media Usage** • Students will work individually • Appendix A and B will be used to guide the workshop. **Student Participation** • Appendix B

	• With eyes on the projection, learners will watch the demonstration and them complete the steps. **Student Grouping and Media Selection** • Students will work individually
Cluster 4 Title /Focus of the Cluster Type the Main Document	**Objectives** 4. Create Main Document 4.1 Type the Main Document **Content Presentation** • Instructor will demonstrate the correct method of typing the main document. • Example – The student may use the handout. The instructor may also use the PowerPoint slides (Appendix C) **Student Groupings / Media Usage** • Students will work individually • Appendix A and B will be used to guide the workshop. **Student Participation** • Appendix B • With eyes on the projection, learners will watch the demonstration and them complete the steps. **Student Grouping and Media Selection** • Students will work individually
Cluster 5 Title /Focus of the Cluster Insert Merge Fields	**Objectives** 5. Insert Merge Fields into Main Document 5.1 Click on location in main document 5.2 Click on "Insert Merge Field" 5.3 Click on appropriate merge field to place it in the main document. **Content Presentation** • The instructor will demonstrate the process of inserting merge fields into the recipients address section of the main document.

	• Example – The student may use the handout. The instructor may also use the PowerPoint slides (Appendix C) **Student Groupings / Media Usage** • Students will work individually • Appendix A and B will be used to guide the workshop. **Student Participation** • Appendix B • With eyes on the projection, learners will watch the demonstration and them complete the steps. **Student Grouping and Media Selection** • Students will work individually
Cluster 6 Title /Focus of the Cluster Preview Merge and Check for Errors	**Objectives** 6. Preview Results 6.1 Click on "Preview Results" command 7 Check for Errors 7.1 Check for errors in main document 7.2 If yes, edit main document 7.3 Check for errors in names and addresses 7.4 if yes, edit recipient list **Content Presentation** • The instructor will demonstrate how to preview the merged documents while checking for errors in the main document text and the data source. • Example – The student may use the handout. The instructor may also use the PowerPoint slides (Appendix C) **Student Groupings / Media Usage** • Students will work individually • Appendix A and B will be used to guide the workshop. **Student Participation** • Appendix B

COMPLETE LEARNING MODULE: MAIL MERGE IN MICROSOFT WORD

	• With eyes on the projection, learners will watch the demonstration and them complete the steps. **Student Grouping and Media Selection** • Students will work individually
Cluster 7 Title /Focus of the Cluster Finish and Merge, and view Merged Documents	**Objectives** **8.** Finish and Merge 8.1 Click on "Finish and Merge" button 8.2 Click on "Edit Individual Documents" 9. View Merged Documents 9.1 Scroll Down **Content Presentation** • Instructor will demonstrate how to finish and merge and view the merged documents on separate pages. • Example – The student may use the handout. The instructor may also use the PowerPoint slides (Appendix C) **Student Groupings / Media Usage** • Students will work individually • Appendix A and B will be used to guide the workshop. **Student Participation** • Appendix B • With eyes on the projection, learners will watch the demonstration and them complete the steps. **Student Grouping and Media Selection** • Students will work individually
Cluster 8 Close and Save	**Objectives:** 10 Close and Save 10.1 Close and Save Merged Letters 10.2 Close and Save Main Document 10.3 Save Data Source Records **Content Presentation**

COMPLETE LEARNING MODULE: MAIL MERGE IN MICROSOFT WORD

	• The instructor will demonstrate how to close and save the merged letters, main document, and data source records.
	• The instructor will demonstrate how to start Microsoft Word from the Dock and select "Blank Document".
	• Example – The student may use the handout. The instructor may also use the PowerPoint slides (Appendix C)
	Student Groupings / Media Usage • Students will work individually • Appendix A and B will be used to guide the workshop.
	Student Participation • Appendix B
	• With eyes on the projection, learners will watch the demonstration and them complete the steps.
	Student Grouping and Media Selection • Students will work individually

Implementation Plan

- This lesson will be conducted as a workshop using a laptop and a projector in a space.
- The module will be piloted with individuals whose reading level is on par with the target population.
- Each participant will work alone, but assistance will be provided if required.
- Testers will be given a total of 60 minutes to complete the module.
- Learners will be provided all the handouts and technology tools needed.
- Implementation of this module will be considered successful if the testers are able to complete the module with minimum assistance from the IDer / developer.
- If the testers are able to complete 90% of the module with minimum assistance, it will be considered that they have succeeded in learning the material.

COMPLETE LEARNING MODULE: MAIL MERGE IN MICROSOFT WORD

Evaluation Plan

To evaluate this module an interview will be conducted with the pilot testers.

The evaluation for this project will be conducted in-person and through an LMS

Student will be provided with a main document and contact list on paper that they will digitize using

mail merge to produce letters for each person on the list.

Sample LMS Questions:
What are the three files in the mail merge process?
What command begins the mail merge procedure?
Which tab displays the mail merge ribbon?
How do you complete the mail merge process?

IDer Reflection

I think this project is going well. This was the most challenging part of the project. In particular,

the Designer Evaluation Chart and the Instructional Strategy Alignment Implementation Plan. My

thinking had to become very granular to get through this process. To complete DD3, I had to visualize

the classroom and all the activities in my mind.   I found myself going back and forth to DD2 to ensure

that the items were congruent.

The good part about it is that missing a step in the process was difficult due to the revisions that

I have done. My peers provided me with great ideas. I am working on facilitator's guide as a result of

seeing what one of my group members developed and my thinking to develop the module as a blended

learning experience as I had mentioned previously. I found it very helpful in case I want to pass this

lesson on to another instructor who may not be as well versed in the mail merge process as I am.

COMPLETE LEARNING MODULE: MAIL MERGE IN MICROSOFT WORD

Complete Learning Module
http://www.proprofs.com/training/course/?title=untitled-course_61265_184420

Implementation & Formative Evaluation Report

Learners were provided with an overview of the mail merge process. Subsequently, they were given the

handouts (see Appendix A and Appendix B). The learners were then asked to watch the video in the

complete learning module, prior to completing the exercise. After the formative evaluation process, a

discussion was held with the participants based on the questions in the table below.

Clarity of Instruction	
Were the instructions easy or difficult to follow?	
Which words in the instructions did you have difficulty understanding?	
What was hard for you to do?	
What did you see that helped you understand what you were doing?	
Attitudinal	
Why was this lesson relevant to you?	
Could you do it by yourself?	
If, no, what help would you need?	

Raw Data

Clarity of Instruction		
	15-year-old	**13-year-old**
Were the instructions easy or difficult to follow?	"Easy"	"very"
Which words in the instructions did you have difficulty understanding?	Merge	"not really"
What was hard for you to do?		Saving the documents
What did you see that helped you understand what you were doing?	Screenshots	The step-by-step paper

COMPLETE LEARNING MODULE: MAIL MERGE IN MICROSOFT WORD

Attitudinal		
Why was this lesson relevant to you?	Can use it to send letters to friends	Not relevant
Could you do it by yourself>	Not yet	Yes
If, no, what help would you need?	The paper with all the steps	Placing the merge fields

Though mail merge is a business process used heavily in the workforce and considered a high-level task, this design illustrates that it is a process that, when properly designed, can be completed by youth ages 13 – 15 years old. I think this has a lot to do with the generational exposure to computer technology and their lack of fear of learning something new using said technology.

The information obtained from the formative evaluation indicated that the step-by-step handout is a very useful document for learners who are new to learning how to mail merge.

Based on this data, the only changes that I foresee making will be to increase the size of the screenshots as they are a viable tool for mastering the mail merge process. The formative evaluation indicated that the module is written at a grade level that both a seventh grade and tenth grade learner can understand and perform the process.

IDer Reflection

This part of the design process was fun. I used a combination of screen recording software and an audio enhancement application to develop the learning module. For the former, I used ActivePresenter7. For the latter, Adobe Premiere Pro was used. This aspect of the development process went well. Where I faced challenges was in developing the facilitator's guide. Prior to this, I have never really designed a guide for teachers. I had to research and review various guides prior to completing the one for this project.

As a designer I have grown substantially. I am aware of where developing design documents fits in the realm of a learner centered approach to developing instruction. The use of a step-by-step procedure was not new to me, as in my career as a software instructor requires such understanding. However, I took on the task of designing what is considered one of the most productive features of Microsoft Word. The formative assessment made me feel good about the production. My next challenge is to tackle a topic in which I am not a SME. I look forward to that task in the future.
Complete a personal reflection upon the following prompts:
- What went well in the development of this module?

COMPLETE LEARNING MODULE: MAIL MERGE IN MICROSOFT WORD

- What challenges did you face in this project?
- *How have you grown as an instructional designer? What are the biggest 'take aways' from this experience for you?*

COMPLETE LEARNING MODULE: MAIL MERGE IN MICROSOFT WORD

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Appendix A:

Mail Merge Main Steps

The Main Document

The Data Source

The Merged Documents

1. Click on "Mailings" tab

2. Select "Start Mail Merge" then "Letters"

3. Select "Select Recipients List" then "Create a New List"

4. Type the Main Document

5. Insert Merge Fields

6. Preview Merge

7. Select "Finish and Merge" then "Edit Individual Documents"

Hector Zapata, EDCI 572

COMPLETE LEARNING MODULE: MAIL MERGE IN MICROSOFT WORD

Appendix B:
Mail Merge

Applies to: Microsoft Word for Mac
Topic: Setting up Microsoft Word for Mail Merge
Objective: Start Word with a Blank Document

To complete this task:

1) Click on the "Mailings" tab to display the mail merge ribbon
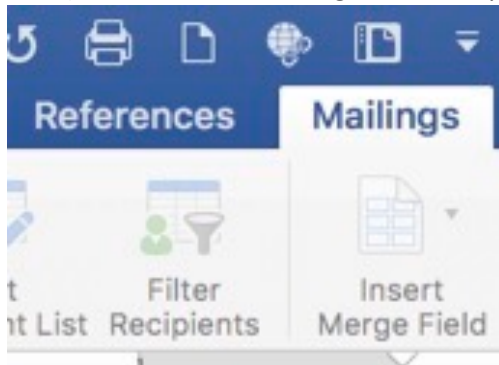
2) From the mail merge ribbon, click on "Start Mail Merge" → "Letters"
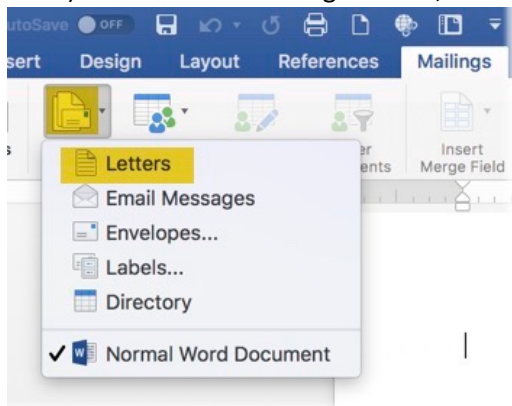
COMPLETE LEARNING MODULE: MAIL MERGE IN MICROSOFT WORD

Applies to: Microsoft Word for Mac
Topic: Data Source
Objective: Choose and Save the Data Source Fields

To complete this task:

1) Click on "Select Recipients," → "Create a New List"
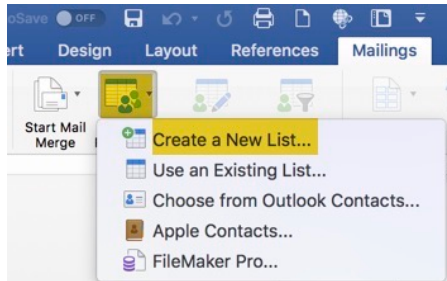
2) The "Edit Recipient List" dialogue box appears
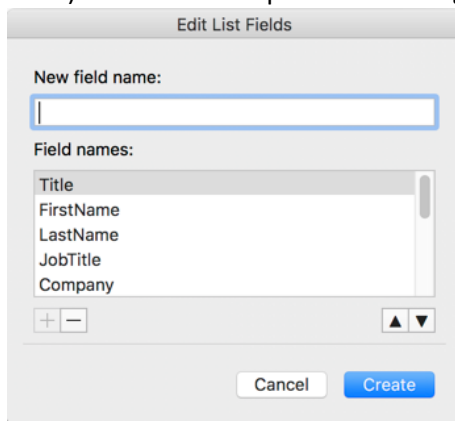
Instructions to remove unwanted fields:
1. Click on the field name
2. Press the MINUS sign "-" to enter a new record
3. Repeat the same process for all records
4. Click "CREATE" after only the field names wanted, remain on the list.

Remove the following fields:
- HomePhone
- WorkPhone
- Country
- Company
- JobTitle

3) Save the fields in the desktop with the name "Congratulations Letter – DS"
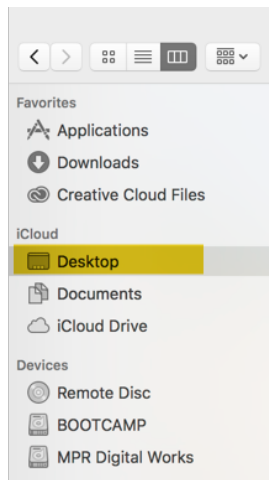
COMPLETE LEARNING MODULE: MAIL MERGE IN MICROSOFT WORD

Mail Merge

Applies to: Microsoft Word for Mac
Topic: Data Source
Objective: Type the data source

To complete this task:

Instructions:
1. Type each item in the correct field
2. Press the tab button on the keyboard or click in the next field to continue
3. Press the PLUS sign "+" to enter a new record
4. Repeat steps 1-3 for all records
5. Click "OK" after all three records have been inputted

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In the next step you develop the main document

COMPLETE LEARNING MODULE: MAIL MERGE IN MICROSOFT WORD

Mail Merge

Applies to: Microsoft Word for Mac
Topic: Main Document
Objective: Type the Main Document

To complete this task:

1) From the Home tab click on the paragraph marker button ¶
2) Press the "Return / Enter" button on the keyboard six times.
3) Type the letter below.

========================

Congratulations,

On behalf of everyone here at Deerwood Resorts Ltd.; I would like to sincerely congratulate you on your recent graduation from Purdue University with your MSEd.

Thank you,

Your Name

========================

COMPLETE LEARNING MODULE: MAIL MERGE IN MICROSOFT WORD

Mail Merge

Applies to: Microsoft Word for Mac
Topic: Main Document
Objective: Insert Merge Fields

To complete this task:
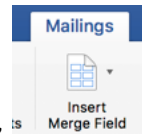
In the main document, use the "Insert Merge Field Button,   to insert the fields as you see them below.

========================
«Title» «FirstName»
«Address1»
«City», «State» «PostalCode»

Congratulations,
======================

Mail Merge

Applies to: Microsoft Word for Mac
Topic: Main Document
Objective: Preview Results

To complete this task:

1. Click on the "Preview Results" button
2. The merge fields will change to reveal record 1
3. Click the "Next" button to display the next record
4. Repeat step 4 to view one record at a time
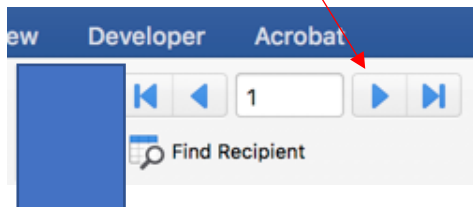
COMPLETE LEARNING MODULE: MAIL MERGE IN MICROSOFT WORD

Mail Merge

Applies to: Microsoft Word for Mac
Topic: Merged Letter
Objective: Preview Results, Save merged letters

To complete this task:

1) Click on the "Finish & Merge" button
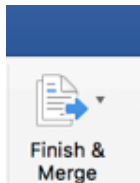
2) Select "Edit Individual Documents"
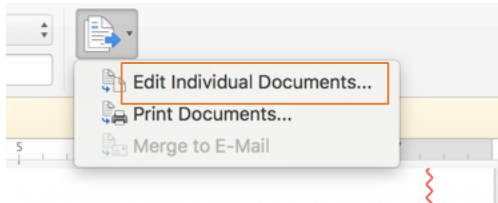
3) A new document will appear on the screen
4) Scroll down to see the rest of the letters
5) Save the merged letters on the desktop with the name ' Congratulations merge"
6) The screen will now display the main document,

COMPLETE LEARNING MODULE: MAIL MERGE IN MICROSOFT WORD

Mail Merge

Applies to: Microsoft Word for Mac
Topic: Main Document
Objective: Close and Save Main Document / Save Data Source

To complete this task:

1) Click on File Close
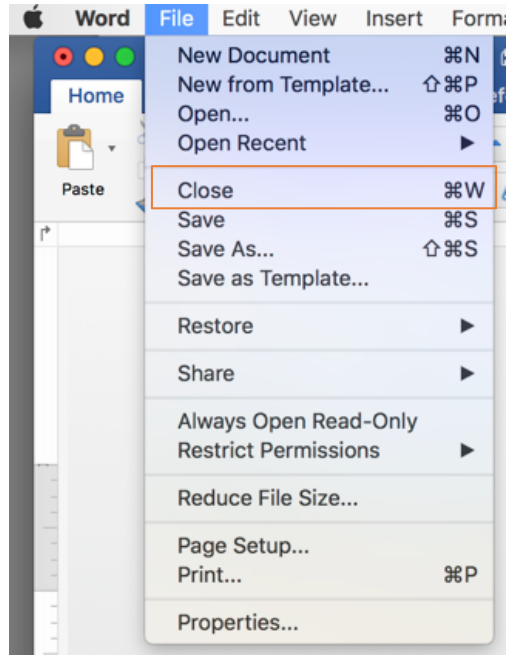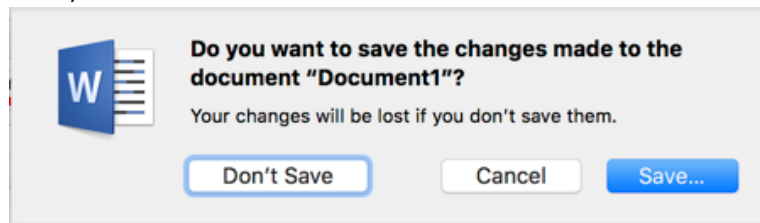
2) Select "Save"

3) You will be asked to save the Data Source
4) Select "Save"
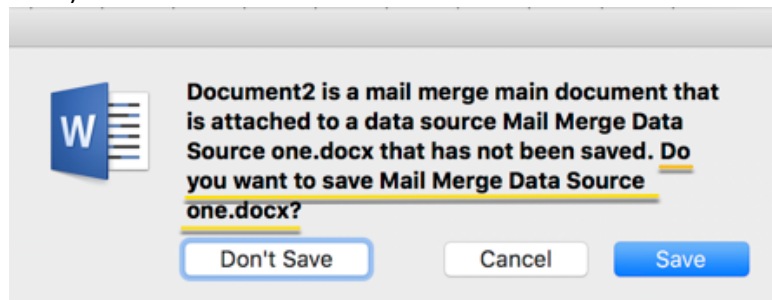
CONGRATULATIONS!!!

COMPLETE LEARNING MODULE: MAIL MERGE IN MICROSOFT WORD

Workshop Agenda

The length for this workshop is 60 minutes (1 hour).
This workshop will utilize elements of Dr. Merrill's First Principle of Instruction.

Item #	Time	Topic
1	5 minutes	Introduction / Pass out Handout
2	15 minutes	Demonstration
3	30 minutes	Engagement
4	10 minutes	Post-test
5	2 minutes	Q&A

Facilitator's Guide

<u>Mail Merge Facilitator's Guide</u>

A guide to Mail Merge using Microsoft Word for Mac 2018

Created by Hector Zapata

This guide facilitates a step-by-step process of the mail merge procedure using Microsoft Word for Mac 2018. It can also be adapted for Microsoft Word for Windows.

COMPLETE LEARNING MODULE: MAIL MERGE IN MICROSOFT WORD

Tools Required

- Microsoft Office for Mac 2018
- Mac computer
- Mouse
- Keyboard
- Internet Access

Link to online Module:

http://www.proprofs.com/training/course/?title=untitled-course_61265_184420

What is Mail Merge

Mail Merge is a feature built-into Microsoft Word. The feature is to allow any person to merge a set of data and a document to generate multiple letters for printing and ultimately postal mailing. A mail merge task connects a contact list known as the data source to another document, for example a letter, known as the main document. There are three files in the mail merge process.

1. The Data Source
2. The Main Document
3. The merged letters
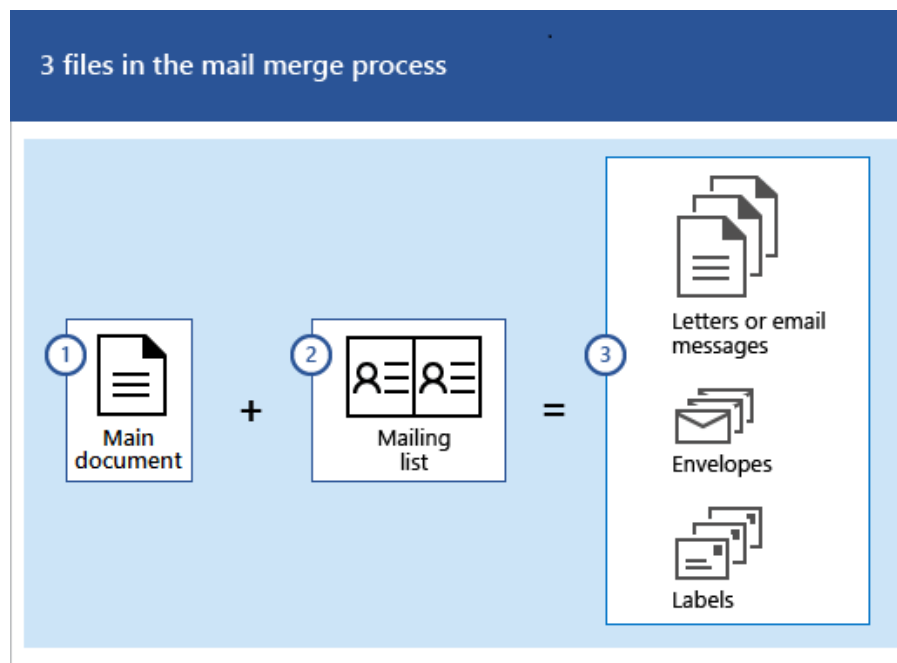
COMPLETE LEARNING MODULE: MAIL MERGE IN MICROSOFT WORD

To perform a mail merge, start the application and begin with a blank document

Starting Microsoft Word and choosing Blank Document

From the desktop screen or Dock start Microsoft Word
Click on **Blank Document** to create a new document.
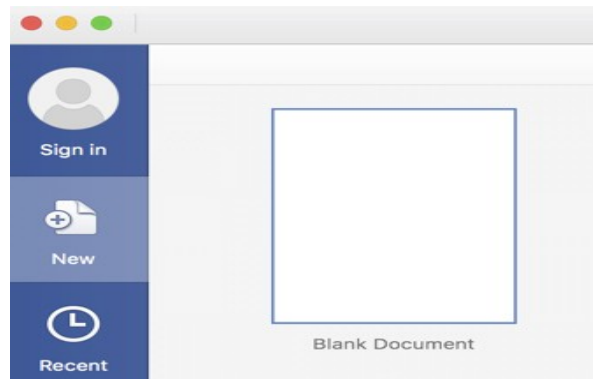
To perform a mail merge, start the application and begin with a blank document

Start Mail Merge and Select Document Type

From the tabs click on **Mailing > Start Mail Merge >Letter**.
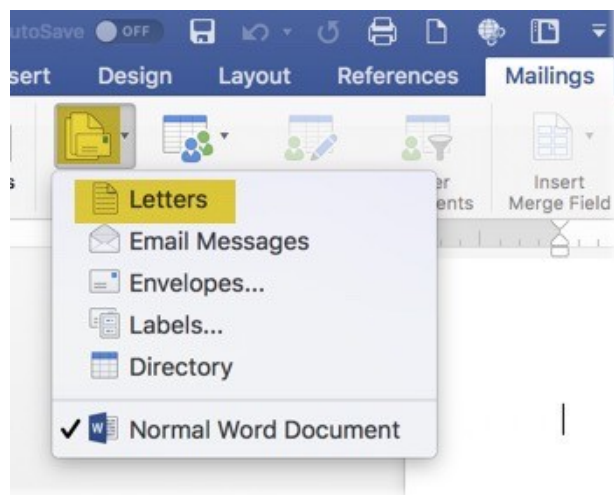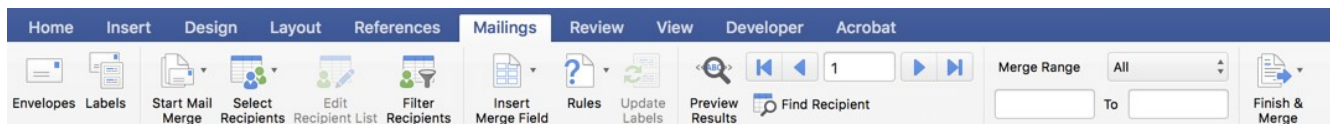
The facilitator should point out to students that Microsoft Word is now setup for the mail merge process.

Create Data Source

Choose the Field List

The data source is the list of names and addresses that will be used in the mail merge. To create the data source, choose the fields that will be filled with specific information. The Data Source must be saved.
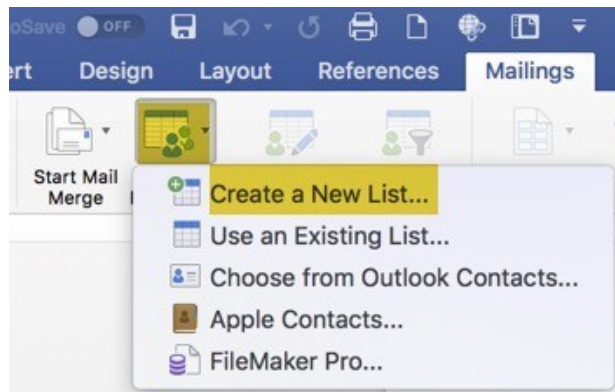
The next dialogue box "Edit List Fields" will allow the learners to choose the fields that are going to be used. Pass out the handout at this point and point out the header row in the document. Point out to the student that this is information taken from business cards and categorized into fields.
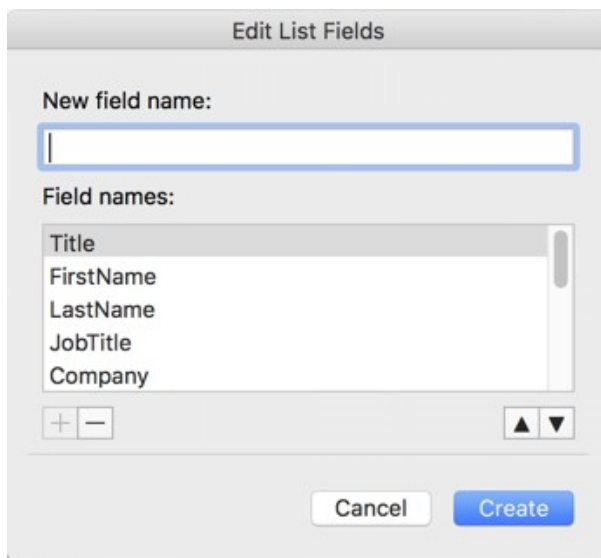
Instructions to remove unwanted fields:
1. Click on the field name
2. Press the MINUS sign "-" to enter a new record
3. Repeat the same process for all records
4. Click "CREATE" after only the field names wanted, remain on the list.

Remove the following fields:
- HomePhone
- WorkPhone
- Country
- Company
- JobTitle

The dialogue box contains field names that are commonly used to address a letter. There are thirteen fields in this dialogue box. To view the fields that are not immediately displayed, use the scroll bar on the right. Not all fields have to be used. To delete a field, click on if, then click on the minus sign "-" in the left corner. Conversely, to add a field,

COMPLETE LEARNING MODULE: MAIL MERGE IN MICROSOFT WORD

click on the plus sign "+".   When the student clicks on the create button, the program
will automatically prompt to save the list of fields chosen above.

Save the fields in the desktop with the name "Congratulations Letter – DS"
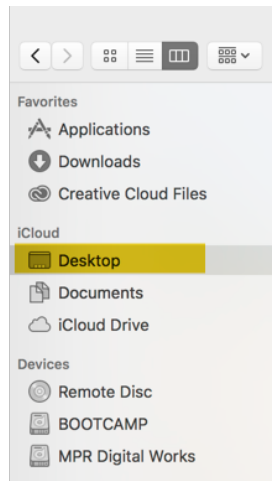
Instructions:
Students should save the data source on the
desktop

Type the Data Source Records

Instructions:
1. Type each item in the correct field
2. Press the tab button on the keyboard or click in
    the next field to continue
3. Press the PLUS sign "+" to enter a new record
4. Repeat steps 1-3 for all records
5. Click "OK" after all three records have been
    inputted

Ms. Karen Lambton	Belinda Asher	Mr. Robert Villas
2005 40th Street	620 Mayview Ave.	110 Riverbend Drive
North Bergen, NJ 07054	Pineville, WV 24874	Suite 1150
		Stamford, CT 06907

Very Important point to be made: Do not type an extra space after the last character typed in
an entry. This is especially important when inputting items such as titles and first names. Point
out that the space will be placed in a later step when the merge fields are inserted into the
main document.

COMPLETE LEARNING MODULE: MAIL MERGE IN MICROSOFT WORD

Create Main Document

At this point the student is ready to develop the main document. This includes typing the document and inserting merge fields in the correct location in the letter.

The facilitator should encourage the students to activate the show/hide feature from the home tab. Below are the instructions the students should follow when typing the letter.

4) From the Home tab click on the paragraph marker button ¶
5) Press the "Return / Enter" button on the keyboard six times.
6) Type the letter below.

========================

Congratulations,

On behalf of everyone here at Deerwood Resorts Ltd.; I would like to sincerely congratulate you on your recent graduation from Purdue University with your MSEd.

Thank you,
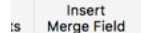
Your Name

========================

Insert Merge Fields

This is the step that bridges the two prior items, the data source and the main document. The facilitator should point out that the merge fields are now acting as placeholders for the specific information that was typed in the "Edit List Entries" dialogue box earlier.
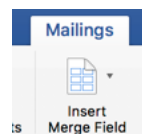
In the main document, use the "Insert Merge Field Button, to insert the fields as you see them below.

========================
«Title» «FirstName»
«Address1»
«City», «State» «PostalCode»

**COMPLETE LEARNING MODULE: MAIL MERGE IN MICROSOFT WORD**

Congratulations,
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# Preview Results / Check for Errors

The learners need to see what the results will look like before the process is complete. This is sort of like taste-testing a meal to know that it's cooked well. This is also the time to check for any errors in the data source records and the main document.

5. **Click on the "Preview Results" button**
6. **The merge fields will change to reveal record 1**
7. **Click the "Next" button to display the next record**
8. Repeat step 4 to view one record at a time
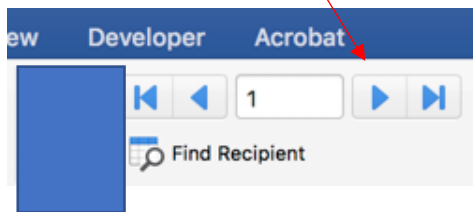
Edit Data Source

While reviewing the data source records, if the student comes across an item that was mistyped, the learners should take note of it. Then, clicking on the "Edit Recipient List" button,
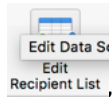
, the application will display the Edit List Entries dialogue box, with the record of the current recipient displayed.
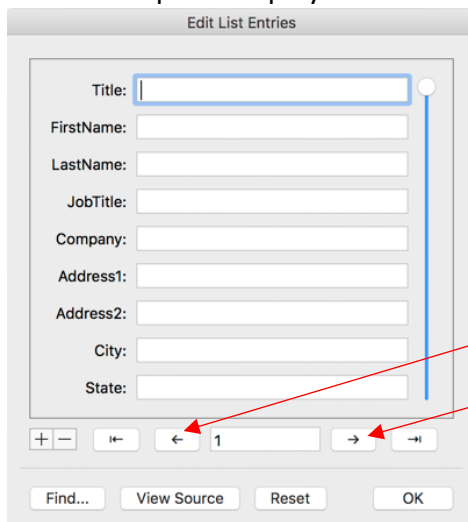
Facilitator should point out the arrow buttons used to navigate back and forward in the dialogue box.

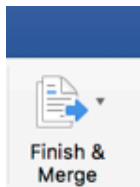**COMPLETE LEARNING MODULE: MAIL MERGE IN MICROSOFT WORD**

Edit Main Document

While reading the main document, the learner should correct all spelling and/or grammatical errors.
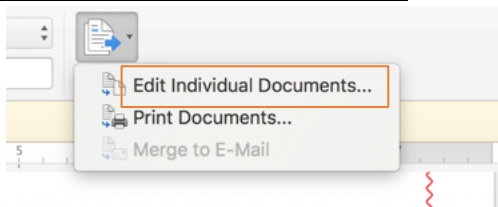
Save Merged Letters

The facilitator at this point should observe and monitor students to ensure that the letters are saved properly.

<u>Click on the "Finish & Merge" button</u>


<u>Select "Edit Individual Documents"</u>

   a) A new document will appear on the screen
   b) Scroll down to see the rest of the letters
   c) Save the merged letters on the desktop with the name ' Congratulations merge"
   d) The screen will now display the main document.

## Close and Save Main Document / Save Data Source

These are the last steps in the process. The work has been done. The facilitator should point out the importance of saving both the main document and the data source. Here is the time to state that the data source can be used for another set of letters that may be sent to the recipients, hence the importance of getting all the record items correctly inputted the first time.

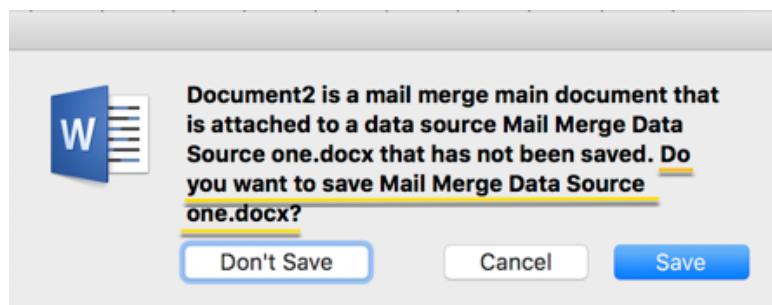**COMPLETE LEARNING MODULE: MAIL MERGE IN MICROSOFT WORD**

1) Click on File Close
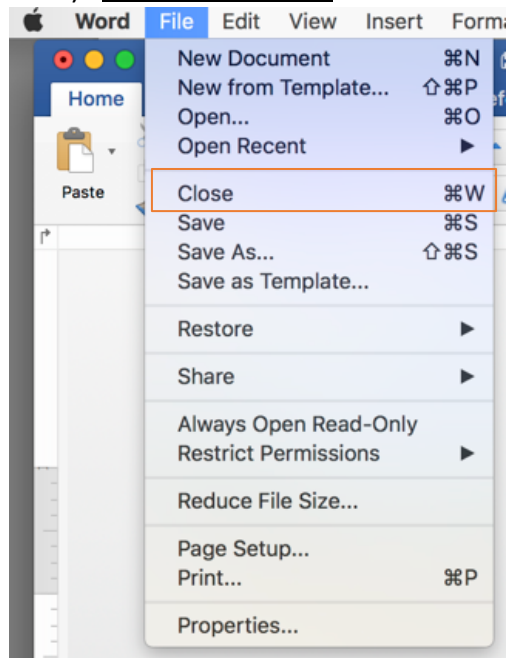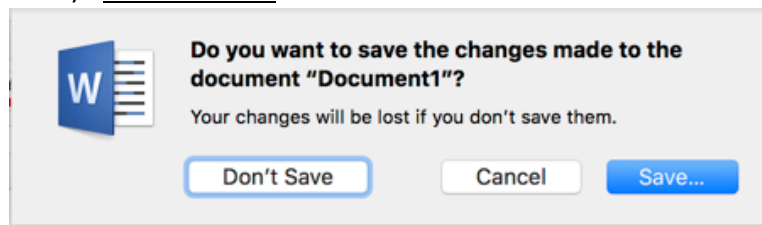
2) Select "Save"

3) When asked to save the Mail Merge Data Source, the facilitator should indicate that they are saving the records that they typed, and they should select "Save" in order to not lose the work.

Congratulate the students on a job well-done