

The Mouse Training Company



Word 2007 Advanced

<http://www.mousetraining.co.uk>

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INTRODUCTION

Word 2007 is a powerful word processing application that allows users to produce typed documents. These can range from simple letters through to fax cover sheets, reference manuals and sophisticated reports incorporating numbered headings, figures and graphics.

How To Use This Guide

This manual should be used as a point of reference following attendance of the introductory level Word 2007 training course. It covers all the topics taught and aims to act as a support aid for any tasks carried out by the user after the course.

The manual is divided into sections, each section covering an aspect of the introductory course. The table of contents lists the page numbers of each section and the table of figures indicates the pages containing tables and diagrams.

Instructions

Those who have already used a spreadsheet before may not need to read explanations on what each command does, but would rather skip straight to the instructions to find out how to do it. Look out for the arrow icon which precedes a list of instructions.

Appendices

The Appendices list the Ribbons mentioned within the manual with a breakdown of their functions and tables of shortcut keys.

Keyboard

Keys are referred to throughout the manual in the following way:

ENTER – Denotes the return or enter key, **DELETE** – denotes the Delete key and so on. Where a command requires two keys to be pressed, the manual displays this as follows:

CTRL P – this means press the letter “p” while holding down the Control key.

Commands

When a command is referred to in the manual, the following distinctions have been made:

When Ribbon commands are referred to, the manual will refer you to the Ribbon – E.g. “Choose **HOME** from the Ribbons and then **B** for bold”.

When dialog box options are referred to, the following style has been used for the text – “In the **PAGE RANGE** section of the **PRINT** dialog, click the **CURRENT PAGE** option”

Dialog box buttons are shaded and boxed – “Click **OK** to close the **PRINT** dialog and launch the print.”

Within each section, any items that need further explanation or extra attention devoted to them are denoted by shading. E.G.:

“Word will not let you close a file that you have not already saved changes to without prompting you to save.”



SECTION 1 ADVANCED TABLES

By the end of this section you will be able to:

- ✦ Move and copy table rows and columns
- ✦ Split a table
- ✦ Change table size and alignment
- ✦ Merge and split table cells
- ✦ Sort table data
- ✦ Add formulae to tables
- ✦ Draw tables



TABLES - ADVANCED FEATURES

Moving And Copying

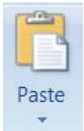
Rows and columns in a table can be moved using the same procedures as text within a document. However, the position of the insertion point when pasting or dragging rows and columns is important as it can alter the final result.

Using Cut/Copy & Paste

➤ To move or copy a row/column:

Mouse

- i. Select the row to be moved/copied or select the column to be moved/copied.
- ii. Click on the **CUT/COPY** button.
- iii. Select the row where you want to paste (Word pastes above) or select the column where you want to paste (Word pastes to the left).
- iv. Click on the **PASTE** button



Using Drag & Drop

Rows and Columns can also be moved or copied using standard drag and drop techniques.

➤ To Move the selection:

Mouse

- v. Click on the middle of the selected area and drag it to the new location

➤ To Copy the selection:

Mouse

- i. Click on the middle of the selected area and hold down the **CTRL** while you drag the selection to where you want to copy it. Release the mouse button **before** the **CTRL** key

Splitting A Table

Sometimes you need to split a table between rows to add text in-between.

➤ To split a table in two at the current cursor position:

Mouse

- i. Select the cell(s) you wish to split
- ii. Go to the **MERGE** group on the **LAYOUT** ribbon and click the **SPLIT TABLE** button.

Or

Keyboard

- i. Press **CTRL SHIFT ENTER**



- ii. To rejoin tables that have been split, simply delete the paragraph marker between them.

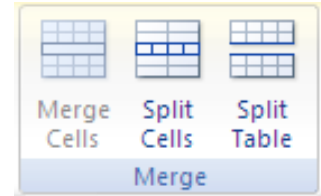
Merging And Splitting Cells

When you have inserted your table there may be times in a number of cells that you would want them as one cell and not several and similarly you may wish for one cell to be split into several. In 2007 this feature is easy to do. Not only can you split cells but you can split a whole table into multiple tables if the need arises

➤ To split cells

Mouse

- i. Select the cell(s) you wish to split
- ii. Go to the **MERGE** group on the **LAYOUT** ribbon and click the **SPLIT CELLS** button.



➤ To merge cells

Mouse

- i. Select the cells you wish to merge.
- ii. Go to the **MERGE** group on the **LAYOUT** ribbon and click the **MERGE CELLS** button.

➤ To split Table

Mouse

- i. Click in the row that you wish to be the first row of the split table.
- ii. Go to the **MERGE** group on the **LAYOUT** ribbon and click the **SPLIT TABLE** button.
- iii. The table will split above the row your cursor is in.



TABLE SIZE AND ALIGNMENT

The columns, rows and positioning of a table on the page are all adaptable. Some of the techniques for getting the best results when changing these options are outlined below.

Advanced Column Width Techniques

When you adjust the width of a column, Word proportionately resizes the other columns to the right so that the overall table width does not change. However it is possible to be more precise about how the remaining columns should be affected.

The **SHIFT** key allows the width of a column to be altered and increases the overall width of the table accordingly.

--	--	--

To increase the width of column 1, click over the column boundary and drag it with the mouse...

--	--	--

Column 2 becomes narrower

To increase the width of column 1 without altering the width of column 2, click over the column boundary, hold down the **SHIFT** key and drag it with the mouse...

--	--	--

Column 1 width increases and so does the overall width of the table

Row Height

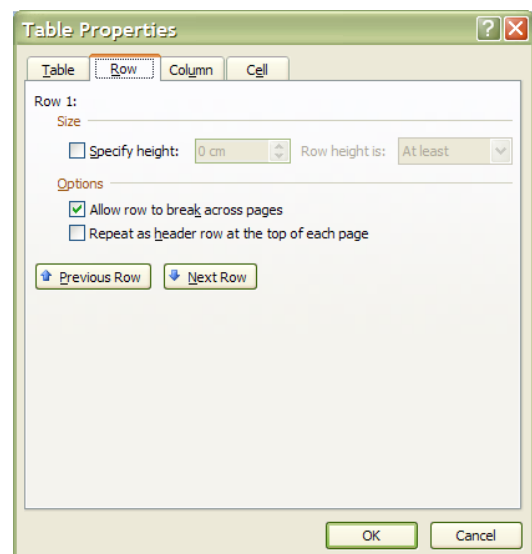
The height of the rows in a Word table is usually controlled by the contents of the cell. If the text in a cell is too wide, Word will wrap the text within the cell. Using the **ENTER** key to insert blank lines within a cell can also alter the height of rows.

In a situation where a cell's height needs to be set precisely there is an option on the layout ribbon that allows you to input a specific measurement. This is particularly useful if tables are being used to create forms and space should be left for people to fill the form in.

➤ To change the row height:

Mouse

- Select the rows where the height is to be changed
- Choose **PROPERTIES** from the **DESIGN** ribbon
- Select the **ROW** Tab in the dialog
- Use the **ROW HEIGHT IS:** field to set a precise size





The options in the **HEIGHT** drop-down list are outlined next:

Option	Result
Exactly	This sets a specific height that will not adjust
At Least	Enables specification of a minimum height, but will still fit rows around text that is taller

Using The Ruler

The height of a row can also be adjusted by using the vertical ruler in print layout view.

You can also use the before and after options in the Paragraph format dialog box to space out text within cells in a table.

Table Alignment

Tables can be aligned to the left, right or centre of the page. The default for tables is left aligned. Individual rows can be aligned - but if the whole table is to be affected, ensure that the entire table is selected before issuing the command.

➤ To change table alignment:

Mouse

- Select the row(s) to align or the whole table.
- Choose **PROPERTIES** from the **DESIGN** ribbon.
- Click on the **TABLE** tab, and select the required alignment.

Indenting Rows

The whole table or individual rows may also be indented.

➤ To indent table rows:

Mouse

- Select the row(s) or table.
- Choose **PROPERTIES** from the **DESIGN** ribbon.
- Click on the **TABLE** Tab.
- Set the indent in the **INDENT FROM LEFT:** field

To indent text within cells, use the indent options within the Paragraph format dialog box.

Sorting Cells

You can quickly sort cells, arranging the entries in alphabetic, numeric or date order. Word changes the order of rows based on the first column unless you specify otherwise.

COUNTRY	YEAR	INVESTMENT
Albania	1998	1,867,659.00
Bulgaria	1999	657,948,945.00
Romania	1998	867,482,475.00



ADVANCED TABLES

Turkmenistan	1999	768,958,372.00
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The table above is currently in alphabetical order by Country. Supposing you wanted to sort the table by Year, and where the year is the same, you want it sub-sorted by Investment.

➤ **To sort the table:**

Mouse

- Select the table.
- Under **TABLE TOOLS**, on the **LAYOUT** ribbon, in the **DATA** group, click **SORT**.
- In the **SORT** dialog box, select the options that you want.
- Choose the main **SORT BY** column from the drop-down list.



- Select the **TYPE** of information in that column (Text, Number or Date).
- Choose the **SORT ORDER** (Ascending or Descending).
- Repeat this process in the **THEN BY** field if you are sub-sorting.

The table from the previous page would now appear like this:

COUNTRY	YEAR	INVESTMENT
Albania	1998	1,867,659.00
Romania	1998	867,482,475.00
Bulgaria	1999	657,948,945.00
Turkmenistan	1999	768,958,372.00

HEADER ROW the first row in the table will not be included in the sort, and the text in the cells of that row will appear as choices in the Sort by/Then by fields.

NO HEADER ROW all the rows will be included in the sort, and you select the column number to sort by (rather than the names).

The choice here depends on whether your table has headings in the first row:

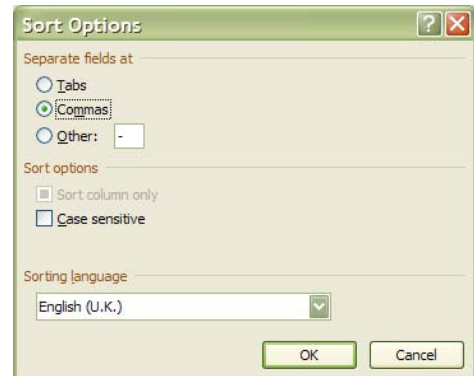


Sort A Single Column In A Table

➤ To sort a single column

Mouse

- i. Select the column that you want to sort.
- ii. Under **TABLE TOOLS**, on the **LAYOUT** ribbon, in the **DATA** group, click **SORT**.
- iii. Under **MY LIST HAS**, click **HEADER ROW** or **NO HEADER ROW**.
- iv. Click **OPTIONS**.
- v. Under **SORT OPTIONS**, select the **SORT COLUMN ONLY** check box.
- vi. Click **OK**.



Sort By More Than One Word Or Column Inside A Table.

To sort the data in a table that is based on the contents of a column that includes more than one word, you must first use characters to separate the data — including data in the header row. E.G. if the cells in a column contain both last and first names, you can use commas to separate the names.

➤ To sort a table by multiple columns

Mouse

- i. Select the column that you want to sort.
- ii. Under **TABLE TOOLS**, on the **LAYOUT** ribbon, in the **DATA** group, click **SORT**.
- iii. Under **MY LIST HAS**, click **HEADER ROW** or **NO HEADER ROW**.
- iv. Click **OPTIONS**.
- v. Under **SEPARATE FIELDS AT**, click the type of character that separates the words or fields that you want to sort, and then click **OK**.
- vi. Under **SORT BY**, in the **USING** list, select which word or field you want to sort by.
- vii. In the first **THEN BY** list, enter the column that contains the data that you want to sort by, and then in the **USING** list, select which word or field you want to sort by.
- viii. If you want to sort by an additional column, repeat this step in the second **THEN BY** list.
- ix. Click **OK**.



Table Formulas

You can write formulae inside table cells to perform common calculations. You can use A1, B1-style references as you might in an Excel spreadsheet. However, you are not able to create relative cell references, therefore formulas cannot be copied across a row or down a column.

P & L Account	
Sales	£100,000.00
Costs	£64,000.00
Profits	£36,000.00

Formula used to work out profit

➤ To create a formula:

Mouse



- Position the mouse in the destination cell
- Under **TABLE TOOLS**, on the **LAYOUT** ribbon, in the **DATA** group, click **FORMULA**.
- Word may automatically suggest a formula, which you can overwrite. Use the = sign to begin the formula and the same mathematical operators as are used in Excel (, -, *, /).
- Use A1 style references to cells within the table - you will have to work out which reference will apply to each cell you are referring to. In the example above, the profit has been worked out using the formula =B2-B3, and assigning a currency number format to get the £ sign.

Formatting Numbers

You can format a formula's results by using the drop-down list of Number Formats in the formula dialog. The available formats are similar to those in Excel, such as Comma, Currency and Percentage.

Updating The Formula

If the figures in the table change, the formula result only updates when you print the document. If you want to see the new result on the screen, you will need to manually update the formula.

➤ To update a formula's result:

Keyboard

- Click on the cell containing the result
- Press **F9**.



AutoSum

When you insert a formula into a cell, Word will detect numbers in the cells above and to the left of the current cell and may offer to sum them for you.

Positioning at the bottom of a column of numbers automatically creates a **=SUM(ABOVE)** function. Positioning to the right of a row of numbers automatically creates a **=SUM(LEFT)** function. You can also use **BELOW** and **RIGHT** to refer to adjacent cells below or to the right of formulas.

Functions

You can paste in an Excel function, such as **AVERAGE**, **COUNT** or **IF** from a list contained in the Formula dialog. E.G. to count the number of entries in a column above the cell where the cursor is positioned, choose:

=COUNT(ABOVE)

Nesting Functions

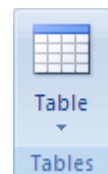
Once the function is pasted in, you can use cell references. You can also 'nest' functions inside others using the Paste function: list. E.G. to add a different rating depending on the highest value in the column above, enter:

=IF(MAX(ABOVE)>50000,"WELL DONE","TRY HARDER")

Draw A Table

You can draw a complex table — E.G. one that contains cells of different heights or a varying number of columns per row.

- i. Click where you want to draw the table.
- ii. On the **INSERT** ribbon, in the **TABLES** group, click **TABLE**.
- iii. Click **DRAW TABLE**.
- iv. The pointer changes to a pencil.
- v. To define the outer boundaries of the table, draw a rectangle.
- vi. Draw column and row lines inside the rectangle.
- vii. To erase a line or block of lines, under **TABLE TOOLS**, on the **DESIGN** ribbon, in the **DRAW BORDERS** group, click **ERASER**.

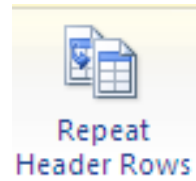


- viii. Click the line that you want to erase. When you are finished, click **DRAW TABLE** to continue drawing the table.
- ix. When you finish drawing the table, click in a cell and start typing or insert a graphic.



Chart Options

Icon	Function	Ribbon & group
	Draw Table - Inserts a table where you drag in the document. After creating the outside of the table, drag inside to create columns and rows.	Design , draw borders
	Eraser - Removes a table cell line and merges the contents of the adjacent cells.	Design , draw borders
	Line Style - Choose the line style and thickness to draw your table with.	Design , draw borders
	Line Weight - Choose the width of the border you require.	Design , draw borders
	Border Colour - Choose the colour of the border you require.	Design , draw borders
	Borders - Allows you to add a border of some type to the table or individual cells.	Design , Table styles
	Shading Colour - Allows you to select a colour to fill the table or individual cells.	Design , Table styles
	Merge Cells - Combines the contents of selected adjacent cells into a single cell.	Layout , Merge
	Split Cells - Splits the selected cells into the number of rows or columns you specify.	Layout , Merge
	Distribute Rows - Alters the height of the selected cells to make them equal.	Layout , Cell size
	Distribute Columns - Alters the width of the selected cells to make them equal.	Layout , Cell size
	Change Text - Changes direction of the selected text in a cell horizontally, left or right.	Layout , alignment
	Sort Ascending - Sorts the selected items alphabetically from the beginning of the alphabet.	Home , paragraph
	Sort Opens the sort dialog box	Layout , data
	Formula - Allows calculations to be entered into a cell.	Layout , data
	Align Top Left, Centre & Right - Aligns the text contained within the selected table or cells at the top of the cell.	Layout , alignment
	Align Centre Left, Centre & Right - Aligns the text contained within the selected table or cells in the centre of the cell.	Layout , alignment
	Align Bottom Left, Centre & Right - Aligns the text contained within the selected table or cells at the bottom of the	Layout , alignment



	cell.	
--	-------	--

Repeating Table Headings

When a table spreads across more than one page, it can be useful to automatically repeat the first row(s) of the table on each page as the first row(s) will often contain headings that apply to the columns of the table. If you choose to repeat table headings, the rows you have chosen will automatically be inserted at the top of each new page the table spreads onto. To edit the heading rows or make formatting changes, you must go back to the top of the table as it is simply an image of the first row(s) on the other table pages.

➤ To repeat table headings:

Mouse


- i. Select the row(s) that you wish to repeat at the top of each page that the table prints on.
- ii. Go to the **DATA** group on the **LAYOUT** ribbon and click the **REPEAT HEADER ROWS** button

You will only see the repeating headings when you are in Print Layout or Print preview



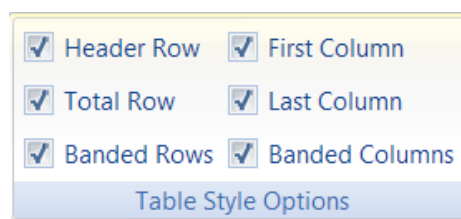
Use Table Styles To Format An Entire Table

After you create a table, you can format the entire table by using Table Styles. By resting your pointer over each of the preformatted table styles, you can preview what the table will look like.

- i. Click in the table that you want to format.
- ii. click the **DESIGN** ribbon. In the **TABLE STYLES** group, rest the pointer over each table style until you find a style that you want to use.
- iii. To see more styles, click the **MORE** arrow . 
- iv. Click the style to apply it to the table.



- v. In the **TABLE STYLE OPTIONS** group, on the **DESIGN** ribbon select or clear the check box next to each of the table elements to apply or remove the them from the selected style.





SECTION 2 ADVANCED FORMATTING TECHNIQUES

By the end of this section you will be able to:

- ✦ Understand what styles are
- ✦ Apply default styles to paragraphs and text
- ✦ Create styles
- ✦ Redefine styles
- ✦ Copy styles between documents
- ✦ Apply borders to text, paragraphs and pages
- ✦ Create and use columns



STYLES

In Word, a "style" is a collection of font and paragraph formats given a specific name. It may be used to apply formatting to areas of a document quickly or to make changes easily to everything, which already has a certain style applied. A style can either apply to a whole paragraph of text or to a few individual characters.

Default Styles

Word supplies a number of default styles, which are attached to the Normal Template. These may be altered to reflect personal choices.

Normal Style

The "Normal" style, in the Style list box (found on the extreme left side of the Formatting toolbar), controls the overall characteristics of most of the text in a document and is the style that will be first seen on opening a new document.

Headings 1 - 9

Word supplies nine heading styles, which variously underline, bold, and indent etc. the text they are applied to. When a new document is created, based upon the Normal Template, only three heading styles appear to be available but you can see all the possible default styles by holding down the SHIFT key as you click the drop-down arrow on the right of the Style list box.

Default Paragraph Font

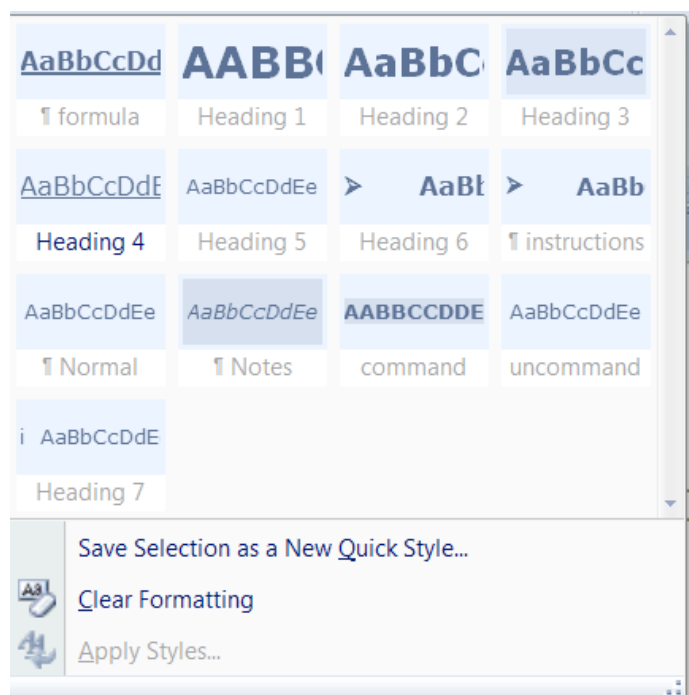
When you have applied a style to a paragraph, you may decide to add some extra formatting. If at a later point you then want to remove the extra formatting and return to the underlying style format you can use this style to do so.

You can choose from a variety of methods to apply styles to existing text in a document.

➤ To apply a style using the Quick style gallery:

Mouse

- Go to the **STYLES** group on the **HOME** ribbon
- Select a style you can see or click on the down arrow to the bottom right of the visible styles to open the style gallery
- More styles may be available by scrolling down.
- Click on selected style to apply





➤ To - apply a style - dialog

keyboard

- i. Press **CTRL SHIFT S**, followed by ↓
- ii. Select a style from the dialog that appears..

➤ To apply a style using a shortcut key:

Keyboard

- i. Heading styles 1 to 3 already have the shortcut keys **CTRL ALT** num defined, where num is 1 for heading style 1 and so on.

➤ To apply a style from styles task pane

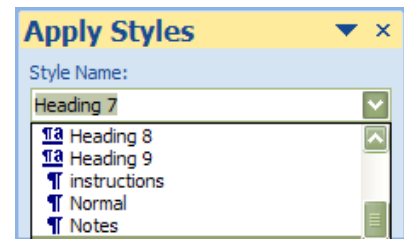
Mouse

- i. Click on the **DIALOG BOX LAUNCHER** on the **STYLES** group on the **HOME** ribbon
- ii. Select any style visible

➤ To change to another style:

Mouse

- i. Select the paragraph(s) to be changed
- ii. Click on the required style from the Style window.



Creating New Quick Styles

You might want to create a new style and add it to the Quick Styles gallery, or you might want to add a style that does not appear in the Quick Styles gallery but that you use often.

➤ To create a new style:

Mouse

- i. Select the paragraph(s) that you want to apply the new style to
- ii. Change the format of the font, paragraph etc. as required
- iii. Go to the **STYLES** group on the **HOME** ribbon
- iv. Select the down arrow to the bottom right of the visible style to open the gallery
- v. Select **SAVE SELECTION AS NEW QUICK STYLE** from the available choices.
- vi. New style will be found in the **QUICK STYLE GALLERY**.

It is also possible to create a new style using the styles task pane. The window can be opened by clicking on the **DIALOG BOX LAUNCHER** on the **STYLES** group on the **HOME** ribbon



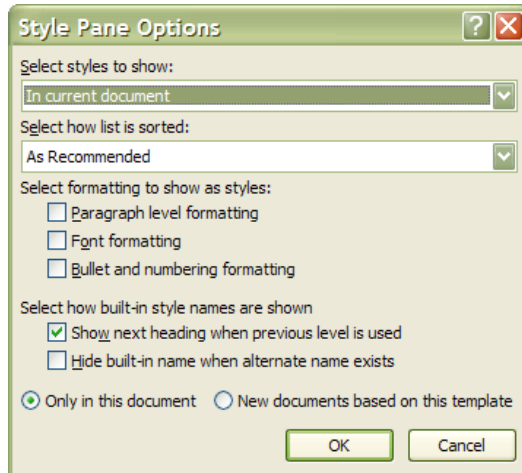


Adding & Removing Styles From Gallery

➤ To move a style to the Quick Styles gallery

Occasionally, a style is removed from the Quick Styles gallery, or it does not appear in the list of styles. When that happens, it's easy to move a style to the Quick Styles gallery so it's available for you to use.

- i. On the **HOME** ribbon, click the **STYLES DIALOG BOX LAUNCHER**, to open the **STYLES** task pane and then click **OPTIONS** bottom right hand corner



- ii. Under **SELECT STYLES TO SHOW**, click **ALL STYLES**.

Or

- i. On the **HOME** ribbon, click the **STYLES DIALOG BOX LAUNCHER**,
- ii. Move your mouse over the style you wish to appear in the **QUICK STYLES GALLERY** a drop down arrow will appear to the right of the style.
- iii. Click drop down arrow and select **ADD TO QUICK STYLE GALLERY**

➤ To Remove a style from the Quick Styles gallery

- i. On the **HOME** ribbon, in the **STYLES** group, right-click the style that you want to remove from the gallery.
- ii. Click **REMOVE FROM QUICK STYLES GALLERY**.

Or

- i. On the **HOME** ribbon, click the **STYLES DIALOG BOX LAUNCHER**,
- ii. Move your mouse over the style you want to remove from the **QUICK STYLES GALLERY** a drop down arrow will appear to the right of the style.
- iii. Click drop down arrow and select **REMOVE FROM QUICK STYLE GALLERY**

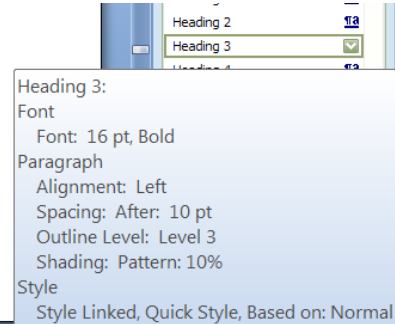




*Removing a style from the Quick Styles gallery does not remove the style from the entries that appear in the **STYLES** task pane. The **STYLES** task pane lists all of the styles in the document.*

Edit A Styles Format

In Microsoft Office Word 2007, Quick Styles are sets of styles that are designed to work together to create an attractive and professional looking document. In most cases, you won't change styles in a Quick Style set because the styles have been designed to complement one another, and it's easier to use a different Quick Style set. But, under certain circumstances, you might want to change the attributes of a style in a Quick Style set.



➤ To edit a style

- Select text that is styled with the style attributes that you want to change. E.G. to change the attributes of the Heading 1 style, select text that has the **HEADING 1** style applied.
- To **VIEW** the attributes of a particular style, click the **STYLES DIALOG BOX LAUNCHER**, and then rest your pointer over a style in the list.
- Format the selected text with the new attributes that you want. E.G. you might decide that you want to change the point size for the Heading 1 style from 16 points to 14 points.
- In the **STYLES** task pane or the **STYLES** group on the **HOME** ribbon, right-click the style that you want to change.
- Click **UPDATE TO MATCH SELECTION**.

*All text with the style that you changed will automatically change to match the new style that you defined. If you changed the styles in a document and the styles are not updating the way you expected, click the **STYLES** Dialog Box Launcher, and then click **STYLE INSPECTOR** to find out whether text was manually formatted instead of formatted by using styles.*

Following Styles

Having Word apply another existing style to a following paragraph increases the speed of document creation by saving the time taken to apply the next style. E.G. a chapter heading may be typed using the Heading 1 style and when **ENTER** is pressed the style is automatically changed to the Heading 2 style for the subheading which will follow.

➤ To specify a style for the following paragraph:

Mouse

- On the **HOME** ribbon, click the **STYLES DIALOG BOX LAUNCHER**,
- In the **STYLE** task pane move mouse over the name of the style you wish to change
- Click the drop down arrow that appears to the right of the selected style and click **MODIFY**
- In the **STYLE FOR FOLLOWING PARAGRAPH** box, select the style to apply to the next paragraph.



Modifying A Style With Style Task Pane

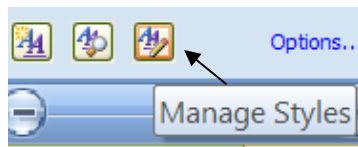
Styles can also be created and updated using the **MODIFY** command from the **MANAGE STYLES** dialog. You can set many more options for the style if you create or redefine it in this way.

A Character Style can only change Fonts and Language formats, but it can be applied to a selection of less than a paragraph.

➤ To access the Style dialog:

Mouse

- i. On the **HOME** ribbon, click the **STYLES** **DIALOG** **BOX**



LAUNCHER,

- ii. Click on the **MANAGE STYLES** button, in the **STYLES** task pane a dialog opens.
- iii. Find the name of the style you wish to change
- iv. Select style and click **MODIFY**

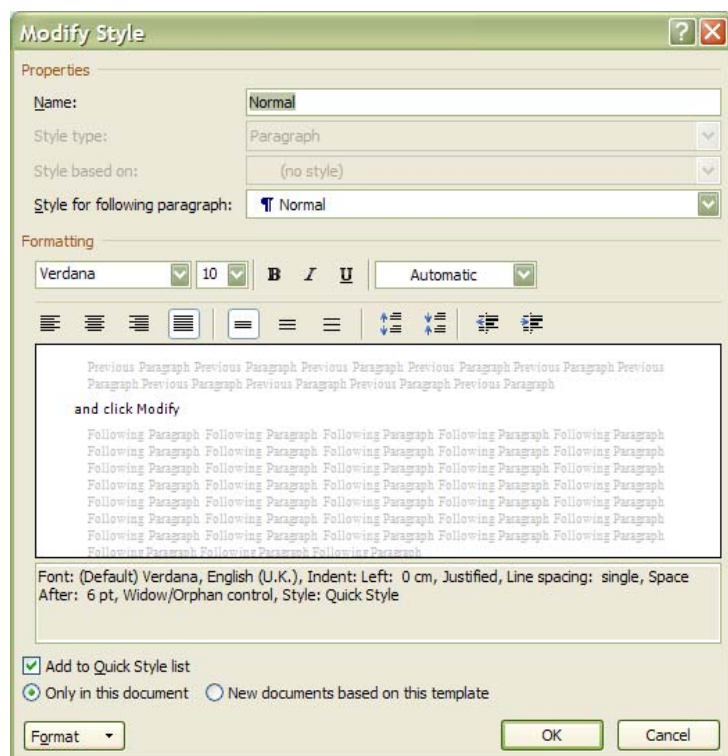
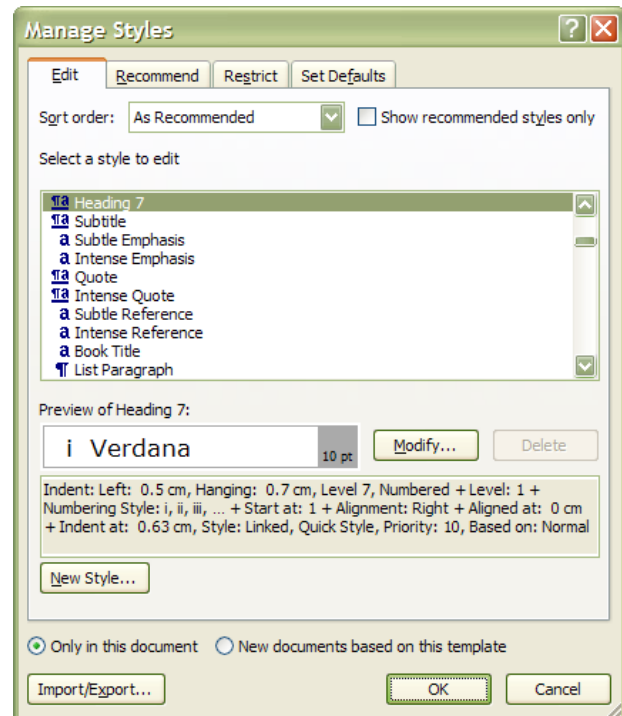
Based On

- v. Type or select the name of an existing style on which to base the style you are creating.

Style For Following Paragraph

- vi. Select the style that you want to apply to the next new paragraph you type following a paragraph formatted with the new style you are creating.

E.G. When creating a Chapter Heading style, you might select the Heading 1 style in the Style For Following Paragraph box. This means that when you press **ENTER** at the end of a paragraph formatted with the Chapter Heading style, Word





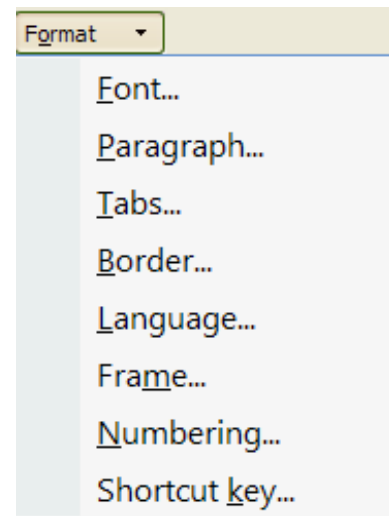
automatically applies the Heading 1 style to the next new paragraph.

Format button

- vii. Click on the **FORMAT** button to define the formatting for the style and assign a short key to apply the style

Selecting any option within the format menu of the modify style dialog will launch the dialog boxes for each of the selected areas. (the button to launch **TABS** dialog is in the **PARAGRAPH** dialog.) This gives you every formatting option available for paragraph or character formatting. And allows you to assign a shortcut key to the style to enable you to apply it easily.

- viii. When all options are determined you can see a preview of the formatted style in the preview area of the dialog.
- ix. When all selections have been made click **OK**.
- x. All paragraphs using the style are automatically updated.



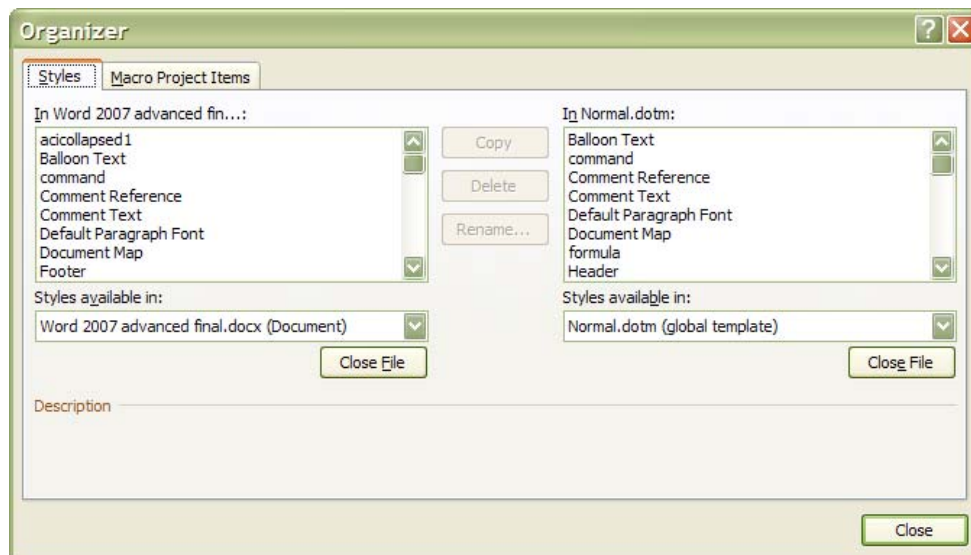
Copying Styles Between Documents

The styles that you redefine, or new ones that you create, can only be used in the current document. Clearly you may want to copy a style into another document, rather than recreating or redefining it from scratch.

➤ **To copy a style from one document to another:**

Mouse

- i. Open the file which currently contains the styles
- ii. Click on the **MANAGE STYLES** button, in the **STYLES** task pane a dialog opens.



- iii. Click on the **IMPORT/EXPORT** button
- iv. Copy items to or from a different template or file; click **CLOSE FILE** to close the active document and its attached template or to close the Normal template. Then click **OPEN FILE**, and open the template or file you want.
- v. Click the items you want to copy in either list, and then click **COPY**



vi. The list of styles on the left-hand side of the dialog belongs to the current document.

To specify the document which will be receiving the new style(s):

- vii. Click on the **CLOSE FILE** button (on the right-hand side of the dialog)
- viii. The button will then change to an **OPEN FILE** button, click on this to select the target document
- ix. Select the styles(s) in the left-hand list, and click on the **COPY** button.

*To select more than one style, click on the first style and then hold down **CTRL** and click on the other required styles. To select all the styles, click on the first, then hold down **SHIFT** and click on the last style. If you copy a style to a file that already contains that style, E.G. Heading 1, you will receive a message asking for confirmation. In addition to copying styles, you can delete or rename styles in either list using the **DELETE** and **RENAME** buttons. When you delete a style, you are asked for confirmation.*

Copying To/From Document Templates

If the document where the styles have been changed was based on a particular Template, the new styles can be copied back **to** the Template. This means that new documents based on the Template will automatically pick up the style changes. However, to update existing documents with changes in the Template, you would have to copy the styles **from** the Template.

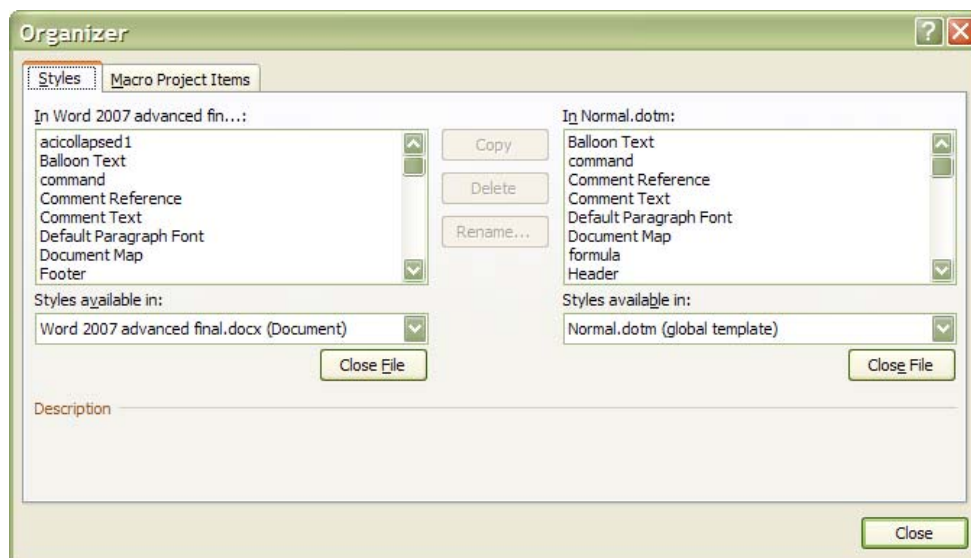
Updating the Template

The procedure for copying style changes in a document back to its underlying Template is a very similar to copying to another document (see previous page).

➤ To update the template with the new styles:

Mouse

- i. Open the file which currently contains the styles
- ii. Click on the **MANAGE STYLES** button, in the **STYLES** task pane a dialog opens.



- iii. Click on the **IMPORT/EXPORT** button



- iv. Word initially assumes that you want to copy the styles to NORMAL.DOTM
To select the underlying document template:
- v. Click on the **CLOSE FILE** button (on the right-hand side of the dialog)
- vi. The button will then change to an **OPEN FILE** button, click on this to select the target template
- vii. Select the style(s) in the left-hand list, and click on the **COPY** button
- viii. You will be prompted for confirmation if the styles you are copying already exist in the template.
- ix. Click on **CLOSE** to close the **ORGANISER** dialog
- x. You will then be asked whether you want to save the changes made to the template. The same prompt occurs when you save and close the current document. It is a final chance to either accept or reject the changes to the document template.

Updating A Document

The method of copying styles from the template back into existing documents is much simpler.

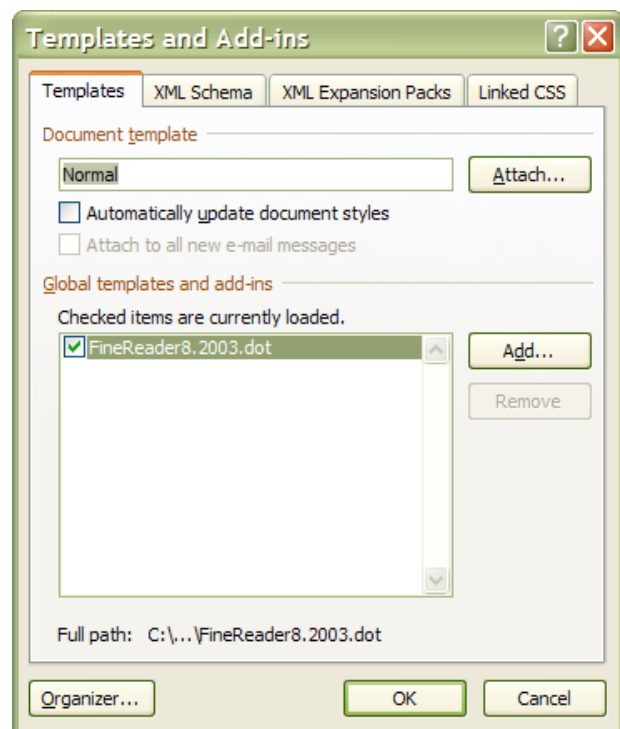
To Update Document Styles With Template Styles:

Mouse

- i. Open the document which needs updating
- ii. Click the **OFFICE BUTTON** and click on **WORD OPTIONS** select **ADD-INS**. Select which add-in to manage from the drop down box near the bottom of the screen (templates) and click **GO** a dialog appears

Manage:

- iii. The name of the underlying document template should appear in the dialog. To copy the styles into the current document:
- iv. Click in the Automatically update document styles check-box
- v. Click on **OK** to return to the document



The styles in the document will be updated and will continue to be updated automatically if any other changes are made to the template in future.



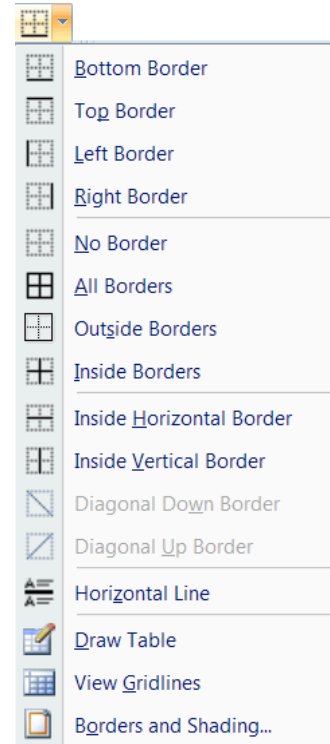
Borders

Borders can be applied to many different objects in Word; E.G. you can add borders to tables, paragraph edges or even whole pages in a document. There are also some automatic formatting keystrokes that will add borders to the cursor position in your document (*See the section on AutoFormatting for more information*).

➤ To add a border to a paragraph:

Mouse

- Select the paragraph.
- Click on the drop down arrow to the right of the **BORDERS** button in the **PARAGRAPH** group on the **HOME** ribbon, displays the palette to the right
- Click on any combination of the border tools to determine which edges of the paragraph are bordered.



The buttons on the palette perform the following functions:

	Applies or removes outside border
	Applies or removes borders both inside and outside
	Applies or removes top border
	Applies or removes left border
	Applies or removes a border horizontally inside a selection
	Applies or removes descending diagonal
	Applies horizontal line
	Applies or removes inside border
	Removes all borders
	Applies or removes bottom border
	Applies or removes right border
	Applies or removes a border vertically inside a selection
	Applies or removes ascending diagonal



Changing The Paragraph Border Width

The width of the border is controlled by the right indent measurement belonging to the paragraph.

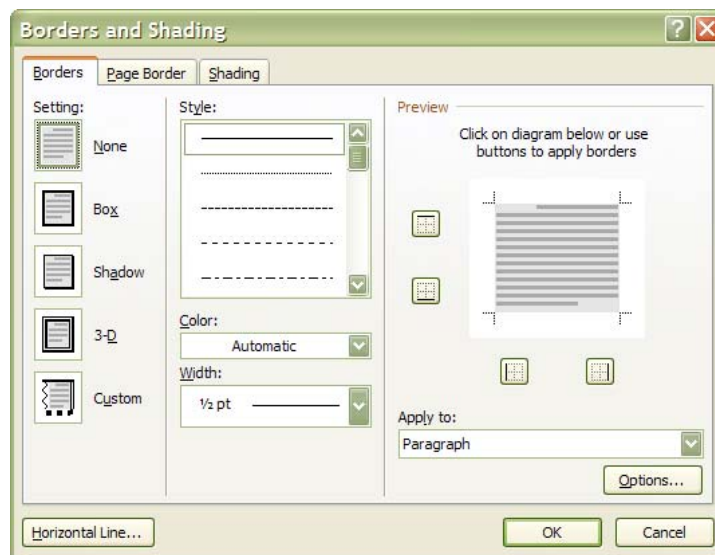
➤ To reduce the width of the border:

Mouse

- i. Click in the paragraph with the border or select the paragraphs if more than one paragraph's borders need changing.
- ii. Drag the indent markers on the ruler to correspond with the new border width.

More Borders Via The Dialog Box

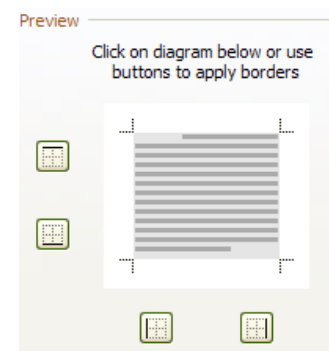
Borders can be added using the borders dialog available from the borders drop down button. Applying borders in this way gives you more options as to line style, shading and so on.



➤ To apply borders using the Borders and Shading dialog:

Mouse

- i. Select the paragraph(s).to be bordered
- ii. Click the drop down arrow to the right of the borders button in the **PARAGRAPH** group and select **BORDERS AND SHADING** the following dialog appears.
- iii. Click on the **BORDERS** tab.
- iv. Choose the required border style
- v. Select a thickness or colour for the border
- vi. Select an option from the left on where to apply the border **OR** Use one of the buttons on the left hand side of dialog to apply different borders top, bottom, left or right





-
- vii. Click **OK** to apply borders to selected text



Defining Styles Automatically

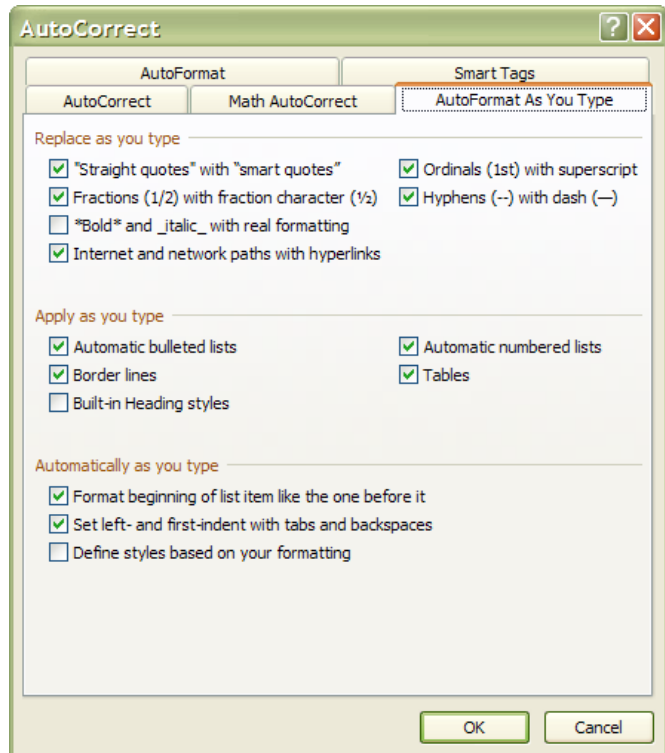
Using autocorrect

To have Word automatically define styles, check **DEFINE STYLES BASED ON YOUR FORMATTING** on the **AUTOFORMAT AS YOU TYPE** tab of the AutoCorrect options.



AUTOCORRECT options are accessed by going to the **OFFICE BUTTON**, **WORD OPTIONS** and then on the **PROOFING** tab on the left the **AUTOCORRECT OPTIONS** button will appear in the **AUTOCORRECT** section on the right.

Styles can also be updated automatically when *manual* formatting is applied to text that is already formatted with a specific style.

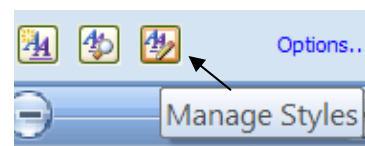


Using the style option

➤ To have Word automatically update a style:

Mouse

- On the **HOME** ribbon, click the **STYLES DIALOG BOX LAUNCHER**,
- Click on the **MANAGE STYLES** button, in the **STYLES** task pane a dialog opens.
- Find the name of the style you wish to change
- Select style and click **MODIFY**
- Select the **AUTOMATICALLY UPDATE** check box.



The Normal style cannot be updated automatically.



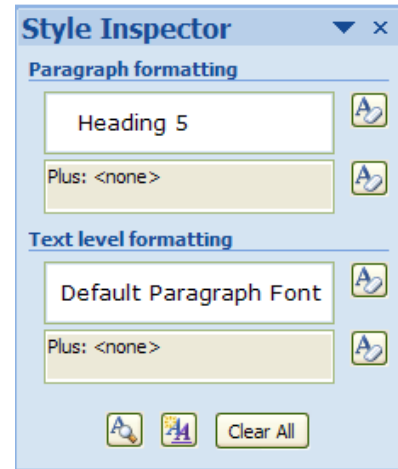
Style Inspector

The style inspector gives you a preview and analysis of the style of any text you happen to click on with options to clear any aspects of the style that don't meet with your approval or to clear all. For a further breakdown click on the reveal formatting button on the bottom left of the window to give a complete breakdown of your style.

➤ To show style inspector

Mouse

- On the **HOME** ribbon, click the **STYLES DIALOG BOX LAUNCHER**,
- Click on the **STYLE INSPECTOR** button, in the **STYLES** task pane a dialog opens.



➤ To reveal formatting

Mouse

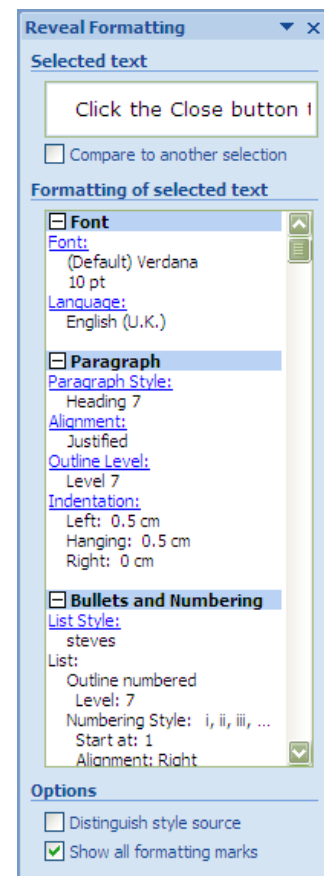
- Open the style inspector
- Click on the button on the bottom left of the window
- The **REVEAL FORMATTING** task pane opens.

Clicking on any of the blue **HYPERLINKS** opens the dialogs to edit any part of that style it is a very useful tool for editing your style.

➤ To close style inspector

Mouse

- Click the cross on top right of dialog



Printing Styles

To print a list of styles from the active document select Styles in the **PRINT WHAT** list box of the File Print dialog box.



DOCUMENT THEMES

Apply A Document Theme

You can quickly and easily format an entire document to give it a professional and modern look by applying a document theme (theme: A set of unified design elements that provides a look for your document by using colour, fonts, and graphics.). A document theme is a set of formatting choices that include a set of theme colours, a set of theme fonts (including heading and body text fonts), and a set of theme effects (including lines and fill effects).

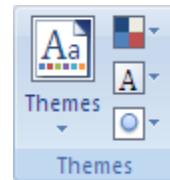
Programs such as Microsoft Office Word, Excel, and PowerPoint provide several predefined document themes, but you can also create your own by customizing an existing document theme, and then by saving it as a custom document theme. Document themes are shared across Office programs so that all of your Office documents can have the same, uniform look.

➤ To Apply a document theme

You can change the document theme that is applied by default in Office programs, such as Word, Excel, and PowerPoint, by selecting another predefined document theme or a custom document theme. Document themes that you apply immediately affect the styles (style: A combination of formatting characteristics, such as font, font size, and indentation, that you name and store as a set. When you apply a style, all of the formatting instructions in that style are applied at one time.) that you can use in your document.

Mouse

- i. On the **PAGE LAYOUT** ribbon, in the **THEMES** group, click **THEMES**. To select a theme.

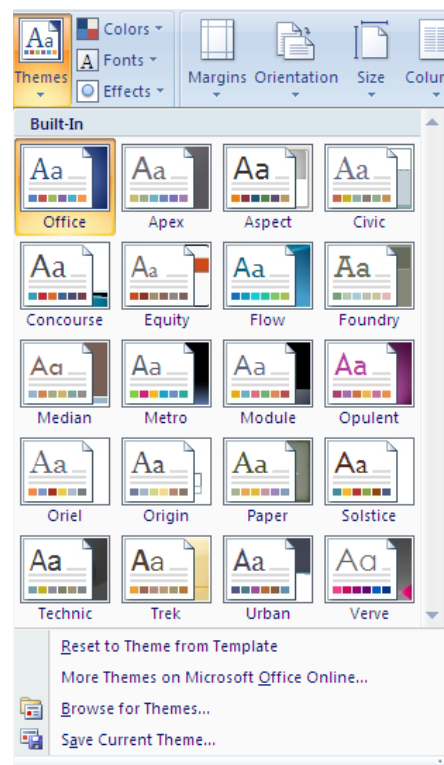


Or

- ii. If a document theme that you want to use is not listed, click **BROWSE FOR THEMES** to find it on your computer or a network location.
- iii. Select a theme to apply it to your current document

*To search for other document themes on Office Online, click **SEARCH OFFICE ONLINE**.*

***CUSTOM** is available only if you created one or more custom document themes. For more information about creating custom document themes.*





Customise A Document Theme

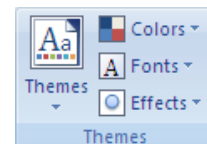
To customise a document theme, you start by changing the colours, the fonts, or the line and fill effects that are used. Changes that you make to one or more of these theme components immediately affect the styles that you have applied in the active document. If you want to apply these changes to new documents, you can save them as a custom document theme.

➤ To customise the theme colours



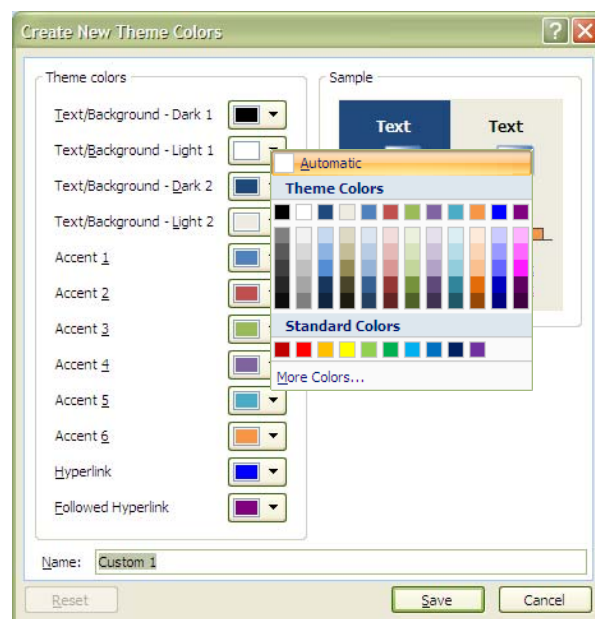
Theme colours contain four text and background colours, six accent colours, and two hyperlink colours. The colours in the **THEME COLOURS** button represent the current text and background colours. The set of colours that you see next to the **THEME COLOURS** name after you click the **THEME COLOURS** button represent the accent and hyperlink colours for that theme. When you change any of these colours to create your own set of theme colours, the colours that are shown in the **THEME COLOURS** button and next to the **THEME COLOURS** name will change accordingly.

- On the **PAGE LAYOUT** ribbon, in the **THEMES** group, click **COLOURS**.
- Click **CREATE NEW THEME COLOURS** the following dialog is displayed
- Under the **CREATE NEW THEME COLOURS** dialog, click the drop down button of the theme colour element that you want to change.
- Select the colours that you want to use.



*Under Sample, you can see the effect of the changes that you make. To see how the colours that you select affect styles that you have applied in your document, click **PREVIEW**.*

- Repeat step 3 and 4 for all of the theme colour elements that you want to change.
- In the Name box, (bottom) type an appropriate name for the new theme colours.
- Click **SAVE**.



*To return all theme colour elements to their original theme colours, you can click **RESET** before you click **SAVE**.*

➤ To customise the theme fonts



Theme fonts contain a heading font and a body text font. When you click the **THEME FONTS** button, you can see the name of the heading font and body text font that is used for each theme font below the **THEME FONTS NAME**. You can change both of these fonts to create your own set of theme fonts.

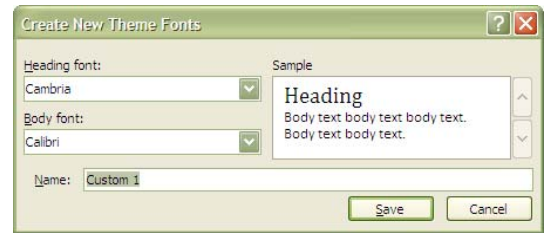
- On the **PAGE LAYOUT** ribbon, in the **THEMES** group, click **THEME FONTS**.



- ii. Click **CREATE NEW THEME FONTS**.
- iii. In the **HEADING FONT** and **BODY FONT** boxes, select the fonts that you want to use.

The sample is updated with the fonts that you select.

- iv. In the **NAME** box, type an appropriate name for the new theme fonts.
- v. Click **SAVE**.

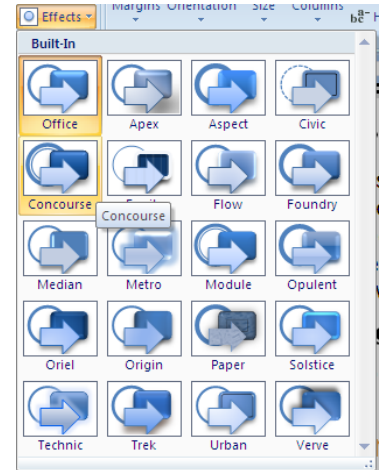


➤ To select a set of theme effects



Theme effects are sets of lines and fill effects. When you click the **THEME EFFECTS** button, you can see the lines and fill effects that are used for each set of theme effects in the graphic that is displayed with the **THEME EFFECTS** name. Although you cannot create your own set of theme effects, you can choose the one that you want to use in your own document theme.

- i. On the **PAGE LAYOUT** ribbon, in the **THEMES** group, click **THEME EFFECTS**.
- ii. Select the effect that you want to use.



➤ To save a document theme

Any changes that you make to the colours, the fonts, or the line and fill effects of a document theme can be saved as a custom document theme that you can apply to other documents.

- i. On the **PAGE LAYOUT** ribbon, in the **THEMES** group, click **THEMES**.
- ii. Click **SAVE CURRENT THEME**.
- iii. In the **FILE NAME** box, type an appropriate name for the theme
- iv. Click **SAVE**.

A custom document theme is saved in the Document Themes folder and is automatically added to the list of custom themes.



COLUMNS

You can set pages in documents up where the text is laid out "newspaper style" in columns. Word will automatically "section off" the area where the columns are active, so you will see continuous section breaks (see section breaks) appear above and below the column area.

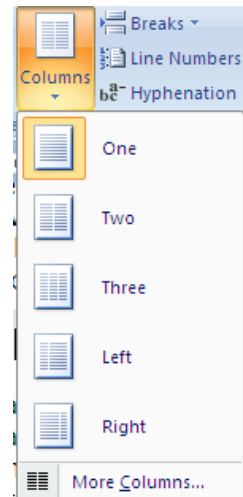
Newspaper Columns

A columnar layout can either be tabular (where the information is divided both vertically and horizontally) or snaking columns, which have only a vertical division. The 'snaking' effect means that once column 1 is full, the text "snakes" on to the top of the next column, just like in a newspaper.

➤ To set up newspaper columns:

Mouse

- i. Select the text you wish to have in columns **OR** click at the point you wish the columns to start.
- ii. Go to the **PRINT LAYOUT** ribbon and then to the **PAGE SETUP** group. Click on the **COLUMNS** button
- iii. Select the number of columns of columns you wish from the displayed list.

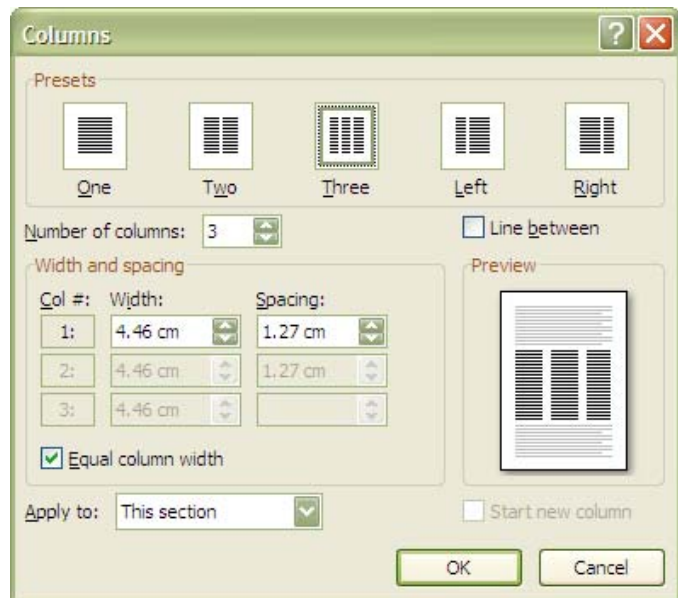


OR

- iv. Click on **MORE COLUMNS** to display the **COLUMNS** dialog box.
- v. Type in the number of columns required, e.g. 3, adjust the space between columns if necessary (the default is 0.5 inches).

You have the choice of having lines separating the columns. Lines will be the length of the longest column. Lines will only be printed if there are two or more columns.

- vi. Click on the box at **LINE BETWEEN**.
- vii. To see the line use **PRINT PREVIEW** or **PRINT LAYOUT** view.



If you wish to have columns of different widths ensure you untick the **EQUAL COLUMN WIDTH** checkbox

- viii. When all options are selected click ok to apply your columns



Entering Text

Once your document has been set up with a columnar layout, you can enter text in the usual way. Make sure you are in **PRINT LAYOUT** View; otherwise you will not see a true representation of how your document will print out.

Copying, Moving And Deleting Text Between Columns

Text can be easily moved and copied between columns in Word once they have been set up.

➤ To Move, copy and delete text between columns:

Mouse

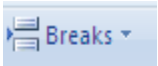
- i. Select the text to be copied and copy it with your preferred method.
- ii. Place the **INSERTION POINT** at the point where you wish to copy it to and press the Paste icon.
- iii. Select the text to be moved and cut it with your preferred method.
- iv. Place the **INSERTION POINT** at the point where you wish to copy it to and press the Paste icon.
- v. Select the text to be deleted and press the **DELETE** key..

Column Breaks

If you want to end a column before the bottom of the page, you will need to insert a column break.

➤ To insert a column break:

Mouse

- i. Click on **BREAKS** from the **PAGE SETUP** group on the **PRINT LAYOUT** tab 
- ii. Select **COLUMN BREAK** the break will be inserted. It can be deleted just like a page break or any other character with the **DELETE** key on the keyboard.

Or

Keyboard

- iii. Press **CTRL SHIFT ENTER**.

This will force a new column to appear for you to use. It behaves much like a forced page break. Just imagine each column is like a separate page and column breaks rather than page breaks are used to end that column and allow you to the top of the next.

*In **DRAFT** view, columns are display as one column continuing down the page. Each time there is a snap to a new column this is shown as a dotted line with column Break labelled on it. If you try to use the columns button in this view, Word will change you to **PRINT LAYOUT** view.*



SECTIONS

Dividing a document into sections allows you to apply different page set-up options in different pages of your document. E.G. you might want page 3 of your document in landscape because it contains a very wide table, but the rest of the document is a report that needs to be in portrait orientation.

You may want different margin sizes in different parts of your document or page numbering restarting in different formats at different points. Columns use sections so that each section can be treated differently from the others.

Word sometimes adds the section breaks to a document for you, especially when you change the format for a selection.

*On the far left corner of the status bar there is an indicator that tells the user which page and in what section the insertion point is currently working.
E.G.: Page 13 Section 3.*

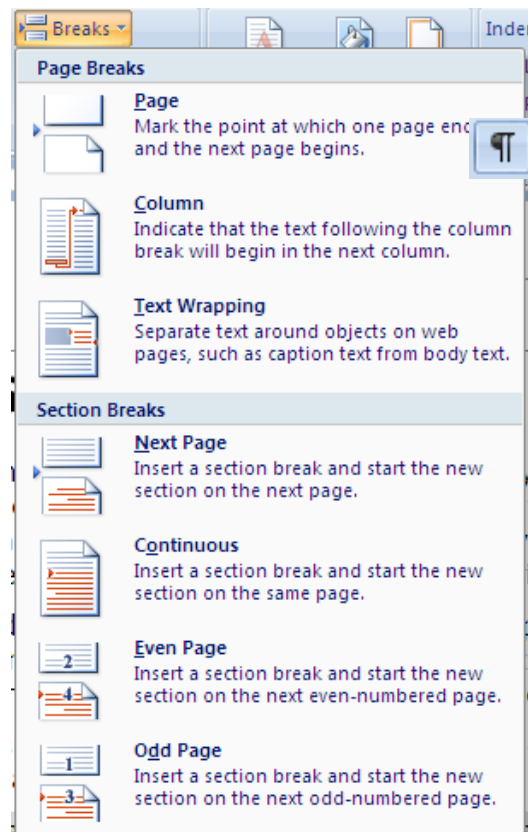
Section Breaks

There are three types of break that will be examined here.

In **PRINT LAYOUT** view, breaks are invisible unless you **SHOW/HIDE CHARACTERS**. This feature lets you see all the special characters that mark formatting you have carried out other than text formatting. That is – spaces, carriage returns and tabs as well as breaks. You will also see other little symbols to indicate such things as table cells. To see the characters, click on the **SHOW/HIDE CHARACTERS** button. On the **HOME** ribbon, **PARAGRAPH** group.

*A page break is **not** a section break*

You can also switch to **DRAFT** view and see breaks without activating other commands but this view can be confusing, especially when working with columns.



Continuous Section Breaks

Use the continuous section break to effectively make a fresh start in your document. Whatever kinds of formatting and other items went before – columns, fields entered, styles etc., a continuous break makes the section above it just that, a section. It also allows you to change the page set-up options for that section only without affecting the whole document.

Next Page Section Breaks

Inserts a section break, breaks the page, and starts the new section on the next page. This feature can be used E.G. to insert different headers and footers in the new



page

section.



Odd Page And Even Page Section Breaks

Useful when your document is set up with double-sided printing and mirror margins, these section breaks allow you to determine whether the next page should be odd (print on the right-hand side of the double-page) or even (print on the left-hand side of the double-page).

What Is Stored Within A Section?

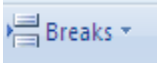
A section can have its own unique headers and footers, margins and page orientation. It may also have a different number of snaking columns to the rest of the document.

Creating A Section Break

Sometimes Word automatically creates section breaks for you. E.G. when you make one of your pages landscape, or if you format some of the text to be displayed in a different number of columns. Otherwise, you have to create the section break manually.

➤ To create a section break:

Mouse

- i. Click on **BREAKS** from the **PAGE SETUP** group on the **PRINT LAYOUT** ribbon 
- ii. Select from the menu that appears. 2007 gives a little explanation by the side of each option.
- iii. The section break will appear.
- iv. Select **NEXT PAGE** if you want the section start to be on the next page,

Or

- v. Choose **CONTINUOUS** if the section should run through on the same page.

Or

- vi. Choose **ODD PAGE/EVEN PAGE** to determine which side of the book the new section should begin on.

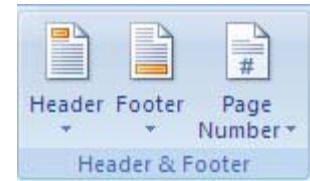
The section break is displayed just before the new section:

Word initially copies the header and footer, margin settings and page orientation into the new section. The margin and orientation settings can be easily changed from the Page Set-up dialog, since Word will assume you want to only affect the current section.



Handling Headers And Footers

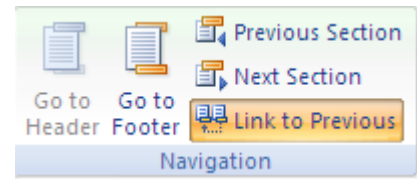
The headers and footers in the new section will be linked to the previous section. This means that if you change the header or footer in the first section, those in the second section will automatically change.



➤ To unlink a header/footer from the previous section:

Mouse

- Position the insertion point in the **second** section
- Choose **HEADER** or **FOOTER** from the insert ribbon **HEADER & FOOTER** group and select **EDIT HEADER AND FOOTER** from the bottom of the displayed options
- Click on the **LINK TO PREVIOUS BUTTON** to turn off the link to deselect the highlighted button



The link between any other two sections can be broken in the same way. However sometimes you may want to keep the link, particularly if you are working in a Master Document - see the section on Master Documents later in this manual.

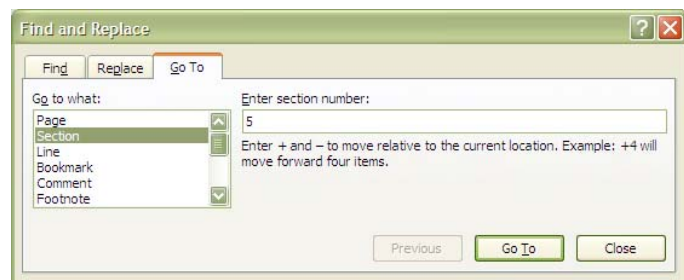
Moving Between Sections

You can quickly move from one section to another by using the **F5** key. The **GOTO** tool

➤ To move to a specific section:

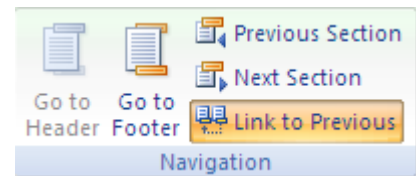
Keyboard

- Press **F5** to open the goto dialog.
- Click on **SECTION**, then type in the section number
- Click on the **GO TO** button.



Or

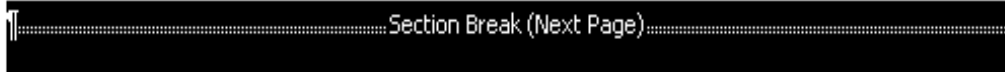
- Choose **HEADER** or **FOOTER** from the insert ribbon **HEADER & FOOTER** group and select **EDIT HEADER AND FOOTER** from the bottom of the displayed options.
- Go to the **DESIGN** ribbon, and use the navigation buttons to move from section to section.





Removing A Section Break

You may need to merge two sections into one by deleting a section break.



➤ To delete a section break:

Mouse

- i. Select the section break to be removed
- ii. Press **DELETE**

The two sections would then become one section. It is important to note that this new section inherits all the page set-up, column and header/footer settings from the second of the two sections.

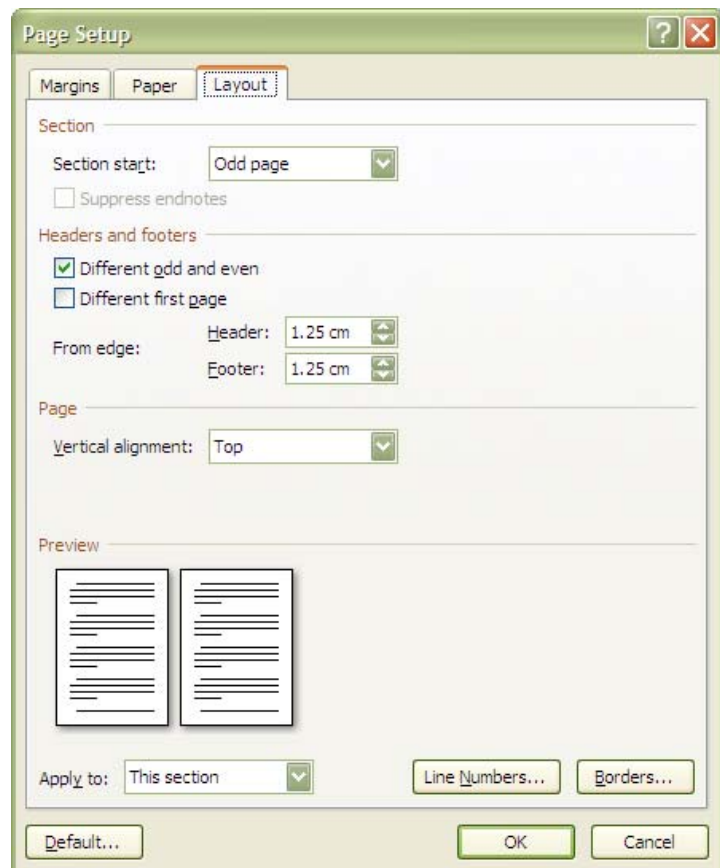
Section Properties

In **PRINT LAYOUT** view and with the **SHOW/HIDE CHARACTERS** feature active, double click any of the continuous section breaks in the document. The **PAGE SET-UP** dialog box will appear, usually displaying the **LAYOUT** page. To switch to margins options, click the **MARGINS** ribbon.

You can now adapt the print layout, margins and other options for the section only, as long as you do not change **APPLY TO:** This section. Click the **LINE NUMBERS...** button on the layout page for options on adding a number for each line of text in the section.

➤ To Change the properties for a section:

- i. Double click the section break. The **PAGE SET-UP** dialog will appear.
- ii. In the **PAGE SET-UP** dialog box, set the options you wish to change
- iii. Click **OK**. Your changes will have affected only the section you are in.





SECTION 3 OUTLINING

By the end of this section you will be able to:

- ✦ View a document outline
- ✦ Outline a document using styles
- ✦ Promote and demote outline levels
- ✦ Expand and collapse outline levels
- ✦ Move and copy outline levels
- ✦ Use outline numbering
- ✦ Apply preset numbering to headings in a document
- ✦ Customise the numbering style for headings
- ✦ Remove heading numbering



DOCUMENT OUTLINES

What Is A Document Outline?

An outlined document is one with a structure of headings, at various levels, with associated text. E.G. the chapter of this manual could be presented in outline.

When To Use Outlining

Outlining is most useful on larger documents or ones with a definable structure. An outlined document is easy to reorganise and restructure.

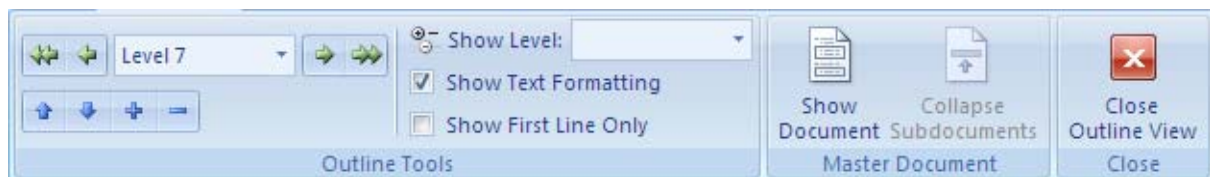
Word also provides standard styles for the levels of an outline, which can be redefined for ease and speed of formatting.

Tables of contents can be readily generated from outlines and the levels of the outline numbered in various ways.

Outlining A Document

Word provides a special view and nine heading level styles to create outlines. Outline view contains an outline bar to help quickly perform outlining tasks such as changing and displaying various heading levels.

Existing documents can be outlined or a document outline can be created in a new document.



➤ To create an outline in a new document:

Mouse

- Create a new document using your preferred method.
- Choose **OUTLINE** view from the **STATUS BAR VIEW** buttons OR go to the **VIEW** ribbon and select **OUTLINE** from the **DOCUMENT VIEWS** Group.
- Type a heading. Word automatically formats the text as heading level 1.
- Press **ENTER** and then type the text for the next heading or body text paragraph. The new entry will have the same level as the previous entry.
- To change the heading level, do one of the following:

To create a	Click	Press
Lower-level heading - Demote		ALT SHIFT →
Higher-level heading - Promote		ALT SHIFT ←
Paragraph of body text from a heading		ALT SHIFT 5 On the numeric keypad

- Repeat steps 4 and 5 for each heading and body text paragraph in the outline.



Outlining An Existing Document

Outline an existing document to view its organisation or quickly change its structure.

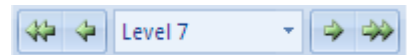
➤ To outline an existing document:

Mouse

- i. If the document is not in outline view, choose go to the **VIEW** ribbon and select **OUTLINE** from the **DOCUMENT VIEWS** Group. The text of the document is initially paragraphs of body text.
- ii. Select a paragraph to change into an outline heading.
- iii. Change the heading level (see table previous).
- iv. Repeat steps 2 and 3 for each heading.

Or

- v. Select a paragraph to change into an outline heading.
- vi. Use the drop down box available between the **PROMOTE/DEMOTE** arrows to apply a specific level of heading to paragraph.



In all other views view, apply heading level styles like any other style.

Using An Outline

➤ To show heading levels:

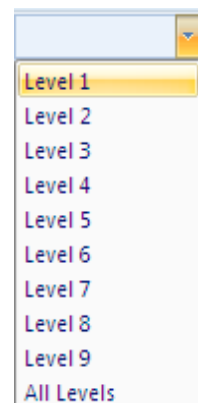
Mouse

- i. On the **OUTLINE** ribbon Use the drop down arrow on the **SHOW LEVEL** box and click **SHOW ALL LEVELS** or press **ALT SHIFT A** to show all heading levels and text.

Showing Text

Text can be expanded or collapsed below a certain level.

➤ To expand or collapse text:



Mouse

- ii. Position the insertion point in a paragraph and click the plus button on the Outline ribbon to expand text below the heading or the minus button to collapse text below the heading.

Moving Headings And Body Text In An Outline

Moving headings in an outline can quickly restructure a document. When a heading is moved, all subheadings and body text under that heading move with it, if the subheadings and body text are collapsed under the heading.

➤ To move headings:



Mouse



i. Drag the heading symbol, or body text symbol, at the left of the heading, or text, up or down to the new position or click the **MOVE UP** or **MOVE DOWN** buttons on the **OUTLINE** ribbon. Word moves all subtext with the heading.

Or

Keyboard

- i. Position the insertion point in the heading.
- ii. To prepare the heading to be moved, collapse the heading (see above).
- iii. To move the heading above the preceding paragraph, press **ALT SHIFT ↑**.
- iv. To move the heading below the following paragraph, press **ALT SHIFT ↓**.



Outline Numbering

Outline numbering allows you to create multi-level lists. You can either apply a list format to normal text or use special outlining for text that has styles attached to it. The example below shows what can be achieved with outline numbering.

- 1) Word '2002 advanced course topics include:
 - a) Advanced table features
 - i) Drawing a table
 - ii) Adjusting column widths and row heights
 - iii) Formulae in tables
 - b) Sections
 - i) Why use sections?
 - ii) Dividing a document into sections
 - c) Styles

Applying A Multi-Level List

You can apply lists using Word's automatic numbering tools that have many different list levels. This is useful if the list you are creating has sub-points which need to line up properly. Word will initially use the top level style for all list items. Use the keyboard to demote and promote items to the required levels.

➤ To apply a multi-level list:

Mouse

- i. Type the list one line under the other.
- ii. If you want blank lines of space between list items select the lines and use the **SPACE AFTER** setting in the **PARAGRAPH** dialog.
- iii. Use the drop down arrow to the right of the **MULTI-LEVEL NUMBERING** button to see a selection of multi-level numbering styles after making a selection click to apply style to highlighted list.



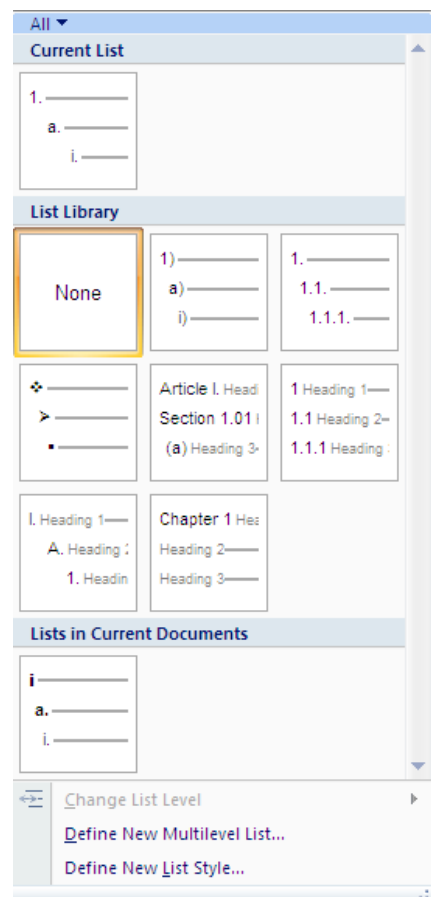
➤ To promote an item:

Mouse

- i. Position the cursor somewhere in the paragraph, or if you want to demote several paragraphs, select them and click the indent button in the paragraph group or press the **TAB** key.

Or

- ii. Use the drop down arrow to the right of the multi-level numbering button and near the





bottom choose **CHANGE LIST LEVEL** and select a new level for your list.

➤ **To demote an item:**

Mouse



- i. Position the cursor somewhere in the paragraph, or if you want to demote several paragraphs, select them and click the outdent button or hold down the **SHIFT** and **TAB** key.

Or



- i. Use the drop down arrow to the right of the multi-level numbering button and near the bottom choose **CHANGE LIST LEVEL** and select a new level for your list.

HEADING NUMBERING

If you use the standard Heading Styles in a document, you can then apply preset or customised numbering to all the Heading Level paragraphs. Numbering can be applied in any of Word's standard views (Draft, Print layout or Outline).

Before you apply Heading Numbering, it may be advisable to apply the Heading Level Styles to the appropriate paragraphs. If you subsequently change a paragraph from one Heading style to another, E.G. from heading 1 to heading 2, the numbering will automatically update.

To Define A New Multi Level List

If none of the multi level lists suit your purposes it is possible to define one of your own with many options all in one place to set the indents and number styles required for your document

Level

The **LEVEL** field on the left of the dialog determines which Heading level Numbering you are modifying. To select a different level, either scroll up or down or click on the required level. Initially, Word always defaults to Level 1.

Number Style

The **NUMBER STYLE:** field controls the style of numbering, whether it is Arabic, Roman numerals, words or bullets. These styles are selected from the drop-down list. You can also specify what text (if any) should appear immediately before and after the number by adding it in the **NUMBER FORMAT** field, and you can change the Font of the number. If you don't want any numbering on a specific level, choose None from the **NUMBER STYLE:** drop-down.

The **START AT:** field enables you to specify if the numbering should start at something other than one.

Previous Level Number

If you are creating a Legal or similar style, you can choose to make Levels 2-9 include the numbering of the previous level. E.G. if Level 1 style is 1, you can make Level 2 appear as 1.1. This option is not available for Level 1, as Level 1 has no previous level.

Number Position

In this section, you can choose the alignment of the numbered text and where you want the numbers aligned. The Text position can be used to specify a precise measurement between the number and the text.

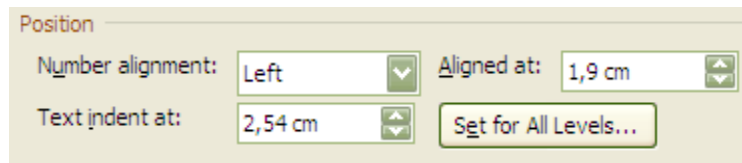
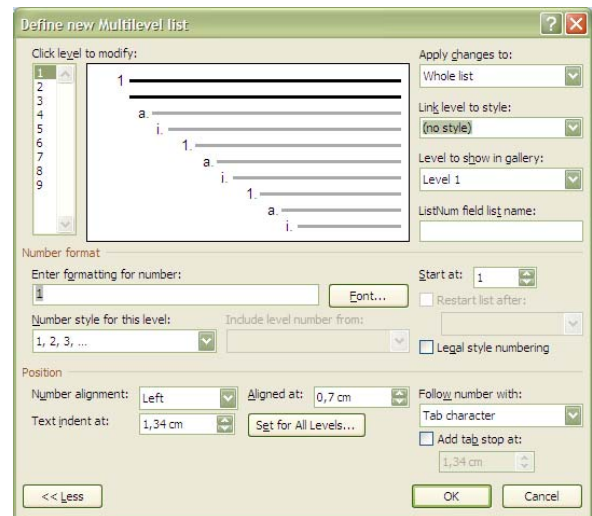


➤ To define new list

Mouse



- i. Use the drop down arrow to the right of the multi-level numbering button and near the bottom; choose **DEFINE NEW MULTI-LEVEL LIST** a dialog (above) will appear.
- ii. Select a level to modify (1-9)
- iii. Click the drop-down list arrow to the right of the **NUMBER STYLE** box. Word offers a variety of different numbering styles for lists, standard Arabic numbers, Roman numerals and so on.
- iv. Click on the required style from the displayed list.
- v. Click on the **FONT** button. The **FONT** dialog opens allowing you to select font options for the selected number style.
- vi. Add other characters to the **ENTER FORMATTING FOR NUMBER** text box to enhance your number style. Use this option to add extra digits to numbers (e.g. if you want extra decimal places) or to add prefix and suffix characters (e.g. the word "Item", -dash etc.).



Position

- i. Use the **NUMBER ALIGNMENT** drop down box to allow a change in alignment of the numbers to left, right or centre.
- ii. Either enter a number or use the spin buttons to set the indent for the number or character for this level.
- iii. Either enter a number or use the spin buttons to set the indent for the text you will type at this level (where you want your text to start).
- iv. If you want the same set of indents for all levels then click the **SET FOR ALL LEVELS** button the indents chosen will be applied for all levels within your list.
- v. You may now work through the levels selecting the alignment, number style and formatting for as many levels as you would use. Click **OK** to complete and create your new multi level list

Remove Heading Numbers

➤ To remove Heading Numbers from the whole document:

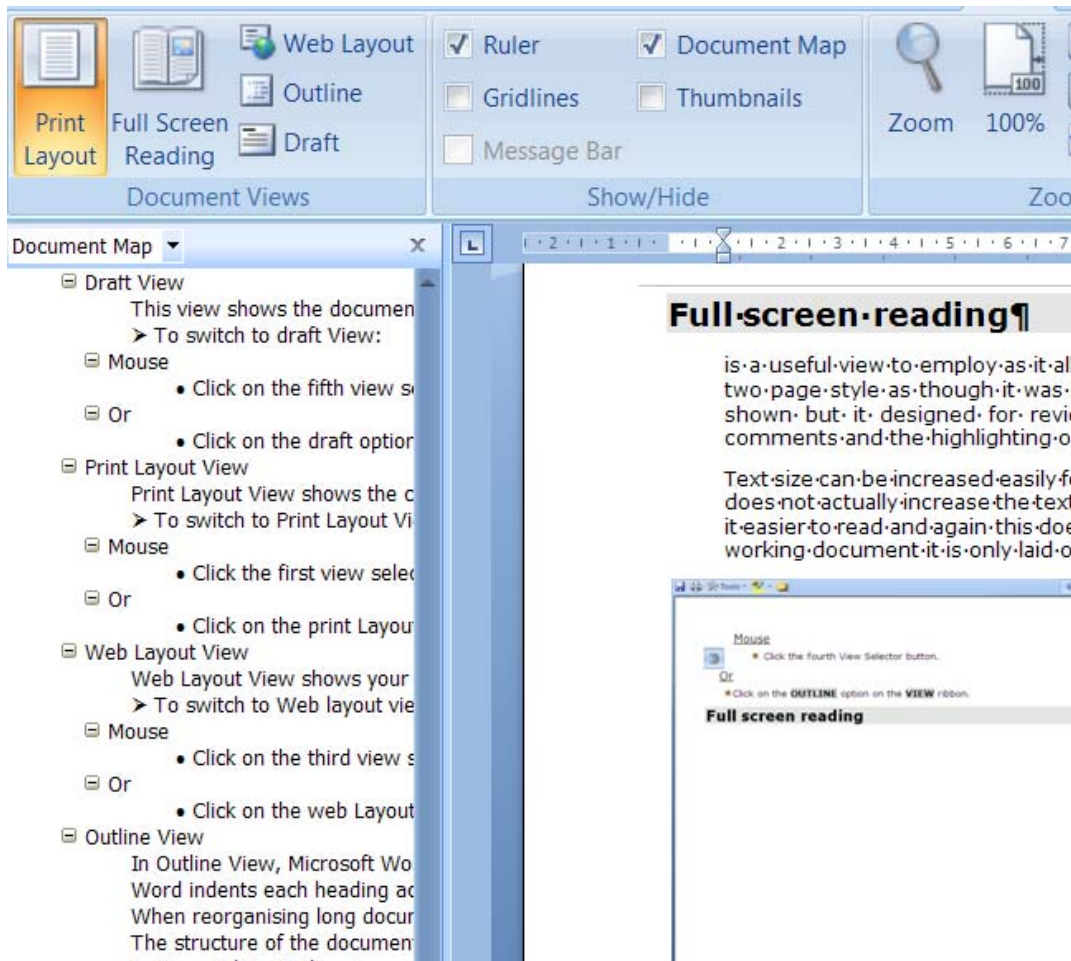
Mouse

- i. Select the heading style you wish to remove the numbers from
- ii. Select the highlighted numbering button on the home ribbon and select none from the options displayed.



DOCUMENT MAP

The Document Map is a separate pane that displays a list of headings in the document. Use the Document Map to quickly navigate through the document and keep track of your location in it. When you click a heading in the Document Map, Word jumps to the corresponding heading in the document, displays it at the top of the window, and highlights the heading in the Document Map. You can show or hide the Document Map at any time.



➤ To switch to the Document Map:

Mouse

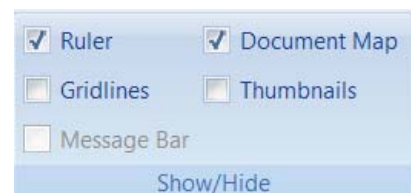
- Click the check box for **DOCUMENT MAP** on the **VIEW** ribbon in the **SHOW/HIDE** group.

➤ To use document map

- Collapse or expand headings with the plus signs or minus signs.
- Scroll and click on a particular piece of text to take you to that specific location.

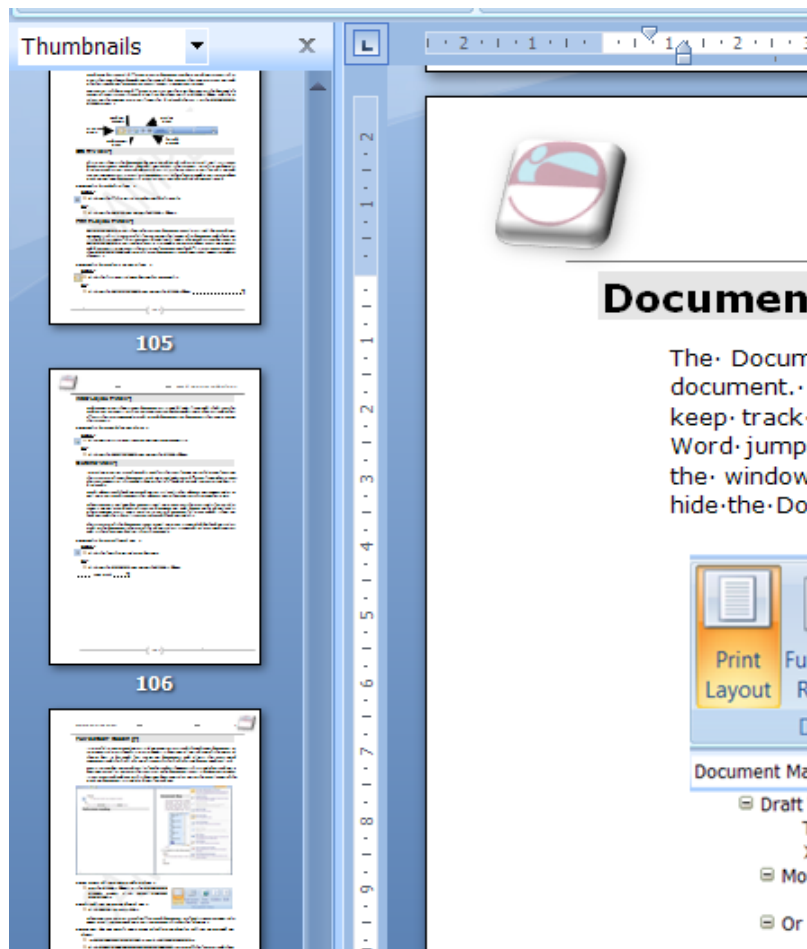
➤ To view thumbnails

- To allow you to navigate in a different way, click on the drop down arrow to the right of where it says **DOCUMENT MAP** in the pane and select **THUMBNAI**LS.





- ii. Navigate by page instead (see following picture)



Changing The Level Of Detail

In the Document Map, you can display just the headings you want. E.G. to see a high-level overview of the document's structure, you can "collapse" (or hide) the subordinate headings. When you are ready to see the details again, display the subordinate headings.

➤ To hide/show document map levels:

Mouse

- i. Click the check box for **DOCUMENT MAP** on the **VIEW** ribbon in the **SHOW/HIDE** group.
- ii. To collapse the subordinate headings under a heading, click the minus sign (-) next to the heading.
- iii. To display the subordinate headings under a heading (one level at a time), click the plus sign () next to the heading.

*To display only the headings below a specific level, right mouse in the **DOCUMENT MAP** and then choose a number on the shortcut menu. E.G. click **SHOW HEADING 3** to display heading levels 1 through 3.*



➤ **To adjust the size of the Document Map:**

Mouse

- i. Point your cursor to the right edge of the pane. The mouse pointer should change to a resizing pointer.
- ii. Click and drag left or right to enlarge/reduce the width of the pane.

If your headings are too long to fit in the Document Map, it's not necessary to resize the pane, just move the pointer over a heading to view the entire heading.

➤ **To close the Document Map:**

Mouse

Click the check box for **DOCUMENT MAP** on the **VIEW** ribbon in the **SHOW/HIDE** group. or double-click the right edge of the pane. Or click on the cross in the top right hand corner of the pane.



SECTION 4 USING MASTER DOCUMENTS

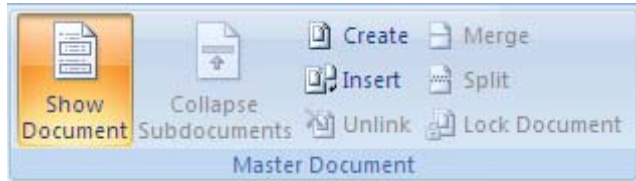
By the end of this section you will be able to:

- ✦ Use Master document view
- ✦ Create a new Master document
- ✦ Convert an existing document into a Master
- ✦ Insert sub-documents into a Master document
- ✦ Split, merge and remove subdocuments
- ✦ Allow multiple-user access to a Master document
- ✦ Format Master documents.
- ✦ Print Master documents



MASTER DOCUMENTS

A master document helps you organise and maintain a long document by dividing it into several subdocuments. With a master document, you can work either with the entire long document or with any individual subdocument. You can create a table of contents and an index in the master document, which refers to all the subdocuments, and you can build cross-references between two documents.

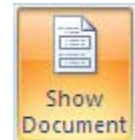


You can work with a master document either in Master Document View or Draft View. If you want to work on the entire master document as if it were a single document, work in Draft View. Master Document View, however, is used to create, insert, open and reorganise subdocuments in the long document.

➤ To change to Master Document view:

Mouse

- Select **OUTLINE** from the **VIEW** ribbon. Click on the **SHOW DOCUMENT** icon to reveal the buttons below.



A brief description of each of the tools is listed below:

	Collapse Subdocuments
	Create a Subdocument
	Remove a Subdocument
	Insert a Subdocument
	Merge two Subdocuments
	Split a Subdocument
	Lock or Unlock the selected document

It is important to note that the total size of a master document and all of its subdocuments cannot exceed 32MB, excluding graphics. Also, a master document cannot contain more than 8 subdocuments.

Setting Up A Master Document

There are three ways to set up a master document: you can create **A NEW MASTER DOCUMENT** from scratch; **CONVERT AN EXISTING DOCUMENT** into a master document; or **COMBINE EXISTING DOCUMENTS** to create a new master document. Whichever method you use, you need to be working in Master Document view.



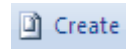
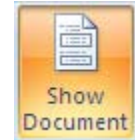
Creating A New Master Document

Use this procedure for creating a new master document from scratch

➤ To create a new master document:

Mouse

- i. Open a **NEW** document and switch to **OUTLINE** view
- ii. Click on **SHOW DOCUMENT** for the document
- iii. Create subdocuments from the outline by clicking on the **CREATE** button.
- iv. Move within the main document to create other subdocuments.
- v. Save the master document as you would with any other document. All of the subdocuments will be saved in the same location as the master with default names. (First letter of master and subdocument number)



Creating A Master Document Outline

The outline is simply a list of the topics that your overall document is going to discuss.

When you create the outline for the Long Document, you must use the standard Heading styles (Heading 1-9). It is a good idea to leave a couple of blank lines at the start of the outline, since this will leave space for a table of contents, and an overall document title.

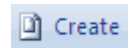
Create the Subdocuments from the Outline

Each outlined topic together with its subtopics can be divided into a subdocument.

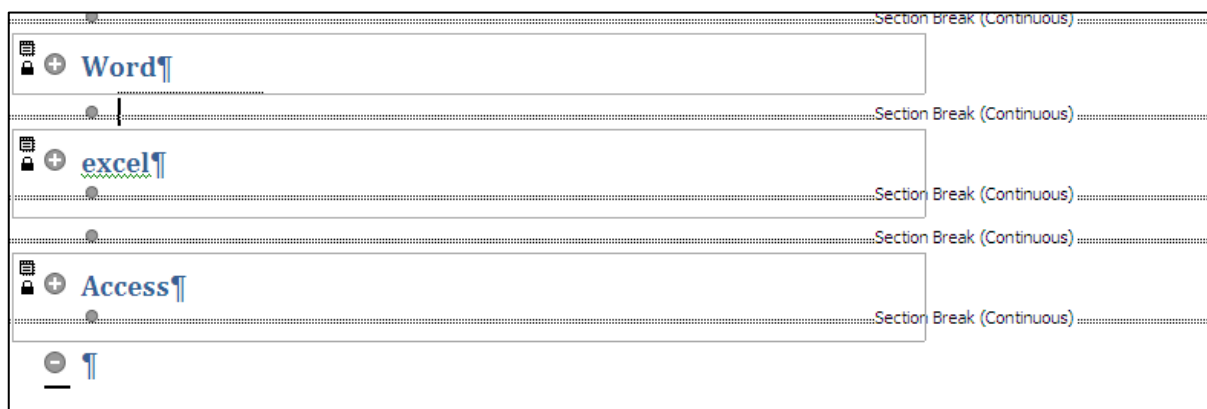
➤ To create subdocuments using the master document outline:

Mouse

- i. Select the headings and text that you want to divide into a subdocument.
- ii. Click on the **CREATE** Subdocument button.



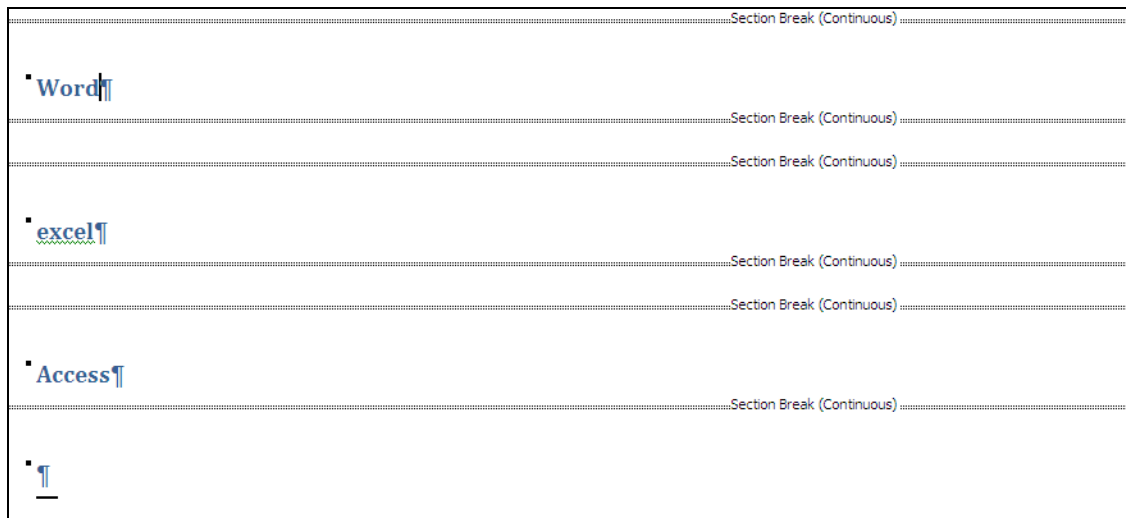
Outline view



- iii. Word then encloses each subdocument in a box, displaying a Subdocument icon in the upper-left corner of each box. The subdocuments are also separated with section breaks - the breaks can be seen in **DRAFT** view.



Draft view



Saving The Master Document

To save the master document and all of the subdocuments, save the Master Document in the normal way. When you assign a filename and click on **OK**, Word automatically creates filenames for all the subdocuments. It uses the first character of the heading that begins each subdocument. E.G. if you have a subdocument that begins with "Chapter 1", the resulting filename will be "CHAPTER1.DOC".

If a subdocument filename is going to conflict with an existing file, then Word uses part of the heading text and appends a number for the filename, E.G. "CHAP1234.DOC".

Converting An Existing Document Into A Master Document

It may be advantageous in some situations to convert existing files to be used as master and sub documents.

➤ To change a document into a master:

Mouse

- i. In your existing document, switch to **OUTLINE** view and click on **SHOW DOCUMENT** to access the the commands.
- ii. Use **OUTLINE** view to **PROMOTE** and **DEMOTE** the heading styles as necessary
- iii. Then highlight the necessary text and create the subdocuments from the outline and save the master document. These two processes are covered in the previous section, "Creating a New Master Document".

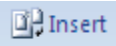


Inserting Subdocuments Into A Master Document

You may already have several documents which you want to combine together to make a master document.

➤ To incorporate documents into a master:

Mouse

- i. Open a new or existing document and switch to **OUTLINE** view, click on the **SHOW DOCUMENT** button.
- ii. Add some space at the start of the document (press **ENTER** a couple of times) if you wish to leave room for other items.
- iii. Position the insertion point where you want to insert the first document
- iv. Click on the **INSERT SUBDOCUMENT** button and select the file from the **INSERT** Subdocument dialog. 
- v. Repeat these last two steps for all the subdocuments. When you save the Master Document, all the subdocuments retain their original filenames and locations

Avoid inserting a subdocument at the top of the Master Document. Try to leave a few blank lines, as this will make it easier to include a table of contents and a title page.

Opening A Subdocument

You can either open a subdocument from within the master document or as a completely separate file in the normal way.

➤ To use the master to open a Subdocument:

Mouse

- i. Open the **MASTER** document and switch to **OUTLINE** view
- ii. Double-click on the subdocument icon belonging to the subdocument you want opened

An advantage to opening a file this way, is that you don't have to remember what the file is called or where it is saved.

Renaming A Subdocument

If you want to rename a subdocument or save it in a different location, you must open the subdocument from within the master.

➤ To rename a subdocument:

Mouse

- i. Open the master document and switch to **OUTLINE** view, click on the **SHOW DOCUMENT** button.
- ii. Double-click on the subdocument icon to open the subdocument you want renamed
- iii. Use the **OFFICE BUTTON, SAVE AS, WORD DOCUMENT** button to open the **SAVE AS** dialog to rename and relocate the subdocument.
- iv. Close the subdocument, then **SAVE** and **CLOSE** the master document



Do not use File-Manager to rename or move subdocuments, if you do, it breaks the link between the master document and the subdocument.

Splitting A Subdocument

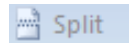
You can split a subdocument if it becomes too large, this would also allow multiple authors to work on parts of the subdocument.

Conversely, you can merge subdocuments if you want to combine small files.

➤ To split a subdocument in two:

Mouse

- i. Position the **INSERTION POINT** in front of the heading where you want the second subdocument to begin
- ii. Click on the **SPLIT** button.

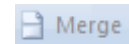


Merging Subdocuments

➤ To merge two subdocuments into one:

Mouse

- i. Open master document and switch to **OUTLINE** view, click on the **SHOW DOCUMENT** button.
- ii. Move the subdocuments next to one another. (If they are not already, using the outlining tools mentioned previously)
- iii. Click on the subdocument icon of the first subdocument
- iv. Hold down **SHIFT** and click on the second subdocument's icon
- v. Click on the **MERGE** button.

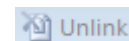


Removing A Subdocument

➤ To convert a subdocument into part of the master document:

Mouse

- i. Switch to **OUTLINE** view
- ii. Click on the subdocument icon belonging to the subdocument you want to convert
- iii. Click on the **UNLINK** Subdocument button.



➤ To completely remove a subdocument from the master document:

Mouse

- i. Open master document and switch to **OUTLINE** view, click on the **SHOW DOCUMENT** button.
- ii. Click on the subdocument icon belonging to the subdocument you want to remove
- iii. Press **DELETE**

This action deletes the subdocument from the main document but the subdocument would still exist on the drive and directory where it is stored with the same filename it had before.



Sharing A Master Document

One of the great advantages of using master and subdocument documents is that more than one person can be working on them at the same time. When you open a master document, you will be able to edit any of the subdocuments that belong to you - these would be the ones that you created. However, if someone else created one of the subdocuments you can only open it as read-only, unless you unlock it.

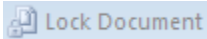
Word determines which document belongs to which person by looking at the name of the Author in the Properties.

Unlocking A Subdocument

A subdocument for which you are not the author will have a small padlock displayed under the subdocument icon. This means that the subdocument is locked for editing you can only open it as read-only.

➤ To unlock the subdocument so that you can make changes:

Mouse

- i. Open master document and switch to **OUTLINE** view, click on the **SHOW DOCUMENT** button.
- ii. Click somewhere in the subdocument
- iii. Click on the **LOCK/UNLOCK** Document button. The padlock symbol should then disappear allowing you to work on the subdocument. 

Multi-User Access

More than one person can work on the same master document at the same time, however they cannot work on the same subdocument.

If you want to work on a subdocument, and let one of your colleagues work on one of the other subdocuments, you should do the following:

➤ To allow others access to the master document:

So that you can work on a subdocument while someone else accesses the master document do the following. (this is assuming that all path names are not known to you. Otherwise it is a simple matter of closing the document someone else wishes to access.)

Mouse

- i. Open master document and switch to **OUTLINE** view, click on the **SHOW DOCUMENT** button.
- ii. Open the required subdocument (unlocking if necessary)
- iii. Using the **VIEW** ribbon, **SWITCH WINDOWS** command, switch to the master document.
- iv. Close the master document so that your colleague can open it
- v. Your colleague can then follow the same process. He or she should also close the master document after opening the relevant subdocument so that you or another colleague can open it. Any changes made to the subdocuments will update in the master document.



Formatting A Master Document

You can format a master document just as you would any other Word document. Any formatting you apply when working in the master document will where relevant carry through to the subdocuments. E.G. if you redefine the formatting of one of the heading styles, the change will automatically carry through to the whole master document and its subdocuments. However, because subdocuments are placed in separate sections of the master document some changes you make may not be carried through to the whole document. E.G. if you make one of the subdocuments landscape, this will only affect the subdocument unless you specify in the Page Set-up dialog that it should affect the whole document.

Styles

The style definitions in the master document override the style definitions in a subdocument. If you insert a subdocument with different style formatting, it will automatically adopt the master document's styles. However when you open the subdocument, it will still retain the old formatting.

Headers And Footers

The Headers and Footers can be different in each subdocument, since they are in separate sections within the master document. If you want consistency throughout the master document, you should modify each of the subdocuments headers and footers to look the same. (**LINK TO PREVIOUS** option on **DESIGN** ribbon when headers & footers are being edited: see sections) If you don't set headers and footers for any of the subdocuments, the master document's header and footer will automatically appear on every page.

Tables Of Contents And Indexes

You do not need to create subdocuments for a table of contents or an index in a master document, simply insert the table of contents as part of the master document before the first subdocument. Similarly insert the index typically after the last subdocument.

Cross-References

If you want to create a cross-reference between two subdocuments, make sure you have the master document open and are working in draft view.

Printing The Master Document

To print the entire master document print in the usual way.

Printing A Subdocument

To print one of the subdocuments, you can open it and print it as normal. If a subdocument contains cross-references to another subdocument, you must print the master document so that the cross-references are updated properly.



SECTION 5 TEMPLATES AND FORMS

By the end of this section you will be able to:

- ✳ Understand what templates can be used for
- ✳ Create a new template
- ✳ Base documents on a saved template
- ✳ Add standard text, formatting and graphics
- ✳ Use fields to automate templates
- ✳ Customise the template with AutoText, macros and toolbars
- ✳ Create an on-line form template
- ✳ Protect a form template
- ✳ Create new documents based on a form template
- ✳ Understand what fields can be used for
- ✳ Insert fields into a document
- ✳ Update fields
- ✳ Lock fields to prevent updates
- ✳ Unlink fields from source data
- ✳ Recognise and use some common long document fields



TEMPLATES

A template is a structure for a particular type of document. You can eliminate much of the work involved in creating new documents if you design templates for the documents you create most often. Templates can include text, styles, formatting, fields, macros, AutoText entries and graphics.

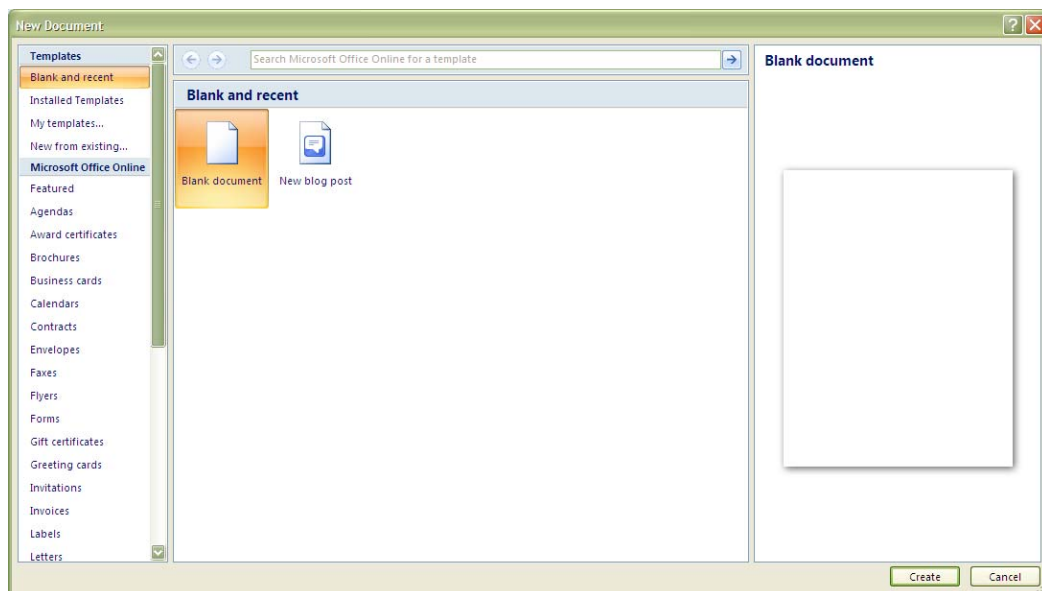
Create A Template

You can create a new template by modifying one of the templates supplied with Word, by saving an existing document in template format or by using the office button, New to set up a brand new template file.

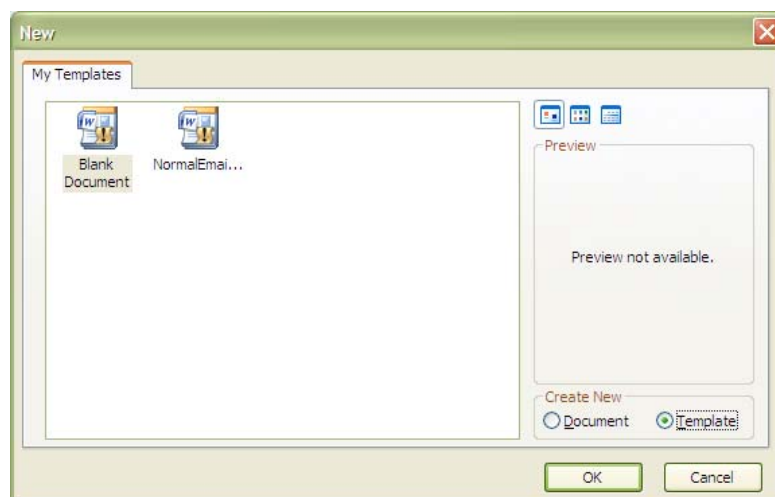
➤ To create a new template:

Mouse

- i. Click the office button then New. The New document task pane will appear



- ii. Choose the **MY TEMPLATE** option on the left a further dialog will appear Ensure that the **BLANK DOCUMENT** icon is highlighted in the main window and select template from the **CREATE NEW** at the bottom right then click **OK**.





- iii. A new document will appear on-screen with the title bar showing Template1
- iv. Save the file with an appropriate name.

*All template files are saved with a .dotx extension in the C:\Documents and Settings\username\Application Data\Microsoft\Templates. This location may be different if your company has specified a different location for user templates in the **OPTIONS** dialog. You can change the location in which to store your template, however, you may have difficulties accessing it*

Setting Template Appearance

When designing a template for documents for a specific purpose, you should consider the usual appearance you want for the documents. Options that affect the appearance of a document include the following:

Paper size

Page orientation

Margins

Headers and footers

➤ To set template appearance:

Mouse

- i. **OPEN** the template file.
- ii. Access the **PAGE SET-UP** dialog and set the **MARGINS**, **ORIENTATION** and **PAPER SIZE** as appropriate.
- iii. Create any **HEADERS** and **FOOTERS** within the template so that all new documents based on the template will have consistent headers and footers and **SAVE** the file.

Special purpose styles can also be part of a template. You can create new styles or copy existing styles from other templates or documents.

See the section on Styles for more information.

Enhancing A Template

Any text or graphics that you save in the template will appear in every document based on that template. This is a way to create, E.G. a standard letter for your company that includes the company logo and address.

➤ To enter boilerplate text and graphics:

Mouse

- iv. Open the template file and Type in any standard text and format it to look the way you want.
- v. **INSERT** any pictures that should appear in all documents based on the template and **SAVE** the file

Template From Existing Document

You can also start from a document you already have and save it as a Template, but the save procedure is different from normal. You select File, Save As. In the Save As



dialog box, you type the file name but then click the Save As File Type drop down option. Choose Document Template from the list and this will add the extension .dot to the file name. It will also change the destination folder into which the file will be saved. This is the special *Templates* folder. It is vital you do not try to override this feature because when you select File, New later, Word will look to the *Templates* folder to present all the available templates to you.

Customising The Template Environment

You can attach different features to a specific template. E.G. you can set up field entries and charts that are template specific and you can create macros that are only available to documents based on a particular template.

FIELDS

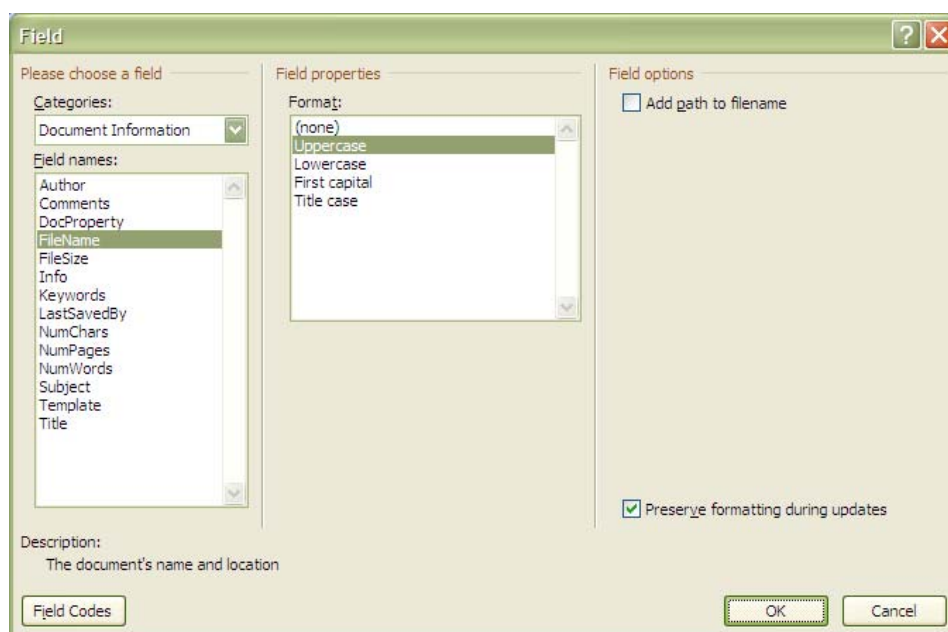
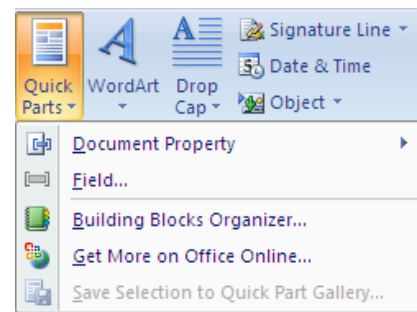
Fields are special codes that instruct Word to insert information into a document. They can be used to provide document information such as the file name, or the date when it was created. You can also use fields for simple information like page numbering and displaying the current date. Fields are also the underlying component of cross-references, tables of contents and indexes.

Inserting Fields

➤ To insert a field into a document:

Mouse

- i. Position the insertion point where you want to add the field
- ii. Choose **QUICK PARTS** from the **INSERT** ribbon in the **TEXT** group. A dialog opens.
- iii. The **FIELD** dialog displays a list of **CATEGORIES**, and when you click on one of these, the **FIELD NAMES** in that category are displayed below. At this point you can select the required field (the description tells you what the field will display) then click on **OK**.





Field Switches (field properties)

Some fields have further options called "switches", E.G. the Filename field has an extra switch, which enables you to display the filename with its full path.

➤ **To add a switch:**

Mouse

- i. Select the switch (Field property) from displayed options
- v. When you have added all the required switches, click on **OK**

Inserting The StyleRef Field

There are various reference fields, which are largely irrelevant, since there is a separate cross-referencing feature in word. However one field, which is useful, is **{StyleRef}**. It is often used to place the current Chapter Title in the Header or Footer area. **{StyleRef}** - inserts the text of the next or most recent paragraph using the specified style. This training manual displays the Heading 1 text in the Header. The text changes only when a new Heading 1 paragraph is on the current page. If there isn't one, it continues to use the last Heading 1 text.

➤ **To insert the StyleRef field:**

Mouse

- i. Choose **QUICK PARTS** from the **INSERT** ribbon in the **TEXT** group. A dialog opens.
- ii. Select the **LINKS AND REFERENCES** category, then select **STYLEREF**
- iii. Specify the style name you wish to use from the field properties and click on **OK**

If you want to change the style, you could simply edit the field by showing the field code in the document:

`{STYLEREF "Heading 1"}`

Then edit the field to link to another style, E.G.:

`{STYLEREF "Heading 2"}` and then press F9 to update the field.

Updating Fields

Most fields do not update automatically. E.G. if you enter the Date field (displays the current date), every time you open the document in future, the old date is still displayed. Or, if you have entered the Filename field in a document, and subsequently change the name of the file, the document will still display the old filename. In these cases you would need to update the fields.

➤ **To update a field:**

Mouse

- i. Right click on a field and choose **UPDATE FIELD**.

Keyboard

- i. Click in or select the field and Press **F9**

Alternatively, you can make Word automatically update all the fields when you print the document.



➤ To set automatic field updating when printing:

Mouse

- Click the **OFFICE BUTTON** and select **PRINTING** and click on **PRINT**.
- On the **PRINT** dialog click **OPTIONS** and a further dialog will open from the word options it will open at the printing options section
- Select the **UPDATE FIELDS BEFORE PRINTING** check box

Printing options

- ☒ Print drawings created in Word ⓘ
- ☐ Print background colors and images
- ☐ Print document properties
- ☐ Print hidden text
- ☐ Update fields before printing
- ☐ Update linked data before printing

Viewing Field Codes

When you have inserted a field, the results will be displayed in your document. E.G. a field code to display the path and name of the current document might show up like this:

C:\MY DOCUMENTS\WORD2002 ADVANCED MANUAL.DOC

You may need to see the underlying code.

Display All Field Codes

➤ To display all the field codes in the document:

Keyboard

- Press **ALT F9** OR Click the **OFFICE BUTTON** and select **WORD OPTIONS**. Click on the **ADVANCED** tab and scroll on the right to **SHOW DOCUMENT CONTENT**. Click on the **SHOW FIELD CODES INSTEAD OF THEIR VALUES** check-box.
- You also have the option how those field codes are displayed just underneath that option you may select from the drop down box whether to show the fields shaded or not so as to easily identify them.

Whatever choices you make these are selections for the screen only the fields will print the actual vales as described. Print preview will show exactly how the data will appear. To toggle back to display all field results, repeat the procedure above.





Display A Single Field Code

➤ To display the underlying field code:

Mouse

- i. Press the right mouse button when pointing at the field from the shortcut menu click on **TOGGLE FIELD CODES**

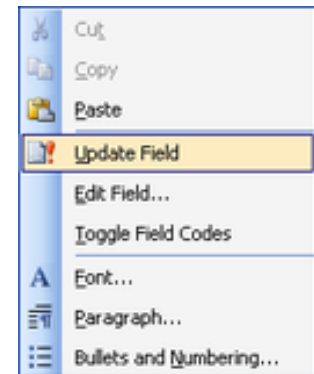
Or

Keyboard

- i. Click in or select the resulting the text, and press **SHIFT F9**

The field code is always displayed inside a set of brackets. The name of the field is displayed along with any switches.

{FILENAME \p * MERGEFORMAT}



*Pressing **SHIFT F9** (or using the menu) is a toggle, in other words every time you press it, and Word either displays the field result or the field code.*

Locking

It is possible to lock a field so that the results displayed cannot be updated by either pressing **F9**, or by using the turning off the **UPDATE FIELDS BEFORE PRINTING** option in the **PRINTING** Options.

➤ To lock/unlock a field:

Keyboard

- i. Click in or select the field. Press **CTRL F11**.
- ii. Click in or select the field Press **CTRL SHIFT F11**

Unlinking Fields

You can also unlink a field. The field result is converted into literal text, which means it is no longer, a field and so cannot be updated.

➤ To unlink a field:

Keyboard

- i. Click in or select the field
- ii. Press **CTRL SHIFT F9**

Deleting Fields

If you have entered a field which you no longer want to keep, you must select the whole field before pressing **DELETE** or **BACKSPACE**.

Common Long Document Fields

There are many different types of fields, some of which are used for specific tasks. The following fields are some of the more common used in Long Documents. Whilst these fields can be placed anywhere in a document, they are often displayed in the Header and Footer area.



Date And Time

Field Name	Description
Date	The current date
Time	The current time
Create Date	The date when the document was created
Print Date	The date when the document was last printed
Save Date	The date when the document was last saved

When you insert these fields, you can click on the **OPTIONS** button in the Field dialog to change the formatting of the dates and times.

Document Information

Field Name	Description
Title	The Title from the Summary Information
Subject	The Subject from the Summary Information
Author	The Author from the Summary Information
LastSavedBy	The name of the person who last saved the file
Filename	The name of the document, with an option to display the full path
Template	The name of the document's template, and an option to display the path
NumPages	The total number of pages in the document

Numbering

Field Name	Description
Page	The current page number
Section	The current section number
Section Pages	The total number of pages in the current section
RevNum	The number of times the document has been saved

The Page and The Section fields can be combined to produce composite page numbers. E.G. the second page in the fifth section could be displayed like this: 5-2.



Using Fields In A Template

Word fields may also be part of a template. There are nine categories of Word fields and they provide the means to insert information or perform an action automatically. E.G. the Date field inserts the computer system's current date in a document. Other Word fields can insert page or section numbers, enter the author's name, or insert correct page references to another page in the document.

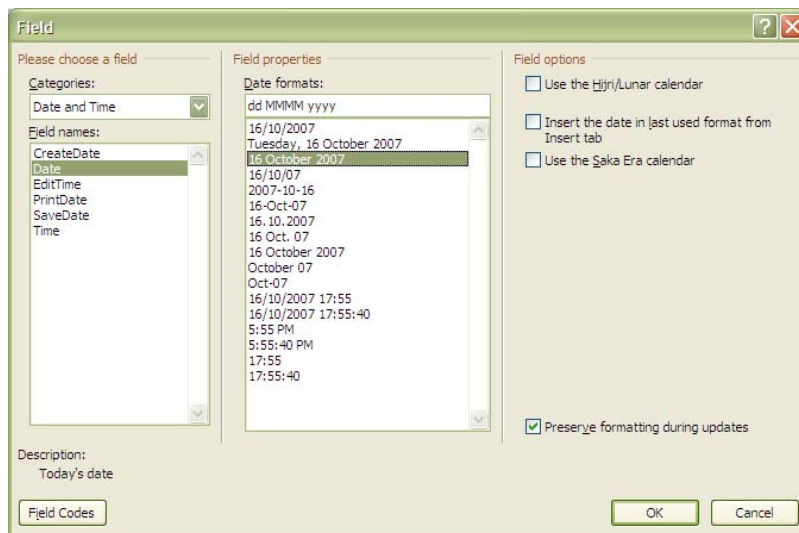
When you insert the date or time, you can check Update Automatically. When this is checked, Word will automatically update the field to the current date or time when the document is printed. If you want the current date to be inserted in the document and to remain as that date, do not check Update Automatically.

In order to view the field inserted in a document or template, you must check the **SHOW FIELD SHADING WHEN SELECTED OPTION** in the **ADVANCED** tab, **DISPLAY** section of the **WORD OPTIONS** dialog box accessed from the **OFFICE** button.

➤ To insert a date field in a template:

Mouse

- i. **OPEN** the template file
- ii. Position the insertion point where you want the date to appear.
- iii. Go to the **QUICKPARTS** button on the **INSERT** ribbon and select **FIELD**.
- iv. Insert the **DATE** field from the **FIELD** dialog
- v. Choose the format you would like for your date by clicking on the appropriate date in the list of field properties .



- vi. Click **OK**. The date will appear in the template.



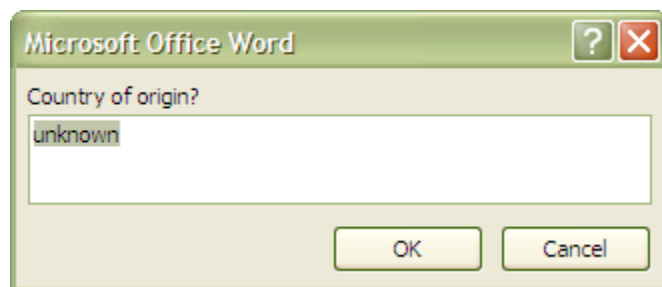
The Fillin Field

The fillin field allows you to pop-up a custom dialog box that prompts the user of the document to enter text. You enter the message that you want displayed in the dialog box. E.G. you might use a fillin field in a memo template to prompt the author for the memo subject.

➤ To insert fields to provide user prompts:

Mouse

- i. Open the template file.
- ii. Position the cursor where you want the variable information.
- iii. Go to the **QUICKPARTS** button on the **INSERT** ribbon and select **FIELD**. The field dialog box will appear.
- iv. In the **CATEGORIES** list choose **MAIL MERGE**.
- v. In the **FIELD NAMES** list choose **FILL-IN**. Click in the **FIELD PROPERTIES** text box and type your prompt, such as Please enter the memo subject.
- vi. If you expect many entries the same such as "country of origin" "UK" then enter a default response in the **FIELD OPTIONS** text box for a default response.
- vii. Click **OK**. The following dialog box will flash up on the screen.
- viii. This is a preview of how your prompt boxes will appear to those people using your template.
- ix. Click the **CANCEL** button to clear the dialog.
- x. Repeat the process until you have created dialogs to cover all the variable information you need to prompt for.
- xi. Save the template file.



*You won't see the underlying **FILLIN** field codes unless you switch on the field codes on the **ADVANCED** page **SHOW DOCUMENT CONTENT** section of the **OPTIONS** dialog. It is useful to see these as you are working on the template, but remember to switch them off before you save the file or anyone using the template might get confused!*



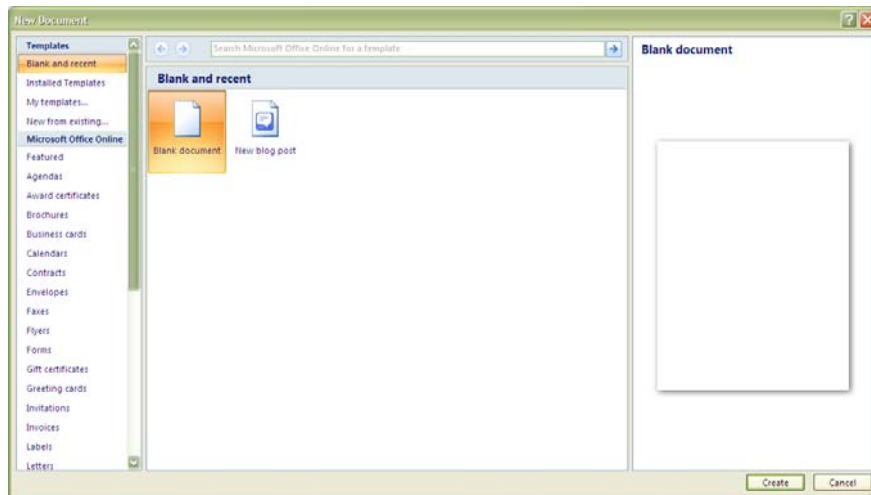
Using A Template With Fillin Fields

The dialog boxes will appear whenever a new document based on the template is created.

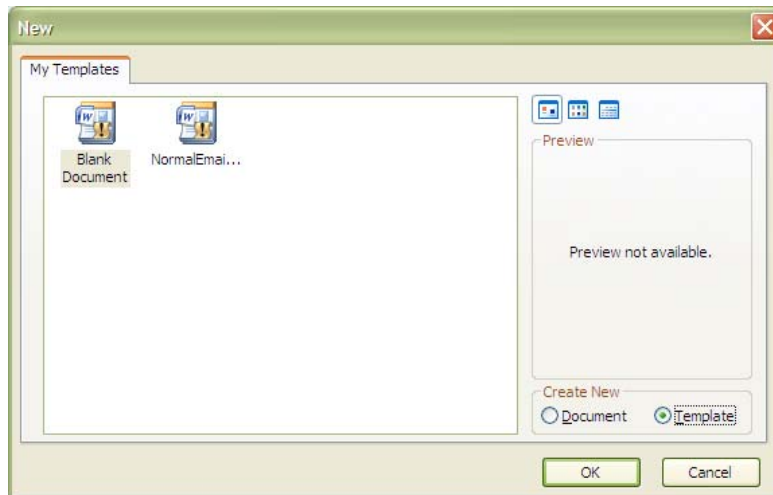
➤ To create a new document based on the template:

Mouse

- i. Click the **OFFICE BUTTON** then **NEW**. The **NEW DOCUMENT** dialog will appear



- ii. Choose the **MY TEMPLATE** option on the left a further dialog will appear. Ensure that the **BLANK DOCUMENT** icon is highlighted in the main window and select template from the **CREATE NEW** at the bottom right then click **OK**.



- iii. The templates should be listed on the **MY TEMPLATES** page of the dialog in icon format. Select the type of document you want to create and ensure that the document option in the create new section is selected then click on ok or double click the icon.
- iv. The new document will appear with any boilerplate text, headers and footers and dialogs that you set up in the template.
- v. Fill the document in and save and print it in the usual way.



Whenever you click in a field code or result, the whole field is displayed with a grey shaded background. However you can use the Field shading Options dialog to specify that all fields, even if they are not selected, should be displayed with a grey background. This can help you to quickly identify text which has been generated by a field.

➤ **To alter field shading options:**

Mouse

- i. Click the **OFFICE BUTTON** and select **WORD OPTIONS**. Click on the **ADVANCED** tab and scroll on the right to **SHOW DOCUMENT CONTENT**. Click on the **SHOW FIELD CODES INSTEAD OF THEIR VALUES** check-box.
- ii. Use the **FIELD SHADING** drop down list to pick the type of shading you want:

*Choose **NEVER** to display no shading*

*Choose **ALWAYS** to display shading on all fields*

***WHEN SELECTED** is the default*



FORM FIELDS

Starting with a template, you can add content controls and instructional text in Microsoft Office Word 2007 to quickly and easily create a form that you can send to others to fill out using Office Word 2007 on their computer. In an advanced scenario, any content controls that you add to a form can also be linked to data.

You can also create a form by starting with a sample template. Many are available on the Microsoft Office Online Web site.

You can print a form that was created by using content controls in Office Word 2007, but the boxes around the content controls will not be printed.

Create A Form

Word is not immediately ready to start creating forms as the more advanced tools have been hidden. To rectify this we must make them available.

➤ To Set up Word for creating forms

Mouse



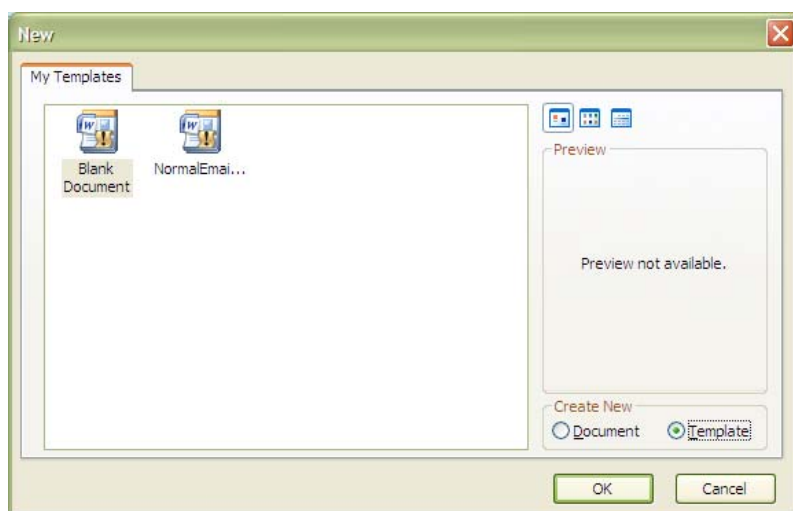
- i. Click the **OFFICE BUTTON**, and then click **WORD OPTIONS**.
- ii. Click **POPULAR**.
- iii. Select the **SHOW DEVELOPER TAB IN THE RIBBON** check box, and then click **OK**.

➤ To create a template or a document on which to base the form

Mouse



- i. Click the **OFFICE BUTTON**, and then click **NEW**.
- ii. Under **TEMPLATES**, click **MY TEMPLATES**.
- iii. Double-click **NORMAL**, and then select **TEMPLATE** or **DOCUMENT** under **CREATE NEW**.



- iv. Click **OK**
- v. Click the **OFFICE BUTTON**, and then click **SAVE AS**.





- vi. In the **SAVE AS** dialog box, give the new template or document a file name, and then click **SAVE**.

Controls

Content control	Definition	Example	Restrictions
Rich Text	Formatting can be saved by loading, saving, or closing the document.	Use for a short paragraph such as an abstract, a summary, or a legal disclaimer.	No restrictions.
Text	Limited to content that cannot contain any formatting, only plain text.	Use for a simple paragraph.	Limits the formatting to the formatting that is applied around the content control. You can change the formatting by making changes to the surrounding formatting.
Picture	Fills the content control with a single picture.	Use for a drawing, a shape, a chart, a table, a clip art object, or SmartArt.	Limits formatting changes to picture brightness and contrast. Also prohibits users from inserting any other Word objects or any text.
Combo Box	Contains a list that you can edit directly. Formatting can be saved by saving or closing the document.		Like plain text, limits text to a single paragraph that cannot contain any formatting.
Drop-Down List	Contains a list of restricted choices defined by the template author when the user activates the drop-down box.	Use this to provide a set of choices, such as a list of names or a set of formatted design elements (such as cover pages or header or footers).	Like plain text, limits text to a single paragraph that cannot contain any formatting.
Date Picker	Contains a calendar control. Limits text to a single paragraph.	Use this to help users enter a date.	Like plain text, limits text to a single paragraph that cannot contain any formatting.
Building Block Gallery	Shows a gallery of formatted design choices that you can add to the content control.	Use this to specify a set of cover pages, headers and footers, page designs, or other building blocks that you add to the Quick Parts gallery.	No restrictions.



➤ To Add content controls to the form

Mouse and keyboard

- Design the form by sketching a layout first (on paper), or use an existing form as a guide.
- In your form, you can add content controls, tables, and other graphics elements.
- On the **DEVELOPER** ribbon, in the **CONTROLS** group, click **DESIGN MODE**, and then click where you want to insert a control.



Insert a text control where users can enter text



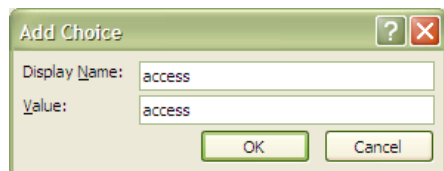
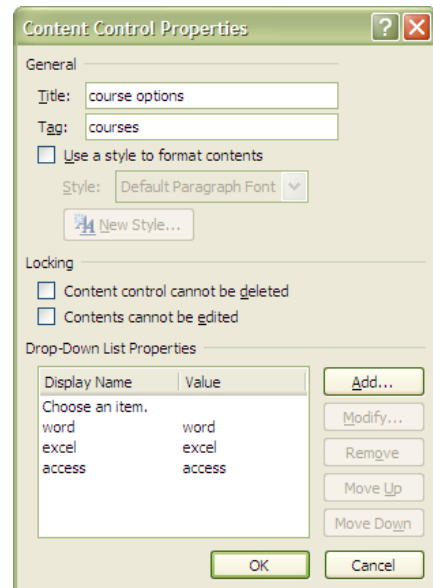
- On the **DEVELOPER** ribbon, in the **CONTROLS** group, click the **RICH TEXT** control or the **TEXT** control.



Insert a drop-down list that restricts available choices to those you specify



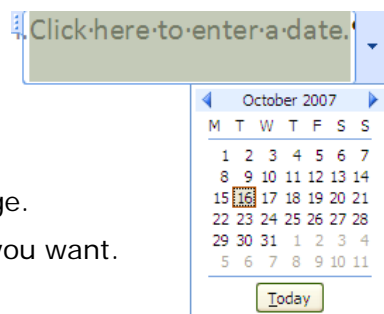
- On the **DEVELOPER** ribbon, in the **CONTROLS** group, click the **DROP-DOWN LIST** control.
- Select the content control, and then on the **DEVELOPER** ribbon, in the **CONTROLS** group, click **PROPERTIES**.
- To create a list of choices, under **DROP-DOWN LIST PROPERTIES**, click **ADD**.
- Type a choice in the **DISPLAY NAME** box, such as **YES**, **NO**, or **MAYBE**.
- Repeat this step until all of the choices are in the drop-down list then click **OK**.



➤ To set or change properties for content controls

Each content control has properties that you can set or change. E.G., the Date Picker control offers options for the format you want to use to display the date.

- Ensure you are in **DESIGN MODE**
- Right-click the content control that you want to change.
- Click **PROPERTIES**, and change the properties that you want.



➤ To add instructional text to the form

Instructional text can enhance the usability of the form you create and distribute. You can change the default instructional text in content controls. To customise the default instructional text for your form users, do the following:

Mouse

- On the **DEVELOPER** ribbon, in the **CONTROLS** group, click **DESIGN MODE**.
- Click the content control where you want to revise the placeholder instructional text.



- iii. Edit the placeholder text and format it any way you want.
- iv. If you want the content control to disappear when someone types in their own content to replace your instructions in a **RICH TEXT** control or a **TEXT** control, click **PROPERTIES** in the **CONTROLS** group, and then select the **REMOVE CONTENT CONTROL WHEN CONTENTS ARE EDITED** check box.
- v. On the **DEVELOPER** ribbon, in the **CONTROLS** group, click **DESIGN MODE** to turn off the design feature and save the instructional text.

*Do not select the **CONTENTS CANNOT BE EDITED** check box if you want form users to replace the instructional text with their own text.*

Add Protection To The Form

You can protect individual content controls in a template to help prevent someone from deleting or editing a particular content control or group of controls, or you can help protect all of the template content with a password.

If you want, you can test the form prior to distributing it. Open the form, fill it out as the user would, and then save a copy in a location that you want.

➤ To Protect fields in a form

- i. Open the form that you want to protect.
- ii. Select the content control or the group of controls to which you want to restrict changes.
- iii. To group several controls, select the controls by pressing **SHIFT** and clicking each control that you want to group. On the **DEVELOPER** ribbon, in the **CONTROLS** group, click **GROUP**, and then click **GROUP**.
- iv. On the **DEVELOPER** ribbon, in the **CONTROLS** group, click **PROPERTIES**.
- v. In the **CONTENT CONTROL PROPERTIES** dialog box, under **LOCKING**, do either of the following:

Select the **CONTENT CONTROL CANNOT BE DELETED** check box, which allows the content of the control to be edited but the control itself cannot be deleted from the template or a document that is based on the template.

Select the **CONTENTS CANNOT BE EDITED** check box, which allows you to delete the control but does not allow you to edit the content in the control.

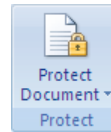
This option is not available for all controls.



➤ To Protect all of the contents of a form

Mouse

- i. Open the form that you want to help protect.
- ii. On the **DEVELOPER** ribbon, in the **PROTECT** group, click **PROTECT DOCUMENT**, and then click **RESTRICT FORMATTING AND EDITING**.
- iii. In the **PROTECT DOCUMENT** task pane, under **EDITING RESTRICTIONS**, select the **ALLOW ONLY THIS TYPE OF EDITING IN THE DOCUMENT** check box.
- iv. In the list of editing restrictions, select **FILLING IN FORMS**.
- v. Under **START ENFORCEMENT**, click **YES, START ENFORCING PROTECTION**.
- vi. To assign a password to the document so that only reviewers who know the password can remove the protection, type a password in the **ENTER NEW PASSWORD (OPTIONAL)** box, and then confirm the password.



Restrict Formatting and Editing

1. Formatting restrictions

☐ Limit formatting to a selection of styles

[Settings...](#)

2. Editing restrictions

☒ Allow only this type of editing in the document:

No changes (Read only) ▼

Tracked changes

Comments

Filling in forms

No changes (Read only) ▼

choose users who are freely edit them.

Groups:

☐ Everyone

[More users...](#)

3. Start enforcement

Are you ready to apply these settings? (You can turn them off later)

Yes, Start Enforcing Protection

[See also](#)

[Restrict permission...](#)

➤ To Protect A Section Of The form

Rather than protect the whole of a form, you may want to allow users to freely type into certain areas.

Mouse

- i. Position the insertion point where you wish protection to stop.
- ii. Select **BREAKS** from the **PAGE SETUP** group on the **PAGE LAYOUT** ribbon.
- iii. Click on the **CONTINUOUS** break.
- iv. **PROTECT DOCUMENT** from the review ribbon
- v. Click on the **FILLING IN FORMS** from the drop down box then go to the **SECTIONS** part of the task pane.
- vi. Remove the protection from Section 2 and click on the **YES START PROTECTION**.
- vii. Type a password if you desire. Confirm the password and note that the top section is now protected. Now save the template.

Open a new document based on this and note that while you can only access the fields in the protected section you are able to type below the section break.

If you choose not to use a password, anyone can change your editing restrictions. Use strong passwords that combine uppercase and lowercase letters, numbers, and symbols. Weak passwords don't mix these elements. Strong password: Y6dh!et5. Weak password: House27. Passwords should be 8 or more characters in length. A pass phrase that uses 14 or more characters is better.

It is critical that you remember your password. If you forget your password, Microsoft cannot retrieve it. Store the passwords that you



write down in a secure place away from the information that they help protect.



SECTION 6 MAILMERGE

By the end of this section you will be able to:

- ✦ Use mail merge to create and print letters and other documents Understand what templates can be used for
- ✦ Setup a merge document
- ✦ Connect to a data source
- ✦ Merge data to main document



Use Mail Merge To Create And Print Letters And Other Documents

You use mail merge when you want to create a set of documents, such as a form letter that is sent to many customers or a sheet of address labels. Each letter or label has the same kind of information, yet the content is unique. E.G. in letters to your customers, each letter can be personalized to address each customer by name. The unique information in each letter or label comes from entries in a data source.

The mail merge process entails the following overall steps:

- i. **SET UP THE MAIN DOCUMENT.** The main document contains the text and graphics that are the same for each version of the merged document. E.G., the return address or salutation in a form letter.
- ii. **CONNECT THE DOCUMENT TO A DATA SOURCE.** A data source is a file that contains the information to be merged into a document. E.G., the names and addresses of the recipients of a letter.
- iii. **ADD PLACEHOLDERS**, called mail merge fields, to the document. When you perform the mail merge, the mail merge fields are filled with information from your data file.
- iv. **REFINE THE LIST OF RECIPIENTS OR ITEMS.** Word generates a copy of the main document for each item, or record, in your data file. If your data file is a mailing list, these items are probably recipients of your mailing. If you want to generate copies for only certain items in your data file, you can choose which items (records) to include.
- v. **PREVIEW AND COMPLETE THE MERGE.** You can preview each copy of the document before you print the whole set.

*You use commands on the **MAILINGS** ribbon to perform a mail merge.*

*You can also perform a mail merge by using the **MAIL MERGE** task pane, which leads you step by step through the process. To use the task pane, in the **START MAIL MERGE** group on the **MAILINGS** ribbon, click **START MAIL MERGE**, and then click **STEP BY STEP MAIL MERGE WIZARD**.*

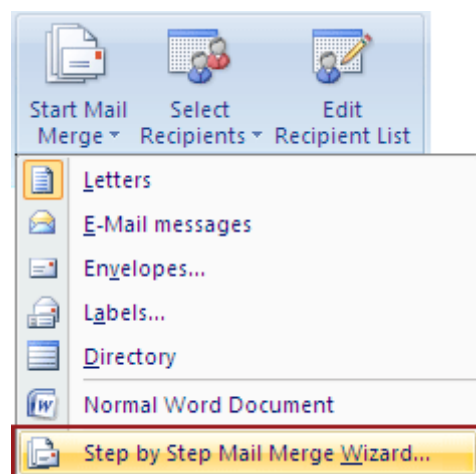
Set Up The Main Document

➤ To set up main document.

Mouse

- i. Open or create a document and leave it open. If you close it, the commands in the next step are not available.
- ii. On the **MAILINGS** ribbon, in the **START MAIL MERGE** group, click **START MAIL MERGE**.
- iii. Click the type of document that you want to create.

- ★ **A SET OF ENVELOPES** The return address is the same on all the envelopes, but the destination address is unique on each one. Click **ENVELOPES**, and then specify your preferences for envelope size and text





formatting on the **ENVELOPE OPTIONS** tab of the **ENVELOPE OPTIONS** dialog box.

- ✳ **A SET OF ADDRESS LABELS** Each label shows a person's name and address, but the name and address on each label is unique. Click **LABELS**, and then specify your preferences for the type of label in the **LABEL OPTIONS** dialog box.
- ✳ **A SET OF FORM LETTERS OR E-MAIL MESSAGES** The basic content is the same in all the letters or messages, but each contains information that is specific to the individual recipient, such as name, address, or some other piece of information. Click **LETTERS** or **E-MAIL MESSAGES** to create these types of documents.
- ✳ **A CATALOG OR 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. Click **DIRECTORY** to create this type of document.

➤ To resume a mail merge

If you need to stop working on a mail merge, you can save the main document and resume the merge later. Microsoft Office Word retains the data source and field information. If you were using the **MAIL MERGE** task pane, Word returns to your place in the task pane when you resume the merge.

Mouse

- i. When you're ready to resume the merge, open the document. Word displays a message that asks you to confirm whether you want to open the document, which will run a SQL command.
- ii. Because this document is connected to a data source and you want to retrieve the data, click **YES**. If you were opening a document that you did not realize was connected to a data source, you could click **NO** to prevent potentially malicious access to data.
- iii. The text of the document, along with any fields that you inserted, appears.
- iv. Click the **MAILINGS** ribbon, and resume your work.

Connect The Document To A Data Source

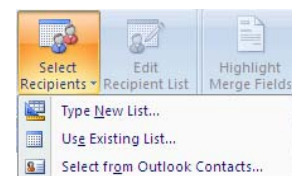
To merge information into your main document, you must connect the document to a data source, or a data file. If you don't already have a data file, you can create one during the mail merge process.



➤ To choose a data file from outlook

Mouse

- i. On the **MAILINGS** ribbon, in the **START MAIL MERGE** group, click **SELECT RECIPIENTS**.



You May use data from any of these sources

- ✳ **EXCEL FILE** If you have a Microsoft Office Excel worksheet, a Microsoft Office Access database, or another type of data file, click **USE EXISTING LIST**, and then locate the file in the **SELECT DATA SOURCE** dialog box you can select data from any worksheet or named range within a workbook. For Access, you can select data from any table or query that is defined in the database. For another type of data file, select the file in the **SELECT DATA SOURCE** dialog box. If the file is not listed, select the appropriate file type or select **ALL FILES**



in the **FILES OF TYPE** box. In a mail merge, you can use the following types of data files:

- ✴ **DATABASE**.- Files from single-tier, file-based database programs for which you have installed an OLE DB provider or ODBC (Open Database Connectivity): A standard method of sharing data between databases and programs. ODBC drivers use the standard Structured Query Language (SQL) to gain access to external data.) driver (a number of which are included with Microsoft Office).
- ✴ **CSV (DELIMITED TEXT FILE)**Click the **USE AN EXISTING LIST** option, and browse to locate the .csv file that you have exported or any text file that has data separated (or delimited) by tab characters or commas and data records separated by paragraph marks.. Before the file opens, you may be asked to select which separator character will separate one column from another in your address list. Click **COMMA** for CSV files, and then click **OK**.
- ✴ **CONTACTS (OUTLOOK)**If you want to use your Contacts list in Outlook, click Select from Outlook Contacts. Any similar address lists that were created with a MAPI -compatible messaging system.
- ✴ **A MICROSOFT WORD DOCUMENT**. The document should contain a single table. The first row of the table must contain headings, and the other rows must contain the records that you want to merge. You can also use a header source (header source: A document that contains the header row (or header record) to be used with the data source specified for a mail-merge main document.) as a data source.
- ✴ **HTML** file. An HTML file that has a single table. The first row of the table must contain column names, and the other rows must contain data.
- ✴ **MICROSOFT SCHEDULE+** 7.0 Contact List

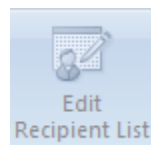
To Refine Or Filter The List Of Recipients

When you connect to a certain data file, you might not want to merge information from all the records in that data file into your main document.

➤ To refine list of recipients

Mouse

- i. On the **MAILINGS** Ribbon, in the **START MAIL MERGE** group, click **EDIT RECIPIENT** List.
- ii. In the **MAIL MERGE RECIPIENTS** dialog box Select individual records. This method is most useful if your list is short. Select the check boxes next to the recipients you want to include, and clear the check boxes next to the recipients you want to exclude.



If you know that you want to include only a few records in your merge, you can clear the check box in the header row and then select only those records that you want. Similarly, if you want to include most of the list, select the check box in the header row, and then clear the check boxes for the records that you don't want to include.

➤ To Sort records

Mouse

- i. Click the column heading of the item that you want to sort by. The list sorts in ascending alphabetical order (from A to Z). Click the column heading again to sort the list in descending alphabetical order (Z to A).



If you want more complex sorting, click **SORT** under **REFINE**
RECIPIENT LIST and choose your sorting preferences on the **SORT**

?

✖

Mail Merge Recipients

This is the list of recipients that will be used in your merge. Use the options below to add to or change your list. Use the checkboxes to add or remove recipients from the merge. When your list is ready, click OK.

Data Source	<input checked="" type="checkbox"/>	LAST	FIRST	NUM	DIVISION	DEPT	Ris
mail.xls	<input checked="" type="checkbox"/>	Lewis	Michael	62	Australia	Water Rides	Me
mail.xls	<input checked="" type="checkbox"/>	Binga	Erin	93	Australia	Adult Rides	Hig
mail.xls	<input checked="" type="checkbox"/>	MacFall	Jeri Lynn	24	Australia	Water Rides	Me
mail.xls	<input checked="" type="checkbox"/>	Parker	Joanne	30	Australia	Water Rides	Me
mail.xls	<input checked="" type="checkbox"/>	Bowers	Melanie	44	Australia	Adult Rides	Hig
mail.xls	<input checked="" type="checkbox"/>	Thomas	Greg	91	Australia	Children's Rides	Lov
mail.xls	<input checked="" type="checkbox"/>	Williams	Esther	77	Australia	Water Rides	Me
mail.xls	<input checked="" type="checkbox"/>	Banks	Jacqueline	22	Australia	Shows	Nor
mail.xls	<input checked="" type="checkbox"/>	Binga	Frieda	74	Australia	Adult Rides	Hig
mail.xls	<input checked="" type="checkbox"/>	Winger	Lindsey	65	Australia	Adult Rides	Hig
mail.xls	<input checked="" type="checkbox"/>	Maccaluso	Joshua	56	Australia	Water Rides	Me
mail.xls	<input checked="" type="checkbox"/>	Calvin	Marianne	70	Australia	Shows	Nor

⏪

⏩

Data Source

mail.xls

Edit...

Refresh

Refine recipient list

⬆️

Sort...

🔍

Filter...

🔍

Find duplicates...

🔍

Find recipient...

🔍

Validate addresses...

OK

RECORDS tab of the **FILTER AND SORT** dialog box. E.G. you can use this type of sorting if you want recipient addresses to be alphabetized by last name within each post code and the post codes listed in numerical order.

➤ **To Filter records**

This is useful if the list contains records that you know you don't want to see or include in the merge. After you filter the list, you can use the check boxes to include and exclude records.

Mouse

- i. Under **REFINE RECIPIENT LIST**, click **FILTER**.
- ii. On the **FILTER RECORDS** tab of the **FILTER AND SORT** dialog box, choose the criteria you want to use for the filter.

The screenshot shows a 'Filter and Sort' dialog box with the 'Filter Records' tab selected. It contains a table for defining filter criteria with columns for Field, Comparison, and Compare to. The first row is populated with 'DIVISION', 'Equal to', and 'Shows'. The second row is populated with 'HRS', 'Greater than or equal', and '30'. There are 'And' buttons between the rows. At the bottom, there are 'Clear All', 'OK', and 'Cancel' buttons.

	Field:	Comparison:	Compare to:
	DIVISION	Equal to	Shows
And	HRS	Greater than or equal	30
And			

Buttons: Clear All, OK, Cancel



*E.G. to generate copies of your main document only for divisions that list shows as the division, you would click **divisions** in the **Field** list, **Equal to** in the **Comparison** list, and **shows** in the **Compare** to list.*

- iii. To refine the filter further, click **AND** or **OR**, and then specify more criteria.

*If you have installed address validation software, you can click **VALIDATE ADDRESSES** in the **MAIL MERGE RECIPIENTS** dialog box to validate your recipients' addresses.*

Merge Fields

After you connect your main document to a data file and have refined your list of recipients you are ready to type the text of the document and add placeholders that indicate where the unique information will appear in each copy of the document.

The placeholders, such as address and greeting, are called mail merge fields. Fields in Word correspond to the column headings in the data file that you select.

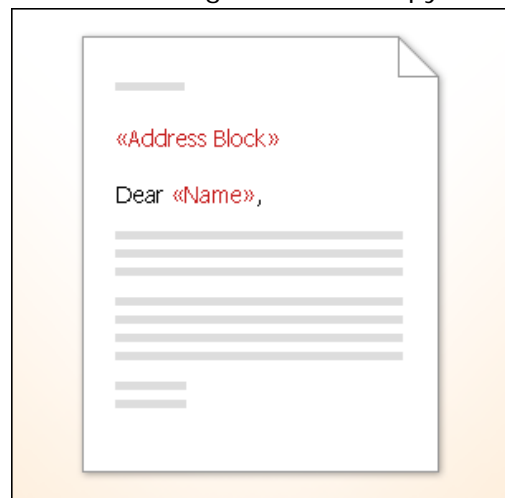
	A	B	C
1	Name	Last Name	Street Address
2	Nancy	Anderson	123 Main St.
3	Ann	Beebe	567 Country Rd.
4			
5			
6			
7			
8			
9			

- 1 COLUMNS** in a data file represent categories of information. Fields that you add to the main document are placeholders for these categories.

- 2 ROWS** in a data file represent records of information. Word generates a copy of the main document for each record when you perform a mail merge.

By putting a field in your main document, you indicate that you want a certain category of information, such as name or address, to appear in that location.

When you insert a mail merge field into the main document, the field name is always surrounded by chevrons (« »). These chevrons do not show up in the merged documents. They just help you distinguish the fields in the main document from the regular text.



What happens when you merge

When you merge, information from the first row in the data file replaces the fields in your main document to create the first merged document. Information from the second row in the data file replaces the fields to create the second merged document, and so on.

Examples

You can add any column heading from your data file to a field. This gives you flexibility when you design form letters, labels, e-mail messages, and other merged documents. E.G.:

	A	B	C
1	Name	Last Name	Street Address
2	Nancy	Anderson	123 Main St.
3	Ann	Beebe	567 Country Rd.
4			
5			
6			
7			
8			
9			



Suppose you are creating a letter to notify local businesses that they have been selected for inclusion in your annual city guide. If your data file contains a Company column with the name of each business that you want to contact, you can insert the «Company» field instead of typing the name of each individual company.

Imagine that you send quarterly e-mail messages to your customers alerting them to new products and special deals. To personalize those messages for your best customers, you can add a PersonalNote column to your data file where you can type notes such as "Miss Miller, the new widget is exactly what you have been looking for." By placing a «PersonalNote» field in the main document, you can include those notes at the bottom of certain messages.

Suppose that your mailing list is for subscribers to your newsletter, and your data file includes a column, called ExpireDate, for storing the date that each subscription expires. If you place an «ExpireDate» field in the label main document before you run the merge, subscribers will each see their own expiration date on their mailing label.

You can combine fields and separate them by punctuation marks. E.G. to create an address, you can set up the fields in your main document like this:

«First Name» «Last Name»

«Street Address»

«City», «State» «Postal code»

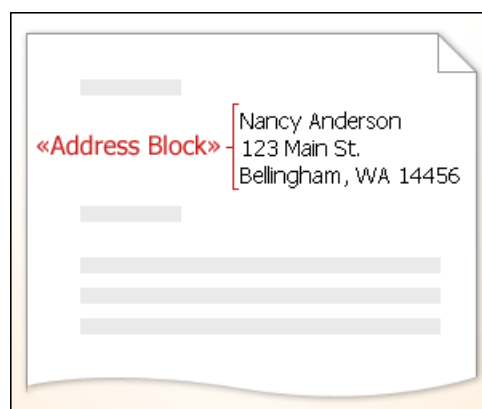
Address Blocks

For things that you use frequently, like address blocks and greeting lines, Word provides composite fields that group a number of fields together. E.G.:

The Address Block field is a combination of several fields, including first name, last name, street address, city, and postal code.

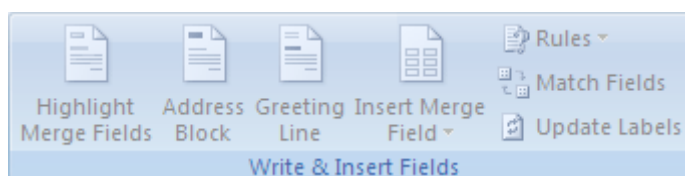
The Greeting Line field can include one or more name fields, depending on your chosen salutation.

You can customize the content in each of these composite fields. E.G. in the address, you may want to select a formal name format (Mr. Joshua Randall Jr.); in the greeting, you may want to use "To" instead of "Dear."



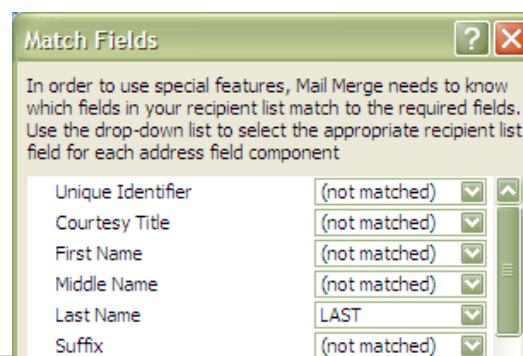
➤ To create address blocks

To make sure that Word can find a column in your data file that corresponds to every address or greeting element, you may need to map the mail merge fields in Word to the columns in your data file.



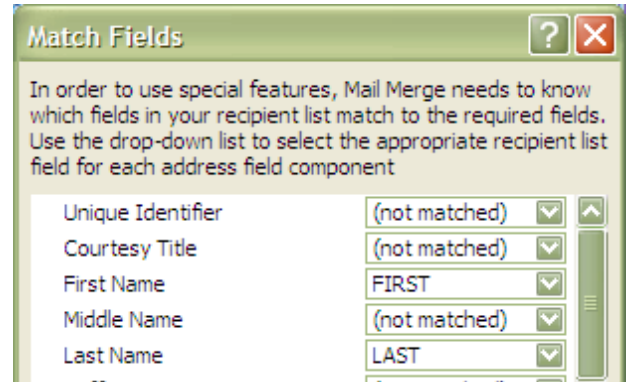
Mouse

- i. To map the fields, click **MATCH FIELDS** in the **WRITE & INSERT FIELDS** group of the **MAILINGS** ribbon. The **Match Fields** dialog box opens.





- ii. The elements of an address and greeting are listed on the left. Column headings from your data file are listed on the right.
- iii. Word searches for the column that matches each element. In the illustration, Word automatically matched the data file's **SURNAME** column to **LAST NAME**. But Word was unable to match other elements. From this data file, E.G. Word can't match **FIRST NAME**.
- iv. In the list on the right, you can select the column from your data file that matches the element on the left. In the illustration, the **NAME** column now matches **FIRST NAME**. It's okay that **COURTESY TITLE**, **UNIQUE IDENTIFIER**, and **MIDDLE NAME** aren't matched. Your mail merge document doesn't need to use every field. If you add a field that does not contain data from your data file, it will appear in the merged document as an empty placeholder — usually a blank line or a hidden field.

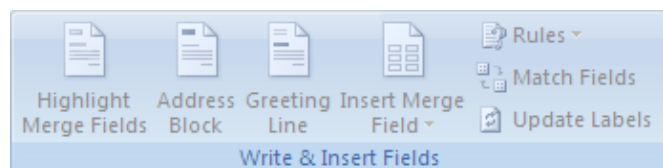


Type Content And Add Fields

➤ To insert fields

In the main document, click where you want to insert the field.

Use the **WRITE & INSERT FIELDS** group on the **MAILINGS** ribbon.



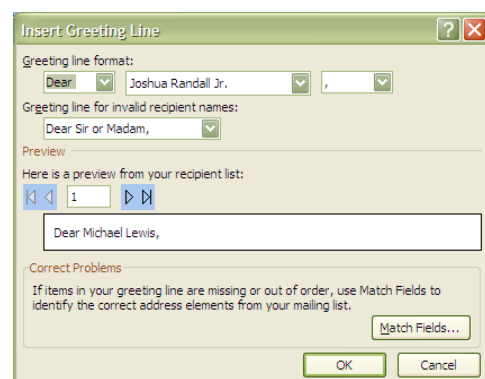
➤ To add Address block with name, address, and other information

- i. Click **ADDRESS BLOCK**.
- ii. In the **INSERT ADDRESS BLOCK** dialog box, select the address elements that you want to include and the formats that you want, and then click **OK**.
- iii. If the **MATCH FIELDS** dialog box appears, Word may have been unable to find some of the information that it needs for the address block. (See above how to match fields.)



➤ To insert Greeting line

- i. Click **GREETING LINE**.
- ii. Select the greeting line format, which includes the salutation, name format, and following punctuation.





- iii. Select the text that you want to appear in cases where Word can't interpret the recipient's name, E.G. when the data source contains no first or last name for a recipient, but only a company name.
- iv. Click **OK**.
- v. If the **MATCH FIELDS** dialog box appears, Word may have been unable to find some of the information that it needs for the address block. (See above how to match fields.)

➤ To insert Individual fields

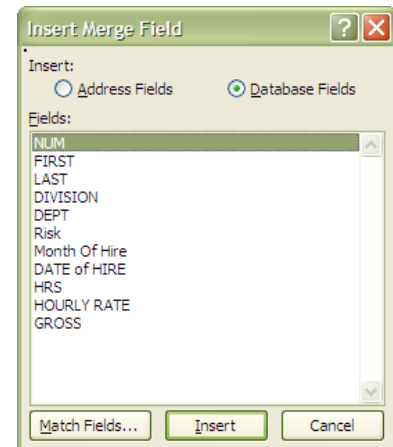
You can insert information from individual fields, such as first name, telephone number, or the amount of a contribution from a list of donors. To quickly add a field from your data file to the main document, click the arrow next to **INSERT MERGE FIELD**, and then click the field name.

Mouse

- i. On the **MAILINGS** ribbon, in the **WRITE & INSERT FIELDS** group, click the arrowed part of the **INSERT MERGE FIELD** button.
- ii. Select a field from the drop down list for it to be inserted.

Or

- i. On the **MAILINGS** ribbon, in the **WRITE & INSERT FIELDS** group, click the **INSERT MERGE FIELD** button. To open the insert merge field dialog
- ii. In the **INSERT MERGE FIELD** dialog box, (To select address fields that will automatically correspond to fields in your data source, even if the data source's fields don't have the same name as your fields), click **ADDRESS FIELDS**.
- iii. To select fields that always take data directly from a column in your data file, click **DATABASE FIELDS**.
- iv. In the **FIELDS** box, click the field you want.
- v. Click **INSERT**, and then click **CLOSE**.
- vi. If the **MATCH FIELDS** dialog box appears, Word may have been unable to find some of the information that it needs for the address block. (See above how to match fields.)



*If you insert a field from the **DATABASE FIELDS** list and then later switch to a data source that doesn't have a column with the same name, Word won't be able to insert that field information into the merged document.*

Custom Fields From Outlook Contacts

The only way to include custom contact fields in your main document is to start the mail merge from within Outlook. First, set up a view of your contacts with the fields that you want to use in the merge. Then, start the mail merge. After you choose the settings that you want, Word will automatically open, and you can complete the merge.

➤ To Set up a view of your contacts that includes custom fields

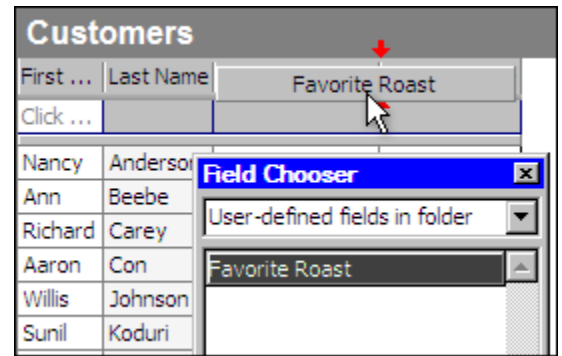
Mouse

- i. In **OUTLOOK CONTACTS**, on the **VIEW** menu, point to **CURRENT VIEW**, and then click **PHONE LIST**.



- ii. Right-click a column heading, and then click **FIELD CHOOSER**.
- iii. In the drop-down list at the top of the **FIELD CHOOSER** dialog box, select **USER-DEFINED FIELDS IN FOLDER**.
- iv. Drag the field that you to add from the dialog box to the column headings. A little red arrow helps you place the field in the location that you want.

*You can add a new field in the **FIELD CHOOSER** dialog box by clicking **NEW** at the bottom.*



- v. After you add all of your custom fields to the view, close the **FIELD CHOOSER** dialog box.
- vi. To remove a field that you do not want included in the mail merge, click the field name in the column heading in Phone List view, and drag it off of the column heading.

Run Mail Merge From Outlook

In Outlook Contacts, select individual contacts by pressing **SHIFT** and clicking to select a range or by pressing **CTRL** and clicking to select individuals. If you want to include all the contacts currently visible in the view, do not click on any contacts.

- i. On the **TOOLS** menu, click **MAIL MERGE**.
- ii. If you have selected individual contacts to include in the merge, click **ONLY SELECTED CONTACTS**. If you want to include all the contacts currently visible in the view, click **ALL CONTACTS IN CURRENT VIEW**.
- iii. If you have configured the Phone List view so that it displays exactly the fields you want to use in the merge, click **CONTACT FIELDS IN CURRENT VIEW**. Otherwise, click **ALL CONTACT FIELDS** to make all of the contact fields available in the merge.
- iv. If you want to generate a new main document for the merge, click **NEW DOCUMENT**. Otherwise, click **EXISTING DOCUMENT**, and click **BROWSE** to locate the document to use as the main document.
- v. If you want to save the contacts and fields that you have selected, so that they can be reused, select the **PERMANENT FILE** check box, and then click **BROWSE** to save the file. The data is saved in a Word document as comma-delimited data.
- vi. Select any merge options you want:
 - ✳ **FORM LETTERS** Prepare a batch of letters for a mass mailing.
 - ✳ **MAILING LABELS** Set up address labels for a mass mailing.
 - ✳ **ENVELOPES** Set up envelopes for a mass mailing.
 - ✳ **CATALOGUE** Create a single document that contains a catalog or address list.
 - ✳ **NEW DOCUMENT** Generate merged documents, which you can edit individually in Word.
 - ✳ **PRINTER** Send merged documents directly to the default printer.
 - ✳ **E-MAIL** Generate merged documents designed to be e-mail messages. When you are ready to complete the merge in Word, on the **MAILINGS** ribbon in the **FINISH** group, click **FINISH & MERGE**, and then click **SEND E-MAIL**.



MESSAGES. The **SUBJECT** line is filled with the text you typed in the **MAIL MERGE CONTACTS** dialog box in Outlook.

- vii. Click **OK**. When the document opens in Word, on the **MAILINGS** ribbon, in the **WRITE & INSERT FIELDS** group, click the arrow next to **INSERT MERGE FIELD**, and then click the fields that you want to add the document.

*You can't type merge field characters (« ») manually or use the **SYMBOL** command on the **INSERT** ribbon. You must use mail merge.*

*If the merge fields appear inside braces, such as { MERGEFIELD City }, then Microsoft Word is displaying field instead of field. This doesn't affect the merge, but if you want to display the results instead, right-click the field code, and then click **TOGGLE FIELD CODES** on the shortcut menu.*

Format Merged Data

Database and spreadsheet programs, such as Microsoft Office Access and Microsoft Office Excel, store the information that you type in cells as raw data. Formatting that you apply in Access or Excel, such as fonts and colours, isn't stored with the raw data. When you merge information from a data file into a Word document, you are merging the raw data without the applied formatting.

To format the data in the document, select the mail merge field and format it, just as you would format any text. Make sure that the selection includes the chevrons (« ») that surround the field.

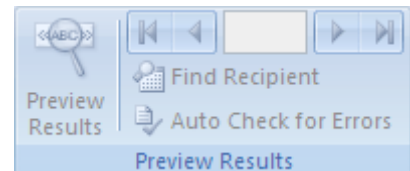
Preview The Merge

After you add fields to your main document, you are ready to preview the merge results. When you are satisfied with the preview, you can complete the merge.

➤ To Preview the merge

You can preview your merged documents and make changes before you actually complete the merge.

To preview, do any of the following in the **PREVIEW RESULTS** group of the **MAILINGS** ribbon:



- ☀ Click **PREVIEW RESULTS**.
- ☀ Page through each merged document by using the **NEXT RECORD** and **PREVIOUS RECORD** buttons in the **PREVIEW RESULTS** group.
- ☀ Preview a specific document by clicking **FIND RECIPIENT**.

*Click **EDIT RECIPIENT LIST** in the **START MAIL MERGE** group on the **MAILINGS** ribbon to open the **MAIL MERGE RECIPIENTS** dialog box, where you can filter the list or clear recipients if you see records that you don't want to include.*

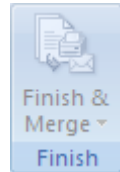


Completing The Merge

You can print the merged documents or modify them individually. You can print or change all or just a subset of the documents.

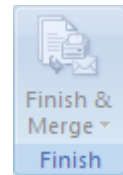
➤ To Print the merged documents

- i. On the **MAILINGS** ribbon, in the **FINISH** group, click **FINISH & MERGE**, and then click **PRINT DOCUMENTS**.
- ii. Choose whether to print the whole set of documents, only the copy that's currently visible, or a subset of the set, which you specify by record number.



➤ To Change individual copies of the document

- i. On the **MAILINGS** ribbon, in the **FINISH** group, click **FINISH & MERGE**, and then click **EDIT INDIVIDUAL DOCUMENTS**.
- ii. Choose whether you want to edit the whole set of documents, only the copy that's currently visible, or a subset of the set, which you specify by record number. Word saves the copies that you want to edit to a single file, with a page break between each copy of the document.



➤ To Save the main document

Remember that merged documents that you save are separate from the main document. It's a good idea to save the main document itself if you plan to use it for another mail merge.

When you save the main document, you also save its connection to the data file. The next time that you open the main document, you are prompted to choose whether you want the information from the data file to be merged again into the main document.

- ☀ If you click **YES**, the document opens with information from the first record merged in.
- ☀ If you click **NO**, the connection between the main document and the data file is broken. The main document becomes a standard Word document. Fields are replaced with the unique information from the first record.



Troubleshooting

Tips for working with Microsoft Outlook Contacts list

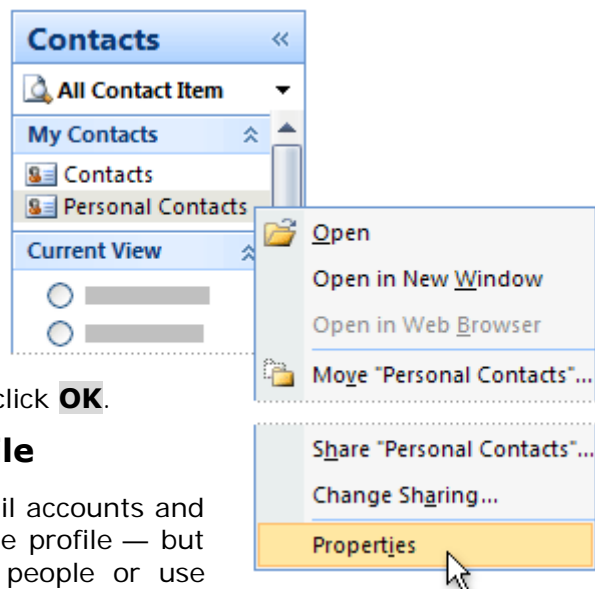
Connecting to your Outlook Contacts folder is usually a straightforward process, but sometimes you may encounter a problem. Here are solutions to common problems that you may encounter:

- ☀ I can't find my Outlook Contacts folder to connect to it.
- ☀ I get error messages about mail clients and tables.
- ☀ I can't connect to an Outlook Contacts folder in Public Folders.
- ☀ I want to use my Outlook Express address book as my Contacts folder, but I can't connect to it.

➤ Turn on the Show this folder as an e-mail Address Book property

Mouse

- i. In Microsoft Office Outlook, on the **GO** menu, click **CONTACTS**.
- ii. Right-click the **CONTACTS** folder that contains the information that you want to use for a mail merge, and then click **PROPERTIES**
- iii. On the **OUTLOOK ADDRESS BOOK** tab, make sure that the **SHOW THIS FOLDER AS AN E-MAIL ADDRESS BOOK** check box is selected, and then click **OK**.



➤ To change your Outlook user profile

An Outlook user profile is a group of e-mail accounts and address books. Usually, you need only one profile — but if you share your computer with other people or use different address books for different purposes, you can set up more than one profile. If, when you start your mail merge, you're using a profile that doesn't include the Contacts folder that you want to use, that folder won't be available.

To switch to a different user profile, restart Outlook. When you're prompted for a profile, choose the profile that includes the Contacts folder that you want to use in the mail merge.

If you aren't prompted for a profile and you know that you have more than one, you may want to set up Outlook so that it prompts you. To do this:

Mouse

- i. Close Outlook.
- ii. In Control Panel, switch to Classic View, and then click **MAIL**.
- iii. Click **SHOW PROFILES**.
- iv. To be prompted to select a profile each time you start Outlook, click **PROMPT FOR A PROFILE TO BE USED**, and then click **OK**.



➤ **I get error messages about mail clients and tables**

If you try to connect to your Contacts folder during a mail merge in Word, and Outlook is not set up as your default e-mail program in Windows Internet Explorer, you will get an error message that says:

"Either there is no default mail client or the current mail client cannot fulfill the messaging request. Please run Microsoft Office Outlook, and set it as the default mail client."

➤ **To avoid getting this message during a mail merge.**

Mouse

- i. Exit Word.
- ii. On the Internet Explorer **TOOLS** menu, click **INTERNET OPTIONS**, and then click the **PROGRAMS** tab.
- iii. Under **E-MAIL**, click **MICROSOFT OFFICE OUTLOOK**, and then click **OK**.
- iv. Start Word again, open your mail merge document, and connect to your Outlook Contacts folder.

I can't connect to an Outlook Contacts folder in Public Folders

If you start a mail merge in Word and try to connect to an Outlook Contacts folder in **PUBLIC FOLDERS**, you get an error message that says:

"The operation cannot be completed because of dialog or database engine failures. Please try again later."

If you try again later, you get the same error message.

To use a Public Folders Contacts folder as the data file for your mail merge, you have to start the mail merge from within Outlook.

➤ **To use my Outlook Express address book as my Contacts folder**

You can't connect to this type of address book directly during a merge. Instead, export your Outlook Express address book as a .csv text file and then connect to it in that form.

➤ **To Export your Outlook Express address book:**

- i. Start Microsoft Outlook Express.
- ii. On the **FILE** menu, point to **EXPORT**, and then click **ADDRESS BOOK**.
- iii. In the **ADDRESS BOOK EXPORT TOOL** dialog box, click **TEXT FILE (COMMA SEPARATED VALUES)**, and then click **EXPORT**.
- iv. In the **SAVE EXPORTED FILE AS** box, type a file name for your exported file, and then click **BROWSE**.
- v. In the **SAVE AS** dialog box, in the **SAVE IN** list, choose where you want to save the file, and then click **SAVE**. It's handy to save data files in the **MY DATA SOURCES** folder in your **MY DOCUMENTS** folder. That's where Word looks first for data files when you browse for them during a merge.
- vi. Click **NEXT**. Select the check boxes next to the fields that you want to export, and then click **FINISH**.

When you are deciding which fields to export, think about the form letters or e-mail messages or labels that you intend to create with mail merge. E.G. if you never include nicknames or personal Web sites in your merged documents, don't export those fields.



- vii. When you receive the message that the export procedure is completed, click **OK**.
- viii. To close the **ADDRESS BOOK EXPORT TOOL** dialog box, click **CLOSE**, and then exit Outlook Express.

Tips For Formatting Data In Excel

If your data file is an Excel worksheet that includes percentages, currency values, or postal codes, you can preserve the numeric formatting of the data by using Dynamic Data Exchange to connect to the Excel worksheet from Word. E.G. you can make sure a five-digit postal code of 07865 from your data file is not displayed as the number 7865 (without the leading zero).

Before you connect to the worksheet, do the following in Word:



- i. Click the **OFFICE BUTTON**, and then click **WORD OPTIONS**.
- ii. Click **ADVANCED**.
- iii. Scroll to the **GENERAL** section, and select the **CONFIRM FILE FORMAT CONVERSION ON OPEN** check box.
- iv. Click **OK**.
- v. With the mail merge main document open, in the **START MAIL MERGE** group of the **MAILINGS** ribbon, click **SELECT RECIPIENTS**, and then click **USE EXISTING LIST**.
- vi. Locate the Excel worksheet in the **SELECT DATA SOURCE** dialog box, and double-click it.
- vii. In the **CONFIRM DATA SOURCE** dialog box, click **MS EXCEL WORKSHEETS VIA DDE (*.xls)**, and then click **OK**.

If you don't see MS Excel Worksheets via DDE (.xls), select the Show all check box.*
- viii. In the **MICROSOFT OFFICE EXCEL** dialog box, for **NAMED OR CELL RANGE**, select the cell range or worksheet that contains the information that you want to merge, and then click **OK**.

*To prevent being prompted every time you open a data file, you can turn off the **CONFIRM CONVERSION AT OPEN** option after you have connected to the worksheet.*

*If you don't have a data file yet, click **TYPE A NEW LIST**, and then use the form that opens to create your list. The list is saved as a database (.mdb) file that you can reuse.*

If you installed 2007 Microsoft Office system (instead of installing Microsoft Word by itself), you can also use Microsoft Query to construct a query and retrieve the data you want from an external data source.



SECTION 7 CROSS-REFERENCES

By the end of this section you will be able to:

- ✦ Create cross-references to page numbers
- ✦ Create cross-references to heading text
- ✦ Create cross-references using bookmarks
- ✦ Update cross-references
- ✦ Delete cross-references



Cross-Referencing Text

The cross-referencing feature in Word enables you to refer to the page number of a heading or a bookmark in a document. E.G. "for more information on Indexes see page 46". You can also use cross-references to refer to the actual text.

The advantage of using cross-referencing is that the results are stored in a field. This means that if the referenced text is moved to another page, the cross-reference can be updated by simply updating the field.

If your cross-reference needs to refer to the page number of a particular item, (e.g. "see index on page 78"), the method described below will automatically produce the relevant page number.

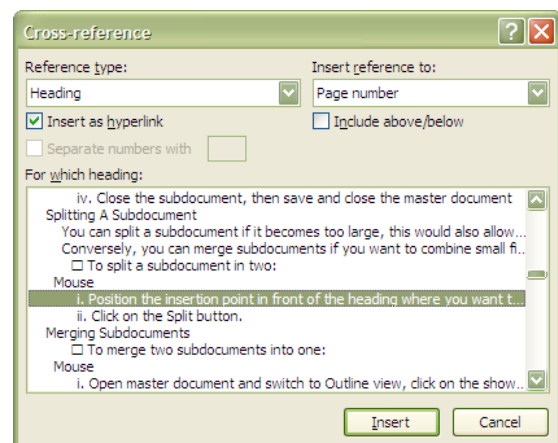
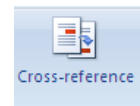
Heading Cross-References

If you are using the standard Word Heading Level styles (Heading 1-9) in a document, then you can use cross-references to refer to the page number, heading number and the text of any of the headings.

➤ To produce a cross-reference to a page number:

Mouse

- i. Type in the required introductory text.
E.G "see Indexes on page"
- ii. Then select the **CROSS REFERENCE** button in the **LINKS** group on the **INSERT** ribbon, a dialog appears
- iii. Select Heading in the **REFERENCE TYPE:** list
- iv. Select **PAGE NUMBER** from the **INSERT REFERENCE TO:** list
- v. Select the name of the required heading in the **FOR WHICH HEADING:** list
- vi. Click on the **INSERT** button



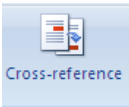
The generated page number is a **{PAGEREF}** field. To view the field, highlight the number and press **SHIFT F9**. Word automatically creates a numbered reference in the field code; this number uniquely relates to the selected heading. The field code would look similar to this:

{PAGEREF _Ref440091741}

*Cross-references can be inserted as hyperlinks, i.e., when you position your mouse over the field, the mouse pointer turns into a pointing hand. If you were to click, you would be transported to that location. If you don't want the Cross-reference as a hyperlink, be sure to uncheck the **INSERT AS HYPERLINK** box in the Cross-reference dialog.*



Heading Text

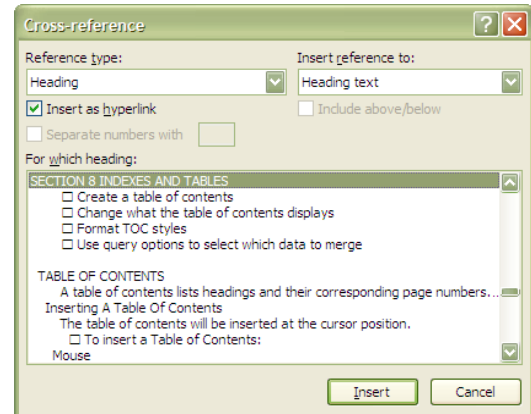


A heading text reference displays the actual text. In the previous example "see Indexes on page 46", the text "Indexes" can also be cross-referenced from the heading.

➤ To insert a cross-reference to a heading:

Mouse

- Select the **CROSS REFERENCE** button in the **LINKS** group on the **INSERT** ribbon, a dialog appears
- Select **Heading** in the **REFERENCE TYPE:** list
- Select **HEADING TEXT** in the **INSERT REFERENCE TO:** list
- Choose the name of the required heading in the **FOR WHICH HEADING:** list
- Click on the **INSERT** button



Bookmark Cross-References

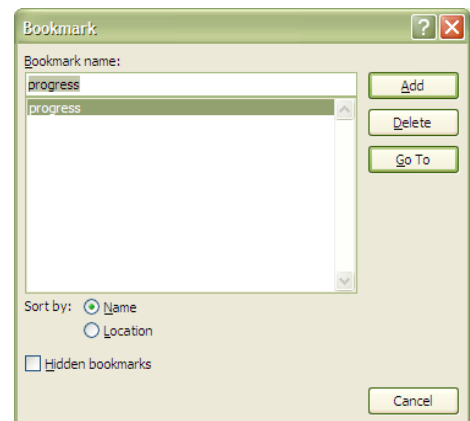


Bookmarks should be used when you want to reference a piece of text, which is not formatted with one of the standard Heading styles.

➤ To create a bookmark:

Mouse

- Select the text where you want to create the bookmark
- Choose **BOOKMARK** from the **INSERT** ribbon, **LINKS** group.
- Type in a name for the bookmark and click on the **ADD** button



A bookmark name cannot contain spaces, must not begin with a number, but can have up to a maximum of forty characters.

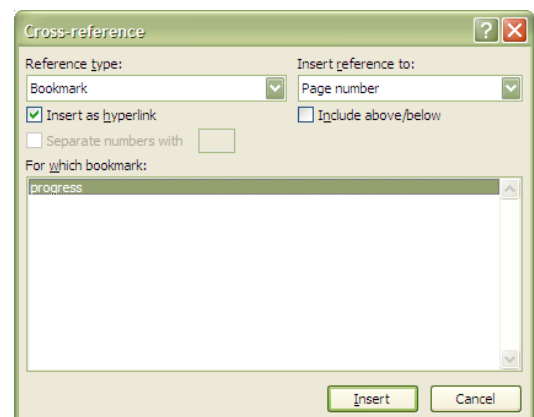
Referencing A Bookmark

The procedure is similar to referencing Headings.

➤ To create a bookmark cross-reference:

Mouse

- Select the **CROSS REFERENCE** button in the **LINKS** group on the **INSERT** ribbon
- Select **Bookmark** from the **REFERENCE TYPE:** list
- Select either **BOOKMARK TEXT** or **PAGE NUMBER** depending on the reference required





- vii. Choose the Bookmark from the **FOR WHICH BOOKMARK:** list and click on the **INSERT** button.

Updating Cross-References

Cross-references may need to be updated if the text they are relating to is moved on to a different page or if the text altered.

➤ To update a cross-reference:

Keyboard

- i. Click in or select the generated cross-reference field
- ii. Press **F9**

Or

Mouse

- i. Right click the cross reference field containing the page number or heading text.
- ii. Select **UPDATE FIELD** from the menu

*If you want to update all the cross-references in the document, first select the document and then press **F9**. Any other fields in the document will also be updated.*

Deleting A Cross Reference

➤ To delete a cross reference

Keyboard

- i. Highlight the cross reference field
- ii. Press **DELETE** on the keyboard

*If the field was not selected in its entirety then you may need to press the **DELETE** key twice*



SECTION 8 INDEXES AND TABLES

By the end of this section you will be able to:

- ✦ Create a table of contents
- ✦ Change what the table of contents displays
- ✦ Format TOC styles
- ✦ Use query options to select which data to merge
- ✦ Build and maintain a bibliography and insert citations.



TABLE OF CONTENTS

A table of contents lists headings and their corresponding page numbers. Word provides some preset table of contents layouts, which enable you to quickly insert a table in your document. The table can be based on standard Heading Level Styles, user-defined styles or a combination of both.

Inserting A Table Of Contents

The table of contents will be inserted at the cursor position.

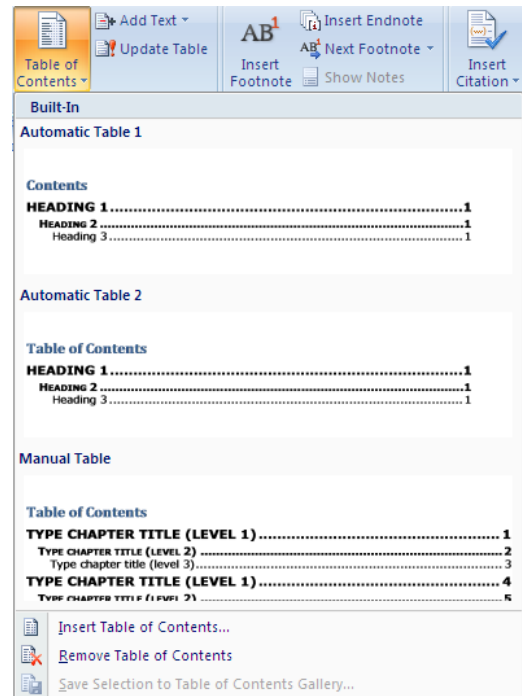
➤ To insert a Table of Contents:

Mouse

- Click on the **REFERENCES** ribbon and go to the **TABLE OF CONTENTS** group. Click on the **TABLE OF CONTENTS** button to display a menu.
- If you have used standard heading styles within your document and need no customisation to your Table of contents, you may make a selection from one of the preset styles displayed.
- Your table of contents will be inserted.

However

- If you need some customisation select the **INSERT TABLE OF CONTENTS** choice at the end of the menu. A dialog will appear.

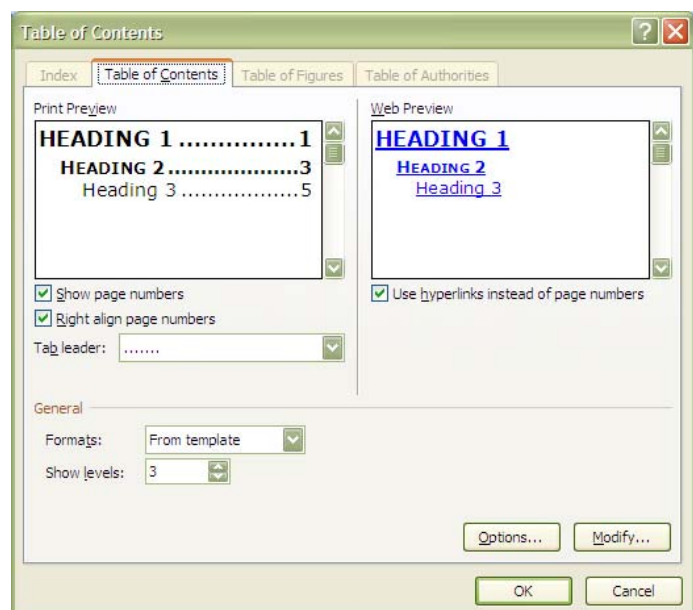


✱ In the **GENERAL** section click on the drop down box to display different **FORMATS** (Classic, Distinctive, Fancy etc.), a preview is displayed on the top left. For each format, you can also modify some standard options:

✱ **SHOW PAGE NUMBERS** displays the page number for each heading

✱ **RIGHT ALIGN PAGE NUMBERS** aligns page numbers with the right margin

✱ **SHOW LEVELS** use this to specify how many heading levels to include in the table of contents. The default is 3, which means Headings 1-3 are displayed.





- ✱ **TAB LEADER** choose whether to have a blank space, dots, dashes or a solid line between the headings and the page numbers

- v. Click on **OK** to insert the table of contents.

INTRODUCTION.....	7
How to use this guide.....	7
Objectives.....	7
Instructions	7
Appendices.....	7
Keyboard.....	7
Commands	8
Notes.....	8
Tips.....	8
SECTION 1	9
USING ADVANCED TABS AND TABLES	9

*The table of contents displays all the headings up to the value specified for **SHOW LEVELS**. Each heading and number is a separate paragraph, formatted using Word's TOC styles. Unless you specify otherwise, Heading 1 text uses TOC 1 style in the table of contents, Heading 2 uses TOC 2 style and so on.*

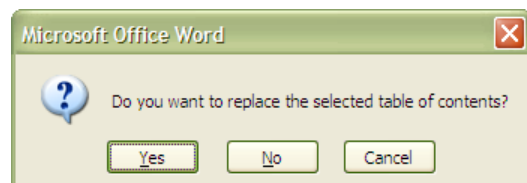
Modifying The Table Of Contents

The Table of Contents may need to be altered when you see the initial results.

- **To change the number of heading levels to display in the table of contents:**

Mouse

- i. Click in the table.
- ii. Click on the **REFERENCES** ribbon and go to the **TABLE OF CONTENTS** group. Click on the **TABLE OF CONTENTS** button to display a menu. Select **INSERT TABLE OF CONTENTS** choice at the end of the menu to display dialog.
- iii. Change the **SHOW LEVELS** field and click on **OK**.
- iv. You will be prompted as to whether you want to replace the old table of contents with the new one. Click on **OK** to update the table.



Displaying User-Defined Headings Styles.

Using the **SHOW LEVELS** field means that you have to show at least Heading 1 text in the table of contents. However you may want to show Heading 2-3 text but not Heading 1.

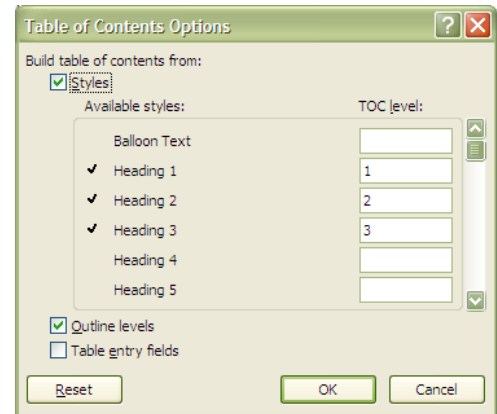
- **To choose which headings to use:**

Mouse

- i. Click on the **REFERENCES** ribbon and go to the **TABLE OF CONTENTS** group. Click on the **TABLE OF CONTENTS** button to display a menu. Select **INSERT TABLE OF CONTENTS** choice at the end of the menu to display dialog.



- ii. Click on the **OPTIONS** button
- iii. The **OPTIONS** dialog displays a number next to the Headings included in the table of contents. The TOC Level numbers tell Word which TOC style to apply to each Heading in the final table; typically Heading 1 is TOC 1, Heading 2 is TOC 2 and so on.
- iv. Delete the TOC level number next to Heading 1 (the tick automatically disappears)
- v. Change the TOC level numbering for the other styles; E.G. to begin the Table of Contents listing using Heading 2 headings, change Heading 2 to TOC 1 and Heading 3 to TOC 2



You do not have to alter the other TOC level numbering, Heading 2 can be left as TOC 2, but the final Table of Contents may not then be as easy to read.

- vi. Click on **OK** to return to the **INDEX AND TABLES** dialog, then **OK** to insert the table (Word prompts you to replace the old table)

Redisplaying Standard Heading Styles

In the table of contents, you can choose to display headings formatted with a style, which you have created. Repeat the process for changing the Headings. In the Options dialog, type a TOC level number next to the style(s) you want to use - these styles can be the ones you have created as well as or instead of the standard Heading Styles.

Resetting To Display Heading Styles

When you change the styles to display, the **SHOW LEVELS** box disappears in the **INDEX AND TABLES** dialog, this is because the Table of Contents will use the styles selected in the **OPTIONS** dialog.

➤ To go back to using only Heading Styles:

Mouse

- i. In the **INDEX AND TABLES** dialog, click on the **OPTIONS** button
- ii. Click on the **RESET** button

The **SHOW LEVELS** box then reappears when you have clicked on **OK**.

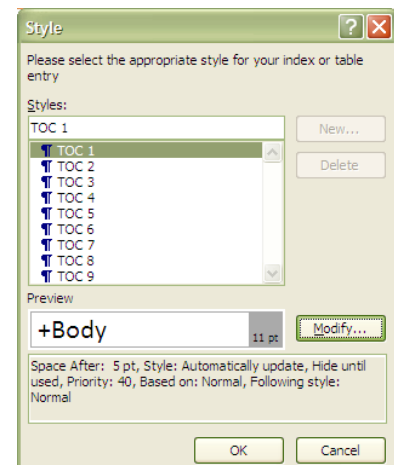
Customising The Toc Levels

In the Insert, **INDEX AND TABLES** dialog, you can choose from 6 preset tables of contents styles. However, you may want to create a customised look.

➤ To create a custom Table of Contents:

Mouse

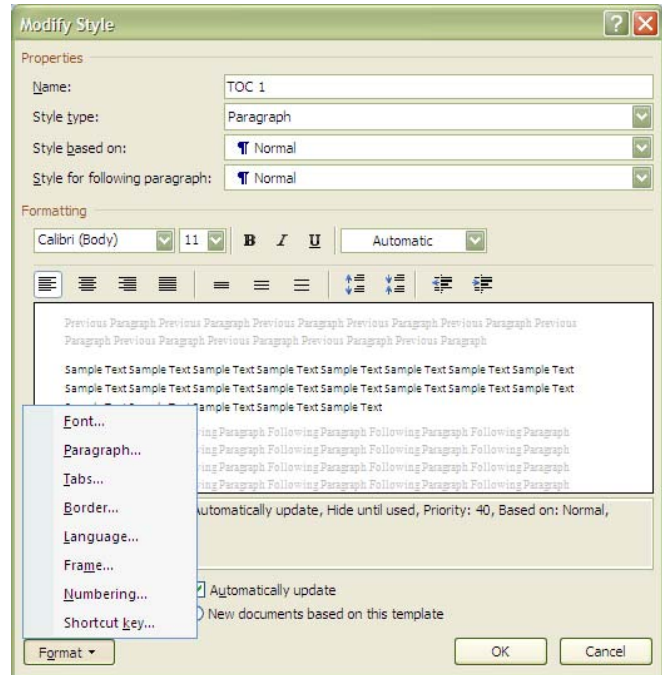
- i. Display the **TABLE OF CONTENTS** dialog, select the **MODIFY** button
- ii. A **STYLE** dialog is displayed, listing only the nine TOC level styles. To change the formatting of one of the TOC styles: Select the style





- iii. Click on the **MODIFY** button
- iv. In the Modify Style dialog, use the **FORMAT** button to change the formatting. Such as paragraph, font numbering tabs etc. Each selection displays a dialog box with all choices necessary to fully customise you TOC level style. Click on **OK** when finished. Then either select another TOC style to modify, or close the **STYLE** dialog to return to the main **TABLE OF CONTENTS** dialog.

You can also modify the TOC styles by following the process outlined in the "Redefining Standard Styles" Section.



Updating The Table Of Contents

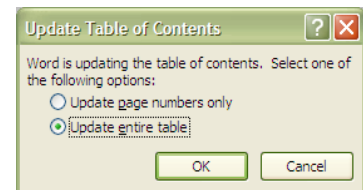
The TOC field is the underlying element of a table of contents. If after inserting a table of contents, you then modify the document, you may need to update the table.

➤ To update a Table of Contents:

Keyboard

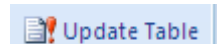
- i. Click in or select the table, then press **F9**
- ii. You will be prompted to either **UPDATE PAGE NUMBERS ONLY**, or to **UPDATE ENTIRE TABLE**.

Updating the page numbers is faster and can be used if the page numbers is the only part which has changed.



Or

Mouse



- iii. Click on the **REFERENCES** ribbon and go to the **TABLE OF CONTENTS** group. Click on the **UPDATE TABLE** button to display the **UPDATE TABLE OF CONTENTS** dialog as above.
- iv. Make a selection click **OK**.

Manually Adding And Removing Entries.

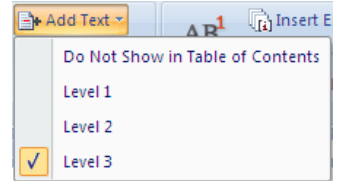
A new little tool in Word 2007 is the **ADD TEXT** to table of contents tool found in the **TABLE OF CONTENTS** group on the **REFERENCES** ribbon. This allows you to manually go through your document selecting headings and either adding them to a particular toc level or removing them from the Table of contents all together. Since your table of contents is based on styles however, this tool will change the formatting of the selected heading to whatever TOC level you apply to it. E.G. if a heading is assigned as a level 2 TOC entry it will assume the format of the heading 2 style.



➤ To manually assign headings to the Table of contents

Mouse

- i. Click on a heading that is not yet in your table of contents that you wish to appear there.
- ii. Click on the **ADD TEXT** button on the **REFERENCES** ribbon in the **TABLE OF CONTENTS** group.
- iii. Decide what level you wish that heading to appear at, and make the relevant choice.
- iv. The heading format of the selected heading will change to the assigned levels heading format.
- v. Update table.



*Similarly if there is a heading in your table of Contents that you don't wish to appear there then go to the heading within the document and make the choice from the list for it not to appear in the table of contents. You may format any changed heading manually yo whatever you wish **DO NOT CHANGE THE STYLE ASSIGNED TO IT THOUGH. MERELY MANUALLY FORMAT THE TEXTS APPEARANCE.***

The Toc Field

To display the TOC field code, click in the table of contents and press **SHIFT F9**.

{TOC \O "1-3"}

The \O "1-3" part of the field is a switch telling you which Heading Level styles the table of contents is searching for. There are other switches that you can include in this field. Two of the useful switches are described below:

\t Include this to add styles other than the Heading level styles. E.G. ITOC \t "chaptertitle,l,chapterhead,2"} builds a table of contents using paragraphs having the styles "chaptertitle" and "chapterhead." The number following each style name identifies the TOC entry level to assign the style in the table of contents.

You can use the \o switch and the \t switch together to build a table of contents using a combination of built-in and user-defined styles.

\rl Builds a table of contents without page numbers. If a range of entry levels, such as "1-2," is specified, the TOC field builds a table of contents without page numbers for those entry levels. To suppress page numbering of TOC 1 entries, add the switch \n " 1 - 1 "

If you directly edit the field code, you should then press F9 to update the field



INDEXES

To create an Index in Word, you first have to decide what text you want to appear in the index. This is done by marking text entries in your document. When you have marked the text, you can then insert the index (similar to inserting a table of contents).

Marking Entries

There are two ways to mark text in your document so that it is included in the index. Either use the Mark Entry option in the Index and Tables dialog for each entry, or create a document containing all the entries that you want included in the index and use the AutoMark feature.

➤ To mark an entry for indexing:

Mouse

- i. Select the text to be marked
- ii. Select the **MARK ENTRY** button from the **INDEX** group on the **REFERENCES** ribbon

Or

Keyboard

- iii. Press **ALT SHIFT X**
- iv. The subsequent dialog box that shows and its options are described below:-
- v. When you have selected all the required options, (below) click on the **MARK** button to mark the text as an index entry



The dialog box 'Mark Index Entry' has the following fields and options:

- Index** section:
 - Main entry:
 - Subentry:
- Options** section:
 - ☐ Cross-reference:
 - ☒ Current page
 - ☐ Page range
 - Bookmark:
- Page number format** section:
 - ☐ Bold
 - ☐ Italic
- Footer text: "This dialog box stays open so that you can mark multiple index entries."
- Buttons: **Mark**, **Mark All**, **Cancel**

Main Entry

The Main entry: will be the text that you highlighted. You can change this if you want to display something slightly different in the final index. Typically you may just want to change the capitalisation of the text.

Subentry

This allows you to create a second level entry in the index. E.G. in this document there might be a Main Entry of "Table of Contents", whereas the Subentry might be "Updating the Table".

If you want to include a third level entry, after the Subentry type a colon ":" and the type the next subentry.

Options

CROSS-REFERENCE Use this if you want the entry to cross-reference with one of the other entries in the Index. The page number will not be displayed. The index entry might look like "Bookmarks, See Cross References"

CURRENT PAGE This is the default. It includes the page number with the index entry.



PAGE RANGE This allows you to include a bookmark, which covers more than one page, as an entry. For more information on creating a Bookmark see page 34.

The **PAGE NUMBER FORMAT**: options bold and *italic*, allow you to pre-format the page numbers that will appear in the index.

You don't have to close the dialog if you want to continue marking entries:

Mouse

➤ To mark another entry:

Mouse

- i. With the **MARK ENTRY** dialog still showing, click in the document and then find the next index entry
- ii. Select the text
- iii. Then click on the dialog
- iv. Choose any of the required options, then click on **MARK**
- v. When you have finished marking index entries, click on the **CLOSE** button to return to the document.

Mark All

The **MARK ALL** button can be used instead of **MARK** when you want to mark an entry, which occurs several times in the document. This saves you having to mark each occurrence of this text yourself.

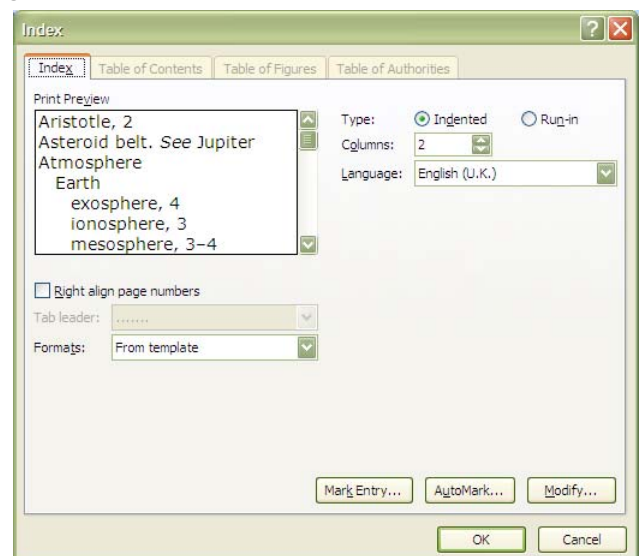
Creating The Index

Once the index entries have been marked, throughout your document you can insert the index.

➤ To display the Index dialog:

Mouse

- i. Position the insertion point where you want the index to appear, this is typically at the end of the document.
- ii. Choose **INSERT INDEX** from the **INDEX** group on the **REFERENCES** ribbon
- iii. Choose the Type of index:
 - ☀ **INDENTED** displays Subentries indented and below the corresponding Main Entry
 - ☀ **RUN-IN** displays Subentries on the same line as the corresponding Main Entry
- iv. Select one of the preset formats (a preview is displayed to the left, some of the formats include a tab leader and right align the page numbers)
- v. Choose the number of columns (max. 4) to format the index with
- vi. Click on **OK**







Customising The Index

The generated Index is formatted using standard Index styles. Letter headings are formatted with the "Index Heading" style, Main Entries with "Index 1" style, Subentries with "Index 2" style and so on.

If you want to modify the style of the index, choose From template from the Formats list, then click on the **MODIFY** button. This displays a Style dialog previewing the available index styles.

Select the required style, then click on the **MODIFY** button and make the required style changes (this process is similar to customising a table of contents).

Alternatively you can modify the styles directly in the document.

Editing And Updating Indexes

You can edit an index by changing individual index entries in the document and then updating the index. E.G. if you wanted to remove an index entry, you would have to delete the original entry and then update the index, or if you added another index entry, then the Index would also need to be updated.

When you mark index entries, Word inserts XE fields in the document. They are entered as hidden text, so to view them you have to click on the Show hidden text tool. The fields are displayed just after the original marked text:

or a bookmark {•XE•"Bookmark"•\b•\i•} in a document

The text which is in "" is the actual text which is displayed in the index. This can be modified, but make sure you only change the text within the "". Subentries can be created, E.G. you might type "Bookmark: Creating"

If you want to delete the index entry, select the field and press DELETE.

There are some switches which can be included with this field:

\b Displays the page number in bold

\i Displays the page number in italics

\r Includes the range of pages marked by the specified bookmark. E.G. the field {XE "Selecting text" \r SelectingText} gives a result such as "Selecting text, 20-25" in the index, where SelectingText is the name of the bookmark.

\t Inserts the text following the switch in place of a page number. Enclose the text in quotation marks. E.G. the field {XE "Highlighting" \t "See Selecting"} gives the result "Highlighting, See Selecting" in the index.

If you do make changes to any of the index entry fields, you should then update the Index.

Updating The Index

➤ To update an index:

Keyboard

- i. Click in or select the index and Press **F9**

or

- i. Click in the index and click on the **UPDATE INDEX** button on the **REFERENCES** ribbon.



Editing The Index

The **INDEX** field is the underlying element of the Index. To display the field code, click in it and press **SHIFT F9**. The field code for a "classic" indented index with 2 columns looks as follows: {INDEX \h "—A--" \c "2"}

The main reason for editing the Index field is to add or remove field switches. Some of the more useful ones are described below:

\c Creates an index with more than one column on a page. E.G. the field {index \c "2"} creates a two-column index. You can specify up to four columns.

\e Defines the separator characters used between an index entry and its page number. You can use up to five characters and they must be enclosed in quotation marks. E.G. the field (index \e "; ") gives a result such as "Inserting text; 3" in the index. The default separator characters are a comma and a space (,).

\g Defines the separator characters used in a page range. You can use up to five characters and they must be enclosed in quotation marks. E.G. the field {index \g " to "} gives a result such as "Finding text, 3 to 4." The default separator character is a hyphen.

\h Inserts headings formatted with the Index Heading style between groups in the index. Enclose the heading in quotation marks, E.G. {index \h "A"} or {index \h "AAA"}. Word automatically advances through the alphabet for each alphabetic group in the index. A space, {index \h " " 1}, inserts a blank line between alphabetic groups.

\l Defines the separator characters used between page numbers for entries with multiple-page references. You can use up to five characters and they must be enclosed in quotation marks.

E.G. the field (index \l " or ") gives a result such as "Inserting text, 23 or 45 or 66" in the index. The default separate

or characters are a comma and a space (,).

\p Limits the index to the specified letters. E.G. the field {index \p a-m} generates an index for only the letters A to M.

\r Runs index subentries onto the same line as the main entry. Main entries are separated from subentries by colons (:) and subentries are separated by semicolons (;). E.G. the field {index \r\} gives a result such as the following: "Text: inserting 5, 9; selecting 2; deleting 15."

Automark

The alternative way of marking index entries is to use the AutoMark feature. First you have to create a separate document, known as an AutoMark file. This file needs to contain the text entries that should be marked for the index, and the corresponding text that you want to display in the index. The text entries are case sensitive. So it is wise to include different combinations of the same text.

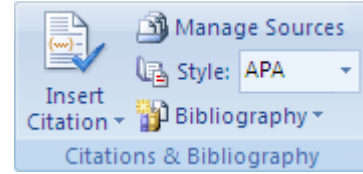
In the AutoMark file, create a table with two columns. Enter the text to be marked in the first column. In the second column enter the corresponding index entries (these will appear as Main Entries in the index). Save the AutoMark file and return to the document where you want to mark the index entries. From the Index and Tables dialog, click on the AutoMark button. This displays an Open Index AutoMark File dialog from which you need to select the name of the AutoMark File.



Once the name of the AutoMark File has been selected, click on **OK**. Word then automatically searches the current document for all instances of the words and phrases contained in the AutoMark File, and marks them as index entries.

CITATIONS AND BIBLIOGRAPHIES

A bibliography is a list of sources, usually placed at the end of a document, that you consulted or cited in creating the document. In Microsoft Office Word 2007, you can automatically generate a bibliography based on the source information that you provide for the document.



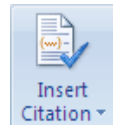
Each time that you create a new source, the source information is saved on your computer, so that you can find and use any source you have created.

Create Citation Sources

When you add a new citation to a document, you also create a new source that will appear in the bibliography.

➤ To create a new source

Mouse



- i. On the **REFERENCES** ribbon, in the **CITATIONS & BIBLIOGRAPHY** group, click **INSERT CITATION**.
- ii. To add the source information, click **ADD NEW SOURCE**. A dialog will appear

- iii. Begin to fill in the source information by clicking the arrow next to **TYPE OF SOURCE**. E.G. your source might be a book, a report, or a Web site.
- iv. Fill in as much information as you have available this source can be edited at any time. To add more information about a source, click the **SHOW ALL BIBLIOGRAPHY FIELDS** check box.
- v. This source can be inserted many times within your document it will appear in the **INSERT CITATION** Menu.

*To find additional sources, or additional information about sources that you are citing, click **INSERT CITATIONS**, and then click **SEARCH LIBRARIES**. For example, you can search a library database for every match of a particular topic in that library's collection. Then, with a single click, you can insert the citation in the document, or you can add the source information to the current list of sources for later use.*



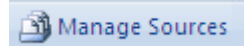
*If you choose a **GOST** or **ISO 690** style for your sources and a citation is not unique, append an alphabetic character to the year. For example, a citation would appear as [Pasteur, 1848a].*

*If you choose **ISO 690-Numerical Reference** and your citations still don't appear consecutively, you must click the **ISO 690** style again, and then press **ENTER** to correctly order the citations.*

Manage Sources

The list of sources that you consult or cite can become quite long. At times you might search for a source that you cited in another document by using the **MANAGE SOURCES** command.

➤ To manage citation sources



Mouse

- i. On the **REFERENCES** ribbon, in the **CITATIONS & BIBLIOGRAPHY** group, click **MANAGE SOURCES**.
- ii. If you open a new document that does not yet contain citations, all of the sources that you used in previous documents appear under **MASTER LIST**.

*If you open a document that includes citations, the sources for those citations appear under **CURRENT LIST**, and all sources that you have cited, either in previous documents or in the current document, appear under **MASTER LIST**.*

- iii. To find a specific source, either:

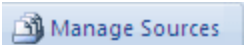
- ☀ In the sorting box, sort by author, title, citation tag name, or year, and then search the resulting list for the source that you want to find.
- ☀ In the **SEARCH** box, type the title or author for the source that you want to find. The list dynamically narrows to match your search term.

*You can click the **BROWSE** button in **SOURCE MANAGER** to select another master list from which you can import new sources into your document. For example, you might connect to a file on a share, on a research colleague's computer or server, or on a Web site that is hosted by a university or research institution.*

Edit A Citation Placeholder

Occasionally, you may want to create a placeholder citation, and then wait until later to fill in the complete bibliography source information. Any changes that you make to a source are automatically reflected in the bibliography, if you have already created one. A question mark appears next to placeholder sources in Source Manager.

➤ To edit a placeholder



Mouse

- i. To add a placeholder, so that you can create a citation and fill in the source information later, click **ADD NEW PLACEHOLDER**. A question mark appears next to placeholder sources in **SOURCE MANAGER**.
- ii. On the **REFERENCES** ribbon, in the **CITATIONS & BIBLIOGRAPHY** group, click **MANAGE SOURCES**.
- iii. Under **CURRENT LIST**, click the placeholder that you want to edit.



Placeholder sources are alphabetized in Source Manager, along with all other sources, based on the placeholder tag name. Placeholder tag names are numbers by default, but you can customize the placeholder tag name with whatever tag you want.

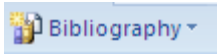
- iv. Click **EDIT**.
- v. Begin to fill in the source information by clicking the arrow next to **TYPE OF SOURCE**.
- vi. Fill in the bibliography information for the source. Use the **EDIT** button to fill in fields instead of having to type names in the appropriate format. To add more information about a source, click the **SHOW ALL BIBLIOGRAPHY FIELDS** check box.

Create A Bibliography

You can create a bibliography at any point after you insert one or more sources in a document. If you don't have all of the information that you need about a source to create a complete citation, you can use a placeholder citation, and then complete the source information later.

Placeholder citations do not appear in the bibliography.

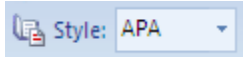
➤ To create a bibliography

- i. Click where you want to insert a bibliography, usually at the end of the document.
- ii. On the **REFERENCES** ribbon, in the **CITATIONS & BIBLIOGRAPHY** group, click **BIBLIOGRAPHY**. 
- iii. Click a predesigned bibliography format to insert the bibliography into the document.

Changing The Style Of The Bibliography

➤ To change the style of the Bibliography

Mouse

- i. Click within your bibliography
- ii. On the **REFERENCES** ribbon, in the **CITATIONS & BIBLIOGRAPHY** group, click the arrow next to **STYLE**. 
- iii. Click the style that you want to use for the citation and source. E.G. social sciences documents usually use the **MLA** or **APA** styles for citations and sources.



SECTION 9 FOOTNOTES AND ENDNOTES

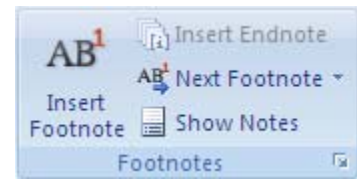
By the end of this section you will be able to:

- ✦ Insert footnotes and endnotes in a document
- ✦ View and edit footnotes and endnotes
- ✦ Delete footnotes and endnotes
- ✦ Customise footnotes and endnotes



USING FOOTNOTES

Footnotes and Endnotes are used to provide additional information about a word or phrase within a document. The text is marked with a small, superscripted number. If you insert a footnote, the associated text can be placed either at the bottom of the page or beneath the last paragraph of text on the page. An endnote can be displayed either at the end of the section or at the end of the whole document. Both footnotes and endnotes are separated from the remainder of the text by a small horizontal line.



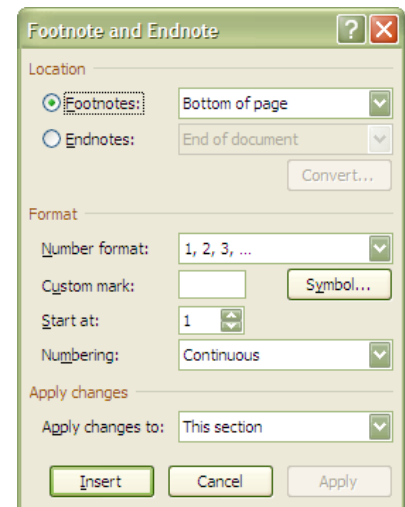
Inserting Footnotes

Footnotes can be inserted in any of Word's standard views

➤ To insert a footnote:

Mouse

- i. Position the insertion point after the word to be referenced, or select the text.
- ii. Choose the **FOOTNOTE** dialog launcher from the **FOOTNOTES** group on the **REFERENCES** ribbon to open the **FOOTNOTE AND ENDNOTE** dialog
- iii. Word, by default, suggests the Footnote will be placed at the bottom of the page and that it will be numbered automatically using the next number in the series.
- iv. Click on **OK** to insert the footnote



Or Mouse

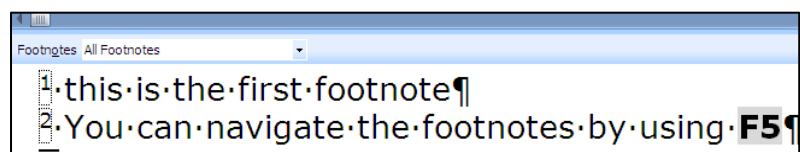
- i. Position the insertion point after the word to be referenced, or select the text.
- ii. Click on the **INSERT FOOTNOTE** button and type footnote text.
- iii. Double click the footnote number to take you back to your correct position in the document.



*If you are in **DRAFT** or **OUTLINE** view when you insert a footnote, a **FOOTNOTE PANE** window is opened. (If you are in **PRINT LAYOUT** view, Word takes you to the bottom of the page). Type in the text for the footnote in the windowpane, click on the **CLOSE** button to return to the document*

Viewing Footnotes

You will always be able to view and edit your footnotes when you are working in **PRINT LAYOUT** view. However if you are in **DRAFT** or **OUTLINE** View you should choose **SHOW NOTES** from the **FOOTNOTES** group.






The **FOOTNOTE PANE** is opened, displaying all the footnotes you have inserted. As you move between the different footnotes in the footnote window, the marked text from the document is displayed above.



Finding A Footnote Mark

➤ To move to footnote markers:

 Show Notes

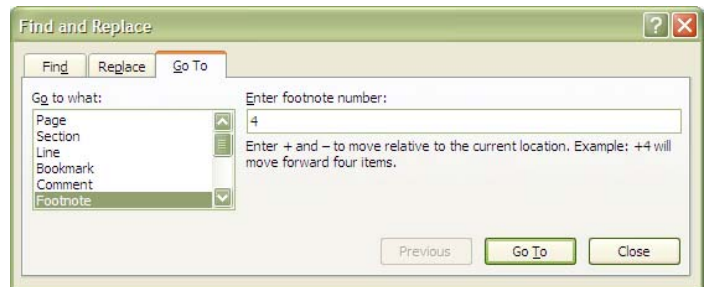
Mouse

- i. Open the footnote pane as described previously and move to the required footnote

Or

Keyboard

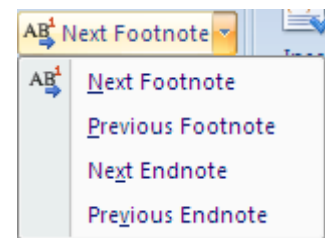
- i. Press the **F5** key (Go To) when you are in the document. When you press **F5**, a dialog is displayed:
- ii. Choose **FOOTNOTE** from the **GO TO WHAT:** list
- iii. To find the next footnote in the document, type +1 in the footnote number and click on the **GO TO** button or the **NEXT** button.
- iv. To find the previous footnote, type in -1 and click on the **GO TO** button or the **PREVIOUS** button.
- v. You can also find a specific footnote by typing in the footnote number and clicking on **GO TO**.
- vi. When you have used one of the above methods, Word takes the insertion point to the relevant footnote mark. You can then Go To another footnote or close the dialog.



Or

Mouse

- i. Click on the drop down arrow next to the next footnote button in the footnote group and make a choice from the selection which direction you wish to go.



Editing And Deleting Footnotes

➤ To edit a footnote:

Mouse

- i. Choose **SHOW NOTES** from the **FOOTNOTES** group, scroll to the footnote and make the required changes.

➤ To delete a footnote:

Keyboard

- i. The only way to delete a footnote is to select the footnote reference mark in the text of the document and then press **DELETE**.

Any remaining footnotes will automatically renumber.



To delete a footnote:



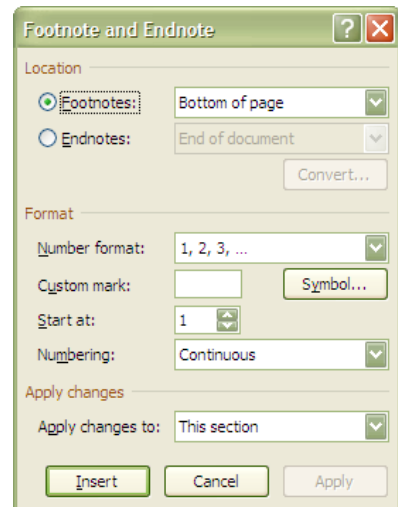
Customising Footnotes

There are various parts of a footnote that you may want to change: the position of the footnote; the style of the numbering; controlling the sequence of footnote numbering. These features can be chosen when you first insert a footnote, or you can edit a footnote mark, which you have already inserted.

➤ To change the style of an individual footnote:

Mouse

- i. Select the relevant footnote mark or position the cursor in the footnote pane, or if it is a new footnote, position the insertion point where you want the footnote mark to appear. Some customising, affects all footnotes, even if you are initially selecting an individual footnote or inserting a new one.
- ii. Choose the **FOOTNOTE** dialog launcher from the **FOOTNOTES** group on the **REFERENCES** ribbon to open the **FOOTNOTE AND ENDNOTE** dialog
- iii. To change the footnote marker, either click in the **CUSTOM MARK** box and type in the symbol, or click on the **SYMBOL** button to select the character you want to use.
- iv. To keep restart numbering in each section or continue throughout document, click on the **NUMBERING** drop down button
- v. Choose the style of numbering from the **NUMBER FORMAT**: drop-down button.



Changing the style of numbering will normally affect ALL footnotes in the document.

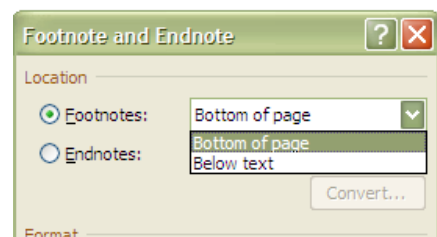
Changing The Position Of All Footnotes

All footnotes can either be placed at the bottom of the page, or beneath the last line of text on that page. By default, Word displays footnotes at the bottom of the page.

➤ To change footnote position:

Mouse

- i. Choose the **FOOTNOTE** dialog launcher from the **FOOTNOTES** group on the **REFERENCES** ribbon to open the **FOOTNOTE AND ENDNOTE** dialog
- ii. Select **BELOW TEXT** from the drop-down
- iii. Click on **INSERT** again to insert a new footnote and modify the current footnotes.





Changing The Number Sequencing

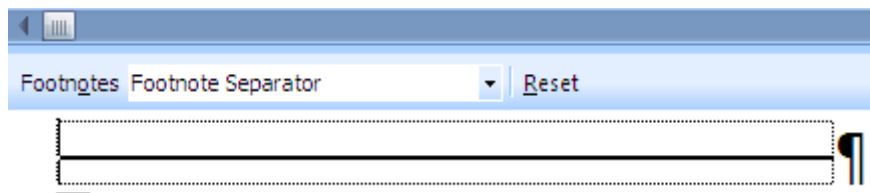
When you insert a footnote, Word automatically applies the next available number. However, you can make the numbering always restart on a new page or in a new section.

➤ To change footnote number sequence:

- i. Choose the **FOOTNOTE** dialog launcher from the **FOOTNOTES** group on the **REFERENCES** ribbon to open the **FOOTNOTE AND ENDNOTE** dialog
- ii. Click on the **NUMBERING** Dropdown
- iii. Choose the restart option you require (continuous is the default)
- iv. Click on **INSERT** to complete.

Customising The Separator Style

Footnotes are separated from the text on the page by a 2-inch horizontal line. You can change the length of the line, its style or simply remove it.



➤ To change footnote separator style:

Mouse

- i. In **DRAFT** or outline View click on the **SHOW NOTES** button from the **FOOTNOTE** group
- ii. In the **FOOTNOTES PREVIEW PANE** (bottom of screen)
- iii. Then select **FOOTNOTE SEPARATOR** from the drop-down list
- iv. Make the required changes to the separator or insert your own using Borders.
- v. Switch views to **PRINT LAYOUT** or click on the **SHOW NOTES** button again.

*If you ever want to return to the default footnote separator, repeat the process above and click on the **RESET** button.*

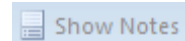
*You can also modify the **FOOTNOTE CONTINUATION SEPARATOR** and its corresponding Notice in the same way. These would only be relevant where footnotes exceed the length of one page.*



Create A Footnote Or Endnote Continuation Notice

If a footnote or endnote is too long to fit on a page, you can create a continuation notice to let readers know that a footnote or endnote is continued on the next page.

➤ To create a continuation notice



Mouse

- i. Make sure that you are in **DRAFT** view
- ii. On the **REFERENCES** ribbon, in the **FOOTNOTES** group, click **SHOW NOTES**.
- iii. If your document contains both footnotes and endnotes, a message appears. Click **VIEW FOOTNOTE AREA** or **VIEW ENDNOTE AREA**, and then click **OK**.
- iv. In the note pane list, click **FOOTNOTE CONTINUATION NOTICE** or **ENDNOTE CONTINUATION NOTICE**. In the note pane, type the text that you want to use for the continuation notice. For example, type **ENDNOTES CONTINUED ON THE NEXT PAGE**.

USING ENDNOTES

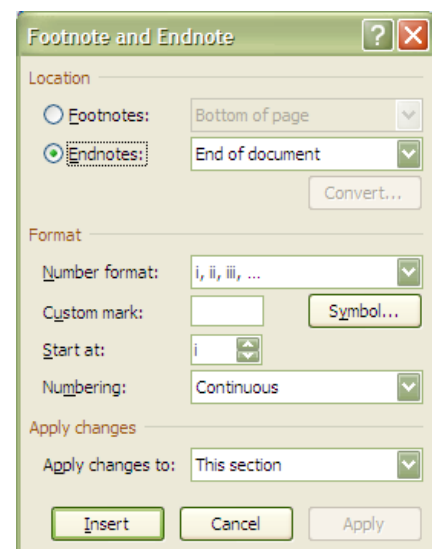
Many of the procedures for an endnote are similar to those outlined for footnotes on the previous pages. Where they differ is that an endnote can either appear at the end of the current section, or at the end of the whole document.

Inserting Endnotes

➤ To insert an endnote:

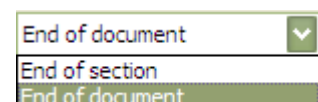
Mouse

- i. Position the insertion point after the word to be referenced, or select the text.
- ii. Choose the **FOOTNOTE** dialog launcher from the **FOOTNOTES** group on the **REFERENCES** ribbon to open the **FOOTNOTE AND ENDNOTE** dialog
- iii. Endnotes are, by default, positioned at the end of the document and are numbered with roman numerals. To change either of these, click on the **OPTIONS** button, and select the required choices from the **PLACE AT:** and **NUMBER FORMAT:** options.
- iv. Click on **INSERT** to insert the endnote



Or Mouse

- i. Position the insertion point after the word to be referenced, or select the text.
- ii. Click on the **INSERT ENDNOTE** button and type endnote text.
- iii. Double click the endnote number to take you back to your correct position in the document.
- iv. You can also specify whether endnotes should have continuous numbering or should restart in each section.





of This would only be relevant if you were displaying the endnotes at the end
each section.



Viewing Endnotes

➤ To view all Endnotes:

Mouse

- i. Switch to **DRAFT** or **OUTLINE** view
- ii. Choose **SHOW NOTES** from the **FOOTNOTES** group
- iii. Select **ALL ENDNOTES** from the drop-down list at the top-left of the **FOOTNOTE PANE**

Finding

Endnotes, like footnotes, can be found using the **F5** key:

➤ To find an endnote:

Keyboard

Press **F5** and follow the procedures explained for footnotes

Editing And Deleting

To edit an endnote, first display All Endnotes in the footnote pane, then make changes to the relevant endnote.

To delete an endnote, select the endnote reference mark in the text of the document and then press **DELETE**.

The Endnote separators can also be modified or deleted. You would need to first view the footnote pane, and then display All Endnotes. The rest of the processes are outlined in the section Customising the Separator Style

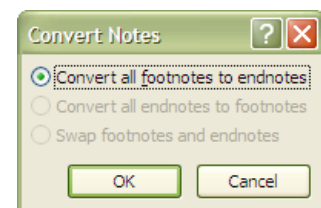
Convert Footnotes To Endnotes

Footnotes can be converted to endnotes and vice versa

➤ To convert an endnote

Mouse

- i. Locate your endnotes or footnotes and have your flashing cursor at that point.
- ii. Choose the **FOOTNOTE** dialog launcher from the **FOOTNOTES** group on the **REFERENCES** ribbon to open the **FOOTNOTE AND ENDNOTE** dialog.
- iii. Click on the **CONVERT** button to launch **CONVERT NOTES** dialog
- iv. Make a selection and click **OK**.





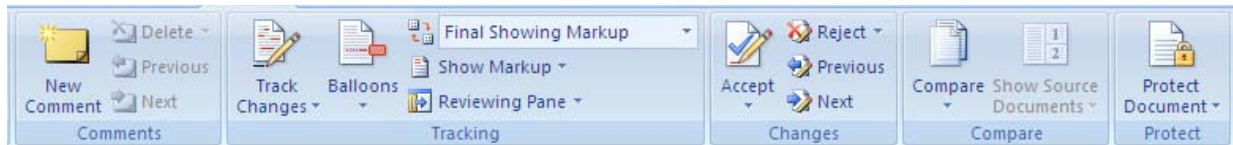
SECTION 10 REVIEWING

By the end of this section you will be able to:

- ✳ Switch on the track changes
- ✳ Review revisions
- ✳ Lock a document to prevent changes
- ✳ Print revisions



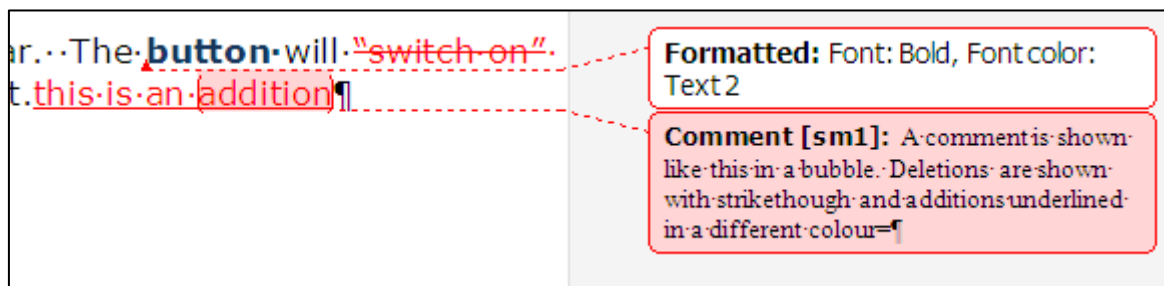
TRACK CHANGES (REVISION MARKS)



The Track Changes facility allows a person who is proofing a document to mark all their suggested additions and deletions on-screen, E.G. additions can be underlined and deletions struck through. The document can then be proofed further and the appropriate corrections ultimately removed or added. This is more efficient than marking revisions on a paper copy which then have to be typed in. It is also more economic as the document need only be printed when the final version is ready.

If more than one person makes revisions to a document, their revision marks will be displayed in a different colour. Also when you come to either accept or reject the revisions, Word displays who made the revision and on what date.

Use the improved Reviewing toolbar for document collaboration. Tracked changes are represented by clear, easy-to-read markup that doesn't obscure the original document or affect its layout. Markup is displayed while tracked changes are turned on, and also as the result of a comparison between two versions of a document.



Balloons show comments and formatting changes in print preview.

Word also has enhanced compare and merge features. In addition to integration with tracked changes, improvements include overall accuracy and robustness, the tracking of more types of changes, and the option to create a third document that contains the comparison.

Distributing a document for review is a complete, integrated process. When you send a document for review, Word automatically creates a review request form; enables and displays the reviewing tools when a reviewer receives the document; and prompts you to merge changes when the reviewed copy is returned. You can then use the reviewing tools to accept or reject the changes

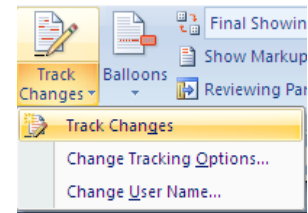


Tracking Changes

➤ To set up a document to track changes made:

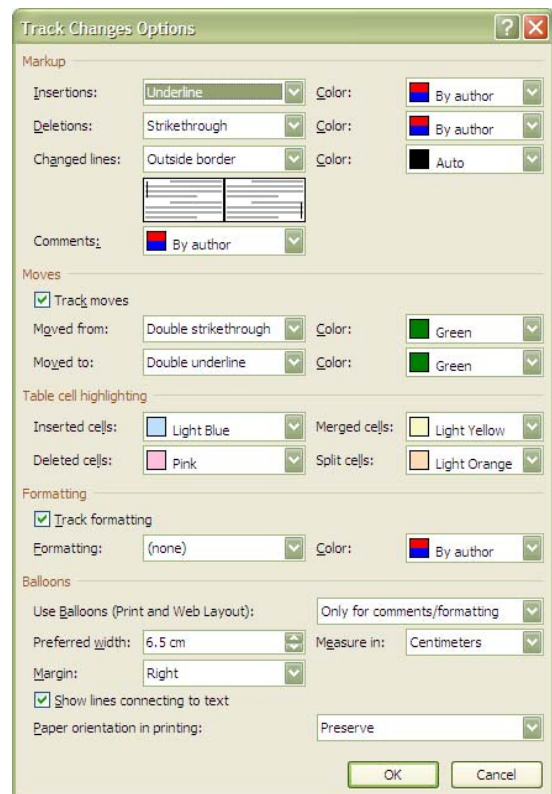
Mouse

- Choose the drop down arrow on the **TRACK CHANGES** button in the **TRACKING** group on the **REVIEW** ribbon and select **TRACK CHANGES** from the menu.
- Inserted Text will by default be underlined. Deleted Text will be struck through. Alternatively it can be shown in a balloon.
- For Inserted and Deleted Text, the colour of both types of revisions will be specific to the Author (the person making the revision). This is up to a maximum of 8 authors.
- Click on **OK** to to start marking revisions.



When you make revisions, a vertical line is displayed to the left of the line containing the revision. Use the **CHANGE TRACKING OPTIONS** from the drop-down menu from the **TRACK CHANGES** button to specify whether you want a vertical line, (**CHANGED LINES** option) and if you do, where to position it (to the left or right of the paragraph, or as an outside border).

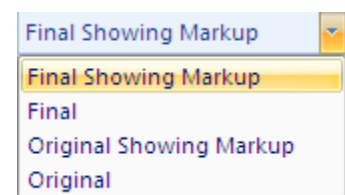
When you open a document that contains revision marks, you can either continue to make more revisions, or review the current revisions - accepting, rejecting or leaving them for later. If someone else has made revisions before you there revision colour will be different from yours these colours can be changed by the **TRACK CHANGES OPTIONS**.



➤ To Hide revision marks:

Mouse

- Choose The drop down box showing **FINAL SHOWING MARKUP** and choose just **FINAL** which will hide all the revisions and show you the document with all changes but unmarked.



Turning Off Track Changes

To continue editing as normal without marking the changes, you need to turn the changes off.

➤ To switch Track Changes off:

Mouse

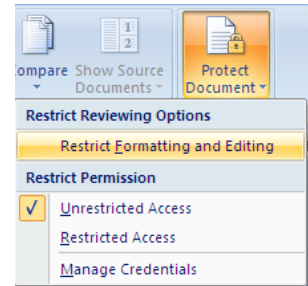


- i. Choose the drop down arrow on the **TRACK CHANGES** button in the **TRACKING** group on the **REVIEW** ribbon and select **TRACK CHANGES** from the menu. This will now turn off the track changes facility.

Locking A Document

If you save a file with the Track Changes switched on, then any other person who opens the file will automatically be marking revisions when they edit the text. Although, they could turn off the Track Changes and edit as normal.

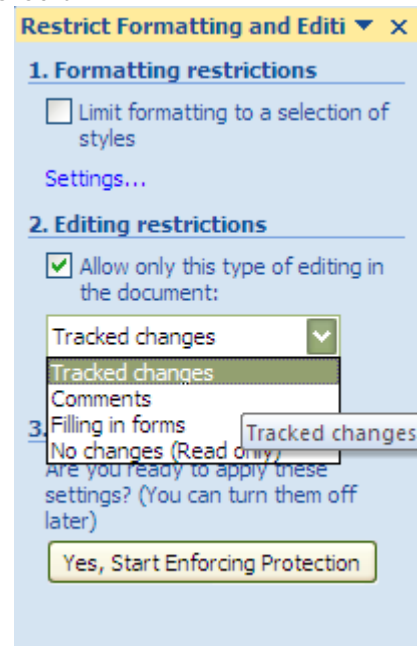
To prevent someone from turning the Track Changes feature off, you would need to lock the document. You can also include a password, so that only users who know the password can then unlock the document and turn off the Track Changes. The original author would still be able to edit the document and accept or reject the revisions.



➤ To lock a document:

Mouse

- i. Choose **PROTECT DOCUMENT** from the **PROTECT** group on the **REVIEW** ribbon. And select **RESTRICT FORMATTING AND EDITING** from the menu.
- ii. In the **EDITING RESTRICTIONS** area of the task pane, select **TRACK CHANGES**
- iii. Click on **YES, START ENFORCING PROTECTION**
- iv. Enter a password in the dialog box that appears if you wish.
- v. Click **OK**



➤ To unlock a protected document:

Mouse

- i. Choose **PROTECT DOCUMENT** from the **PROTECT** group on the **REVIEW** ribbon. And select **RESTRICT FORMATTING AND EDITING** from the menu.
- ii. At the bottom of the task pane click on the **STOP PROTECTION** button
- iii. You will be prompted to enter the password if one was originally added.

Encryption to protect against malicious users needs windows rights management and a Digital signature



REVIEWING THE CHANGES

As you review tracked changes and comments, you can accept or reject each change. Until you accept or reject all tracked changes and comments in a document, even hidden changes will appear to viewers in documents you send or display.

Review A Summary Of Tracked Changes



The Reviewing Pane is a handy tool for ensuring that all tracked changes have been removed from your document and won't show up to others who might view your document. The summary section at the top of the Reviewing Pane displays the exact number of visible tracked changes and comments that remain in your document.

The Reviewing Pane also allows you to read long comments that do not fit within a comment bubble.

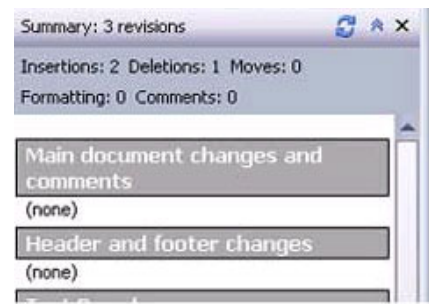
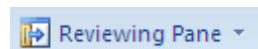
The Reviewing Pane, unlike the document or the comment bubbles, is not the best tool for making changes to your document. Instead of deleting text or comments or making other changes in the Reviewing Pane, make all editorial changes in the document. The changes will then be visible in the Reviewing Pane.

➤ To review changes in the reviewing pane

Mouse

- i. On the **REVIEW** ribbon, in the **TRACKING** group, click **REVIEWING PANE** to view the summary at the side of your screen. To view the summary across the bottom of your screen instead of on the side of your screen, click the arrow next to **REVIEWING PANE**, and then click **REVIEWING PANE VERTICAL**.

*To view the number of each type of change, click on the vertical chevron on the top right of the reviewing pane to **Show Detailed Summary**.*



Review Each Tracked Change And Comment In Sequence

- i. On the **REVIEW** ribbon, in the **CHANGES** group, click **NEXT** or **PREVIOUS**.
- ii. Do one of the following:
 - ✳ In the **CHANGES** group, click **ACCEPT**.
 - ✳ In the **CHANGES** group, click **REJECT**.
 - ✳ In the **COMMENTS** group, click **DELETE**.
- iii. Accept or reject changes and delete comments until there are no more tracked changes or comments in your document.

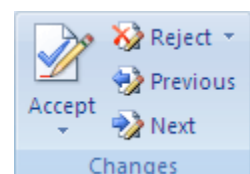


*To ensure all tracked changes are accepted or rejected and that all comments are deleted, on the **REVIEW** ribbon, in the **TRACKING** group, click **REVIEWING PANE**. The summary section at the top of the **REVIEWING PANE** displays the exact number of tracked changes and comments that remain in your document.*

➤ To Accept all changes at once

Mouse

- i. On the **REVIEW** ribbon, in the **CHANGES** group, click **NEXT** or **PREVIOUS**.
- ii. Click the arrow below **ACCEPT**, and then click **ACCEPT ALL CHANGES IN DOCUMENT**.





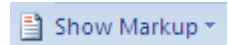
➤ To Reject all changes at once

Mouse

- i. On the **REVIEW** ribbon, in the **CHANGES** group, click **NEXT** or **PREVIOUS**.
- ii. Click the arrow beside **REJECT** , and then click **REJECT ALL CHANGES IN DOCUMENT**.

Review Changes By Type Of Edit Or By A Specific Reviewer

Mouse



- i. On the **REVIEW** ribbon, in the **TRACKING** group, click the arrow next to **SHOW MARKUP**. And Clear all check boxes except for the ones next to the types of changes that you want to review.

Or

- i. On the **REVIEW** ribbon, in the **TRACKING** group, click the arrow next to **SHOW MARKUP**. Point to **REVIEWERS**, and then clear all check boxes except for the ones next to the names of the reviewers whose changes you want to review.

*To select or clear the check boxes for all reviewers in the list, click **ALL REVIEWERS**.*

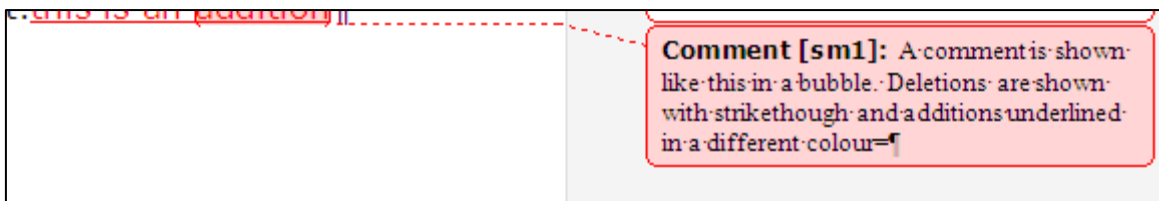
- ii. Accept or reject changes as previously discussed



COMMENTS

Comments are initialled and numbered annotations that are written and appear in a special pane (like footnotes and endnotes) so that they do not affect the document text. The feature is useful if you are reviewing a document and merely want to make suggestions or comments rather than actually make editing changes or revision marks.

An addition to this feature is the ability to "lock" a document against editing changes being made by anyone other than the author, but still allow comments to be added. This means the document cannot be altered.



Inserting A Comment

➤ To add a comment to a document:

Mouse

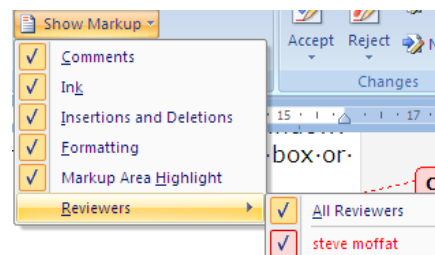
- Position the insertion point next to the text to be commented upon
- Choose **NEW COMMENT** from the **COMMENTS** group on the **REVIEW** ribbon.
- In the Comment bubble to the right, your initials will be displayed and next to these you can type in your text.
- A dotted line will lead to the insertion point of the comment.

➤ To View comments by a specific person

If several people have added comments, you can view those made by one person:

Mouse

- On the **REVIEW** ribbon, in the **TRACKING** group, click the arrow next to **SHOW MARKUP**. Point to **REVIEWERS**, and then clear all check boxes except for the ones next to the names of the reviewers whose comments you want to review.
- On the **REVIEW** ribbon, in the **TRACKING** group, click the arrow next to **SHOW MARKUP**. clear all check boxes except for the comments one you want to review.
- Use the **NEXT** and **PREVIOUS** buttons on the **COMMENTS** group to move through your comments for that person
- When you have finished reading the comments, choose from the final showing markup drop down box and select final all comments will be hidden.



Don't forget that the next time you review the changes you will have to put these settings as they were otherwise you will see no markup or comments except for the last person it was set for.



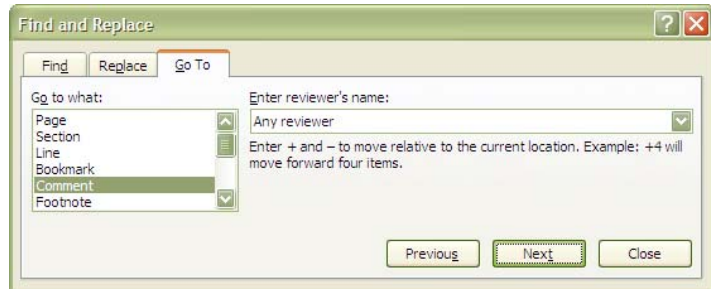
Finding Comments

Comments, like footnote marks, can be found using the GoTo key:

➤ To find comments:

Keyboard

- ii. Ensure **FINAL SHOWING MARKUP** is turned on from the **TRACKING** group
- iii. Press **F5**
- iv. Select **COMMENT** in the **GO TO WHAT:** list
- v. Choose either **ANY REVIEWER** or a specific reviewer from the **ENTER REVIEWER'S NAME:** drop-down list
- vi. Click on **NEXT** to find the next comment, or **PREVIOUS** to search back through the document
- vii. Click on **CLOSE** to return to the document



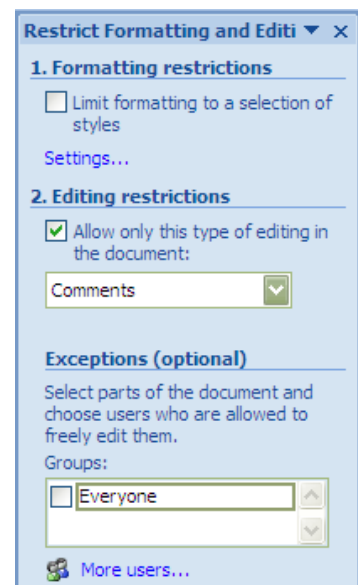
Locking A Document

You can lock a document so that other users can only view and print, and add comments to it. The original author would still be able to edit the document.

➤ To lock a document:

Mouse

- i. Choose **PROTECT DOCUMENT** from the **PROTECT** group on the **REVIEW** ribbon. And select **RESTRICT FORMATTING AND EDITING** from the menu.
- ii. In the **EDITING RESTRICTIONS** area of the task pane, select **COMMENTS**
- iii. If many people have made comments you can select exceptions from the exceptions section to allow those users to freely edit them.
- iv. Click on **YES, START ENFORCING PROTECTION**
- v. Enter a password in the dialog box that appears if you wish. Click **OK**



➤ To unlock a protected document:

Mouse

- i. Choose **PROTECT DOCUMENT** from the **PROTECT** group on the **REVIEW** ribbon. And select **RESTRICT FORMATTING AND EDITING** from the menu.
- ii. At the bottom of the task pane click on the **STOP PROTECTION** button
- iii. You will be prompted to enter the password if one was originally added.





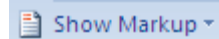
Encryption to protect against malicious users needs windows rights management and a Digital signature

Printing Comments

You can choose to print the comments that have been added to a document without the document text itself.

Before you print the document, switch to Print Layout view and display the tracked changes and comments the way that you want them to appear in the printed document. You have several options.

Print showing all markup



On the **REVIEW** ribbon, in the **TRACKING** group, click **SHOW MARKUP**.

*Clicking **SHOW MARKUP** displays or hides all markup in the document for selected reviewers. When you display all markup, all types of markup are selected on the **SHOW MARKUP** menu.*

Print showing changes and comments by type or reviewer

On the **REVIEW** ribbon, in the **TRACKING** group, click **SHOW MARKUP**, and then select the type of change that you want to display.

Print changes and comments for an editor or other reviewer

On the **REVIEW** ribbon, in the **TRACKING** group, in the **DISPLAY FOR REVIEW** box, click **FINAL SHOWING MARKUP**.

When the markup appears the way that you want it to, you are ready to print the document.

➤ To print showing selected markup



- i. Click the **OFFICE BUTTON**, and then click **PRINT**.
- ii. In the Print dialog box, in the **PRINT WHAT** box, click **DOCUMENT SHOWING MARKUP**, and then click **OK**.

By default, Microsoft Word chooses the zoom level and page orientation to best display the tracked changes in your printed document.

*If balloons are turned on, the document will shrink to fit the balloons on the printed page. To make your printed page readable, you can turn off balloons by clicking **BALLOONS** in the **TRACKING** group and then clicking **SHOW ALL REVISIONS INLINE**. You can also set the page layout to landscape to print the balloons and the text in a more readable format. On the **PAGE LAYOUT** ribbon, under **PAGE SETUP**, click **ORIENTATION**, and then click **LANDSCAPE**.*

Versions

The Versioning feature isn't available in Microsoft Office Word 2007. If you save a document that contains versioning in the Microsoft Office Word 97-2003 file format and then open it in Office Word 2007, you will lose access to the versions.

If you open the document in Office Word 2007 and you save the document in either Word 97-2003 or Office Word 2007 file formats, you will permanently lose all versions.

Use The Version Extraction Tool



You can save versions of a document as multiple files by using the Version Extraction Tool (VET), which is included in the Office Migration Planning Manager (OMPM). The OMPM and the VET are available on the Microsoft TechNet Web site.



SECTION 11 OBJECTS

By the end of this section you will be able to:

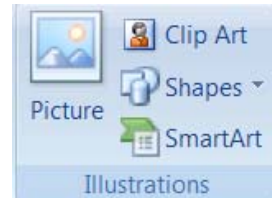
- ✦ Insert pictures and drawing objects from the insert ribbon
- ✦ Use the design and format ribbons to enhance your objects
- ✦ Insert new 2007 objects such as Smartart



INSERTING, FORMATTING AND DELETING OBJECTS

Inserting A Drawing Object

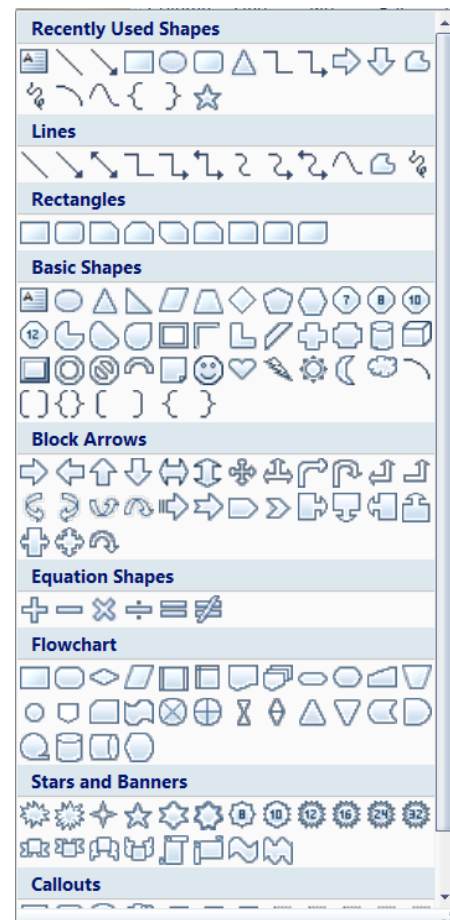
Inserting pictures, text boxes, callouts, scanned images etc into a document can greatly enhance your overall document appearance. The subject of dealing with these objects will be looked at more thoroughly in PowerPoint as that application deals primarily with inserted objects and how to deal with them as word works primarily with text and excel with figures, however here is a brief rundown of some items you may insert and how to deal with them.



➤ To insert a shape onto document.

Mouse

- On the **INSERT** ribbon in the **ILLUSTRATIONS** group, click on the drop down arrow to the right of **SHAPES**.
- Make a selection by clicking with the left mouse button on the desired shape. If you cannot immediately find what you want, scroll down using the scroll bar to the right to locate other shapes.
- The menu will dissappear but your mouse cursor will appear as a small black cross. Click and drag diagonally to place the shape on the document.



➤ To move or resize a shape

Mouse

- Select shape by clicking on it selection will be shown by handles appearing around the shape.
- Moving mouse cursor over shape should give a four pointed arrow clicking and dragging with this cursor will move the shape to desired position.

OR

- Use cursor keys for small adjustments in moving shape around document.
- Moving mouse cursor over a handle will give a black two pointed arrow. Clicking and dragging will resize the shape to appropriate size.

➤ To delete a shape

Mouse

- Select shape by clicking on it selection will be shown by handles appearing around the shape.
- Press **DELETE** on the keyboard to remove shape.



Smartart

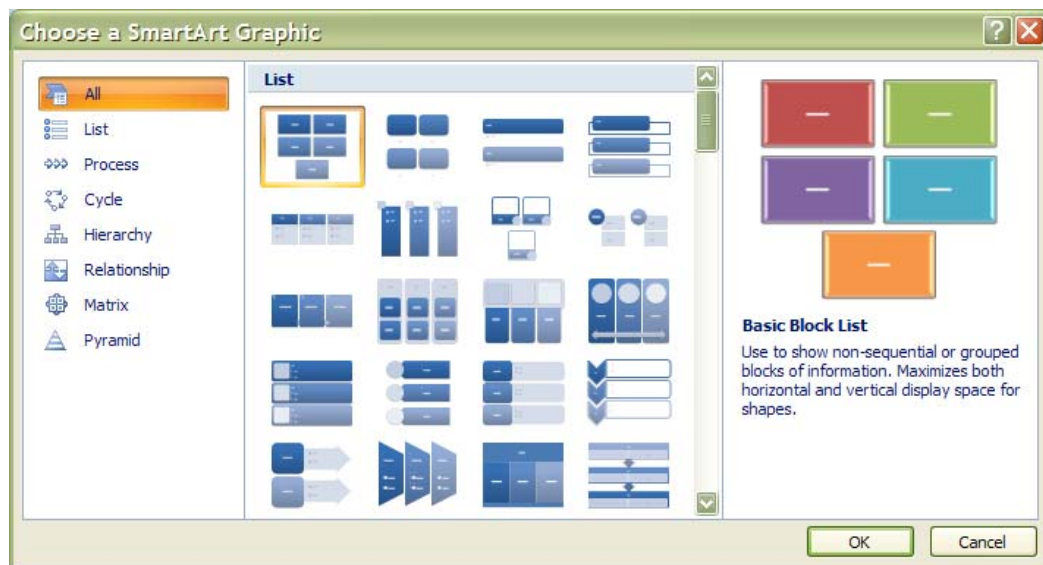
A SmartArt graphic is a visual representation of your information and ideas. You can create SmartArt graphics by choosing from among many different layouts to quickly, easily and effectively communicate your message.

Most people create content that contains only text, even though illustrations and graphics help audiences understand and recall information better than text. Creating designer-quality illustrations can be challenging, especially if you are not a professional designer or you cannot afford to hire a professional designer. If you use earlier versions of Microsoft Office, you can spend a lot of time making shapes the same size and aligning them properly, getting your text to look right, and manually formatting the shapes to match the document's overall style, instead of focusing on your content. With SmartArt graphics and other new features such as themes, you can create designer-quality illustrations with only a few clicks of your mouse.

When you create a SmartArt graphic, you are prompted to choose a type such as **PROCESS, HIERARCHY, CYCLE, or RELATIONSHIP**. A type is similar to a category of SmartArt graphic, and each type contains several different layouts.

When you choose a layout for your SmartArt graphic, ask yourself what you want to convey and whether you want your information to appear a certain way. Because you can quickly and easily switch layouts, try different layouts (across types) until you find the one that best illustrates your message. Experiment with different types and layouts by using the table below as a starting point.

When you switch layouts, most of your text and other content, colours, styles, effects, and text formatting are automatically carried over to the new layout.



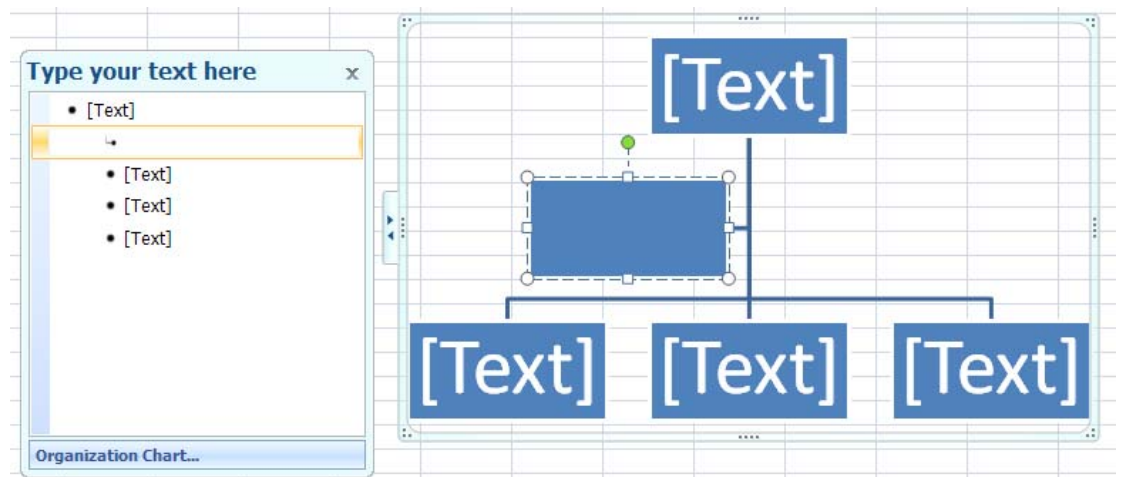
➤ To insert a SmartArt graphic

Mouse

- i. On the **INSERT** ribbon in the **ILLUSTRATIONS** group, click on the drop down arrow to the right of **SMARTART** the **SMARTART** dialog above will appear
- ii. Choose a category from the left then a graphic from the centre to see a preview on the right.
- iii. When you have the selection you desire click ok to insert the smartart on your document.



The smart art will appear on your document as in picture below.



About the Text pane

The Text pane is the pane that you can use to enter and edit the text that appears in your SmartArt graphic. The Text pane appears to the left of your SmartArt graphic. As you add and edit your content in the Text pane, your SmartArt graphic is automatically updated— shapes are added or removed as needed.

When you create a SmartArt graphic, the SmartArt graphic and its Text pane are populated with placeholder text that you can replace with your information. At the top of the Text pane, you can edit the text that will appear in your SmartArt graphic. At the bottom of the Text pane, you can view additional information about the SmartArt graphic.

➤ To enter text into SmartArt

Mouse

- Click on placeholder in the **TEXT PANE**.
- Placeholder text will disappear.
- Type required text and press **ENTER**
- Focus will create a new placeholder and new shape waiting for text
- Press **TAB** to move the text lower in the hierarchy in the example above or **SHIFT + TAB** to move it higher.

➤ To remove a SmartArt shape

Mouse

- Select the text or placeholder text of the shape you wish to remove in the **TEXT PANE**.
- Press **DELETE** key on keyboard
- Both text and shape will be removed from graphic



Wordart

WordArt is a gallery of text styles that you can add to your 2007 Microsoft Office system documents to create decorative effects, such as shadowed or mirrored (reflected) text. You can change WordArt text, as you can change any other text in a shape.

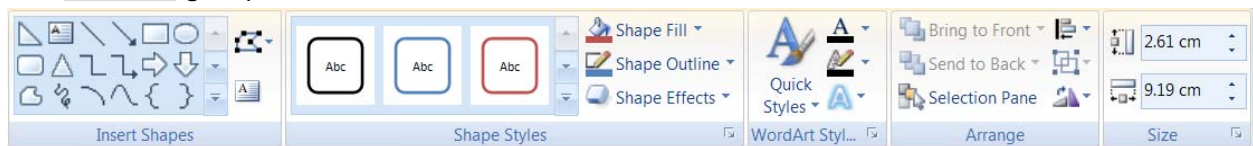
Mouse

- i. On the **INSERT** ribbon, in the **TEXT** group, click **WORDART**, and then click the WordArt style that you want.
- ii. Enter your text.
- iii. A WordArt graphic can be resized, rotated, deleted and moved like any other shape.



Formatting Shapes

Any shape inserted in the document, when selected, causes a new ribbon to appear called the **FORMAT** ribbon seen below, it offers the options of inserting further shapes. Formatting all aspects of the selected shape and fixing a specific size. The easiest method of formatting your shape is to use the QuickStyle option in the **SHAPE STYLES** group



Quickstyles

Quick Styles are combinations of different formatting options and are displayed in a thumbnail in the various Quick Style galleries. When you place your pointer over a Quick Style thumbnail, you can see how the Quick Style affects your SmartArt graphic or shape.

Quick Styles for SmartArt graphics (SmartArt Styles) include edges, shadows, line styles, gradients and three-dimensional (3-D) perspectives. Try different combinations of SmartArt Styles and colours until you find one that matches the message that you want to communicate. You can pick a layout, a SmartArt Style, and a colour variation that you like, and then change the layout again — your SmartArt Style and colours will stay with your SmartArt graphic, so that you do not need to re-do them.

SmartArt Styles map the theme effects (theme effects: A set of visual attributes that is applied to elements in a file. Theme effects, theme colours and theme fonts compose a theme.) of the document theme to the shapes within the SmartArt graphic. E.G. shapes might have thick lines or edges, while arrows might have a more subtle style applied to them. You can also apply colours from the theme colours of the document in different ways, such as changing the colour of the shape border. If you create multiple SmartArt graphics and want them to look alike, you can apply the same colours and SmartArt Style to achieve a consistent, professional look.

You can have shapes that display with edges, depth, and rotate in 3-D space. To make a SmartArt graphic three-dimensional, apply a 3-D SmartArt Style or manually apply a 3-D rotation to each shape. If the entire SmartArt graphic is three-dimensional (called scene coherent 3D), you can continue to edit the text and



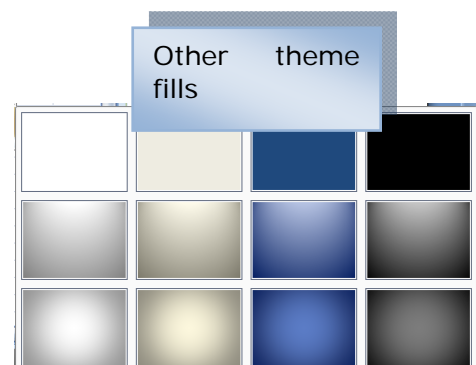
formatting of each of the individual shapes, but the shapes cannot be repositioned or resized. You can only reposition or resize shapes in a two-dimensional scene. To switch between 2-D and 3-D, under **SMARTART TOOLS**, on the **FORMAT** ribbon, in the **SHAPES** group, click **EDIT IN 2-D**. The **EDIT IN 2-D** button temporarily unlocks your SmartArt graphic for editing so that you can move and resize shapes— but the 3-D SmartArt Style is still applied to your SmartArt graphic and reappears when you click **EDIT IN 2-D** again. When your SmartArt graphic is displayed in a 3-D scene, you can rotate it as a whole and position light sources and the "camera" such that the entire SmartArt graphic appears to pop out of the screen.

SmartArt Styles affect an entire SmartArt graphic, while Quick Styles for Shapes (Shape Styles) affect only the selected shape. You can manually customize a shape by changing the colour, effects or border, or by replacing it with another shape. It is recommended that you customize your SmartArt graphic only after you settle on its content and layout, as some customizations are not transferred because they might not look good in the new layout. For more information about switching layouts for SmartArt graphics, see Switch the layout or type of a SmartArt graphic.

➤ To apply a QuickStyle

Mouse

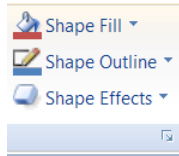
- i. Select the shape or shapes you wish to apply a QuickStyle to.
- ii. As you move your mouse over the various options your shape in the document will temporarily take on that format as a preview. See below.



- iii. If you prefer to look at the other theme fills option at the bottom you will be given the above options
- iv. When you locate the style you want click on it to apply it to your shape.



Manual Formatting



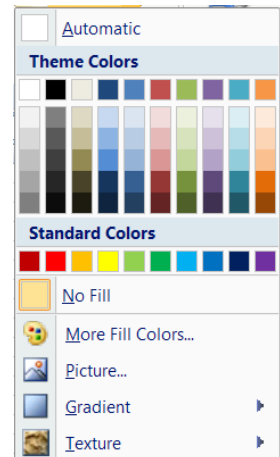
Manual formatting can be applied as well. Fill, border, 3D, rotation etc using various tools from the format ribbon. There are also tools for aligning, layering and sizing your shape as in a desktop publishing programme.

➤ To change fill colour

Mouse

- i. Select shape to be formatted select **FILL COLOUR** from the **SHAPE STYLES** group.
- ii. Select a **THEME COLOUR, STANDARD COLOUR, GRADIENT, TEXTURE, PICTURE** or **MORE FILL COLOURS**.

more fill colours gives a palette with any possible colour you may require. You may match a colour if you know the RGB or CYMK numbers)

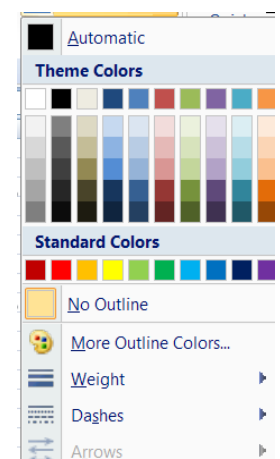


➤ To change a border

Mouse

- i. Select shape to be formatted select **SHAPE OUTLINE** from the shape styles group.
- ii. Select a **THEME COLOUR, STANDARD COLOUR** or **MORE OUTLINE COLOURS**.
- iii. when you have selected a colour for your shapes outline you may wish to make it thicker or to have a dashed style. Repeat step one and select weight or dashes and make a selection to apply to your shape.

The arrows option is available if your shape happens to be any kind of line you may choose an arrow style as well as a weight and line style

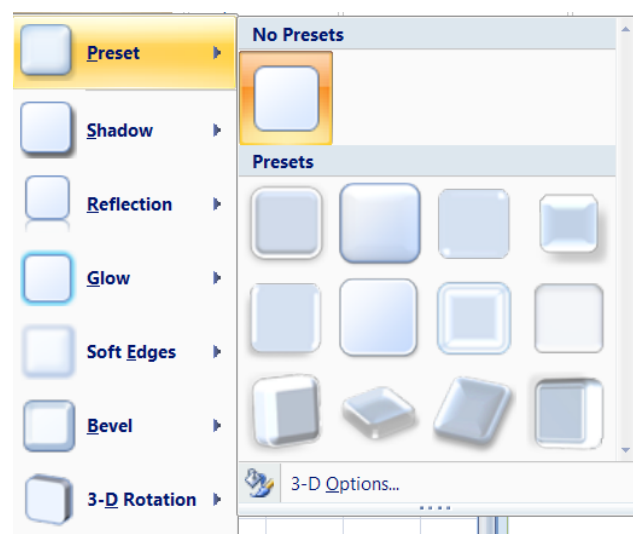


➤ To apply shape effects

Mouse

- i. Select shape to be formatted. Click on **SHAPE EFFECTS** to see menu on right
- ii. The preset menu shows popular styles made up of the other menu choices. Select a preset to apply.
- iii. You may alter aspects of the preset by repeating and selecting a different menu choice.

Using all formatting choices shown gives a very professional finish to any object placed on the document many of these options are available for charts and pictures.







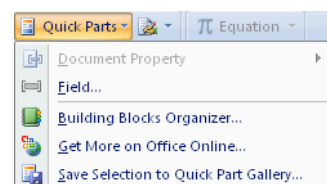
BUILDING BLOCKS

*Building blocks are items within a document that you save using the Quick Parts tool to be reused in other documents. E.G. you might save your company's contact information or mission statement, a design for a report opening, a special list style that you use in your documents regularly, or a staff roster you include on finished publications. **AUTOTEXT** was used previously in earlier versions of word Now in 2007 we have **BUILDING BLOCKS** or **QUICK PARTS** that allow the storage of pictures, tables or anything.*

Creating A Quick Part

- i. Select the content you want to save as a building block.

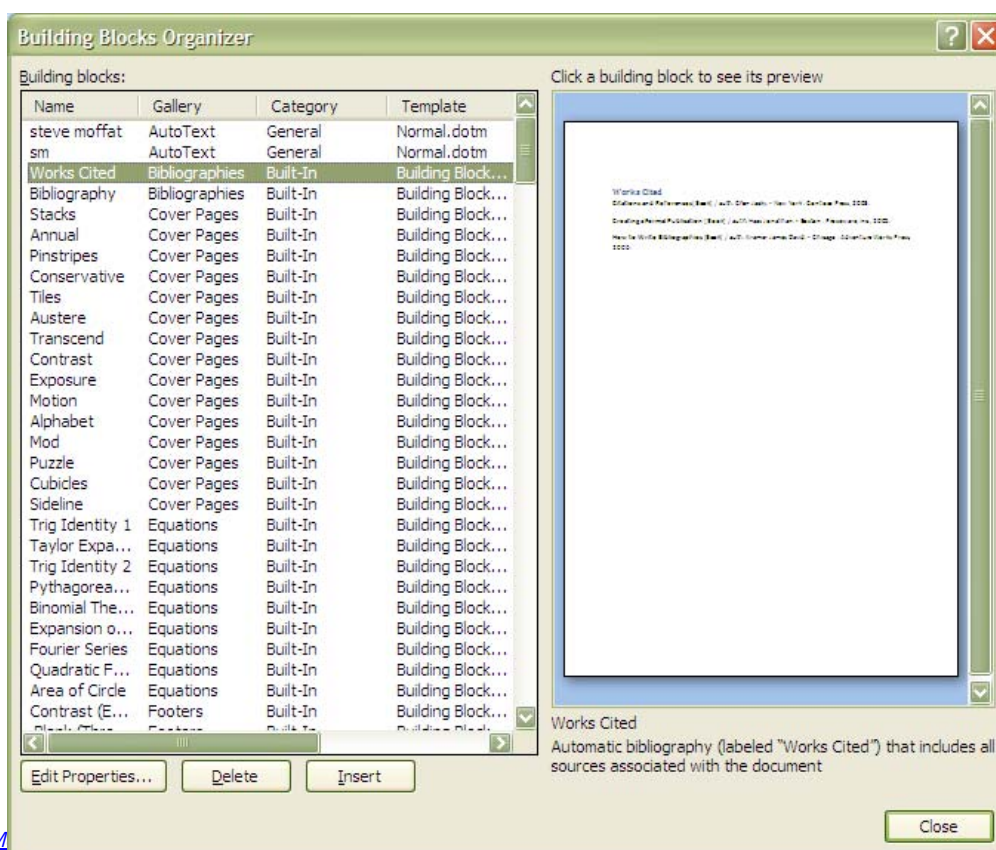
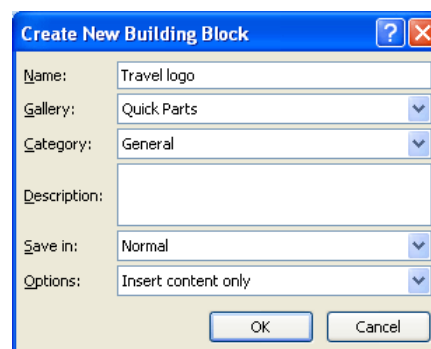
The content you select can include text, images, and special formats. Whatever you save as a building block will be placed in the new document as is, so lines, logos, hyperlinks, and more can be saved for reuse.



- ii. Click the **INSERT** ribbon and in the **TEXT** command group, click the down arrow next to **QUICK PARTS**. A menu appears.

- iii. Click **SAVE SELECTION TO QUICK PART GALLERY**. The **CREATE NEW BUILDING BLOCK** dialog box appears.

- iv. Type a name for the **QUICK PART** and click **OK**. This saves the new item in the **QUICK PARTS** gallery so that you can insert it in a document by selecting it from the **QUICK PARTS** menu or the **BUILDING BLOCKS ORGANISER**.





Adding Quick Parts To A Document

Once you have stored often used text blocks, pictures and tables to your quick parts also stored in the building blocks gallery all you need to do is insert them in the appropriate places.

*If you want to see the whole collection of available building blocks, including the ones you added, click **BUILDING BLOCKS ORGANISER** in the **QUICK PARTS** menu. A large variety of building blocks are provided for everything from cover pages to equations to page numbering. In the **BUILDING BLOCKS ORGANISER**, you can preview, edit, or delete building blocks and, if you choose, insert them in your current document.*

➤ To add a quick part

Mouse

- i. Open the document in which you want to add the Quick Part. Click to insert the cursor at the point in the document where you want to add the item.
- ii. Click the arrow next to **QUICK PARTS**. In addition to the options previously available, now you see a list of building blocks you have added to the list.
- iii. Click the part you want to insert at the cursor position.



SECTION 12 ADVANCED EXTRAS

By the end of this section you will be able to:

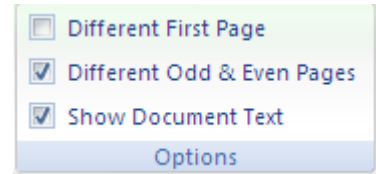
- ✦ Set up odd and even Headers and Footers
- ✦ Set the start number for page numbers in a document
- ✦ Create hyperlinks in a document
- ✦ Understand and use Auto format options
- ✦ AutoComplete text in documents
- ✦ Add buttons and menus to the quicktoolbar to carry out Word commands
- ✦ Understand what a macro is.
- ✦ Record macros to carry out sequences of commands
- ✦ Assign macros to shortcut keys, toolbar buttons and menus



Odd & Even Headers & Footers

Headers and footers appear at the top and bottom of each page within a document. The header that you add will be the same on every page as will the footer. You can suppress the header or footer from the first page of a document (E.G. if you have a title page where you don't want them to appear). If your document is being printed in book format you may want to set up a header for the odd pages and a mirror image header for the even pages and likewise for the footer.

This feature is typically used to set-up headers and footers for a double-sided document, providing you with the ability to have a different header/footer on the left page (even) to that on the right page (odd). It could be used to create a mirror effect, where E.G. the page number is printed at the bottom left of an even page and the bottom right of an odd page.



➤ To create a different odd and even page header/footer:

Mouse

- i. Edit the current header or footer.
- ii. Click on the **DIFFERENT ODD AND EVEN PAGES** check box in the **OPTIONS** group on the **DESIGN** ribbon.

The current header and footer now becomes the Odd Page header/footer. The Even Page header and footer will initially be blank. You can input text, page numbers etc. in the usual way.

For information on how to create different headers and footers in different parts of the same document, see the chapter on Sections earlier in this manual.

Resetting Page Numbers

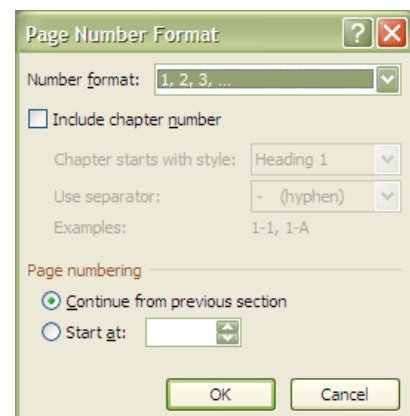
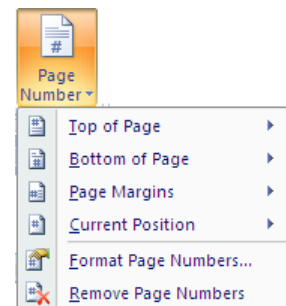
Unless you specify otherwise, page numbers always start counting from 1. If you have a title page in your document, you may want to actually start the page numbering on the second page.

➤ To set the start number for numbered pages:

Mouse

- iii. First of all you will need to remove the page number from the first page by creating a different first page header and footer by clicking on the **DIFFERENT FIRST PAGE** check box in the **OPTIONS** group on the **DESIGN** ribbon..
- iv. Choose **FORMAT PAGE NUMBERS** from the **PAGE NUMBER** button in the **HEADER & FOOTER** group on the **DESIGN** ribbon. In the Start at: field, enter 0 (zero) Click on **OK**, and then choose **CLOSE**

You can then use the Show Next/Show Previous button on the Headers and Footers toolbar to show the new page numbering





The overall effect is that the first page displays no numbering, and the second page displays "Page 1".

Hyperlinks

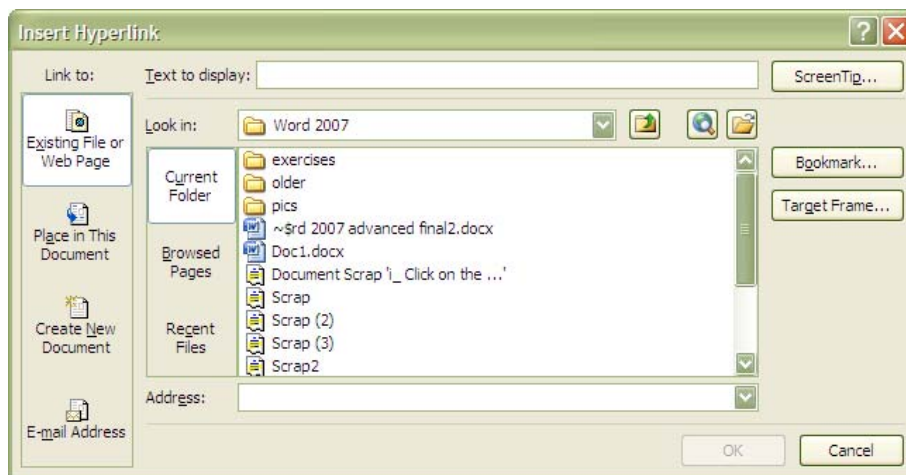
A HyperLink creates a shortcut from one location to another location whether it is in Excel, Word, and PowerPoint or within the same file.

Word '2007 has a **HYPERLINK** button on the **INSERT** ribbon in the **LINKS** group that you can click to create the link.

➤ To create a HyperLink:

Mouse

- Position the mouse in the text where you want to create the HyperLink
- Click on the **HYPERLINK** button on the **INSERT** ribbon in the **LINKS** group
- Here you will be able to attach to another file. You can also use the Hyperlink to take you to a certain location within a document, such as a named range, sheet tab, bookmark or particular slide.



➤ To use the HyperLink:

Mouse

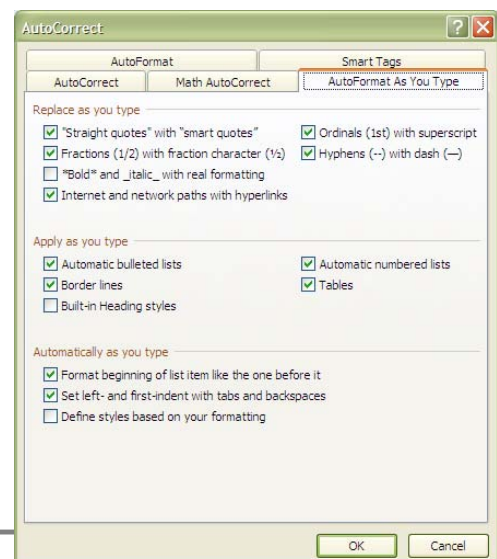
- Position mouse pointer over the HyperLink.
- The mouse pointer will change into a pointing hand.
- Hold down the **CTRL** key and Click the mouse button once and you will be transported to the specified location.



AUTOFORMAT

Word can format text automatically as you type. This helps when creating numbered or bulleted lists, or entering fractions and ordinals and even borders.

Auto list creation





If you begin typing your list using certain characters, Word automatically recognises what you want and formats subsequent paragraphs accordingly.

➤ **To create a numbered list:**

Mouse

- iv. Start a list with a number followed by either:

Character	Example
Full-stop	1.
Hyphen	1-
Closing bracket	1)
Greater than sign	1 >

- v. Type a **TAB** or a **SPACE** and then enter your text.
vi. Press **ENTER**, the next line will be automatically numbered.

➤ **To create a bulleted list:**

Mouse

- vii. Start the list with either of the shown characters, followed by a space:

Character	Example
Asterisk	*
Two hyphens	--
Greater than sign	>
Hyphen and greater than sign	->
Equal and greater than sign	=>

Using Autoformat Settings To Create Borders

By typing three of the following symbols, the following lines appear:

Three Hyphens	---
Three Equal signs	===
Three Tilde signs	~~~
Three Underscores	___
Three Asterisk signs	***
Three Hash signs	###



General Text Auto Formatting

Word's AutoFormat changes the following all automatically as you type options.

Fractions	1/4, 1/2 or 3/4	¼, ½ and ¾
Ordinal numbers	1st, 2nd, 3rd	1st , 2nd and 3rd
One hyphen immediately preceded and followed by text	Chapter 1 - Formatting	Chapter 1 – Formatting

You are able to have words formatted in bold and italics as you type:

By typing *New Zealand*, you will get **New Zealand**

By typing _New Zealand_, you will get *New Zealand*

Autocomplete

Word can automatically offer suggestions for the rest of the word or phrase you are typing. To accept the suggestion, you press **ENTER** and word will automatically replace your partially typed word with the complete word.

Examples of AutoComplete:

Current Date

Day of the Week

Month Names

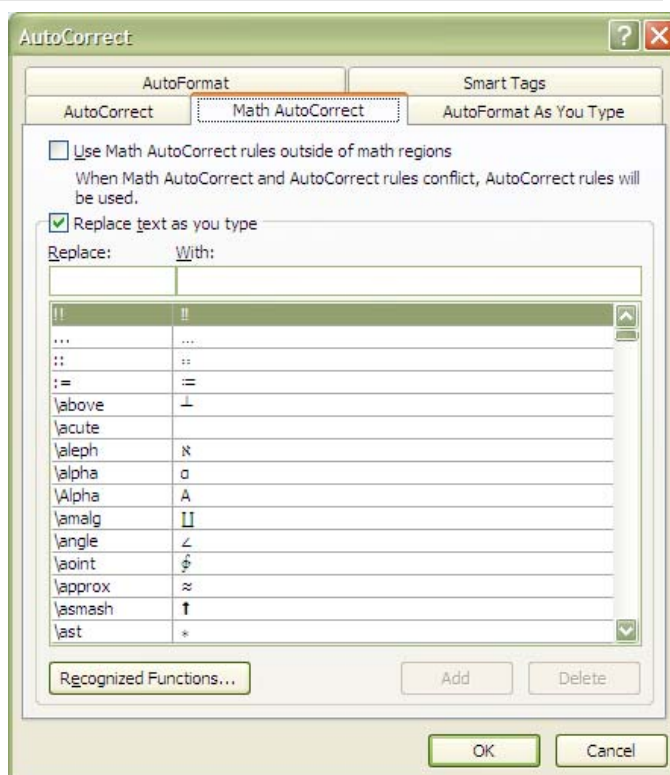
Your name and company name (as long as you have entered it into the User Information under **WORD OPTIONS**, **POPULAR** from the **OFFICE BUTTON**)

AutoText entries

Autocorrect

There are now two autocorrect facilities in word the original **AUTOCORRECT** and the new **MATH AUTOCORRECT**

The whole idea of these autocorrect features is to allow you to quickly enter a special character with a few well remembered keystrokes or correct a mistyped word automatically. Typing for instance "**\approx**" and pressing the space bar will change the typed text and enter the mathematical symbol \approx . To ensure that these work in normal textual typing however, we must ensure that the Math autocorrect is turned on in the normal use of text by checking the tick box near the top of the autocorrect sheet.



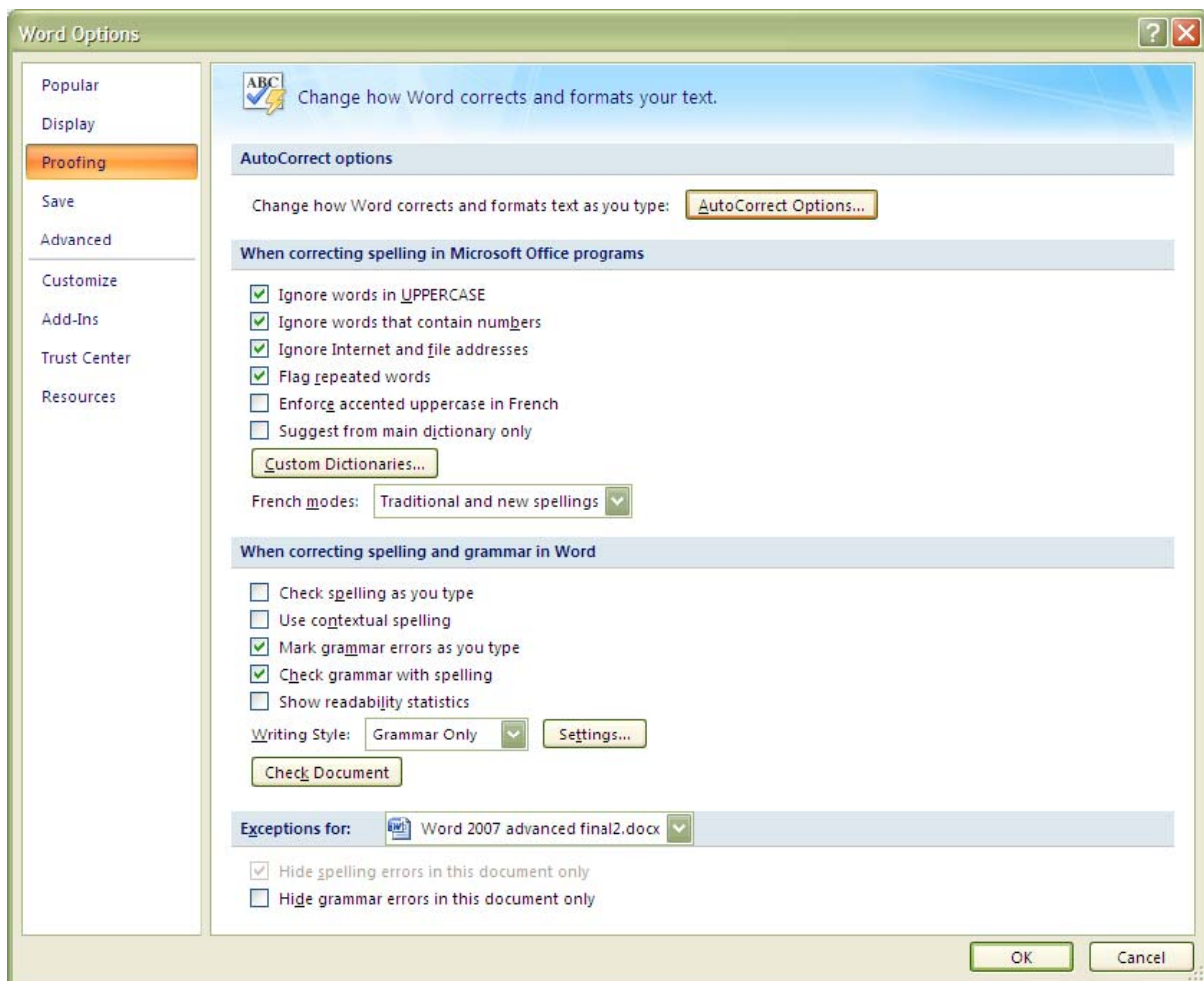




➤ To set autocorrect and autoformat settings

Mouse

- i. Click on the **OFFICE BUTTON** and select **WORD OPTIONS** a dialog will appear.
- ii. Click on the **PROOFING** tab on the left and select the **AUTOCORRECT OPTIONS** button in the top of the right hand pane
- iii. The dialog box on the previous pages appears
- iv. Select the appropriate tab and change the settings you wish to change.





MACROS

Macros are sequences of commands that you can store under a given name and then playback in a variety of different ways. It is useful to set up macros when you find yourself manually issuing the same set of commands over and over again.

Word allows you to record the commands that a particular macro should play back which makes it very easy to set them up. Unless you specify otherwise, your macros are available at a global level – that is you will be able to use macros that you have set up in all the documents that you have created or go on to create.

Recorded Macros

There are a few things that you need to know about what gets recorded as part of a macro. When you're recording a macro, you can use the mouse to click commands and options, but the macro recorder doesn't record mouse movements in a document window. E.G. you can't use the mouse to move the insertion point or to select, copy, or move items by clicking or dragging. You must use the keyboard to record these actions. When you're recording a macro, you can temporarily pause recording and then resume recording where you stopped.

Initially the macro features are hidden we must be able to see the developer ribbon to allow us to work with macro's

➤ To show developer ribbon

Mouse

- i. Click on the **OFFICE BUTTON** and select **WORD OPTIONS** a dialog will appear.
- ii. Go to the **POPULAR** button on the left and on the right select **SHOW THE DEVELOPER TAB IN THE RIBBON**.
- iii. The **DEVELOPER** ribbon will appear.

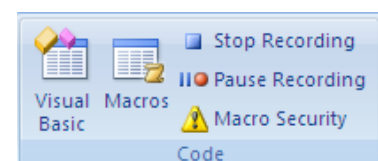
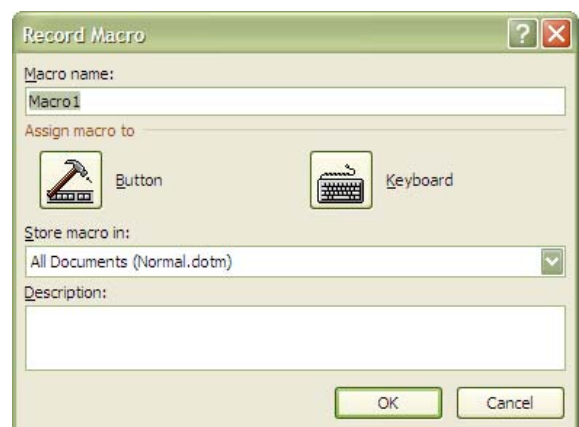
➤ To record a macro:

Mouse

- i. Open the file you wish to store the macro in preferably a template.
- ii. Go to the developer ribbon and click on the record macro button in the code group. The following dialog box will appear:
- iii. In the **STORE MACRO IN** drop-down list, choose the name of the template where you want to save the macro. By default if no specific template is open it will be stored in the normal template.
- iv. In the **MACRO NAME** edit box, type in an appropriate name for the macro.
- v. Click **OK**.

Macro names can be up to 80 characters long and cannot include punctuation characters.

- vi. Carry out the sequence of commands that you want stored within your macro.



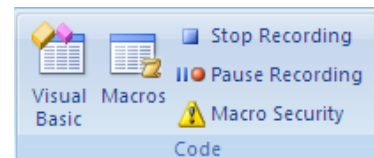


- vii. Click the Stop Record button in the code group when you have finished recording.
- viii. Save the template.

*Don't worry if you make a mistake while recording your macro. Any cancel or Undo commands that you issue won't be saved as part of the finished macro. If you really mess up, simply record the macro again under exactly the same name – Word will ask you if you want to replace the existing copy with the new one, click **YES** to overwrite.*

Playback A Macro

Once a macro has been created, any time you want to carry out the sequence of commands the macro has stored, you can play it back.



➤ To play a macro:

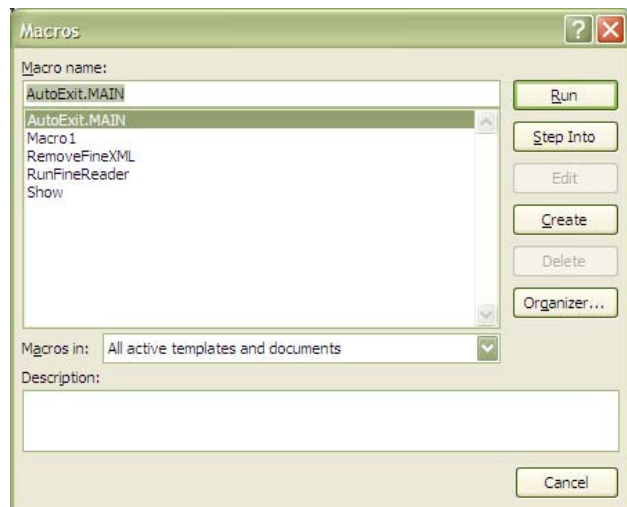
Mouse

- i. Click the **MACROS** button in the **CODE** group.

Or

Keyboard

- ii. Press **ALT F8**. The following dialog will appear: -
- iii. Double-click on the name of the macro you want to play.
- iv. Or select the macro you want and click on the run button





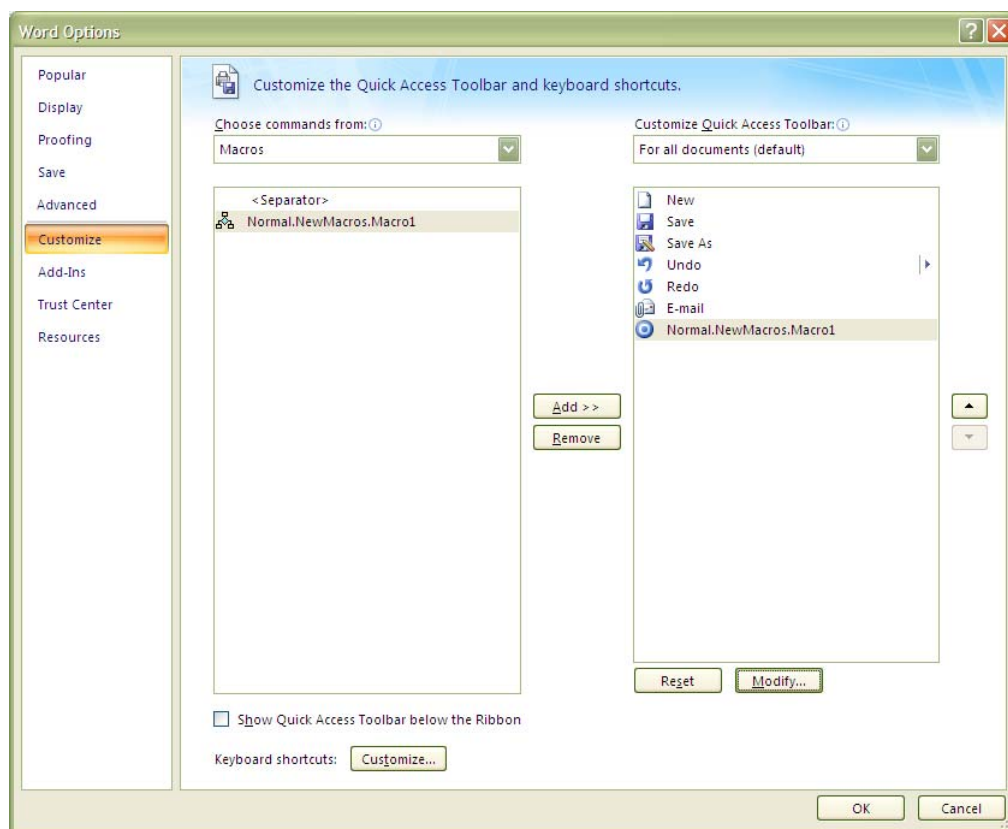
Assigning a Macro To the Quick Toolbar or a Shortcut Key

Just as you can click buttons and press shortcut key combinations to run Word's standard commands, you can set up your macros to run from buttons and keystrokes.

➤ To assign a macro to a toolbar button:

Mouse

- i. Move your mouse over the **QUICK TOOLBAR** and click on the drop down arrow to the right of it
- ii. Select **MORE COMMANDS** a dialog will open



- iii. Click the **CHOOSE COMMANDS FROM** drop down arrow and from the menu select **MACROS**
- iv. In the pane beneath all macro's created will appear.
- v. Select the macro and click on the **ADD** button in the centre of the dialog to add it to the **QUICK MENU** on the right.
- vi. The button will appear in the right hand pane with a standard macro symbol and the name of the macro, preceded by the Template name that the macro belongs to (Normal for global macros).
- vii. To assign a different name And an image to the button, Select the macro on the right and click on the **MODIFY** button below the pane a dialog will appear click in the



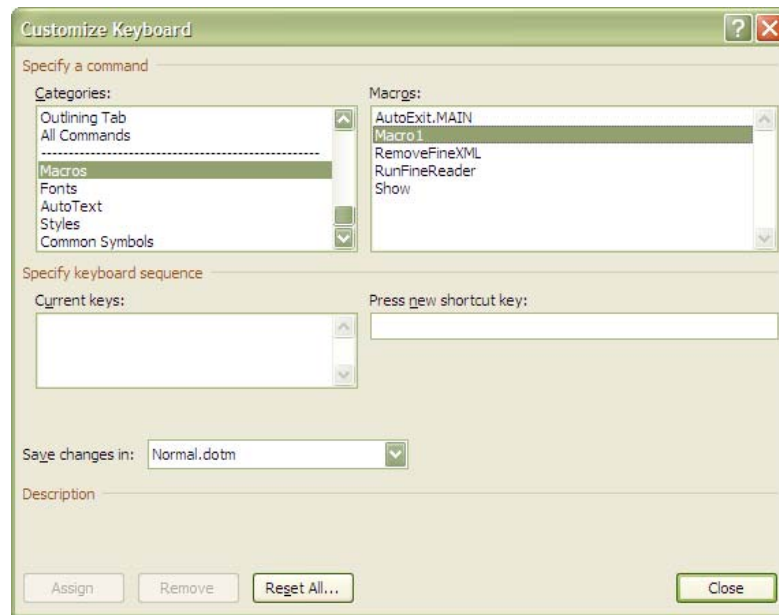


DISPLAY NAME text box and delete the current name, replacing it with the text to appear on the button face (e.g. Insert Custom Table). select an image from the icons in the box above the text box and click on **OK**

viii. Click the **CLOSE** button to close the Customise dialog box.

➤ To add macro to a shortcut key

- iv. Move your mouse over the **QUICK TOOLBAR** and click on the drop down arrow to the right of it
- v. Select **MORE COMMANDS** a dialog will open
- vi. Click on the **CUSTOMISE** button below the left hand pane for **KEYBOARD SHORTCUTS** a dialog will open.



- vii. In the **CATEGORIES** section scroll down and locate macros.
- viii. When it is selected a list of macro's will appear in the right hand pane.
- ix. Select the macro you wish to assign a shortcut for and enter shortcut cut key strokes into the **PRESS NEW SHORTCUT KEY** text box.
- x. If it is shown as unassigned then click on the **ASSIGN** button in the bottom left corner to assign those key strokes to that macro

*Use combination keys such as **CTRL** or **ALT** and another character to avoid accidental running of the macro*

- xi. Repeat previous steps for all macro's you wish shortcut keys for.
- xii. Click on **CLOSE**.



Prepared by stephen Moffat on 28 October 2007