ICDL MODULE 3: ES WSQ - PERFORM ADVANCED WORD PROCESSING FUNCTIONS

MICROSOFT WORD 2013 FAST TRACK

* Consistent Quality * Convenience * Customer Intimacy * Competitive Pricing

COMAT Training Services Pte Ltd
Training Centre:
10 Anson Road
#05-19/20 International Plaza
Singapore 079903

Tel: +65 6323 7911
Fax: +65 6323 7955

Website: www.comat.com.sg
Reg. No: 199902792C

COMAT

"Empowerment Through Education and Training"

ICDL MODULE 3: ES WSQ

PERFORM ADVANCED WORD PROCESSING FUNCTIONS (MICROSOFT WORD 2013 FAST TRACK)

COMAT

ABOUT COMAT TRAINING SERVICES PTE LTD

COMAT is a pioneer in the training industry, establishing our presence since 1984. From a traditional brick and mortar training business, **COMAT** has evolved itself over the last 20 years into an end-to-end learning solution company. Through our years of relentless hard work and effort, we have proven to our clients and valued partners that we always deliver the best quality training and service. And should we fall short, at times (and we expect to realistically), we strive to learn and do better the next time.

COMAT's Learning Solution encompasses personal and organizational productivity to certification courses and end-to-end learning solutions. Being the preferred partners to major principals like Microsoft, IBM, Macromedia and etc, we are enabled to provide trainings on their suite of products and services.

Our continued commitments to making our training innovative had seen us help many reputable organizations and individuals achieve their full potential in their workplace, which cement our position as their preferred learning partner of choice.

DISCLAIMERS

LIMIT OF LIABILITY/DISCLAIMER OF WARRANTY: Author and publisher have used their best efforts in preparing this book. **COMAT Training Services Pte Ltd** makes no representations or warranties with respect to the accuracy or completeness of the contents of this book and specifically disclaims any implied warranties of merchantability or fitness for a particular purpose. There are no warranties that extend beyond the descriptions contained within this paragraph. No warranty may be created or extended by any sales representative or sales materials. The accuracy and completeness of the information contained herein and the opinions stated herein are not guaranteed or warranted to produce any particular results and the advice and strategies contained herein may not be suitable for every individual.

COMAT Training Services Pte Ltd. shall not be liable for any loss of profit or any other commercial damages, including but not limited to special, incidental, consequential, or other damages.

Published By:
COMAT Training Services Pte Ltd
10 Anson Road, #06-19/20, International Plaza,
Singapore 079903
http://www.comat.com.sg

Version Control

No.	Date Release	Author	Technical Reviewer	Project Leader	Remarks
1.0	20 Feb 2013	Banashree Das	Gladys Yeo	LinaLeow	

MICROSOFT WORD 2013 FAST TRACK

LESSON 1 - REVISING WORD DOCUMENT FORMATTING 1
- Applying Multi-Level Outline Numbering ... 2
- Modify Multi-Level Outline Numbering 2
- Creating a Character Style 3
- Modify and Update a Character Style 4
- Creating a Paragraph Style 5
- Modify and Update a Paragraph Style 6
- Apply Multiple Column Layout 7
- Changing Column Width and Spacing 7
- Inserting/Removing Lines Between Columns 8
- Inserting Fields 9
- Updating Fields 10
- Creating Watermarks 10

LESSON 2 - USING SECTION BREAKS .. 13
- Working with Section Breaks 14
- Creating Section Breaks 14
- Changing Page Orientation 15
- Changing Margins for a Section 16
- Apply Different Headers and Footers 16
- Apply First Page Header 17
- Insert Automatic Page Numbering 18
- Practice - Using Section Breaks 19

LESSON 3 - USING TABLE FEATURES .. 20
- Apply Autoformat/Style 21
- Changing Cell Margins 22
- Changing Text Direction 23
- Changing Text Alignment 24
- Repeating Header Rows at Top of Each Page 25
- Stop Table Row to Break Across Pages . 25
- Adding Formula in Table 27
- Formatting Number Field 29
- Converting a Table into Text 30
- Converting Delimited Text to a Table 31
- Exercise - Using Table Features 33

LESSON 4 - WORKING WITH COMMENTS AND REVISIONS 34
- Enabling Change Tracking 35
- Setting Change Tracking Options 36
- Disabling Change Tracking 37
- Comparing Documents 37
- Viewing Tracked Changes 39
- Accepting/Rejecting All Changes 40
- Inserting Comment 42
- Managing Comments 42
- Viewing and Navigating Comments 43
- Exercise - Working with Revisions and Comments 44

LESSON 5 - USING FORMS & PROTECTION 45
- Creating a Form 46
- Setting Properties for Controls 47
- Protecting a Form 49
- Saving a Form as a Template 50
- Exercise - Using Forms 52

LESSON 6 - CREATING MASTER DOCUMENTS 53
- Using a Master Document 54
- Inserting Subdocuments 55
- Collapsing/Expanding Subdocuments 56
- Unlinking Subdocuments 57
- Splitting and Merging Subdocuments 57
- Locking Subdocuments 58
- Opening Subdocuments 59
- Exercise - Creating Master Documents ... 60

LESSON 7 - CREATING A TABLE OF CONTENTS 61
- Using a Table of Contents 62
- Creating a Table of Contents 62
- Using Custom Styles 63
- Updating a Table of Contents 64
- Using Outline Levels 64
- Exercise - Creating a Table of Contents .. 67

LESSON 8 - CREATING AN INDEX 68
- Using an Index 69
- Creating Main Index Entries 69
- Creating Index Subentries 70
- Typing Index Entries 71
- Cross-referencing Index Entries 72
- Generating an Index 73
- Updating an Index 74
- Exercise - Creating An Index 75

LESSON 9 - USING BOOKMARKS, CAPTIONS AND FOOTNOTES 76
- Working with Bookmarks 77
- Creating Bookmarks 77
- Viewing Bookmarks 78
- Going to a Bookmark 79
- Cross-referencing to a Bookmark 79
- Deleting a Bookmark 80
- Inserting a Caption 81
- Inserting a Table of Figures 82
- Inserting a Cross-reference 84
- Inserting Footnotes 85
- Setting Note Options 87
- Viewing Notes 87
- Exercise - Using Bookmarks, Captions And Footnotes 89

LESSON 10 - USING MAIL MERGE 90
- Working with Mail Merge 91
- Starting Mail Merge 91
- Identifying the Main Document 92
- Creating a Recipient List 92
- Customizing Columns in a Recipient List 93
- Rearranging Columns in a Recipient List 94
- Saving a Recipient List 94
- Entering Records into a Recipient List 95
- Sorting Records to be Merged 97
- Highlighting Merge Fields 98
- Inserting Merge Fields into a Document .. 99
- Previewing Merged Data 100
- Merging to a New Document 101
- Merging to the Printer 102
- Exercise - Using Mail Merge 103

LESSON 11 - LINKING/EMBEDDING OBJECTS 105
- Inserting a Hyperlink 106
- Display a Linked Object as an Icon 107
- Embed Data as an Object 108
- Updating a Link 109
- Breaking a Link 110

LESSON 12 - USING MACROS 111
- Recording a Macro 112
- Running a Macro 114
- Adding a Macro Button to the Quick Access Toolbar 115
- Saving a Macro Enabled Document 116
- Deleting a Macro 117
- Exercise - Using Macros 118

Lesson 1 -
Revising Word Document Formatting

In this section, you will learn how to:

- Applying Multi-Level Outline Numbering
- Modify Multi-Level Outline Numbering
- Creating a Character Style
- Modify and Update a Character Style
- Creating a Paragraph Style
- Modify and Update a Paragraph Style
- Apply Multiple Column Layout
- Changing Column Width and Spacing
- Inserting/Removing Lines Between Columns
- Inserting Fields
- Updating Fields
- Creating Watermarks

Applying Multi-Level Outline Numbering

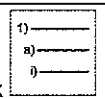
Concepts

Word's multilevel list feature takes bullets and numbering to the next step. It makes creating sublists or subpoints in a list easy. An example of a multilevel list is quiz or test questions where the question uses a number and the possible answers use lower case letters.

Steps

Open **PRDLIST.DOCX**.
Add bullets or numbers to a multilevel list.

Scroll as necessary to view all the text under the **Product Features** heading.

1. Select the list items to which you want to add bullets or numbers. *The text is highlighted as you drag.*	Select the entire list from **Handphone** to **Printer**
2. Release the mouse button. *The text is selected.*	Release the mouse button
3. Select the **Home** tab, if necessary. *The **Home** tab is displayed.*	Click **Home**, if necessary
4. Select the **Multilevel List** button in the **Paragraph** group. *The **Multilevel List** gallery opens.*	Click 
5. Select the desired multilevel list style from the **List Library** section in the **Multilevel List** gallery. *The **Multilevel List** gallery closes and the selected style is applied to the selected text.*	Click 

Click anywhere in the document to deselect the list.

Modify Multi-Level Outline Numbering

Steps

Modify a multilevel list.

Scroll as necessary to view all the text under the **Product Features** heading.

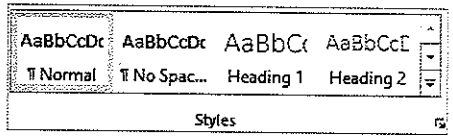
1. Select the list items to which you want to edit. *The text is highlighted as you drag.*	Select the entire list from **Handphone** to **Printer**
2. Release the mouse button. *The text is selected.*	Release the mouse button
3. Select the **Home** tab, if necessary. *The **Home** tab is displayed.*	Click **Home**, if necessary
4. Select the **Multilevel List** button in the **Paragraph** group. *The **Multilevel List** gallery opens.*	Click 
5. Select the desired option from the gallery. *The **Define new Multilevel List** dialog box opens.*	Click **Define New Multilevel List**
6. Select the **drop down arrow** under **Number style for this level.** *The list of number styles is displayed.*	Click Number style for this level: 1, 2, 3, ... 
7. Select a number style from the list. *The desired number style is selected.*	Click **I,II,III,...**
8. Enter the desired text indention in the **Text indent at** box. *The desired text indention is entered in the box.*	Enter **0.5"** in the **Text indent at** box.
9. Select the **OK** button. *The dialog box closes and the number formatting is applied.*	Click **OK**.

Click anywhere in the document to deselect the list.
Close **PRDLIST.DOCX**.

Creating a Character Style

Concepts

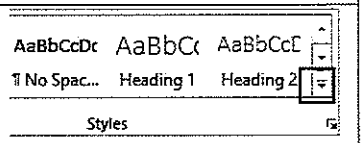
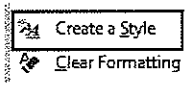
Styles allow you to keep the formatting in your document consistent. A style is a collection of formatting commands under a given name so it can be easily accessed.



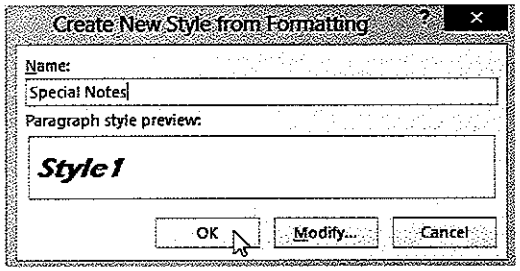
Steps

Open **PRDLIST.DOCX**.

To create a new style, you can format the relevant text and then creating the style based on that formatting.

1. Select the **Home** tab. *The **Home** tab is displayed.*	Click **Home**
2. Highlight the text that you want to apply a new style to. *The text is highlighted as you drag.*	Highlight the text **Product – order by sales**
3. Format the text as desired. *The text is formatted as intended for the new style*	Apply Bold and *Italic*
4. Click on the **Styles** option. *The **Styles** submenu appears.*	
5. Click **Create a Style.**	
6. The **Create New Style from Formatting** dialog appears.	Type ***Special Notes***
10. Select **OK.** *The new style is created.*	Click **OK**

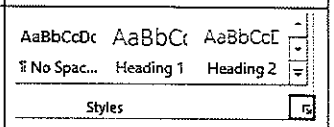
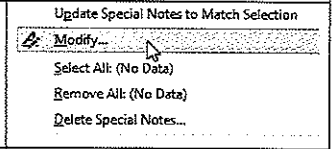
The new style has been created, and now appears as an option in the gallery.



Modify and Update a Character Style

Steps

Edit an existing style.

1. Select the **Home** tab. *The **Home** tab is displayed.*	Click **Home**
2. Click to launch the style task pane	
3. Right mouse click on the style name.	Right mouse click on ***Special Notes***
4. Click **Modify.**	
5. The modify style dialog appear. *Proceed to alter specific styles: font, paragraph, tabs, and etc.*	Apply font **Blue**
6. Click OK.	Click **OK**

The existing style has been updated. Note that all instances of text with this style in the document have been updated.

Creating a Paragraph Style

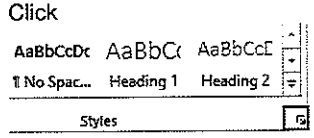
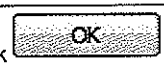
Concepts

A paragraph style includes everything that a character style contains, but it also controls all aspects of a paragraph's appearance, such as text alignment, tab stops, line spacing, and borders.

Steps

Open **Product.docx**. Create a paragraph style.

1. Select the **Home** tab. *The **Home** tab is displayed.*	Click **Home**
2. Highlight the text that you want to apply a new style to. *The text is highlighted as you drag.*	Drag to select the **Delivery**

3. Select the Styles dialog box launcher in the Styles group. *The Styles pane is displayed.*	Click 
4. Select the New Styles button on the Styles pane. *The Create New Style from Formatting dialog box is displayed.*	Click 
5. Enter a name for the style in the Name box. *The desired style name is entered in the Name box.*	Type **StyleB** in the **Name** box.
6. Select the type of style you want to apply from the **Style type** drop down list. *The type of style is selected.*	Select **Paragraph** from the **Style type** list.
7. Proceed to define the formats for the paragraph.	Click **Increase paragraph spacing**
8. Select the **OK** button. *The dialog box closes and the paragraph style is applied to the selected text..*	Click 

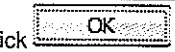
Modify and Update a Paragraph Style

Steps

Modify and update a paragraph style.

If necessary, display the Style pane.

1. Select the text that uses the style you want to modify. *The formatted text is selected.*	Drag to select **Payment**
2. Select the **Manage Styles** button in the **Styles** pane. *The Manage Styles dialog box is displayed.*	Click 
3. Select the **Modify** button. *The Modify Style dialog box is displayed.*	Click **Modify**
4. Select the **Underline** button. *The underline button is activated.*	Click 
5. Select the **OK** button to close the **Modify Styles** dialog box. *The Modify Styles dialog box closes*	Click **OK**

6. Select the **OK** button to close the **Manage Styles** dialog box. *The Manage Styles dialog box closes and the selected Style is updated with the changes.*	Click 

Apply Multiple Column Layout

Concepts

Sometimes you need to give a Word document a multi-column format like a newspaper. Make use of Word 2013 columns feature to achieve that effect.

Steps

Open **COLUMNS.DOCX**.

1. Select the **Page Layout** tab. *The **Page Layout** tab is displayed.*	Click **Page Layout**
2. Select the **Columns** button in the **Page Setup** group. *The **Columns** menu opens.*	 Click
3. Select the desired number of columns. *The document text appears in the selected number of columns.*	Click **Two**

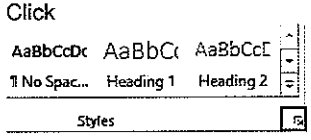
Scroll to view page 2. Then, return to the top of the document. Notice that the header is not affected by the column format.

Changing Column Width and Spacing

Steps

Change column width and spacing.

1. Select the **Page Layout** tab. *The **Page Layout** tab is displayed.*	Click **Page Layout**

3. Select the Styles dialog box launcher in the Styles group. *The Styles pane is displayed.*	Click 
4. Select the New Styles button on the Styles pane. *The Create New Style from Formatting dialog box is displayed.*	Click 
5. Enter a name for the style in the Name box. *The desired style name is entered in the Name box.*	Type **StyleB** in the **Name** box.
6. Select the type of style you want to apply from the **Style type** drop down list. *The type of style is selected.*	Select **Paragraph** from the **Style type** list.
7. Proceed to define the formats for the paragraph.	Click **Increase paragraph spacing**
8. Select the **OK** button. *The dialog box closes and the paragraph style is applied to the selected text..*	Click 

Modify and Update a Paragraph Style

Steps

Modify and update a paragraph style.

If necessary, display the Style pane.

1. Select the text that uses the style you want to modify. *The formatted text is selected.*	Drag to select **Payment**
2. Select the **Manage Styles** button in the **Styles** pane. *The Manage Styles dialog box is displayed.*	Click 
3. Select the **Modify** button. *The Modify Style dialog box is displayed.*	Click **Modify**
4. Select the **Underline** button. *The underline button is activated.*	Click 
5. Select the **OK** button to close the **Modify Styles** dialog box. *The Modify Styles dialog box closes*	Click **OK**

6. Select the **OK** button to close the **Manage Styles** dialog box. *The Manage Styles dialog box closes and the selected Style is updated with the changes.*	Click 

Apply Multiple Column Layout

Concepts

Sometimes you need to give a Word document a multi-column format like a newspaper. Make use of Word 2013 columns feature to achieve that effect.

Steps

Open **COLUMNS.DOCX**.

1. Select the **Page Layout** tab. *The **Page Layout** tab is displayed.*	Click **Page Layout**
2. Select the **Columns** button in the **Page Setup** group. *The **Columns** menu opens.*	 Columns Click
3. Select the desired number of columns. *The document text appears in the selected number of columns.*	Click **Two**

Scroll to view page 2. Then, return to the top of the document. Notice that the header is not affected by the column format.

Changing Column Width and Spacing

Steps

Change column width and spacing.

1. Select the **Page Layout** tab. *The **Page Layout** tab is displayed.*	Click **Page Layout**

2. Select the **Columns** button in the **Page Setup** group. *The **Columns** menu opens.*	 Columns Click
3. Select the desired option from the menu. *The Columns dialog box appears.*	Click **More Columns...**
4. If necessary, deselect **Equal column width.** *The Equal column width option is deselected.*	Deselect 
5. Select the **Width** box. *The cursor appears in the Width box.*	Click inside the **Width** box.
6. Enter the desired width of the columns. *The desired width is entered in the box.*	Enter **2.85"** in the **Width** box.
7. Select the **Spacing** box. *The cursor appears in the Spacing box.*	Click inside the **Spacing** box.
8. Enter the desired column spacing. *The desired column spacing is entered in the box.*	Enter **0.3"** in the **Spacing** box.
9. Select the OK button. *The Columns dialog box closes and the settings are applied to the document.*	Click **OK.**

Inserting/Removing Lines Between Columns

Steps

Add a vertical line between columns.

1. Select the **Page Layout** tab. *The **Page Layout** tab is displayed.*	Click **Page Layout**
2. Select the **Columns** button in the **Page Setup** group. *The **Columns** menu opens.*	 Columns Click
3. Select the **More Columns** option. *The Columns dialog box opens.*	Click **More Columns...**

4. Select the **Line between** option. *The **Line between** option is selected and a line appears between each column in the **Preview** box.*	Click **Line between**
5. Select **OK.** *The Columns dialog box closes, and the vertical line appears between each column in the document.*	Click OK

Close **COLUMNS.DOCX.**

Inserting Fields

Concepts

As we create documents, we are always looking for shortcuts and timesavers that help us work more efficiently. The Quick Parts feature gives you access to premade document-building blocks, your own AutoText entries, document properties, and Word fields.

Steps

Open **FIELDS.DOCX**

If necessary, click on the right side of **File Name:** under the heading **Sales Report.**

1. Select the **Insert** tab. *The **Insert** tab is displayed.*	Click the **Insert** tab
2. Select the **Quick Parts** button in the **Text** group. *The **Quick Parts** menu opens.*	Click Quick Parts
3. Select the desired option from the menu. *The **Field** dialog box is displayed.*	Click **Field**
4. Select the field you want to insert from the Field names list. *The field name is selected.*	Click **FileName**
5. Select the **OK** button. *The Field dialog box closes and the filename field is inserted in the document.*	Click OK

Updating Fields

Steps

You decide to save a copy of the document using another file name. The **FileName** field will have to be updated to reflect the change.

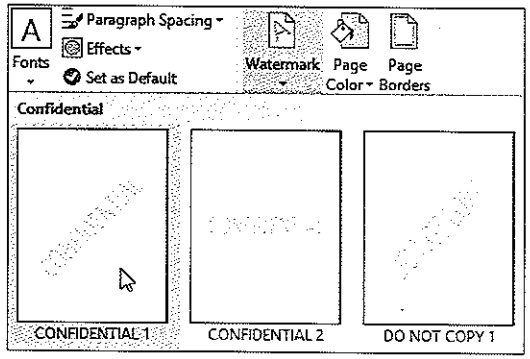
1. Select the **File** tab *The **Backstage** view opens*	Click **File**
2. Select an option from the menu. *The desired option is selected.*	Click **Save As**
3. Enter the desired file name in the File name box. *The file name is entered in the File name box.*	Type **SR2011**
4. Select the **Save** button. *The Save As dialog box closes and the file name is changed.*	Click Save
5. Select the field to the right of **File Name:** *The field is selected.*	Select the **Filename field**.
6. Press the **F9** key on the keyboard. *The field is updated and displays the new file name.*	Press **F9**.

Close the file without saving.

Creating Watermarks

Concepts

A watermark is a faded, background image that displays behind the text in a document. It can be used to indicate a document's status (confidential, draft, etc.) or to add a company logo.



Steps

Open **COLUMNS.DOCX**.

1. Select the **Design** tab. *The **Design** tab is displayed.*	Click **Design**
2. Select the **Watermark** button in the **Page Background** group. *The **Watermark** gallery opens.*	Click Watermark
3. Select the **Custom Watermark** option. *The Printed Watermark dialog box opens.*	Click **Custom Watermark**
4. To use a picture as a watermark, select the **Picture watermark** option. *The **Picture watermark** option is selected.*	Click **Picture watermark**
5. Select the **Select Picture** button. *The Insert Pictures dialog box opens.*	Click Select Picture...
6. Select the drive containing the picture file you want to insert. *A list of available folders and files is displayed. You can insert a picture from a file on your computer, select clip art from Office.com*	Click **From a file, Browse**
7. Select the picture file you want to insert. *The file is selected.*	Click **SKIJUMP**
8. Select the left-hand part of the **Insert** button. *The Insert Picture dialog box closes, and the name and path of the selected picture file appear in the Printed Watermark dialog box.*	Click Insert

10. Select **OK**. *The Printed Watermark dialog box closes, and the watermark appears in the document behind the existing text.*	Click **OK**

Preview the document, notice that the watermark appears on each page. The default formatting is **Washout**, so that the background image does not obscure the text.

Close the file.

Lesson 2 - Using Section Breaks

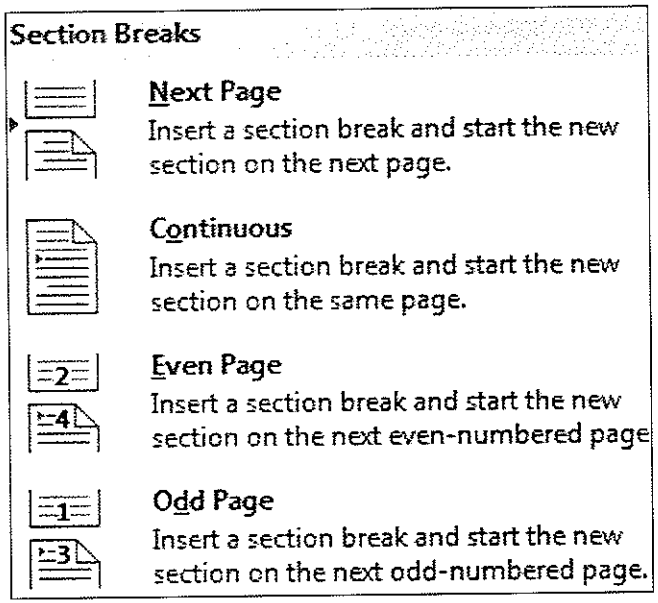
In this section, you will learn how to:

- Work with Section Breaks
- Create Section Breaks
- Change Page Orientation
- Changing Margins for a Section
- Apply Different Headers and Footers
- Apply First Page Header
- Insert Automatic Page Numbering

Working with Section Breaks

Concepts

You can create a section in order to format it differently from the rest of the document. If you want to change the margins, page layout, page orientation, column formats, page numbering, or headers and footers within part of a document, you can do that within a new section.



Creating Section Breaks

Steps

Open **AWARD1.DOCX**.
Insert a **Next Page** section break.

If necessary, show the formatting markings.

1. Position the insertion point where you want to create a new section. *The insertion point appears in the new location.*	Scroll as necessary and click to the left of the text **Information**

2. Select the **Page Layout** tab. *The **Page Layout** tab appears.*	Click **Page Layout**
3. Select the **Breaks** button in the **Page Setup** group. *The **Section Breaks** menu appears.*	Click Breaks
4. Select the **Next Page** option. *The **Section Breaks** menu closes, a **Next Page** section break appears at the insertion point, and the automatic pagination is adjusted accordingly.*	Click **Next Page**

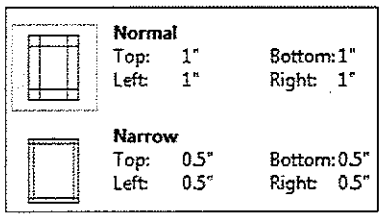
Changing Page Orientation

Steps

Format a section of a document.

1. Position the insertion point in the section you want to format. *The insertion point appears in the new location.*	If necessary, click to the left of the text **Information**
2. Select the **Page Layout** tab. *The **Page Layout** tab appears.*	Click **Page Layout**
3. Select the **Orientation** button in the **Page Setup** Group. *The selected layout is applied to the section.*	Orientation Click
4. Select the desired option. *The page changes to the selected layout.*	Click **Landscape.**

Changing Margins for a Section



Steps

Changing margins in a section.

1. Position the insertion point in the section you want to format. *The insertion point appears in the new location.*	If necessary, click to the left of the text **Information**
2. Select the **Page Layout** tab. *The **Page Layout** tab appears.*	Click **Page Layout**
3. Select the **Margins** button in the **Page Setup** Group.	 Margins Click
4. Select the desired option. *The page changes to the selected layout.*	Click **Narrow**.

Close **AWARD1.DOCX**.

Apply Different Headers and Footers

Concepts

You can make use of the different footer feature to change the page numbering format between content page and main document.

Steps

Open **DIFHEAD.DOCX**.

1. Position the insertion point in the section you want to format. *The insertion point appears in the new location.*	Browse to the 2nd Page
2. Select the **Insert** tab. *The **Insert** tab appears.*	Click **Insert**
3. Select the **Footer** button in the **Header and Footer** Group. *The list of options is displayed.*	 Footer Click
4. Select the Edit Footer option.	Click **Edit Footer**
5. Select the **Link to Previous** button to disable it. *The Link to Previous option is disabled.*	 Click
6. Use the Page number button to apply different numbering format for the page.	 Page Number Click
7. Select the desired option from the menu. *The desired option is selected.*	Select Current Position
8. Select the desired page number format. *The page number is inserted in the document.*	Select **Plain number**.

Close **DIFHEAD.DOCX**.

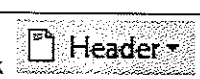
Apply First Page Header

Concepts

Microsoft Word provides a special first page header and footer that allows for a different header and footer for just the first page of a document or section. This reduces the number of sections needed in a document.

Steps

Open **FIRSTHEAD.DOCX**.

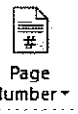
1. Select the **Insert** tab. *The **Insert** tab appears.*	Click **Insert**
2. Select the **Header** button in the **Header and Footer** Group. *The list of options is displayed.*	 Click

3. Select the desired option. *The Design tab is displayed.*	Click 
4. Select **Different First Page** in the **Options** group. *The Different First Page option is selected.*	Tick the **Different First Page box.**
5. Select the **Header** button in the **Header and Footer** Group. *The list of options is displayed.*	Click 
6. Select the desired header from the list. *The selected header is displayed on the first page only.*	Click **Tiles**

Insert Automatic Page Numbering

Steps

Insert page numbers in a document.

1. Select the page where you want to insert the header. *The page is selected.*	Navigate to the 2nd page of the document.
2. Select the **Insert** tab. *The **Insert** tab appears.*	Click **Insert**
3. Select the **Page Number** button in the **Header & Footer** group.	Click 
4. Select the desired option from the menu. *The desired option is selected.*	Select **Bottom of Page**
5. Select the desired page number format. *The page number is inserted in the document.*	Select **Accent Bar 1.**

Close **FIRSTHEAD.DOCX**

Practice - Using Section Breaks

Use a section break to modify the page format of a document.

1. Open **Serstbl.docx.**
2. Create a next page section break to place the table title, the table, and the graph on a separate section of the document.
3. Change the orientation of the page containing the table to landscape. (***Hint:*** *Select the Page Layout tab.*)
4. Select the **View** tab and use the **Two Pages** button to view the whole document. Then, select the **100%** button, and return to the **Page Layout** tab.
5. Switch to the **View** tab and view the whole document to see the sections.
6. Return to the normal sized view, and then close the document without saving it.

Lesson 3 -
Using Table Features

In this section, you will learn how to:

- Apply AutoFormat/Style
- Change Cell Margins
- Change Text Direction
- Change Text Alignment
- Repeat Heading Rows at Top of Each Page
- Set Table Row to Break Across Pages
- Add Table Formula
- Format Number Field
- Convert a Table into Text
- Convert Delimited Text To a Table

Apply Autoformat/Style

Concepts

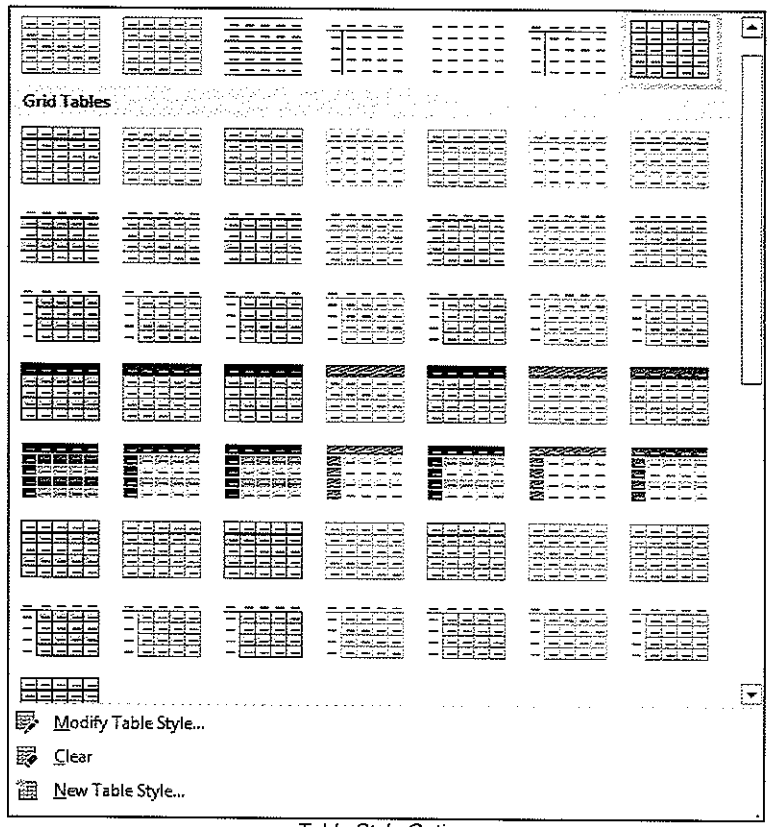


Table Style Options

Steps

From the Student Data directory, open **TableStyle.DOCX**.
Use table styles.

1. Position the insertion point anywhere in the table you want to format. *The insertion point appears in the new location, and the **TABLE TOOLS DESIGN** and **LAYOUT** tabs are made available on the **Ribbon**.*	Click anywhere in the table

2. Select the **DESIGN** tab. *The **DESIGN** tab is displayed.*	Click **DESIGN**
3. Position the pointer over the **Table Styles** option buttons in the **Table Styles** group to preview the formatting. *The table style is temporarily applied in live preview to the table in the document.*	Hover the pointer over any table style button in the **Table Styles** group
4. Scroll through or expand the list of table styles using the scroll or **More** buttons. *The **Table Styles** gallery is scrolled or opened, giving access to all available styles.*	Click
5. Select the desired table style. *The selected table style is applied to the table in the document and the **Table Styles** gallery closes.*	Scroll as necessary and click **Grid Table 4 – Accent 2.**

Changing Cell Margins

Concepts

Changing the cell margins in a Microsoft Word table is sometimes necessary to make sure that your text is readable. Changing the cell margins will change the spacing, often referred to as "padding," between the cell boundary and the text inside of that cell.

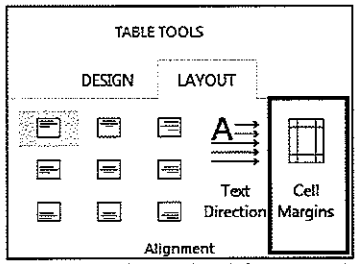
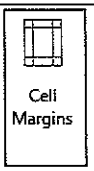


TABLE TOOLS LAYOUT Contextual tab

Steps

Change margins in table cells.

1. Select the cells you want format. *The cells are selected.*	Press **[Ctrl + A]** to select the entire table.
2. Select the **TABLE TOOLS LAYOUT** tab. *The **TABLE TOOLS LAYOUT** tab is displayed.*	Click **LAYOUT**

3. Click the **Cell Margins** button in the **Alignment** group to the desired orientation. *The table options dialog box appears.*	Click 
4. Enter the settings you want to apply to the table. *The table margin settings are entered.*	Enter **0.05"** for **both Top and Bottom** margins.
5. Select the OK button to apply the settings. *The cell margin settings are applied.*	Click **OK.**

Changing Text Direction

Concepts

You can change the text orientation in table cells so that the text is displayed vertically or horizontally. This is done using various commands in the Alignment group of the TABLES TOOL LAYOUT tab on the Ribbon.

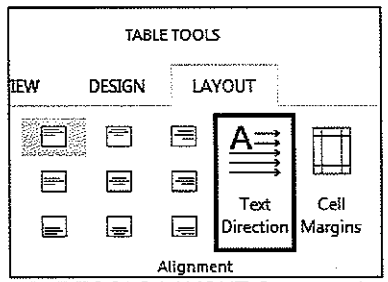


TABLE TOOLS LAYOUT Contextual tab

Steps

Rotate text in a table.

1. Select the cell(s) containing the text you want to rotate. *The cells are selected.*	Select the 2nd Row
2. Select the **TABLE TOOLS LAYOUT** tab. *The **TABLE TOOLS LAYOUT** tab is displayed.*	Click **LAYOUT**

3. Click the **Text Direction** button in the **Alignment** group to the desired orientation. *The text orientation changes accordingly.*	 Text Click Direction twice

Changing Text Alignment

Concepts

Text within a cell can be aligned just like a paragraph: left, center, or right. The text can also be aligned vertically: top, middle, or bottom. Combine these alignment options and you have an explanation for the nine buttons in the Alignment group of the Tool Tables Layout tab.

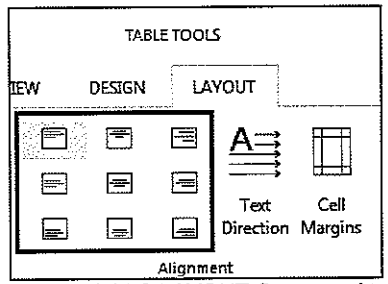


TABLE TOOLS LAYOUT Contextual tab

Steps

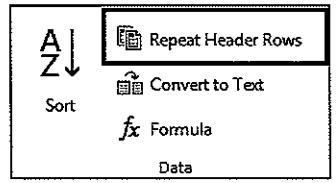
Align table text.

1. Select the cell containing the text you want to align. *The cell is selected.*	Click the cell containing the heading **Roll 'n' Relax Holiday Tours**
2. Select the **TABLE TOOLS LAYOUT** tab. *The **TABLE TOOLS LAYOUT** tab is displayed.*	Click **LAYOUT**
3. Select the desired **Align** button from the gallery in the **Alignment** group. *The text in the cell is aligned accordingly.*	Click **Align Center** (second row, second column)

Repeating Header Rows at Top of Each Page

Concepts

If you have built a long table that extends across two or more pages, you can create a table heading from the text appearing in the first row of the table, and Word will automatically repeat that row at the top of each page.



Steps

Repeating Heading Rows.

If necessary, switch to **Print Layout** view.

1. Select the row or rows you want to repeat as a table heading. *The rows are selected.*	Select the top two rows of the table
2. Select the **TABLE TOOLS LAYOUT** tab. *The **TABLE TOOLS LAYOUT** tab is displayed.*	Click **LAYOUT**
3. Select the **Repeat Header Rows** button in the **Data** group. *The table heading is created.*	Click 

Preview the document in Backstage view. Notice that the table heading appears on each page.

Close **TableStyle.DOCX**.

Stop Table Row to Break Across Pages

Concepts

When you create a Word table that is too long for one page, Word automatically splits your table so it appears on multiple pages. This is very useful, especially when your table is too big to fit on one page.

However, by default Word will split a single row across two pages as part of this if it decides it is necessary.

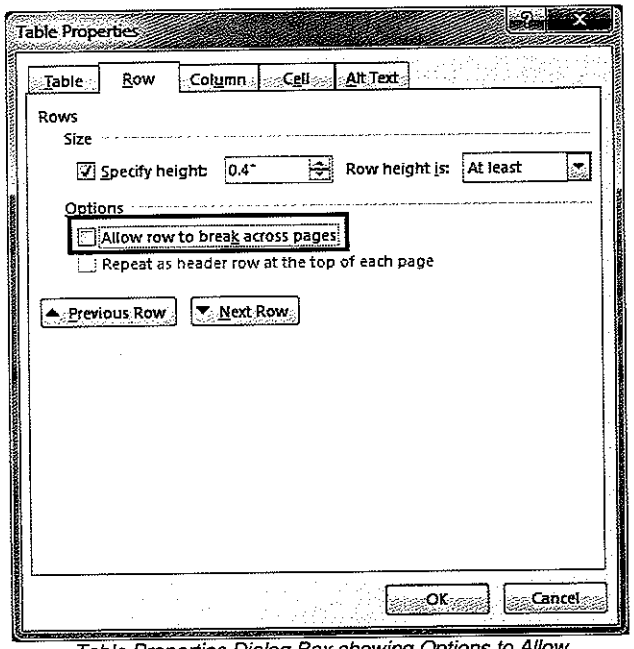


Table Properties Dialog Box showing Options to Allow Rows to break across pages

Steps

From the Student Data directory, open **TABLEBREAK.DOCX**.
Set table rows to break across pages.

Preview the document to view the table size and placement on the page.

1. Select the cell, row, or column you want to change. *The cell, row, or column is selected.*	Click the last row of that table
2. Select the **TABLE TOOLS LAYOUT** tab. *The **TABLE TOOLS LAYOUT** tab is displayed.*	Click **LAYOUT**
3. Select the **Properties** button in the **Table** group. *The Table Properties dialog box opens.*	Click Properties
4. Select the tab for the property you want to change. *The corresponding page is displayed.*	Click the **Row** tab, if necessary

5. Select the desired option. *The option is selected.*	Click Allow row to break across pages to deselect it
6. Select **OK**. *The Table Properties dialog box closes, and the selection is modified accordingly.*	Click **OK**

Note: Word will automatically repaginate the document to split the table so that each row is kept intact. This means that a row which was previously split between two pages will move onto the following page.

Close **TABLEBREAK.DOCX**.

Adding Formula in Table

Concepts

If you're using Microsoft Word to present a table of data that includes numbers, you can use Word's built in formulas to add up those numbers rather than manually calculate them each time they change. This can also eliminate the possibility of error - particularly important if you're producing a sales proposal or an important report.

Note: You can't just add up numbers on different lines - you can only add up numbers that are presented in either a column or a row inside a table.

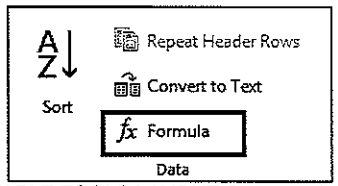
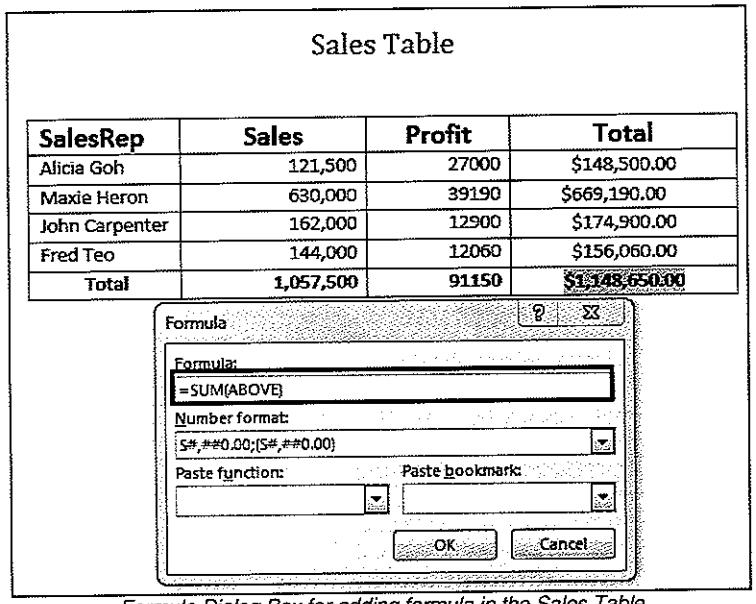


TABLE TOOLS LAYOUT Contextual tab Showing Formula button



Formula Dialog Box for adding formula in the Sales Table

Steps

From the Student Data directory, open **SALESTABLE.DOCX.**
Inserting a formula in a table

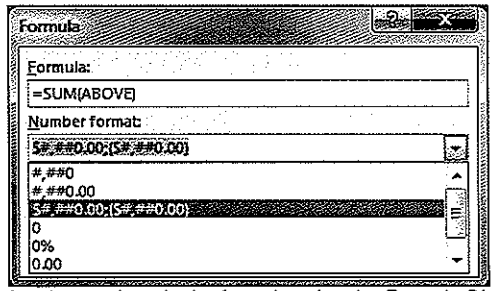
1. Select the cell where you want the formula to be inserted. *The cell empty cell is selected.*	Select the empty cell to the right of **Profit.**
2. Select the **LAYOUT** tab under the **TABLE TOOLS** contextual tab. *The Layout ribbon is displayed.*	Click **LAYOUT**
3. Select the **Formula** button in the Data group. *The Formula dialog box appears.*	Click *fx* Formula
4. Select the format you want to apply from the Number format drop-down list. The number format is selected.	Select $#,##0.00;($#,##0.00) from the Number format list.
5. Select the OK button to insert the formula. *The Formula dialog box closes and the formula is inserted in the table.*	Click **OK**

You can press **[Alt+F9]** to view the formula results instead of the field codes. Change the Profit value for **Alicia Goh** from **27,000** to **17,000**. Notice that the value in the Total column

is not changed. To refresh the value, you press **F9.** Notice, that the value in the Total column is updated now.

Formatting Number Field

Concepts



Formatting the numbers in the formula using the Formula Dialog Box

Sales Table

SalesRep	Sales	Profit	Total
Alicia Goh	121,500	27000	$148,500.00
Maxie Heron	630,000	39190	$669,190.00
John Carpenter	162,000	12900	$174,900.00
Fred Teo	144,000	12060	$156,060.00
Total	**$1,057,500.00**	**$91,150.00**	**$1,148,650.00**

Sales Table showing the Total Row formatted as Currency

Steps

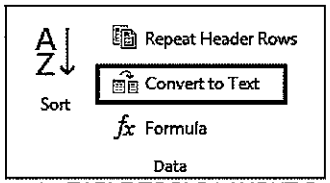
Formatting a number field.

1. Select the field that you want to format. *The field is selected.*	Select the formula field next to **Total** under the **Sales** column.
2. Select the **LAYOUT** tab under the **TABLE TOOLS** contextual tab. *The Layout ribbon is displayed.*	Click **LAYOUT**
3. Select the **Formula** button in the Data group. *The Formula dialog box appears.*	Click *fx* Formula

4. Select the format you want to apply from the Number format drop-down list. *The number format is selected.*	Select **$#,##0.00;($#,##0.00)** from the Number format list.
5. Select the OK button to apply the format to the field. *The dialog box closes and the formatting is applied to the field.*	Click **OK.**

Converting a Table into Text

Concepts



Data group under TABLE TOOLS LAYOUT Contextual tab Showing Convert

Month	Earnings for 2011	Earnings for 2012
January	$289	$359
February	$324	$659
March	$453	$260
April	$620	$589

Word Table

Month	Earnings for 2011	Earnings for 2012
January	$289	$359
February	$324	$659
March	$453	$260
April	$620	$589

Table converted to Text

Steps

From the Student Data directory, open **Earnings.docx**.
Convert a table into text.

1. Select the table rows you want to convert. *The table rows are selected.*	Select the entire table

2. Select the **Table Tools Layout** tab. *The **Table Tools Layout** tab is displayed.*	Click **Layout**
3. Select the **Convert to Text** button in the **Data** group. *The Convert Table To Text dialog box opens.*	Select Convert to Text
4. Under **Separate text with**, select the desired option. *The option is selected.*	Click **Tabs**
5. Select **OK.** *The Convert Table To Text dialog box closes, and the table is converted to text.*	Click **OK**

Click anywhere to deselect the text.

Display the formatting marks. Notice that a tab now appears in place of each column marker and a paragraph mark has replaced each end of row mark. Hide the formatting marks.
Close **Earnings.docx**.

Converting Delimited Text to a Table

Concepts

IF you have a list created in Word and you want the list to be converted to a table, you can use the **Convert Text to Table** feature in Word.

Steps

From the Student Data directory, open **TEXTTAB.DOCX**.
Convert existing text into a table.

1. Select the text you want to convert into a table. *The text is selected.*	Press **[Ctrl+A]**
2. Select the **Insert** tab. *The **Insert** tab is displayed.*	Click **Insert**
3. Select the **Table** button in the **Tables** group. *The **Insert Table** menu opens.*	Click Table
4. Select the **Convert Text to Table** option. *The Convert Text to Table dialog box opens.*	Click **Convert Text to Table**

5. If necessary, specify the desired number of table columns in the **Number of columns** spin box under **Table size**, or select the desired **Separate text at** option. *The number in the **Number of columns** spin box changes accordingly or the appropriate option is selected.*	Click **Tabs**, if necessary
6. Select the desired **AutoFit behavior** option. *The desired **AutoFit behavior** option is selected.*	Click **Fixed column width** to **Auto**, if necessary
7. Select **OK**. *The Convert Text to Table dialog box closes, and the existing text is converted into a table.*	Click **OK**

Click anywhere in the document to deselect the table.
Close **TEXTTAB.DOCX**.

Exercise - Using Table Features

Open **TABLEEX1.DOCX**.

Using table features.

1. Select any cell inside the table.
2. Select the **Design** tab under the title **Table Tools**.
3. Apply the **Light List – Accent 4** format to the table
4. Open **EQUIPTBL.DOCX**.
5. Select the contents of the entire document.
6. Display the **Insert** tab.
7. Use the **Table** button in the **Tables** group to convert the selected text into a table. Use the tilde character (~) as the text separator (type it in the **Other** text box). Word should suggest two columns. If necessary, select a fixed column width of **Auto**. (***Hint:*** *The tilde character (~) is usually located above the **[Tab]** key, in the upper, left corner of the keyboard.*)
8. Deselect the text to view the table.

Lesson 4 -
Working with Comments and Revisions

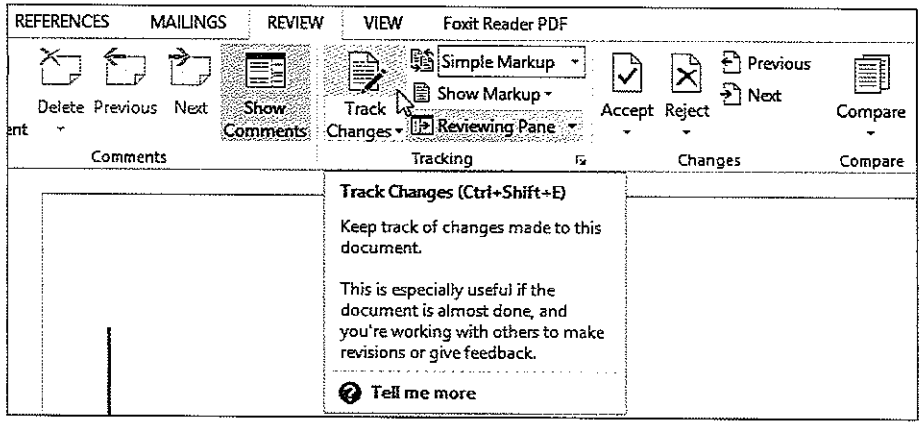
In this section, you will learn how to:

- Enabling Change Tracking
- Setting Change Tracking Options
- Disabling Change Tracking
- Comparing Documents
- Viewing Tracked Changes
- Accepting/Rejecting All Changes
- Inserting Comments
- Managing Comments
- Viewing and Navigating Comments

Enabling Change Tracking

Concepts

Hardcopy editing or proofing with a red pen has been necessary to suggest or make changes to written text. If a document is reviewed, revised, or edited by you or others, you can use revision marks to track changes made by the various reviewers. The **Track Changes** feature in Word is a valuable tool for making or suggesting changes to a document, right in the document itself. The changes are highlighted may be "accepted" or rejected by the author once the document has been returned.



Steps

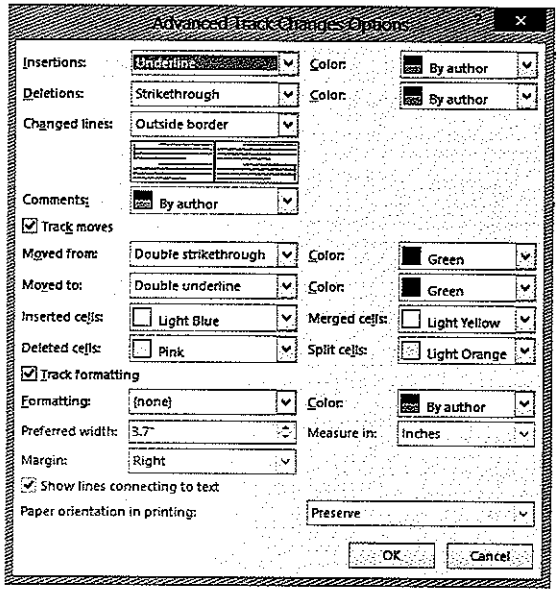
Open **TRACK1.DOCX.**
Enabling change tracking.

1. Select the **Review** tab on the **Ribbon.** *The **Review** tab is displayed.*	Click **Review**
2. Select the top part of the **Track Changes** button in the **Tracking** group. *The button changes color and change tracking is enabled.*	Click **Track Changes**

Setting Change Tracking Options

Concepts

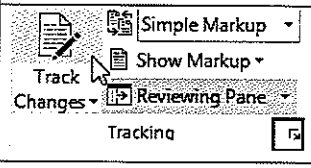
The Track Changes Options include an Advanced Options button that allows the user to set markup formatting, indicators and color for each classification



Steps

Set change tracking options.

If necessary, switch to **Print Layout** view and activate change tracking.

1. Select the **Review** tab on the **Ribbon**. *The **Review** tab is displayed.*	Click **Review**
2. Click at small arrow at the bottom right corner of the ***Tracking*** option box under the **Review** tab. *The* **Change Tracking Options** *dialog is displayed.*	

3. Select **Change Tracking Options** from the menu. *The Track Changes Options dialog box opens.*	Click **Change Tracking Options**
4. Select the desired options. *User may enable or disable the detailed tracking indicators and adjust markup view and reviewing pane according. In addition, user names can be changed by clicking the Change User Name button at the bottom right of the window.*	Click **Advanced Options**
5. Modify the **Insertions** drop down list.	Select **Double underline**
5. Select **OK**. *The Track Changes Options dialog box closes.*	Click OK

Disabling Change Tracking

Steps

Disable change tracking.

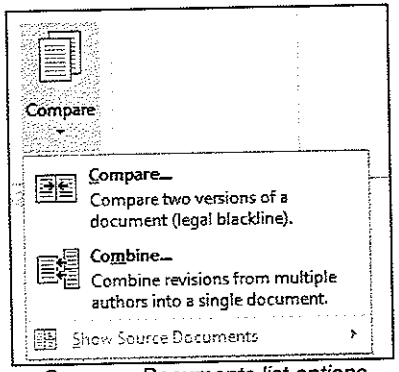
1. Select the **Review** tab on the **Ribbon**. *The **Review** tab is displayed.*	Click **Review**
2. Select the top part of the **Track Changes** button in the **Tracking** group. *The button changes color and change tracking is disabled.*	Click **Track Changes**

Close **TRACK1.DOCX**.

Comparing Documents

Concepts

If you want to compare an earlier version of a document with the current version of a document, you can compare the documents and then merge the changes into one document



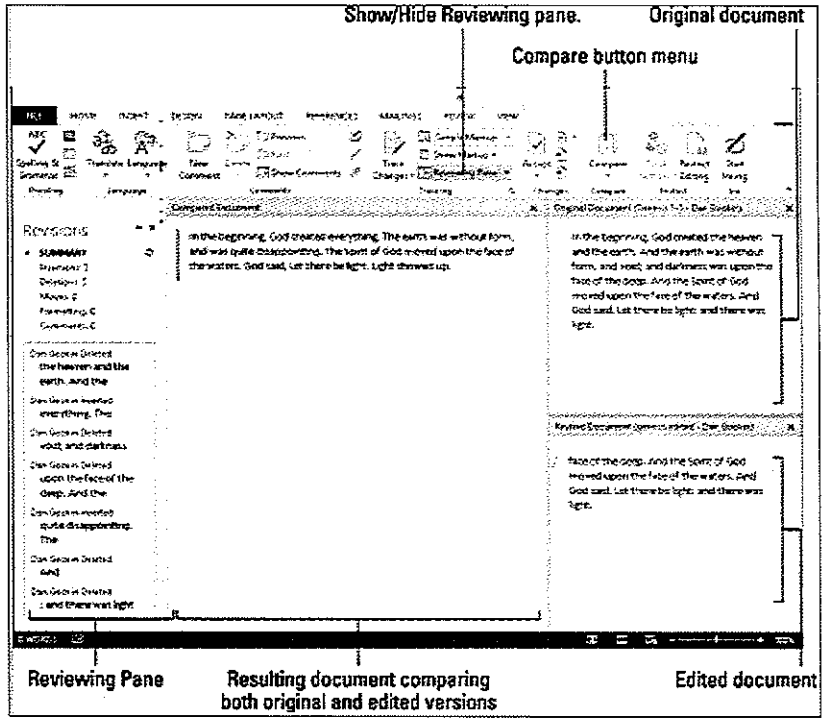
Compare Documents list options

Steps
Compare two documents.

If necessary, close any open documents (including blank documents, but keep Word open).

1. Select the **Review** tab. *The **Review** tab is displayed.*	Click **Review**
2. Select the **Compare** button in the **Compare** group. *The **Compare** menu opens.*	Click 
3. Select **Compare** from the menu. *The Compare Documents dialog box opens.*	Click the **Compare** option in the menu
4. Select the **Browse for Original** button to the right of the **Original document** box. *The Open dialog box opens.*	Click beside the **Original document** box
5. Open the folder where the file you want to merge is stored . *The filename is displayed in the **Original document** box.*	Select the original document **REV_1.DOCX**
6. Select the **Browse for Revised** button to the right of the **Revised document** box. *The filename is displayed in the **Revised document** box and the name of the last person who saved changes in the Revised document is displayed in the **Label changes with** box.*	Select the **Revised** document **REV_EK.DOCX**

7. Select the **OK** button. *The documents are compared and a new version of the document with the differences marked as tracked changes is displayed in the Compared Document pane. The Vertical Reviewing Pane is displayed to the left of the Compared Document pane. The Original Document and Revised Document are displayed in two more panes to the right of the Compared Document pane.*	Click OK

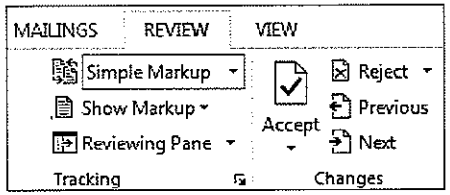


Viewing Tracked Changes

Concepts

The only way to get tracked changes out of a document is to accept or reject them. Choosing No Markup in the Display for Review box helps you see what the final document will look like—but it only hides tracked changes temporarily. The changes are not deleted,

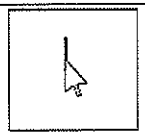
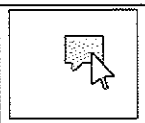
and they'll show up again the next time anyone opens the document. To delete the tracked changes permanently, accept or reject them.



Steps

Review tracked changes.

If necessary, select the **Review** tab. Open the **REVISED.DOCX**.

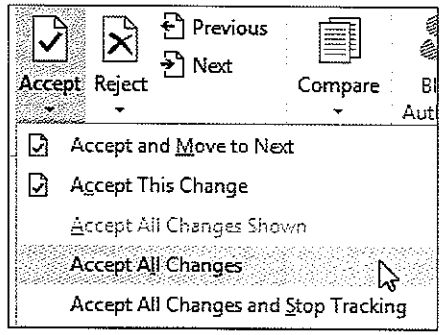
1. Position the insertion point where you want to begin reviewing changes. *The insertion point moves to the selected position.*	Press **[Ctrl+Home]**
2. Select the **Review** tab. *The **Review** tab is displayed.*	Click **Review**
3. Select Simple Markup from the drop-down menu.	Click **Simple Markup**
4. Word marks up any changes that anyone makes to the document and shows you where the changes are by displaying a line near the margin.	
5. Word shows a little balloon where someone's made a comment	

Accepting/Rejecting All Changes

Concepts

There are multiple ways to accept the changes suggested in your document. You can highlight and choose each change and accept them individually, or simply click on the Accept button, allowing the app to scroll through the document for you. Finally, you can

simply Accept All Changes at once, or Accept All Changes and Stop Tracking at the same time.



Steps

Accept or reject all tracked changes.

If necessary, switch to **Print Layout** view

1. Select the **Review** tab. *The **Review** tab is displayed.*	Click **Review**
2. Position the insertion point where you want to begin reviewing changes. *The insertion point moves to the selected position.*	Press **[Ctrl+Home]**
3. Accepting a change. *The markup will disappear, and Word will automatically jump to the next change. You can continue accepting or rejecting each change until you have reviewed them all.*	Click the **Accept**
4. Select **Accept All Changes Shown.** *All changes currently displayed are accepted and the appropriate revision marks and markup balloons are removed from the document. Comments are not classed as a change and remain in the document*	Click **Accept All Changes**

Close **REVISED.DOCX**.

Inserting Comment

Steps

Open **COMMENT.DOCX**.

If necessary, switch to **Print Layout** view.

1. Select the text to which you want to attach a comment. *The text is selected.*	Drag to select the first paragraph heading
2. Select the **Review** tab. *The **Review** tab is displayed.*	Click **Review**
3. Select the **New Comment** button in the **Comments** group. *A new balloon appears in the **Markup Area** and comment marks surround the selected text.*	Click 
4. Enter the desired comment. *The comment text appears in the markup balloon.*	Type ***Include more offerings***
5. Click anywhere outside the markup balloon. *The insertion point appears in the document text.*	Click anywhere outside the markup balloon

Managing Comments

Steps

View comments in a document.

If necessary, switch to **Print Layout** view

1. Select the **Review** tab. *The **Review** tab is displayed.*	Click **Review**
2. Select the **Show Markup** button in the **Tracking** group. *A list of available options is displayed.*	Click **Show Markup**
3. Point to **Reviewers.** *A list of all document reviewers is displayed.*	Point to **Specific People**

4. Select or deselect the reviewer whose comments you want to view or hide, respectively, or select **All Reviewers**. *The comments of the selected reviewers or those of all reviewers appear or are hidden accordingly.*	Click **All Reviewers**

Viewing and Navigating Comments

Steps

Manage comments in a document.

If necessary, switch to **Print Layout** view (select this from the **Document Views** group on the **View** tab).

1. Position the insertion point where you want to begin reviewing comments. *The insertion point moves to the selected position.*	Press **[Ctrl+Home]**
2. Select the **Review** tab. *The **Review** tab is displayed.*	Click **Review**
6. Select the **Next** button in the **Comments** group. *The insertion point moves to the next visible comment.*	Click **Next**
7. To return to a previous comment, select the **Previous** button in the **Comments** group. *The insertion point moves to the previous comment.*	Click **Previous**
9. To delete the currently selected comment, if desired, select the left-hand part of the **Delete** button in the **Comments** group. *The comment is deleted.*	Click **Delete**

Close **COMMENT.DOCX**.

Exercise - Working with Revisions and Comments

Enter a comment and view existing comments in balloons and the Reviewing Pane. Enable and use change tracking, then disable it. Combine multiple documents and review the changes.

1. Open **INVITEX.DOCX** from the student data folder.
2. Enable change tracking.
3. Set the following change tracking options:

Markup options	Selection
Insertions	Italic
Changed lines	Outside Border
Changed lines color	Auto
Comments (color)	By author
Formatting	Double underline

4. Change the first line of the document from **You are invited** to **You are cordially invited.**
5. Disable change tracking.
6. Combine **INVITE2U.DOCX** into the current document.
7. Accept the first two changes in the document.
8. Select **Final** from the **Display for Review** list on the **Reviewing** toolbar. Notice that all markup is hidden.
9. Select **Original Showing Markup** from the **Display for Review** list on the **Reviewing** toolbar. Notice that original text is now shown as deletions in the text and insertions are displayed in balloons.
10. Accept all changes in the document.
11. Choose **Save As** and save the document as **INVITEFINAL.DOCX.**

compare – 2 docs

combine – more than 2 docs
max 3

Lesson 5 - Using Forms & Protection

In this section, you will learn how to:

- Create a form
- Set properties for controls
- Protect a form
- Save a form as a template
- Restrict document editing

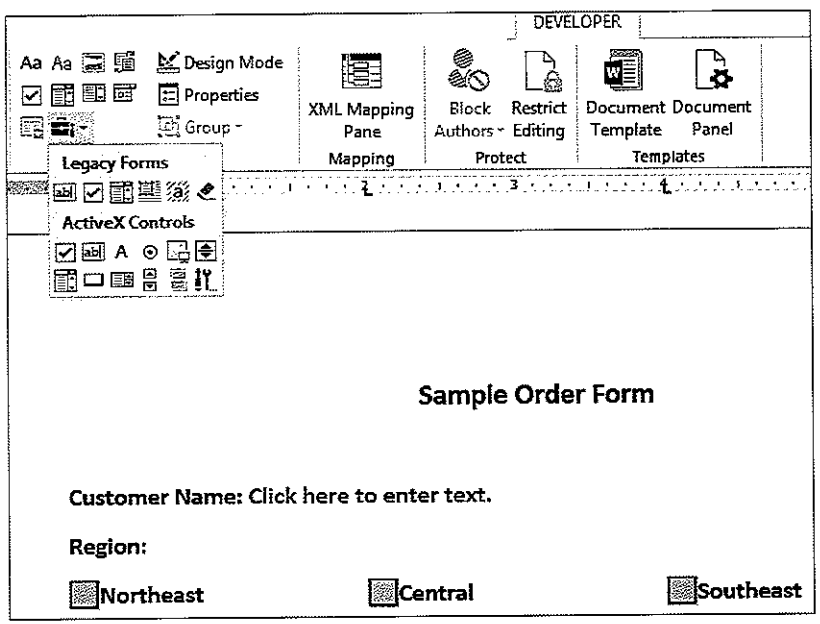
Creating a Form

Concepts

Forms enable you to collect information from people via a fill-in-the-blanks interface. The forms you create in Word can be printed and completed on paper or filled out from within Word.

You should always protect an online form; otherwise, any user can change the form text or layout. When a form is protected, a user can enter data into the form fields, but cannot edit the form or change any text on it.

When you are creating or working with forms, you need to display the **Developer** tab on the **Ribbon**.



Steps

Open **CUSTPR1.DOCX**.
Create a form by adding content controls to a template or document.

If necessary, display the formatting marks.

1. Select the **File** tab *The **Backstage** view opens*	Click **File**
2. Select **Options**. *The Word Options dialog box opens and the **Popular** options page is displayed by default.*	Click Options
3. Select **Customize Ribbon.** *The options for customizing the ribbon are displayed.*	Click **Customize Ribbon**
4. In the Main Tabs list on the right, select Developer. *Developer is selected.*	Click Developer
5. Select the OK button. *The Word Options dialog box closes.*	Click **OK**
5. Select the **Developer** tab on the **Ribbon**. *The **Developer** tab is displayed.*	Click **Developer**
6. Position the insertion point where you want to insert a content control. *The insertion point is placed in the desired location.*	Click to the right of the tab character on the **Company Name** line
7. Select the desired content control in the **Controls** group. *The **Rich Text** content control is displayed in the document.*	Click **Rich Text** content control
8. Position the insertion point where you want to insert a **Legacy Tools** control. *The insertion point is placed in the desired location.*	Click to the left of **Northeast**
9. Select the **Legacy Tools** button. *The **Legacy Tools** gallery appears.*	Click
10. Select the desired control from the **Legacy Tools** gallery. *The Check Box Form Field is displayed in the document.*	Under **Legacy Forms,** click

Setting Properties for Controls

Steps

Open **CUSTPR1.DOCX,** if necessary .
Set properties for content controls.

If necessary, display the formatting marks and the **Developer** tab.

1. In the **Controls** group on the **Developer** tab, select **Design Mode**. *The **Design Mode** button is highlighted to indicate that the mode is enabled. Content controls in the document change to Design Mode appearance.*	Click 
2. Select the desired content control in the document for which you want to edit the instructional text. *The **Rich Text** content control changes to edit mode.*	Click on the **Rich Text** content control with the text **Click here to enter text**
3. Edit the instructional text as desired. *The instructional text is changed accordingly.*	Edit the text to read **Click here and enter the company name.**
4. In the **Controls** group on the **Developer** tab, select **Design Mode**. *The **Design Mode** button highlighting is removed to indicate that the mode is disabled. Changes to instructional text are saved. Content controls in the document change to their normal appearance.*	Click 
5. Select the desired content control in the document for which you want to edit the properties. *The **Drop-Down List** content control is highlighted and the **Properties** button in the **Controls** group on the **Developer** tab is enabled.*	Click on the **Drop-Down List** content control with the text **Choose an item**
6. In the **Controls** group on the **Developer** tab, select **Properties**. *The Content Control Properties dialog box opens.*	Click 
7. Edit the properties as desired. *The properties are defined accordingly.*	Follow the instructions shown below the table before continuing on to the next step
8. Select **OK** in the Content Control Properties dialog box. *The Content Control Properties dialog box closes and the properties are assigned to the content control accordingly.*	Click 

Click the **Add** button and type **Retail** in the **Display Name** box in the Add Choice dialog box. Select **OK**. Notice that **Retail** has been added to the **Drop-Down List Properties** list in the Content Control Properties dialog box.

In the same way, add **Wholesale** and **Distributor** to the **Drop-Down List Properties** list.

Return to the table and continue on to the next step (step 8).
Close **CUSTPR1.DOCX**.

Protecting a Form

Steps

Protect a form.

1. Select the **Developer** tab from the **Ribbon**. *The **Developer** tab is displayed*	Click **Developer**
2. Select the **Restrict Editing** button from the **Protect** group. *The **Restrict Formatting and Editing** task pane opens.*	 Restrict Editing Click
3. Select the desired editing restriction options from the **Restrict Formatting and Editing** task pane. *The **Editing restrictions** list box is activated and the **Exceptions (optional)** list is displayed.*	Check the box next to **Allow only this type of editing in the document**
4. Select the **Editing restrictions** list. *A list of options is displayed.*	Click **Editing restrictions** 
5. Select the **Filling in forms** option. *The desired option is selected and the **Exceptions (optional)** list closes.*	Click **Filling in forms**
6. Select the **Yes, Start Enforcing Protection** button. *The Start Enforcing Protection dialog box opens and an insertion point is placed in the **Enter new password (optional)** field.*	Click  Yes, Start Enforcing Protection
7. Type a password into the **Enter new password (optional)** field. *An asterisk is entered for each character of the password.*	Type ***Pr0t3ct70rm***
8. Select the **Reenter password to confirm** field. *An insertion point is placed in the required field.*	Press **[Tab]**

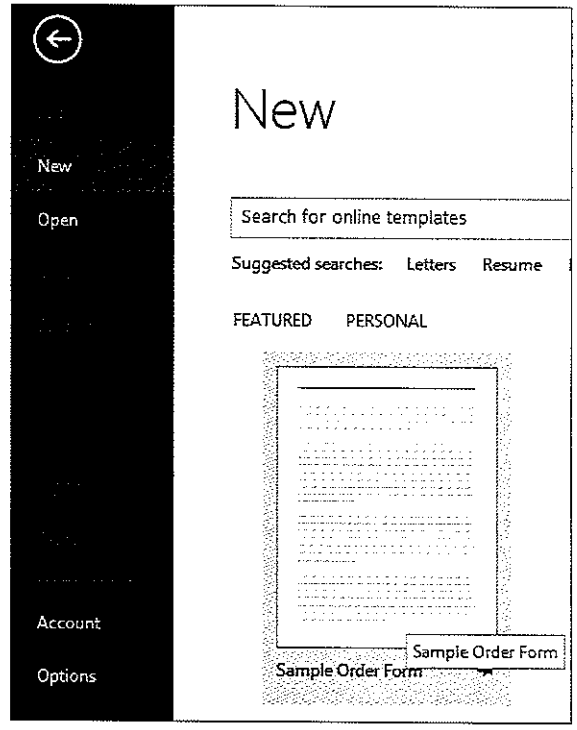
9. Retype the password in the **Reenter password to confirm** field. *An asterisk is entered for each character of the password.*	Type ***Pr0t3ct70rm***
10. Select **OK**. *The Start Enforcing Protection dialog box closes. A message is displayed in the **Restrict Formatting and Editing** task pane informing you that the document is protected from unintentional editing. A **Stop Protection** button appears at the bottom of the task pane.*	Click OK
11. Close the **Restrict Formatting and Editing** task pane. *The **Restrict Formatting and Editing** task pane closes and the document window is maximized.*	Click

Saving a Form as a Template

Steps

Save a form as a template.

1. Select the **File** tab *The **Backstage** view opens*	Click **File**
2. Select **Save As**. *The Save As dialog box opens with the text in the **File name** box selected.*	Click **Save As**
3. Type the desired template name. *The text is entered in the **File name** box.*	Type ***Sample order Form***
4. Select the **Save as type** list. *A list of available file types is displayed.*	Click **Save as type**
5. Select **Word Template (*.dotx)**. ***Word Template (*.dotx)** is displayed in the **Save as type** box.* *Notice the default location is in **Custom Office Template.***	Click **Word Template (*.dotx)**
6. Select **Save**. *The Save As dialog box closes, and the form is saved as a template.*	Click Save



Close ***Sample order Form*.DOTX**.

Exercise - Using Forms



Create a form and a template.

1. Open **CUSTORD.DOCX**.
2. Display the paragraph markings in the document and the **Developer** tab on the **Ribbon**.
3. Add the following products to the **Drop-Down List** control in with these entires:
   Life-Fit Treadmill
   Treadmaster Treadmill
   Life-Fit Exercise Bike
   Exer-Fit Stepper
4. Add a **Date Picker** content control to the right of the tab on the **Delivery Date** line.
5. Using the **Legacy Tools** gallery, remove the shading from the **Check Box Form Fields**.
6. Protect the document by setting an editing restriction that allows people to fill in the form only.
7. Enforce protection of the form using a suitable password.
8. Close the **CUSTORD.DOTX** without saving changes.

Lesson 6 - Creating Master Documents

In this section, you will learn how to:

- Use a master document
- Insert subdocuments
- Collapse/Expand subdocuments
- Unlink subdocuments
- Split and merge subdocuments
- Lock subdocuments
- Open subdocuments

Using a Master Document

Concepts

It is often easier to manage a long document by working in smaller, separate documents. You can then use the **Master Document** feature to display and manage each of the separate documents in one combined document. Each document linked to a master document is called a subdocument. Subdocuments appear as outline levels in **Outline** view.

A master document can be created in **Outline** view from either a new or an existing document. You can insert one or more existing files as subdocuments. You can also use the **Create Subdocument** button to create a new subdocument without leaving the master document; Word will create and save the new document, using its first level heading as the file name.

Master documents allow you to view document flow, rearrange files as needed, and generate both a table of contents and an index for the entire document, including all subdocuments. You can also expand or collapse the master document to display or hide the subdocument text.

The subdocuments are linked to the master document. The subdocument source file is automatically updated whenever any changes are made to it within the master document. The master document is updated as well whenever changes are made to any of its subdocument files.

The **Outlining** tab provides buttons used to create, insert, and manage the master document and its subdocuments.

Steps

From the Student Data directory, open **MASTER.DOCX.**
Use a master document.

If necessary, display the formatting marks.

1. Select the **View** tab on the **Ribbon**. *The **View** tab is displayed.*	Click **View**
2. Click the **Outline** button in the **Document View** group. *The document is displayed in **Outline** view. The **Outlining** tab is displayed on the **Ribbon**.*	 Click Outline

Inserting Subdocuments

Concepts

Files inserted into a master document are called subdocuments. Subdocuments are linked to their source files. Therefore, changes made to a source file are automatically updated to the master document.

When you insert a subdocument into a master document, the subdocument text appears in **Outline** view. You can then use buttons available on the **Outlining** tab to collapse and expand the subdocument.

Word inserts a **Next Page** section break before each subdocument you insert and a **Continuous** section break after it.

If the master document and the subdocuments contain duplicate style names with different formatting, the subdocument text adopts the master document formatting when inserted into the master document. For example, if the **Heading 2** style is left-aligned in the subdocument but centered in the master document, all subdocument text formatted with the **Heading 2** style will be centered in the master document.

Steps

Insert subdocuments into a master document.

If necessary, switch to **Outline** view and display the **Outlining** tab.

1. Position the insertion point in the document where you want to insert a subdocument. *The insertion point is placed in the desired location.*	Press **[Ctrl+End]**
2. Select the **Show Document** button. *The **Master Document** group of buttons is displayed.*	 Click Show Document
3. Click the **Insert** button in the **Master Document** group. *The Insert Subdocument dialog box opens.*	Click 
4. Select the drive where the file you want to insert is stored. *A list of available folders is displayed.*	Click the student data drive

5. Open the folder where the file you want to insert is stored. *A list of available folders and files is displayed.*	Double-click the student data folder
6. Select the file you want to insert. *The file is selected.*	Click **PRODUCT6.DOCX**
7. Select the left part of the **Open** button. *The Insert Subdocument dialog box closes, and a Word message box may open asking if you want to rename a style found in both the subdocument you wish to insert and the master document.*	Click 
8. If a Word message box opens, asking if you want to rename a style found in both the subdocument you wish to insert and the master document, select **Yes**. *The Word message box closes. The subdocument file is inserted into the master document and the **Collapse Subdocuments** button in **the Master Document** group is highlighted.*	Click 

Practice the Concept: Insert **BENEFIT6.DOCX** and then **TERMS6.DOCX** as subdocuments at the end of the master document.

At the top of the document, select and right-click the **Error! No table of contents entries found. {TOC}** field code. Update the table of contents by selecting Update Field from the shortcut menu. Display the formatted table of contents in **Print Layout** view using the **View Shortcuts** button on the status bar. Then, switch back to **Outline** view.

Click the **Show Level** list in the **Outline Tools** group on the **Outlining** tab to display only level 2 and above. Then, display all the outline levels again.

Save the file to the student data folder as **Master2.docx**.

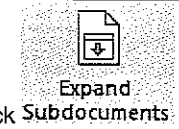
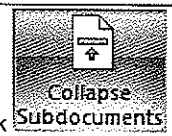
Collapsing/Expanding Subdocuments

Steps

Collapse and expand subdocuments in a master document.

If necessary, switch to **Outline** view and display the **Outlining** tab.

Press **[Alt+F9]** to display the **{TOC}** field code instead of the table of contents text.

1. Click the **Expand Subdocuments** button in the **Master Document** group. *The text for all inserted subdocuments is displayed.*	 Click
2. Click the **Collapse Subdocuments** button in the **Master Document** group. *The inserted subdocuments are displayed as hyperlinks with the path and filename of the source file.*	 Click

Unlinking Subdocuments

Steps

Unlink a subdocument.

Switch to **Outline** view, if necessary. Then, expand the subdocuments.

1. Select the subdocument you want to unlink. *The subdocument is selected.*	Scroll down and click anywhere in the subdocument under the **Terms and Conditions of Sale** heading
2. Select the **Unlink** button in the **Master Document** group. *The link is removed and the text of the subdocument is copied into the master document.*	Click 

Splitting and Merging Subdocuments

Steps

Split and merge a subdocument.

Switch to **Outline** view, if necessary, then select the **Expand Subdocuments** button to display the text of all subdocuments.

1. Place the insertion point at the point where you want to split the subdocument. *The insertion point is placed in the desired location.*	Click just before the **Clothing** subheading in the first subdocument

2. Select the **Split** button in the **Master Document** group. *The subdocument is split in the master document. The contents of the original subdocument are divided between the original subdocument file and a new file that contains all the content after the insertion point.*	Click Split
3. Select the contents of the subdocuments you want to merge. *The text in the subdocuments is highlighted as you drag.*	Drag to select the contents of the split subdocuments (from the **Products Distributed** heading in the first split document to the end of paragraph headed **Memorabilia**, including any blank paragraphs at the end)
4. Release the mouse button. *The text in the subdocuments is selected.*	Release the mouse button
5. Select the **Merge** button in the **Master Document** group. *The content is merged in both the master document and the first subdocument file.*	Click Merge

The new file created when the subdocument was split still exists, containing the content from the start of the split to the end of the original subdocument. However, it is no longer linked to the master document and can be deleted safely.

Locking Subdocuments

Steps

Lock a subdocument.

Switch to **Outline** view, if necessary. Then, select the **Expand Subdocuments** button to display the text of all subdocuments.

1. Select the subdocument you want to lock. *The subdocument is selected.*	Click anywhere in the first subdocument.
2. Select the **Lock Document** button in the **Master Document** group. *The subdocument is locked. A padlock is displayed against the subdocument in the left margin of the master document.*	Click Lock Document

The subdocument can only be opened in **Read-Only** mode.

Opening Subdocuments

Steps

Open a subdocument.

Switch to **Outline** view, if necessary. Then, select the **Expand Subdocuments** button to display the text of all subdocuments. All documents should be unlocked.

Open **PRODUCT6.DOCX** and view the **Products Distributed by Worldwide Sporting Goods** heading. This is the same heading text that is displayed in the master document. Then, close **PRODUCT6.DOCX**.

In **MASTER2a.DOCX**, type **, *Inc.*** at the end of the **Products Distributed by Worldwide Sporting Goods** heading at the top of the first subdocument.

1. Double-click the subdocument icon to the left of the subdocument you want to open. *The subdocument opens in its own application window.*	Double-click to the left of the first subdocument

Notice that the text **, Inc.** has been updated to the source file, **PRODUCT6.DOCX**.

Close **MASTER2.DOCX**.

Exercise - Creating Master Documents



Create a master document.

1. Create a new, blank document.
2. Switch to **Outline** view and insert the following subdocuments: **INVITE.DOCX, DIRECTN.DOCX,** and **LIST.DOCX.**
3. Delete the **Next Page** section break at the top of the document. (***Hint**: Press **[Ctrl+Home]** to go to the top of the document. Display the formatting marks and then, select and delete the **Next Page** section break. Turn off the formatting marks.*)
4. Save the file to the student data folder as **SHOWCASE_L3.DOCX.**
5. Collapse, then expand the subdocuments.
6. In the master document, go to the **DIRECTIONS TO THE SHOWCASE** subdocument and change **three** to **four** in step 4.
7. Open the **DIRECTN.DOCX** subdocument; notice that the text in step 4 has been updated.
8. Switch back to the **SHOWCASE_L3.DOCX** and go to the top of the document.
9. Place the insertion point before the word **Morning** in the first subdocument and insert a split.
10. Lock the new subdocument and then, use the subdocument icon to open the document.
11. Close all open documents without saving them.

Lesson 7 - Creating a Table of Contents

In this section, you will learn how to:

- Use a table of contents
- Creating a Table of Contents
- Using Custom Styles
- Updating a Table of Contents
- Using Outline Levels

Using a Table of Contents

Concepts

Many long documents (such as manuals, reports, books, and theses) include a table of contents to help readers find information. A table of contents lists the topics and subtopics in the document and usually includes the starting page number of each.

A table of contents also makes it easier to navigate a long document on screen. Each heading in the table of contents is a hyperlink to the actual source text in the document. Holding **[Ctrl]** as you click any heading automatically takes you to that heading in the document.

Creating a Table of Contents

Steps

open **PACK13.DOCX**.
Generate a table of contents.

1. Position the insertion point where you want the table of contents to be inserted. *The insertion point is placed in the desired location.*	Press **[Ctrl+Home]**, if necessary
2. Select the **References** tab on the **Ribbon**. *The **References** tab is displayed.*	Click **References**
3. Select the **Table of Contents** button from the **Table of Contents** group. *The **Table of Contents** gallery opens.*	Click 
4. Select the required Table of Contents style. *The Table of Contents based on the selected style is inserted in document.*	Click **Automatic Table 1**

Point to the **Benefits of Worldwide Sporting Goods** heading in the table of contents and hold **[Ctrl]**; notice that the mouse pointer changes into a pointing hand. Click the **Benefits of Worldwide Sporting Goods** heading; Word goes to the corresponding document text.

Using Custom Styles

Steps

Open **PACK14.DOCX**.
Use custom styles to generate a table of contents.

Go to page 3 and click in the **Product Features** heading. Display the **Styles** task pane by clicking the launcher arrow in the **Styles** group on the **Home** tab. Notice that the user-defined **Features** style has been applied to the heading. Close the **Styles** task pane and return to the top of the document.

1. Position the insertion point where you want the table of contents to be inserted. *The insertion point is placed in the desired location.*	Click **[Ctrl+Home]**, if necessary
2. Select the **References** tab. *The **References** tab is displayed.*	Click **References**
3. Select the **Table of Contents** button in the **Table of Contents** group. *The **Table of Contents** gallery is displayed.*	Click 
4. Select **Insert Table of Contents.** *The Table of Contents dialog box opens and the Table of Contents page is displayed.*	Click **Insert Table of Contents**
5. Select **Options.** *The Table of Contents Options dialog box opens.*	Click 
6. Select the **Styles** option. *The **Styles** option is selected.*	Click ☐ **Styles**, if necessary to select it
7. Under **TOC level**, select the box to the right of the style you want to include in the table of contents. *The insertion point is placed in the desired **TOC level** box.*	Click in the box to the right of **Features**
8. Type the desired table of contents level (from **1** to **9**) for the corresponding style. *The number is entered in the **TOC level** box.*	Type ***3***
9. Select the number in the **TOC level** box to the right of a style you want to remove from the table of contents. *The number is selected accordingly.*	Double-click in the **Heading 3** box

10. Press **[Delete]**. *The number is deleted and the heading style is deselected.*	Press **[Delete]**
11. Select **OK**. *The Table of Contents Options dialog box closes.*	Click OK
12. Select **OK**. *The Table of Contents dialog box closes and the table of contents is inserted.*	Click OK

Updating a Table of Contents

Steps

Update a table of contents.

Position the insertion point in the blank line above the **Worldwide Sporting Goods...** text on the **CUSTOMER INFORMATION** page (page 2) and press **[Ctrl+Enter]** to insert a page break. Press **[Ctrl+Home]** to move to the top of the document.

1. Select the **References** tab on the **Ribbon**. *The **References** tab is displayed.*	Click **References**
2. Select the **Update Table** button in the **Table of Contents** group. *The Update Table of Contents dialog box opens.*	Click Update Table
3. Select the desired update option. *The update option is selected.*	Click ○ **Update page numbers only**, if necessary
4. Select **OK**. *The Update Table of Contents dialog box closes and the page numbers in the table of contents are updated.*	Click OK

Notice that the page numbers in the table of contents have changed, beginning with the **PRODUCTS DISTRIBUTED BY WORLDWIDE SPORTING GOODS** line.
Close **PACK14.DOCX**.

Using Outline Levels

Steps

open **OUTTOC.DOCX**.

Use outline levels to generate a table of contents.

Go to page 3.

1. Select the text you want to include in the table of contents. *The text is selected.*	Click in the selection bar to the left of the **Delivery** text
2. Select the **View** tab on the **Ribbon**. *The **View** tab is displayed.*	Click **View**
3. Select the **Outline** button in the **Document Views** group. *The document view changes to outline and the **Outlining** tab is displayed on the **Ribbon**.*	Click Outline
4. Select the **Outline Level** list. *The **Outline Level** list is displayed.*	Click the **Outline Level** list
5. Select the desired outline level. *The level is assigned to the text.*	Click **Level 3**
6. Assign outline levels to additional text as desired. *The outline levels are assigned accordingly.*	Follow the instructions shown below the table before continuing on to the next step
7. Position the insertion point where you want the table of contents to be inserted. *The insertion point is placed in the desired location.*	Press **[Ctrl+Home]**
8. Select the **References** tab. *The **References** tab is displayed.*	Click **References**
9. Select the **Table of Contents** button in the **Table of Contents** group. *The **Table of Contents** gallery opens.*	Click Table of Contents
10. Select **Insert Table of Contents**. *The Table of Contents dialog box opens.*	Click **Insert Table of Contents**
11. Under the **General** section, select the **Formats** list. *A list of available formats is displayed.*	Click **Formats**
12. Select the desired table of contents format. *The selected format is displayed in the **Print Preview** and **Web Preview** boxes.*	Click **Classic**
13. Select the **Tab leader** list. *A list of available tab leaders is displayed.*	Click **Tab leader**

14. Select the desired tab leader. *The selected tab leader is displayed in the **Tab leader** box.*	Click ..... (second option)
15. Select **Options**. *The Table of Contents Options dialog box opens.*	Click Options...
16. Select the **Outline levels** option, if necessary. *The **Outline levels** option is selected.*	Click **Outline levels**, if necessary to select it
17. Select **OK**. *The Table of Contents Options dialog box closes.*	Click OK
18. Select **OK**. *The Table of Contents dialog box closes and the table of contents is inserted in the document.*	Click OK

Mark the following additional table of contents entries found on page 3.

Document text	Table of contents level
Payment	3
Minimum Order	3
Returns	3
Prices	3
Breakage and Loss	3
Cancellation	3

Return to the table and continue on to the next step (step 7).

Use the **Shortcut Views** buttons on the status bar to return to **Print Layout** view. Notice that the table of contents has been applied with the specified entries, levels and formatting. Close **OUTTOC.DOCX**.

Exercise - Creating a Table of Contents

Create and update a table of contents.

1. Open **MANUAL6.DOCX**.
2. Position the insertion point at the start of the document.
3. Create a table of contents using the **Distinctive** format and **3** levels. Then, generate the table of contents.
4. Open **WORDPROC.DOCX**.
5. Select and copy the entire **WORDPROC.DOCX** document.
6. Switch to **MANUAL6.DOCX**. Scroll as necessary, position the insertion point on the line above the **Naming New Documents** heading and paste the copied text.
7. Update the entire table of contents, not just the page numbers.
8. Close both documents without saving them.

Lesson 8 - Creating an Index

In this section, you will learn how to:

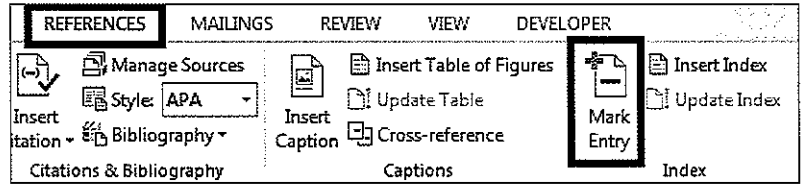
- Use an index
- Create main index entries
- Create index subentries
- Type index entries
- Cross-reference index entries
- Generate an index
- Update an index

Using an Index

Concepts

An index is an alphabetical listing of subjects included in a document, book, or report, including the page numbers on which the references can be found.

An index usually appears at the end of the document. Word can create an index with up to three levels, which means that each index entry can have one level of subtopics and each subtopic in the second level can have one additional level of subtopics. In addition, you can create cross-references to other index entries. A cross-reference refers the reader to a different topic.

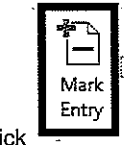


Creating Main Index Entries

Steps

open **PACK16.DOCX.**
Create main entries for an index.

If necessary, go to the top of the document.

1. Select the text you want to mark as an index entry. *The text is selected.*	Click in the selection bar to the left of the **Sporting Equipment** text
2. Select the **References** tab on the **Ribbon.** *The **References** tab is displayed.*	Click **References**
3. Select the **Mark Entry** button in the **Index** group. *The Mark Index Entry dialog box opens with the selected text in the **Main entry** box.*	Click 

4. Select **Mark** or **Mark All** as desired. *The **{XE}** field code that marks the index entry is inserted into the document and the formatting marks are displayed.*	Click Mark
5. Select **Close**. *The Mark Index Entry dialog box closes.*	Click Close

Practice the Concept: Mark **Clothing** on page 1 as a main index entry. Leave the Mark Index Entry dialog box open.

Mark the following index entries by selecting each entry, clicking in the Mark Index Entry dialog box to activate it, and selecting the appropriate **Mark** command.

Mark the **Supplies** and **Memorabilia** headings on page 1 as main index entries. Select the word **Features** (in the **Product Features** heading) on page 2 and select the **Mark All** button to mark all occurrences of the word in the document.

Close the Mark Index Entry dialog box.

Hide the formatting marks.

Creating Index Subentries

Steps

Create index subentries.

If necessary, go to the top of the document and display the **References** tab on the **Ribbon**.

1. Select the text you want to mark as the main index entry. *The text is highlighted as you drag.*	Drag to select the **Products Distributed** text in the **Products Distributed by Worldwide Sporting Goods** heading
2. Release the mouse button. *The text is selected.*	Release the mouse button
3. Select the **Mark Entry** button in the **Index** group. *The Mark Index Entry dialog box opens with the selected text in the **Main entry** box.*	Click Mark Entry
4. Select the **Subentry** box. *The insertion point is placed in the **Subentry** box.*	Press **[Tab]**

5. Type the desired subentry text. *The text is entered in the **Subentry** box.*	Type ***Equipment***
6. Select **Mark** or **Mark All** as desired. *The **{XE}** field code for the index entry is inserted in the document.*	Click Mark
7. Create additional subentries as desired. *An **{XE}** field code is inserted into the document for each subentry.*	Follow the instructions shown below the table before continuing on to the next step
8. Select **Close.** *The Mark Index Entry dialog box closes.*	Click Close

Click to the right of the existing main index entry after each of the following three headings: **Clothing**, **Supplies**, and **Memorabilia**. Create index subentries; typing **Products Distributed** as the main entry for each and the corresponding heading as the subentry.

Return to the table and continue on to the next step (step 8).

Notice that each subentry appears in a separate **{XE}** field and includes the main entry.

Typing Index Entries

Steps

Type an index entry.

If necessary, go to the top of the document and display the **References** tab on the **Ribbon**.

1. Position the insertion point where you want to insert an index entry. *The insertion point is placed in the desired location.*	Scroll as necessary and click in the blank line above the **Clothing** heading
2. Select the **Mark Entry** button in the **Index** group. *The Mark Index Entry dialog box opens with the insertion point in the **Main entry** box.*	Click Mark Entry
3. Type the desired text. *The text is entered in the **Main entry** box.*	Type ***Apparel***
4. Select **Mark** or **Mark All** as desired. *The **{XE}** field code is inserted into the document at the insertion point and formatting marks are displayed.*	Click Mark

5. Select **Close**. *The Mark Index Entry dialog box closes.*	Click Close

Cross-referencing Index Entries

Steps

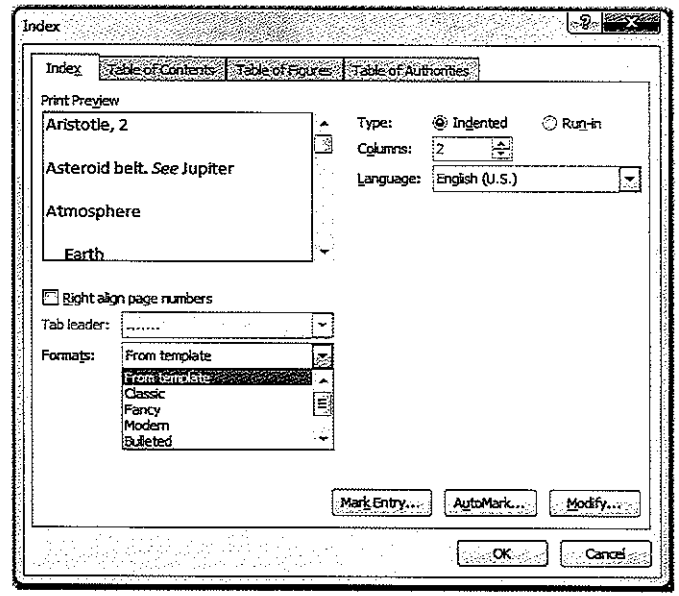
Cross-reference index entries.

If necessary, go to the top of the document and display the **References** tab on the **Ribbon**.

1. Select the text you want to cross-reference. *The text is highlighted as you drag.*	Scroll as necessary and drag to select the **limited warranty** text in the second line of the first paragraph under **Sporting Equipment**
2. Release the mouse button. *The text is selected.*	Release the mouse button
3. Select the **Mark Entry** button in the **Index** group. *The Mark Index Entry dialog box opens with the selected text in the **Main entry** box.*	Click Mark Entry
4. Select the **Cross-reference** option. *The **Cross-reference** option is selected and the insertion point is placed in the **Cross-reference** box after the word **See**.*	Click ◎ **Cross-reference**
5. Type the text to which you want to cross-reference the selected text. *The text is entered in the **Cross-reference** box.*	Type ***Returns***
6. Select **Mark**. *The **{XE}** field code is placed at the insertion point in the document.*	Click Mark
7. Select **Close** *The Mark Index Entry dialog box closes.*	Click Close

Practice the Concept: On page 4, select the **Returns** heading and create a cross-reference to the **limited warranty** text; italicize the cross-reference entry. You can italicize the text in the Mark Index Entry dialog box or, in the document.

Generating an Index



Steps

Generate an index.

If necessary, display the **References** tab on the **Ribbon**.

1. Position the insertion point where you want the index to be placed in the document. *The insertion point is placed in the desired location.*	Press **[Ctrl+End]**
2. Select the **Insert Index** button in the **Index** group. *The Index dialog box opens.*	Click Insert Index
3. Under **Type**, select the desired type of index. *The option is selected.*	Click ○ **Indented**, if necessary
4. Enter the number of columns you want to appear in the index in the **Columns** spin box. *The number of columns is displayed in the **Columns** spin box.*	Click **Columns** ▲▼ to **2**, if necessary

5. Select the **Formats** list. *A list of available formats is displayed.*	Click **Formats**
6. Select the desired format. *The format is previewed in the **Print Preview** box.*	Scroll as necessary and click **Formal**
7. Select the **Right align page numbers** option, if desired. *The **Right align page numbers** option is selected.*	Click **Right align page numbers**, if necessary
8. Select the **Tab leader** list. *A list of available tab leaders is displayed.*	Click **Tab leader**
9. Select the desired tab leader. *The tab leader is displayed in the **Tab leader** box.*	Click ..... (second option), if necessary
10. Select **OK**. *The Index dialog box closes and the index is entered at the insertion point.*	Click OK

Hide the formatting marks and switch to **Print Layout** view to view the index, if necessary.

Updating an Index

Steps

Update an index.

Position the insertion point before the **Service Features** heading on page 2 and press **[Ctrl+Enter]** to insert a page break. Then, go to the end of the document and scroll to view all of the index.

1. Position the insertion point in the index. *The insertion point is placed in the desired location.*	Click anywhere in the index text
2. Select the **Update Index** button in the **Index** group on the **References** tab. *The index is updated.*	Click Update Index

Notice that the page numbers in the index change to reflect the inserted page break.
Close **PACK16.DOCX**.

Exercise - Creating An Index

Create index entries, generate and update an index.

1. Open **INDEX6.DOCX**.
2. Mark the **Creating a Document** heading as a main index entry.
3. Mark the **Naming the Document** heading as a subentry of **Creating a Document**.
4. Go to page 3, mark the **Modify Document Defaults** text at the top of the page as a main index entry. Do not include the text **Screen**.
5. On page 3, mark the **Allow Widows and Orphans**, **Automatic Page Breaks**, and **Backup Before Edit Document** headings as subentries of the text **Modify Document Defaults**. Mark them as main index entries as well.
6. Position the insertion point in the line above the **Backup Before Edit Document** heading and enter a main index entry of **Saving a File Copy**. Cross-reference the **Saving a File Copy** entry to **Backup Before Edit Document** and then, mark the entry.
7. Close the Mark Index Entry dialog box.
8. Press **[Ctrl+End]** to go to the end of the document.
9. Generate a **Modern**, two column index at the insertion point. Right align the page numbers and select a tab leader of your choice.
10. Go to page 1 and select the word **filename** in the first paragraph below the **Naming the Document** heading. Mark all occurrences of **filename** as a main index entry.
11. Press **[Ctrl+End]** to go to the end of the document, then update the index.
12. Close the document without saving it.

Lesson 9 -
Using Bookmarks, Captions and Footnotes

In this section, you will learn how to:

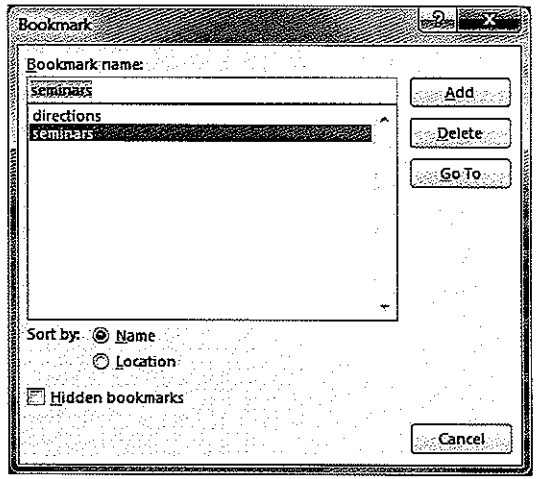
- Work with bookmarks
- Creating Bookmarks
- Viewing Bookmarks
- Going to a Bookmark
- Cross-referencing to a Bookmark
- Deleting a Bookmark
- Inserting a Caption
- Inserting a Table of Figures
- Inserting a Cross-reference
- Inserting Footnotes
- Setting Note Options
- Viewing Notes

Working with Bookmarks

Concepts

When you are working in a long document, it can be helpful to mark specific locations in the document so that you can go back to those locations at a later time. You can use bookmarks to mark a location in a document or to mark selected text, graphics, tables, and other objects.

Bookmarks can also be used to create cross-references or mark a range of pages for an index entry.



Creating Bookmarks

Steps

open **PACK17.DOCX**.
Create a bookmark.

Go to page 5 of the document.

1. Select the item to which you want to add a bookmark. *The text is highlighted as you drag.*	Drag to select the **Fitness Equipment** heading
2. Release the mouse button. *The text is selected.*	Release the mouse button

3. Select the **Insert** tab on the **Ribbon.** *The **Insert** tab is displayed.*	Click **Insert**
4. Select the **Bookmark** button in the **Links** group. *The Bookmark dialog box opens with the insertion point in the **Bookmark name** box.*	Click 
5. Type the desired bookmark name. *The text is entered in the **Bookmark name** box.*	Type ***fitness***
6. Select the **Add** button. *The Bookmark dialog box closes and the bookmark is saved.*	Click 

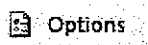
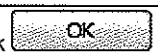
Practice the Concept: Go to page 4, select the **Minimum Order** text and create a bookmark named **order.**

Go to page 3, select the **Advertising Agreement** text and create a bookmark named **advertising**. Click anywhere in the document to deselect the text.

Viewing Bookmarks

Steps

View bookmarks.

1. Select the **File** tab *The **Backstage** view opens*	Click **File**
2. Select **Options**. *The Word Options dialog box opens.*	Click 
3. Select **Advanced**. *The **Advanced** options are displayed on the right-hand side of the dialog box.*	Click **Advanced**
4. Under **Show document content**, select the **Show bookmarks** option. *The **Show Bookmarks** option is selected.*	Click **Show bookmarks**
5. Select **OK**. *The Word Options dialog box closes and the bookmarks are displayed in the document.*	Click 

Scroll as necessary to view the bookmarks on pages 3, 4, and 5.

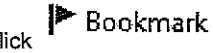
Open the Word Options dialog box again and deselect the **Show Bookmarks** option.

Going to a Bookmark

Steps

Go to a bookmark.

If necessary, go to the top of the document. Press **[Ctrl+Home]**.

1. Select the **Insert** tab on the **Ribbon.** *The **Insert** tab is displayed.*	Click **Insert**, if necessary
2. Select the **Bookmark** button in the **Links** group. *The Bookmark dialog box opens.*	Click 
3. Select the desired bookmark from the **Bookmark name** list box. *The bookmark is displayed in the **Bookmark name** box.*	Click **order**
4. Select **Go To.** *The bookmarked text is selected in the document.*	Click 
5. Select **Close.** *The Bookmark dialog box closes.*	Click 

Practice the Concept: Open the Bookmark dialog box, go to the **fitness** bookmark, and then to the **advertising** bookmark without closing the Bookmark dialog box. Then, close the Bookmark dialog box.

Cross-referencing to a Bookmark

Steps

Cross-reference to a bookmark.

If necessary, go to the top of the document. Press **[Ctrl+Home]**.

1. Position the insertion point where you want to create a cross-reference. *The insertion point is placed in the desired location.*	Click at the end of the third paragraph under the **Sporting Equipment** heading
2. Type introductory text for the cross-reference, if desired. *The text is inserted at the insertion point.*	Type ***For specific items, see***

3. Select the **Insert** tab on the **Ribbon.** *The **Insert** tab is displayed.*	Click **Insert**, if necessary
4. Select the **Cross-reference** button in the **Links** group. *The Cross-reference dialog box opens.*	Click Cross-reference
5. Select the **Reference type** list. *A list of available reference types is displayed.*	Click **Reference type**
6. Select **Bookmark.** ***Bookmark** is displayed in the **Reference type** box and all bookmarks defined in the document are displayed in the **For which bookmark** list box.*	Click **Bookmark**
7. Select the **Insert reference to** list. *A list of available options appears.*	Click **Insert reference to**
8. Select the desired option. *The option is displayed in the **Insert reference to** box.*	Click **Bookmark text**
9. Select **Insert as hyperlink.** *The **Insert as hyperlink** option is selected.*	Click **Insert as hyperlink**, if necessary
10. Select the bookmark you want to include in the cross-reference from the **For which bookmark** list box. *The bookmark is selected.*	Click **fitness**
11. Select **Insert.** *The bookmarked text is inserted in the document as a cross-reference.*	Click Insert
12. Select **Close.** *The Cross-reference dialog box closes.*	Click Close

Add spaces and punctuation as necessary to the cross-reference in the document. Then, press **[Ctrl]** and click the cross-reference to go to the cross-referenced text.

Deleting a Bookmark

Steps

Delete a bookmark.

1. Select the **Insert** tab on the **Ribbon.** *The **Insert** tab is displayed.*	Click **Insert**, if necessary

2. Select the **Bookmark** button in the **Links** group. *The Bookmark dialog box opens.*	Click Bookmark
3. Select the bookmark you want to delete. *The bookmark is selected.*	Click **advertising**
4. Select **Delete.** *The bookmark is deleted from the **Bookmark name** list box and removed from the document.*	Click Delete
5. Select **Close.** *The Bookmark dialog box closes.*	Click Close

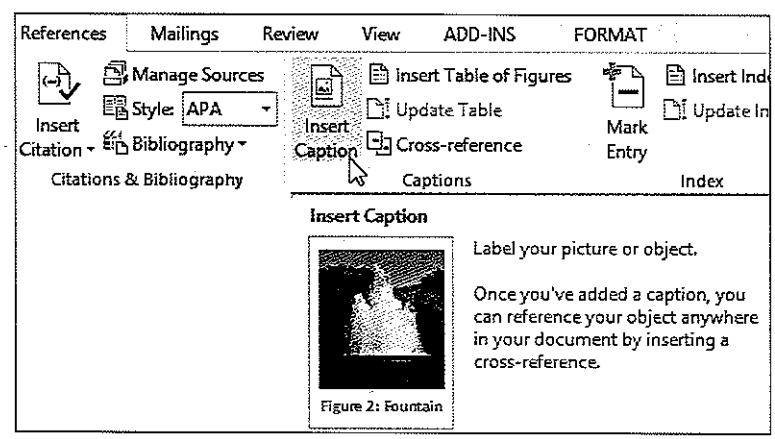
Close **PACK17.DOCX.**

Inserting a Caption

Concepts

If you have created a document that contains images as well as text, you may want to add captions to those images in order to describe or explain them. A caption is text linked specifically to an image which, is separate from the main text of the document. They are often used to provide extra information and to help the reader correctly identify or interpret the image.

You can also caption tables, equations, and other items using the same method.



Steps

open **CAPTION.DOCX.**
Insert a caption.

1. Select the item to which you want to add a caption. *The image is selected and selection handles appear around the image. The **Format** contextual tab is added to the **Ribbon**.*	Click the first image on the first page
2. Select the **References** tab on the **Ribbon**. *The **References** tab is displayed.*	Click **References**
3. Select the **Insert Caption** button in the **Captions** group. *The Caption dialog box opens. The insertion point is placed after the default label in the **Caption** box.*	Select **Insert Caption**
4. Type the desired caption, including any punctuation to appear after the label. *The caption is entered.*	Type ***: Soccer is growing in popularity.*** (including the colon and the period)
5. Select **OK**. *The caption is created and inserted below the image.*	Click OK

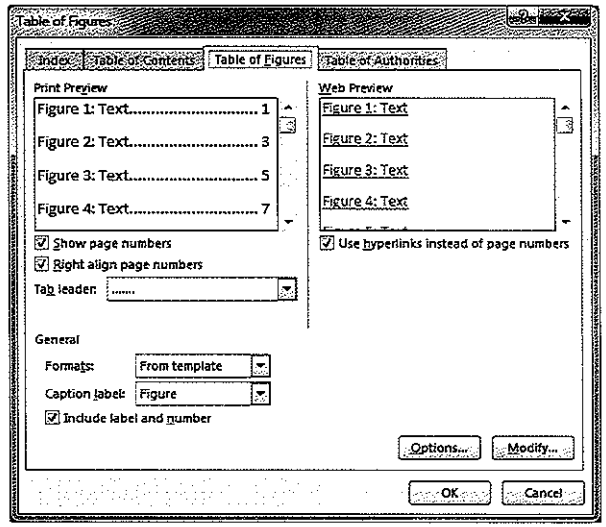
Practice the Concept: Scroll down and select the second image on the page. Then, select the **Insert Caption** button. Note that Word has automatically assigned the label **Figure 2**. Type ***: Baseball is always a winner.***, then click **OK**.

Inserting a Table of Figures

Concepts

After you have added captions to your document, you can create a table of figures. When you build a table of figures, Microsoft Word searches for the captions, sorts them by number, and displays them in the document.

A Table of Figures can be useful for creating a proper appendix of figures or tables within more formal documentation. It can be handy to have a list of all the images used in a document either for publication or just for 'in-house' use during writing.



Steps

Insert a Table of Figures.

To create a paragraph in which to insert the Table of Figures, click just before the **Worldwide Goods** title, and press **[Enter]**.

1. Position the insertion point where you want to insert the Table of Figures. *The insertion point appears in the desired location.*	Press **[Ctrl+Home]**, if necessary
2. Select the **References** tab. *The **References** tab is displayed.*	Click **References**
3. Select the **Insert Table of Figures** button in the **Captions** group. *The Table of Figures dialog box opens.*	Select **Insert Table of Figures**
4. Select **OK**. *The Table of Figures is inserted in the document.*	Click OK

Type the heading ***Table of Figures*** just above the table.

Inserting a Cross-reference

Concepts

Cross-referencing lets you insert a reference to another item in your document, such as a specific page, a heading, a subheading, a figure or, a table. The reference works as a hyperlink, so that a reader viewing the document electronically can go to the item referred to directly. The hyperlink in the reference will automatically update if the item is moved within the document or the page numbering changes.

Steps

Insert a cross-reference.

Scroll down to page 3 of the document.

1. Position the insertion point where you want to insert the cross-reference. *The insertion point is placed in the desired location.*	Click after the text **cooperative advertising agreements** in list item 7
2. Select the **References** tab on the **Ribbon**. *The **References** tab is displayed.*	Click **References**
3. Select the **Cross-reference** button in the **Captions** group. *The Cross-reference dialog box opens.*	 Select Cross-reference
4. Select the **Reference type** list. *The **Reference type** list is displayed.*	Click the **Reference type** 
5. Select the desired **Reference Type**. *The **Insert reference to** and **For which [type]** boxes are updated based on the selected **Reference Type**.*	Click **Bookmark**
6. Select the specific item you want to refer to in the **For which [type]** box. *The item is selected.*	Click **Advertising**, if necessary
7. Select the **Insert reference to** list. *The **Insert reference to** list is displayed.*	Click the **Insert reference to** 
8. Select the required text for the reference (e.g. **Entire caption**, **Heading text** or **Page number**, as appropriate). *The required text is selected.*	Click **Page number**

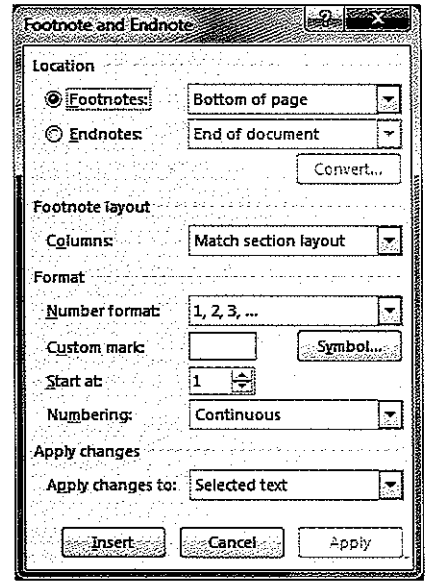
9. Select **Insert**. *The cross-reference is inserted in the document as a page number.*	Click Insert
10. Select **Close**. *The Cross-reference dialog box closes.*	Click Close
11. Type appropriate text before and/or after the cross-reference. *The cross-reference is presented as desired.*	Type - ***see page*** before the reference link

Point to the cross-reference. Press **[Ctrl]** and click at the same time to follow the link.
Close **CAPTION.DOCX**.

Inserting Footnotes

Concepts

You can use footnotes and endnotes in documents to explain, comment on, or provide references to something they've mentioned in a document. Footnotes typically appear at the end of each page, whereas endnotes appear at the end of the document. Footnotes and endnotes consist of two linked parts – the note reference mark and the corresponding note text.



Steps

open **PACK18.DOCX**.
Insert a note.

Switch to **Draft** view using the **View Shortcuts** button on the status bar.

1. Position the insertion point in the text to which you want to add a note. *The insertion point is placed in the desired location.*	Click after **warranty**, at the end of the first paragraph under the **Sporting Equipment** heading
2. Select the **References** tab on the **Ribbon**. *The **References** tab is displayed.*	Click **References**
3. Select the **Footnotes** launcher arrow. *The Footnote and Endnote dialog box opens.*	Click in the **Footnotes** group
4. Under **Location**, select the desired type of note. *The **Footnotes** option is selected.*	Click **Footnotes**, if necessary
5. Select the **Numbering** list under **Format**. *A list of available options is displayed.*	Click **Numbering**
6. Select the desired option. *The appropriate option is selected.*	Click **Continuous**
7. Select **Insert**. *The Footnote and Endnote dialog box closes. The note reference mark is placed at the insertion point and the **Footnotes** pane opens.*	Click Insert
8. Enter the desired note text. *The note text is entered in the **Footnotes** pane.*	Type ***See specific item warranty for details.***
9. Select the **Close** button in the **Footnotes** pane. *The **Footnotes** pane closes.*	Click

Practice the Concept: Go to page 3 and click at the end of the **Item 2 Initial advertising budget**. Open the Footnote and Endnote dialog box to insert the following endnote: **This agreement will be reviewed after six months to determine whether adjustments are necessary.**.

Go to page 6 and click at the end of the **Exercise Bikes** heading. Open the Footnote and Endnote dialog box to insert the following footnote: **Manufacturer's extended warranty is 60 days.**. Then, close the **Footnotes** pane.

Preview the document in the Backstage view. Scroll the document to view the footnotes at the bottom of pages 1 and 6 and the endnote on page 7.

Setting Note Options

Steps

Set note options.

1. Select the **References** tab on the **Ribbon**. *The **References** tab is displayed.*	Click **References**, if necessary
2. Select the launcher arrow in the **Footnotes** group. *The Footnote and Endnote dialog box opens.*	Click in the **Footnotes** group
3. Under **Location**, select the desired type of note. *The **Endnotes** option is selected.*	Click **Endnotes**, if necessary
5. Select the corresponding notes list. *A list of available options is displayed.*	Click **Endnotes**
6. Select the desired option. *The option is selected.*	Click **End of document**
7. Select the **Number format** list. *A list of available number formats is displayed.*	Click **Number format**
8. Select the desired number format. *The number format is selected.*	Click **A, B, C,**
9. Select **Apply**. *The Footnote and Endnote dialog box closes and the note options are saved.*	Click Apply

Go to page 3 in the document. Notice that the endnote at the end of the **Item 2** paragraph uses the letter **A** as the note reference mark.

Viewing Notes

Steps

Go to page 1 and if necessary, switch to **Draft** view using the **View Shortcuts** buttons on the status bar.

1. Point to the note reference mark in the document text to view the note text in a ScreenTip. *The note text is displayed in a ScreenTip.*	Point and click to the **1** note reference mark

2. Click **Show Notes** from the Reference tab, Footnotes group.	Click **Show Notes**

Switch to **Draft** view. Select the **Show Notes** button in the **Footnotes** group to open the View Footnotes dialog box. Then, select the **View footnote area** option, if necessary and click **OK**. Notice that the Footnotes pane opens. In footnote **2**, change **60 days** to **90 days** and then, close the Footnotes pane. Point to the footnote **2** note reference mark in the document to view the changed note text in the ScreenTip.

Exercise - Using Bookmarks, Captions And Footnotes



Inserting Captions and Bookmarks

1. Open **CAPTIONEX.DOCX**.
2. Select the first image on the right of page 1.
3. Add a caption and type **- Meet world renowned figure skaters** in the **Caption** box.
4. Change the **Numbering** format to uppercase letters and then, click **OK**.
5. Insert the caption.
6. Open **INVITE61.DOCX**.
7. Create bookmarks for the following items:

Item	Page	Bookmark Name
Directions to the Showcase	2	**directions**
Seminars and Demonstrations	3	**seminars**
EXERCISE BIKES	4	**bikes**
ROWING MACHINES	4	**rowers**
STEPPERS	4	**steppers**
TREADMILLS	5	**treadmills**

8. Select the **Show bookmarks** option on the **Advanced** page in the Word Options dialog box.
9. Use the **directions** bookmark to go to the **Directions to the Showcase** text.
10. Go to the top of the document. Position the insertion point at the end of the second paragraph and type: **See**.
11. Create a hyperlinked cross-reference to the **seminars** bookmark. Close the Cross-reference dialog box. Add spacing and punctuation as necessary. Press **[Ctrl]** and click the cross-reference to jump to the cross-referenced text.
12. Delete the **bikes** and **treadmills** bookmarks.

Lesson 10 - Using Mail Merge

In this section, you will learn how to:

- Work with Mail Merge
- Start Mail Merge
- Identify the main document
- Create a Recipient list
- Customize columns in a Recipient list
- Rearrange columns in a Recipient list
- Save a Recipient list
- Enter records into a Recipient list
- Sort records to be merged
- Highlight merge fields
- Insert merge fields into a document
- Preview merged data
- Merge to a new document
- Merge to the printer

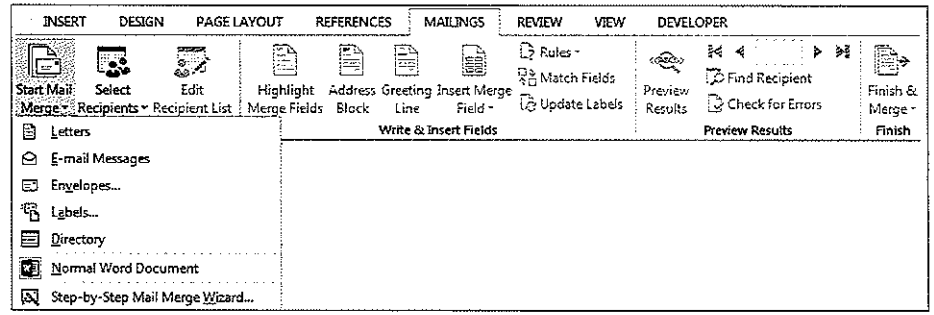
Working with Mail Merge

word / excell / access / outlook

desktop outl
not
web outlook

Concepts

Mail merge is often used to send out the same or similar letters to a large number of recipients. For example, when we send emails to hundreds of our clients, the contents are same but the addresses are different. At that time, we can use mail merge in Word to start the process. Mail merge enables you to write one letter only and then merge the letter with a data source, thereby creating customized, individual letters including information specific to each recipient (such as, names, addresses and other details). The end result is a professional-looking letter that is tailored to each recipient.



Starting Mail Merge

Steps

open **CANCUN1.DOCX**.

Note: The steps in this lesson are specific to merging an existing letter with a new data source. With the guidance provided by the **Mail Merge** task pane, however, you will be able to apply what you learn in this lesson to other circumstances, whether you are working with a new main document, an existing data source, or any combination of such files.

1. Select the **Mailings** tab. *The **Mailings** tab is displayed.*	Click **Mailings**
2. Select the **Start Mail Merge** button in the **Start Mail Merge** group. *The **Start Mail Merge** menu opens.*	Click 
3. Select Step by Step Mail Merge Wizard. *The **Mail Merge** task pane opens.*	Click **Step by Step Mail Merge Wizard**

Identifying the Main Document

Steps

Identify the main document.

1. Under **Select document type**, select the desired document type. *A document type is selected.*	Click **Letters**, if necessary
2. Under **Step 1 of 6**, select the **Next: Starting document** link. ***Step 2 of 6** is displayed in the **Mail Merge** task pane.*	Click **Next: Starting document**
3. Under **Select starting document**, select the desired main document. *The **Use the current document** option is selected.*	Click **Use the current document**, if necessary

Creating a Recipient List

Steps

Create a data source or recipient list.

1. Under **Step 2 of 6**, select the **Next: Select recipients** link. ***Step 3 of 6** is displayed in the **Mail Merge** task pane.*	Click **Next: Select recipients**
2. Under **Select recipients**, select the **Type a new list** option. ***Type a new list** is selected and the task pane displays the corresponding options.*	Click **Type a new list**
3. Under **Type a new list**, select the **Create** link button. *The New Address List dialog box opens, with the insertion point in the **Title** box.*	Click Create...

Leave the New Address List dialog box open.

Customizing Columns in a Recipient List

Steps

Customize the columns in a recipient list.

1. Select the **Customize Columns** button in the New Address List dialog box. *The Customize Address List dialog box opens with the first Field Name selected.*	Click Customize Columns...
2. Select **Add**. *The Add Field dialog box opens with the insertion point in the **Type a name for your field** box.*	Click Add...
3. Type the desired field name in the **Type a name for your field** box. *The field name is displayed in the **Type a name for your field** box.*	Type ***Region***
4. Select **OK**. *The Add Field dialog box closes. The new Field Name is displayed below the first Field Name in the **Field Names** list.*	Click OK
5. Select the field you want to remove from the **Field Names** list. *The field is selected.*	Click **Company Name**
6. Select **Delete**. *A Microsoft Office Word message box opens asking you to confirm the deletion.*	Click Delete
7. Select **Yes**. *The Microsoft Office Word message box closes and the field is deleted from the **Field Names** list.*	Click Yes

Practice the Concept: Add another field called **Qtr Sales**. Remove the following Field Names: **Home Phone** and **Work Phone**.

Select the **Country or Region** field and click **Rename**. Change the Field Name to **Country** then click **OK**.

Leave the Customize Address List dialog box open.

Rearranging Columns in a Recipient List

Steps

Rearrange fields in a recipient list.

1. Select the field you want to move. *The Field Name is selected.*	Click **Region**
2. Select **Move Up** or **Move Down** as desired. *The field moves up or down the **Field Names** list accordingly.*	Click [Move Down] twice (to below the **Last Name** field)

Practice the Concept: Move the **Qtr Sales** field below the **Country** field. Move the **E-mail Address** field above the **Qtr Sales** field.

Leave the Customize Address List dialog box open.

Saving a Recipient List

Steps

Save a recipient list.

1. Once you have finished customizing the recipient list fields, select **OK**. *The Customize Address List dialog box closes. The New Address List dialog box displays the columns arranged according to the customization.*	Click [OK]
2. Select **OK**. *The New Address List dialog box closes. The Save Address List dialog box opens with the insertion point in the **File name** box.*	Click [OK]
3. Type the desired file name in the **File name** box. *The text is displayed in the **File name** box.*	Type ***sales1***
4. Select **Save**. *The Save Address List dialog box closes. The Mail Merge Recipients dialog box is displayed.*	Click [Save]

Leave the Mail Merge Recipients dialog box open.

Entering Records into a Recipient List

Steps

Enter records into a recipient list.

1. Double-click the data source file name in the **Data Source** list of the Mail Merge Recipients dialog box. *The Edit Data Source dialog box is displayed with the insertion point in the first field.*	Double-click **SALES1.MDB**
2. Type the desired information into the first field. *The text is displayed in the first field.*	Type ***Ms.***
3. Press **[Tab]**. *The insertion point moves to the next field in the first record.*	Press **[Tab]**
4. Enter information as desired into the remaining fields of the record. *The information is displayed in the data fields.*	Follow the instructions shown below the table before continuing on to the next step
5. To add another record, select the **New Entry** button. *A new, blank data record is displayed.*	Click [New Entry]
6. Enter information as desired into additional records. *The information is entered into the new records.*	Follow the instructions shown below the table before continuing on to the next step
7. When you have entered all the desired records, select **OK**. *A Microsoft Office Word message box opens asking you to confirm that you want to update your recipient list and save the changes to the data source file.*	Click [OK]
8. Confirm the action as appropriate. Select **Yes** to confirm saving the changes to the data source. *The Microsoft Office Word message box and Edit Data Source dialog box close. The records are displayed in the Mail Merge Recipients dialog box.*	Click [Yes]
9. Select **OK**. *The Mail Merge Recipients dialog box closes. The main document and Mail Merge task pane are displayed.*	Click [OK]

Complete the first record with the information shown in the following table, leaving the **Address Line 2** field blank. Since you have created separate city, state, and ZIP code fields, you do not need to type a comma after the city name.

Field	Record 1
Title	Ms.
First Name	Elaine
Last Name	Chua
Region	Central
Address Line 1	Sims Avenue
Address Line 2	
City	Singapore
State	Singapore
ZIP Code	08734
Country	Singapore
Qtr Sales	23,445

Return to the table and continue on to the next step (step 5).

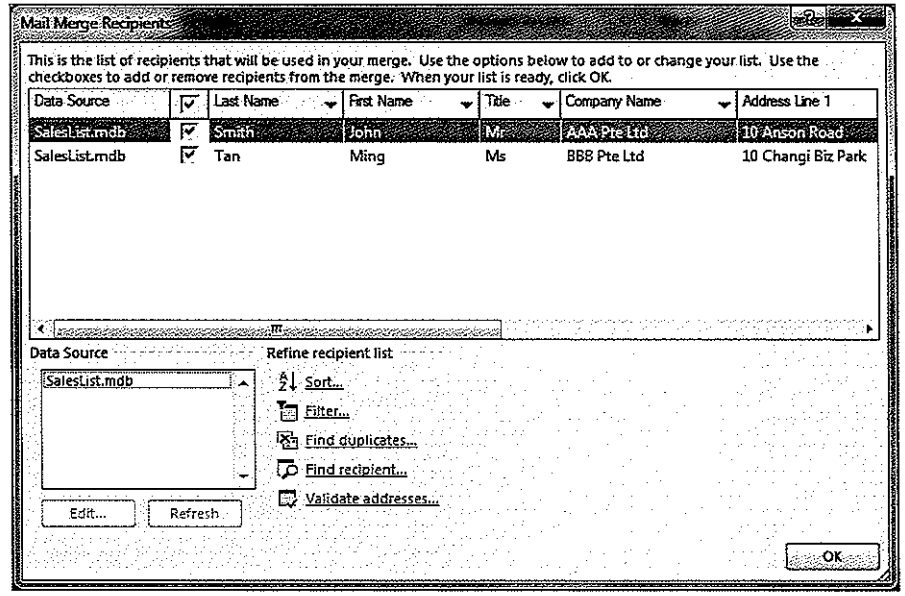
Add the following two records to the data source. Do not create a new entry after adding **Record 3**.

Field	Record 2	Record 3
Title	Mr.	Ms.
First Name	Frank	Jackie
Last Name	Lim	Smith
Region	West Coast	East Coast
Address Line 1	10, West Coast Road	102 Dove Road
Address Line 2		
City	Singapore	Singapore
State	Singapore	Singapore
Zip Code	18888	09999
Country	Singapore	Singapore
Qtr Sales	28,450	32,295

Return to the table and continue on to the next step (step 7).

Notice that the file name of the saved data source now displays under **Use an existing list** in the **Mail Merge** task pane.

Sorting Records to be Merged



Steps

Sort records to be merged.

1. Select the **Edit recipient list** link under **Use an existing list** in the **Mail Merge** task pane. *The Mail Merge Recipients dialog box opens.*	Click Edit recipient list...
2. Select the column heading of the field by which you want to sort. *The records are sorted by the selected field in ascending order.*	Scroll as necessary and click the **State** column heading
3. Select the **Sort** link. *The Filter and Sort dialog box opens with the **Sort Records** page displayed.*	Click Sort...
4. Select the **Sort by** list. *A list of available fields is displayed.*	Click **Sort by**
5. Select the field by which you want to sort. *The field name displays in the **Sort by** box.*	Click **Last Name**

6. Select the desired sort order. *The sort order is selected.*	Click **Ascending**, if necessary
7. To sort by additional fields, select one or both **Then by** lists, and select the desired fields and sort orders. *The field names are displayed in the **Then by** boxes and the sort orders are selected.*	Follow the instructions shown below the table before continuing on to the next step
8. Select **OK**. *The Filter and Sort dialog box closes and the records are sorted accordingly.*	Click OK
9. Select **OK**. *The Mail Merge Recipients dialog box closes.*	Click OK

Set the following sort options:

Sort	Field	Order
Then by	First Name	Ascending
Then by	Region	Ascending

Return to the table and continue on to the next step (step 8).

Highlighting Merge Fields

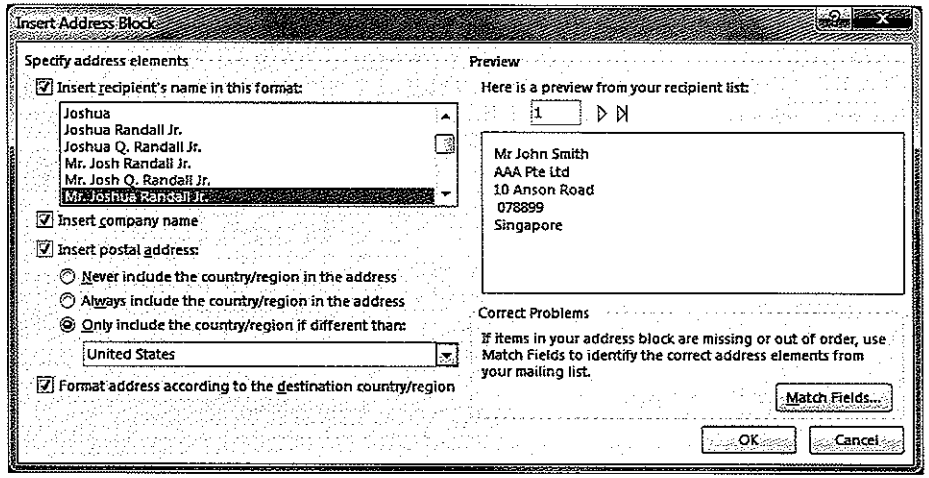
Steps

Set document display options for merging.

1. Select the **File** tab *The **Backstage** view opens*	Click **File**
2. Select the **Options** button. *The Word Options dialog box opens.*	Click Options
3. Select **Advanced**. *The **Advanced** page displays.*	Click **Advanced**
4. Scroll down to the **Show document content** section. *The **Show document content** options are displayed*	Scroll down to **Show document content**
5. Deselect the **Show field codes instead of their values** option. *The **Show field codes instead of their values** option is deselected.*	Click **Show field codes instead of their values** to deselect it, if necessary

6. Select the **Field shading** list. *A list of available options is displayed.*	Click **Field shading**
7. Select the **Always** option. *The **Always** option is displayed in the **Field shading** box.*	Click **Always**
8. Select **OK**. *The Word Options dialog box closes and the document display options are set.*	Click OK

Inserting Merge Fields into a Document



Steps

Insert merge fields into a document.

1. Under **Step 3 of 6**, select the **Next: Write your letter** link. ***Step 4 of 6 is** displayed in the **Mail Merge** task pane.*	Click **Next: Write your letter**
2. Position the insertion point in the main document where you want to insert a grouped merge field. *The insertion point moves to the new location.*	Press **[Ctrl+Home]**, if necessary

3. Under **Write your letter**, select the link for the grouped merge field you want to insert. *The Insert Address Block dialog box opens.*	Click Address block...
4. Select or deselect the desired options. *The options are selected or deselected accordingly and a preview of the first address in your recipient list is displayed on the right.*	Click **Mr. Josh Randall Jr.** in the **Insert recipient's name in this format** list
5. To preview other addresses from your recipient list, use the arrows above the Preview box. *Other addresses are displayed accordingly.*	Click twice
6. Select **OK**. *The Insert Address Block dialog box closes. The grouped merge field is inserted into the main document at the insertion point.*	Click OK
7. Position the insertion point where you want to insert an individual merge field. *The insertion point moves to the new location.*	Click after the **Region:** text
8. Under **Write your letter**, select the **More items...** link. *The Insert Merge Field dialog box opens.*	Click More items...
9. Select the desired field. *The field is selected.*	Click **Region**
10. Select **Insert**. *The merge field is inserted into the main document at the insertion point.*	Click Insert
11. Select **Close**. *The Insert Merge Field dialog box closes.*	Click Close

Practice the Concept: Use the **Greeting line...** link in the **Mail Merge** task pane to insert **Mr. Randall,** on the second line below **Region**. ***(Hint:** Set the first list box to **(none).**)* To preview other Greeting lines from your recipient list, use the arrows above the Preview box.

Finally, insert the **Qtr Sales** field after the dollar sign in the fourth line of the letter body. Close the Insert Merge Field dialog box.

Previewing Merged Data

Steps

Preview the merged document.

1. Under **Step 4 of 6**, select the **Next: Preview your letters** link. ***Step 5 of 6** is displayed in the **Mail Merge** task pane. The first merged record is previewed in the document window.*	Click **Next: Preview your letters**
2. Under **Preview your letters**, select the **Next Record** button to preview each of the merged records. *The merged records are previewed accordingly.*	Click >> twice
3. Under **Preview your letters**, select the **Previous Record** button to navigate back through the merged records. *The previous merged records are previewed accordingly.*	Click << twice

Merging to a New Document

Steps

Merge to a new document.

1. Under **Step 5 of 6**, select the **Next: Complete the merge** link. ***Step 6 of 6** is displayed in the **Mail Merge** task pane.*	Click **Next: Complete the merge**
2. Under **Merge**, select the **Edit individual letters** link. *The Merge to New Document dialog box opens.*	Click Edit individual letters...
3. Select the records you want to merge to a new document. *The records are selected accordingly.*	Click ◎ **All**, if necessary
4. Select **OK**. *The Merge to New Document dialog box closes. The records are displayed in a new, merged document.*	Click OK

Scroll through the new document to view the merged letters. Then, close the document without saving it.

Merging to the Printer

Steps

Merge to the printer.

1. Under **Merge**, select the **Print** link. *The Merge to Printer dialog box opens.*	Click Print...
2. Select the records you want to merge to the printer. *The records are selected accordingly.*	Click **All**, if necessary
3. Select **OK**. *The Merge to Printer dialog box closes and the Print dialog box opens.*	Click OK
4. Select the desired options in the Print dialog box, then select **OK**. *The Print dialog box closes, and Word prints the merged letters.*	Click OK

Close the **Mail Merge** task pane. Close all open documents without saving them.

Exercise - Using Mail Merge

Use mail merge to send a letter to a list of recipients.

1. Open **INTRVW1.DOCX** and display the formatting marks, if necessary.
2. Deselect the **Show field codes instead of their values** option and set **Field shading** to **Always**, if necessary. *(**Hint:** Go to **Word Options** in the **File tab**, then select the **Advanced** page.)*
3. Begin the mail merge by opening the **Mail Merge** task pane.
4. Create a letter to send to a group of people using the current document.
5. Create a new list of recipients. Customize the data source by removing the following fields: **Company Name**, **Address Line 2**, **Home Phone**, **Work Phone**, and **E-mail Address, State**.
6. Add the following fields to the data source: **Appt Date** and **Appt Time**. Move the **Appt Date** field below the **Last Name** field then, move the **Appt Time** field below the **Appt Date** field.
7. Save the data source as **prosp1**.
8. Add the following data records:

Addressee	Appointment Date	Appointment Time
Mr. John Smith 305 Windsor Drive Singapore 19107 Singapore	October 1	9:30 AM
Ms. June Jones 654 Fifth Avenue Singapore 19406 Singapore	October 3	10:00 AM
Mr. George Yeo 777 King Edwards Road Singapore 19108 Singapore	October 4	9:45 AM

9. Use the Mail Merge Recipients dialog box to sort the records in ascending order by **Last Name**.
10. Insert the **Address block** grouped merge field on the second line below the date. Use any recipient name format that includes the title, and format the addresses to include the destination country or region.
11. Insert the **Greeting line** grouped merge field on the second line below the **Address block** field. Use the **Title** and **Last Name** format.

12. Insert the **Appt Date** field after the word **on** then, insert the **Appt Time** field after the word **at**, in the third line of the first paragraph below the **GreetingLine** field.
13. Preview the merged letters.
14. Merge all records to a new document. Review the merged document and then, close it without saving.
15. Close all open documents without saving them.

Lesson 11 - Linking/Embedding Objects

In this section, you will learn how to:

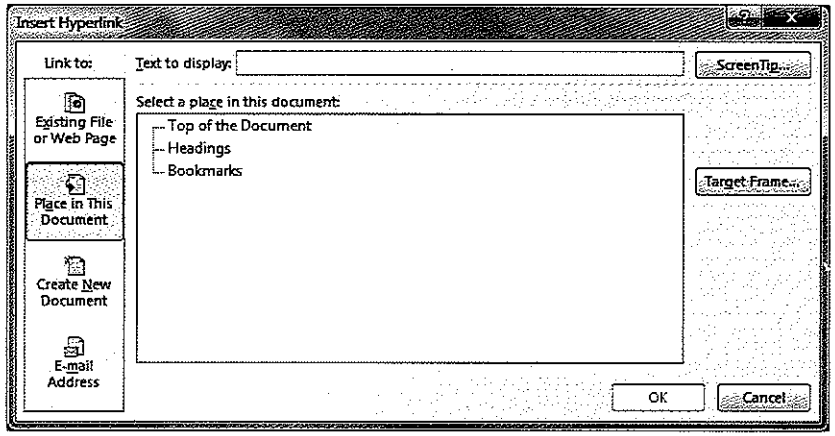
- Inserting a Hyperlink
- Display a Linked Object as an Icon
- Embed Data as an Object
- Updating a Link
- Breaking a Link

Inserting a Hyperlink

Concepts

You may need to insert hyperlinks in your Word document to add a web address or email address that you can then use by just clicking.

We can insert a hyperlink for a picture or text within your document. All hyperlinks have two parts, one part is the name and the other part is the address. The name shows in your own document and the address opens the other website or user Gmail.



Steps

open **WSGINFO.DOCX**.
Inserting a Hyperlink

If necessary, scroll to view the **Products & Services** paragraph.

1. Select the text you want to link. *The text is selected.*	Highlight **Catalog**
2. Select the **Insert** tab. *The **Insert** tab is displayed.*	Click **Insert**
3. Select the **Hyperlink** button in the **Links** group. *The Insert Hyperlink dialog box opens.*	Click Hyperlink
4. Under **Link to**, select **Existing File or Web Page**. *The **Existing File or Web Page** page opens.*	Click **Existing File or Web Page**, if necessary

5. Select the **Look in** list. *A list of available drives opens.*	Click **Look in**
6. Select the drive containing the file to which you want to link. *A list of available folders and files opens.*	Click the student data drive
7. Select the folder containing the file to which you want to link. *A list of available files opens.*	Click the student data folder
8. Select the file to which you want to link. *The file is selected, and the file name appears in the **Address** box.*	Scroll as necessary and click **CATALOG**
9. Select **OK**. *The Insert Hyperlink dialog box closes, and the selected text is formatted as a hyperlink.*	Click OK

Point to the **Catalog** link. Notice that a ScreenTip displays the path and file name of the link, as well as instructions on how to access it. Hold **[Ctrl]** and notice that the pointer changes into a pointing hand when you point to the link.

Display a Linked Object as an Icon

Concepts

Embedded objects are documents or other files you have inserted into this document. Instead of having separate files, sometimes it's easier to keep them all embedded in a document.

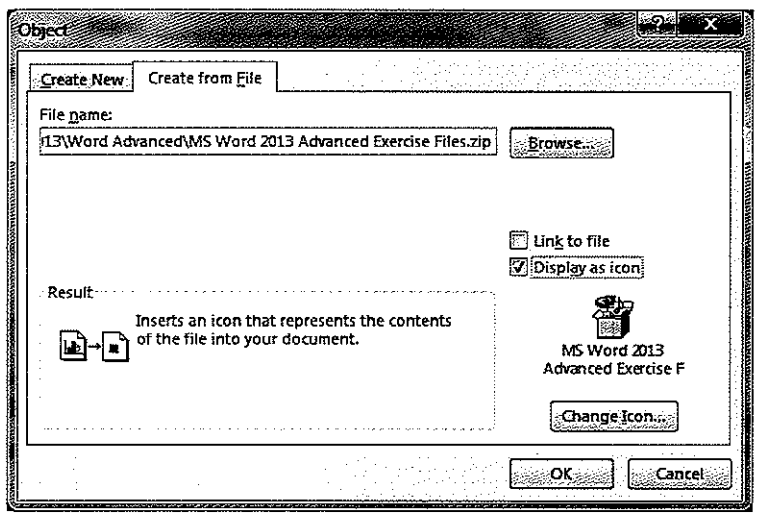
Steps

Displaying a Linked object as an icon.
Open **WSGINFO.DOCX**

1. Select the location in the document where you want to insert the link object.	Select the blank line below the text **Catalog.**
2. Select the **Insert** tab. *The **Insert** tab is displayed.*	Click **Insert**, if necessary
3. Select the **Object** button in the **Text** group. *The Insert Object dialog box is displayed.*	Click **Object**
4. Select the Create from file tab *The options are displayed.*	Click **Create from File**
5. Select the Browse button and navigate to the student data directory. *The Browse dialog box is displayed.*	Click **Browse.**

6. Select the file you want to insert. *The file to be inserted is selected.*	Scroll as necessary and click **CATALOG**
7. Select the Link to file and Display as icon options. *The additional options are selected.*	Click **Link to file** and **Display as icon.**
8. Select **OK**. *The dialog box closes and the link to the file is inserted as an Icon.*	Click OK

Embed Data as an Object



Steps

Embedding data as an object.

1. Select the location in the document where you want to insert the link object.	Select the blank line below the text that begins with **We specialize in fitness equipment...**
2. Select the **Insert** tab. *The **Insert** tab is displayed.*	Click **Insert**, if necessary
3. Select the **Object** button in the **Text** group. *The Insert Object dialog box is displayed.*	Click Object

4. Select the Create from file tab *The options are displayed.*	Click **Create from File**
5. Select the Browse button and navigate to the student data directory. *The Browse dialog box is displayed.*	Click **Browse.**
6. Select the file you want to insert. *The file to be inserted is selected.*	Scroll as necessary and click **SALES.xlsx**
7. Select the Link to file check box. *The additional options are selected.*	Click **Link to file**
8. Select **OK**. *The dialog box closes and the document is inserted as a linked object.*	Click OK

Updating a Link

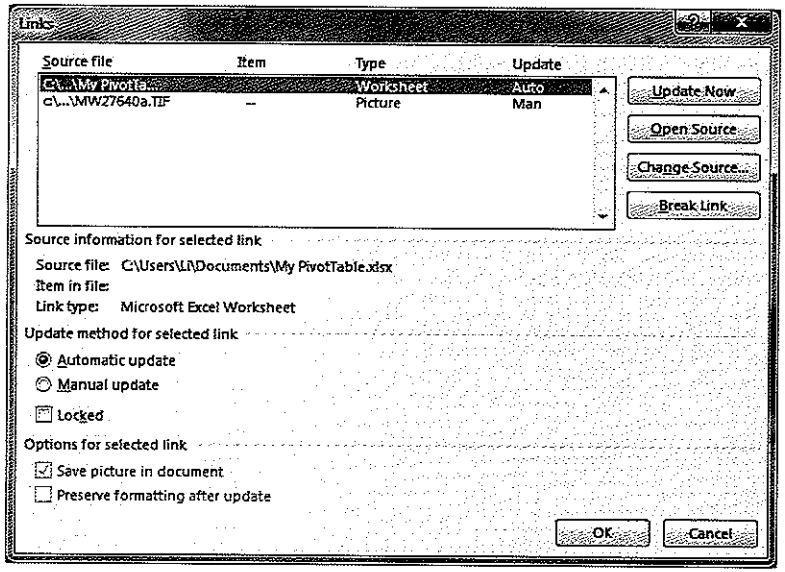
Steps

Update a link.

Switch to the **SALES.xlsx**. Change the suggested retail price in the **North** from **$2000** to **$3000**, then save and close the file.

1. Right-click the link object you want to update. *The link is selected and a shortcut menu opens.*	Right click on the inserted linked object.
2. Select the **Update Link** option from the shortcut menu. *The link is updated with the new information.*	Click **Update Link**

Breaking a Link



Steps

Breaking a link.

1. Right-click the link object you want to update. *The link is selected and a shortcut menu opens.*	Right click on the inserted linked object.
2. Select the **Linked document object** option from the shortcut menu. *The shortcut menu appears.*	Click **Linked worksheet object**
3. Select **Links** from the shortcut menu. *The Links dialog box is displayed.*	Click **Links**.
4. Select the **Break Link** button, click **Yes** to confirm. *The link to the file is removed from the document.*	Click **Break Link** and then click **Yes**.

Lesson 12 - Using Macros

In this section, you will learn how to:

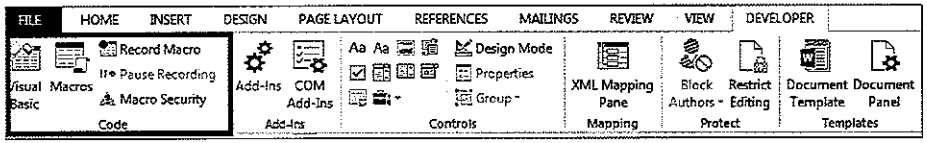
- Record a macro
- Run a macro
- Edit a macro
- Add a macro button to a toolbar
- Delete a macro

Recording a Macro

Concepts

A macro executes a series of previously recorded and saved actions. You can create macros for tasks you perform frequently, especially tasks that involve a lengthy number of steps. Since you can play a macro with relatively few steps, macros can save you time. When you use macros to perform a series of repetitious steps, you can be assured that the task is performed in exactly the same way each time; therefore, macros can ensure consistency and accuracy.

Before you create a macro, it is a good idea to make sure that you know all the steps needed to perform the desired procedure so that you can record the macro properly.



Steps

Open **PHLIST1.DOCX**.

Make sure the **Developer** tab is available on the **Ribbon**.

Select all of the text below the **Regional Sales Representatives** heading.

1. Select the **Developer** tab on the **Ribbon**. *The **Developer** tab is displayed.*	Click **Developer**, if necessary
2. Select the **Record Macro** button in the **Code** group. *The Record Macro dialog box opens with the text in the **Macro name** box selected.*	Click Record Macro
3. Type the desired macro name. *The name is displayed in the **Macro name** box.*	Type ***SortInfo***
4. Select the **Store macro in** list. *A list of available templates and documents is displayed.*	Click **Store macro in**
5. Select the template in which you want to store the macro. *The template name is displayed in the **Store macro in** box.*	Click **All Documents (Normal.dotm)**, if necessary

6. Place the insertion point in the **Description** box. *The insertion point is placed in the **Description** box.*	Click in the **Description** box
7. Type the desired description for the macro. *The text is entered in the **Description** box.*	Type ***Sorts by region in alphabetical order***
8. Select **OK**. *The Record Macro dialog box closes and the mouse pointer changes to a cassette tape. The **Stop Recording** and **Pause Recording** buttons are displayed in the **Code** group on the **Developer** tab. A button is displayed on the status bar to indicate that a macro is currently recording.*	Click OK
9. Perform the steps of the procedure you want to automate. *Each command is recorded by the macro recorder.*	Follow the instructions shown below the table before continuing on to the next step
10. When you have finished recording the macro, select the **Developer** tab on the **Ribbon**. *The **Developer** tab is displayed.*	Click **Developer**
11. Select the **Stop Recording** button in the **Code** group on the **Developer** tab. *The macro recorder stops. The **Record Macro** button displays again and the macro is recorded.*	Click Stop Recording

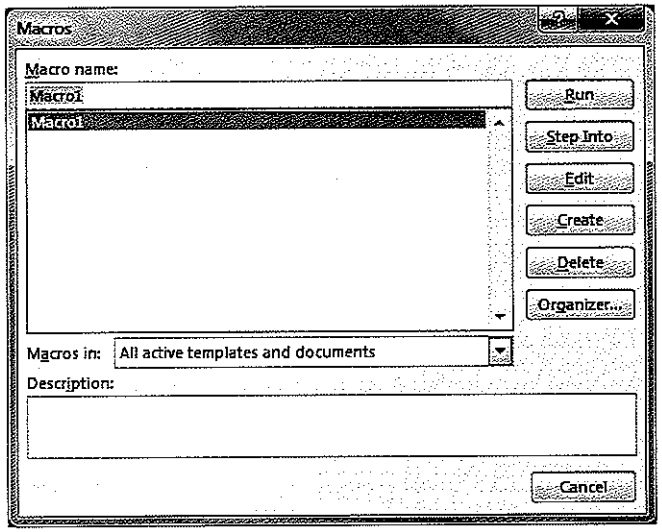
Perform the following steps to create the macro:

Select the **Home** tab then, select the **Sort** button in the **Paragraph** group.
Select the **Header row** option, if necessary.
Select the **Region** option from the **Sort by** list. Then, select the **Text** option from the **Type** list and the **Ascending** option, if necessary.
Select **OK** to close the Sort Text dialog box.
Press the left arrow [←] to deselect the text.

Return to the table and continue on to the next step (step 10).

Notice that the list is now sorted alphabetically by the **Region** column.
Close **PHLIST1.DOCX**.

Running a Macro



Steps

Open **PHLIST2.DOCM**.
Run a macro.

Make sure the **Developer** tab is available on the **Ribbon**.

Select all of the text below the **Regional Sales Representatives** heading. We will now sort this text by running the macro recorded in the last topic.

1. Select the **Developer** tab on the **Ribbon**. *The **Developer** tab is displayed.*	Click **Developer**, if necessary
2. Select the **Macros** button in the **Code** group. *The Macros dialog box opens.*	Click Macros
3. Select the desired macro from the **Macro name** list box. *The macro name is displayed in the **Macro name** box.*	Click **SortInfo**, if necessary
4. Select the **Run** button. *The Macros dialog box closes and the macro runs.*	Click Run

Notice that the list is now sorted alphabetically by the **Region** column.

Adding a Macro Button to the Quick Access Toolbar

Steps

open **LIST2.DOCM**.
Add a macro button to the **Quick Access Toolbar**.

1. Select the **Customize Quick Access Toolbar** button to the right of the **Quick Access Toolbar**. *The **Customize Quick Access Toolbar** menu opens.*	Click
2. Select **More Commands**. *The Word Options dialog box opens with the **Customize** page displayed.*	Click **More Commands**
3. Select the **Choose commands from** list. *A list of available options is displayed.*	Click **Choose commands from**
4. Select **Macros**. *A list of available macros is displayed in the **Commands** list box.*	Click **Macros**
5. Select the desired macro from the **Commands** list box. *The macro name is selected.*	Click **Normal.NewMacros.SortInfo**
6. Select the **Add** button. *The macro is added below the current buttons in the **Customize** list box.*	Click Add >>
7. Select the **Modify** button. *The Modify Button dialog box opens displaying a gallery of available button images.*	Click Modify...
8. Select the desired button image. *The button image is selected.*	Click (third row, seventh column)
9. Select the text in the **Display name** box. *The text in the **Display name** box is selected.*	Triple-click the text **Normal.NewMacros.SortInfo**
10. Type the desired button name. *The text is displayed in the **Display name** box.*	Type ***Sort Last Name***

11. Select **OK**. *The Modify Button dialog box closes. The selected button image and the revised macro name are displayed in the **Customize** list box.*	Click OK
12. Select **OK**. *The Word Options dialog box closes. The new macro button is displayed in the **Quick Access Toolbar**.*	Click OK

Select the entire list including the headings, and use the customized **Quick Access Toolbar** button to run the **Sort Last Name** macro.

Notice that the information is now sorted alphabetically in ascending order by the second column (**Last Name**).

Select the **Customize Quick Access Toolbar** button then, choose **More Commands**. Select the **Reset** button below the **Customize** list box and then, select **Yes** to reset the **Quick Access Toolbar** to its default settings. Click **OK**.

Notice that the customized button has been removed from the **Quick Access Toolbar**.

Saving a Macro Enabled Document

Steps

Save a files as a Macro Enabled document

1. Select the **File** tab *The **Backstage** view opens*	Click **File**
2. Select **Save As**. *A list of options is displayed.*	Click **Save As**
3. Enter a name for the file in the File name box. *The file name is inserted in the File name box.*	Type **AutoList**
4. Select the type of file from the Save as type list.	Select **Word Macro-Enabled** document.
5. Select the **Save** button. *The dialog box closes and the file is saved in the specified format.*	Click **Save**

Close the file.

Deleting a Macro

Steps

open **LIST2.DOCX**.
Delete a macro.

Make sure the **Developer** tab is available on the **Ribbon**.

1. Select the **Developer** tab on the **Ribbon**. *The **Developer** tab is displayed.*	Click **Developer**, if necessary
2. Select the **Macros** button in the **Code** group. *The Macros dialog box opens.*	Click **Macros**
3. Select the macro you want to delete from the **Macro name** list box. *The macro name is displayed in the **Macro name** box.*	Click **SortInfo**, if necessary
4. Select **Delete**. *A Microsoft Office Word warning box opens asking if you want to confirm the deletion.*	Click Delete
5. Select **Yes**. *The Microsoft Office Word warning box closes. The macro is deleted and removed from the **Macro name** list box.*	Click Yes
6. Select **Close**. *The Macros dialog box closes.*	Click Close

Close **LIST2.DOCM**.

Exercise - Using Macros



Work with macros.

1. Open **MACRO.DOCX**.
2. Select the entire list, from the **Quality Products** text through the **Semi-Annual Promotions** text.
3. Record a new macro. In the Record Macro dialog box, name the macro **bullet** and type the following description: **Creates a bulleted list**.
4. To record the macro, perform the following steps:

   Display the **Home** tab. Apply the bullet style of your choice.
   Open the Define New Multilevel List dialog box and increase the **Text indent** to **0.6"**.
5. Complete the macro by clicking the **Stop Recording** button.