# Instructor’s Manual Exploring Microsoft Word 2019, Chapter 3

## Available Instructor Resources

|  |  |  |
| --- | --- | --- |
| **Resource** | **File Name** | **Found** |
| **Student Data Files** | [Various](#_PROJECTS_AND_EXERCISES), click link to see file list | Online Instructor Resource Center |
| **Solution Files** | [Various](#_PROJECTS_AND_EXERCISES), click link to see file list | Online Instructor Resource Center |
| **Answer Keys** |  | Online Instructor Resource Center |
| Matching | w03\_answerkey\_match.docx |
| Multiple Choice | w03\_answerkey\_mc.docx |  |
| Concepts Checks | w03\_answerkey\_concepts.docx |  |
| **Scorecards** | Various, example:  w03h2StockData\_scorecard.xlsx | Online Instructor Resource Center |
| **Scoring Rubrics** | w03\_rubric.docx | Online Instructor Resource Center |
| **Annotated Solution Files** | Various, example:  w03h2StockData\_annsolution.pdf | Online Instructor Resource Center |
| **Scripted Lecture (Script)** | w03\_script.docx | Online Instructor Resource Center |
| Scripted Lecture Data | w03\_script\_data.xlsx |
| Scripted Lecture Solution | w03\_script\_solution.xlsx |  |
| **PowerPoint Presentation** | w03\_powerpoint\_accessible.pptx | Online Instructor Resource Center |
| **Testbank** | w03\_testbank.docx | Online Instructor Resource Center |
| **Instructor's Manual (lesson plans incl.)** | w03\_instructormanual.docx | Online Instructor Resource Center |
| **Assignment Sheet** | w03\_assignsheet.docx | Online Instructor Resource Center |
| **Prepared Exam (Chapter & App)** |  | Online Instructor Resource Center |
| Prepared Exam-Chap instruction | w03\_exam\_chap\_instruction.docx |
| Prepared Exam-Chap Data | w03\_exam\_chap\_data.xlsx |
| Prepared Exam-Chap Solution | w03\_exam\_chap\_solution.xlsx |
| Prepared Exam-Chap Annotated Sol. | w03\_exam\_chap\_annsolution.pdf |
| Prepared Exam-Chap Scorecard | w03\_exam\_chap\_scorecard.xlsx |
| Prepared Exam-App instruction | w03\_cumexam\_instruction.docx |  |
| Prepared Exam-App Data | w03\_cumexam\_data.xlsx |  |
| Prepared Exam-App Solution | w03\_cumexam\_solution.xlsx |  |
| Prepared Exam-App Annotated Sol. | w03\_cumexam\_annsolution.pdf |  |
| Prepared Exam-App scorecard | w03\_cumexam\_scorecard.xlsx |  |
| **File Guide** | w03\_fileguide.xlsx | Online Instructor Resource Center |
| **Objective Map** | w03\_objectivesmap.xlsx | Online Instructor Resource Center |
| **Grader Project** |  |  |
| Grader Instruction | w03\_grader\_instruction.docx | Online Instructor Resource Center |
| Grader Data | w03\_grader\_data.xlsx |
| Grader Solution | w03\_grader\_solution.xlsx |
| Grader Annotated Solution | w03\_grader\_annsolution.pdf |  |
| Grader Scorecard | w03\_grader\_scorecard.xlsx |  |

## CHAPTER OBJECTIVES

### When students have finished reading this chapter, they will be able to:

* Insert a Table
* Format a Table
* Manage Table Data
* Enhance Table Data
* Create a Mail Merge Document
* Complete a Mail Merge

## CHAPTER OVERVIEW

Students will explore how tables are used to organize and present information as well as how to modify their appearance even after the table has been created. Additionally, students will apply mail merge to create personalized documents.

### The major sections in this chapter are:

1. **Tables.** In this section, students will learn to create or draw a table, modify the appearance of a table, and adjust table position and alignment.
2. **Advanced Table Features.** In this section, students will learn to include borders and shading, formulas and functions, captions, recurring headings, and sort data.
3. **Mail Merge.** In this section, students will learn to create a main document, a data source, and combine the two into a completed, merged document.

## CLASS RUN-DOWN

1. Have students turn in homework assignments.
2. Talk about the chapter using the discussion questions listed below.
3. Use a PowerPoint presentation to help students understand the chapter content.
4. Demonstrate table processes in Word 2019.
5. [Run through the Scripted Lecture for the chapter. Give special attention to areas in which students might be challenged.](#_WHEN_USING_SCRIPTED)
6. Have students complete the Capstone Exercise for Word Chapter 3.
7. Use MyITLab for in-class work or to go over homework.
8. Give students the homework handout for the next class period.

## LEARNING OBJECTIVES

### At the end of this lesson students should be able to:

* Create or Draw a Table
* Insert and Delete Rows and Columns
* Merge and Split Cells
* Change Row Height and Column Width
* Apply and Modify Table Styles
* Adjust Table Position and Alignment
* Format Table Text
* Calculate Using Table Formulas and Functions
* Use a Formula
* Use a Function
* Sort Data in a Table
* Include a Recurring Table Header
* Include Borders and Shading
* Convert Text to a Table and Covert a Table to Text
* Include a Table Caption
* Select or Create a Recipient List
* Use an Excel Worksheet as a Data Source
* Edit a Data Source
* Insert Merge Fields
* Complete a Merge

## KEY TERMS

**Argument–**A positional reference contained within parentheses in a function such as a cell reference or value, required to complete a function and produce output.

**Border–**Lines that display at the top, bottom, left, or right of a paragraph, a page, a table, or an image.

**Border Painter–**A feature that enables you to choose border formatting and click on any table border to apply the formatting.

**Caption–**A descriptive title for a table.

**Cell–**The intersection of a column and row in a Word table, PowerPoint table, or Excel worksheet.

**Data source–**A list of information that is merged with a main document during a mail merge procedure.

**Field–**The smallest data element contained in a table, such as first name, last name, address, and phone number.

**Form letter–**A letter with standard information that you personalize with recipient information, which you might print or email to many people.

**Formula–**A combination of cell references, operators, values, and/ or functions used to perform a calculation.

**Function–**A predefined computation that simplifies creating a complex calculation and produces a result based on inputs known as arguments.

**Header row–**The first row in a data source, that contains labels describing the data in rows beneath.

**Insert control–**An indicator that displays between rows or columns in a table; click the indicator to insert one or more rows or columns.

**Mail Merge–**A process that combines content from a main document and a data source.

**Main document–**A document that contains the information that stays the same for all recipients in a mail merge.

**Merge field–**An item that serves as a placeholder for the variable data that will be inserted into the main document during a mail merge procedure.

**Order of operations–**A set of rules that controls the sequence in which arithmetic operations are performed. Also called the order of precedence.

**Range–**A group of adjacent or contiguous cells in a worksheet. A range can be adjacent cells in a column (such as C5:C10), in a row (such as A6:H6), or a rectangular group of cells (such as G5:H10).

**Record–**A group of related fields representing one entity, such as data for one person, place, event, or concept.

**Shading–**A background color that appears behind text in a paragraph, page, or table element.

**Table–**A grid of columns and rows that organizes data.

**Table alignment–**The horizontal position of a table between the left and right margins.

**Table style–**A named collection of color, font, and border designs that can be applied to a table.

## DISCUSSION QUESTIONS

* Why might you create a table rather than just set tabs to align information?
* How can you tell if a table includes a recurring header?
* When would you use Border Painter instead of Format Painter?
* Are there benefits to creating recipient lists in one program versus another?

## WHEN USING SCRIPTED LECTURE IN CLASS, DEMONSTRATE HOW TO:

* Create a Table and Insert and Delete Rows and Columns
* Merge and Split Cells and Change Row Height and Column Width
* Apply and Modify Table Styles, Adjust Table Position and Alignment, and Format Table Text
* Use a Formula and Use a Function
* Sort Data in a Table and Include a Recurring Table Header
* Include Borders and Shading and a Table Caption
* Convert Text to a Table
* Select a Recipient List
* Edit a Data Source
* Insert Merge Fields
* Complete a Merge

## CONNECTIONS PRACTICAL PROJECTS AND APPLICATIONS

* Create your resume in a table and hide the borders.
* Experiment with using tabs, commas, Enter, and other symbols to separate text.
* Practice converting text to a table and then converting the table back to text.
* Explore using mail merge for personalized emails.
* Create personalized labels or envelopes using mail merge.

## TEACHING NOTES

### Tables

In this section, students will learn to insert and position a table, modify table structure, and apply table styles.

#### Inserting a Table

* You can create a uniformly spaced table or one with varying heights and widths.
* **Teaching Tips**: Demonstrate the various ways to create a table.
* **Teaching Tips:** Point out the options on the Table Tools Design and Layout tabs.
* **Teaching Tips:** Remind students that some of the options to modify table structure are also available from the shortcut menu when right-clicking.

#### Formatting a Table

* Tables are objects and their size, alignment, and placement can be easily modified.
* You can apply many of the character-level and paragraph-level formatting options learned in the previous chapter to text in table cells.
* Table styles are a quick and easy way to enhance the appearance of a table.
* **Teaching Tips:** Point out the Table Styles gallery.
* **Teaching Tips:** Show how to modify a table style.
* **Teaching Tips:** Explain how to make a table style available for use in other documents.

### Advanced Table Features

In this section, students will learn to manage table data and enhance a table’s readability.

#### Managing Table Data

* Word can include formulas and functions in tables. Unlike Excel, Word does not automatically update a formula when cell contents are changed.
* Review the order of operations as it relates to formulas.
* **Teaching Tips:** Explain using cell references when referring to table content.
* **Teaching Tips:** Demonstrate using the Formula dialog box to insert formulas and functions.
* **Teaching Tips:** Show how to sort data in a table by up to three fields.

#### Enhancing Table Data

* Borders and shading enhance a table even if you are using a table style.
* Borders can be applied to all or a portion of a table.
* Custom border choices change to match the document theme.
* **Teaching Tips:** Show how to use the Borders and Shading dialog box.
* **Teaching Tips:** Point out the different delimiters (special characters) that can be used to separate text.
* **Teaching Tips:** Demonstrate adding a caption to a table as well as how to manually update if needed.

### Mail Merge

Mail merge enables you to send a personalized letter, invitation, or email to multiple recipients.

#### Creating a Mail Merge Document

* Mail you receive at home with your name and personal information inserted is a prime example of mail merge.
* **Teaching Tips:** Review the terminology associated with mail merge.
* **Teaching Tips:** Explain the various sources that a recipient list can be obtained from.
* **Teaching Tips:** Demonstrate using the Mail Merge Wizard.
* **Teaching Tips:** Show how to sort and filter a data source.

#### Completing a Mail Merge

* **Teaching Tips:** Stress the importance of matching field names in the data source to those in the main document.
* **Teaching Tips:** Emphasize the need to include spaces and punctuation around the merge fields in the main document.
* **Teaching Tips:** Explain to students that they should go back and edit the main document if they find an error rather than edit each individual document.
* **Teaching Tips:** Tell students that in the real world it is not necessary to save the completed merge as it can be easily recreated from the main document and data source if need be.
* **Teaching Tips:** Demonstrate adding merge fields to a document.
* **Teaching Tips:** Show how you can also use the commands on the Mailings tab to complete a mail merge.

## OBJECTIVE TESTS IN MYITLAB

To find an objective test to help your students practice for tests, have them sign in to MyITLab:   
[www.myitlab.com](http://www.myitlab.com).

## ADDITIONAL WEB RESOURCES

1. Insert a table: <https://support.office.com/en-us/article/Insert-a-table-A138F745-73EF-4879-B99A-2F3D38BE612A>
2. Add, format, or delete captions in Word: <https://support.office.com/en-us/article/add-format-or-delete-captions-in-word-82fa82a4-f0f3-438f-a422-34bb5cef9c81>
3. Convert text to a table or a table to text: <https://support.office.com/en-us/article/Convert-text-to-a-table-or-a-table-to-text-b5ce45db-52d5-4fe3-8e9c-e04b62f189e1>
4. Use mail merge for bulk email, letters, labels, and envelopes: <https://support.office.com/en-us/article/use-mail-merge-for-bulk-email-letters-labels-and-envelopes-f488ed5b-b849-4c11-9cff-932c49474705>
5. Set up a new mail merge list with Word: <https://support.office.com/en-us/article/Set-up-a-new-mail-merge-list-with-Word-1a752328-b1b5-4865-96a2-e0acd561fe6f>

## PROJECTS AND EXERCISES

|  |  |  |
| --- | --- | --- |
|  | **Data file** | **Save As** |
| Hands-On Exercise 1 | w03h1Traylor.docx | w03h1Traylor\_LastFirst.docx |
| Hands-On Exercise 2 | w03h1Traylor\_LastFirst.docx w03h2KeyFindings.docx  w03h2Text.docx | w03h2Traylor\_LastFirst.docx |
| Hands-On Exercise 3 | w03h3Letter.docx  w03h3Trustees.xlsx | w03h3Letter\_LastFirst.docx  w03h3Merged\_LastFirst.docx |
| Practice Exercise 1 | w03p1Academics.docx  w03p1Sponsors.docx  w03p1Faculty.xlsx | w03p1Academics\_LastFirst.docx  w03p1AcademicsMerged\_LastFirst.docx |
| Practice Exercise 2 | w03p2Letter.docx  w03p2Members.xlsx | w03p2Letter\_LastFirst.docx  w03p2LetterMerged\_LastFirst.docx |
| Mid-Level Exercise 1 | w03m1Football.docx  w03m1Universities.xlsx | w03m1Football\_LastFirst.docx  w03m1FootballMerged\_LastFirst.docx |
| Mid-Level Exercise 2 | w03m2Fresh.docx  w03m2Grocers.xlsx | w03m2Fresh\_LastFirst.docx  w03m2FreshMerged\_LastFirst.docx |
| Running Case | w03r1NewCastle.docx  w03r1Clients.xlsx | w03r1Newcastle\_LastFirst.docx  w03r1NewCastleMerged\_LastFirst.docx |
| Disaster Recovery | w03d1Planner.docx | w03d1Planner\_LastFirst.docx |
| Capstone | w03c1Boston.docx  w03c1Image1.jpg  w03c1Image2.jpg  w03c1Image3.jpg  w03c1Sponsors.xlsx | w03c1Boston\_LastFirst.docx  w03c1BostonMerged\_LastFirst.docx |

## CHAPTER REVIEW/ANSWERS TO END OF CHAPTER MATERIAL

### Key Terms Matching Answer Key

1. The position of a table between the left and right document margins.

**S. Table alignment**

1. A descriptive title for a table.

**D. Caption**

1. A document used in a mail merge process with standard information that you personalize with recipient information.

**G. Form letter**

1. A line that surrounds a Word table, cell, row, or column.

**B. Border**

1. A named collection of color, font, and border design that can be applied to a table.

**T. Table style**

6. A background color that displays behind text in a table, cell, row, or column.

**Q. Shading**

1. A combination of cell references, operators, and values used to perform a calculation.

**H. Formula**

1. The intersection of a column and row in a table.

**E. Cell**

1. A process that combines content from a main document and a data source.

**K. Mail Merge**

1. Contains the information that stays the same for all recipients in a mail merge.

**L. Main document**

1. An indicator that displays between rows or columns in a table, enabling you to insert one or more rows or columns.

**J. Insert control**

1. Organizes information in a series of rows and columns.

**R. Table**

13. A list of information that is merged with a main document during a mail merge procedure.

**F. Data source**

1. Determines the sequence by which operations are calculated in an expression.

**N. Order of operations**

1. Serves as a placeholder for the variable data that will be inserted into the main document during a mail merge procedure.

**M. Merge field**

1. A pre-built formula that simplifies creating a complex calculation.

**I. Function**

1. Feature that enables you to choose border formatting and click on any table border to apply the formatting.

**C. Border Painter**

1. A positional reference contained in parentheses within a function.

**A. Argument**

1. A group of related fields representing one entity, such as a person, place, or event.

**R. Record**

1. A series of adjacent cells.

**O. Range**

### Multiple Choice Answer Key

1. In which of the following scenarios would you filter a data source in preparation for a mail merge?

**b. When mailing a promotional document to recipients in a particular zip code, excluding others**

2.When you use the Table command on the Insert tab, Word inserts a table in a document, automatically aligning it:

**c. at the left margin.**

1. Which of the following is true regarding the use of AutoFit to adjust the size of rows and columns in a table?

**a. Even after AutoFit is enacted you can still manually adjust rows and columns.**

1. Why might you choose to draw a table instead of using the Table command on the Insert tab?

**a. You know that rows and/or columns will have varying heights or widths.**

1. You plan to place a function or formula in cell B4 of a Word table to total the cells in the column above. How would that function or formula appear?

**a. =SUM(ABOVE)**

1. Which of the following is a purpose of a caption?

**c. To provide appropriate citation of a source from which the table was drawn.**

1. Enhancing the appearance of a table by applying colors, borders, shading, and other design elements (as a set) is made possible by which of the following features?

**a. Table styles**

8. Which of the following best describes the purpose of a mail merge process?

**a. To produce a document or email message in which variable data is drawn from a data source and combined with a main document.**

9. Why might you choose to convert text in a document to a table?

**a. Because you want to manage the data by sorting rows or by applying other table features such as formulas or attractive table design.**

10. Having applied custom borders to a table, what feature do you use to copy the border style to another table?

**c. Border Painter**

### Quick Concept Check Answer Key

1. **Explain why it is sometimes beneficial to merge cells in a table, as well as when it might be best to split cells.**

Merging cells is beneficial when a title or summary is to be centered across a table or across several columns. Splitting cells, which is the reverse of merging, divides a selection into smaller parts so that more detail can be included.

1. **Describe a table that would be best designed by drawing instead of inserting.**

If an intended table is to include rows or columns of varying height or width, it might be easier to draw the table rather than to insert it. A table that is inserted contains uniform rows and columns which must then be modified to include more variance in height or width.

1. **Describe a situation in which you would want to increase cell margins. Also provide an example of when reducing cell margins would be beneficial.**

Cell margins provide white space inside a cell as well as spacing between cells. To make a table more open and readable, you can increase cell margins. Other tables, such as those that include pictures, would benefit from reduced or eliminated cell margin space.

1. **Differentiate between the use of a function and a formula in a table. When would one be preferable to another? Provide several examples.**A function is a built-in formula that summarizes a calculation in an abbreviated fashion. For example, the function =SUM(ABOVE) totals all cells in the column above, regardless of how many cells are involved. If a column contains more than a few rows of numeric data, a function is typically preferable to a formula, as the formula would have to list each cell involved. A function does not exist for every possible formula, however, in many cases, a formula is the only alternative to representing a calculation and should be used instead of a function.
2. **Provide an explanation of why a table formula that sums row data does not include data from a newly added row. Explain what can be done to cause the sum to be correct.**A table formula does not automatically update when new data is added that affects the formula. If a formula sums row data, and new data is added in the row, you must force the formula to update by selecting Update Field in a shortcut menu.
3. **Describe a situation in which it would be beneficial to convert an existing list of tabbed text into a table.**

Tabbed data can be an attractive way to display text. However, if that text contains numbers that should be totaled or otherwise included in a calculation, it would be beneficial to convert the list into a table. Text that is included in a table is also easy to manipulate in ways that align it differently or facilitate the inclusion of headings.

1. **Explain the importance of giving fields in a data source recognizable headings, such as LastName or Title.**

A data source that is to be merged with a main document should contain recognizable headings so that a match can more easily occur. For example, an address block is recognized as including such items as last name and first name. If those headings are evident in a data source, they are more likely to be used as intended in a Word document.

1. **Provide rationale for using Mail Merge, explaining why it is useful and in what situations.**

A mail merge process facilitates creation of personalized documents that include variable data that is retrieved from a data source. In situations where you intend to produce documents, labels, or email in duplicate, while also being personalized for the recipient, mail merge is the perfect solution.

1. **Describe types of data sources that can be used in a mail merge process, explaining strengths of each data source and why you might choose one over the other**.A data source for a mail merge process can be a Word table, an Excel worksheet, an Access table or query, or an Outlook contact list. A Word table is simple to develop but does not include the full functionality and strength in summarizing as an Excel worksheet or Access table. If you have an Outlook account, the accessibility of contact information makes it a good choice for such routine mail merge procedures as addressing labels, envelopes, or inside addresses of form letters.