



Microsoft® Office

Word 2013

Stockton University

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Program Fundamentals

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Microsoft Word is a powerful word-processing program that gives users the tools to create a variety of professional documents. Word automatically checks your spelling and grammar and corrects common mistakes. It even lets you insert charts, tables, and pictures into your documents. Microsoft Word is the most widely used and, according to most reviews, the most powerful and user-friendly word-processor available.

If you're moving from Word 2010 or earlier to Word 2013, you'll see that Word has undergone a major redesign. You'll still be familiar with much of the program's functionality, but you'll notice a completely new user interface and many new features that have been added to make using Word more efficient.

This chapter is an introduction to working with Word. You'll learn about the main parts of the program screen, how to give commands, use help, and about new features in Word 2013.

Starting Word 2013

In order to use a program, you must start—or launch—it first.

Windows 7

1. Click the **Start** button.

The Start menu appears.

2. Click **All Programs**.

The left pane of the Start menu displays the programs and menus installed on your computer.

3. Click **Microsoft Office**.

4. Select **Microsoft Word 2013**.

The Word 2013 program screen appears.

 **Other Ways to Launch a Program:**

Click the **Start** button and type the program name in the Search box. Click the program in the search results to launch it.

 **Tips:**

- ✓ Depending on how your computer is set up, the procedure for starting Word 2013 might be a little different from that described here.
- ✓ If you use Word 2013 frequently, you might consider pinning it to the Start menu. To do this, right-click **Microsoft Word 2013** in the All Programs menu and select **Pin to Start Menu** from the contextual menu.
- ✓ Windows 7 users can also pin a program to the taskbar. To do this, right-click the **Word** button in the taskbar and select **Pin this program to taskbar** from the contextual menu.

Exercise

- **Exercise File:** None required.
- **Exercise:** Start the Microsoft Word 2013 program.

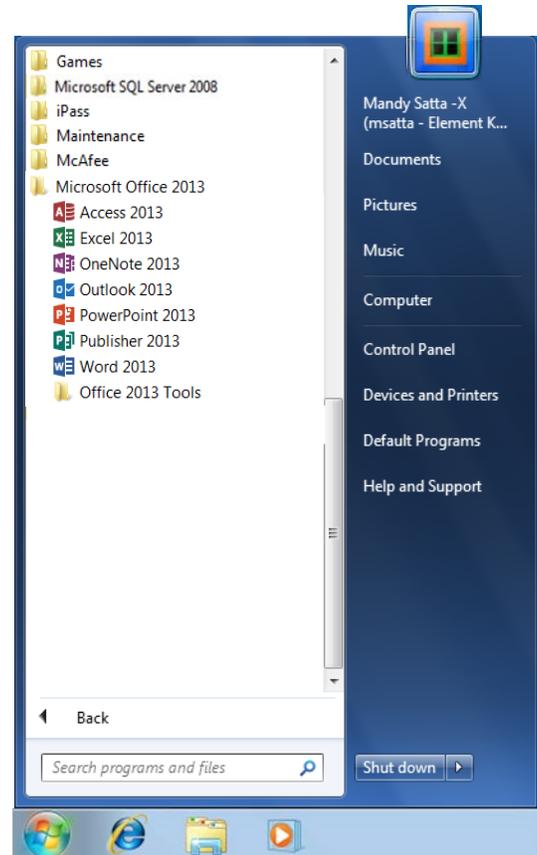


Figure 1-1: The All Programs menu in Windows 7.

What's New in Word 2013

Word 2013 is very different from previous versions. The table below gives you an overview of what to expect.

Exercise

- **Exercise File:** None required.
- **Exercise:** Review the new features in Microsoft Office Word 2013.

Table 1-1: What's New in Word 2013

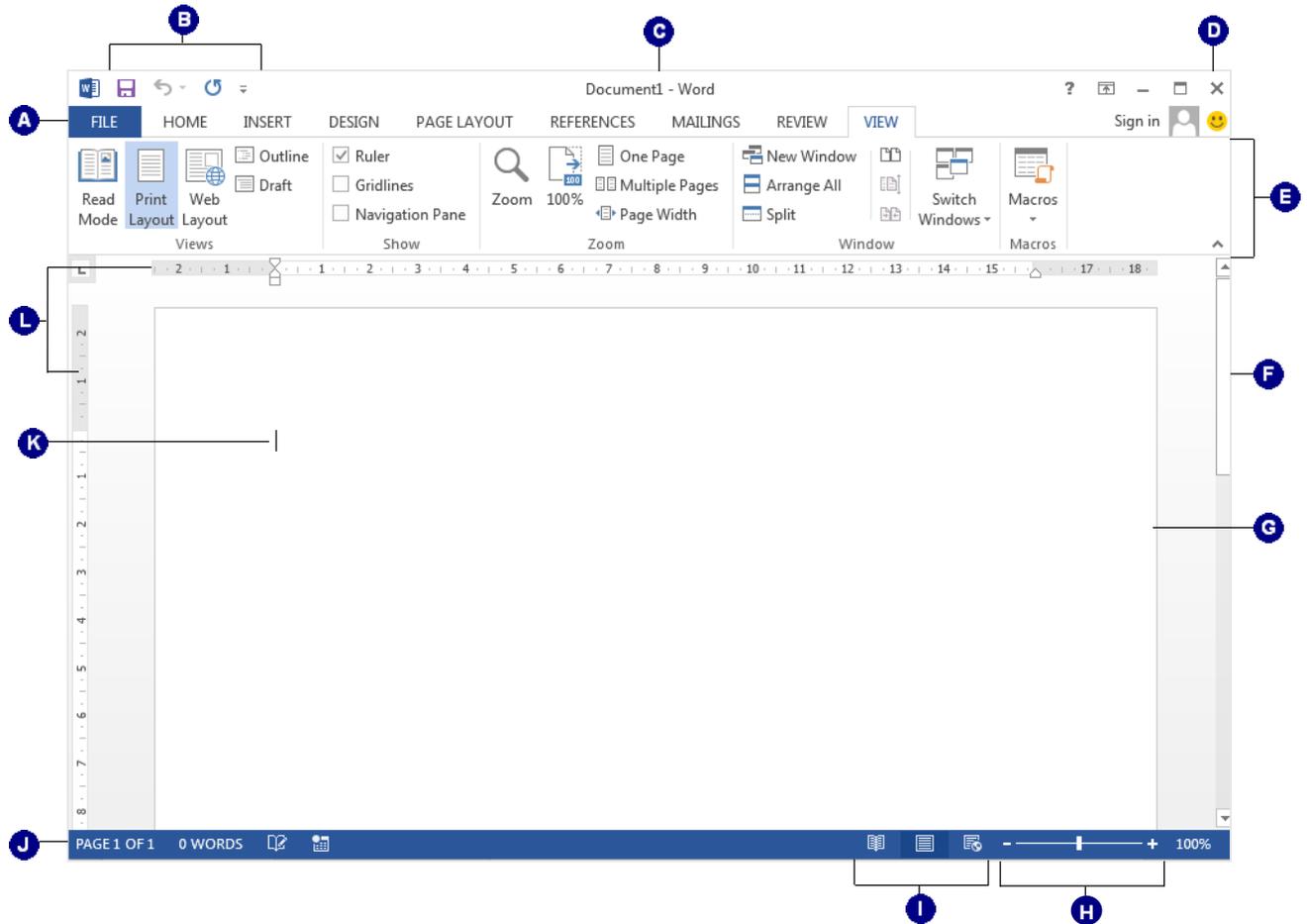
Improved Ribbon	The Ribbon makes all the commands needed to work with a program readily available. The Ribbon was introduced in Word 2007, but has been improved in Word 2013: now you can create your own tabs and groups for the Ribbon. You can also rename or change the order of default tabs and groups.
Backstage View	Backstage view is where you open, save, print, share, and manage your files and program options. To access Backstage view, click the FILE tab on the Ribbon.
Document Management	Three new tools help you manage, protect, and share your documents: Recover previous versions lets you revert to an earlier version of your document. Protected view helps protect your computer from online attacks when opening files from the Internet. Trusted documents remembers which files you trust so you aren't prompted each time the file is opened.
Paste with Live Preview	Allows you to preview how pasted content will look with various paste options before you paste it.
More Themes and Styles	Predefined styles and themes let you change the overall look and feel of a document in a few clicks. Now Office 2013 has even more themes you can apply to your documents.
Improved Picture-Editing Tools	There are many new ways to edit pictures and take images in your documents. Insert screenshot: You can take a screenshot or screen clipping and add it to your documents. Improved SmartArt: Now you can add SmartArt that uses photographs. Other tools: New picture editing tools let you refine the brightness, contrast, or sharpness of a picture; add artistic effects; and control cropping and compression.
Accessibility Checker	The Accessibility Checker lets you find and fix issues that can make it difficult for people with disabilities to read or interact with your document.
Language Tools	Improved language tools let multilingual users set preferences for language settings in Office 2013.
Navigation Pane	The Navigation Pane combines Word's search functions and document map to make it easier than ever to work with long documents. Leave the Navigation Pane open so you can browse a document's headings or pages without leaving the main document.
Improved Text Effects	Apply text effects, such as shadow or glow, to any text in a document.
Advanced Typographical Features	Word 2013 uses OpenType fonts. These fonts support advanced typographical features, such as ligatures and number forms, so you can make your documents look more polished and professional.
Improved WordArt	WordArt has been around for a while, but it has changed quite a bit in Word 2013. New WordArt styles and functionality make it easy to add and format WordArt. It is also treated as text instead of a picture, so your WordArt is searchable in the document.

Understanding the Word Program Screen

The Word 2013 program screen may seem confusing and overwhelming at first. This lesson will help you become familiar with the Word 2013 program screen as well as the new user interface.

Exercise

- **Exercise File:** None required.
- **Exercise:** Understand and experiment with the different parts of the Microsoft Office Word 2013 screen.



<p>A File tab: Contains basic file management commands—such as New, Open, Save, and Close—and program options.</p>	<p>G Document window: This is where you enter and work on document content.</p>
<p>B Quick Access Toolbar: Contains common commands such as Save and Undo. You can add more commands as well.</p>	<p>H Zoom slider: Click and drag the slider to zoom in or out of a slide. You can also use the + and – buttons.</p>
<p>C Title bar: Displays the name of the program you are using and the name of the document you are currently working on.</p>	<p>I View shortcuts: Quickly switch between Print Layout, Full Screen Reading, Web Layout, Outline, and Draft views.</p>
<p>D Close button: Click here to close the current document. If only one document is open, clicking this button will close the Word program as well.</p>	<p>J Status bar: Displays information about your document. Right-click it to specify which information is shown.</p>
<p>E Ribbon: The tabs on the Ribbon replace the menus and toolbars found in previous versions of Word.</p>	<p>K Insertion Point: The small, blinking bar controls where document content is entered. Move the insertion point with the mouse, or the arrow keys on the keyboard.</p>
<p>F Scroll bars: There are both vertical and horizontal scroll bars: you use them to view and move in your document.</p>	<p>L Ruler: Displays left and right paragraph intents, document margins, and tab stops. Click the View Ruler button above the vertical scroll bar to view or hide the ruler.</p>

Giving Commands in Word

Word 2013 provides easy access to commands through the Ribbon, File tab, and Quick Access Toolbar.

Ribbon

The Ribbon keeps commands visible while you work instead of hiding them under menus or toolbars, and it is the primary way to give commands in Word 2013. The Ribbon is made up of three basic components: tabs, groups, and buttons.

Tabs: Commands are organized into tabs on the Ribbon. Each tab contains a different set of commands. There are three different types of tabs:

- **Command tabs:** These tabs appear by default whenever you open the Word 2013 program. In Word 2013, the FILE, HOME, INSERT, PAGE LAYOUT, REFERENCES, MAILINGS, REVIEW, and VIEW tabs appear by default.
- **Contextual tabs:** Contextual tabs appear whenever you perform a specific task, and they offer commands relative to only that task. For example, whenever you select a picture, the FORMAT tab appears in the Ribbon under PICTURE TOOLS.
- **Program tabs:** If you switch to a different authoring mode or view, such as Outline view, program tabs appear next to the default command tabs that appear on the Ribbon.

Groups: The commands found on each tab are organized into groups of related commands. For example, the Font group contains commands used for formatting fonts. Click the **Dialog Box Launcher** (☰) in the bottom-right corner of a group to display even more commands.

- **Trap:** Based on the size of the program window, Word changes the appearance and layout of the commands within groups.

Buttons: One way to issue a command is by clicking its button on the Ribbon. Buttons are the smallest element of the Ribbon and change color when clicked.

Exercise

- **Exercise File:** None required.
- **Exercise:** Click each tab on the Ribbon to view its commands.

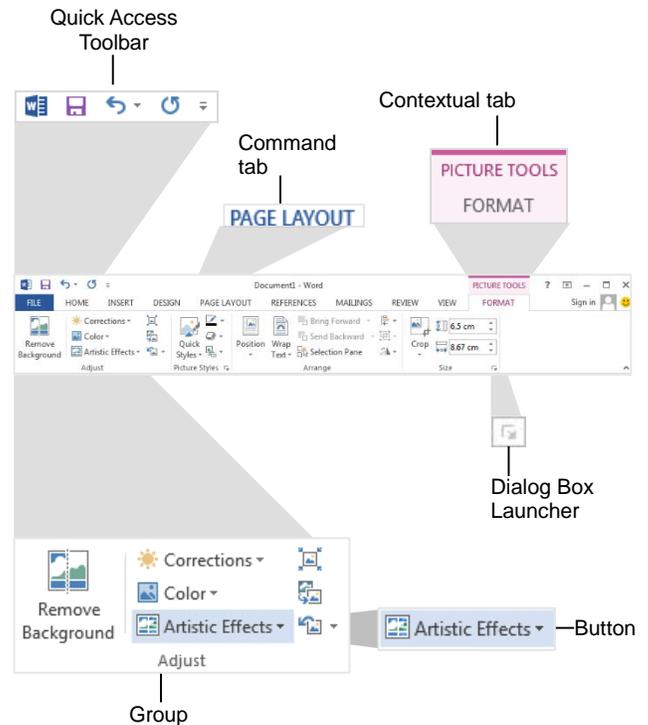


Figure 1-2: Ribbon elements.

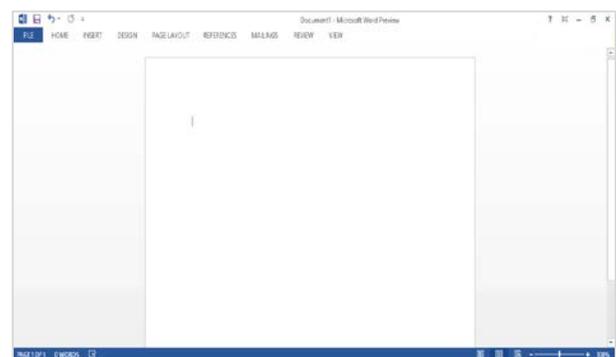


Figure 1-3: The Ribbon with the groups hidden so only the tab names appear.

Tip:

- ✓ You can hide the Ribbon so that only tab names appear, giving you more room in the program window. To do this, double-click the currently displayed command tab. Or, right click a Ribbon tab and select **Collapse the Ribbon** from the contextual menu. To display the Ribbon temporarily again, click any tab; or click the **Ribbon Display Options** () button and select **Show Tabs and Commands**.

FILE tab

The FILE tab appears in the upper-left corner of the program window. When clicked, it opens the Backstage view, which is where you find commands for basic file management, including New, which creates a new file; Open, which opens an existing file; Save, which saves the currently opened file; and Close, which closes the currently opened file. This is also where you find commands for controlling program options and sharing.

Tip:

- ✓ The FILE tab replaces the File menu and Office Button found in previous versions of Word.

Quick Access Toolbar

The Quick Access Toolbar appears above the FILE tab and provides easy access to the commands you use most frequently. By default, the Save, Undo, and Redo buttons appear on the toolbar; however, you can customize this toolbar to meet your needs by adding or removing buttons.

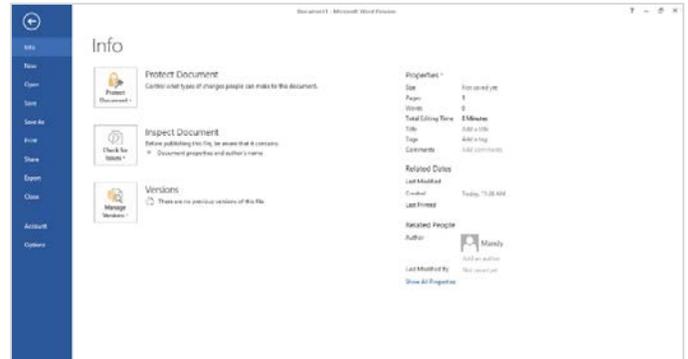


Figure 1-4: The Info tab in Backstage view.

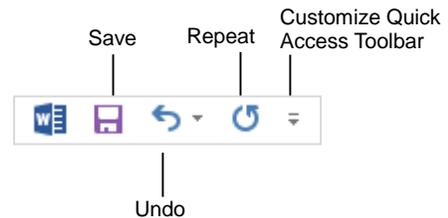


Figure 1-5: The Quick Access Toolbar

Using Command Shortcuts

Command shortcuts provide other ways to give commands in Word. Shortcuts can be a time-saving and efficient alternative to the Ribbon. Use shortcuts for the commands you use most frequently.

Keystroke shortcuts

Keystroke shortcuts are one of the fastest ways to give commands in Word. They're especially great for issuing common commands, such as saving a document. In order to issue a command using a keystroke shortcut, you simply press a combination of keys on your keyboard. For example, rather than clicking the Copy button on the Ribbon to copy text, you could press and hold the copy keystroke shortcut, <Ctrl> + <C>. The table to the right lists other common keystroke shortcuts.

Contextual menus

A contextual menu displays a list of commands related to a specific object or area. To open a contextual menu:

1. Right-click an object or area of the document or program screen.
A contextual menu appears, displaying commands that are relevant to the object or area that you right-clicked.
2. Select an option from the contextual menu, or click anywhere outside the contextual menu to close it without selecting anything.

Mini Toolbar

The Mini Toolbar appears whenever you select text and contains common text formatting commands. To view the Mini Toolbar:

1. Click anywhere in your document and right-click or simply select a phrase or line of text.
The Mini Toolbar appears near the text you selected.
! Trap: Sometimes the Mini Toolbar can be hard to see due to its transparency. To make the Mini Toolbar more visible, point to it.
2. Click a button on the Mini Toolbar. The command is given in Word.
✓ Tip:
If you don't want the Mini Toolbar to appear every time you select a block of text, click the **FILE** tab and click **Options**. Click the **General** category, uncheck the **Show Mini Toolbar on selection** check box, and click **OK**.

Exercise

- **Exercise File:** None required.
- **Exercise:** Memorize some common keystroke shortcuts. Open a contextual menu in the main part of the program window. Make use of the Mini Toolbar.

Table 1-2: Common Keystroke Shortcuts

<Ctrl> + <O>	Opens a document.
<Ctrl> + <N>	Creates a new document.
<Ctrl> + <S>	Saves the current document.
<Ctrl> + <P>	Prints the document.
<Ctrl> + 	Toggles bold font formatting.
<Ctrl> + <I>	Toggles italic font formatting.
<Ctrl> + <C>	Copies the selected text or object.
<Ctrl> + <X>	Cuts the selected text or object.
<Ctrl> + <V>	Pastes the selected text or object.
<Ctrl> + <Home>	Moves the insertion point to the beginning of the document.
<Ctrl> + <End>	Moves the insertion point to the end of the document.

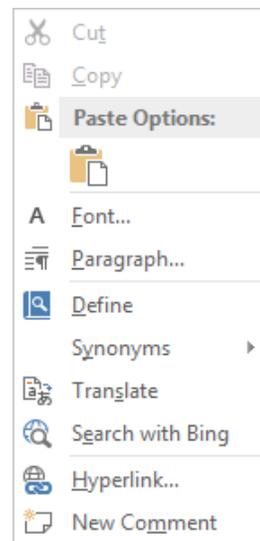


Figure 1-6: A contextual menu.



Figure 1-7: The Mini Toolbar.

Key Tips

Key Tips appear whenever you press the <Alt> key. You can use Key Tips to perform just about any action in Word 2013, without ever having to use the mouse.

To issue a command using a Key Tip, first press the <Alt> key. Tiny letters and numbers, called badges, appear on the Quick Access Toolbar and all of the tabs on the Ribbon. Depending on the command you want to issue, press the letter or number key indicated on the badge.

Repeat this step as necessary until the desired command has been issued.

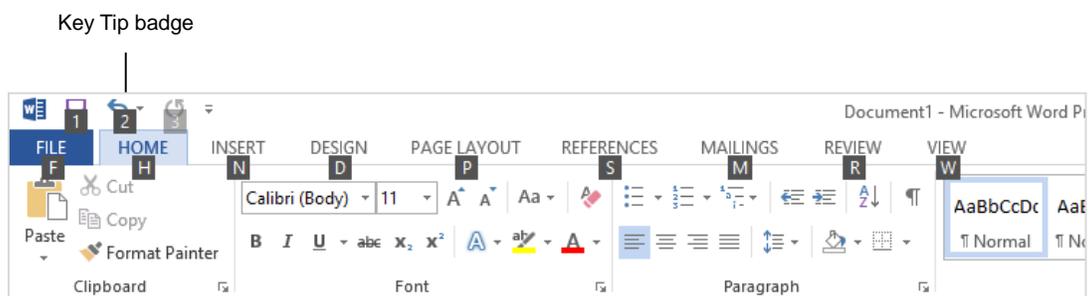


Figure 1-8: Press the <Alt> key to display Key Tips.

Creating a New Document

Creating a new document is one of the most basic commands you need in Word. A new document automatically appears upon starting Word, but it's also helpful to know how to create a new document within the application. You can create a new blank document, such as the one that appears when you open Word, or you can create a new document based on a template.

Create a new blank document

1. Click the **FILE** tab on the Ribbon and select **New**.
The New tab of Backstage view appears. By default, the Blank document option is already selected.

2. Click the **Blank document** option.
The new blank document appears in the Word application screen.

 **Other Ways to Create a Blank Document:**
Press <Ctrl> + <N>.

Create a document from a template

1. Click the **FILE** tab on the Ribbon and select **New**.
The New tab of Backstage view appears. There are several ways to create a document from a template.
 - **Featured templates:** Select a template from the default options available and click **Create**.
 - **Suggested searches:** Select a category link from the available options under the search bar that matches the theme of the template you require. Select the template closest to your requirement from the available options and click **Create**.
 - **Search for a template:** Type a keyword or phrase for the kind of template you require, in the search bar. Select the template closest to your requirement from the available options and click **Create**.
 - **Personal template:** Use a template you have created by selecting the **PERSONAL** link from the menu options above the featured templates. Select the template you wish to use; it will open automatically.
-  **Trap:**
The Personal menu option only appears on the Backstage view, once you have created a template.

Exercise

- **Exercise File:** None required.
- **Exercise:** Create a new blank document.
Create a new document from the blog post template.

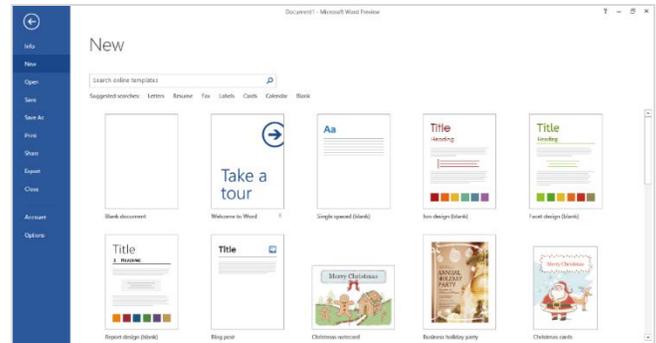


Figure 1-9: The New tab of Backstage view.

Opening a Document

Opening a document lets you work on a document that you or someone else has previously created and then saved. This lesson explains how to open a saved document.

You can locate a document on your computer and simply double-click it to open it, but you can also open a document from within the Word program.

1. Click the **FILE** tab and select **Open**.

Next, you have to browse for the file you want to open. The Open dialog box appears.

Other Ways to Open a Document:
Press <Ctrl> + <O>.

2. Navigate to the location of the saved file.

The Open dialog box has several controls that make it easy to navigate to locations and find files on your computer:

- **Address bar:** Click a location in the Address bar to open it. Click the arrow to the right of a location to open a list of folders within that location. Select a folder from the list to open it.
- **Folders List:** Shortcuts to common locations on your computer, such as the Desktop and Documents library.
- **Search box:** This searches the contents—including subfolders—of that window for the text that you type. If a file's name, file content, tags, or other file properties match the searched text, it will appear in the search results. Search results appear as you enter text in the search box.

3. Select the file you want to open and click **Open**.

Word displays the file in the application window.

Tips:

- ✓ To open a document that has been used recently, click the **FILE** tab and scroll through the **Recent Documents** list.
- ✓ You can pin a document to the Recent Documents list so that it is always available there. Click the **Pin this document to the Recent Documents list** button next to the document that you want to always be available. Click it again to remove the document from the Recent Document list.

Exercise

- **Exercise File:** Business Proposal.docx
- **Exercise:** Open the Business Proposal.docx file located in your Practice folder.

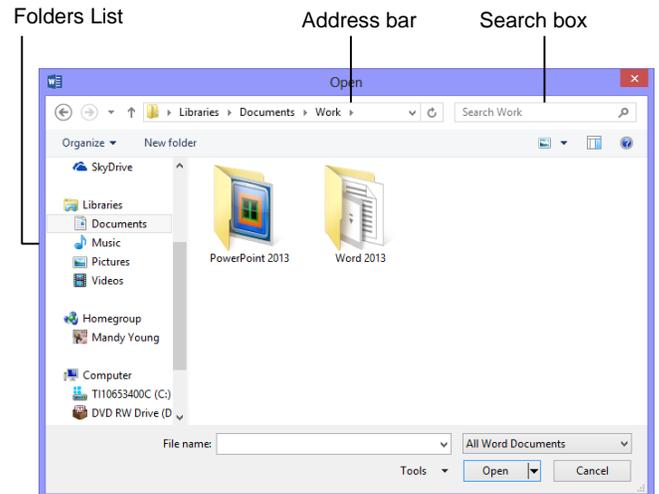


Figure 1-10: The Open dialog box. To open a file, you must first navigate to the folder where it is saved. Most new files are saved in the Documents folder by default.

Previewing and Printing a Document

Once you have created a document, and your computer is connected to a printer, you can print a copy. Before you do this, it's a good idea to preview how it's going to look.

1. Click the **FILE** tab and select **Print**.

Notice that the print settings and a preview of the document appear together, with print settings on the left and a preview on the right.

✔ **Tip:** Use the scroll bar or the page navigation controls below the preview to view other pages in the document.

🔗 **Other Ways to Preview and Print:**
Press **<Ctrl> + <P>**.

After previewing the document, you can specify printing options, such as which pages or the number of copies to print.

2. Specify printing options and click the **Print** button.

The document is sent to the printer.

Exercise Notes

- **Exercise File:** Business Proposal.docx
- **Exercise:** Preview and print the document.

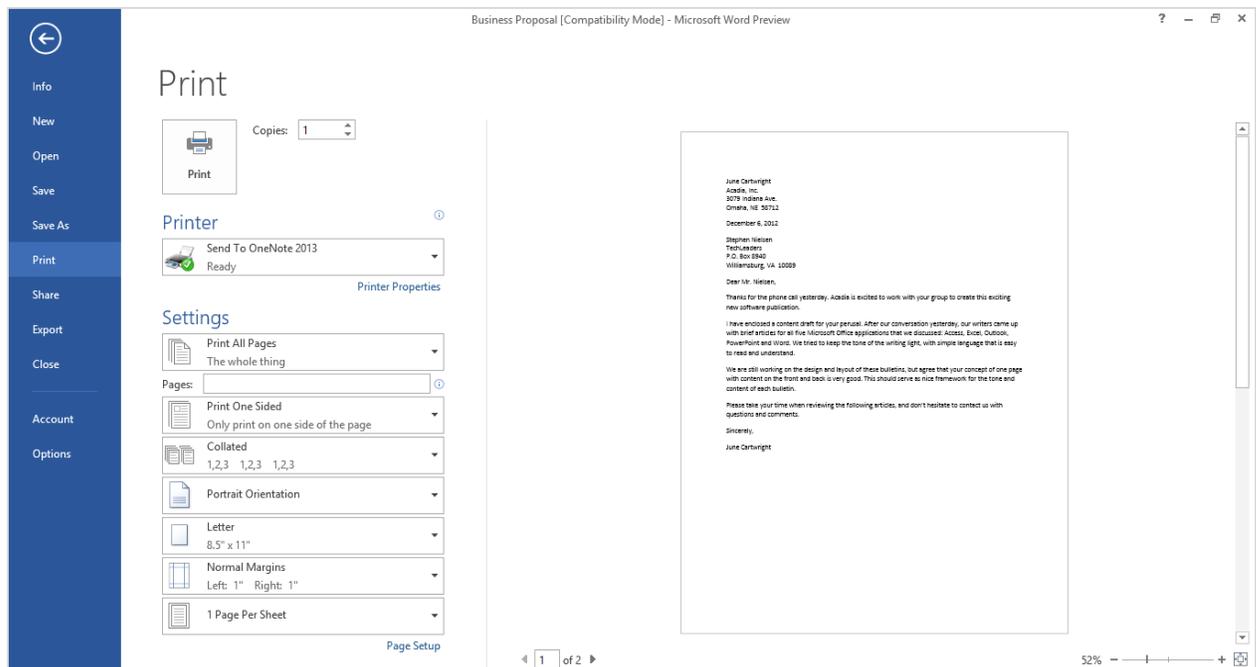


Figure 1-11: The Print Settings and Print Preview as shown in Backstage view. Use the print settings in the left column to control how the document is printed. Use the print preview area in the right column to preview how the document will look when printed.

Saving a Document

After you've created a document, you need to save it if you want to use it again. Also, if you make changes to a document you'll want to save it. You can even save a copy of an existing document with a new name, to a different location, or using a different file type.

Save a new document

1. Click the **Save** button on the Quick Access Toolbar.

The Save As backstage view appears.

 **Other Ways to Save:**

Press **<Ctrl> + <S>**. Or, click the **FILE** tab and select **Save As**.

2. Specify the drive and/or folder where you want to save your document.

The Save As dialog box appears. It has several controls that make it easy to navigate to locations on your computer:

- **Address bar:** Click a location in the Address bar to open it. Click the arrow to the right of a location to open a list of folders within that location. Select a folder from the list to open it.
- **Folders list:** Shortcuts to common locations on your computer, such as the Desktop and Documents folder.
- **Search box:** This searches the contents—including subfolders—of that window for the text that you type. If a file's name, file content, tags, or other file properties match the searched text, it will appear in the search results. Search results appear as you enter text in the Search box.

3. Enter the file name in the File name text box.

4. Click **Save**.

Save document changes

- Click the **Save** button on the Quick Access Toolbar.

Any changes you have made to the document are saved.

 **Other Ways to Save:**

Press **<Ctrl> + <S>**. Or, click the **FILE** tab and select **Save**.

Exercise

- **Exercise File:** None required.
- **Exercise:** Save a new blank document with the file name "Saved Document" to your Desktop.

Enter your name at the top of the document and save the document on your Desktop with the new name "Updated Document".

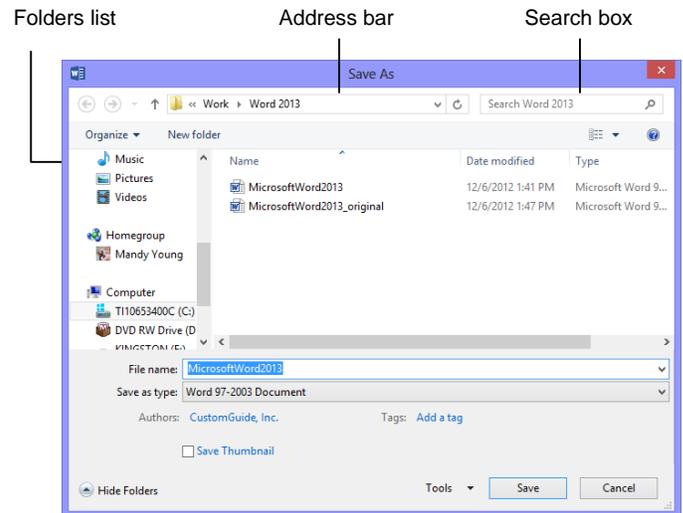


Figure 1-12: The Save As dialog box. The Documents library is the default location for saving, but you can change the save location as necessary.

Save a document under a different name and/or location

Saving a document under a different name or in a different location does not delete the original file. It saves a copy of the file under a new name or in a new location.

1. Click the **FILE** tab and select **Save As**.
The Save As backstage view appears.
2. Navigate to the new location to save the file.
The Save As dialog box appears.
3. Enter a different name for the file in the File name text box.
4. Click **Save**.

Save a document as a different file type

Just as some people can speak several languages, Word can read and write in other file formats. Saving a document in a different file type makes it easier to share information between programs.

1. Click the **FILE** tab and select **Save As**.
The Save As backstage view appears. Choose a location to save the file. The Save As dialog box opens.
2. Click the **Save as type** list arrow and select a new file format.
See **Table 1-3: Common Word File Formats** for brief descriptions of some of the file formats you can use to save a document.
3. Click **Save**.
A copy of the document is saved in the new format.

Table 1-3: Common Word File Formats

Word Document (.docx)	This is the default format for Word 2013 documents.
Word Macro-Enabled Document (.docm)	This file format supports macros in Word 2013.
Word 97-2003 Document (.doc)	Documents in this format can be read used by all versions of Word. It does not support XML.
PDF (.pdf)	Use this format for files you want to share, but do not want to be changed.
Web page (.htm, .html)	This format is used to create pages to be viewed on the Web.
Rich Text Format (.rtf)	Many of a document's formatting properties remain, but can this file type be read by more programs.
Plain Text (.txt)	Only text is saved in this file type. Any document formatting is removed.
Word XML Document (.xml)	This file type is used exclusively for XML-enabled documents.

Closing a Document

When you're done working on a document, you need to close it.

- Click the **FILE** tab and select **Close**.

The document closes, and you can access the file again by opening it later.

Other Ways to Close a Document:

Press **<Ctrl> + <W>**. Or, click the **Close** button on the title bar if you have multiple Word documents open.

Trap: If you click the **Close** button on the title bar when you have only one Word document open, the document will close and you will exit the Word program.

Tip: If you have not saved the document since making changes, a dialog box will appear asking if you want to save changes to the document. Click **Save** if you wish to save your changes; click **Don't Save** if you do not want to save your changes; click **Cancel** if you do not want to close the document.

Exercise Notes

- **Exercise File:** Any open document.
- **Exercise:** Close the document.

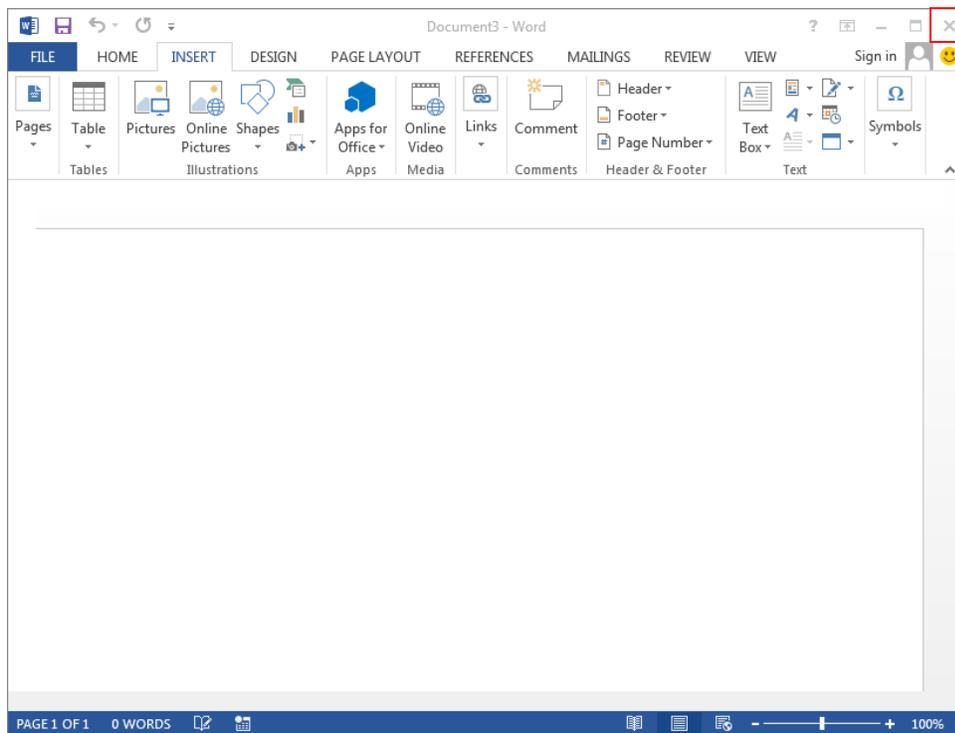


Figure 1-13: Select the Close button from the Title bar to close a document.

Using Help

When you don't know how to do something in Word 2013, look up your question in the Word Help files. The Word Help files can answer your questions, offer tips, and provide help for all of Word's features.

Search for help

1. Click the **Microsoft Word Help** button (?) on the Title bar.

The Word Help window appears.

Other Ways to Open the Help Window:
Press <F1>.

2. Type what you want to search for in the "Search help" box and press <Enter>.

A list of help topics appears.

3. Click the topic that best matches what you're looking for.

Word displays information regarding the selected topic.

Browse for help

1. Click the **Microsoft Word Help** button (?) on the Title bar.

The Word Help window appears.

Other Ways to Open the Help Window:
Press <F1>.

2. Click the category that you want to browse.
The topics within the selected category appear.

3. Click the topic that best matches what you're looking for.

Word displays information regarding the selected topic.

Choose the Help source

If you are connected to the Internet, Word 2013 retrieves help from the Office Online database by default. You can easily change this to meet your needs.

1. Click the **Word Help** list arrow button.
A list of help sources appears.

Exercise

- **Exercise File:** None required.
- **Exercise:** Search for the term "text effects". Browse topics in the "Margins" category of Help. Change the Help Source to your computer.

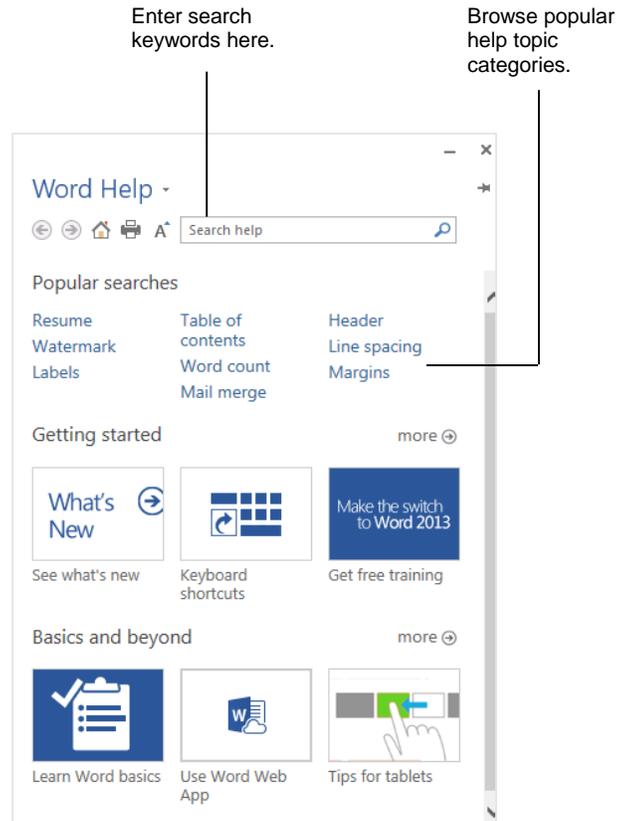


Figure 1-14: The Word Help window.

2. Select an option from the list.

Now you can search from that source.

 **Tips:**

- ✓ Office 2013 offers enhanced ScreenTips for many buttons on the Ribbon. You can use these ScreenTips to learn more about what a button does and, where available, view a keystroke shortcut for the command. If you see the message “Press F1 for more help”, press <F1> to get more information relative to that command.
- ✓ When you are working in a dialog box, click the **Help** button () to open the Word Help Home page.

Table 1-4: Help Buttons

	Back	Click here to move back to the previous help topic.
	Forward	Click here to move forward to the next help topic.
	Home	Click here to return to the Help home page.
	Print	Click here to print the current help topic.
	Change Font Size	Click here to change the size of the text in the Help window.
	Keep On Top	Click here to layer the Help window so that it appears behind all other Microsoft Office programs.

Exiting Word

When you're finished using Word 2013, you should exit it. Exiting a program closes it until you need to use it again.

1. Click the **FILE** tab and select **Close**.

The Word program closes.

Other Ways to Exit Word 2013:

If you only have one document open; right-click the **Word** button on the Quick Access Toolbar and select **Close**, or click the **Close** button on the Title bar.

Tips:

- ✓ Having too many programs open at a time could slow down your computer, so it's a good idea to exit all programs that aren't being used.
- ✓ If you have not saved the document since making changes, a dialog box will appear asking if you want to save changes to the document. Click **Save** if you wish to save your changes; click **Don't Save** if you do not want to save your changes; click **Cancel** if you do not want to close the document.

Exercise

- **Exercise File:** None required.
- **Exercise:** Exit the Microsoft Office Word 2013 program.

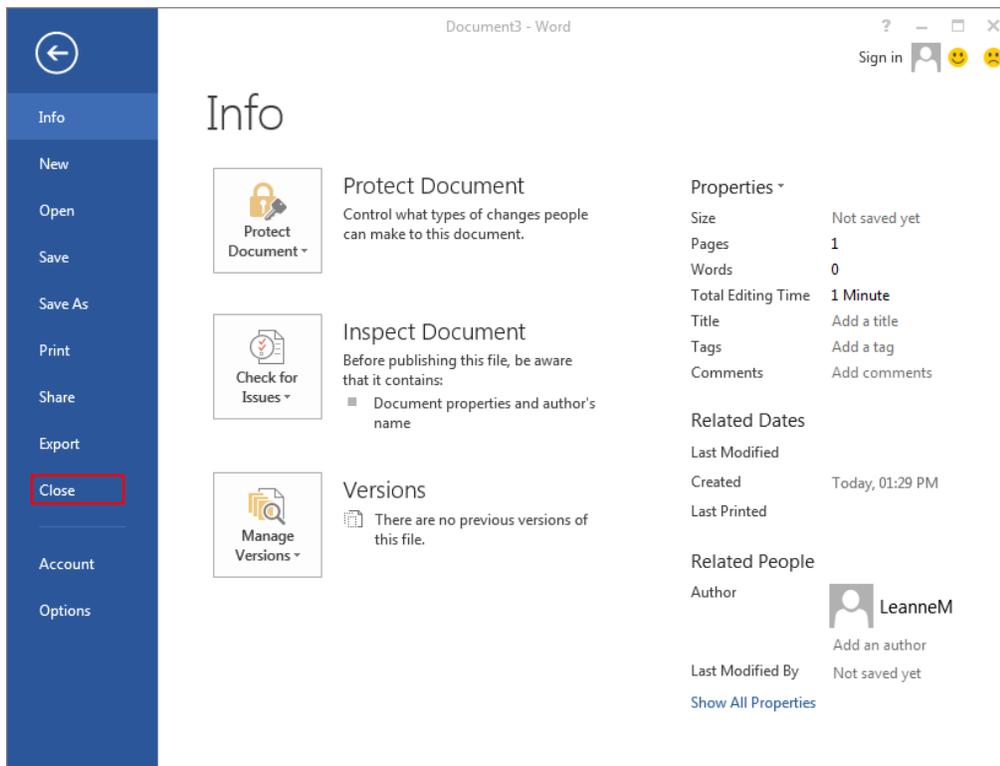


Figure 1-15: Exiting Microsoft Word.

Program Fundamentals Review

Quiz Questions

1. Word 2013 automatically opens with Windows. (True or False?)
2. Which of the following is NOT a new feature in Word 2013?
 - A. Backstage view
 - B. Improved picture editing
 - C. The Ribbon
 - D. Paste with Live Preview
3. Where can you find basic file management commands and program options?
 - A. Status bar
 - B. Title bar
 - C. Close button
 - D. File tab
4. The Ribbon can be hidden so that only tab names appear. (True or False?)
5. The File tab contains basic file commands. (True or False?)
6. What is the Quick Access Toolbar?
 - A. There are no toolbars in Word 2013.
 - B. What appears when you select text.
 - C. A customizable toolbar of common commands that appears above or below the Ribbon.
 - D. An extension of the Windows taskbar.
7. Which of the following is NOT a command keystroke shortcut in Word?
 - A. <Ctrl> + <O>
 - B. <Ctrl> + <Home>
 - C. <Ctrl> + <Alt> + <Delete>
 - D. <Ctrl> + <S>
8. You can only create a new document by launching the Word program. (True or False?)
9. To open a document, click the File tab and select _____.
 - A. Open.
 - B. Find.
 - C. Look in.
 - D. Search.
10. Print settings and print preview appear side by side in Backstage view. (True or False?)

11. When you save a document with a different name, the old document is deleted. (True or False?)
12. You can close a document which one of the following ways?
 - A. Press <Ctrl> + <C>.
 - B. Click and drag the document window to the Recycle Bin.
 - C. Click the document's Close button.
 - D. Press <Delete>.
13. What key can you press to get help in Word 2013?
 - A. <Esc>
 - B. <Ctrl> + <H>
 - C. <F1>
 - D. <F11>
14. Which of the following are ways to exit Word 2013? (Select all that apply.)
 - A. Click the File tab and click Exit Word.
 - B. Click the Microsoft Office Button and click Close Word.
 - C. If only one document is open, click the Close button on the title bar.
 - D. Click the Close button on the Quick Access Toolbar.

Quiz Answers

1. False. You must start Word 2013 to begin using it.
2. C. The Ribbon was introduced in Word 2007, so it is not new in Word 2013. It has been improved, however, so that it is possible to customize tabs and groups on the Ribbon.
3. D. The File tab contains basic file management commands—such as New, Open, Save, and Close—and program options.
4. True. Double-click a tab to hide the Ribbon, then click any tab to view commands once again.
5. True. The File tab contains basic file commands, similar to the File menu and Office Button of previous versions.
6. C. The Quick Access Toolbar is a customizable toolbar of common commands that appears above or Below the Ribbon.
7. D. <Ctrl> + <S>
8. False. It's true that a new document appears automatically when you open Word. However that is not the only way to create a new document.
9. A. Select Open and then navigate to the saved file you want to open.
10. True. In Backstage view, print settings appear alongside a preview of how the document will look when printed.
11. False. When you save a document with a different name, the original document remains intact with its original name.
12. C. Click the Close button or press <Ctrl> + <W> to close a document.
13. C. Press <F1> to access help in Word 2013.
14. A and C. Click the File tab and click Exit Word, or, if only one document is open, click the Close button on the title bar.

Getting Started with Documents

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When you work with Word, you are working with documents, whether they are letters, memos, or envelopes; any file that is created in Word is called a document. You can do many great things with a document, but before you get into some of the more fun tasks like formatting, you need to learn more basic tasks, like how to insert text and browse through a document.

This chapter will go through the most basic commands for working with text, such as inserting and deleting, selecting, and replacing text.

Using Exercise Files

Exercise files are provided so users can practice the topic(s) covered in each lesson. There are two ways you may use the exercise files:

- Open the exercise file for a lesson and perform the lesson exercise. Close the exercise file.
- Open the exercise file for a lesson and perform the lesson exercise. Keep the file open and perform the exercise for the following lesson and so on for the remainder of the chapter.

The exercises are written so that you may “build upon them”, meaning the exercises in a chapter can be performed in succession from the first lesson to the last.

Entering and Deleting Text

Inserting and deleting text is one of the most important tasks you need to learn how to do in Word.

Enter text

- Click the insertion point where you want to enter the text and then type the text you want to enter.

✔ **Tips:**

Use the Click and Type feature to enter text in a blank area of the document. Double-click a blank area of the document where you want to position your text and start typing.

☰ I Double-click near the left side of the page to align text to the left of the page.

I ☰ Double-click near the center of the page to center text over the page.

☰ I Double-click near the right side of the page to align text to the right of the page.

✔ **Tip:**

Press the **<Enter>** key to start a new paragraph or insert an empty line.

Delete text

- **To delete a single character:** Place the insertion point next to the text that you want to delete. Press the **<Delete>** key to delete text after, or to the right of, the insertion point. Press the **<Backspace>** key to delete text before, or to the left of, the insertion point.
- **To delete a block of text:** Select the text you want to delete and press **<Delete>** or **<Backspace>**.

Exercise

- **Exercise File:** None required.
- **Exercise:** Write a brief note or letter in a new document. Use the **<Backspace>** and **<Delete>** keys to correct errors or rewrite text.

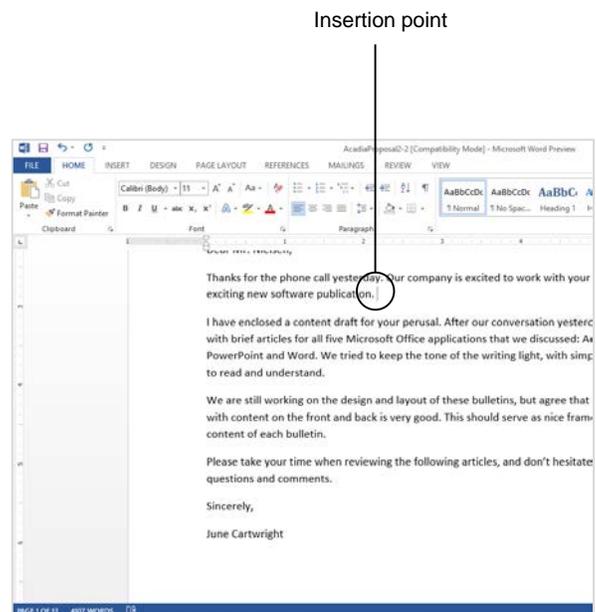


Figure 2-1: The insertion point and inserting text in a document.

Selecting and Replacing Text

The greatest advantage to using a word-processor is how easy it is to edit text throughout the document. A quick and easy way to edit text is by selecting text and replacing text.

Select text

Selecting text is a very important skill in Word. Whenever you want to work with text to edit or format it, you first need to select it.

1. Click the insertion point at the beginning or end of the text you want to select.

Selecting text is a useful skill because once text is selected, you can work with it by replacing, deleting, or formatting it.

2. Click and hold the left mouse button and drag the insertion point across the text. Release the mouse button once the text is selected.

Other Ways to Select Text:

- **Keystrokes:** Press and hold the <Shift> key while using the arrow keys to select characters (Right and Left arrow keys) or lines (Up and Down arrow keys).
- **Multiple blocks:** Select the first block of text and hold down the <Ctrl> key as you select the remaining block(s) of text.
- **Text with similar formatting:** This command selects any text that has the same formatting properties as text that is currently selected. Select the **HOME** tab, click **Select** in the Editing group and then click **Select Text with Similar Formatting (No Data)**. All text that is formatted exactly as the current text is selected.

Replace text

Replace text by first selecting it, then typing the new text.

Exercise

- **Exercise File:** AcadiaProposal2-2.docx
- **Exercise:** Replace June Cartwright’s contact information with your own name and contact information.



Figure 2-2: Selecting text.

Table 2-1: Text Selection Shortcuts

A word	Double-click the word.
Several bits of text	Select the first block of text, then press and hold <Ctrl> as you select the remaining blocks of text.
A sentence	Press and hold <Ctrl> and click anywhere in the sentence.
A line of text	Click in the selection bar next to the line.
A paragraph	Triple-click in the paragraph, or double-click in the selection bar next to the paragraph.
The entire document	Triple-click in the selection bar, or press and hold <Ctrl> and click anywhere in the selection bar, or press <Ctrl> + <A>, or click the Select button in the Editing group of the HOME tab in the Ribbon and select Select All.

Navigating through a Document

As a document gets longer, it gets harder and harder to navigate through it. For example, if you were working on a 200-page novel, how would you get to the very end of the document or to page 54? This lesson shows you several ways to navigate through your documents.

Scroll bars

The scroll bars are the most basic way to move between pages in a document. The vertical scroll bar is located along the right side of the window and is used to move up and down in a document. The horizontal scroll bar is located along the bottom of the window, and is used to move from left to right when a document doesn't fit entirely on the screen.

- When you click the arrow, the screen scrolls down one line at a time. Click and hold to move faster.
- Click and drag the scroll box to move in the document.

Navigation keystrokes

You can use keystrokes to move the insertion point in the document.

Table 2-2: Document Navigation Keystrokes

<Home>	To the start of the line.
<End>	To the end of the line.
<Page Up>	Up one screen.
<Page Down>	Down one screen.
<Ctrl> + <Home>	To the beginning of the document.
<Ctrl> + <End>	To the end of the document.

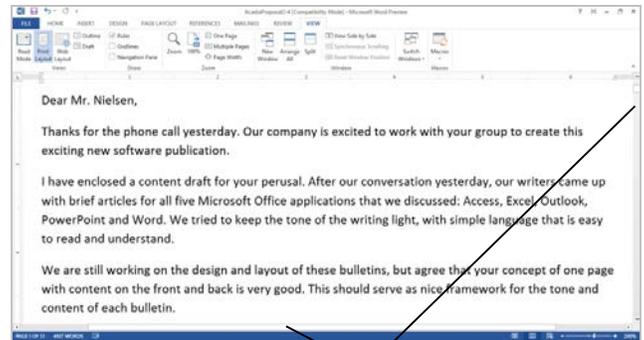
Go To

You can move directly to a certain location in the document using the Go To command.

1. Click the **HOME** tab on the Ribbon and click the **Find** button list arrow in the Editing group.
A list of options appears.
2. Select **Go To** from the list.
The Find and Replace dialog box appears.
 - **Other Ways to Open the Go To dialog box:**
Press <Ctrl> + <G>. Or, press <F5>.

Exercise

- **Exercise File:** AcadiaProposal2-3.docx
- **Exercise:** Use the Go To command to jump to page 10.
Use a keystroke shortcut to scroll up to page 8.
Use a keystroke shortcut to jump to the beginning of the document.
Use the vertical scroll bar to scroll to the end of the document.



Scroll bars

Figure 2-3: Use the scroll bars to navigate in a document.

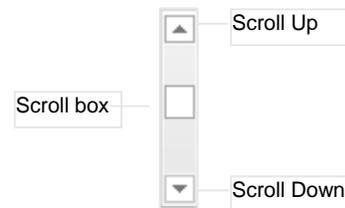


Figure 2-4: The parts of a scroll bar.

3. Enter the page number you wish to go to in the **Enter page number** text box and click **Go To**.

Word jumps to the specified page in the document.

- ✔ **Tip:** The Go To command can jump to more than just specific pages. For example, you can jump to a heading or footnote in the document. Just make your selection in the “Go to what” list and enter where you want to go in the text box.

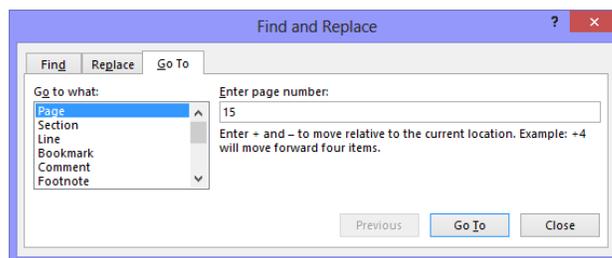


Figure 2-5: The Go To tab in the Find and Replace dialog box.

Browsing a Document

Scrolling through a long document can be confusing and time-consuming. Word 2013 includes some tools to make browsing longer documents easier.

Browse by object, graphic, table and more

Browsing by specific elements allows you to focus on aspects of a document as you navigate through it. For example, if you want to focus on how the images look in the document, select graphic from the Go to what: list to jump to each graphic in the document quickly.

1. Click the **Find** button list arrow in the Editing group and click **Go To**.

The Find and Replace dialog box appears.

2. Select the **Go To** tab, and click **Graphic** from the Go to what: list.
3. Click the **Previous** and **Next** buttons to navigate through the document.

Other Ways to Browse Back and Forth between Objects:

Press **<Ctrl> + <Page Up>** to go to the previous object. Press **<Ctrl> + <Page Down>** to go to the next object.

Browse by heading

The Navigation Pane makes it easy to get from one place to the next in a document using its headings.

1. Click the **VIEW** tab on the Ribbon and click the **Navigation Pane** check box in the Show group.

The Navigation Pane appears. Click the **HEADINGS** tab.

Other Ways to Open the Navigation Pane:

Press **<Ctrl> + <F>**. Or, click the **HOME** tab and click the **Find** button in the Editing group.

Trap: Headings will only appear in the Navigation pane, if you are viewing a document that uses heading styles.

2. Click a heading.

The heading is displayed in the main document window.

Browse by page

You can also view thumbnails of all the pages in your document in the Navigation Pane.

Exercise

- **Exercise File:** AcadiaProposal2-4.docx
- **Exercise:** Use the Go To button to find the Filter By Selection graphic.

Use the Navigation Pane to browse to the Outlook heading, then browse to page 7.

Close the Navigation Pane when you are done.

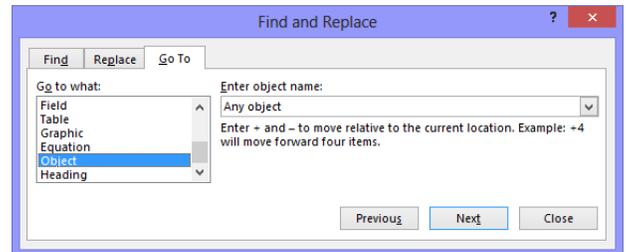


Figure 2-6: Use the Previous and Next Object buttons to navigate in the document.

Browse the headings in your document

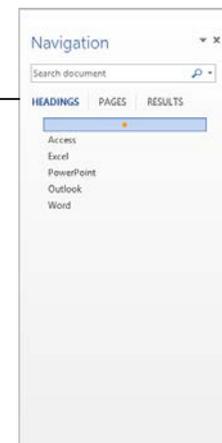


Figure 2-7: The “Browse the headings in your document” tab of the Navigation Pane.

1. Click the **VIEW** tab on the Ribbon and click the **Navigation Pane** check box in the Show group.

The Navigation Pane appears. Click the **PAGES** tab.

Other Ways to Open the Navigation Pane:

Press **<Ctrl> + <F>**. Or, click the **HOME** tab and click the **Find** button in the Editing group.

2. You can scroll through the document's thumbnails and click on one to go to it.

Tip:

Hover your mouse over the Navigation pane to access the scroll bar.



Figure 2-8: The Browse the pages in your document tab of the Navigation Pane.

Viewing a Document

There are several ways to change how a document's contents are displayed on a screen using Document views. You can also zoom in or out to view more or less of the page at a time, and display hidden document content.

Document views

- Click the **VIEW** tab on the Ribbon and click the button of the view you want to use in the Views group.

The document's contents are shown in the selected view.

- **Other Ways to Change Document View:** Click the button for the view you want to use in the status bar of the document window.

Word offers several different document views:

- **Print Layout view:** This view displays your document as it will appear when printed and is best for working in documents with images. Print Layout view uses more memory and can be slower on older computers.
- **Read Mode:** This view is optimized for reading on a portable device, such as a tablet or smart phone. Only necessary toolbars appear, making room for enlarged text and navigational tools.
- **Web Layout view:** Use Web Layout view when you are creating a Web page or a document that is viewed on the Web. In Web Layout view, you can see backgrounds, text is wrapped to fit inside the window, and graphics are positioned just as they are in a Web browser.
- **Outline view:** Displays your document in classic outline form. Work in Outline view when you need to organize and develop the content of your document.
- **Draft view:** This view is good for most simple word-processing tasks, such as typing, editing, and formatting. This view does not display advanced formatting, such as page boundaries, headers and footers, or floating pictures.

Zoom

Sometimes it is helpful to make a document appear larger on the computer's screen, especially if you have a small monitor or poor eyesight. It can also be helpful to zoom out so that you can see how the whole document looks.

Exercise

- **Exercise File:** AcadiaProposal2-5.docx
- **Exercise:** View the document in Word's different views. Zoom in to 200 percent, zoom out to 75 percent, then zoom to two pages. Display the document's hidden characters and hide them again.



Figure 2-9: The Views group on the VIEW tab on the Ribbon.

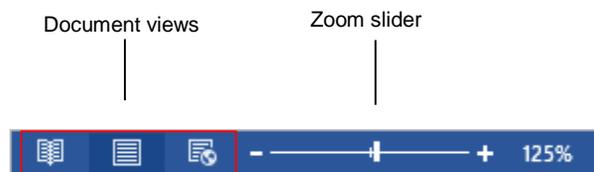


Figure 2-10: Document views and zoom on the status bar.

- Click and drag the **Zoom slider** on the status bar to the percentage zoom setting you want.
 - **Other Ways to Zoom:**
Click the **VIEW** tab on the Ribbon and click the **Zoom** button in the Zoom group. Or, click the **One Page, Multiple Pages**, or **Page Width** buttons in the Zoom group.

Display and hide hidden characters

Sometimes it is useful to see characters that are normally hidden, such as spaces, tabs, and returns.

1. Click the **HOME** tab on the Ribbon
2. Click the **Show/Hide** button  in the Paragraph group.

- **Other Ways to Display or Hide Hidden Characters:**

Press **<Ctrl> + <*>**.

The hidden characters, or characters that normally don't print, appear in the document. Paragraph marks appear as ¶'s, tabs appear as →'s, and spaces appear as ·'s.

Notice the Show/Hide button on the Standard toolbar is highlighted orange, indicating that all the hidden characters in the document are visible.



Figure 2-11: The Paragraph group.

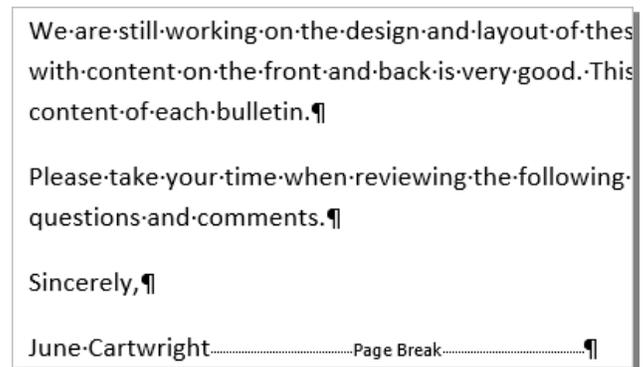


Figure 2-12: Displaying hidden characters.

Working with the Document Window

Each document you open in Word has its own window. This window has its own features you can use to change how you work with the document on your Windows desktop.

Change window size

You can change the size of the windows to organize the space on your screen better.

- **Maximize/Restore Down:** When the document window is at its full size, this button appears as the **Restore Down** button. When the window appears in a smaller size, the button appears as the **Maximize** button.
- **Minimize a Window:** Click the **Minimize** button on the title bar.
- **Other ways to change Window Size:** Click the **Word** Button on the Quick Access Toolbar and select an option from the list provided.
- **Resize a Window:** Click and drag the **resize control** in the lower-right corner of the window.

Split the document window

Splitting the document window is a great way to view two parts of one document at the same time. When the window is split, you can make changes to the document as you would normally.

1. Click the **VIEW** tab on the Ribbon and click the **Split** button in the Window group.
A gray shaded line appears in the document window with a cursor.
 2. Click where you want to split the document window.
The document window is split into two panes. Now you can scroll up and down in each pane to view different parts of the document at the same time.
- **Other Ways to Split the Window:**
Place your cursor on the line above the View Ruler button on the vertical scroll bar. When the cursor changes to , click and drag down to split the window in two.

When you no longer want the window to be split, remove the split.

3. Click the **VIEW** tab on the Ribbon and click the **Remove Split** button in the Window group.
The window is no longer split.

Exercise

- **Exercise File:** AcadiaProposal2-6.docx
- **Exercise:** Minimize, maximize, restore down and resize the document window.
Split the window and view the document in a new window.

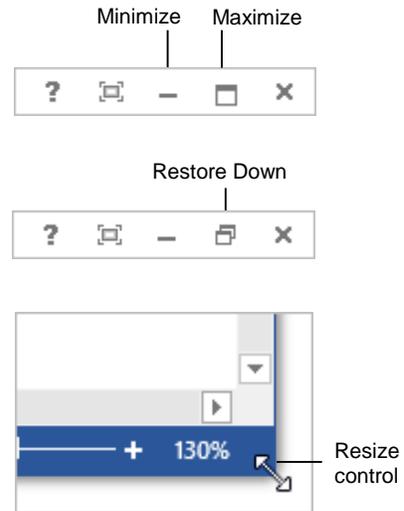


Figure 2-13: Changing window size.

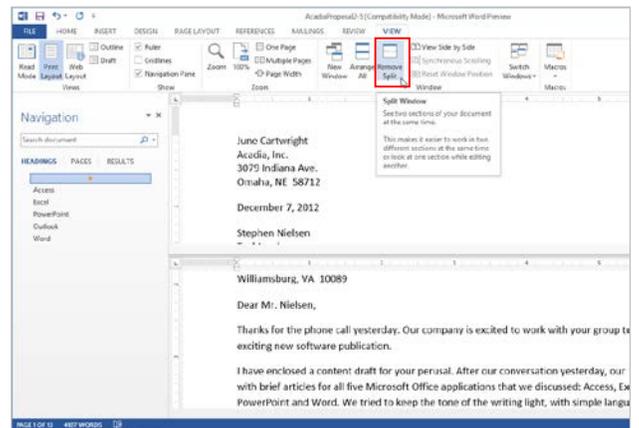


Figure 2-14: Split document window.

- 🔗 **Other Ways to Remove a Document Split:**
Click and drag the split line to the top or bottom of the document area.

✔ **Tip:** The window can only be split into two panes.

Create a new document window

You can view a document in one or more windows at a time.

- Click the **VIEW** tab on the Ribbon and click the **New Window** button in the Window group.

Another window opens with the document's contents.

✔ **Tips:**

- ✔ Viewing a document in multiple windows does not create a new file. Any changes made in one of the document windows are applied to the same file.
- ✔ Each instance of a document window is marked in the title bar. For example, if a new window was opened for Document 1, the two document windows would be named Document 1:1 and Document 1:2.
- ✔ When a change is made to the document in one window, the change is reflected in all the windows for the document.

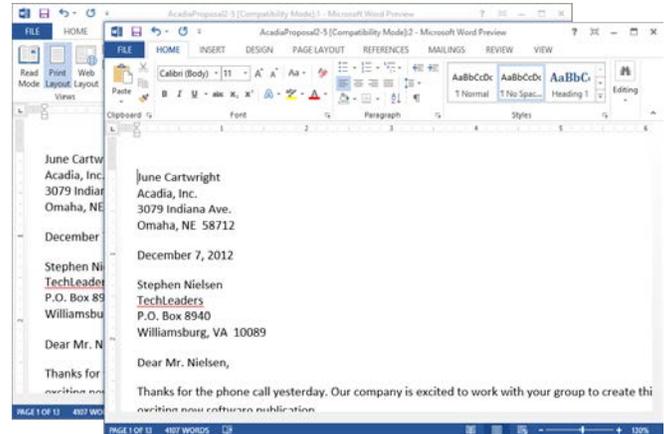


Figure 2-15: A document open in two document windows.

Viewing Multiple Document Windows

Since each document has its own window, you can work with the windows and view several document windows at the same time.

Switch between document windows

If you have several documents open in Word, you can switch between them while still having them open.

1. Point to the **Word** icon on the Windows taskbar. A preview of all open document windows appear.

2. Click the document window you wish to view. The selected document window becomes the active document.

- 🔍 **Other Ways to Switch to Another Document Window:**
Click the **VIEW** tab on the Ribbon and click the **Switch Windows** button in the Window group. Select the document you want to view.

Tip:

- ✓ When a document window is active, it is currently open to be worked on. When a document window is hidden but still open, it is inactive.

Arrange document windows

Use this command to arrange all open document windows so they can be viewed on the desktop.

- Click the **VIEW** tab on the Ribbon and click the **Arrange All** button in the Window group. The document windows are tiled on top of each other, stacked horizontally, so that they can be viewed at the same time, but as separate windows.

Tips:

- ✓ This command arranges all document windows that are currently open. The number of document windows that can be arranged on the screen at one time depends on your screen resolution. A higher screen resolution can accommodate more windows.
- ✓ To view more of a document window's contents at a time, have as few documents open at a time as possible. Only open the documents that you need so you can view more of their contents at a time.

Exercise Notes

- **Exercise File:** AcadiaProposal2-7.docx and Access Article.docx
- **Exercise:** Make the AcadiaProposal2-7 document active, then make the Access Article document active. Arrange the document windows so you can see both of them. Compare the documents side by side.

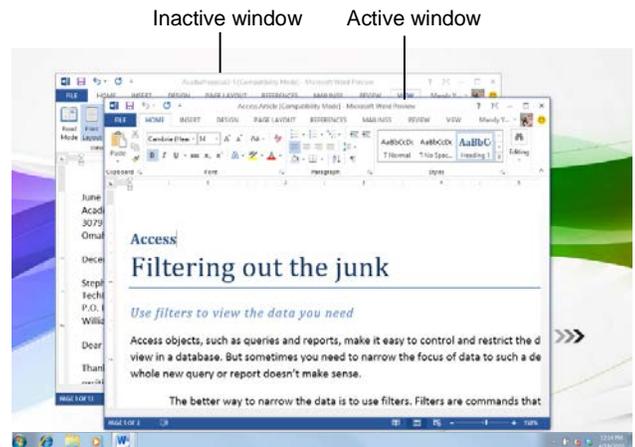


Figure 2-16: Two document windows open at once.

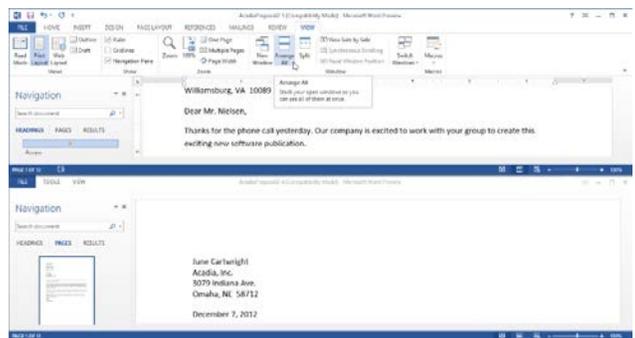


Figure 2-17: Two documents arranged using the Arrange All feature.

Compare documents side by side

If you need to compare the contents of documents to each other, one of the best ways to do this is to view them side by side.

Open the two documents you want to view side by side. The active document will be compared with another open document of your choice.

1. Click the **VIEW** tab and click the **View Side by Side** button in the Window group.

If only two documents are open, the documents are shown side by side.

! Trap: If more than two documents are open, the Compare Side by Side dialog box appears. Click the document you want to view alongside the active document and click **OK**.

Two controls are now available when documents are viewed side by side:

- **Synchronous Scrolling** is activated by default. This allows you to scroll down both windows at the same time.
- **Reset Window Position** adjusts the size of the windows so that they share the screen equally.

2. Click the **View Side by Side** button again, to return to the default view.

Only the active window is shown, while the other document remains open.

✓ Tip:

- ✓ This feature only works with two document windows.



Figure 2-18: The Window group.

Getting Started with Documents

Review

Quiz Questions

15. Which key deletes text to the left of the insertion point?
 - A. <Backspace>
 - B. <Home>
 - C. <Insert>
 - D. <Delete>

16. Once a block of text is selected, you can replace the selected text with new text by:
 - A. Clicking the File tab and selecting Insert New Text.
 - B. Simply typing the new text.
 - C. You can't replace selected text with new text.
 - D. Clicking the Replace Text button on the Ribbon.

17. Press _____ to move the insertion point to the beginning of the document.
 - A. <Ctrl> + <End>
 - B. <Ctrl> + <G>.
 - C. The <up arrow> key.
 - D. <Ctrl> + <Home>.

18. Which of these are NOT objects you can browse by in Word?
 - A. Page, Section, Edits
 - B. Caption, Border, Highlight
 - C. Comment, Footnote, Endnote
 - D. Table, Graphic, Heading, Field

19. Click a heading or page in the Navigation Pane to jump to that heading or page in the main document window. (True or False?)

20. How can you display hidden text, such as tabs and paragraph marks?
 - A. Click the Show/Hide button in the Paragraph group of the Home tab on the Ribbon.
 - B. You can't display these characters: they are hidden for a reason.
 - C. Purchase Microsoft's secret hidden text decoder software.
 - D. Click the Hidden Text button in the Editing group of the Home tab on the Ribbon.

21. You can use the Zoom slider to change the magnification level of a document. (True or False?)

22. When you create a new document window, you create a copy of the document. (True or False?)

23. How do you switch between multiple document windows?
 - A. Right-click the Windows taskbar and select Arrange All.

- B. Buy another monitor for your computer.
 - C. You can only open one document at a time in Microsoft Word.
 - D. Click the document's button on the Windows taskbar.
24. When documents are compared side by side, the differences between the two are tracked and highlighted. (True or False?)

Quiz Answers

- 1.
2. A. The <Backspace> key deletes text to the left of the insertion point.
3. B. Simply type the new text to replace any amount of selected text.
4. D. Pressing <Ctrl> + <Home> moves the insertion point to the beginning of the document.
5. B. You cannot browse by Caption, Border, Highlight in Word.
6. True. You can click a heading or a page in the Navigation Pane to jump to that heading or page in the main document window.
7. A. Click the Show/Hide button on the Ribbon to display hidden text.
8. True. The Zoom slider on the status bar lets you zoom in and out of a document.
9. False. Creating a new document window is like opening the document in a different view: if a document is open in multiple windows, changes made in any of the windows are applied to the same file.
10. D. Click the document's button on the Windows taskbar. Or, in the View tab, click the Switch Windows button in the Windows group.
11. False. When documents are compared side by side, they are aligned vertically to one another. The differences between them are not highlighted or tracked.

Working With and Editing Text

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Word can do a lot of things, but its primary function is to be a word processor: it can help you out with anything that has to do with words. It's also the most popular program for creating letters, memos, reports, outlines—any document that is primarily focused on producing text.

Since text is the primary function and purpose of Word, this chapter deals with how to work with text when you insert and edit it in the document.

Using Exercise Files

Exercise files are provided so users can practice the topic(s) covered in each lesson. There are two ways you may use the exercise files:

- Open the exercise file for a lesson and perform the lesson exercise. Close the exercise file.
- Open the exercise file for a lesson and perform the lesson exercise. Keep the file open and perform the exercise for the following lesson and so on for the remainder of the chapter.

The exercises are written so that you may “build upon them”, meaning the exercises in a chapter can be performed in succession from the first lesson to the last.

Checking Spelling and Grammar

Part of editing your documents is making sure that everything is spelled and put together correctly. Word is a great help in this regard, because it can identify spelling and grammar errors in your documents.

Check spelling and grammar in the document

To check the spelling and grammar of a document all at once, use the Spelling and Grammar dialog box.

1. Click the **REVIEW** tab on the Ribbon and click the **Spelling & Grammar** button in the Proofing group.

Word begins checking spelling and grammar from the location of the insertion point.

- **Other Ways to Check Spelling and Grammar:**
Press <F7>.

If Word finds an error, the Spelling and Grammar Pane appears with the error in the text box at the top of the dialog box. See **Table 3-1: Spelling and Grammar Options** for more information about the different options in the dialog box.

2. If the word or grammar is incorrect, select the correction from the Suggestions list, or type your own correction in the top text box. Then click **Change** or **Change All**. If the word or grammar is correct, click **Ignore Once**, **Ignore All**, **Next Sentence**, or **Add to Dictionary**.

Word applies the command and continues to the next error.

Once Word has finished checking your document for spelling and grammar errors, a dialog box appears.

3. Click **Yes** to complete the check.

✔ Tips:

- ✔ You can turn off spell and grammar checker. Click the **FILE** tab and click **Options**. Click the **Proofing** tab. Click the **Check spelling as you type** check box and/or the **Mark grammar errors** as you type check box. Click **OK**.
- ✔ Word cannot catch spelling errors that occur because of misuse. For example, if you entered the word "through" when you meant to type "threw," Word wouldn't catch it because both are correctly spelt.

📖 Exercise Notes

- **Exercise File:** CompanyMeeting3-1.docx
- **Exercise:** Correct the spelling and grammar errors in the document.

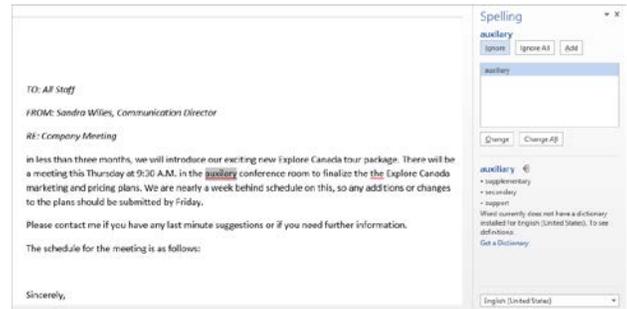


Figure 3-1: The Spelling and Grammar Pane, as it appears when checking a spelling error.

Table 3-1: Spelling and Grammar Options

Ignore Once	Accepts the spelling or grammar you used.
Ignore All or Ignore Rule	Accepts the spelling or grammar you used and ignores all future occurrences in the document.
Next Sentence	Skips the grammar error and goes on to the next one.
Add to the Dictionary	If a word is not recognized in the Microsoft Office Dictionary, it is marked as misspelled. This command adds the word to the dictionary so it is recognized in the future.
Change	Changes the spelling of the word to the spelling that is selected in the Suggestions list.
Change All	Changes all occurrences of the word in the document to the selected spelling. Exercise caution when using this command; you might end up changing something you didn't want to change.

Correct a single error

By default, Word checks for spelling and grammar errors as you type, underlining misspelled words in red and grammar errors in blue. This makes it easy to find and correct errors individually.

1. Right-click the error.

A contextual menu appears, suggesting possible corrections.

2. Select a correction from the contextual menu.

Word corrects the error, and the red or blue underline disappears.

- ✔ **Tip:** If something is underlined in red or blue but you know it is correct, you can get rid of the underline by selecting **Ignore**, **Ignore All**, or **Add to Dictionary** from the contextual menu.

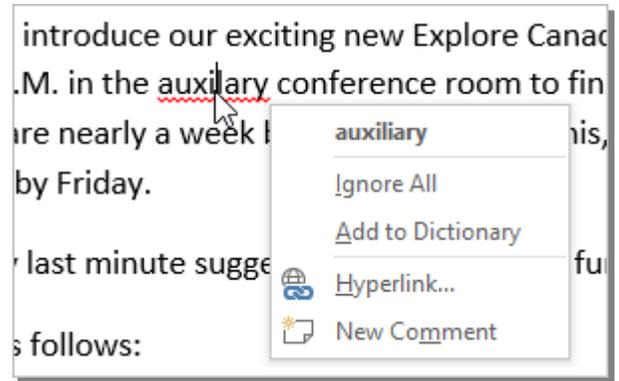


Figure 3-2: Correcting a single error by right-clicking it.

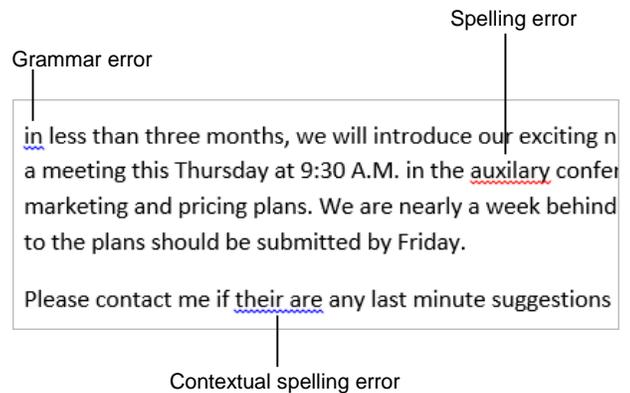


Figure 3-3: Spelling and Grammar check.

Finding Text

The Navigation Pane is a new feature in Word 2013 that can help you quickly find specific text in a document. You can also access the Find and Replace dialog box from the Navigation Pane if you prefer to use that.

Find text

Use the Navigation Pane to browse, view, and search a document.

1. Click the **HOME** tab on the Ribbon and click the **Find** button in the Editing group.

The Navigation Pane appears.

Other Ways to Find Text:

Press **<Ctrl> + <F>**. Or, click the **VIEW** tab and click the **Navigation Pane** check box in the Show group.

2. Click the **Search document** text box and enter the text you want to find.

The Navigation Pane is populated with items that match your search

See **Table 3-2: Navigation Pane Tabs**, for explanations on each tab of the Navigation Pane.

3. Click a result to navigate to it.

The result appears in the main document window.

Other Ways to Navigate to a Result:

Click the **Previous Search Result** or **Next Search Result** button to navigate through the document.

4. When you're done, click the **Close** button.

The Navigation Pane closes.

Open the Find and Replace dialog box

You can also use the Find and Replace dialog box to find and/or replace text.

1. Click the **HOME** tab on the Ribbon and click the **Replace** button in the Editing group.

The Find and Replace Dialog box appears.

Other Ways to Open the Find and Replace Dialog box:

Press **<Ctrl> + <G>** and click the **Find** tab.

Exercise

- **Exercise File:** CompanyMeeting3-2.docx
- **Exercise:** Find all instances of the word "Explore" in the document.

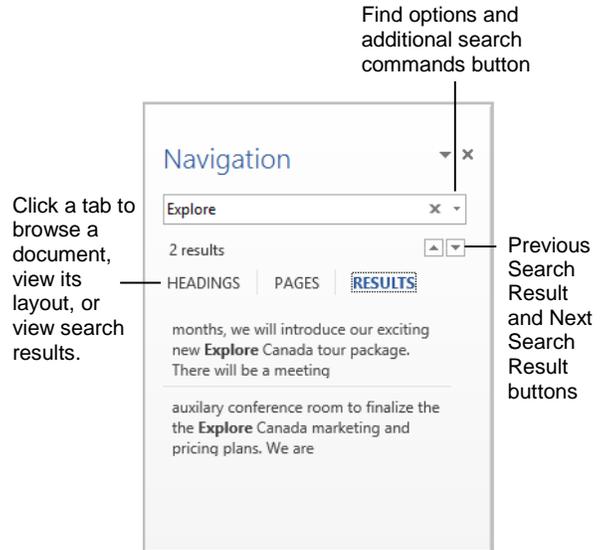


Figure 3-4: Your search results are highlighted in the document and are displayed in the Navigation Pane.

Table 3-2: Navigation Pane Tabs

HEADINGS	Browse the headings in your document
PAGES	Browse the pages in your document
RESULTS	Browse the results of your current search

2. Click the **Find** tab and enter the text you want to find or replace in the Find what: text box.
3. (Optional) Choose what you want to do with text that matches your find request:
 - **Reading Highlight**
Click the button to select “Highlight All”, which highlights each instance of the word or phrase in the document.
 - **Find in options**
Current Selection: Search for the text within the currently selected text.
Main Document: Search for the text throughout the main document.
Comments: Search for the text within comment balloons inserted in the document.
 - **Find Next**
Search through the document one item at a time.
5. When you’re finished, click **Cancel** to close the Find & Replace Dialog box.

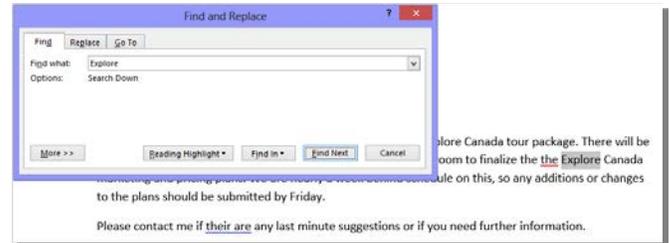


Figure 3-5: Using the Reading Highlight feature.

Replacing Text

Don't waste time scanning through your document to find text and replace it with something new: Word's Replace command can do this for you with just a few clicks of your mouse.

Replace text

Replace finds specific words and phrases, and then replaces them with something else.

1. Click the **HOME** tab on the Ribbon and click the **Replace** button in the Editing group.

The Replace tab of the Find and Replace dialog box appears.

Other Ways to Open the Find and Replace Dialog box:

Press **<Ctrl> + <H>**.

2. Click the **Find what:** text box and enter the text you want to replace.
3. Click the **Replace with:** text box and enter the replacement text.
4. Click **Find Next**.

The first occurrence of the "Find what" text is highlighted.

5. Choose how you want to replace the text:

- **Replace:** Click to replace the current item.
- **Replace All:** Click to replace each item found in the document. Use this command with caution: you might replace something you didn't want to replace.

Search options

Use Word's search options to change how Word searches in the document.

- Click the **More** button on the Find and Replace dialog box to specify how to search for text.

Table 3-2: Find and Replace Search Options below describes the Search Options available under the Find and Replace tabs.

- ! Trap:** If you specify Search Options, make sure to turn them off when you are finished. Otherwise, subsequent find or replace commands will use the same search options.

Exercise

- **Exercise File:** CompanyMeeting3-3.docx
- **Exercise:** Replace all instances of the word "Explore" with "Travel".

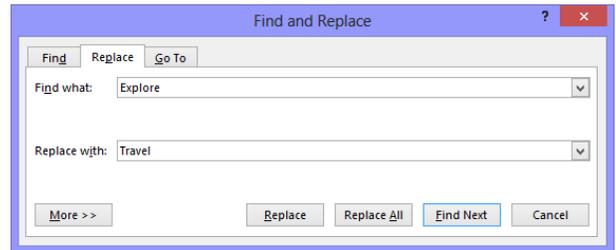


Figure 3-6: The Replace tab of the Find and Replace dialog box.

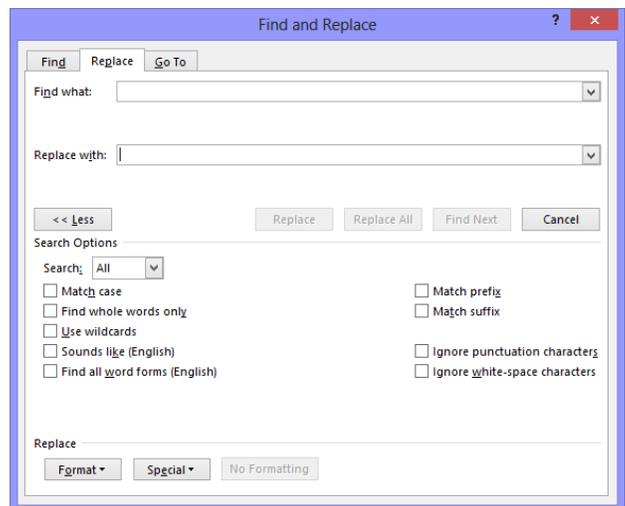


Figure 3-7: The Find and Replace dialog box with the Replace tab displayed.

Table 3-3: Find and Replace Search Options

Search	Choose whether to search up, down, or the entire document from the current location.
Match case	Search only for text that matches the capitalization entered.
Find whole words only	For example, if you're looking for "son", selecting this option will skip over words that contain "son", such as Hanson, lesson, or sonic.
Use wildcards	Search for wildcards, special characters, or special search operators as added in the "Find what" box. To add wildcards, click Special and select the item, or type the item. If this check box is cleared, Word considers the wildcards and operators to be plain text.
Sounds like (English)	Words that sound the same as the "Find what" text, but are spelled differently.
Find all word forms (English)	Searches for all forms of the word.
Match prefix	Searches for the text in the "Find what" box at the beginning of the word.
Match suffix	Searches for the text in the "Find what" box at the end of the word.
Ignore punctuation characters	Does not account for punctuation when searching for entered text.
Ignore white-space characters	Does not account for characters that add white space, such as spaces or empty paragraph marks.
Format button	Specify formatting characteristics you want to find attached to the text in the Find what text box.
Special button	Allows you to search by special characters such as Paragraph marks or Em-dashes. Inserts special characters in the "Find what" or "Replace with" boxes.

Using Word Count and the Thesaurus

Two other tools that are useful in working with text are Word Count and Thesaurus.

Word Count

The Word Count feature counts all the words in your document. This is useful if you have a writing assignment that is limited to a number of words, such as a 600-word report.

- Click the **REVIEW** tab on the Ribbon and click the **Word Count** button in the Proofing group.

The Word Count dialog box appears, displaying document information. This includes the number of words, pages, characters, paragraphs and lines.

✓ Tips:

- ✓ By default, the number of words in a document appears in the status bar.
- ✓ To specify word count to certain areas of the document, select the text you want to include in the count. The number of selected words appears in the status bar. Press the **<Ctrl>** key to select non-adjacent text.

Thesaurus

Use Word’s built-in Thesaurus to help you find synonyms for a word. For example, you can use the Thesaurus to replace the ho-hum word “good” with one of its synonyms, such as “commendable,” “capital,” or “exemplary.”

- Select the word for which you want to find a synonym.
- Click the **REVIEW** tab on the Ribbon and click the **Thesaurus** button in the Proofing group.

The Thesaurus task pane appears.

- **Other Ways to Open the Thesaurus:**
Right-click a word, point to **Synonyms**, and select **Thesaurus**. Or, press **<Shift> + <F7>**.

- Point to the synonym you want to use. Click its list arrow and select **Insert**.

- **Other Ways to Replace a Word with a Synonym:**
Right-click the word for which you want to find a synonym. Point to **Synonyms** in the contextual menu and select a synonym from the list.

📖 Exercise Notes

- **Exercise File:** CompanyMeeting3-4.docx
- **Exercise:** View the Word Count dialog box.
Replace the word “exciting” in the first sentence of the memo with a synonym from the thesaurus.

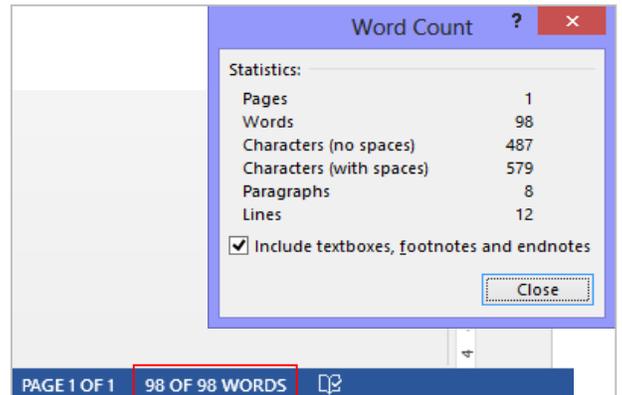


Figure 3-8: The Word Count dialog box.

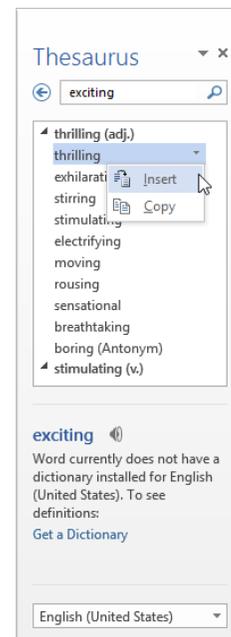


Figure 3-9: Using the thesaurus in the Research task pane.

Inserting Symbols and Special Characters

Your keyboard doesn't contain all the characters you might want to include in your documents. Word lets you insert these special symbols and characters, and even equations, separately.

Insert symbols

You can enter many more characters and symbols in a document than can be found on the keyboard. For example, you can insert the copyright symbol (©), accented and foreign characters (ç), silly characters (☺), and many more.

1. Place the insertion point where you want to insert the symbol or character.

2. Click the **INSERT** tab on the Ribbon and click the **Symbol** button drop arrow in the Symbols group.

If you see the symbol you want to use under the Symbol button, select it. Otherwise, open the Symbol dialog box.

3. Click **More Symbols**.

The Symbol dialog box appears. You can browse the different symbols by changing the Font and Subset of symbols. Special characters such as ellipses are available under the Special Characters tab.

4. Select the symbol you want to use and click **Insert**.

The symbol is inserted into the document.

Insert an equation

You may insert a common equation already put together in Word, such as the Area of a Circle, or $A = \pi r^2$, or build a new equation using the EQUATION TOOLS tab.

1. Click the **INSERT** tab on the Ribbon and click the **Equation** button in the Symbols group.

A placeholder for the equation appears in the document, and the EQUATION TOOLS tab appears on the Ribbon.

Tip: To insert a built-in equation, click the **Equation** button list arrow and select an equation from the gallery.

2. Type the equation in the placeholder.

You may use the keyboard and the EQUATION TOOLS on the Ribbon to write the equation.

Exercise

- **Exercise File:** CompanyMeeting3-5.docx
- **Exercise:** Insert the copyright symbol after the two instances of "Travel Canada" in the document.

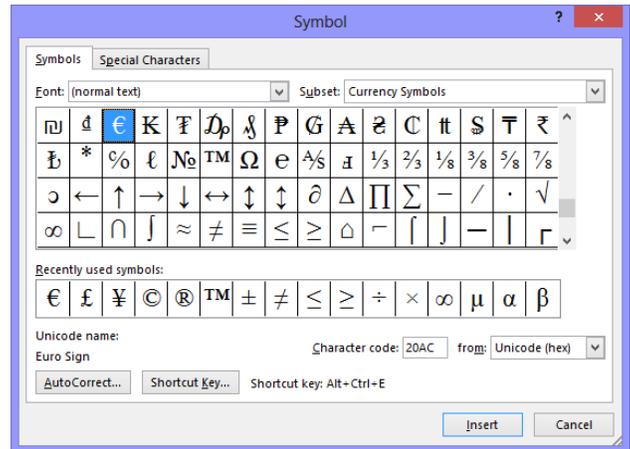


Figure 3-10: The Symbol dialog box.



Figure 3-11: Inserting an equation.

Copying and Moving Text

You can move or copy text in a Word document by copying or cutting, and then pasting the text in a new place. .

✓ Tips:

- ✓ You may cut, copy, and paste any item in a document, such as clip art, a table, or an AutoShape—not just text.
- ✓ You may copy, cut, and paste text within a document or between documents.

Copy text

When you copy text, the selected text remains in its original location and is added to the Clipboard.

1. Select the text you want to copy.
2. Click the **HOME** tab on the Ribbon and click the **Copy** button in the Clipboard group.

The text is added to the Clipboard, and it remains in the document.

🔍 Other Ways to Copy Cells:

Press **<Ctrl> + <C>**. Or, right-click the selection and select **Copy** from the contextual menu.

3. Place the insertion point where you want to paste the copied content.

The text will be inserted to the right of the insertion point.

4. Click the **HOME** tab on the Ribbon and click the **Paste** button in the Clipboard group.

The copied text is pasted in the new location.

🔍 Other Ways to Paste Cells:

Press **<Ctrl> + <V>**. Or, right-click where you want to paste and select **Paste** from the contextual menu.

Move text

Moving text typically involves a process of cutting and pasting. When you cut text, it is removed from its original location and placed in a temporary storage area called the Clipboard.

📖 Exercise Notes

- **Exercise File:** CompanyMeeting3-6.docx and Meeting Schedule1.docx
- **Exercise:** In the Meeting Schedule1.docx document, copy the “An overhead display will be available” sentence. Paste the text after the schedule in the CompanyMeeting3-6 document.

In the Meeting Schedule1.docx document, cut the four lines of the schedule, beginning with “President’s introduction, 9:30” and ending with “11:45”. Paste the text below “The schedule for the meeting is as follows” in the CompanyMeeting3-6 document.

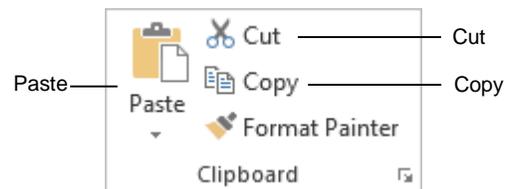


Figure 3-12: The Clipboard group.

1. Select the text you want to move.
2. Click the **HOME** tab on the Ribbon and click the **Cut** button in the Clipboard group.

The text is removed from the document and added to the Clipboard.

 **Other Ways to Cut Cells:**

Press **<Ctrl> + <X>**. Or, right-click the selection and select **Cut** from the contextual menu.

3. Place the insertion point where you want to paste the copied content.

The text will be inserted to the right of the insertion point.

4. Click the **HOME** tab on the Ribbon and click the **Paste** button in the Clipboard group.

The copied text is pasted in the new location.

 **Other Ways to Paste Cells:**

Press **<Ctrl> + <V>**. Or, right-click where you want to paste and select **Paste** from the contextual menu.

Copy and move text using the mouse

Using the mouse to move and copy cells is even faster and more convenient than using the cut, copy, and paste commands.

1. Select the text you want to move.
2. Point to the selected text.
3. Click and hold the mouse button.
4. Drag the pointer to where you want to move the selected text and then release the mouse button.

 **Tip:**

- ✓ Press and hold the **<Ctrl>** key while clicking and dragging to copy the selection.

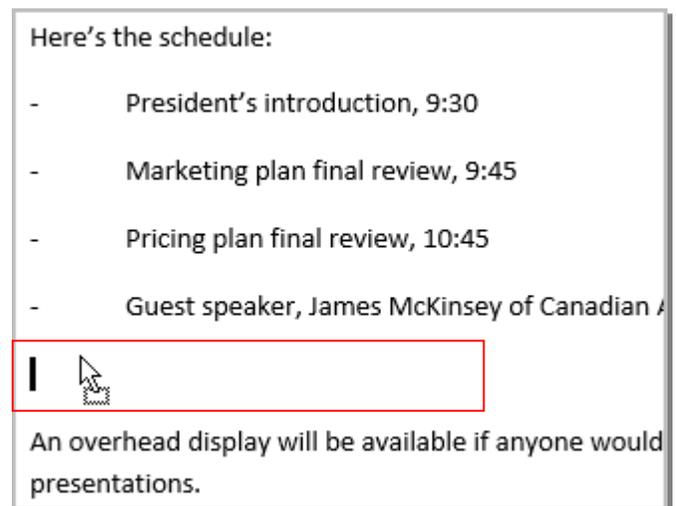


Figure 3-13: Moving text using the mouse.

Controlling How Text is Copied or Moved

You can control how text looks or behaves when it is pasted. For example, you can keep the text’s formatting, or have it take on the formatting properties of the destination.

Use paste options

You can control how content is pasted in your spreadsheets using the paste options in Word.

1. Copy or cut an item as you normally would.
2. Click where you want to paste the item.
3. Right-click and look at the Paste Options on the contextual menu. You will see different ways you can paste the content.

 **Other Ways to Use Paste Options:**

Before pasting, click the **Paste** button list arrow in the Clipboard group on the HOME tab and select a paste option from the list.

 **Tip:** The options available depend on the type of content being pasted.

5. Point to a paste option.
A live preview of how the content will look using that paste option appears.
6. Click a paste option.
The text is pasted using the selected option.

Use Paste Special

You can further control how content is pasted using the Paste Special command.

1. Copy or cut an item as you normally would.
2. Click where you want to paste the item.

Exercise Notes

- **Exercise File:** CompanyMeeting3-7.docx.
- **Exercise:** Move the text “Thursday” so that it follows the sentence that begins “RE: Company Meeting”. Make sure the text “Thursday” has the same formatting as the destination text.

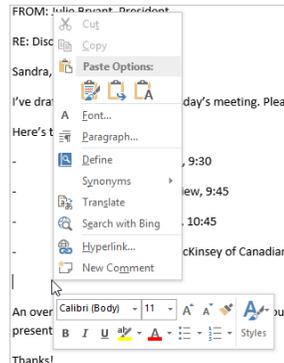


Figure 3-14: The Paste Options button appears after pasting. Click this button to specify how data is pasted into your worksheet.

Table 3-4: Word Paste Options

 Paste	Paste using default settings.
 Keep Source Formatting	Paste using the formatting of the original text.
 Use Destination Theme	Paste using the formatting of the destination text.
 Merge Formatting	Paste using the formatting of the majority of the text.
 Keep Source Formatting	Paste using the formatting of the original text.

3. Click the **HOME** tab and click the **Paste** button list arrow in the Clipboard group.
4. Select **Paste Special**.

The Paste Special dialog box appears. The options in the Paste Special dialog box depends on the type of content being pasted.

 **Other Ways to Open Paste Special:**
Press **<Ctrl> + <Alt> + <V>**.

5. Select a paste option and click **OK**.

The content is pasted into the document using the selected option.

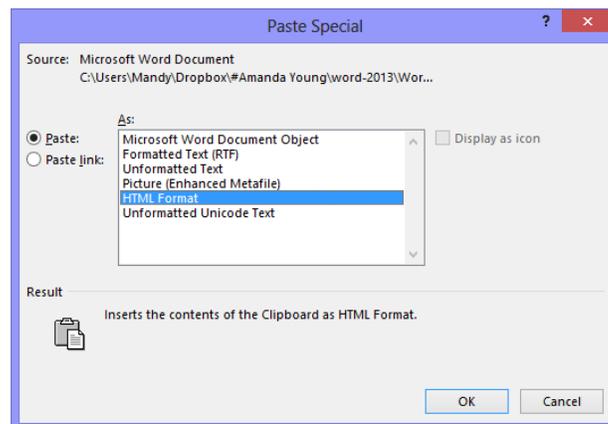


Figure 3-15: The Paste Special dialog box.

Collecting Multiple Items to Move or Copy

If you do a lot of cutting, copying, and pasting you will appreciate the Office Clipboard. The Clipboard lets you collect multiple cut or copied items at a time, which you can then paste as needed. You can even use it to collect and paste items from other Office programs.

1. Click the **HOME** tab on the Ribbon and click the **Dialog Box Launcher** in the Clipboard group.

The Clipboard task pane appears along the left side of the window.

2. Cut and copy items as you normally would.

The Clipboard can hold 24 items at a time. The icon next to each item indicates the program the item is from. See **Table 3-4: Icons in the Clipboard Task Pane**, for examples of some common icons.

3. Click where you want to paste an item from the Clipboard.
4. Click the item in the Clipboard.

✓ Tips:

- ✓ While the Clipboard is displayed, each cut or copied item is saved to the Clipboard. If the Clipboard is not displayed, only the last cut or copied item is replaced.
- ✓ As long as the Clipboard is open, it collects items that are cut or copied from all Office programs.
- ✓ To remove an item from the Clipboard, click the item's list arrow and select **Delete**. Click the **Clear All** button in the task pane to remove all items from the Clipboard.
- ✓ Click the **Options** button near the bottom of the task pane to control how the Clipboard operates.

Copied and cut items appear in the Clipboard task pane.

Exercise Notes

- **Exercise File:** CompanyMeeting3-8.docx and MeetingSchedule2.docx
- **Exercise:** Using the Clipboard, copy the “Breakfast, 8:00” line and the “Luncheon, 12:00” line items in the MeetingSchedule2.docx and paste both items in the CompanyMeeting3-8 document, with “Breakfast” at the beginning of the schedule, and the “Luncheon” at the end of the schedule.

Table 3-5: Icons in the Clipboard Task Pane

	Content cut or copied from a Microsoft Excel workbook.
	Content cut or copied from a Microsoft PowerPoint presentation.
	Content cut or copied from a Microsoft Word document.
	Web page contents cut or copied from a Web browser.
	Cut or copied graphic object.
	Content cut or copied from a program other than Microsoft Office.

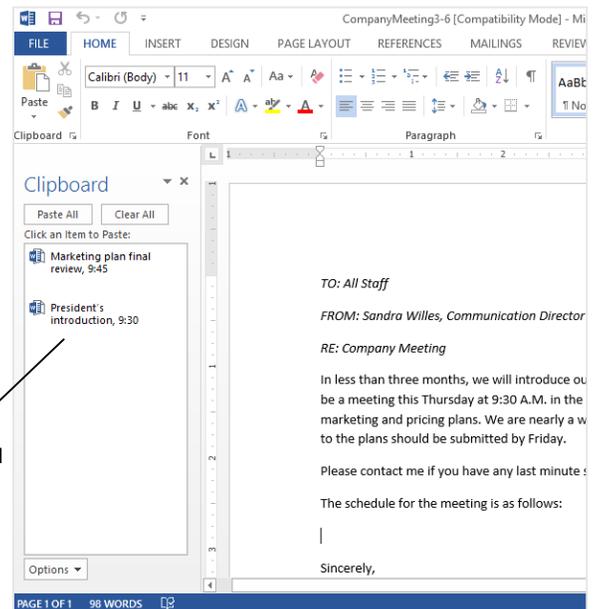


Figure 3-16: A document with the Clipboard task pane displayed.

Using Undo, Redo, and Repeat

You don't need to be afraid of making a mistake in Word because you can use the Undo feature to erase your actions. The undo, redo, and repeat commands are very useful for working with text in a document.

Undo a single action

Undo does just that—it undoes any actions as though they never happened.

- Click the **Undo** button on the Quick Access Toolbar.

Your last action is undone. For example, if you had deleted an item and then decided you wanted to keep it after all, undo would make it reappear.

- Other Ways to Undo:**
Press **<Ctrl> + <Z>**.

Undo multiple actions

- Click the **Undo** button list arrow on the Quick Access Toolbar.

A list of the last actions performed in Word appears. To undo multiple actions, point to the command you want to undo. For example, to undo the last three actions, point at the third action in the list. Each action done before the one you select is also undone.

- Tip:** You can undo up to 100 actions in Word, even after saving the document.

- Click the last action you want to undo in the list.

The command you select and all subsequent actions are undone.

Redo an action

Redo is the opposite of undo: it redoes an action you have undone. For example, if you decide that you do, after all, want to delete an item that you have just brought back with undo, you can redo the action.

- Click the **Redo** button on the Quick Access Toolbar.

- Other Ways to Redo an Action:**
Press **<Ctrl> + <Y>**.

- Tip:** Click the **Redo** button multiple times to redo multiple actions.

- Trap:** The Redo and Repeat buttons toggle between the two commands. Redo only appears when you've just used the Undo command. Once you've redone all the actions that were undone, the button changes back to the Repeat Typing button.

Exercise

- Exercise File:** CompanyMeeting3-9.docx
- Exercise:** Delete the text "TO: All Staff" and then undo the action.
Select, "TO", "FROM" and "RE" one by one and make them Bold. Undo the action for all three words.

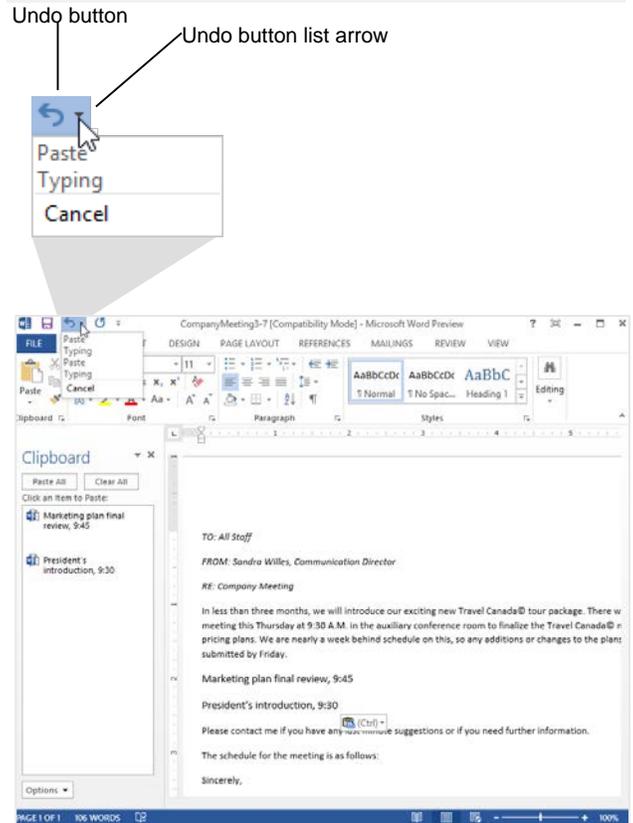


Figure 3-17: You can undo multiple actions by clicking the Undo button list arrow on the Quick Access Toolbar.

Repeat an action

Repeat is different from redo, because repeat applies the last command to any selected text. For example, rather than applying bold formatting by clicking the Bold button repeatedly, you can repeat the bold command with the Repeat button or keystroke.

- Click the **Repeat** button on the Quick Access Toolbar.
 - 👉 **Other Ways to Repeat a Command:**
Press <F4>.

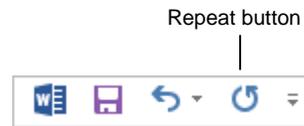


Figure 3-18: The Repeat button on the Quick Access Toolbar.

Working With and Editing Text

Review

Quiz Questions

- 1.
2. Word underlines spelling errors in red, and grammar errors in green. (True or False?)
3. You can change Word preferences so that errors are not underlined. (True or False?)
4. What should you do if a word is marked as misspelled, but is actually correct?
 - A. Click Change.
 - B. Click Ignore All.
 - C. Click Change All.
 - D. Nothing.
5. What is the keystroke shortcut to find text?
 - A. <Ctrl> + <H>
 - B. <F1>
 - C. There isn't a keystroke shortcut for this command.
 - D. <Ctrl> + <F>
6. Word's Replace command finds a string of text and replaces it with another string of text. (True or False?)
7. What is the fastest way to count the number of words in a document?
 - A. Click the Word Count button on the Ribbon.
 - B. Print out the document and count the words by hand.
 - C. Look at the Word Count area in the status bar.
 - D. Press <Shift> + <F7>.
8. You want to find a synonym for the word 'scary'. How could you do this?
 - A. Right-click the word 'scary' and select Synonyms from the contextual menu.
 - B. Select the word 'scary' then press <Ctrl> + <S>.
 - C. Right-click the word and select a spelling correction from the contextual menu.
 - D. Open the Find dialog box and enter the word you want to a synonym for and click Thesaurus.
9. How would you insert a © symbol in a document?
 - A. Click the Insert tab on the Ribbon and click the Symbol button in the Symbols group.
 - B. Press <Ctrl> + <C>.
 - C. Click the Copyright button on the Quick Access Toolbar.
 - D. Word cannot display the © symbol.

10. What are some examples of built-in equations you can insert in a document?
 - A. Area of a Circle
 - B. Pythagorean Theorem
 - C. Quadratic Formula
 - D. All of these.
11. To copy cells using the mouse, press and hold the _____ key while clicking and dragging the selection.
 - A. <Alt>
 - B. <Ctrl>
 - C. <Shift>
 - D. <F4>
12. The keyboard shortcut for cutting text is <Ctrl> + <C>. (True or False?)
13. Select the Use Destination Theme paste option if you want to paste text using the formatting of the destination text. (True or False?)
14. The Office Clipboard is available in other Office programs besides Word. (True or False?)
15. You can undo multiple actions in Word. (True or False?)

Quiz Answers

- 1.
2. True. Word underlines spelling errors in red and grammar errors in green.
3. True. You can turn off settings that underline spelling and grammar errors in Word.
4. B. Click Ignore All so that Word does not underline other instances of the word in the document. If the word is one you will use often, you can also add it to the dictionary.
5. D. <Ctrl> + <F> is the keystroke shortcut to find text.
6. True. Word's Replace command finds a string of text and replaces it with another string of text.
7. C. The fastest way to see the number of words in a document is to look at the Word Count area of the status bar.
8. A. Right-click the word 'scary' and select Synonyms from the contextual menu, then select a word from the Synonyms list.
9. A. To insert a symbol or special character, click the Insert tab on the Ribbon and click the Symbol button in the Symbols group.
10. D. These are just a few of the built-in equations you can insert into a document.
11. B. Press and hold the <Ctrl> key to copy cells using the mouse.
12. False. The keyboard shortcut for cutting text is <Ctrl> + <X>. <Ctrl> + <C> copies text.
13. True. The Use Destination Theme option lets you paste text using the formatting of the destination text.
14. True. The Office Clipboard can be used in all Office programs.
15. True. You can undo multiple actions in Word.

Formatting Characters and Paragraphs

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You've probably seen documents created by friends or work colleagues and envied their different fonts, italicized and boldfaced type, and fancy paragraph formatting. This chapter explains how to format both characters and paragraphs. You will learn how to change the appearance, size, and color of the characters in your documents. You will also learn the ins and outs of formatting paragraphs: aligning text to the left, right, and center of the page; increasing a paragraph's line spacing; and indenting paragraphs. This chapter also describes how to add borders to paragraphs and how to create bulleted and number lists.

Knowing how to format characters and paragraphs gives your documents more impact and makes them easier to read. Let's get started!

Using Exercise Files

Exercise files are provided so users can practice the topic(s) covered in each lesson. There are two ways you may use the exercise files:

- Open the exercise file for a lesson and perform the lesson exercise. Close the exercise file.
- Open the exercise file for a lesson and perform the lesson exercise. Keep the file open and perform the exercise for the following lesson and so on for the remainder of the chapter.

The exercises are written so that you may “build upon them”, meaning the exercises in a chapter can be performed in a succession from the first lesson to the last.

Changing Font Type

One way to emphasize text in a document is by changing its font type. A font type is a set of characters with the same design and shape.

1. Select the text you want to format.
2. Click the **HOME** tab on the Ribbon and click the **Font** list arrow in the Font group.

A list of the fonts that are available on your computer appears.

✔ **Tip:** As you point to different font types in the Font list, the selected text changes to show you how it will look (Live Preview).

3. Select a font from the list.

The selected text is changed, and any new text that you enter will appear in the new font type.

🔗 **Other Ways to Change Font Type:**
When text is selected, click the **Font** list arrow on the Mini Toolbar. Or, click the **Dialog Box Launcher** in the Font group, or press **<Ctrl> + <Shift> + <F>** to open the Font dialog box. Select a font from the Font list and click **OK**.

✔ **Tip:**

- ✔ The font you choose changes the look and feel of a document. For example, a professional document would probably use a more formal font like Times New Roman (which you are reading). On the other hand, a more informal document might use a friendlier font, such as *Andy*. Or, if you were writing a report about Egyptian art, you could use the Egyptian-flavored *Papyrus* font as a heading accent.

Exercise

- **Exercise File:** Board of Directors Meeting4-1.docx
- **Exercise:** Apply the “Cambria” font type to the “Board of Directors Meeting” text in the first line of the document.

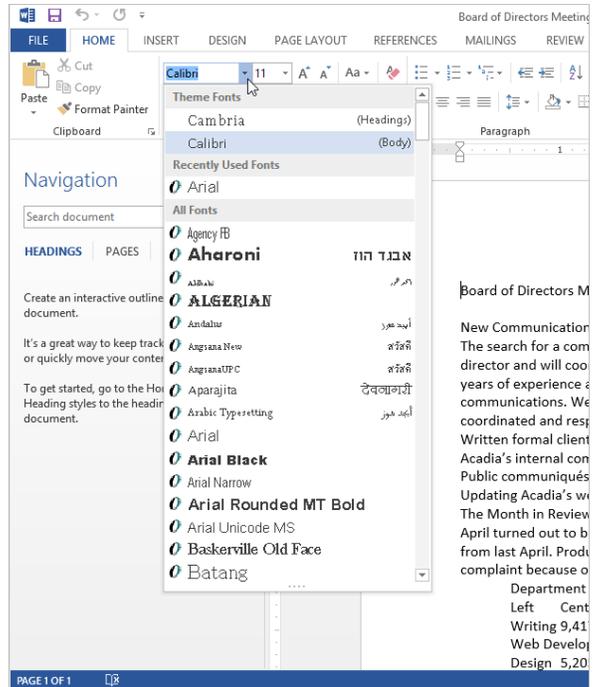


Figure 4-1: Selecting a new font type.

Table 4-1: Common Font Types

Calibri	Arial
Times New Roman	Courier
Verdana	Trebuchet MS

Changing Font Size

Making text larger is another way to emphasize text.

1. Select the text you wish to format.
2. Click the **HOME** tab on the Ribbon and click the **Font Size** list arrow in the Font group.

A list of font sizes appears.

✔ **Tip:** As you point to different sizes in the Font Size list, the selected text changes to show you how it will look (Live Preview).

3. Select a font size from the list.
The selected text is changed, and any new text that you enter will appear in the new font size.

🔗 **Other Ways to Change Font Size:**

Press **<Ctrl> + <Shift> + <>>** to increase font size, and press **<Ctrl> + <Shift> + <<<** to decrease font size.

Click the **Font Size** list arrow on the Mini Toolbar and select a font size from the list.

Click the **HOME** tab on the Ribbon and click the **Increase** or **Decrease Font Size** button in the Font group.

✔ **Tip:** Font size is measured in points (pt.) that are 1/72 of an inch. The larger the number of points, the larger the font.

📖 **Exercise**

- **Exercise File:** Board of Directors Meeting4-2.docx
- **Exercise:** Apply 18-pt font size to the “Board of Directors Meeting” text.

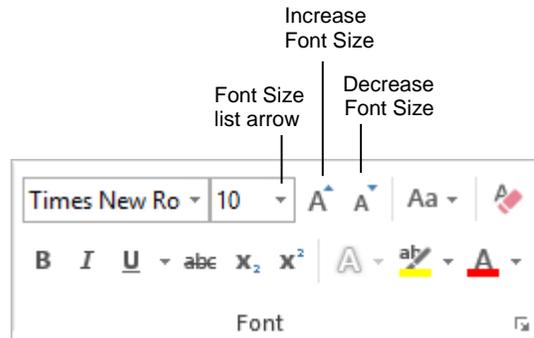


Figure 4-2: The Font group.

Table 4-2: Common Font Sizes

8 point	Captions, labels
10 point	Large amounts of text
12 point	Large amounts of text
14 point	Subheadings, headings, titles
18 point	Headings, titles

Table 4-3: Font Size Keystroke Shortcuts

Increase Font Size	<Ctrl> + <Shift> + <>>
Decrease Font Size	<Ctrl> + <Shift> + <<<

Changing Font Color and Highlighting Text

Changing font color is yet another way to emphasize text in a document.

Change font color

Changing font color makes text stand out against the white background of the document.

1. Select the text you wish to format.
2. Click the **HOME** tab on the Ribbon and click the **Font Color** button list arrow in the Font group.

A list of font colors appears.

✔ **Tip:** As you point to different colors in the Font Colors list, the selected text changes to preview how it will look. (Live Preview)

3. Select the color you want to use.

The selected text is changed, and any new text that you enter will appear in the new font color.

✔ **Tip:** You can also apply a gradient, or gradual color change, to a font. When you select **Gradient** from the list of font colors, a list of options appears. Select the gradient you wish to use or create one of your own.

Other Ways to Change Font Color:

Click the **Font Color** button list arrow on the Mini Toolbar and select a color from the list.

Click the **Dialog Box Launcher** in the Font group, press **<Ctrl> + <Shift> + <F>** to open the Font dialog box. Click the **Font color** list arrow, select a color, and click **OK**.

✔ Tips:

- ✓ If you are using a template or theme, the Font Color list will display only those colors that coordinate with the template or theme. If you don't like any of the available colors, select **More Colors** from the list to display the Colors dialog box.
- ✓ The Font Color button always displays the color that was used most recently. To quickly apply this color to other text, simply click the **Font Color** button—not the list arrow.
- ✓ When applying color to text, make sure to keep it subtle. No one wants to stare at neon green text.

Exercise

- **Exercise File:** Board of Directors Meeting4-3.docx
- **Exercise:** Apply blue font color to the “Board of Directors Meeting” text.
Highlight the text “Acadia received only one customer complaint because of a delay.”

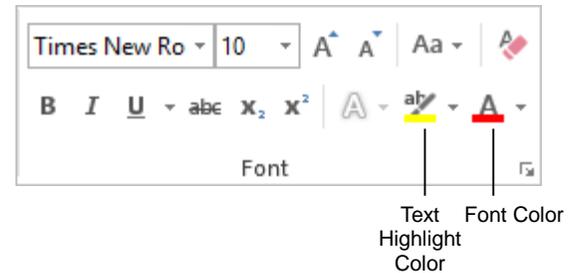


Figure 4-2: The Font group.

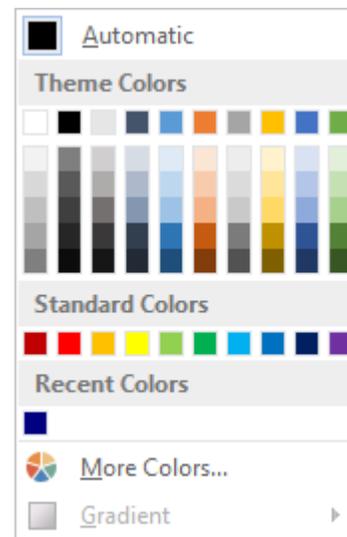


Figure 4-3: The Font Colors list appears when you click the Font Color button list arrow.

Highlight text

Highlighted text changes the background behind text so it looks like a marker was drawn across it.

1. Click the **HOME** tab on the Ribbon and click the **Text Highlight Color** button list arrow in the Font group.

A list of colors you can use to highlight text appears.

Other Ways to Highlight Text:

Select the text you want to highlight, then click the **Text Highlight Color** button on the Mini Toolbar.

2. Select the color you want to use.

The cursor changes to indicate it is ready for highlighting text.

3. Click and drag the  highlight cursor across text you want to highlight.

When you no longer want to highlight text, turn off the highlighter.

4. Click the **Text Highlight Color** button.

The highlighter is turned off.

Other Ways to Stop Highlighting:

Click the **Text Highlight Color** button list arrow and select **Stop Highlighting** to remove the highlighting cursor.

Tip:

- ✓ To remove text highlighting, click the **Text Highlight Color** button list arrow and select **No Color**. Click and drag across highlighted text to remove highlighting.

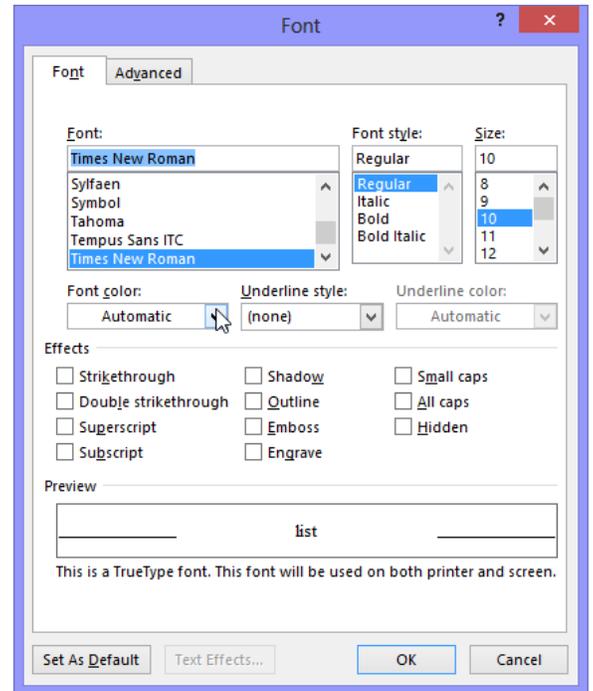


Figure 4-4: The Font dialog box.

Changing Font Styles and Effects

In addition to changing font type, size, and color, you can also emphasize the text in a document by changing the font style and adding font effects. The most common and popular styles are bold, italic, and underline, but other effects can be applied, such as shadow and strikethrough.

Change font style

1. Select the text you wish to format.
2. Click the **HOME** tab on the Ribbon and click the appropriate button in the Font group.

The formatting is applied to the selected text.

- **Other Ways to Apply Font Styles or Effects:**
 Select the text you wish to format and click the appropriate button on the Mini Toolbar.

Use the keystroke shortcuts. See **Table 4-4: Font Styles and Effects Keystroke Shortcuts** for popular shortcuts.

Click the **Dialog Box Launcher** in the Font group, press **<Ctrl> + <Shift> + <F>** to open the Font dialog box and apply formatting from there.

Add text effects

Using boldface, italics, and underline makes your text stand out but sometimes it's not quite enough. Word 2013 provides even more text effects to add visual impact to your documents.

1. Select the text to you want to format.
2. Click the **HOME** tab on the Ribbon and click the **Text Effects and Typography** button in the Font group.

A list of available text effects appears.

You can apply one of the available text effects, or you can create your own text effects.

- **Other Ways to Add Text Effects:**
 Press **<Ctrl> <Shift> + <F>** to open the Font dialog box, click the **Text Effects** button and select the text effect(s) you wish to use.

3. Select the text effect you wish to use.

The text effect is applied.

Exercise

- **Exercise File:** Board of Directors Meeting4-4.docx
- **Exercise:** Apply bold formatting to the “New Communications Director” text.
Apply bold and italics formatting to the sixth line from the bottom, the line that begins with the word “Department”.

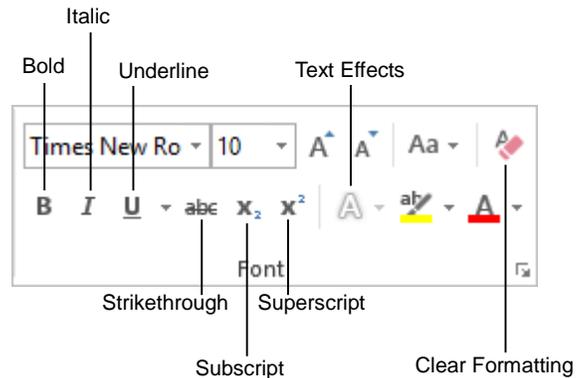


Figure 4-5: The Font group.

Table 4-4: Font Styles and Effects Keystroke Shortcuts

Bold	<Ctrl> +
Italic	<Ctrl> + <I>
Underline	<Ctrl> + <U>
Subscript	<Ctrl> + <=>
Superscript	<Ctrl> + <Shift> + <+>

Table 4-5: Font Effects in the Font Dialog Box

Strikethrough	Shadow	SMALL CAPS
Double strikethrough	Outline	ALL CAPS
SuperScript	Emboss	Hidden*
SubScript	Engrave	

* Hidden text does not normally appear when the document prints.

✓ Tips:

- ✓ To remove a font style or effect, select the text and click the **Clear All Formatting** button in the Font group to remove any formatting applied to the selected text.
- ✓ You can apply several font styles to text, but be wary—too many font styles can make text difficult to read. Try to limit your document to two or three font types and styles.
- ✓ Text effects are a neat feature, but they may not be suitable for every document. Think about the purpose of the document and the audience that will be reading a document to decide if text effects will enhance your font or not.



Figure 4-6: Click the Text Effects button to view available text effects or to create your own text effects.

Table 4-6: Text Effect Options

Outline 	Choose a color outline to outline selected text.
Shadow 	Choose a type of shadow to apply to the text.
Reflection 	Apply a reflection to selected text.
Glow 	Add a glow effect and choose the color that the text should glow.

Applying Spacing and Ligatures

Word allows you to format how individual characters are set in a document. For example, you can adjust spacing between characters or add typographical effects like ligatures to make your document look polished.

Tip:

- ✓ Word 2013 fonts include a new type of font, OpenType font. Unlike other types of fonts, OpenType fonts support advanced typographical features such as ligatures.

Apply character spacing

You can change the spacing between individual characters.

1. Select the text you wish to format.
You can format selected text or a whole document.

2. Click the **HOME** tab and click the **Dialog Box Launcher** in the Font group.

The Font dialog box appears.

- **Other Ways to Open the Font Dialog Box:** Right-click the mouse and select **Font** from the contextual menu. Or, press **<Ctrl> + <D>**.

3. Click the **Advanced** tab.
See **Table 4-7: Character Spacing Options**, for options on character spacing.

- ✓ **Tip:** As you select options, a preview of the formatted text appears at the bottom of the dialog box.

4. Select the option(s) under the Character Spacing heading you want to apply and click **OK**.

The spacing is applied to the text.

Apply ligatures

A ligature is a combination of characters written as though they were a single character. Ligatures can add a more professional feel to the document or a give it a historical look.

1. Select the text you wish to format.
You can format selected text or a whole document.

Exercise

- **Exercise File:** Board of Directors Meeting4-5.docx
- **Exercise:** Apply Standard and Contextual ligatures to the text “New Office Manager”.

Table 4-7: Character Spacing Options

Scale	Adjusts the width of the characters, but maintains their height.	100%: Office 50%: Office 200%: Office
Spacing	Adjusts the space between characters.	Normal: Office Expanded: Office Condensed: Office
Position	Adjusts the position of the characters relative to the line.	Normal: Office Raised: Office Lowered: Office
Kerning for fonts	Automatically adjusts the spacing between characters.	Kerning on: WAR Kerning off: WAR



Figure 4-7: Ligatures connect certain letter combinations, such as the “ff” in “Office”.

Formatting Characters and Paragraphs

- Click the **HOME** tab and click the **Dialog Box Launcher** in the Font group.

The Font dialog box appears.

-  **Other Ways to Open the Font Dialog Box:**
 Right-click the mouse and select **Font** from the contextual menu. Or, press **<Ctrl> + <D>**.

- Click the **Advanced** tab.

- Click the **Ligatures** list arrow.

You can select from the following three options:

- Standard only:** Uses formally recognized ligatures.
 - Standard and Contextual:** Uses formally recognized ligatures as well as ligatures that are appropriate for use with the selected font, but that are not standard.
 - Historical and Discretionary:** Uses historical ligatures that were once standard but are no longer commonly used. Also uses ligatures the font designer included for a specific purpose.
-  **Tip:** As you select ligatures, a preview of the formatted text appears at the bottom of the dialog box.

- Select the ligature option you want to apply and click **OK**.

The ligature is applied to the text.

-  **Tip:** There are other options you can apply to OpenType fonts as well. See **Table 4-8: OpenType Features** for more information about these options.

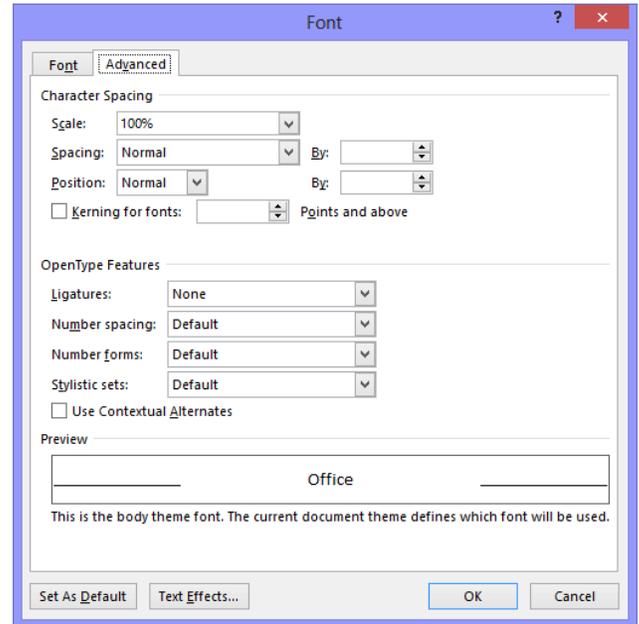


Figure 4-8: The Advanced tab of the Font dialog box.

Table 4-8: OpenType Features

Number spacing	<ul style="list-style-type: none"> Default: The default number spacing for the font. Proportional: Numbers are spaced with varying widths, much like letters. Tabular: Each number has the same width. Select this option when you want numbers to align, such as in a table.
Number forms	<ul style="list-style-type: none"> Default: The default number form for the font. Lining: Numbers with the same height that don't extend below the baseline of the text. Old Style: The lines of the characters flow above or below the line of the text, making the numbers easier to read.
Stylistic sets	A set of characteristics that changes the look of the text. A font may have up to 20 different style sets.
Use Contextual Alternatives	Select this check box to modify the formatting of letters or combinations of letters based on the surrounding characteristics.

Creating Lists

Lists are a great way to present paragraphs of related information.

Create bulleted and numbered lists

Use bulleted lists when the order of items in a list doesn't matter, such as listing items you need to buy. When the order of items in a list does matter, such as to present step-by-step instructions, try using a numbered list.

1. Select the lines you want to use for the list.

Each line that you want to be bulleted or numbered must appear as its own paragraph.
2. Click the **HOME** tab on the Ribbon and click the **Bullets** or **Numbering** buttons in the Paragraph group.

The selected lines are bulleted or numbered. Word includes default bullets and numbering, but you can select another style if you would like.
3. (Optional) Click the **Bullets** or **Numbering** button list arrow and select an option from the library.

Tip:

- ✓ To create a new type of bullet or numbering scheme, click the **Bullets** or **Numbering** button list arrow and select **Define New Bullet** or **Define New Number Format** from the library. Then define the settings in the dialog box.

Create a multilevel list

A multilevel list applies different characters to the levels of text in the document. Outlines and legal documents are examples of multileveled lists.

1. Select the lines you want to include in the list.

Each line that you want to be marked must be its own paragraph. Indentations and outline levels will determine the character that is applied to a list item.
2. Click the **HOME** tab on the Ribbon and click the **Multilevel List** button in the Paragraph group.

A list of multilevel list types appears.
3. Select the multilevel list you want to use.

The list is applied to the selected items.

Exercise

- **Exercise File:** Board of Directors Meeting4-6.docx
- **Exercise:** Create a bulleted list from the four lines, beginning with the line "Written formal client correspondence" and ending with the line "Updating Acadia's web site".

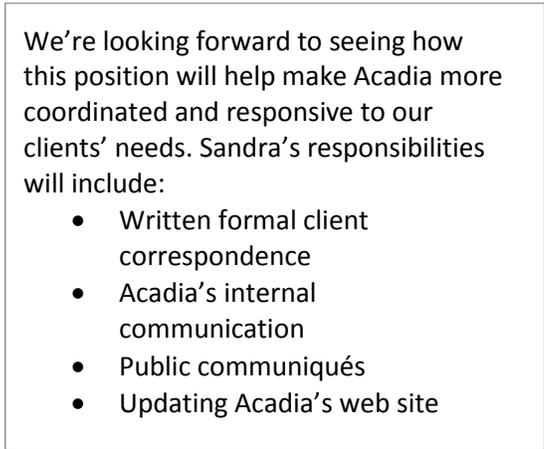


Figure 4-9: A bulleted list.

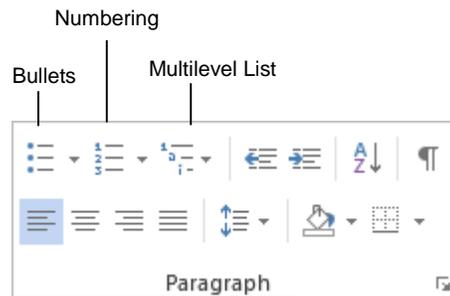


Figure 4-10: The Paragraph group.

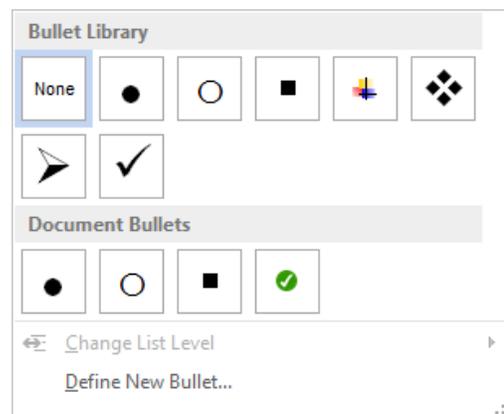


Figure 4-11: Choose the bullet style you would like to use from the Bullet Library.

- ✓ **Tip:** To create a new type of multilevel list, click the **Multilevel List** button and select **Define New Multilevel List**. Then define the settings in the dialog box.

Reset numbering

Numbered lists automatically number each list item in order. However, there are some types of lists where you will need to change a number manually and have Word renumber the items that follow accordingly. You can use this process in a numbered or multilevel list.

1. Right-click the number in the list you want to change. A contextual menu appears.

2. Select **Set Numbering Value** from the list.

The Set Numbering Value dialog box appears.

There are two options you may use to reset the numbering:

- **Start new list:** Select this option to start a new list at the number you specify in the “Set value to” box.
- **Continue from previous list:** Select the “Advance value (skip numbers)” check box and enter the number you wish to begin on in the “Set value to” box.

3. Specify how you want to reset the numbered list and click **OK**.

✓ Tips:

- ✓ To remove bullets and numbering from a list, select the list and click the **Bullets** or **Numbering** buttons in the Paragraph group on the Ribbon.
- ✓ You may sort the items in a list. Select the list and click the **Sort** button in the Paragraph group. Determine how you would like the text to be sorted in the Sort Text dialog box.

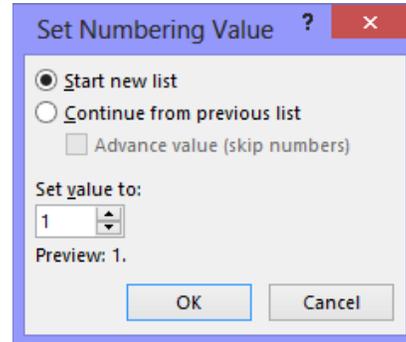


Figure 4-12: The Set Numbering Value dialog box.

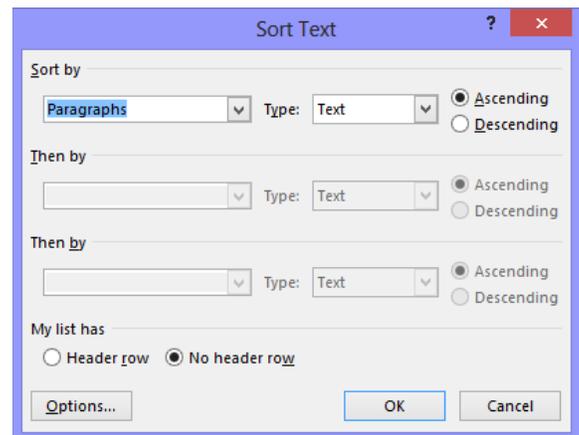


Figure 4-13: The Sort Text dialog box.

Changing Paragraph Alignment

This lesson moves on to paragraph formatting and how to align paragraphs to the left, right, center, or justified on a page.

1. Place the insertion point in the paragraph you want to change. Or, select the paragraphs you want to change.
2. Click the **HOME** tab on the Ribbon and click the **Align Left**, **Center**, **Align Right**, or **Justify** button in the Paragraph group.

The alignment of the paragraph(s) is changed.

- 🔍 **Other Ways to Change Paragraph Alignment:** Click the **Dialog Box Launcher** in the Paragraph group. On the Indents and Spacing tab in the Paragraph dialog box, click the **Alignment** list arrow and select an alignment. Click **OK**.

The images below show how each alignment might look in a document.

Exercise

- **Exercise File:** Board of Directors Meeting4-7.docx
- **Exercise:** Apply center alignment to the “Board of Directors Meeting” heading.

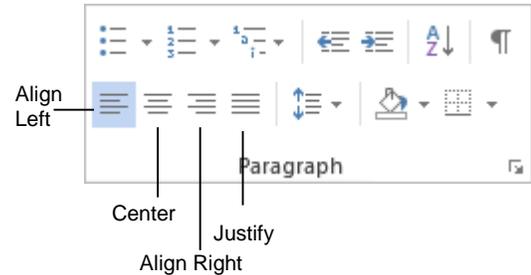


Figure 4-14: The Paragraph group.



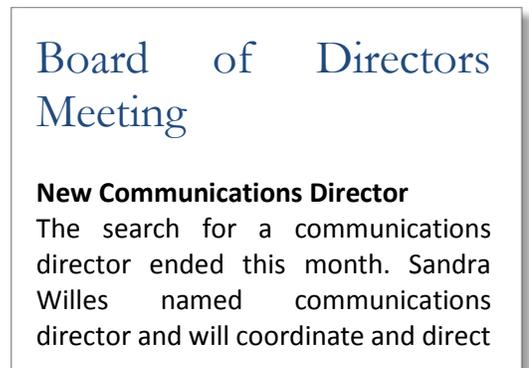
Align Left (<Ctrl> + <L>)



Align Right (<Ctrl> + <R>)



Center (<Ctrl> + <E>)



Justify (<Ctrl> + <J>)

Figure 4-15: Examples of paragraph alignment.

Adding Paragraph Borders and Shading

Adding borders and shading to paragraphs can make them more attractive, organized, and easy to read.

Add a paragraph border

Borders are lines that you can add to the top, bottom, left, or right of paragraphs. They are especially useful for emphasizing headings.

1. Place the insertion point in the paragraph to which you want to add the border.

If you want to add the same kind of border to several paragraphs, select them all at once.

2. Click the **HOME** tab on the Ribbon and click the **Border** button list arrow in the Paragraph group.

A list of borders you can add to the selected paragraph(s) appears. Use the examples shown next to each border option to guide your decision.

If the border configuration you want doesn't appear in the list, add one border at a time.

3. Select a border type.

The border is applied.

Notice that the border option you chose now appears as the selected type on the Border button. If you want to apply the same border to another paragraph, just click the **Border** button.

- ✔ **Tip:** To remove a border, select the **No Border** option under the Border button.

Add paragraph shading

Color the background of a paragraph by adding shading.

1. Place the insertion point in the paragraph to which you want to add the shading.

If you want to add the same shading to several paragraphs, select them all at once.

2. Click the **HOME** tab on the Ribbon and click the **Shading** button list arrow in the Paragraph group.

A list of colors that coordinate with the Theme Color that is currently selected appears.

- ✔ **Tip:** If the color you want to use does not appear in the list, click **More Shading Colors** to choose from a larger array of colors.

Exercise

- **Exercise File:** Board of Directors Meeting4-8.docx
- **Exercise:** Add a blue border to the bottom of the “New Communications Director” heading.

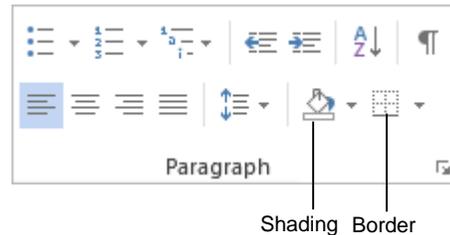


Figure 4-16: The Paragraph group.

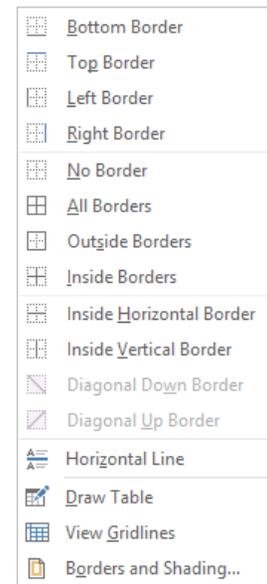


Figure 4-17: This list of border options appears when you click the Border button list arrow.

3. Select the **color** you want to use.

The shading is applied.

Notice that the color you chose now appears as the selected color on the Shading button. If you want to apply the same shading to another paragraph, just click the Shading button.

- ✓ **Tip:** When you use shading, make sure the shading color complements the font color so the font is readable.

Borders and Shading dialog box

The Borders and Shading dialog box is another way to work with borders and shading in paragraphs.

1. Select the paragraph(s) to which you want to add borders or shading.
2. Click the **HOME** tab on the Ribbon and click the **Border** button list arrow in the Paragraph group.
3. Select **Borders and Shading** from the list.

The Borders and Shading dialog box appears.

- **To apply a border:** Click the **Borders** tab and click the side(s) (top, bottom, left, and/or right) of the paragraph in the Preview diagram where you want to apply the borders.
- **To apply shading:** Click the **Shading** tab. Click the **Fill** list arrow and select the color you want to use.

4. Click **OK**.

✓ **Tips:**

- ✓ You may also add a pattern. On the Shading tab of the Borders and Shading dialog box, click the **Style** list arrow to select a pattern style and click the **Color** list arrow to select a pattern color.
- ✓ To add a border or shading to text, not an entire paragraph, select the text and open the Borders and Shading dialog box. Click the **Apply to** list arrow and select **Text**. Then specify the border and shading options you want to use.



Figure 4-18: A paragraph border.

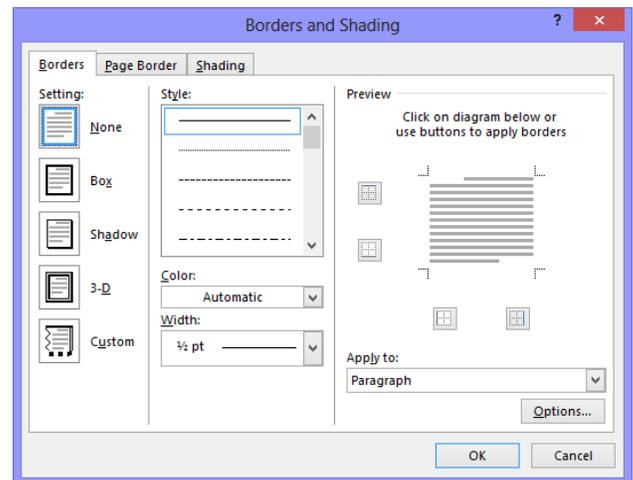


Figure 4-19: The Borders and Shading dialog box.

Changing Line Spacing

Adding space between lines makes a document easier to read.

1. Place the insertion point in the paragraph you want to change. Or, select the paragraphs you want to change.
2. Click the **HOME** tab on the Ribbon and click the **Line and Paragraph Spacing** button in the Paragraph group.
A list of spacing options appears. The default line spacing is 1.0 or Single, which accommodates the largest font in that line, plus a small amount of space.
3. Select the spacing you want to use.

The line spacing is applied to the paragraph(s).

- 🔍 **Other Ways to Change Line Spacing:**
 Click **HOME** tab on the Ribbon and click the **Dialog Box Launcher** in the Paragraph group. On the Indents and Spacing tab, click the **Line spacing** list arrow and select an option. Click **OK**.

Table 4-9: Line Spacing Options

Single	Single spacing—line spacing that accommodates the largest font in that line, plus a small amount of extra space. This is the default setting for paragraphs.
1.5 Lines	Space-and-a-half spacing—line spacing for each line that is one-and-one-half times that of single line spacing. For example, if 10-point text is spaced at 1.5 lines, the line spacing is a little over 15 points.
Double	Double-spacing—line spacing for each line that is twice that of single line spacing. For example, in double-spaced lines of 10-point text, the line spacing is a little over 20 points.
At Least	Minimum line spacing that Word can adjust to accommodate larger font sizes that would not otherwise fit within the specified spacing.
Exactly	Fixed line spacing that Word does not adjust. This option makes all lines evenly spaced.
Multiple	Line spacing that is increased or decreased by a percentage that you specify. For example, setting line spacing to a multiple of 1.2 would increase the space by 20 percent, while setting line spacing to a multiple of 0.8 would decrease the space by 20 percent. Setting the line spacing at a multiple of 2 is equivalent to setting the line spacing at Double. In the “At” box, type or select the line spacing you want. The default is three lines.

Exercise

- **Exercise File:** Board of Directors Meeting4-9.docx
- **Exercise:** Apply 1.5 line spacing to all text below the “New Communications Director” heading.

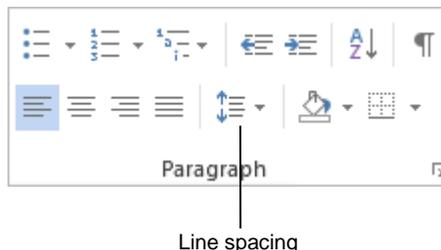


Figure 4-20: The Paragraph group.

Single (1.0) line spacing

The search for a communications director ended this month. Sandra Willes named communications director and will coordinate and direct all formal internal and client communications.

1.5 line spacing

The search for a communications director ended this month. Sandra Willes named communications director and will coordinate and direct all formal internal and client communications.

Double (2.0) line spacing

The search for a communications director ended this month. Sandra Willes named communications director and will coordinate and direct all formal internal and client communications.

Figure 4-21: Line spacing examples.

Changing Spacing between Paragraphs

Adding space between the paragraphs in a document gives it structure and makes it easier to read.

1. Place the insertion point in the paragraph you want to change. Or, select the paragraph(s) you want to change.
2. Click the **HOME** tab on the Ribbon and click the **Dialog Box Launcher** in the Paragraph group.

The Paragraph dialog box appears. You can adjust the space before and after a paragraph:

- **Before:** Adds a space above the paragraph.
- **After:** Adds a space below the paragraph.

3. Select the spacing you want to use and click **OK**.

The paragraph(s) are changed with the paragraph spacing.

- 👉 **Other Ways to Change Paragraph Spacing:** Click the **Line and Paragraph Spacing** button in the Paragraph group. Select **Add Space Before Paragraph** or **Add Space After Paragraph**. By default, 12 pts. of space are added in the direction specified.

✔ **Tip:**

- ✔ To remove paragraph spacing, change the spacing values to 0 pt. in the Paragraph dialog box. Or, click the **Line and Paragraph Spacing** button in the Paragraph group and select **Remove Space Before Paragraph** or **Remove Space After Paragraph**. Or, click the **PAGE LAYOUT** tab on the Ribbon and adjust the **Before** and **After** boxes in the Paragraph group.

Exercise

- **Exercise File:** Board of Directors Meeting4-10.docx
- **Exercise:** Add 6 pt. of spacing before and 12 pt. of spacing after the “New Communications Director” heading.

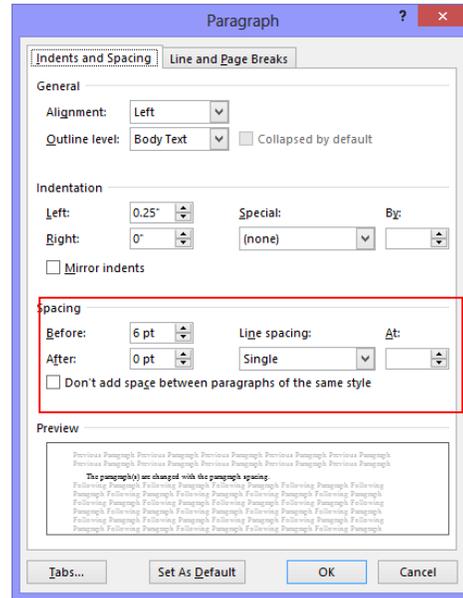


Figure 4-22: Spacing options in the Paragraph dialog box.



Without paragraph spacing



With paragraph spacing

Figure 4-23: Spacing for the New Communications Director paragraph.

Copying Formatting

If you find yourself applying the same formatting over and over again, then you should familiarize yourself with the Format Painter tool. The Format Painter copies how text is formatted and lets you apply that formatting elsewhere.

1. Select the text with the formatting you want to copy.

The Format Painter will copy character (font color or italics) and paragraph (line spacing, indentation) formatting attributes of the selected text.

2. Click the **HOME** tab on the Ribbon and click the **Format Painter** button in the Clipboard group.

The insertion point changes to a paintbrush ().

 **Other Ways to Access the Format Painter:**

Right-click the selected text and select the **Format Painter** button on the Mini Toolbar.

-  **Tip:** Single-click the **Format Painter** button to apply copied formatting once. Double-click the **Format Painter** button to apply copied formatting multiple times.

3. Click and drag the paintbrush () across the text to which you want to apply the copied formatting.

The copied formatting is applied.

 **Tips:**

- ✓ If you double-click the Format Painter button, click the **Format Painter** button again to deactivate it, or press **<Esc>**.
- ✓ To copy paragraph formatting (such as line or paragraph spacing) as well as text formatting, select the entire paragraph you want to copy, then click the **Format Painter** button.

Exercise

- **Exercise File:** Board of Directors Meeting4-11.docx
- **Exercise:** Copy the formatting of the “New Communications Director” heading to “The Month in Review” heading.

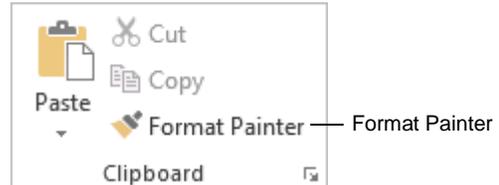


Figure 4-24: The Clipboard group.

Setting Tab Stops

Tabs make it easy to align text. Each time you press the <Tab> key, the insertion point moves to the next tab stop. Word has left tab stops set at every half-inch by default, but you can easily create your own stops to be located in a specific position or using a different alignment.

Tip:

- ✓ To add tab stops to text already in the document, select all the text and paragraphs to which you want to add the tab(s), then add the tab stop(s).

Set tabs with the ruler

The advantage of setting tabs with the ruler is that it is easy to see where the tab is positioned in the document.

1. (If the ruler is not displayed) Click the **VIEW** tab on the Ribbon and click the **Ruler** check box in the Show group.

The ruler appears.

2. Click the **Tab alignment** box on the ruler until you see the type of tab you want to use (left, center, right, decimal, or bar).

The left tab is the default and most common type of tab. However, you can align text differently by using different tabs.

3. Click where you want to add the tab stop on the ruler.

A tab of the selected tab alignment type is added to the ruler. Now, when the <Tab> key is pressed, the cursor will jump to the tab stop where you can now insert text.

Set tabs with the Tabs dialog box

The Tabs dialog box is slightly slower to work with than setting tabs with the ruler, but it is more accurate and gives you more options.

1. Click the **HOME** tab on the Ribbon and click the **Dialog Box Launcher** in the Paragraph group.

The Paragraph dialog box appears.

2. Click the **Tabs** button near the bottom of the Paragraph dialog box.

The Tabs dialog box appears.

3. Select the alignment, choose the type of leader, and specify the location of the tab stop on the ruler.

Once you've selected the tab settings, you're ready to set the tab.

Exercise

- **Exercise File:** Board of Directors Meeting4-12.docx
- **Exercise:** Select the last five lines of the document, beginning with "Department" and ending with "Design". Set a left tab stop at "1". Set a center tab stop at "6". Set a right tab stop at "9.5". Set a decimal tab stop at "12".

Tab alignment box



Figure 4-25: The Tab alignment box on the ruler.

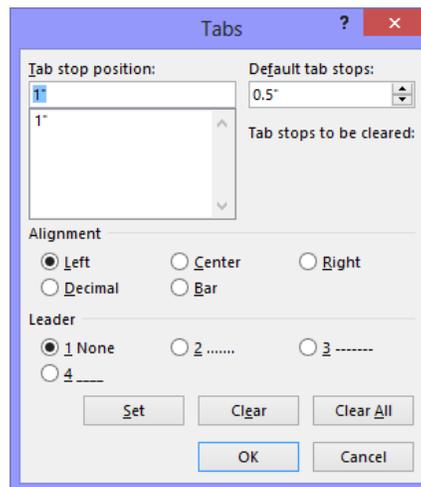


Figure 4-26: Tabs dialog box.

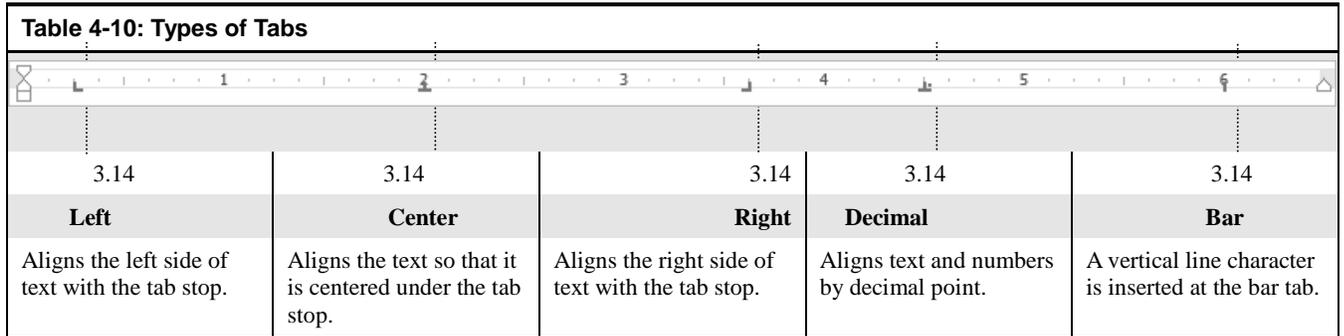
Formatting Characters and Paragraphs

4. Click **Set**.

The tab is created with the specified attributes.
Continue adding more tabs here as necessary.

5. Click **OK** once each tab is set.

The tab stops are shown on the ruler.

				
3.14	3.14	3.14	3.14	3.14
Left	Center	Right	Decimal	Bar
Aligns the left side of text with the tab stop.	Aligns the text so that it is centered under the tab stop.	Aligns the right side of text with the tab stop.	Aligns text and numbers by decimal point.	A vertical line character is inserted at the bar tab.

Adjusting and Removing Tab Stops

Tab stops are also easy to adjust and remove.

Adjust a tab stop with the ruler

- Click and drag the tab stop to the desired position on the ruler.

The tab stop is moved.

- Tip:** To remove a tab stop, click and drag the tab stop off of the ruler.

Adjust a tab stop with the Tabs dialog box

- Click the **HOME** tab on the Ribbon and click the **Dialog Box Launcher** in the Paragraph group.

The Paragraph dialog box appears.

- Click the **Tabs** button near the bottom of the Paragraph dialog box.

- Select the tab stop you want to adjust.

- Make the adjustments in the dialog box and click **Set**.

- Tip:** Click the **Clear** button to remove the tab stop, or click the **Clear All** button to remove all tab stops.

- Click **OK** to confirm the change.

The tab stop is moved.

Tip:

- If you selected text that used the tab stop, the text adjusts to the new position of the tab stop.

Adjust a tab leader

One setting that isn't available on the ruler is tab leaders. A tab leader is a line from the current location to the next tab stop. Tab leaders are usually found in tables of contents and menus.

- Open the Tabs dialog box.
- Select the tab stop to which you want to add a leader from the Tab stop position list.
- Select a leader option.

There are four leader options listed under the Leader section.

Exercise

- Exercise File:** Board of Directors Meeting4-13.docx
- Exercise:** Adjust the Center, Right and Decimal tab stops to "5.5", "9" and "11.5" respectively. Clear the previous Decimal tab stop and remove the dotted leader at the decimal tab stop.



Figure 4-27: Moving a left tab stop.

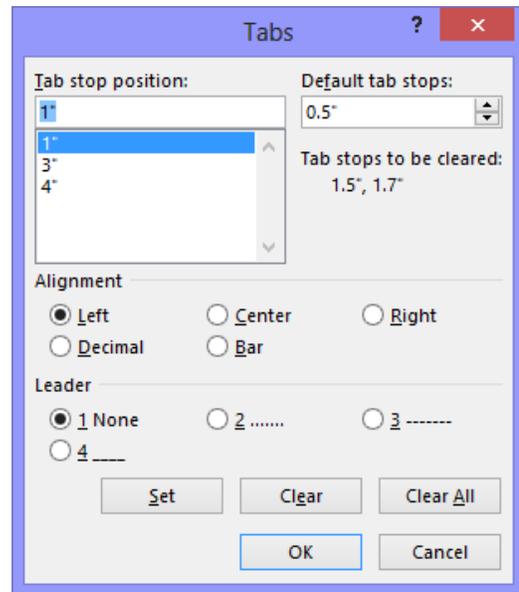


Figure 4-28: In the Tabs dialog box, select a tab stop and click Clear to delete it.

<i>Change.....</i>	<i>% Change</i>
Right.....	Decimal
\$968,723.....	+32.38%
\$747,295.....	+6.151%
\$529,207.....	+13.8%

Figure 4-29: Tab leaders make lists easier to read.

4. Click **Set**.

You can continue to add tab leaders to other tabs until you are finished.

5. Click **OK**.

Using Left and Right Indents

Indenting adds blank space between the page margin and the paragraph text. Long quotations, lists, and bibliographies are a few examples of paragraphs that are often indented.

Tip:

- ✓ To use the Left or Right indent markers, the ruler must be displayed. To show the ruler, click the **VIEW** tab on the Ribbon and click the **Ruler** check box in the Show group.

Left indent

The most common type of indent is a left indent, in which text is moved away from the left margin.

1. Select or place the insertion point in the paragraph(s) you want to change.
2. Click the **HOME** tab on the Ribbon and click the **Increase Indent** button in the Paragraph group.

The paragraph(s) are indented 0.5", or to the next indent level in the document.

- 🔗 **Other Ways to Increase Indentation:** Click and drag the **Left Indent marker** on the ruler. Or, click the **Dialog Box Launcher** in the Paragraph group and enter how much space you want the paragraph indented by in the **Left** indentation box. Or, click the **PAGE LAYOUT** tab on the Ribbon and adjust the **Left** box in the Paragraph group.

Right indent

A right indentation of a paragraph moves text away from the right margin.

1. Select or place the insertion point in the paragraph(s) you want to change.
2. Click and drag the **Right Indent** marker on the ruler.

The paragraph is indented from the right margin.

- 🔗 **Other Ways to Use Right Indent:** Click the **Dialog Box Launcher** in the Paragraph group and enter the indent in the **Right** indentation box. Or, click the **PAGE LAYOUT** tab on the Ribbon and adjust the **Right** box in the Paragraph group.

Exercise

- **Exercise File:** Board of Directors Meeting4-14.docx
- **Exercise:** Indent the paragraph below the “New Communications Director” heading once to the left. Indent the paragraph below “The Month in Review” heading 0.25” on the left and 0.5” on the right.

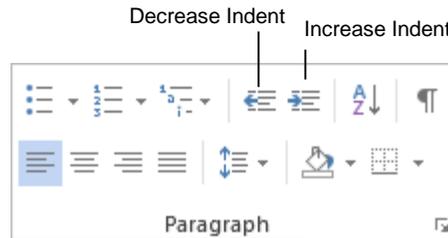


Figure 4-30: The Paragraph group.



Left Indent

Figure 4-31: Left indent marker on the Ruler.



Right indent

Figure 4-32: Right indent marker on the Ruler.

Using First Line and Hanging Indents

Besides the left and right indents, two special indents can be used in your paragraphs: hanging and first line indents.

First Line indent

A first line indentation lets you indent the first line of a paragraph independently of the other lines. Many people do this with a tab instead of changing the indent settings.

1. Select or position the insertion point in the paragraph(s) you want to indent.
2. Click the **HOME** tab on the Ribbon and click the **Dialog Box Launcher** in the Paragraph group.
3. Click the **Special** list arrow in the Indentation section and select **First line**.
4. Enter the desired indent amount in the **By** box, and click **OK**.

- **Other Ways to Use a First Line Indent:**
 Click and drag the **First Line** indent marker on the ruler. Or, click the **tab alignment** box until you see the First Line Indent marker, then click where you want to insert the indent on the ruler.

Hanging indent

In hanging indentation, the first line of a paragraph stays put next to the left margin while the other lines in the paragraph are indented. Hanging indentations are often used in bibliographies or lists.

1. Select or position the insertion point in the paragraph(s) you want to indent.
2. Click the **HOME** tab on the Ribbon and click the **Dialog Box Launcher** in the Paragraph group.
3. Click the **Special** list arrow in the Indentation section and select **Hanging**.
4. Enter the desired indent amount in the **By** box, and click **OK**.

- **Other Ways to Use a Hanging Indent:**
 Click and drag the **Hanging** indent marker on the ruler. Or, click the **tab alignment** box until you see the Hanging indent marker, then click where you want to insert the indent on the ruler.

Exercise

- **Exercise File:** Board of Directors Meeting4-15.docx
- **Exercise:** Add a 0.5” hanging indent to the paragraph below the “New Communications Director” heading. Add a 0.5” first line indent to the paragraph below “The Month in Review” heading.

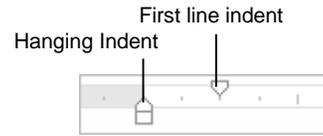


Figure 4-33: Hanging and First Line indents on the ruler.

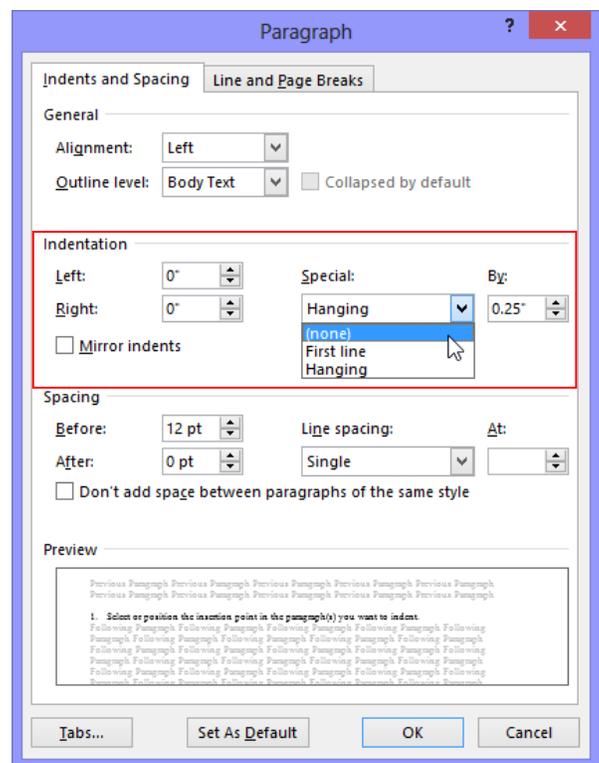


Figure 4-34: Indentation options in the Paragraph dialog box.

Formatting Characters and Paragraphs Review

Quiz Questions

- 1.
2. What is NOT the procedure for changing the font type?
 - A. Click the Font list arrow in the Font group of the Home tab.
 - B. Click the Font list arrow on the Mini Toolbar.
 - C. Click the Font button on the Formatting tab and select the desired font.
 - D. Open the Font dialog box and select a font from the Font list.
3. How is font size measured?
 - A. Points or pt
 - B. Inches or in
 - C. Spikes or sp
 - D. Pixels or pi
4. The Font Color button always displays the color that was used most recently. (True or False?)
5. The Font Color list displays colors that coordinate with the document theme. (True or False?)
6. The text highlighter turns off after highlighting text once. (True or False?)
7. You can make text appear in bold by pressing <Ctrl> + <L>. (True or False?)
8. You cannot apply ligatures to Word 2013 fonts?. (True or False?)
9. Which of the following would be best suited by a numbered list?
 - A. Things you hate about fast food.
 - B. A list of reasons why your boss should give you a raise.
 - C. A series of step-by-step instructions on how to play a DVD.
 - D. Topics you will be discussing in a speech or presentation.
10. Which of the following is NOT a way to center a paragraph?
 - A. Press <Ctrl> + <E>.
 - B. Click the Dialog Box Launcher in the Paragraph group menu and select Center from the Alignment list.
 - C. Click the Center button in the Paragraph group of the Home tab.
 - D. Select Center from the Alignment List in the Font group of the Home tab.
11. You can change a border's appearance by using the Borders and Shading dialog box. (True or False?)

12. Which of these statements is false?
 - A. You cannot change a paragraph's borders or shading once they are applied.
 - B. Paragraph shading is a background color that is applied to a paragraph.
 - C. You can add a border to the top, bottom, or sides of a paragraph.
 - D. The Borders and Shading dialog box is where you can change paragraph borders and shading at the same time.

13. How do you double-space a report?
 - A. Add single-spacing twice.
 - B. Select all the paragraphs in the document, click the Line Spacing arrow on the Formatting toolbar and select Double-space.
 - C. Press the < Enter > key at the end of each line to add extra space.
 - D. Click the Line Spacing button in the Paragraph group and select 2.0.

14. You want to make sure that a paragraph always has 18 pt. of space before it. How can you do this?
 - A. Use a more sophisticated page layout program, like Adobe PageMaker.
 - B. Open the Paragraph dialog box and enter 18 pt. in the Spacing Before box.
 - C. Type 18pt. on the line before the paragraph.
 - D. Open the Paragraph dialog box and enter 18 pt. in the Line Spacing box.

15. To copy and apply formatting more than once, single-click the Format Painter button. (True or False?)

16. Which of the following is NOT a type of tab stop?
 - A. Justified
 - B. Left
 - C. Center
 - D. Decimal

17. Which of the following statements is NOT true?
 - A. You can cycle through the types of tab stops by clicking the Tab Alignment box on the ruler.
 - B. Word has preset tab stops set at every inch by default.
 - C. You can add a tab stop by simply clicking on the ruler.
 - D. Word's tab stops are a great way to format a document.

18. Which of the following statements is NOT true?
 - A. You can remove a tab stop by dragging it off the ruler.
 - B. You can adjust a tab stop by clicking and dragging it on the ruler.
 - C. You can add, remove, and adjust tab stops from the Tabs dialog box.
 - D. You can't adjust a tab stop once it is set.

19. Which of the following is NOT a way to indent a paragraph?
 - A. Click the Increase Indent button in the Indent group on the Ribbon.
 - B. Click and drag the Right indent marker on the Ruler.
 - C. Click and drag the Left indent marker on the Ruler.
 - D. Open the Paragraph dialog box and enter how much you want the paragraph indented in the Indentation section.

20. Which of the following is the correct procedure for creating a hanging indent?
 - A. Open the Indents dialog box, click the Special list arrow, select Hanging and specify an amount in the By box.
 - B. Open the Paragraph dialog box, click the Special list arrow, select Hanging and specify an amount in the By box.
 - C. Click the Increase Indent button in the Paragraph group.
 - D. Click and drag the First Line Indent marker on the ruler.

Quiz Answers

- 1.
2. C. You cannot change fonts by clicking the Font button on the Formatting tab because there is no Formatting tab.
3. A. Font sizes are measured in points or pt.
4. True. The color of the line under the A on the Font Color button is the color that was last used.
5. True. The Font Color list displays colors that coordinate with the document theme colors.
6. False. The text highlighter stays on until it is turned off.
7. False. Press <Ctrl> + to bold.
8. False. You can apply ligatures to OpenType fonts in Word 2013.
9. C. A numbered list would be the most appropriate for a series of step-by-step instructions on how to play a DVD.
10. D. Since there isn't an Alignment List on the Ribbon, but there is one in the Paragraph dialog box.
11. True. You can change a border's appearance by using the Borders and Shading dialog box.
12. A. You can always change or remove paragraph borders and shading.
13. D. You can double-space a report by clicking the Line Spacing button in the Paragraph group and selecting 2.0.
14. B. You can add spacing before a paragraph by opening the Paragraph dialog box and entering 18 pt. in the Spacing Before box.
15. False. Double-click the Format Painter button to apply copied formatting more than once.
16. A. There isn't such a thing as a Justified tab stop.
17. B. Word does have preset tab stops — but they are set at every half-inch by default.
18. D. Tab stops are always adjustable.
19. A. The Increase Indent button is in the Paragraph group on the Ribbon: there is no Indent group.
20. B. Create a hanging indent by opening the Paragraph dialog box, clicking the Special list arrow, selecting Hanging and specifying an amount in the By box.

Formatting the Page

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Instead of working with characters and paragraphs, this chapter takes a step back and looks at how to change the appearance of entire pages. When you format a page, you determine the margins between the text and the edge of the page, the orientation of the page, and the size of the paper. These topics are covered in this chapter. This chapter also explains how to add a header or footer that appears at the top or bottom of every page in your document, how to control where the page breaks, and how to use multiple page formats.

Using Exercise Files

Exercise files are provided so users can practice the topic(s) covered in each lesson. There are two ways you may use the exercise files:

- Open the exercise file for a lesson and perform the lesson exercise. Close the exercise file.
- Open the exercise file for a lesson and perform the lesson exercise. Keep the file open and perform the exercise for the following lesson and so on for the remainder of the chapter.

The exercises are written so that you may “build upon them”, so the exercises in a chapter can be performed in succession from the first lesson to the last.

Adjusting Margins

A margin is the empty space between a document's contents and the edges of the page. Word's default margins are 1 inch on each side of the page, but you can easily change the margins to accommodate the needs of your document.

Trap: It's important that you don't confuse adjusting a document's margins with adjusting a paragraph's indentation. Document margins affect the entire document and every paragraph in it. Paragraph indentation only changes paragraphs, not the entire document.

1. Click the **PAGE LAYOUT** tab on the Ribbon and click the **Margins** button in the Page Setup group.

A list of common page margins appears.

2. Select a margin setting.

3. Click **OK**.

The margin setting is applied to the document.

Other Ways to Adjust Margins: Click the **Margins** button in the Page Setup group and select **Custom Margins**. Then change the document's margins on the Margins tab of the Page Setup dialog box.

Or, click and drag the **Left Margin**, **Right Margin**, **Top Margin**, or **Bottom Margin** line on the ruler.

Tip: If you intend to bind a document and require extra space for the bindings, use the Gutter setting on the Margins tab in the Page Setup dialog box.

Exercise

- **Exercise File:** FormatPage5-1.docx
- **Exercise:** Change the document margins to the "Narrow" margin setting.

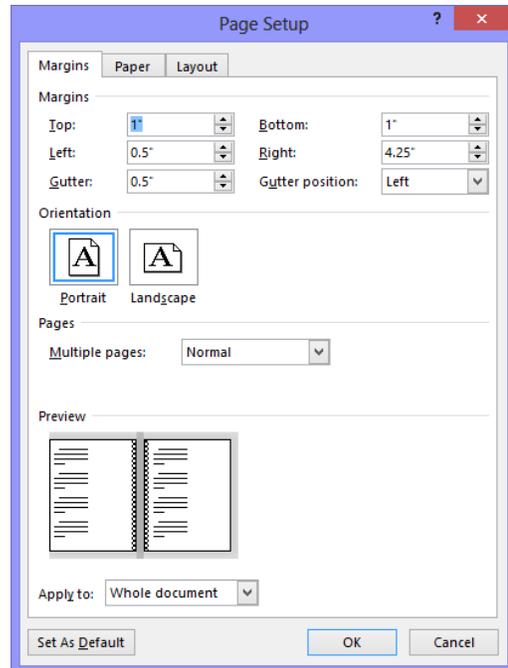


Figure 5-1: The Margins tab of the Page Setup dialog box.



Figure 5-2: You can also change page margins by dragging the margin line on the Ruler.

Changing Page Orientation and Size

The page orientation and size are two of the most obvious page layout properties of a document.

Page orientation

Every document you print uses one of two different types of page orientations: Portrait or Landscape.

1. Click the **PAGE LAYOUT** tab on the Ribbon and click the **Orientation** button in the Page Setup group.

A list of two options appears:

- **Portrait:** In Portrait orientation, the paper is taller than it is wide—like a portrait painting.
- **Landscape:** In Landscape orientation, the paper is wider than it is tall—like a landscape painting.

2. Select the page orientation you want to use.

The page layout is changed accordingly. If the ruler is displayed, notice that the dimensions of the page have changed. For example, if you were using an 8.5" x 11" page, the horizontal part of the ruler is now 11 inches across, rather than 8.5".

- **Other Ways to Change Page Orientation**
Click the **Dialog Box Launcher** in the Page Setup Group. On the Margins tab, click the orientation you want to use.

Page size

People normally print on standard Letter-sized (8½ x 11) paper, but Word can also print on other paper sizes, such as Legal-sized (8½ x 14) and other custom-sized paper. This means that you can use Word not only to print letters, but also postcards, tickets, flyers, and any other documents that use a non-standard paper size.

1. Click the **PAGE LAYOUT** tab on the Ribbon and click the **Size** button in the Page Setup group.

A list of common page sizes appears.

2. Select the page size you want to use.

The document on the screen adjusts to the selected size.

- **Tip:** If the size you want to use doesn't appear in the list, select **More Paper Sizes**. The Paper tab of the Page Setup dialog box appears, where there are more page size options, and where you can enter a custom paper size if you wish.

Exercise

- **Exercise File:** FormatPage5-2.docx
- **Exercise:** Go to page 2 of the exercise file (the "Filtering out the junk" article). Change the page size to 11" x 17" and change the page orientation to Landscape.

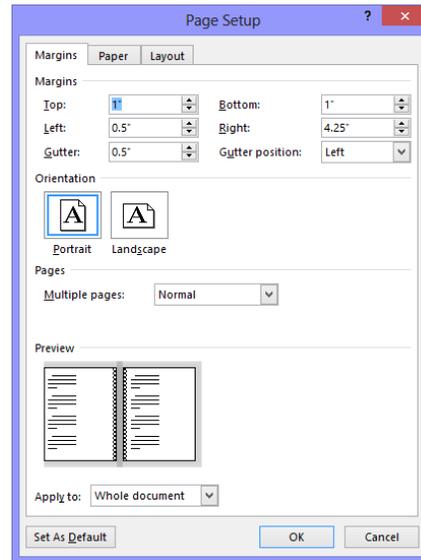


Figure 5-3: Change page orientation in the Orientation section of the Margins tab.

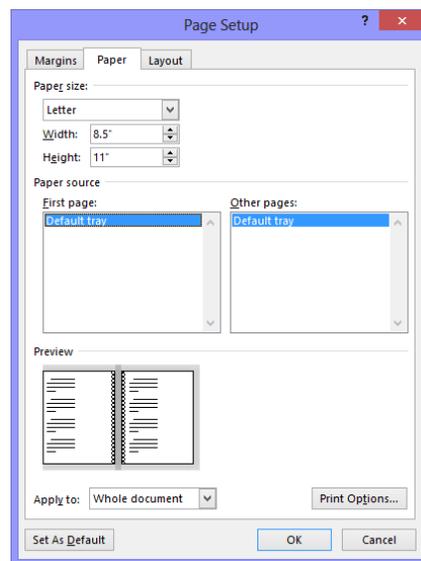


Figure 5-4: Change the size of the page under the paper tab in the Page Setup dialog box.

Using Columns

Newsletters and magazines often arrange text in two or more columns.

Format columns

1. Click the **PAGE LAYOUT** tab on the Ribbon and click the **Columns** button in the Page Setup group.

A list of popular column layouts appears.

2. Select the column arrangement you want to use.

The document on the screen adjusts to the selected layout.

- ✔ **Tip:** If the layout you want to use doesn't appear in the list, select **More Columns**. The Columns dialog box appears. Here, you can enter more columns, and adjust the size of columns on the page.

Use a column break

When you insert a column break, the insertion point jumps to the beginning of the next column on the page. For example, if you wanted to leave a column empty halfway down the page to leave space for a pull quote or picture, inserting a column break would allow you to continue your text in the next column.

1. Click the **PAGE LAYOUT** tab on the Ribbon and click the **Breaks** button in the Page Setup group.

A list of available breaks appears.

2. Select **Column** from the list.

The column break is inserted and the insertion point moves to the beginning of the next column.

Exercise

- **Exercise File:** FormatPage5-3.docx
- **Exercise:** Go to page 2 of the exercise file (the “Filtering out the junk” article). Apply a two-column page layout. Insert a column break at the beginning of the “Filter by Selection” heading near the bottom of the first column.

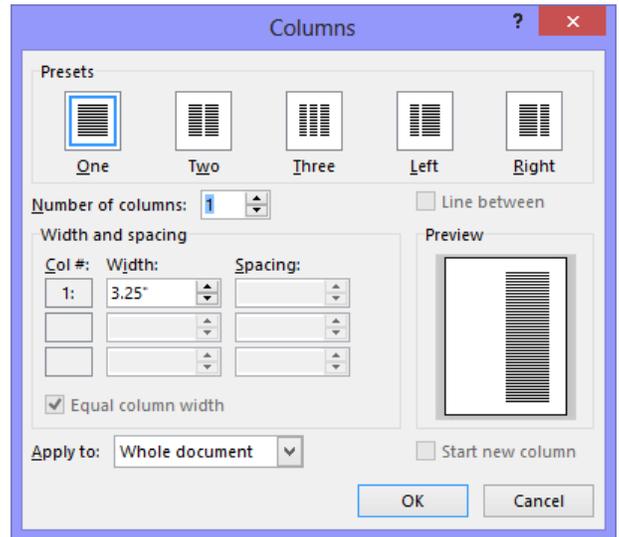


Figure 5-5: Edit and apply columns in a document in the Columns dialog box.

Using Page Breaks

This lesson explains how to control where the page breaks in a document.

Start a new page

1. Place the insertion point where you want to begin a new page.
2. Click the **INSERT** tab on the Ribbon and click the **Page Break** button in the Pages group.

Word inserts a page break at the insertion point, and any page contents that appear after the insertion point appear on the new page.

Other Ways to Insert a Page Break:
 Press **<Ctrl> + <Enter>**. Or, click the **PAGE LAYOUT** tab on the Ribbon and click the **Breaks** button in the Page Setup group. Select **Page Break** from the list.

Tip: To remove a page break, view the document in Draft view, select the page break, and press **<Delete>**.

Insert a blank page

Use this command to insert a blank page anywhere in a document.

- Click the **INSERT** tab on the Ribbon and click the **Blank Page** button in the Pages group.

Word inserts a blank page at the insertion point. The blank page is really just two page breaks.

Use paragraph line and page breaks

You can also control pagination with paragraph formatting. For example, you can make sure paragraphs appear on the same page without being on separate pages, or make sure a paragraph always starts on a new page.

1. Select the paragraph(s) to which you want to add pagination formatting.
2. Click the **PAGE LAYOUT** tab on the Ribbon and click the **Dialog Box Launcher** in the Paragraph group.
 The Paragraph dialog box appears.
3. Click the **Line and Page Breaks** tab and select the pagination and formatting options you want to use. When you're finished, click **OK**.

The formatting options are applied to the selected paragraph(s).

Exercise

- **Exercise File:** FormatPage5-4.docx
 - **Exercise:** Go to page 5 of the exercise file. Insert a page break so that the PowerPoint article begins at the top of Page 6.
- Add “Keep with next” paragraph formatting to the “Creating a rule using the Rules Wizard” heading at the bottom of page 6, so that the heading is on the same page as the following paragraph.

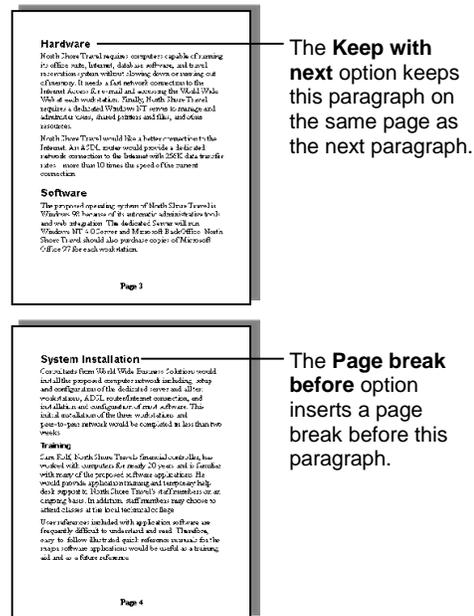


Figure 5-6: Paragraph and Page Breaks

Table 5-1: Paragraph Line and Page Break Options

Widow/Orphan control	Prevents Word from printing the last line of a paragraph by itself at the top of a page (widow) or the first line of a paragraph by itself at the bottom of a page (orphan). This option is selected by default.
Keep with next	Prevents the page from breaking between the selected paragraph and the following paragraph.
Keep lines together	Prevents the page from breaking within a paragraph.
Page break before	Inserts a page break before the selected paragraph. This is a good option for major headings.
Suppress line numbers	Prevents line numbers from appearing next to selected paragraphs if the Line Numbering option is on. This setting has no effect in documents or sections with no line numbers.
Don't hyphenate	Excludes a paragraph from automatic hyphenation.

Working with Section Breaks

Section breaks can help you control where pages break in the document, but they also allow you to apply different page formatting in the same document. A section break allows you to use different page layouts—such as margins, page orientation, headers and footers, columns, and sequence of page numbers—in the same document.

1. Click the **PAGE LAYOUT** tab on the Ribbon and click the **Breaks** button in the Page Setup group.

A list of the breaks you can insert in the document appears.

2. Select the type of break you want to insert.

The break is inserted in the document.

✓ Tips:

- ✓ By default, breaks are hidden from view. To view where breaks are located in a document, view the document in Draft view. Or, click the **HOME** tab and click the **Show/Hide** button in the Paragraph group to view breaks in Print Layout view.
- ✓ To remove a break, select the break and press **<Delete>**.

Exercise

- **Exercise File:** FormatPage5-5.docx
- **Exercise:** Go to page 7 of the exercise file. Add a Next Page Section Break to the end of the PowerPoint article. Find the section break on the first page of the document.

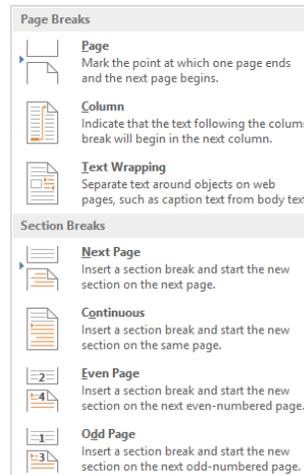


Figure 5-7: Section breaks allow you to apply different page formatting to the same document.

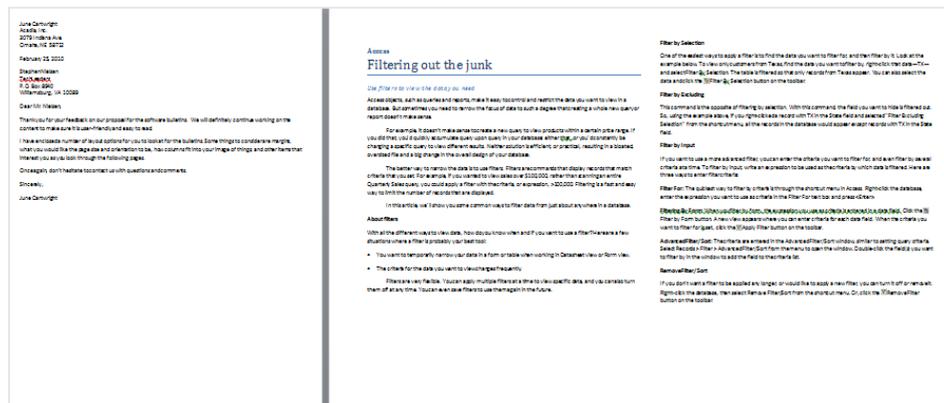


Figure 5-8: The section break at the end of page 2 allows page 3 to be a different page size and orientation.

Table 5-2: Types of Section Breaks

Next Page Section Break	Inserts a section break at the insertion point and inserts a page break so the new section starts at the beginning of a new page.
Continuous Section Break	Inserts a section break at the insertion point and starts the section immediately, without inserting a page break.
Even Page Section Break	Inserts a section break at the insertion point and starts the next section on the next even-numbered page. If the section break falls on an even-numbered page, Word leaves the next odd-numbered page blank.
Odd Page Section Break	Inserts a section break at the insertion point and starts the next section on the next odd-numbered page. If the section break falls on an odd-numbered page, Word leaves the next even-numbered page blank.

Working with Line Numbers

Adding line numbers to documents is the most direct way to guide users through complex and lengthy documents. When you apply line numbers in Word, the numbers are displayed in the left margin of the document. If there are columns in the document, the numbers appear to the of each newspaper-style column.

Line numbers are especially useful for referendums and legal documents.

1. Click the **PAGE LAYOUT** tab on the Ribbon and click the **Line Numbers** button in the Page Setup group.

A list of ways you can add line numbers appears.

- **None:** Removes line numbering in the document.
 - **Continuous:** Adds continuous line numbering to each section of the document.
 - **Restart Each Page:** Adds line numbering to the current page of the document. Restarts numbering at the beginning of the next page.
 - **Restart Each Section:** Adds line numbering to the current section of the document. Restarts numbering at the beginning of any added sections
 - **Suppress for Current Section:** Removes line numbering for the current section.1
- ✓ **Tip:** If you are applying numbering to a document that has several sections, select the sections to which you want to add numbering first.

2. Select a line numbering option.

The line numbers are applied to the document.

✓ **Tips:**

- ✓ Each line in a document can be numbered, however lines from inserted objects such as tables, footnotes, endnotes, text boxes, frames, headers, and footers are not included in line numbering.
- ✓ Line numbers are visible only in Print Layout view and Print Preview.
- ✓ To control line numbering options through the Line Numbers dialog box, select **More Line Numbering** from the Line Numbers button list. Click the **Line Numbers** button and select the line numbering options you want to use from the Line Numbers dialog box.

Exercise

- **Exercise File:** FormatPage5-6.docx
- **Exercise:** Go to page 3 of the exercise file and add line numbers to that section of the document.

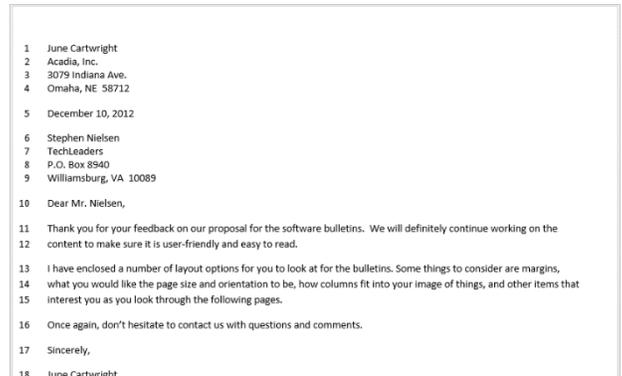


Figure 5-9: Page numbers are inserted along the left margin of the page.

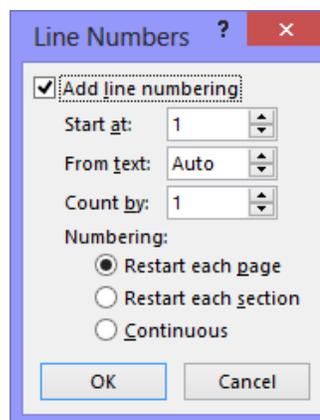


Figure 5-10: The Line Numbers dialog box.

Working with Hyphenation

Word can automatically hyphenate your text so that rather than pushing a long word at the end of the line to the next line, it breaks across lines with a hyphen. This is especially useful in documents where a lot of text has to appear in a small amount of space, such as when using justified paragraph alignment in columns, for example.

1. Click the **PAGE LAYOUT** tab on the Ribbon and click the **Hyphenation** button in the Page Setup group.

Hyphenation is turned off by default, but you may turn on automatic or manual hyphenation:

- **Automatic:** Word automatically inserts hyphens where they are needed, according to the hyphenation zone. If the document is edited and lines change, Word re-hyphenates the document.
- **Manual:** Word searches the text for words to hyphenate and asks if you would like to insert an optional hyphen. Word does not re-hyphenate the document for you. If you choose to manually hyphenate, Word will ask for approval before it inserts a hyphen.

2. Choose how you want to hyphenate the document.

Word begins the hyphenation process using the method you chose.

✓ Tips:

- ✓ To change hyphenation options, click the **Hyphenation** button in the Page Setup group and select **Hyphenation Options**.
- ✓ To remove hyphenation, click the **Hyphenation** button in the Page Setup group and select **None**.

Exercise

- **Exercise File:** FormatPage5-7.docx
- **Exercise:** Automatically hyphenate the document. Identify words that have been hyphenated as a result.

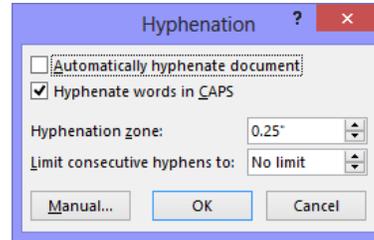


Figure 5-11: The Hyphenation dialog box.



Figure 5-12: The same document before and after hyphenation.

Working with the Page Background

Dress up pages in a document with page borders and background settings. You can line the margins of your pages with borders to give them finished edges or to bring out certain pages, and you can even create your own page designs using colors and watermarks.

Add page borders

You can line the margins of your pages with borders to give them finished edges or to bring out certain pages.

1. Click the **DESIGN** tab on the Ribbon and click the **Page Borders** button in the Page Background group.

The Page Border tab of the Borders and Shading dialog box appears.

2. Choose border properties, such as style, color, width, or art.

These properties change how the border(s) will appear around the page.

3. Click the side(s) (top, bottom, left, and/or right) of the page in the Preview diagram where you want to apply the borders.

When the preview area looks the way you want the borders to look, you're ready to apply the borders.

✔ **Tip:** You may also use the Setting options along the left side of the Page Border tab to apply borders.

4. Click the **Apply to** list arrow and select the pages to which you want to apply borders.

- **Whole document:** Applies the borders to all pages in the document.
- **This section:** Applies borders only to the current section.
- **This section – First page only:** Applies borders to the first page of the current section and nowhere else.
- **This section – All except first page:** Applies borders to all pages in the current section, except the first page.

5. Click **OK**.

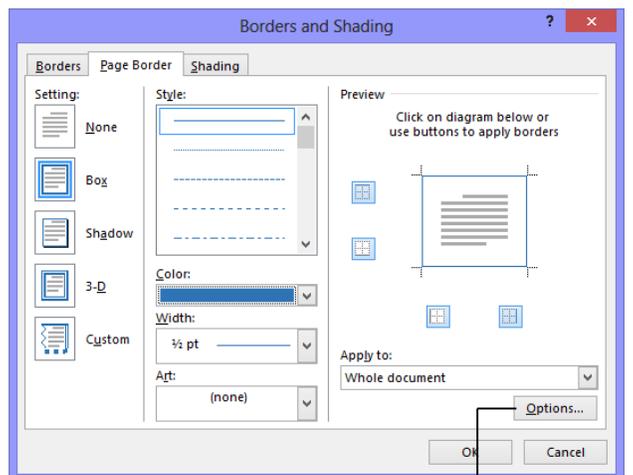
The borders are applied to the page(s) in the document.

Exercise

- **Exercise File:** FormatPage5-8.docx
- **Exercise:** Go to page 8 of the exercise file and add a blue border to all sides of the page in the current section. Add a light green page color to the document. Add a “Draft” watermark to the document.



Figure 5-13: Page with color, border, and watermark applied.



Click the Options button to define how far away from margins you want the border to appear.

Figure 5-14: The Page Border tab of the Borders and Shading dialog box.

Add page color

Add color to the background of one or several pages in the document. This formatting feature is only visible in electronic copies of the document: Word will not print the page color.

1. Click the **PAGE LAYOUT** tab on the Ribbon and click the **Page Color** button in the Page Background group.

The Page Color button displays the ten colors in the current color theme, and five shades of each color. This makes it easy to have a consistent look and feel in the document.

2. Select a color from the list.

The color is applied to the page.

- ✔ **Tip:** To remove page color, click the **Page Color** button and select **No Color**.

Add a watermark

A watermark is discrete text that indicates a document should be specially treated. It does not obscure text on the page.

1. Click the **DESIGN** tab on the Ribbon and click the **Watermark** button in the Page Background group.

A list of built-in watermarks appears, organized in different categories: Confidential, Disclaimers, Urgent. A preview of how the watermark appears on the page is shown next to each list option.

- ✔ **Tip:** To create your own watermark, click the **Watermark** button and select **Custom Watermark**. Select the **Picture watermark** or **Text watermark** option and make changes accordingly.

2. Select the watermark you would like to use.

The watermark is applied to the pages of the document.

- ✔ **Tip:** To remove the watermark, click the **Watermark** button and select **Remove Watermark**.



Figure 5-15: Choose a page color from the color palette.

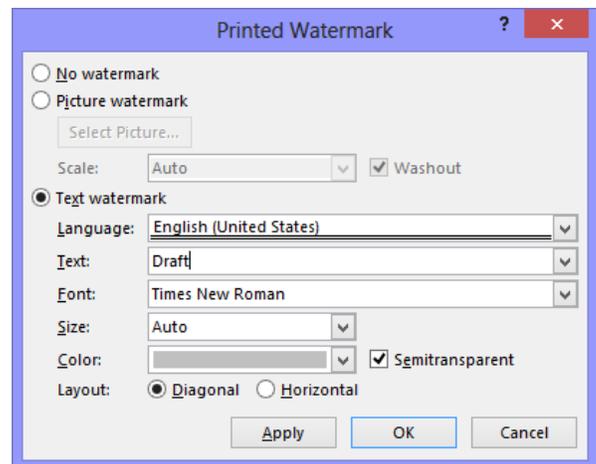


Figure 5-16: Specify how you want the watermark to look and the watermark text in the Printed Watermark dialog box.

Adding a Cover Page and Page Numbers

A cover page and page numbers are two things that are easy to add and that make your document look polished and professional.

Cover page

A cover page for your document is like the cover of a book: it contains basic information, such as the title of the document, date, and author, presented in a way that is eye-catching and welcoming to the reader.

1. Click the **INSERT** tab on the Ribbon and click the **Cover Page** button in the Pages group.

A list of built-in cover pages appears. Notice that each design has a name, which makes it easier to match up with other built-in elements, such as built-in headers and footers.

2. Select the cover page you want to insert in the document.

The cover page always appears as the first page in the document, no matter where the insertion point is located when it is inserted.

When inserted, placeholders for information appear on the cover page. Word tries to insert as much information as it can, such as user information like your name and company name, but you will probably have to insert information manually as well.

3. Click in a placeholder and type your own text.

Page numbers

Adding page numbers is easier than ever in Word 2013, and it adds a lot to documents, especially really long ones.

1. Click the **INSERT** tab on the Ribbon and click the **Page Number** button in the Header & Footer group.

First, choose where you would like the numbers to appear on the page. You can include the page numbers in three different places on the page—top, bottom, and margins.

2. Select where you want the page numbers to appear.

A list of the available built-in page number styles appears.

3. Select the page number style you want to use.

The page number style you chose appears on the current page and all the other pages in the document.

Exercise

- **Exercise File:** FormatPage5-9.docx
- **Exercise:** Add a cover page to the document and fill in the placeholders. The year should be “2013”, make the Title “Acadia Office Layouts”, Author “June Cartwright”, Company “Acadia” and remove the Date section. Add page numbers to the top right of the pages.

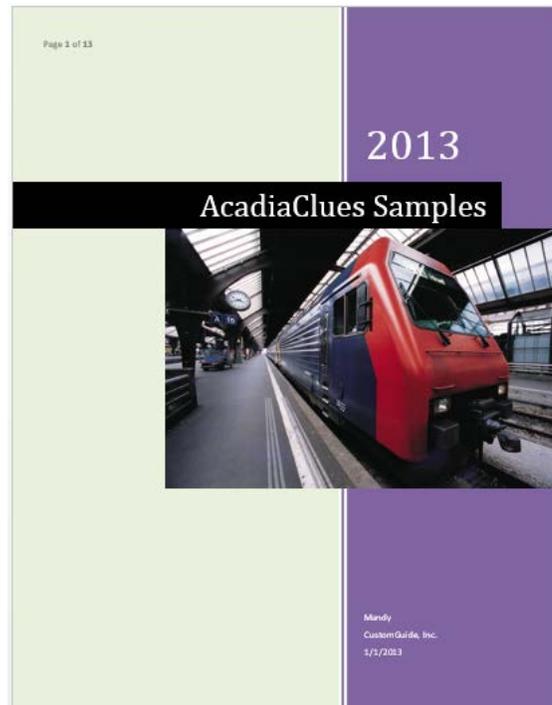


Figure 5-17: This is an example of a built-in cover page.

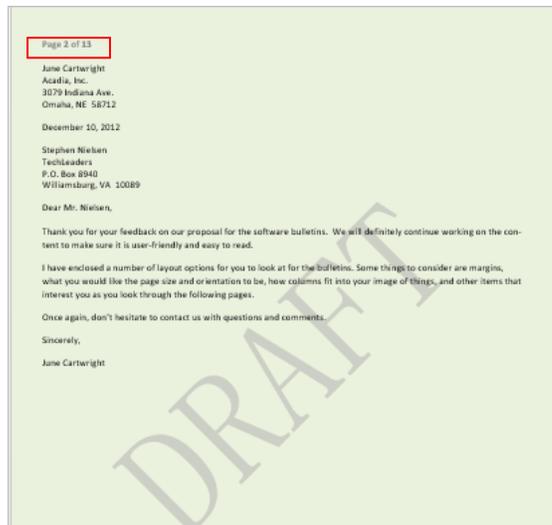


Figure 5-18: The page numbers appear on the page.

✓ Tips:

- ✓ To insert page numbers of your own design or to work with more options in the page headers and footers, refer to the lesson on Using Headers and Footers.
- ✓ To remove page numbers, click the **Page Number** button and select **Remove Page Numbers**.
- ✓ If you like one of the built-in options but want the numbers to appear a little differently, you can change the number format. To modify page numbers, click the **Page Number** button and select **Format Page Numbers**. Select the style of number you want to use from the Page Number Format dialog box.

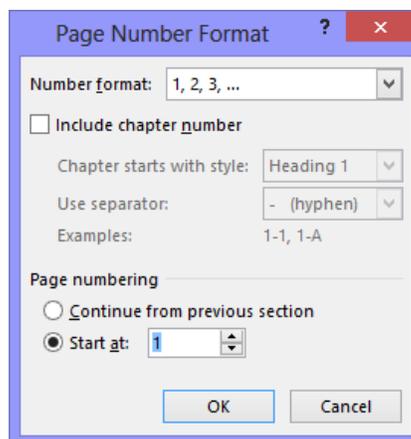


Figure 5-19: The Page Number Format dialog box.

Using Headers and Footers

Documents with several pages often have information—such as the page number, the document’s title, or the date—located at the top or bottom of every page. Text that appears at the top of every page in a document is called a *header*, while text appearing at the bottom of each page is called a *footer*.

Insert a built-in header or footer

1. Click the **INSERT** tab on the Ribbon and click the **Header** or **Footer** button in the Header & Footer group.

A list of built-in options appears. Each option looks different and contains different attributes. For example, some include placeholders for the title and date, while others include cross-references to styles within the document.

✔ **Tip:** Point to a built-in header or footer option to view its attributes and a description of how it might be used best.

2. Select a built-in option to use as a document header or footer.

The header or footer is added to the document.

Create a header or footer

You don’t have to use one of Word’s built-in headers or footers: you can create one of your own.

1. Click the **INSERT** tab on the Ribbon and click the **Header** or **Footer** button in the Header & Footer group.

2. Select **Edit Header** or **Edit Footer** from the list.

The **HEADER & FOOTER TOOLS** tab appears on the Ribbon. Use these commands to work with and insert elements into your headers and footers.

3. Position the insertion point where you want to insert the text or element.

The header and footer areas have the same formatting abilities as the main area of the document. You can use the commands in the **Position** group to help align and position the contents of the header or footer.

Exercise

- **Exercise File:** FormatPage5-10.docx
- **Exercise:** Insert Motion (Even Page) built-in footer to the document.

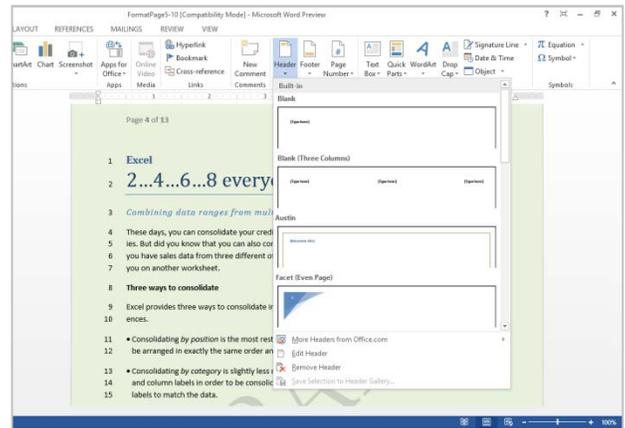


Figure 5-20: The built-in headers and footers are quick, easy, and professionally designed.

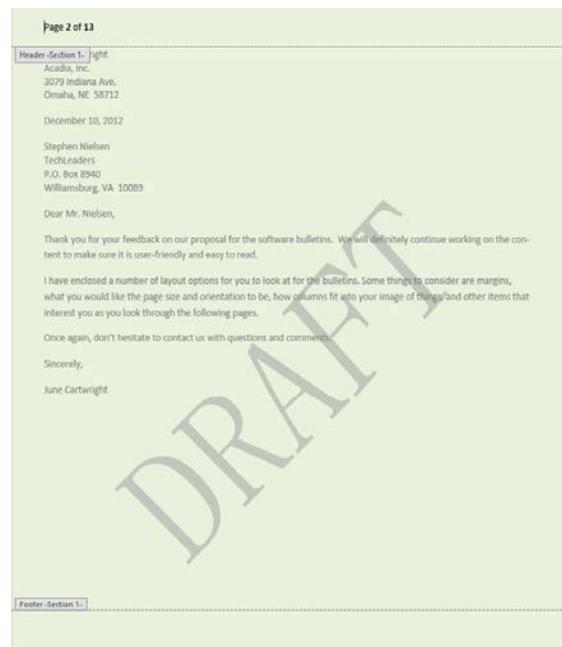


Figure 5-21: The headers and footers.

4. Enter text and/or insert objects using the Insert group of the DESIGN tab under HEADER & FOOTER TOOLS.

When the header or footer looks the way you want it to, close Header and Footer view to resume work on the rest of the document.

Use different headers and footers on odd and even pages

Some built-in headers and footers were made to appear on odd or even pages. To use these headers and footers correctly, or to create your own odd and even-page headers and footers, you must change the page layout.

1. Click the **INSERT** tab on the Ribbon and click the **Header** or **Footer** button in the Header & Footer group.
2. Select **Edit Header** or **Edit Footer** from the list.
The DESIGN tab appears on the Ribbon under HEADER & FOOTER TOOLS.
3. Click the **Different Odd & Even Pages** check box in the Options group.

Other Ways to Apply Different Headers and Footers to Odd and Even Pages:

Click the **PAGE LAYOUT** tab on the Ribbon and click the **Dialog Box Launcher** in the Page Setup group. Click the **Layout** tab and make sure the **Different odd and even** check box is checked.

Trap: When this option is selected, the odd and even pages work independently. So, you must insert a header for the odd pages, and a header for even pages: one header won't work for both.

4. Insert a header or footer on an odd page. Then insert a header or footer on an even page.

When you insert the headers and footers, they are formatted differently on the odd and even pages.

Tips:

- ✓ Built-in headers and footers can be modified.
- ✓ Changes made to the header or footer on a page will change the other headers and footers in that section. Use a document with section breaks to have different headers and footers within the document.

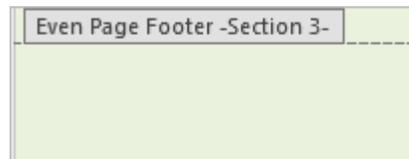
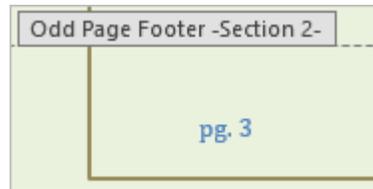


Figure 5-22: Using headers and footers that are different for odd and even pages is a nice option for printed, bound documents.

Table 5-3: Header and Footer Design Tab Groups

Header & Footer	Apply built-in header, footer, and page number options.
Insert	Insert Date & Time, a Picture or Clip Art, or a Quick Part field.
Navigation	Switch between headers and footers and jump to other sections.
Options	Apply a different header or footer to the first page in a section, different odd & even pages, and choose to show document text.
Position	Choose how far away from the margins you want the headers and footers to appear, and control header and footer alignment.

- ✓ Use the **Go to Header** and **Go to Footer** buttons in the Navigation group to jump between header and footer areas of the document.

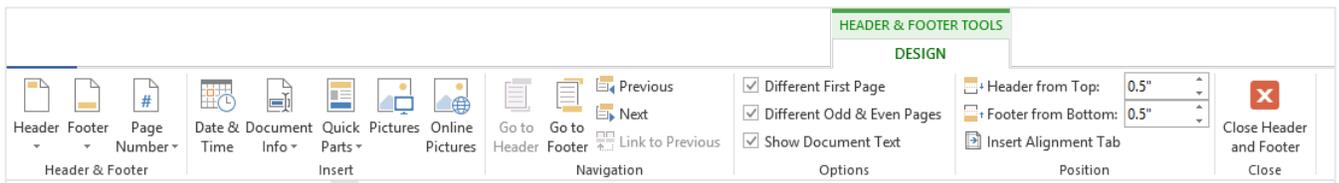


Figure 5-23: The DESIGN tab of HEADER & FOOTER TOOLS.

Formatting the Page Review

Quiz Questions

- 1.
2. Word's default margins are 1 inch at the top and bottom and 1.25 inches at the right and left. (True or False?)
3. What is the correct procedure for adjusting a document's margins?
 - A. Click the Page Layout tab on the Ribbon, click the Margins button in the Page Setup group, and select a margin setting.
 - B. Open the Page Setup dialog box and change the margins in the Margins tab.
 - C. Click and drag the Left Margin or Right Margin line on the Ruler.
 - D. All of these.
4. What is Word's default page orientation?
 - A. Landscape
 - B. Portrait
 - C. Legal
 - D. Perfect
5. Word currently only supports legal and letter sized documents. (True or False?)
6. What is a column break?
 - A. Something you can insert in a column so that the column ends at that point and text jumps to the start of the next column.
 - B. Something that must be inserted before you start using columns.
 - C. A type of column used in tables.
 - D. Any type of break that is longer than 5 minutes.
7. How can you arrange text into multiple columns?
 - A. Click the Table button on the Insert tab and then drag to select the number of columns you want.
 - B. Press <Ctrl> + <C> and enter the number of columns you want into the Columns dialog box.
 - C. Click the Columns button in the Page Layout group of the Page Layout tab on the Ribbon. Then select the number of columns you want.
 - D. You can't do this in Microsoft Word — that's why Microsoft made Publisher!
8. How can you insert a page break?
 - A. Press <Ctrl> + <Enter>.
 - B. Press <Alt> + <Enter>.
 - C. Double-click where you want to insert the break.
 - D. Click the Page Break button on the status bar.
9. You can format a paragraph so that the page will break immediately before it. (True or False?)

10. You can't have different headers and footers, margins, and page orientations, in the same document. (True or False?)
11. There are four different types of section breaks in Word. What is the main difference between them?
 - A. The number of sections that are inserted.
 - B. The page on which the section break is inserted.
 - C. The number of section breaks that can be inserted in the document.
 - D. The page on which the next section begins.
12. Line numbers make it easy to reference lines in a document, such as legal documents or referendums. (True or False?)
13. When should you hyphenate a document?
 - A. When you want to make it difficult for people to read a document.
 - B. When a lot of text has to appear in a small amount of space, such as when using columns.
 - C. When you want to use a lot of really long words.
 - D. When you don't want to use other punctuation.
14. Page borders can only be applied to the entire document. (True or False?)
15. Word prints the page with the background color you select for the document. (True or False?)
16. How could you use a watermark in a document?
 - A. As a design effect, like watercolor art.
 - B. To indicate the relationship between a table and chart.
 - C. As a ring for a coffee cup.
 - D. To indicate that the document is confidential.
17. Word's built-in cover pages have placeholders where you can fill in information about the document. (True or False?)
18. Which of the following is NOT a location where you can insert a page number?
 - A. Page margin
 - B. Bottom of page
 - C. Middle of page
 - D. Top of page
19. What is the procedure for adding a header or footer to a document?
 - A. Click the Insert tab on the Ribbon and click the Header or Footer button in the Header & Footer group.
 - B. Click the Header or Footer button on the Quick Access Toolbar.
 - C. Double-click the header or footer and select the built-in header or footer you want to use from the content control.
 - D. Click the Header & Footer tab on the Ribbon and click the Header or Footer button in the Header & Footer group.
20. Word's built-in headers and footers are the only way to use headers and footers in a document. (True or False?)

Quiz Answers

- 1.
2. False. The default margins in Word 2013 are 1 inch on each side of the page.
3. D. All of these are ways to adjust margins in a document.
4. B. By default, Word documents use Portrait orientation.
5. False. Word supports many different paper sizes.
6. A. A column break is something you can insert in a column so that the column ends at that point and text jumps to the start of the next column.
7. C. To arrange text into multiple columns, click the Columns button in the Page Layout group of the Page Layout tab on the Ribbon. Then select the number of columns you want.
8. A. Pressing <Ctrl> + <Enter> is one way to insert a page break.
9. True. You can do this by applying the Page break before paragraph format.
10. False. You can use different page formatting in the same document so long as you use section breaks.
11. D. The difference between section breaks is in where the next section begins. For example, an Odd Page section break starts the next section on an odd page. A Next Page section break starts the next section on whatever the next page is.
12. True.
13. B. Hyphenation is a good way to fit a lot of text has to appear in a small amount of space, such as when using columns.
14. False. You can apply page to the entire, or only to certain sections of the document.
15. False. The colored background of a page only appears electronically, it does not print.
16. D. Watermarks are usually used to indicate the document should be treated specially, such as to indicate that it is confidential.
17. True. The built-in cover pages and placeholders make it easy to make your document look professionally designed.
18. C. You can insert page numbers in the top, bottom, or side margins of the page, but not the middle.
19. A. To insert a header or footer, click the Insert tab on the Ribbon and click the Header or Footer button in the Header & Footer group.
20. False. You can edit built-in headers or footers, or you can create your own headers and footers.

Working with Themes and Styles

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This chapter covers formatting features that can save you tons of time as you create and format documents.

First, we'll learn all about styles. A style is a set of character and paragraph formats stored under a name. Styles are useful because you can apply a whole group of formatting options in a single step. If you decide to change the formatting options of a style, every character or paragraph formatted with that style is automatically updated with the new formatting options, instead of having to go through the document and manually update each and every paragraph. Styles are rather abstract, so don't worry if you still don't understand them—they will make more sense after you work with them.

The final lessons in the chapter talk about document themes, a great way to make your documents look cohesive and professionally designed.

Using Exercise Files

Exercise files are provided so users can practice the topic(s) covered in each lesson. There are two ways you may use the exercise files:

- Open the exercise file for a lesson and perform the lesson exercise. Close the exercise file.
- Open the exercise file for a lesson and perform the lesson exercise. Keep the file open and perform the exercise for the following lesson and so on for the remainder of the chapter.

The exercises are written so that you may “build upon them”, so the exercises in a chapter can be performed in succession from the first lesson to the last.

Applying a Style

A style is a group of format settings stored under a single name. Styles are sets of styles that are designed to work together to create attractive and professional looking documents.

Each set of styles includes all the styles you need to build a document. For example, you can apply the “Quote” style if you are quoting something in a document, or the “Title” style for the document’s main heading. Using quick styles rather than your own formatting has several advantages:

- The document looks professional and is easy to read.
- Styles provide consistency and can apply several formatting properties at one time.
- If you change the formatting properties of a style, all instances of the style are updated with the formatting changes.

Apply a style

Choose a style that is appropriate for the text, and then apply the style.

1. Select the text to which you want to apply the style.
2. Click the **HOME** tab on the Ribbon and click the style you want to use in the Styles Gallery in the Styles group.

The style is applied to the document. To view all the styles in the quick style set at the same time, click the **More** button to expand the group.

- ✔ **Tip:** If the style that you want does not appear in the Styles Gallery, press **<Ctrl> + <Shift> + <S>** to open the Apply Styles task pane. Under Style Name, type the name of the style you want to use.

Apply a different Style Set

Word’s built-in style sets are professionally designed to convey a certain tone. Want your document to look more formal? Use the Formal style set, and the styles will take on formatting properties that make text look more formal.

! Trap:

Styles need to first be applied in order for the Style Set Preview to display correctly, e.g. If you have not applied Heading 1 of a style to all your main headings, no change will be visible to your document until you apply the new Style Set’s Heading 1 to all your main headings.

1. Click the **DESIGN** tab on the Ribbon.

Exercise

- **Exercise File:** Management6-1.docx
- **Exercise:** Apply the Title style to the “Annual Management Meeting” text.
Apply the Subtitle style to the “Seminar Schedule” text.
Apply the Basic (Elegant) style set to the document.
Reset document styles.

Click a style in the Style Gallery to apply it to text. The current style is highlighted.



Use these buttons to view other styles in the current style set.

Figure 6-1: The Styles Gallery in the HOME tab of the Ribbon.

Table 6-1: Style Sets in Word 2013

Minimalist	Black and White (Classic)
Basic (Stylish)	Basic (Elegant)

Working with Themes and Styles

2. Select a Style Set from the Style Set Gallery in the Document Formatting group.

✓ **Tip:** As you point to different styles in the Style Set Gallery, the document changes to show you how it will look with the style set. For larger documents, it may take a bit longer to process the preview.

Reset Style Sets

If you decide that you don't want to use the Style Set you applied to the document, you can remove it and reset to its default settings.

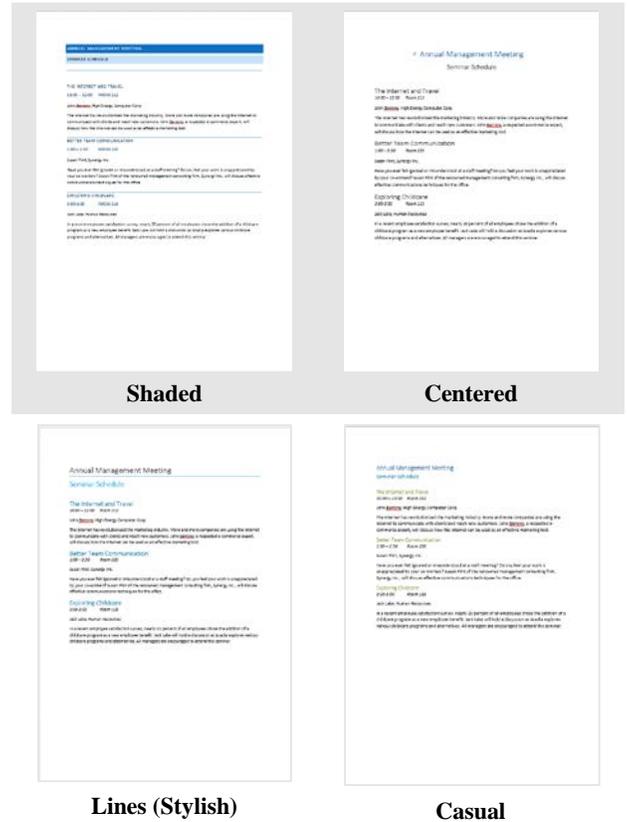
1. Click the **DESIGN** tab on the Ribbon and click the Style Set Gallery's **More** button in the Document Formatting group.

2. Click **Reset to the Default Style Set**.

The style set will reset accordingly.

✓ **Tips:**

- ✓ Microsoft recognizes that styles are efficient and useful in creating a document, so they have created sets of coordinating styles that have all the styles you need to build a document. In previous versions, users were left to create most of their own styles from scratch. Now, styles are very accessible with a wide range of them prominently displayed on the Ribbon.
- ✓ In most cases, choosing a different style set does not change the font type or the font theme being used; it just applies different character or paragraph formatting.



Creating a Style

A style is a group of format settings stored under a single name. Styles save a lot of time and ensure that your documents are formatted in a consistent manner. There are five different types of styles:

- **Character:** Includes any type of character formatting, such as font size or type, colors, and font effects.
- **Paragraph:** Includes any type of paragraph formatting, such as paragraph, tab, border, and bullets and numbering formats.
- **Linked:** A combination of character and paragraph formatting properties.
- **Table:** Provides a consistent style for all borders, shading, alignment and fonts in tables.
- **List:** Applies similar alignment, numbering or bullet characters and fonts to lists.

With Word’s Style Sets, you probably won’t need to create new styles very often. But if the need arises, creating a style is quick and easy.

1. Select the text that contains the formatting of the new style.
2. Highlight the selection, click **Styles**, and select **Create a Style** from the mini toolbar.
3. Click **Modify**.

The Create New Style from Formatting dialog box appears. You may add formatting or change formatting properties for the style here.

4. Click the **Name** text box and enter the style’s name.
5. Click **OK**.

The style is added to the Quick Style Gallery.

- **Other Ways to Create a Style:** Click the **HOME** tab and click the **Dialog Box Launcher** in the Styles group. Click the **New Style** button in the Styles task pane and apply style formatting in the Create New Style from Formatting dialog box. Give the style a name and click **OK**.

Exercise

- **Exercise File:** Management6-2.docx
- **Exercise:** Select “The Internet and Travel” line; add bold formatting and change the font size to 14 pt. Create a style named “Seminar” based on this text. Apply the style to the “Better Team Communication” and “Exploring Childcare” text.

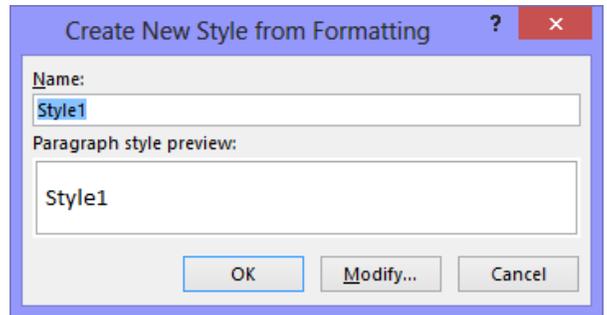


Figure 6-2: To create a new style from formatted text, just give the style a name.

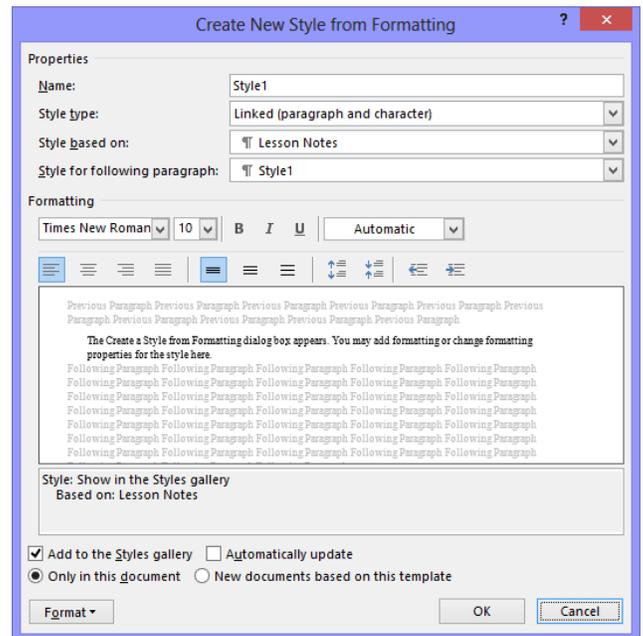


Figure 6-3: Create a new style and add formatting properties to it in this dialog box.

Modifying and Deleting a Style

If a style doesn't quite have the formatting attributes you would like, or if you created a style that you no longer want to use, styles are easily modified and deleted.

Modify a style

In most cases you won't need to change a style in a Style Set because the styles are designed to work together. Rather than modifying one of these built-in styles, you may want to consider creating a new style. Still, you may run into a situation where you want to modify a built-in style or a style that you've created.

1. Select text that uses the style you want to modify.
2. Apply the formatting you want to add to or remove from the style.
3. Right-click the style in the Styles Gallery and select **Update [style name] to Match Selection** from the contextual menu.

The style is modified to acquire the formatting properties of the selected text.

Other Ways to Modify a Style:

Right-click the style in the Styles Gallery and select **Modify** from the contextual menu. Or, click the **Dialog Box Launcher** in the Styles group, click the list arrow for the style you want to modify and select **Modify**. Edit the formatting of the style in the Modify Style dialog box.

Delete a style

If a style is no longer needed, it may be deleted altogether.

1. Click the **Dialog Box Launcher** in the Styles group.
The Styles task pane appears.
2. Click the **list arrow** of the style you want to delete and select **Delete [style name]** from the list.

A dialog box appears, asking to confirm deletion of the style.

Tip: If there is no option to delete the style, Word may instruct you to revert to a similar style, which effectively deletes the style.

3. Click **Yes**.

The style is deleted and the default "Normal" style, or a style similar to the deleted style, is applied.

Exercise

- **Exercise File:** Management6-3.docx
- **Exercise:** Modify the "Seminar" style so the font size is 11 pt. Notice that the other instances of the style are modified.
Delete the "Seminar" style.

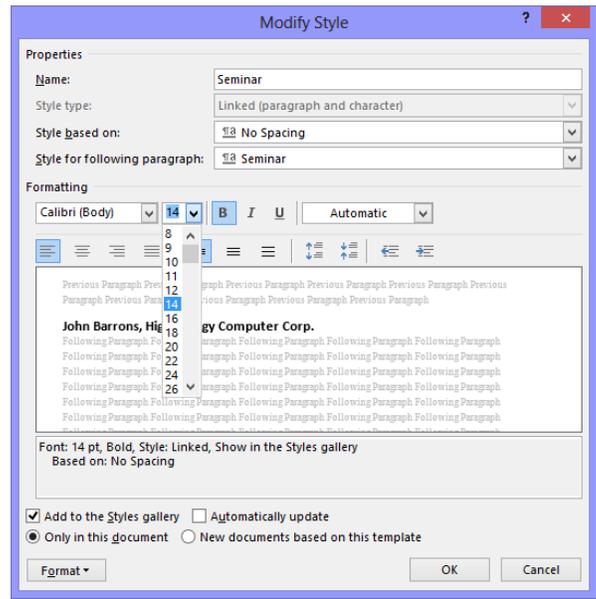


Figure 6-4: The Modify Style dialog box.

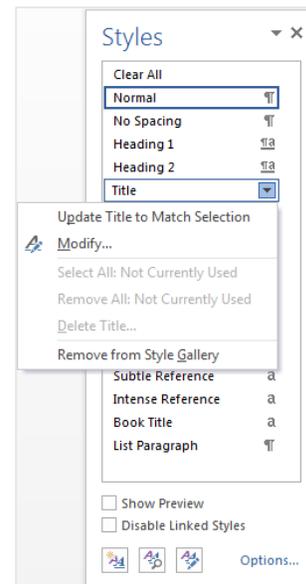


Figure 6-5: If a style is very similar to another style, you may be asked if you want to revert to that style rather than delete the style.

Working with the Styles Gallery

The Styles Gallery makes it easy to view and access styles in a document. This lesson shows you how to organize which styles are displayed in the Styles Gallery.

Add a style to the Styles Gallery

If a style you want to use doesn't appear in the Styles Gallery, you can move it into the Styles Gallery so it is easily accessible.

1. Click the **HOME** tab on the Ribbon and click the **Dialog Box Launcher** in the Styles group.
The Styles task pane appears.
2. Click the **Options** link in the Styles task pane.
The Style Pane Options dialog box appears.
3. Click the **Select styles to show** list arrow and select **All styles**. Click **OK**.
The Styles task pane displays all the styles available in the document.
4. Point at the style you want to add to the Styles Gallery. Click the list arrow and select **Add to Style Gallery**.
The style appears at the beginning of the Styles Gallery.

Remove a style from the Styles Gallery

Removing a style from the Styles Gallery does not remove the style from the document.

1. Click the **HOME** tab on the Ribbon and right-click the style that you want to remove from the Styles Gallery in the Styles group.
2. Select **Remove from Style Gallery** from the contextual menu.
This will remove the style from the gallery, but it will still be available in the document.

Exercise

- **Exercise File:** Management6-4.docx
- **Exercise:** Remove the "List Paragraph", "Book Title" and "Emphasis" styles from the Styles Gallery. Move the "Book Title" style back into the gallery.

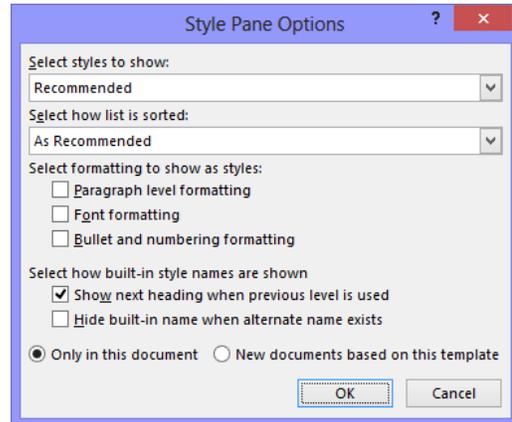


Figure 6-6: Configure how the Style Pane works in the Style Pane Options dialog box.

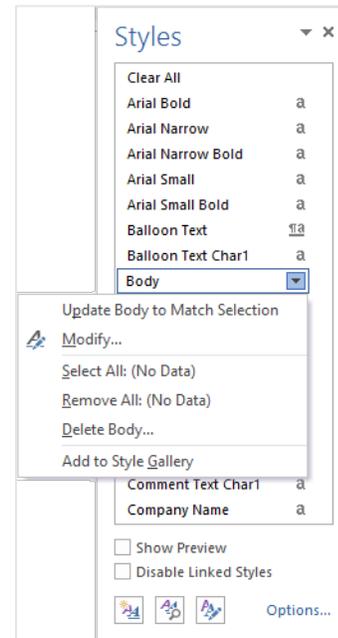


Figure 6-7: Make styles quickly accessible by adding them to the Style Gallery.

Creating a New Style Set

If you create a group of styles in a document that you would like to use together, you can save them as a new Style Set.

To create a new style set, you can use a combination of styles you have created, and styles from other style sets.

1. Once you're happy with your formatted document, click the **DESIGN** tab on the Ribbon; then click the **More** button list arrow in the Document Formatting group.

2. Select **Save as a New Style Set**.

The Save as a New Style Set dialog box appears.

3. Click the **File name** text box and enter a name for the new Style Set.

If you create other customized elements, use the same naming scheme so you can easily identify which parts are designed to go together.

4. Click **Save**.

The new Style Set now also appears in the Style Sets Gallery.

Exercise

- **Exercise File:** Management6-5.docx
- **Exercise:** Create a new style set named "Management".

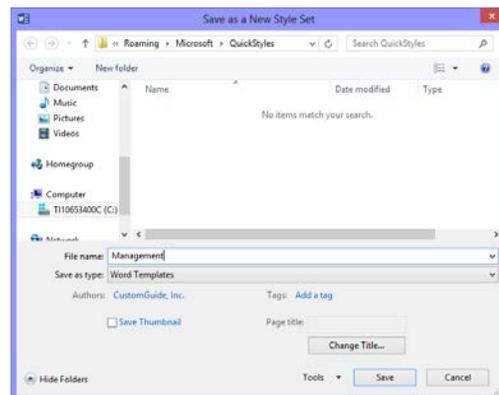


Figure 6-8: The Save Style Set dialog box.

Selecting, Removing, and Printing Styles

Styles form a bond between texts that uses the same style. Use this common bond to work with text.

Tip:

- ✓ You must turn on the **Keep track of formatting** option to select, remove, or print styles. To do this, click the **FILE** tab and select **Options**. Click the **Advanced** tab and make sure the **Keep track of formatting** check box is selected.

Select text that uses the same style

You can select all occurrences of a style in a document.

1. Click the **HOME** tab on the Ribbon and right-click the style in the Styles Gallery in the Styles group.
2. Click **Select All (number of) Instance(s)**.

When the text is selected, you can work with the text as usual, such as to apply a different style, modify the style, or add formatting.

Remove a style from text

If you change your mind about using a style, you can easily remove the style from all text in the document.

1. Click the **HOME** tab on the Ribbon and click the **Dialog Box Launcher** in the Styles group.
The Styles task pane appears.
2. Click the **list arrow** for the style you want to remove and select **Clear Formatting of (number of) Instance(s)**.
The style is removed from text in the document.

Print styles

You can print a summary of all the styles in a document, which includes a description of each style's properties and settings.

1. Click the **FILE** tab and select **Print**.
The Print tab appears.
2. Click the **Print all pages** list arrow and select **Styles**.
3. Click **Print**.

Exercise

- **Exercise File:** Management6-6.docx
- **Exercise:** Apply the Strong style to “The Internet and Travel” and “Better Team Communication” lines. Select all instances that use the Strong style and add underline formatting to them. Remove all instances of the Strong style. Print a style summary for the document.

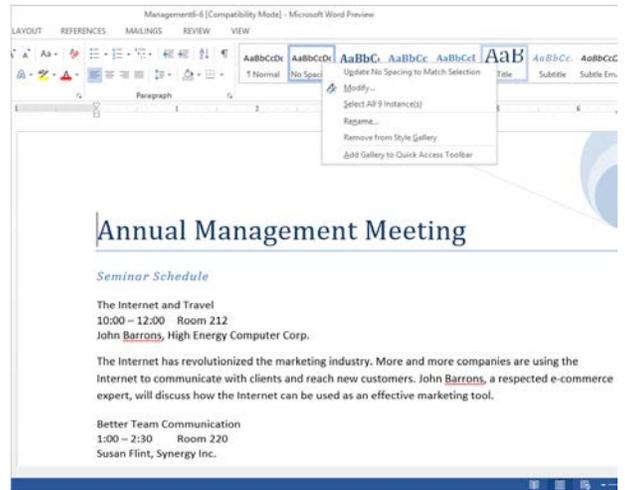


Figure 6-9: Select all text that is formatted using a certain style in the document.

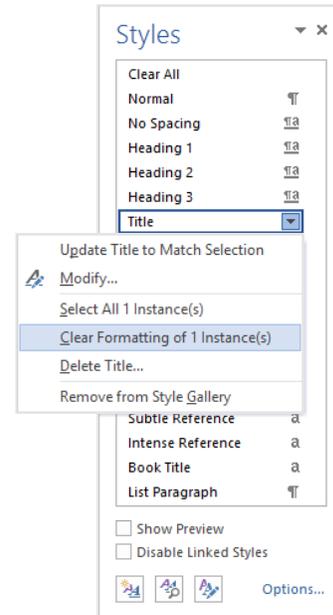


Figure 6-10: Remove the style from all text to which it has been applied.

Comparing and Cleaning Up Styles

The Style Inspector helps identify styles and other formatting in the document.

Clean up styles

If text isn't updating to style changes the way you expected, or if text is not included in a style selection as you anticipated, it may not be formatted with a style.

1. Click the **HOME** tab on the Ribbon and click the **Dialog Box Launcher** in the Styles group.

The Styles task pane appears.

2. Click the **Style Inspector** button in the Styles task pane.

The Style Inspector appears.

3. Click the text you want to check or clean up.

The Style Inspector shows the underlying paragraph and character styles that are used in the current text.

The Plus areas below the paragraph or text level references other formatting properties that have been added manually and are not part of the underlying style.

4. Use the controls in the Style Inspector to clear all styles and formatting, create a new style, or reveal formatting.

Compare formatted text to other formatted text

Comparing text makes it easier for you to identify the formatting attributes applied to text.

1. Click the **HOME** tab on the Ribbon and click the **Dialog Box Launcher** in the Styles group.

The Styles task pane appears.

2. Click the **Style Inspector** button in the Styles task pane.

The Style Inspector appears.

3. Click the **Reveal Formatting** button.

The Reveal Formatting task pane appears.

Exercise

- **Exercise File:** Management6-7.docx

- **Exercise:** Apply the Intense Reference style to the “Exploring Childcare” line.

Use the Style Inspector to check the formatting of the “Better Team Communication” line.

Compare the text of the “Better Team Communication” line and the “Exploring Childcare” lines.

Apply the Intense Reference style to the “The Internet and Travel” and “Better Team Communication” lines.

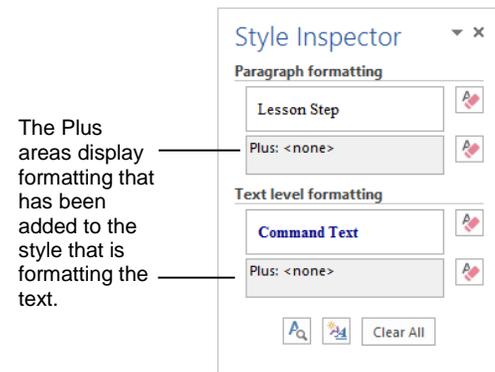


Figure 6-11: Use the Style Inspector to investigate formatting differences in text.

Working with Themes and Styles

- Click or select text to view its formatting.

The formatting properties of the selected text are displayed in the Reveal Formatting task pane.

- Click the **Compare to another selection** check box in the Reveal Formatting task pane.

Now you can compare the formatting of the selected text to other text in the document. Notice that when the text is compared to itself, there are no formatting differences.

- Click or select the text to compare to the previously selected text.

The formatting differences between the two instances are displayed in the Reveal Formatting task pane.

- Close the Reveal Formatting task pane and Style Inspector when you are finished.

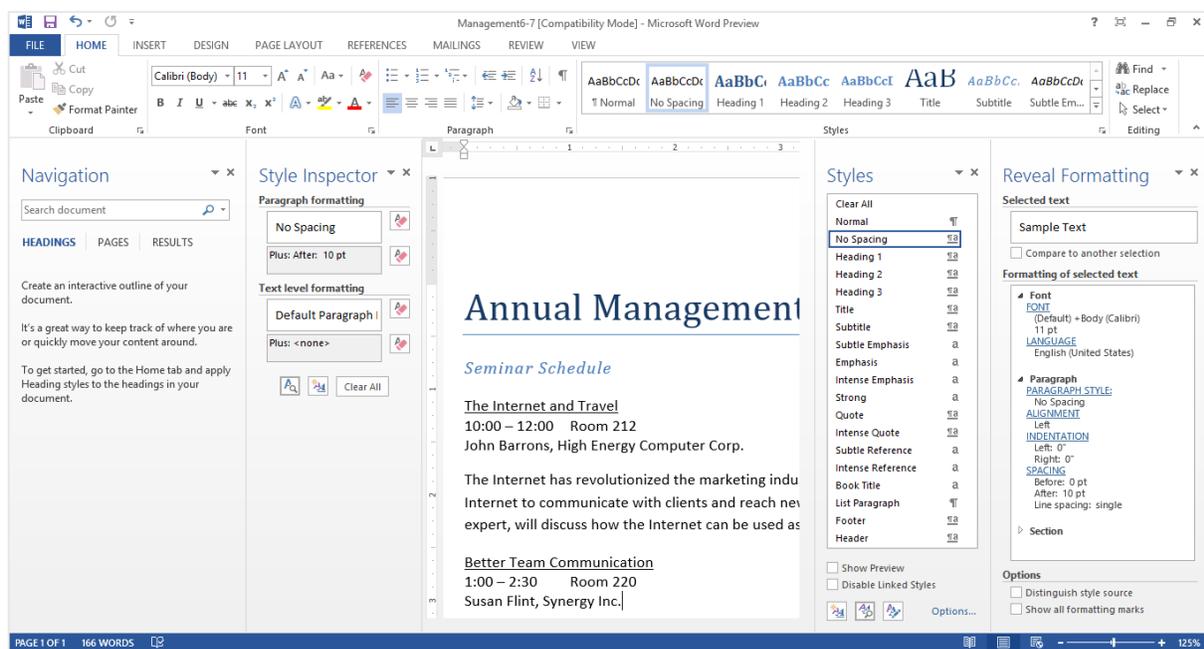


Figure 6-12: The Reveal Formatting task pane displays formatting differences between text selections in the document.

Applying Document Themes

Word 2013’s document themes provide a consistent and professional look for your documents. Each document theme consists of three design elements:

- **Theme Colors:** A set of eight coordinated colors used in formatting text and objects in the document.
- **Theme Fonts:** A set of coordinated heading and body font types.
- **Theme Effects:** A set of coordinated formatting properties for shapes and objects.

Tip:

- ✓ Document themes work best when saved in .docx files. They may not display correctly in .doc format.

Apply a document theme

Applying a document theme affects all elements of the document: colors, fonts, and effects.

1. Click the **DESIGN** tab on the Ribbon and click the **Themes** button in the Document Formatting group.

A list of built-in document themes appears. The default theme is “Office,” which is highlighted in orange.

- ✓ **Tip:** If the theme you want to use doesn’t appear in the list, it may be saved somewhere else. If a theme is saved elsewhere on your computer or network location, click **Browse for Themes** to go to the theme’s location.

2. Select the document theme you want to apply.

The formatting associated with the document theme is applied to the document.

Mix and match document themes

You are not bound to the colors, fonts, or effects that are assigned to a document theme. You may mix and match theme colors, theme fonts, and theme effects.

1. Click the **DESIGN** tab on the Ribbon.
2. Click the **Theme Colors**, **Theme Fonts**, or **Theme Effects** buttons in the Document Formatting group and select the colors, fonts, or effects that you want to use.

The change is applied to the document. The document theme isn’t changed, but it is no longer applied.

Exercise

- **Exercise File:** Management6-8.docx
- **Exercise:** Apply the “Integral” document theme. Apply the “Franklin Gothic” theme font.

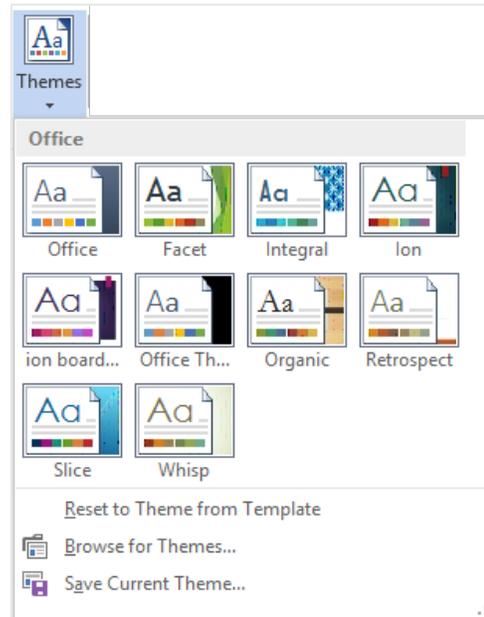


Figure 6-13: The built-in list of Document Themes in Word coordinates colors, fonts, and shape effects.

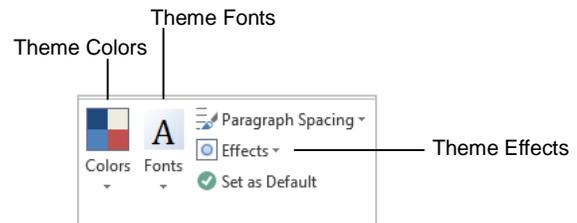


Figure 6-14: Customize a document theme by mixing and matching colors, fonts, and effects.

Creating New Theme Colors and Fonts

You will probably be able to find a document theme that suits your needs among Word's built-in options. However, you can also create your own customized theme colors and fonts.

1. Click the **DESIGN** tab on the Ribbon and click the **Theme Colors** or **Theme Fonts** buttons in the Document Formatting group.

2. Select **Customize Colors** or **Customize Fonts** from the list.

A dialog box appears where you can select the colors or fonts you want to use.

3. Select the colors or fonts you want to use.
4. Click the **Name** text box and type a name for the new color or font theme.

If you want to coordinate new theme colors and fonts, save them under the same name, just as they are with built-in themes.

5. Click **Save**.

If you want to use the new colors and fonts together, save them under the same name so that it is easy to identify that they go together.

✓ Tips:

- ✓ You can't create your own theme effects. You can only create your own theme colors and fonts.
- ✓ You can delete or edit custom theme colors or fonts. Select the **DESIGN** tab, click on **Theme Colors** or **Theme Fonts** buttons. Right-click a custom color or font and select **Delete** or **Edit**.

Exercise

- **Exercise File:** Management6-9.docx
- **Exercise:** Create a new theme color named "Acadia".

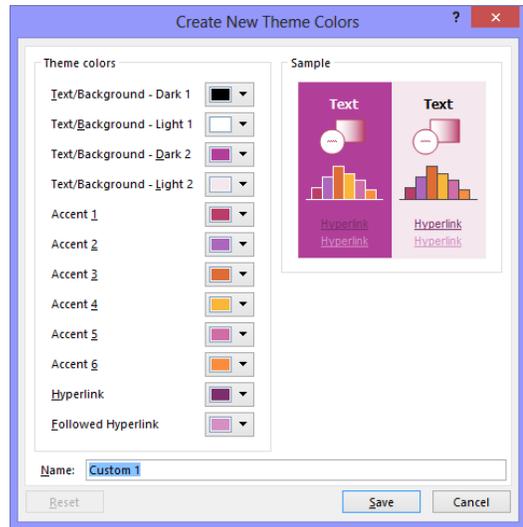


Figure 6-15: Creating a new theme color.



Figure 6-16: Theme elements that you have created appear in a special Custom section at the top of the list.

Save a New Document Theme

You can use theme fonts or colors that you have created to create an entire document theme. For example, you could create a document theme that uses specific colors and fonts for your organization.

You can save any combination of theme colors, theme fonts, and theme effects as a new document theme.

1. Apply the theme colors, fonts, and effects that you want to use in the new document theme to the document.

This can be a combination of items you have created, and built-in items.

2. Click the **DESIGN** tab on the Ribbon and click the **Themes** button in the Document Formatting group.

A list of built-in themes appears.

3. Select **Save Current Theme**.

The Save Current Theme dialog box appears.

When you give the new document theme a name, use a naming scheme similar to other items, such as the theme colors or fonts, so that it is easy to identify that they go together.

4. Click the **File name** text box, enter a name, and click the **Save** button.

The document theme is now available under the Themes button in the Themes group.

✓ Tips:

- ✓ When you save a new document theme, it becomes available in all Office programs.
- ✓ You can delete custom themes. Select the **DESIGN** tab, click the **Themes** button in the Document Formatting group, right-click on the custom theme and select **Delete**.

Exercise

- **Exercise File:** Management6-10.docx
- **Exercise:** Apply the custom Acadia theme color to the document.

Save a new document theme named “Acadia”.

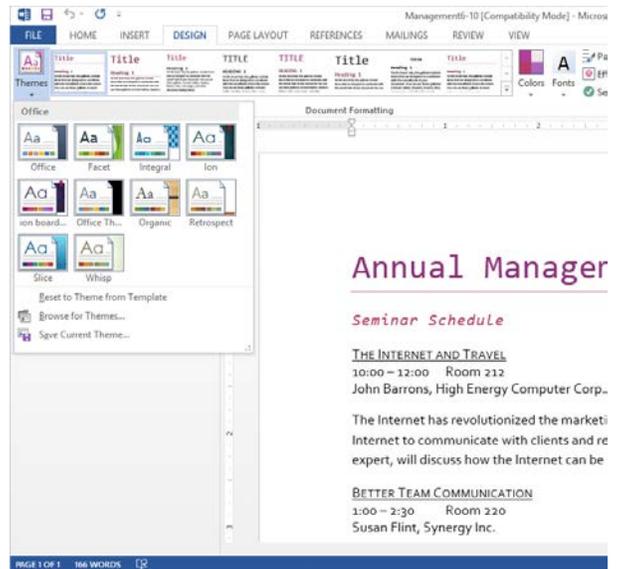


Figure 6-17: You can save your combination of theme colors, fonts, and effects as a new document theme.

Working with Themes and Styles

Review

Quiz Questions

- 1.
2. If you decide that you don't want to use the style set that you applied to the document, you can reset document styles.
3. Which of these keystroke combinations opens the Apply Styles task pane?
 - A. <Shift> + <S>
 - B. <Ctrl> + <Shift> + <A>
 - C. <Shift> + <A>
 - D. <Ctrl> + <Shift> + <S>
4. The easiest way to create a style in Microsoft Word is to:
 - A. Base the style on an existing paragraph's formatting.
 - B. Create a style from scratch.
 - C. Use the Styles task pane.
 - D. Click your heels and think really hard.
5. As soon as a style has been modified, all instances of the style in the document are updated to reflect the changes.
6. If you aren't given the option to delete a style, Word may instruct you to:
 - A. Revert to a similar style.
 - B. Modify the style.
 - C. Hide the style.
 - D. Remove the style from the Styles Gallery.
7. Removing a style from the Styles Gallery removes the style from the document. (True or False?)
8. Any styles that appear in the Styles Gallery will be included in the new style set. (True or False?)
9. You can't select all of the text in a document that uses the same style. (True or False?)
10. A printed styles summary does NOT include:
 - A. A list of all styles used in the document.
 - B. A description of each style's properties.
 - C. A list of commonly used styles.
 - D. A description of each style's settings.
11. To see how text is formatted click the _____ button in the Style Inspector.

- A. Show Formatting
 - B. Reveal Formatting
 - C. Illustrate Formatting
 - D. Document Formatting
12. You can compare formatted text to other formatted text in Word 2013. (True or False?)
13. Which of the following is not a design element that document themes consist of?
- A. Theme Colors
 - B. Theme Alignment
 - C. Theme Fonts
 - D. Theme Effects
14. What is the default theme used in Word?
- A. Office
 - B. Opulent
 - C. Apex
 - D. Civic
15. You can create your own theme effects in Word 2013. (True or False?)
16. When you save a new document theme, it becomes available in all Office programs. (True or False?)
17. You can't remove a custom document theme in Word once you have added one. (True or False?)

Quiz Answers

- 1.
2. True. If you decide that you don't want to use the style set that you selected, you can reset document styles.
3. D. Press <Ctrl> + <Shift> + <S> to open the Apply Styles task pane.
4. A. The easiest way to create a style in Microsoft Word is to base it on an existing paragraph's formatting.
5. True. As soon as a style has been modified, all instances of the style in the document are updated to reflect the changes.
6. A. If you aren't given the option to delete a style, Word may instruct you to revert to a similar style.
7. False. Styles that are removed from the Styles Gallery are still available, they just are not shown in the Styles Gallery.
8. True. Any styles that appear in the Styles Gallery will be included in the new style set, so make sure to edit the gallery as necessary.
9. False. You can select all of the text in a document that uses the same style.
10. C. A printed styles summary does NOT include a list of commonly used styles.
11. B. To see how text is formatted click the Reveal Formatting button in the Style Inspector.
12. True. Using the Style Inspector, you can compare formatted text to other formatted text in Word 2013.
13. B. Theme Alignment is not a design element used in Word.
14. A. Office is the default theme used in Word.

15. False. You can't create your own theme effects. You can only create your own theme colors and fonts.
16. True. Once a document theme is saved, it becomes available in all Office programs.
17. False. To remove a custom document theme, click the Themes button, right-click the custom theme, select Delete, and click Yes to confirm the deletion.

Working with Shapes and Pictures

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Documents that include pictures, drawings, and graphics can be much more compelling and effective than documents that only contain boring text. Once you know how to work with pictures and graphics, you can make all kinds of neat documents, such as newsletters, greeting cards, and pamphlets.

This chapter explains how to use Word’s drawing tools to insert shapes and text boxes in your documents; how to insert pictures and clip art; and how to format pictures, shapes, and clip art.

Using Exercise Files

This chapter suggests exercises to practice the topic of each lesson. There are two ways you may follow along with the exercise files:

- Open the exercise file for a lesson, perform the lesson exercise, and close the exercise file.
- Open the exercise file for a lesson, perform the lesson exercise, and keep the file open to perform the remaining lesson exercises for the chapter.

The exercises are written so that you may “build upon them”, meaning the exercises in a chapter can be performed in succession from the first lesson to the last.

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Inserting Clip Art

Clip art is a collection of pictures and graphics that Microsoft has included with Word.

1. Click the **INSERT** tab on the Ribbon and click the **Online Pictures** button in the Illustrations group.

The Insert Pictures dialog box appears.

! **Trap:** Depending on how Word is installed and configured on your computer, an error message may appear, informing you that the clip art feature has not been installed. Try inserting the Office 2013 CD-ROM.

2. Type the name of what you're looking for in the search text box.
3. Click the **search** button (🔍).
4. Scroll through the clip art until you find a file that you like.
5. Click the clip art that you want to insert.
6. Click **Insert**.

The Office.com Clip Art dialog box closes.

✓ Tip:

- ✓ A little star in the bottom-right corner of a graphic indicates animation.

📖 Exercise

- **Exercise File:** American History7-1.docx
- **Exercise:** Insert an image of a lighthouse on page 6 under the last paragraph.

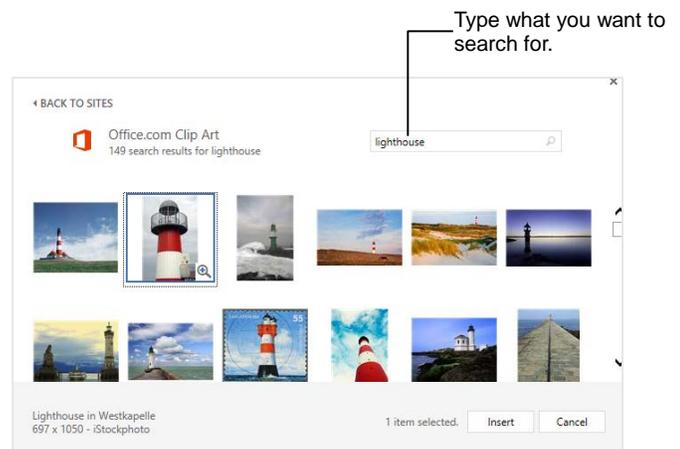


Figure 7-1: The Office.com Clip Art dialog box.

Inserting Screenshots

A screenshot is an image of any visible item you see on your monitor.

Insert a screenshot of an open window

1. Click the **INSERT** tab on the Ribbon and click the **Screenshot** button list arrow in the Illustrations group.

The Available Windows gallery appears.

✔ **Tip:** If a program window is minimized to the taskbar, it will not appear in the Available Windows gallery.

2. Select an image.

The screenshot is inserted into the document.

Insert a screen clipping

Rather than inserting an entire window, use the Screen Clipping tool to take a screenshot of part of the window.

1. Make the window from which you want to take a screen clipping active.

✔ **Tip:** Minimize all programs to the taskbar except for the one from which you want to take a screen clipping.

2. In Word, click the **INSERT** tab on the Ribbon and click the **Screenshot** button list arrow in the Illustrations group.

3. Select **Screen Clipping**.

The Word window minimizes to the taskbar, the desktop fades, and the cursor changes to a crosshair.

4. Move the cursor to the corner of the area you want to clip.

✔ **Tip:** To cancel a screen clipping, press the **<Esc>** when the screen clipping screen is active.

5. Click and drag the cursor around the area you want to clip, and then release it.

The screen clipping is inserted into the document.

Exercise

- **Exercise File:** American History7-2.docx and <http://en.wikipedia.org>
- **Exercise:** Look up Mount Rushmore in Wikipedia. Take a screen clipping of the Mount Rushmore picture and insert it on page 2 next to the bulleted section.

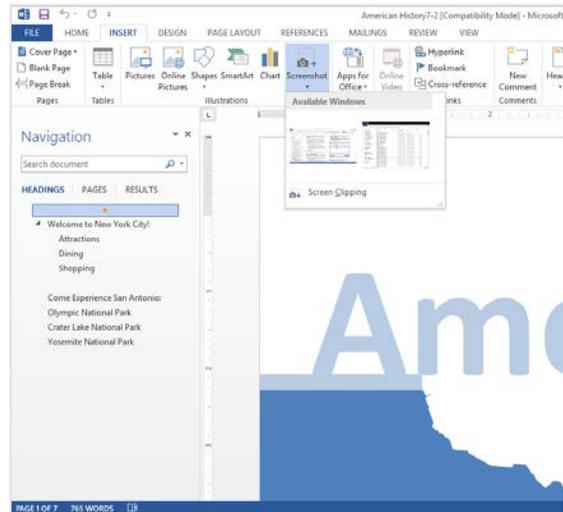


Figure 7-2: The Screenshot gallery is populated with thumbnails of all open program windows.



Figure 7-3: A Screen clipping in progress.

Inserting Pictures and Graphics Files

In addition to inserting clip art into a document, you can also insert pictures or graphics that you have on file—such as pictures uploaded from a digital camera or graphics created in another program.

1. Click the **INSERT** tab on the Ribbon and click the **Pictures** button in the Illustrations group.

The Insert Picture dialog box appears.

2. Navigate to the file you want to insert.
3. Click the name of the file that you want to insert and click **Insert**.

The picture is inserted into the document as ‘In line with text’, and the **FORMAT** contextual tab appears on the Ribbon under **PICTURE TOOLS**.

✓ Tips:

- ✓ If you don’t want the picture to appear ‘In line with text’, you’ll need to adjust its text wrapping in the **Arrange** group.
- ✓ To insert more than one picture or graphics file at a time, press and hold down the **<Ctrl>** key as you click each file in the Insert Picture dialog box.

Exercise

- **Exercise File:** American History7-3docx, Philadelphia.jpg
- **Exercise:** Insert the Philadelphia.jpg image located in the Practice folder under the last paragraph on page 4.

Table 7-1: Supported Graphics File Formats

Graphics Interchange Format	.gif, .gfa
JPEG File Interchange Format	.jpeg, .jpg, .jfif, .jpe
Microsoft Windows Bitmap	.bmp, .rle, .dib
Portable Network Graphics	.png
Tagged Image File Format	.tiff
Microsoft Windows Metafile	.emf, .wmf
Computer Graphics Metafile	.cgm
Macintosh PICT	.pct
WordPerfect Graphics	.wpg
Encapsulated PostScript	.eps



Figure 7-4: When a graphic is inserted, the **Format** contextual tab appears on the Ribbon by default. These commands allow you to work with and format the selected picture.

Removing a Picture's Background

Word 2013 now has the ability to remove backgrounds from pictures and graphics.

1. Double-click the picture or graphic from which you want to remove the background.

The **FORMAT** tab appears on the Ribbon under **PICTURE TOOLS**.

2. Click the **FORMAT** tab, and select the **Remove Background** button in the Adjust group.

The **BACKGROUND REMOVAL** program tab appears on the Ribbon and the area that will be removed from the picture or graphic appears in purple.

3. Click and drag the sizing handles of the inlaid rectangle around the area you want to keep.

The area identified as the background changes.

It is unlikely that Word will get it exactly right, so you will have to refine the areas to be kept and removed.

4. Click **Mark Areas to Keep** button or the **Mark Areas to Remove** button in the Refine group.

The cursor changes to a pencil.

5. Click and drag the mouse over the areas of the image that you want to keep or remove.

A line is drawn across the area. It changes depending on whether you want to keep it or not.

6. To remove a mark, click the **Delete Mark** button in the Refine group and click on the mark you want to delete.

The mark is removed.

7. When you are finished, click the **Keep Changes** button in the Close group.

The background is removed and Word returns to Print Layout view.

✔ **Tip:** To return the image to its original state, double-click the image, click the **Remove Background** button and click **Discard All Changes**.

✔ **Tip:**

- ✔ Try experimenting with different styles or fills to replace the removed background.

Exercise

- **Exercise File:** American History7-4.docx
- **Exercise:** Remove the background from the image on page 2. Refine as necessary.

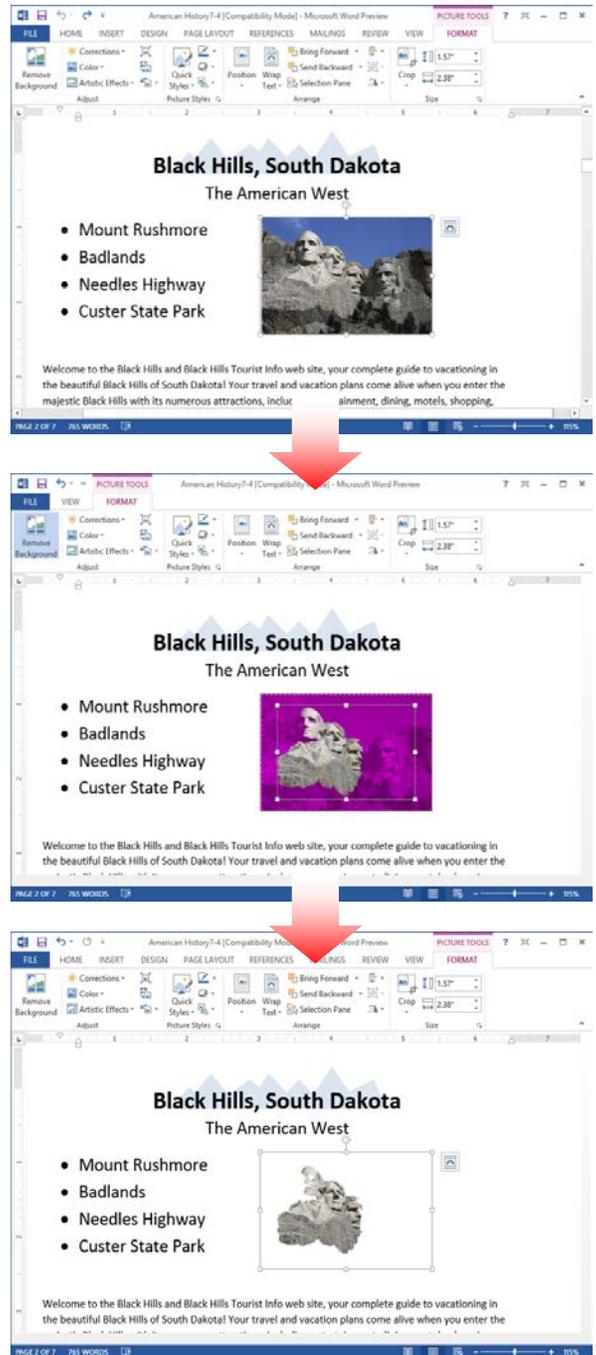


Figure 7-5: Removing the background from a picture.

Altering the Look of Pictures and Graphics

Word 2013 has greatly expanded the user's ability to alter the appearance of pictures and graphics. Now you can easily sharpen or soften an image, change brightness and contrast, adjust coloring, and apply artistic effects.

Apply corrections

Corrections that can be applied include sharpening or softening, and adjusting the brightness and contrast.

1. Double-click the picture or graphic to which you want to apply corrections.

The **FORMAT** tab appears on the Ribbon under **PICTURE TOOLS**.

2. Click the **FORMAT** tab and then select the **Corrections** button in the Adjust group.

A gallery of corrections options appears.

3. Select a correction option from the gallery.

The picture or graphic corrected accordingly.

- ✔ **Tip:** To preview how the correction will change your picture or graphic, briefly hold the mouse over the correction option.

Adjust color

When you adjust color, you can change the color saturation, color tone, or simply re-color the image.

1. Double-click the picture or graphic for which you want to adjust color.

The **FORMAT** tab appears on the Ribbon under **PICTURE TOOLS**.

2. Click the **FORMAT** tab and select the **Color** button in the Adjust group.

A gallery of color options appears.

3. Select a color option from the gallery.

The picture or graphic is re-colored accordingly.

- ✔ **Tip:** To preview how the color adjustment will change your picture or graphic, briefly hold the mouse over the color option

Apply artistic effects

Perhaps the most interesting new feature for image adjustment is the ability to apply artistic effects. You can

Exercise

- **Exercise File:** American History7-5.docx
- **Exercise:** Apply the Temperature: 8800K Color Tone to the picture on page 2.
Apply the Marker artistic effect.

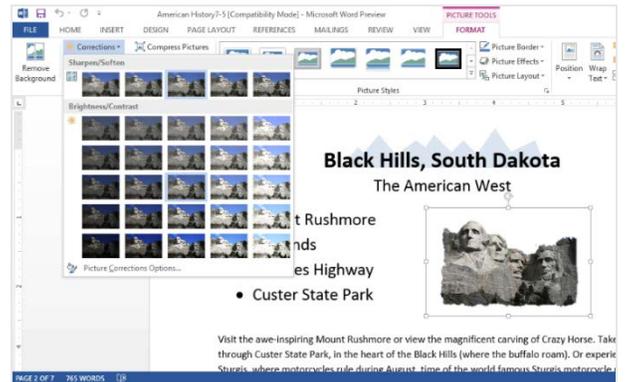


Figure 7-6: The Corrections gallery.



Figure 7-7: The Color gallery.

Working with Shapes and Pictures

make your picture or graphic appear as if it was painted or drawn with the click of a button.

1. Double-click the picture or graphic to which you want to apply an artistic effect.

The **FORMAT** tab appears on the Ribbon under **PICTURE TOOLS**.

2. Click the **FORMAT** tab, then select the **Artistic Effects** button in the Adjust group.

A gallery of artistic effects appears.

3. Select an artistic effect from the gallery.

The artistic effect is applied accordingly.

- ✔ **Tip:** To preview how the artistic effect will change your picture or graphic, briefly hold the mouse over the effect.

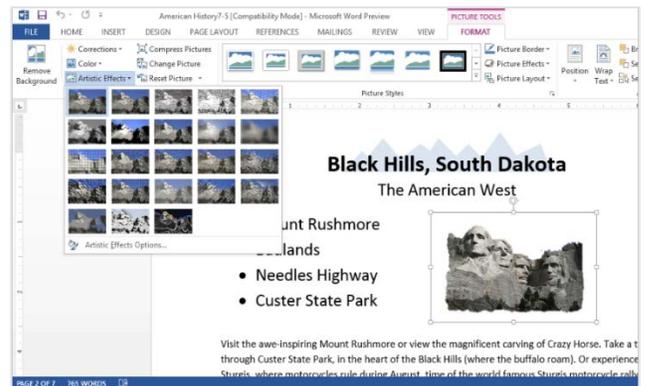


Figure 7-8: The Artistic Effects gallery.

Formatting Pictures or Graphics

Word comes with several features that allow you to alter a picture or graphics file once it has been inserted.

Crop a picture or graphic

When you crop a picture or graphic, you trim its horizontal and vertical sides. Cropping is useful when you only want to include a portion of a picture or graphic.

1. Double-click the picture or graphic that you want to crop.

The **FORMAT** contextual tab appears on the Ribbon under **PICTURE TOOLS**.

2. Click the **FORMAT** tab, then select the **Crop** button list arrow in the **Size** group.

A list of options appear. See **Table 7-2: Cropping Options**, for a description of each option.

3. Click **Crop**.
4. Click and drag the picture or graphic's cropping handles.

Word crops the picture or graphics.

- ✓ **Tip:** To crop all four sides of a picture or graphic at once while maintaining the graphic's proportions, press and hold down the **<Ctrl>** key as you drag the mouse.

5. Click the **Crop** button in the **Size** group once again to turn off the cropping tool.

The image is cropped.

Change the visual style of a picture or graphic

Changing the visual style of a picture or graphic changes how it appears on the page.

1. Double-click the picture or graphic that you want to adjust.

The **FORMAT** contextual tab appears on the Ribbon under **PICTURE TOOLS**.

2. Click the **FORMAT** tab, then select a Picture Style from the **Picture Styles** Gallery in the **Picture Styles** group.

- ✓ **Tip:** To view all the available styles, click the **More** button (▾) in the **Picture Styles** group. The style is applied to the picture or graphic.

Exercise

- **Exercise File:** American History7-6.docx
- **Exercise:** Crop the picture on page 4.
Apply the **Rotated, White** picture style to the image.

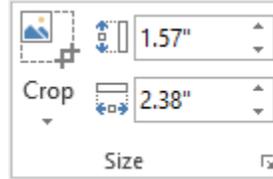


Figure 7-9: The **Size** group on the **FORMAT** tab.

Table 7-2: Cropping Options

Crop to Shape	Crops your graphic to fit inside a shape selected from the gallery.
Aspect Ratio	Crops your picture or graphic according to an aspect ratio.
Fill	Resizes the picture so that the entire picture area is filled while keeping the aspect ratio. Use when enlarging an image.
Fit	Resizes the picture so that the entire picture area is filled while keeping the aspect ratio. Use when shrinking an image.

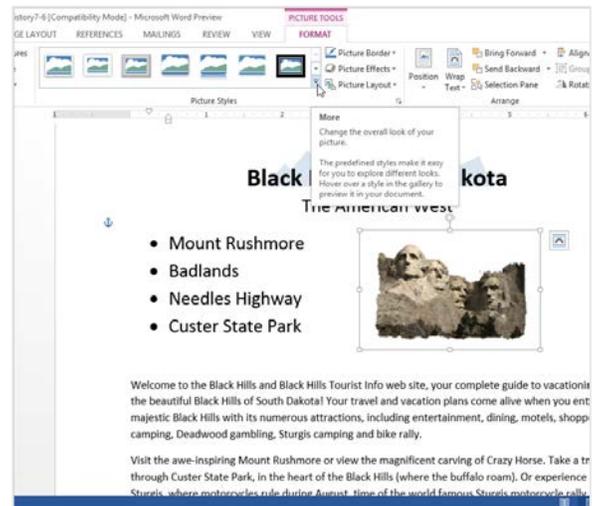


Figure 7-10: The **Picture Styles** gallery.

Inserting Shapes

Word 2013 comes with an extensive set of ready-made shapes, called AutoShapes that you can use to easily draw shapes on your documents. The Shapes gallery contains over a hundred common shapes and lines, such as stars, arrows, and speech balloons.

Draw a shape

To insert a shape into a document, draw it.

1. Click the **INSERT** tab on the Ribbon and click the **Shapes** button in the Illustrations group.

The AutoShapes gallery appears.

2. Click the shape you want to insert.

The arrow pointer changes to a crosshair.

3. Click and drag on the page or drawing canvas until the shape reaches the desired size.

✔ **Tip:** To draw a straight line, perfect square or circle, or to constrain the dimensions of other shapes, press and hold down the **<Shift>** key as you drag.

4. Release the mouse button.

The shape is inserted and the **FORMAT** contextual tab appears on the Ribbon under **DRAWING TOOLS**.

Adjust a shape

You can adjust the most prominent feature of a shape—such as the point on an arrow or the spikes on a star—by using its adjustment handle.

1. Click the shape you want to adjust.
2. Click and drag the shape's adjustment handle (■), and release the mouse button when you're finished.

The shape is adjusted.

✔ **Tip:** Some shapes have more than one adjustment handle, while others don't have any at all.

Add text to a shape

Adding text to a shape is extremely easy.

- Click the shape you want to add to and start typing.
 - **Other Ways to Add Text to a Shape:** Right-click the shape you want to add text to, select **Add text** from the contextual menu, and type your text.

Exercise

- **Exercise File:** American History7-7.docx
- **Exercise:** Insert a 16-point star over the Statue of Liberty image and adjust so that the points are longer.

Table 7-3: AutoShape Categories

Lines	Straight lines, curved lines, scribbled lines, arrows, and free form drawing shapes.
Basic Shapes	Squares, rectangles, triangles, circles, pentagons, and more.
Block Arrows	Arrows that point up, down, left, and right.
Flowchart	Basic shapes used to create flowcharts.
Callouts	Text box shapes that point to and describe something.
Stars and Banners	Shapes that boldly announce something.

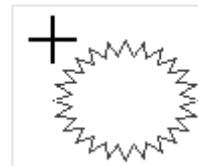


Figure 7-11: Click and drag to create an AutoShape.



Figure 7-12: Click and drag the adjustment handle to change the AutoShape.

Formatting Shapes

The first thing you'll probably want to do after inserting a shape is change its fill and outline color. This lesson will show you how to format a shape.

Change the fill color of a shape

You can add, adjust, or remove the fill color of the shapes you create in Word.

1. Double-click the shape whose fill color you wish to change.

The **FORMAT** tab appears on the Ribbon under **DRAWING TOOLS**.

2. Click the **FORMAT** tab, then select the **Shape Fill** button list arrow in the Shape Styles group.

The Shape Fill menu appears. You have several options to choose from. See **Table 7-4: Shape Fill Options**.

3. Select an option from the menu.

Other Ways to Change the Fill Color of a Shape:

Right-click the shape and select **Format Shape** from the contextual menu. Click the **Fill** tab, select your options, and click **Close** when you're finished.

Change the outline of a shape

You can add an outline to shapes or adjust or remove an existing outline.

1. Double-click the shape whose outline you wish to change.

The **FORMAT** tab appears on the Ribbon under **DRAWING TOOLS**.

2. Click the **FORMAT** tab, then select the **Shape Outline** button in the Shape Styles group.

The Shape Outline menu appears. You have several options to choose from. See **Table 7-5: Shape Outline Menu**.

3. Select an option from the menu.

Other Ways to Change the Outline of a Shape:

Right-click the shape and select **Format Shape** from the contextual menu. Click the **Line Color** tab to add a line, click the **Line Style** tab to select your options, and click **Close** when you're finished.

Exercise

- **Exercise File:** American History7-8.docx
- **Exercise:** Apply a yellow fill color to the star shape on page 3.
Then apply a thick, orange outline color to the shape.

Table 7-4: Shape Fill Options

Theme Colors	Select a fill color from the colors in the current theme.	
Standard Colors	Select a fill color from one of the 10 standard colors.	
No Fill	Removes the fill color.	
More Fill Colors	Select a fill color from one of the thousands of colors in the Colors dialog box.	
Picture	Fills the shape with a graphic you have on file.	
Gradient	Color gradually changes from one color to another.	
Texture	Fills the shape with a texture.	

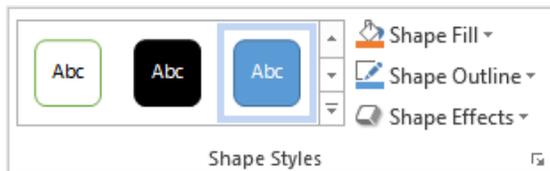


Figure 7-13: The Shape Styles group.

Table 7-5: Shape Outline Menu

Theme Colors	Select an outline color from the colors in the current theme.	
Standard Colors	Select an outline color from one of the 10 standard colors.	
No Outline	Removes the outline.	
More Outline Colors	Select an outline color from one of the thousands of colors in the Colors dialog box.	
Weight	Changes the thickness of an outline.	
Dashes	Changes the look of the outline.	
Arrows	Changes the look of an arrow shape.	

Change the visual style of a shape

Changing the visual style of a shape is an easy way to spice up its appearance. A visual style is a set of different formatting commands that can be applied to a shape in one single step.

1. Double-click the shape that you want to change.

The **FORMAT** tab appears on the Ribbon under **DRAWING TOOLS**.

2. Select the **FORMAT** tab, then select a style from the Shape Style Gallery in the Shape Styles group.

✔ **Tip:** To view all the available styles, click the **More** button (▾) in the Shape Styles group to display the Styles gallery.

The visual style is applied to the shape.

✔ **Tip:**

- ✓ The colors of the Shape Style options change with the document theme and/or theme color.

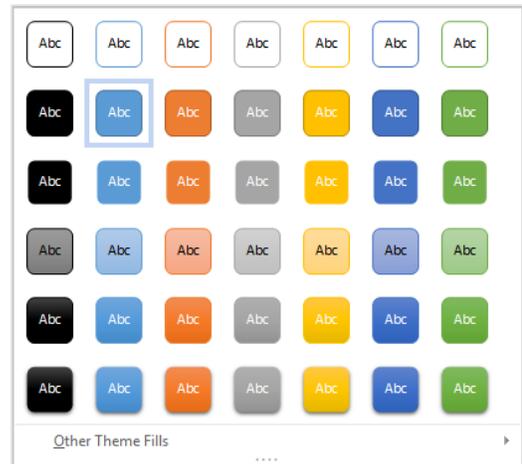


Figure 7-14: The colors available in the Shape Style gallery change with the Theme color.

Resizing, Moving, Copying, and Deleting Objects

More often than not, the objects that you insert into your documents will need to be modified in order to coincide with the other elements in a document. This lesson will show you how to resize, move, copy, and delete the shapes and graphics in your documents.

Resize an object

Make an object larger or smaller by resizing it.

1. Click the object to select it.
Sizing handles appear around the object once it is selected. You can use these sizing handles to change the size and proportions of the selected object.
2. Click and drag one of the object's sizing handles.
Tip: To maintain the object's proportions while resizing, hold down the **<Shift>** key as you drag.
3. Release the mouse button.

Move an object

By simply clicking and dragging with the mouse, you can move an object to a new location on the page.

1. Click and drag the object to a new location.
2. Release the mouse button when the object is positioned where you want it.

Copy an object

You can also copy an object by clicking and dragging.

1. Press and hold down the **<Ctrl>** key, and click and drag the object to a new location.
2. Release the mouse button, and then release the key.

Delete an object

If you decide you don't want an object, delete it.

- Select the object that you want to delete and press the **<Delete>** key.
The object is removed from the document.

Exercise

- **Exercise File:** American History7-9.docx
- **Exercise:** Enlarge the Mount Rushmore image on page 2.
Then, make a duplicate of the cowboy hat image on page 5 and delete the duplicate image.

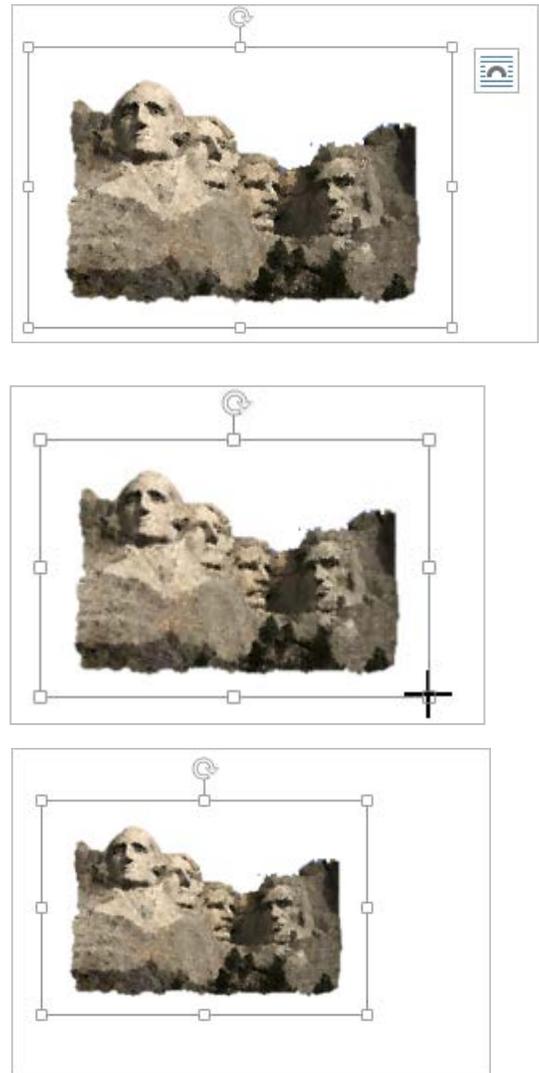


Figure 7-15: To resize an object, click one of its sizing handles and drag to the new size.

Positioning Objects

Whenever you insert a graphic into a document, it is inserted In line with text by default. This means that the text in the document moves in order to accommodate the graphic. This lesson will show you how to adjust text wrapping and how to use the grid to position objects.

Adjust text wrapping

To adjust how text reacts to the objects in your documents, change the object’s text wrapping.

1. Double-click the object whose text wrapping you wish to adjust.

The FORMAT tab appears on the Ribbon.

2. Click the **Wrap Text** button in the Arrange group.

A list of text wrapping styles appears. See **Table 7-6: Text Wrapping Styles** table for a description of each style.

3. Select a text wrapping style from the list.

The text wrapping style is applied to the image.

 **Other Ways to Adjust Text Wrapping:**

Right-click the image, point to **Wrap Text** in the contextual menu, and select an option from the submenu.

Display/hide the grid

Just like the graph paper you used to use in geometry class, the *grid* consists of horizontal and vertical lines that help you draw and position objects.

1. Click the **VIEW** tab on the Ribbon.
 2. Click the **Gridlines** check box in the Show group.
- Horizontal and vertical gridlines appear on the page.

 **Tip:**

- ✓ Gridlines do NOT appear in the printed document.

Adjust grid settings

To adjust grid settings, such as how much space appears between gridlines, open the Drawing Grid dialog box.

1. Click the **FORMAT** tab on the Ribbon.

-  **Tip:** If the FORMAT tab isn’t displayed on the Ribbon, double-click an object in the document to display it.

Exercise

- **Exercise File:** American History7-10.docx
- **Exercise:** Change the text wrapping style of the lighthouse image on page 6 to “Tight”.
Display the grid, then turn off the Snap to Grid feature.
Hide the grid.

Table 7-6: Text Wrapping Styles

	In Line with Text	This places the object at the insertion point in a line of text in the document. The object remains on the same layer as the text. This is the default setting.
	Square	Wraps text around all sides of the square bounding box for the selected object.
	Tight	Wraps text tightly around the edges of the actual image (instead of wrapping around the object’s bounding box).
	Through	Similar to the Tight option, this option wraps text throughout the image.
	Top and Bottom	Wraps text around the top and bottom of the object, leaving the area to the right and left of the object clear.
	Behind Text	This removes text wrapping and puts the object behind text in the document. The object floats on its own layer.
	In Front of Text	This removes text wrapping and places the object in front of text in the document. The object floats on its own layer.



Figure 7-16: The page with the grid displayed.

2. Click the **Align** button in the Arrange group and select **Grid Settings** from the list.

The Drawing Grid dialog box appears.

3. Make your adjustments and click **OK** when you're finished.

Turn on/off the Snap to Grid feature

The Snap to Grid feature causes objects to “snap” to the nearest gridline when you move them around in your documents. This can be convenient or extremely inconvenient depending on your personal preferences. The Snap to Grid feature is turned off by default in Word 2013, but you can easily turn it on.

1. Click the **FORMAT** tab on the Ribbon.

✔ **Tip:** If the **FORMAT** tab isn't displayed on the Ribbon, double-click an object in the document to display it.

2. Click the **Align** button in the Arrange group and select **Grid Settings** from the menu.

The Grid and Guides dialog box appears.

3. Click the **Snap objects to grid** check box.

✔ **Tip:** To set this as the default setting, click the **Set as Default** button in the Grid and Guides dialog box.

4. Click **OK**.

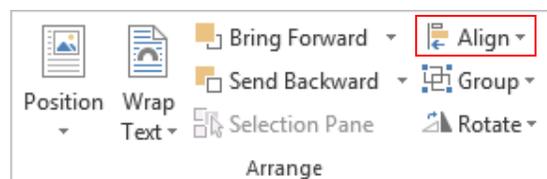


Figure 7-17: Click the Align button in the Arrange group to align objects and adjust grid settings.

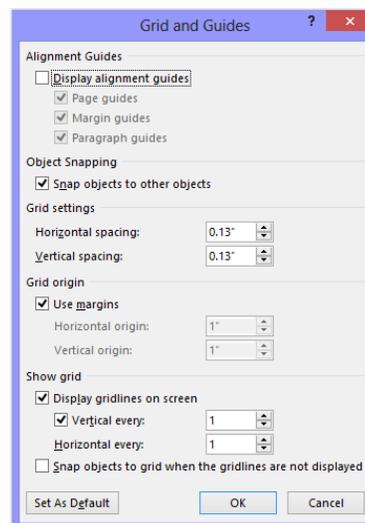


Figure 7-18: Adjust grid settings in the Grid and Guides dialog box.

Applying Special Effects

You can apply special effects such as reflection, glow, and 3-D rotation to clip art, shapes, and pictures.

1. Select the picture or shape that you want to apply special effects to.

The **FORMAT** tab appears on the Ribbon under **PICTURE TOOLS** or **DRAWING TOOLS**.

2. Depending on the object, click the **Picture Effects** button in the Picture Styles group or the Shape Effects in the Shape Styles group.

A list of different types of effects appears.

3. Point to the type of effect that you want to use, then select an option from the submenu.

The special effect is applied to the picture.

- ✔ **Tip:** To preview how a special effect will change your image or object, point to different effects in the gallery before clicking them to select.

Exercise

- **Exercise File:** American History7-11.docx
- **Exercise:** Apply a glow effect to the first rectangle shape on page 5.

Apply the special effect of your choice to the second and third rectangle shapes.

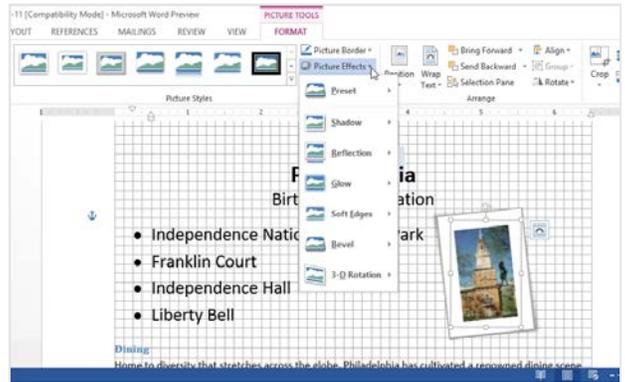


Figure 7-19: The Picture Effects gallery.

Table 7-7: Special effects

	
Preset	Shadow
	
Reflection	Glow
	
Soft Edges	Bevel
	
3-D Rotation	

Grouping Objects

It is often easier to work with a single object than it is to work with several smaller objects. A group is a collection of objects that Word treats as a single object.

Select multiple objects

Before you can work with multiple objects, you must select them.

- Press and hold down the <Shift> or <Ctrl> key as you click each object that you want to select.

Group objects

By grouping several objects together you can format an entire group of objects rather than formatting each object individually.

1. Select the objects that you want to group and click the **FORMAT** tab on the Ribbon.
2. Click the **Group** button in the Arrange group and select **Group** from the list.
 - **Other Ways to Group Objects:** Select the objects that you want to group. Then, right-click one of the selected objects, point to **Group** in the contextual menu, and select **Group**.

Ungroup objects

If you need to make changes to an object that is part of a group, you'll need to ungroup the objects first.

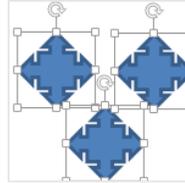
1. Select the group of objects that you want to ungroup and click the **FORMAT** tab on the Ribbon.
2. Click the **Group** button in the Arrange group, and select **Ungroup** from the menu.

The selected objects are ungrouped. Now you can work with each object individually.

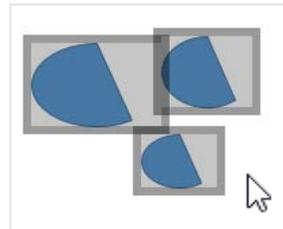
- **Other Ways to Ungroup Objects:** Right-click the group, point to **Group** in the contextual menu, and select **Ungroup** from the submenu.

Exercise

- **Exercise File:** American History7-12.docx
- **Exercise:** Group the rectangles and arrows on page 5. Then, ungroup the objects.



Select multiple objects by holding down the <Shift> key as you click each object...



...or by drawing a box around the objects you want to select.

Figure 7-20: Selecting multiple objects in a document.

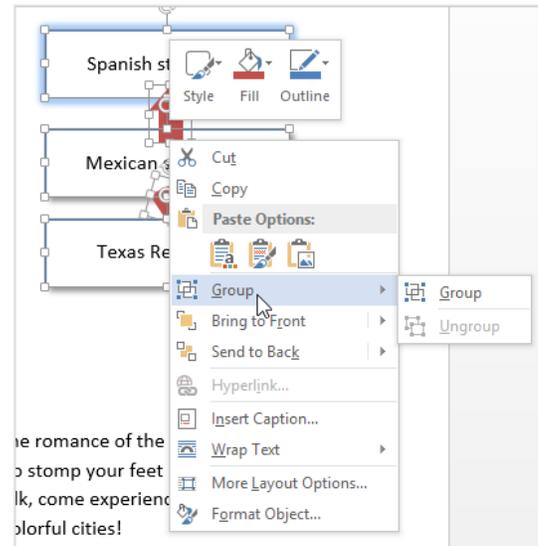


Figure 7-21: You can also use the contextual menu to group and ungroup objects.

Aligning and Distributing Objects

Align objects

Documents that have pictures and graphic scattered randomly about them look terrible. This lesson will show you how to use the Align and Distribute features to organize the objects in your document. The Align command aligns objects relative to one another.

1. Select the objects that you want to align.
2. Click the **FORMAT** tab on the Ribbon and click the **Align** button in the Arrange group.
A list of alignment options appears.
3. Select an alignment option from the menu.
The selected objects are aligned accordingly.

Distribute objects

The Distribute command spaces objects evenly.

1. Select the objects that you want to distribute.
2. Click the **FORMAT** contextual tab on the Ribbon and click the **Align** button in the Arrange group.
You can distribute objects vertically or horizontally.
3. Select a distribution option from the list.
The selected objects are distributed accordingly.

Exercise

- **Exercise File:** American History7-13.docx.
- **Exercise:** Align the Legislative, Executive, and Judicial images on page 7 with the bottom-most image. Then, distribute the objects horizontally.

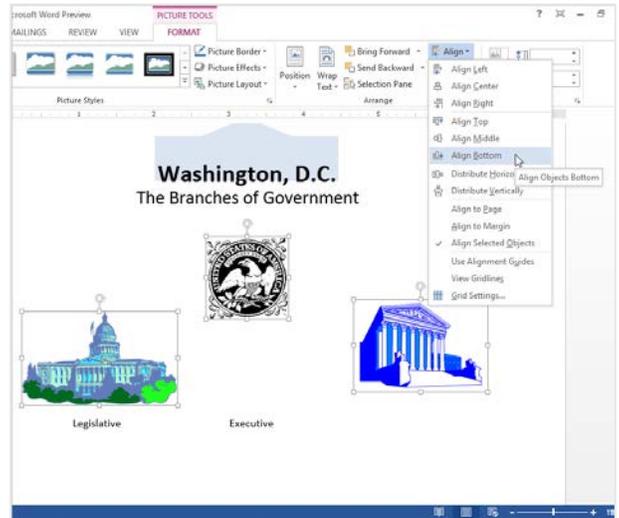


Figure 7-22: The selected objects are aligned so that the top edges are even.



Figure 7-23: The selected images are distributed horizontally.

Flipping and Rotating Objects

Flip an object

When you flip an object, you create a mirror image of it. Word allows you to flip an object horizontally or vertically.

1. Select the object that you want to flip.
2. Click the **FORMAT** tab on the Ribbon, then select the **Rotate** button in the Arrange group.
3. Select **Flip Vertical** or **Flip Horizontal** from the list.

The object is flipped accordingly.

Rotate an object

When you rotate an object, you turn it around its center. You can rotate objects in 90-degree increments or you can use the rotation handle to rotate an object manually.

1. Select the object that you want to rotate.
A rotation handle appears.
2. Click and drag the object's **rotation handle**.

Word rotates the selected object.

Other Ways to Rotate an Object:

Double-click the object that you want to rotate, click the **Rotate** button in the Arrange group and select **Rotate Right 90°** or **Rotate Left 90°** from the list.

Rotate an object with greater precision

Using an object's rotation handle is the fastest and easiest way to rotate an object, but you can rotate an object with greater precision using a dialog box.

1. Double-click the object that you want to rotate.
The **FORMAT** contextual tab appears on the Ribbon.
2. Click the **FORMAT** tab, then select the **Rotate** button in the Arrange group and select **More Rotation Options** from the list.
A dialog box appears, offering rotation options relative to the type of object that is selected.
3. In the **Rotate** box, enter the number of degrees that you want to rotate the object.
4. Click **OK** to close the dialog box.
The object is rotated accordingly.

Exercise

- **Exercise File:** American History7-14.docx
- **Exercise:** Flip the upward-pointing arrow shape on page 5, so that it faces downward. Then, rotate the second arrow shape so that it faces downward as well.

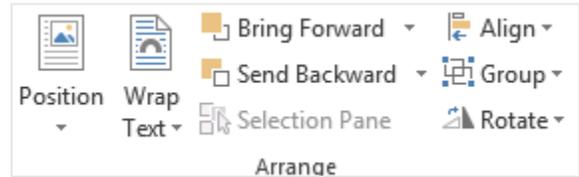


Figure 7-24: The Rotate button in the Arrange group.

Table 7-8: Flip and Rotate Commands

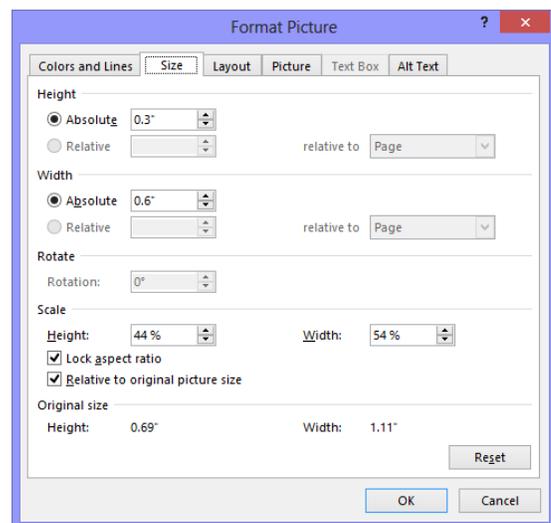
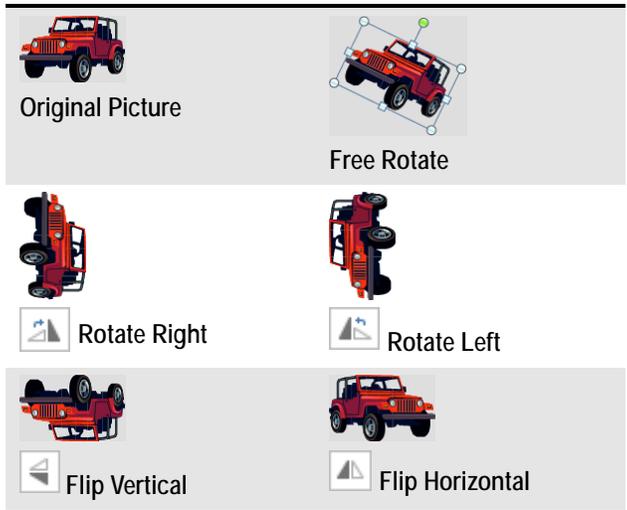


Figure 7-25: The Layout dialog box.

Layering Objects

How can you make sure one object on a page appears in front or in back of another object? Word solves this problem by layering objects, like a stack of papers. There are four layering commands in Microsoft Word:

- **Bring to Front:** You can choose to Bring to Front, Bring Forward, or Bring in Front of Text with this command.
- **Send to Back:** You can choose to Send to the Back, Send Backward, or Send in Behind Text with this command.
- **Bring Forward:** Brings the selected object up one layer.
- **Send Backward:** Sends the selected object down one layer.

Tip:

- ✓ By default, the first object that you insert in a document is assigned to the bottom layer of the page. Each object that you insert thereafter is assigned one level above, and so on. The final object that you insert will appear on the topmost layer.

1. Select the object that you want to layer.
The **FORMAT** contextual tab appears on the Ribbon.
2. Click the **FORMAT** tab, then select the **Bring Forward** or **Send Backward** button in the Arrange group, or click the **Bring Forward** or **Send Backward** button list arrow and select an option from the list.

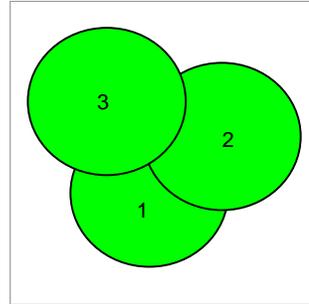
The object is layered accordingly.

Other Ways to Layer an Object:

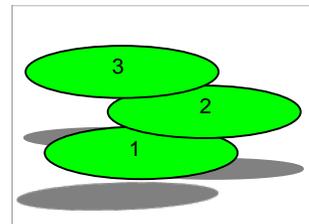
Right-click the object that you want to layer, point to **Bring to Front** or **Send to Back** in the contextual menu, and select an option from the submenu.

Exercise

- **Exercise File:** American History7-15.docx
- **Exercise:** Move the star shape behind the Statue of Liberty on page 3.



Layered objects, as they appear onscreen.



Layered objects are simply stacked on top of one another, like sheets of paper.

Figure 7-26: Layered objects.



Figure 7-27: Layering allows you to stack objects on top of each other.

Inserting a Text Box

A text box is a special type of drawing object that lets you insert and position text anywhere in a document.

Insert a built-in text box

1. Click the **INSERT** tab on the Ribbon and click the **Text Box** button in the Text group.

A list of built-in text box options appears.

2. Select a built-in text box to insert in the document.

Create a text box

You don't have to use one of Word's built-in text boxes; you can create your own.

1. Click the **INSERT** tab on the Ribbon and click the **Text Box** button in the Text group.

2. Select **Draw Text Box** from the list.

The arrow pointer changes to a crosshair, indicating you can draw the text box.

3. Click and drag on the page, until the text box reaches the desired size.

4. Click in the text box and type your text.

Link text boxes

Linking text boxes allows text to flow between them. For example, you could make the text of an article flow through several text boxes.

1. Enter text into a text box and select the text box.

In order to link the text box to a new one, there has to be more text in the text box than can be shown.

2. Under **DRAWING TOOLS**, click the **FORMAT** tab and click the **Create Link** button in the Text group.

The cursor changes into a pitcher full of letters . The pitcher will change to indicate it is ready to "pour" text into a text box.

3. Place the pitcher over an empty text box and click.

Tip:

- ✓ Formatting a text box is similar to formatting a shape. You can also format the text in a text box just as you would any other text.

Exercise

- **Exercise File:** American History7-16.docx
- **Exercise:** Use a text box underneath the Judicial image (the courthouse image on the right) on page 7 to insert a "Judicial" label under the image.
Center the text, and remove the text box border.

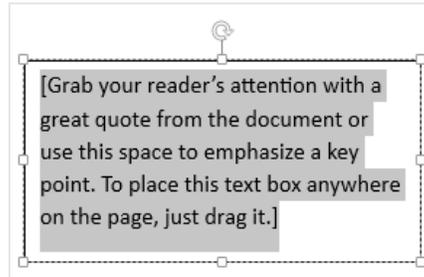


Figure 7-28: This is an example of a built-in text box.

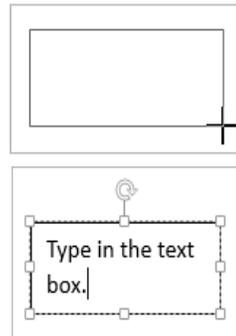
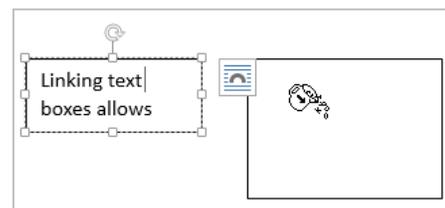
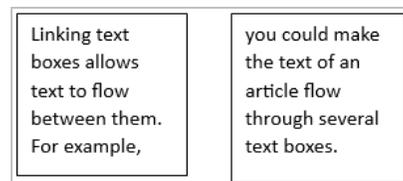


Figure 7-29: Click and drag to create the text box. Then enter text in the text box and format as necessary.



1. Click the **Create Link** button when the text box with overflow text is selected. Place the pitcher full of letters over the empty text box.



2. The text boxes are linked and the text flows between them.

Figure 7-30: Linking text boxes.

Working with Shapes and Pictures

Review

Quiz Questions

18. Which tab on the Ribbon is the Clip Art button located?
 - A. Illustrations
 - B. Insert
 - C. Design
 - D. Home

19. To insert a screenshot of a program window, you must ensure that the window is NOT minimized to the Windows taskbar. (True or False?)

20. Whenever a picture or graphics file has been inserted, the _____ contextual tab appears on the Ribbon by default.
 - A. Graphics
 - B. Picture
 - C. Format
 - D. Insert

21. When using the Remove Background tool, how can you refine the area that will be removed?
 - A. By simply clicking the areas you wish to keep.
 - B. By using the Mark Areas to Keep and Mark Areas to remove commands.
 - C. By using the Paintbrush tool and using a color that matches your slide's background.
 - D. By doing nothing; you cannot refine the area to be removed.

22. Which picture tool would you use in order to adjust the brightness and contrast of a picture?
 - A. Artistic Effects
 - B. Color
 - C. Change Picture
 - D. Corrections

23. The cropping tool is NOT useful in which of the following situations:
 - A. When you want to change the color of a picture or graphic.
 - B. When you only want to include a portion of a graphic—for example, a person's face instead of their entire body.
 - C. When you want to trim the edges of a picture.
 - D. When you want to remove a portion of a picture or graphic.

24. What is an adjustment handle used for?
 - A. To adjust the size of the shape.
 - B. To move the shape to a new location.
 - C. To adjust the color of the shape.
 - D. To adjust a shape's most prominent feature, such as the point on an arrow or the spikes on a star.

25. In Word, what does the term 'weight' mean?
- A. The color of a line.
 - B. The thickness of a line
 - C. How heavy your computer is.
 - D. The style of a line.
26. A visual style is a set of different formatting commands that can be applied to a shape in one single step. (True or False?)
27. What happens if you hold down the <Shift> key as you click and drag an object's sizing handles?
- A. Word copies the object.
 - B. Word moves the object.
 - C. Word maintains the object's proportions as it resizes the object.
 - D. Word changes the color of the object.
28. Gridlines do NOT appear in the printed document. (True or False?)
29. Text wrapping refers to the way objects interact with the text on a page. (True or False?)
30. Which of the following is NOT a type of special effect in Word 2013?
- A. Reflection
 - B. Glow
 - C. Morph
 - D. Bevel
31. Which of the following is the correct way to select more than one object in a document?
- A. Click the Format contextual tab on the Ribbon and click the Select Object button in the Arrange group.
 - B. Hold down the <Ctrl> key as you click each object.
 - C. Hold down the <Shift> key as you click each object.
 - D. You can only select one object at a time in Word 2013.
32. You cannot make changes to an individual object when it is grouped. (True or False?)
33. To rotate an object with more precision, use:
- A. a dialog box.
 - B. the Ribbon.
 - C. the rotation handle.
 - D. the contextual menu.
34. Which of the following is NOT a layering command in Word?
- A. Send to Back
 - B. Send to Middle
 - C. Bring to Front
 - D. Bring Forward
35. Text boxes are the only objects that permit you to add text. (True or False?)
36. Word includes built-in text boxes that you can insert into your documents. (True or False?)

Quiz Answers

- 1.
2. B. The Clip Art button is located in the Illustrations group on the Insert tab.
3. True. To insert a screenshot of another program window, it must NOT be minimized to the Windows taskbar.
4. C. Whenever a picture or graphics file has been inserted into a document, the Format contextual tab appears on the Ribbon under Picture Tools.
5. B. By using the Mark Areas to Keep and Mark Areas to Remove commands you can refine the area to be removed from the picture or graphic.
6. D. The Corrections command not only allows you to adjust the brightness and contrast of an image, but you can also sharpen and soften an image.
7. A. The cropping tool is not useful when it comes to changing the color of a picture or graphic.
8. D. An adjustment handle is used to adjust a shape's most prominent feature, such as the point on an arrow or the spikes on a star.
9. B. In Word, the term 'weight' refers to the thickness of a shape's outline.
10. True. A visual style is a set of different formatting commands that can be applied to a shape in one single step.
11. C. Holding down the <Shift> key as you click and drag an object's sizing handles maintains the object's proportions.
12. True. Gridlines do not appear in the printed document.
13. True. Text wrapping refers to the way objects interact with the text on a page.
14. C. Morph is not a type of special effect in Word 2013.
15. C. The correct way to select more than one object on a slide is to hold down the <Shift> key as you click each object.
16. True. In order to make changes to an object that is part of a group, you need to ungroup the object first.
17. A. To rotate an object with greater precision, use a dialog box.
18. B. Send to Middle is not a layering command in Word.
19. False. You can add text to any drawing object—simply right-click the object and select Add Text from the contextual menu.
20. True. Rather than formatting the text box and text on your own, choose a built-in option.

Working with WordArt, SmartArt, and Charts

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Word processors have come a long, long way since their introduction more than twenty years ago. Older word processors were just a little better than typewriters and could only create simple letters, reports, and memos. Today, people routinely use the advanced text and graphic capabilities of modern word processors to create beautiful newsletters, brochures, and catalogs—tasks that would have seemed impossible fifteen years ago. This chapter explains how you can incorporate three types of objects into your documents to give them pizzazz and present information in an organized manner.

Using Exercise Files

This chapter suggests exercises to practice the topic of each lesson. There are two ways you may follow along with the exercise files:

- Open the exercise file for a lesson, perform the lesson exercise, and close the exercise file.
- Open the exercise file for a lesson, perform the lesson exercise, and keep the file open to perform the remaining lesson exercises for the chapter.

The exercises are written so that you may “build upon them”, meaning the exercises in a chapter can be performed in succession from the first lesson to the last.

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Inserting WordArt

WordArt is a fast and easy way to add dramatic and colorful effects to text in your documents.

Insert WordArt

Inserting Word Art is like inserting any other text box into your document, but with some additional formatting.

1. Place the insertion point where you wish to insert the WordArt.
2. Click the **INSERT** tab on the Ribbon and click the **WordArt** button in the Text group.
The WordArt gallery appears.
3. Select a WordArt style from the gallery.
A text box appears.
4. Type the text you want to appear in the WordArt.
The WordArt is inserted in the document.

! Trap: If you view a document with 2013 WordArt in a previous version of Office, the WordArt text will appear but all text effects will be removed.

Position WordArt

You can reposition the WordArt you insert, wherever you want.

1. Click and drag the inserted WordArt object to a new location.
2. Release the mouse button when the object is positioned where you want it.

✓ Tip:

- ✓ Working with WordArt in Word 2013 is a lot like working with pictures and shapes. You can change text wrapping, move WordArt, even flip and rotate it like a picture or shape.

Exercise

- **Exercise File:** Destination8-1.docx
- **Exercise:** Insert “WordArt” with the text “Destinations” under the text “North Shore Travel’s” on page 1. Use the “Gradient Fill – Purple, Accent 4, Outline – Accent 4” style.



Figure 8-1: There are several styles of WordArt available.



Figure 8-2: Click and drag the WordArt object to move it.

Editing WordArt

Once you've added WordArt to your document, it's easy to edit or change the object's style

Edit text

You can edit a WordArt object the same way you edit any other text box.

1. Place the insertion point where you wish to add or delete text in the WordArt object.

2. Enter or delete text as necessary.

The WordArt text is changed

Change WordArt style

If you decide that you don't like the style of WordArt, you can easily change the style without adding text to a new object.

1. Select the WordArt object that you want to modify.

2. Click the **FORMAT** tab, then select the **More** button in the WordArt Styles.

3. Select the style you want to apply.

The style of the WordArt is changed.

✓ Tips:

- ✓ As you point to different selections, Word shows you a preview of how the text would look if the selected Style were applied.
- ✓ Select **Clear WordArt** from the WordArt Styles gallery to remove any WordArt formatting.

📖 Exercise

- **Exercise File:** Destinations8-2.docx
- **Exercise:** Add an exclamation point to "Destinations!" Center the WordArt on the page and apply the "Gradient Fill – Aqua, Accent 1, Reflection" style to the WordArt object.



Figure 8-3: Choose a new WordArt Style by clicking the more button.

Formatting WordArt

Sometimes you may not like all the preconfigured WordArt styles. You can format WordArt so it fits your needs. For example, you can change the text fill and outline color, or apply a cool text effect.

Change text size or font type

1. Select the WordArt object you wish to format.
2. Click the **HOME** tab on the Ribbon and format the text with the options listed in the Font group.
 - **Other Ways to Change WordArt Font:** Select the text in the WordArt object and select a formatting option from the Mini Toolbar. Or, click the **Dialog Box Launcher** in the Font group, or press <Ctrl> + <Shift> + <F> to open the Font dialog box. Select an option from the Font dialog box and click **OK**.

Change fill color

You can further change your WordArt by selecting a different text color.

1. Select the WordArt object you wish to format.
2. Under **DRAWING TOOLS** on the Ribbon, click the **FORMAT** tab and click the **Text Fill** button list arrow in the WordArt Styles group.

A list of color options appear.

- **Other Ways to Change WordArt Fill Color:** Click the **HOME** tab on the Ribbon and click the **Font Color** button in the Font group.

3. Select the text fill you wish to use.

As you point to a text fill, Word displays a preview of how the outline would work.

Change outline color

Outlining your text helps it stand out, especially if you've chosen a muted color for the text.

1. Select the WordArt object you wish to format.
2. Under **DRAWING TOOLS** on the Ribbon, click the **FORMAT** tab and click the **Text Outline** button list arrow in the WordArt Styles group.

A list of color options appear.

- **Other Ways to Change the Outline Color:** Click the **FORMAT** tab on the Ribbon under

Exercise

- **Exercise File:** Destination8-3.docx
- **Exercise:** Change the WordArt font to Century Gothic. Change the text color to light green and the outline color to blue. Apply the Can Up transform text effect.

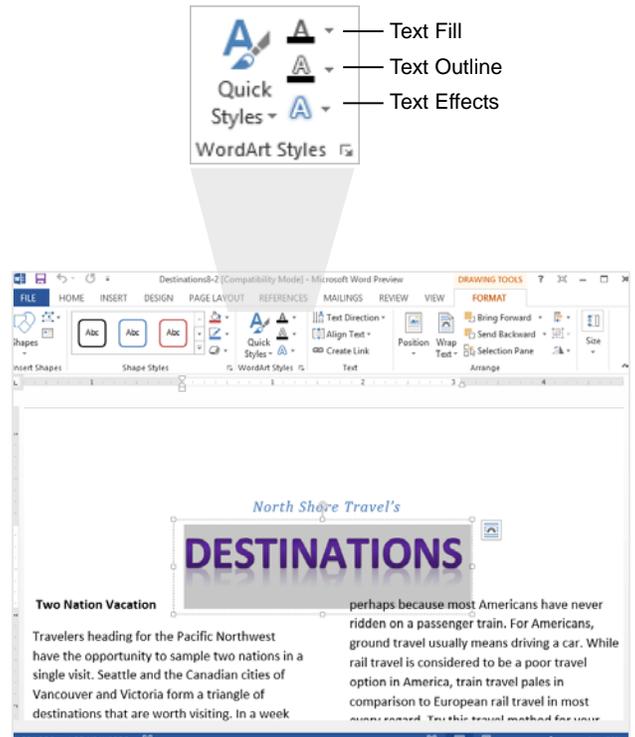


Figure 8-4: Format WordArt using the WordArt Styles group on the **FORMAT** tab of the Ribbon.



Figure 8-5: The Format Text Effects dialog box.

DRAWING TOOLS and click the **Dialog Box Launcher**. Click **Text Outline**.

3. Select the text outline you wish to use.

As you point to a text outline, Word displays a preview of how the outline would look.

Apply text effects

Text effects add a little bit of emphasis to WordArt, making it stand out even more than bright colors or size.

1. Select the WordArt object you wish to format.
2. Under DRAWING TOOLS on the Ribbon, click the **FORMAT** tab and click the **Text Effects** button in the WordArt Styles group.

A list of text effects appears.

✔ **Tip:** In addition to the standard text effects, you can add the Transform text effect to WordArt. Transform reshapes your WordArt.

3. Select the text effect you wish to use.

As you point to a text effect, Word displays a preview of how the effect would look.

✔ **Tip:**

- ✓ While you can make individual changes to WordArt, you cannot save these changes as a WordArt Style.

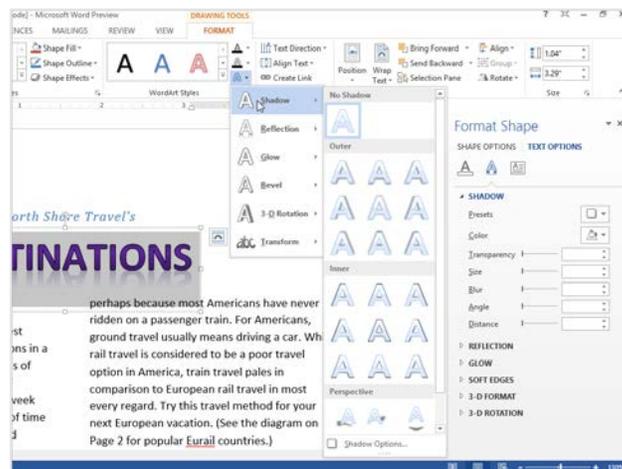


Figure 8-6: Reshape your text using the Transform text effects.

Inserting SmartArt

The SmartArt feature lets you create and customize designer-quality diagrams. You can even convert bulleted lists into a diagram using the SMARTART TOOLS tab.

Insert a SmartArt graphic

1. Click the **INSERT** tab on the Ribbon and click the **SmartArt** button in the Illustrations group.
The Choose a SmartArt Graphic dialog box appears. Here you need to select the type of graphic you want to insert.
2. Select a chart or diagram type, then select a chart or diagram.
See **Table 8-1: SmartArt Graphics** for description of each type of SmartArt graphic available.
3. Click **OK**.
The SmartArt object is inserted in the document.

Add text to a SmartArt graphic

There are two ways to add text to a SmartArt graphic: using the Text pane or the graphic itself.

1. Click the **[Text]** placeholder in the shape where you want to insert your text.
A blinking cursor appears, indicating that you can type your text.
2. Enter the text you want to use in the graphic.
 - **Other Ways to Add Text to SmartArt:**
Click a bullet in the Text pane and type your text. If the Text pane is not visible, click the **tab** in the middle of the left border of the SmartArt graphic. Or, select the SmartArt graphic and click the **DESIGN** tab on the Ribbon under SMARTART TOOLS. Click the **Text Pane** button in the Create Graphic group.

✓ Tips:

- ✓ In the Text pane, use the **<up>** or **<down>** arrow keys on your keyboard to move between placeholders.
- ✓ To add an additional placeholder, press **<Enter>** in the Text pane.

📖 Exercise

- **Exercise File:** Destinations8-4.docx, Destinations12-3.docx.
- **Exercise:** Insert a Basic Block List, SmartArt graphic on page 2 with all the countries listed to replace the the current table.

Table 8-1: SmartArt Graphics

List	Show non-sequential information.
Process	Show steps in a process or timeline.
Cycle	Show a continual process.
Hierarchy	Create an organization chart or decision tree.
Relationship	Illustrate connections.
Matrix	Show how parts relate to a whole.
Pyramid	Show proportional relationships with the largest component on the top or bottom.
Picture	Create a SmartArt graphic that incorporates pictures

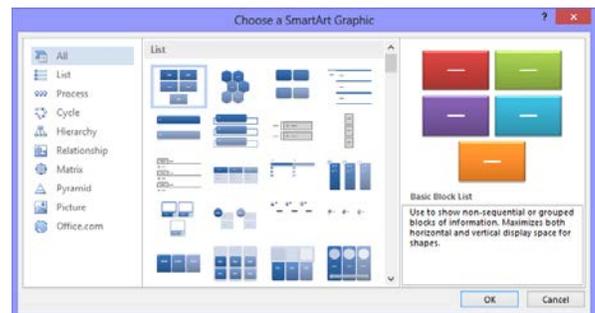
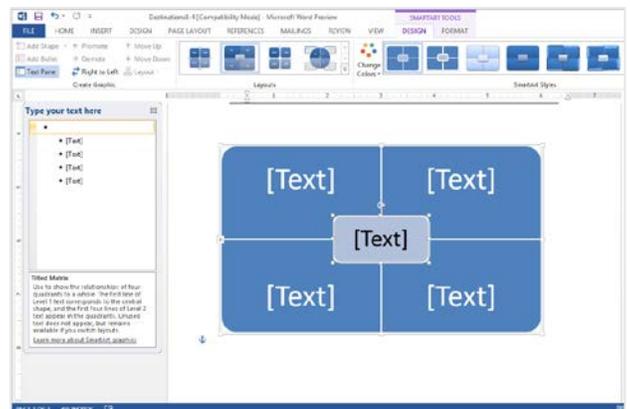


Figure 8-7: The Choose a SmartArt Graphic dialog box.



Working with WordArt, SmartArt, and Charts

Edit text in a SmartArt graphic

Once you've had a chance to edit your document, you may need to rearrange text in the SmartArt graphic. Word makes it easy for you to rearrange text without worrying about retyping, cutting, copying, or pasting.

1. Select the text you wish to move.

The SMARTART TOOLS tab appears on the Ribbon.

2. Click the **DESIGN** tab under SMARTART TOOLS on the Ribbon.

The Create Graphic group lists several options for rearranging your text. Read more about each option in the table to the left.

3. Select the option you wish to use in the Create Graphic group.

Your text is moved.

Add a picture to a SmartArt graphic

If you select a Picture SmartArt layout, follow these steps to include a picture in your SmartArt graphic.

1. Insert a SmartArt picture graphic into your document.

The SmartArt graphic appears.

2. Click the **Picture** icon.

The Insert Picture dialog box appears.

3. Find and select the picture you want to insert and click **Insert**.

The picture is inserted into your SmartArt graphic.

Table 8-2: Text Options

Figure 8-8: The SmartArt and its text in the document.

Demote	Moves a bullet point down one level.
Right to Left	Changes the text order to read right to left.
Reorder Up	Moves a bullet point up in a list.
Reorder Down	Moves a bullet point down in a list.
Layout	This option is only available for organizational charts. Changes the layout of your organizational chart.

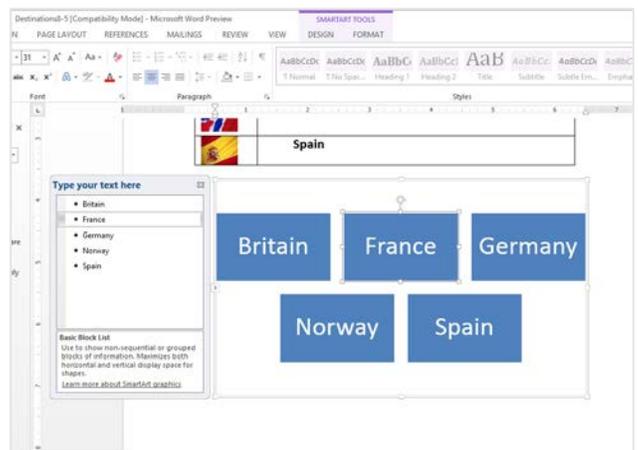


Figure 8-9: Rearrange text in a SmartArt graphic using the Create Graphic group.

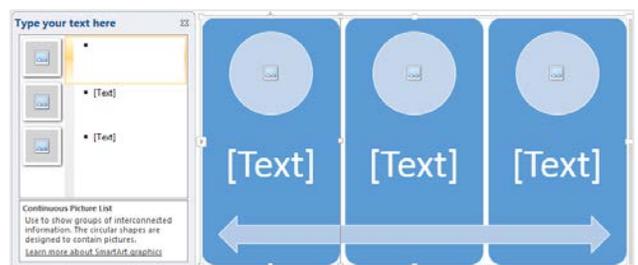


Figure 8-10: Click the picture icon to insert a picture into a SmartArt Graphic.

Working with SmartArt Elements

In order to create an effective SmartArt graphic, you need to know how to work with its elements. This includes adding new shapes, replacing shapes with different ones, or removing those you don't need. This lesson will show you how to do all of this and more.

Add a shape

Adding shapes to a SmartArt graphic is extremely easy.

1. Select the SmartArt graphic that you want to add a shape to.
2. Under SMARTART TOOLS on the Ribbon, click the **DESIGN** tab and click the **Add Shape** button list arrow in the Create Graphic group.

A list of location options appears.

3. Select a location from the list.
The new shape is inserted in the location specified.

Other Ways to Add a Shape:

In the Text pane, place your cursor at the beginning or end of a line of text and press **<Enter>**.

Change a shape

You can also change a shape without replacing the text in the shape.

1. Select the SmartArt shape that you want to change.
2. Under SMARTART TOOLS on the Ribbon, click the **FORMAT** tab and click the **Change Shape** button in the Shapes group.

The Shapes Gallery appears.

3. Select a shape from the gallery.
The existing shape is replaced, and the text in the shape is not removed or changed.

Remove a shape

It's easy to remove a shape if you don't want it in the SmartArt graphic any longer.

1. Select the shape you want to remove.
2. Press the **<Delete>** key.
The shape is removed from the SmartArt graphic.

Exercise

- **Exercise File:** Destinations8-5.docx
- **Exercise:** Add a shape for Sweden after the Spain shape in the SmartArt graphic on page 2.
Change the Sweden shape to an oval.
Remove the Sweden shape.

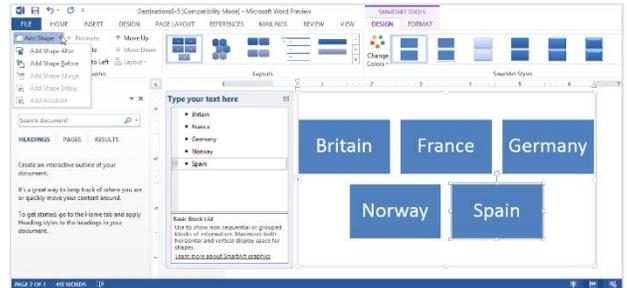


Figure 8-11: Adding a shape to a SmartArt graphic

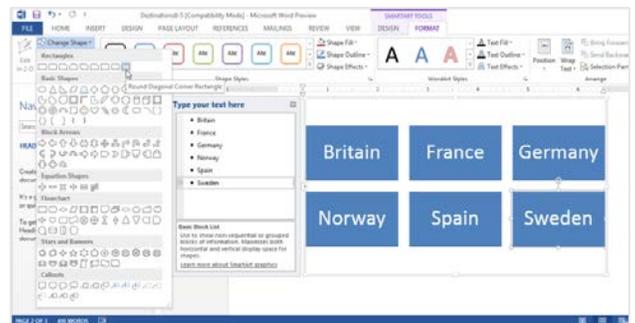


Figure 8-12: The Change Shape options on the FORMAT tab.

- 🔍 **Other Ways to Remove a Shape:**
Remove the bullet in the Text pane of the SmartArt graphic.

✔ **Tips:**

- ✔ To resize a shape, click and drag one of its sizing handles.
- ✔ To move a shape, simply click and drag the shape to a new location on the page. However, the automatic spacing is not applied when you move shapes.

Formatting SmartArt

Word 2013 has a variety of SmartArt layouts and styles that allow you to format your SmartArt graphics with the click of a button.

Change layout

If you find that the layout you selected isn't the best fit for your data, you can easily switch to a different layout.

1. Select the SmartArt graphic.
2. Under SMARTART TOOLS, click the **DESIGN** tab on the Ribbon.
3. Select a layout from the Layouts group.

The selected layout is applied.

✔ **Tip:** To view more layouts, click the **More** button (☰) in the Layouts group; click **More Layouts** to display the SmartArt Graphic dialog box.

🔗 **Other Ways to Change Layouts:**
Right-click the SmartArt graphic and select **Change Layout** from the contextual menu. Select a new layout and click **OK**.

Change color

If you don't like the color that has been assigned to your SmartArt graphic by default, change it.

1. Select the SmartArt graphic.
2. Under SMARTART TOOLS, click the **DESIGN** tab on the Ribbon.
3. Click the **Change Colors** button in the SmartArt Styles group.

The Color Gallery appears.

4. Select the color variation that you want to use.
Word updates the SmartArt graphic to reflect your changes.

Change style

Changing the visual style of a SmartArt graphic is an easy way to spice up its appearance. A visual style is a set of different formatting commands that can be applied to the graphic in one single step.

Exercise

- **Exercise File:** Destinations8-6.docx
- **Exercise:** Navigate to page 2. Change the layout of the SmartArt to “Vertical Picture Accent List”. Change the color to “Dark 2 Fill”. Change the style to “White Outline”. Cut the flags from the table and paste them into the picture placeholders of the SmartArt graphic. Delete the table.



Figure 8-13: Change the layout of the SmartArt graphic.



Figure 8-14: Several different color styles are available.

1. Select the SmartArt graphic.
2. Under SMARTART TOOLS, click the **DESIGN** tab on the Ribbon.
3. Select a style from the SmartArt Styles group.
The selected style is applied.
Tip: To view all the available styles, click the **More** button (▾) in the Chart Styles group to display the Chart Styles gallery.

Discard formatting changes

Sometimes you might find yourself wanting to start all over with a SmartArt graphic. When this happens, you can easily restore the default formatting of the graphic using the Reset Graphic command.

1. Select the SmartArt graphic and click the **DESIGN** tab on the Ribbon under SMARTART TOOLS.
2. Click the **Reset Graphic** button in the Reset group.
The graphic is restored to its original state.
Tip: To restore defaults for only one shape, right-click the shape and select **Reset Shape** from the contextual menu.



Figure 8-15: Click the More button to view all of the Chart Styles.

Inserting a Chart

Like the idiom “a picture is worth a thousand words,” a chart is often much better at presenting information than numbers in a table.

Insert a chart

1. Navigate to the page where you want to insert the chart.
2. Click the **INSERT** tab on the Ribbon and click the **Chart** button in the Illustrations group.

The Insert Chart dialog box appears.

3. Select a chart type from the list.

A number of options are available under each chart type. See **Table 8-4: Chart Types**, for a description of each chart category.

4. Select a chart.

5. Click **OK**.

The chart is inserted onto the page, and an Excel 2013 worksheet opens in another window. This is where you enter the data for the chart.

- ✓ **Tip:** If you don’t have Office Excel 2013 installed, a Microsoft Graph datasheet appears instead of an Excel worksheet. This is similar to Excel, but you don’t have as many options for working with data.

Insert chart data

After you insert a chart, you need to replace the sample data in the worksheet with your own data.

1. On the contextual Excel worksheet, click the cell you want to add data to.

Take a look at **Table 8-3: Excel Navigation Shortcuts**, for a few navigation shortcuts.

2. Enter data in the Excel worksheet.

The sample data is replaced with your own, and the chart updates to reflect your changes.

3. When you’re finished entering data, click the **Close** button in the Excel window.

Excel closes and you return to the Word document.

Exercise

- **Exercise File:** Destinations8-7.docx
- **Exercise:** Insert a Clustered Column chart on page 3. Enter the following data into the chart:

	Business	Pleasure	Other
Western	10	12	5
Central	12	15	8
Eastern	7	8	2
Kazakhstan	0	0	1

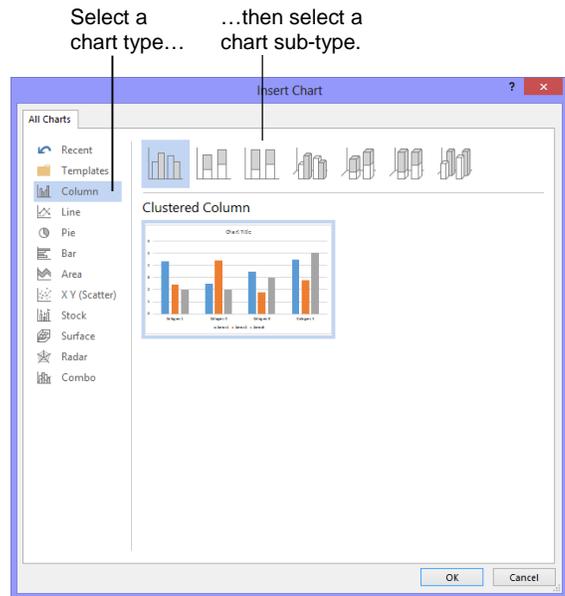


Figure 8-16: The Insert Chart dialog box.

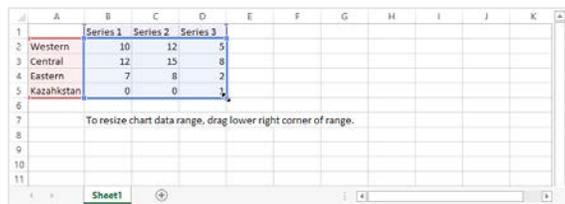


Figure 8-17: Enter chart data in the contextual Excel worksheet.

✓ Tips:

- ✓ To include more rows and columns of data in the Excel worksheet, click and drag the lower corner of the cell range around the cells you want to include.
- ✓ To edit a chart's data, select the chart, click the **DESIGN** tab on the Ribbon under CHART TOOLS, and click the **Edit Data** button in the Data group to open the Excel worksheet.

Table 8-3: Excel Navigation Shortcuts

<Tab>	Moves to the right one cell.
<Shift> + <Tab>	Moves to the left one cell.
<Enter>	Moves down to the next cell.
<←> <↑> <→> <↓>	Moves in the direction of the arrow key pressed.

Table 8-4: Chart Types

 Column	Column charts are used when you want to compare different values vertically, side-by-side.	 Line	Line charts are used to illustrate trends. Each value is plotted as a point on the chart and is connected to other values by a line.
 Pie	Pie charts are useful for showing values as a percentage of a whole. The values for each item are represented by different colors.	 Bar	Bar charts are just like column charts, except they display information in horizontal bars rather than in vertical columns.
 Area	Area charts are the same as line charts, except the area beneath the line is filled with color.	 XY (Scatter)	Scatter charts are used to plot clusters of values using single points. Multiple items can be plotted by using different colored points or different point symbols.
 Stock	Stock charts are effective for reporting the fluctuation of stock prices, such as the high, low, and closing points for a certain day.	 Surface	A surface chart is useful for finding optimum combinations between two sets of data. Colors and patterns indicate values that are in the same range.
 Combo	A combo, or combination, chart shows the relationship of two or more data series in a single chart.	 Radar	Radar charts compare the aggregate values of a number of data series.

Formatting a Chart

Word 2013 has a variety of built-in chart layouts and styles that allow you to format your charts with the click of a button.

Change chart layout

Built-in chart layouts allow you to quickly adjust the overall layout of your chart with different combinations of titles, objects, and chart orientations.

1. Select the chart.
2. Under CHART TOOLS on the Ribbon, click the **DESIGN** tab.
3. Click the **Quick Layout** button in the Chart Layouts group and select a layout from the gallery.

The selected layout is applied to the chart.

Change chart style

Changing the visual style of a chart is an easy way to spice up its appearance. A visual style is a set of different formatting commands that can be applied to a chart in a single step.

1. Select the chart.
2. Under CHART TOOLS on the Ribbon, click the **DESIGN** tab.

Click the Quick Layout button to view different layouts for the chart.

Click the More button to view available chart styles.

Region	Business	Pleasure	Other
Western	10	12	5
Central	12	15	8
Eastern	7	8	2
Kazakhstan	0	0	1

Figure 8-18: Change the layout and style of the chart under the DESIGN tab.

Exercise

- **Exercise File:** Destinations8-8.docx
- **Exercise:** Apply “Layout 2” to the chart. Then apply “Style 6” to the chart. Resize the chart so that it is smaller.



3. Click the **More** button in the Chart Styles group and select a style from the gallery.

The selected style is applied to the chart.

- ✔ **Tip:** To view all the available styles, click the **More** button (☰) in the Chart Styles group to display the Chart Styles gallery.

Resize a chart

Make the chart larger or smaller by resizing it.

1. Select the chart.

Eight sizing handles appear along the frame of the chart, as shown in the image below.

2. Click and drag one of the chart's sizing handles.

A faint outline appears as you drag, allowing you to preview the size of the chart.

- ✔ **Tip:** To maintain the chart's proportions while resizing, hold down the <Shift> key as you drag.

3. Release the mouse button.

The chart is resized.

Other Ways to Resize a Chart:

Under CHART TOOLS on the Ribbon, click the **FORMAT** tab and use the Height and Width fields in the Size group.

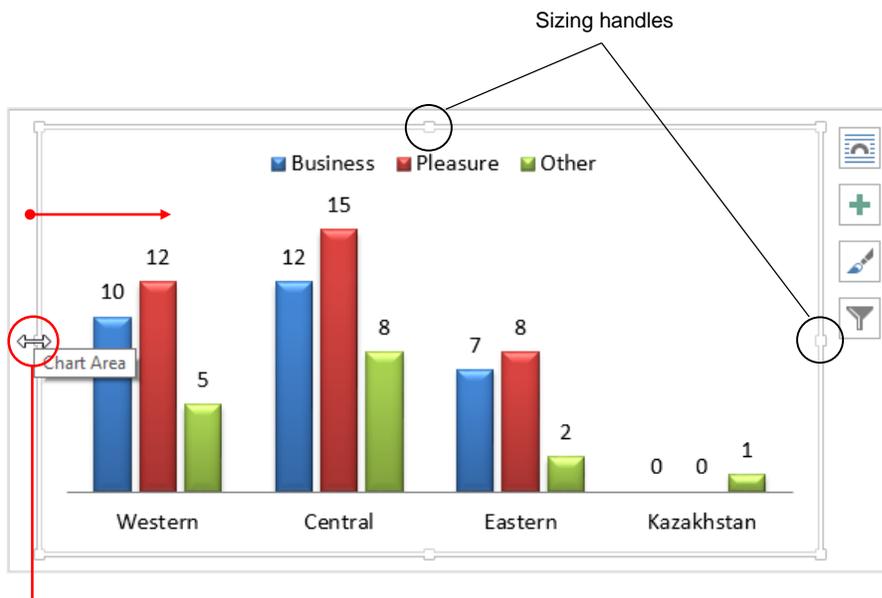


Figure 8-19: To resize a chart, simply click and drag one of its sizing handles.

Working with Labels

A label is an area of text that identifies a specific part of a chart. Titles, legends and tables are all examples of labels.

Insert or modify a label

Insert a new label, or adjust chart label appearance.

1. Under CHART TOOLS on the Ribbon, click the **DESIGN** tab.
2. Click the **Add Chart Element** button in the Chart Layouts group.

There are several labels to choose from in the Labels group:

- **Chart Title:** Add, remove or position chart title.
- **Axis Titles:** Add, remove or position the text used to label the chart axes.
- **Legend:** Add, remove or position chart legend.
- **Data Labels:** Use data labels to label the values of individual chart elements.
- **Data Table:** Add a data table to the chart.

✔ **Tip:** Different chart types contain different chart labels, so some of the options listed above might not be available.

3. Click the button for the label you want to add in the Labels group.

A list of options related to the selected label appears.

4. Select an option from the list.

The label is applied to the chart.

✔ **Tip:** If you don't see a label option that suits you, click the **More Options** button to fine-tune the label to meet your needs.

Edit label text

Change the placeholder text found in the chart and axis title labels. You cannot edit data, such as series labels.

1. Select the chart.
2. Click the label twice

A blinking cursor appears inside the label, which indicates that it is in editing mode.

3. Edit the label text.

👉 **Other Ways to Edit Label Text:**
Right-click the label and select **Edit Text** from the contextual menu. Edit the text as necessary.

Exercise

- **Exercise File:** Destinations8-9.docx
- **Exercise:** Move the chart legend to the right of the chart.

Change the Chart Title to “Travel Destinations”.

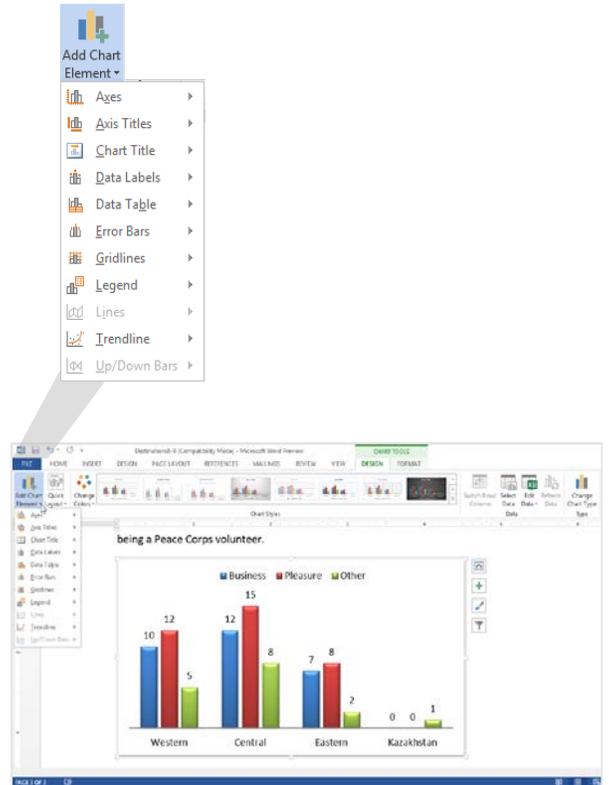


Figure 8-20: Use the Labels group to add labels, or change the position of labels in the chart. The chart legend has been moved to the bottom of the chart here.

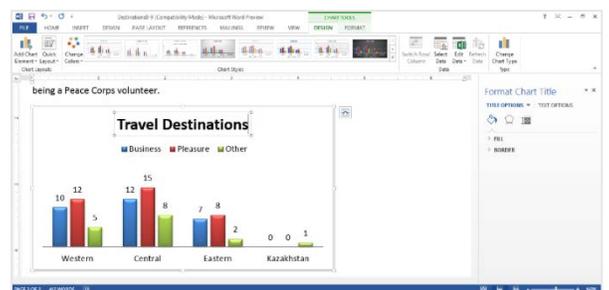


Figure 8-21: Editing the Chart Title label.

Formatting Chart Elements

If none of Word’s default chart layouts and styles meet your needs, you can format chart elements—such as shapes and axes—individually.

Format a chart element

You can use the **FORMAT** tab to change the look of individual chart elements.

1. Under **CHART TOOLS** on the Ribbon, click the **FORMAT** tab and click the **Format Selection** button in the Current Selection group.

The Format Data Series pane appears.

- **Other Ways to Select a Chart Element:**
Click a chart element to select it.

To format the selected chart element, you can use the commands in the groups of the Format tab, as shown in **Table 8-5: FORMAT Tab Commands**.

2. Select the formatting command you want to use, and any additional options as necessary.

- **Other Ways to Format a Chart Element:**
Right-click the element and select **Format Data Series** from the contextual menu. Make your selections in the dialog box and click **Close** when you’re finished.

Delete a chart element

If you decide you don’t need a specific chart element, you can delete it.

1. Select the chart element you want to delete.
2. Press **<Delete>**.

- **Other Ways to Delete a Chart Element:**
Right-click the chart element and select **Delete** from the contextual menu.

✔ Tips:

- ✔ To change the location of a chart element, click and drag the chart element to a new location in the frame.
- ✔ Many chart elements cannot be resized individually.

Exercise

- **Exercise File:** Destinations8-10.docx
- **Exercise:** Change the Series “Business” chart element to an orange color and then delete the Chart Title on page 3.



Figure 8-22: The chart with the “Business” series color changed to orange.

Table 8-5: FORMAT Tab Commands

Current Selection	Select and format chart elements, and reset formatting of the individual element to match the chart’s style.
Shape Styles	Select a style from the Shape Styles gallery. Or, click the Shape Fill, Shape Outline, or Shape Effects button list arrows to select additional options.
WordArt Styles	Select an element that includes text or numbers and select a style from the WordArt Styles gallery. Or, click the Text Fill, Text Outline, or Text Effects button list arrows to select additional options.
Arrange	Click the Selection Pane button to display the Selection pane, where you can select individual chart elements to format. Use the other commands in this group to change the order of overlapping elements or adjust their alignment and distribution.

Formatting a Chart Area

To help your chart stand out from other text in your document, you can format the chart area. You can add background color to a chart, add a border to a chart, or add other text effects to make your chart look even better.

1. Select the chart you wish to format.

The CHART TOOLS tab appears on the Ribbon.

2. Under CHART TOOLS on the Ribbon, click the **FORMAT** tab and click the **Format Selection** button in the Current Selection group.

The Format Chart Area pane appears.

 **Other Ways Open the Format Chart Area Dialog Box:**

Right-click the chart and select **Format Chart Area** from the contextual menu.

3. Select the formatting options you would like to use.

Your chart with the new formatting appears in the document.

Exercise

- **Exercise File:** Destinations8-11.docx.
- **Exercise:** Apply a solid, 1” black line to the chart area

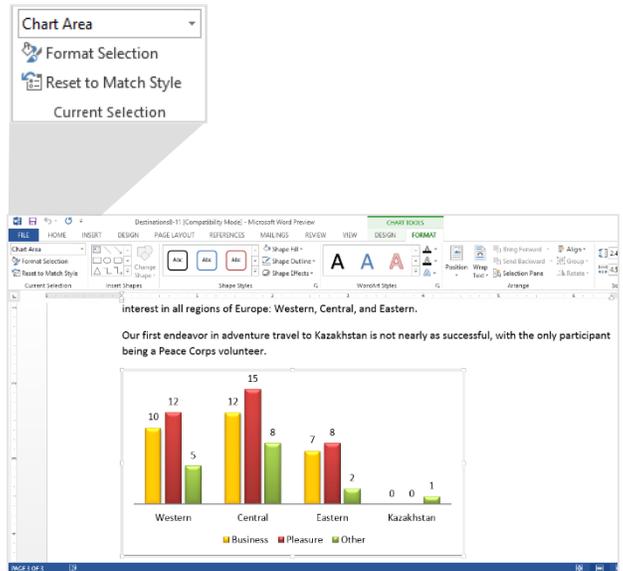


Figure 8-23: Select the chart and use the commands on the FORMAT tab to format your chart.

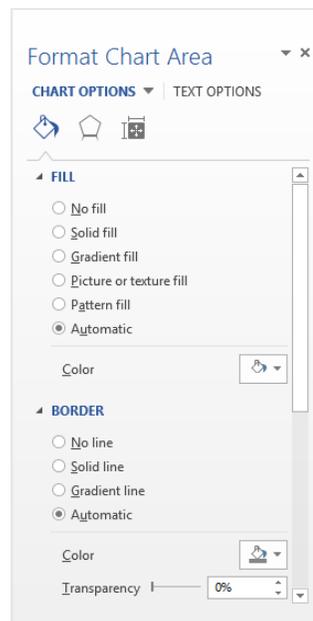


Figure 8-24: The Format Chart Area pane.

Using Chart Templates

After you've customized your chart, you can save that chart as a chart template. Saving a chart as a chart template lets you apply the chart's formatting to another chart with new data.

Save a chart as a chart template

1. Select the chart you want to save.
2. Right-click the chart.

The contextual menu appears.

3. Click **Save as Template...** in the contextual menu.

The Save Chart Template dialog box appears.

4. Click the **File name** text box, enter a name for the template, and click **Save**.

The chart is saved as a template.

Apply a chart template to a chart

After you insert a new chart into your document, you can apply a chart template to the new chart.

1. Select the chart to which you want to apply the template.

The CHART TOOLS tabs appear on the Ribbon.

2. Under CHART TOOLS on the Ribbon, click the **DESIGN** tab and click the **Change Chart Type** button in the Type group.

The Change Chart Type dialog box appears.

3. Select **Templates**.

A list of your saved templates appears.

4. Select the chart template you wish to use and click **OK**.

The chart template is applied to the selected chart.

Exercise

- **Exercise File:** Destinations8-12.docx
- **Exercise:** Save the current chart as a chart template called "Destinations Chart Template".

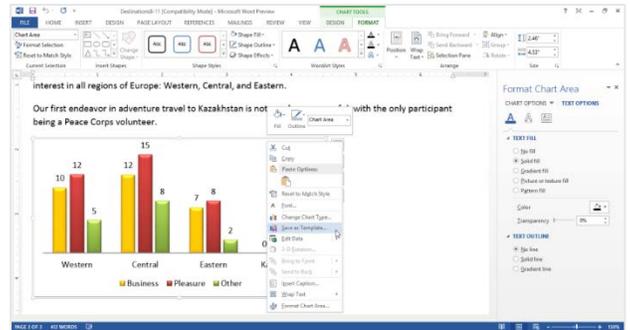


Figure 8-25: Save a chart as a template to reuse the chart with new data.

Find your templates in the Templates folder.

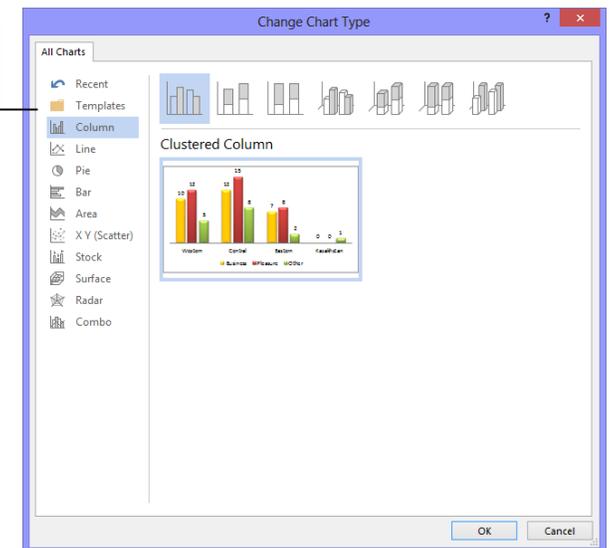


Figure 8-26: The Change Chart Type dialog box.

Changing Chart Type

Different types of charts are better for presenting different types of information. For example, a column chart is great for comparing values of different items, but not for illustrating trends or relationships.

If you find that a chart you've created isn't the best fit for your data, you can switch to a different chart type.

1. Select the chart.
2. Under CHART TOOLS on the Ribbon, click the **DESIGN** tab and click the **Change Chart Type** button in the Type group.

The Change Chart Type dialog box appears.

3. Select a chart type from the list.
A number of options are available under each chart type.
4. Select a chart.
5. Click **OK**.

The chart type is changed.

- 🔍 **Other Ways to Change Chart Type:**
 Right-click the chart frame and select **Change Chart Type** from the contextual menu. Select a new chart type and click **OK**.

✔ **Tip:**

- ✓ Changing chart type only changes how data is displayed; it does not alter the data itself.

Exercise

- **Exercise File:** Destinations8-13.docx
- **Exercise:** Change the chart on page 3 to 3-D Clustered Column chart.

Change Chart Type button

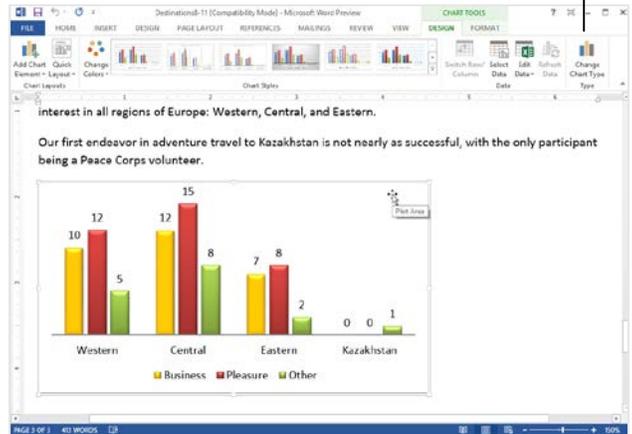


Figure 8-27: The updated chart.

Working with WordArt, SmartArt, and Charts Review

Quiz Questions

- 1.
2. You cannot reposition WordArt once it has been inserted. (True or False?)
3. You must open the WordArt dialog box to edit WordArt text. (True or False?)
4. Which of these WordArt elements can you format?
 - A. Text color
 - B. Text size
 - C. Font type
 - D. All of the above
5. You can add text to a SmartArt graphic simply by clicking a bullet in the Text pane and typing your text. (True or False?)
6. The SmartArt feature lets you design your own clip art. (True or False?)
7. How do you remove a shape from a SmartArt graphic?
 - A. Click the SmartArt Tools group on the ribbon and select Uninsert.
 - B. Press <Ctrl> + <R>.
 - C. Select the shape and press the <Delete> key.
 - D. Under SmartArt Tools on the Ribbon, click the Erase Shape button.
8. When you replace a shape in SmartArt, the existing text is deleted and must be re-entered. (True or False?)
9. You can change the layout, color, or style of a SmartArt graphic by clicking:
 - A. The Design tab under SmartArt Tools on the Ribbon.
 - B. The Graphics button under Formatting on the Ribbon.
 - C. The Format menu on the Images toolbar.
 - D. Any of these options will let you change the layout, color or style of a SmartArt graphic.
10. If you don't have Office Excel installed, you cannot insert a chart into a Word document. (True or False?)
11. Which of the following type of charts is not available to insert into a Word document?
 - A. Pie Chart
 - B. Doughnut Chart
 - C. Bar Chart

- D. All of these charts are available to insert into a Word document.
12. Clicking and dragging a sizing handle around a chart will:
A. Change the chart layout.
B. Change the chart style.
C. Change the chart shape or size
D. Show all available layouts
13. To label the values of individual chart elements, add:
A. Axis Titles.
B. Data Labels.
C. Chart Titles.
D. Table Labels.
14. You can format a chart element by right-clicking the element and selecting Format from the contextual menu. (True or False?)
15. You cannot add a border to a chart. (True or False?)
16. What is the easiest way to save a chart so you can use it in another document?
A. Copy and paste the chart into the new document.
B. Save the chart as a chart template.
C. You cannot reuse a chart in a new document.
D. Create a chart in Excel and link it to the new document.
17. When you change the chart type:
A. The data changes as well.
B. The data is automatically deleted.
C. The data stays exactly the same.
D. Data options are offered in a Change Chart Type contextual menu.

Quiz Answers

- 1.
2. False. You can reposition WordArt once it has been inserted.
3. False. You can edit WordArt text by placing the insertion point where you wish to add or delete text and editing the text as necessary.
4. D. You can format a WordArt object's text color, text size, and font type.
5. True. You can add text to a SmartArt graphic by clicking a bullet in the Text pane and typing.
6. False. The SmartArt feature lets you create and customize designer-quality diagrams.
7. C. To remove a shape from a SmartArt graphic, select the shape and press the <Delete> key.
8. False. When you replace a shape in SmartArt, the text in the shape is not removed or changed.
9. A. You can change the layout, color, or style of a SmartArt graphic by clicking the Design tab under SmartArt Tools on the Ribbon.

10. False. If you do not have Office Excel installed, you can enter chart data onto a Microsoft Graph datasheet instead of an Excel worksheet.
11. D. You can insert Pie Charts, Doughnut Charts, and Bar charts into a Word document.
12. C. Clicking and dragging a sizing handle around a chart will change the chart's shape or size.
13. B. To label the values of individual chart elements, add data labels.
14. True. You can format a chart element by right-clicking the element and selecting Format from the contextual menu
15. False. You can add a border to a chart by formatting the chart area.
16. B. You can save a chart as a chart template. This allows you to change the data, but reuse the chart's formatting and styles.
17. C. When you change the chart type, the data stays exactly the same.

Working with Tables

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Tables rank right up there with the spell checker as one of the neatest word processing features. A table neatly arranges text and data in a grid, organized by columns and rows. Once you have entered information in a table, you can do all kinds of things with it. For example, you can sort the information alphabetically or numerically; add and delete columns and/or rows; and make your table stand out by formatting it with border, shading, and color options. Tables can be used in place of tab stops to organize and layout information in an attractive, organized manner.

As powerful as tables are, most people don't know how to use them effectively, if at all. Tables are so important that this entire chapter is devoted to helping you become a table expert.

Using Exercise Files

This chapter suggests exercises to practice the topic of each lesson. There are two ways you may follow along with the exercise files:

- Open the exercise file for a lesson, perform the lesson exercise, and close the exercise file.
- Open the exercise file for a lesson, perform the lesson exercise, and keep the file open to perform the remaining lesson exercises for the chapter.

The exercises are written so that you may “build upon them”, meaning the exercises in a chapter can be performed in succession from the first lesson to the last.

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Creating a Table

Tables are very useful tools in creating and formatting documents. For example, with a table you can:

- **Align Text, Numbers, and Graphics:** Tables make it easy to align text, numbers, and graphics in columns and rows. Many users prefer using tables to align text instead of tab stops, because text can wrap to multiple lines in a table.
- **Create a Form:** You can use tables to store lists of telephone numbers, clients, and employee rosters.
- **Share Information:** You can use tables to share information between programs. For example, you can copy and paste a table's information into a Microsoft Excel worksheet or Access database.
- **Create a Publication:** Tables make it easier to create calendars, brochures, business cards, and many other publications.

Insert a table

To create a table, you must first specify how many columns (which run up and down) and rows (which run left to right) you want to appear in your table. Cells are small, rectangular-shaped boxes where the rows and columns intersect. The number of columns and rows determines the number of cells in a table.

If you don't know how many columns and rows you want in your table, take an educated guess—you can always add or delete columns and rows later.

1. Click the **INSERT** tab on the Ribbon and click the **Table** button in the Tables group.

A grid appears, representing rows and columns in the table. As you move the cursor inside the grid, the number of rows and columns that will appear in the table is updated at the top of the list. A preview of how the table will look in the document also appears as you drag your cursor across the grid.

2. Select the number of columns and rows you want to create using the new table grid.

The table is inserted with the number of columns and rows you selected.

Other Ways to Insert a Table:

Click the **INSERT** tab on the Ribbon and click the **Table** button in the Tables group. Select **Insert Table** from the list and select the number of columns and rows you want to use in the Insert Table dialog box. Click **OK**.

Exercise

- **Exercise File:** None required.
- **Exercise:** Open a new Word document and insert a table that is three columns wide by four rows tall.

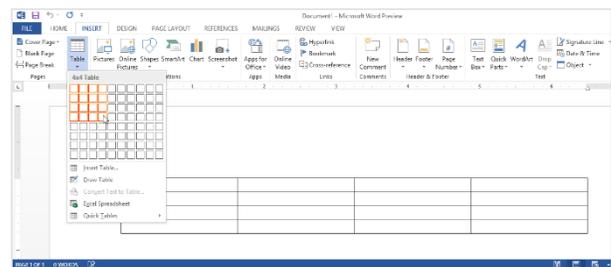


Figure 9-1: Inserting a table.

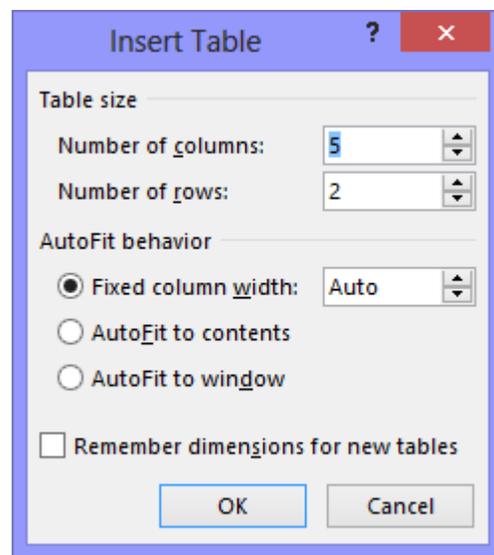


Figure 9-2: The Insert Table dialog box.

Working with a Table

In order to work with a table, you need to learn a few basic skills: how to move the insertion point between cells, how to enter or edit table data, and how to select items.

Move between cells

There are several ways to move between cells in a table:

- Click in a cell with the mouse.
- Use the up, down, left, and right arrow keys.
- Press <Tab> to move forward one field or cell, and press <Shift> + <Tab> to move back one field or cell.

Enter or edit information in a table

1. Click a cell in the table.

The insertion point appears in the cell.

2. Enter or edit text or numerical data as desired.

If you enter more text than fits in a cell, the cell height expands automatically to hold it.

Select cells, rows, columns, and tables

Just like other elements in Word, you have to select the parts of a table in order to work with them.

1. Position the insertion point in the cell, row or column you want to select.
2. Under TABLE TOOLS on the Ribbon, click the **LAYOUT** tab and click the **Select** button in the Table group.
3. Choose the table item you want to select: Cell, Column, Row or Table.

Other Ways to Select:

Cells: Click the left edge of the cell.

Multiple Cells: Drag across the cell, row, or column. Or select a single cell, row, or column and hold down the <Shift> key while you click another cell, row, or column.

Row: Click to the left of the row (outside of the table).

Column: Click the column's top border (the pointer will change).

Table: Click the move handle next to the table (must be in Print Layout view).

Exercise

- **Exercise File:** SalesReps9-2.docx
- **Exercise:** Practice moving the cursor around within the table cells.

Enter the following text in the three cells of the first row: Last, First, Sales. In the second row, enter: Jones, Marvin, 1200. In the third row, enter: McKenzie, Shandra, 1400. Select the third row.

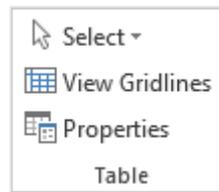


Figure 9-3: The Table group.

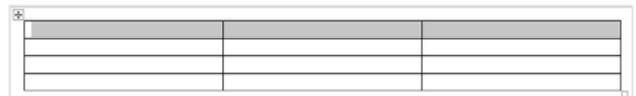


Figure 9-4: A table with the first row selected.

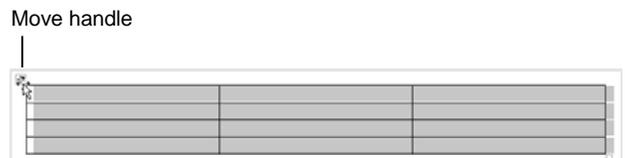


Figure 9-5: A table that is entirely selected.

Resizing and Moving a Table

You can quickly and easily resize or move a table in Word.

Resize a table

You can use the mouse to resize a table.

1. Make sure you are in Print Layout view.
2. Click anywhere inside the table, if necessary.

The table's resize handle appears in the lower right-hand corner of the table until the table is the desired size.

As you resize the table, a dotted outline appears to show you the new outline of the table.

Move a table

Moving a table is very similar to resizing it.

1. Make sure you are in Print Layout view.
2. Click anywhere inside the table, if necessary.

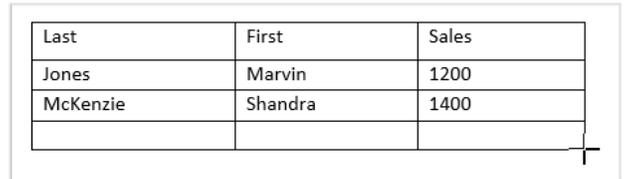
The table's move handle appears in the upper left-hand corner of the table.

3. Click and drag the table's **move handle** to a new location on the page.

As you move the table, a dotted outline appears to show you the new location of the table.

Exercise

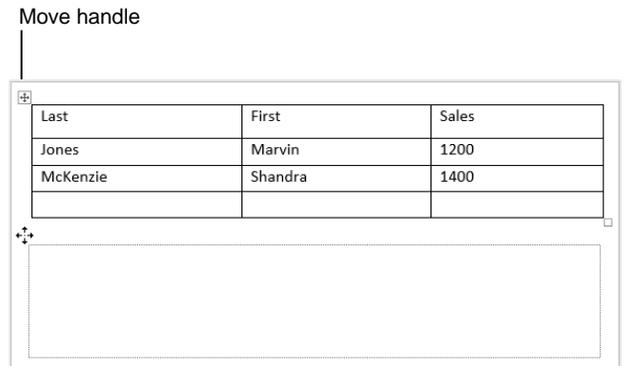
- **Exercise File:** SalesReps9-3.docx
- **Exercise:** Resize the table so that it is about five inches wide by one inch tall (use Word's rulers as a guide). Move the table down about one inch.



Last	First	Sales
Jones	Marvin	1200
McKenzie	Shandra	1400

Figure 9-6: Resizing a table.

Resize handle



Move handle

Last	First	Sales
Jones	Marvin	1200
McKenzie	Shandra	1400

Figure 9-7: Moving a table.

Adjusting Table Alignment and Text Wrapping

In the Table Properties dialog box, you can adjust the alignment of a table within the document, as well as the way document text wraps around a table.

1. Select the table.
2. Under TABLE TOOLS on the Ribbon, click the **LAYOUT** tab and click the **Properties** button in the Table group.

The Table Properties dialog box appears.

✔ **Tip:** Click the **Options**, **Positioning**, or **Borders and Shading** buttons for even more detailed table options.

3. Select the **Table** tab if it isn't already selected.
Here you can adjust table alignment within the document—select from Left, Center, or Right alignment—as well as whether or not you want the document text to wrap around the table.
4. Select an Alignment or Text wrapping option and click **OK**.

The table alignment or text wrapping is adjusted.

⚠ **Trap:** If your table is as wide as the page, or if you don't have any text in the surrounding document, you won't notice any difference between the alignment or text wrapping options, respectively.

✔ **Tip:** The Table Properties dialog box also includes tabs for Row, Column, and Cell properties. Here you can adjust row and column size, as well as individual cell size and alignment of cell contents.

Exercise

- **Exercise File:** SalesReps9-4.docx
- **Exercise:** Align the table in the center of the page.

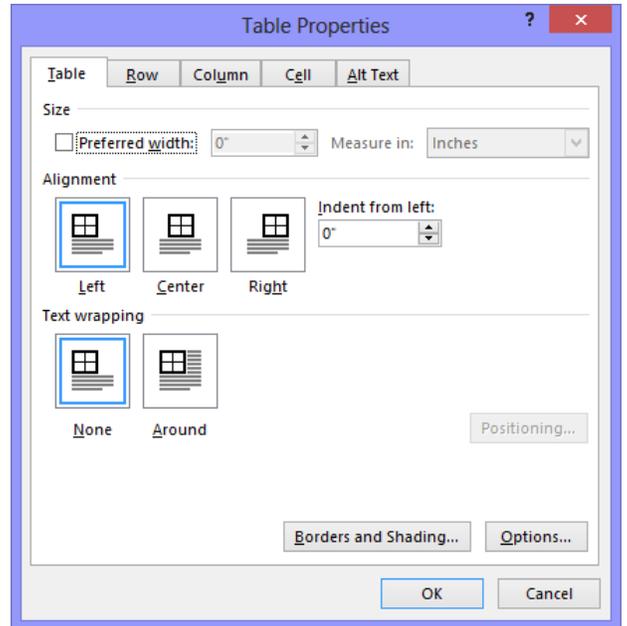


Figure 9-8: The Table Properties dialog box.

Working with Cell Formatting

In this lesson, you will learn how to align text horizontally and vertically in a cell, change text direction, and adjust cell margins.

Align cell contents

1. Select the cell(s) containing information you want to align.

The Design and Layout tabs appear under the TABLE TOOLS on the Ribbon.

2. Under TABLE TOOLS on the Ribbon, click the **LAYOUT** tab and click an alignment button in the Alignment group.

Other Ways to Align Cells:

Select the cell(s), right-click, select **Cell Alignment** from the contextual menu, and select an alignment.

Change text direction

1. Select the cell(s).

The Design and Layout tabs appear under the TABLE TOOLS on the Ribbon.

2. Under TABLE TOOLS on the Ribbon, click the **LAYOUT** tab and click the **Text Direction** button in the Alignment group.

The text direction for the selected cell(s) changes.

3. Click the **Text Direction** button again to cycle through available directions.

Other Ways to Change Text Direction:

Select the cell(s), right-click, and select **Text Direction** from the contextual menu. Select an orientation from the Text Direction dialog box.

Adjust cell margins

You can adjust how much space appears between a cell's contents and its borders by adjusting cell margins.

1. Click anywhere inside the table.

The Design and Layout tabs appear under the TABLE TOOLS on the Ribbon.

2. Under TABLE TOOLS on the Ribbon, click the **LAYOUT** tab and click the **Cell Margins** button in the Alignment group.

The Table Options dialog box appears.

Exercise

- **Exercise File:** SalesReps9-5.docx
- **Exercise:** Select the first row and change the text direction. Then undo the action.

Apply Bottom Center alignment to the first row of the table.

Change the top default cell margin to 0.05" and allow spacing between cells of 0.03".

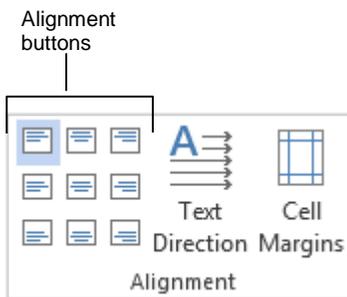


Figure 9-9: The Alignment group.

	Last	First	Sales
Jones	Marvin	1200	
McKenzie	Shandra	1400	

Figure 9-10: Changing text direction.

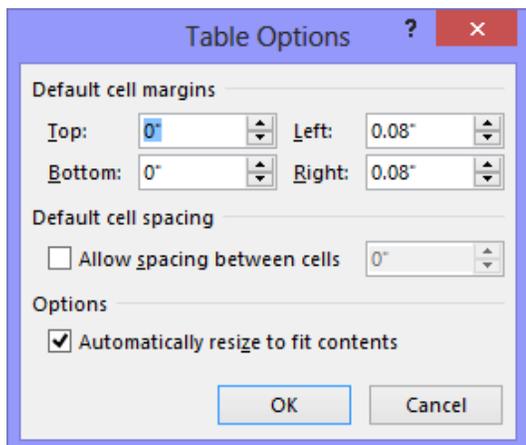


Figure 9-11: Changing table cell margins using the Table Options dialog box.

3. Adjust the cell margins and click **OK**.

Not only can you change the distance from the cell contents to the cell borders, but you can also separate individual cells from other cells in the table by adjusting the Default cell spacing area of the dialog box.

- ✔ **Tip:** Adjusting cell margins changes the margins of the current table and all subsequent tables. Your changes become the default settings for all tables.

Merging and Splitting Cells and Tables

You can adjust the number of cells that appear in a table by merging and splitting cells. You can also split a table into two tables.

Merge cells

The merge cells command combines several smaller cells into a single larger cell that spans the space that the previous cells occupied.

1. Select the cells you want to merge.
2. Under TABLE TOOLS on the Ribbon, click the **LAYOUT** tab and click the **Merge Cells** button in the Merge group.
 - Other Ways to Merge Cells:
Select the cells you want to merge, then right-click and select **Merge Cells** from the contextual menu.

Split a cell

Cells can also be broken up into several smaller cells by using the Split Cells command.

1. Select the cell you want to split.
2. Under TABLE TOOLS on the Ribbon, click the **LAYOUT** tab and click the **Split Cells** button in the Merge group.
 - Other Ways to Split a Cell:
Select the cell you want to split, then right-click and select **Split Cells** from the contextual menu.

Split a table

You can also split a table into two separate tables.

1. Select the table row where you want to split the table.

The row you select will become the first row of the new table.
2. Under TABLE TOOLS on the Ribbon, click the **LAYOUT** tab and click the **Split Table** button in the Merge group.

The table is split into two tables. If the new table overlaps or obstructs the original table, you may need to move the tables in order to view them.

Exercise

- **Exercise File:** SalesReps9-6.docx
- **Exercise:** Split the first cell in the fourth row of the table into two cells, then merge the two cells back together. Split the table so that the Shandra McKenzie row is the first row of the new table. Undo the split.

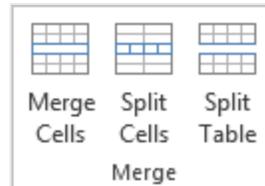


Figure 9-12: The Merge group.

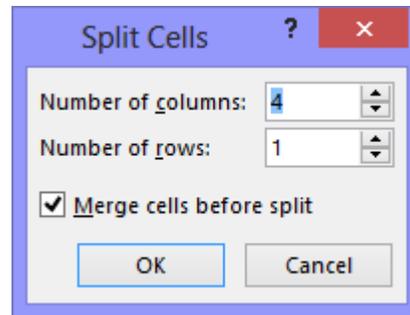


Figure 9-13: The Split Cells dialog box.

Before

Last	First	Sales
Jones	Marvin	1200
McKenzie	Shandra	1400

After

Last	First	Sales
Jones	Marvin	1200

Last	First	Sales
McKenzie	Shandra	1400

Figure 9-14: Before and after splitting a table.

Inserting and Deleting Rows and Columns

In this lesson, you will learn how to delete entire columns and rows and how to insert new columns and rows. You'll also learn how you can repeat the header row on tables that span multiple pages.

Insert a row

1. Place your insertion point in the row that is above or below where you want to insert the new row.
2. Under TABLE TOOLS on the Ribbon, click the **LAYOUT** tab and click the **Insert Above** or **Insert Below** button in the Rows & Columns group.

Other Ways to Insert a Row:

Place the insertion point in the bottom-right cell of the table and press <Tab> to insert a new row at the bottom of the table. Or, right-click a row, point to **Insert**, and select **Insert Rows Above** or **Insert Rows Below** from the contextual menu.

Insert a column

1. Place your insertion point in the table in the column that is left or right of where you want to insert the new column.
2. Under TABLE TOOLS on the Ribbon, click the **LAYOUT** tab and click the **Insert Left** button or the **Insert Right** button in the Rows & Columns group.

Other Ways to Insert a Column:

Right-click and point to **Insert** and select **Insert Columns to the Left** or **Insert Columns to the Right** from the contextual menu.

Delete a row or column

1. Select the column(s) or row(s) you want to delete.
2. Under TABLE TOOLS on the Ribbon, click the **LAYOUT** tab and click the **Delete** button in the Rows & Columns group.
3. Select **Delete Rows** or **Delete Columns** from the list.

Other Ways to Delete Rows or Columns:

Select the row(s) or column(s), right-click, and select **Delete Rows** or **Delete Columns** from the contextual menu.

- ✓ **Tip:** You can also delete individual cells in a table. Select the cell(s) you want to delete and

Exercise

- **Exercise File:** SalesReps9-7.docx
- **Exercise:** Insert a row between the first and second rows, then delete the row.

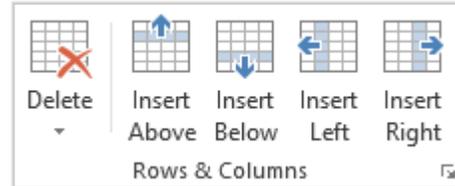


Figure 9-15: The Rows & Columns group.

click the **Delete** button in the Rows & Columns group. Select **Delete Cells** and click **OK**.

Repeat header rows

If you have a table that extends across several pages, you can repeat the header row at the top of each page of the table.

1. Select the rows you want to use as headings.
2. Click the **LAYOUT** tab under TABLE TOOLS on the Ribbon.
3. Click the **Repeat Header Rows** button in the Data group.
 - ✔ **Tip:** You can also keep a table row from breaking and separating the row's contents onto two pages. Right-click the table and select **Table Properties** from the contextual menu. On the Row tab of the Table Properties dialog box, deselect the **Allow row to break across pages** option.

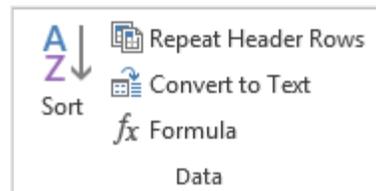


Figure 9-16: The Data group.

Adjusting Row Height and Column Width

When you create a table, all of the rows and columns are the same size. As you enter information in a table, you will quickly discover that some of the rows and columns are not large enough to properly display the information they contain.

Adjust row height

You will seldom need to change a row's height because, unless you specify otherwise, rows automatically expand to the tallest cell in the row—the one that contains the most lines of text.

1. Select the row(s).
2. Under TABLE TOOLS on the Ribbon, click the **LAYOUT** tab.
3. Click the **Table Row Height** text box in the Cell Size group and specify the row height.

Other Ways to Adjust Row Height:

In Print Layout view, click and drag the row's bottom border up or down.

- ✓ **Tip:** You can distribute selected rows evenly so they are the same height. Select the rows, click the **LAYOUT** tab under TABLE TOOLS, and click the **Distribute Rows** button in the Cell Size group.

Adjust column width

1. Select the column(s).
2. Under TABLE TOOLS on the Ribbon, click the **LAYOUT** tab.
3. Click the **Table Column Width** text box in the Cell Size group and specify the column width.

Other Ways to Adjust Column Width:

In Print Layout view, click and drag the column's right border to the left or right. Or, double-click the column's right border. Or, click the **AutoFit** button and select an option to automatically resize the columns to fit their contents or the size of the window.

- ✓ **Tip:** You can distribute columns evenly so that they are the same width. Select the columns, click the **LAYOUT** tab under TABLE TOOLS, and click the **Distribute Columns** button in the Cell Size group.

Exercise

- **Exercise File:** SalesReps9-8.docx
- **Exercise:** Adjust the third column's width to 1".

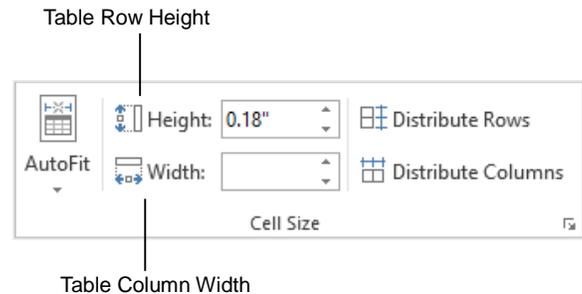


Figure 9-17: The Cell Size group.

Using Table Drawing Tools

In Word, you can draw and modify tables the same way you would use a pencil to draw a table on a piece of paper. You may find the table drawing tools to be especially helpful when creating or modifying complicated or irregular tables.

Draw borders

1. To draw a table from scratch, or add lines or borders to an existing table, click the **LAYOUT** tab under **TABLE TOOLS** on the Ribbon and click the **Draw Table** button in the Draw Group.

The pointer changes to look like a pencil.

2. Click and drag to draw boundaries, rows, columns, or table cells.

✔ **Tip:** Use the Line Style, Line Weight, and Pen Color commands in the Borders group on the **DESIGN** tab to determine how the borders appear.

Erase borders

1. Under **TABLE TOOLS** on the Ribbon, click the **LAYOUT** tab and click the **Eraser** button in the Draw group.

The pointer changes to look like an eraser.

2. Click and drag across table lines to erase the lines.
The border is erased.

Exercise

- **Exercise File:** SalesReps9-9.docx
- **Exercise:** Add a vertical line to the last cell of the first column so that the cell is split in half, then erase that line. Erase the vertical line in the fourth row that separates the first and second columns.

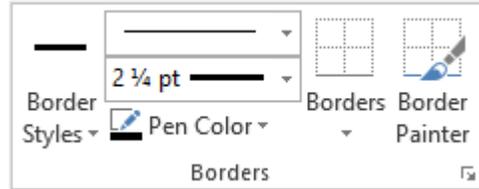


Figure 9-18: The Borders group.

Last	First	Sales
Jones	Marvin	1200
McKenzie	Shandra	1400

Figure 9-19: Erasing a table border.

Working with Sorting and Formulas

Word provides many options for working with table data. You can sort table data into a more useful order and even perform calculations by inserting formulas into table cells.

Sort table data

Word can sort data in a list alphabetically, numerically, or chronologically (by date). In addition, Word can sort information in ascending (A to Z) or descending (Z to A) order. You can sort an entire table or a portion of a table by selecting what you want to sort.

1. Select the cells or information you want to sort.
Usually, you'll want to select the header row along with the rows you want to sort.
2. Under TABLE TOOLS on the Ribbon, click the **LAYOUT** tab, and click the **Sort** button in the Data group.
The Sort dialog box appears.
3. Define how you want to sort the data and click **OK**.

Use formulas in a table

Word is not a spreadsheet program like Microsoft Excel, which is made to perform calculations, but it can do some simple arithmetic.

To enter your own calculations, called formulas, you can use the Formula dialog box, and you can refer to the cells in a table using cell references. A cell reference identifies where a cell is located in a table.

Although tables don't have visible headers identifying the rows and columns, every cell reference uses a letter (A, B, C and so on) to represent its column and a number (1, 2, 3 and so on) to represent its row. A1, B3, and D5 are all examples of cell references.

1. Place the insertion point in a blank table cell where you want to insert the formula.
2. Under TABLE TOOLS on the Ribbon, click the **LAYOUT** tab and click the **Formula** button in the Data group.
The Formula dialog box appears.
3. Enter the formula in the **Formula** box.

For example, =SUM(C2, C3) calculates the sum of table cells C2 and C3.

Exercise

- **Exercise File:** SalesReps9-10.docx
- **Exercise:** Select the first three rows and sort by the Sales column in descending order so that the salesperson with the most sales is listed first.
Enter a SUM formula in the last cell of the third column to calculate the total sales.

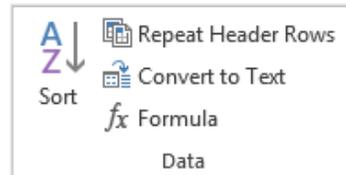


Figure 9-20: The Data group.

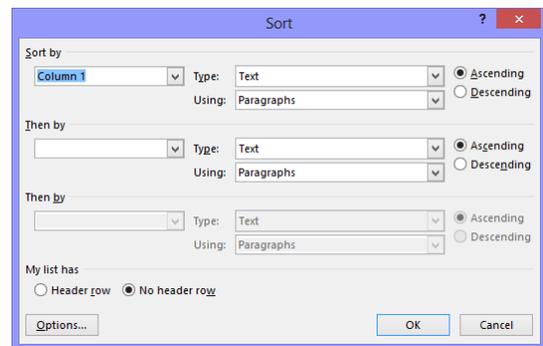


Figure 9-21: The Sort dialog box.

Before

Last	First	Sales
Jones	Marvin	1200
McKenzie	Shandra	1400

After

Last	First	Sales
McKenzie	Shandra	1400
Jones	Marvin	1200
Sum formula		2600

Figure 9-22: A table before and after sorting the table data and adding a formula to sum the third column.

Use the Number format list arrow to define how the formula result appears. Use the Paste function list arrow to build a formula using built-in functions.

4. Click **OK**.

The formula result appears in the cell.

✔ **Tips:**

- ✔ Remember: All formulas start with an equal sign (=), followed by a function name (such as SUM), followed by parentheses containing the location of the cells on which you want to perform the calculation.
- ✔ Besides regular cell references, you can use terms that describe the location of cells in a table, such as Above or Left, which reference all cells above or to the left, respectively, of the selected cell. For example, =SUM(ABOVE) totals all the cells above the selected cell in a table.
- ✔ If you change a value in a Word table, you'll need to recalculate the formulas manually.

Instead of entering specific cell references you want to sum, you can use a reference such as ABOVE, which indicates all the cells above the cell containing the formula.

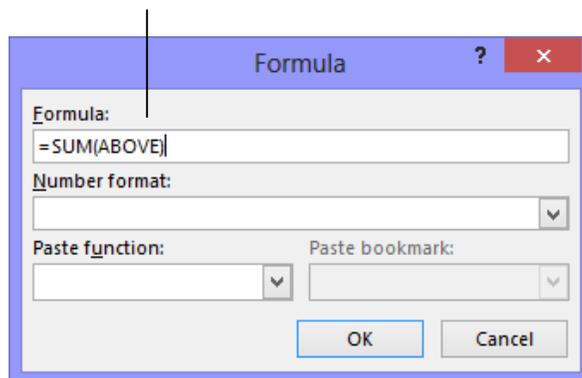


Figure 9-23: The Formula dialog box.

Working with Borders and Shading

Borders improve a table’s appearance, giving it a polished, professional look. Borders can make it easier to read the information in a table, especially when the information is numerical.

Adding shading to a table is similar to adding borders—you select the cells and then select shading options.

Apply a table border

When you create a table, Word automatically adds borders or lines around every cell in the table, but it’s very easy to change, add, or remove your table’s borders.

1. Select the cells where you want to adjust the borders.

✔ **Tip:** To select the whole table, click the table’s **Move** handle.

2. Under TABLE TOOLS on the Ribbon, click the **DESIGN** tab, and click the **Borders** list arrow.

Here you can choose from several border options.

✔ **Tip:** Select **No Border** to remove a border from the selection.

3. Select the border type you want to apply to the selected cells.

The border is applied.

🔍 **Other Ways to Apply a Table Border:**
Right-click the selection and select **Borders and Shading** from the contextual menu. Use the commands on the Borders tab in the Borders and Shading dialog box.

View gridlines

Gridlines are dashed lines that show you the location of the table cell borders. They do not appear by default. You can easily display and hide table gridlines, but the gridlines won’t be visible if the table is in the default table format because the black border covers the gridlines.

1. Select a table.
2. Under TABLE TOOLS on the Ribbon, click the **LAYOUT** tab and click the **View Gridlines** button in the Table group.

Gridlines are displayed in all tables in the document.

✔ **Tip:** Gridlines do not print.

Now let’s hide the gridlines.

Exercise

- **Exercise File:** SalesReps9-11.docx
- **Exercise:** Apply No Borders to the whole table.
Display gridlines.
Apply a Light Blue fill color (in the Standard colors area) to the first row.
Select the entire table again and apply All Borders.

Last	First	Sales
McKenzie	Shandra	1400
Jones	Marvin	1200
		2600

Figure 9-24: A table with no border and gridlines displayed.

3. Click the **View Gridlines** button again.

Gridlines are hidden.

Apply a fill color

Shading includes fill colors and also patterns that you can apply to table cells.

1. Select the cells where you want to apply a fill color.

The TABLE TOOLS tab appears on the Ribbon.

2. Click the **DESIGN** tab and click the **Shading** list arrow in the Table Styles group.

A palette of fill colors appears.

3. Select a fill color from the list.

The color is applied.

Last	First	Sales
McKenzie	Shandra	1400
Jones	Marvin	1200
		2600

Figure 9-25: A table with a fill color applied.

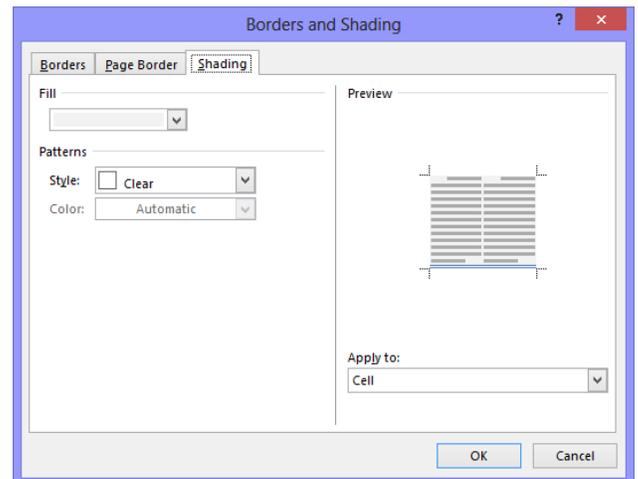


Figure 9-26: The Shading tab of the Borders and Shading dialog box.

Using Table Styles

You can easily spice up your tables by applying built-in table formatting styles.

Apply a table style

By default, a table is created with the Table Grid style, which includes a basic black border around each cell in the table. Word includes many built-in styles that include more interesting formatting.

1. Select the table.
2. Under TABLE TOOLS on the Ribbon, click the **DESIGN** tab.
Here you can see the Table Styles group. You can use the arrow buttons to scroll through the table styles in the gallery.
3. Select the style you want to use in the Table Styles group.
Tip: To display the entire Table Styles gallery, click the **More** button in the Table Styles group.

Remove a table style

You can easily remove table styles.

1. Select the table from which you want to remove the style.
2. Under TABLE TOOLS on the Ribbon, click the **DESIGN** tab and click the **More** button in the Table Styles group.
3. Select **Clear**.
The Table Normal style, which doesn't have any formatting, is applied.

Create a custom table style

You can also create a new, custom table style that meets your exact specifications.

1. Select the table you want to format with a style.
2. Under TABLE TOOLS on the Ribbon, click the **DESIGN** tab and click the **More** button in the Table Styles group.
3. Select **New Table Style**.
The Create New Style from Formatting dialog box appears.

Exercise

- **Exercise File:** SalesReps9-12.docx
- **Exercise:** Apply the “List Table 4 – Accent 1” table style.

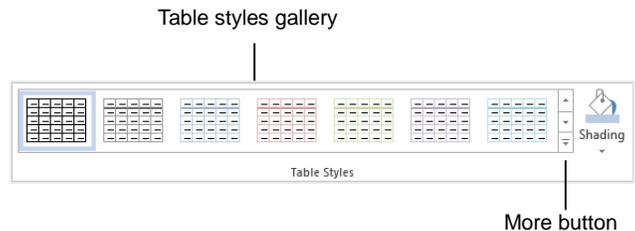


Figure 9-27: The Table Styles group.

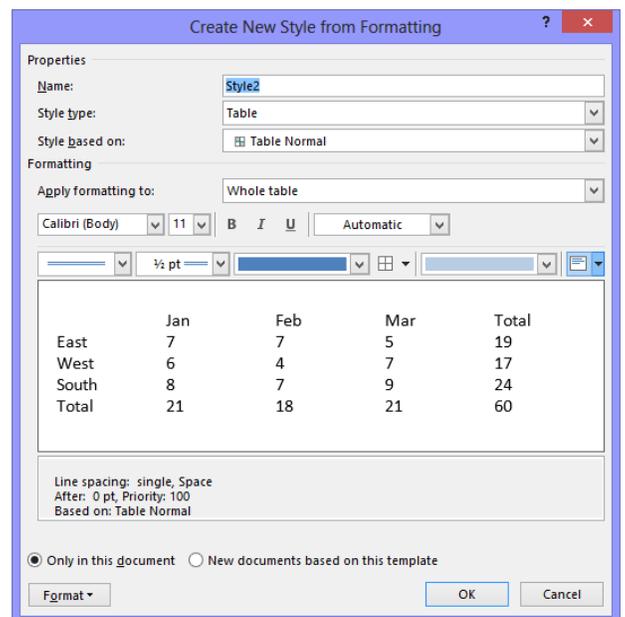


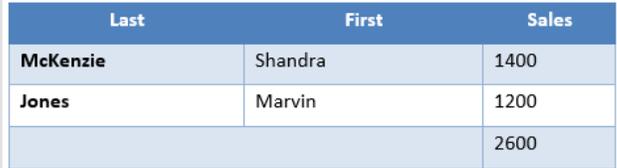
Figure 9-28: The Create New Style from Formatting dialog box.

4. Select the formatting attributes you want to use in the new table style and click **OK**.

The new style will appear in the Custom area of the Table Styles gallery in the Table Styles group.

✔ **Tips:**

- ✔ You can make the new table style available only in the current document or for new documents as well. Select either the **Only in this document** or the **New documents based on this template** option in the dialog box.
- ✔ You can also use styles in the Styles group on the HOME tab to apply styles to the text inside a table. These can be applied in addition to a table style.
- ✔ You can also modify an existing table style. Apply the style you want to modify, then click the **More** button in the Table Styles group and select **Modify Table Style**. Modify the table properties and click **OK**.



Last	First	Sales
McKenzie	Shandra	1400
Jones	Marvin	1200
		2600

Figure 9-29: A table with a style applied.

Using Table Style Options

Besides applying table styles, you can format individual table style elements.

1. Select the table.
2. Under TABLE TOOLS on the Ribbon, click the **DESIGN** tab.
The formatting options available in the Table Style Options group include:
 - **Header Row:** Displays special formatting for the first row of the table.
 - **Total Row:** Displays special formatting for the last row of the table.
 - **First/Last Column:** Displays special formatting for the first or last columns in the table.
 - **Banded Rows/Columns:** Displays odd and even rows and columns differently for easier reading.
3. Select the option(s) you want to use in the Table Style Options group.

Exercise

- **Exercise File:** SalesReps9-13.docx
- **Exercise:** Select the Total Row formatting option.

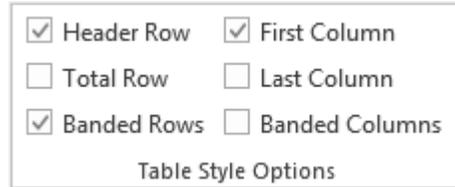


Figure 9-30: The Table Style Options group.

With banded rows

Last	First	Sales
McKenzie	Shandra	1400
Jones	Marvin	1200
		2600

Without banded rows

Last	First	Sales
McKenzie	Shandra	1400
Jones	Marvin	1200
		2600

Figure 9-31: A table with and without banded rows.

Converting or Deleting a Table

If you don't want table data to appear in a table any longer, preferring that the contents are part of the other text of the document, you can convert a table to text. You can also simply delete a table.

Convert a table to text

1. Place your insertion point in the table.
2. Under TABLE TOOLS on the Ribbon, click the **LAYOUT** tab and click the **Convert to Text** button in the Data group.

The Convert Table To Text dialog box appears.

3. Select the character you want to use to separate the text contained in each cell.

You can select one of the options to separate text or define your own separation character in the dialog box.

4. Click **OK**.

The table disappears and the table's contents appear as document text—although the text is contained inside a frame. The contents of each table cell are separated by the character you selected.

Delete a table

1. Place your insertion point in the table.
2. Under TABLE TOOLS on the Ribbon, click the **LAYOUT** tab and click the **Delete** button in the Rows & Columns group.

A list appears.

3. Select **Delete Table**.

The table is deleted from the document.

- **Other Ways to Delete a Table:**
Right-click the selection and select **Delete Table** from the contextual menu.

Exercise

- **Exercise File:** SalesReps9-14.docx
- **Exercise:** Convert the table to text, using tabs as separators.
Undo the action, then delete the table.

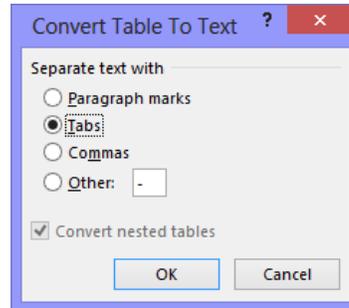


Figure 9-32: The Convert Table To Text dialog box.

Before

Last	First	Sales
McKenzie	Shandra	1400
Jones	Marvin	1200
		2600

After

Last	First	Sales
McKenzie	Shandra	1400
Jones	Marvin	1200
		2600

Figure 9-33: Before and after converting a table to text using tabs to separate the text.

Using Quick Tables

Insert a formatted table quickly by inserting one of Word's built-in Quick Tables.

1. Click the **INSERT** tab on the Ribbon and click the **Table** button in the Tables group.

A list of table options appears.

2. Point to **Quick Tables**.

A gallery of built-in tables appears.

As you point to each built-in table, a description of the table and how it might best be used is shown.

3. Select the table you would like to insert.

The table is inserted in the document. All you have to do is modify the table contents to your needs.

Tip:

- ✓ The selection of built-in tables is dependent on the current document theme.

Exercise

- **Exercise File:** None required.
- **Exercise:** Open a new document and insert the Calendar 2 Quick Table.

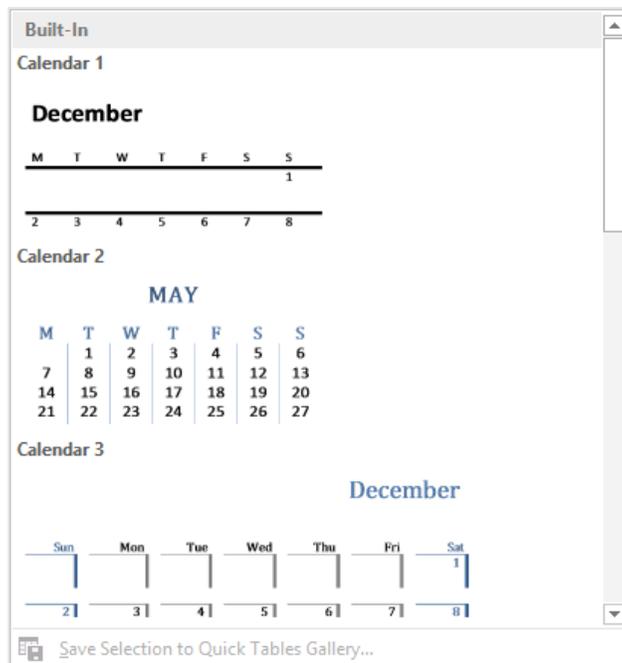


Figure 9-34: The Quick Tables gallery.

Working with Tables Review

Quiz Questions

18. Tables include _____.
 - A. rows
 - B. columns
 - C. cells
 - D. all of these
19. You can press the arrow keys to move between cells in a table. (True or False?)
20. Once you create a table, you cannot change its size. (True or False?)
21. You can adjust table alignment and text wrapping in the _____.
 - A. Table Options dialog box
 - B. Table Properties dialog box
 - C. Tables dialog box
 - D. Table Alignment dialog box
22. When adjusting cell margins, not only can you change the distance from the cell contents to the cell borders, but you can also separate individual cells from other cells in the table. (True or False?)
23. Which of the following is NOT a button found in the Merge group on the Layout tab.
 - A. Split Cells
 - B. Split Table
 - C. Merge Table
 - D. Merge Cells
24. You can insert a row above, but not below, a row you've selected. (True or False?)
25. Table rows automatically expand to the tallest cell in the row—the one that contains the most lines of text. (True or False?)
26. When you use the Draw Table tool, the mouse pointer changes to a pencil icon. (True or False?)
27. Which of the following can you NOT do in the Formula dialog box?
 - A. Use the Number format list arrow to define how the formula result appears.
 - B. Use the Paste function list arrow to build a formula using built-in functions.
 - C. Sort a column of numbers.
 - D. Enter a formula.
28. Table gridlines appear by default. (True or False?)

29. Click the _____ button to expand the Table Styles gallery.
- A. More
 - B. Open
 - C. Expand
 - D. Gallery
30. Which of the following is NOT an option in the Table Style Options group?
- A. Header Row
 - B. Total Row
 - D. Title Row
31. The Delete button used to delete a table is found in the _____ group.
- A. Table
 - B. Rows & Columns
 - C. Data
 - D. Merge
32. Click the Quick Parts button on the Insert tab of the Ribbon to insert a Quick Table into a document. (True or False?)

Quiz Answers

- 1.
2. D. Tables include rows, columns, and cells.
3. True. Using the arrow keys is one of a few different ways to move between cells in a table.
4. False. You can easily resize a table in Word.
5. B. You can adjust table alignment and text wrapping in the Table Properties dialog box.
6. True. You can adjust the margins between cells and borders and between other cells.
7. C. Merge Table is not a button found in the Merge group on the Layout tab.
8. False. You can insert a row above or below a row you've selected.
9. True. Table rows automatically expand to the tallest cell in the row.
10. True. When you use the Draw Table tool, the mouse pointer changes to a pencil icon.
11. C. You cannot sort a column of numbers in the Formula dialog box.
12. False. Table gridlines do not appear by default.
13. A. Click the More button in the Table Styles group to expand the Table Styles gallery.
14. D. Title Row is not an option in the Table Style Options group.
15. B. The Delete button used to delete a table is found in the Rows & Columns group.
16. False. Click the Tables button on the Insert tab of the Ribbon to insert a Quick Table into a document.

Working with Mailings

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Here's a secret for you: your dentist probably didn't have someone manually type that check-up reminder you received this month. And no one manually typed your weekly Publisher's Clearing House sweepstakes letter addressed to you either. A process known as mail merge has created these "personalized" letters.

Mail merge letters are used to send the same or similar documents to many different people at once. Since they contain the recipient's name, address, and other information, mail merge letters feel more personal—just like Publisher's Clearing House: Bob Boyarksi, if you have the winning number, you are the winner of \$10 Million Dollars!

Performing a mail merge isn't a very difficult process, but it is a rather lengthy one. This chapter will take you step-by-step through the mail merge process.

Using Exercise Files

This chapter suggests exercises to practice the topic of each lesson. There are two ways you may follow along with the exercise files:

- Open the exercise file for a lesson, perform the lesson exercise, and close the exercise file.
- Open the exercise file for a lesson, perform the lesson exercise, and keep the file open to perform the remaining lesson exercises for the chapter.

The exercises are written so that you may "build upon them", meaning the exercises in a chapter can be performed in succession from the first lesson to the last.

An Overview of the Mail Merge Process

Mail merge letters are used to send the same or similar documents to many different people. Since they contain the recipient's name, address, and other information, mail merge letters feel more personal than letters that aren't specifically addressed to anyone.

Creating and performing a mail merge is a lengthy and multi-stepped process, but Microsoft has done a lot to make performing mail merges in Word user-friendly. If you become confused during one of the next lessons, come back here to see how the step you're on fits into the mail merge process.

Since this chapter primarily deals with mail merges, you may also want to take a look at **Table 10-1: Mail Merge Definitions**. You will be seeing these terms frequently in the upcoming lessons, so it's a good idea to become familiar with them.

Exercise

- **Exercise File:** None required.
- **Exercise:** Understand the steps of the mail merge process.

David Meche
200 Park Drive
Le Sueur, MN 56058

Dear David,

Thanks for your wonderful graduation gift of \$10. I am going

Step 1: Set up the Main Document

Select the type of document you want to create with the mail merge. You can create letters, e-mails, envelopes, labels, and directories. The main document contains the text that is the same in all of the merged documents.

First	Last
Joe	Smith
Sam	Nelson
Jill	Peck
Tracy	Olden
Brad	Potts
Jim	Lewis

Step 2: Select or Create a Data Source

The data source contains the information you want to appear in the main document. You can create a new data source, use an existing data source, or use a database as the data source.

<<First>> <<Last>>
<<Address>>
<<City, State, Zip>>

Dear <<First>>

Thanks for your wonderful graduation gift of <<Gift>>.

Step 3: Insert Fields

Write and/or edit the starting document and specify where you want to insert the information from your data source into your starting document.

Sam Nelson
Far Pine Drive
Chaska, MN 55437

Dear Sam,

Thanks for your wonderful graduation gift of <<Gift>>.

Step 4: Preview the Mail Merge

Preview how your document will appear when combined with the information in the data source.

Step 5: Complete the Mail Merge!

Merge the data from the data source into the merge fields in the document, creating a unique document for each record in the data source.

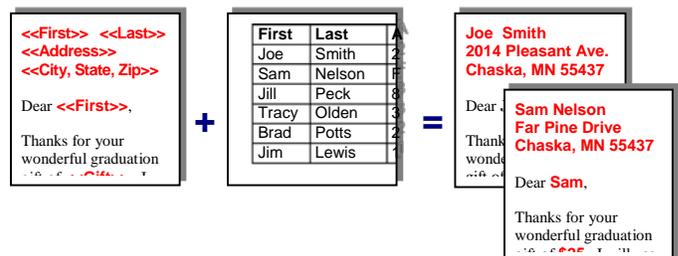


Table 10-1: Mail Merge Definitions

Starting Document	(Main Document) A document that contains the information that is the same for each merged document. The starting document contains the field names for the variable information, like the names and addresses that will be inserted.
Data Source or Recipients List	A file that contains the information to be inserted into the main document during a mail merge. For example, it has records containing the names and addresses of the people a mail merge letter is sent to.
Field	A data category that stores a specific piece of information. For example, the field LastName would only contain people's last names.
Record	A record is an entire set of data fields that relate to a single thing or person. For example, a single record would include information about a person's first and last names, address, phone number, and date of birth.
Merge Field	A merge field is where you want to insert the information from a data source into a main document. Merge fields appear with chevrons («») around them. An example would be: Dear «FirstName».
Address Block	A group of merge fields that make up the address block in a mail merge document. Word can automatically insert all the appropriate address fields at once, so that you don't have to insert the five or six merge fields yourself.
Greeting Line	A group of merge fields that make up the greeting line of a mail merge document, such as "Dear Mr. McDonald". Word can automatically insert all the appropriate greeting text and fields at once, so that you don't have to insert the text and required merge fields yourself.
Header Row	Data source information is stored in a table. The first row of the table is the header row and contains the field names for the data source. For example, FirstName, LastName, Address.

Step 1: Setting Up the Main Document

All mail merges in Word require two files: a main document and a data source. The main document contains the text that is the same in all of the merged documents. The first step in the mail merge process is specifying which type of mail merge document you want to create. Let's get started!

1. Open a blank document, or open the document you want to use as the main document.

If you open to a blank document, you can add text later in the process.

2. Click the **MAILINGS** tab on the Ribbon.

All the commands needed to perform a mail merge are presented on the Ribbon.

- ✔ **Tip:** You can also use the Mail Merge task pane, which leads you through the mail merge process step by step. To open the task pane, click the **Start Mail Merge** button in the MAILINGS tab on the Ribbon and select **Step by Step Mail Merge Wizard**.

3. Click the **Start Mail Merge** button in the Start Mail Merge group.

A list of document types appears:

- **Letters:** The basic content is the same in all the letters, but each one contains information that is specific to an individual recipient, such as name or address.
- **E-mail Messages:** Like a letter, the basic content is the same in all the letters, but each one contains information that is specific to an individual recipient.
- **Envelopes:** Creates envelopes that have the same return address, but different destination addresses.
- **Labels:** Creates labels for each of the recipients attached to the document.
- **Directory:** The same kind of information, such as name and description, is shown for each item, but the name and description in each item is unique. This type of document can be used for catalogs as well.

4. Select the type of main document you wish to use for the mail merge.

The main document is set up.

Exercise

- **Exercise File:** North Shore Mailing10-2.docx
- **Exercise:** Use the North Shore Mailing10-2.docx document to set up a Letter mail merge.

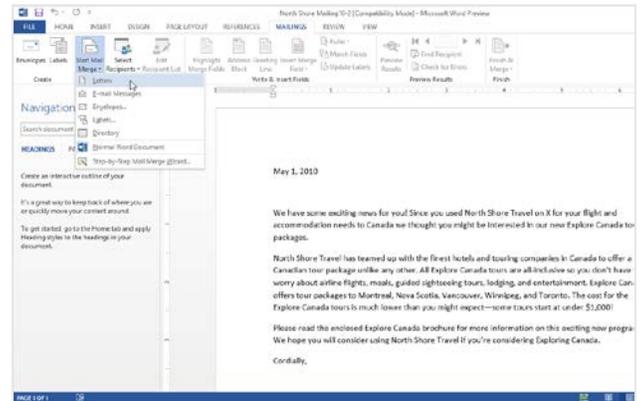


Figure 10-1: Selecting a document type for the main document of the mail merge.

Step 2: Creating a Data Source

The data source provides the information that is unique in mail merge. It provides the information that is unique to each recipient, such as their name and address.

Create a data source

If you do not have a list of recipients that you want to use for the mailing, you can easily create one.

1. Click the **Select Recipients** button in the Start Mail Merge group under the MAILINGS tab.

A list of options you can use for a data source appears.

2. Select **Type a New List**.

The New Address List dialog box appears.

3. Enter recipient information in the table.

Each row contains information that is unique for a single recipient. This is called an entry, or record. Each column contains the information for a field, or category, of information.

4. Click the **New Entry** button to add a new row for another recipient's information. Repeat until all recipients have been added.

Continue adding rows and entering information until all the recipients you want to include have been added.

- 🔗 **Other Ways to Add a Row:**
Press <Tab> at the end of a row.

5. Click **OK**.

The Save Address List dialog box appears. Save the data source so you can use it for future mailings and edit the data source as necessary.

- ✔ **Tip:** By default, the data source is saved in the My Data Sources folder in the Documents folder.

6. Enter a name for the data source in the File name text box and click **Save**.

The data source is connected to the main document, and will remain connected even when the document is closed.

Customize data source fields

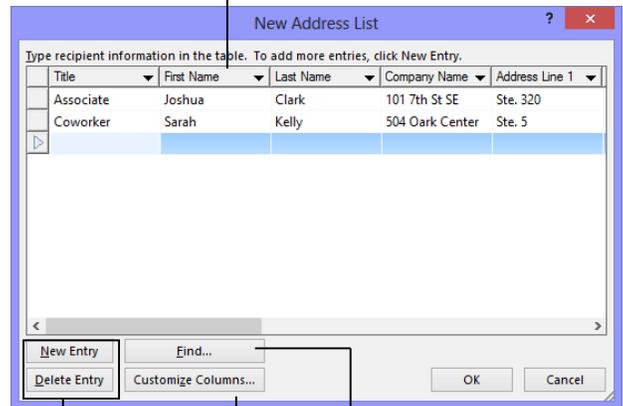
Customizing the data source fields, or columns, lets you control which information you want to include in each record, and therefore in the mail merge. Choose or create

Exercise

- **Exercise File:** North Shore Mailing10-2.docx
- **Exercise:** Create a new data source with the same fields shown in the image below.

Enter data for yourself and a friend so that there are two more records in the data source.

Use the column headers to filter and sort mail recipient records.



Add a new record

Delete this record

Specify criteria to find a specific record.

Add, rename, or delete mail merge fields.

Figure 10-2: Creating a new data source for the mail merge.

fields for each piece of information you want to have available in the mail merge.

1. Click the **Customize Columns** button to customize the fields in the data source.

The fields are the columns in the table, and the name of the field appears in the header row of the table. For example, if you know you need to use the people's first and last names, you can use the First Name and Last Name fields.

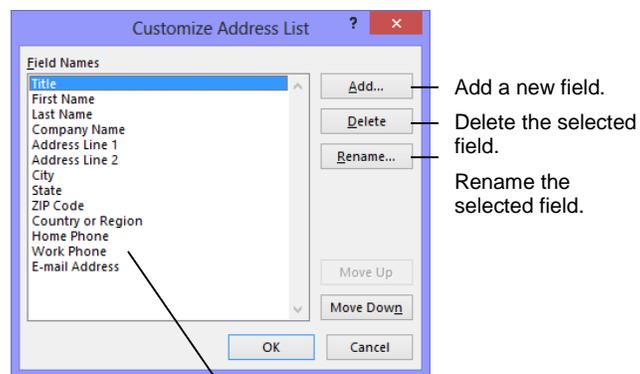
You can also add fields that are specific to your needs. For example, if you want to include the name of a spouse for a recipient, you can add Spouse First and Spouse Last fields.

2. Add, delete, or rename fields you want to use in the data source.

These fields will appear as columns in the data source table.

3. Click **OK**.

The fields appear as columns in the table.



Field names used in the data source file. Word automatically adds common fields to a new data source unless you remove or rename them.

Figure 10-3: Choose the fields you want to include in the data source with Customize Address List dialog box.

Selecting an Existing Data Source

There's no need to reinvent the wheel and create a new data source if one exists that contains the information you want to include in a mail merge.

Select an existing data source

If you already have a data source, such as an Access database, an Excel spreadsheet, or a delimited text file, you can use it for your mail merge.

1. Click the **Select Recipients** button in the Start Mail Merge group under the MAILINGS tab on the Ribbon.

A list of options you can use for a data source appears.

2. Select **Use an Existing List**.

The Select Data Source dialog box appears.

3. Navigate to the location of the data source you want to use.

4. Select the data source and click **Open**.

The data source is connected to the main document, and will remain connected even when the document is closed.

Use Outlook contacts

If you use Microsoft Outlook, you can select the names and addresses from your Contacts list and use them as the data source for your mail merge.

1. Click the **Select Recipients** button in the Start Mail Merge group under the MAILINGS tab.

A list of options you can use for a data source appears.

2. Select **Choose from Outlook Contacts**.

The Select Contacts dialog box appears. If there are several contact folders that contacts can be imported from, they are listed in the dialog box.

3. Select the contact folder you want to use as the data source and click **OK**.

The data source will remain connected to the document, even when the document is closed.

Exercise

- **Exercise File:** Canada tourists.mdb and North Shore Mailing10-2.docx
- **Exercise:** Connect the Canada tourists.mdb file to the main document.

Table 10-2: Types of Data Sources

Spreadsheet Files Microsoft Excel Lotus 1-2-3	You will need to specify the cell range or the entire file.
Database Files dBase Fox Pro Microsoft Access Microsoft Outlook	If the database contains more than one table, you will have to select the table you want to use. Data sources you have created previously in Word are database files.
Word Processing Files Microsoft Word WordPerfect	Records must be stored in a table or in a tab-delimited list.
Text Files	Must be a tab or comma delimited text file.

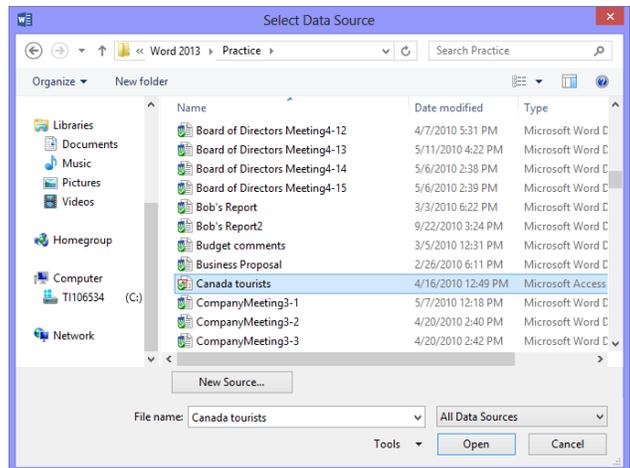


Figure 10-4: Select a data source to use for the mail merge.

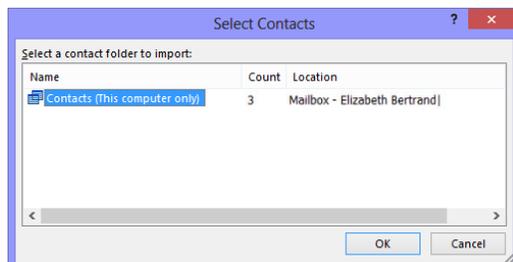


Figure 10-5: Select the folder you want to use for the data source.

Step 3: Inserting Merge Fields

After the main document is set and the recipient list is connected and edited, you are ready to insert the merge fields in the document. The merge fields are placeholders in the document for unique information from the recipients list. So when you put a merge field in the main document, information from that field will appear for the document that is unique to that recipient.

1. Place the insertion point where you want to insert a merge field.

The merge fields that are available for you to insert depend on the fields in the data source. There are three buttons you can use to insert merge fields in the main document:

- **Address Block:** This is a combination of several fields that you can use to insert the name and postal address of recipients. You can specify which information is included in the address block, such as how you want the recipient's name to appear and whether or not you want the country and region included in the address. A preview of how the information will appear for each of the recipients is also available here.
- **Greeting Line:** This is a combination of fields you can use to insert the recipient's name in the greeting line. This option also allows you to specify how you want the greeting line to appear. For example, choose a greeting ("To" or "Dear") and specify how you want the recipient's name to appear.
- **Insert Merge Field:** Insert a single field from the data source in the main document. When you click this button, a list of merge fields you can insert appears.

2. In the Write & Insert Fields group on the Ribbon, click the button for the field you want to insert.

When a merge field is inserted, chevrons (<< >>) surround the name of the field. This helps you distinguish the fields from the regular text in the document.

When the mail merge is performed, the information will not appear in chevrons.

3. Repeat for each merge field you want to insert.

Exercise

- **Exercise File:** North Shore Mailing10-3.docx and Canada tourists.mdb
- **Exercise:** Insert Address Block and Greeting Line fields after the date at the top of the letter.
Insert the TravelDate field in place of the X in the second sentence of the letter.

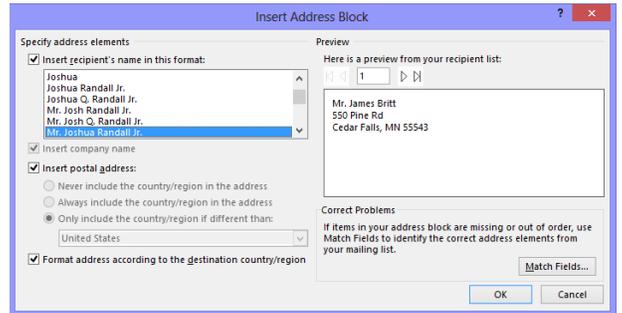


Figure 10-6: Choose how you want the address block to appear in the Insert Address block dialog box.

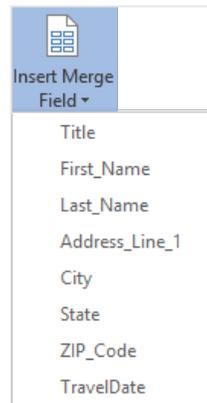


Figure 10-7: Insert a single merge field in the main document.

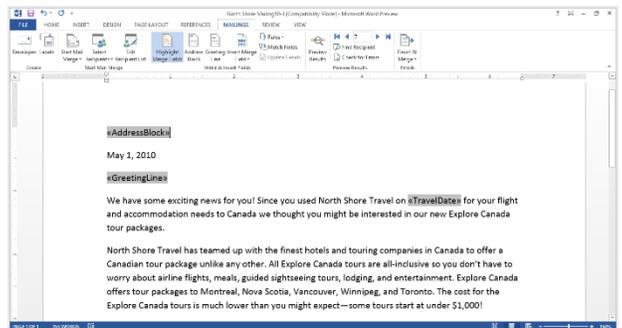


Figure 10-8: The main document with merge fields inserted. The merge fields are shaded gray and have chevrons << >> around them.

Inserting Rules Fields

In addition to merge fields, you can insert rules fields that customize your mail merge documents even more.

Tip:

- ✓ You'll probably want to skip this lesson unless you're really into mail merges; most people will never really need to use rules fields.

1. Place the insertion point where you want to insert a rules field.

2. Click the **Rules** button in the Write & Insert Fields group of the MAILINGS tab on the Ribbon.

A list of fields you can insert appears. Refer to **Table 10-3: Mail Merge Rules Fields** below for more information on the types of fields you can insert.

3. Select the field you want to insert in the main document.

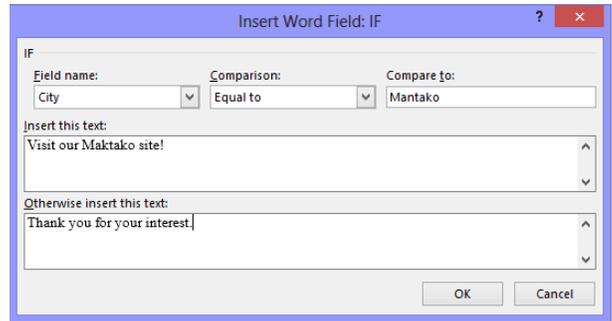
If a dialog box appears, enter the information necessary to insert the field.

Tip:

- ✓ When these fields are entered, they don't appear with chevrons (<< >>) around them, like other merge fields. You may not even know the field has been inserted until the mail merge is finished.

Exercise

- **Exercise File:** North Shore Mailing10-4.docx and Canada tourists.mdb
- **Exercise:** Insert an If...Then...Else... field at the end of the last paragraph in the letter. If the record has Mankato in the City field, insert this text: "Visit our Mankato office!" Otherwise, insert this text: "Thank you for your business."



First, specify what you want to test for. Then insert the text if the test is or is not true.

Figure 10-9: The Insert Word Field: IF dialog box.

Table 10-3: Mail Merge Rules Fields

Ask	Prompts for information from the user and assigns the response to a bookmark.
Fill-in	Prompts for information from the user as Word merges each data record with the main document. The response is printed in the specific form letter.
If... Then... Else...	Merges information only if a specified condition is met.
Merge Record #	Prints the number of the merged data record in the merged document.
Merge Sequence #	Counts the number of data records that were successfully merged with the main document. This could be helpful to calculate postage.
Next Record	Instructs Word to merge the next data record into the current merged document, rather than starting a new merged document. This is often used with labels and catalogs.
Next Record If	Compares two expressions. If the comparison is true, Word merges the next data record into the current merge document.
Set Bookmark	This field assigns specific information to a named variable, which is called a bookmark. In order for the information to appear in the document, insert a REF field that refers to the bookmark.
Skip Record If	This field compares two expressions. If the comparison is true, the current record is skipped. If the comparison is false, the current record is merged. (It may be easier to filter the recipient list.)

Step 4: Previewing a Mail Merge

Sometimes it is helpful to see what the data will look like once it has been inserted into a document, instead of only viewing the obscure merge field names. You can easily preview how the mail merge will appear before finishing the mail merge. This is encouraged to make sure the results appear as you want them to.

1. Click the **Preview Results** button in the Preview Results group of the MAILINGS tab.

The data from the first record is previewed in the document.

2. Use the preview results buttons to preview how records from the data source will appear when merged.

As you browse through the previews, you see how each record in the data source will appear when merged with the main document.

✓ Tips:

- ✓ Click the **Find Recipient** button in the Preview Results group to search for a specific recipient.
- ✓ You can simulate the mail merge process to make sure it will run smoothly before performing the final merge. Click the **Auto Check for Errors** button in the Preview Results group. Select the **Simulate the merge and report errors in a new document** option and click **OK**.
- ✓ Previewing the mail merge does not include preview rules fields.

Exercise

- **Exercise File:** North Shore Mailing10-5.docx and Canada tourists.mdb
- **Exercise:** Preview all the records in the mail merge.

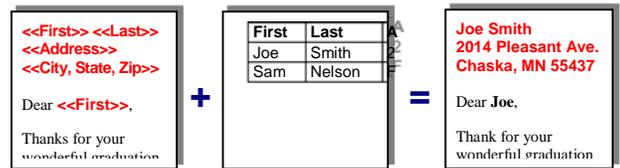


Figure 10-10: An example of how a data source record is merged into the letter.

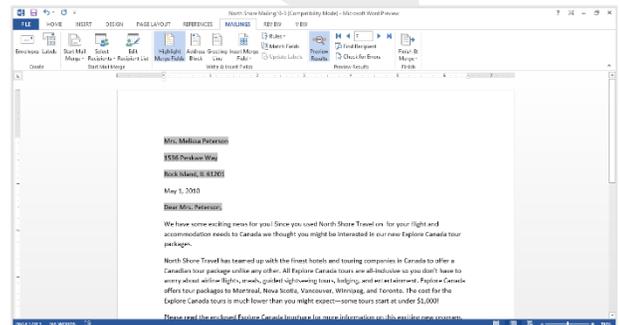
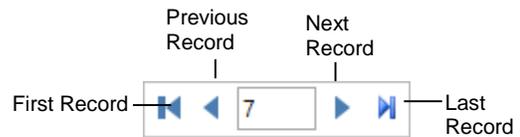


Figure 10-11: A preview of the merged main document. Use the buttons in the Preview Results group to cycle through previews of merged records in the data source.

Step 5: Completing the Mail Merge

After you've previewed how the main document and data source will merge, and everything looks correct, you are ready to complete the mail merge.

1. Click the **Finish & Merge** button in the Finish group of the MAILINGS tab on the Ribbon.

There are three different ways you can finish the mail merge:

- **Edit Individual Documents:** Puts the results of the mail merge in a new document. You are free to edit the results of the mail merge and save and print them, just like any other document.
- **Print Documents:** Merges records and sends them directly to the printer.
- **Send E-mail Messages:** Sends the mail merge as an e-mail message. This works best if you have used Microsoft Outlook Contacts as your data source.

2. Select the option you want to use to finish the mail merge.

A dialog box appears, asking which records you want to merge from the data source.

3. Select the records you want to merge and click **OK**.

Word merges the main document and the information from the data source into a new Word document, sends it to the printer, or creates an e-mail message.

Exercise

- **Exercise File:** North Shore Mailing10-5.docx and Canada tourists.mdb
- **Exercise:** Finish the mail merge to individual documents.

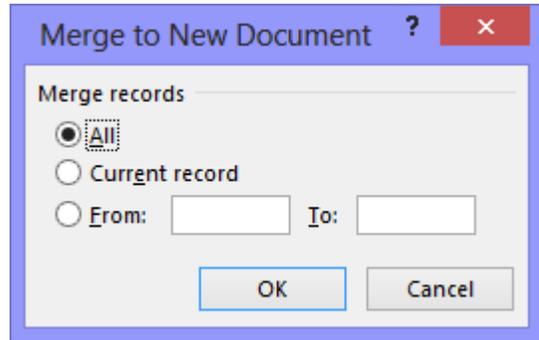


Figure 10-12: The Merge to New Document dialog box.

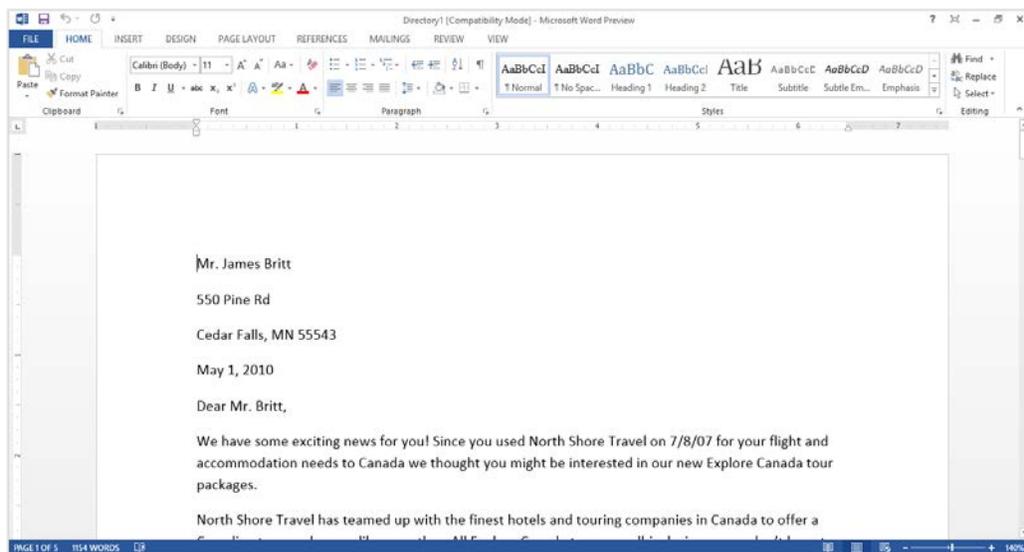


Figure 10-13: The new, merged document.

Editing the Data Source

Once you have connected a data source to the main document, you can choose which data source records you want to include in the mail merge, and you can also edit the data source to add records or change record information.

Select and sort recipients in the data source

You can change the recipients list without changing the data source by choosing which recipients you want to be included in the mail merge, and by rearranging and filtering the recipient list.

1. Click the **Edit Recipient List** button in the Start Mail Merge group on the MAILINGS tab.

The Mail Merge Recipients dialog box appears. By default, all the records in the data source will be included in the mail merge.

There are three ways you can work with the recipients list:

- **Select individual records:** If the list of recipients is relatively short, this is the easiest way to include or remove records from the data source. Records that are checked will be included; records that are not checked are removed.

Additionally, you can check or clear all the records at once by clicking the check box in the header row.

- **Sort records:** Click a column heading to sort the list by that field. If you want to use a more complex sorting method, such as sorting by several fields, you can:

Click the **Sort** link and choose the field(s) you would like to sort by. For example, you could alphabetically sort recipients by their last name within each state.

- **Filter records:** Filtering the list is useful for filtering out large groups of records.

Click the **Filter** link and choose the criteria you want to filter for. For example, to only include records from Texas, select State for the field, Equal to for the comparison, and TX in the compare to text box. Only records with TX in the State field are shown.

2. Edit the recipient list as necessary and click **OK**.

The recipient list is ready for the mail merge.

Exercise

- **Exercise File:** North Shore Mailing10-5.docx and Canada tourists.mdb
- **Exercise:** Sort the data source by last name. Deselect the Jeff Mitchell record. Apply a filter that only shows records from MN. Add a record to the data source using information about you.

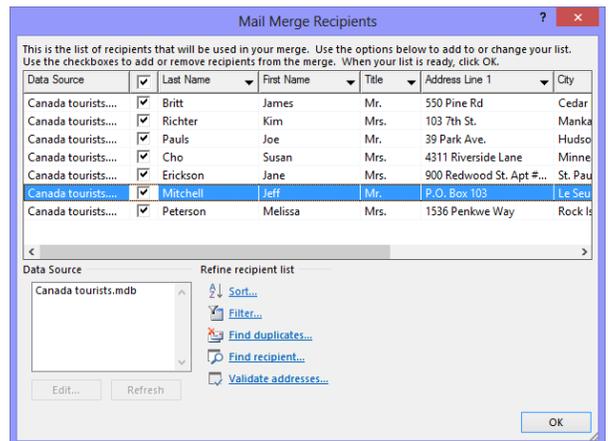


Figure 10-14: The Mail Merge Recipients dialog box. To sort the list, click the appropriate column heading. Use the check boxes to add or remove a recipient from the mail merge.

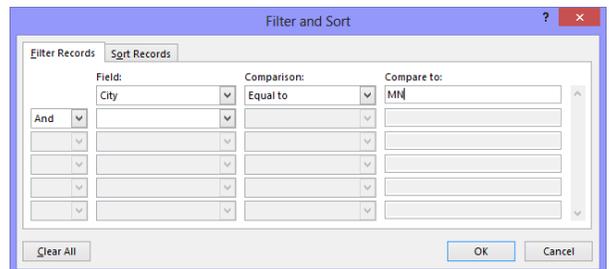


Figure 10-15: Specifying filter criteria for the data source.

Edit the data source

You can edit the data source to add recipients or to change record data after the data source has been connected to the main document.

1. Click the **Edit Recipient List** button in the Start Mail Merge group under the MAILINGS tab.

The Mail Merge Recipients dialog box appears.

2. Select the **data source** in the Data Source box in the bottom left corner of the dialog box.

You can only have one data source connected to a document at a time, so there should only be one item listed here.

Once the data source is selected, the two buttons below the box become available.

3. Click the **Edit** button.

The Edit Data Source dialog box appears.

You can edit the data in records, or use the buttons in the lower left corner of the dialog box to add or delete records, find a record, or customize the fields in the data source.

4. Edit the data source as necessary and click **OK**.

A dialog box appears, asking if you want to update these changes to the data source.

5. Click **Yes**.

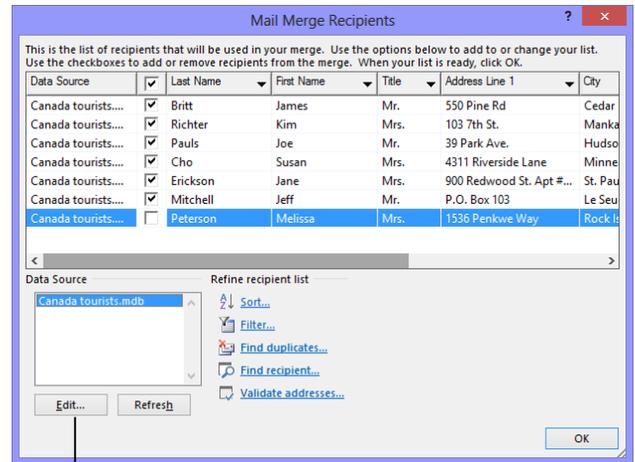
The Edit Data Source dialog box closes. You're back at the Mail Merge Recipients dialog box. You can still make changes to the data source before returning to the main document.

6. Click **OK**.

The recipient list edited and is ready for the mail merge.

Tip:

- ✓ Click the **Refresh** button under the Data Source box to update the recipient list if the data source has been changed since it was connected to the main document.



Select the data source in order to edit it.

Figure 10-16: The Mail Merge Recipients dialog box.

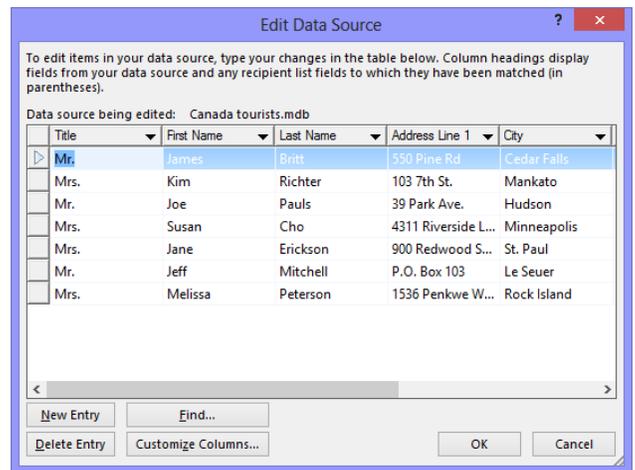


Figure 10-17: Edit the data source by changing previous entries or adding new ones.

Creating Labels

So far we've been using the mail merge feature to create formal letters, but you can also use it to create professional-looking mail labels or envelopes.

Create labels with the same information

This process shows you how to create a sheet of labels that contain the same information, for example, return address labels, or print a single label on a sheet.

1. Click the **MAILINGS** tab on the Ribbon and click the **Labels** button in the Create group.
The Envelopes and Labels dialog box appears.
2. Select the **Labels** tab and then click the **Address** box.
Enter the address you want to appear on the labels.
The address is what will be printed on the labels.
3. Choose **Full page of the same label** or **Single label** to select how you want to print the label.
If you choose Single label, indicate the label you want to print on by specifying the row and column where the label is located on the sheet.
4. Click the **Options** button to select the type of label being used.
The label package should tell you the type of label being used.
5. Click **Print** to print the labels, or click **New Document** to open a document that lists the address on a single page.
Use the New Document option if you want to do any formatting with the labels.

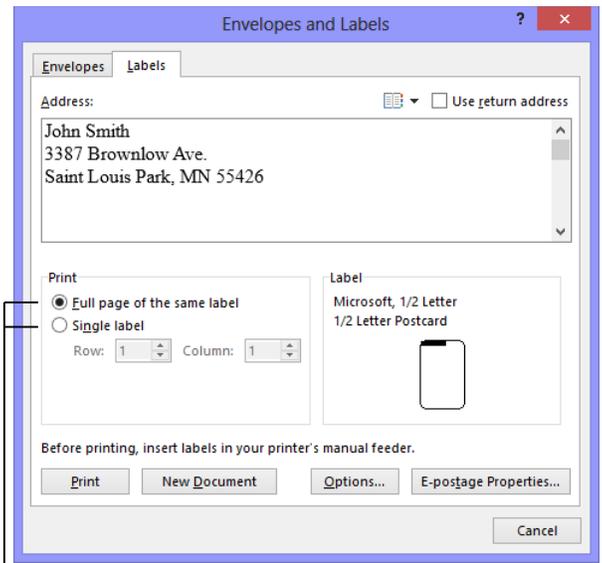
Create mail merged labels

Use the mail merge process to create labels from a data source.

1. Click the **MAILINGS** tab on the Ribbon.
The commands needed to create a mail merge appear.
2. Click the **Start Mail Merge** button in the Start Mail Merge group and select **Labels** from the list.
The Label Options dialog box appears.
3. Select the type of label you will be printing on and click **OK**.
The document changes into a table that is separated into cells that are the size of the labels.

Exercise

- **Exercise File:** Canada tourists.mdb
- **Exercise:** Open a new Word document.
Create a page of labels using your home address as the address.
Create labels using the records from the Canada tourists.mdb data source.



Print the same label on the full page, or specify the row and column coordinates for the label you want to print on.

Figure 10-18: The Labels tab of the Envelopes and Labels dialog box.

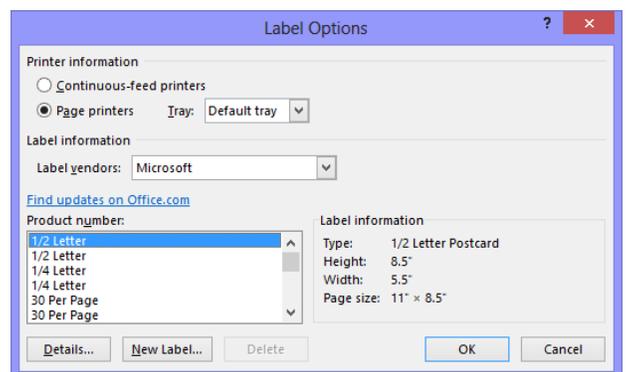


Figure 10-19: The Label Options dialog box. Select the type of label you want to use from the Product number. Click the Details button to change the dimensions of the label, or click New Label to create a custom-sized label.

Working with Mailings

The rest of the process is standard mail merge procedure.

4. Click the **Select Recipients** button in the Start Mail Merge group and select the data source you want to use.

Notice that once you select a data source, <<Next Record>> merge fields appear in all the label cells, except the first one. This allows the mail merge to merge the results from each record into each cell of the table, rather than repeating the information from the first record.

You can also edit the data source after it has been attached to the document.

Since labels typically include an address, all you have to do is insert the address block as a merge field in the first cell.

5. Click the **Address Block** button in the Write & Insert Fields group.

The Insert Address Block dialog box appears.

6. Choose how you want the name to appear and click **OK**.

The merge field is inserted.

The next step is specific to creating a mail merge for labels. It copies the Address Block merge field in each label cell of the table.

7. Click the **Update Labels** button in the Write & Insert Fields group.

The Address Block merge field is inserted in each cell of the table.

Now you're ready to preview the labels.

8. Click the **Preview Results** button in the Preview Results group.

If the preview looks good, you're ready to finish the mail merge.

9. Click the **Finish & Merge** button and select how you want to finish the mail merge.

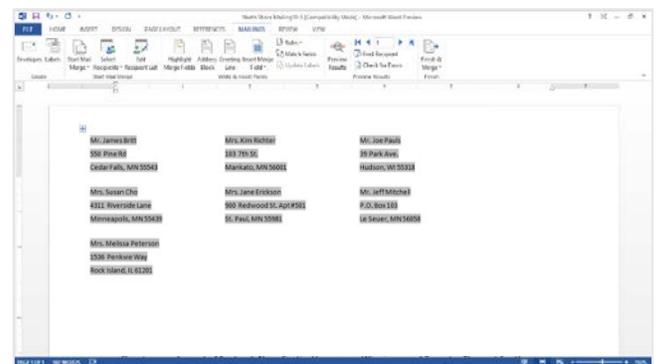


Figure 10-20: The merged label document.

Creating Envelopes

If you suffer from terrible handwriting, you can have Word address your envelopes for you. Word is great for printing envelopes if your printer can handle envelopes. That's a big if—many printers don't handle envelopes very well, and many others don't handle envelopes at all. The only way to really find out if you can print envelopes with your printer is by consulting the manual that came with your printer.

Tip:

✓ If you've misplaced your printer manual, you can try printing several envelopes with the printer to see how they come out—just be prepared to go through several envelopes before you find out how to feed the envelope into the printer!

1. Click the **MAILINGS** tab on the Ribbon and click the **Envelopes** button in the Create group.

The Envelopes tab of the Envelopes and Labels dialog box appears.

2. Click the **Delivery address** text box and type the delivery address.

This is where you want the envelope to be delivered.

Other Ways to Enter the Delivery Address:

Click the **Insert Address** button (). Select the profile you want to use (Outlook) and select a contact from Outlook Contacts.

3. Click the **Return address** text box and type the return address.

This should be the return address.

4. Click **Print** to print the envelope, or click **Add to Document** to add the envelope to the beginning of the document.

If you add the envelope to the document, make sure the envelope and paper are in the correct order before printing the document.

Change envelope options

If you want to use a different envelope size or change the font used, you can change the envelope options.

1. Click the **Options** button in the Envelopes tab of the Envelopes and Labels dialog box.

Two tabs can help you specify how the envelope will be printed:

Exercise

- **Exercise File:** None required.
- **Exercise:** Create an envelope with your address as the Return address and a friend's address as the Delivery address. Change the font used for the delivery address.

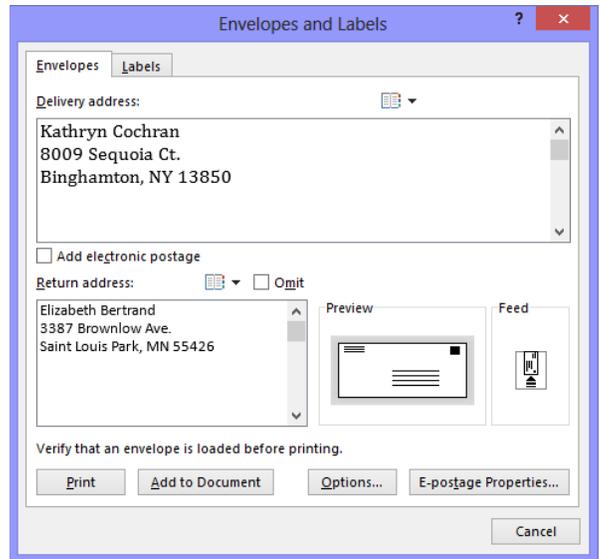


Figure 10-21: The Envelopes tab of the Envelopes and Labels dialog box.

Select the size of the envelope here (Size 10 is the most common).

Change the font used on the delivery address and return address.

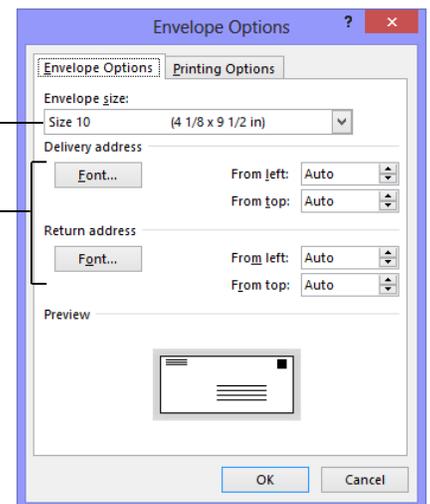


Figure 10-22: The Envelope Options dialog box.

- **Envelope Options:** Verify the envelope size, the font used in the return and delivery addresses, and adjust the location of the addresses on the envelope.
 - **Printing Options:** If necessary, you can change how the envelope is fed to the printer. These settings are automatically selected, however, so it is best not to adjust them.
2. Enter the envelope settings you want to use and click **OK**.

The Envelope Options dialog box closes, but the Envelopes and Labels dialog box is still open.

3. Click **OK**.

The Envelopes and Labels dialog box closes and the changes are applied to the envelope.

Working with Mailings Review

Quiz Questions

- 1.
2. A mail merge is the process of combining a Word document with data. (True or False?)
3. Which of the following is NOT a type of mail merge document?
 - A. Letters
 - B. Labels
 - C. Envelopes
 - D. Spreadsheets
4. The rows in a data source contain information unique to the recipients in the mail merge. (True or False?)
5. Which of the following can you use as the data source for a mail merge?
 - A. An Excel spreadsheet
 - B. An Access database
 - C. A table in a Word document
 - D. All of the above.
6. You see a strange word, <<FirstName>> in a document. What is this?
 - A. It's a merge field - the information from the FirstName field will be inserted here.
 - B. It's a form field - enter your first name here.
 - C. It's a reminder that you need to sign the letter before you send it.
 - D. It's a really bad typing error.
7. How can you add an address to a mail merge document?
 - A. Click the Address Wizard button in the Insert tab on the Ribbon.
 - B. Click the Address Wizard button in the Mailings tab on the Ribbon.
 - C. Click the Address Block button in the Write & Insert Fields group of the Mailings tab on the Ribbon.
 - D. Click the Address Block button in the Write & Insert Fields group of the Insert tab on the Ribbon.
8. Which of these would a rules field allow you to do?
 - A. Add special text to records that met certain criteria.
 - B. Add special text to each record in the mail merge.
 - C. Count the number of data records that were successfully merged.
 - D. All of these.
9. The only way you can see the results of a mail merge is to complete the mail merge and send the results to the printer. (True or False?)
10. Which of the following is NOT a destination where you can send the results of a mail merge?
 - A. An e-mail message.

- B. An Excel spreadsheet.
 - C. A new document.
 - D. A printer.
11. Which of the following CANNOT you do from the Mail Merge Recipients dialog box?
- A. Add or remove recipients from the data source.
 - B. Update a recipient's address.
 - C. All of these.
 - D. Sort the list alphabetically by last name.
12. To sort a list of records or recipients, simply click the column heading you want to use to sort the list. (True or False?)
13. You can specify the type of label you are using by selecting its product number, such as Avery 5160, when creating mailing labels. (True or False?)
14. You can enter an Outlook Contact's address in the Delivery address text box by clicking the Insert Address button. (True or False?)

Quiz Answers

- 1.
2. True. The mail merge process combines a Word document with data.
3. D. There isn't a spreadsheet mail merge document type.
4. True. Each row in a data source contains information that is unique to each recipient in a mail merge.
5. D. You can use an Excel spreadsheet, Access database, or Word document table as data sources in a mail merge.
6. A. Chevrons << >> indicate a merge field, where information is inserted during a mail merge.
7. C. Click the Address Block button in the Write & Insert Fields group of the Mailings tab on the Ribbon to insert an address in a mail merge document.
8. D. Rules fields allow you to customize your mail merge all of these ways, and more.
9. False. You can preview the results of a mail merge to see what the data will look like once it has been inserted into a document.
10. B. You can't send the results of a mail merge to an Excel spreadsheet.
11. C. You can add or remove recipients from the data source, update a recipient's address, and sort the data source alphabetically by last name from the Mail Merge Recipients dialog box.
12. True. Sort a list of records or recipients by clicking the column heading you want to use to sort the list.
13. True. You can specify the type of label you are using by selecting its product number.
14. True. This is a very easy way to enter a delivery address.

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Like it or not, it's likely that someday you will have to create a document with a team of individuals. For example, you might write a draft of a letter, have your manager review it, make changes to it, and get it back. Then you go back to the document, make the changes, and then send the document to its final destination.

The folks at Microsoft realized that people often need to work together when creating documents, so they included a whole slew of features that enable several people to work together to create and update a document. Word includes tools such as track changes and comparing documents that allow you to examine suggested changes and choose whether or not to include them in the final draft.

Using Exercise Files

This chapter suggests exercises to practice the topic of each lesson. There are two ways you may follow along with the exercise files:

- Open the exercise file for a lesson, perform the lesson exercise, and close the exercise file.
- Open the exercise file for a lesson, perform the lesson exercise, and keep the file open to perform the remaining lesson exercises for the chapter.

The exercises are written so that you may “build upon them”, meaning the exercises in a chapter can be performed in succession from the first lesson to the last.

Tracking Revisions

Revising a document with tracked changes in Word works just like revising a document with a printed copy and a red pen; you can easily see the original text and any additions, deletions, or changes made to the document are highlighted.

Turn on tracking so the author can see the changes you recommend. In the end, they can choose which changes to include in the final document.

1. Click the **REVIEW** tab on the Ribbon and click the **Track Changes** button in the Tracking group.

The button is highlighted, indicating that tracking is turned on.

Other Ways to Track Changes:

Press <Ctrl> + <Shift> + <E>. Or, right-click the status bar and select **Track Changes** from the list. Click the **Track Changes** button in the status bar to turn the feature on or off.

2. Edit the document as necessary.

The changes are highlighted as they are entered in the document.

Tip:

- ✓ To change the color used to mark changes, open the **Dialog Box launcher** in the Tracking group and click **Advanced Options**.

Exercise

- **Exercise File:** Seniors11-1.docx
- **Exercise:** Turn on tracking changes to make revisions: Type “Thank you for your interest in North Shore Travel!” at the beginning of the first body paragraph. Replace “yourselves” in the last sentence of the second body paragraph with “Pleasant Hills”. Replace “great” in the last sentence of the second body paragraph with “wonderful”. Show the tracked revisions in balloons. Return to showing the revisions inline. Turn off tracking changes.

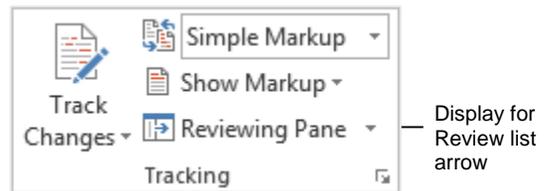
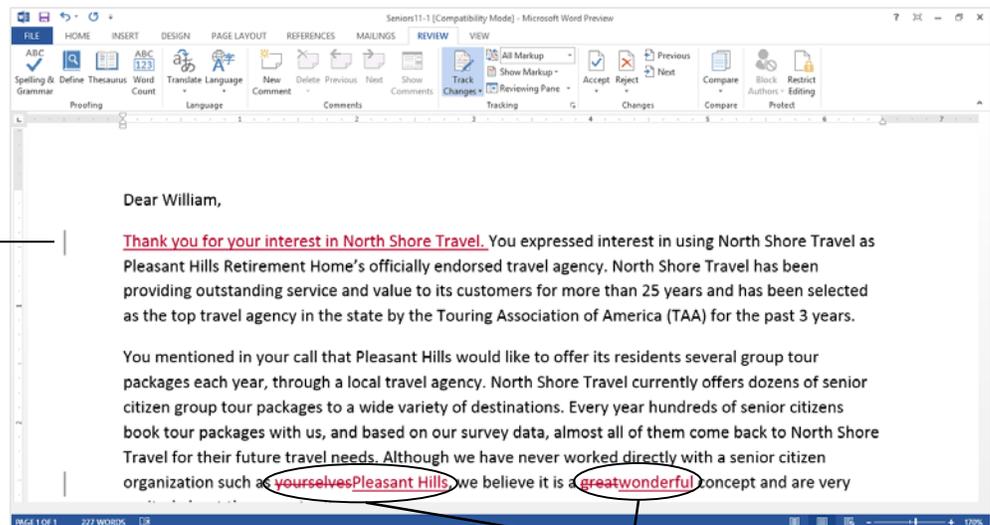


Figure 11-1: The Tracking group.

These bars indicate that a revision has been made in the paragraph.



Deleted and replaced text.

Figure 11-2: Tracked and Highlighted changes shown inline in a document.

Change how tracked changes are displayed

By default, tracked changes are shown in line with the other text in the document. You can change the revisions so that they are shown in balloons, and you can also change the color of the revisions. The changes are called “markup”.

- **Show changes in balloons:** Click the **Show Markup** button in the Tracking group on the Ribbon and select **Balloons**. Then, select **Show Revisions in Balloons** from the list.
- **Display or hide markup:** Click the **Display for Review** list arrow and select an option from the list.
- **Display or hide specific markup items:** Click the **Show Markup** button in the Tracking group to display or hide specific markup items.

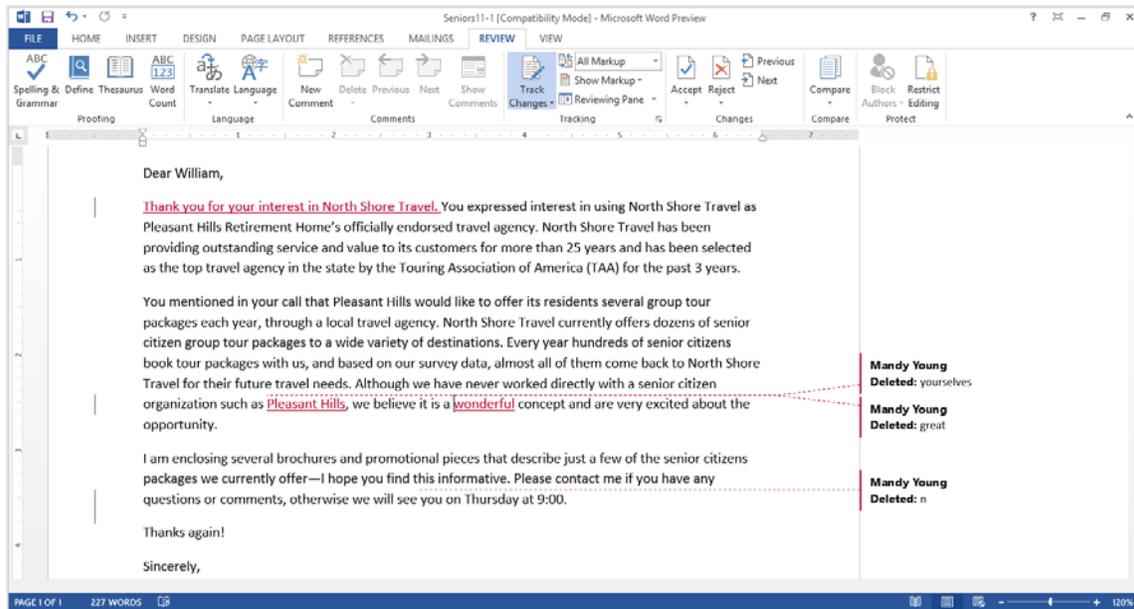


Figure 11-3: Tracked and Highlighted changes shown in balloons in a document.

Accepting and Rejecting Revisions

Revising documents using Word’s revision features can save a lot of time, because the changes are already entered in your document. If you accept the changes, Word automatically incorporates the changes into your document. If you reject the changes, Word uses your original text.

Use the Ribbon

1. Click the **REVIEW** tab on the Ribbon and click the **Next** button in the Changes group.

Word highlights the first revision in the document. Decide if you want to accept the revision, or reject it.

2. Click **Accept**, or click **Reject** in the Changes group.

The revision is accepted and incorporated into the document, or rejected and removed from the document. By default, the next revision is highlighted, so you can accept or reject it.

Other Ways to Accept or Reject Changes: Click the **Accept** button list arrow or the **Reject** button list arrow to select a different option, as shown in the table below. Or, right-click the revision and select the desired action from the contextual menu.

3. Repeat until all proposed revisions are accepted or rejected.

The proposed changes are either included or removed from the document.

Table 11-1: Accept or Reject Options

Accept or Reject and Move to Next	The proposed change is acted on and the next change is highlighted.
Accept or Reject Change	The highlighted change is accepted or rejected.
Accept or Reject All Changes Shown	Accepts or rejects all changes that are currently visible in the window.
Accept or Reject All Changes in Document	Accepts or rejects every single change in the document.

Use the Reviewing Pane

The Reviewing Pane is a great way to review all the tracked changes in a document. It displays all of the

Exercise

- **Exercise File:** Seniors11-2.docx
- **Exercise:** Open the Reviewing Pane and accept the first tracked change.
Close the Reviewing Pane.
Accept the “Pleasant Hills” revision.
Reject the “wonderful” revision.

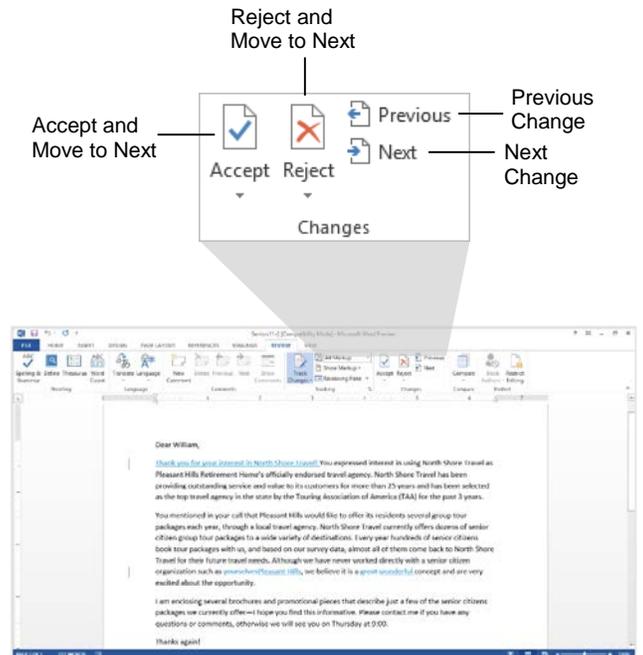


Figure 11-4: Use the buttons in the Changes group to accept and reject changes.

Using Collaborative Editing Tools

proposed changes in your document, the total number of changes, and the number of changes of each type.

1. Click the **REVIEW** tab on the Ribbon and click the **Reviewing Pane** button in the Tracking group.

The Reviewing Pane appears. A summary of the revisions appears near the top of the pane, while the actual revisions are grouped by section in the document.

✔ **Tip:** You can view the Reviewing Pane vertically or horizontally in the window by clicking the **Reviewing Pane** list arrow and selecting an option from the list.

2. Click a revision in the Reviewing Pane to select it in the document.

You can now choose whether or not you want to accept or reject the revision in the document.

3. Click the **Accept** or **Reject** button in the Changes group on the REVIEW tab of the Ribbon.

👉 **Other Ways to Accept or Reject a Change:**
Right-click the revision and select the desired action.

The revisions disappear from the Reviewing Pane as they are accepted or rejected in the document.

4. Click the **Close** button in the Reviewing Pane.

The Reviewing Pane is closed.

✔ **Tip:**

- ✓ When editing of a document is finished, you can mark the document as final so that other people don't make changes, and the document is read-only. Click the **FILE** tab and click the **Protect Document** button on the Info tab. Select **Mark as Final** from the list.

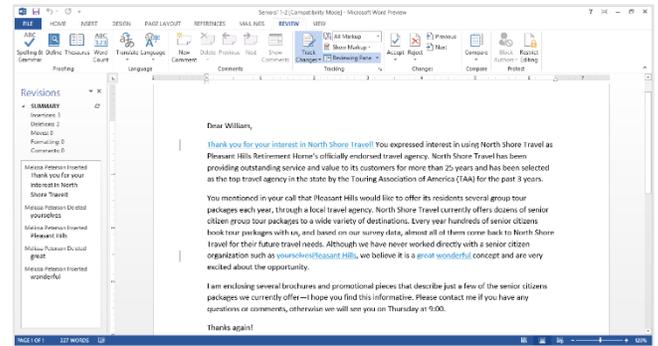


Figure 11-5: The Reviewing Pane placed vertically in the window.

Using Comments

Adding a comment to a document is like a sticking a Post-It note to it. You can use Word's comments feature to add suggestions, notes, or reminders to your documents. You can add a comment virtually anywhere in a document. Comments appear on the document in bold-colored balloons that are almost impossible to miss and are easy to read.

Insert a comment

1. Place the insertion point, or select the text, where you want to insert the comment.

If you select text, the text will be highlighted the same color as the comment balloon.

2. Click the **REVIEW** tab on the Ribbon and click the **New Comment** button in the Comments group.

The comment balloon is inserted.

3. Enter the comment text in the balloon.

The comment is inserted in the document.

Edit a comment

You can easily make changes to a comment simply by typing in any comment balloon.

- Click in the comment balloon and edit the text as needed.

Delete a comment

Delete a comment when it is no longer needed.

1. Select the comment balloon.
Select the balloon by clicking the text in the balloon.
2. Click the **REVIEW** tab on the Ribbon and click the **Delete Comment** button in the Comments group.

- **Other Ways to Delete a Comment:**
Right-click the comment balloon and select **Delete Comment** from the contextual menu.

Review comments

You can easily review comments by jumping between each comment in a document.

Exercise

- **Exercise File:** Seniors11-3.docx
- **Exercise:** Select the text "I am enclosing" at the beginning of the third body paragraph. Insert a comment that says, "Can we add our web address here?"
Hide comments in the document.
Show comments again, and edit the comment to add the text, "its www.northshoretravel.com."
Delete the comment.

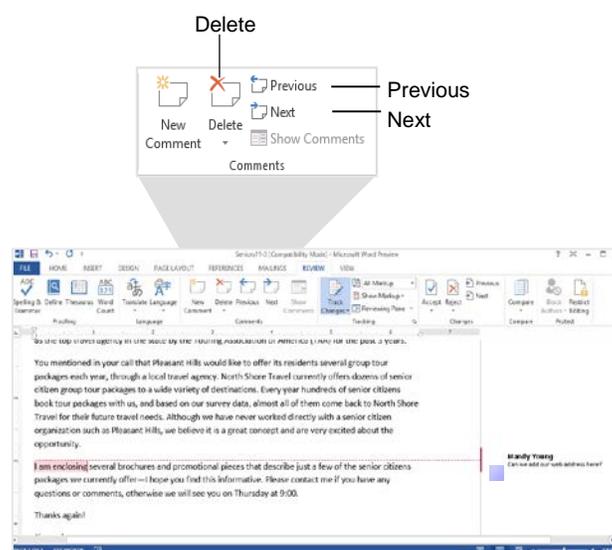


Figure 11-6: Comments appear in the margins of the document.

1. Click the **REVIEW** tab on the Ribbon.
2. Use the **Next Comment** and **Previous Comment** buttons in the Comments group to navigate through the comments in the document.

The comments in the document are shown as you click the Next and Previous buttons.

Hide or display comments in a document

If comments are distracting, you can easily hide them. This does not remove them, it only hides them from view temporarily.

1. Click the **REVIEW** tab on the Ribbon and click the **Show Markup** button in the Tracking group.

A list of items that are displayed in the document appear. If the item has an orange checkmark next to it, it is being displayed in the document.

2. Select **Comments** from the list.

The comments are now hidden in the document. Repeat to display comments once again.

Print comments

The last thing we'll discuss with comments is how to print them. Since they don't print automatically, you must change your print settings to include them.

1. Click the **FILE** tab on the Ribbon and select **Print**.

The Print tab appears.

2. Click the **Print All Pages** list arrow and select **Print Markup** from the list.

This ensures that comments and any tracked changes that still appear in the document will be printed along with the rest of the document.

3. Click **OK**.

The document prints with the comments.

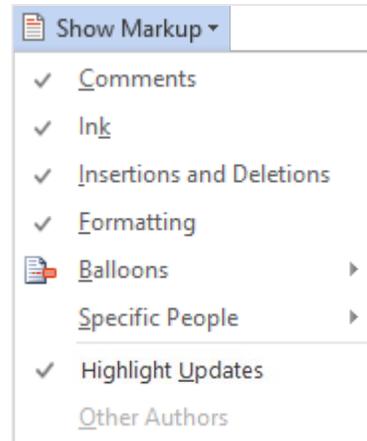
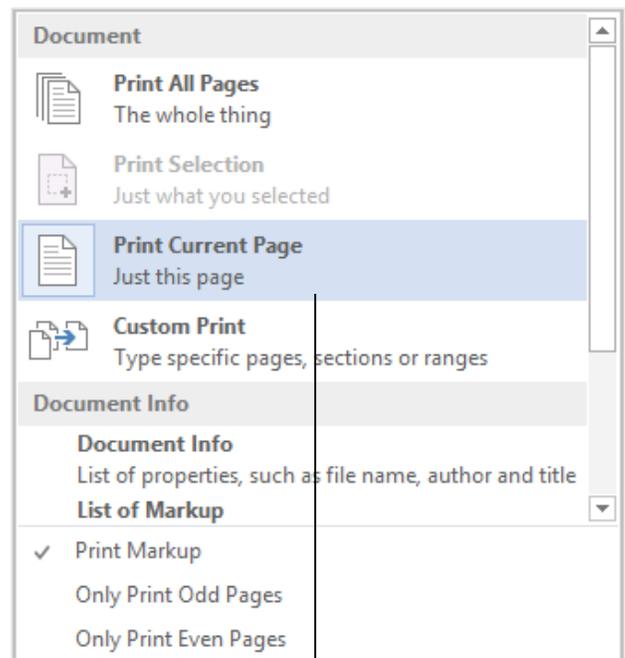


Figure 11-7: Uncheck Comments in the Show Markup menu to hide comments in the document.



Select what you want to be printed in the document from the Print what list arrow.

Figure 11-8: Select what you want to print from the first list arrow on the Print tab.

Comparing and Combining Documents

Comparing and combining documents lets you see the difference between documents. For example, if you and a co-worker have made changes to the same document in separate files, you can combine them together so that all the changes are incorporated into a single document, saving time and increasing accuracy.

1. Click the **REVIEW** tab on the Ribbon. Click the **Compare** button in the Compare group.

A list of options you can use to merge the documents appears:

- **Compare:** Use this to see the differences between two documents without changing the documents being compared. The legal blackline comparison is displayed by default in a new third document.
- **Combine:** Use this to combine revisions from several documents into one document. For example, if Steve, Kitty, and Melissa are making revisions for Jon's document, they can combine their revisions into one document. This makes it easier for Jon to incorporate their revisions.

2. Select **Compare** or **Combine**.

The Compare Documents or Combine Documents dialog box appears.

3. Click the **Original document** list arrow and select the document you want to use as the original.

The revised document will be compared to this document.

- **Other Ways to Select the Original Document:** Select **Browse** from the list or click the **Browse for Original** button to the right of the list arrow and navigate to the file.

4. Click the **Revised document** list arrow and select the document that contains the changes you want to merge into the original document.

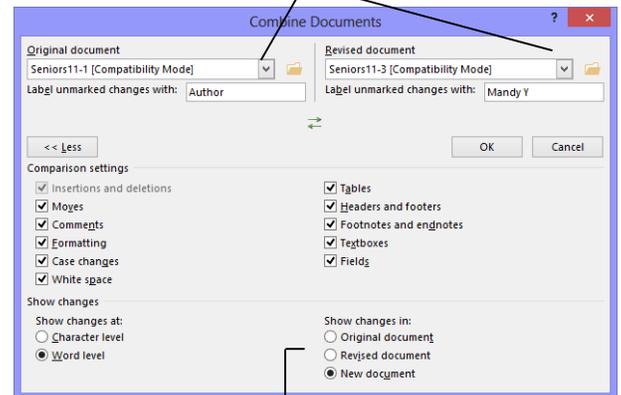
Any text in this document that is different from that in the original document is shown as a tracked change.

- **Other Ways to Select the Revised Document:** Select **Browse** from the list or click the **Browse for Revised** button to the right of the list arrow and navigate to the file.

Exercise

- **Exercise File:** Seniors11-3.docx and Seniors11-1.docx
- **Exercise:** Combine Seniors11-3.docx and Seniors11-1.docx in a new document.

Click the **Browse for** buttons to choose which documents to merge.



Use the Show changes in options to determine how the documents should be compared or combined.

Figure 11-9: The Combine Documents dialog box.

Using Collaborative Editing Tools

5. (Optional) Click **More**.

The settings you can use to change how the changes appear in the document are displayed.

- **Comparison settings:** Lets you choose which items you want to appear when the documents are merged.
- **Show changes:** Lets you select the options for what you want the changes to appear. See the table on the right for more information about these settings.

6. (Optional) Select the settings you want to use.

7. Click **OK**.

The results of the compare or combine are displayed in a new Word document.

✓ **Tips:**

- ✓ Don't try to compare and merge documents that don't have similar content. The results will be very difficult to work with.
- ✓ To ensure that both the original and revised documents display in the document window, click the **Compare** button and select **Show Source Documents** from the list. Select **Show Both** if you would like to display both the original and the revised documents.

Table 11-2: Show Changes Settings

Character level	Character differences between the documents are shown as single characters rather than the whole word.
Word level	This option is selected by default, and it is easier to detect changes. It means that if a character in a word changes, the whole word is highlighted, not just a single character.
Original document	This option merges the results in the selected document. In this example, the Lesson 9A document would open and display all the differences between the documents.
Revised document	This option merges the results in the open document. In this example, the Seniors document would display all the differences between the documents.
New document	This option merges the results in a brand new document. This is a good option because the original documents are not changed.

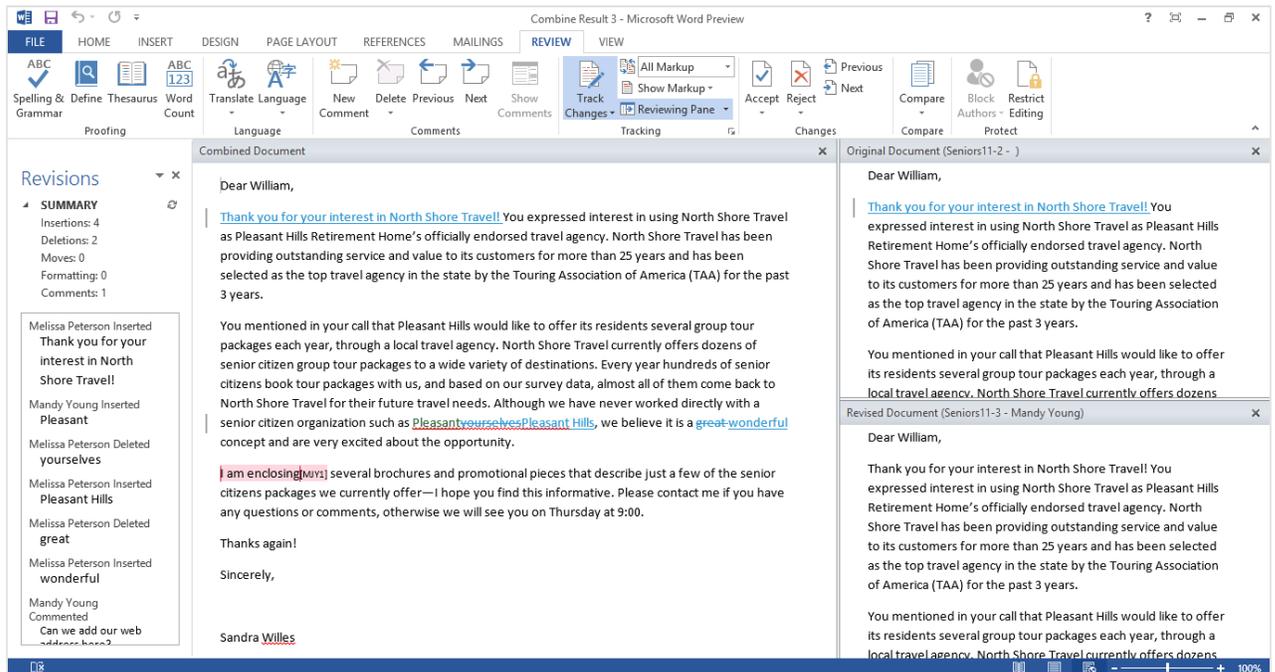


Figure 11-10: The results of combining the two documents.

Password Protecting a Document

If you have a document you don't want anyone else to see or modify, you can password-protect, or *encrypt*, the document. This restricts access to only yourself or people who know the password. You can require users to enter a password to open a document and/or modify a document.

Add a password to open a document

You can add a password to a document so that only specific people can open it.

1. Click the **FILE** tab on the Ribbon.
The Info tab of Backstage view appears.
2. Click the **Protect Document** button and select **Encrypt with Password** from the list.
The Encrypt Document dialog box appears.
3. Click the **Password** text box and type a password.
You can type up to 255 characters for the password.

✔ **Tip:** Use strong passwords that combine uppercase and lowercase letters, numbers, and symbols. Passwords should be 8 or more characters in length. A pass phrase that uses 14 or more characters is better.

4. Click **OK**.
The Confirm Password dialog box appears.
✔ **Tip:** It is critical that you remember your password. If you forget your password, Microsoft cannot retrieve it.
5. Retype your password and click **OK**.
The Info tab changes to indicate that a password is required to open the document.

Add a password to modify a document

With this type of protection, anyone can open the document, but a password is required to modify it.

1. Click the **FILE** tab on the Ribbon and click **Save as**.
The Save As dialog box appears.

Exercise

- **Exercise File:** Seniors11-5.docx
 - **Exercise:** Add a password to open the document “pass2468” and add another password to modify the document “modify246”.
- Close the document.
- Use the passwords to open the document and change the opening text to “Dear Wendy,”



Figure 11-11: The Encrypt Document dialog box.

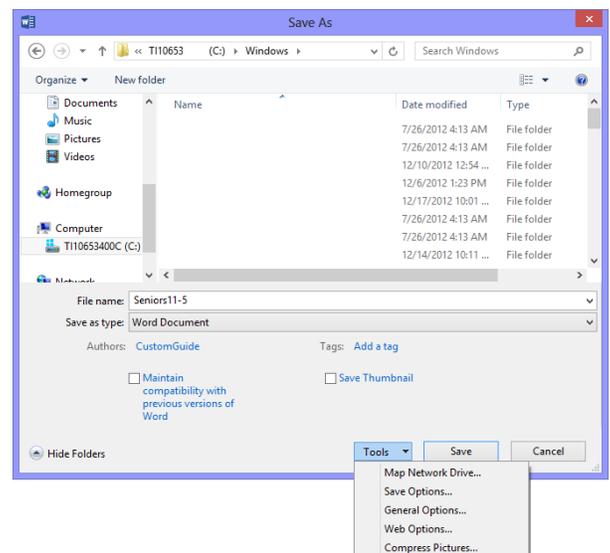


Figure 11-12: Open General Options from the Tools list in the Save As dialog box.

2. Click the **Tools** button at the bottom of the Save As dialog box and select **General Options** from the list.

The General Options dialog box appears. Note that there are two password text boxes here: one to open the document and one to modify the document.

3. Click the **Password to modify** text box and enter the password.
4. Click **OK**.
5. Reenter your password and click **OK**.

The password is confirmed.

✔ **Tips:**

- ✔ If you require users to enter a password to both open and modify a presentation, make sure each password is different from the other.
- ✔ To remove a password, open the General Options dialog box and remove the password from the “Password to open” or “Password to modify” text box in which it was entered.

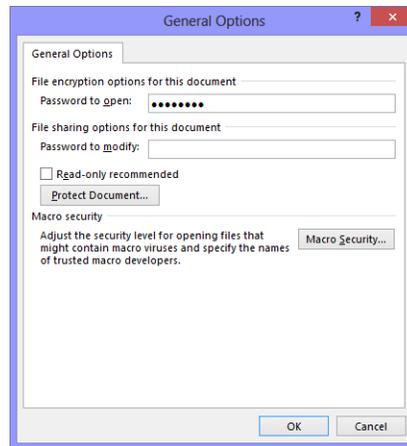


Figure 11-13: Add passwords in the General Options dialog box.

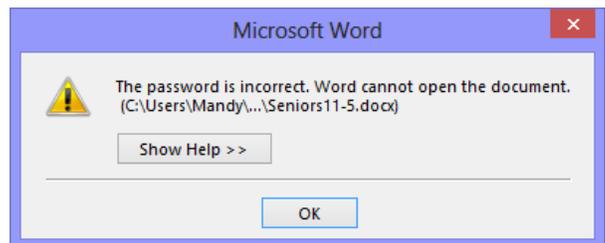


Figure 11-14: When an incorrect password is entered, the Microsoft Office Word dialog box appears.

Protecting a Document

You can protect a document’s formatting, protect specific portions of a document, and even grant permissions for different users to modify specific parts of a document. Sound confusing? Don’t worry—once you finish this lesson, everything will make a lot more sense.

Protect a document’s formatting

Activating this protection will restrict the formatting in the document to specific styles. It will also prevent users from applying formatting directly to the document. For example, another user couldn’t apply bold formatting to a heading.

1. Click the **FILE** tab on the Ribbon.

Select the **Info** tab.

2. Click the **Protect Document** button and select **Restrict Editing** from the list.

The Restrict Formatting and Editing task pane appears along the right side of the window.

Other Ways to Open the Restrict Formatting and Editing Task Pane:

Click the **REVIEW** tab on the Ribbon and click the **Restrict Editing** button in the Protect group.

3. Click the **Limit formatting to a selection of styles** check box.

4. Click the **Settings** link to select the styles you want to use in the document.

The Formatting Restrictions dialog box appears.

To restrict the formatting in the document to the use of specific styles, select the check boxes of the styles you want to use.

Protect a document’s content

Controlling the content of the document is another valuable restriction. You can even apply exceptions to the document protection. For example, the entire document is “Read only” protected except certain areas that you designate.

1. Click the **FILE** tab on the Ribbon.

Select the **Info** tab.

Exercise

- **Exercise File:** Seniors11-6.docx
- **Exercise:** Protect document formatting so that the recommended minimum number of styles can be used. Protect the document contents so comments are the only type of editing you can do in the document.

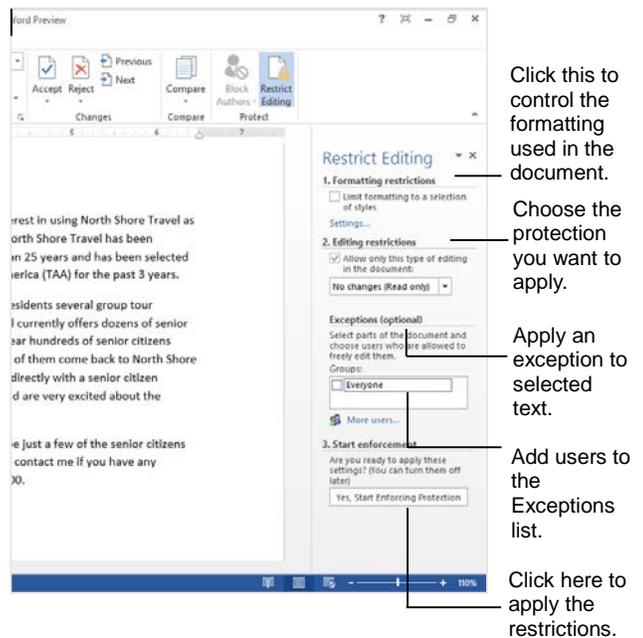


Figure 11-15: The Restrict Formatting and Editing task pane displays options for protecting the document.

- Click the **Protect Document** button and select **Restrict Editing** from the list.

The Restrict Formatting and Editing pane appears in the Word window.

Other Ways to Open the Restrict Formatting and Editing Task Pane:

Click the **REVIEW** tab on the Ribbon and click the **Restrict Editing** button in the Protect group.

- Click the **Allow only this type of editing in the document** check box.

Notice that the list arrow below the check box is now activated, and the Exceptions area of the Protect Document task pane appears.

First, choose the type of protection you want to use.

Table 11-3: Editing Restriction Options explains your options.

- Click the list arrow and select a type of protection.

Add an exception

After a document has been protected, you can add exceptions to the protection.

- Select the text you want to exempt from protection in the document.

There are two ways to add exceptions to the protected document:

- Click the **Everyone** check box to grant the exception to everyone who views the document.
- Click the **More users** link and type the user names or e-mail addresses separated by semicolons and click **OK**.

Tip: If you select more than one individual, the individuals are added as an item to the Group box, so you can easily select them again without having to select them individually.

- Add the exceptions as necessary.
- Click the **Yes, Start Enforcing Protection** button to begin protection.
- (Optional) Enter a password so that users who know the password can remove the protection.
- Click **OK**.

Tip: Exceptions can only be applied to Comments and No changes (Read only) editing restriction protection.

Table 11-3: Editing Restriction Options

No changes (Read only)	No editing or modifying is allowed. You can add exceptions to this type of restriction.
Tracked changes	Any change or modification made by the user is tracked and highlighted. You cannot use exceptions with this type of protection.
Comments	Users cannot change or modify the document text, but they can insert comments. You can add exceptions to this type of restriction.
Filling in forms	This option is only applicable in documents where forms are used.

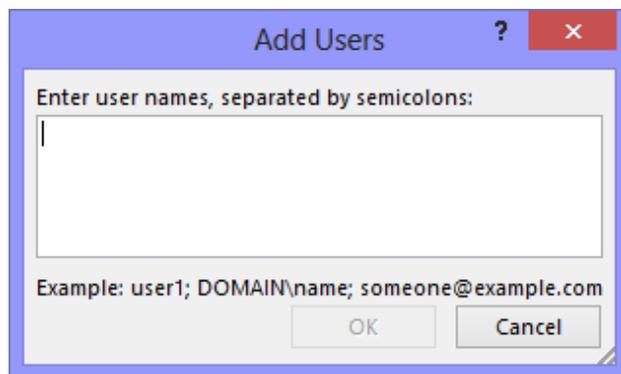


Figure 11-16: Click the More users link and add users in the Add Users dialog box.

Using Collaborative Editing Tools

Review

Quiz Questions

15. How can you track changes in a Word document?
 - A. Press <F1>.
 - B. Click the Track Changes button in the Revisions group of the Edit tab on the Ribbon.
 - C. Click the Track Changes button in the Tracking group of the Review tab on the Ribbon.
 - D. You have to buy Microsoft's Track Changes Add-In for Microsoft Word.
16. Revisions only allow you to view changes that were made to a document — you can't accept or reject the revisions. (True or False?)
17. By default, revisions are shown inline with text. (True or False?)
18. You can use the Reviewing Pane to accept or reject all the changes in a document. (True or False?)
19. Which of the following is NOT a good example of when to insert a comment?
 - A. To add a suggestion to a document that you are reviewing.
 - B. To remind yourself to add a works cited page — or to quit plagiarizing so much!
 - C. To make a change or revision to a document that you can later accept or reject.
 - D. To leave a note for a co-worker who is reviewing the document.
20. Your boss sends you edits to a report you made for work. What is the fastest, easiest way to compare differences between the original document and the modified document?
 - A. Click the Compare button and select Compare from the Review tab in the Compare group on the Ribbon.
 - B. Send the documents to an online editing service.
 - C. Click the Combine button and select Combine from the Review tab in the Combine group on the Ribbon.
 - D. There is no quick way, you must go through both documents by yourself, word by word.
21. You can password protect a document from being opened and/or modified. (True or False?)
22. The Restrict Formatting and Editing task pane can NOT do which of the following?
 - A. Apply exceptions to the protection in specific areas of the document.
 - B. Protect your document from viruses.
 - C. Protect the formatting in a document.
 - D. Protect document content.

Quiz Answers

1.

2. C. Click the Track Changes button in the Tracking group of the Review tab on the Ribbon to track changes in a document.
3. False. You can accept or reject any revisions made to a document.
4. True. By default, revisions are shown inline with text, but they can be shown in balloons instead.
5. True. The Reviewing Pane displays all the tracked changes in a document. You may reject or accept all of these changes in the Reviewing Pane.
6. C. Use Word's Track Changes feature to make changes that you can accept or reject.
7. A. Click the Compare button and select Compare from the Review tab in the Compare group on the Ribbon to see the differences between two similar documents.
8. True. You can password protect a document from being opened and/or modified.
9. B. You cannot protect a document from viruses in the Restrict Formatting and Editing task pane.

Working with Outlines, Long Documents, and References

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If you're considering writing a long report, thesis paper, or book, then this is the chapter for you. In this chapter we'll take a look at how Word can help you work with outlines and long documents. If you still remember your English classes from days gone by, you may remember that creating an outline is the first step when making a report, which is where this chapter starts.

Once you have created a long document, you will learn how to add cross-references, bookmarks, footnotes, a table of contents, an index, a bibliography and other reference tools you may not have known you could do with a word processor.

Using Exercise Files

This chapter suggests exercises to practice the topic of each lesson. There are two ways you may follow along with the exercise files:

- Open the exercise file for a lesson, perform the lesson exercise, and close the exercise file.
- Open the exercise file for a lesson, perform the lesson exercise, and keep the file open to perform the remaining lesson exercises for the chapter.

The exercises are written so that you may “build upon them”, meaning the exercises in a chapter can be performed in succession from the first lesson to the last.

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Creating a Document in Outline View

Outline view lets you create and work with long documents in outline format.

View a document in Outline view

Outline view makes it much easier to create, view, and organize an outline.

- Click the **VIEW** tab on the Ribbon and click the **Outline** button in the Views group.

The OUTLINING tab appears on the Ribbon.

By default, Level 1 is the selected style, which is the highest level in an outline. The Level 2 style is the next level, all the way down to Level 9.

Add a new heading

Adding a new heading to an outline is easy.

- Place your cursor where you want to insert the document heading and type the heading.
 - **Other Ways to Add a New Heading:** Right-click the heading where you want to insert the new heading in the Navigation Pane and select one of the following options: **New Heading Before**, **New Heading After**, or **New Subheading**.

Exercise

- **Exercise File:** None.
- **Exercise:** Open a new blank document in Word. Open the document in Outline View.
Type “Executive Summary” and press <Enter>.
Type “Assessment” and press <Enter>.
Type “Current Environment” and press <Enter>.
Type “Business Needs” and press <Enter>.
Type “System Strategies” and press <Enter>.
Type “Long Range Plan” and press <Enter>.

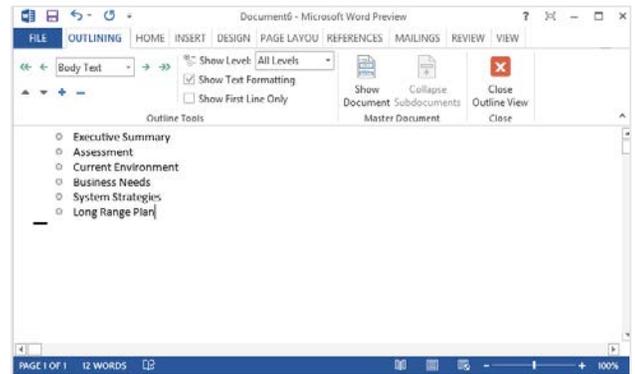


Figure 12-1: A document in Outline view.

Rearranging an Outline or Long Document

You usually want to read through a document once you have finished writing it to make sure it is organized and logical. Outline view provides you with a good overview of your document, and it allows you to rearrange a document without a lot of scrolling.

Demote a heading

In Outline view, it's easy to change heading styles. For example, you could demote a Level 1 to Level 2.

1. Place the insertion point in the heading.
2. In Outline view, click the **OUTLINING** tab on the Ribbon and click the **Demote** button in the Outline Tools group.

The heading's formatting changes down a level in the outline. When a heading is demoted, its subordinate headings are not demoted with it.

Other Ways to Demote a Heading:

Place the insertion point at the end of the line and press **<Tab>**.

Press **<Alt> + <Shift> + <=>**.

Click the **Outline Level** list arrow in the Outline Tools group and select a level.

Or, right-click a document heading in the Navigation Pane and select **Demote** from the contextual menu.

Demote to body text

Body text does not show up as a heading in the outline.

1. Place the insertion point in the heading.
2. In Outline view, click the **OUTLINING** tab on the Ribbon and click the **Demote to Body Text** button in the Outline Tools group.

When body text is inserted under a heading, a plus sign appears next to the heading indicating that there is text beneath it.

Other Ways to Demote to Body Text:

Click the **Outline Level** list arrow in the Outline Tools group and select **Body Text** from the list.

Exercise

- **Exercise File:** Proposal 12-2.docx.
- **Exercise:** Demote Current Environment to Level 2 text. Add two subheadings under "System Strategies": "Hardware" and "Software". Enter this body text under the "Software" subheading: "The proposed operating system of North Shore Travel is Windows 7" and demote it to body text.

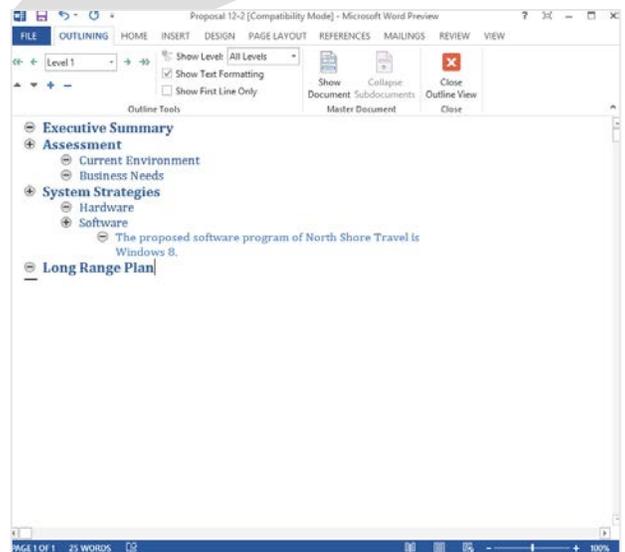
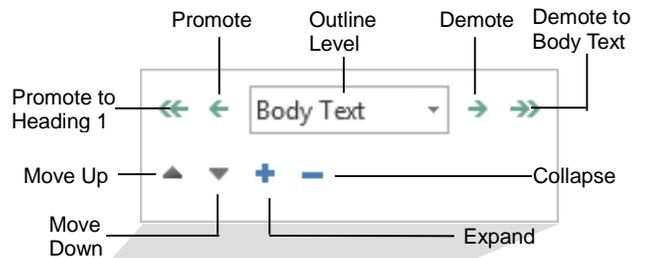


Figure 12-2: Use the controls in the Outline Tools group to rearrange headings in Outline view.

Promote a heading

1. Place the insertion point in the heading.
2. In Outline view, click the **OUTLINING** tab on the Ribbon and click the **Promote** button in the Outline Tools group.

The heading is promoted to the next highest level.

Other Ways to Promote a Heading:

Place the insertion point at the end of the line and press **<Shift> + <Tab>**.

Press **<Alt> + <Shift> + <←>**.

Click the **Outline Level** list arrow in the Outline Tools group and select a level.

Or, right-click a heading in the Navigation Pane and select **Promote** from the contextual menu.

Promote to Heading 1

Here's how to promote a heading to the highest level in the outline, Heading 1.

1. Place the insertion point in the heading.
2. In Outline view, click the **OUTLINING** tab on the Ribbon and click the **Promote to Heading 1** button in the Outline Tools group.

Other Ways to Promote to Heading 1:

Click the **Outline Level** list arrow in the Outline Tools group and select **Level 1** from the list.

The heading level is changed.

Rearrange an outline

You can move a document's headings and subheadings around to rearrange the document.

1. Place the insertion point in the heading.
2. In Outline view, click the **OUTLINING** tab on the Ribbon and click either the **Move Up** button or **Move Down** button in the Outline Tools group.

Other Ways to Rearrange Headings:

Click and drag the heading outline symbol to a new location in the outline.

The heading and all of its subordinate headings and text are moved.

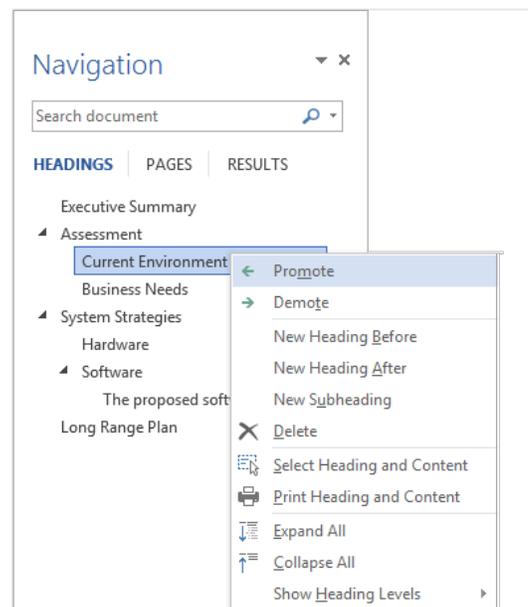


Figure 12-3: Use the Navigation Pane to rearrange your long documents.

Numbering an Outline

If you decide that you want the heading levels in your document to be numbered, this lesson explains how to do it.

1. Select the headings and text you want to number.
Apply a multilevel numbering scheme that numbers headings accordingly.

2. Click the **HOME** tab on the Ribbon and click the **Multilevel List** button in the Paragraph group.

Table 12-1: Multilevel List Numbering Options below, shows the many options for outline numbering.

To number an outline that already is organized by heading levels, select an option that has Heading highlighted in gray after the numbering scheme.

For example, Heading 1 will be numbered the highest level of the multilevel numbering scheme, Heading 2 will be numbered the next highest level in the multilevel numbering scheme, and so on.

3. Select the numbering scheme you want to use from the list.
The outline numbering is applied to the headings in the document.

Exercise

- **Exercise File:** Proposal 12-3.docx
- **Exercise:** Open the document in Print Layout view. Select all the text in the document and apply this multilevel list style to the outline:
Remove the style when you are done.

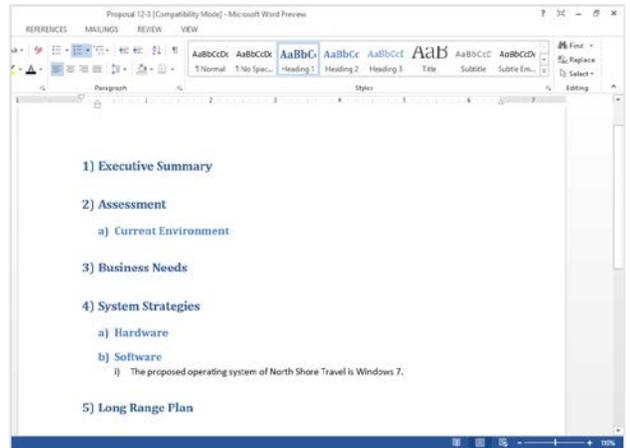


Figure 12-4: An outline with multilevel numbering.

Table 12-1: Multilevel List Numbering Options

1. _____ a. _____ i. _____	1) _____ a) _____ i) _____	1. _____ 1.1. _____ 1.1.1. _____
❖ _____ ➤ _____ ■ _____	Article I. Head Section 1.01 (a) Heading 3	1 Heading 1— 1.1 Heading 2— 1.1.1 Heading
I. Heading 1— A. Heading 2— 1. Heading 3—	Chapter 1 Hea Heading 2— Heading 3—	

Viewing an Outline

As a document grows longer and longer, it can become increasingly difficult to see its overall structure. Outline view can tame even the longest, wildest documents (provided they are organized by heading styles) and help you separate “the forest from the trees.” Outline view lets you decide how much of your document’s structure you want to see. You can collapse a heading and hide its subheadings and text, and expand a collapsed heading to display its subheadings and text.

Display all headings above a specific level

This command lets you view headings that are at or above a certain level. For example, choosing Level 2 displays all Heading 2 and Heading 1 headings.

1. Click the **VIEW** tab on the Ribbon and select **Outline** view. Click the **OUTLINING** tab and click the **Show Level** list arrow in the Outline Tools group.
2. Select a level from the list.
The level you selected and all headings above it are displayed. All other headings and body text are collapsed.

Expand a heading

The plus symbol indicates this heading contains subheadings and body text. Expand the heading to display anything under it.

1. Make sure the insertion point is in the heading.
2. In Outline view, click the **OUTLINING** tab on the Ribbon and click the **Expand** button in the Outline Tools group.
Other Ways to Expand a Heading:
 Double-click the heading plus symbol. Or, press **<Alt> + <Shift> + <+>**.

The heading expands, displaying subordinate text and subheadings.

Collapse a heading

You can also collapse the heading to hide any subheadings and text under it.

Exercise

- **Exercise File:** Proposal 12-4.docx
- **Exercise:** Open the document in Outline view. Show the Level 1 outline level. Show the Level 2 outline level. Expand the Long Range Plan heading, then collapse it again. Show all levels in the outline, then show the first line under each heading.

Show the text in the formatted styles — used for each heading

Choose the outline level you want to display.

Show the first line of body text under each heading.

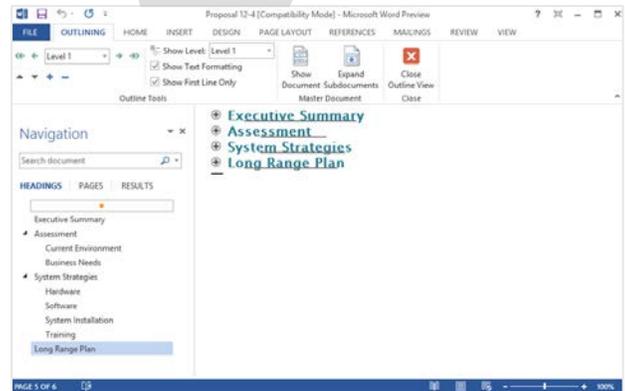


Figure 12-5: The outline with Level 1 displayed.

Expand Collapse

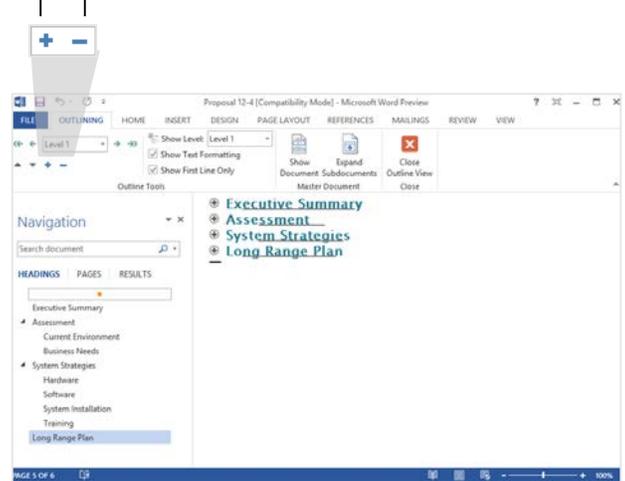


Figure 12-6: The outline with the Long Range Plan heading expanded.

1. Make sure the insertion point is in the heading.
2. In Outline view, click the **OUTLINING** tab on the Ribbon and click the **Collapse** button in the Outline Tools group.

- **Other Ways to Collapse a Heading:**
Double-click the heading minus symbol. Or, press **<Alt> + <Shift> + <->**.

The heading collapses, hiding subordinate text and subheadings.

Double-click a heading to expand or collapse it.

Display all levels

All of the text levels are now displayed with this command, including body text.

1. In Outline view, click the **OUTLINING** tab on the Ribbon and click the **Show Level** list arrow in the Outline Tools group.
2. Select **All Levels** from the list.
All the levels in the outline are displayed.

Display first line of body text under a heading

Instead of viewing all of the subordinate text in a document, sometimes it is useful to view only the first line of the body text under each heading.

- In Outline view, click the **OUTLINING** tab on the Ribbon and click the **Show First Line Only** check box in the Outline Tools group.

Only the first line of body text under each heading is shown. This gives you an idea of the content under each heading, without having to see all of the body text.

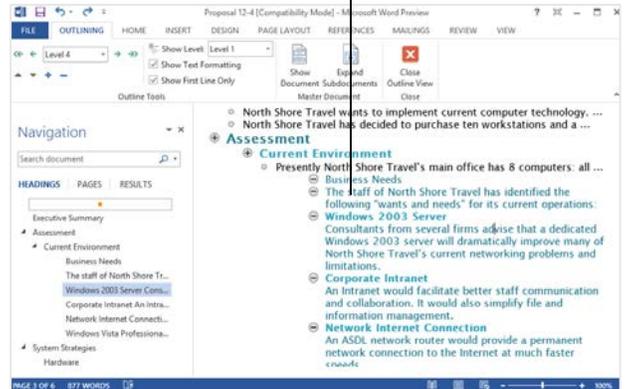


Figure 12-7: The outline with all levels shown.

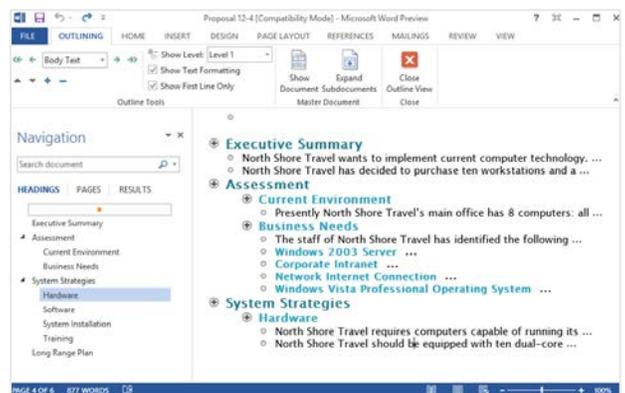


Figure 12-8: The outline with only first lines displayed.

Navigating Long Documents

Once you've created your long document using Outline view, you can use the Navigation Pane to browse headings and pages in longer documents while leaving the main document window open.

Navigate a long document

The Navigation Pane makes it easy to get from one place to the next in a document using its headings.

1. Click the **VIEW** tab on the Ribbon and click the **Navigation Pane** check box in the Show group.

The Navigation Pane appears, displaying the HEADINGS, PAGES and RESULTS tabs.

- 👉 **Other Ways to Open the Navigation Pane:**
 Press <Ctrl> + <F>. Or, click the **HOME** tab on the Ribbon and click the **Find** button in the Editing group.

2. Click the **HEADINGS** tab in the Navigation Pane.
The document's headings appear.

- ! **Trap:** Headings only appear if you are viewing a document that uses heading styles.

3. Click a heading.
The heading is displayed in the main document window.

Rearrange document headings

You can rearrange your document headings in the Navigation Pane.

- In the Navigation Pane, click the heading, drag it to the desired location, and release the mouse.
 The heading is moved, along with all the headings and body text beneath it,

Navigate document pages

You can also view thumbnails of all the pages in your document in the Navigation Pane.

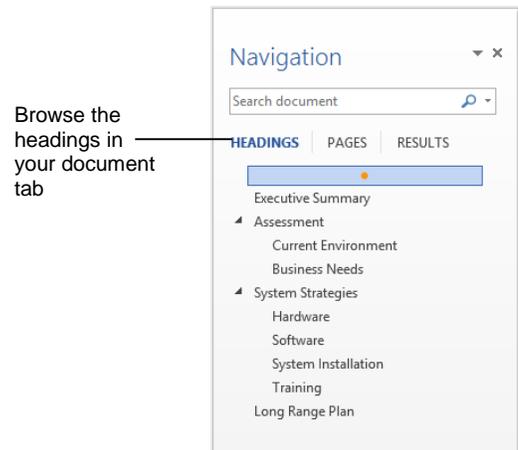
1. Click the **VIEW** tab on the Ribbon and click the **Navigation Pane** check box in the Show group.

The Navigation Pane appears, Select the **HEADINGS** tab, if it does not open onto it by default.

- 👉 **Other Ways to Open the Navigation Pane:**
 Press <Ctrl> + <F>. Or, click the **HOME** tab and click the **Find** button.

Exercise

- **Exercise File:** Proposal 12-5.docx.
- **Exercise:** Use the Navigation Pane to navigate to the Hardware subheading.



Browse the headings in your document tab

Figure 12-9: The Browse the headings in your document tab of the Navigation Pane.

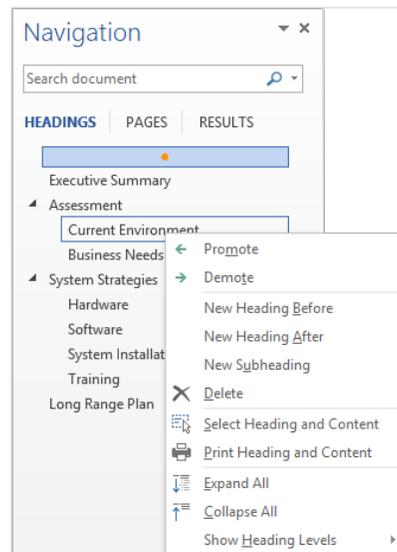


Figure 12-10: Rearrange document headings in the Navigation Pane.

2. Click the **PAGES** tab in the Navigation Pane.

The Navigation Pane displays thumbnail images of all the pages in the document.

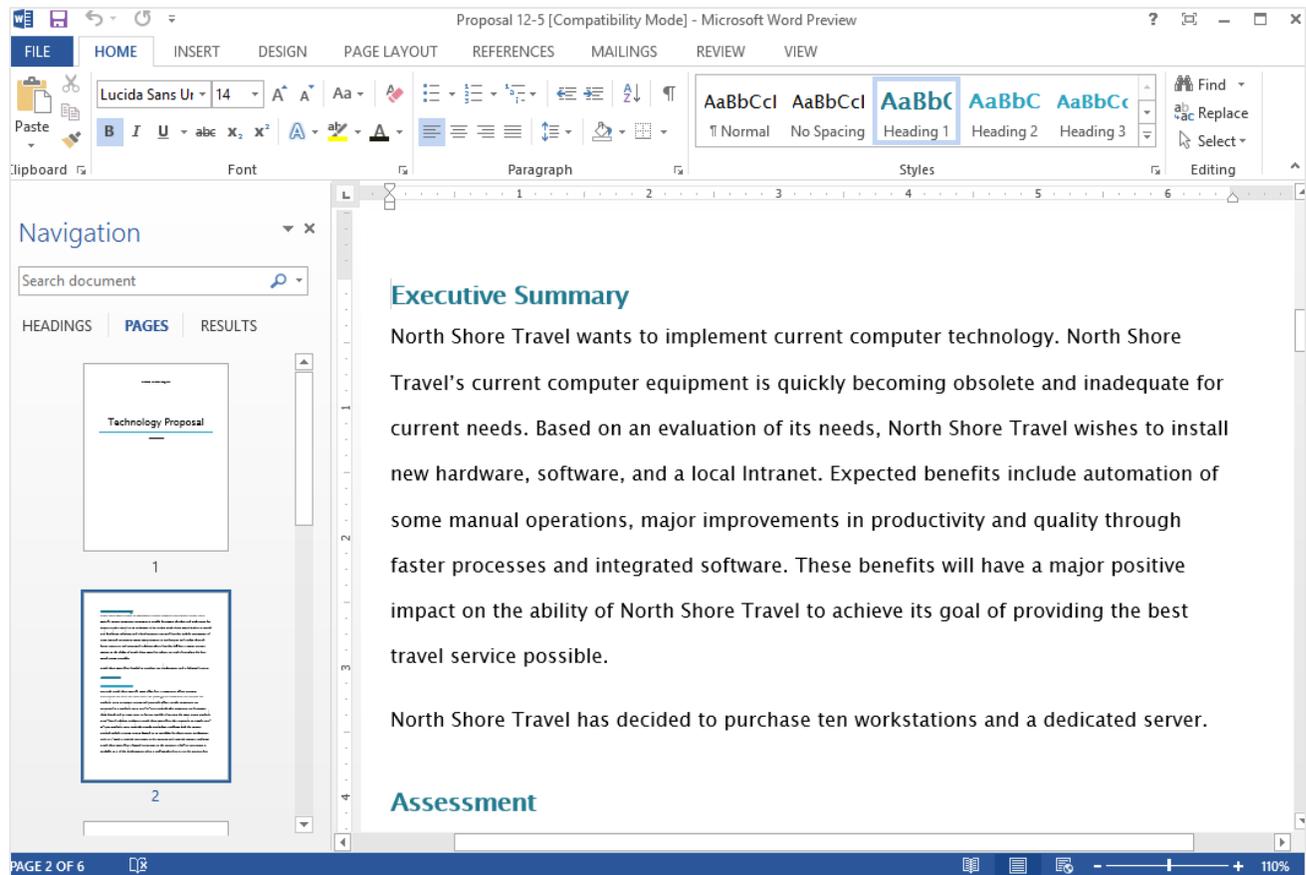


Figure 12-11: Click the Browse the pages in your document tab to view thumbnails of each page in your document.

Working with Master Documents

All you have to do to create a master document is insert one or more subdocuments into any document. Once you have created a master document and its subdocuments, you can start working on it. If the master document is stored on a network, several users can open and work on their own subdocuments at the same time. You can modify, rearrange, and delete the subdocuments in a master document. You can even convert a subdocument into the master document, so that it is actually part of the master document, instead of saved in a separate subdocument.

In this lesson, you will learn how to create a master document, how to delete a subdocument, and how to convert a subdocument into the master document.

Open Master Document view

First, you need to open Master Document view, which is part of Outline view.

1. Open a document in Outline view.
2. In Outline view, on the OUTLINING contextual tab on the Ribbon, click the **Show Document** button in the Master Document group.

The commands for creating and working with a master document appear.

Expand subdocuments

When a master document is opened, the subdocuments appear as links. To view the contents of the subdocuments rather than the links, expand the subdocuments.

- In Outline view, click the **OUTLINING** tab on the Ribbon and click the **Expand Subdocuments** button in the Master Document group.

The contents of the subdocuments are expanded in outline view. Go back to Print Layout view if necessary.

Insert a subdocument

A master document is a good way to create a long document that has several individual sections, like chapters in a book.

Exercise

- **Exercise File:** Proposal 12-6.docx, Recycling Needs.docx, and Bob's Report.docx
- **Exercise:** Open the Proposal 12-6.docx document in Master Document view and expand the Recycling Needs subdocument. Make the Recycling Needs subdocument part of the main document. Insert the Bob's Report document at the end of the Proposal 12-6.docx document.

Expand/Collapse Subdocuments

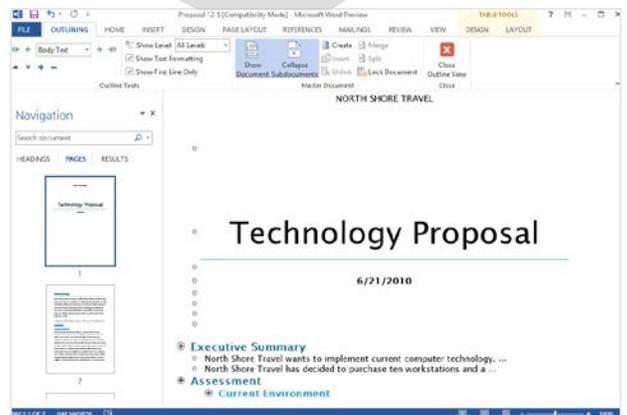
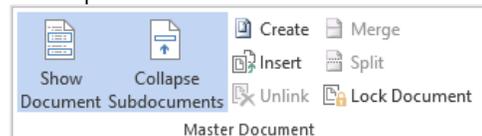


Figure 12-12: A master document with expanded subdocument.

1. Place the insertion point where you would like to insert the subdocument.
2. In Outline view, click the **OUTLINING** tab on the Ribbon and click the **Insert Subdocument** button in the Master Document group.

The Insert Subdocument dialog box appears.

! Trap: Any existing subdocuments need to be expanded before you can insert a new one.

3. Select the document you want to insert and click **Open**.

The subdocument is inserted in the document. You can see that the subdocument has a thin black border surrounding it.

Make a subdocument part of the master document

Removing a subdocument puts the content of the document into the main document, rather than linking it to the subdocument file.

1. Select the subdocument.
You can either select the entire subdocument, or just place your insertion point in the subdocument.
2. In Outline view, click the **OUTLINING** tab on the Ribbon and click the **Unlink** button in the Master Document group.
The link to the subdocument is removed and the content of the subdocument is copied into the master document.

Remove a subdocument

If you find that you do not want to include a subdocument in the master document after all, you can remove it from the master document.

1. In Outline view, click the subdocument's icon  and press **<Delete>**.

The subdocument is removed from the master document. This does not remove the content from the subdocument, however.

✓ Tip: A subdocument must be removed before the master document is saved.

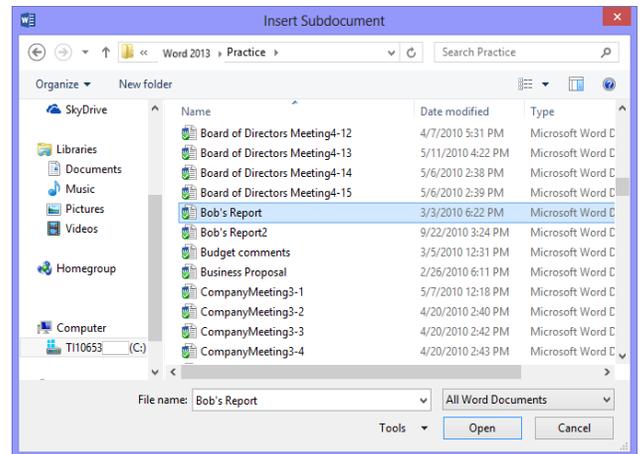


Figure 12-13: Select the subdocument you want to insert in the master document in the Insert Subdocument dialog box.

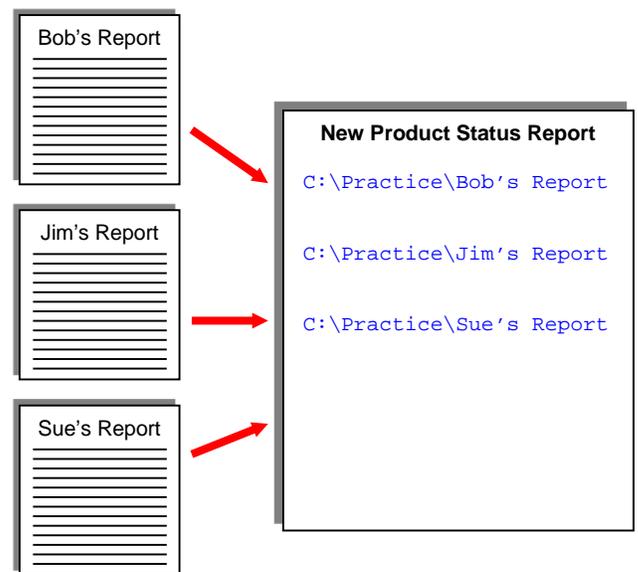


Figure 12-14: An example of how subdocuments are inserted in a master document.

Using Bookmarks

A bookmark in Word is just like a bookmark that you would use to mark your place in a novel. You use bookmarks in Word to mark a location in a document so that you can quickly find and jump back to that location. Bookmarks can also be used to create cross-references. For example, you could bookmark a paragraph about armadillos and then create a cross-reference to that bookmark.

Insert a bookmark

Bookmarks can be used as markers in a document. They can also be used to run certain fields in Word. For example, one of the Rules fields in a mail merge requires a bookmark to be used.

1. Place your insertion point or select the text where you want to insert the bookmark.

If you want to use a bookmark for a certain field in Word, you will probably select text to insert the bookmark for that purpose.

2. Click the **INSERT** tab on the Ribbon and click the **Bookmark** button in the Links group.

The Bookmark dialog box appears.

3. Click the **Bookmark name** text box and enter a name for the bookmark.

Bookmarks can be from 1 to 40 characters in length, must begin with a letter, and can only contain numbers, letters, or the underscore character—no spaces.

4. Click **Add**.

The dialog box closes and the bookmark is inserted in the document.

Go to a bookmark

Once a bookmark is inserted, you can use the bookmark to quickly jump to the location in the document.

1. Click the **HOME** tab on the Ribbon and click the **Find** button list arrow in the Editing group.

A list of editing options appears.

- **Other Ways to Open the Go To Dialog Box:**
Press <Ctrl> + <G>.

- ✔ **Tip:** If the Ribbon is not wide enough, the Editing group will appear as the Editing button.

Exercise

- **Exercise File:** Proposal 12-7.docx
- **Exercise:** Select the “Long Range Plan” heading and insert a LongRangePlan bookmark. Go to the beginning of the document, then quickly jump to the LongRangePlan bookmark you just inserted.

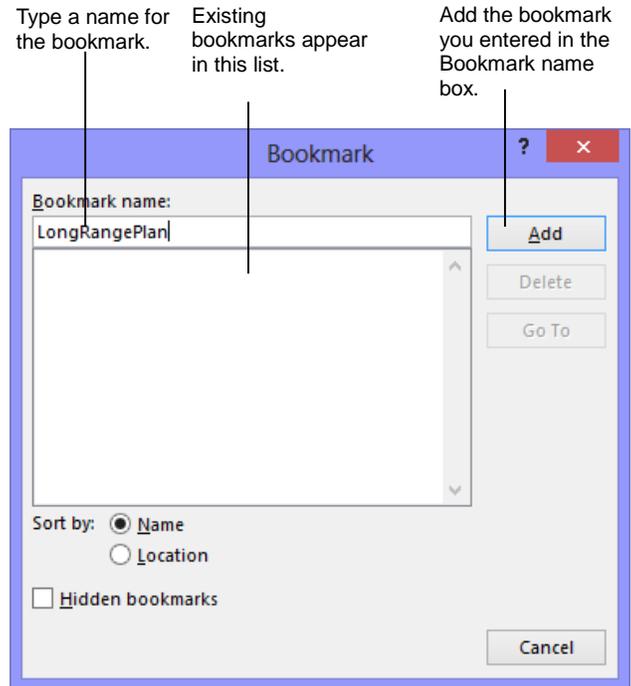


Figure 12-15: The Bookmark dialog box.

2. Select **Go To** from the list.

The Go To tab of the Find and Replace dialog box appears.

3. Select **Bookmark** in the Go to what list.

4. Click the **Enter bookmark name** list arrow and select the bookmark name.

5. Click the **Go To** button.

The insertion point jumps to the location in the document.

Other Ways to Go To a Bookmark:

Click the **INSERT** tab on the Ribbon and click the **Bookmark** button in the Links group. Select the bookmark in the Bookmark dialog box and click **Go To**.

Select Bookmark from the Go to what list...

...then select the bookmark's name from the list and click Go To.

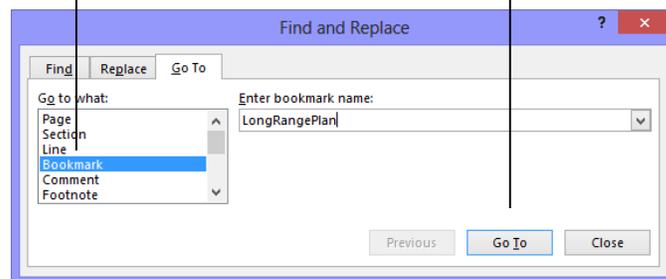


Figure 12-16: The Go To tab of the Find and Replace dialog box.

Using Cross-references

A cross-reference points the reader to another part of the document where they can find more information about something, such as: “See Penguin Feeding Behaviors on Page 17 for more information.” When the page number is cross-referenced, the reference will automatically update if the page number changes. For example, if Page 17 all of a sudden became Page 14, the cross-reference would automatically update to say “Page 14”.

Insert a cross-reference

Before inserting a cross-reference, make sure you know what it is that you want to reference.

1. Place your insertion point where you want to insert the cross-reference.

2. Click the **INSERT** tab on the Ribbon and click the **Cross-reference** button in the Links group.

The Cross-reference dialog box appears.

3. Click the **Reference type** list arrow and select the type of item you want to reference.

You can cross-reference many types of items such as bookmarks, headings, and more. The first thing you have to do is specify which type of item you want to cross-reference.

4. Click the **Insert reference to** list arrow and select the item you want to reference.

The items that are available for the reference are displayed in the “For which numbered item”.

5. Select the item you want to reference to in the **For which...** box.

6. Click **Insert**.

The cross-reference field is inserted in the document.

Tip:

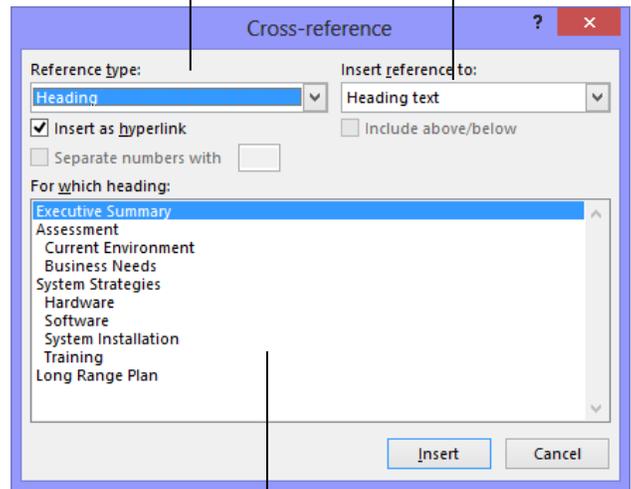
- ✓ Cross-reference fields need to be updated if the item they reference is moved. You can manually update a cross-reference by right-clicking the cross-reference and selecting **Update Field**. Or, have Word update your document’s fields. Click the **FILE** tab and click the **Options** button. Click the **Display** category and make sure the **Update fields before printing** check box is selected.

Exercise

- **Exercise File:** Proposal 12-8.docx
- **Exercise:** Insert a cross-reference after “limitations.” on page 3 to the Hardware heading.

Select the type of item for which you want to create a cross-reference. See the table below for more information.

Select the information you want to include in the cross-reference. See the table below for more information.



Select the item you want to cross-reference.

Figure 12-17: The Cross-reference dialog box.

Table 12-2: What Can Be Included in a Cross-Reference

You can cross-reference these items:	Cross-references can include this information:
Numbered Items	Entire caption
Headings	Example: See Figure 3-2: Rainfall .
Bookmarks	Only label and number
Footnotes	Example: See Figure 3-2 .
Endnotes	Page number
Equations	Example: See Page 10 .
Figures	Only caption text
Tables	Example: See Rainfall .

Creating a Table of Contents Using Heading Styles

Word can easily create a table of contents for your documents using the document’s heading styles for the headings in the table of contents. For example, paragraphs formatted with the Heading 1 style would be main headings in the table of contents, and paragraphs formatted with the Heading 2 style would be sub-headings, and so on.

Mark text with built-in headings

The easiest way to create a table of contents is by applying built-in styles to the text you want to include in the table of contents.

1. Select the heading to which you want to apply a heading style.
2. Click the **HOME** tab on the Ribbon. Select the heading you want to use in the Style gallery in the Styles group.

The heading style is applied to the text.

✔ **Tip:** If you don't see the style that you want, click the **More** button to expand the Style gallery.

Insert a built-in table of contents

Microsoft Word comes with built-in tables of contents. This is the simplest way to insert a table of contents in your document. However, you can’t control how the table of contents appears as much as if you insert a different table of contents.

1. Place the insertion point where you want the table of contents.
2. Click the **REFERENCES** tab on the Ribbon and click the **Table of Contents** button in the Table of Contents group.

A list of built-in tables of contents appears.

3. Select the built-in table of contents you want to use.
The table of contents is inserted in the document.

Insert a table of contents

Inserting a table of contents this way allows you to control how the text of the table of contents appears, and other aspects, such as if page numbers appear.

Exercise

- **Exercise File:** Proposal 12-9.docx
- **Exercise:** Insert a built-in table of contents at the bottom of the first page of the document. (Text has already been marked with heading styles.)

Heading 1.....	1
Heading 2.....	2
Heading 3.....	4
Heading 3.....	6
Heading 2.....	7
Heading 1.....	9

Figure 12-18: An example of how the table of contents is compiled using heading styles.

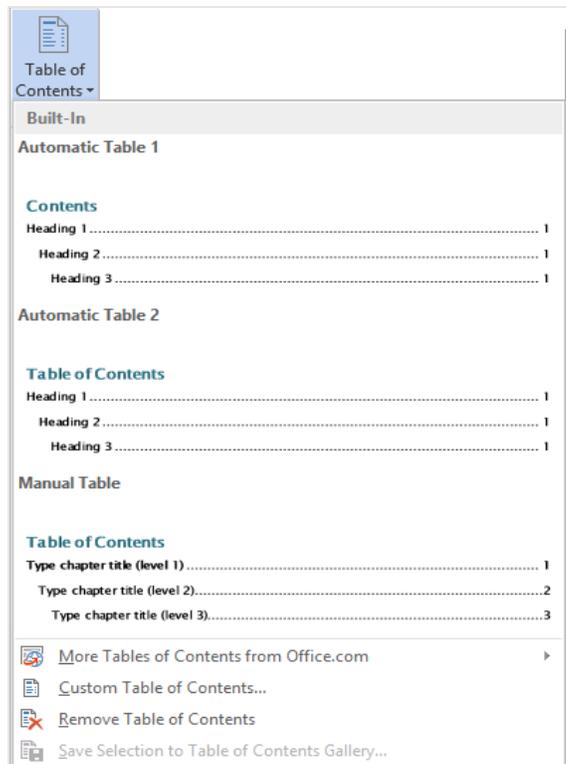


Figure 12-19: Built-in table of contents. This is the easiest way to insert a table of contents.

1. Place the insertion point where you want the table of contents to be.

This is probably near the beginning of the document.

2. Click the **REFERENCES** tab on the Ribbon and click the **Table of Contents** button in the Table of Contents group.

A list of table of contents options appears.

3. Select **Custom Table of Contents** from the list.

The Table of Contents dialog box appears.

A preview of how the table of contents would look with the selected format appears in the Print Preview box. You can choose a different format for the table of contents.

4. Click the **Formats** list arrow and select the format you want to use.

A preview of the format appears in the Print Preview area of the dialog box.

5. Format the settings of the table of the contents.

A list of the different settings is described in the table to the right.

6. Click **OK**.

The table of contents is inserted in the document.

Update the table of contents

If the content of the document changes, you can easily update the table of contents to include new and changed information.

1. Click the **REFERENCES** tab on the Ribbon and click the **Update Table** button in the Table of Contents group.

A dialog box appears, asking what you want to update.

2. Click **Update page numbers only** or **Update entire table**. Click **OK**.

Other Ways to Update the Table of Contents: Right-click the table of contents and select **Update Field** from the contextual menu. Or, click anywhere in the table of contents and press **<F9>**.

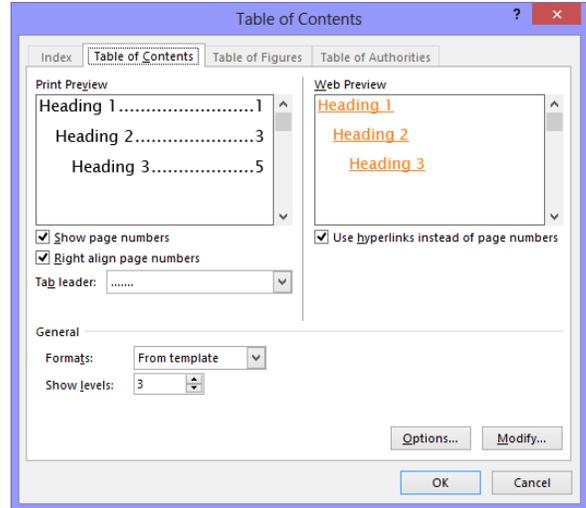


Figure 12-20: The Table of Contents tab of the Table of Contents dialog box.

Table 12-3: Table of Contents Dialog Box

Show page numbers	Check or uncheck this setting to include page numbers in the table of contents.
Right align page numbers	If this setting is not selected, the page numbers will be shown right after the heading in the table of contents.
Tab leader	Select a dotted, dash, or line tab leader between the heading and the page number.
Formats	Select how the formatting of the table of contents appears in the document.
Show levels	Choose which outline levels you want to include in the document. You can display up to nine levels in the table of contents, according to the outline.
Options	Choose what you want the table of contents to be built from: styles, outline levels, or table entry fields.

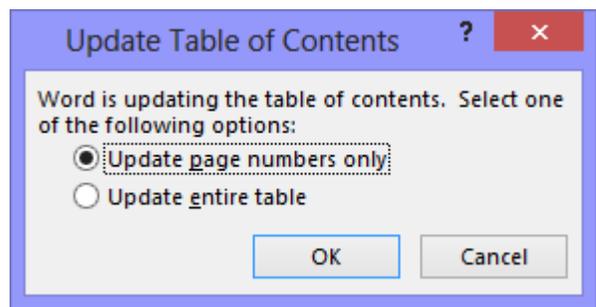


Figure 12-21: The Update Table of Contents dialog box.

Creating a Table of Contents Using TC Entries

Most of the time you will want to create a table of contents using the heading style method, but there may be a time when you need to use something more advanced—using TC (table of contents) entries.

Inserting TC entries to indicate table of contents entries isn't nearly as fast as the heading style method, but it provides more flexibility. For example, if your document doesn't contain any heading styles or outline levels—but you still want a table of contents—use TC entries. Or, if you want to use text that is different from your document's heading styles in the table of contents, you would use TC entries to create a table of contents that uses the text you want.

There are several benefits to using a table of contents created with TC entries:

- No styles are required.
- You can use several tables of contents that contain different information in the same document.

Create a table of contents entry

Mark text you want to include in the table of contents by assigning a level to it.

1. Place the insertion point where you want to insert the table of contents entry.

You can also select text that you want to create the table of contents entry from, and the text will appear in the table of contents dialog box.

2. Press <Alt> + <Shift> + <O>.

The Mark Table of Contents Entry text box appears. If you selected text before opening the dialog box, it appears in the Entry text box.

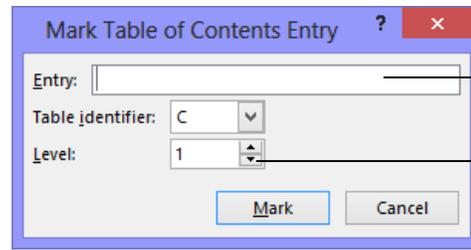
3. Click the **Entry** text box and enter the text you want to appear in the table of contents.

There are two other specifications you need to make in the dialog box:

- **Table identifier:** Assign the TC entry to a specific table in the document. For example, you could have a different table of contents for each section of a document.
- **Level:** Assign a level to the text. Main headings are level 1, and so on.

Exercise

- **Exercise File:** Proposal 12-10.docx
- **Exercise:** Create a table of contents entry that says “A Look at the Problem” at the beginning of the Executive Summary heading on page 3. Create another table of contents entry for the “Corporate Intranet” text on page 4. Update the table of contents at the beginning of the document to include TC fields.



Type what you want to appear in the table of contents entry.

Select the level of the table of contents entry.

Figure 12-22: The Mark Table of Contents Entry dialog box.

4. Select the table and level settings you want to use and click **Mark**.

The entry is inserted in the document.

5. Click **Close**.

The dialog box is closed.

Insert a table of contents from TC fields

Once the TC fields are inserted, you can create the table of contents from the TC fields. You may also change table settings so that it simply includes the TC entries with the rest of the table of contents.

1. Place the insertion point where you want the table of contents.
2. Click the **REFERENCES** tab on the Ribbon and click the **Table of Contents** button in the Table of Contents group.

A list of table of contents options appears.

3. Select **Custom Table of Contents** from the list.

The Table of Contents dialog box appears.

4. Click **Options**.

The Table of Contents Options dialog box appears. Select the check boxes for how you want to build the table of contents.

5. Click the **Table entry fields** check box.

You can also remove check boxes from the other options to avoid including them in the table of contents with the TC fields.

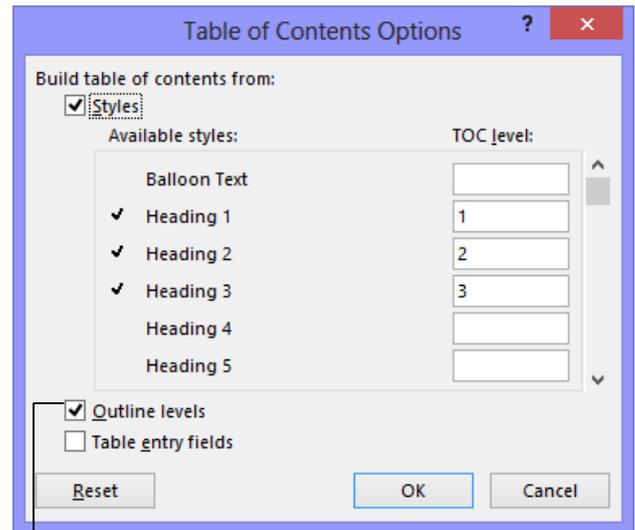
6. Click **OK**.

7. Click **OK**.

The table of contents is inserted in the document.

✓ Tip:

- ✓ To insert table of contents with different table identifiers, insert the table of contents field. Select the table of contents field, right-click the field and select **Toggle Field Codes**. After the f switch in the code, enter the letter of the field identifier. For example, if you wanted all TC fields for table C to appear, the field would look like this: `{TOC \O "1-3" \f c}` where “1-3” are the levels in the table of contents and “c” is the table identifier.



Builds a table of contents by using TC fields instead of, or in addition to, styles.

Figure 12-23: The Table of Contents Options dialog box.

Working with Picture Captions

Captions and tables of figures are a great way to organize and reference documents that have a lot of pictures.

Insert a picture caption

If you have diagrams or pictures in your document that you want to label and reference, inserting captions is one of the easiest ways to do this.

1. Select the picture you want to caption.
2. Click the **REFERENCES** tab on the Ribbon and click the **Insert Caption** button in the Captions group.

The Caption dialog box appears.

By default, the caption label “Figure 1” appears in the Caption text box.

3. Enter the caption after the text in the Caption text box.

There are several different options you can use to change the caption settings in the dialog box. See **Table 12-4: Caption Options** to the right for more information about these settings.

4. Click **OK**.

The caption is inserted.

 **Tip:**

- ✓ The number in the caption automatically updates if the picture is moved in the document.

Insert a table of figures

Once captions have been inserted, you can insert a table of figures. This is very similar to a table of contents: it displays each caption and the page on which that caption appears.

1. Place the insertion point where you want the table of figures.

This is probably near the beginning of the document.

2. Click **REFERENCES** tab on the Ribbon and click the **Insert Table of Figures** button in the Captions group.

The Table of Figures dialog box appears.

 **Exercise**

- **Exercise File:** Proposal 12-11.docx
- **Exercise:** Insert a caption that says, “Dell Latitude D630 laptop” under the laptop picture on page 5.

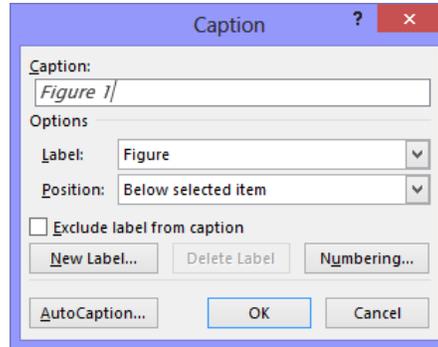


Figure 12-24: The Caption dialog box.

Table 12-4: Caption Options

Label	Choose from three preset labels: Figure, Equation, Table.
Position	Insert the caption below or above the selected item.
Exclude label from caption	Select this check box so that only the text you enter is included with the picture. The label and number are not included.
New Label	Create a new label to choose from under the Label list arrow.
Delete Label	Remove a label you created under the New Label button.
Numbering	Change the numbering format of numbers in the caption labels. For example, include the chapter number in the label.
AutoCaption	Choose this option to automatically add a caption when certain items are inserted in the document.

A preview of how the table of figures would look with the selected format appears in the Print Preview box. You can choose a different format for the table of contents.

3. Click the **Formats** list arrow and select the format you want to use.

A preview of the format appears in the Print Preview area of the dialog box.

4. Select the settings of the table of the figures.

A list of the different settings is described in the table to the right.

5. Click **OK**.

The table of figures is inserted in the document.

Table 12-5: Table of Figures Settings

Show page numbers	Check or uncheck this setting to include page numbers in the table of figures.
Right align page numbers	If this setting is not selected, the page numbers will be shown right after the heading in the table of contents.
Tab leader	Select a dotted, dash, or line tab leader between the heading and the page number.
Formats	Select how the formatting of the table of contents appears in the document.
Caption label	Choose text to appear in front of the caption: None, Equation, Figure, Table.
Include label and number	If this check box is not selected, only the text of the caption will appear in the table of figures. The captions will not be labeled or numbered.
Options	Choose what you want the table of contents to be built from: styles, outline levels, or table entry fields.

Creating an Index

An index can usually be found at the end of a document, and lists the words and phrases in a document, along with the page numbers they appear on. There are two steps involved in creating an index: defining which word(s) you want to appear in the index and then inserting the index.

Insert an index entry

To include a word or phrase in the index, you must mark it with an index entry.

1. Select the text you want to include in the index.
2. Click the **REFERENCES** tab on the Ribbon and click the **Mark Entry** button in the Index group.

The Mark Index Entry dialog box appears.

- 🔍 **Other Ways to Mark an Index Entry:**
 Press <Alt> + <Shift> + <X>.

3. Select the type of index entry you want to insert.

There are three different types to choose from:

- **Cross-reference:** Adds a cross-reference as an index entry instead of a page number.
- **Current page:** Lists the current page number for the selected index entry. This is the default option.
- **Page range:** Lists a range of pages that are included in the bookmark that you click in the Bookmark list. You must first mark the range of pages with a bookmark.

4. Click **Mark** or **Mark All**.

Mark All marks every occurrence of the text in the document as index entries, whereas Mark only includes an entry for the single occurrence.

- ✔ **Tip:** Be careful if you use Mark All—you may end up with a lot of meaningless index entries that you really didn't want.

5. Click **Close** when you are finished marking entries.

The dialog box closes.

- ✔ **Tip:**
 - ✓ Index entries are invisible and will not be printed. However, you can see them when the Show/Hide All button is set to Show All.

Exercise

- **Exercise File:** Proposal 12-12.docx
- **Exercise:** Create an index entry for the “Hardware” heading on page 4. Create an index entry for all instances of “Windows 7”. Insert a one-column modern index at the end of the document.

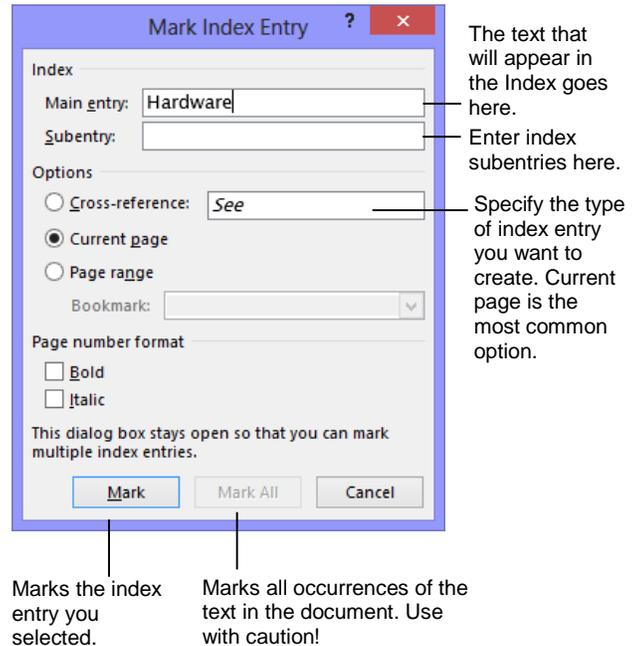


Figure 12-25: The Mark Index Entry dialog box.

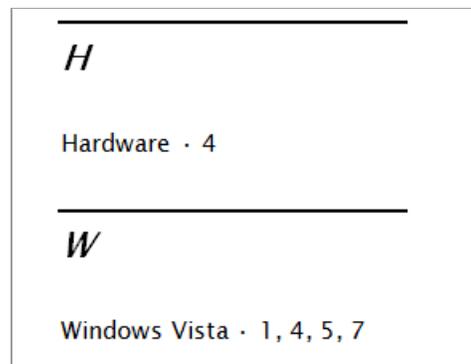


Figure 12-26: A preview a one-column index in modern format.

Insert an index

Once index entries have been inserted, you're ready to insert the index.

1. Place your insertion point where you want to insert the index.
Usually you will want to insert the index at the end of the document.

2. Click the **REFERENCES** tab on the Ribbon and click the **Insert Index** button in the Index group.
The Index dialog box appears.

3. Specify formatting options for the index.
There are several options for specifying how the index will appear in the document, such as the **Formats** list, which changes the formatting of the index.

4. Click **OK**.
The index is inserted in the document.

Right align page numbers	If this setting is not selected, the page numbers will be shown right after the heading in the table of contents.
Tab leader	Select a dotted, dash, or line tab leader between the heading and the page number.
Formats	Select how the formatting of the table of contents appears in the document.
Type	Select whether you want each sub entry to be indented under the primary entry, or if you want to consolidate the entries into one sentence.
Columns	Select how many columns you want to appear in the index.
Language	Select the language for the table of contents.

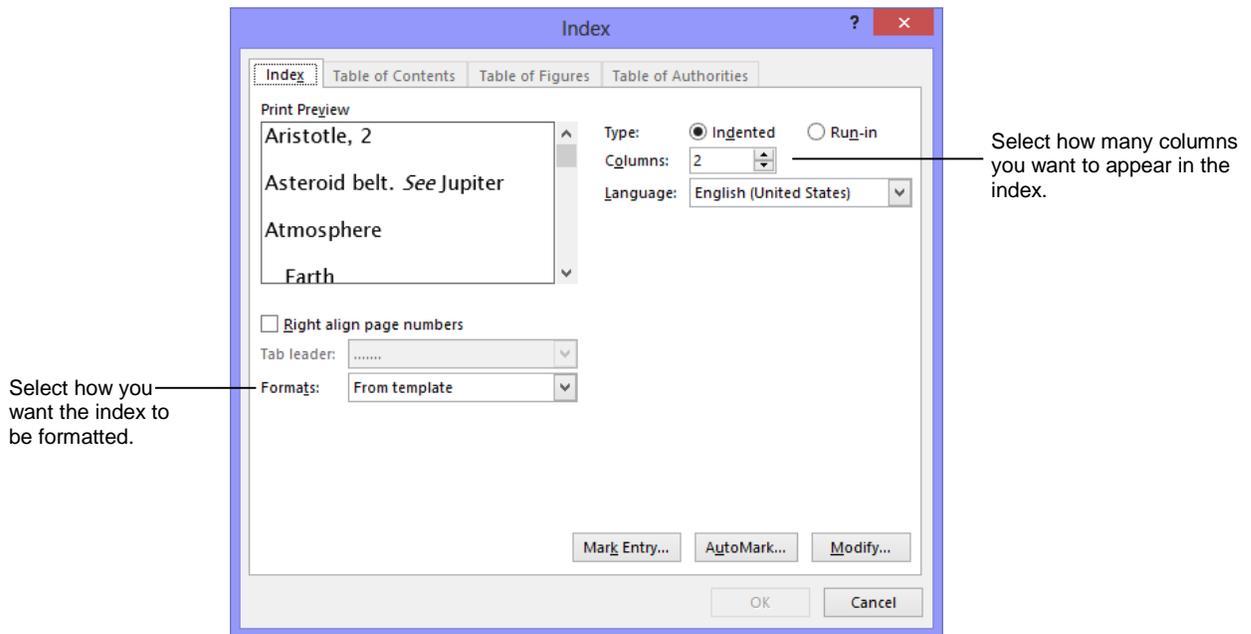


Figure 12-27: The Index dialog box.

Using Footnotes and Endnotes

You're probably already familiar with footnotes and/or endnotes if you have ever had to write a paper for an English class. Footnotes and endnotes explain, comment on, or provide references for text in a document. Footnotes appear at the bottom, or the foot, of each page in a document, while endnotes appear at the end of a document. Other than that, they work the same way.

Footnotes and endnotes have two linked parts: the note reference mark (usually a number) and the corresponding footnote or endnote. Word automatically numbers footnote and endnote marks for you, so when you add, delete, or move notes, they are automatically re-numbered.

Insert a footnote

A footnote appears on the same page as the text it explains.

1. Place the insertion point where you want to insert the footnote.
2. Click the **REFERENCES** tab on the Ribbon and click the **Insert Footnote** button in the Footnotes group.

Word inserts a footnote number at the insertion point and moves the insertion point to the bottom of the page, where you can type the footnote.

3. Type the footnote in the footnote area.
The footnote is inserted.

Insert an endnote

An endnote appears at the end of the section or document.

1. Place the insertion point where you want to insert the endnote.
2. Click the **REFERENCES** tab on the Ribbon and click the **Insert Endnote** button in the Footnotes group.

Word inserts an endnote number at the insertion point and moves the insertion point to the bottom of the page, where you can type the endnote.

3. Type the endnote in the endnote area.
The endnote is inserted.

Exercise

- **Exercise File:** Proposal 12-13.docx
- **Exercise:** Insert a footnote after the text “Network Internet Connection” on page 4 that says, “Using Fast-Connect as an Internet Service Provider.” Edit the footnote so it reads, “Using Quick-Connect as an Internet Service Provider.” View the footnote, then delete it.

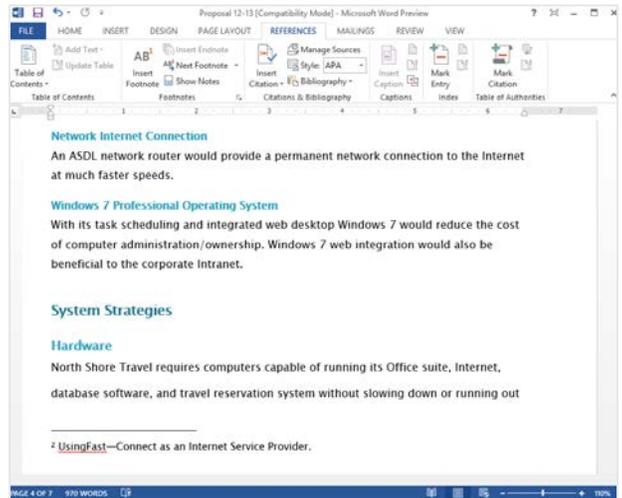


Figure 12-28: A footnote is inserted at the bottom of the page in a document.

View a footnote or endnote

You don't have to scroll down to the bottom of the page or the end of the document to view what a footnote or endnote says.

Position the pointer over the footnote or endnote number for several moments. The contents of the footnote or endnote appear in a small pop-up window.

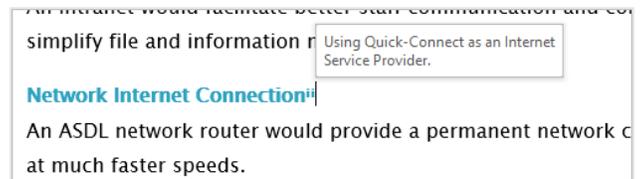


Figure 12-29: A preview of the endnote in the document.

Edit a footnote or endnote

You don't have to scroll down to the bottom of the page or the end of the document to edit a footnote or endnote.

1. Double-click the footnote or endnote number.
Word jumps to the footnote text.
2. Edit the text in the footnote or endnote.
Once the text is edited, you can return to the rest of the document.

Delete a footnote or endnote

Deleting a footnote or endnote is easy.

- Select the footnote or endnote number and press the **<Delete>** key.
The footnote or endnote number and reference are deleted.

✔ **Tip:**

- ✓ Click the **Dialog Box Launcher** in the Footnotes group to open the Footnote & Endnote dialog box.

Using Citations and Bibliographies

Academic papers rely on citing the sources of research. This lesson shows how Word can make citing sources and creating a bibliography very easy.

Add a source to the Source Manager

When sources are entered for the document, the information is saved so that it is easy to cite the source again, and it's also easy to compile the bibliography.

1. Place the insertion point where you want to insert the citation.
2. Click the **REFERENCES** tab on the Ribbon and click the **Insert Citation** button in the Citations & Bibliography group.

3. Select **Add New Source**.

The Create Source dialog box appears.

- ✔ **Tip:** Select **Add New Placeholder** to insert a citation and add the source information later. Be sure to insert the same numbered placeholder for citations that use the same source. Edit the placeholder's information in the Source Manager.

4. Enter the source information in the dialog box.

5. Click **OK**.

A citation is inserted in the document where the insertion point is located. The source is also saved, so it can be cited again in the document and included in the bibliography.

Open the Source Manager

When a source is added, it is saved in the Master List for sources. That means the source will be available in other documents as well. Just copy the source from the Master List into the Current List in the Source Manager.

- Click the **REFERENCES** tab on the Ribbon and click the **Manage Sources** button in the Citations & Bibliography group.

Insert a citation from the Source Manager

Once the source has been inserted, it is easy to insert citations from the source.

1. Position the insertion point where you want to insert the citation.

Exercise

- **Exercise File:** Proposal 12-14.docx
- **Exercise:** Go to the bottom of page 5 and click at the end of the first full sentence under the Software heading. Add a new source with the information from the figure below. Insert another reference to the J. Chen source at the end of the sentence above the System Installation heading on page 6. Insert a bibliography after the index at the end of the document.

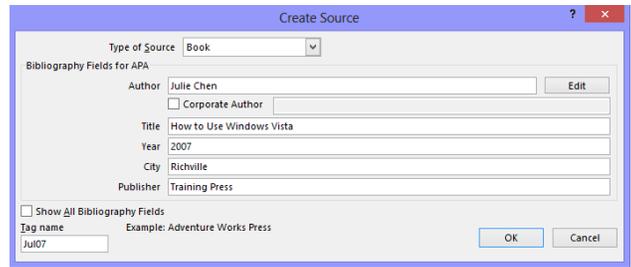


Figure 12-30: Creating a new source in the Edit Source dialog box.

The Source Manager stores and keeps track of all sources created in Word. The Master List (left column) saves all sources that have ever been added. The Current List (right column) includes sources that can be cited in the current document.

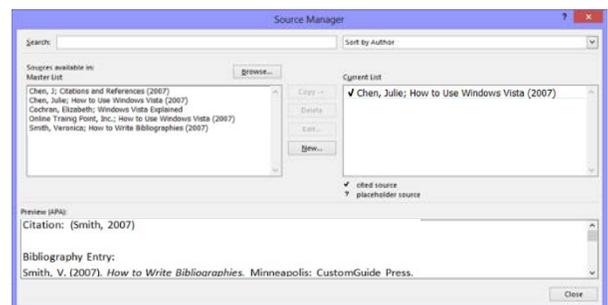


Figure 12-31: The Source Manager stores and keeps track of all sources created in Word.

2. Click the **REFERENCES** tab on the Ribbon and click the **Insert Citation** button in the Citations & Bibliography group.

A list of citations already inserted in the document appear.

✓ **Tip:** Select **Add New Source** if no sources have been created.

3. Select the citation you want to reference.
The citation is inserted in the document.

Insert a bibliography

Once you have cited sources in the document, you can create a bibliography that contains all the sources in the Current List of the Source Manager.

1. Navigate to the location where you want to insert the bibliography.

Most likely, you'll want to insert the bibliography at the end of the document.

2. Click the **REFERENCES** tab on the Ribbon and click the **Bibliography** button in the Citations & Bibliography group.

A list of built-in options appears. You can choose either of these built-in options to insert the bibliography with heading text and formatting. Or, select **Insert Bibliography** to insert only the sources.

3. Select the built-in bibliography you want to insert.
The cited sources are inserted in the document.

✓ **Tips:**

- ✓ Select **Insert Bibliography** to open the Bibliography dialog box and create your own bibliography.
- ✓ If buttons are grayed out in the Citations & Bibliography group, there may be a problem with your installation of Word. Repair Office through Programs and Features in the Control Panel.

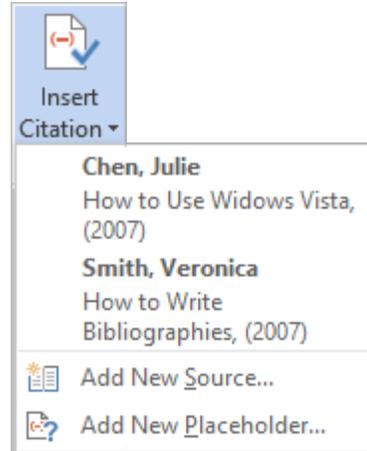


Figure 12-32: Select a citation from the list.

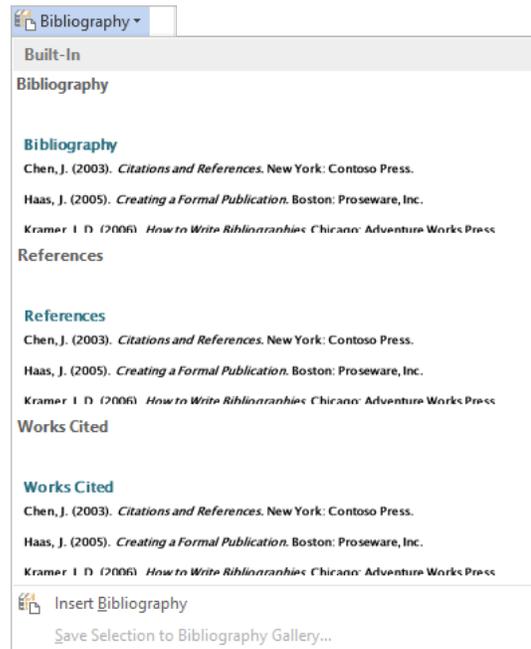


Figure 12-33: Select a built-in bibliography or click Insert Bibliography to create your own.

Working with Outlines, Long Documents, and References Review

Quiz Questions

- 1.
2. When you view a document in Outline view, the _____ contextual tab appears on the Ribbon.
 - A. Organizing
 - B. Numbering
 - C. Outlining
 - D. Typing
3. To change a heading to body text, you must promote it. (True or False?)
4. To select a multilevel numbering scheme, click the _____ button in the Paragraph group of the Home tab on the Ribbon.
 - A. Executive Summary
 - B. Heading
 - C. Numbering
 - D. Multilevel List
5. If a heading contains subheadings and body text, it is indicated with:
 - A. gray highlighting
 - B. A plus symbol
 - C. A heading link
 - D. An asterisk.
6. You can expand a heading to show the first line of body text. (True or False?)
7. You cannot use the Navigation Pane to rearrange document headings. (True or False?)
8. How do you create a Master Document?
 - A. Insert one or more subdocuments.
 - B. Click the Show Document button.
 - C. Save the document as a .MST file.
 - D. Unlink the document from the Subdocument file
9. When a master document is opened, the subdocuments appear as links. (True or False?)

10. You can not use spaces when you create a name for a bookmark. (True or False?)
11. Which of the following will open the Go To dialog box?
 - A. Pressing <Ctrl> + <G>.
 - B. Clicking the Go To button on the File taskbar.
 - C. Clicking the Page file, then selecting Go To from the Search group.
 - D. Any of these methods will open the Go To dialog box.
12. You can update a cross reference field by right-clicking the reference and selecting Update Field. (True or False?)
13. When would you choose not to use a built-in Table of Contents?
 - A. If you are using a document that contains embedded or linked objects.
 - B. If you are using an index as well as a table of contents.
 - C. If you want more control to adjust settings to change the way the table of contents appears.
 - D. If you want to choose the insertion point for the table of contents.
14. You must include page numbers when you create a table of contents (True or False?)
15. What are the benefits to using TC entries to create a table of contents?
 - A. TC Entries are faster to create than the heading style method.
 - B. With TC Entries, you can use several tables of contents with different information in the same document.
 - C. Only TC Entries let you mark each section with a different title.
 - D. All of these are good reasons to use a TC Entries table of contents.
16. The keyboard shortcut to open a Mark Table of Contents Entry is:
 - A. <Alt> + <T>
 - B. <Ctrl> + <Alt> + <C>
 - C. <Shift> + <Ctrl> + <C>
 - D. <Alt> + <Shift> + <O>.
17. You need to update the caption number if the picture is moved in the document.(True or False?)
18. Which of the following options can be changed in a Table of Figures?
 - A. Show or hide page numbers.
 - B. Line up page numbers along the right side of the page.
 - C. Choose which text appears with the caption.
 - D. All of these options can be changed in a Table of Figures.
19. Index entries are:
 - A. Visible unless you click the Show/Hide button.
 - B. Invisible unless you click the Show/Hide button.
 - C. Temporary unless you save a cross-reference.
 - D. The same as Table of Contents entries.
20. The Mark Entry button is located in the Index group of the References tab on the Ribbon. (True or False?)
21. A reference note that appears at the bottom of a page is called:
 - A. An endnote.

- B. A footnote
 - C. A page-end reference diacritical mark
 - D. A legume.
22. The Footnotes group is located on the _____.
- A. References tab on the Ribbon.
 - B. Options tab on the Ribbon.
 - C. The endnotes command on the Office button.
 - D. The only way to access footnotes is through a keyboard shortcut.
23. A source can only be cited once within a document. (True or False?)
24. When you insert a built-in bibliography, you can choose to insert formatting and heading text above the bibliography, or only insert the sources. (True or False?)

Quiz Answers

- 1.
2. C. When you view a document in Outline view, the Outlining contextual tab appears on the Ribbon.
3. False. To change a heading to body text, you must demote it.
4. D. To select a numbering scheme, click the Multilevel List button in the Paragraph group of the Home tab on the Ribbon.
5. B. If a heading contains subheadings and body text, it is indicated with a plus symbol.
6. True. You can expand a heading to show only the first line of body text.
7. False. You can use the Navigation Pane to rearrange document headings.
8. A. To create a master document, insert one or more subdocuments into any document.
9. True. When a master document is opened, the subdocuments appear as links.
10. True. You cannot use spaces when you create a name for a bookmark.
11. A. You can open the Go To dialog box by pressing <Ctrl> and <G> on your keyboard.
12. True. You can update a cross reference field by right-clicking the reference and selecting Update Field.
13. C. The built-in table of contents does not offer as much control to adjust settings or change the way the table of contents appears.
14. False. You can choose whether or not you'd like to include page numbers in your table of contents.
15. B. With TC Entries, you can use several tables of contents with different information in the same document.
16. D. The keyboard shortcut to open a Mark Table of Contents Entry is <Alt> + <Shift> + <O>.
17. False. If the picture is moved in the document, the caption number updates automatically.
18. D. All of these options can be changed in a Table of Figures.
19. B. Index entries are invisible unless you click the Show/Hide button.
20. True. The Mark Entry button is located in the Index group of the References tab on the Ribbon

21. B. A reference note that appears at the bottom of a page is called a footnote.
22. A. The footnotes group is located on the References tab on the Ribbon.
23. False. A source can be cited repeatedly in a document and included in the bibliography.
24. True. You can choose to insert formatting and heading text or only insert the sources.

Working with Templates

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A template is like a mold. Once you define the properties of a template (text, macros, formatting properties, etc.) you can create new documents that have those same properties. In fact, every document you create in Word is based on a template. You will learn how to save time creating similar documents using this technique.

Using Exercise Files:

This chapter suggests exercises to practice the topic of each lesson. There are two ways you may follow along with the exercise files:

- Open the exercise file for a lesson, perform the lesson exercise, and close the exercise file.
- Open the exercise file for a lesson, perform the lesson exercise, and keep the file open to perform the remaining lesson exercises for the chapter.

The exercises are written so that you may “build upon them”, meaning the exercises in a chapter can be performed in succession from the first lesson to the last.

Creating a Document Template

A template is like a mold for Word documents; it contains formatting options and document properties that you can use again and again when creating new documents. In fact, every Word document is based on a template. There are so many templates available in Office that you will rarely need to create one of your own.

However, if you find yourself applying and creating the same properties, features, or content each time you create a new document, you can save yourself some time by using a template.

Templates can contain the following information:

Text	Tables and graphics	Formatting
Styles*	Macros*	Building Blocks
Toolbars*	Ribbon Tabs	Keystroke shortcuts

* Can be copied between documents and/or templates.

1. Create a new blank document. Or, open a document that you want to use as the template.

Remember that everything that appears in the document will appear in the template.

If you have added macros, building blocks, or styles, they are also included in the template.

2. Click the **FILE** tab and click **Save As**. Click the **Browse** button.

The Save As dialog box appears.

3. Click the **Save As Type** drop down and select **Word Templates (*.dotx)**.

The default location for templates is opened.

As long as templates are saved here, they will be easy to find in the New Document dialog box.

4. Click the **File name** text box and enter a name for the template.

The name should be something that is easily recognizable, that will be easy to identify later.

6. Click **Save** to save the template.

The dialog box closes and the template is saved under My Templates.

Tip:

- ✓ Word uses a document template file named **NORMAL.DOT** as its default template to create blank documents. You can make changes to the Normal template.

Exercise

- **Exercise File:** Formletter13-1.docx
- **Exercise:** Save Formletter13-1 as a template named “Testimonial Request”. Close the Testimonial Request template.

Click the Templates folder to save a template in the correct location.

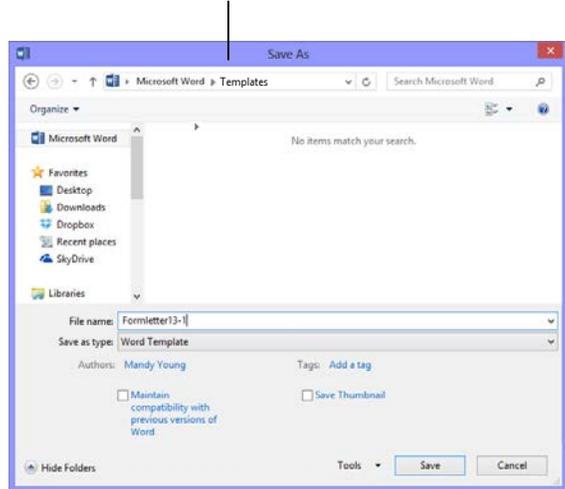


Figure 13-1: The Templates folder in the Save As dialog box.

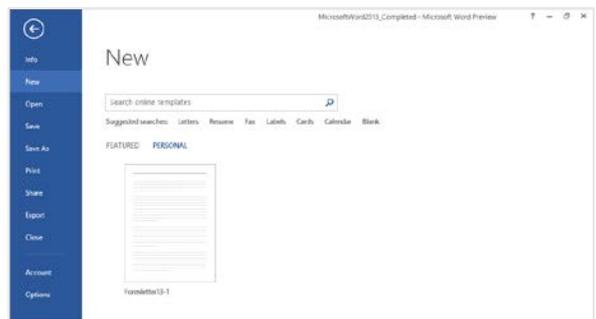


Figure 13-2: You can find your templates under Personal.

Using a Document Template

Once a template has been made, it is very easy to create a new document based on the template. The most difficult part is finding the template you want to use.

Word 2013 organizes your document templates so it's easier to find the one you want to use.

1. Click the **FILE** tab on the Ribbon and select **New**.

The New tab of Backstage view appears, displaying a list of available templates.

Table 13-1: Templates and Template Categories, to the right, explains the choices under Available Templates.

2. Click **PERSONAL** under the Search for online templates box.

Depending on the template or template category you choose, more templates or a dialog box appears.

✔ **Tip:** Personal templates appear in preview, the same way as the Featured ones.

3. Click a template option.

Your template opens.

Exercise

- **Exercise File:** Testimonial Request.dotx
- **Exercise:** Create a new document from the Testimonial Request template. Replace the placeholder text with your own information.

(NOTE: If you completed the Creating a Document Template lesson, the Testimonial Request.dotx template should be saved in the Templates folder. If it isn't, you'll need to do so before you can complete this exercise.)

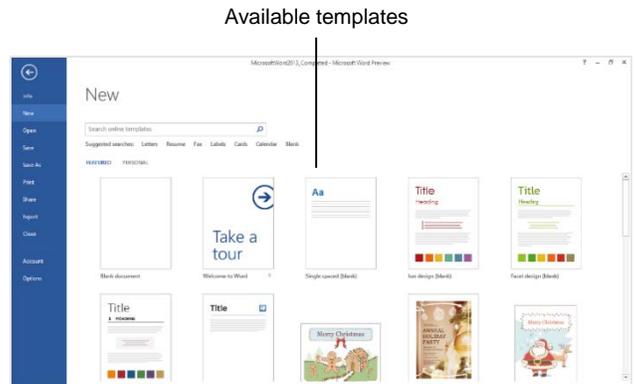


Figure 13-3: The New tab displays several template choices under Available Templates

Table 13-1: Templates and Template Categories

Blank document		Create a document from the default template.
Blog Post		Create a blog post from the default template.
Recent templates		Search recently used templates.
Sample templates	<input type="text" value="Search online templates"/>	Search Word's sample templates.
My Templates		Search all the templates you have created or downloaded from Office.com.
Office.com Templates		If you have an Internet connection, use Office.com to find and download new templates.

Creating Building Blocks

If you find yourself typing the same text again and again, or inserting the same types of tables or other objects, you could save a lot of time by using building blocks. Building blocks let you store the text and graphics you use frequently, such as a return address, company mission statement, or table design.

This lesson shows how to create building blocks from existing content and apply them to other documents.

1. Select the content you want to save as a building block.

The content can include almost anything: text, formatting, tables, and images.

 **Tip:** The content you use to create a building block will be placed in the new document as is, including lines, logos, hyperlinks, and more.

2. Click the **INSERT** tab on the Ribbon and click the **Quick Parts** button in the Text group.

The Quick Parts menu appears, displaying quick parts you can work with in your documents.

3. Select **Save Selection to Quick Part Gallery** from the list.

The Create New Building Block dialog box appears.

 **Other Ways to Create a Building Block:**
Press <Alt> + <F3>.

4. Click the **Name** text box and enter a name for the building block.

The name should be something that is easy to recognize later on.

 **Tip:** You can use the Gallery and Category controls to assign the building block to a specific gallery or category. Enter text in the “Description” text box to describe the building block.

5. Click the **Options** list arrow and select how you want the building block to be inserted.

By default the building blocks are inserted wherever the insertion point is located in the document. But you can also choose to insert the building block in its own paragraph or page.

6. Click **OK**.

The building block is created.

Exercise

- **Exercise File:** Agent Meeting13-3.docx
- **Exercise:** Create an “NST Logo” building block for North Shore Travel using the logo and North Shore Travel text at the top of the page.

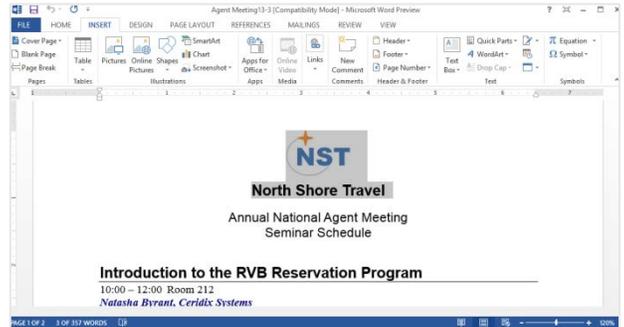


Figure 13-4: Select the content you want to make into a building block.

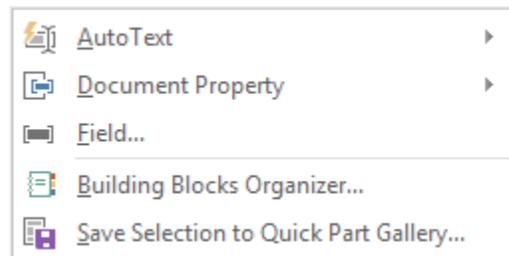


Figure 13-5: Create a building block by saving it to the Quick Part Gallery.

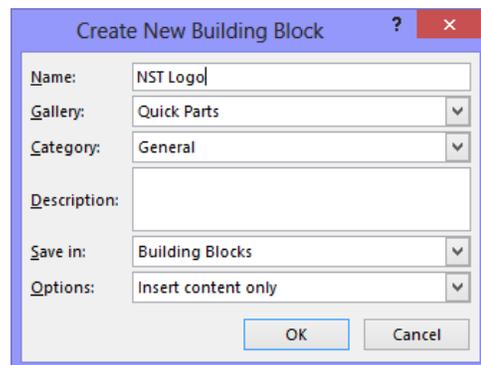


Figure 13-6: Name the building block so that it is easy to find. Use the other settings in this dialog box to specify how the building block will work in the document.

✔ **Tips:**

- ✔ By default, Word stores building blocks in a separate Building Blocks.dotx file, so that all building blocks are available in every document. However, you can save the building block in the current document or template by clicking the **Save in** list arrow and selecting the file in which you want to save the building block.
- ✔ You can also use building blocks to create and save headers, footers, watermarks, and much more!

Creating AutoText

If you've used previous versions of Word, you might have heard of a tool called AutoText. You can create AutoText for text and graphics you use frequently, such as a return address or canned paragraph. When you're ready to use the AutoText, all you need to do is type a few letters. Word 2013 reintroduces AutoText as a special kind of building block. If you understand how to create a building block, creating AutoText is easy!

1. Select the content you want to save as AutoText.
2. Click the **INSERT** tab on the Ribbon and click the **Quick Parts** button in the Text group.
The Quick Parts menu appears.
3. Select **AutoText** from the list.
The AutoText Gallery appears.
4. Select **Save Selection to AutoText Gallery** from the list.

The Create New Building Block dialog box appears.

Tip: AutoText is a special type of building block that is saved in the AutoText Gallery.

5. Click the **Name** text box and enter a name for the AutoText entry.
The name should be something unique that you can easily remember.
6. Click the **Options** list arrow and select how you want the AutoText to be inserted.

By default AutoText is inserted wherever the insertion point is located in the document. But you can also choose to insert the AutoText in its own paragraph or page.

7. Click **OK**.
The AutoText is created.

- Tip:**
- Word stores AutoText entries in template files (usually in the default NORMAL.DOTX), so that the AutoText entries are available in every document created from that template.

Exercise

- **Exercise File:** Agent Meeting13-4.docx.
- **Exercise:** Type the following information directly beneath the North Shore Travel building block and create an AutoText entry for it called "nsadd":

"502 Caribou Avenue
Duluth, MN 55261"

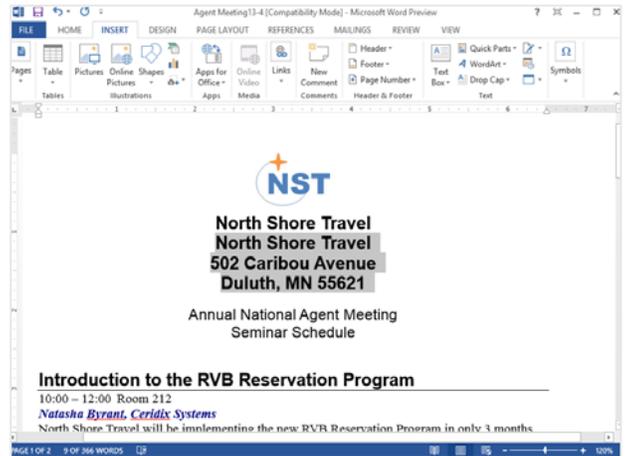


Figure 13-7: Select the content you want to make into AutoText.

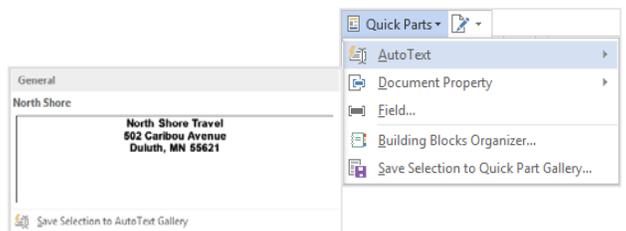


Figure 13-8: AutoText is saved to the AutoText Gallery.

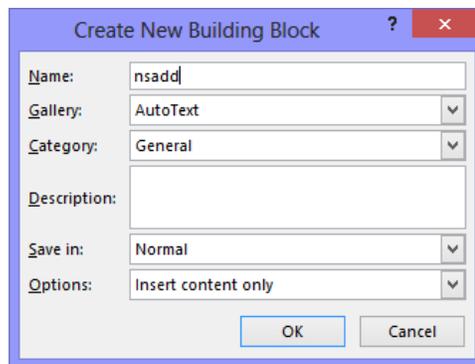


Figure 13-9: AutoText is saved to the AutoText Gallery in the Create New Building Block dialog box.

Using Building Blocks and AutoText

Once you have created building blocks and AutoText, the easy part is inserting these tools into your documents.

Insert a building block

Building blocks are easy to find, preview, and insert into your document.

1. Place your insertion point where you want to insert the building block.
2. Click the **INSERT** tab on the Ribbon and click the **Quick Parts** button in the Text group.

Any building blocks you have created appear in the Quick Parts list.

3. Select the building block you want to insert in the document.

The building block is inserted.

Other Ways to View and Insert Building Blocks:

Click the **INSERT** tab on the Ribbon and click the **Quick Parts** button in the Text group. Select **Building Blocks Organizer** from the list. You can preview, edit, delete, and insert building blocks from this dialog box.

Insert AutoText

AutoText is also easy to insert into a document.

1. Place your insertion point where you want to insert the AutoText.

2. Type the name of your AutoText.

A preview of the AutoText displays.

3. Press **<Enter>**.

The AutoText is inserted.

Other Ways to View and Insert AutoText:

Click the **INSERT** tab on the Ribbon and click the **Quick Parts** button in the Text group. Select **AutoText** from the list. Select the AutoText you wish to use.

Exercise

- **Exercise File:** Agent Meeting13-5.docx
- **Exercise:** Add the “NST Logo” building block to the end of the document. Add the nsadd AutoText to the end of the document.

(NOTE: If you did not complete the Creating Building Blocks and Creating AutoText lessons before this lesson, you’ll need to create the NST Logo building block and nsadd AutoText.)

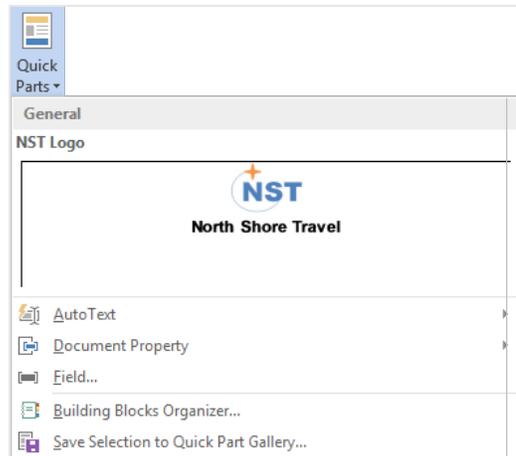


Figure 13-10: Select the building block you want to insert from the Quick Parts list.



Figure 13-11: When you type the name of an AutoText entry, a preview displays.

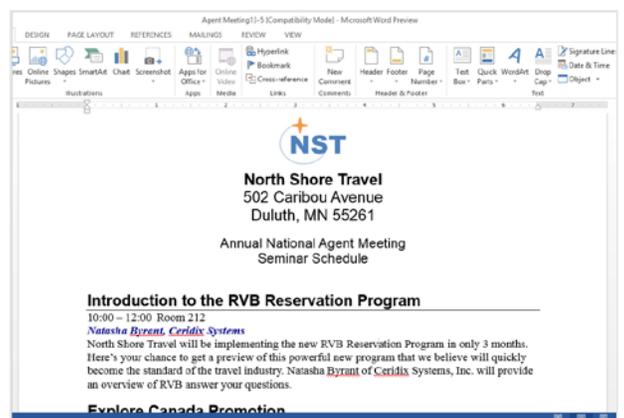


Figure 13-12: The building block and AutoText inserted in the document.

Attaching a Different Template to a Document

Unfortunately, customizations (styles, building blocks, macros, etc.) that you create in a template are only available in that template; they're not available in other templates. But you can work around this by attaching a template to a document. When you attach a template to a document, you use that template's styles, as well as its macros, building blocks, menus, toolbars, and shortcut keys.

This lesson explains how to attach a different template to a document, and how to update the current document's styles with the styles from the attached template.

1. Click the **FILE** tab and click **Options**.

The Word Options dialog box appears.

2. Click the **Add-Ins** tab.

The options for viewing and managing Microsoft Office add-ins appear.

3. Click the **Manage** list arrow and select **Templates**. Click **Go**.

The Templates tab of the Templates and Add-ins dialog box appears.

4. Click the **Attach** button.

The Attach Template dialog box appears. All your templates are normally stored in a special folder called Templates, located in the Microsoft Office folder. Word automatically opens this folder and displays only document templates when you click the Attach button.

Tip: If the template you want to attach is saved elsewhere, navigate to that location on the computer and select the template.

5. Select the template you want to attach to the document.

Now attach the template to the document.

6. Click the **Open** button.

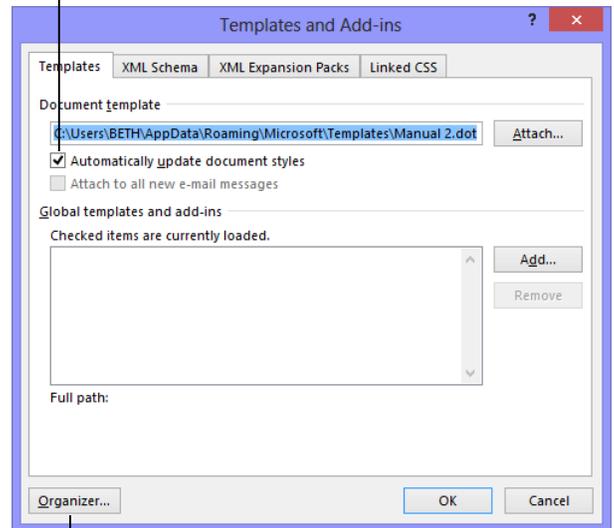
The file path of the template appears in the Attach text box.

If you want to use the styles in the attached template instead of the styles in the current document, you'll want to select the "Automatically update document styles" option.

Exercise

- **Exercise File:** Agenda.dotx and Agent Meeting13-6.docx
- **Exercise:** Attach the Agenda template to the Agent Meeting13-6 document. Automatically update styles from the template.

Check to overwrite the document's styles with the attached template's styles.



Opens the **Organizer**, where you can copy individual styles from one document or template to another.

Figure 13-13: The Templates tab of the Templates and Add-ins dialog box.

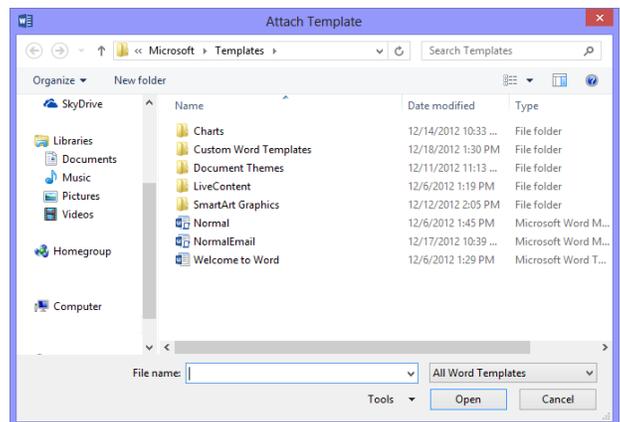


Figure 13-14: Select the template that contains the style(s) you want to copy to another document.

Working with Templates

- Click the **Automatically update document styles** check box.

This updates styles that have the same name between the template and the document. For example, if the document uses a style named “Command Text” and so does the template, the style in the document will be updated to appear as the style in the template.

- Click **OK**.

The Templates and Add-ins dialog box closes and the document is updated with the attached template.

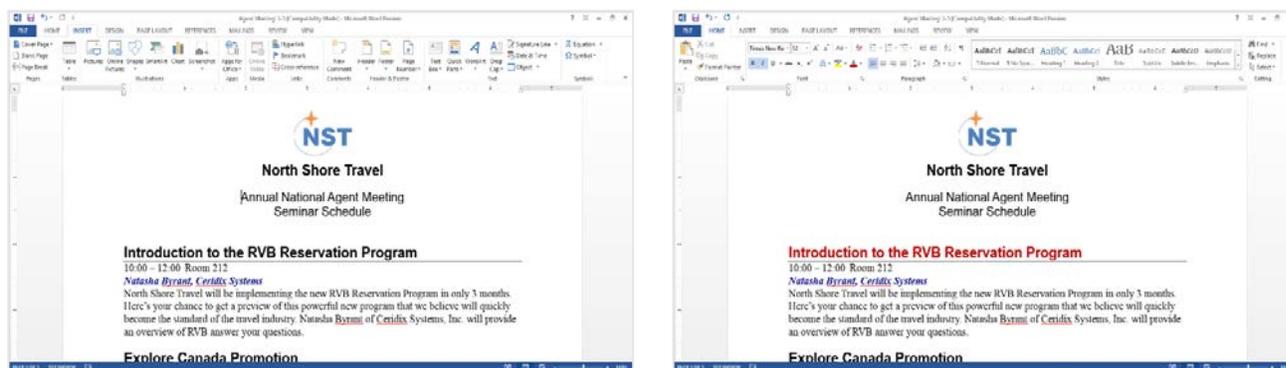


Figure 13-15: The document before and after the Agenda template is attached to it. Note the difference of style in the headings and subheadings.

Copying Styles between Documents and Templates

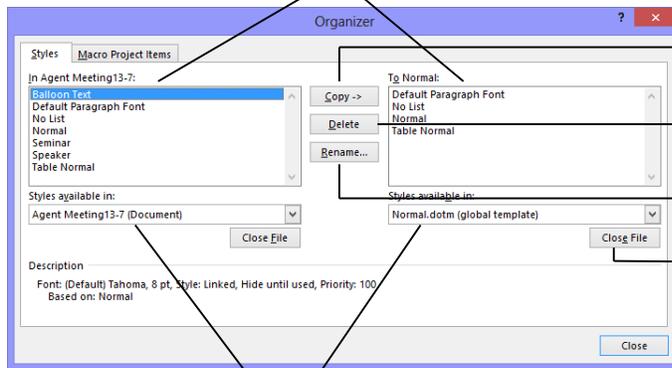
Attaching a different template to a document allows you to use all the template’s styles, macros, building blocks, menus, and shortcut keys in that document. Sometimes, however, you may only want to use a few styles from a template, and attaching a different template may be overkill.

This lesson explains how you can use the Organizer to copy styles between documents and templates (or between templates and templates).

1. Click the **FILE** tab and click the **Options** button.
The Word Options dialog box appears.
2. Click the **Add-Ins** tab.
The options for viewing and managing Microsoft Office add-ins appear.
3. Click the **Manage** list arrow and select **Templates**.
Click **Go**.
The Templates tab of the Templates and Add-ins dialog box appears.

4. Click the **Organizer** button.
The Styles tab of the Organizer dialog box appears.
The left side of the dialog box displays the name and styles of the current document. The right side of the dialog box displays the name and styles of the currently attached template. You must close the current document or template before you can open a different one.

Lists styles in the document or template. Select the style you want to copy, delete, or rename.



- Copies the selected style to the other document or template.
- Deletes the selected style.
- Renames the selected style.
- If the file you want is not open, click **Close File**, then click **Open File** and open the file you want.

Make sure the files you want to copy the styles between are listed in these boxes.

Figure 13-17: The Styles tab of the Organizer dialog box.

Exercise

- **Exercise File:** Agent Meeting13-7.docx and Agenda.dotx
- **Exercise:** Copy the “Seminar” style from the Agenda.dotx file into the Agent Meeting 13-7 document.

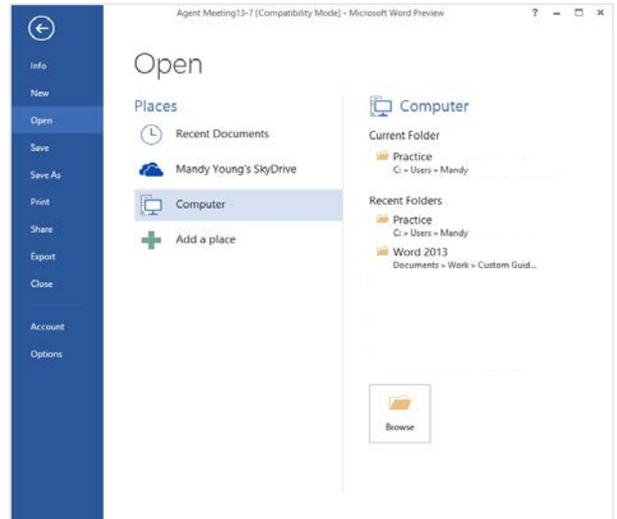


Figure 13-16: Select the template that contains the style(s) you want to copy into the document.

Working with Templates

6. Click the **Close File** button of the file whose styles you don't want to use.

Now you need to find the document or template that contains the style you want to copy.

7. Click the **Open File** button.

The Open dialog box appears.

8. Navigate to the document or template that contains the style(s) you want to copy and click **Open**.

The styles of the document or template appear in the right side of the Organizer dialog box.

9. Select the style(s) you want to copy and click the **Copy** button.

✔ **Tip:** Use the <Ctrl> and <Shift> keys to select multiple styles at a time.

Once the styles are copied, into the document or template, you can close the Organizer.

10. Click the **Close** button.

The Organizer dialog box closes and the styles are copied and updated in the document or template.



Figure 13-19: This dialog box appears if the style already exists in the document.

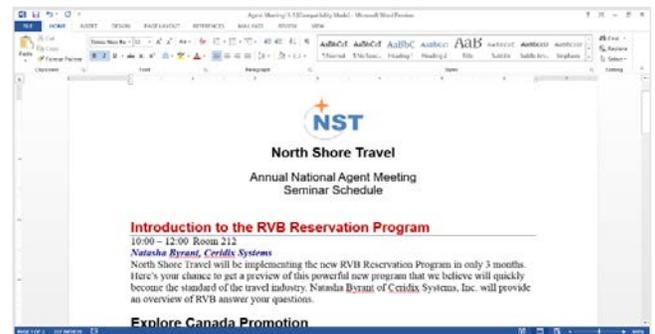
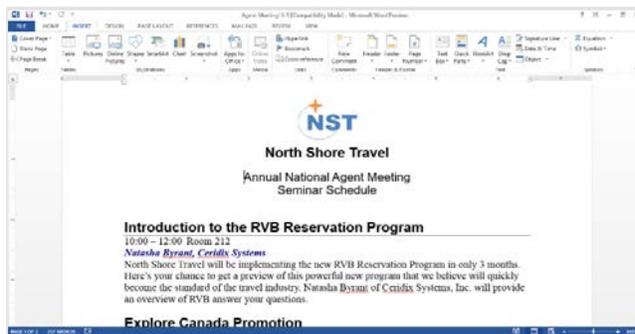


Figure 13-18: The document before and after the Seminar style is copied over. Note the difference of color in the headings that use the Seminar style.

Working with Templates Review

Quiz Questions

- 1.
2. A template does not contain information about:
 - A. Text Tables and graphics
 - B. Styles
 - C. Formatting
 - D. Word Count.
3. You cannot make changes to the default template NORMAL.DOT. (True or False?)
4. To work with one of Microsoft Word's pre-made templates, select:
 - A. My templates
 - B. Installed Templates
 - C. New from Existing
 - D. Blank and Recent
5. If you add a paragraph with an active hyperlink as a building block, the hyperlink will not be saved. (True or False?)
6. Building Blocks you create are available:
 - A. In the current document only.
 - B. Only in documents that use the current template.
 - C. Only in documents with a .docx extension.
 - D. In all Word Documents.
7. You can only include text in AutoText. (True or False?)
8. To put building blocks on the Quick Parts list:
 - A. Click the Insert tab on the Ribbon and click the Quick Parts button.
 - B. Click the References tab on the Ribbon and click the Building Block button.
 - C. Click the Page Layout tab on the Ribbon and click the Building Blocks Organizer button.
 - D. Click the Building Blocks tab on the Ribbon and click the Add to Quick Parts button.
9. Templates are usually stored in:
 - A. the Desktop.
 - B. a folder called Templates.
 - C. a folder called Customizations
 - D. the Favorites list .
10. When you attach a template to a document, you use that template's macros, and building blocks. (True or False?)

11. In order for the Organizer to work, all of the Styles on the left side of the Organizer dialog box must match the styles on the right side. (True or False?)

Quiz Answers

- 1.
2. D. Templates do not contain information about Word Count.
3. False. You can make changes to the default template NORMAL.DOT.
4. B. To work with one of Microsoft Word's pre-made templates, select Installed Templates in the New Document dialog box.
5. False. If you add a paragraph with an active hyperlink as a building block the hyperlink will be saved as is.
6. D. Building Blocks are available in all Word Documents.
7. False. You can create AutoText for text and graphics you use frequently.
8. A. To put building blocks on the Quick Parts list, click the Insert tab on the Ribbon and click the Quick Parts button.
9. B. Templates are usually stored in a folder called Templates.
10. True. When you attach a template to a document, you use that templates, styles, as well as its macros, building blocks, and shortcut keys.
11. False. You can choose any styles from one side of the Organizer dialog box and transfer them to the other.

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A form created in Word is very similar to the paper form you fill out with a pen or pencil. However, Word forms have several major advantages over the traditional paper type of forms. The greatest benefit of a Word form is that you can complete it in Word—saving you time, effort, and paper. You also don't have to worry about trying to read bad penmanship! Another advantage of a Word form is you can provide the user with information and prompts to help them complete the form.

Word forms can include fill-in-the blank fields and check box fields, just like their paper counterparts. In addition, you can include a list of options from which the user can choose to complete the form.

By now you're probably anxious to create and use your own online forms. Let's get started...

Using Exercise Files

This chapter suggests exercises to practice the topic of each lesson. There are two ways you may follow along with the exercise files:

- Open the exercise file for a lesson, perform the lesson exercise, and close the exercise file.
- Open the exercise file for a lesson, perform the lesson exercise, and keep the file open to perform the remaining lesson exercises for the chapter.

The exercises are written so that you may “build upon them”, meaning the exercises in a chapter can be performed in succession from the first lesson to the last.

Creating a New Form

When you create a form, you usually start by creating a template that contains the text on the form that doesn't change, that contains formatting, and that contains a table to line everything up neatly. By using a template as the basis for a form, users can fill out the form without changing the text or formatting of the form itself. Think of the template as a blank form when putting it together. Some of the tools you use when creating a form include:

- **Templates:** Forms are normally saved as templates so that they can be used again and again.
- **Content controls:** Content controls are the areas where users input information in a form. We'll learn more about content controls in upcoming lessons.
- **Tables:** Tables are often used in forms to align text and form fields, and to create borders and boxes.
- **Protection:** Forms are protected so that users can complete the form without changing the text and/or design of the form itself.

Once the form document looks the way you want it to, you are ready to insert form controls.

Display the DEVELOPER tab on the Ribbon

The DEVELOPER tab must be displayed on the Ribbon in order to access and insert the form controls.

1. Click the **FILE** tab on the Ribbon and select **Options**.
The Word Options dialog box appears.
2. Click the **Customize Ribbon** tab.
A list of tabs appear on the right side of the Customize Ribbon tab.
3. Select the **Developer** check box under Customize the Ribbon and click **OK**.
The Word Options dialog box closes and the DEVELOPER tab is displayed on the Ribbon.

Exercise

- **Exercise File:** Form15-1.docx
- **Exercise:** Open the DEVELOPER tab on the Ribbon.

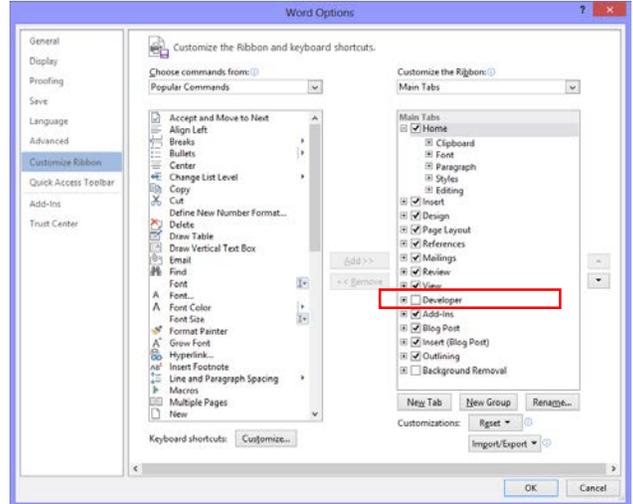


Figure 14-1: Add the Developer tab to the Ribbon from the Word Options dialog box.

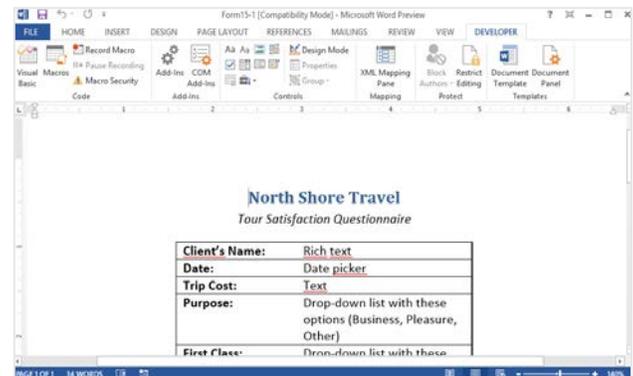


Figure 14-2: The Developer tab of the Ribbon.

Adding Content Controls

Once you have created the form document, you can start inserting the content controls the user needs to fill out.

Tip:

✓ If content controls are not available, you may have opened a document created in an earlier version of Word. To use content controls, you must convert the document to Word 2013 format.

1. Place your insertion point where you want to insert a form content control.

2. Click the **DEVELOPER** tab on the Ribbon.

The Controls group is where the content controls you can insert in the form are located.

3. Click the content control you want to use in the Controls group.

Table 14-1: Form Content Controls describes each of the content controls you can insert in the form.

Group content controls

You can group content controls to make them easier to work with.

1. Once you've inserted the controls you need you're your document, select the ones you want to group.

2. Click the **Group** button in the Controls group.

3. Select **Group** from the list.

Set content control properties

You can change the properties for a content control after it is inserted; do this to change the options available under a drop-down list, for example:

1. Select the content control you want to change and click **Properties** in the Controls group.

The Properties dialog box appears.

2. Change the content control's properties as necessary.

3. Click **OK**.

Exercise

- **Exercise File:** Form14-2.docx
- **Exercise:** Insert content controls in the form. (Replace the text in the right column of the table with the correct content control, as indicated in the image below.)

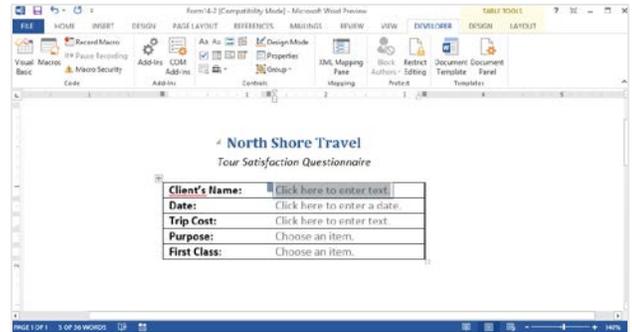


Figure 14-3: The form with content controls filled in.

Table 14-1: Form Content Controls

 Rich Text	Formatting can be saved by loading, saving, or closing the document. Use this control for a short paragraph.
 Text	This is limited to a plain text paragraph, so no formatting can be included.
 Picture Content Control	Fills the content control with a single picture.
 Building Block Gallery	Shows a gallery of formatted design choices you can add to the content control. Specify the building blocks you want to make available from the Quick Parts gallery.
 Combo Box	Contains a list that you can edit directly. Formatting can be saved by saving or closing the document.
 Drop-Down List	Choose from several predetermined selections that appear upon clicking the list arrow.
 Date Picker	Use this to help users enter a date. The content control allows you to control the format and appearance of the date.
 Check Box	Insert a check box into a form.
 Legacy Tools	If you prefer the form controls from previous versions of Word, they are available here.

Assigning Help to Form Content Controls

Help out the people who fill out the forms you create by adding instructional text to the content controls. Instructional text already appears when the content controls are inserted, such as “Choose an item,” or “Click here to enter text.”

You can enter instructional text that is more specific to your form, such as “Click here to enter your first name.”

1. Click the **DEVELOPER** tab on the Ribbon and click the **Design Mode** button in the Controls group.
The form content controls change so that they are editable.
2. Click the content control that you want to add instructional text to.
3. Edit and format the placeholder text as you wish.
Once you’re done editing the placeholder text for content controls, turn off Design Mode.
4. Click the **Design Mode** button in the Controls group.
The content controls are edited with instructional text.

Make a content control disappear

You can make a content control disappear when someone enters their own content in a Rich Text control or Text control.

1. Click the **DEVELOPER** tab on the Ribbon and click the **Design Mode** button in the Controls group.
The form content controls become editable.
2. Click the **Rich Text** or **Text** content control.
3. Click the **Properties** button in the Controls group.
The Content Control Properties dialog box for the control appears.
4. Click the **Remove content control when contents are edited** check box.
5. Click **OK**.
6. Click the **Design Mode** button in the Controls group.

Exercise

- **Exercise File:** Form14-3.docx
- **Exercise:** Change the placeholder text in the Client’s Name control to, “Enter your name: Last, First”

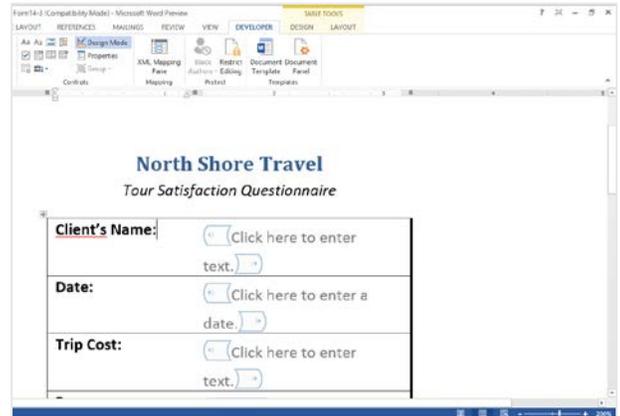
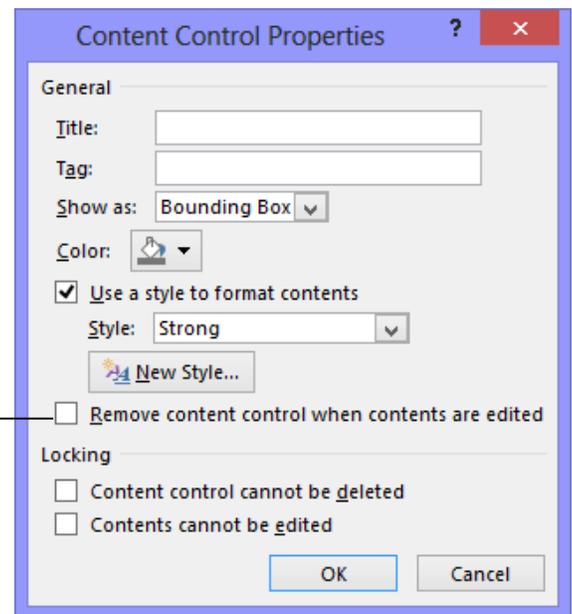


Figure 14-4: Design Mode allows you to change the instructional (placeholder) text of content controls.



Select this check box to make the content control disappear when it is edited.

Figure 14-5: The Content Control Properties dialog box for a Rich Text content control.

Preparing the Form for Distribution

You need to protect a form before distributing it so that the content controls cannot be removed or edited when users fill out the form.

Protect the entire form

If you are asking people to fill out a form, in most cases you will want people to fill out the entire form.

1. Open the form.

Make sure the form and its content controls appear the way you want users to see it before filling out the form.

2. Click the **DEVELOPER** tab on the Ribbon and click the **Restrict Editing** button in the Protect group.

The Restrict Formatting and Editing task pane appears.

3. Click the **Allow only this type of editing in the document** check box in the Restrict Formatting and Editing task pane.

Specify the type of editing to be allowed in the editing restrictions list.

4. Click the **Editing restrictions** list arrow and select **Filling in forms** from the list.

If that is all the protection you need, you are ready to start protecting the document.

5. Click the **Yes, Start Enforcing Protection** button.

The Start Enforcing Protection dialog box appears. It's a good idea to enter a password so that users can't change the editing restrictions.

6. Click the **Enter new password (optional)** text box and enter a password.

7. Click the **Reenter password to confirm** text box and enter the password again.

8. Click **OK**.

The document is protected, and the protection level is shown in the Restrict Formatting and Editing task pane.

Exercise

- **Exercise File:** Form14-4.docx
- **Exercise:** Protect the form so it is ready to be distributed.

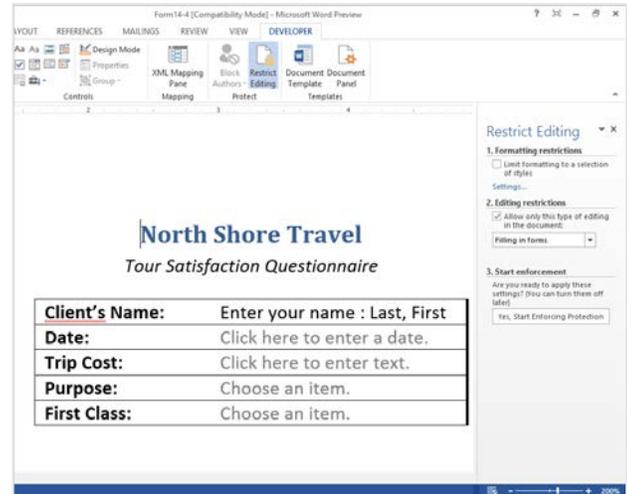


Figure 14-6: Protecting the form for distribution.

Protect parts of the form

Protect only parts of the form if you want people to be able to edit the document beyond the form content controls.

1. Open the form.

Make sure the form and its content controls appear the way you want users to see it before filling out the form.

2. Select the content control or the content control group you want to protect.

If content controls are grouped, you can change their protection properties all together.

3. Click the **DEVELOPER** tab on the Ribbon and click the **Properties** button in the Controls group.

There are two locking options you can use to protect a content control:

Content control cannot be deleted: This allows editing of the content control, however it cannot be deleted.

Contents cannot be edited: This allows deleting on the content control, but it cannot be edited.

4. Select one or both of the locking options in the dialog box and click **OK**.

The form is protected accordingly.

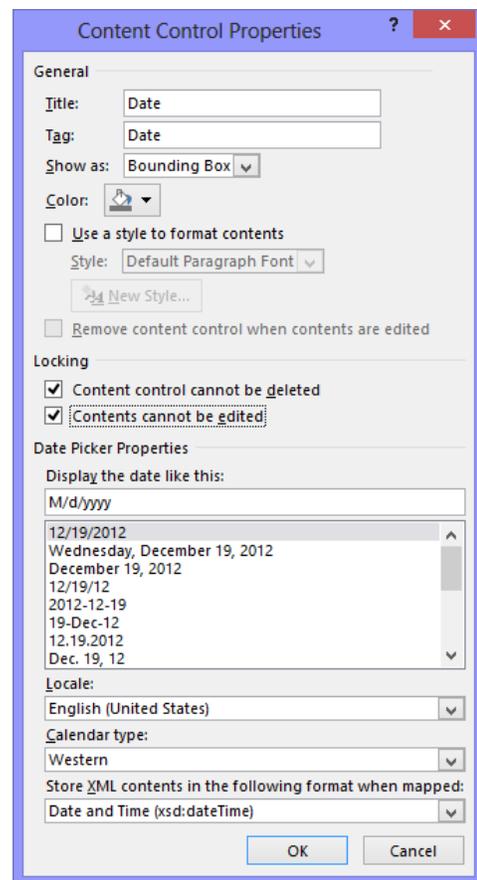


Figure 14-7: The Content Control Properties dialog box.

Filling Out a Form

Fill out a form once you've completed creating it to make sure it's working correctly.

Also, if you receive a form from someone, here's how to fill it out.

1. Click a **content control** to begin working with it.

Content controls should have some instructive text on or near them to help you understand how to fill out the content control.

2. Select an option from the content control or enter text as directed.

The document around the content controls should also be able to help you with controlling these options.

3. Save the form when you are finished filling it out.

Your changes to the form are saved and ready to be tabulated.

Exercise

- **Exercise File:** Form14-5.docx
- **Exercise:** Fill out the form using your own information, or the information shown in the image below.

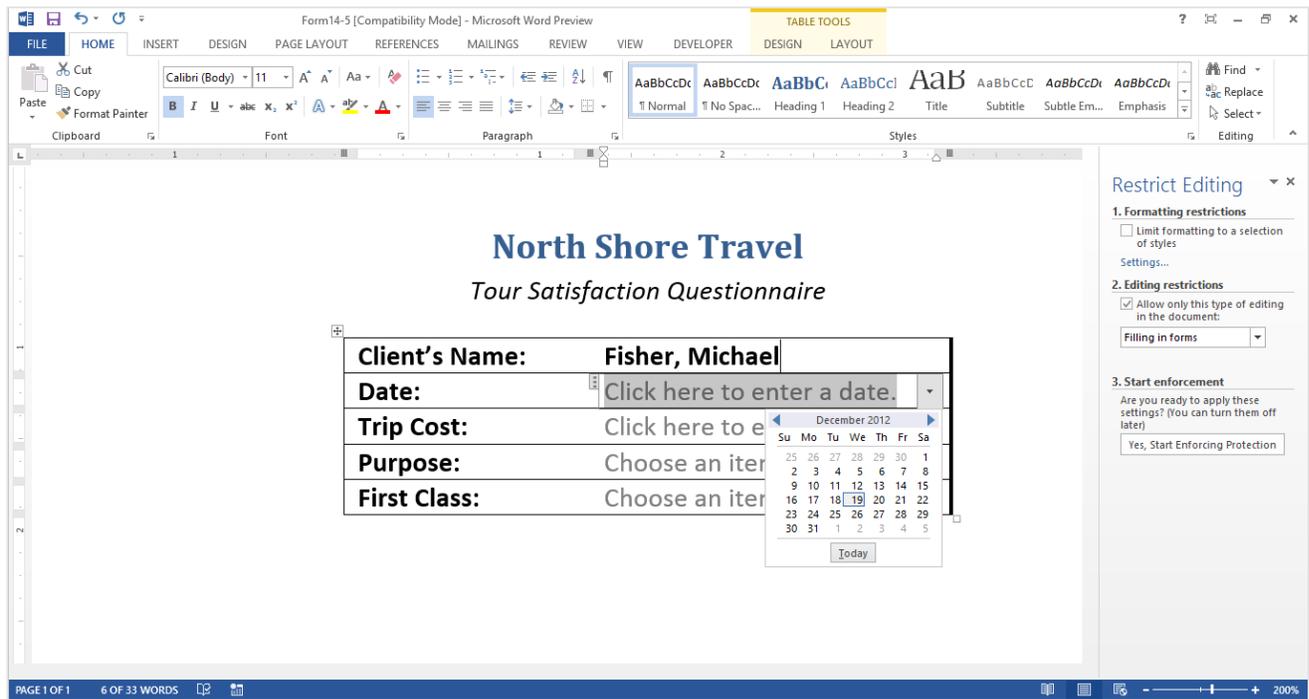


Figure 14-8: Choose an option from the date picker to proceed.

Working with Forms Review

Quiz Questions

- 1.
2. The areas where users input information in a form are called:
 - A. Input Centers
 - B. Developer Tabs
 - C. Templates
 - D. Content Controls
3. The Controls group is located in:
 - A. The References tab on the Ribbon.
 - B. The Developer tab on the Ribbon.
 - C. The Review tab on the Ribbon.
 - D. The View tab on the Ribbon.
4. When you click the Developer tab on the Ribbon and click the Design Mode button:
 - A. The form content controls change so that they are editable.
 - B. The form content controls are changed to pre-selected alternate text.
 - C. All placeholder text disappears.
 - D. The form content controls are locked so that they cannot be changed.
5. Why would you protect a form before distributing it?
 - A. To prevent the form from viruses.
 - B. To prevent the form from receiving junk e-mail.
 - C. To prevent the content controls from being removed or edited by users.
 - D. To prevent people from stealing your information.
6. You can allow content controls to be edited while still preventing it from being deleted.(True or False?)
7. To begin working with a content control, just click it. (True or False?)

Quiz Answers

- 1.
2. D. The areas where users input information in a form are called content controls.
3. B. The Controls group is located in the Developer tab on the Ribbon.
4. A. When you click the Developer tab on the Ribbon and click the Design Mode button, the form content controls change so that they are editable.

5. C. You need to protect a form before distributing it so that the content controls cannot be removed or edited when users fill out the form.
6. True. You can allow content controls to be edited while still preventing it from being deleted
7. True. To begin working with a content control, just click it.

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Customization is a great asset in an application. Customization lets you use a particular mix of commands and shortcuts that are best for your working style.

The lessons in this chapter focus on how to customize the Ribbon, the Quick Access Toolbar, and AutoCorrect. We'll also discuss how to access and review the default options for a program.

Customizing the Ribbon

One of the most useful features in Office 2013 is that you can customize the Ribbon. Add your own tabs and groups, or rearrange the Ribbon to better fit your work style.

Create a new tab or group

You can add new groups to tabs, or you can create new tabs with new groups.

1. Click the **FILE** tab on the Ribbon and select **Options**.

The Options dialog box appears.

2. Click the **Customize Ribbon** tab.

The left column displays commands that you can add to the Ribbon.

The right column displays the tabs on the Ribbon, and the groups and commands in each tab.

Tip: Click the plus sign next to a tab or group to expand it.

3. In the right column, select the tab where you wish to add the new tab or group.

A new tab, which automatically includes a new group, will be inserted below the selected tab.

A new group will be inserted within the selected tab.

4. Click the **New Tab** or the **New Group** button.

The new tab or group is added.

Rename a tab or group

Once you've created a tab or group, give it a name.

1. Select the tab or group you want to rename.

2. Click the **Rename** button.

The Rename dialog box appears.

3. Enter a name for the selected tab or group in the Display Name text box.

The tab or group is renamed. For a group, also select a symbol to represent the group.

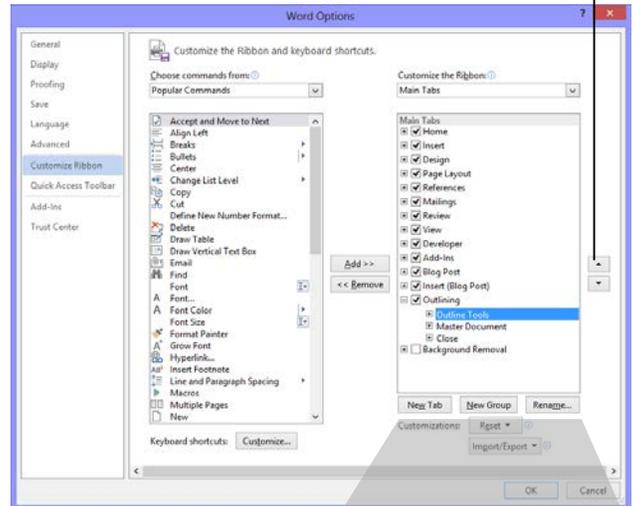
4. Click **OK**.

The tab or group is renamed.

Exercise

- **Exercise File:** None required.
- **Exercise:** Create a new group on the HOME tab called "Printing" and include the command to Print Preview and Print. Restore the Ribbon defaults.

Click to reorder the selected tab or group.



Click to create a new tab.

Click to create a new group.

Click to rename the selected tab or group.

Figure 15-1: Use the buttons in the Options dialog box to add a new tab or group to the Ribbon.

Add a command to a group

Once you have created a new tab or group, you can add commands to the group. You can also add commands to groups that already appear on the Ribbon.

1. In the right column, select the group to which you want to add a command.

This could be a group you've created from scratch, or even a group that appears by default.

2. In the left column, select the command you want to add to the Ribbon. Click the **Add** button.

The command is added to the group.

- ✓ **Tip:** Not finding the command you want to add? Click the **Choose commands from** list arrow and select the group of commands you want to view.

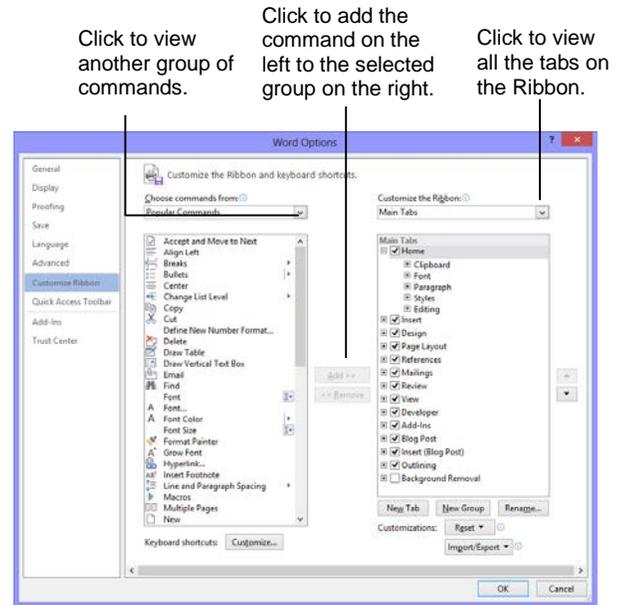


Figure 15-2: Adding commands to groups on the Ribbon.

Restore the default Ribbon

If you no longer want to use the customizations you've added to the Ribbon, you can restore the Ribbon to its original, default settings.

1. Click the **Reset** button.

Two options appear:

- **Reset only selected Ribbon tab:** Restores the default settings for the selected tab.
- **Reset all customization:** Removes all Ribbon and Quick Access Toolbar customizations, restoring them to the default arrangement and appearance.

2. Select the reset option you wish to use.

The Ribbon is restored to its default settings.

Remove a tab or group

You can also remove a specific tab or group from the Ribbon.

1. In the right column, right-click the tab or group you wish to use.

2. Select **Remove**.

The tab or group is removed from the Ribbon.

✓ Tips:

- ✓ Any changes you make to a program's Ribbon will appear only in that program.
- ✓ To hide a tab on the Ribbon, deselect its check box.

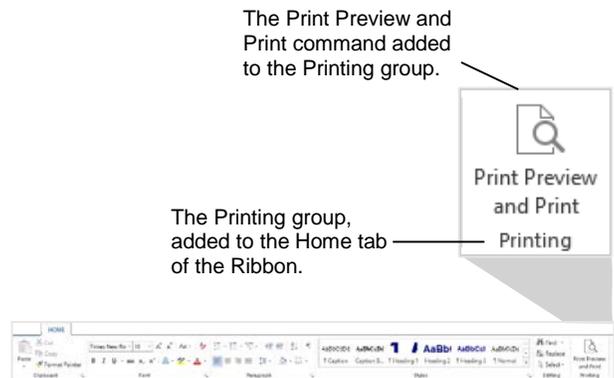


Figure 15-3: The HOME tab of the Ribbon, customized with a new group.

Customizing the Quick Access Toolbar

The Quick Access Toolbar is a shortcut for commands that are used often. If the Quick Access Toolbar doesn't contain enough of your frequently used commands, you can customize it by adding or deleting commands.

1. Click the **FILE** tab and select **Options**.

The Word Options dialog box appears.

2. Click the **Quick Access Toolbar** tab.

This tab displays options for customizing the Quick Access Toolbar.

The left column displays commands you can add to the Quick Access Toolbar. The right column displays commands that appear there.

3. In the left column, select the command you want to add to the Quick Access Toolbar.

4. Click the **Add** button.

The command is added to the Quick Access Toolbar.

✓ Tips:

- ✓ Arrange the order in which the commands are displayed by clicking the **Move Up** and **Move Down** buttons to the right of the column.
- ✓ Click the **Reset** button and select **Reset only Quick Access Toolbar** to return the Quick Access Toolbar to its default commands.
- ✓ Select a command in the Quick Access Toolbar column and click the **Remove** button to remove it from the Quick Access Toolbar.

Exercise

- **Exercise File:** None required.
- **Exercise:** Add the Print Preview command from the Popular Commands group to the Quick Access Toolbar. Move the Quick Access Toolbar below the Ribbon.

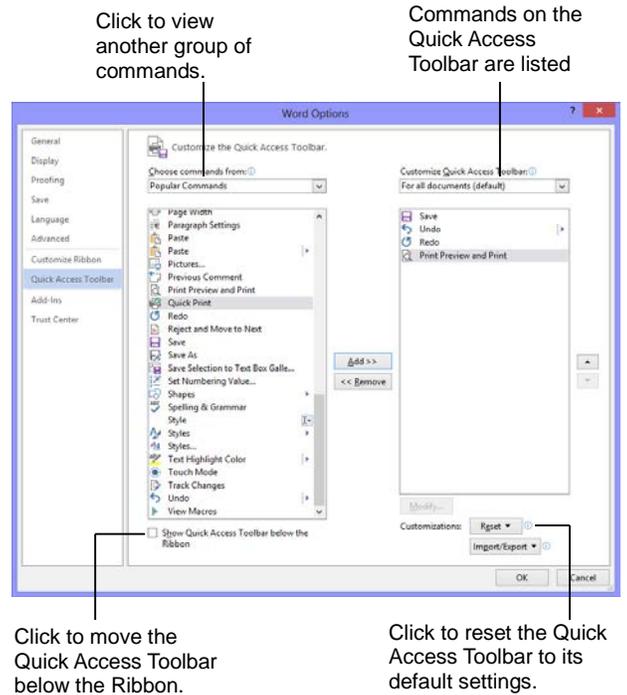


Figure 15-4: Adding a command to the Quick Access Toolbar.

Using and Customizing AutoCorrect

AutoCorrect automatically corrects many common typing and spelling errors as you type. It is also a great way to use shorthand for longer words, phrases, or symbols.

AutoCorrect is a feature that is shared across the Microsoft Office suite—so any additions or changes you make to AutoCorrect in one program, such as Word, will appear in all Microsoft Office programs, like Excel, PowerPoint, and Outlook.

How AutoCorrect works

You may have already noticed that sometimes your typos are corrected as you enter text in Word. When you type an AutoCorrect entry and then press the <Spacebar>, AutoCorrect replaces that text with the correct text. For example, AutoCorrect will change the mistyped words “hte” to “the”, or “adn” to “and”. AutoCorrect also corrects simple grammar mistakes, such as capitalization problems. For example, it would change “GOing” to “Going,” or capitalize the first letter in sentences.

Create an AutoCorrect entry

Word already has many entries in AutoCorrect, but you can add your own entries to correct habitual misspellings, quickly insert a symbol, or insert a shorthand version of a long phrase that you frequently use.

1. Click the **FILE** tab and select **Options**.

The Word Options dialog box appears.

2. Click the **Proofing** tab.

This tab displays options for how Word corrects and formats text.

3. Click the **AutoCorrect Options** button.

The AutoCorrect dialog box appears with the AutoCorrect tab in front.

4. Type the word or phrase you want to correct or use as shorthand in the **Replace** text box.

This is the text that AutoCorrect will recognize when you type.

5. Type the word or phrase you want to appear in the **With** text box.

When the text in the “Replace” text box is typed with a space, the text in the “With” text box will appear.

Exercise

- **Exercise File:** None required.
 - **Exercise:** Create an AutoCorrect entry that replaces “ot” with “to”.
- Try the AutoCorrect entry with this phrase, “He was going ot the store.”

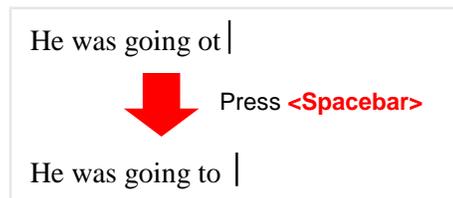


Figure 15-5: An example of how AutoCorrect works.

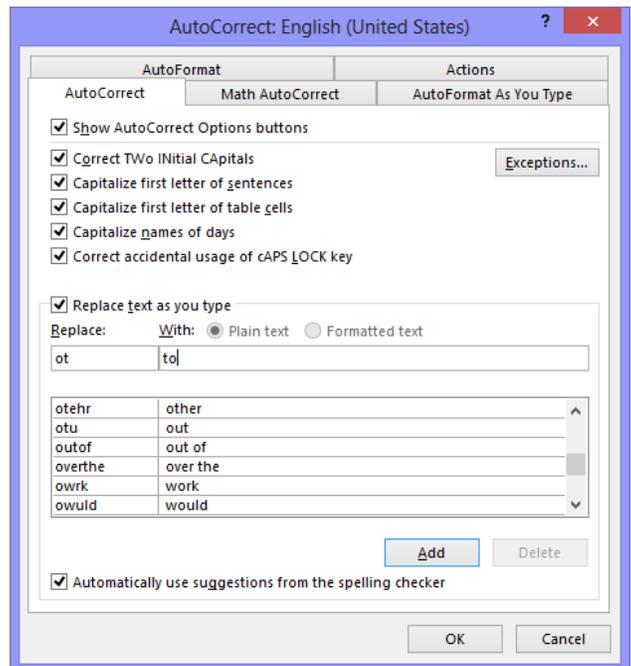


Figure 15-6: The AutoCorrect tab of the AutoCorrect dialog box.

6. Click **Add**.

The entry is added to the AutoCorrect list.

7. Click **OK** to close the AutoCorrect dialog box. Click **OK** to close the Word Options dialog box.

The dialog boxes close and the entry will now be available in all Word documents, and also in all other Office applications.

Changing Word’s Default Options

Microsoft spent a lot of time and research when it decided what the default settings for Word should be. However, you may find that the default settings don’t always fit your own needs.

This lesson isn’t so much an exercise as it is a reference on how to customize Word by changing its default settings.

1. Click the **FILE** tab and select **Options**.

The Word Options dialog box appears.

2. Click the tabs on the left to view different option categories.

See **Table 15-1: Tabs in the Word Options Dialog Box**, for more information on these categories.

3. Change the options as you see fit. Click **OK** to confirm the changes.

The changes are applied to the Word program.

Exercise

- **Exercise File:** None required.
- **Exercise:** Explore the tabs in the Word Options dialog box.

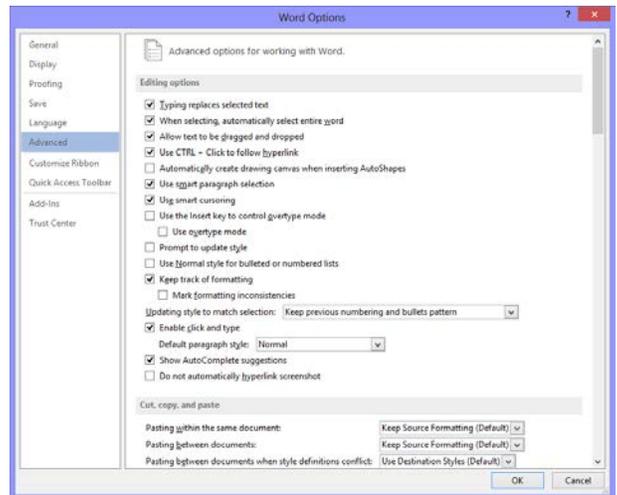


Figure 15-7: The Advanced tab of the Word Options dialog box.

Table 15-1: Tabs in the Word Options Dialog Box

General	Change the most commonly modified options in Word. This includes enabling the Mini Toolbar and Live Preview. Also, change the color scheme, control ScreenTips, and change the user name.
Display	Change how content is displayed on the screen and when printed. Change screen display options such as showing white space between pages in Print Layout view and choose which formatting marks you always want to display on the screen, such as tab characters and paragraphs. Set printing options, such as updating fields before printing and printing hidden text.
Proofing	Change how Word corrects and formats your text. Change the types of errors that Word flags when looking for spelling and grammar errors.
Save	Customize how documents are saved, such as how often AutoRecover saves a document, and change default file locations.
Language	Add additional languages to edit your documents. Also set the language priority order for added languages.
Advanced	Advanced options for working with Word. Change how Word works when you edit text; modify how cut, copy, and paste commands operate; customize tools in the window, such as how it displays screen tips and scroll bars; control how the document is printed; and choose advanced save options.
Customize Ribbon	Create custom tabs and groups for the Ribbon.
Quick Access Toolbar	Add commands to the Quick Access Toolbar.
Add-Ins	View and manage Microsoft Office add-ins, such as Acrobat PDFMaker and custom XML data.
Trust Center	Help keep your document safe and your computer secure and healthy. Read privacy statements and change Trust Center Settings to control how Word works with macros, add-ins, the message bar, trusted publishers and locations, and more.

Customizing Word Review

Quiz Questions

- 1.
2. You can only add custom groups to custom tabs. (True or False?)
3. What is the purpose of the Quick Access Toolbar?
 - A. To provide quick access to the commands you use most frequently.
 - B. To make Word 2013 look more like previous versions.
 - C. To provide Microsoft Access commands in the Word program.
 - D. To provide a backup in case the Ribbon fails
4. AutoCorrect changes:
 - A. Spelling errors
 - B. Grammar errors
 - C. Capitalization errors
 - D. All of these.
5. AutoCorrect entries created in Word will not appear in any other programs. (True or False?)
6. Which of the following is NOT a tab in the Word Options dialog box?
 - A. Proofing, which changes how Word corrects your text.
 - B. Graphics, which lets you set default properties for graphic files.
 - C. General, which lists the most commonly modified options in Word
 - D. Trust Center, which changes your privacy options.

Quiz Answers

- 1.
2. False. You can add custom groups to default tabs or to custom tabs.
3. A. The purpose of the Quick Access Toolbar is to provide quick access to the commands you use most frequently.
4. D. AutoCorrect changes spelling errors, grammar errors, and capitalization errors.
5. False. AutoCorrect entries created in Word will appear in all other Microsoft Office programs.
6. B. There is no Graphics tab in the Word Options dialog box.

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This chapter explains how to tailor Word to work the way you do. In this chapter, you will get to customize many of Word's settings through Word Options.

First, learn how to customize the Quick Access Toolbar and work with AutoCorrect. Add the commands you use most often so they are readily available on the Quick Access Toolbar above the Ribbon. AutoCorrect is the feature that instantly corrects common spelling and typing errors, such as changing "teh" to "the."

You'll also learn more about how to customize word by changing its default options, viewing document properties, finding a document on your computer, recovering documents when Word crashes, and repairing Word when it does not work properly.

The last topic covered by this chapter is macros. A macro helps you perform routine tasks by automating them. Instead of manually performing a series of time-consuming, repetitive actions in Word, you can record a single macro that does the entire task, all at once.

Converting an Older Document to Word 2013

Word 2013 can work with Word documents created in earlier versions of Word, thanks to its Compatibility Mode. When an early version of a Word document is opened in Word 2013, Compatibility Mode is automatically turned on. This ensures that only features that are compatible with earlier versions are available, so people still using early versions of Word will still have full editing capabilities.

Tip:

- ✓ When you convert a file, the original file is overwritten. If you ever intend on using the original file again, save a copy of it in its original file format before converting.

1. In Word 2013, open the document that you want to convert.

Converting the file to Word 2013 .docx format will make many new features available in the file.

2. Click the **FILE** tab on the Ribbon.
Click the **Info** tab.

3. Click the **Convert** button.
The Microsoft Office Word dialog box appears, asking you to confirm that you want to convert the document.

Tips:

- ✓ The Convert option only appears when Word is in Compatibility Mode.
- ✓ Select the **Do not ask me again about converting documents** check box if you don't want to see this dialog box in the future when converting documents.

4. Click **OK**.
The document is converted, and Compatibility Mode is no longer on.

Exercise

- **Exercise File:** Old document.doc
- **Exercise:** Convert the old document to 2013 format.

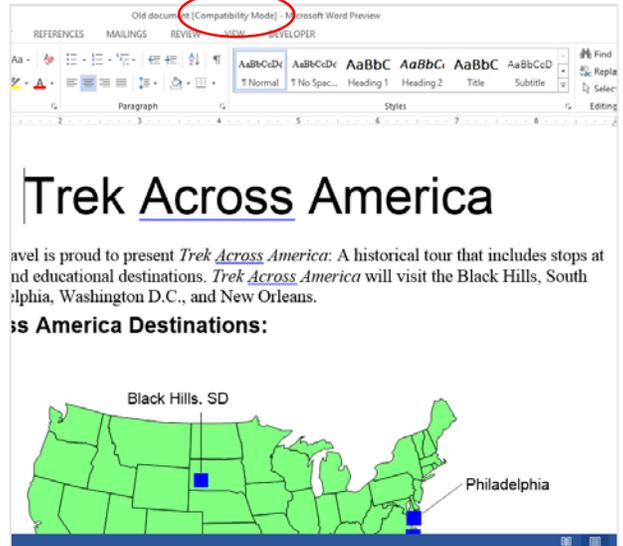


Figure 16-1: When a document created in an earlier version of Word is opened in Word 2013, it is opened in Compatibility Mode. To enable all features of Word, you'll need to convert it to Word 2013 format.

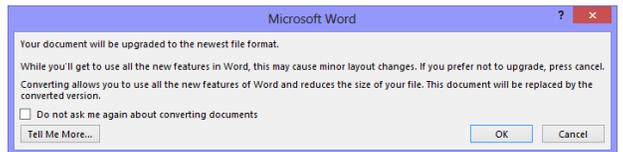


Figure 16-2: This dialog box appears when a document is being converted.

Translating Text

Translating a document into a different language can be a difficult task. Word includes several translation tools to make it easier.

Select a translation language

Before you start translating a document, select the language into which you want to translate it.

1. Click the **REVIEW** tab on the Ribbon and click the **Translate** button in the Language group.

A contextual list of options appears.

2. Select **Choose Translation Language** from the list.

The Translation Language Options dialog box appears. You can select the language that the Mini Translator should use or the language you want to use to translate an entire document.

3. Select the language you want to use and click **OK**.

You are ready to translate your document into the language you selected.

Translate an entire document

If you have an Internet connection, you can use Microsoft's online translation service to translate an entire document.

1. Click the **REVIEW** tab on the Ribbon and click the **Translate** button in the Language group.

A list of options appears.

2. Select **Translate Document**.

The Translate Whole Document dialog box appears. Confirm that you want to translate the entire document.

3. Click **Send**.

Your Web browser appears, displaying the translated document.

Translate selected text

If you only need to translate a few words or a short phrase, you can use Word's Research pane.

Exercise

- **Exercise File:** Description15-2.docx
- **Exercise:** Select the translation language as French. Translate a single word in the document into French.

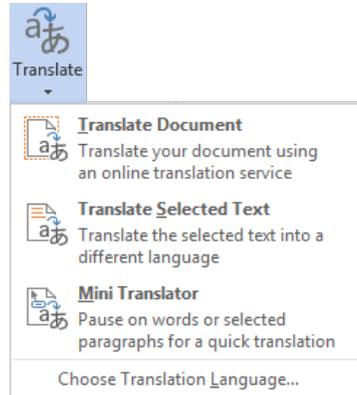


Figure 16-3: The Translate button.

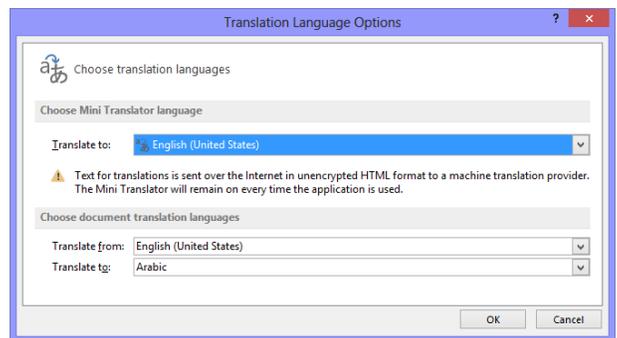


Figure 16-4: Select your languages in the Translation Language Options dialog box.

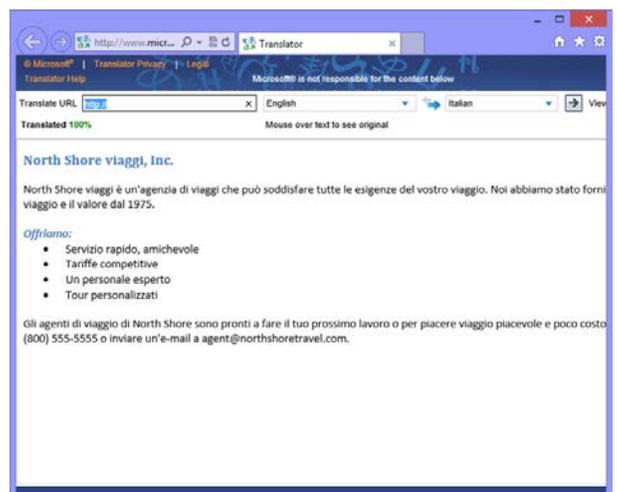


Figure 16-5: A document translated into another language.

More Topics

1. Select the text you wish to translate.
The text is highlighted blue.
 2. Click the **REVIEW** tab on the Ribbon and click the **Translate** button in the Language group.
A list of options appears.
 3. Select **Translate Selected Text** from the list.
The Research pane appears, displaying your text beneath the Translation heading.
- ✓ You can change the languages Word translates from and to by clicking the **From** and **To** list arrows in the Research pane.

Translate a single word

The Mini Translator lets you translate a single word by pointing to it with your mouse.

1. Click the **REVIEW** tab on the Ribbon and click the **Translate** button in the Language group.
A list of options appears.
 2. Select **Mini Translator** from the list.
You are now ready to use the Mini Translator.
 3. Point to the word you wish to translate.
The Mini Translator displays the translation.
- ✓ **Tips:**
- ✓ Click the **Play** button in the Mini Translator to listen to the word's pronunciation.
 - ✓ Word's translation software is not perfect. No matter which translation tool you use, always proofread your document carefully for any mistakes.

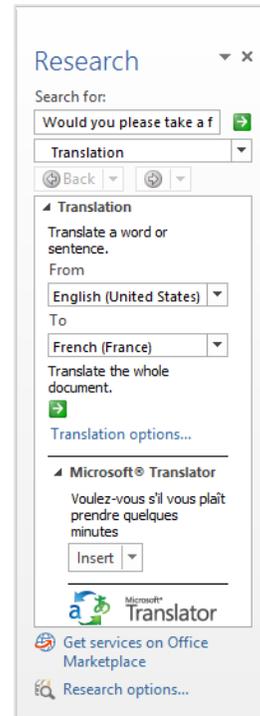


Figure 16-6: The Research Pane.

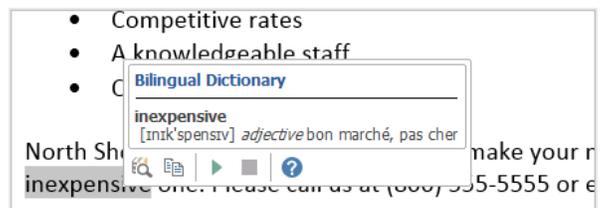


Figure 16-7: Use the Mini Translator to translate a single word in a document.

Publishing a Blog Entry

Blogs have become one of the most popular ways to make your voice heard on the Internet. More popular than personal Web pages, a blog (Web log) is a Web site where entries about an individual's thoughts are recorded. Most are themed for politics, food, or another topic of the author's choice. Others are run more like an online journal.

Register a blog service provider with Word

You need a blog provider that hosts and maintains your blog before you begin writing blog entries in Word. Word 2013 works with several blog service providers. These providers are listed in Table 16-1: Blog Service Providers.

Once you have a blog account with a blog service provider, you can register the blog's information in Word.

 **Tip:**

- ✓ If you don't register your blog account in Word, you won't be able to publish entries to your blog from Word.

Create a blog post

Creating an actual blog entry is not very difficult at all. Just use the commands available to you in the Blog Post and Insert tabs on the Ribbon and publishing to your registered account is a snap.

1. Click the **FILE** tab on the Ribbon and select **New**.
Options for creating a new document appear.
2. Select the **Blog post** template under Featured templates and click the **Create** button.
The Word document will convert itself into a blog post. You can continue to edit your entry or publish your post.
3. Enter a **Post Title** and, if necessary, create your blog post entry.

A blog post entry can be any combination of text and items you can insert under the Insert tab, such as pictures, links, or videos.

When the post is ready, publish it to your blog.

4. Click the **Publish** button in the Blog group.
The Connect to dialog box appears.

Exercise

- **Exercise File:** None required.
- **Exercise:** Create a blog post. If you wish, register your blog service provider with Word and publish the blog post.

Table 16-1: Blog Service Providers

✓	SharePoint blog
✓	WordPress
✓	Blogger
✓	Windows Live Spaces
✓	Community Server
✓	TypePad

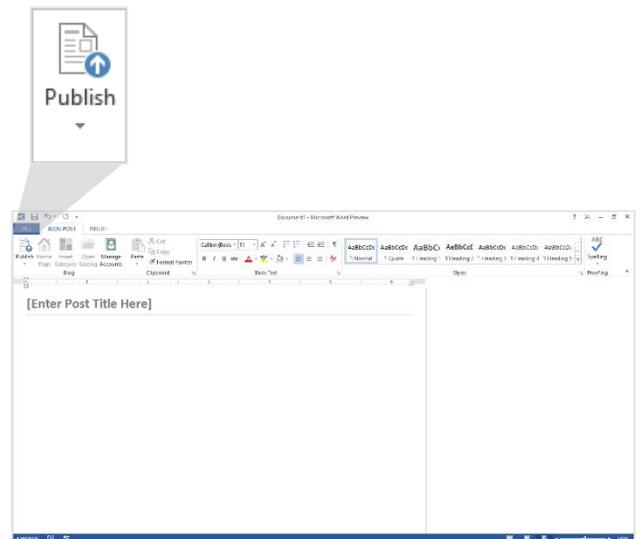


Figure 16-8: When the post is completed it can be published directly to your blog (as long as your blog service is registered with Word).

5. Click the **User Name** text box and enter your user name.
6. Click the **Password** text box, enter your password, and click **OK**.

The Microsoft Office Word dialog box appears, telling you that it may be possible for other people to see information such as your blog user name and password.

7. Click **Yes**.

A message appears informing you that the blog post was published.

Register with another provider

You can register with another blog service provider if yours is not listed in Word.

1. Click the **FILE** tab on the Ribbon and select **New** to create a new blog post. Select the **Blog post** template under the Featured templates section and click the **Create** button.

If you have not registered a blog service provider, the Register a Blog Account dialog box appears.

2. Click **Register Now**.

The New Blog Account dialog box appears.

3. Click the **Blog** list arrow and select **Other** from the list. Click **Next**.

The New Account dialog box appears. The information required in this dialog box is available from the blog service provider.

4. Type your user name, password, API, and blog post URL. Click **OK**.

Word confirms the information with the provider. Once the confirmation process is complete, you can begin writing and posting blog entries using Word.

✔ Tip:

- ✓ If you have multiple blogs, click the Blog Post tab and click the **Manage Accounts** button in the Blog group to set a default account, add an account, or remove an inactive account.

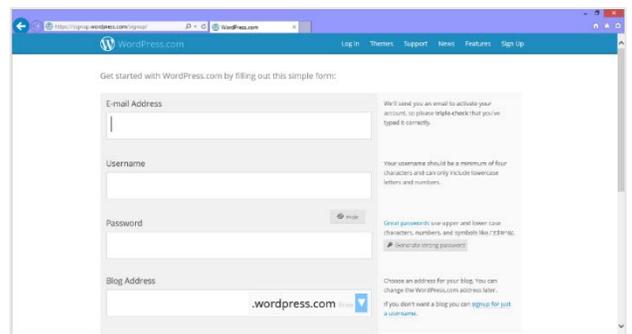


Figure 16-9: The registration page at Wordpress.com

Using Hyperlinks

If you have ever been on the World Wide Web, you've used hyperlinks to move between different Web pages. A hyperlink points to a file, a specific location in a file, or a Web page on the Internet or your organization's Intranet. Whenever you click a hyperlink, you jump to the hyperlink's destination.

Tip:

- ✓ A hyperlink is usually indicated by colored and underlined text.

Insert a hyperlink

You can insert a hyperlink anywhere in a document.

1. Select the text you want to use for the hyperlink.

Hyperlink text is often part of a regular sentence. For example, "The [Elk Pine Lodge](#) is the premier locale for destination weddings in Colorado."

2. Click the **INSERT** tab on the Ribbon and click the **Hyperlink** button in the Links group.

The Insert Hyperlink dialog box appears.

Other Ways to Insert a Hyperlink:

Select the text to which you want to add a hyperlink and press **<Ctrl> + <K>**. Or, right-click the text and select **Hyperlink** from the contextual menu.

There are four different types of hyperlinks you can create:

- **Existing File or Web Page:** Create a link that takes you to another Word document or to a file created in another program, such as a Microsoft Excel worksheet or Web page on the Internet. This is the most common type of hyperlink.
- **Place in This Document:** Takes you to a bookmark in the same document.
- **Create New Document:** Creates a new Microsoft Word document and then inserts a hyperlink to the new document.
- **E-mail Address:** Creates a clickable e-mail address.

3. Click the **Link to** button you want to use.

The dialog box changes to allow you to select the destination of the hyperlink.

Exercise

- **Exercise File:** Description15-4.docx
- **Exercise:** Select "North Shore Travel" in the first body paragraph. Use it as the text for a link to <http://www.customguide.com>. Delete the link.

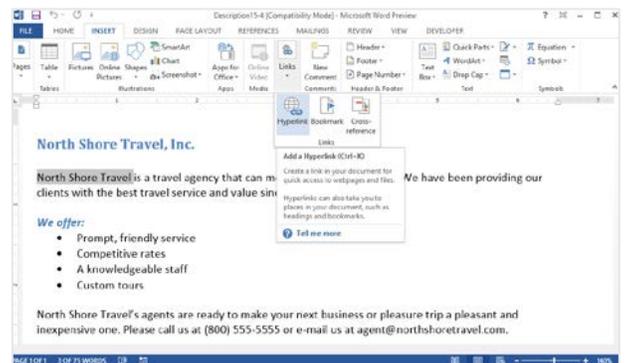


Figure 16-10: Inserting a hyperlink.

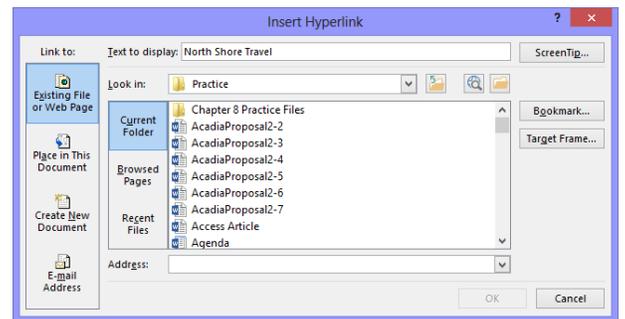


Figure 16-11: The Insert Hyperlink dialog box.

4. Enter information for what you want the hyperlink to link to.
Once the hyperlink destination is set, create the link.

5. Click **OK**.

Edit a hyperlink

You can change a hyperlink's display text, type, or destination after it is inserted.

1. Right-click the hyperlink and select **Edit Hyperlink** from the contextual menu.

The Edit Hyperlink dialog box appears. You can change the type of link, the link's destination or target, or the text that is displayed for the hyperlink.

2. Edit the hyperlink and click **OK**.

The hyperlink is updated with the new information.

Delete a hyperlink

If you no longer want to include a hyperlink in the Web page or document, it is easy to remove the hyperlink from the text.

Right-click the hyperlink and select **Remove Hyperlink** from the contextual menu.

The hyperlink is removed from the text.

-  **Other Ways to Remove a Hyperlink:**
Right-click the hyperlink and select **Edit Hyperlink** from the contextual menu. Click **Remove Link** in the Edit Hyperlink dialog box.

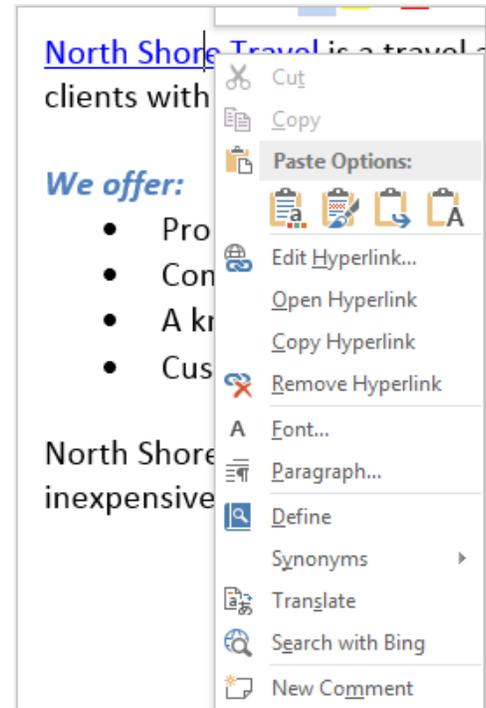


Figure 16-12: Right-click a hyperlink for more hyperlink commands.

Viewing Document Properties and Finding a File

Document properties are bits of information that describe and identify a document. This information includes the title, author name, subject, and keywords in the document. You can also add your own tags to properties to help organize and identify the document later.

View document properties

1. Click the **FILE** tab on the Ribbon and select **Info**.

The standard document properties appear on the right side of the window. You can also view more advanced properties.

2. Click the **Show All Properties** link at the bottom of the screen.

All document properties are displayed. Once you are done viewing and editing document properties, you can return to your document.

 **Tip:** To add or change properties, hover your pointer over the property you want to update and type the information.

3. Click the **FILE** tab on the Ribbon.

Any changes you made to document properties are saved automatically.

Show the Document Panel

You can also view and edit a document's properties by opening the Document Panel.

1. Click the **FILE** tab on the Ribbon and select **Info**.

Information about your document appears.

2. Click the **Properties** button list arrow and select **Show Document Panel** from the list.

The document returns to Normal view, and the Document Information Panel appears with the document's standard properties displayed.

3. To modify the document's standard properties, click the appropriate field and enter the desired information.

The information is modified. You can also view more advanced properties.

Exercise

- **Exercise File:** Timesheet15-5.docx
- **Exercise:** View the Timesheet.docx document properties and add "Human Resources" to the Tags property. Search for "times" in the Search box under the Start button.

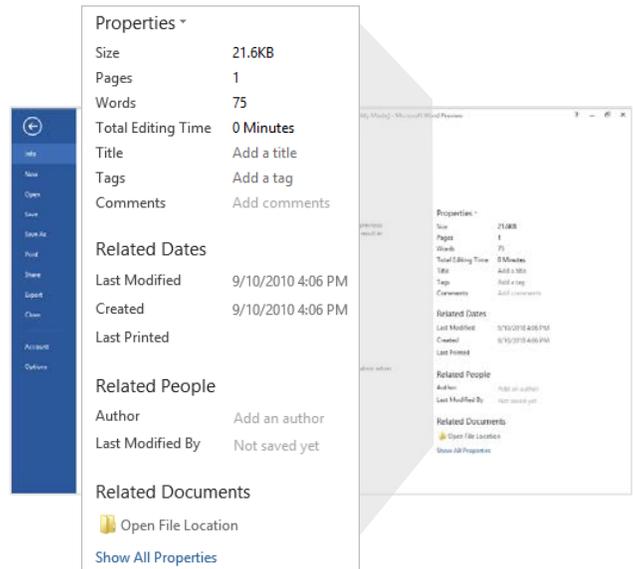


Figure 16-13: Document Properties appear on the Info tab in Backstage view.

More Properties

4. Click the **Document Properties** list arrow in the upper-left corner of the Document Panel and select **Advanced Properties**.

The Properties dialog box appears. Use these tabs to view and change more document properties.

5. Make any changes as necessary and click **OK** when you're finished.

The Properties dialog box closes.

6. Click the **Close** button in the Document Panel.

The Document Panel closes.

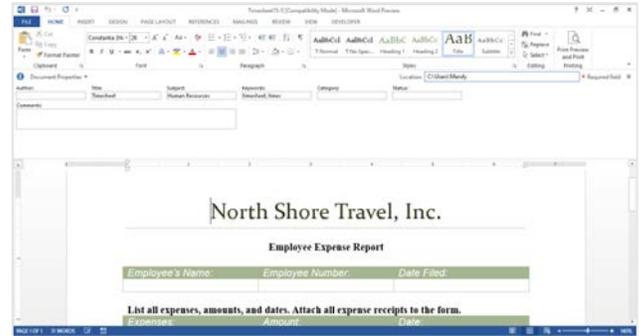


Figure 16-14: The Document Panel.

Find a file

It is just as easy to misplace and lose a file in your computer as it is to misplace your car keys—maybe easier! Luckily, Windows comes with a great search feature that can track down your lost files. Search can look for a file, even if you can't remember its exact name or location.

1. Click the **Start** button and type what you want to search for in the Search for programs and files search box.

Instant Search looks for file names, file contents, and file tags that match the text you are searching for and displays the results in the Start menu.

2. Click the file that matches your search.

The selected file appears.

Recovering Your Documents

Computers don't always work the way they're supposed to. Nothing is more frustrating than when a program, for no apparent reason, decides to take a quick nap, locks up, and stops responding to your commands—especially if you lose the precious document that you're working on!

Fortunately, Microsoft realizes that people might want to recover their documents when Microsoft Word locks up or stops responding. If Word 2013 encounters a problem and stops responding, you can restart Microsoft Word or your computer and try to recover your lost documents. Sometimes Word will display a dialog box similar to the one shown below and automatically restart itself.

Understand how AutoRecover works

If AutoRecover is enabled in Word, you don't have to do anything to make it work. When Word suddenly crashes, Word automatically restarts and returns as close as it can to the state of the program as it was. For example, if you had several documents open, Word would reopen all the documents to the same window size and status before the crash.

1. Restart Microsoft Word (if it doesn't restart by itself).

In a majority of cases, Word will restart on its own.

2. Select the best recovered document in the Document Recovery task pane.

Sometimes Word will display several recovered documents in the Document Recovery task pane, such as the original document that was based on the last manual save, and a recovered document that was automatically saved during an AutoRecover save process. You can see the status of any recovered document by simply pointing at the recovered document for a second or two.

3. Click **Close** to close the task pane.

You can resume working with the document(s).

Exercise

- **Exercise File:** None required.
- **Exercise:** Understand how AutoRecover works. Change the AutoRecover save interval to 8 minutes.

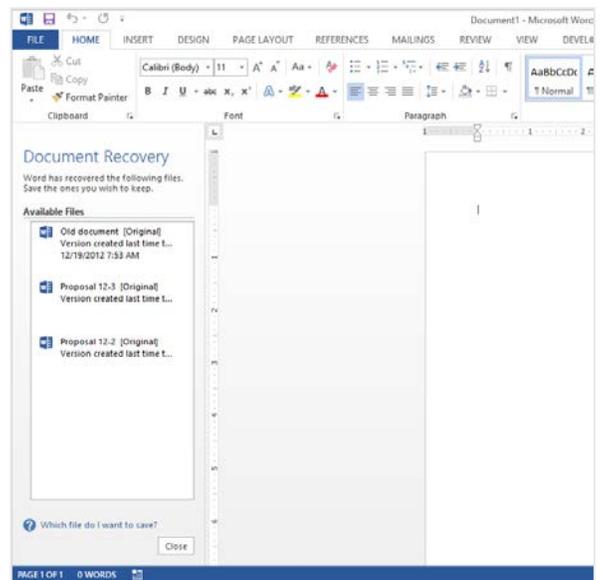


Figure 16-15: The Document Recovery task pane appears when Word reappears after closing abnormally.

Table 16-2: Status Indicators in the Document Recovery Task Pane

Original	Original file based on last manual save.
AutoSaved	File recovered during recovery process or file saved during an AutoRecover save process.
Repaired	Word encountered problems while recovering the document and has attempted to repair them.

Change AutoRecovery settings

You can further protect your work by using the AutoRecover feature to periodically save a temporary copy of the document you're working on. To recover work after a power failure or similar problem, you must have turned on the AutoRecover feature before the problem occurred. You can set the AutoRecover save interval to occur more frequently than every 10 minutes (its default setting). For example, if you set it to save every 5 minutes, you'll recover more information than if you set it to save every 10 minutes. Here's how to change the AutoRecover save interval...

1. Click the **FILE** tab and select **Options**.

The Word Options dialog box appears.

2. Click the **Save** tab.

Options for how to customize save settings appear.

3. Under Save Documents, ensure that the **Save AutoRecover information every** check box is checked and specify the desired interval, in minutes, in the minutes box.

You can't specify the interval if the check box is not selected.

4. Click **OK** when you're finished.

Now Word will automatically save a copy of the document at regular intervals as you use Word.

✓ Tip:

- ✓ Even with Word's document recovery features, the best way to ensure that you don't lose much information if your computer freezes up is to save your work regularly.

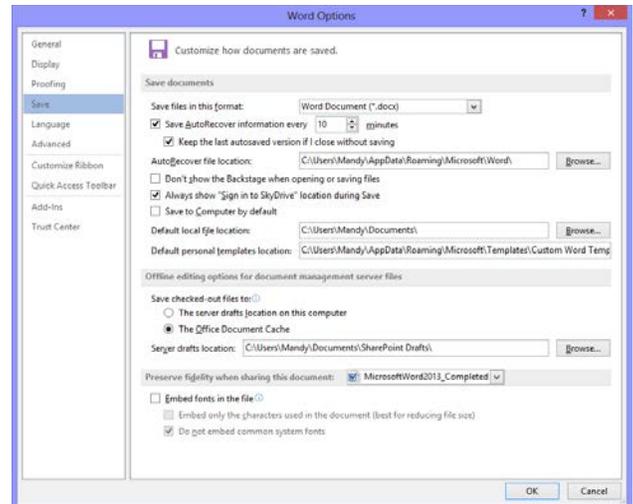


Figure 16-16: The AutoRecover options are located in the Save tab of the Word Options dialog box.

Managing Versions

No matter how many warning dialog boxes Word displays, sometimes you close a document without saving it. Word makes it easy for users to recover documents that were automatically saved using the AutoRecover option.

Tip:

- ✓ Word stores an unsaved document for four days after the document has been closed.

Recover new documents

You can recover new documents that you created but closed without saving.

1. Open Microsoft Word.
 2. Click the **FILE** tab on the Ribbon and select **Info**.
Information about the current document is displayed.
 3. Click the **Manage Versions** button and select **Recover Unsaved Documents**.
The Open dialog box appears.
 4. Select the file you want to open and click **Open**.
The document opens in a new Word window.
- Tip:** If you want to save the file, click the **Save As** button in the Info bar.

Recover previously saved documents

If you make edits to a saved file then close it without saving, you can recover the last AutoSave version.

1. Open the saved document.
2. Click the **FILE** tab on the Ribbon and select **Info**.
Information about the document appears.
3. Under the Versions section, select the version of the file labeled **(when I closed without saving)**.
The file opens. You can choose to restore the file or compare it to the previously saved version.

Exercise

- **Exercise File:** None required.
- **Exercise:** Understand how to recover an unsaved document.

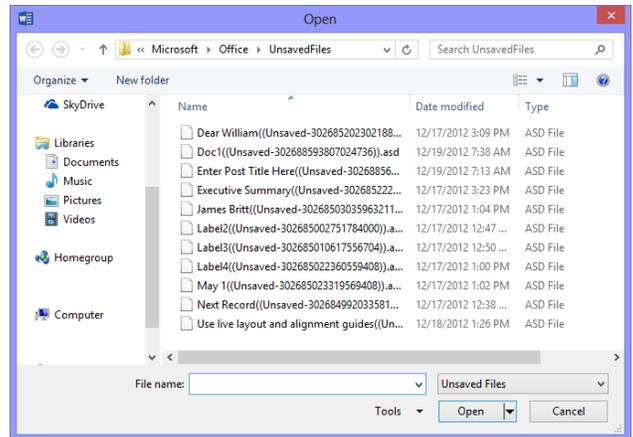
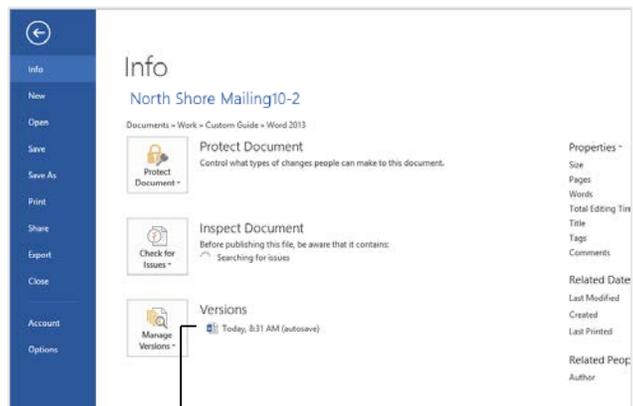


Figure 16-17: New documents that were closed without being saved are temporarily saved.



Click an AutoSave version to open and restore it.

Figure 16-18: AutoSave versions of a document can be found under Versions on the Info tab of Backstage view.

4. Click **Compare** or **Restore** on the Info bar.

Depending on what you choose, Word will either overwrite the previously saved version or open a new window comparing documents.

Restore earlier versions of the current document

You can also restore the file you are working on to an earlier version.

1. Click the **FILE** tab on the Ribbon and select **Info**.
Information about the document appears.
2. Under the Versions section, select the version of the file which you would like to view.
The file opens. You can choose to restore the file or compare it to the previously saved version.
3. Click **Compare** or **Restore** on the Info bar.

Depending on what you choose, Word will either overwrite the previously saved version or open a new window comparing documents.

- ✔ **Tip:** Most AutoSave versions of your open document will be deleted when you close the file.

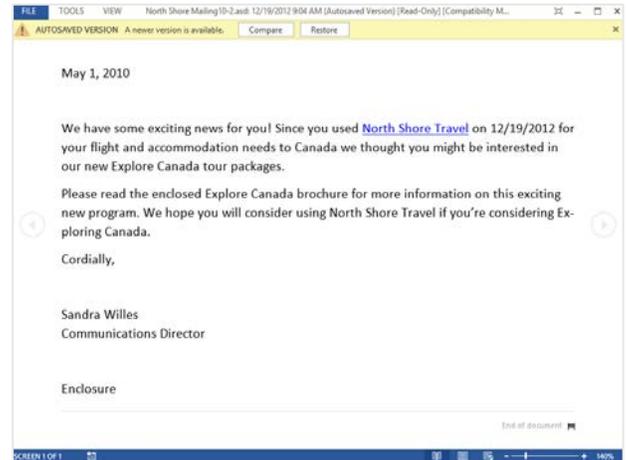


Figure 16-19: When you open an AutoSave version of a document, you can choose to compare it to the current document or to restore the AutoSave document.

Recording a Macro

A macro is a series of commands and instructions that are recorded so that they can be executed as a single command. Instead of manually performing a series of time-consuming, repetitive actions in Word yourself, you can create a macro to perform the task for you. There are two ways to create a macro: by recording them or by writing them in Word’s Visual Basic programming language. This lesson explains the easy way to create a macro—by recording the task(s) you want the macro to execute for you.

Show the DEVELOPER tab on the Ribbon

The DEVELOPER tab must be displayed on the Ribbon in order to access and insert the macro controls.

1. Click the **FILE** tab on the Ribbon and select **Options**.

The Word Options dialog box appears.

2. Click the **Customize Ribbon** tab.

The right column displays the tabs on the Ribbon and the groups and commands in each tab.

3. Select the **Developer** check box under Customize the Ribbon and click **OK**.

The Word Options dialog box closes, and the DEVELOPER tab is displayed on the Ribbon.

Record a macro

When you record a macro, imagine you’re being videotaped; everything is recorded—all your commands, the data you enter, even any mistakes you make. Before recording a macro, it’s helpful to write down a script that contains all the steps you want the macro to record.

Practice or rehearse your script a couple times, to make sure it works, before you actually record it.

If you do make a mistake while recording a macro, don’t worry—you can always delete the existing macro and try again or edit the macro’s Visual Basic source code to fix the mistake.

1. Click the **DEVELOPER** tab on the Ribbon and click the **Record Macro** button in the Code group.

The Record Macro dialog box appears.

2. Enter a name for the macro.

Next you can enter a number of specifications for the macro, including assigning a keystroke shortcut to the macro for easy access.

Exercise

- **Exercise File:** Timesheet15-10.docx
- **Exercise:** Show the DEVELOPER tab on the Ribbon.

Create a macro named “ExpenseReport”. Assign the keystroke shortcut <Ctrl> + <Shift> + <Y> to the macro and add the description, “This macro automatically fills out information for Sandra’s expense reports.” The macro should record these commands:

Go to the EmployeeName bookmark. Type “Sandra Wills”, press <Tab>, type “10369”, press <Tab>, and insert date and time using the Month Day, Year format.

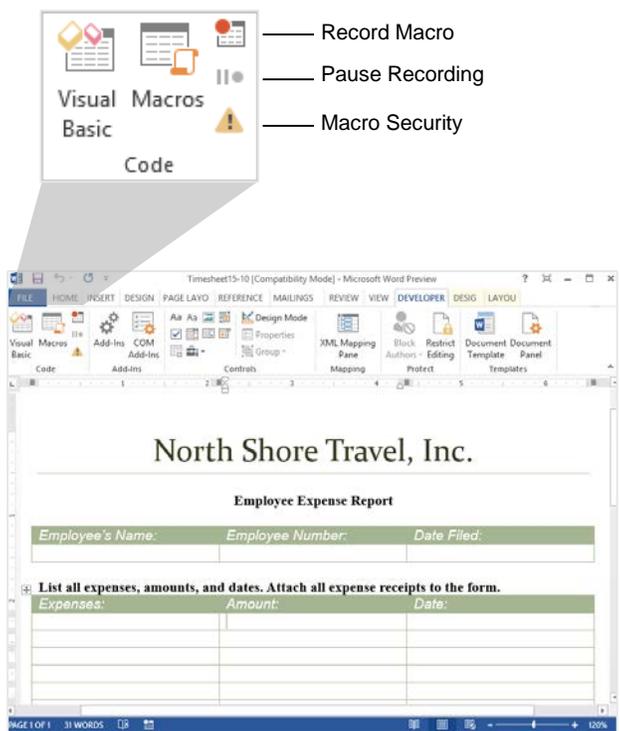


Figure 16-20: The Code group on the DEVELOPER tab.

- (Optional) Click the **Keyboard** button and in the **Press new shortcut key** box, press the keystroke shortcut that you want to use. Click **Close**.

If the keystroke is not already assigned to another command, [unassigned] appears in the dialog box.

You may also choose if you want to save the macro in the current document or template, or enter a description for the macro.

- Finish entering the macro information and click **OK**.

Now the Record Macro dialog box closes, and everything you do is recorded.

- Perform the actions you want to include in your macro.

You can perform a command from the Ribbon, a keystroke shortcut, or a dialog box.

✔ **Tip:** You cannot use the mouse to edit and select text as you normally would while recording a macro—you have to use the keyboard instead. You still can use the mouse to access the Ribbon, however.

✔ **Tip:** Use the **Pause Recording** button if you need to stop the macro command progression so you don't have to start all over again.

- Click the **Stop Recording** button in the Code group.

The macro is recorded and ready to use.

🔍 **Other Ways to Stop Recording:**
Click the **Stop Recording** button on the status bar.

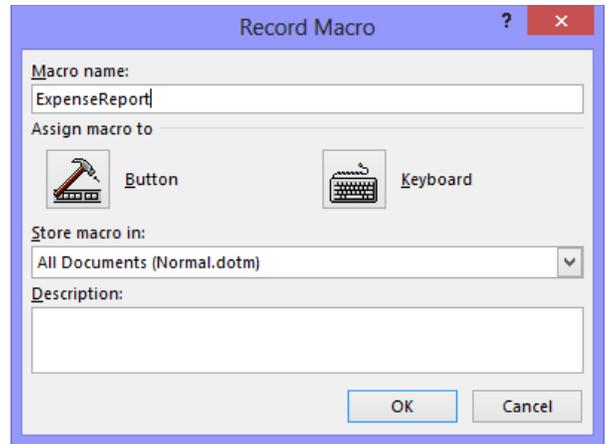
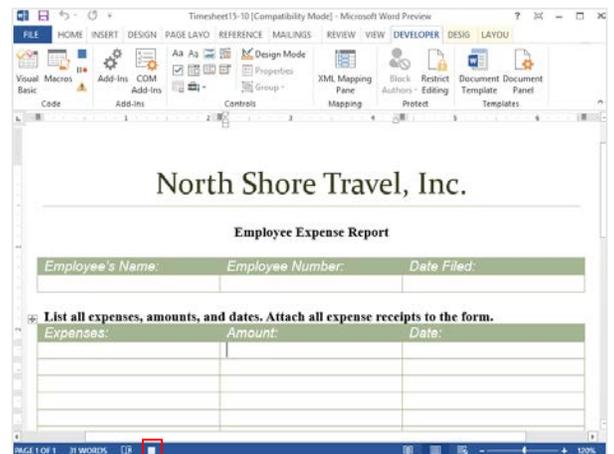


Figure 16-21: Enter a macro name that will be easily recognizable in the Record Macro dialog box. Include a description to make the macro even easier to find.



Click the Stop Recording button when you are finished recording the macro.

Figure 16-22: An example of recording a macro.

Playing and Deleting a Macro

Once you have created a macro, you're ready to use it in your documents.

Tip:

- ✓ If you see a Security Warning message beneath the Ribbon telling you that macros have been disabled, click the **Enable this content**, and click **OK**.

Play a macro

1. Click the **DEVELOPER** tab on the Ribbon and click the **Macros** button in the Code group.

The Macros dialog box appears. Here you can see the macros that are available in the document.

- 🔗 **Other Ways to View Macros:**
Press <Alt> + <F8>.

2. Select the macro you want to run and click the **Run** button.

The macro runs, performing the steps you recorded.

- 🔗 **Other Ways to Run a Macro:**
Click the button or press the keystroke shortcut assigned to the macro.

Delete a macro

Delete a macro when it is no longer needed. This lowers the security threat of the document.

1. Click the **DEVELOPER** tab on the Ribbon and click the **Macros** button in the Code group.

The Macros dialog box appears.

2. Select the macro you want to delete and click the **Delete** button in the dialog box.

Another dialog box appears, asking if you really want to delete the macro.

3. Click **Yes**.

The macro is deleted.

Exercise

- **Exercise File:** Timesheet15-11.docx
- **Exercise:** Run the ExpenseReport macro so that Sandra Wills' information appears in the table.

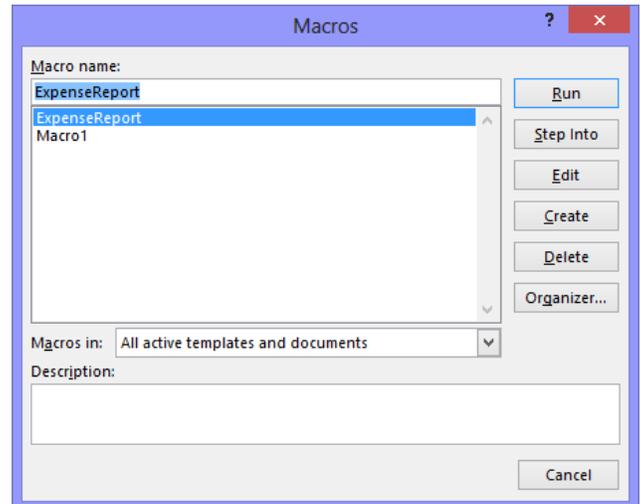


Figure 16-23: The Macros dialog box displays all macros that are available in the document.

Editing a Macro's Visual Basic Code

This lesson introduces you to the Visual Basic (also called VB or VBA) programming language—the code Word uses to record macros. Using the Visual Basic language and the Visual Basic editor, you can make minor changes to your macros once you have recorded them.

The best way to learn about Visual Basic is to view existing code. In this lesson we'll look at how to view and edit the code for an existing macro.

1. Click the **DEVELOPER** tab on the Ribbon and click the **Macros** button in the Code group.

The Macros dialog box appears. Here you can see the macros that are available in the document.

 **Other Ways to View Macros:**
Press <Alt> + <F8>.

2. Select the macro you want to edit and click the **Edit** button.

The Microsoft Visual Basic Editor program appears. Those funny-looking words are Visual Basic—the language that was used by Word to record the macro you created.

You don't have to learn Visual Basic to be proficient at Word, but knowing the basics can be helpful if you ever want to modify an existing macro. If you take a close look at the code for your macro, some of the procedures should make a little sense to you. For example, if your macro contains a copy or paste command, you may see the text "Selection.Copy" or "Selection.Paste".

You can delete sections of code to delete certain actions from the macro, or edit the code to change the macro's actions.

3. Edit the macro's code as desired, then click the **Save** button on the Standard toolbar.
4. Click the **Close** button in the upper right-hand corner.

The Visual Basic Editor window closes, and the Word program window becomes active once again.

Exercise

- **Exercise File:** Timesheet15-12.docx
- **Exercise:** Edit the ExpenseReport macro so that it enters "Brad Johnson" instead of "Sandra Wills" and "12561" instead of "10369".
Run the macro to see how it has changed.

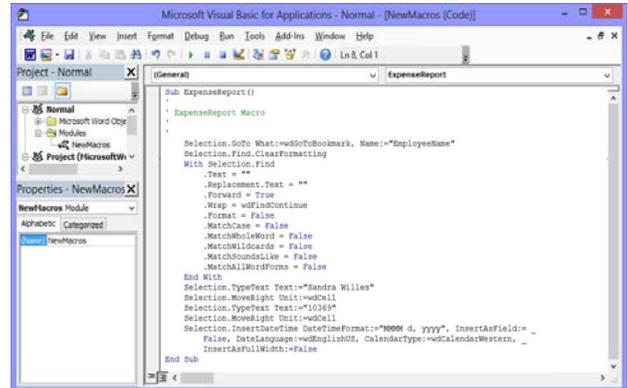


Figure 16-24: The Microsoft Visual Basic Editor.

More Topics Review

Quiz Questions

- 1.
2. The Convert button only appears when Word is in Compatibility Mode. (True or False?)
3. You can use the _____ to translate a single word in a Word document.
 - A. Mini Translator
 - B. Spell Checker
 - C. Grammar Checker
 - D. You cannot translate text into another language in Word.
4. Before you publish a blog post in Word, you must:
 - A. Convert your document to a .blg format.
 - B. Register with a blog service provider.
 - C. Insert hyperlinks into your document.
 - D. Click the Blog button in the Web Publishing tab on the Ribbon.
5. Blog entries can only contain text. (True or False?)
6. A hyperlink can take you to:
 - A. An existing Web page.
 - B. A different place in the document you are viewing.
 - C. An e-mail composition page.
 - D. All of the above.
7. Double-clicking a hyperlink will let you edit it.(True or False?)
8. You can see the status of any recovered document simply by pointing at it for a moment in the Document Recovery task pane. (True or False?)
9. You can specify how often a document is automatically saved. (True or False?)
10. If you close a document before you save it, the document is lost forever. (True or False?)
11. A macro is:
 - A. A very large document.
 - B. A series of instructions that can be executed as a single command.
 - C. A program that allows developers to translate Visual Basic programming into HTML so it can be displayed on the Internet.
 - D. An audio program that accompanies documents in Microsoft Word whenever it is opened.

12. To play a macro in the Macro dialog box, click the _____ button
- A. Run
 - B. Play
 - C. Macro
 - D. Go
13. Macros are written in the _____ programming language.
- A. ABC
 - B. Visual Basic
 - C. Basic Macro
 - D. Visual Office
14. You can delete a section of code without deleting an entire macro. (True or False?)

Quiz Answers

- 1.
2. True. The Convert button only appears when Word is in Compatibility Mode.
3. A. You can use the Mini Translator to translate a single word in a Word document.
4. B. Before you can publish a blog post from Word, you must register your blog service provider in Word.
5. False. Blog entries can contain images, videos, audio clips, and links.
6. D. A hyperlink can take you to an existing Web page, a different place within the current document, a new document, or an e-mail composition page.
7. False. Right-clicking a hyperlink will let you edit it.
8. True. You can see the status of any recovered document simply by pointing at it in the Document Recovery task pane.
9. True. You can specify how often a document is automatically saved.
10. False. If you have the AutoRecover option enabled, you can recover unsaved document from Backstage view.
11. B. A macro is a series of instructions that can be executed as a single command.
12. A. Click the Run button in the Macro dialog box to play a macro.
13. B. Macros are written in the Visual Basic programming language.
14. True. You can delete a section of code without deleting an entire macro.