CREATE A DATABASE USING MICROSOFT WORKS

Please realize Microsoft Works was discontinued after version 9, released in 2007. Word no longer recognizes Works databases for use in Mail Merge. If you want to be prepare, make sure you convert your Works databases into Excel files. To do this, you can save your Works database as an Excel file within Works by SAVE AS.

1. Choose Blank Database
2. Add fields, depending on the type of database.
   - Remember, more (too many) fields are better than too few.
   - May want to include special fields to use later in sorting or filtering
     - (Such as the Field "Groups" to differentiate friends, family, work associates, etc. terms which you may later want to "filter" by).
   - To add a field, simply start typing (the highlighted "field#" will change to the word or words you type.
     - Then click "Add", or just hit the ENTER key.
3. Once you have added all the desired fields, click Done.
   - You will be able to add more fields, or subtract them later if necessary.
4. Now you have a spreadsheet-like document.
   - You can begin by adding information into each of the field blocks (cells).
   - Hitting the TAB key moves to the next field to the right.
   - Hitting the ENTER key moves to the next cell (record) down.
   - Similarly, holding down the SHIFT key and hitting TAB moves to the previous field to the left.
   - Holding the SHIFT key while hitting the ENTER key moves to the prior cell (record) above.
   - When you select a cell, typing REPLACES the entire contents
     - To only modify an entry (add or subtract characters, use the Function bar at the top.
5. That is all there is to create a database. Remember to Save **Often** during this process! And remember where you saved it, and the name you gave it.

Formatting the Field in Works
- Format menu/Fields (or right-clicking a column header) allows control of the appearance of the entire field (such as number, such as date, money, commas or not, etc.)
  - Example, to get a 06421 zip code (starts with zero) to display as 06421 instead of 6421
    - Right-click on the Zip code Field
    - Go to Format/Field
    - On the Field tab, click in the button (put the dot it) "Number"
    - Now look to the right, and scroll down in the Appearance box until you see the 01235. This tells Works you want the number to appear exactly like you entered it (not to exclude the zeros in front)
  - Can change the appearance of any Field of cells this way
    - Can also change format of any individual cell, or Row

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MORE ABOUT FILLING IN DATA
- In LIST (SPREADSHEET) VIEW
    - Insert data just like a spreadsheet
    - Using <CTRL> key + " (quotation marks) causes the field above to be copied to the cell below
        - Click in the cell, then the CTRL"
    - First selecting a cell, and all the desired cells below, then using <CTRL> key + d causes the same data to be filled into all the cells selected below
        - Use this as example when several names have the same address and/or phone number
    - Can add Fields just like you did columns in spreadsheet, by right-clicking on a Field
        - Choose Insert Field
        - Then before or after
    - Similarly you can add a record by right-clicking on a Record number
        - Always insert **above** the Record right-clicked
    - Change Field size (number of characters allowed) either by hovering over the vertical dividing line between the Field you wish to change and the one just before it (it becomes a double-directional arrow labeled "adjust"), then double-clicking. The Field adjusts automatically
        - Or highlight the cell or Field, go to Format/Field Width and choose "Best Fit"
- Difference between cutting a field's data, and deleting
    - Cutting places the field data in clipboard for later pasting
        - Cutting an entire field is the same as deleting
    - Deleting, it is gone
        - To undo, quickly use CTRL-Z, or Edit/Undo
- ON FORM VIEW
    - Field has line after to fill in data
    - Add fields using Insert menu or right-clicking in a blank area
    - The CTRL key shortcuts don't work
    - Cannot change Field size
        - Must use Form Design View Field going to Format/Field Size

MARKING FIELDS, UNMARKING
- You can also "Mark Records" and filter by marked records.
- Use the List view
- Place check in left margin
- To filter by marked records, first mark the record (check), or unmark the record (remove the check).
- Next go to the Record menu and choose "Show" then click on "Marked Records".
    - Vice versa, select "Unmarked records" to show only unchecked records. Now you can apply any other field filters to only the marked or unmarked records.
- When Filters or "show records" has been applied, only the records which meet all the criteria will be visible.
    - Those are the only records which will print (check Print Preview to verify).

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SORTING RECORDS

- Record/Sort Records
    - Choose Field you wish to sort by
    - Unlike spreadsheet, the entire row of data gets sorted together, even without selecting
    - Choose Ascending or Descending
- You can sort records alphabetically by any desired field.
    - Simply go to the Record menu and choose "Sort Records".
    - A box comes up allowing you to decide which field you wish to sort by initially (and whether ascending or descending)
    - And also which you wish to sort by second, and third.
    - In other words, you could sort first by the Last Name field, then within those, sort by the First Name, and finally by State (so Dupré, Jim would be before Dupré, Linda; also Jim Dupré in Colorado would be before Jim Dupré in Florida).

FILTERING RECORDS

- Tools/Filters
    - Give filter a name
    - Choose Field to filter by
    - Choose what parameters (equal to, etc.)
    - Give value to compare
    - Apply Filter
- Specifically, if you want to "filter" out only those with certain last names, or certain states, or family
    - Go to the Tools menu and choose "Filters…".
    - The box which comes up allows you to choose which field to filter by, such as "Last Name", or "State", or "Family".
    - You can set up to five fields to use as filters simultaneously.
    - You can also "Mark Records" and filter by marked records.
        - To filter by marked records, first mark the record (check), or unmark the record (remove the check).
        - Next go to the Record menu and choose "Show" then click on "Marked Records".
        - Vice versa, select "Unmarked records" to show only unchecked records. Now you can apply any other field filters to only the marked or unmarked records.
        - When Filters or "show records" has been applied, only the records which meet all the criteria will be visible.
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PRINTING HINTS
- To add gridlines or field names
    - Use Page Setup "Other" tab to add fields and gridlines.
    - Use Tools/ReportCreator to print only certain fields, or filter only certain records.
    - Alignment can be controlled by choosing "Format" menu.
    - Column widths can be adjusted by dragging, in list mode, just like spreadsheet

PRINTING DATABASES or REPORTS
- Use Preview function (toolbar button, or File/Print Preview)
- In List View
    - Remember Portrait vs. Landscape for getting all data on page
- In Form View
    - One record to a page, File/Page Setup, check "Page Break between records"
    - File/Page Setup also allows "Print the field lines" prints the line beneath the data

OTHER USES FOR DATABASES
- Create a printable Report (using only select Fields)
- Merge with labels or envelopes
- Merge with letters (documents)

CREATING A REPORT
1. On the Tools menu, click ReportCreator.
2. Type a name of up to 15 characters for your report.
3. Click OK.
4. In the Report title box, type the title you want to appear on your report.
5. Click the Fields tab.
6. In the Fields available list, double-click each field (a column in List view that shows a category of information, such as a serial number or purchase date) you want to add to the report.
7. Customize the report by sorting, grouping, filtering, and adding summary information.

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PRINTING LABELS (as an example of Merging)

- Start the Microsoft Works (not Word) word processor (if you have works suite).
  - If it isn't showing in Start/Programs you must add the shortcut
    - It is under C:\Program Files\Microsoft Works\wkswp.exe
    - Create shortcut then move the shortcut to Start Menu
- Go to Tools and choose *Labels*
  - Choose desired task, specifically "Mailing labels" (this brings up the merge dialogs
  - Pick type label
    - From size
    - From label number
  - Choose source of database to merge
    - Typically "from another type of file"
    - Not Address book, that is Outlook Express
    - A box with the Fields appears
  - Design label
    - Place fields
    - Remember the spaces and punctuation
- Hints
  - Skipping empty fields
    - Establish label, merged data, and label design
    - Go to File/Print
    - Under Mail Merge Print Settings, check "Don't print lines with empty fields
    - Click OK
  - Remember to use Print preview first to check it before ruining labels
    - Print or close/cancel and edit

Make Labels From Only Marked Files In Ms Works 6.0 And Later

- First, you must start a new **Works** word processing document
  - Again, not Word, but Works
- Go to Tools, and choose Labels.
- Then create your labels and merge address file as you would normally.
- Once you have this established, you again go to Tools, but this time choose mail merge, then filter and sort. When this window comes up you can click on the "use marked records" box, and there you have it. You get labels of only the marked records.

Other Information about Works Database

Three Views
- o List View
    - ▪ Looks like Spreadsheet
    - ▪ Acts much like spreadsheet
    - ▪ A B C… typical spreadsheet headings are replaced by the **field names** you designated
    - ▪ Still has the 1 2 3… like a spreadsheet, but instead are **record numbers**
    - ▪ Can insert data or fields just like a spreadsheet
    - ▪ Slightly more difficult to create sums or formulas   (see help)
- o Form View
    - ▪ Allows you to fill in the data in a form-like appearance
    - ▪ One record to a page, File/Page Setup, check "Page Break between records"
    - ▪ "Print the field lines" prints the line beneath the data
    - ▪ Change from Record to Record at the bottom or window
- o Form Design
    - ▪ Use this form design view to create the appearance you want the **record** to have when they print, by dragging fields into the desired position
    - ▪ This is also where you can format the field such as size (size = number of characters)
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Use the Records Menu
- • Mark or Unmark all records
- • Hide record
    - o Note, a hidden record's number is missing
- • Show
    - o All
    - o Marked
    - o Unmarked
    - o Hidden