

JohnRouda.com presents:

Microsoft® Office Word 2007 Training

Create your first document

Course contents

- Overview: New to Word?
- Lesson: Meet the document

The lesson includes a list of suggested tasks and a set of test questions.

Overview: New to Word?



Do you need to use Word 2007, but you're not quite sure how to get started?

Take this course to learn the basics of creating your first document.

You'll find out how to type where you want to on a page, fix spelling errors, change spacing and page margins, and save your work.

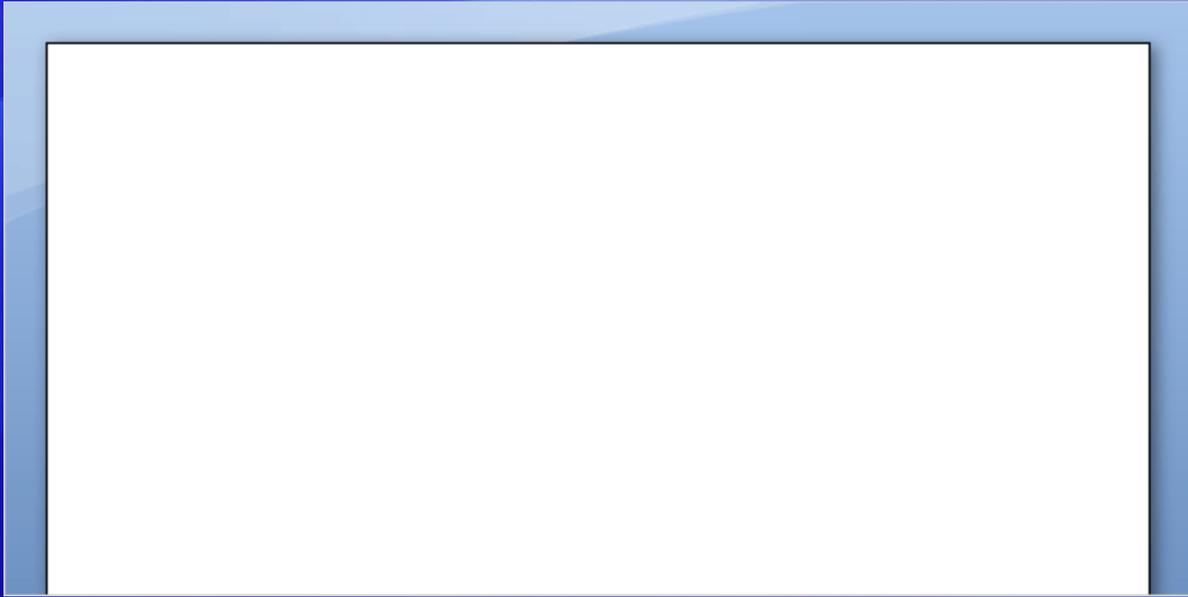
Course goals

- Create and save a document.
- Accept or reject suggested revisions for spelling and grammar as you type.
- Change page margins.
- Adjust spacing by deleting any extra spaces between words or extra lines between paragraphs.

Lesson

Meet the document

Meet the document



When you open Word, you see a **blank document**.

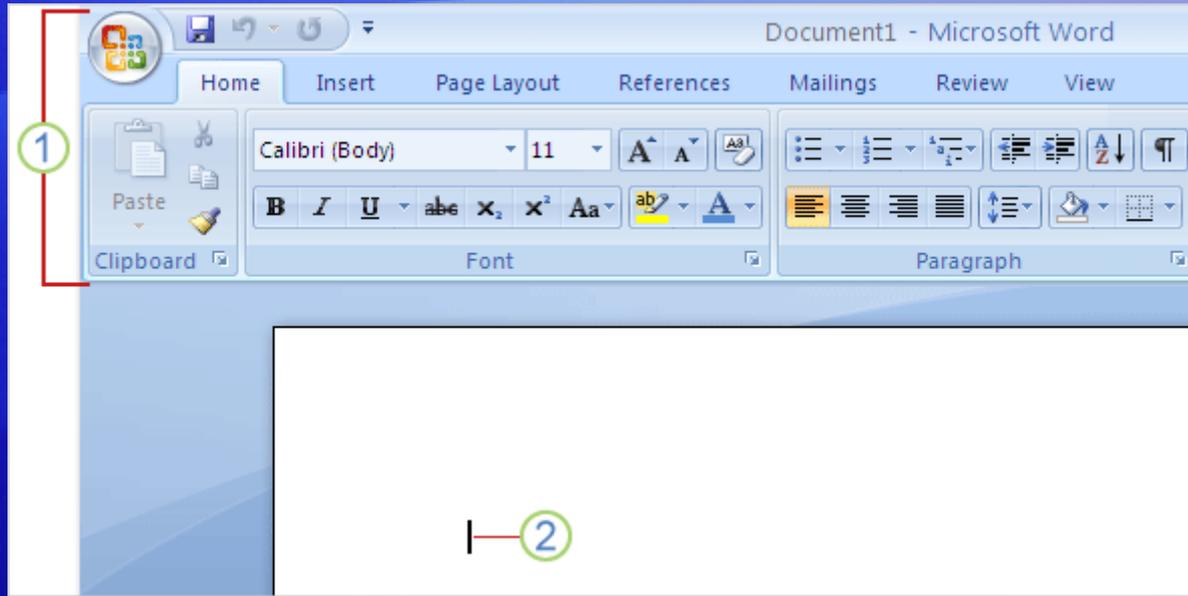
It looks like a sheet of paper and takes up most of the screen space.

You need to get to work, but being new to Word, you may wonder how to get started.

Let's begin by helping you get comfortable with some Word basics.

[Create your first document](#)

Just start typing

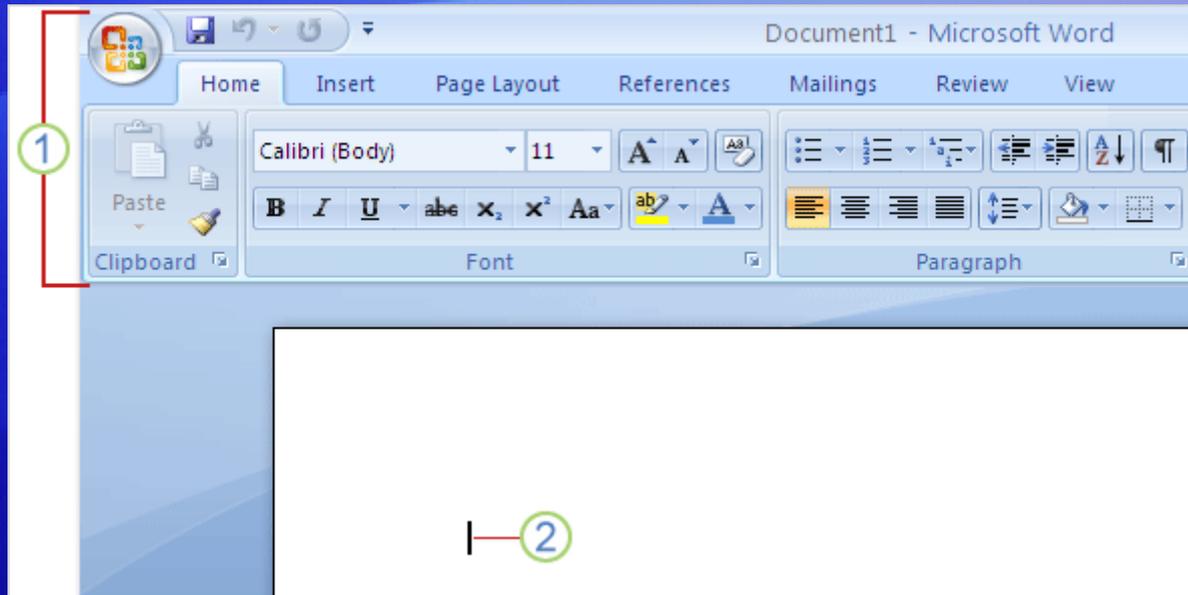


Start with the **Ribbon** and the **cursor**.

- ① Above the document, the Ribbon spans the top of Word. You use buttons and commands on the Ribbon to tell Word what you want to do.
- ② Word waits for you to start typing. The cursor, a blinking vertical line in the upper-left corner of the page, shows where the content you type appears on the page.

Create your first document

Just start typing



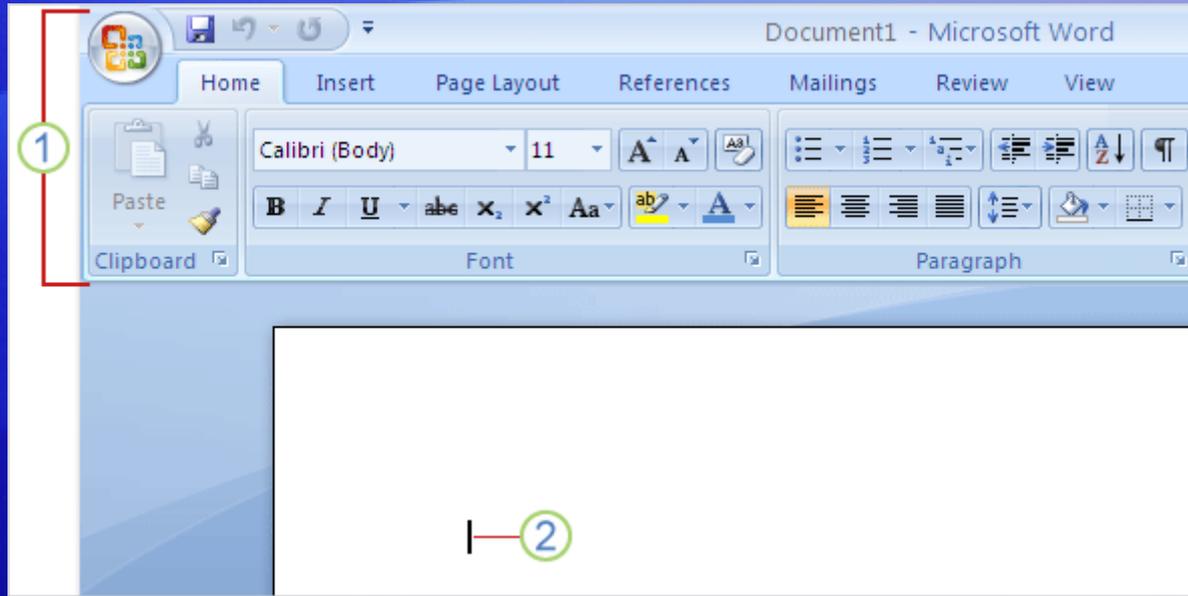
Start with the **Ribbon** and the **cursor**.

If you'd like to start typing further down the page instead of at the top, press the ENTER key on your keyboard until the cursor is where you want to type.

If you want to indent the first line you type, press the TAB key on your keyboard before you start to type. This will move the cursor one-half inch to the right.

Create your first document

Just start typing



Start with the **Ribbon** and the **cursor**.

As you type, the cursor moves to the right. When you get to the end of a line on the right side of the page, just continue to type. Word will move on to the next line for you as you type.

To start a new paragraph, press ENTER.

Create your first document

What's that?

→ Thank you very much for your enquiry about the newest model of Ultra-Wheels skates, the Ultra-Glide. We think you'll be surprised and pleased with Ultra-Glide. ¶

¶ ————— ①

→ ② The Ultra-Glide is designed for the recreational skater who demands the convenience and styling of a three-buckle skate at an affordable price. ¶

③

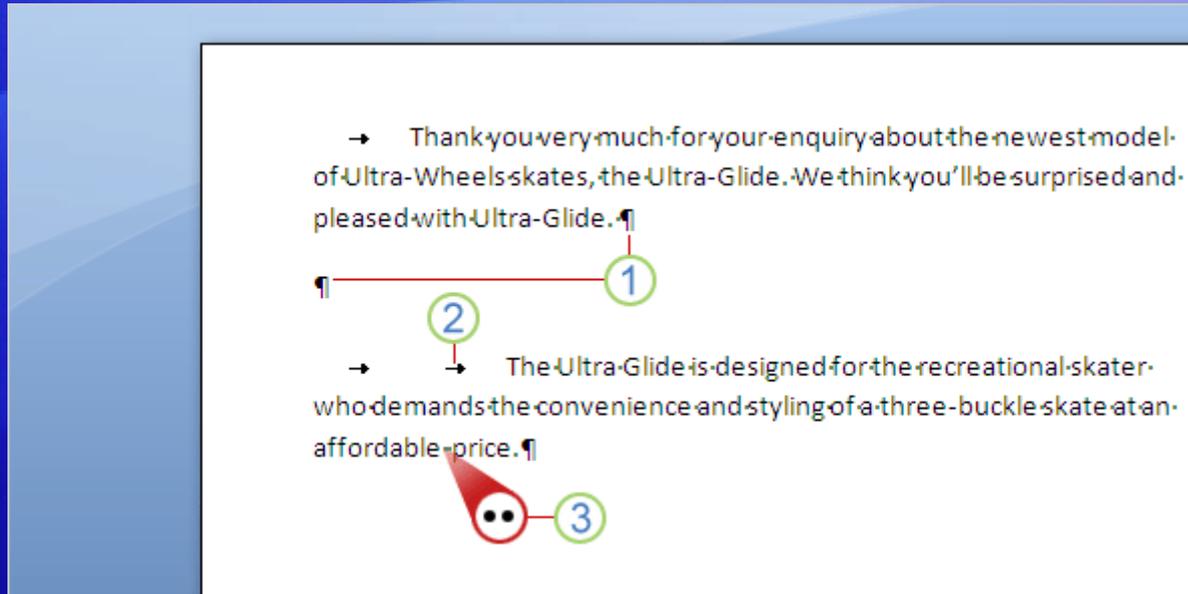
Imagine that you've typed a few paragraphs.

They seem far apart, and the second paragraph starts farther to the right than the first.

You can see what's going on by looking at the formatting marks Word automatically inserts as you type.

These marks are always in documents, but they are invisible until you display them.

What's that?

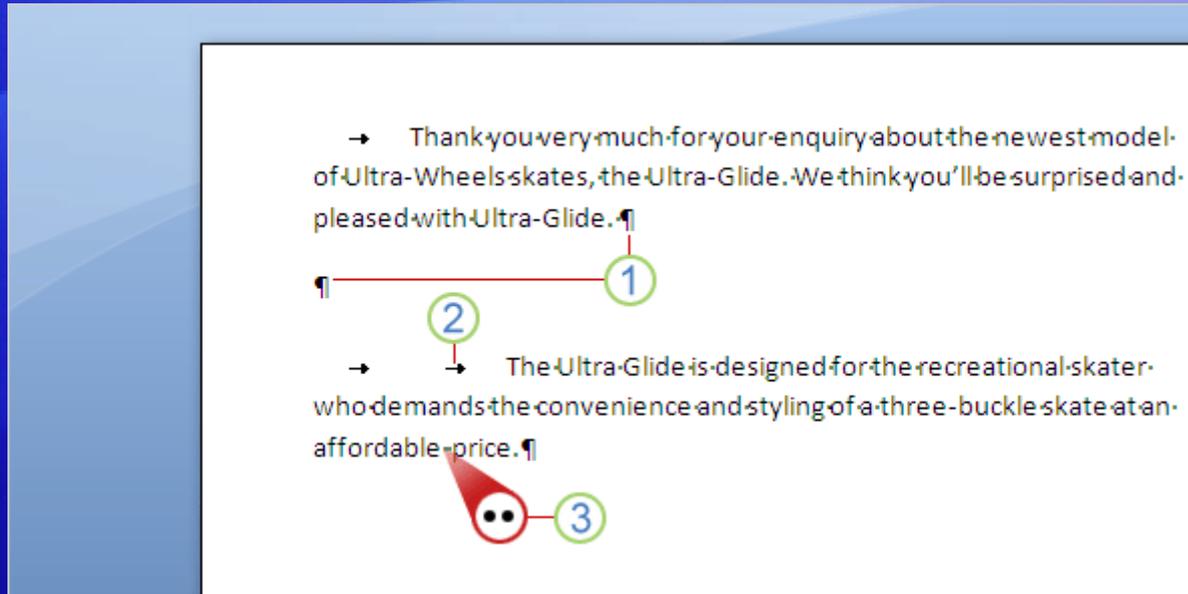


To see formatting marks, use the Ribbon, at the top of the window.

On the **Home** tab, in the **Paragraph** group, click the **Show/Hide** button . Click the button again to hide formatting marks.

These marks aren't just for show. You can get rid of extra spacing by deleting extra marks.

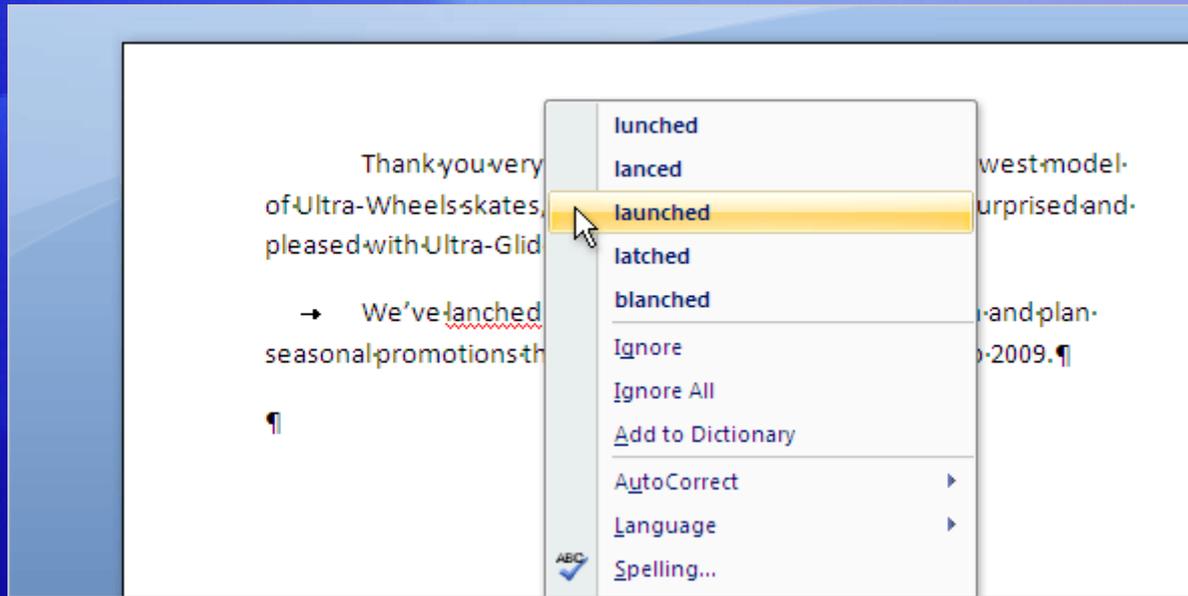
What's that?



So what are formatting marks, and what do they mean? The picture shows a few examples.

- 1 Extra paragraph mark: ENTER was pressed twice.
- 2 Extra tab mark: TAB was pressed twice, making the second paragraph indented more than the first.
- 3 Extra space between words: The SPACEBAR was pressed twice instead of once.

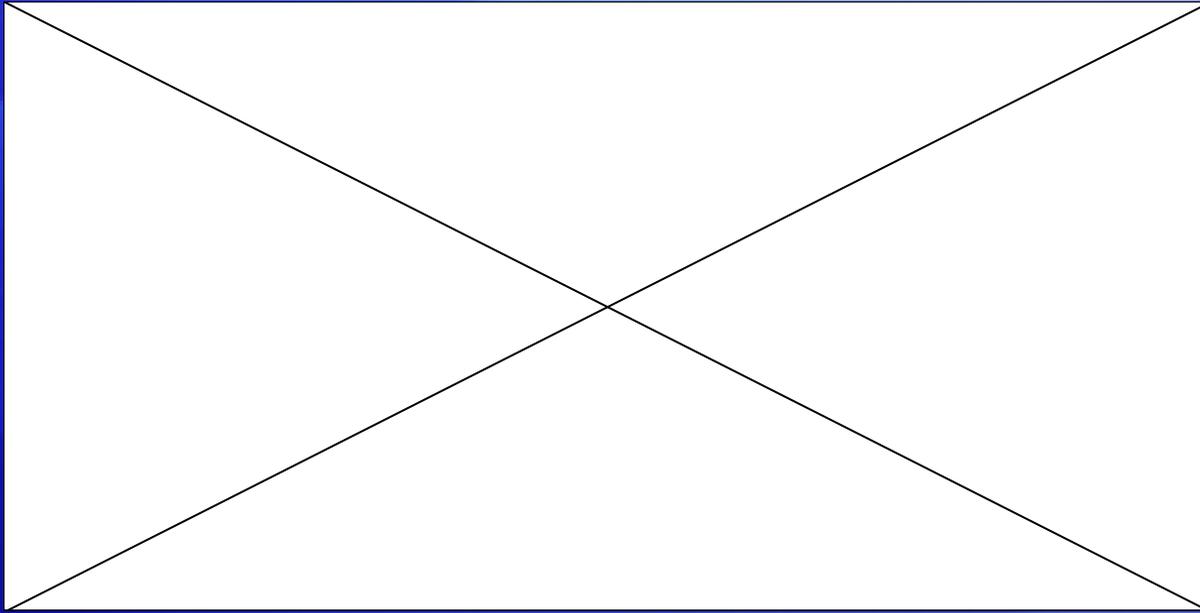
What are those underlines in my document?



As you type, Word might on occasion insert a wavy red, green, or blue underline beneath text.

- **Red:** Indicates either a possible spelling error or that Word doesn't recognize a word, such as a proper name or place.
- **Green:** Word thinks grammar should be revised.
- **Blue:** A word is spelled correctly but does not seem to be the correct word for the sentence.

What are those underlines in my document?

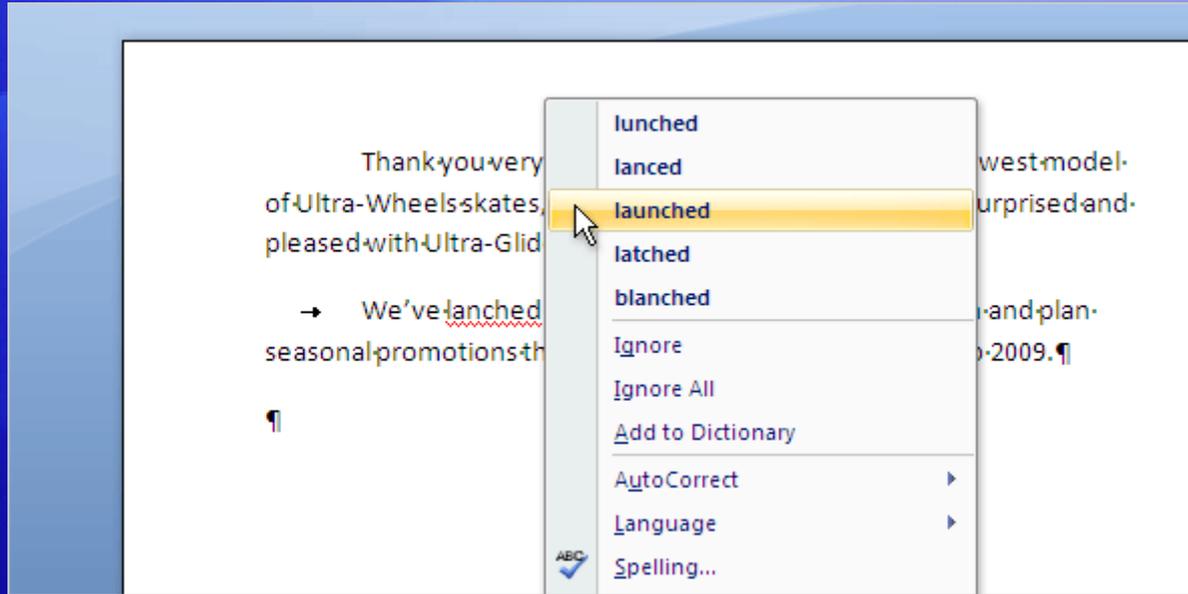


The animation shows what you can do about the wavy underlines.

Animation: Right-click, and click **Play**.

Right-click an underlined word to see suggested revisions (every once in a while Word may not have any alternate spellings). Click a revision to replace the word in the document and get rid of the underlines.

What are those underlines in my document?

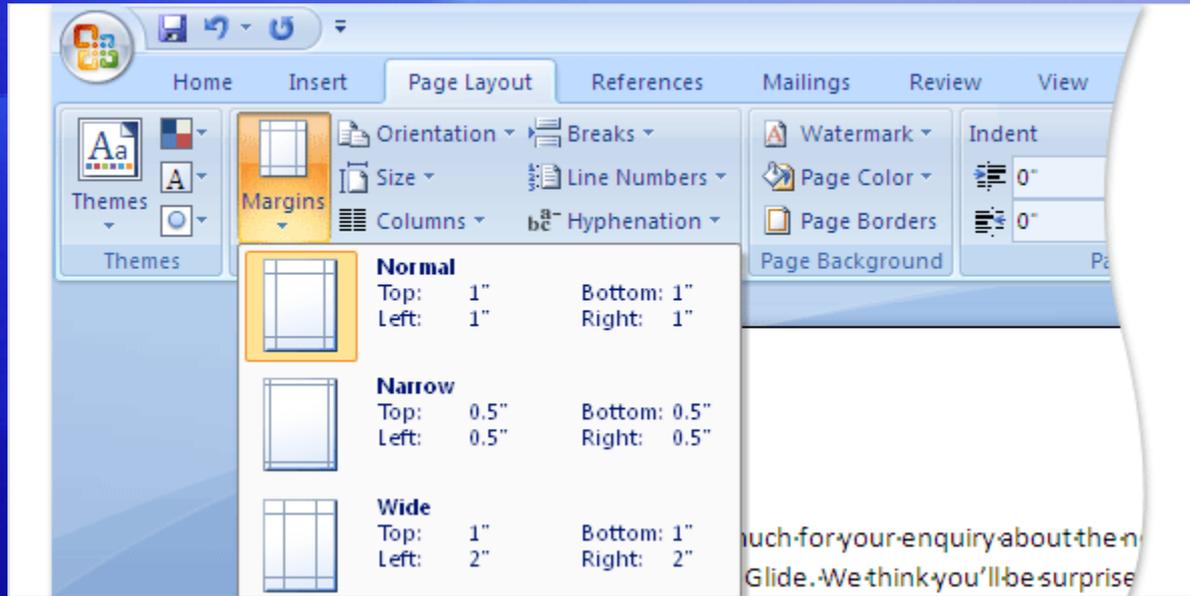


The picture shows an example of what you can do about the wavy underlines, in this case, red for spelling.

Right-click the underlined word to see suggested revisions (every once in a while Word may not have any alternate spellings).

Click a revision to replace the word in the document and get rid of the underlines.

Change page margins



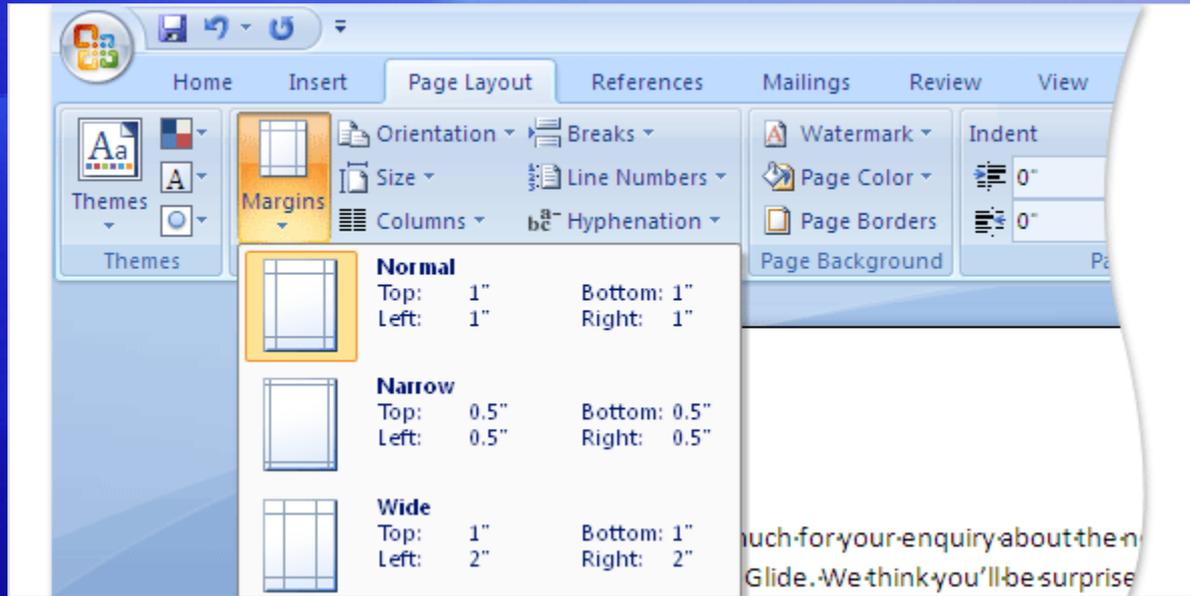
Page margins are the blank spaces around the edges of the page.

There is a 1-inch (2.54-cm) page margin at the top, bottom, left, and right sides of the page.

But if you want different margins, you should know how to change them, which you can at any time.

When you type a very brief letter, for example, or a recipe, an invitation, or a poem, you might like different margins.

Change page margins

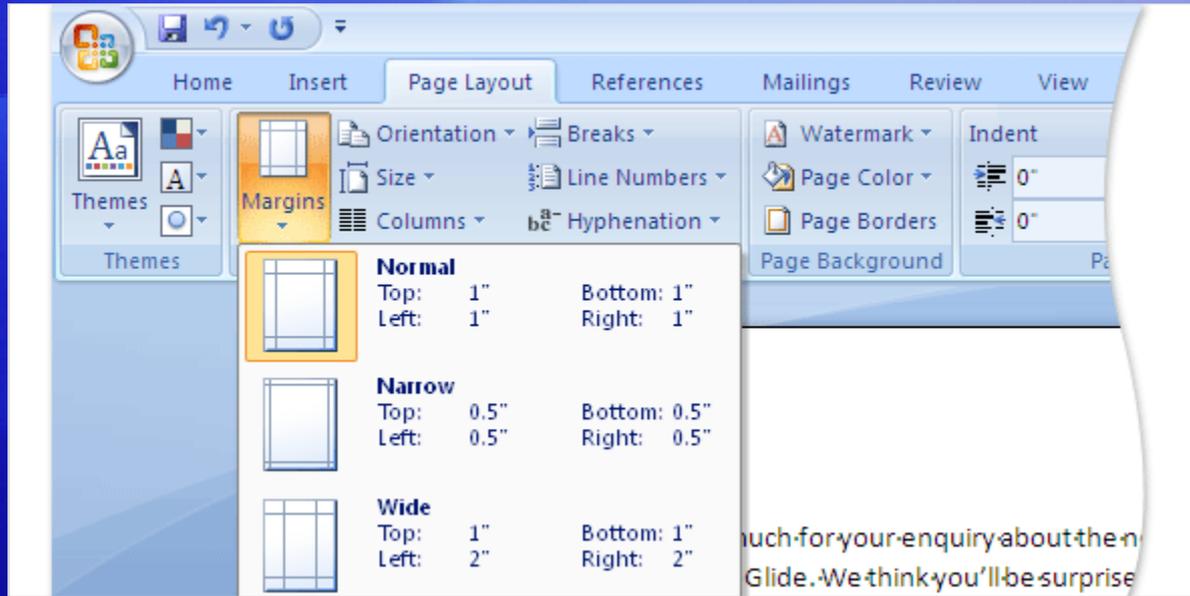


To change margins, use the Ribbon at the top of the window.

Click the **Page Layout** tab. In the **Page Setup** group, click **Margins**.

You'll see different margin sizes, shown in little pictures (icons), along with the measurements for each of the margins.

Change page margins

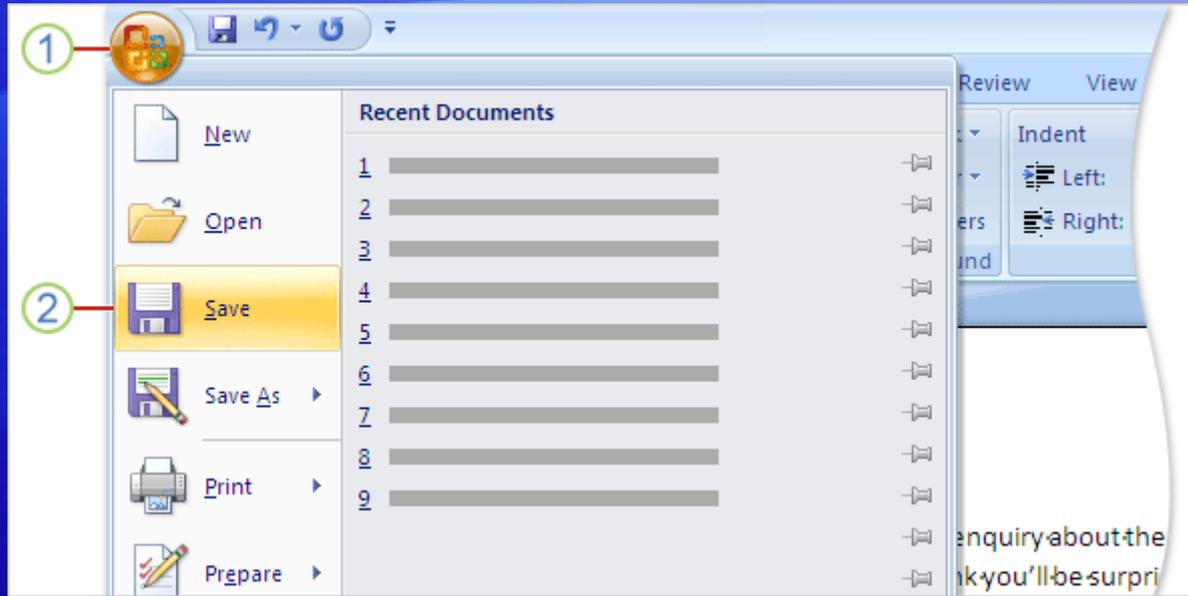


The first margin in the list is **Normal**, the current margin.

To get narrower margins, click **Narrow**. If you want the left and right margins to be much wider, click **Wide**.

When you click the margin type that you want, your entire document automatically changes to the margin type you selected.

Save your work



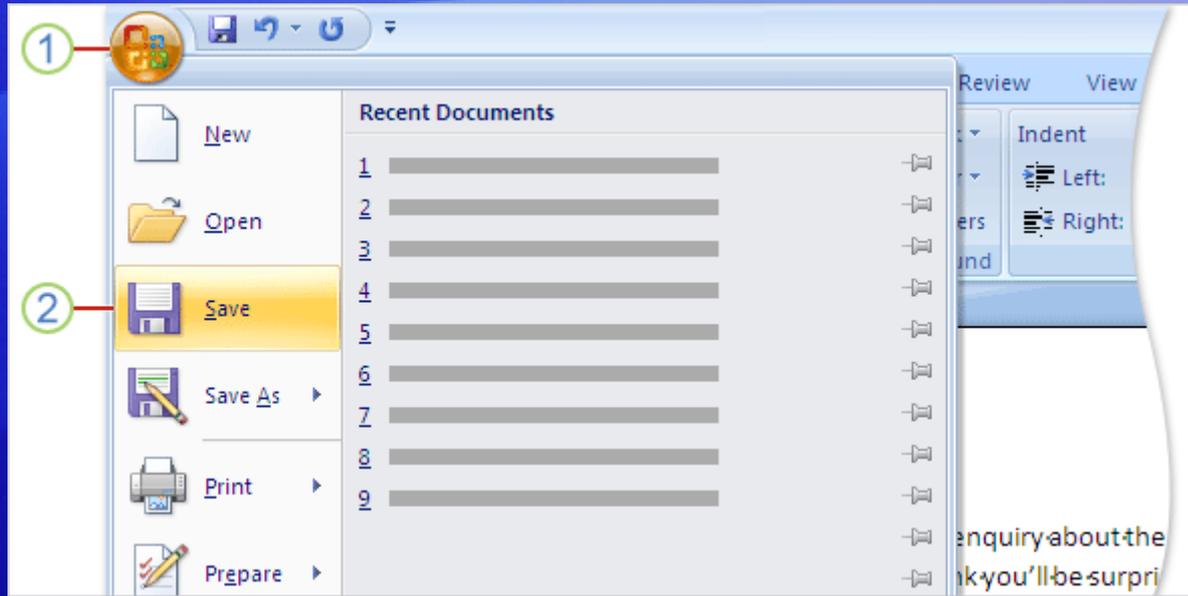
By now you may have a finely tuned sentence or several paragraphs that you'd regret losing if your cat jumped on your keyboard, or if a power failure shut your computer off.

To keep your work, you must save it. It's never too early.

- 1 Click the **Microsoft Office Button**  in the upper-left corner of the window.
- 2 Click **Save**. A dialog box opens, where you tell Word where you want to store the document on your computer and what you want to call it.

Create your first document

Save your work



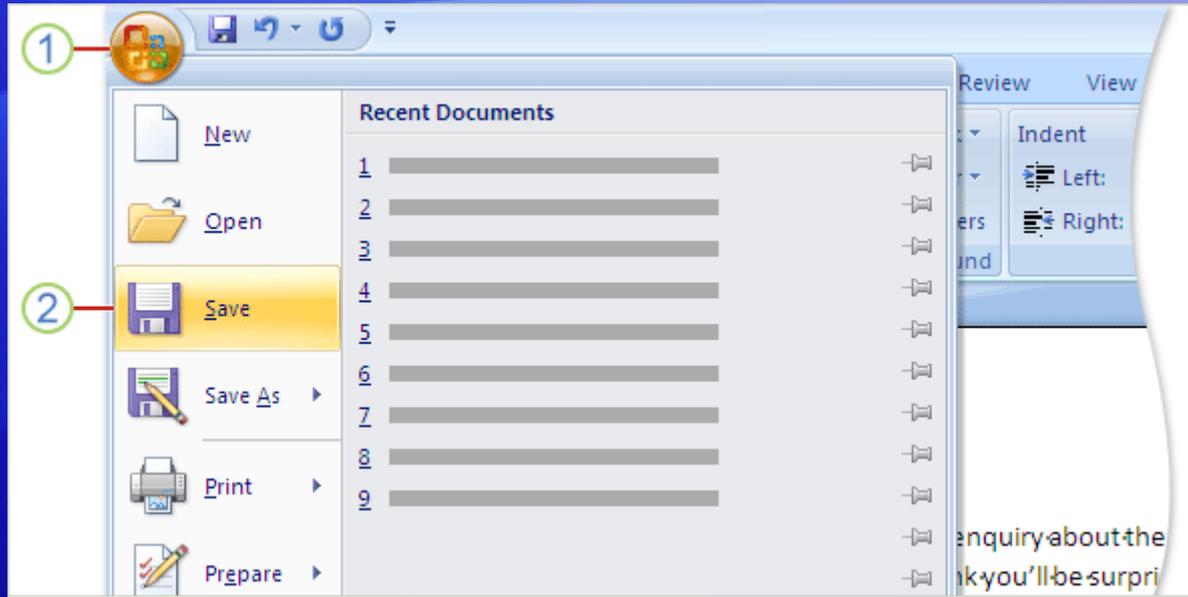
After you save your document, and you continue to type, save your work as you go.

Every once in a while, click the **Save** button  on the Quick Access Toolbar in the upper-left corner of the window.



Create your first document

Save your work



After you save your document, and you continue to type, save your work as you go.

When you are through with the document and have saved your work, close the file. Click the **Microsoft Office Button**, and then click **Close**.

Suggestions for practice

1. Turn formatting marks on.
2. Do some typing in your document.
3. Work with revision marks.
4. Change page margins.
5. Save your document.

[Online practice](#) (requires Word 2007)

Test question 1

When should you save your document? (Pick one answer.)

1. Soon after you begin working.
2. When you're through typing it.
3. It doesn't matter.

Test question 1: Answer

Soon after you begin working.

It takes just a second to lose your work. Get in the habit of saving early, and saving often.

Test question 2

Word puts a red underline beneath text. The word must be misspelled. (Pick one answer.)

1. True.
2. False.

Test question 2: Answer

False.

Word enters wavy red underlines beneath misspelled words. But Word does not have every word in its dictionary. Some words, such as proper names, may get an underline because Word does not recognize the word.

Test question 3

Word inserts a blue underline in your document. What's going on? (Pick one answer.)

1. There's a grammatical error.
2. A word is correctly spelled but is used incorrectly in a sentence.
3. A proper name is misspelled.

Test question 3: Answer

A word is correctly spelled but used incorrectly in a sentence.

You'll see blue, for example, if you type "too", but the word should be "to."

Quick Reference Card

For a summary of the tasks covered in this course, view the [Quick Reference Card](#).

JohnRouda.com presents:

Microsoft® Office Word 2007 Training

**Decorate documents with
backgrounds, borders,
and text effects**

Course contents

- Overview: Less plain, more polished
- Lesson 1: Add a watermark or background
- Lesson 2: Add borders, shading, and styles
- Lesson 3: Use special text effects

Each lesson includes a list of suggested tasks and a set of test questions.

Overview: Less plain, more polished



Your document is complete, but it's begging for color, polish, and sparkle, all of which you can achieve by using decorative elements in Word 2007.

For example, add defining borders to pages and pictures, use colorful backgrounds for Web documents, and communicate information using a page watermark.

This course shows you these snazzy techniques, and more.

Decorate documents with
backgrounds, borders, and text effects

Course goals

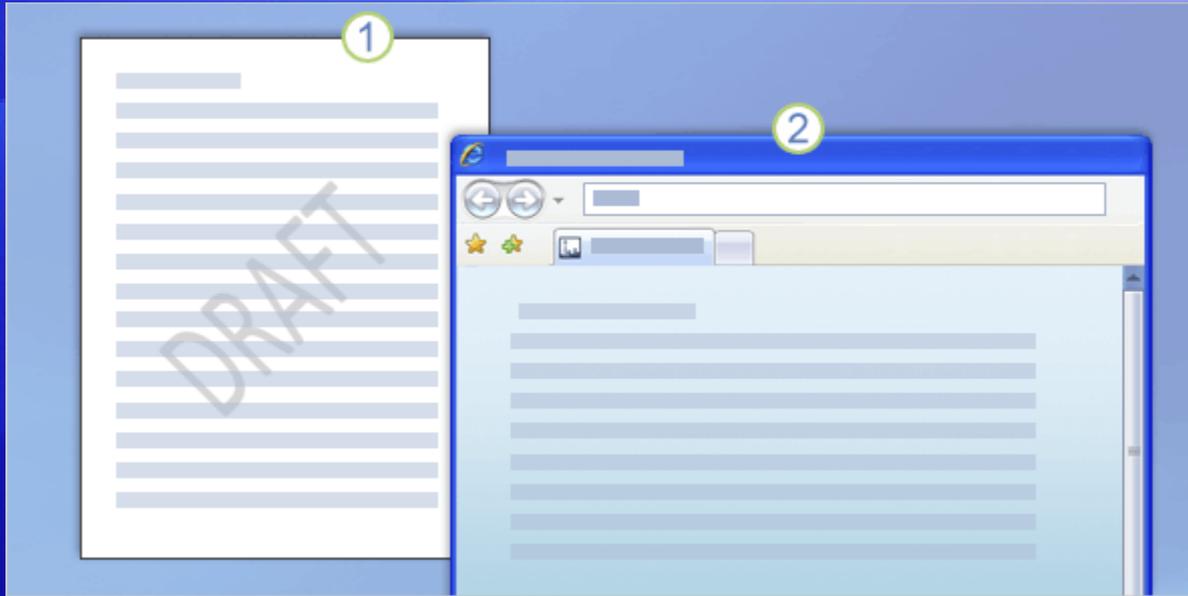
- Add a custom watermark to printed documents.
- Add a colorful background to Web-based documents.
- Add defining borders to pages, paragraphs, pictures, or tables.
- Use shading to emphasize headings or paragraphs.
- Give color and snap to shapes and tables.
- Make headings more professional with text effects and WordArt.

Decorate documents with
backgrounds, borders, and text effects

Lesson 1

Add a watermark or background

Add a watermark or background



Do you want to visually convey that a document is draft only? Or that the information is strictly confidential?

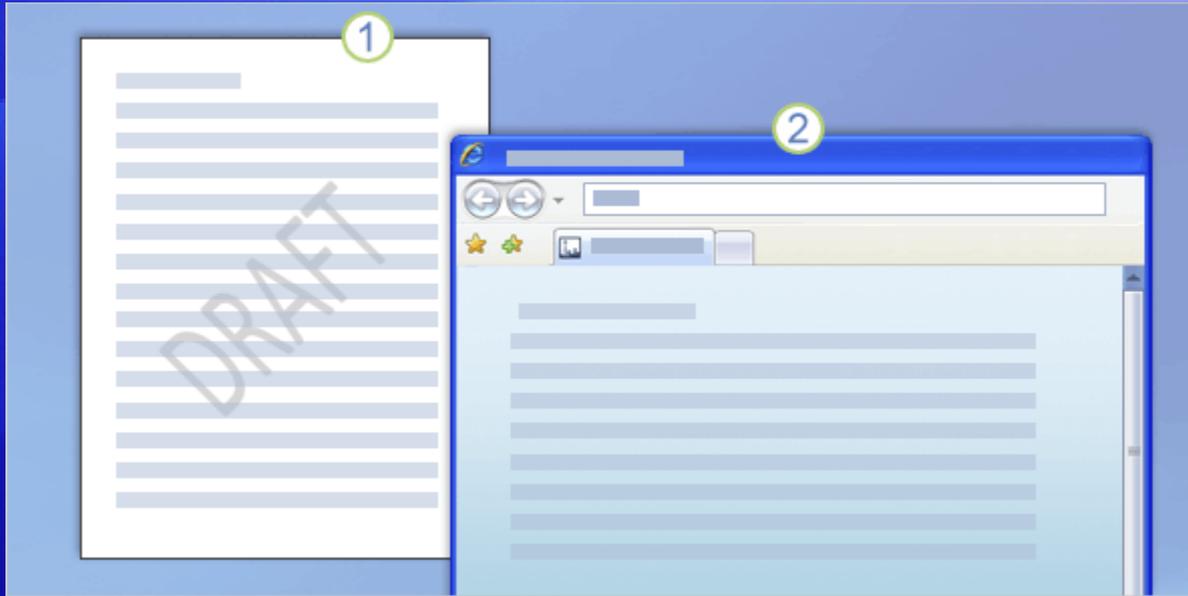
You can do that with a watermark.

Example ① shows what a watermark is. The watermark tells people something about the document.

Watermarks are semitransparent in color, so they sit behind and don't divert people's attention from the document's content. They are for documents that will be printed.

Decorate documents with
backgrounds, borders, and text effects

Add a watermark or background



Another sort of background, shown in example ②, is purely for decoration and is intended for documents you'd post to a Web site.

You can add all sorts of colorful backgrounds, including solid colors, gradients, patterns, textures, and even pictures.

The goal is to liven up the page — but you don't want to make it hard to read.

Decorate documents with backgrounds, borders, and text effects

Add a watermark to a printed document



Here are examples of watermarks.

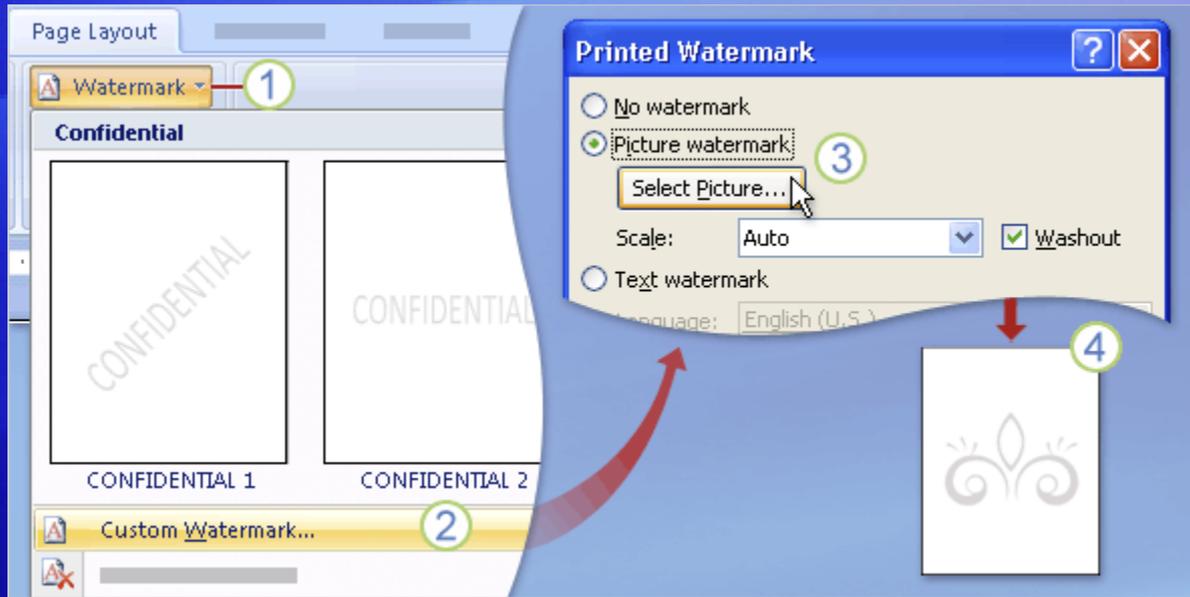
The ones with text are typical of what's available in the watermark gallery in Word 2007.

Once the watermark's inserted, you can see it in Print Layout view, in print preview, or in the printed document.

As this indicates, watermarks are intended for printed documents — they will not show up in the Web Layout view of the document, which is the view used if you post the document to a Web site.

Decorate documents with
backgrounds, borders, and text effects

Add a picture watermark



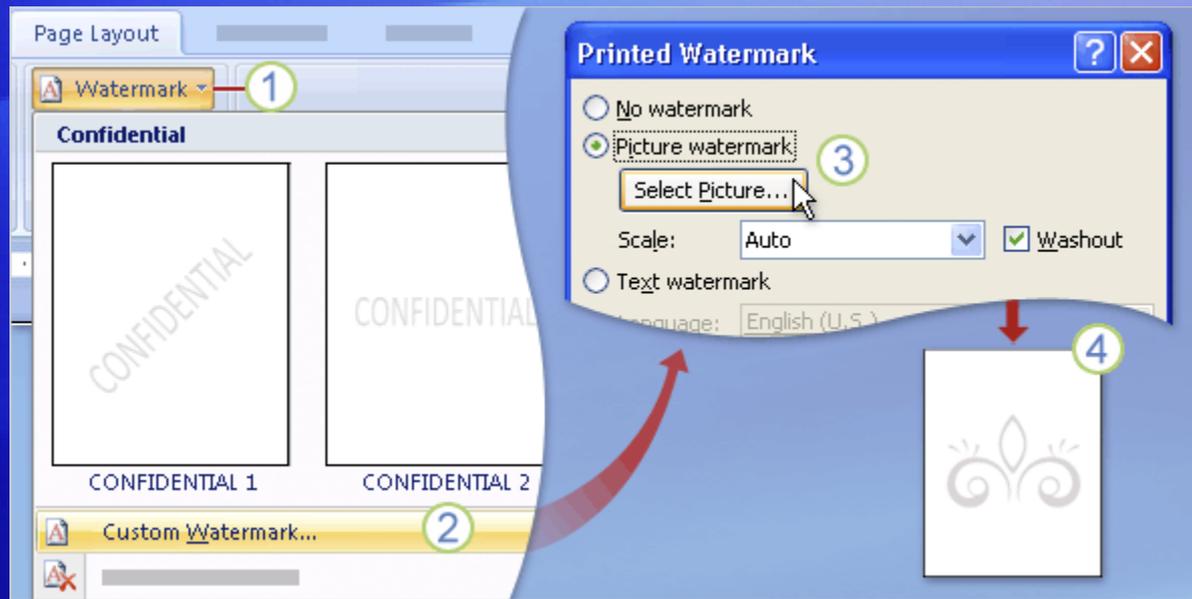
For a custom watermark, you can use either text or a picture.

These steps show how you'd create a picture watermark.

- ① On the **Page Layout** tab, click **Watermark** to open the gallery.
- ② Click **Custom Watermark**, at the bottom of the gallery.

Decorate documents with
backgrounds, borders, and text effects

Add a picture watermark



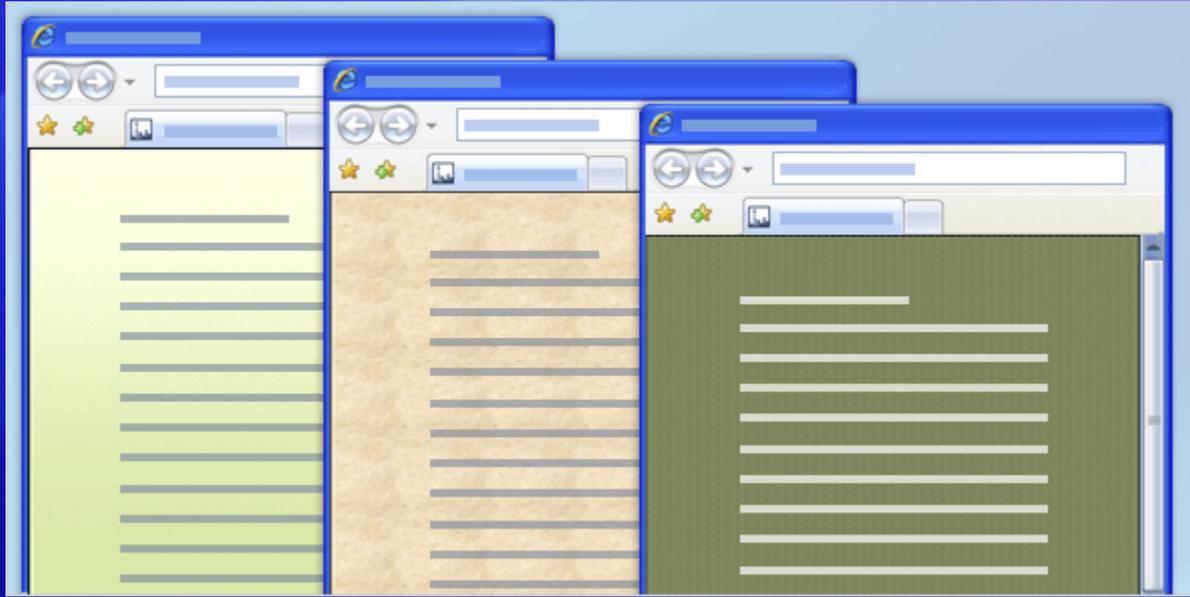
For a custom watermark, you can use either text or a picture.

These steps show how you'd create a picture watermark.

- 3 Click **Picture watermark**, and select your picture. Use any image on your computer, or clip art in the Microsoft Clip Organizer.
- 4 Your result might look something like the example shown.

Decorate documents with
backgrounds, borders, and text effects

Add a background to a Web document



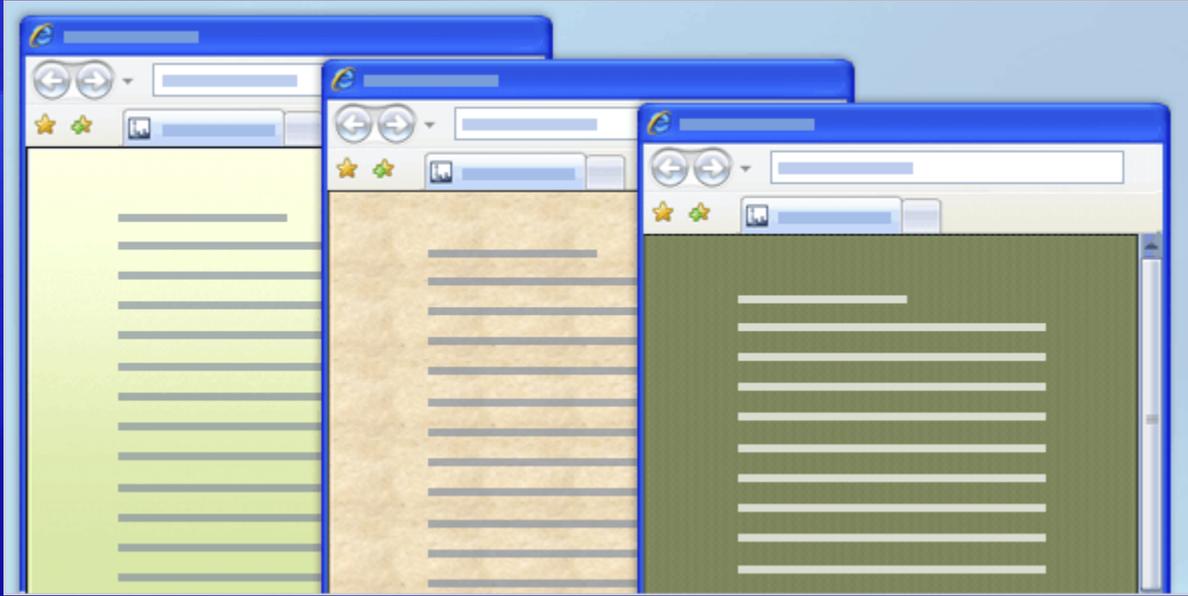
Use a colorful background to add boldness or flavor to Web documents.

You add a background from the **Page Layout** tab, by clicking **Page Color**.

From there, you can apply a solid color or click **Fill Effects** to choose a gradient, textured, or patterned background, as shown here. Or, you can apply a picture from your computer.

Decorate documents with backgrounds, borders, and text effects

Add a background to a Web document



Use a colorful background to add boldness or flavor to Web documents.

Important: Don't overpower your text with the background you choose. You want it to complement the text, not make it unreadable.

Decorate documents with backgrounds, borders, and text effects

Suggestions for practice

1. Add a text watermark.
2. Add a picture watermark.
3. Save a watermark to the gallery.
4. Add a background to a Web document.
5. Bonus: Set up Word to print backgrounds

[Online practice](#) (requires Word 2007)

Test 1, question 1

What's the main purpose of a watermark? (Pick one answer.)

1. Authenticate your printed document as the original.
2. Add a dappled, water-like finish to your printed document.
3. Communicate useful information or add visual interest in printed documents, without overpowering the main text.

Test 1, question 1: Answer

Communicate useful information or add visual interest in printed documents, without overpowering the main text.

You can add a text watermark such as “Confidential,” “Draft,” or any designator you choose. You can also add a picture watermark. Both sit behind your text so that they don’t obscure it.

Test 1, question 2

You have to be in Print Layout view to see or customize a watermark in a document. (Pick one answer.)

1. True.
2. False.

Test 1, question 2: Answer

True.

Decorate documents with
backgrounds, borders, and text effects

Test 1, question 3

You want to add a background to a Web document. Which command do you click on the Page Layout tab? (Pick one answer.)

1. Watermark.
2. Page Color.
3. Page Background.

Test 1, question 3: Answer

Page Color.

From here, you can apply a solid color or click Fill Effects to choose a gradient, textured, or patterned background, or you can apply a picture from your computer.

Lesson 2

Add borders, shading, and styles

Add borders, shading, and styles



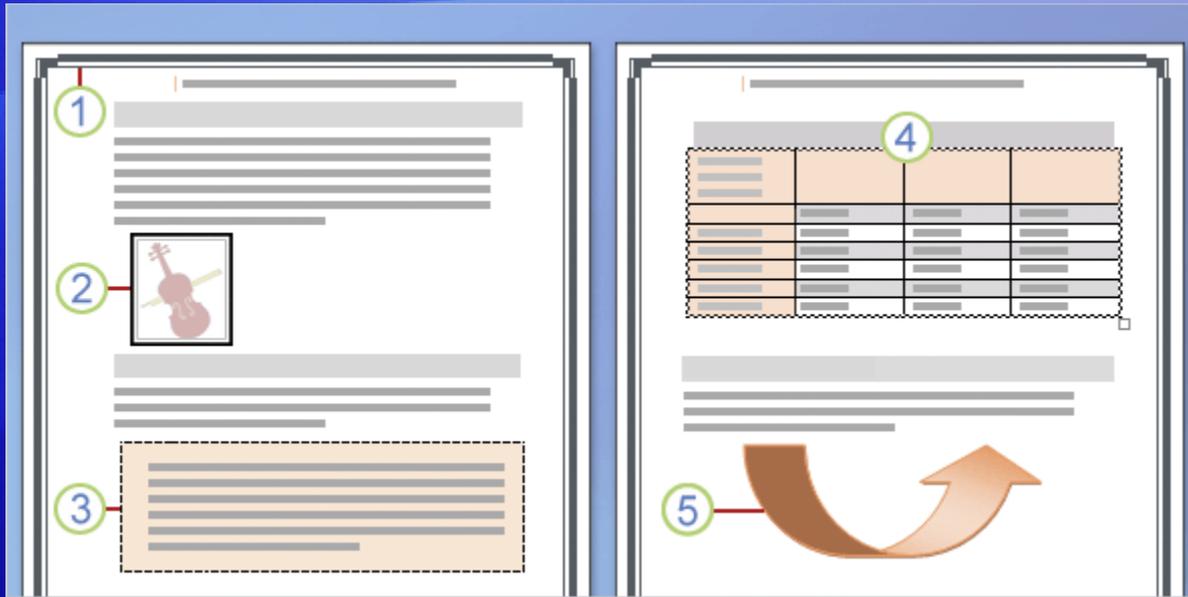
Borders, shading, and decorative effects aren't just for holiday newsletters.

Word gives you many ways to spruce up your documents all year round.

- 1 Apply page borders for results ranging from playful to business-sharp.
- 2 For pictures, add new style effects, such as shadows and reflections, or simple borders.
- 3 Emphasize whole paragraphs with shading and borders.

Decorate documents with
backgrounds, borders, and text effects

Add borders, shading, and styles



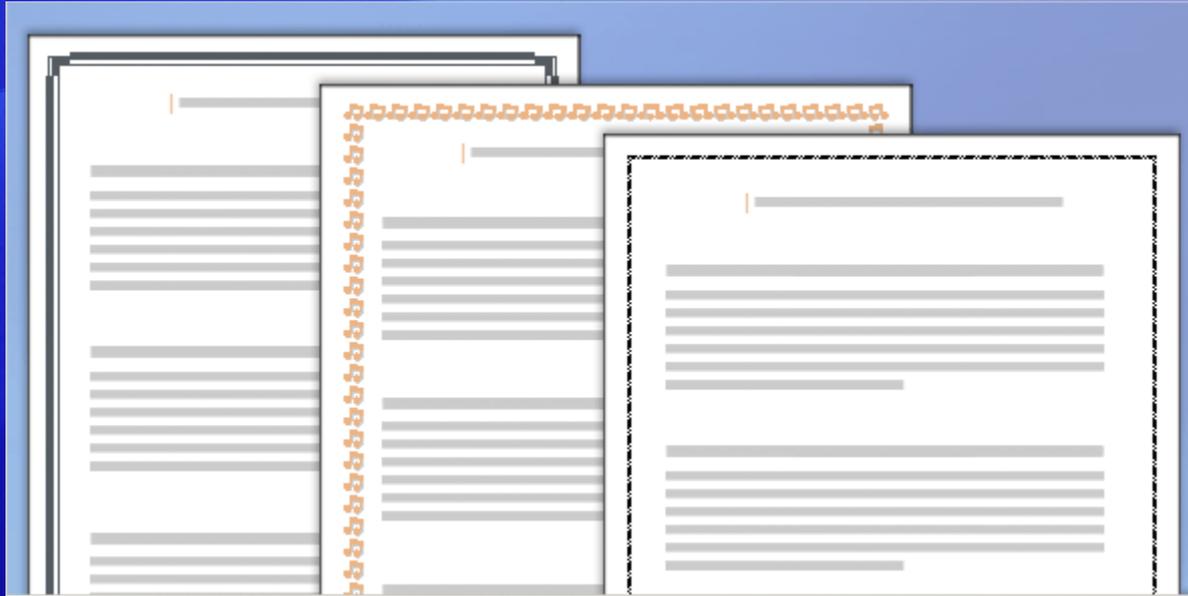
Borders, shading, and decorative effects aren't just for holiday newsletters.

Word gives you many ways to spruce up your documents all year round.

- ④ Choose from new table styles to instantly add color and formatting.
- ⑤ Give flair to shapes with new styles and fill effects.

Decorate documents with
backgrounds, borders, and text effects

Page borders



You can add full or partial borders to a page.

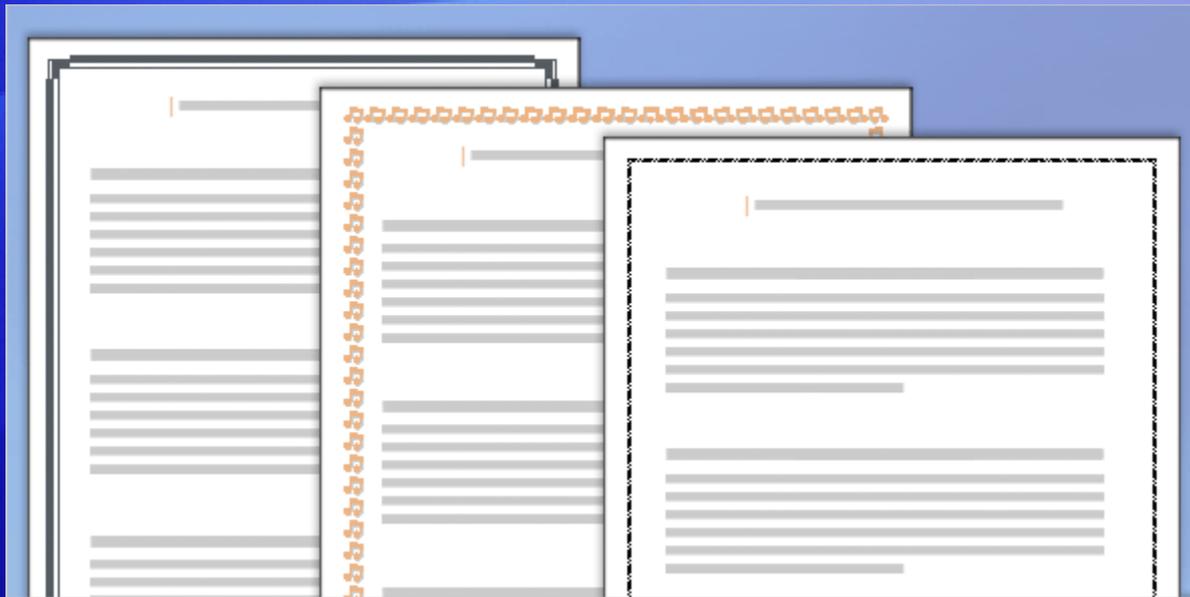
Word provides a variety of built-in page borders, from businesslike to fancy.

You can choose:

- The type of border, from simple box to shadowed to 3-D to a custom style of your own design.
- The line style, color, and thickness.
- The artistic style.

Decorate documents with
backgrounds, borders, and text effects

Page borders



You apply a page border from the **Page Layout** tab, using the **Page Border** command.

And you can preview your border design, so it's easy to see how your chosen effect will look.

Decorate documents with
backgrounds, borders, and text effects

Borders for pictures, text, and tables

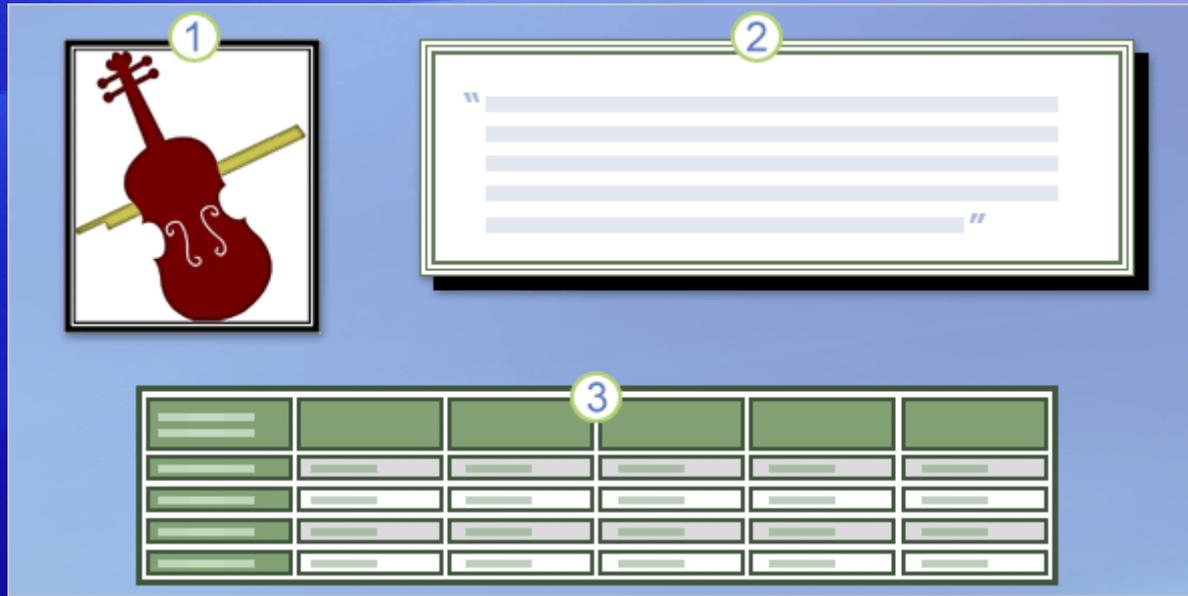


Try borders around various elements within a document, such as the ones shown here.

- 1 Use a border to make a picture stand out.
- 2 A border can nicely offset an important quotation.
- 3 Borders can be very effective in tables. Apply them to every cell if you want that look.

Decorate documents with
backgrounds, borders, and text effects

Borders for pictures, text, and tables



The methods for adding borders vary depending on what you're adding a border to.

For a picture, Word 2007 offers a whole new set of picture styles that include borders as well as effects such as reflections and shading.

You find these styles by selecting the picture and then working with the **Picture Tools** on the Ribbon.

Decorate documents with
backgrounds, borders, and text effects

Borders for pictures, text, and tables

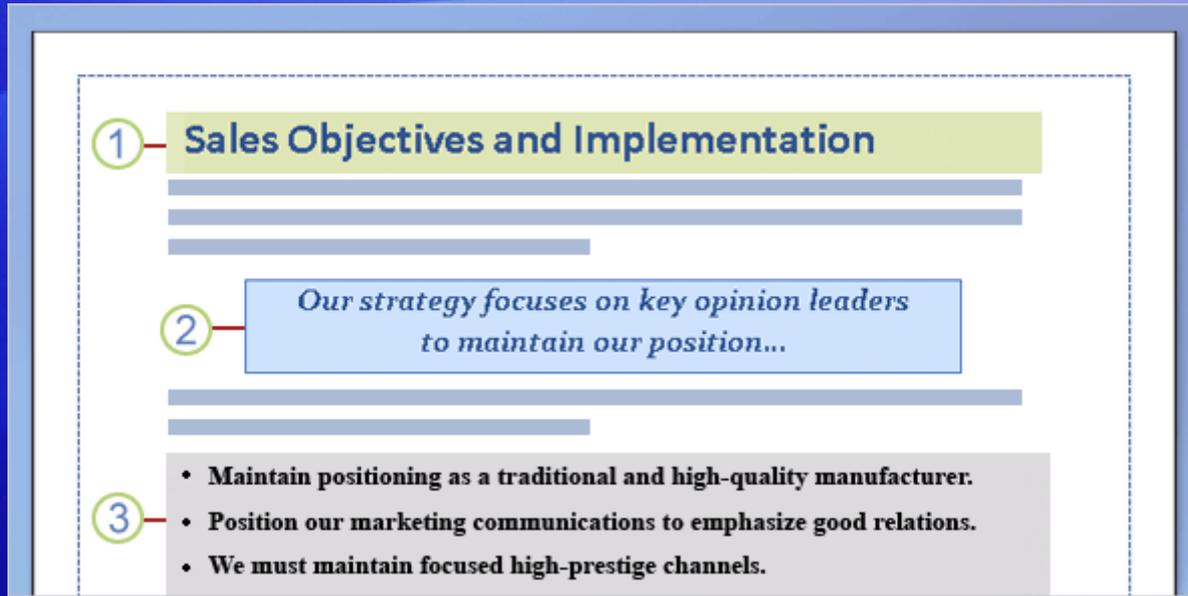


The methods for adding borders vary depending on what you're adding a border to.

For other graphics, such as tables, and for text, you'll find border options similar to those you'd use for page borders.

These are opened from the **Page Layout** tab.

Shading



Use shading to emphasize text. These examples give an idea.

- ① Make a heading stand out.
- ② Use a quotation style and apply a shading background and border to it.
- ③ Set off a list.

Decorate documents with backgrounds, borders, and text effects

Shading



Use shading to emphasize text. These examples give an idea.

You find shading options in the same place as border options: Start on the **Page Layout** tab, and click **Page Borders**.

Decorate documents with backgrounds, borders, and text effects

Quick styles for tables

PER MARKET SEGMENT					
	1995	1996	1997	1998	1999
Acoustic	30.00%	30.00%	26.00%	26.00%	24.00%
Electric	18.96%	17.00%	15.00%	12.00%	9.00%
Keyboards	14.00%	15.00%	17.00%	25.00%	35.00%
Speakers	6.00%	8.00%	10.00%	15.00%	25.00%

PER MARKET SEGMENT					
	1995	1996	1997	1998	1999
Acoustic	30.00%	30.00%	26.00%	26.00%	24.00%
Electric	18.96%	17.00%	15.00%	12.00%	9.00%
Keyboards	14.00%	15.00%	17.00%	25.00%	35.00%
Speakers	6.00%	8.00%	10.00%	15.00%	25.00%

If you want to give coordinated colors and shading to a table, use one of the new table styles.

These each have a unique format and use of color, for a professional result.

It's more efficient to use a table style than to try to add shading and borders row by row or cell by cell.

Decorate documents with
backgrounds, borders, and text effects

Quick styles for tables

PER MARKET SEGMENT					
	1995	1996	1997	1998	1999
Acoustic	30.00%	30.00%	26.00%	26.00%	24.00%
Electric	18.96%	17.00%	15.00%	12.00%	9.00%
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Speakers	6.00%	8.00%	10.00%	15.00%	25.00%

PER MARKET SEGMENT					
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Electric	18.96%	17.00%	15.00%	12.00%	9.00%
Keyboards	14.00%	15.00%	17.00%	25.00%	35.00%
Speakers	6.00%	8.00%	10.00%	15.00%	25.00%

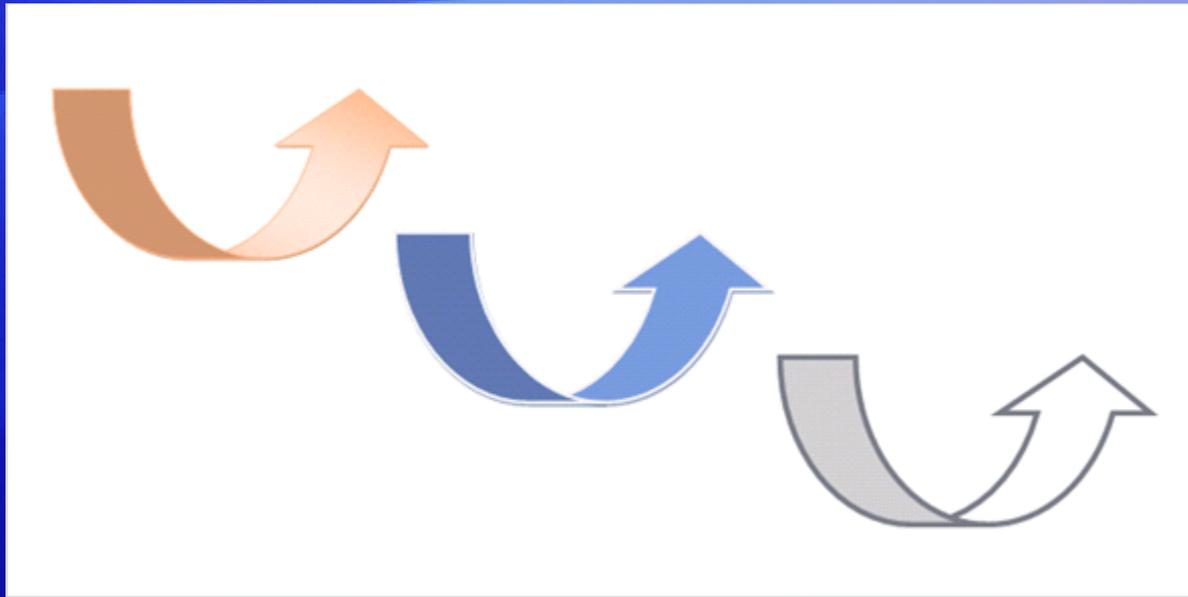
The picture shows two examples of table styles.

Each draws upon one set of colors, available in a theme called Oriel.

You apply a table style by selecting the table in the document and working with **Table Tools** on the Ribbon.

Decorate documents with
backgrounds, borders, and text effects

Quick styles for shapes



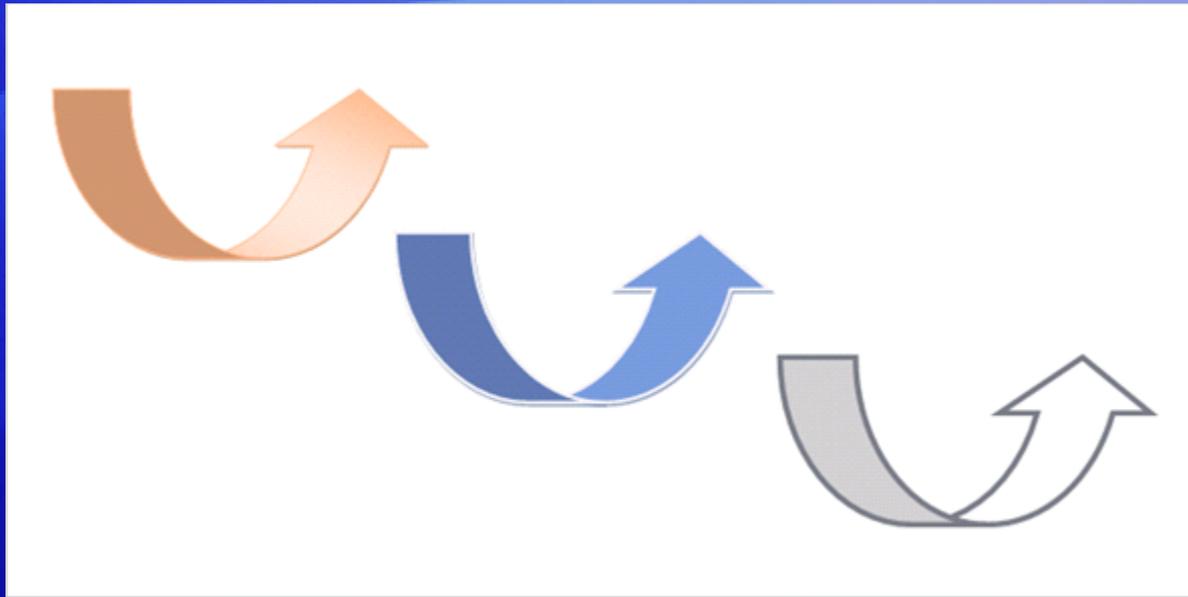
Shapes, such as the arrows shown here, have new styling options in Word 2007.

As with tables, whole packages of finished styles are available to give color and instant finish to circles, arrows, text boxes, and myriad other shapes.

The arrows here have three different styles applied.

Decorate documents with
backgrounds, borders, and text effects

Quick styles for shapes



Shapes have their own tools, as tables and pictures do.

You first select the shape, and then work with the **Drawing Tools** to select a style — which comes complete with border, look, and type of fill.

You can tinker as you wish with the fill and border.

Decorate documents with
backgrounds, borders, and text effects

Suggestions for practice 2

1. Add a page border.
2. Apply a border to a picture.
3. Shade a heading.
4. Apply a table style.
5. Add borders to the table.
6. Add a gradient fill and a style to a shape.
7. Use a theme to change the document's overall look.

[Online practice](#) (requires Word 2007)

Test 2, question 1

To add borders or shading to a page or to text, you start from which Ribbon tab? (Pick one answer.)

1. The **Format** tab under **Drawing Tools**.
2. The **Insert** tab.
3. The **Page Layout** tab.

Test 2, question 1: Answer

The **Page Layout** tab.

On this tab, click **Page Borders** to open the **Borders and Shading** dialog box. Choose the tab that has what you want: **Borders**, for text or a paragraph; **Page Borders**, for a whole page or section; and **Shading**, for text or a paragraph.

Test 2, question 2

What's the quickest way to add visual formatting to a table?
(Pick one answer.)

1. Use the **Shading** and **Borders** buttons within **Table Tools** to format individual rows and columns.
2. Apply a table style.

Test 2, question 2: Answer

Apply a table style.

Select the table. The **Table Tools** appear, with the **Design** tab. There, choose from the array of coordinated **Table Styles** complete with borders, shading, colors, and other formatting.

Test 2, question 3

You have a circle shape in your document that you want to apply a gradient fill to. What's the first step? (Pick one answer.)

1. Click the **Insert** tab.
2. Select the circle.
3. Click the **Shape Fill** button.

Test 2, question 3: Answer

Select the circle.

Selecting the circle makes the **Drawing Tools** appear, which you can use to apply the look you want.

Lesson 3

Use special text effects

Use special text effects



How do you emphasize text?

Word offers some formatting choices for text that offer more visual impact than the old standbys, bold and italic.

They include:

- A dropped capital letter, used at the start of a document or beginning of a new chapter.
- Text effects such as emboss, engrave, and shadow.
- WordArt formatting for bold flash.

Decorate documents with backgrounds, borders, and text effects

Create a drop cap



An ancient illuminated text, the start of a fairy tale, the large first letter that sometimes begins a chapter.

In modern typography, that's referred to as a **drop cap**.

The steps are simple: You select the letter you want to turn into a drop cap, and click **Drop Cap** on the **Insert** tab.

The drop cap sits in a text box, and you can apply any text formatting to it. The picture shows examples of different fonts you might use.

Decorate documents with
backgrounds, borders, and text effects

Create a drop cap



You can turn only a single letter into a drop cap.

Even if you select a block of text, only the first letter is affected.

Also, only the first letter of a paragraph can become a drop cap.

Decorate documents with
backgrounds, borders, and text effects

Special font effects

① The National Museum

② The National Museum

③ The National Museum

While font style and color do a lot to give impact to text, you can add a little more to the look with different effects.

The picture shows examples.

- ① An embossing effect makes the text look raised off the page.
- ② An outline effect, removes the solid color fill in the text.
- ③ An engraving effect makes text look pressed into the page.

Decorate documents with
backgrounds, borders, and text effects

Special font effects

- ① The National Museum
- ② The National Museum
- ③ The National Museum

These three effects, plus **shadowing** (not shown) can be used to make a simple heading look more like a logo.

They have more impact on bigger font sizes, sometimes they're enhanced by bold or italic formatting, and they're best used sparingly.

Add WordArt



WordArt is not for the faint of heart.

Where text effects operate on subtlety, WordArt is big and flashy, and treats text almost like a graphic.

Create WordArt by typing the text you want to style in a WordArt editing dialog box (opened from the **Insert** tab).

Once WordArt is applied, you treat the affected text somewhat like a picture. You click to select it, which makes **WordArt Tools** available, with several formatting options on the **Format** tab.

Decorate documents with
backgrounds, borders, and text effects

Suggestions for practice 3

1. Add a high-impact font effect.
2. Try out tips for ways to access font options.
3. Apply a drop cap effect.
4. Insert WordArt.
5. Format the WordArt with a curve, shadow, and color.

[Online practice](#) (requires Word 2007)

Test 3, question 1

Which of these is the best practice for using text effects such as WordArt? (Pick one answer.)

1. Be sparing.
2. Variety makes the biggest impact.

Test 3, question 1: Answer

Be sparing.

Text effects have the most impact when you limit them.

Test 3, question 2

What's a good way to access font options? (Pick one answer.)

1. On the **Home** tab, in **Font**, click the **More** arrow to open the **Font** dialog box.
2. Select and right-click the text. Then click **Font** on the shortcut menu to open the Font dialog box.
3. Select text you want to change, and watch for the Mini toolbar that appears. Point to it and click anything you want there.
4. All of the above.

Test 3, question 2: Answer

All of the above.

Decorate documents with
backgrounds, borders, and text effects

Test 3, question 3

You want to change the font in the WordArt you just applied. Where do you start? (Pick one answer.)

1. Click **WordArt** on the **Insert** tab.
2. Highlight the WordArt text, and choose a different font in the **Font** dialog box.
3. Click to select the WordArt text (so it has a dashed border), and then click the **Format** tab under **WordArt Tools**.

Test 3, question 3: Answer

Click to select the WordArt text (so it has a dashed border), and then click the **Format** tab under **WordArt Tools**.

This tab appears only when you have selected the WordArt. You can apply shadows and 3-D effects, change the curvature of the shape, change the text or font, apply word wrapping, and other things.

Quick Reference Card

For a summary of the tasks covered in this course, view the [Quick Reference Card](#).

Decorate documents with
backgrounds, borders, and text effects

JohnRouda.com presents:

Microsoft® Office Word 2007 Training

Get up to speed

Course contents

- Overview: Have you heard the word?
- Lesson 1: Get to know the Ribbon
- Lesson 2: Find everyday commands
- Lesson 3: A new file format

The first two lessons include a list of suggested tasks, and all include a set of test questions.

Overview: Have you heard the word?



Word 2007 is out. It's exciting, and it's designed to be better and more productive than the version you're used to.

But it may look a little unfamiliar. So this course will help get you up to speed.

Find out how to get the best out of the new and easier version of Word, and see how to do the everyday things you've always done.

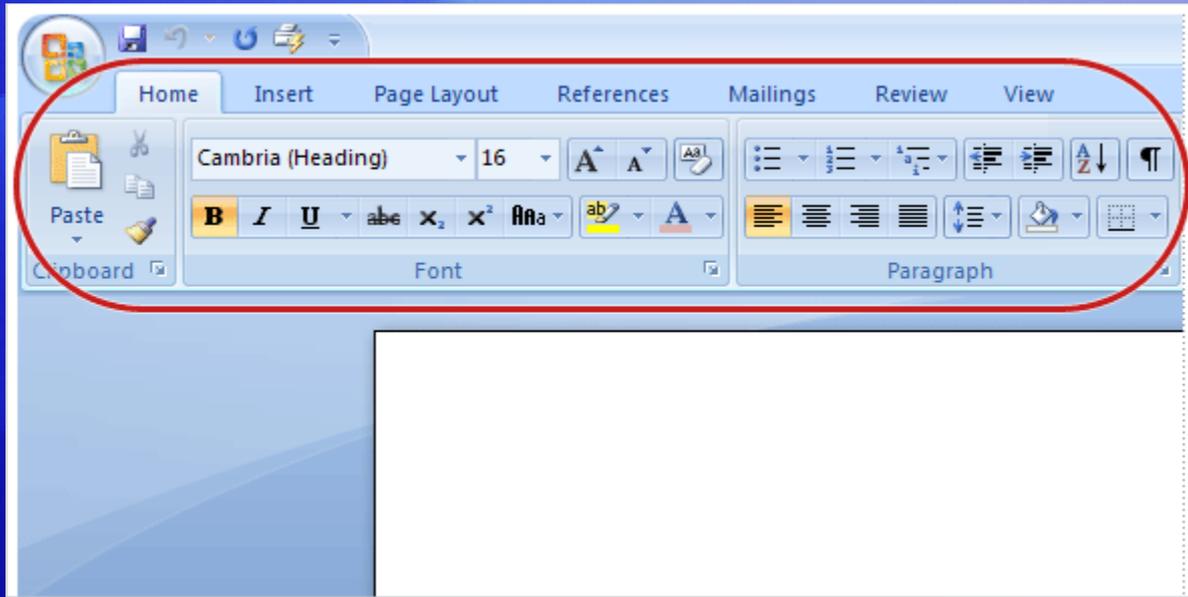
Course goals

- Work with the Ribbon — the new feature that makes Word easier to use than ever before.
- Find the everyday, common commands you need to do your job.
- Use the new Word file format in the way that's best for you.

Lesson 1

Get to know the Ribbon

Get to know the Ribbon



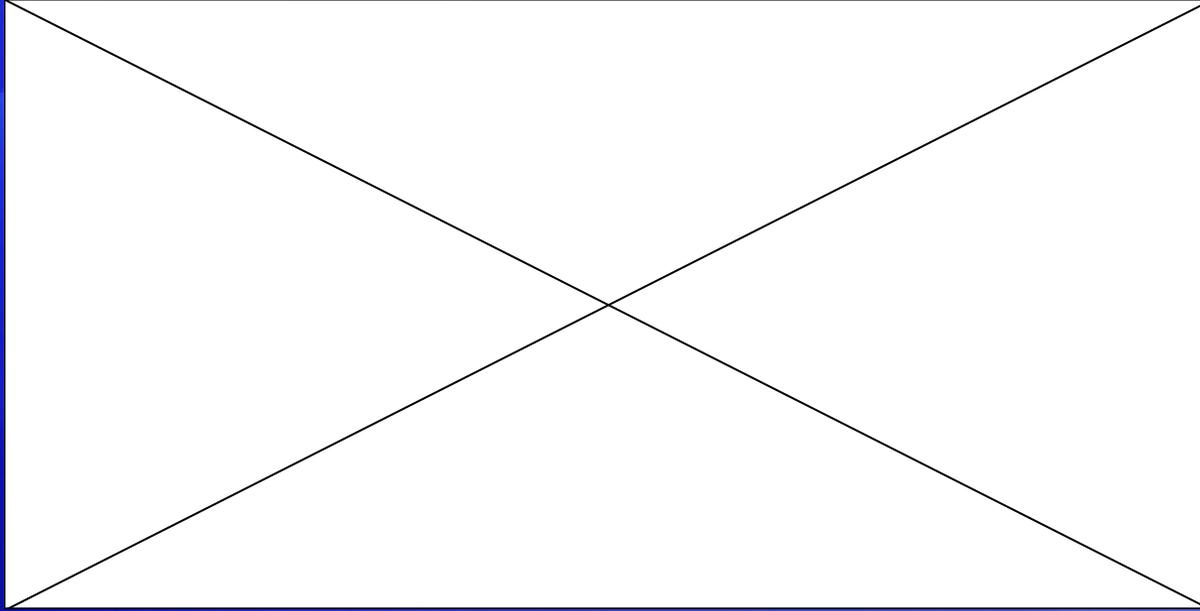
When you first open Word 2007, you may be surprised by its new look.

Most of the changes are in the Ribbon, the area that spans the top of Word.

The Ribbon brings the most popular commands to the forefront, so you don't have to hunt in various parts of the program for things you do all the time.

Why the change? To make your work easier and faster.

The Ribbon in action



The Ribbon's ease of use and convenience are best understood when seen in action.

Animation: Right-click, and click **Play**.

Play the animation to see how to cut and paste text, change text formatting, and alter the page background color, all using the Ribbon.

Get up to speed

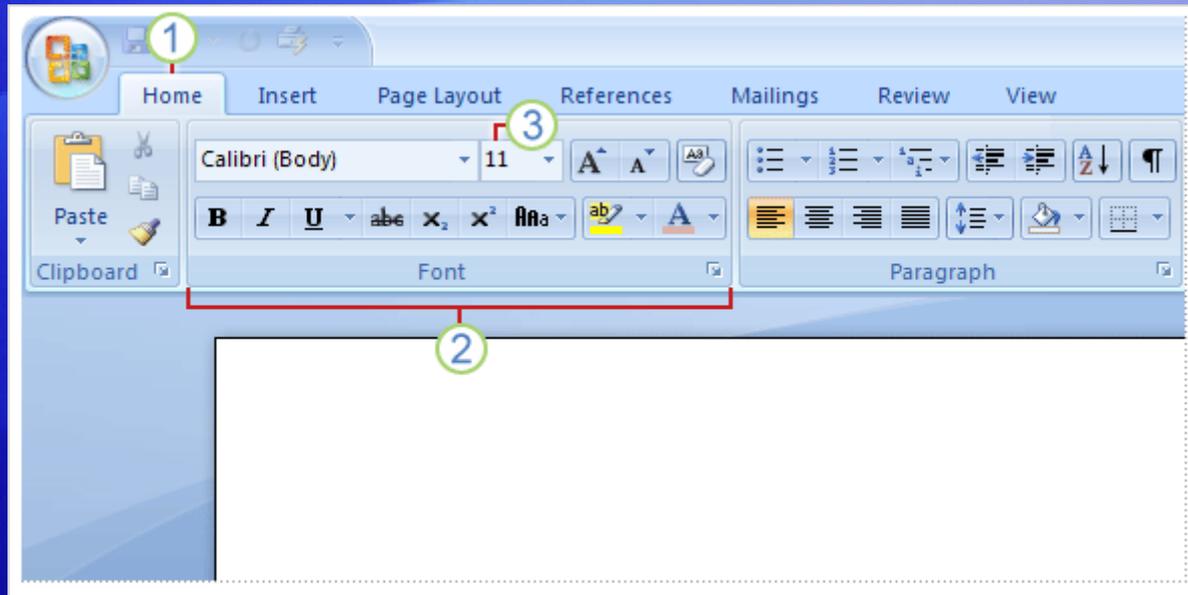
Use the Ribbon for common actions



The Ribbon offers ease of use and convenience, with all common actions shown in one place.

For example, you can cut and paste text by using commands on the **Home** tab; change text formatting by using a **Style**; and alter the page background color on the **Page Layout** tab.

What's on the Ribbon?

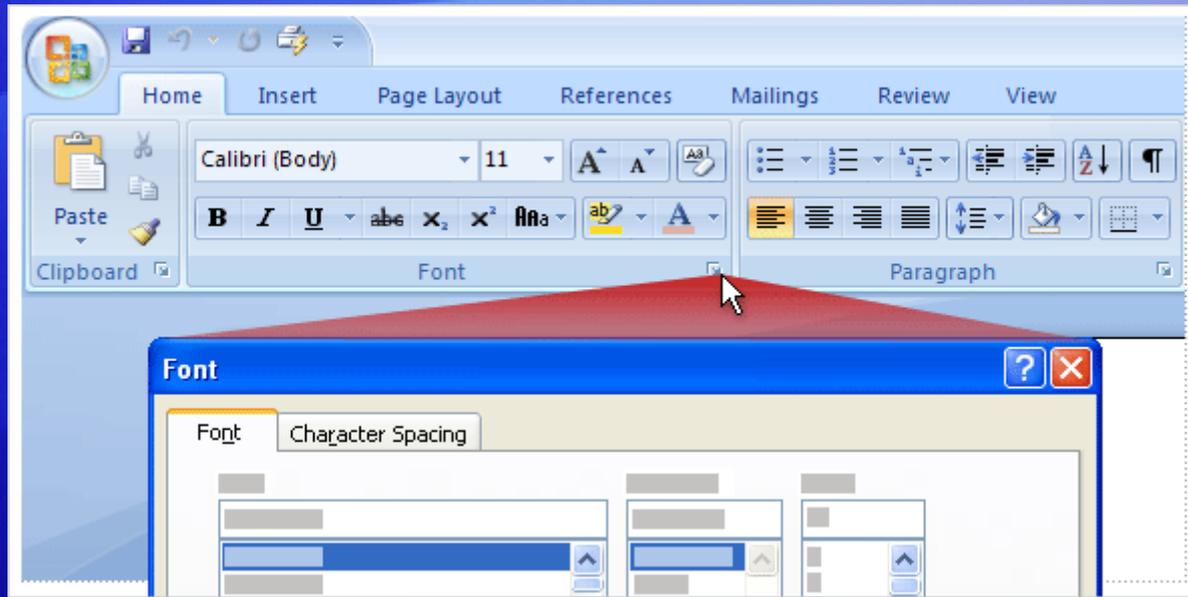


Getting familiar with the three parts of the Ribbon will help you understand how to use it.

They are tabs, groups, and commands.

- ① **Tabs:** The Ribbon has seven basic ones across the top. Each represents an activity area.
- ② **Groups:** Each tab has several groups that show related items together.
- ③ **Commands:** A command is a button, a menu, or a box where you can enter information.

Dialog Box Launchers in groups



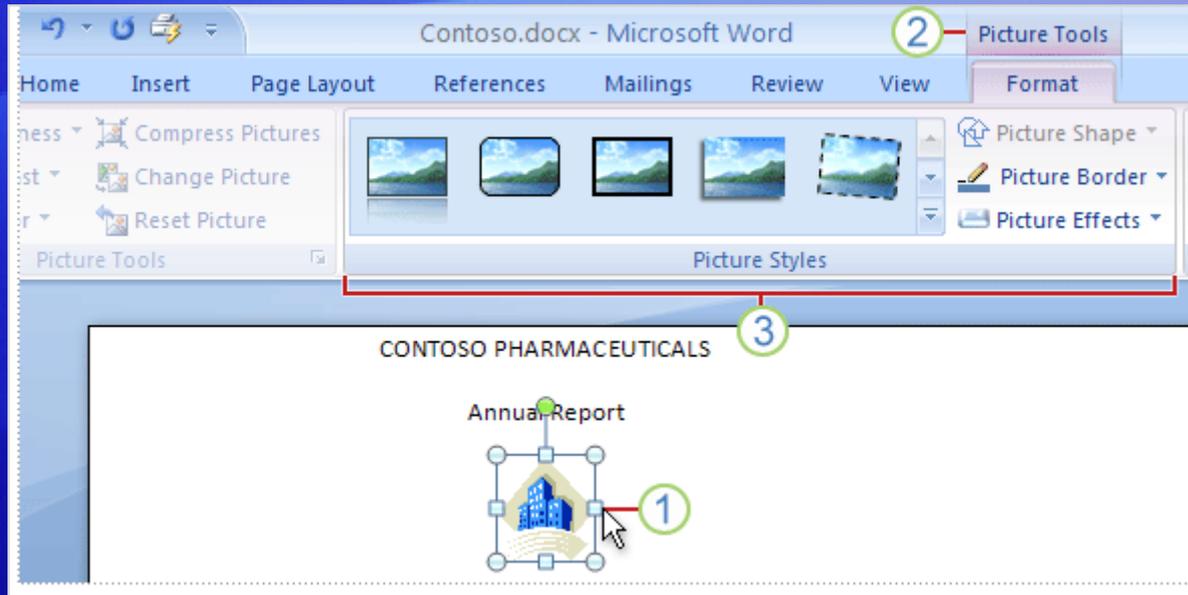
At first glance, you may not see a certain command from a previous version.

Fret not.

Some groups have a small diagonal arrow in the lower-right corner called the **Dialog Box Launcher** .

Click it to see more options related to that group. They'll appear in a familiar-looking dialog box or task pane that you recognize from a previous version of Word.

Additional tabs appear

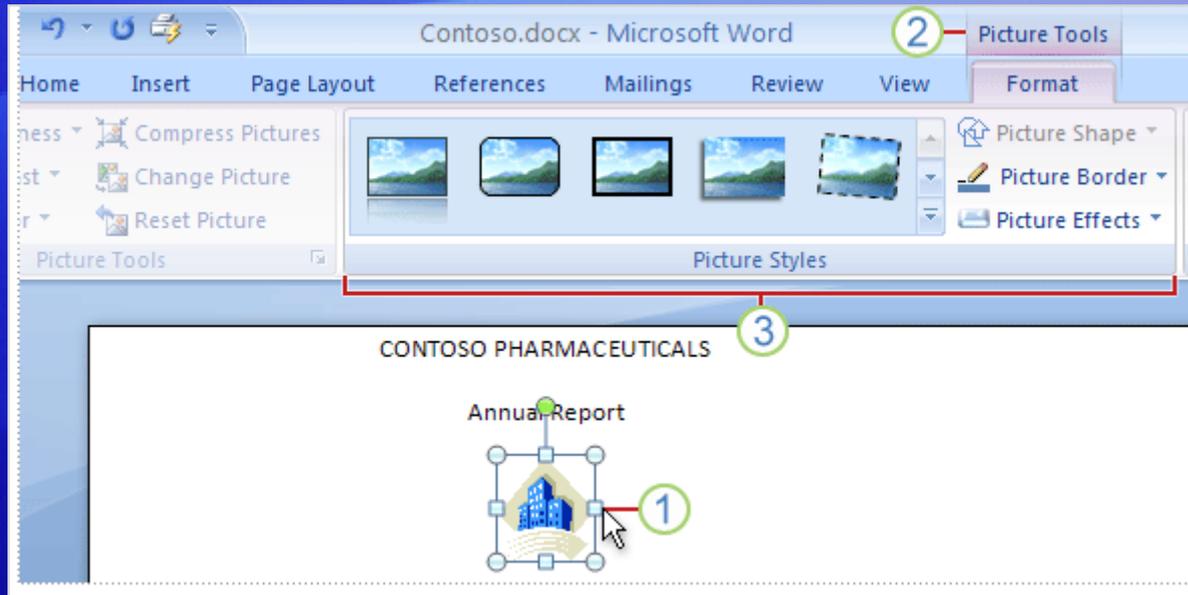


In the new version of Word, certain tabs appear only when you need them.

Say you insert a picture and want to do more with it, like crop it or change how text wraps around it.

Where are those commands found?

Additional tabs appear

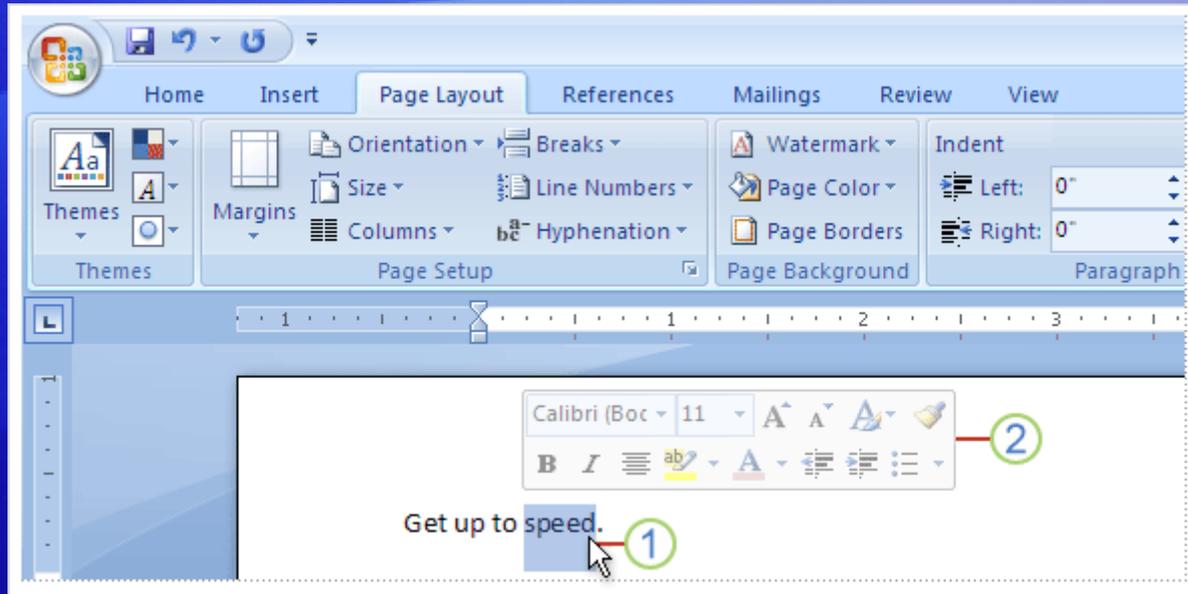


In the new version of Word, certain tabs appear only when you need them.

You don't need to hunt for them. Instead:

- ① Select the picture.
- ② The **Picture Tools** appear. Click the **Format** tab.
- ③ Additional groups and commands appear for working with pictures, like the **Picture Styles** group.

The Mini toolbar



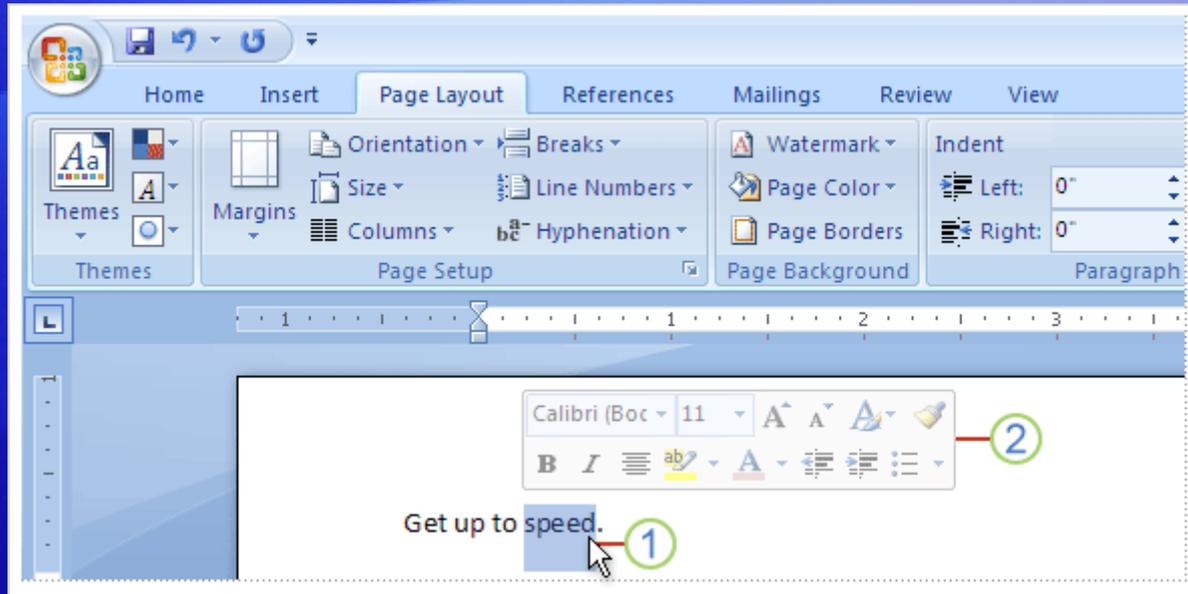
Some formatting commands are so useful that you want them available no matter what you're doing.

Let's say you want to quickly format some text, but you're working on the **Page Layout** tab.

You could click the **Home** tab to see the formatting options, but there's a faster way.

Get up to speed

The Mini toolbar

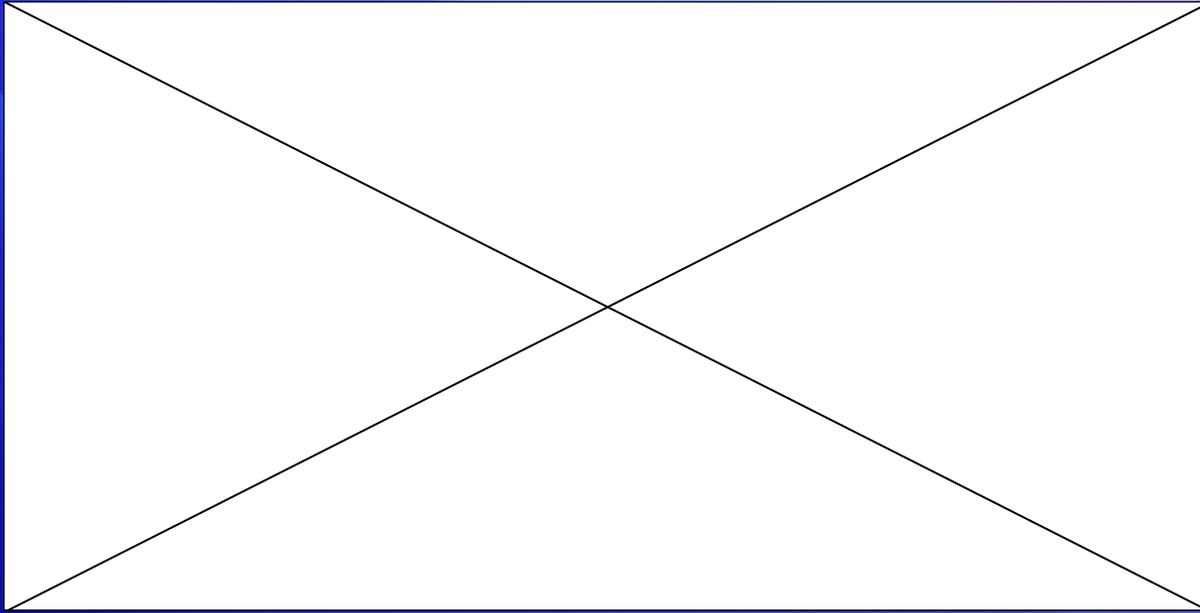


Some formatting commands are so useful that you want them available no matter what you're doing.

- 1 Select your text by dragging with your mouse, and then point at the selection.
- 2 The Mini toolbar will appear in a faded fashion. If you point to the Mini toolbar, it will become solid, and you can click a formatting option on it.

Get up to speed

The Quick Access Toolbar



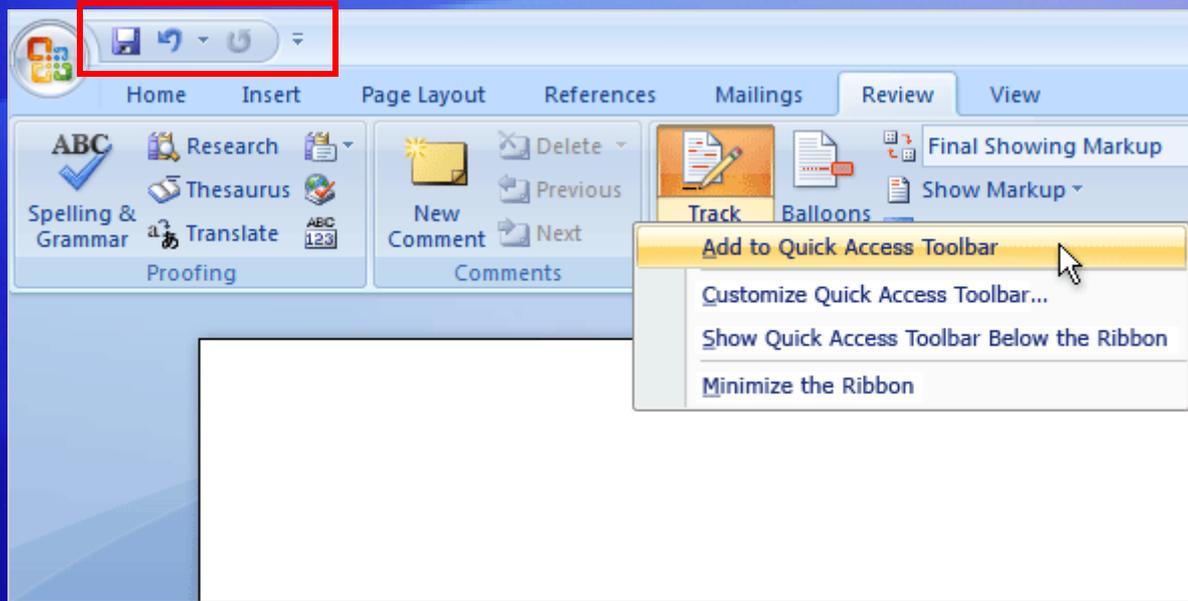
The Quick Access Toolbar is the small area to the upper left of the Ribbon.

It contains the things that you use over and over every day: **Save**, **Undo**, and **Repeat**.

Animation: Right-click, and click **Play**.

You can also add your favorite commands to the Quick Access Toolbar so that they're available no matter which tab you're on.

The Quick Access Toolbar



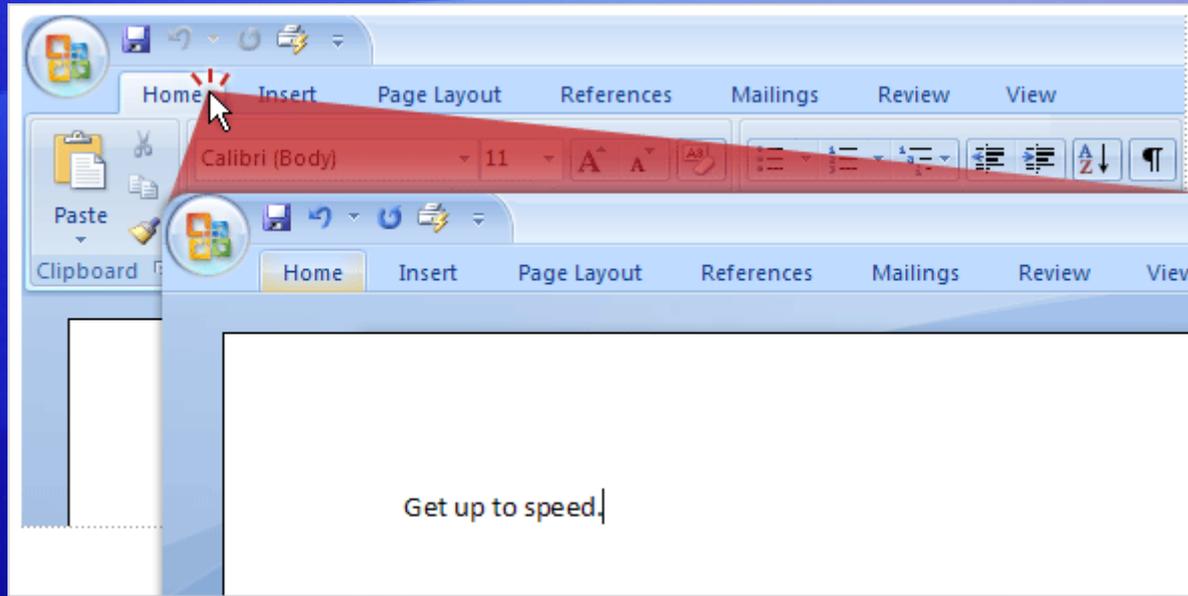
The Quick Access Toolbar is the small area to the upper left of the Ribbon.

It contains the things that you use over and over every day: **Save**, **Undo**, and **Repeat**.

The picture show how you can add your favorite other commands to the Quick Access Toolbar so that they're available no matter which tab you're on.

You can also remove buttons from the Quick Access Toolbar.

Temporarily hide the Ribbon



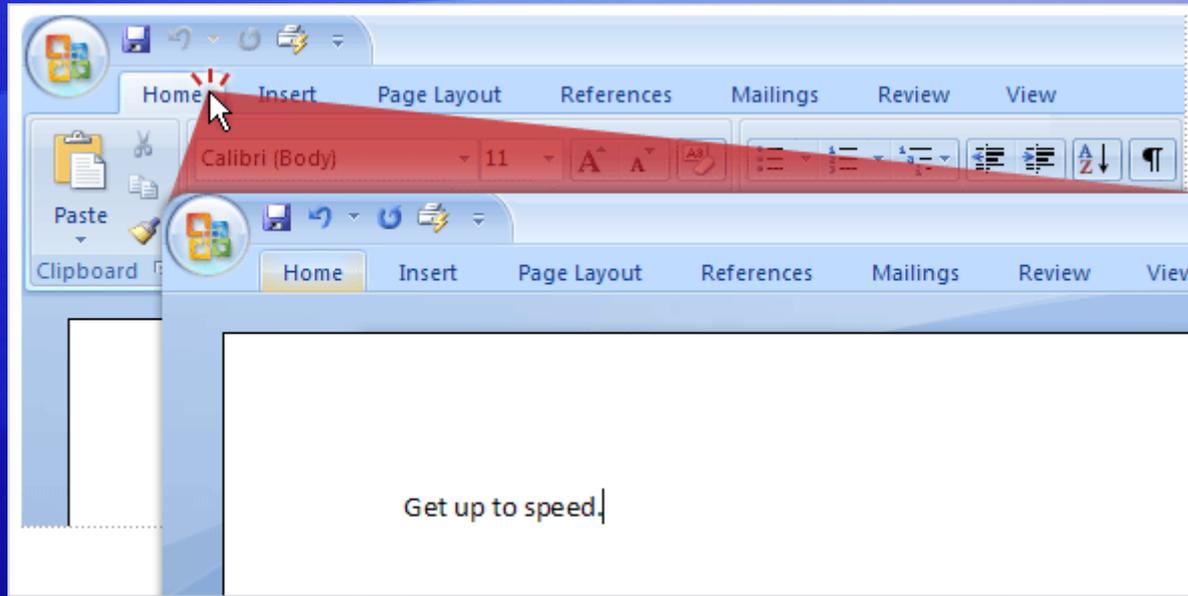
The Ribbon makes everything nicely centralized and easy to find.

But sometimes you don't need to find things. You just want to work on your document, and you'd like more room to do that.

In that case, it's just as easy to hide the Ribbon temporarily as it is to use it.

Get up to speed

Temporarily hide the Ribbon



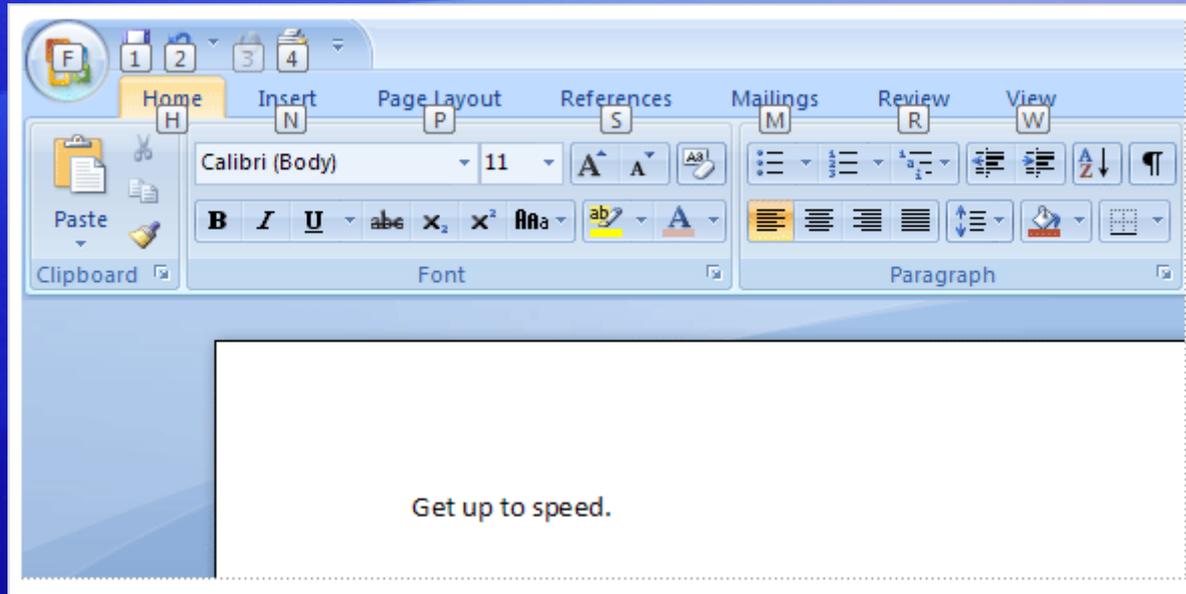
The Ribbon makes everything nicely centralized and easy to find.

Here's how:

1. Double-click the active tab. The groups disappear so that you have more room.
2. To see all the commands again, double-click the active tab again to bring back the groups.

Get up to speed

Use the keyboard



Okay, keyboard people, these slides are for you.

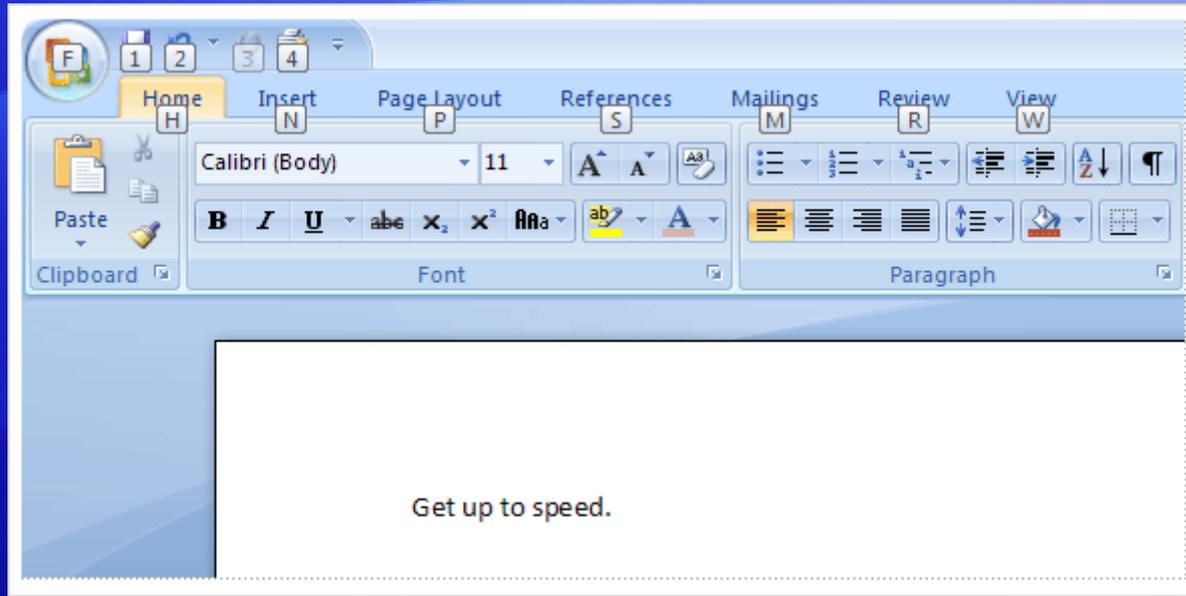
The Ribbon design comes with new shortcuts.

This change brings two big advantages over previous versions of Office programs:

- There are shortcuts for every single button on the Ribbon.
- Shortcuts often require fewer keys.

Get up to speed

Use the keyboard



The new shortcuts also have a new name: **Key Tips**.

To use Key Tips, start by pressing ALT.

Next:

1. Press the Key Tip for the tab you want to display. For example, press H for the **Home** tab. This makes all the Key Tips for that tab's commands appear.
2. Press the Key Tip for the command you want.

Get up to speed

Use the keyboard

What about the old keyboard shortcuts?

- Shortcuts that start with the CTRL key remain the same as in previous versions of Word.
 - Examples include CTRL+C for copy and CTRL+ALT+1 for Heading 1.
- You can still use the old ALT+ shortcuts that accessed menus and commands in previous versions of Word.
 - However, because the old menus are not available, you'll have no screen reminders of what letters to press. So you'll need to know the key sequence by heart in order to use a shortcut.

Suggestions for practice

1. Use the Ribbon.
2. Make additional tabs appear, and then insert a picture and work with the Picture Tools.
3. Work with the Mini toolbar.
4. Use the Quick Access Toolbar.
5. Hide groups and commands.
6. Use keyboard shortcuts.

[Online practice](#) (requires Word 2007)

Test 1, question 1

If you click this button  in Word 2007, what happens? (Pick one answer.)

1. You temporarily hide the Ribbon so that you have more room for your document.
2. You apply a bigger font size to your text.
3. You see additional options.
4. You add a command to the Quick Access Toolbar.

Test 1, question 1: Answer

You see additional options.

Often a dialog box will appear, and it may look familiar from previous versions of Word.

Test 1, question 2

Where is the Quick Access Toolbar and when should you use it? (Pick one answer.)

1. It is in the upper-left corner of the screen, and you should use it for your favorite commands.
2. It floats above your text, and you should use it when you need to make formatting changes.
3. It is in the upper-left corner of the screen, and you should use it when you need to quickly access a document.
4. It is on the **Home** tab, and you should use it when you need to quickly launch or start a new document.

Test 1, question 2: Answer

It is in the upper-left corner of the screen, and you should use it for your favorite commands.

It's the small toolbar with the **Save**, **Undo**, and **Repeat** buttons. You can add your favorite commands by right-clicking a command and choosing **Add to Quick Access Toolbar**.

Test 1, question 3

The Mini toolbar will appear if you do which of the following?
(Pick one answer.)

1. Double-click the active tab on the Ribbon.
2. Select text.
3. Select text and then point at it.
4. Any of the above.

Test 1, question 3: Answer

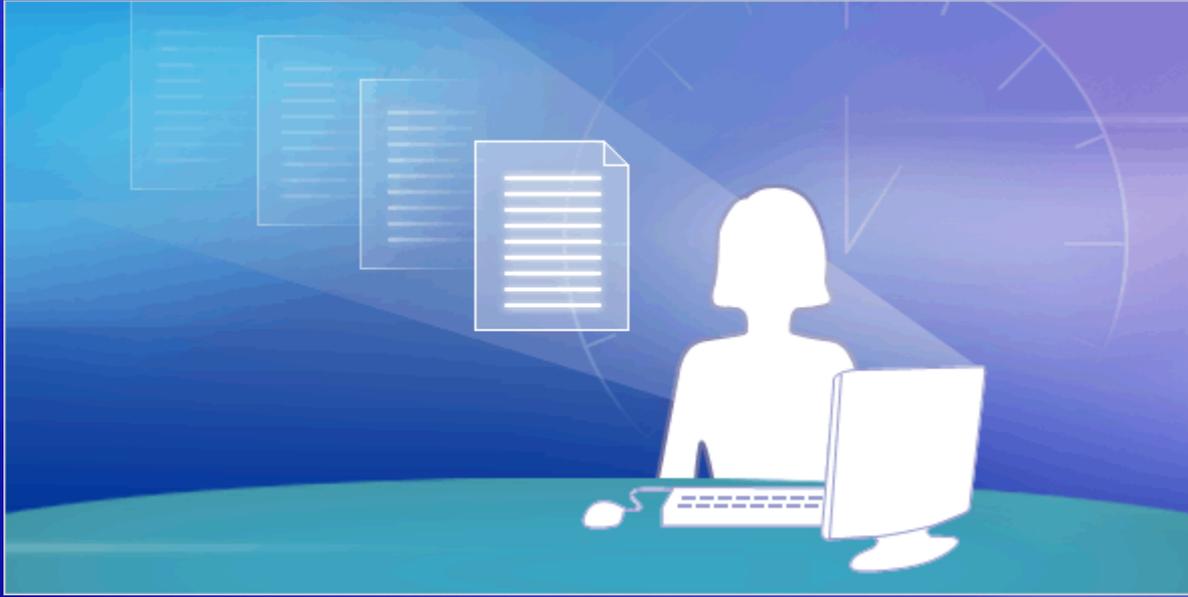
Select the text and then point at it.

It will also appear if you right-click your selected text.

Lesson 2

Find everyday commands

Find everyday commands



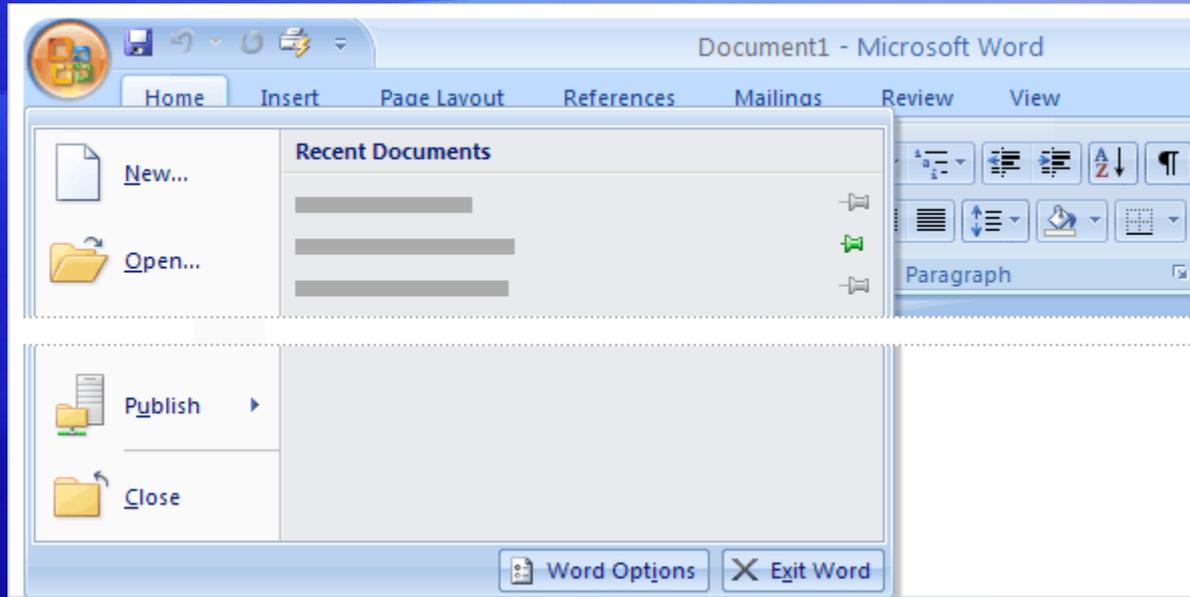
Word 2007 is new, and that's exciting. But you have things to do.

So now it's time to find out the exact locations of the most commonly used commands.

For example, where do you create a document? Where are the bullets, the styles, and the spelling checker? What about printing?

This lesson will show that the new program design puts those commands right where you need them.

Start with the Microsoft Office Button



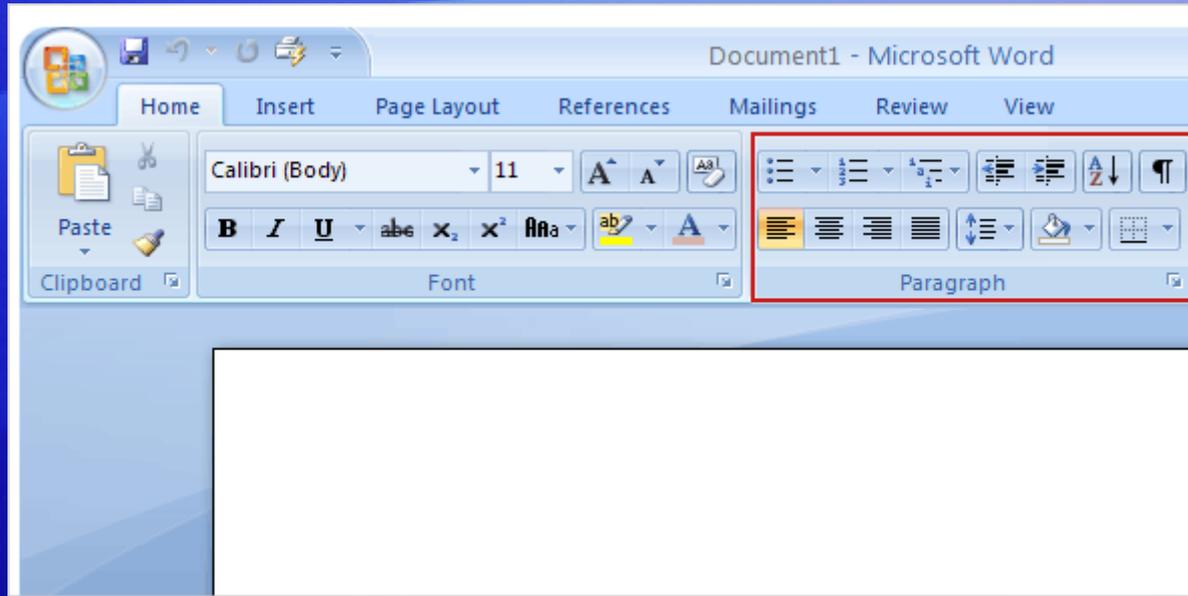
What happened to the **File** menu?

Press the **Microsoft Office Button** to find out.

The **Microsoft Office Button**  is now the place to start in Word.

When you press it, a menu appears that you use to create, open, or save a document.

Bullets, numbers, and more

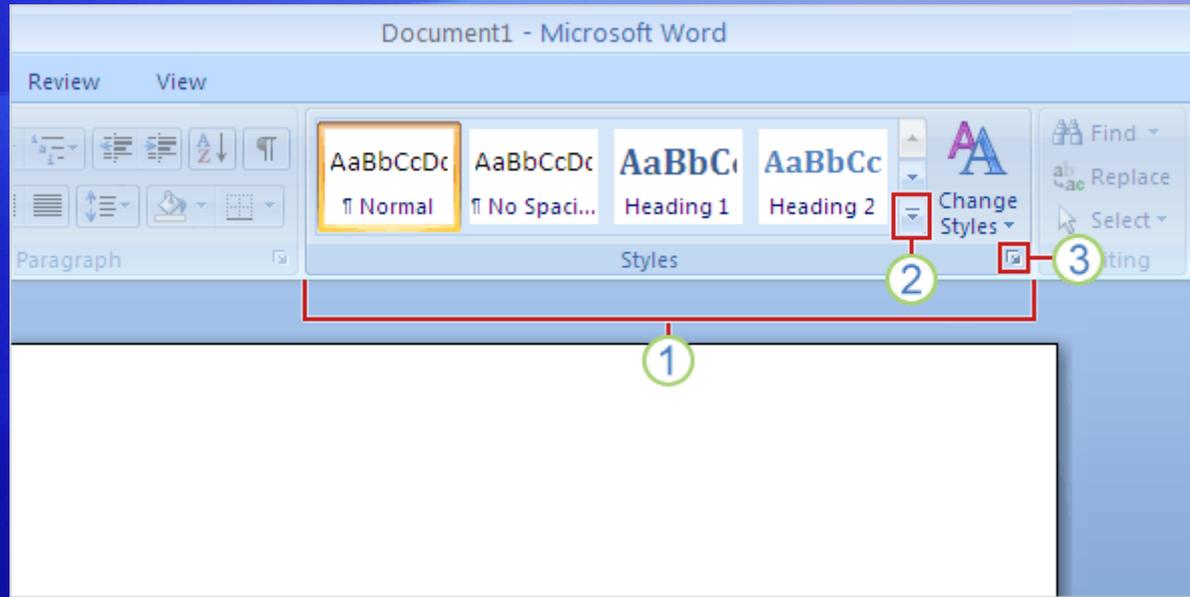


Once you have a document open and have typed your text, you'll no doubt want to format that text.

For example, don't overlook the **Paragraph** group, shown here. It has the ever-popular bulleted lists, numbered lists, and multilevel lists.

Indentation and alignment commands appear here as well.

What about styles?

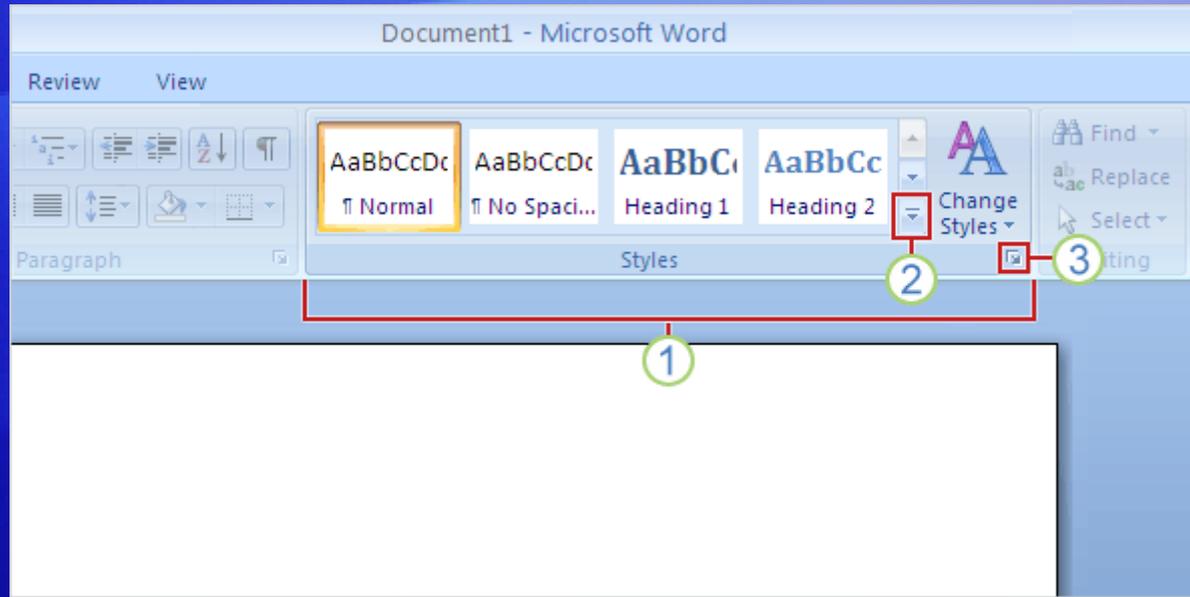


Interested in a more powerful and efficient approach to formatting than just the bold and italic commands?

You'll want to know about styles in the new Word.

You can either choose a ready-made **Quick Style** or apply a style you've made before.

What about styles?

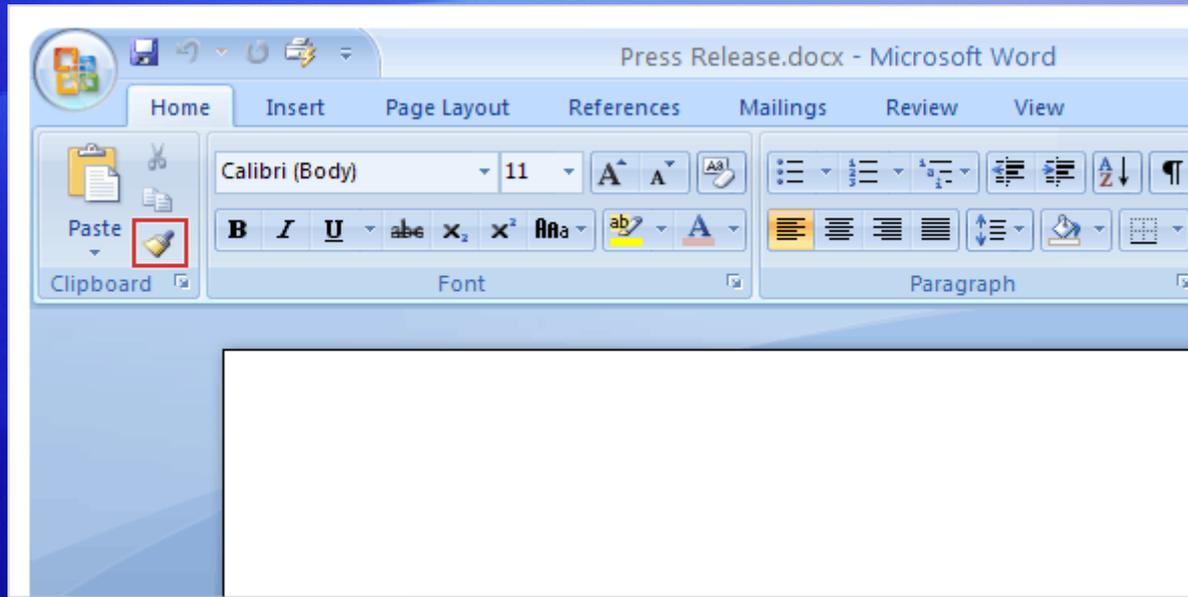


You work with styles on the **Home** tab, in the **Styles** group.

The picture shows how to get the styles you want.

- ① **Quick styles** are ready-made, professional-looking styles that are quick and easy to apply. And they have a new look with this version of Word.
- ② Click this button to see several more ready-to-use Quick Styles.
- ③ Click the Dialog Box Launcher to open the **Styles** pane.

The Format Painter



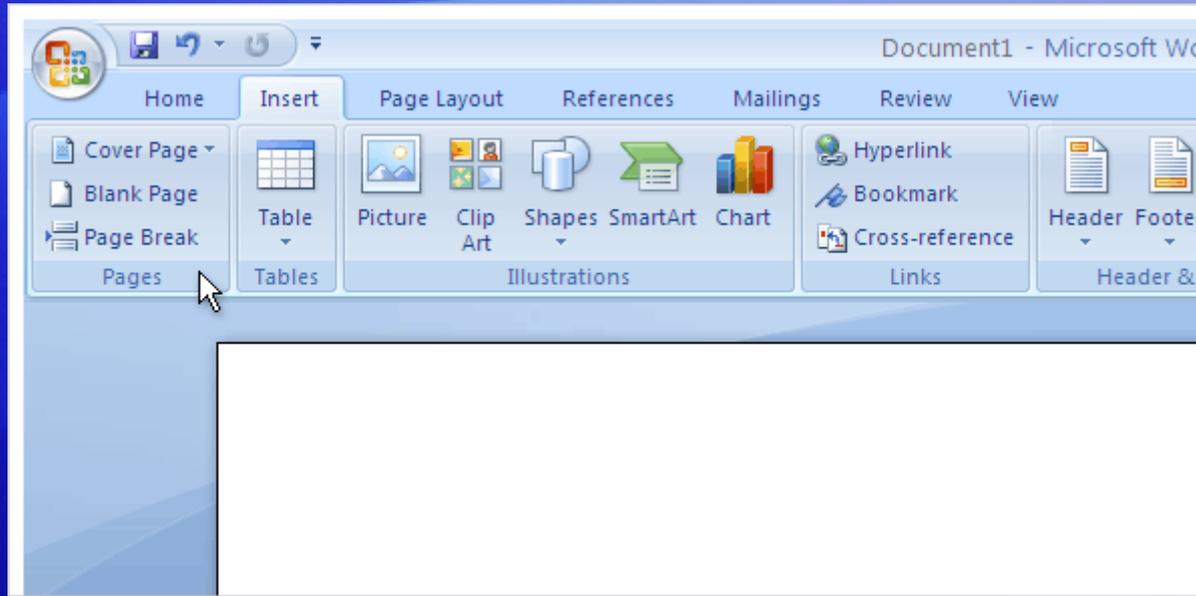
Another high-speed formatting command is **Format Painter**.

It's on the very left of the **Home** tab, in the **Clipboard** group.

In case you're not familiar with the Format Painter, it's a quick way of duplicating formatting from one section of text to another.

To use the Format Painter, place the cursor in the text whose format you want to copy and then click the **Format Painter** button.

Insert pictures, hyperlinks, headers, and footers



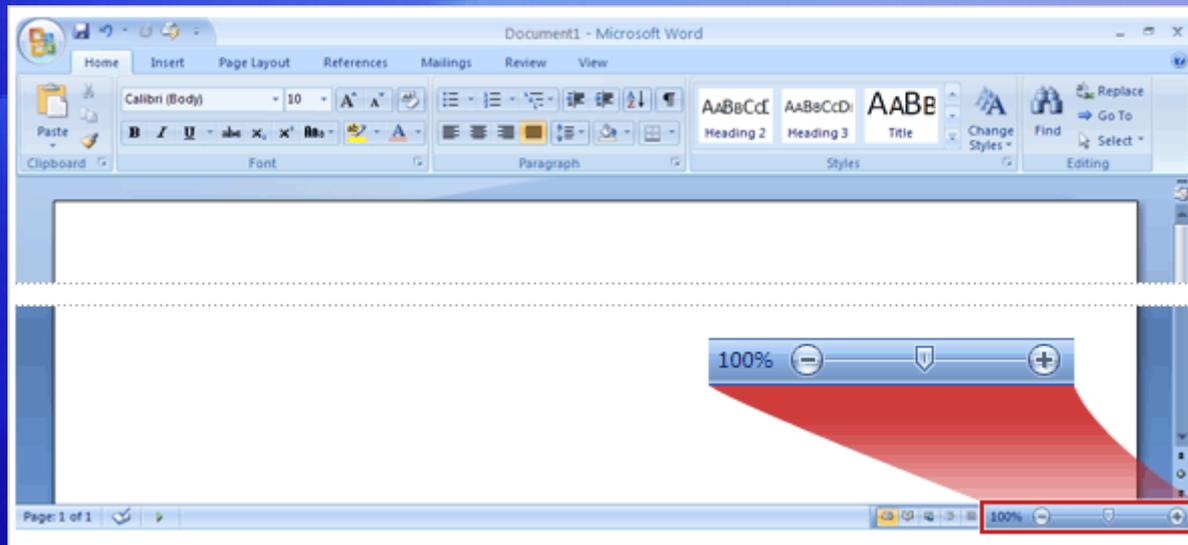
To give your text power and punch, you may want pictures, clip art, charts, or shapes.

The **Insert** tab offers this wealth of added information.

And those aren't the only commands on this tab. You've got **Tables**, **Hyperlink**, **Header**, and **Footer** here too.

That's not all. Not pictured but ready to serve you are page numbers, text boxes, and WordArt.

Zoom

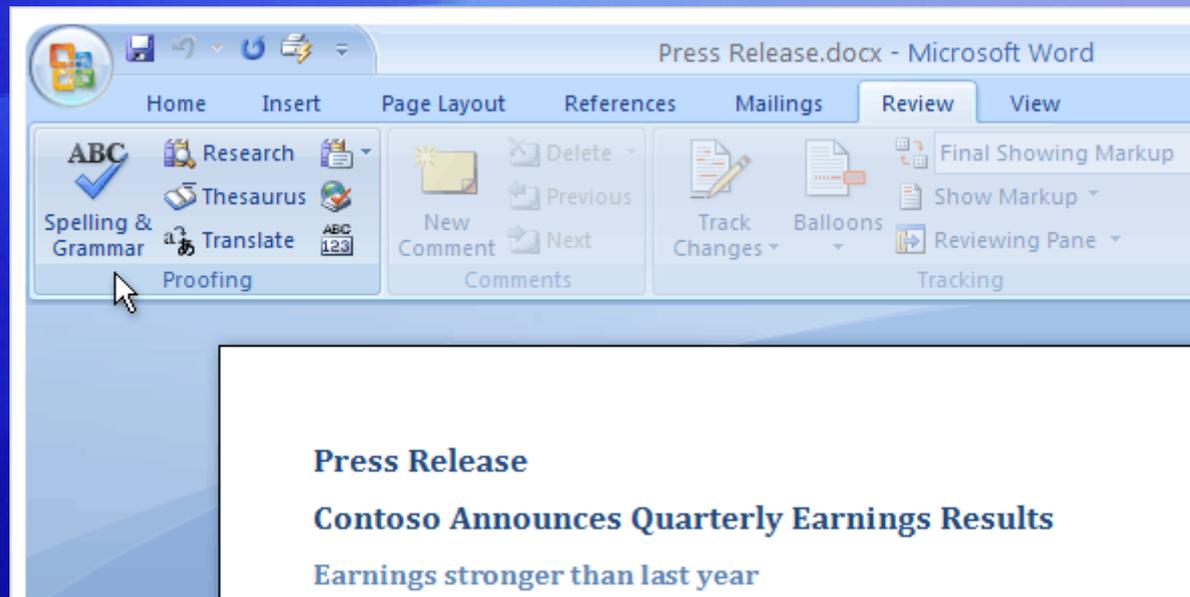


After you insert something, you may need a closer look at the details.

So you'll definitely want to know where to find the zoom control.

Look in the lower-right corner. Drag the slider to the right to zoom in, and drag it to the left to zoom out.

Check your spelling and grammar



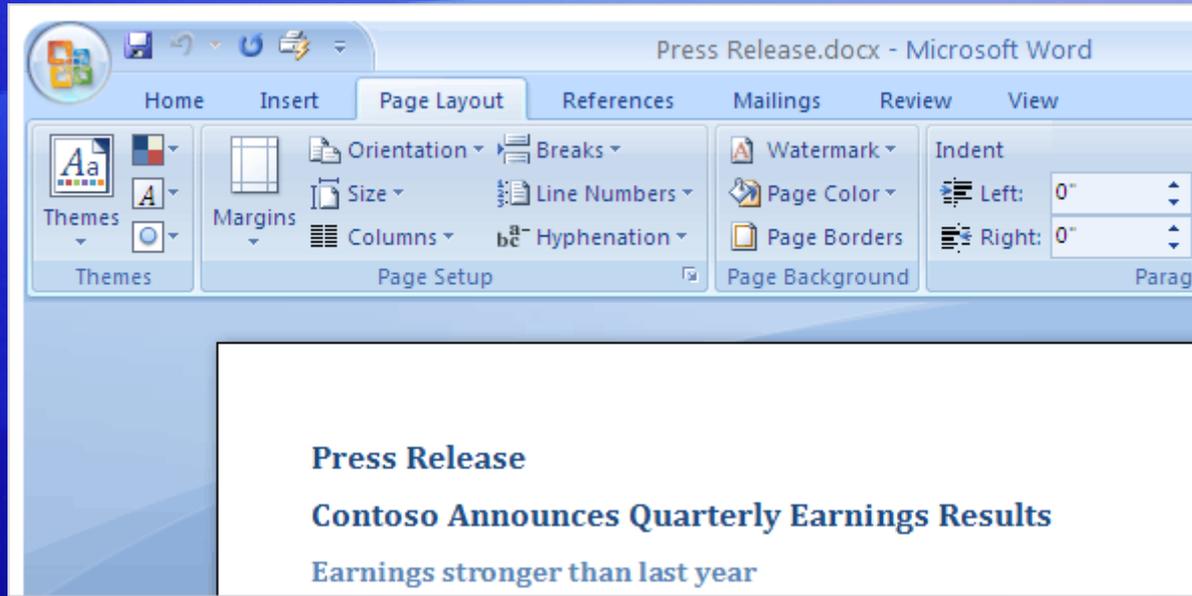
Make no mistake!

When you've done most of the work in your document, you'll want to check spelling and grammar before printing it or sending it in e-mail.

The **Spelling & Grammar** command is on the **Review** tab, because this is part of reviewing your work.

Look toward the far left, in the **Proofing** group.

Ready to print?



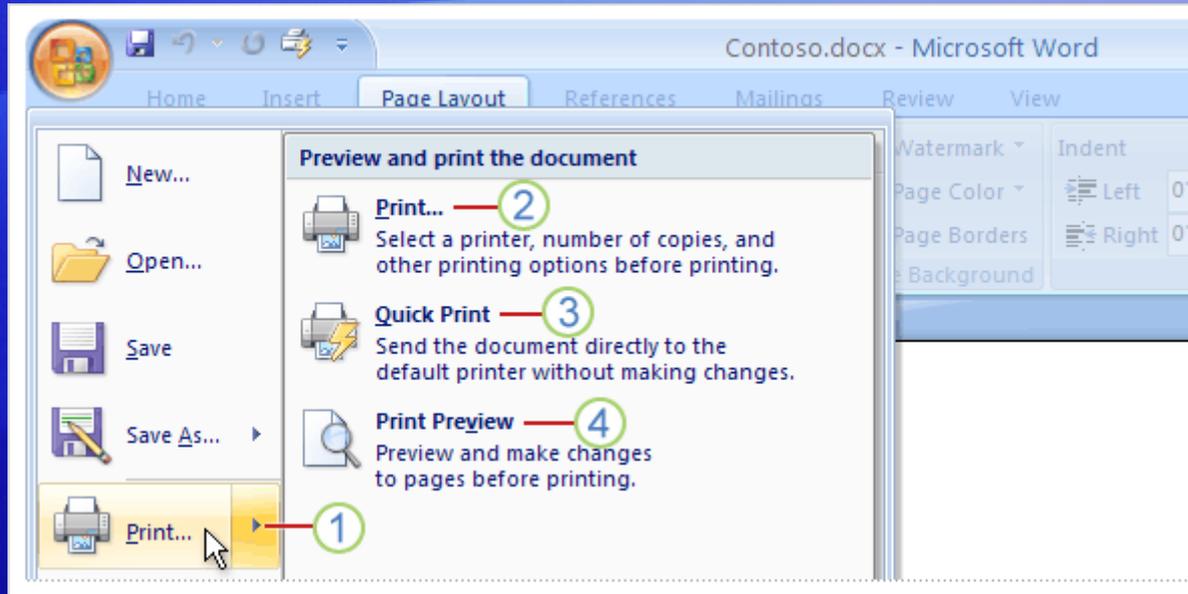
You're ready to print—but are you?

First it's smart to check how your pages are laid out for the printer.

Everything you need is on the **Page Layout** tab.

The **Page Setup** group contains **Size** (8.5 x 11, A4, and so on), **Orientation** (landscape and portrait), and **Margins**.

Yes, ready to print



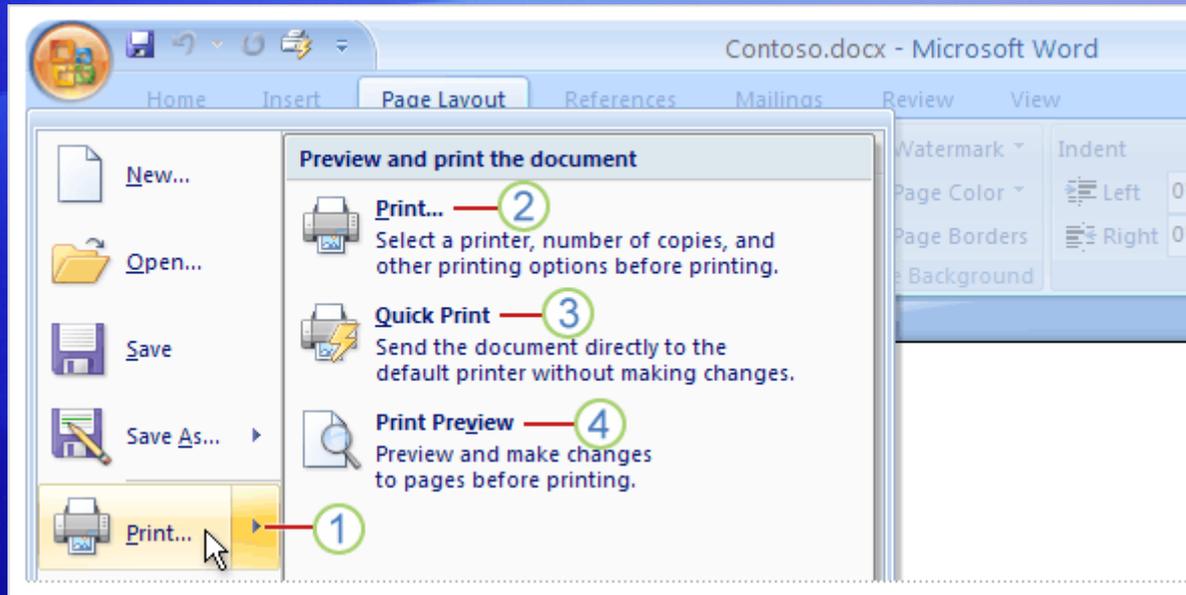
When you're truly ready to print, go back to the **Microsoft Office Button**.

Keep in mind that now you've got options:

- ① If you click the **Print** command, you'll get the **Print** dialog box. But point at the arrow on the right of the **Print** command instead, and you'll see three additional commands.

Yes, ready to print

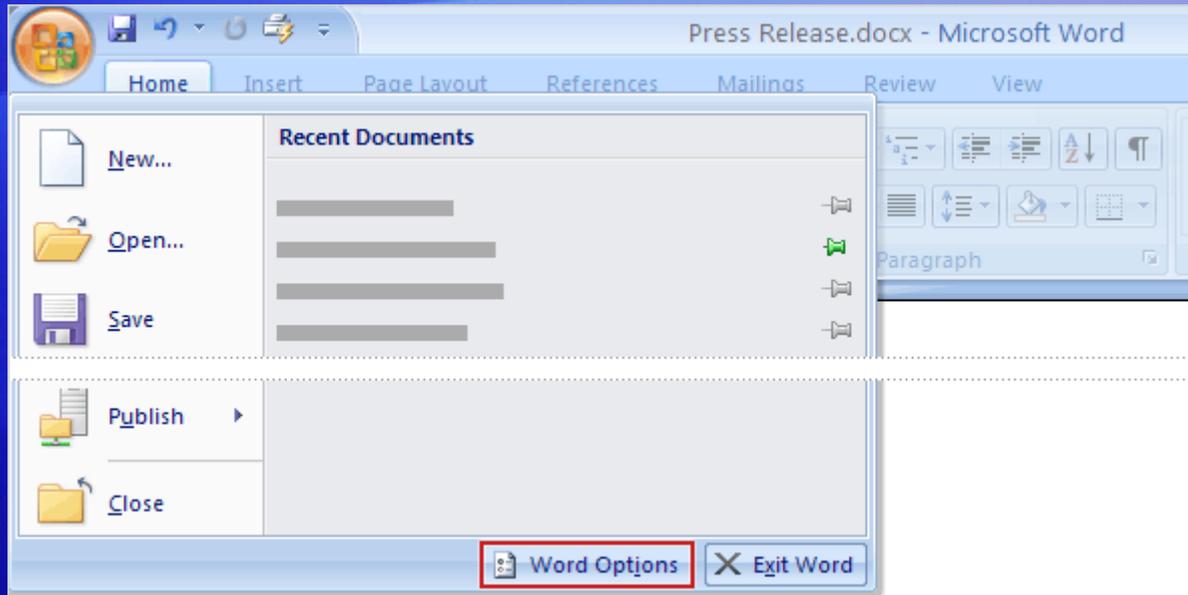
When you're truly ready to print, go back to the **Microsoft Office Button**.



Keep in mind that now you've got options:

- ② **Print**
- ③ **Quick Print**
- ④ **Print Preview**

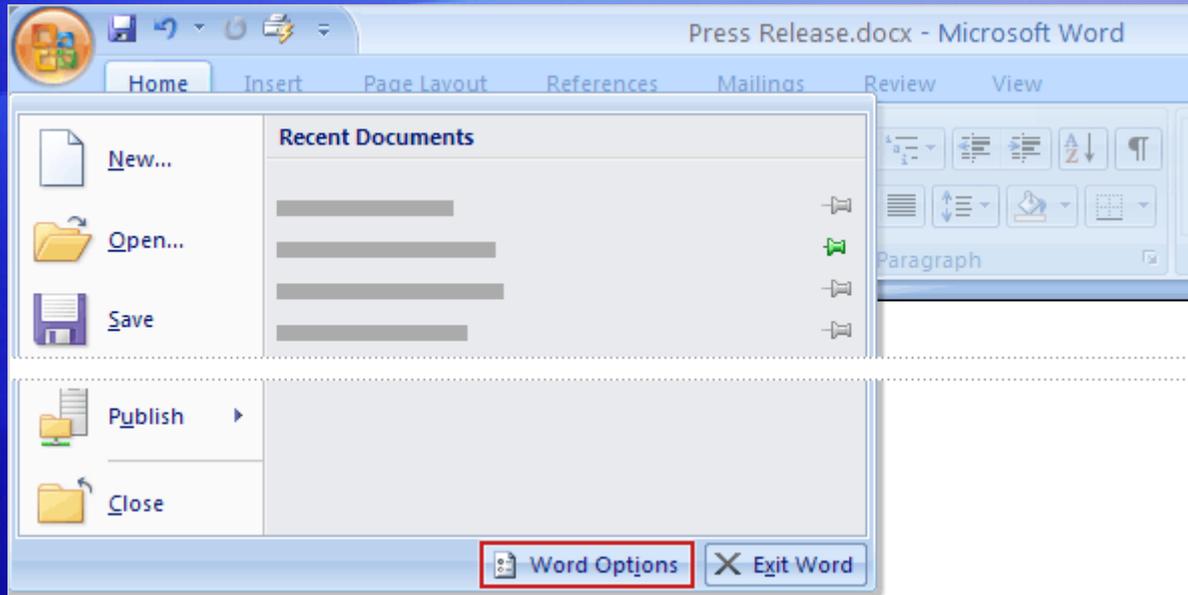
Behind the scenes



All the features you are accustomed to using every day in Word are on the Ribbon and much easier to find than ever before.

So where are the behind-the-scenes settings that aren't about producing documents, but that control how Word works?

Behind the scenes



In previous versions of Word, you clicked **Options** on the **Tools** menu.

Now, all these settings are part of **Word Options**, which you see when you click the **Word Options** button.

It's on the menu that opens when you click the **Microsoft Office Button**.

Suggestions for practice

1. Add a bulleted list.
2. Apply Quick Styles, and then zoom out to see all changes.
3. Change the Quick Style set.
4. Use the Format Painter.
5. Insert a chart by using the **Insert** tab.
6. Make overall changes with the **Page Layout** tab. Then try more tabs.
7. Print in all sorts of ways.

[Online practice](#) (requires Word 2007)

Test 2, question 1

You can apply bulleted lists using commands in which group on which tab? (Pick one answer.)

1. In the **Paragraph** group on the **Page Layout** tab.
2. In the **Paragraph** group on the **Home** tab.
3. In the **Symbols** group on the **Insert** tab.
4. In the **Text** group on the **Insert** tab.

Test 2, question 1: Answer

In the **Paragraph** group on the **Home** tab.

This is where you can apply bulleted lists. Tip: You can also apply bulleted lists by using the Mini toolbar.

Test 2, question 2

How do you choose print options in the new version of Word?
(Pick one answer.)

1. Click the **Print** button on the Ribbon.
2. Click the **Print** button on the Quick Access Toolbar.
3. Use the **Microsoft Office Button**.
4. Either the first or second option above.

Test 2, question 2: Answer

Use the **Microsoft Office Button**.

This is where you open Print Preview as well.

Test 2, question 3

Which corner has the zoom control? (Pick one answer.)

1. Upper-right.
2. Upper-left.
3. Lower-left.
4. Lower-right.

Test 2, question 3: Answer

Lower-right.

In the lower-right corner is the control you use to zoom in and out. You can also use the **View** menu to see the zoom controls.

Lesson 3

A new file format

A new file format



One more big change in the new version of Word: an improved **file format**.

What does that mean to you?

The new file format helps keep your file sizes smaller, and it helps keep them safer. There are other advantages, too.

Get up to speed

Why the change? XML



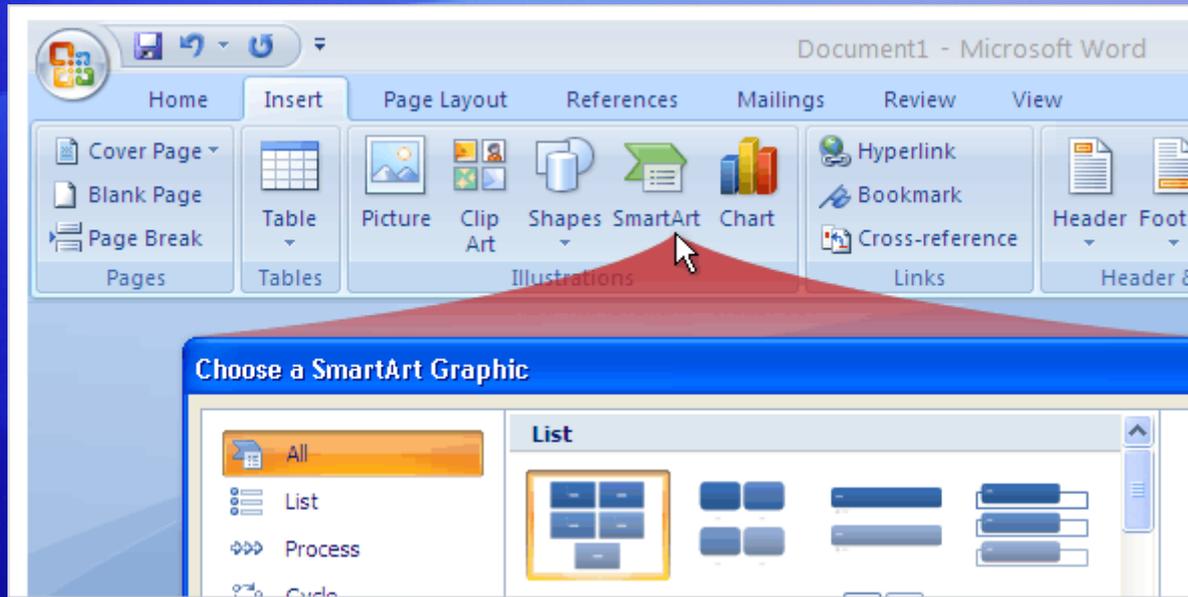
The new Word document file format is based on the new Office Open XML Formats.

The format brings lots of benefits:

- Helps make your documents safer.
- Helps make your document file sizes smaller.
- Helps make your documents less susceptible to damage.

Get up to speed

Why the change? New features

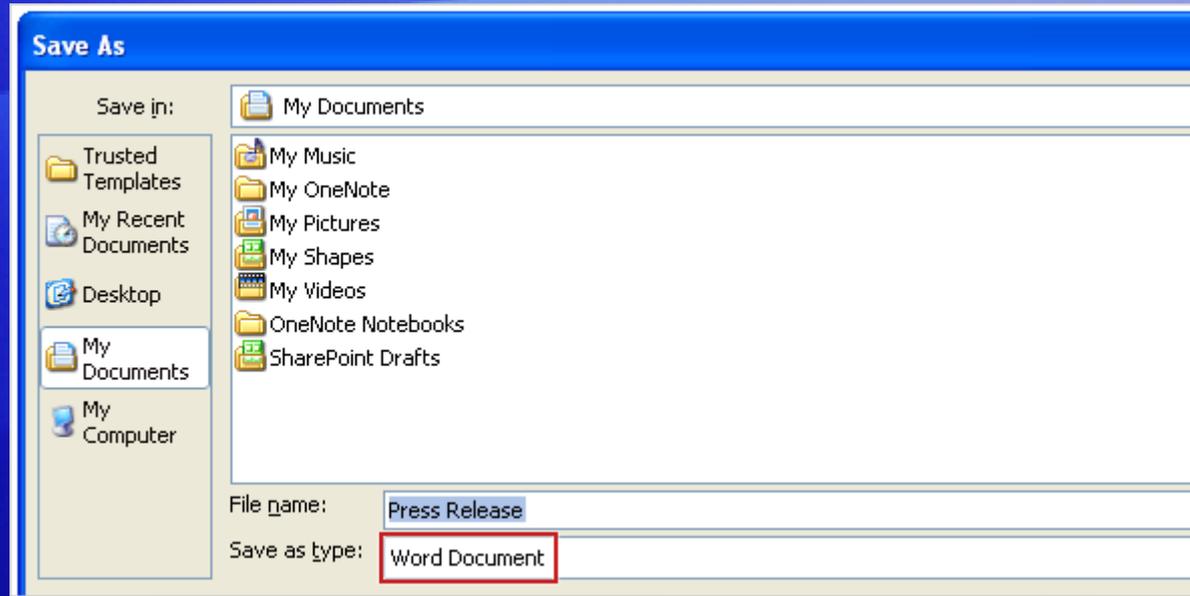


The new file format also gives you the ability to use features that are only available in Word 2007.

One example is the new SmartArt™ graphics feature.

The illustration shows you how to start such a graphic in Word. Notice how many SmartArt graphic designs are available to choose from.

How do I know I'm using the new format?



When you create a new document in Word 2007, and then save the document, the new file format will automatically be chosen for you.

You can make sure of this by looking closely at the **Save As** dialog box. Notice that the **Save as type** box says **Word Document**. This means the new file format is being used.

There's more than one file format?

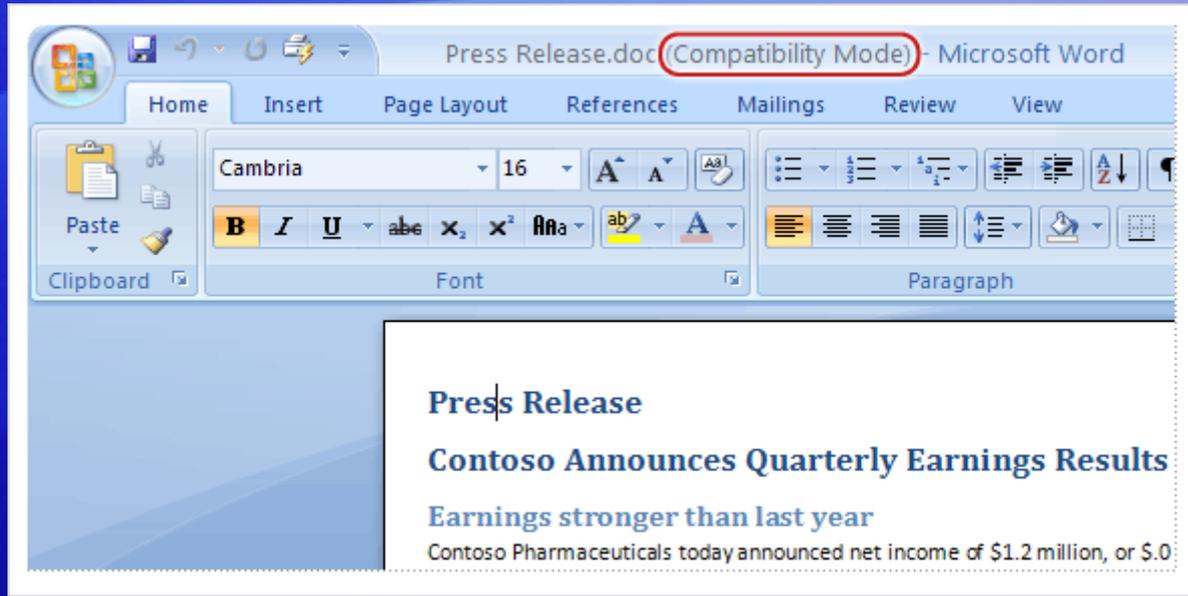
File extension	What it's used for
.docx	Standard Word document with no macros or code
.dotx	Word template with no macros or code
.docm	Word document that could contain macros or code
.dotm	Word template that could contain macros or code

Previously, there were just two Word file types: documents and templates (.doc and .dot).

With Word 2007 there are four file types: .docx, .dotx, .docm, and .dotm (the “x” stands for XML and the “m” for macro). Take a look at the table for details.

The only outward difference you are likely to see with new Word file formats is if you use macros or code.

What about the documents I already have?

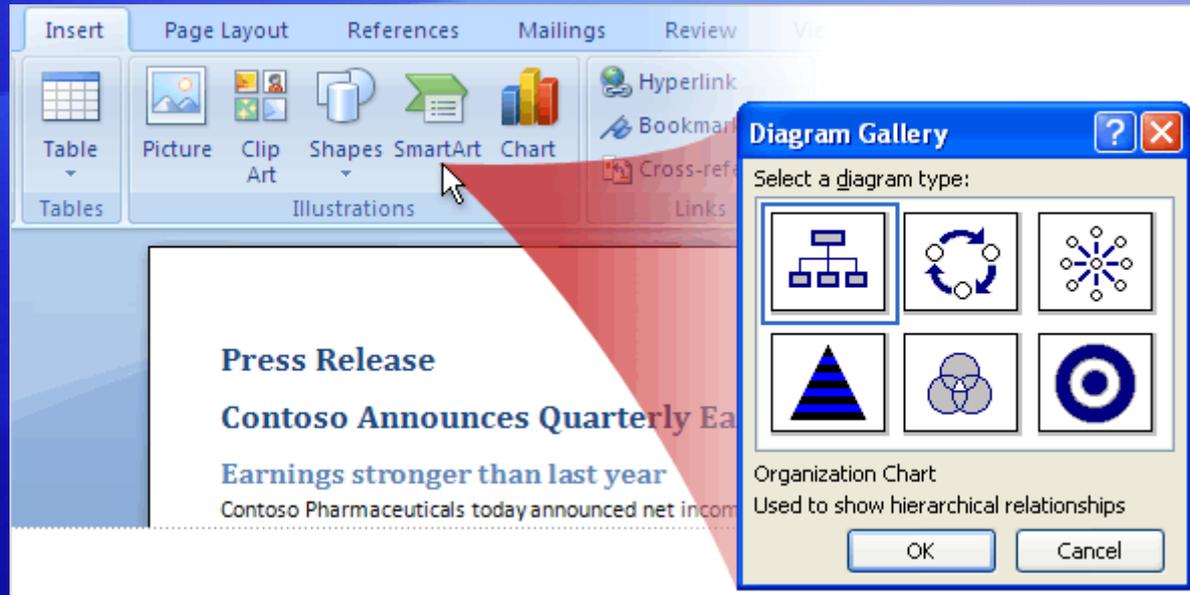


You're probably wondering, "What happens when I open my older documents in the new version of Word?"

Word 2007 can open files created in all previous versions of Word, 1.0 through 2003.

Word opens older documents in **compatibility mode**. You know this because at the top of the document "**(Compatibility Mode)**" appears next to the file name.

Compatibility mode

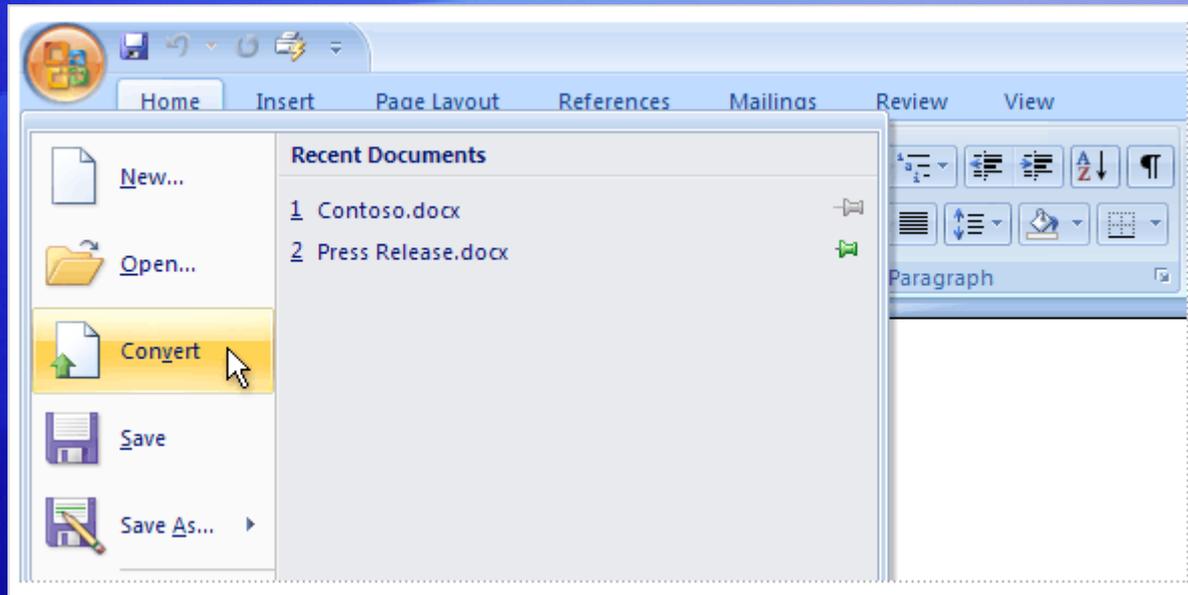


What's compatibility mode all about?

In short, Word is telling you that the document uses an older file format.

Because that file format doesn't understand some of the new features in the new version of Word, those features are either turned off or modified so that they approximate an older version of Word.

Converting your old files



Can you convert an older document to the new file format?

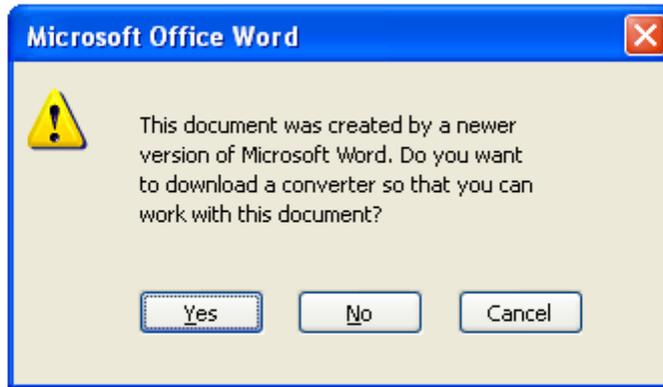
Naturally.

With the document open in Word 2007, you just click the **Microsoft Office Button**, and then click the **Convert** command on the menu.

This conversion offers the benefits of the new format (helps create smaller, more secure files, and so on) and also the new features with their full, undiminished capabilities.

Get up to speed

Share documents using a converter

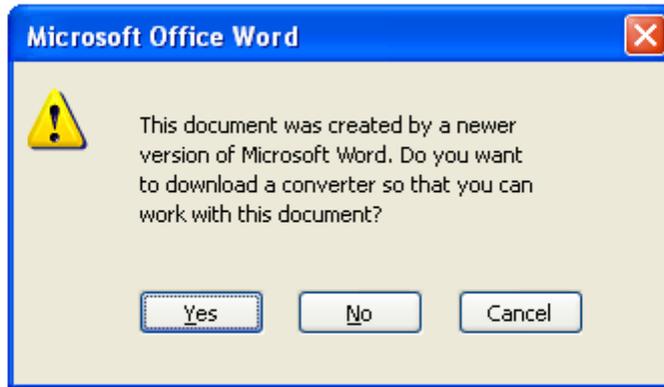


If you'll be sharing documents, there are conversion methods you'll want to know about.

Here's a common scenario that involves a **converter**.

Start by supposing that you're using the new file format, either by creating and saving new documents or by upgrading older documents by using the **Convert** command on the menu that opens from the **Microsoft Office Button**.

Share documents using a converter



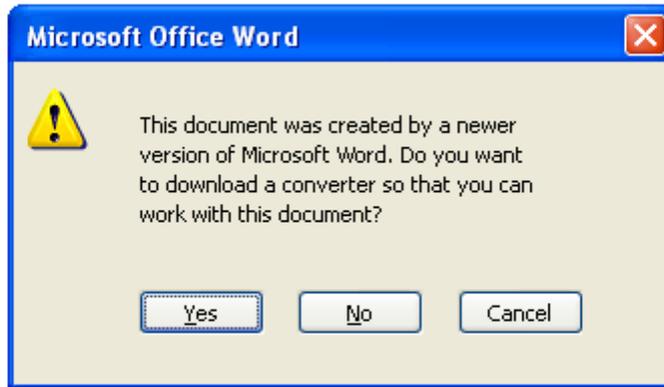
If you'll be sharing documents, there are conversion methods you'll want to know about.

Here's a common scenario that involves a **converter**.

Your friend John has an older version of Word that came with Office 2000. You want to use e-mail to send him your latest document. Will he be able to open it?

Yes. When John clicks the document, the message shown here will ask if he wants to download a converter that will let him open your document.

Share documents using a converter



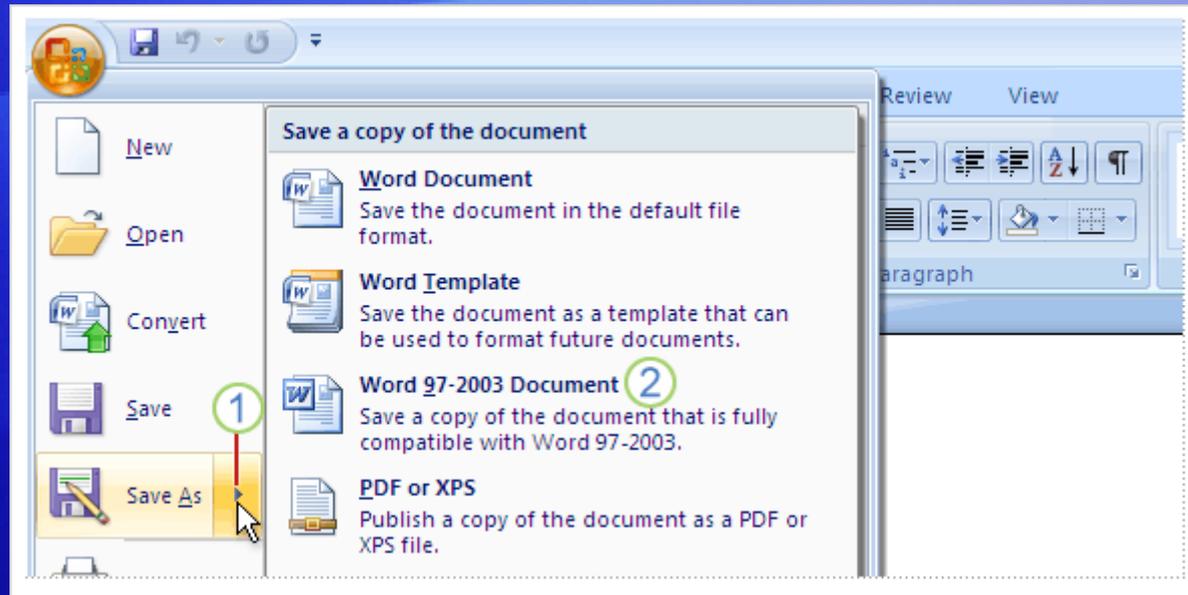
If you'll be sharing documents, there are conversion methods you'll want to know about.

Here's a common scenario that involves a **converter**.

The document John opens won't look *exactly* the same as the one you made, because there are many features in your new version of Word that don't exist in his version.

Still, he can open it, and will be able to work with it and send it back to you.

Share documents by saving with an older format



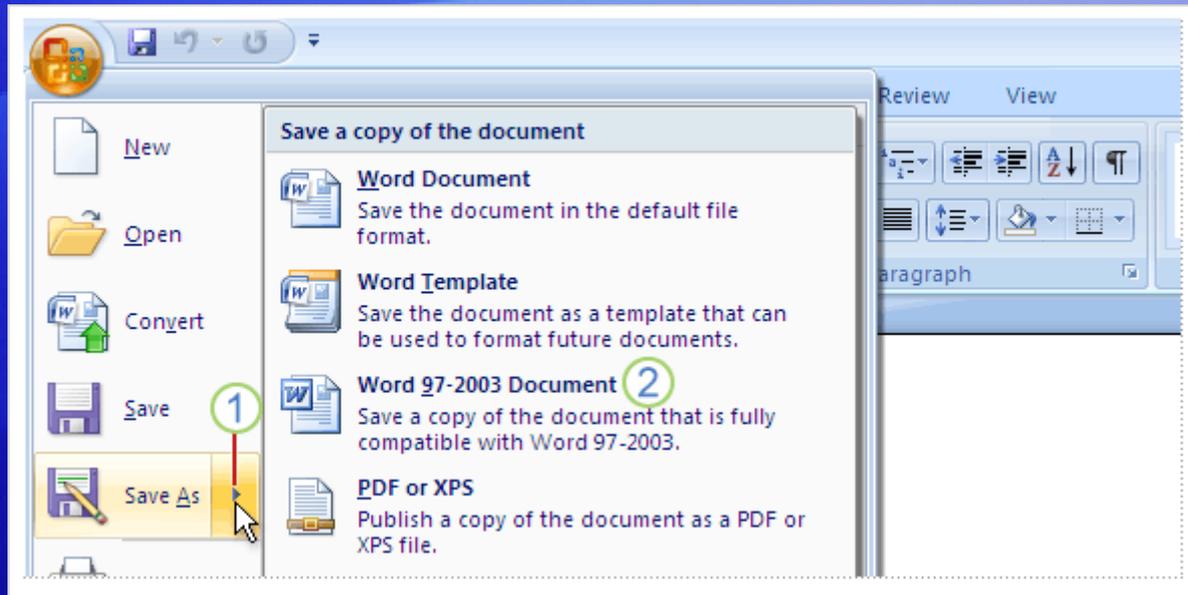
Concerned that John doesn't have his installation of Office 2000 fully updated?

Save your document with an older file format before sending it to him.

Here's how:

- 1 Click the **Microsoft Office Button**, and on the menu, point to the arrow at the end of the **Save As** command.
- 2 Click **Word 97-2003 format** in the list of options.

Share documents by saving with an older format



You may get a warning that saving in the older file format will cause certain features to be lost or modified.

For example, if your document contains a new diagram, Word will notify you that the diagram will be combined into a single, uneditable object. That way John can at least see the diagram. But John won't be able to edit it, because his version of Word doesn't understand how to work with this new feature.

Test 3, question 1

In the title bar of your Word document, it says, “Marketing report.doc (Compatibility Mode).” What does this mean? (Pick one answer.)

1. You can work with the document, but you can't save it.
2. You can't work with the document, because it's not compatible.
3. You can work with the document using all the new Word features.
4. You can work in the document, but Word will limit some new features.

Test 3, question 1: Answer

You can work with the document, but Word will limit some new features.

The document is in the older file format and does not understand the new features in Word. So those features are limited or disabled.

Test 3, question 2

Your friend sent you a Word 2000 document in an e-mail message. Can you open it in the new version of Word? (Pick one answer.)

1. Yes, but you'll get a warning telling you to get a converter.
2. Yes, but the document will open in compatibility mode.
3. Yes, if you first turn on compatibility mode with the Quick Access Toolbar.
4. No, only files from Word 2002 and later can be opened in the new version of Word.

Test 3, question 2: Answer

Yes, but the document will open in compatibility mode.

Some features will be limited because you are working with an older file format.

Test 3, question 3

What happens if you click the Convert command on the menu that opens from the Microsoft Office Button? (Pick one answer.)

1. Word upgrades the existing file to the new file format and renames the file from “document.doc” to “Upgraded: document.doc.”
2. Word upgrades the existing file to the new file format and turns on the new features available in the new version of Word.
3. Word limits its features to be compatible with the document’s file format.
4. Word opens the document in a safe, read-only state so that you can view in the new file format.

Test 3, question 3: Answer

Word upgrades the existing file to the new file format and turns on the new features available in the new version of Word.

And if you have Windows configured to show file extensions, you'll see that the extension changes from .doc to .docx.

Quick Reference Card

For a summary of the tasks covered in this course, view the [Quick Reference Card](#).

JohnRouda.com presents:

Microsoft® Office Word 2007 Training

**Headers and footers for
document sections**

Course contents

- Overview: Documents with different parts
- Lesson: Varying your headers and footers

The lesson includes a list of suggested tasks and a set of test questions.

Overview: Documents with different parts



Your Word 2007 document has several parts. How do you apply headers and footers and vary them so they're appropriate to each part?

If your document has a cover page, for example, you may want no page number to show there. And you'd like the headers for each chapter to contain the title for that chapter only.

In this course, you'll see how to tailor your headers and footers to your content.

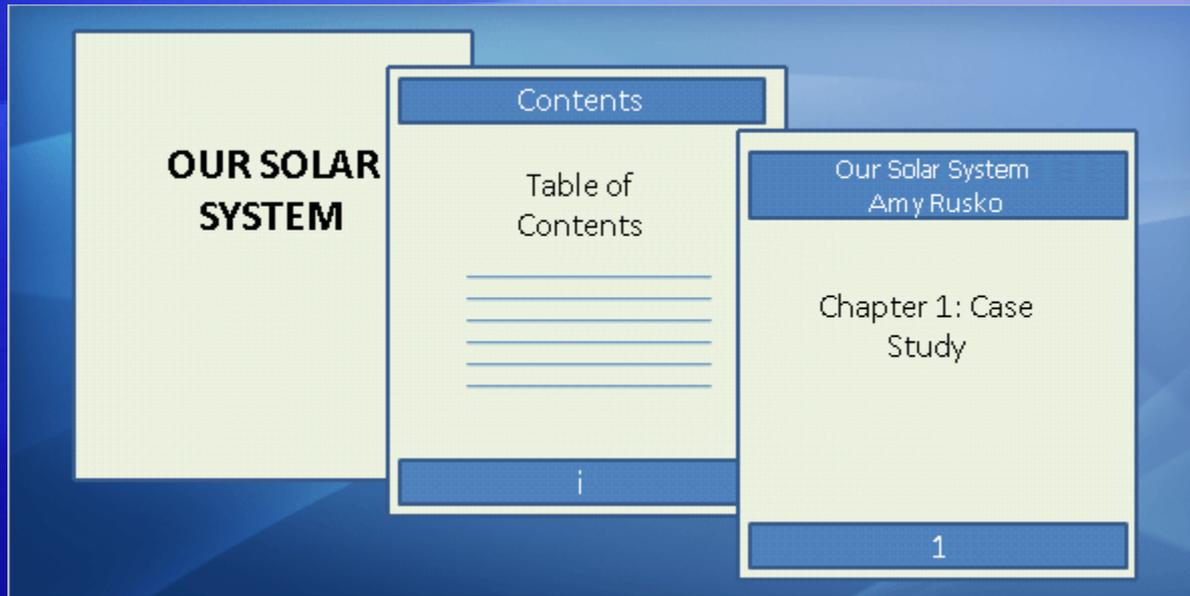
Course goals

- Create document sections by adding section breaks.
- Work within sections to create varied headers and footers.
- Apply a different-first-page setting for headers and footers.
- Create headers and footers for facing pages.

Lesson

Varying your headers and footers

Varying your headers and footers

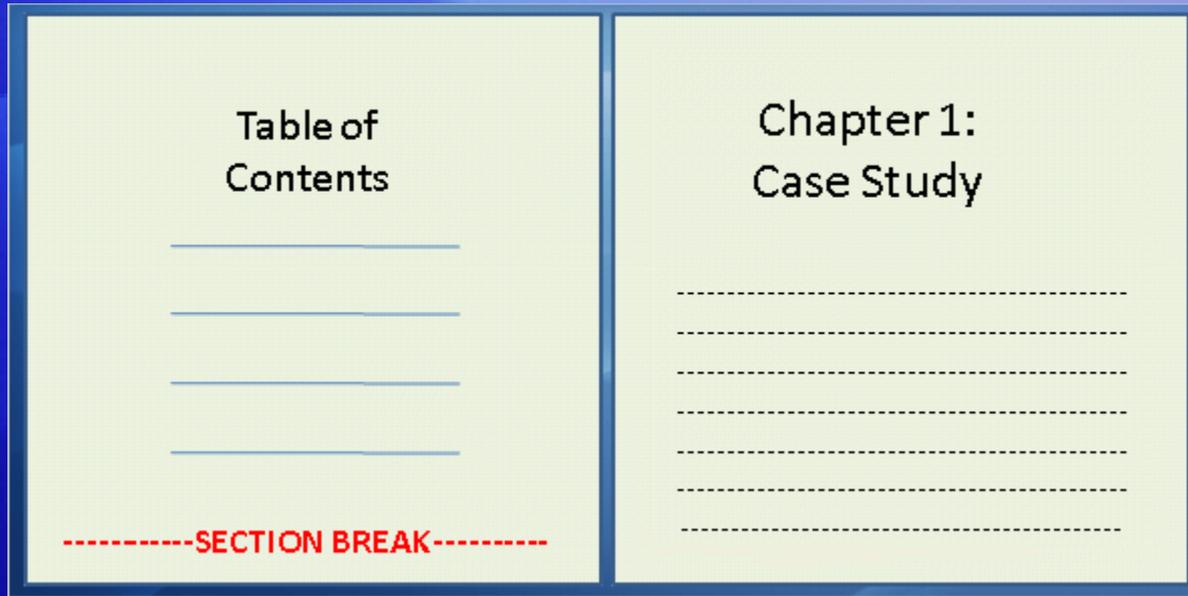


You have a multipart document, and you want to create headers and footers that go with each part.

You already know you can apply a header or footer once and have it appear everywhere.

But for the multipart document, you need more control. How do you get that?

Create different sections

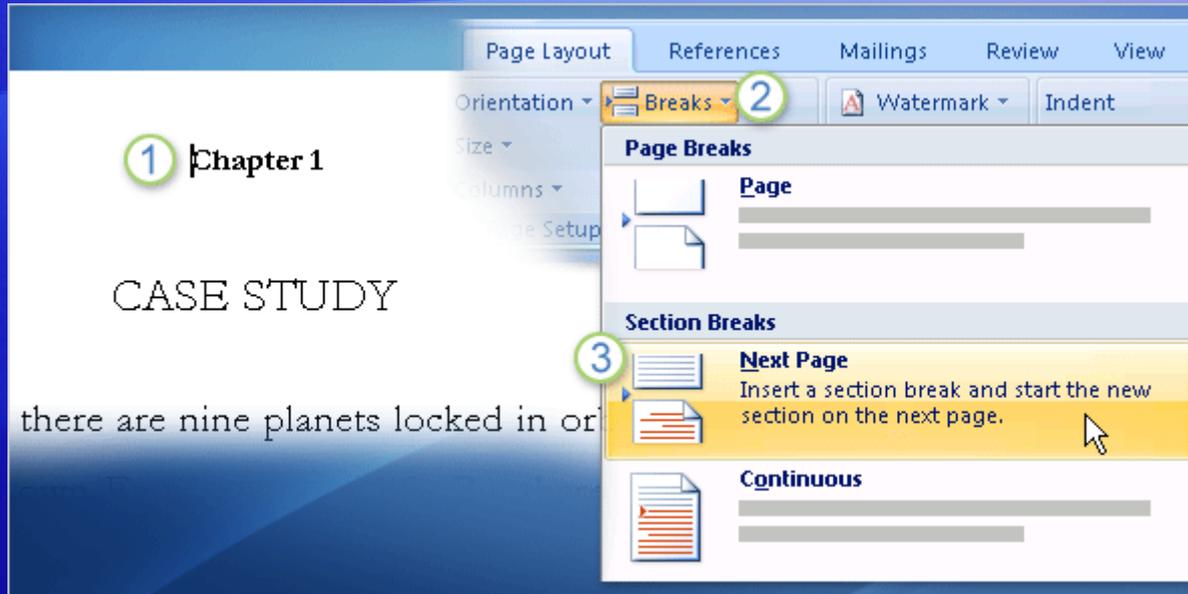


If your document has several parts, and you want unique headers and footers for each part, you first create **section breaks** between the document's parts.

A section break enables you to create a unique page layout for the pages in that section.

With the unique layout established, you can set up the headers and footers the way you want them for that section.

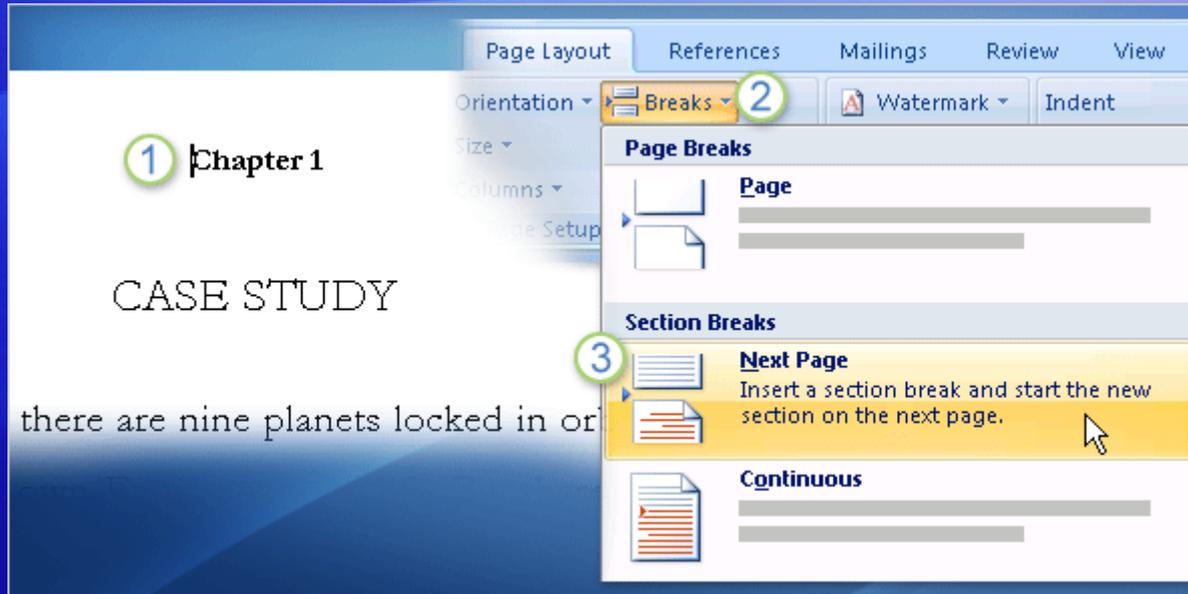
How to create section breaks



You insert section breaks in the main body of the document, not in the header and footer space.

So you'd close the header and footer workspace before doing the steps shown in the picture.

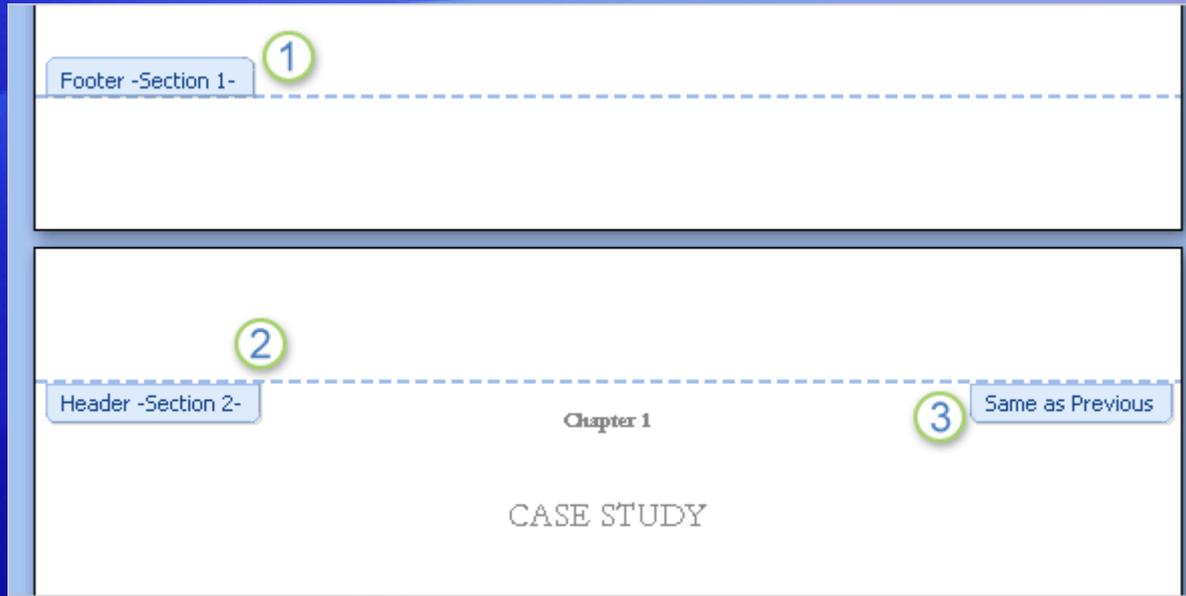
How to create section breaks



You insert section breaks in the main body of the document, not in the header and footer space.

- 1 Place the cursor where you want a new section to start.
- 2 On the Ribbon, click the **Page Layout** tab, and click **Breaks**.
- 3 Under **Section Breaks**, click **Next Page**. Word creates a section break before the position of the cursor.

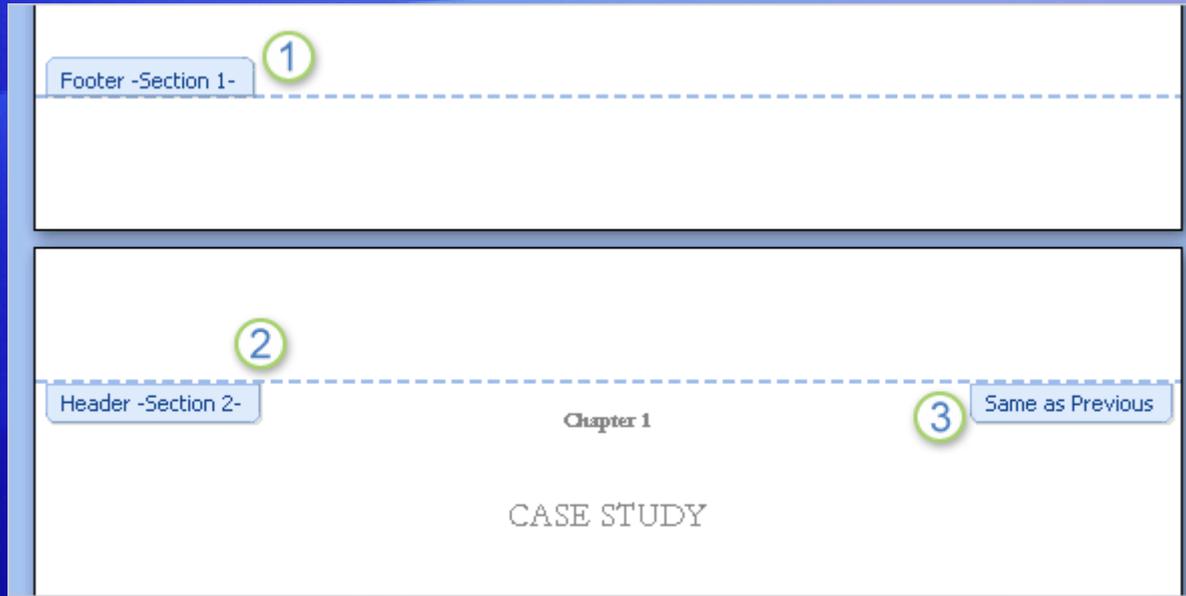
How sections are shown in headers and footers



The section break means that what comes before it is one section, and what's after it is another section.

When you open the header and footer workspace, markers appear there that define the sections and keep you oriented.

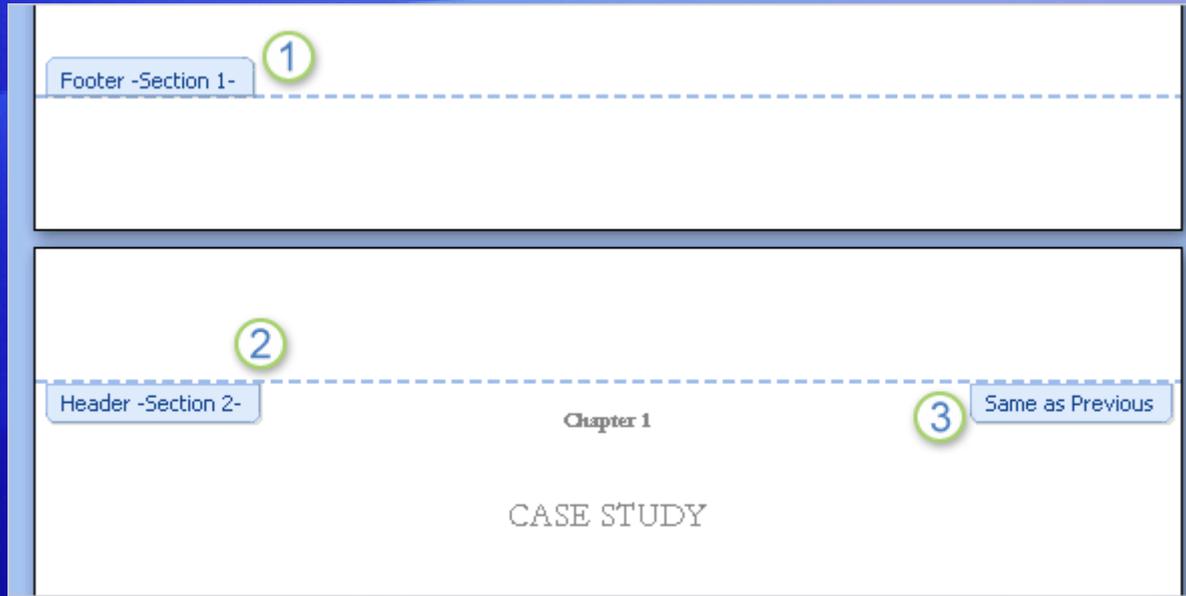
How sections are shown in headers and footers



As the picture shows, the header and footer areas indicate the sections and give each a number.

- ① This footer is at the end of section 1.
- ② The header below is at the start of section 2.
- ③ And you'll notice another tab: **Same as Previous**.

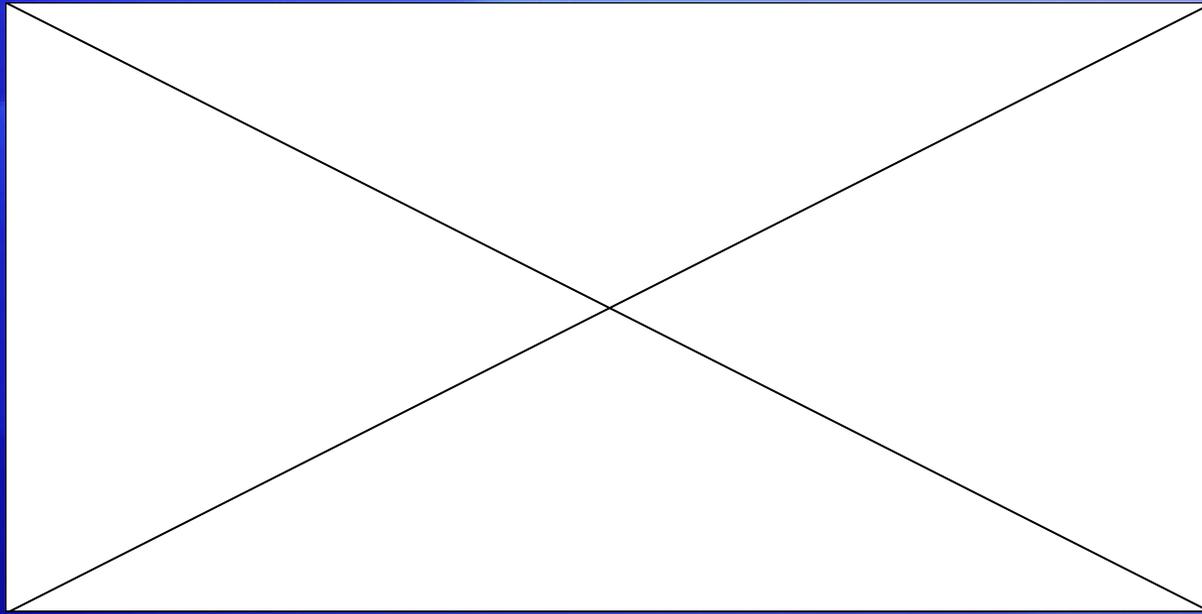
How sections are shown in headers and footers



What does **Same as Previous** mean?

It means that, though you've created distinct sections in the document, you still get the option of having header and footer content carry over between sections.

Create unique text in a header

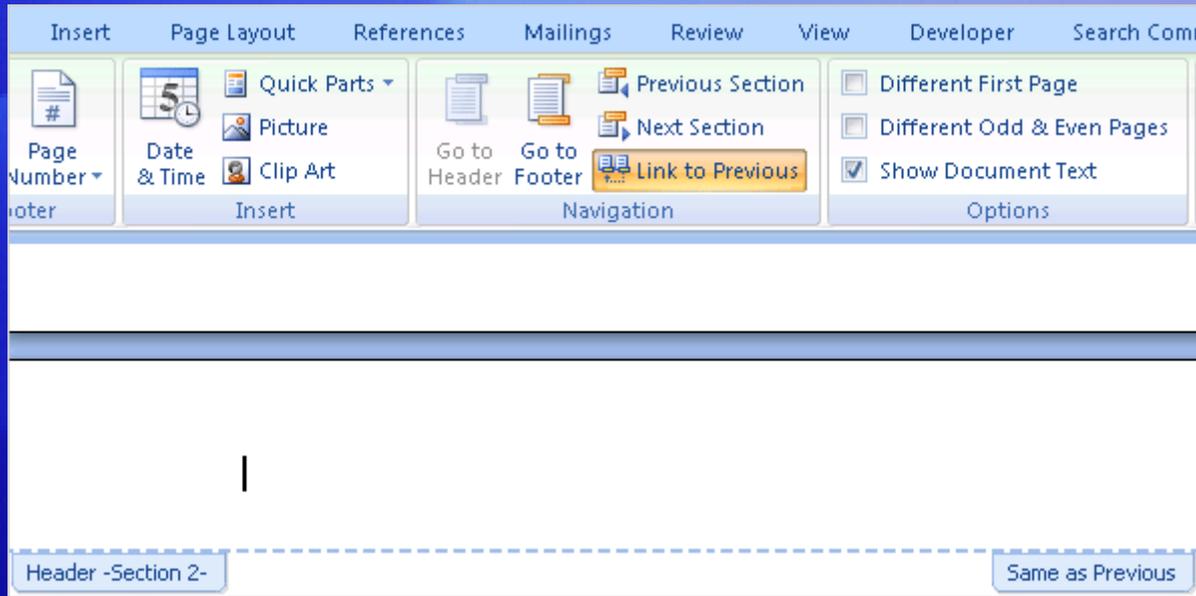


To create unique text in a particular header, you first break the link in the header. This frees the header for content that's unique to the section.

Animation: Right-click, and click **Play**.

First, you place the cursor in the header you want to break the link for. Then, in the **Navigation** group, click **Link to Previous** to turn that setting off.

Create unique text in a header

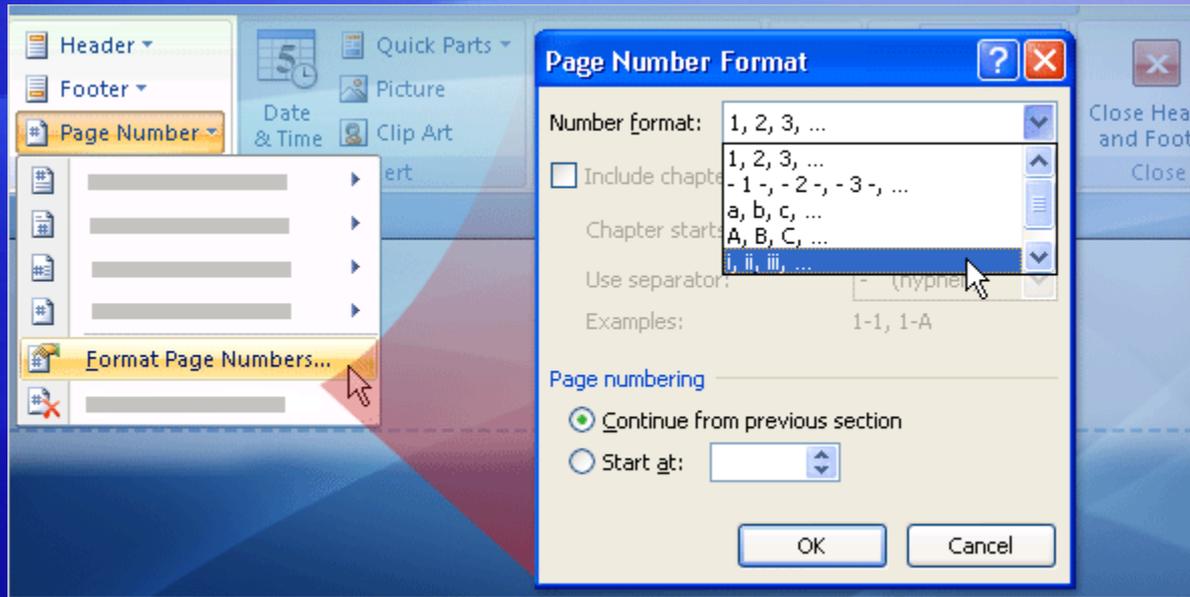


To create unique text in a particular header, you first break the link in the header. This frees the header for content that's unique to the section.

First, you place the cursor in the header you want to break the link for.

Then, in the **Navigation** group, click **Link to Previous** to turn that setting off.

Tips for working with different headers and footers



Keep the following things in mind as you set up unique headers and footers in a document.

- Break links for each document section.
- Break header and footer links separately.
- Mind your page numbering.

Create a different first page



Once you've turned your front matter into its own section, you can subdivide it even further, in case you want nothing in the headers and footers on the cover page.

- 1 Use the **Different First Page** setting, shown here. Selecting this setting enables the header and footer areas to be different from the rest of the pages in the section. You can do this for any section in the document.

Create a different first page



Once you've turned your front matter into its own section, you can subdivide it even further, in case you want nothing in the headers and footers on the cover page.

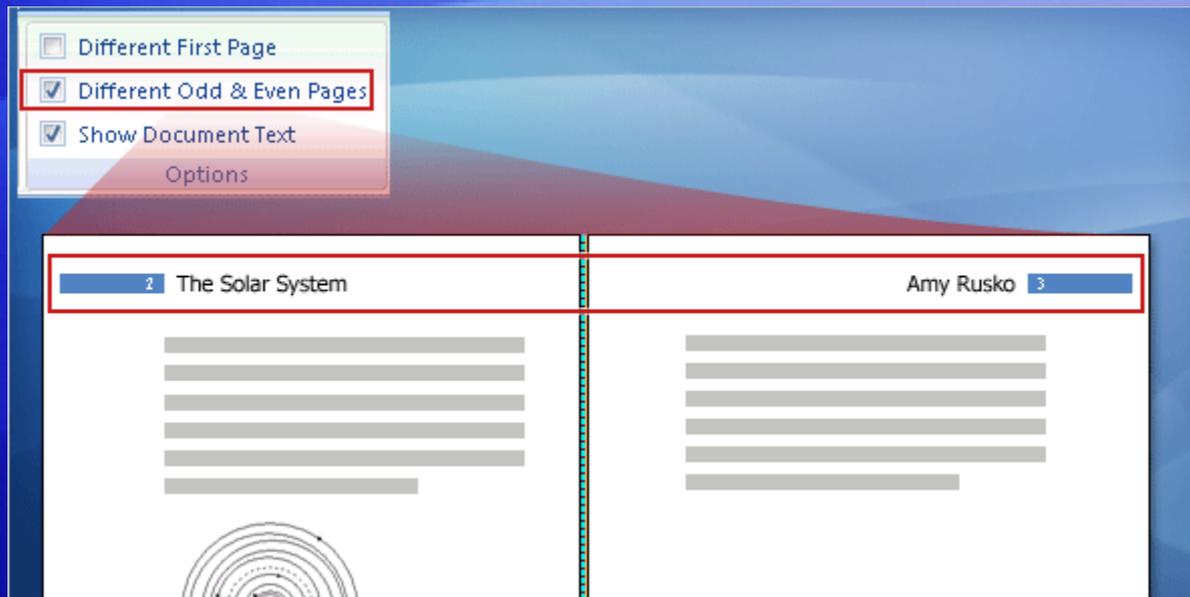
- ② The section's header and footer areas will now have text above them saying "First Page Header" and "First Page Footer." (This appears only in the header and footer workspace.)

Tips for creating a different first page

Tips:

- If you want unique headers and footers only on the first page of your document, you can apply the **Different First Page** setting and dispense with creating sections.
- However, if you intend to include sections, create those before applying the **Different First Page** setting. This setting gets carried over into a new section, which is typically not what you'd want.
- Word has predesigned cover pages that you can insert (you find these on the **Insert** tab). These automatically put the **Different First Page** setting into effect.

Different odd and even pages

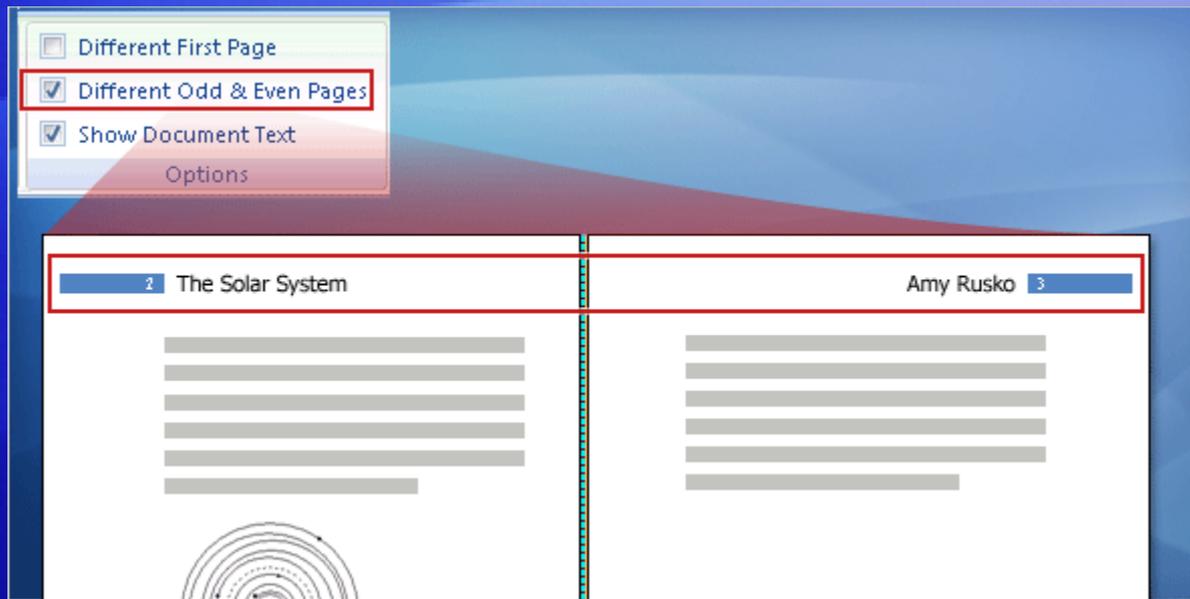


As you use the galleries of designed headers and footers, you'll see that some are set up for odd and even pages, with the content on the outer edge of the page.

To apply headers and footers to odd and even pages, you go through the same process described earlier.

That is, you create document sections, break the links between them, and then add the header and footer content that you want in each section.

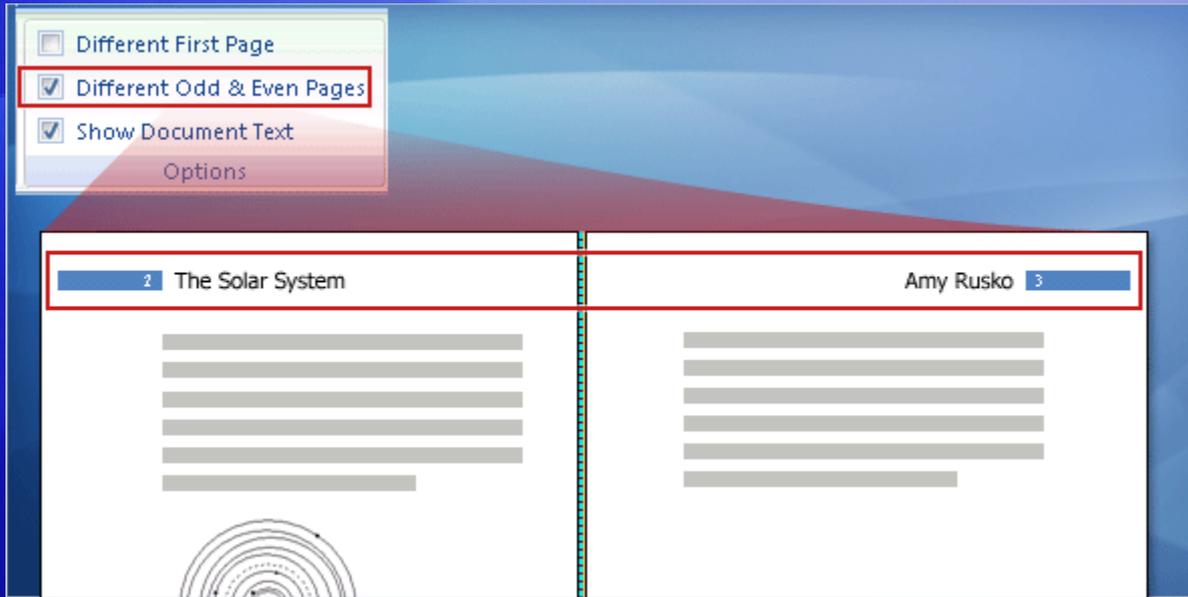
Different odd and even pages



But be sure to note a couple of key points about using this format.

If you want the “odd” or “even” headers or footers to sit at the edges of the margin, as for facing pages, you must turn on the **Different Odd & Even Pages** setting on the **Design** tab before you apply the headers or footers.

Different odd and even pages



But be sure to note a couple of key points about using this format.

And this is a document-wide setting. While you can still create unique header and footer content in document sections, you cannot change the odd, even layout.

Suggestions for practice

1. Create sections in the document.
2. Break the link between sections, and then create a unique header.
3. Create another unique header.
4. Change elements on the cover page.

[Online practice](#) (requires Word 2007)

Test question 1

Why use section breaks? (Pick one answer.)

1. They lay the groundwork for layout variations in different areas of your document.
2. They visually break information from page to page.

Test question 1: Answer

They lay the groundwork for layout variations in different areas of your document.

Section breaks create sections, which are distinct parts of a document. Each section contains a unique set of formatting attributes.

Test question 2

A section break means that any header or footer content you create in that section applies only to that section. (Pick one answer.)

1. True.
2. False.

Test question 2: Answer

False.

The section break is just a first step.

Test question 3

There are page numbers throughout your document, in the footer. You don't want any page numbers on your document's cover page, however. What do you do? (Pick one answer.)

1. Put the cursor in the footer of the cover page, and use the **Remove Footer** command.
2. On the **Design** tab in **Header & Footer Tools**, click **Different First Page**.
3. Select the page number on the cover page and manually delete it.

Test question 3: Answer

On the **Design** tab in **Header & Footer Tools**, click **Different First Page**.

This makes all the footer content on the cover page disappear, and you can leave it blank or add whatever you want there.

Quick Reference Card

For a summary of the tasks covered in this course, view the [Quick Reference Card](#).

JohnRouda.com presents:

Microsoft® Office Word 2007 Training

Bullets, numbers, and lists

Course contents

- Overview: Get the basics
- Simple lists
- Multilevel lists

Each lesson includes a list of suggested tasks and a set of test questions.

Overview: Get the basics



Arranging information in lists can make it far easier to understand.

You probably use lists in your documents every day but don't think about them until something gets complicated. Ever tried pasting one list into another, changing the indentation, or swapping bullet styles?

This course will teach you the ins and outs of bullets, numbers, and multilevel lists in Microsoft Office Word 2007.

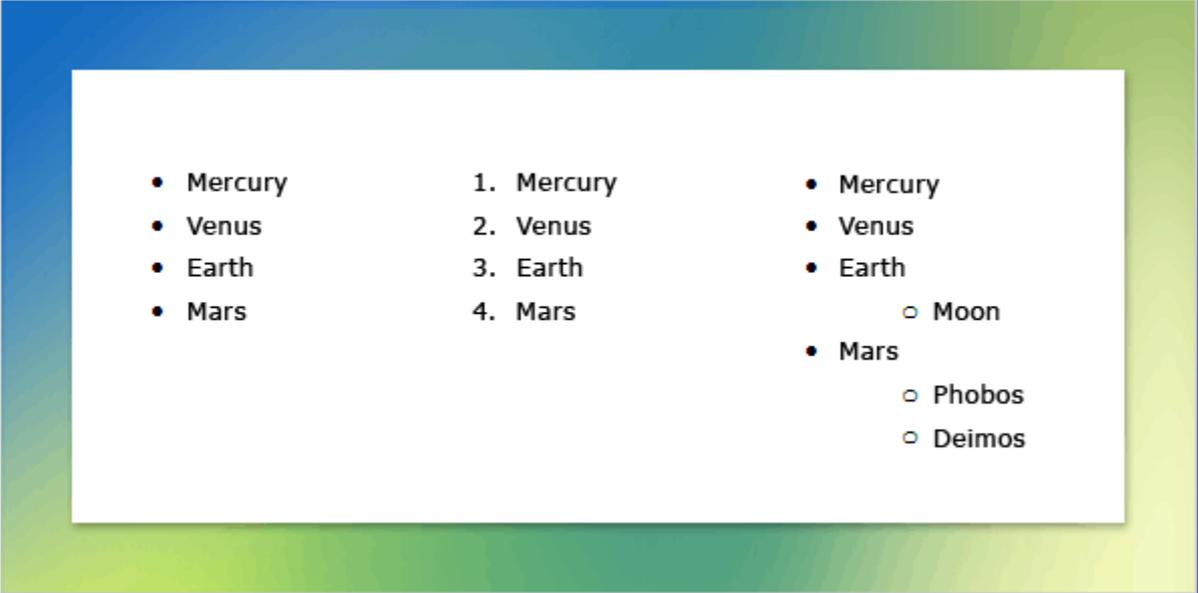
Course goals

- Create a bulleted or numbered list.
- Change the look of a bulleted or numbered list.
- Combine two separate lists.
- Use a multilevel list.

Lesson 1

Simple lists

Simple lists

- 
- Mercury
 - Venus
 - Earth
 - Mars
1. Mercury
 2. Venus
 3. Earth
 4. Mars
- Mercury
 - Venus
 - Earth
 - Moon
 - Mars
 - Phobos
 - Deimos

Lists are a useful component of any document, whether you're summarizing information or making it easier to digest.

Numbered lists are essential for showing a sequence of information. If you're not worried about sequence, a bulleted list might be better.

Lists can be **single-level**, with all the items having the same hierarchy and indentation; or **multilevel**, meaning that there's a list within a list.

Create lists as you type

The diagram illustrates three methods for creating lists in a text editor. Each method is shown in a separate box with a blue arrow pointing from the input to the resulting list.

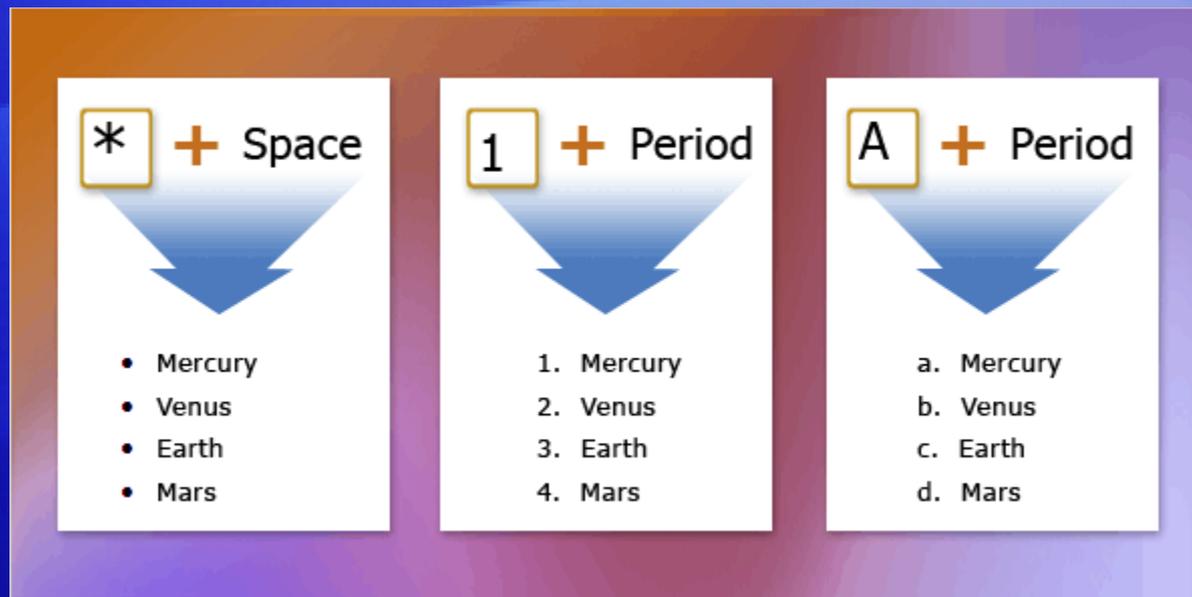
- Bulleted List:** Input: * + Space. Result: A bulleted list with items: Mercury, Venus, Earth, Mars.
- Numbered List:** Input: 1 + Period. Result: A numbered list with items: 1. Mercury, 2. Venus, 3. Earth, 4. Mars.
- Lettered List:** Input: A + Period. Result: A lettered list with items: a. Mercury, b. Venus, c. Earth, d. Mars.

There's more than one way to start a list, but one of the most popular is to create the list automatically as you type.

If you need a bulleted list, just type an asterisk (*) followed by a space. The asterisk turns into a bullet, and your list is started.

When you've finished typing the first item in your list, press ENTER, and a new bullet will appear on the next line.

Create lists as you type



There's more than one way to start a list, but one of the most popular is to create the list automatically as you type.

To automatically create numbered lists, type the number one and a period (1.), followed by a space.

This is new for Word 2007; in previous versions, you had to press ENTER before the list started.

Create lists as you type

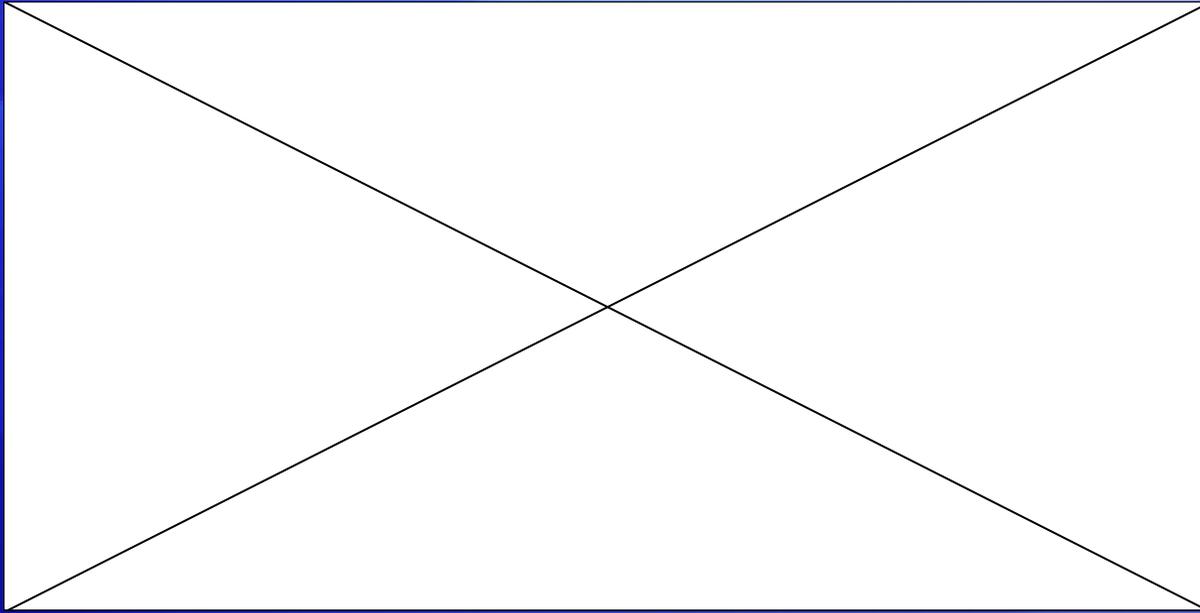
The diagram illustrates three methods for creating lists as you type, each shown in a white box with a blue arrow pointing down to the resulting list.

- * + Space:** This method creates a bulleted list. The resulting list contains: Mercury, Venus, Earth, and Mars.
- 1 + Period:** This method creates a numbered list. The resulting list contains: 1. Mercury, 2. Venus, 3. Earth, and 4. Mars.
- A + Period:** This method creates a lettered list. The resulting list contains: a. Mercury, b. Venus, c. Earth, and d. Mars.

There's more than one way to start a list, but one of the most popular is to create the list automatically as you type.

Because lettered lists are just another variety of numbered lists, type the letter a and a period (a.), followed by a space, to start a lettered list.

Stopping lists



You've entered the last item in your list. How do you now finish the list and stop the bullets or numbers from appearing?

The animation shows the best methods.

Animation: Right-click, and click **Play**.

The easiest way to stop creating a list is to press **ENTER** twice.

If you need something slightly different, use the **BACKSPACE** key.

Stopping lists

- Mercury
- Venus
- Earth
- Mars
- Jupiter
- Saturn
- Uranus
- Neptune
- |

Enter

- Mercury
- Venus
- Earth
- Mars
- Jupiter
- Saturn
- Uranus
- Neptune

Backspace

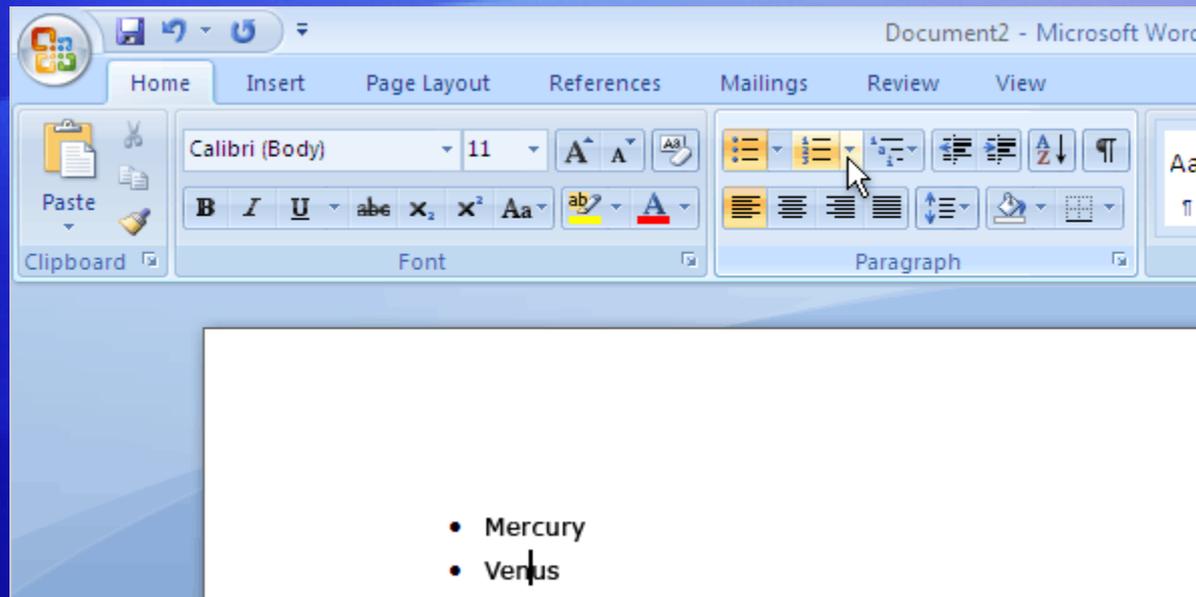
You've entered the last item in your list. How do you now finish the list and stop the bullets or numbers from appearing?

The picture shows the best methods.

The easiest way to stop creating a list is to press **ENTER** twice, as shown on the left.

If you need something slightly different, for example, text that's indented at the same level as the text or bullet above it, use the **BACKSPACE** key.

Bullets or numbers?

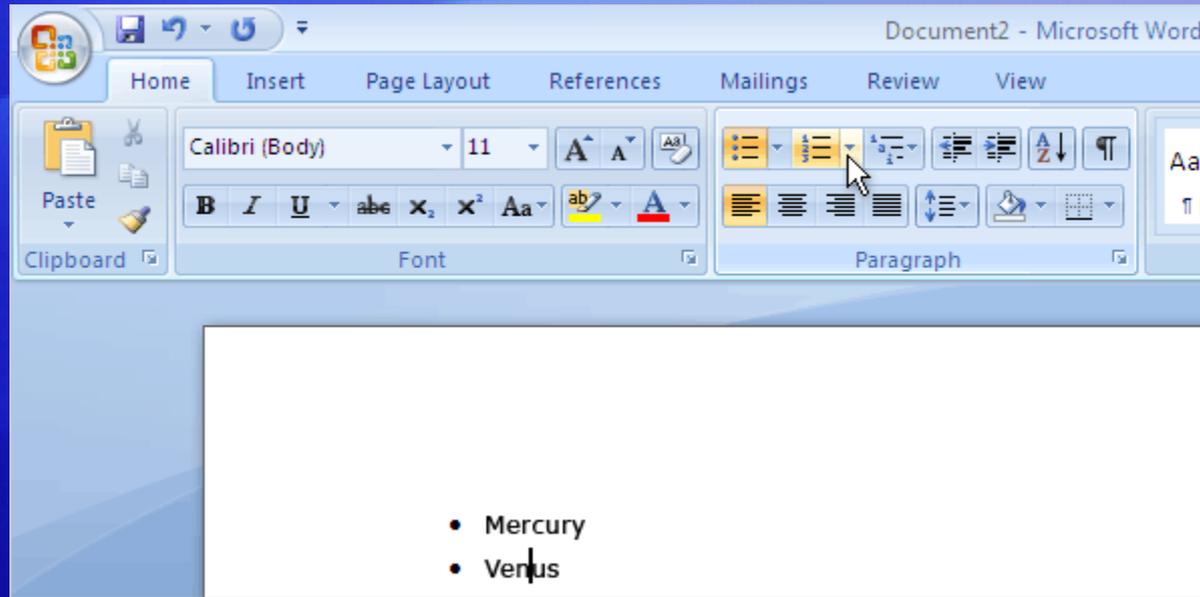


Got the wrong type of list? Started with bullets but now think numbers would be better, or vice versa?

Don't worry, it's easy to switch from one to the other.

Just click somewhere in your list, and then click the **Bullets**  or **Numbering**  button on the Ribbon.

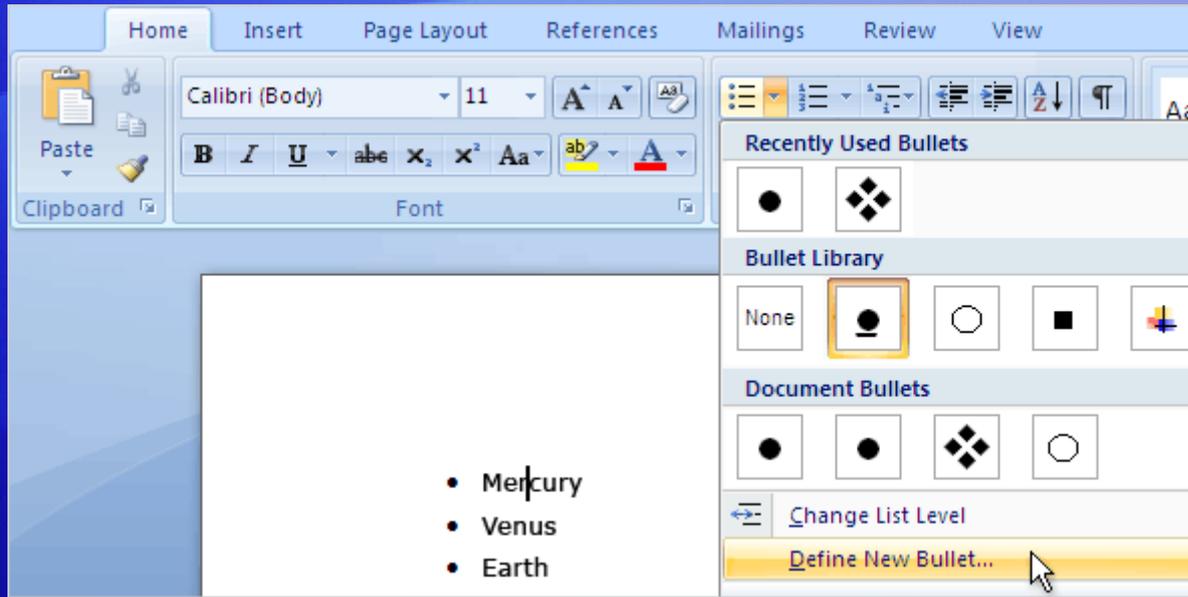
Bullets or numbers?



You can also use these buttons to start new lists.

Either click the button and start typing to create your first list item or select the text you've already typed and click the **Bullets** or **Numbering** button to change each paragraph into a list item.

Change the look of your list

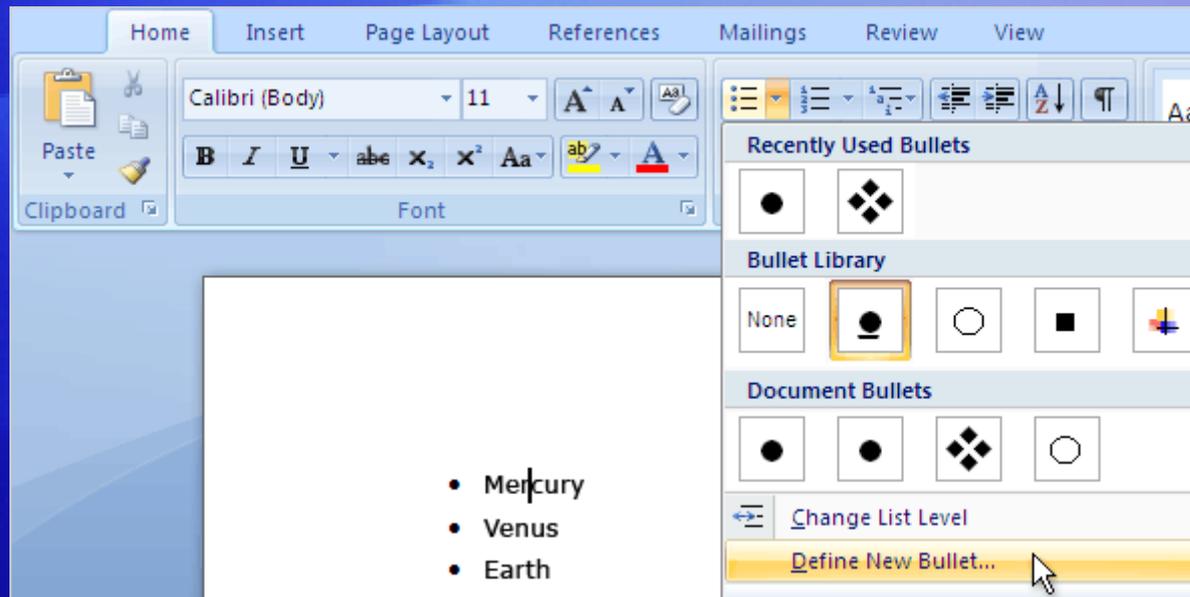


If you have a bulleted list that uses the same boring black circles, there's good news: You can change the bullet design to one of many different built-in designs.

Just click the arrow next to the **Bullets** button to see the **Bullet Library**.

Here's even more good news: If none of those designs appeal to you, you can create your own by clicking **Define New Bullet** at the bottom of the dialog box.

Change the look of your list

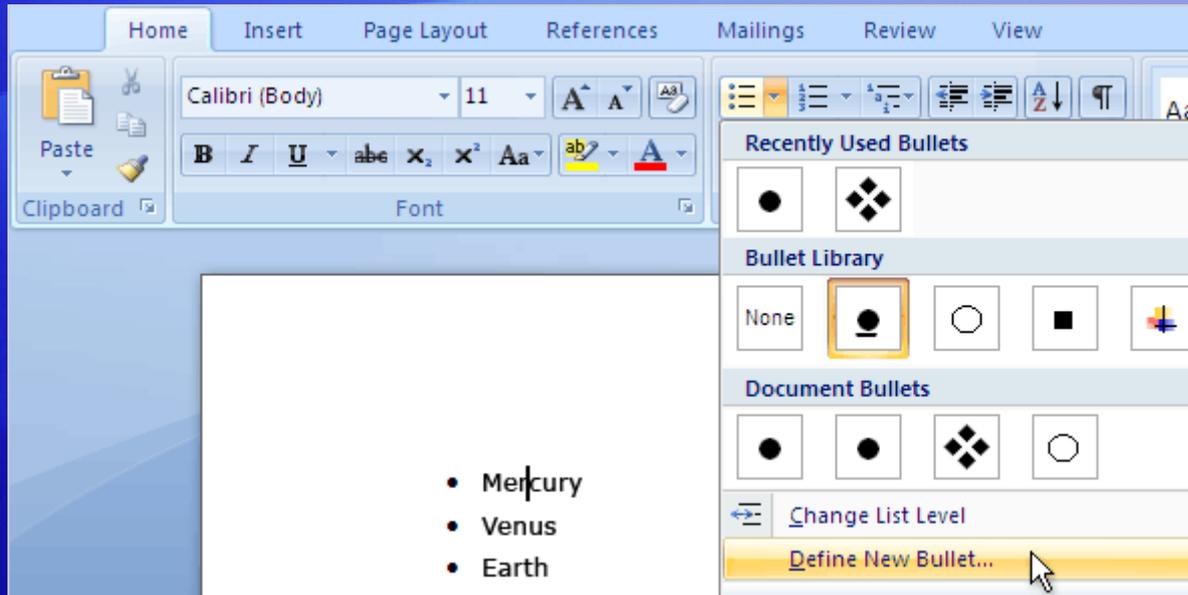


You can design two types of bullet: symbol and picture.

Symbol bullets use a character from a font. For example, Webdings and Wingdings are popular fonts for bullet symbols.

Picture bullets are just that, tiny little pictures.

Change the look of your list



There's a built-in **Numbering Library** too, and you use it in just the same way as the Bullet Library.

You can change font characteristics, such as color, to create your own numbering or symbol bullet style.

After you've added a new design, it will appear in the Bullet or Numbering library from then on unless you remove it by right-clicking it and then clicking **Remove**.

Format a list



It's a little-known secret that in list items, you can format bullets or numbers separately from text.

The picture shows how to change black numbers to red.

- 1 Click the list numbers to select just them, not the text in the list items.
- 2 Change the format the way you would any other text, by using commands on the Ribbon.
- 3 Click away from the list to see the final reformatted list.

Format a list

Here's a formatting tip:

- If you start a list with a formatting pattern that Word recognizes, Word applies it to each item that follows in your list. For example, if you make the first sentence in a list item bold and then type the rest of the paragraph in normal text, the rest of the list items you type are automatically formatted for you. When you press ENTER at the end of the line and start typing the second item's text, it's bold. And after you get to the end of the first sentence, the text goes back to normal text.

The list would look like this:

- **First sentence of first list item is bold.** The following sentence uses normal text.
- **First sentence of second list item is bold.** The following sentence uses normal text.

Working with paragraphs in lists; pasting lists



Suppose you're creating a numbered or bulleted list and you need some of the list items to include subparagraphs, as shown in the picture.

There are several methods for dealing with this scenario; the one you choose depends on the state of your document and your personal preference.

Working with paragraphs in lists; pasting lists

Here are some scenarios:

- If you want to remove an existing bullet or number from a paragraph in a list, and you want to keep the text indented with the rest of the list items, click after the bullet or number you want to delete and press BACKSPACE. If you have subsequent paragraphs, you can indent them by using the TAB key or the **Increase Indent** button .
- If you want to remove an existing bullet or a number from a paragraph in a list and make the text line up with the margin rather than the rest of the list, click the bullet or number you want to remove and click DELETE.

Working with paragraphs in lists; pasting lists

Here are some scenarios:

- You can also create subparagraphs in a list by pressing **SHIFT+ENTER**, rather than just **ENTER**, to end each block of text. This is known as a **soft paragraph**; it creates something that looks just like a paragraph break but in fact is just a continuation of the original paragraph on the next line.
- To continue a list after the subparagraphs, type the next number followed by a period; the list will automatically continue. If you use the **Numbering** button, you'll notice that Word does not carry on the numbering from the first list; it starts a new list beginning at number 1 again, and the **AutoCorrect Options** button  appears next to the list item. Click the **AutoCorrect Options** button, and then click **Continue Numbering**. The new list item will join your list.

Working with paragraphs in lists; pasting lists

And finally, some information about pasting lists:

- If you paste a list into or at the end of an existing list, Word automatically joins the lists together and the numbering for the two lists is combined. You can change this by clicking the **Paste Options** button  that appears just after the pasted text and then choosing **Paste List Without Merging**.

Suggestions for practice

1. Automatically create bulleted, numbered, and lettered lists as you type.
2. Use the Ribbon for bullets and numbering.
3. Craft your own bullets and numbering.

[Online practice](#) (requires Word 2007)

Test 1, question 1

What is a single-level list?

1. A list without sublists in any individual item.
2. A list with every bullet or number at the same indentation.
3. A list with only one item.
4. A list that uses just numbers, no bullets.

Test 1, question 1: Answer

A list without sublists in any individual item.

No lists within lists for a single-level list!

Test 1, question 2

What should you type to automatically create a bulleted list that uses a black dot as the bullet design? (Pick one answer.)

1. 1. and a space
2. @ and a space
3. a. and a space
4. * and a space

Test 1, question 2: Answer

* and a space.

Type an asterisk followed by a space, and you're off.

Test 1, question 3

How should you line up a new paragraph so that the text is indented the same amount as the text in the bulleted list item above? (Pick one answer.)

1. Finish the list, and then use the indents on the ruler to line up the start of the new paragraph.
2. Add a new list item, and then press BACKSPACE to get rid of the bullet.
3. Add a new list item, and then press BACKSPACE twice.
4. Add a new list item, and then press ENTER again.

Test 1, question 3: Answer

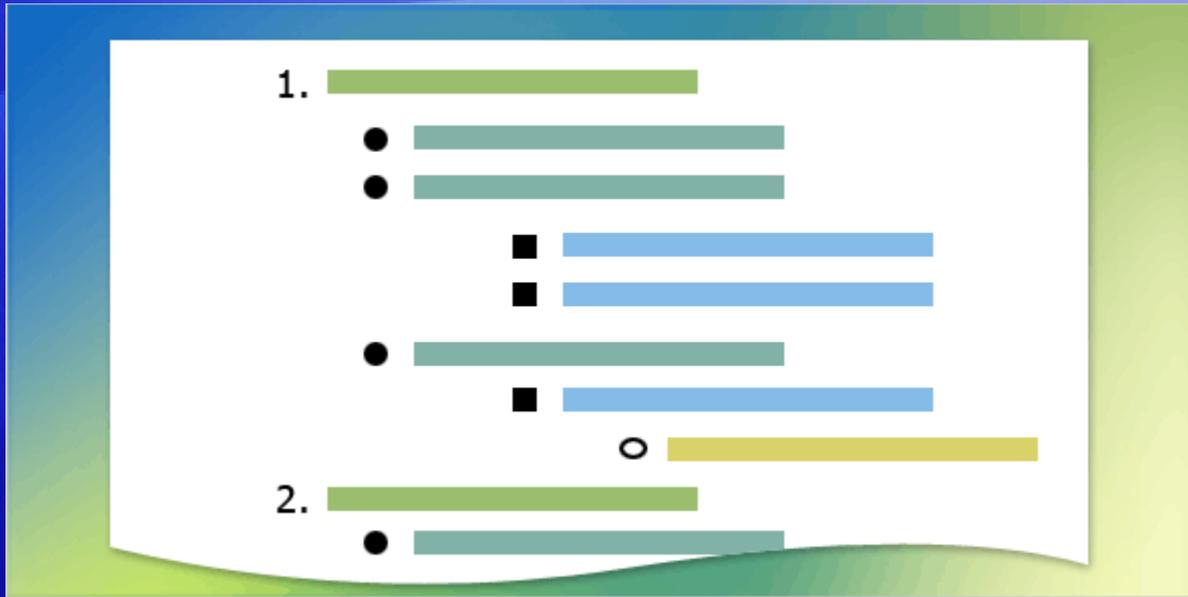
Add a new list item, and then press BACKSPACE to get rid of the bullet.

This is by far the easiest way of achieving the indented paragraph.

Lesson 2

Multilevel lists

Multilevel lists



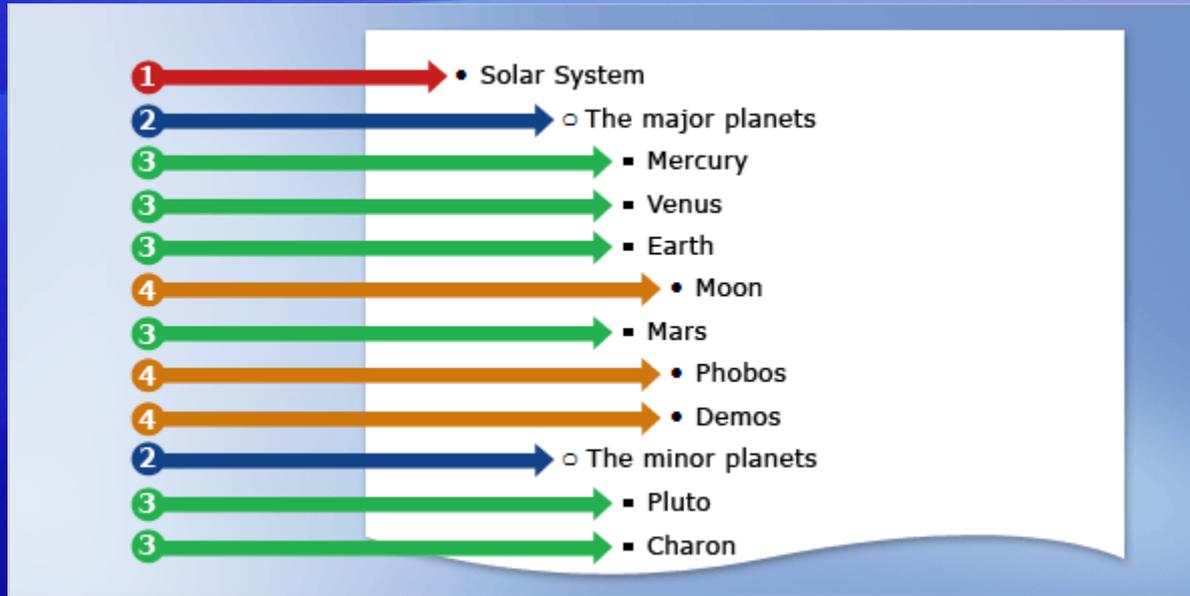
What if some of your list items need to have subsets of information? You need a multilevel list.

A multilevel list has lists within lists, in which you can have many levels, or layers.

A multilevel list, like single-level ones, can be bulleted or numbered — but with the added bonus that you can mix numbers, letters, and bullets.

So, for example, one layer could be bulleted, with a numbered list inside it.

List levels

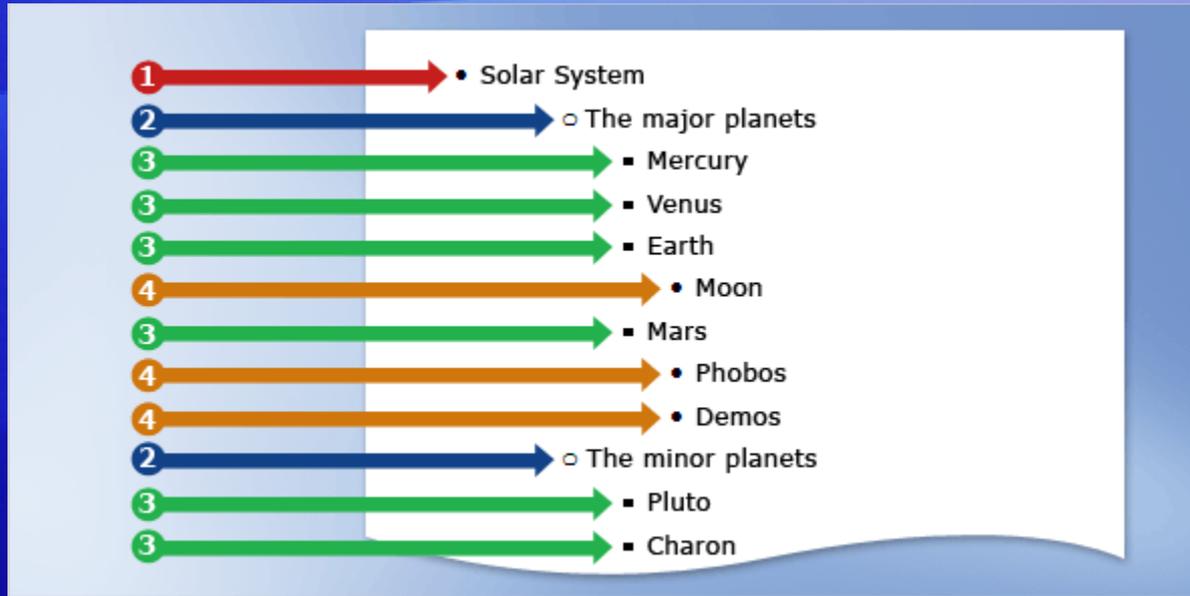


The key to understanding multilevel lists is to understand list levels.

A single-level list has everything at level one, but after you add a list under one item you have list at level two.

Each new list within a list creates a new list level.

List levels

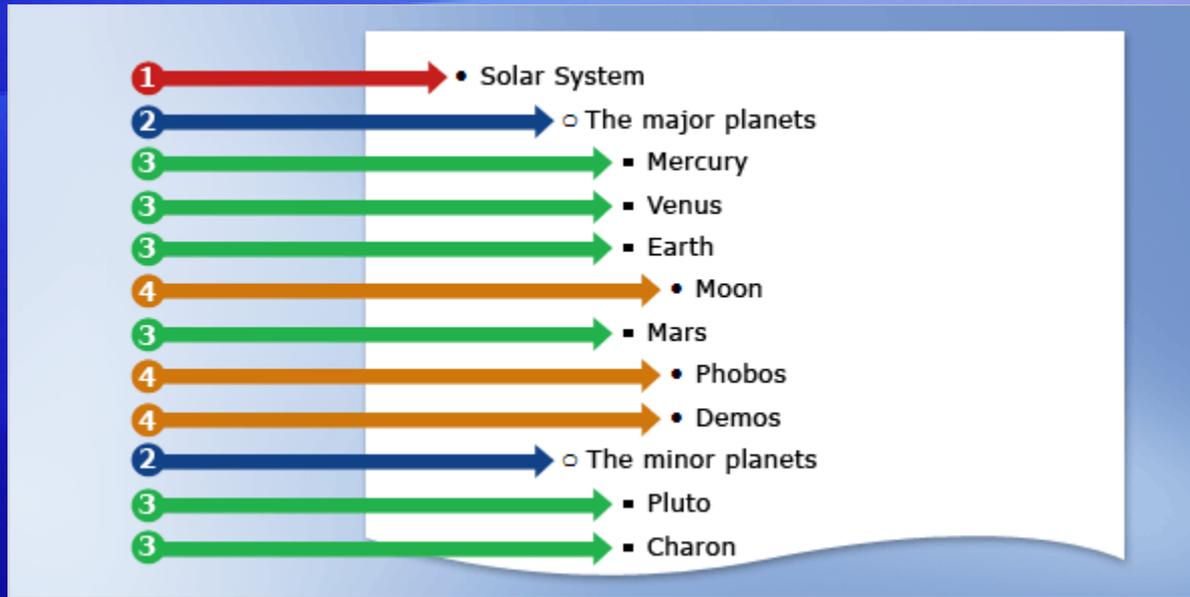


You create a multilevel list by typing or by using the commands on the Ribbon exactly as you did with the single-level lists.

So start with a bullet or number, enter your first item, and then press ENTER.

When you're ready to start the next level, press the **Increase Indent** button , type the first list item of that level, and then press ENTER.

List levels

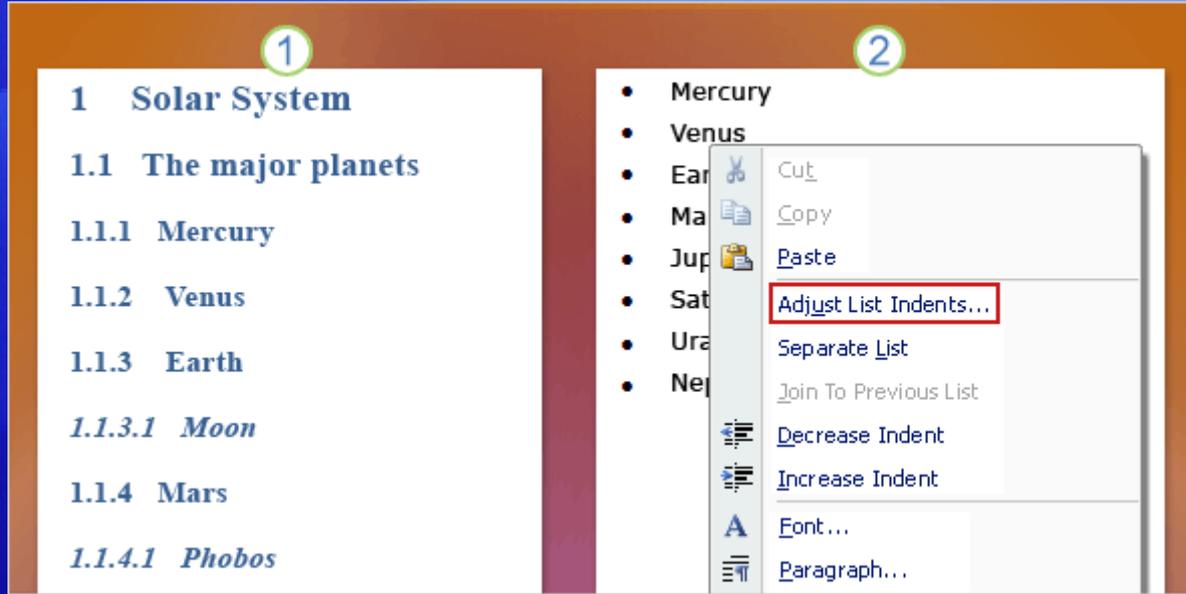


When you're working with different list levels, you can move between the levels using the **Increase Indent**  and **Decrease Indent**  buttons on the Ribbon.

You can also increase and decrease indents by using keystrokes.

Press **TAB** to increase the indent, and press **SHIFT+TAB** to decrease it.

All about indentation

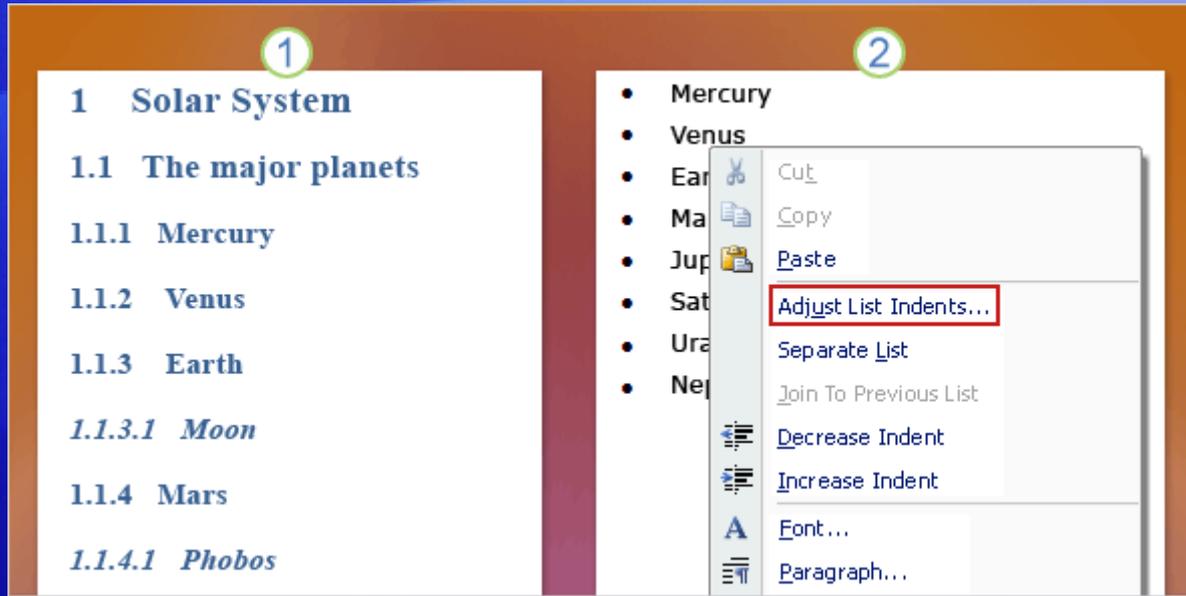


It's natural to think that the list level is determined by the indentation from the left margin.

While that's the default behavior of a lot of lists, some don't have different indents for different levels.

If you want to change the amount a list is indented from the margin, don't use the TAB key or the **Increase Indent** button.

All about indentation

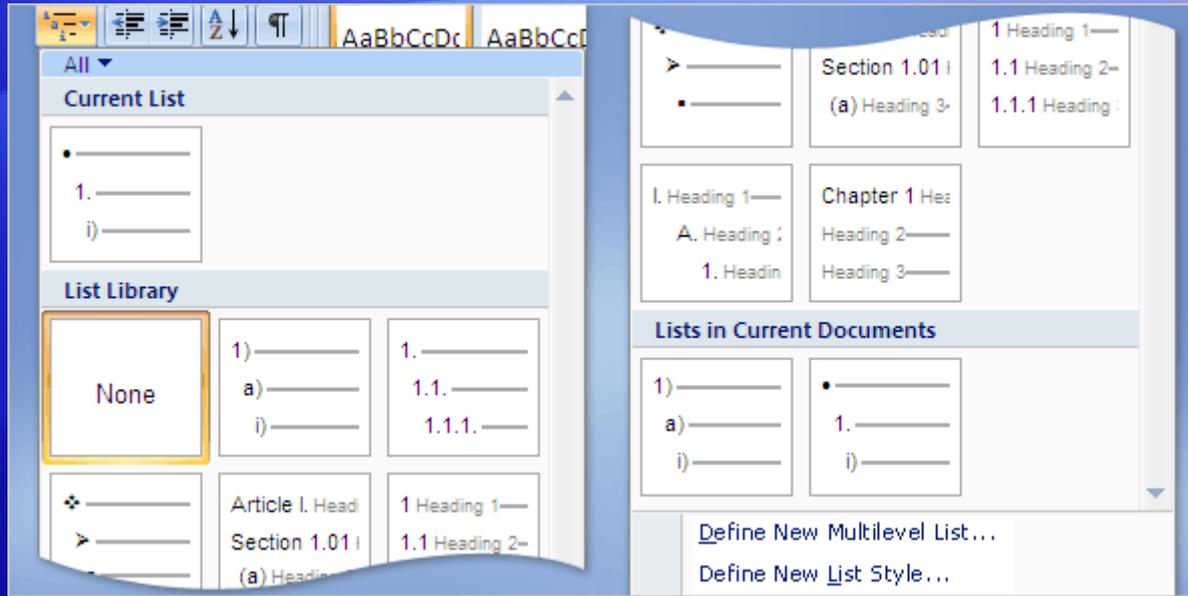


It's natural to think that the list level is determined by the indentation from the left margin.

The picture illustrates what to do instead.

- ① Here's a list that does not have different indentation for the different levels.
- ② Right-click the list, and then choose **Adjust List Indents**. In the dialog box that appears, you can change the indent of both the bullet or number and the text.

The List Library

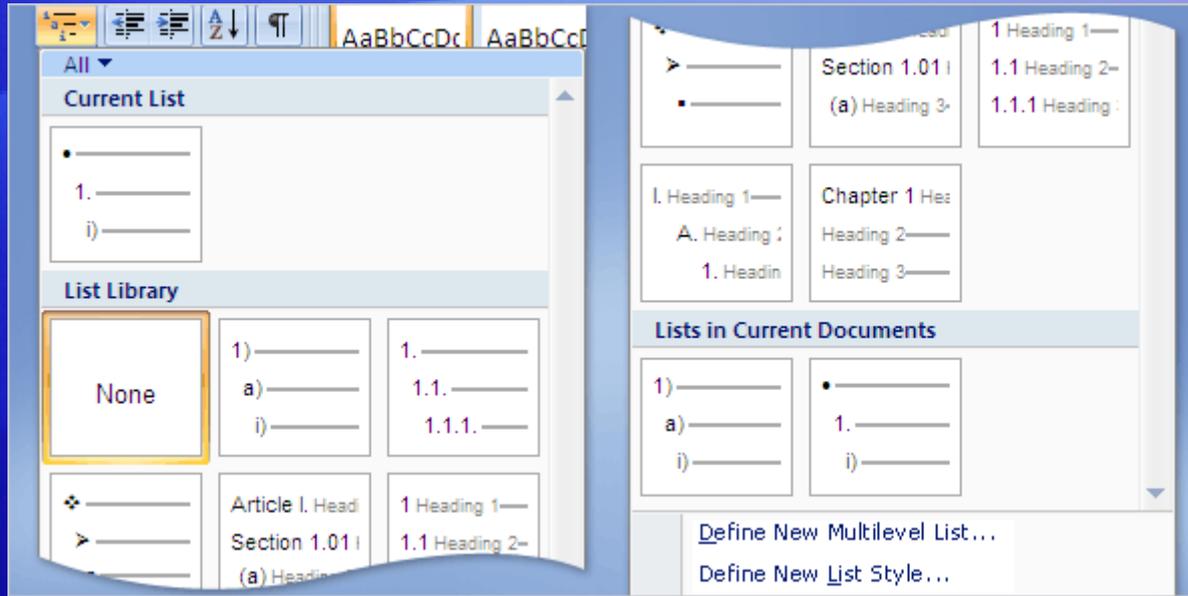


Just as with single-level lists, you can choose your multilevel list design. But multilevel lists have an extra feature: you can choose each level independently or do it all in one go.

Start by clicking the **Multilevel List** button to see the **List Library**. Once again, you can choose a built-in list or design your own.

If you choose to design your own list, click **Define New Multilevel List**. You'll have to set the characteristics you want for each level.

The List Library



As you can see in the picture, there's also an option to define a new list style by using the **Define New List Style** command.

Defining a new list style is a smart thing to do if you think you're going to use the same list design again but may want to make some changes to the design later.

Suggestions for practice

1. Create a multilevel list.
2. Create a list by using keystrokes.
3. Change the formatting and appearance of your list.

[Online practice](#) (requires Word 2007)

Test 2, question 1

What is a multilevel list? (Pick one answer.)

1. A list with more than one item in it.
2. A list with both numbers and bullets in it.
3. A list with sublists under individual items in the main list.
4. A document with more than one list in it.

Test 2, question 1: Answer

A list with sublists under individual items in the main list.

In other words, a list within a list.

Test 2, question 2

To move between levels in a list you must use the Increase Indent  and Decrease Indent  buttons. (Pick one answer.)

1. True.
2. False.

Test 2, question 2: Answer

False.

You can also use TAB and SHIFT+TAB to move between levels.

Test 2, question 3

When changing the design of a multilevel list, you have the following options: (Pick one answer.)

1. Bullets at every level.
2. Numbers at every level.
3. Letters at every level.
4. A mixture of bullets, numbers, and letters.
5. All of the above.

Test 2, question 3: Answer

All of the above.

You can have exactly what you want in a multilevel list.

Quick Reference Card

For a summary of the tasks covered in this course, view the [Quick Reference Card](#).

JohnRouda.com presents:

Microsoft® Office Word 2007 Training

**Mail merge I: Use mail merge
for mass mailings**

Course contents

- Overview: Mailings en masse
- Lesson 1: How it works
- Lesson 2: Set up your recipient list
- Lesson 3: Perform a complete mail merge

Two of the three lessons include a list of suggested tasks; each includes a set of test questions.

Overview: Mailings en masse



You need to send to each of your employees a letter or e-mail message containing personal tax withholding and salary information.

Creating each item individually would take hours. Enter mail merge.

Using mail merge, you create one document containing the information that's the same in each copy, and add placeholders for the unique information. Word takes care of the rest.

Course goals

- Understand how mail merge works so that you can get the results you want.
- Set up a document for a mass mailing.
- Use the Mail Merge Wizard to perform a basic mail merge.

Lesson 1

How it works

How it works

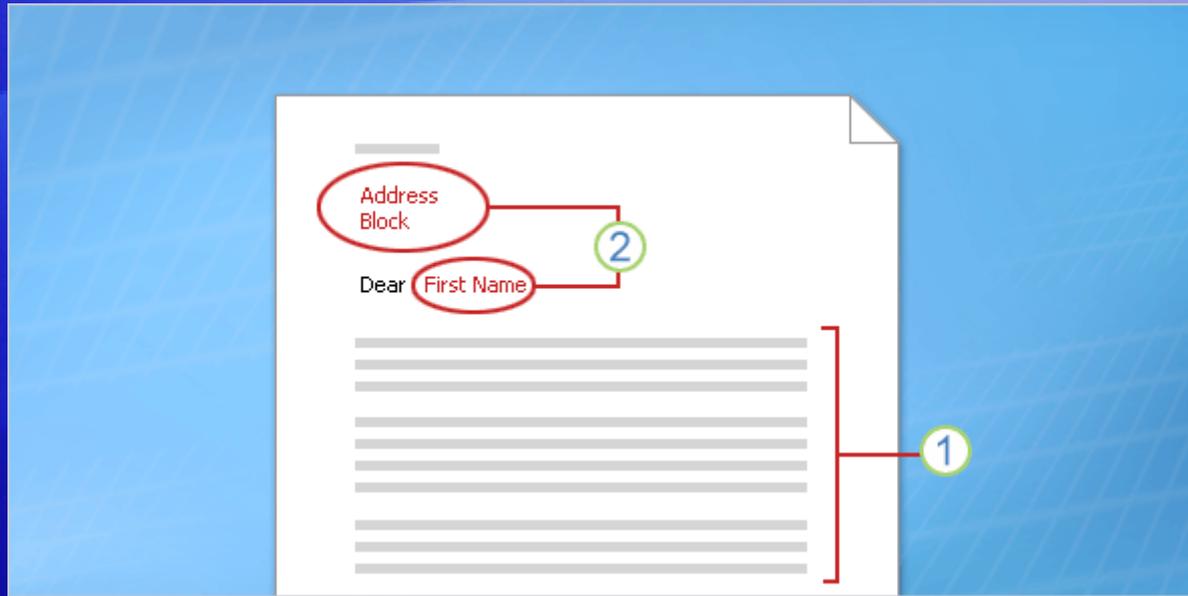


In any mail merge, you'll deal with three different elements.

Understanding these elements will help you get the mail merge results you want and expect.

- ① The main document that you start with.
- ② Recipient information, such as each person's name and address that you want to merge with the main document.
- ③ The finished documents, which include the information in the main document plus each recipient's unique information.

Main document

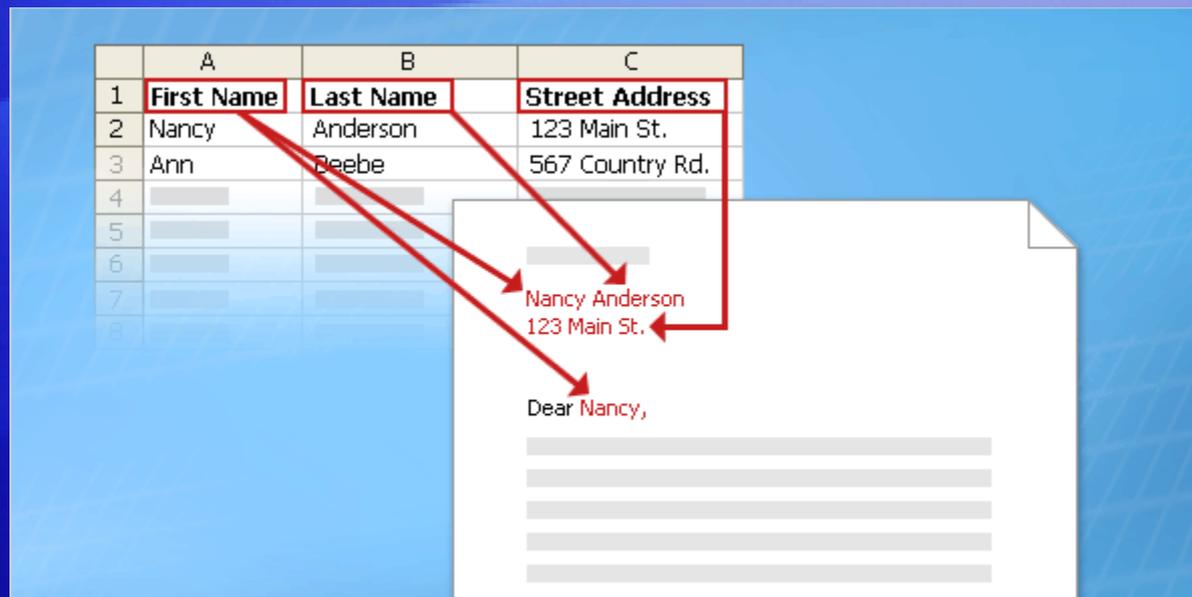


The main document is your starting point. The main document can be a letter, envelope, e-mail, or even a coupon.

It contains the elements shown here.

- ① Content that is identical in each copy, such as the main body text of a form letter. You only have to type this text once, regardless of how many letters you intend to print.
- ② Placeholders for each recipient's information. For example, in a form letter, the address block and greeting name would be unique in each copy.

Recipient information



In a mail merge, the recipient's information, which is unique in each merged copy, fills in for the placeholders that you added to the main document.

Recipient information might be: Addresses on envelopes or labels; names in the greeting line of a form letter; salary amounts in e-mail messages that you send to your employees; personal notes about favorite products in postcards that you mail to your best customers; or numbers on redeemable coupons.

Mail merge I: Use mail merge for mass mailings

Recipient information

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

Nancy Anderson
123 Main St.

Dear Nancy,

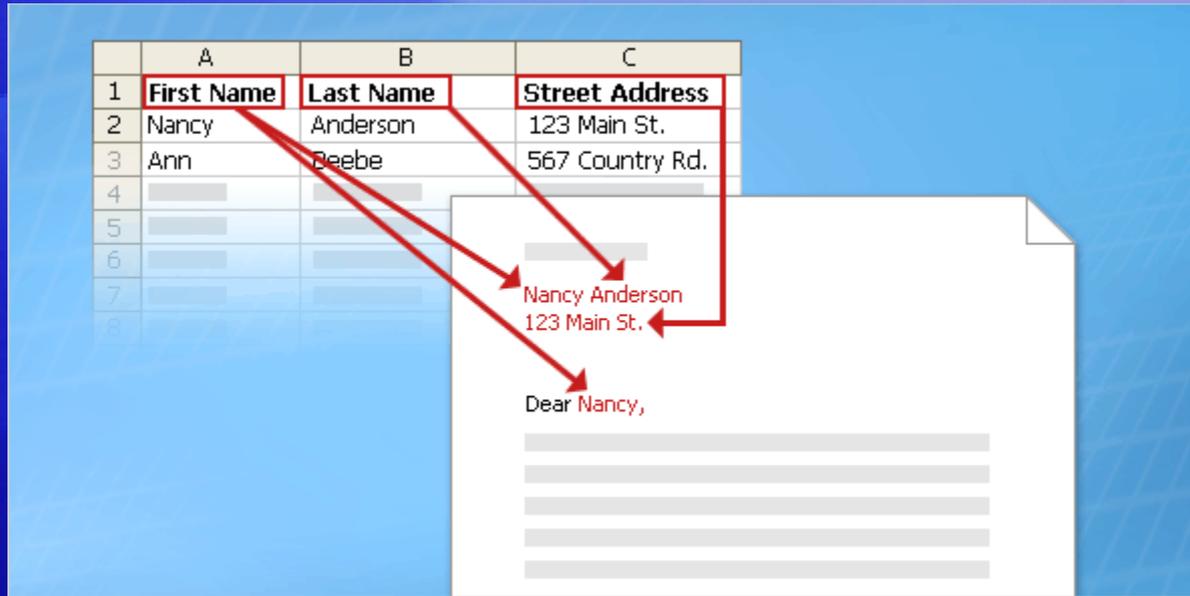
Recipient information must be kept in a **data source**.

“Data source” is an umbrella term that covers a whole category of files you work with all the time.

For example, your Microsoft Office Outlook® contacts list is a data source.

Mail merge I: Use mail merge for mass mailings

Recipient information



The diagram illustrates the process of mail merge. On the left, a table with columns A, B, and C contains recipient data. Red boxes highlight the 'First Name', 'Last Name', and 'Street Address' columns. Red arrows point from these columns to a document template on the right. The template shows the recipient's name and address being inserted into the document, along with a personalized salutation 'Dear Nancy,'.

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

Nancy Anderson
123 Main St.

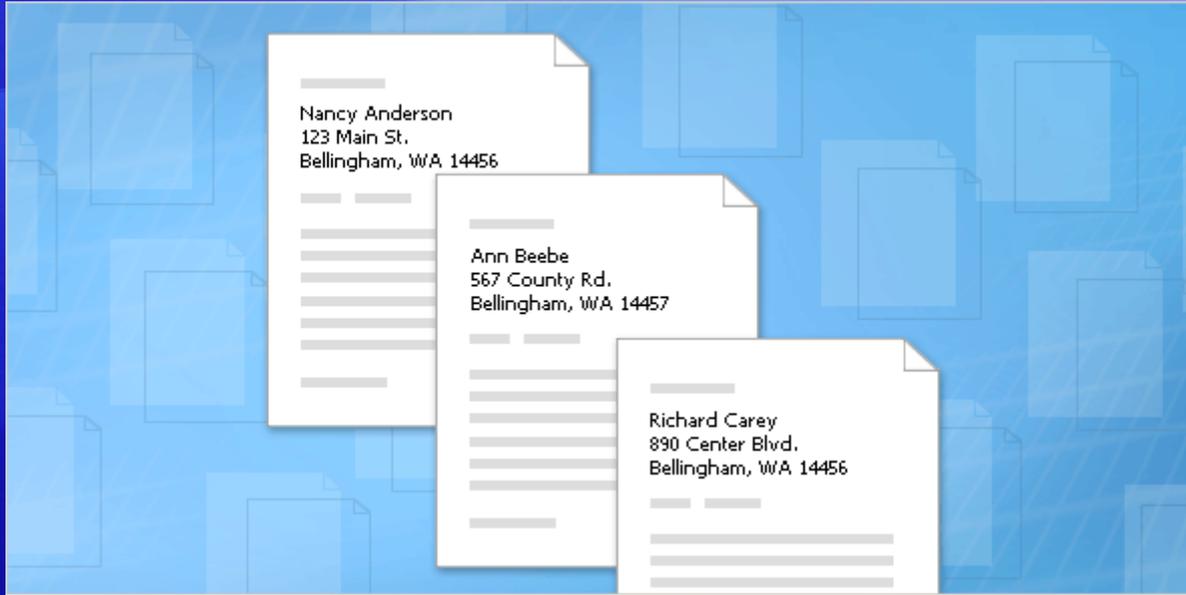
Dear Nancy,

The recipient information is usually listed in columns and rows, as shown in the table in the picture.

The data source file must be structured in a way that makes it possible to link specific information with the placeholders in the main document.

Mail merge I: Use mail merge for mass mailings

Finished set of documents

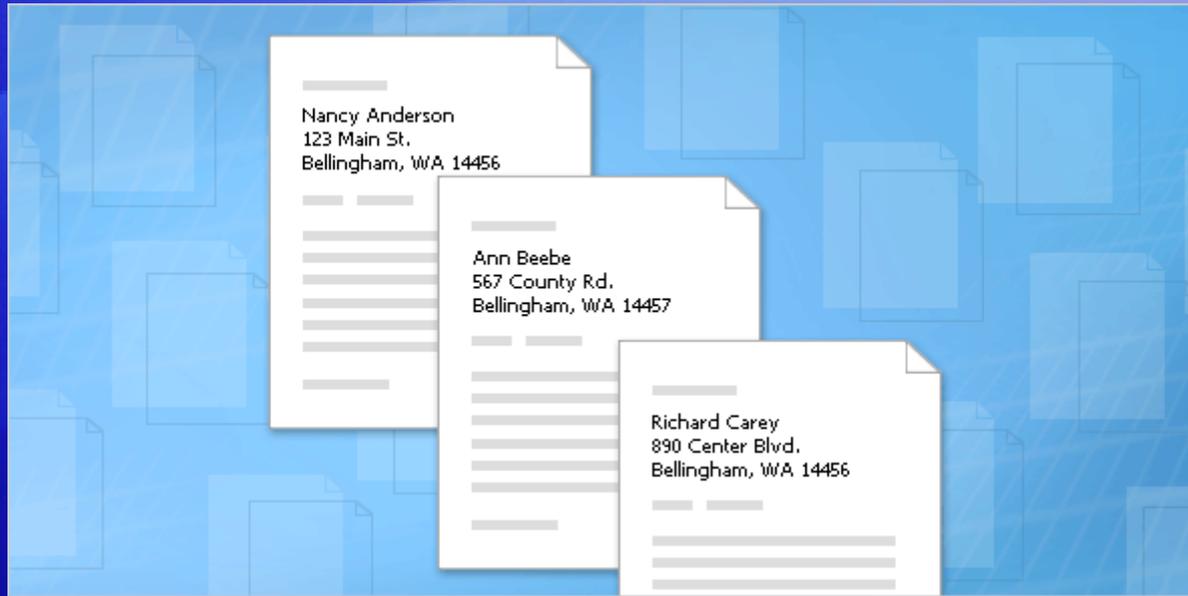


When you finish a mail merge, you get what's pictured here.

- The set of individual finished documents, which you can print (for example, letters, labels, envelopes, or coupons) or which you can transmit electronically during the merge process (for example, e-mail messages).

Mail merge I: Use mail merge for mass mailings

Finished set of documents



When you finish a mail merge, you get what's pictured here.

- The main document. This is the document you used as a starting point, which remains a separate document. It is not automatically saved after the merge.

Mail merge I: Use mail merge for mass mailings

Test 1, question 1

In a mail merge, what is the main document? (Pick one answer.)

1. The document you start with that contains both text that is identical for each merged letter, envelope, and so on, and placeholders for the unique recipient information.
2. The first document in the set of finished merged documents.
3. A document that contains only the text that is identical in each merged copy.

Test 1, question 1: Answer

The document you start with that contains both text that is identical for each merged letter, envelope, and so on, and placeholders for the unique recipient information.

The main document is your starting document, where you add all the text that will be the same in every copy as well as placeholders that indicate what the unique recipient information will be and where it will appear.

Test 1, question 2

The main document with the text and placeholders is automatically saved after the merge is complete. (Pick one answer.)

1. True.
2. False.

Test 1, question 2: Answer

False.

You should save the main document, so that you can use it again to complete a new merge.

Test 1, question 3

Why does the unique recipient information you use in a mail merge have to be stored in a data source file? (Pick one answer.)

1. Data source files are a special type of file that only works with mail merge.
2. Data source files organize information in a way that lets you match specific pieces of that information with specific placeholders in the main document.
3. Data source files are designed to hold a lot of information.

Test 1, question 3: Answer

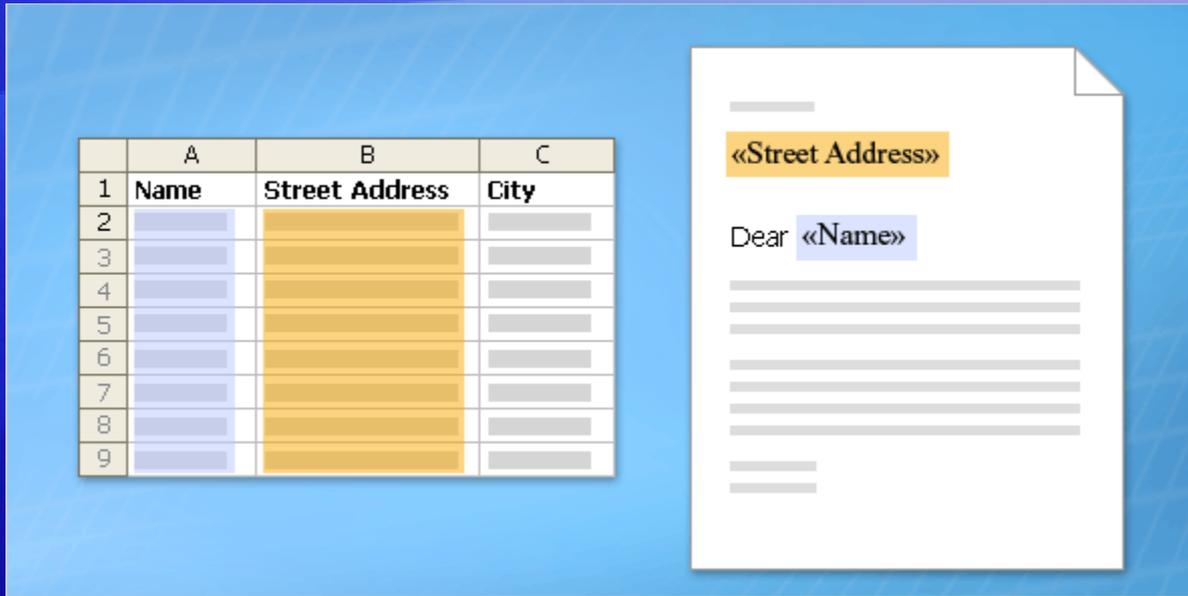
Data source files organize information in a way that lets you match specific pieces of that information with specific placeholders in the main document.

It's the structured way that information is organized in the files that makes it possible for you to put information from one cell in that file into one unique document.

Lesson 2

Set up your recipient list

Set up your recipient list



You know what the basic elements of a mail merge are.

Now you'll learn how to set up your main document and connect it to the recipient list.

The recipient list, along with the placeholders that you add to your Word document or envelope, is the heart and soul of mail merge.

They work together to get unique information into the final individually merged copies.

More about the recipient list

	A	B	C
1	First Name	Last Name	Street Address
2	Nancy	Anderson	123 Main St.
3	Ann	Beebe	567 Country Rd.
4			
5			
6			
7			
8			
9			
10			
11			
12			

A recipient list can be any file that organizes recipient information into columns and rows. You can create it using lots of different programs, such as Excel, Access, or Outlook.

- 1 The columns in a list represent a category or type of information. Each column is identified by a column heading. For example, in a customer list you might have columns for Name, Last Name, and Street Address.

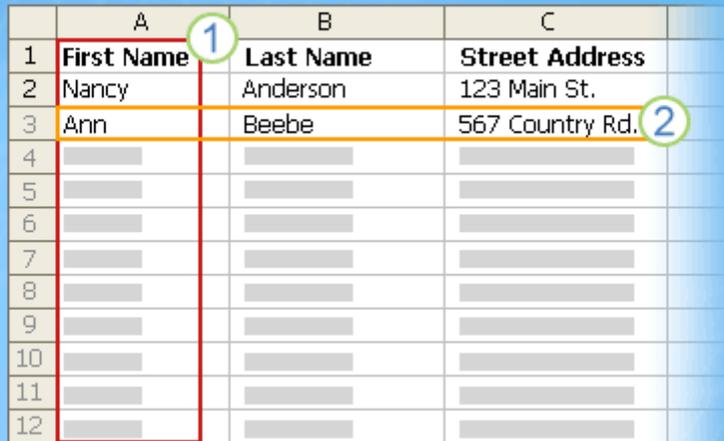
More about the recipient list

	A	B	C
1	First Name	Last Name	Street Address
2	Nancy	Anderson	123 Main St.
3	Ann	Beebe	567 Country Rd.
4			
5			
6			
7			
8			
9			
10			
11			
12			

A recipient list can be any file that organizes recipient information into columns and rows. You can create it using lots of different programs, such as Excel, Access, or Outlook.

- ② Each row in a list represents one recipient's complete information. In the customer list, for example, one row contains all the information about one customer: the customer's name, address, and so on.

More about the recipient list

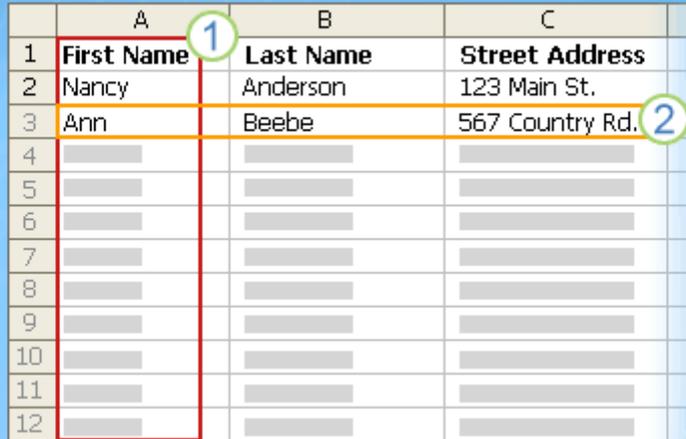


	A	B	C
1	First Name	Last Name	Street Address
2	Nancy	Anderson	123 Main St.
3	Ann	Beebe	567 Country Rd.
4			
5			
6			
7			
8			
9			
10			
11			
12			

It's these columns and rows that make it possible to get unique recipient information into documents during a mail merge.

From the main document, you connect to the list and then you can add any column heading as a placeholder into the main document. (Officially, these placeholders are called fields. More on fields in a moment.)

More about the recipient list



	A	B	C
1	First Name	Last Name	Street Address
2	Nancy	Anderson	123 Main St.
3	Ann	Beebe	567 Country Rd.
4			
5			
6			
7			
8			
9			
10			
11			
12			

It's these columns and rows that make it possible to get unique recipient information into documents during a mail merge.

When the mail merge is complete, there will be a finished document for each person that contains information from the entries in one row of the recipient list.

Where the recipient list comes from



In many cases, the recipient list that you want to use will already exist.

For example, you might have access to a file with a list of the following.

- Customer or contact names, addresses, and more.
- The products or services your company offers.
- Information about your employees.

Mail merge I: Use mail merge for mass mailings

Where the recipient list comes from



If the list exists, you can just connect it during the mail merge.

But don't worry if you don't have a list yet. The mail merge process includes a step where you can create a recipient list from scratch. More on this in the next lesson.

Fields



After you connect to the recipient list, you can specify the information that you want to include in the mail merge by using **fields**.

A field is a set of codes that instructs Word to insert information into a document automatically.

Informally, you can think of fields as placeholders.

Fields

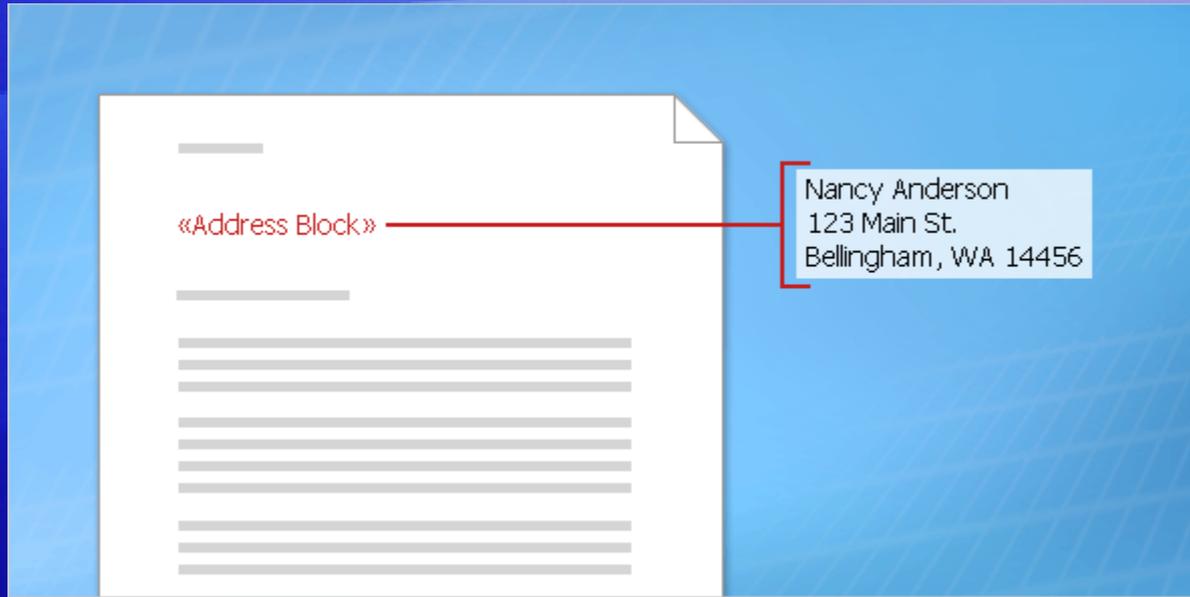


In a mass mailing, the fields you use are called **merge fields**, and they are the placeholders for the unique information that comes directly from a recipient list.

For example, in the illustration, merge fields have been added for information stored in the Address and Name columns of a recipient list.

Notice that they're surrounded by chevrons (« ») in a document.

Merge fields

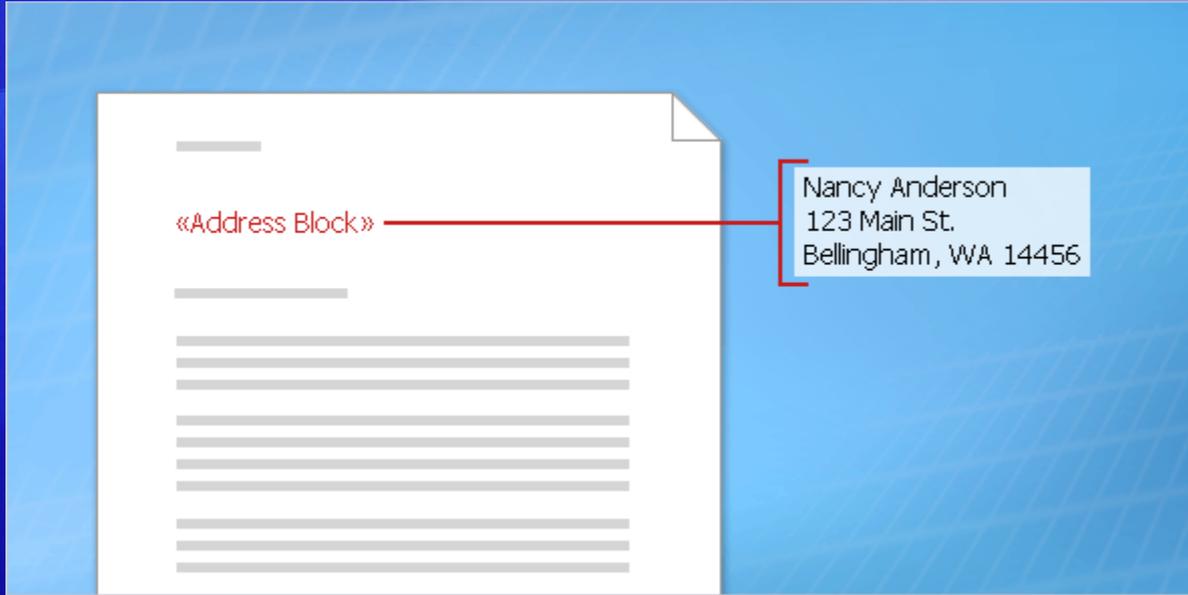


You can create a merge field by combining other fields, or group fields and then use spaces, line breaks, and punctuation marks as you would normally in a sentence.

For example, you might want to create a courtesy title before the surname or full name and set up fields in your document like this:

«Title» «Last Name»
«Street Address»
«City», «State» «Postal Code»

Merge fields



You can also control how recipient information looks in the merged documents by formatting the fields.

For example, you might want names to be bold or colored red.

In the main document, select the field, including the surrounding chevrons (« »). On the **Home** tab, click any command in the **Font** group or the **Paragraph** group, and choose the formatting options you want.

Suggestions for practice

1. Divide the data in the **Name** column into two columns.
2. Create a Personal Note column.
3. Save the Excel worksheet.

[Online practice](#) (requires Excel 2007)

Test 2, question 1

What is the relationship between your recipient list and the fields you insert into the main document? (Pick one answer.)

1. There is no relationship.
2. Fields are equivalent to the columns in the recipient list.
3. Each field represents one cell in the recipient list.

Test 2, question 1: Answer

Fields are equivalent to the columns in the recipient list.

Adding a field to the main document means that information stored in the corresponding column in your list will appear in the merged documents.

Test 2, question 2

How can you distinguish a field from other text in a main document? (Pick one answer.)

1. Fields are always formatted as bold text.
2. Fields are italicized.
3. Fields are surrounded by chevrons (« »).

Test 2, question 2: Answer

Fields are surrounded by chevrons (« »).

Test 2, question 3

You must have an existing recipient list in order to perform a mail merge. (Pick one answer.)

1. True.
2. False.

Test 2, question 3: Answer

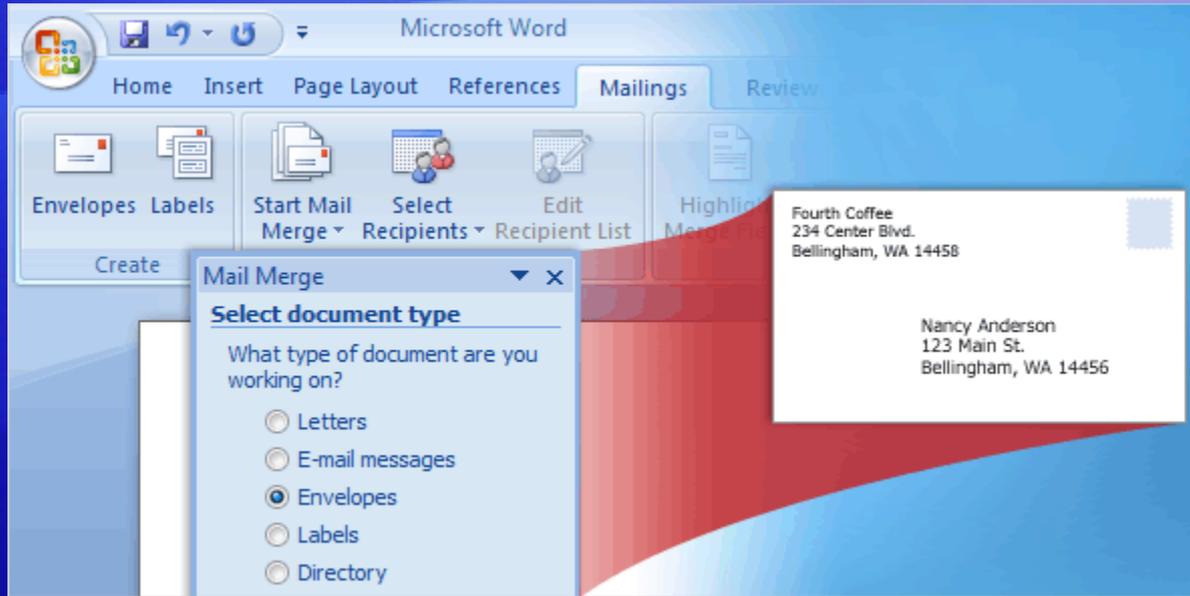
False.

You can create this list as part of the mail merge process. If you have only a few people for the mail merge, it may be easiest to type the list during the process.

Lesson 3

Perform a complete mail merge

Perform a complete mail merge

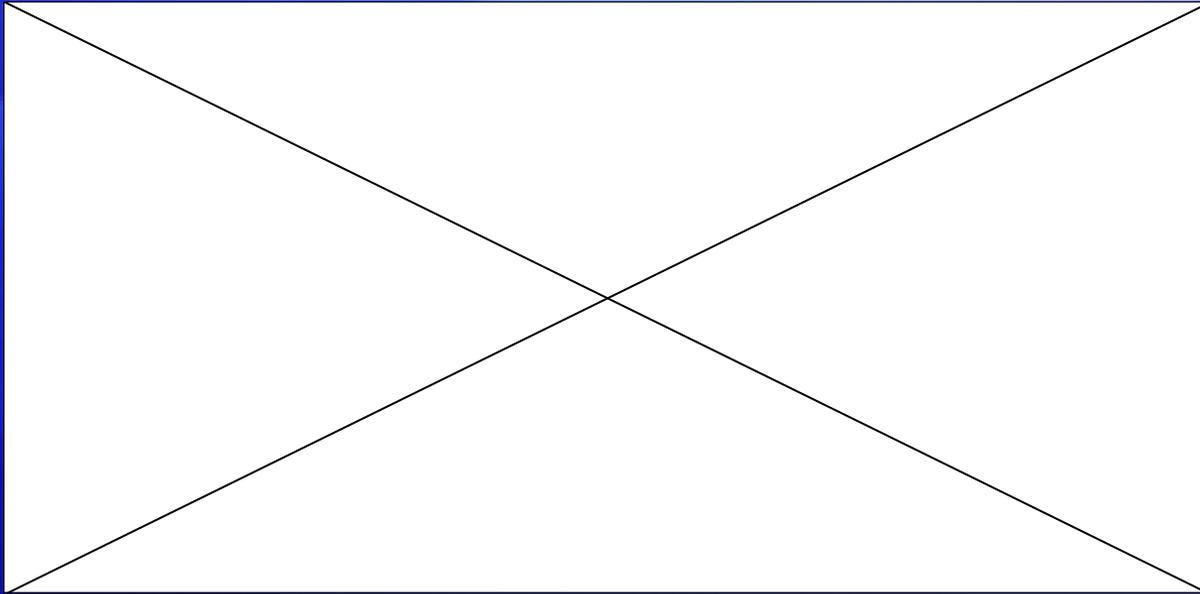


Now you'll walk through the process of performing a mail merge by using the Mail Merge Wizard.

At the end of this lesson you will learn about another way to perform a mail merge.

Mail merge I: Use mail merge for mass mailings

Open the Mail Merge Wizard

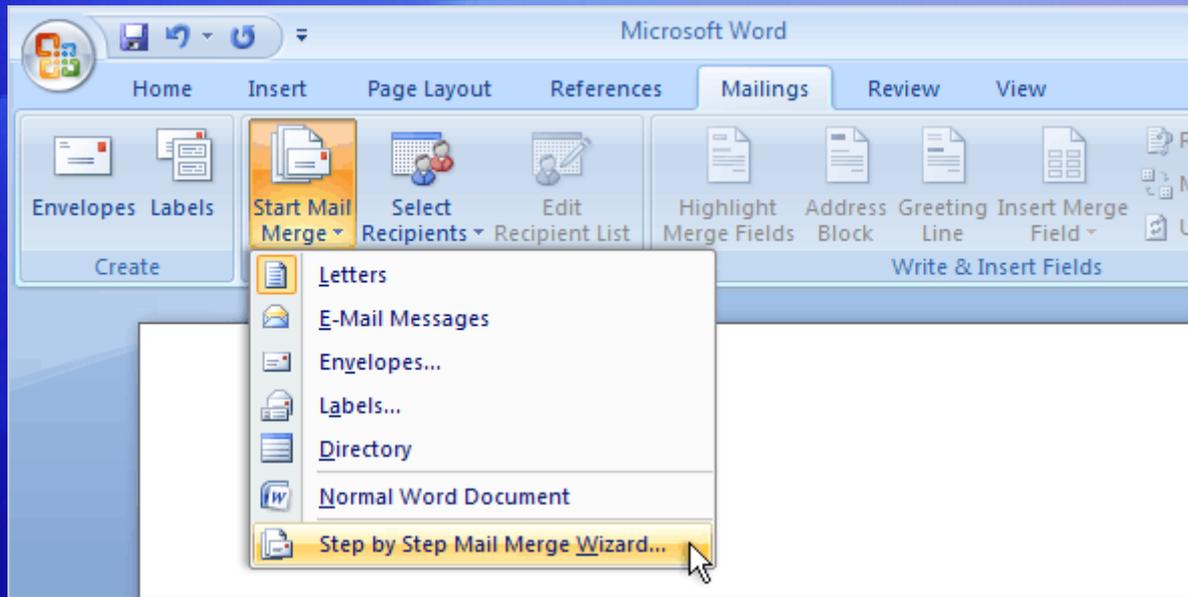


To perform a mail merge, click **Start Mail Merge** on the **Mailings** tab, and then click **Step by Step Mail Merge Wizard**.

Animation: Right-click, and click **Play**.

The wizard opens on the right of the window in a task pane. Follow the prompts and click **Next** at the bottom of the pane to step through the wizard (or **Previous** if you need to go back to an earlier step).

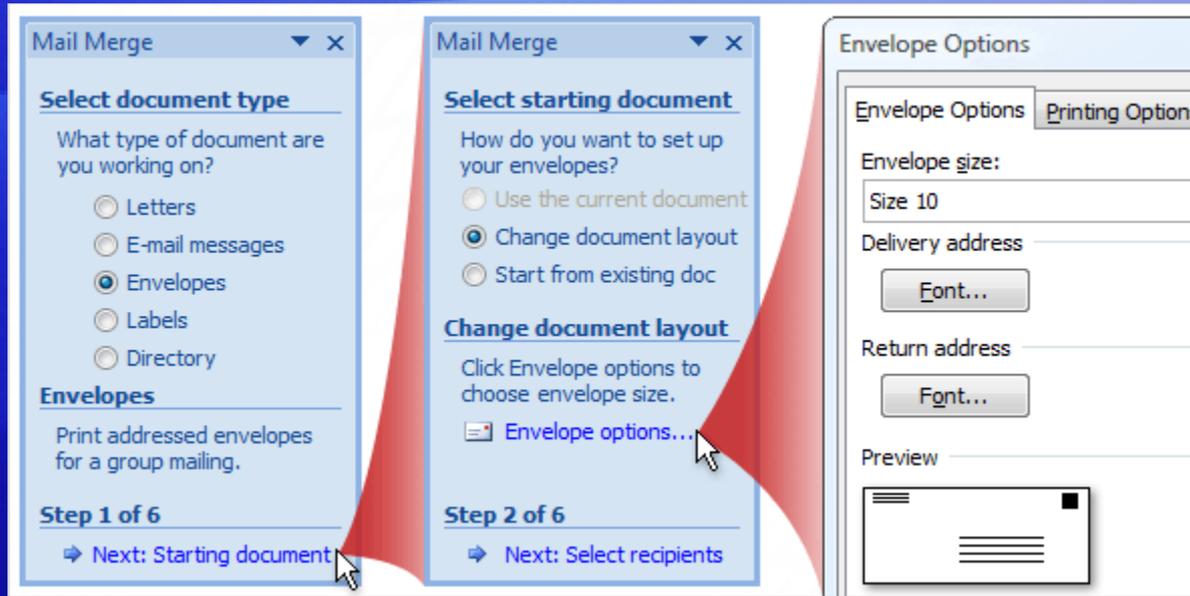
Open the Mail Merge Wizard



To perform a mail merge, click **Start Mail Merge** on the **Mailings** tab, and then click **Step by Step Mail Merge Wizard**, as shown here.

The wizard opens on the right of the window in a task pane. Follow the prompts and click **Next** at the bottom of the pane to step through the wizard (or **Previous** if you need to go back to an earlier step).

Set up the main document

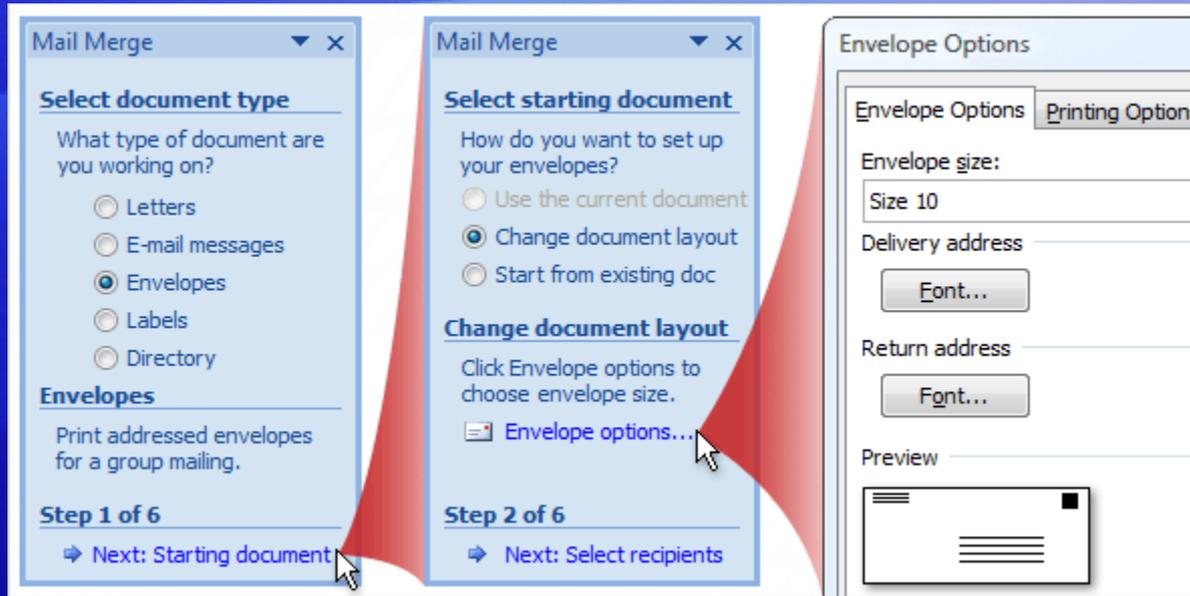


The second step in the wizard is to set up the starting document.

You may be sending a direct mail letter, or an e-mail message, or perhaps you want to start with envelopes and labels.

Or you may want to create a directory to store listings of data, such as customer names and addresses, product information, and personnel contact data.

Set up the main document

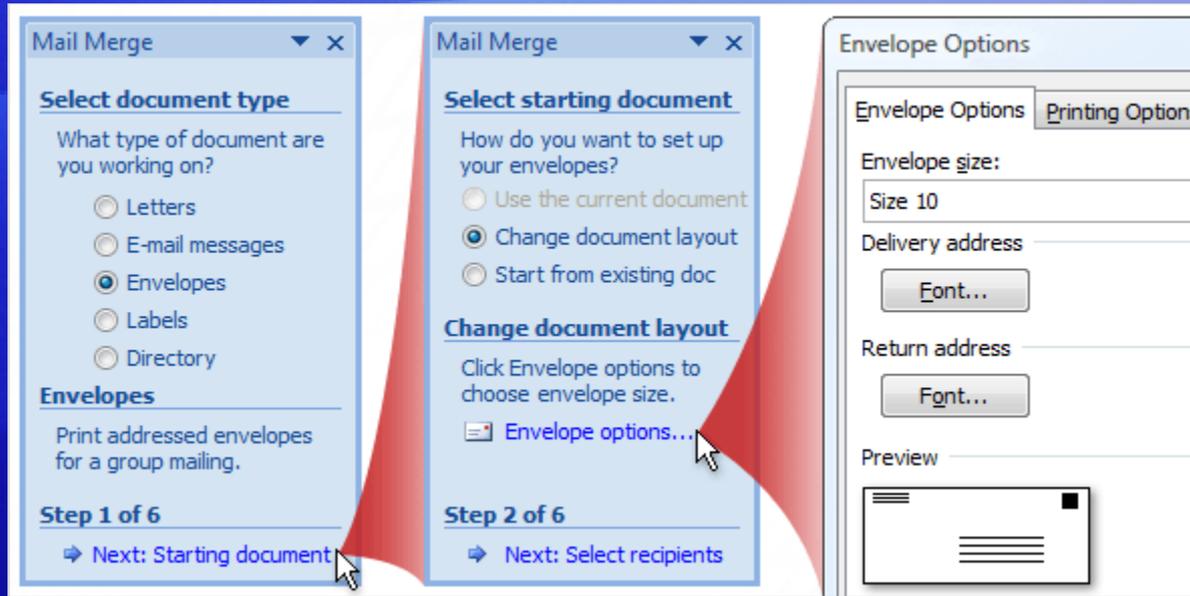


The options in the wizard vary according to the type of document selected in the first step.

You selected envelopes, which has these options.

Change document layout. This option is selected because a blank document was open when you started the wizard. You want to change the open blank document to an envelope document. Click **Envelope options** and choose the envelope size and other options you want, and then the envelope document replaces the blank document.

Set up the main document

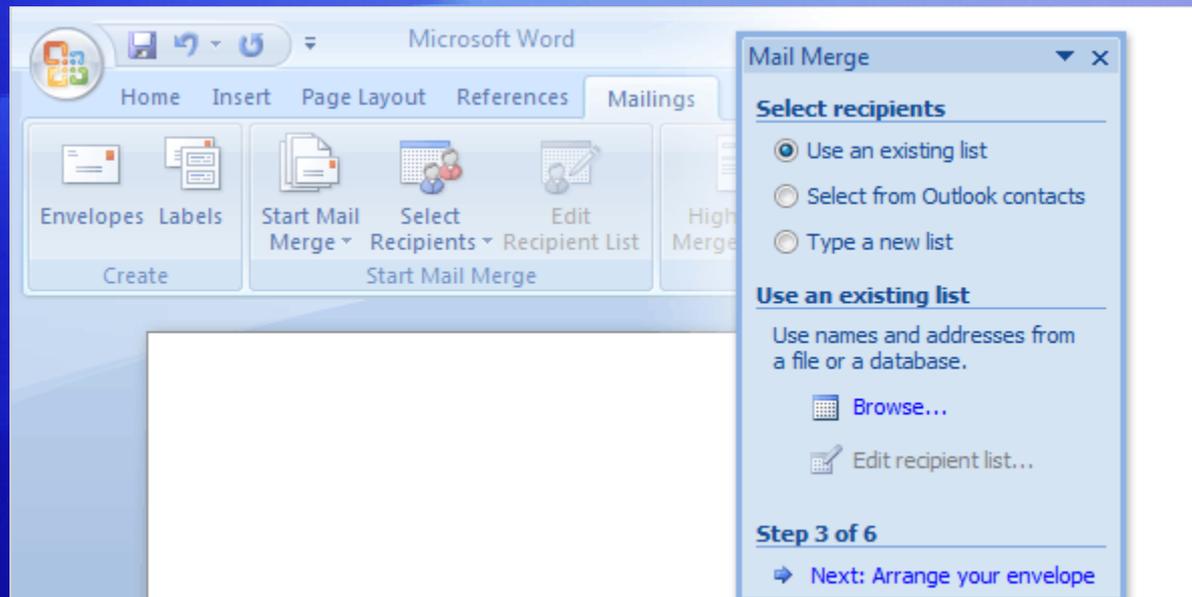


The options in the wizard vary according to the type of document selected in the first step.

You selected envelopes, which has these options.

Start from existing document. If you have a previously saved envelope that you want to use for the mail merge, but your screen currently has a blank document open, select this option to replace the blank document with your envelope.

Connect to the recipient list



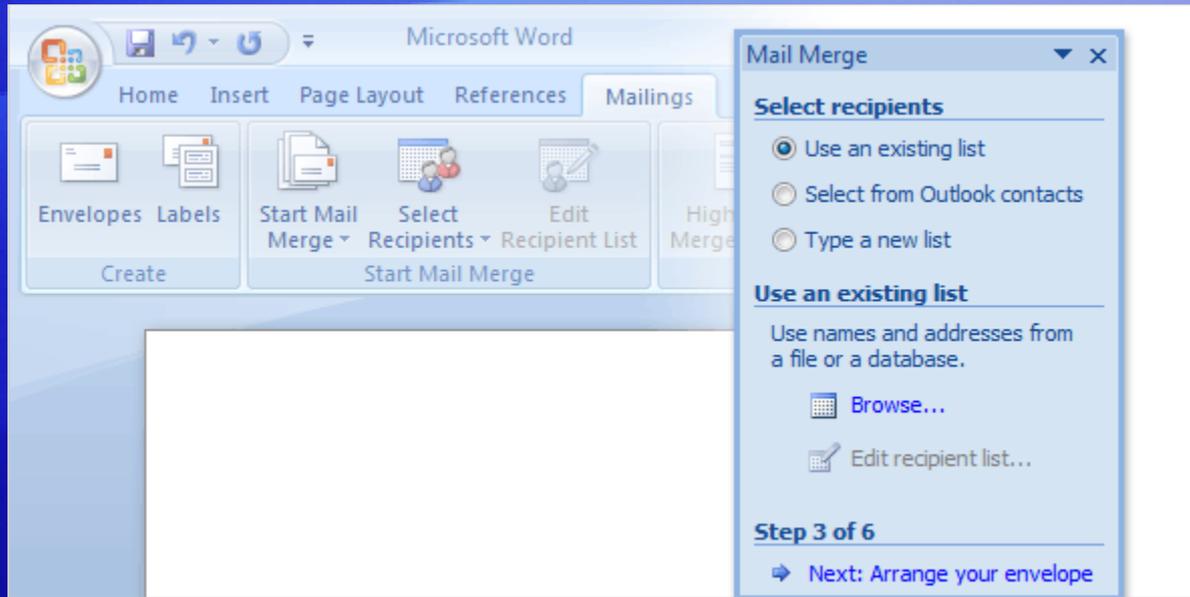
In Step 3, you connect to the recipient list that you want to merge into your documents.

You have three options.

Use an existing list. If you already have a recipient list that contains the information you want to merge, select this option.

Then, click **Browse** in the wizard to locate and open that file.

Connect to the recipient list



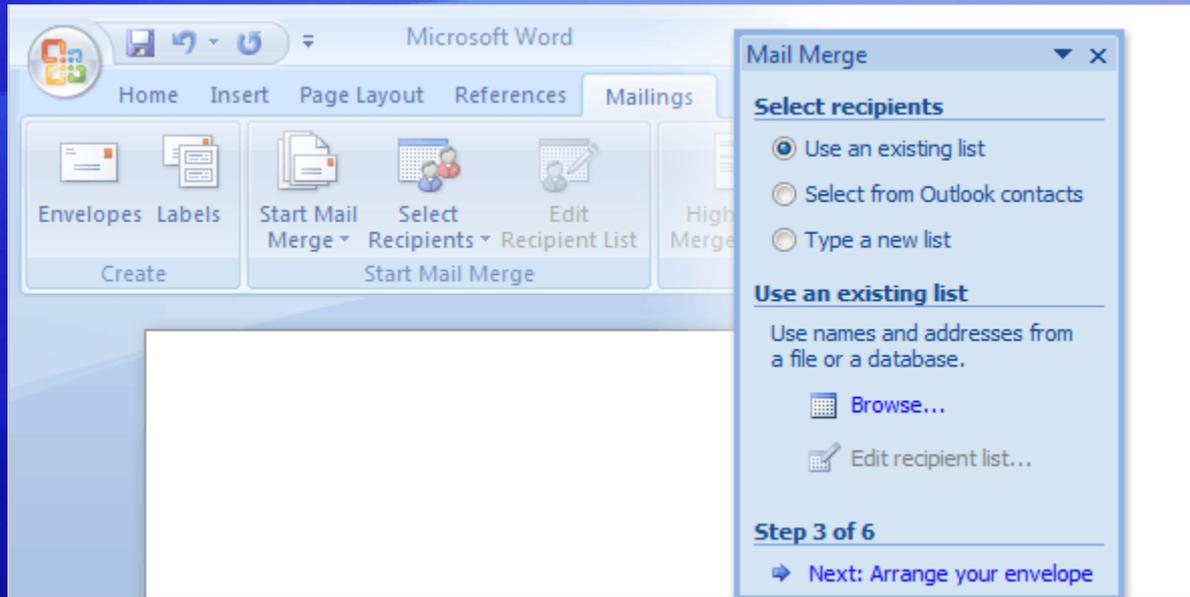
In Step 3, you connect to the recipient list that you want to merge into your documents.

You have three options.

Select from Outlook contacts. If you want to use your Outlook contacts list as your recipient list, select this option.

Then, click **Choose Contacts Folder** to locate and open the correct contacts list.

Connect to the recipient list



In Step 3, you connect to the recipient list that you want to merge into your documents.

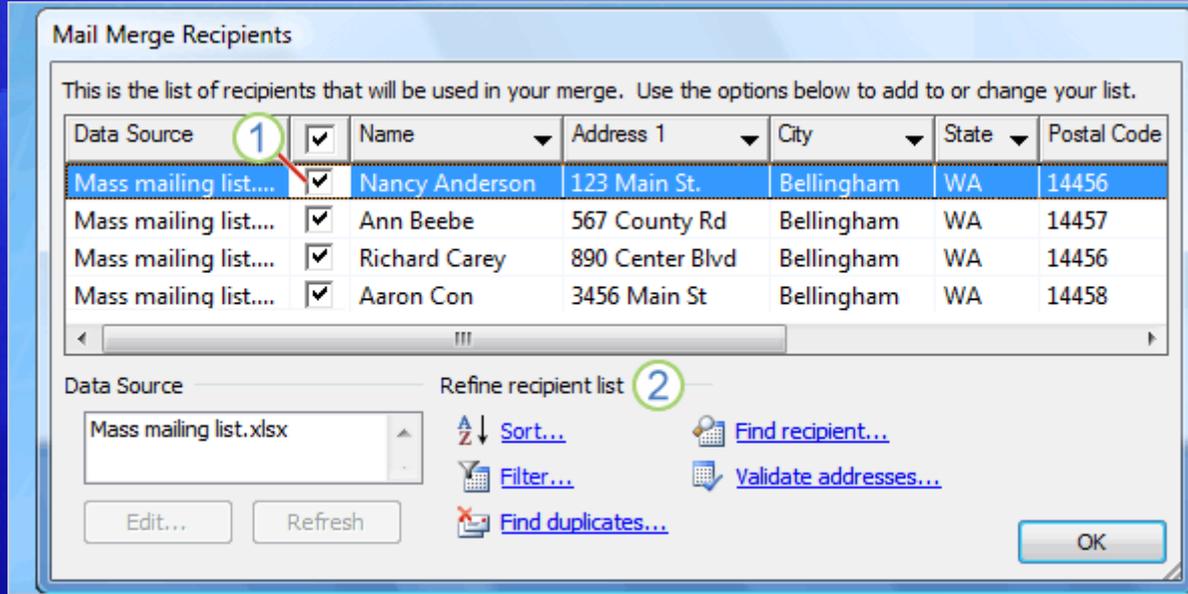
You have three options.

Type a new list. If you don't have an appropriate recipient list and want to create one, select this option. The new list is saved as a mailing database (.mdb) file in the **My Data Sources** folder, which is located in your Documents or My Documents folder.

You can reuse the file for future mail merges.

Mail merge I: Use mail merge for mass mailings

Choose the recipients for your mailing

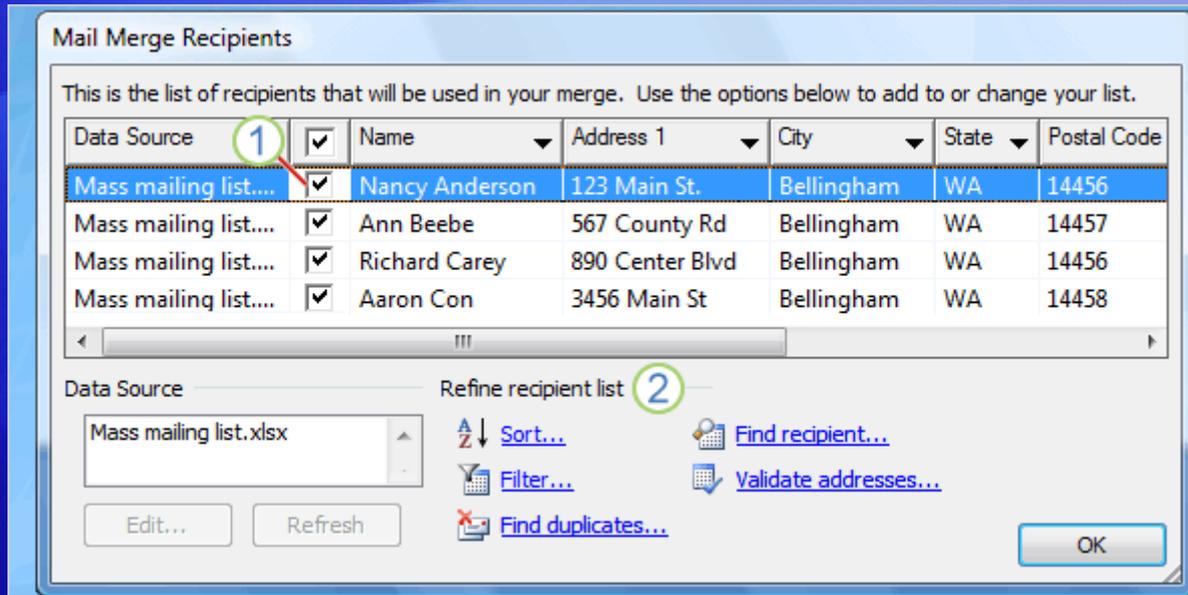


After you connect to the recipient list, you choose the recipients that you want to include in your mailing.

For example, you might want to send a form letter to only those customers in your file with a specific postal code.

Or, you might want to create a directory that includes only one product line.

Choose the recipients for your mailing

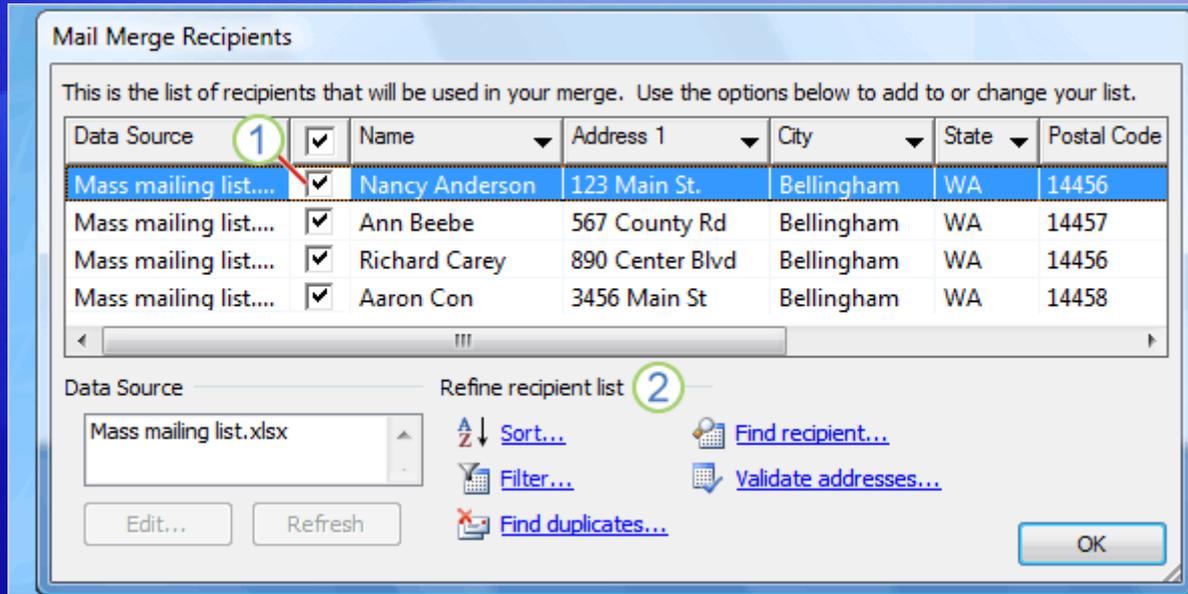


You do all this in the **Mail Merge Recipients** dialog box, which opens automatically after you connect to or create a recipient list.

- 1 All the recipients have a check mark next to their name and are included in the mailing by default.

Mail merge I: Use mail merge for mass mailings

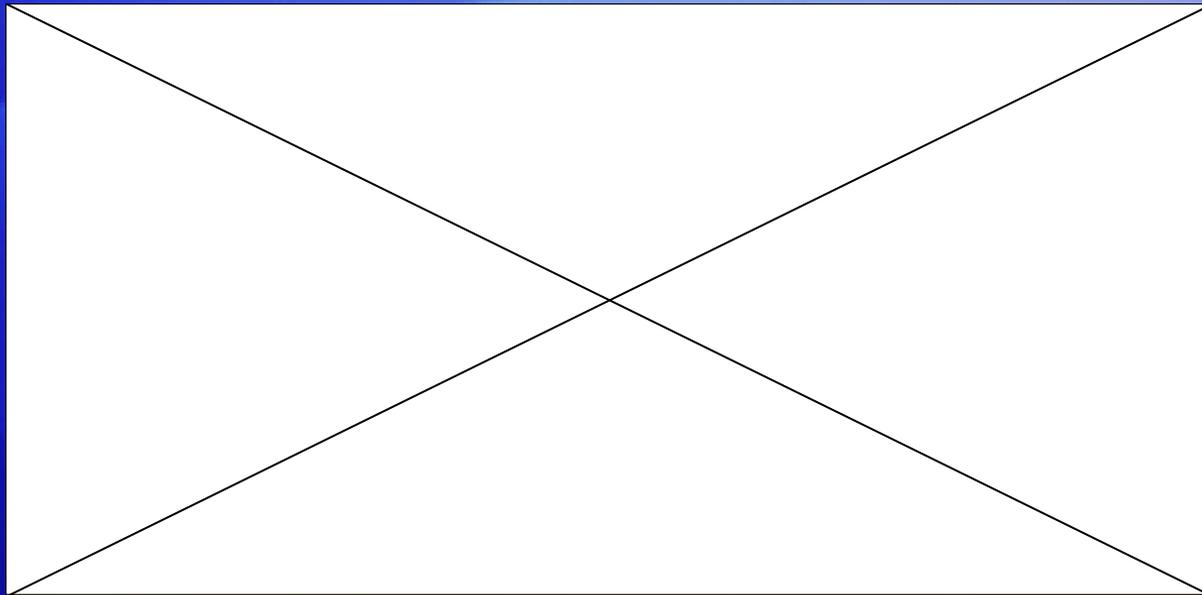
Choose the recipients for your mailing



You do all this in the **Mail Merge Recipients** dialog box, which opens automatically after you connect to or create a recipient list.

- 2 Refine the recipient list by clicking **Sort...** to choose the column name that you want to view and arrange (either ascending or descending); or clicking **Filter...** to enter the fields and values of the recipients that you want to view.

Arrange the main document



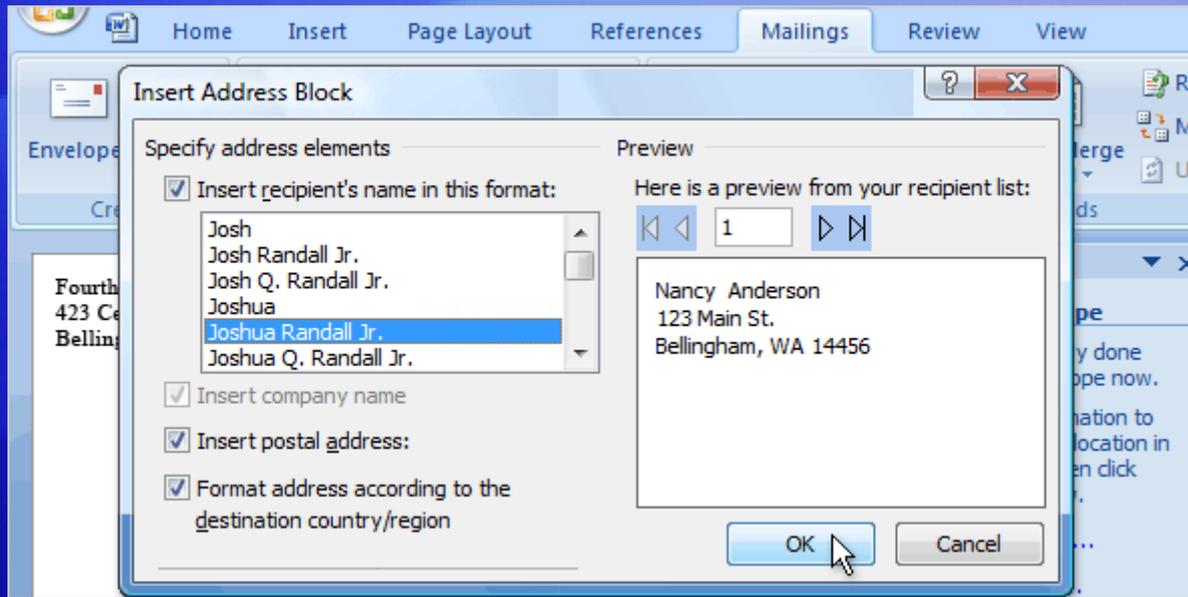
Next, you **arrange** the main document, which means putting content into it.

Animation: Right-click, and click **Play**.

That content consists of information that stays the same in each merged copy, and placeholders (fields) for the recipient information in each merged copy.

The animation shows how to arrange an envelope.

Arrange the main document

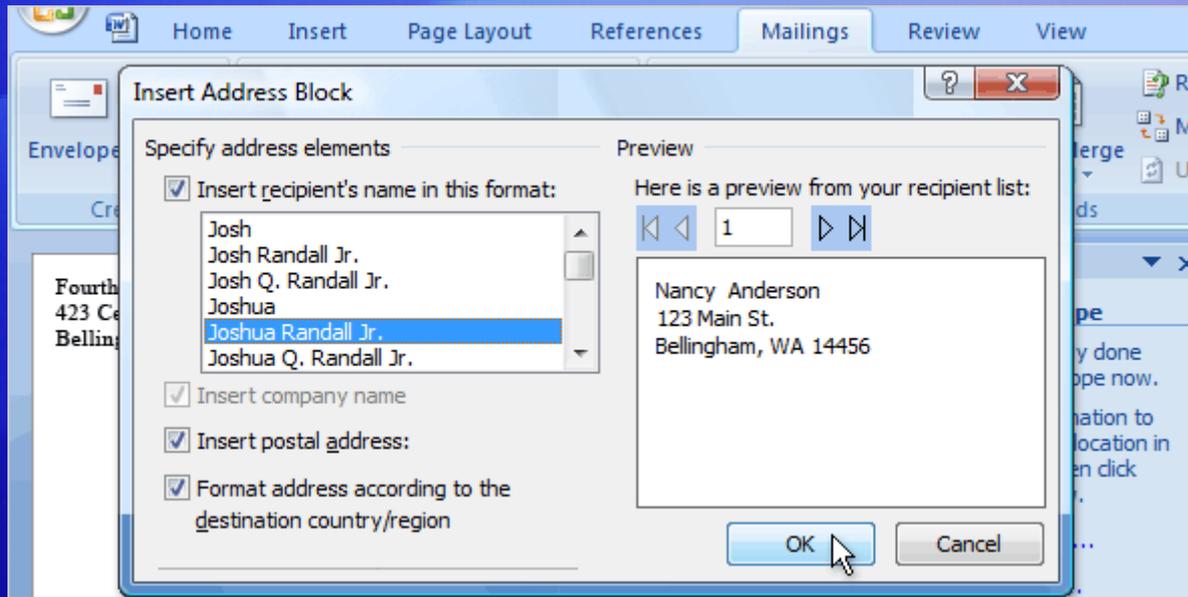


Next, you **arrange** the main document, which means putting content into it: the information that stays the same in each merged copy, and placeholders for the recipient data in each merged copy.

For an envelope, the information that stays the same in each merged copy is the return address that you type in the upper left corner. The placeholders are the addresses of each recipient.

Mail merge I: Use mail merge for mass mailings

Arrange the main document

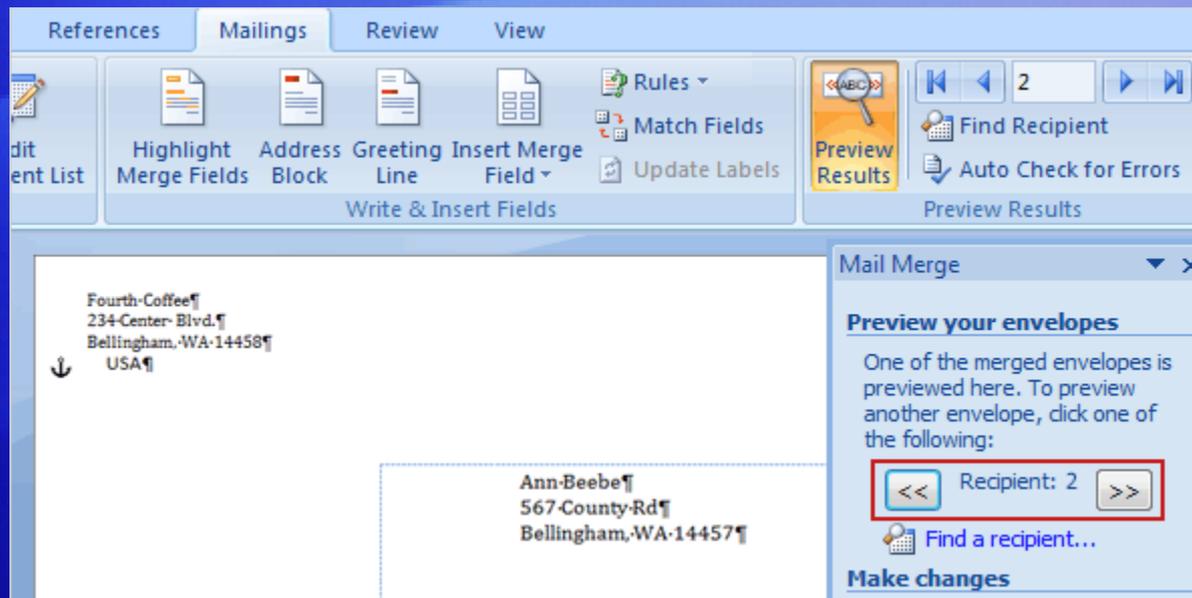


The quickest way to add a delivery address is to click **Address block** in the wizard.

It adds a pre-designed «AddressBlock» field to the envelope, which includes First Name, Last Name, Street Address, City, State, and Postal Code.

Mail merge I: Use mail merge for mass mailings

Preview



After you've added all the content and fields to the main document, you're ready to preview how the merged documents will look.

When you click **Next** at the bottom of the wizard to move to the next step, the first merged document automatically appears.

Mail merge I: Use mail merge for mass mailings

Preview

Depending on how the first document looks, you have several choices:

- If things don't look right, click **Previous** at the bottom of the wizard. By returning to the previous step, you can add, delete, or match fields, or make other corrections so that the information is displayed correctly.
- If things look good, click the double right arrow button  at the top of the wizard to page through a few more of the merged documents, as shown in the picture.

Preview

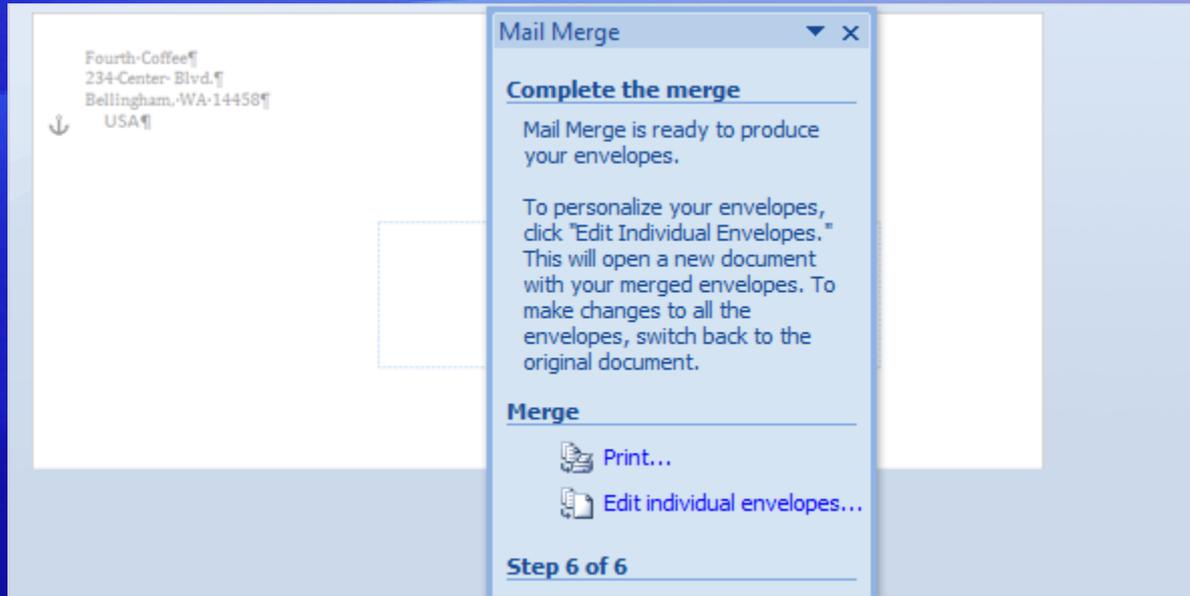
Depending on how the first document looks, you have several choices:

- If you want to view the merged document for a particular recipient, click **Find a recipient** to search for that person. As you page through the documents, you can exclude any person from the merge by clicking **Exclude this recipient**.

Note that you're excluding a recipient only from the final merge results, not deleting anything from the recipient list.

- If you realize that the merge includes some recipients you don't actually want to include, click **Edit recipient list** to open the **Mail Merge Recipients** dialog box. As described previously, you can use this dialog box to narrow down the recipient list.

Complete the merge



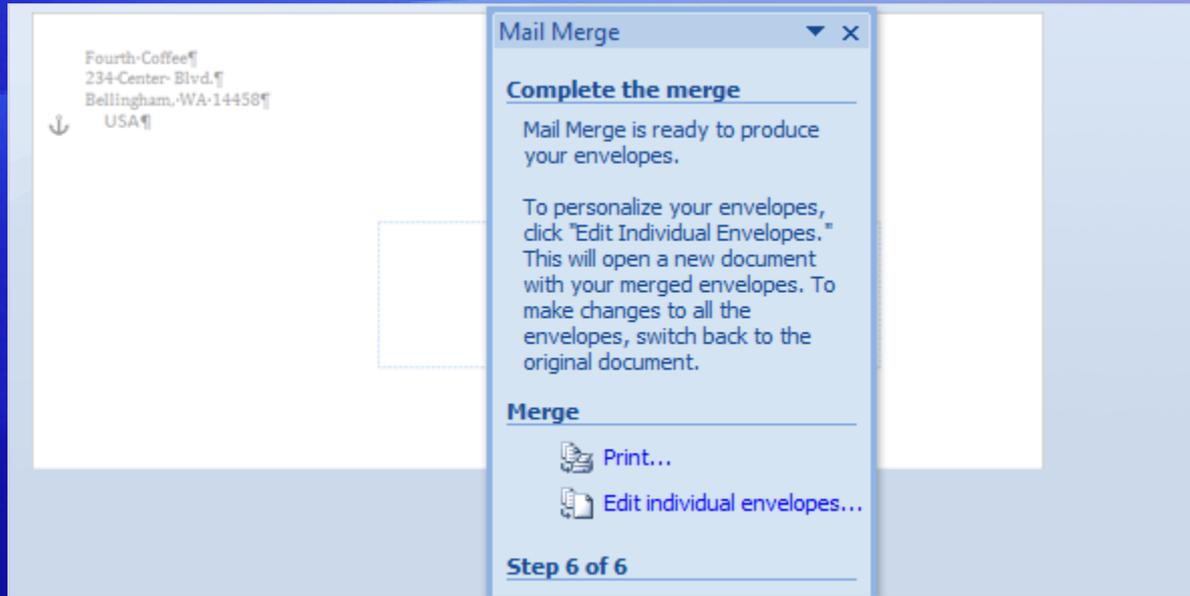
When you're satisfied with previews of the merged documents, you're ready to print the final results.

Click **Print** to open the **Merge to Printer** dialog box.

Last minute changes?

If you still want one more chance to review the results, or if you want to customize selected envelopes, click **Edit individual envelopes** in the wizard.

Complete the merge



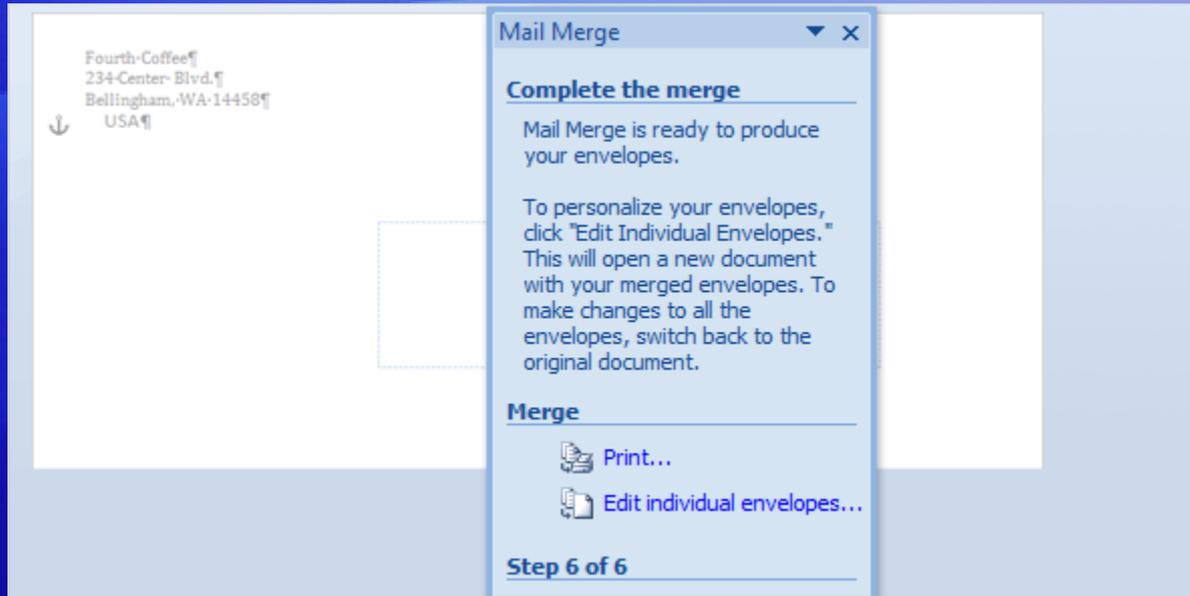
When you're satisfied with previews of the merged documents, you're ready to print the final results.

Click **Print** to open the **Merge to Printer** dialog box.

This creates a separate comprehensive merge that contains all the envelopes in a new Word document.

After you review or modify the envelopes in this comprehensive document, you can print them immediately.

Complete the merge



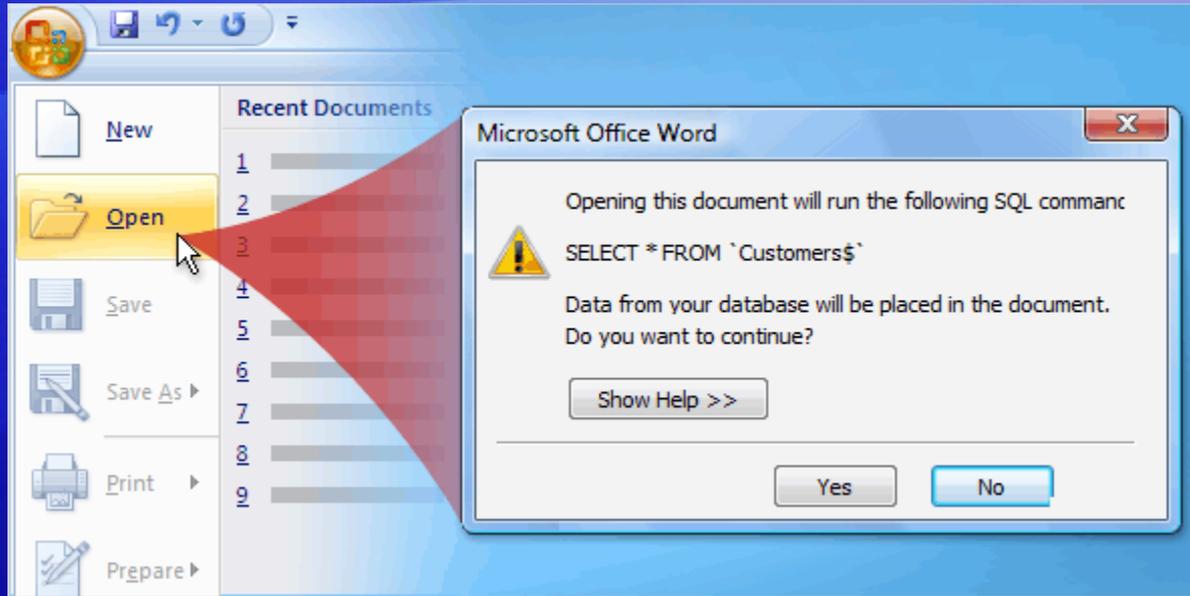
When you're satisfied with previews of the merged documents, you're ready to print the final results.

Click **Print** to open the **Merge to Printer** dialog box.

Or, just save the document and print the envelopes later. If you want to keep the changes you made to individual envelopes, make sure you save this document.

This comprehensive document is separate from the main document and will be larger in size.

Cancel or resume a merge

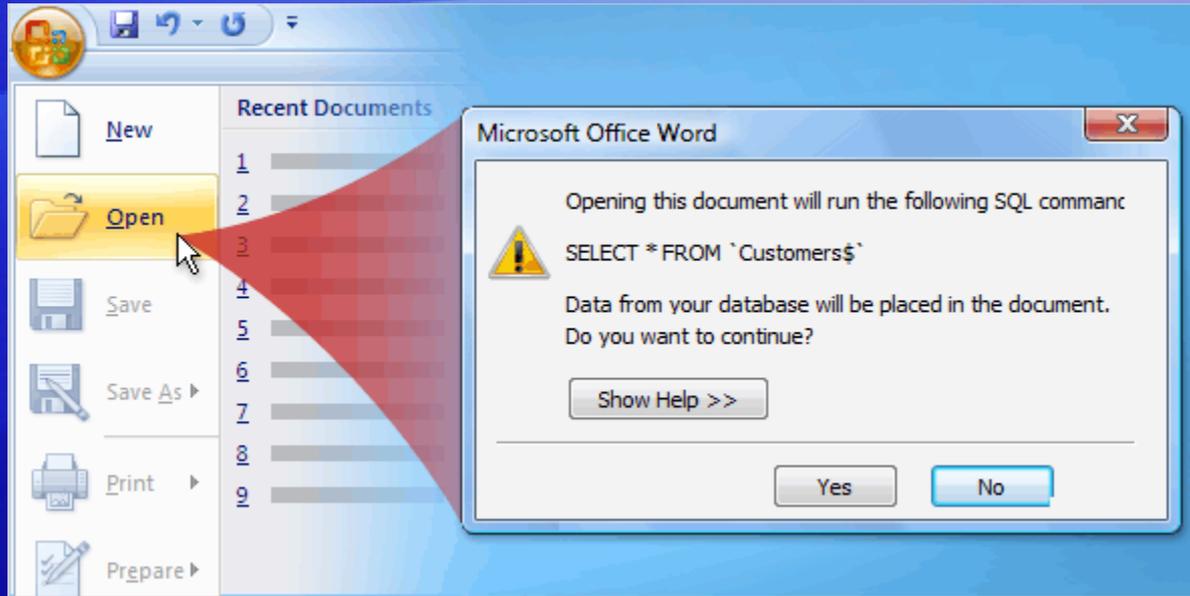


You can cancel your mail merge at any time before completing it.

To do this, close the document and choose not to save the changes. The document will be deleted along with the connection to the recipient list.

But if you just need to stop working on the merge and want to come back to it later, save the main document.

Cancel or resume a merge

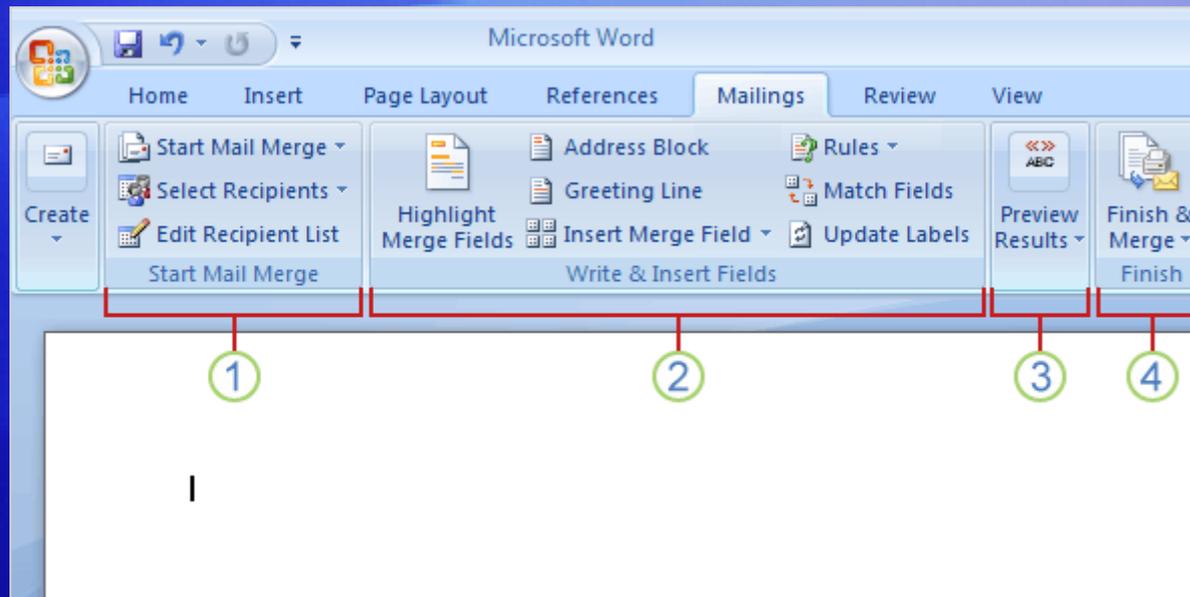


You can cancel your mail merge at any time before completing it.

When you open the document again, Word will ask if you want to keep the connection to the recipient list. Click **Yes** to resume the merge.

Mail merge I: Use mail merge for mass mailings

Introducing mail merges using the Ribbon



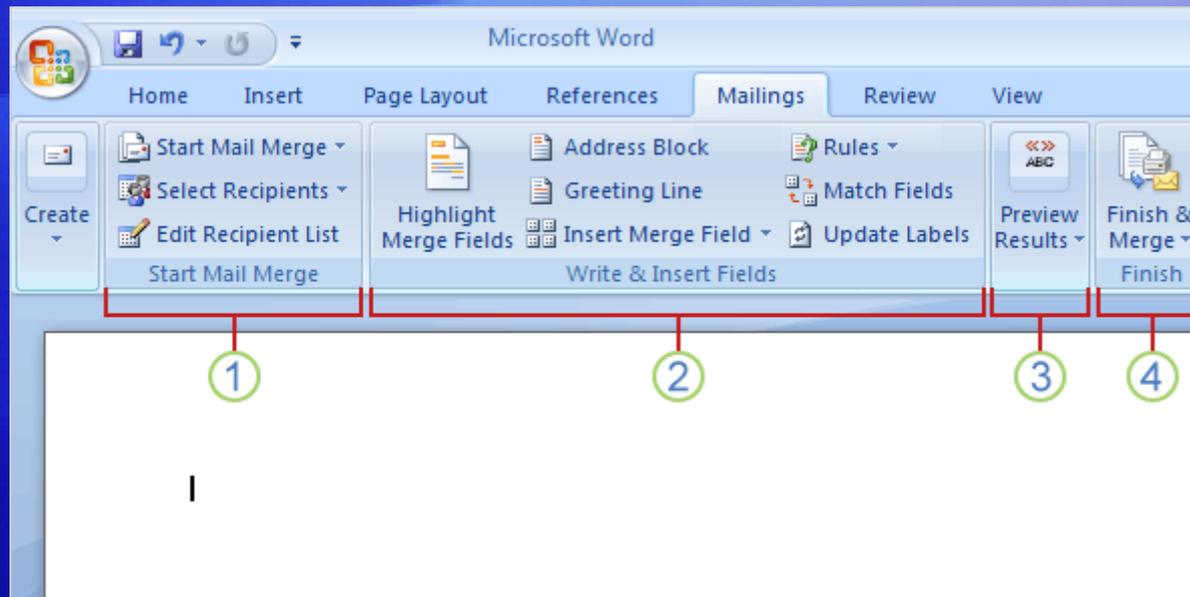
Did you notice that the commands in the **Mailings** tab become available as you step through the wizard?

The Ribbon is also a handy way to do a mail merge and the process is very similar to the steps in the wizard.

Using the Ribbon, you'll have access to more features, such as automatic checking, which looks for errors before you complete the merge.

Mail merge I: Use mail merge for mass mailings

Introducing mail merges using the Ribbon

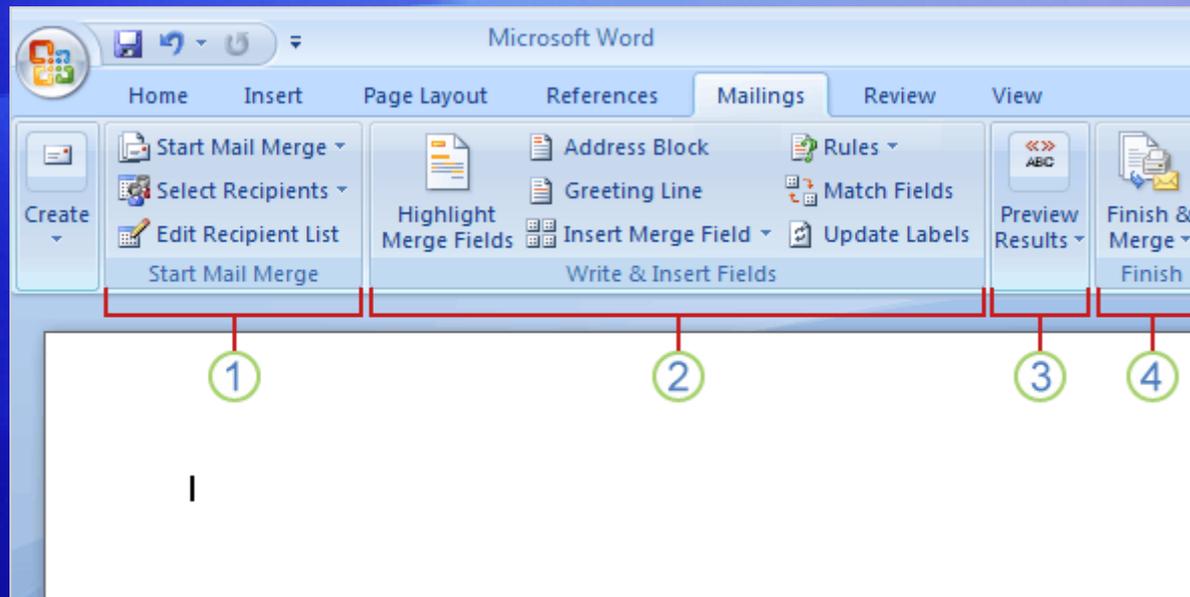


The commands you use on the **Mailings** tab are in these four groups.

- ① **Start Mail Merge.** This is beginning point where you pick a document type and then select, create, or edit the recipient list.
- ② **Write & Insert Fields.** Here's where you can insert the merge fields, match your fields, and use **Rules** to perform actions in your documents.

Mail merge I: Use mail merge for mass mailings

Introducing mail merges using the Ribbon



The commands you use on the **Mailings** tab are in these four groups.

- 3 **Preview Results.** Besides viewing the individual merged documents, you can use an automatic error checking feature.
- 4 **Finish.** Complete the merge and combine your individual documents into one comprehensive document, or print them out, or send them electronically.

Mail merge I: Use mail merge for mass mailings

Suggestions for practice

1. Open the Mail Merge Wizard and set up the main document.
2. Connect to your recipient list and choose the people you want to send mail to.
3. Type content and insert fields.
4. Preview and match fields.
5. Complete the merge.

[Online practice](#) (requires Word 2007)

Test 3, question 1

How do you open the Mail Merge Wizard? (Pick one answer.)

1. Click the **Microsoft Office Button**, and then **Word Options**.
2. On the **Mailings** tab, click **Start Mail Merge**.
3. On the **Insert** tab, click **Quick Parts**.

Test 3, question 1: Answer

On the **Mailings** tab, click **Start Mail Merge**.

Mail merge I: Use mail merge for
mass mailings

Test 3, question 2

How do you exclude a person from a mail merge? (Pick one answer.)

1. Delete all the information in the recipient list for that person.
2. Delete the document addressed to that person when you preview the merge.
3. Use the check boxes in the **Mail Merge Recipients** dialog box.

Test 3, question 2: Answer

Use the check boxes in the **Mail Merge Recipients** dialog box.

The **Mail Merge Recipients** dialog box is where you can designate the people that will be included in the final merge.

Test 3, question 3

After you choose to preview your documents, the merge is complete and you can't make changes. (Pick one answer.)

1. True.
2. False.

Test 3, question 3: Answer

False.

Preview gives you a chance to look at your merged documents before the merge is complete.

Quick Reference Card

For a summary of the tasks covered in this course, view the [Quick Reference Card](#).

JohnRouda.com presents:

Microsoft® Office Word 2007 Training

**Reuse text and other document
parts: Introducing building blocks**

Course contents

- Overview: What you need is built in
- Lesson 1: Get acquainted with building blocks
- Lesson 2: Swap, format, and remove document building blocks
- Lesson 3: Find and organize document building blocks

Each lesson includes a list of suggested tasks and a set of test questions.

Reuse text and other document parts:
Introducing building blocks

Overview: What you need is built in



Document parts, such as headers and footers, cover pages, and boilerplate text, are central to building any professional-looking document.

In Word 2007, you can choose from many built-in document parts and use them again and again, whenever you need them.

With these building blocks, you'll never again struggle to build a cover page or any other critical part of your document at the last minute.

Reuse text and other document parts:
Introducing building blocks

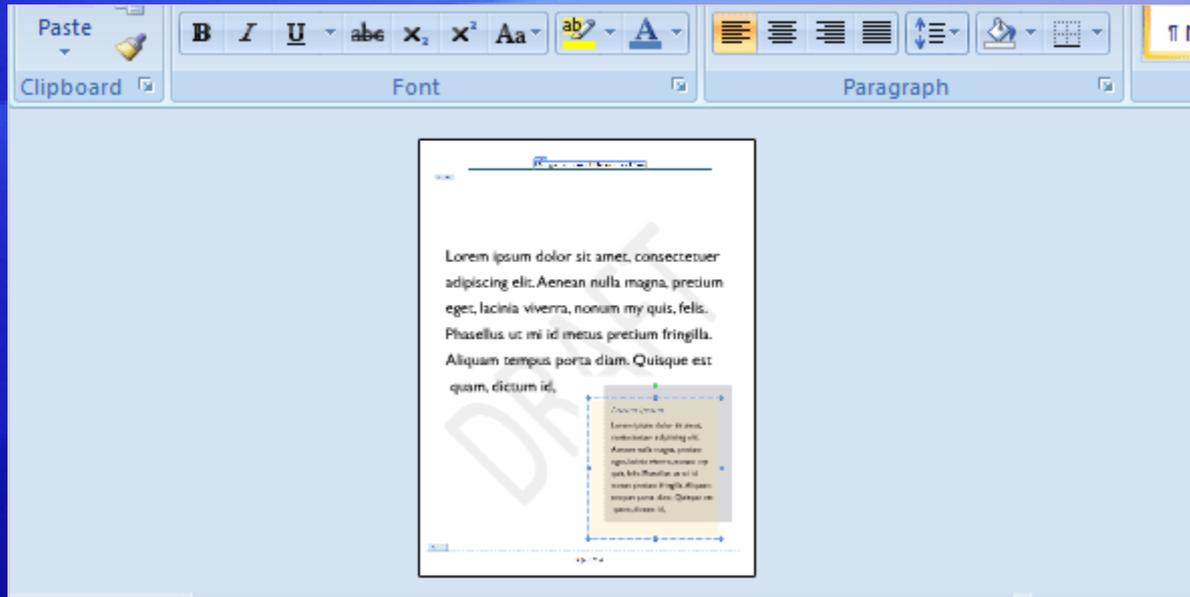
Course goals

- Locate and identify document parts in Word 2007.
- Create a document part and add it to a gallery.
- Create boilerplate text and add it to a gallery.
- Make formatting changes to a document part.
- Swap one document part for another.
- Find a document part to add to your document.

Lesson 1

Get acquainted with building
blocks

Get acquainted with building blocks

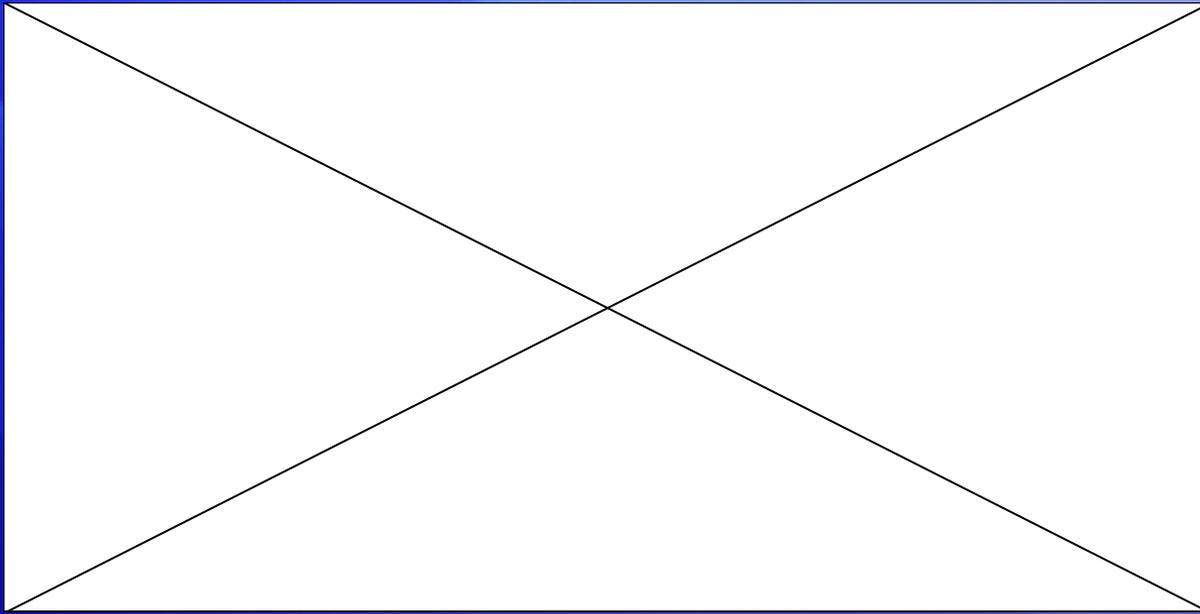


We've all been faced with the drama of a blank page and a deadline, knowing what needs to be in the document but not knowing how to get the parts there quickly and with polish.

Word 2007 extends some of the familiar document parts — such as headers and footers, cover pages, and tables of contents — with galleries of well-designed and formatted parts that you can insert in your document with just a click or two.

Reuse text and other document parts:
Introducing building blocks

Get acquainted with building blocks



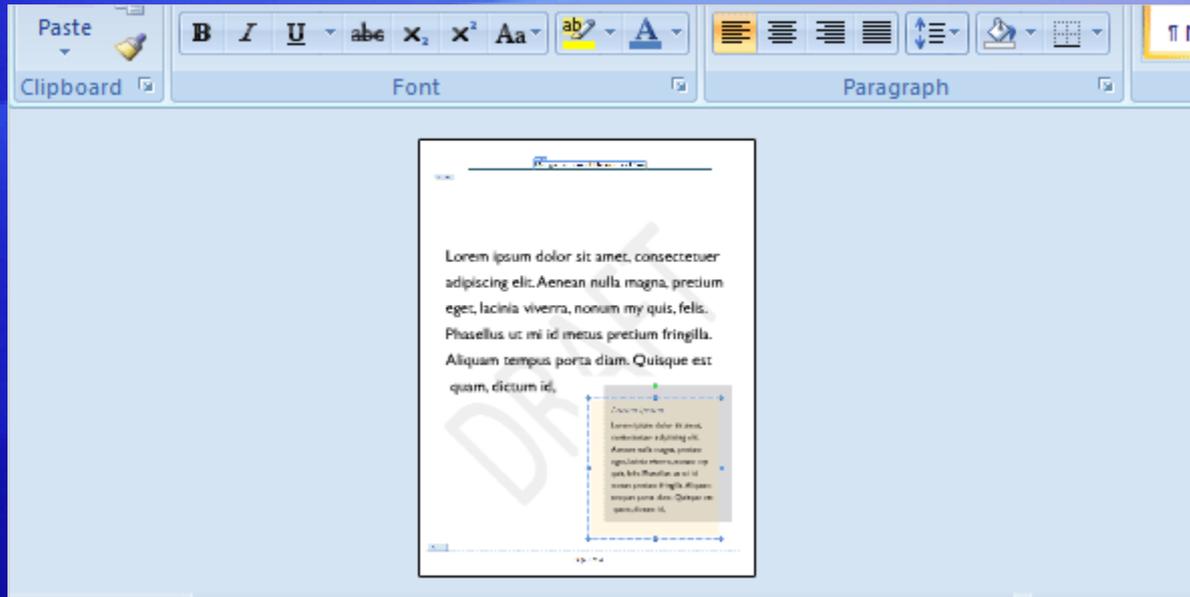
Because the document parts you've known have changed so much in Word 2007, let's call these newly enhanced document parts **building blocks**.

Animation: Right-click, and click **Play**.

You can think of a completed Word document as a file made up of regular content, such as plain text, pages, and photos or other document objects, and other optional building blocks that you can add to complete your document.

Reuse text and other document parts:
Introducing building blocks

Get acquainted with building blocks

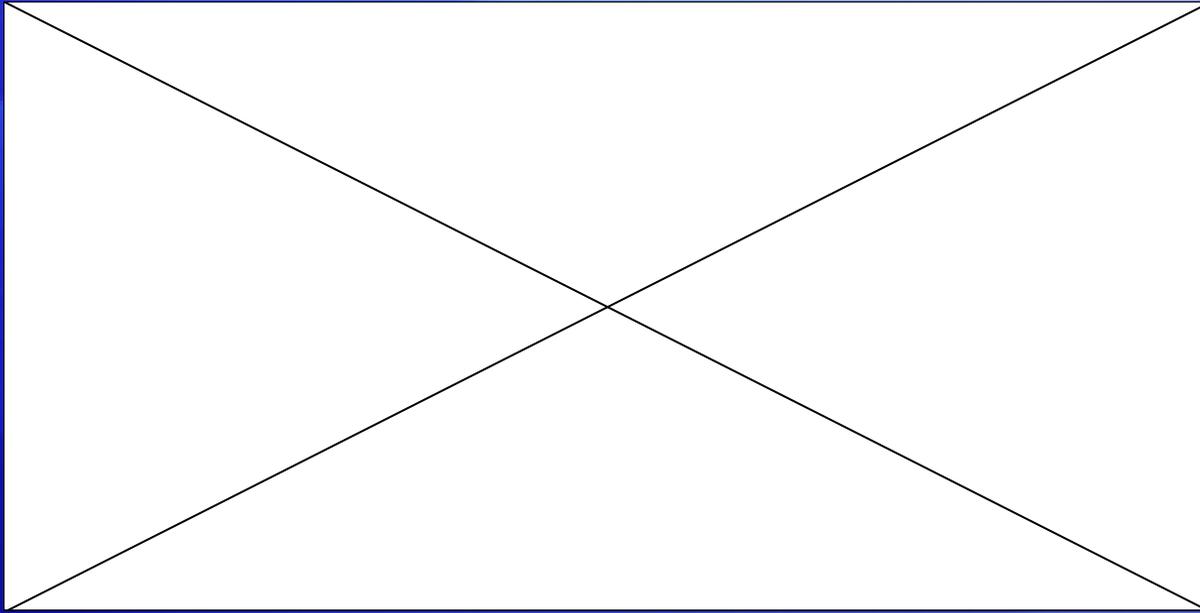


Because the document parts you've known have changed so much in Word 2007, let's call these newly enhanced document parts **building blocks**.

You can think of a completed Word document as a file made up of regular content, such as plain text, pages, and photos or other document objects, and other optional building blocks that you can add to complete your document.

Reuse text and other document parts:
Introducing building blocks

Find building blocks in galleries



You'll find building blocks in **galleries** filled with headers and footers, watermarks, tables of contents, cover pages, and even boilerplate text.

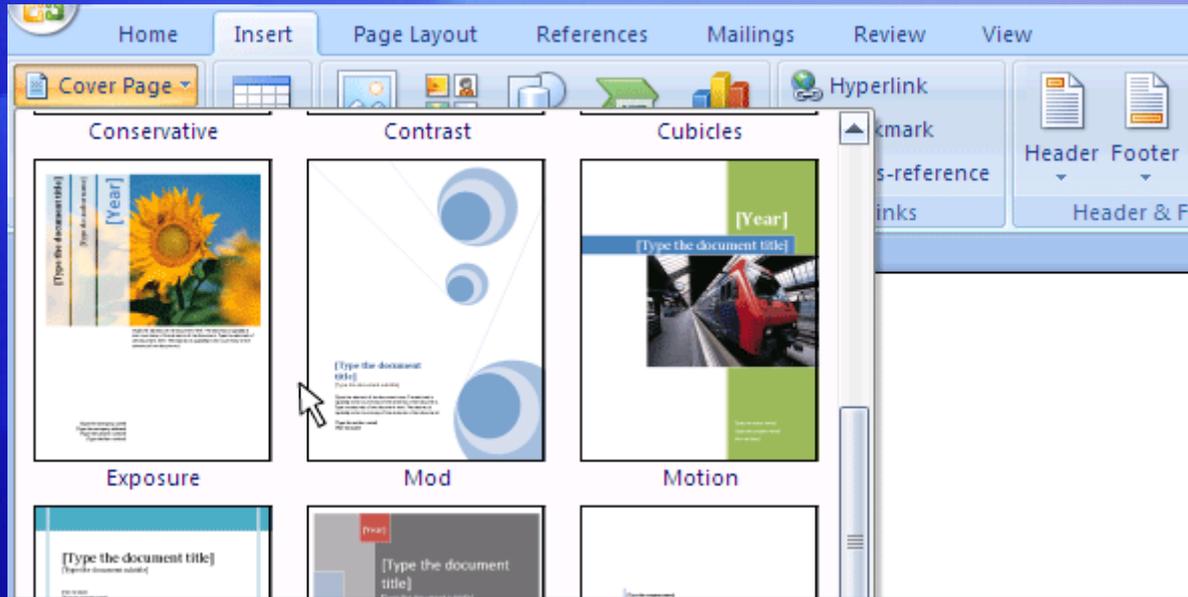
Animation: Right-click, and click **Play**.

And you'll find these galleries, which contain many built-in designs, throughout the tabs on the Ribbon.

Built-in designs save time because you just choose a design and replace the placeholder text with your own.

Reuse text and other document parts:
Introducing building blocks

Finding building blocks in galleries



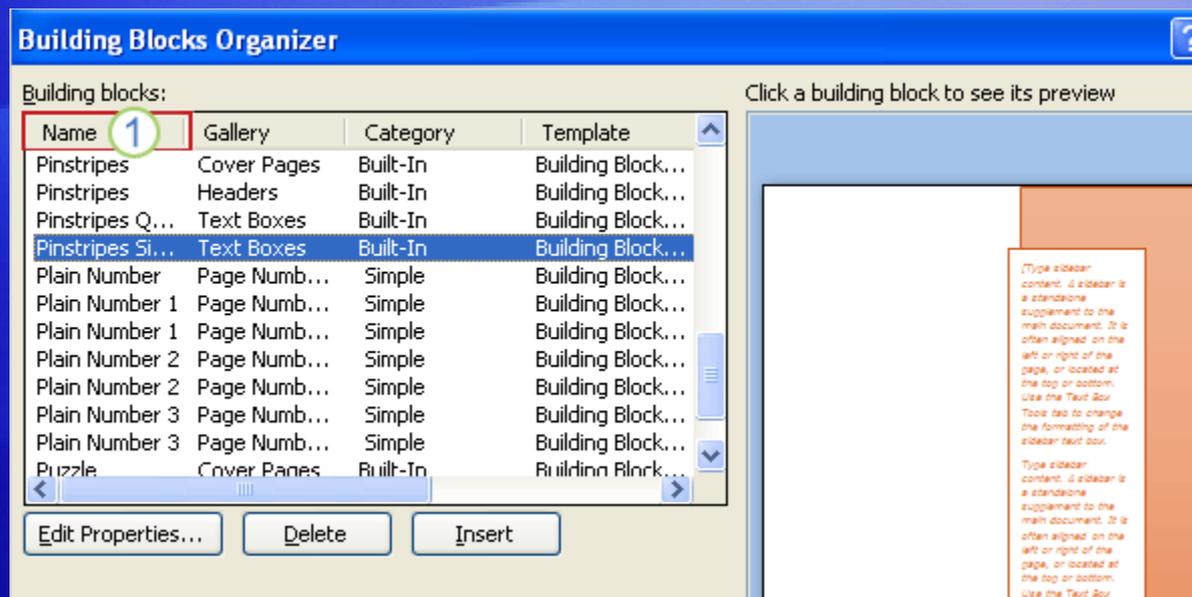
You'll find building blocks in **galleries** filled with headers and footers, watermarks, tables of contents, cover pages, and even boilerplate text.

And you'll find these galleries, which contain many built-in designs, throughout the tabs on the Ribbon.

Built-in designs save time because you just choose a design and replace the placeholder text with your own.

Reuse text and other document parts:
Introducing building blocks

Find all the building blocks in one place



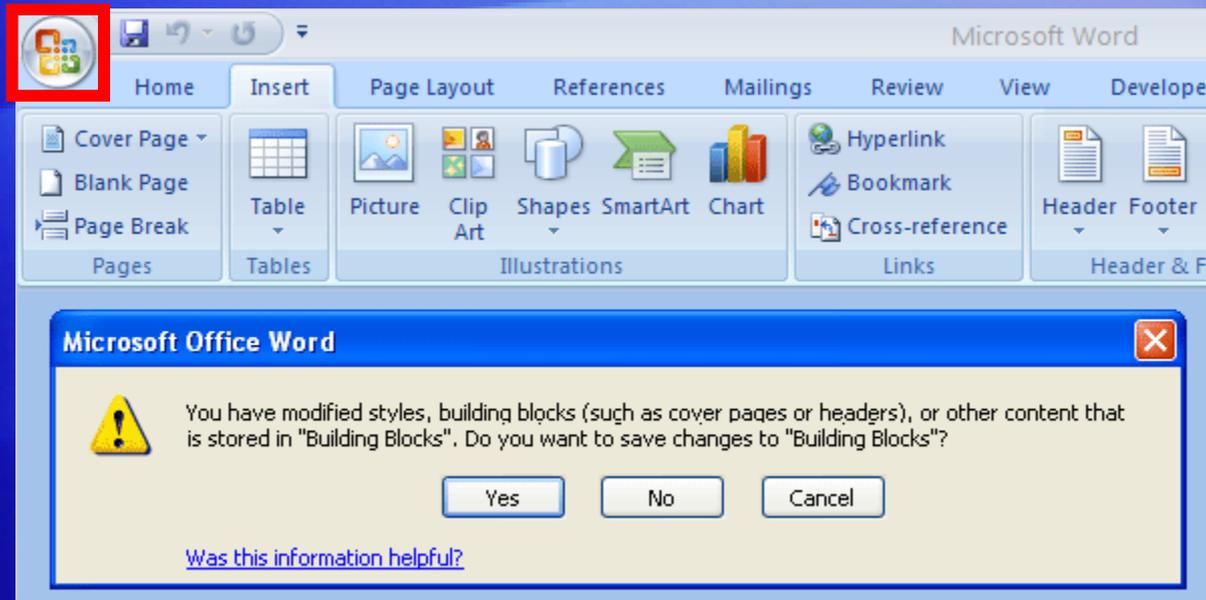
You can find the different kinds of building blocks in their individual galleries.

But the **Building Blocks Organizer** is the single place where you can view and manage all of the building blocks that are available in Word.

You can also use the organizer to find out more about a particular building block or to insert building blocks in your documents.

Reuse text and other document parts:
Introducing building blocks

Save building blocks



You save a document that contains a building block, such as a header or footer, just as you would any other document.

Click the **Microsoft Office Button**, and then click **Save** or **Save As**.

When you exit a session of Word 2007 after making changes to a built-in building block, or after you create or delete a building block, you are asked whether you want to save the changes. Be sure to click **Yes**.

Reuse text and other document parts:
Introducing building blocks

Suggestions for practice

1. Browse the building blocks galleries.
2. Add a building block to a document.
3. Add a cover page.

[Online practice](#) (requires Word 2007)

Test 1, question 1

Which of the following are building blocks? (Pick one answer.)

1. Text and pictures.
2. Shapes, SmartArt graphics, and charts.
3. Headers, footers, and cover pages.

Test 1, question 1: Answer

Headers, footers, and cover pages.

There are many types of building blocks, including headers, footers, cover pages, boilerplate text, and so much more.

Test 1, question 2

Where can you find building blocks? (Pick one answer.)

1. In galleries throughout tabs on the Ribbon.
2. On the **References** tab in the **Building Blocks** group.
3. Click the **Microsoft Office Button**, and then click **Word Options**.

Test 1, question 2: Answer

In galleries throughout tabs on the Ribbon.

Galleries contain many building blocks designed for you to click and use.

Test 1, question 3

A professionally designed document is made up of which of the following: (Pick one answer.)

1. Text, photos, and headers and footers.
2. Text, a table of contents, and a cover page.
3. Text, Quick Styles, and text boxes.
4. All of the above.

Test 1, question 3: Answer

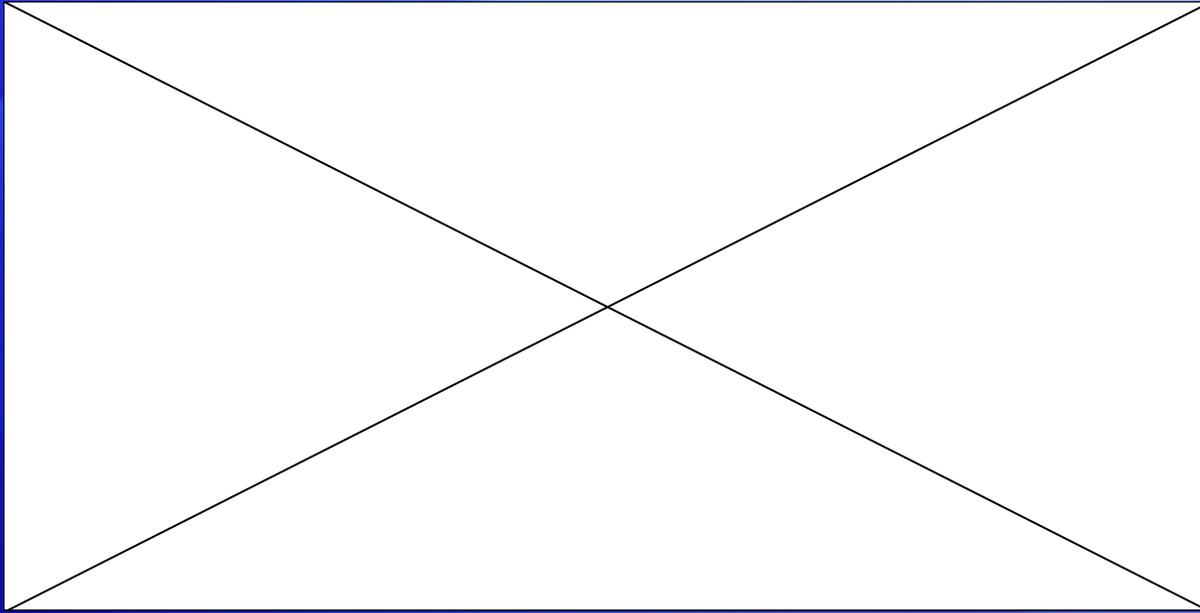
All of the above.

You use building blocks, text, photos, and other document parts to create a well-designed, professional-looking document.

Lesson 2

Swap, format, and remove
document building blocks

Swap, format, and remove building blocks



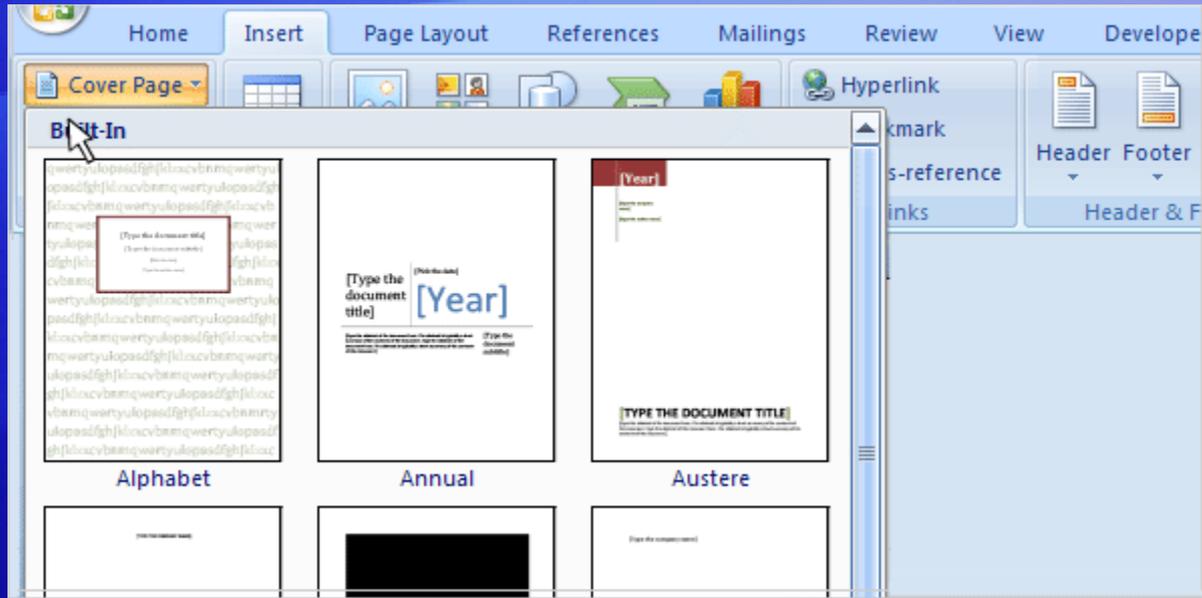
You've added a cover page to your document. What if you decide at the last minute that you want a different cover page design?

Animation: Right-click, and click **Play**.

You can click a new building block design at any time to see how the building block looks in your document. If you already replaced the placeholder text with your own text, you can still change the cover page design with a single click.

Reuse text and other document parts:
Introducing building blocks

Swap, format, and remove building blocks



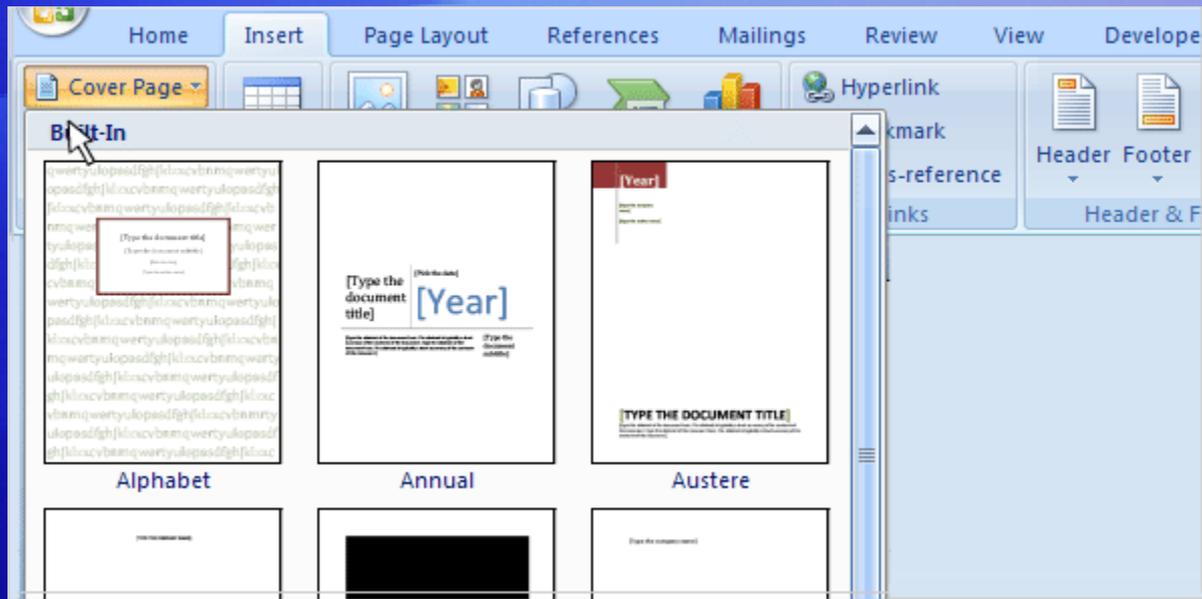
You've added a cover page to your document. What if you decide at the last minute that you want a different cover page design?

You can click a new building block design at any time to see how the building block looks in your document.

If you already replaced the placeholder text with your own text, you can still change the cover page design with a single click.

Reuse text and other document parts:
Introducing building blocks

Swap, format, and remove building blocks



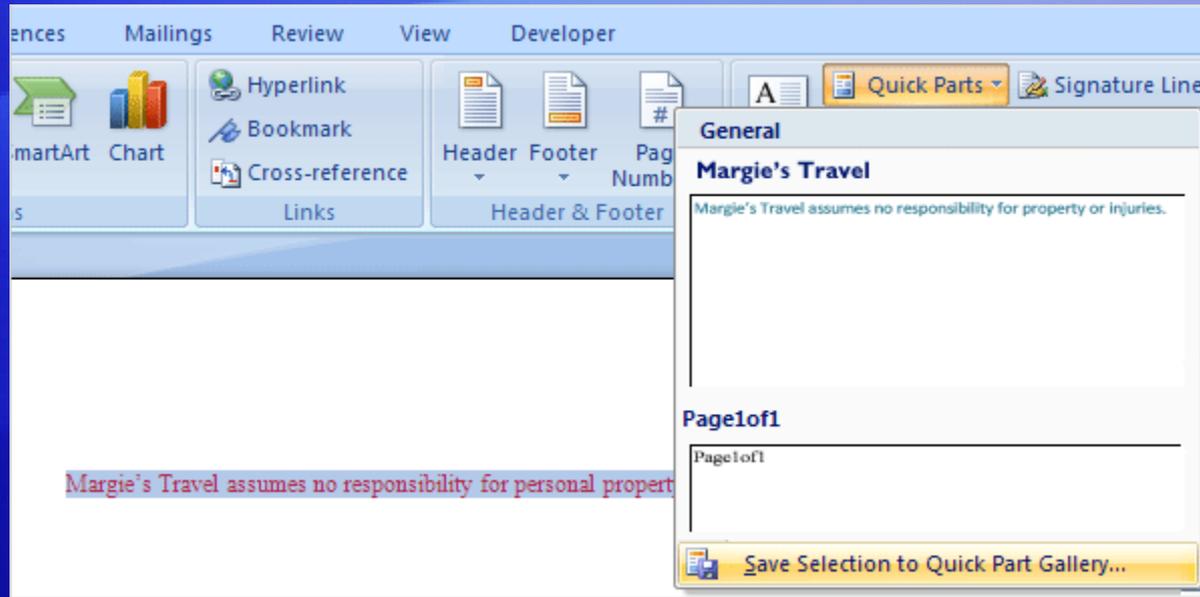
Each building block is made up of different fields called **content controls**.

For example, a content control in a cover page building block might include a title content control and perhaps a date content control.

The important point to remember is that a content control contains information that you can replace with your own text or content.

Reuse text and other document parts:
Introducing building blocks

Create and save boilerplate text

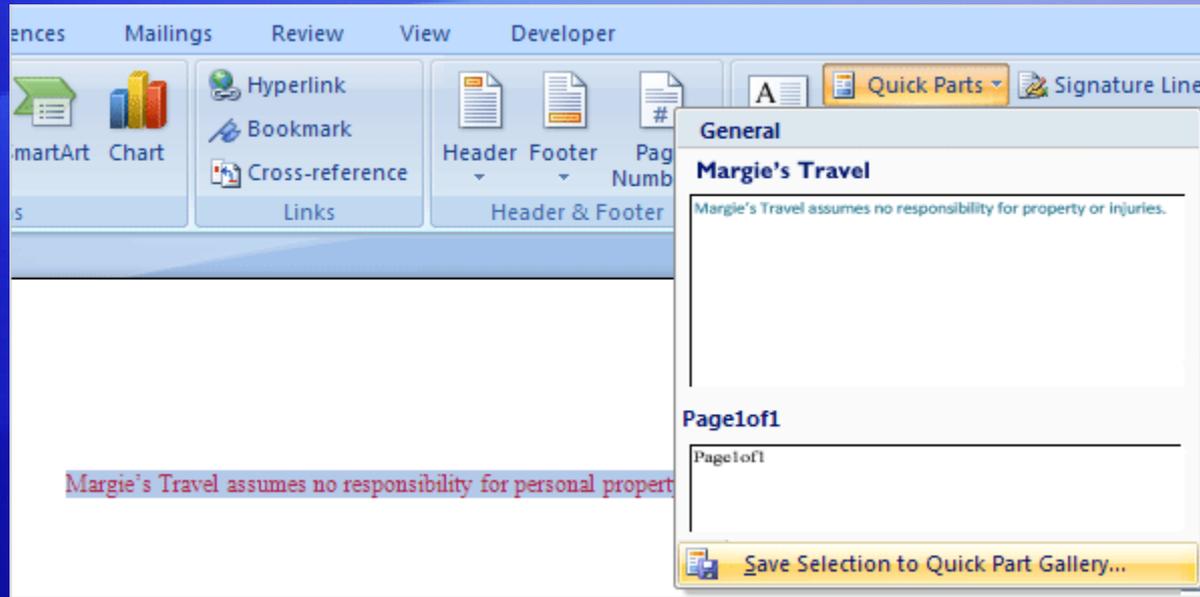


How often do you find yourself re-creating text in the documents you build?

Like cover pages and page numbers, boilerplate text is a common document part that you might want to create in one document and reuse again in this and other documents.

Reuse text and other document parts:
Introducing building blocks

Create and save boilerplate text

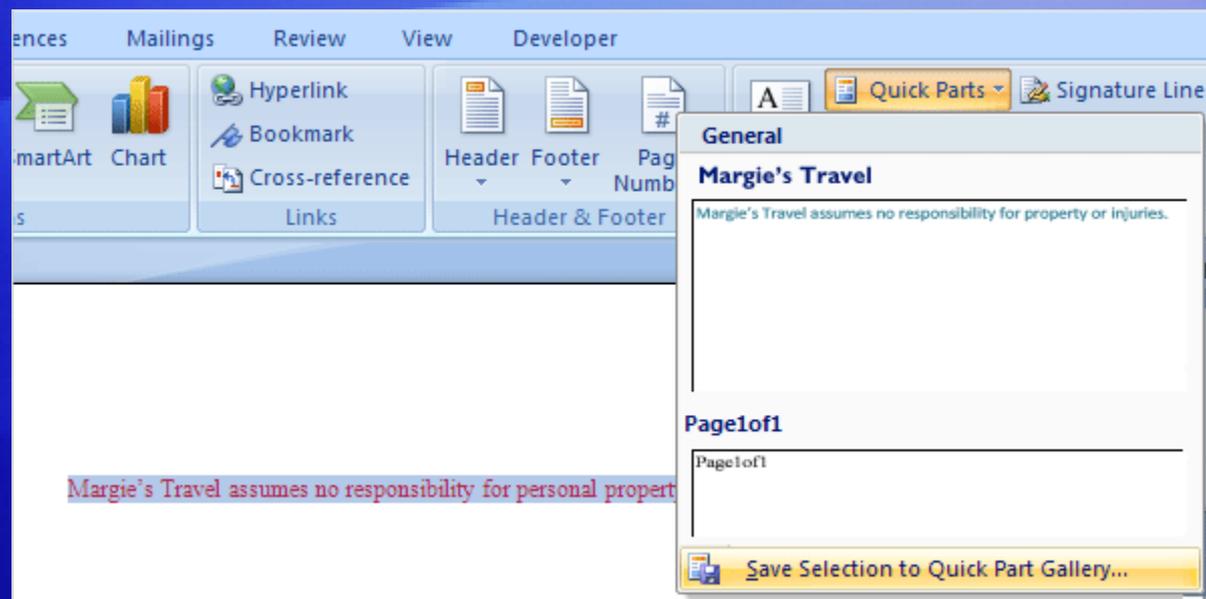


How often do you find yourself re-creating text in the documents you build?

In Word 2007, you can save a text selection to a building block gallery called the **Quick Part Gallery**, where you can easily locate the text to use again and again.

Reuse text and other document parts:
Introducing building blocks

Format building block text



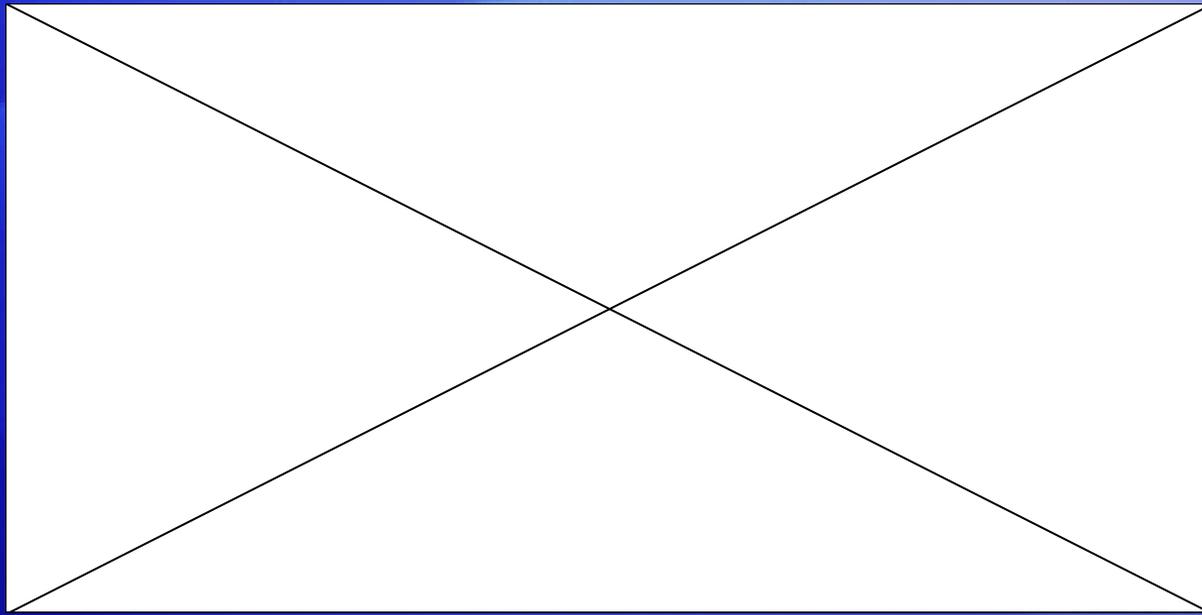
Say you want to make some changes to boilerplate text you already created and saved to the **Quick Part Gallery**.

You can change the font, color, and alignment of the text. You can even redefine the entry for the building blocks gallery so that it's easy to find later.

After you complete your changes, you can select the text and click **Save selection to Quick Part Gallery**.

Reuse text and other document parts:
Introducing building blocks

Remove a building block from a document



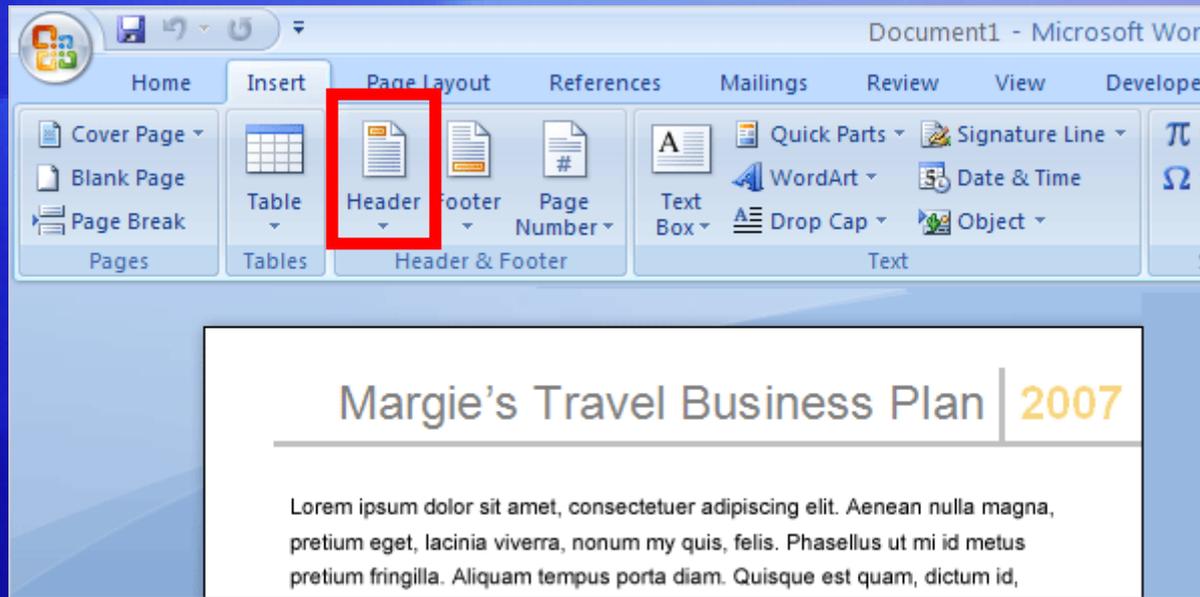
If you decide that you no longer want a building block in your document, you can remove it as quickly as you added it.

Animation: Right-click, and click **Play**.

Most galleries have an option to remove the current building block from the document.

The animation shows the process of removing a header.

Remove a building block from a document



If you decide that you no longer want a building block in your document, you can remove it as quickly as you added it.

Most galleries have an option to remove the current building block from the document.

This picture shows the start of the process of removing a header. On the **Insert** tab, click **Header**, and then click the **Remove Header** command that appears at the bottom of the gallery.

Reuse text and other document parts:
Introducing building blocks

Suggestions for practice

1. Swap one building block design for another.
2. Add boilerplate text to the gallery and save changes to the gallery.
3. Change the building block formatting and save your changes to the gallery.

[Online practice](#) (requires Word 2007)

Test 2, question 1

You decide that the cover page you've chosen is not quite right for your document. What should you do? (Pick one answer.)

1. Delete the cover page.
2. Click a new cover page design in the **Cover Page Gallery**.
3. Edit the existing cover page design.

Test 2, question 1: Answer

Click a new cover page design in the **Cover Page Gallery**.

There are many beautifully designed cover pages to choose from in the Cover Page Gallery.

Test 2, question 2

You have a disclaimer that you regularly reuse in documents. How can you save yourself from retyping the text every time you use it? (Pick one answer.)

1. Copy and paste from one document to another.
2. You can't. You must retype the disclaimer every time you want to use it.
3. Select the text you want to reuse, and save it to the Quick Part Gallery.

Test 2, question 2: Answer

Select the text you want to use, and save it to the **Quick Part Gallery**.

The text you've selected will be available in the gallery to reuse as often as you like.

Test 2, question 3

You can change the font of an existing building block and resave it to the gallery to use again later. (Pick one answer.)

1. True.
2. False.

Test 2, question 3: Answer

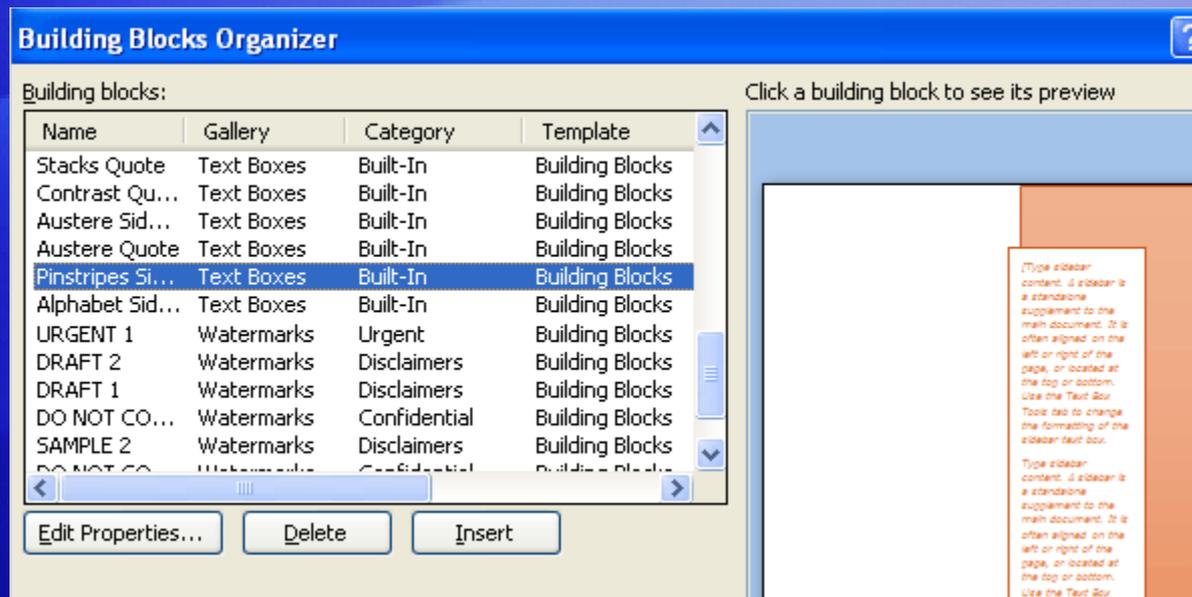
True.

You can reformat and save a building block.

Lesson 3

Find and organize document
building blocks

Find and use document building blocks



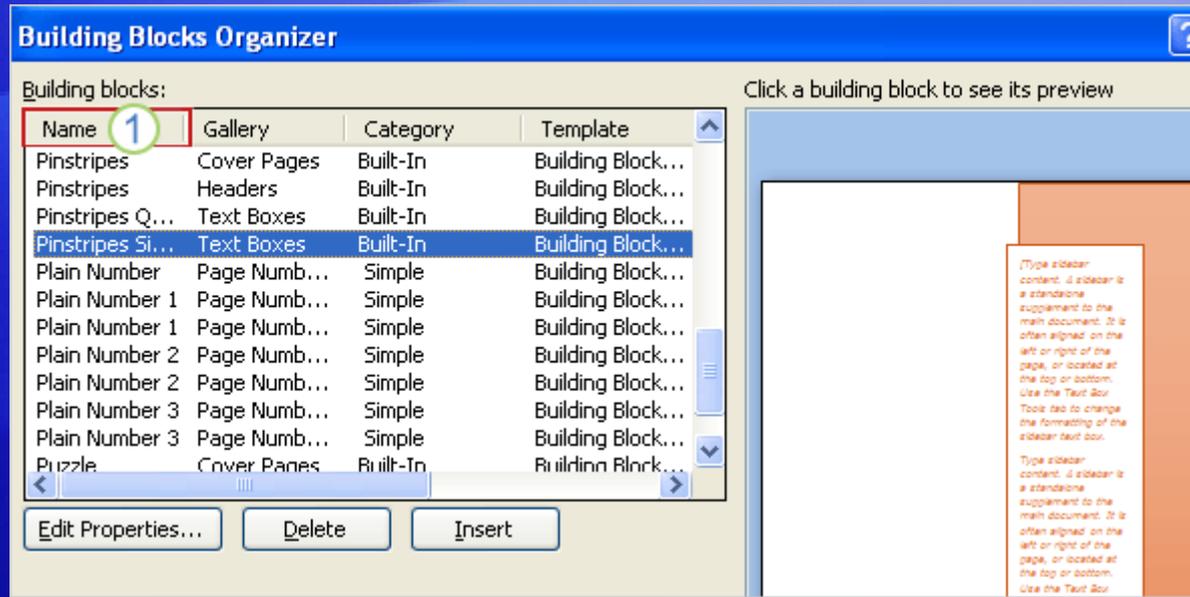
When you're ready to reuse a building block, you can browse the galleries for the building block you want.

Or you can find all of the available building blocks in Word in one place called the **Building Blocks Organizer**.

You open the **Building Blocks Organizer** by right-clicking any building block in a gallery and then clicking **Organize and Delete**.

Reuse text and other document parts:
Introducing building blocks

Sort all of the building blocks in Word

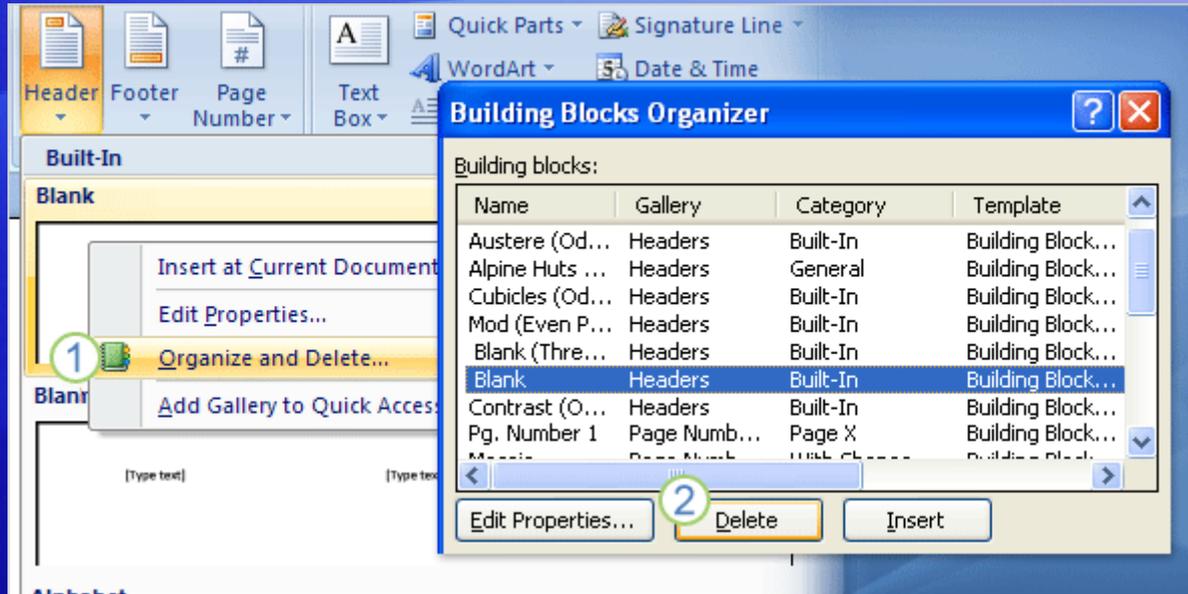


Sorting makes it easier to find the building block you want. You can sort easily in the **Building Blocks Organizer**.

- 1 If you know the name of the piece of text you want, you can find it quickly by clicking **Name** at the top of the column to see all of the building blocks listed in alphabetical order.

Reuse text and other document parts:
Introducing building blocks

Delete document building blocks



You can delete a building block from a document, but you can also permanently delete building block designs from Word.

- 1 Right-click any building block, and then click **Organize and Delete**.
- 2 Click the **Delete** button in the **Building Blocks Organizer** to delete the building block from Word.

Reuse text and other document parts:
Introducing building blocks

Suggestions for practice

1. Find a building block.
2. Delete a building block from a gallery.

[Online practice](#) (requires Word 2007)

Test 3, question 1

You can get to building blocks through galleries on the Ribbon and by using the Building Blocks Organizer. (Pick one answer.)

1. True.
2. False.

Test 3, question 1: Answer

True.

You can find building blocks in galleries and in the **Building Blocks Organizer**, which is available by right-clicking any building block in a gallery and then clicking **Organize and Delete**.

Test 3, question 2

Which of the following can you do from the Building Blocks Organizer? (Pick one answer.)

1. Sort, insert, and delete building blocks.
2. Edit the properties for any building block in Word.
3. Make changes to the content controls in any building block.
4. Both the first and second options.

Test 3, question 2: Answer

Both the first and second options.

These represent the full functionality of the **Building Blocks Organizer**.

Test 3, question 3

How do you delete a building block from Word? (Pick one answer.)

1. You can't delete built-in building blocks or building blocks you create.
2. Right-click the building block, and then click **Delete**.
3. From the **Building Blocks Organizer**, select the building block you want to delete, and then click the **Delete** button.

Test 3, question 3: Answer

From the **Building Blocks Organizer**, select the building block you want to delete, and then click the **Delete** button.

This is the easiest way to delete a building block from the Word building block collection.

Quick Reference Card

For a summary of the tasks covered in this course, view the [Quick Reference Card](#).

Reuse text and other document parts:
Introducing building blocks

JohnRouda.com presents:

Microsoft® Office Word 2007 Training

**Edit text and revise your
documents**

Course contents

- Overview: Moving, selecting, and getting around
- Lesson: Make changes to your document

The lesson concludes with a practice session and a short set of questions to test your understanding of the material.

Overview: Moving, selecting, and getting around



Have you created a Word document and then wondered how to make changes to it?

In this course, you'll learn how to get from one place to another in a document so that you can make changes anywhere on the page.

Then you'll learn how to add and delete text and move it around.

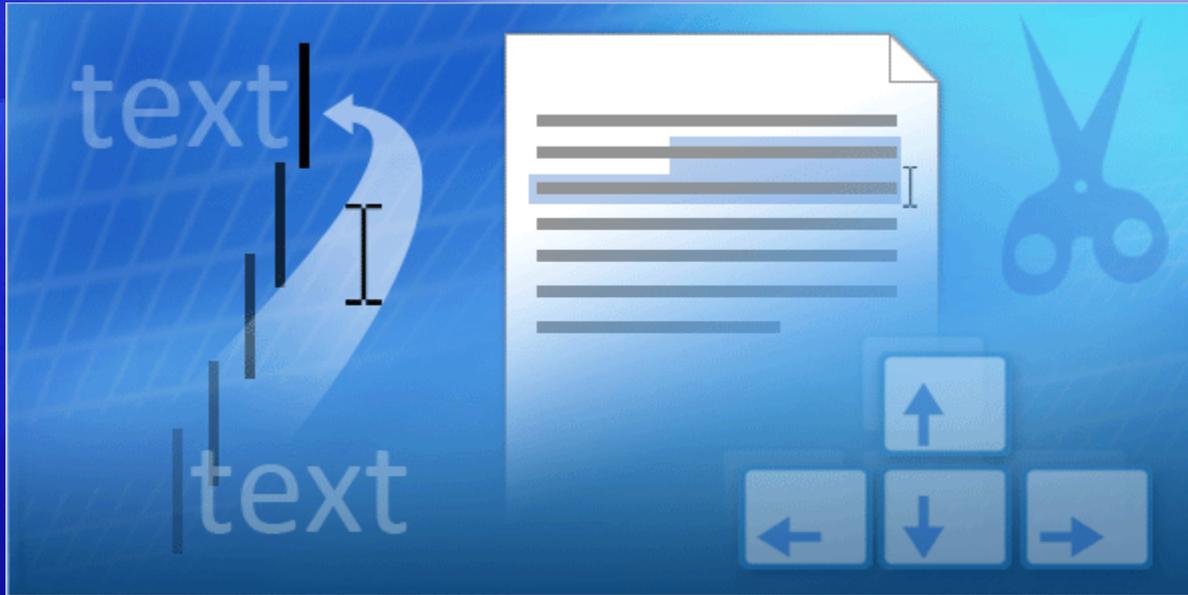
Course goals

- Move the cursor around a document, using either the mouse or the keyboard, so that you can get to where you need to in order to make changes.
- Select text to make revisions.
- Move text by cutting and pasting.

Lesson

Make changes to your document

Make changes to your document



Documents get changed.

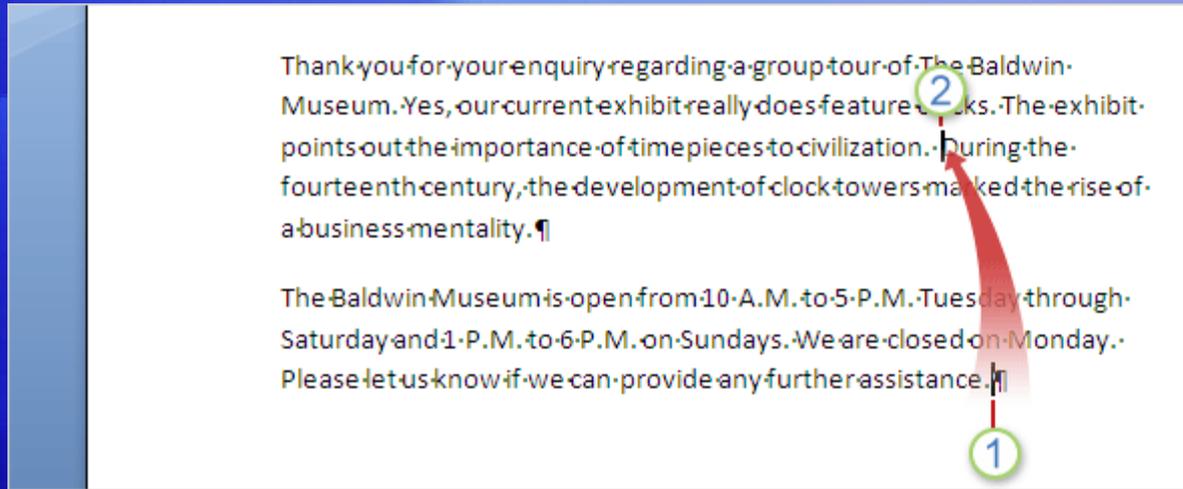
You may make changes as you type, or after you finish the document.

To work quickly and efficiently in the document, you need to know how to move around.

Once you get to the part of the document you want to edit, you'll need to type the new text you want to add, or select the existing text so that you can change or delete it.

Edit text and revise your documents

Move around the document



Imagine that you want to type a new sentence between “civilization” and “During”: “Symphonies and constellations have been named for clocks.”

To type where you want, first move the cursor:

- 1 The **cursor** is the vertical line at the end of the second paragraph, in front of the paragraph mark.
- 2 You can move the cursor to the first paragraph by moving the pointer and then clicking, or by using the keyboard.

Select and delete text

Thank you for your enquiry regarding a group tour of The Baldwin Museum. Yes, our current exhibit really does feature clocks. The exhibit points out the importance of timepieces to civilization. Symphonies and constellations have been named for clocks. During the fourteenth century, the development of clock towers marked the rise of a business mentality. ¶

The Baldwin Museum is open from 10 A.M. to 5 P.M. Tuesday through Saturday and 1 P.M. to 6 P.M. on Sundays. We are closed on Monday. Please let us know if we can provide any further assistance. ¶

After adding the sentence to the first paragraph, you read the paragraph.

You think the second sentence will read better if you delete the word “really.”

To delete text, first **select** what you want to delete. You can do this by using the mouse or the keyboard.

Once “really” is selected, delete the word by pressing **DELETE** on your keyboard.

Select and delete text

Thank you for your enquiry regarding a group tour of The Baldwin Museum. Yes, our current exhibit really does feature clocks. The exhibit points out the importance of timepieces to civilization. Symphonies and constellations have been named for clocks. During the fourteenth century, the development of clock towers marked the rise of a business mentality. ¶

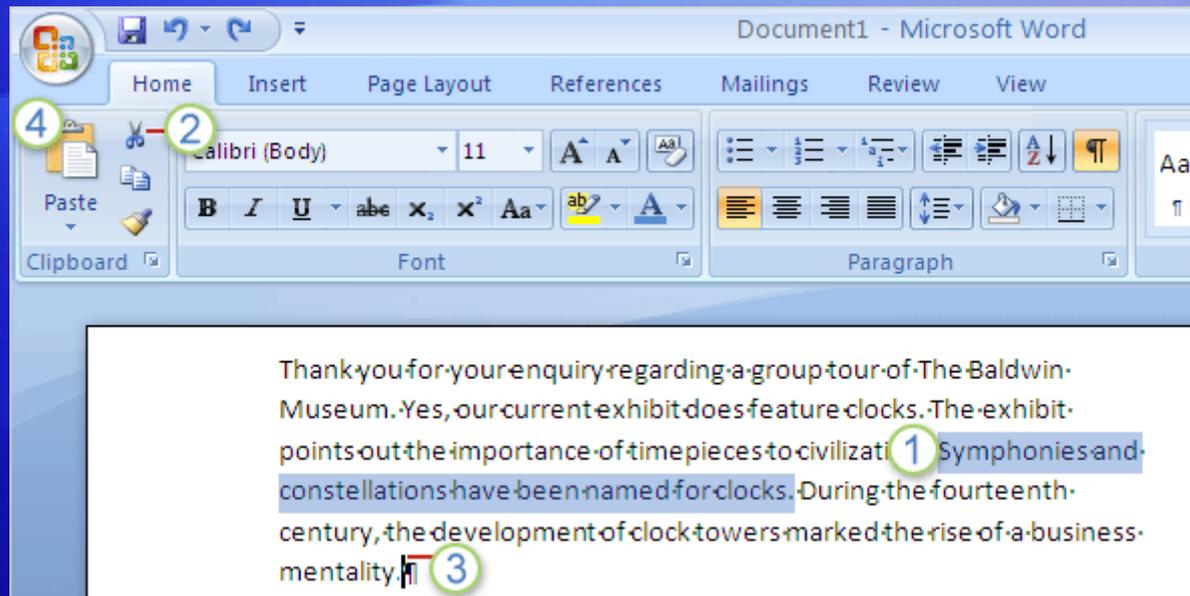
The Baldwin Museum is open from 10 A.M. to 5 P.M. Tuesday through Saturday and 1 P.M. to 6 P.M. on Sundays. We are closed on Monday. Please let us know if we can provide any further assistance. ¶

In the picture, you can see formatting marks: a dot between each word and sentence, and a paragraph mark at the end of each paragraph.

These marks help you when you revise text.

For example, you don't want to delete the space between words or sentences. One dot between each word or sentence lets you know that the spacing is okay.

Move text

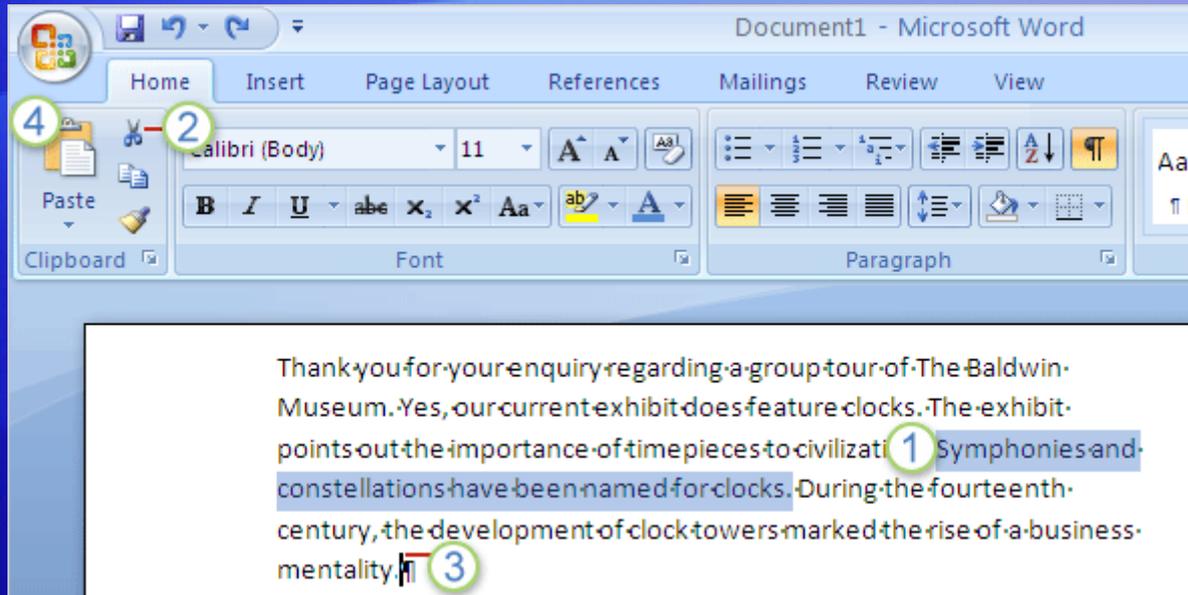


Still looking at the first paragraph, you decide that the sentence you added should be the last sentence in the paragraph.

You don't have to delete the sentence and then type it again.

Instead, you can move the sentence by performing a **cut-and-paste** operation: **Cut** the sentence to delete it from its current location, and then **paste** it into the new location.

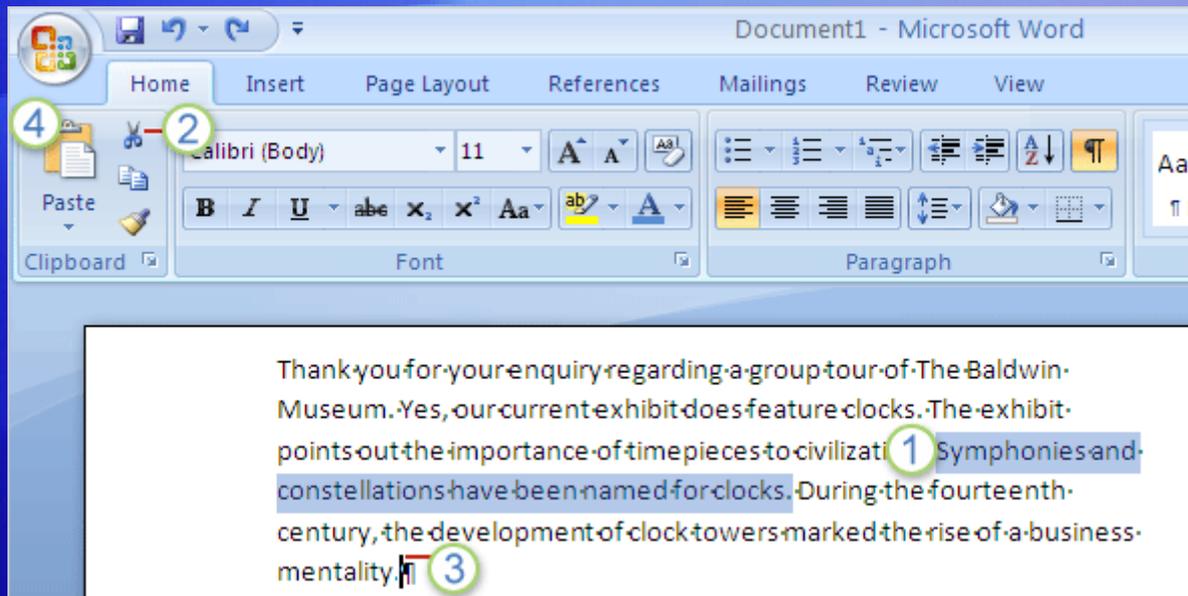
Move text



The picture illustrates what to do.

- 1 First select the entire sentence.
- 2 Then, on the Ribbon at the top of the window, on the **Home** tab, in the **Clipboard** group, click **Cut** .

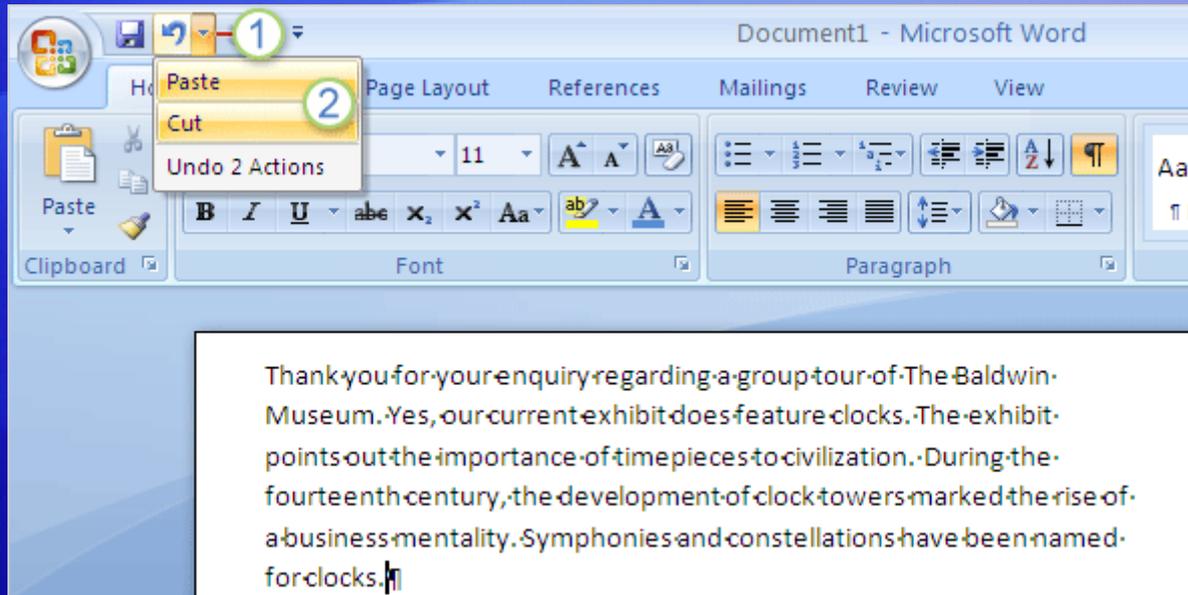
Move text



The picture illustrates what to do.

- 3 Move the pointer to the end of the paragraph, where you want the sentence to appear (after the dot (·) formatting mark).
- 4 On the **Home** tab, in the **Clipboard** group, click **Paste** . The sentence is pasted in place.

Undo changes



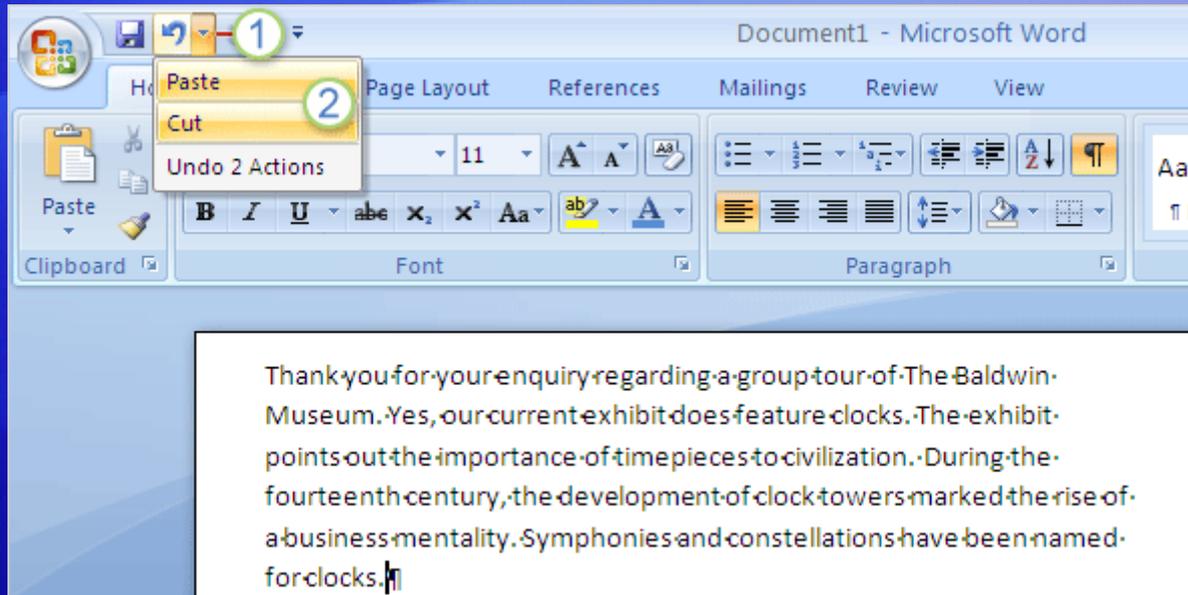
You've moved the sentence, but now you're not happy with the change.

Fortunately, you don't have to go through the cut-and-paste process again to move the sentence back.

Instead, use **Undo**:

- 1 On the Quick Access Toolbar at the very top of the window, click the arrow on the **Undo** button .

Undo changes



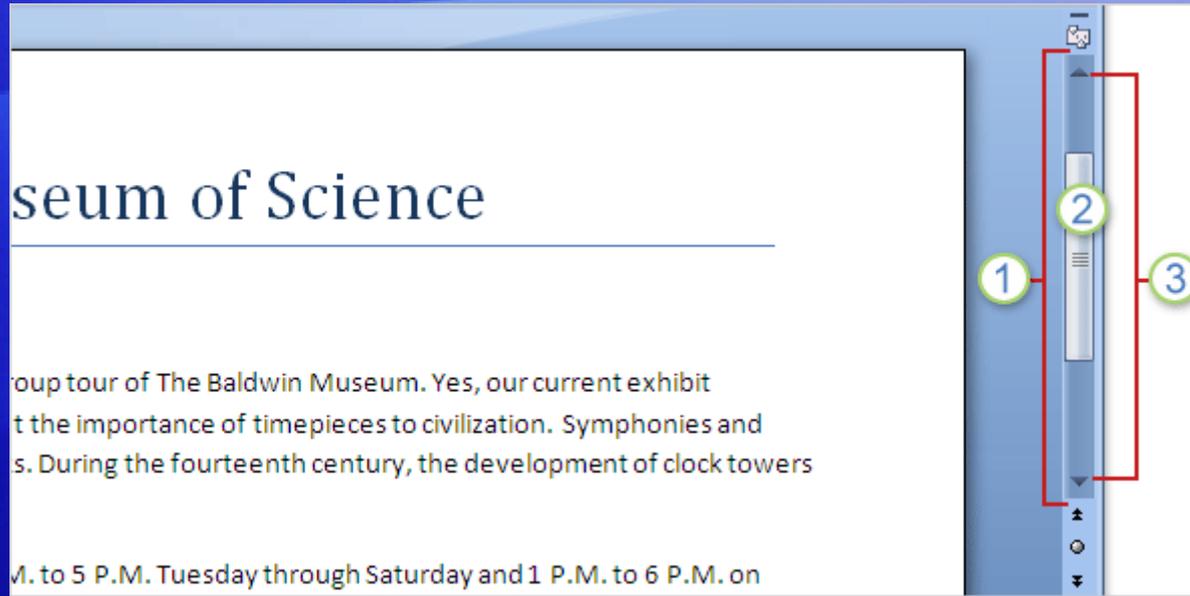
You've moved the sentence, but now you're not happy with the change.

Fortunately, you don't have to go through the cut-and-paste process again to move the sentence back.

Instead, use **Undo**:

- 2 Move the cursor over the last two actions, **Paste** and **Cut**, and then click. This will undo the last two actions you took and place the sentence back in its original location.

Use the scroll bar to review a document

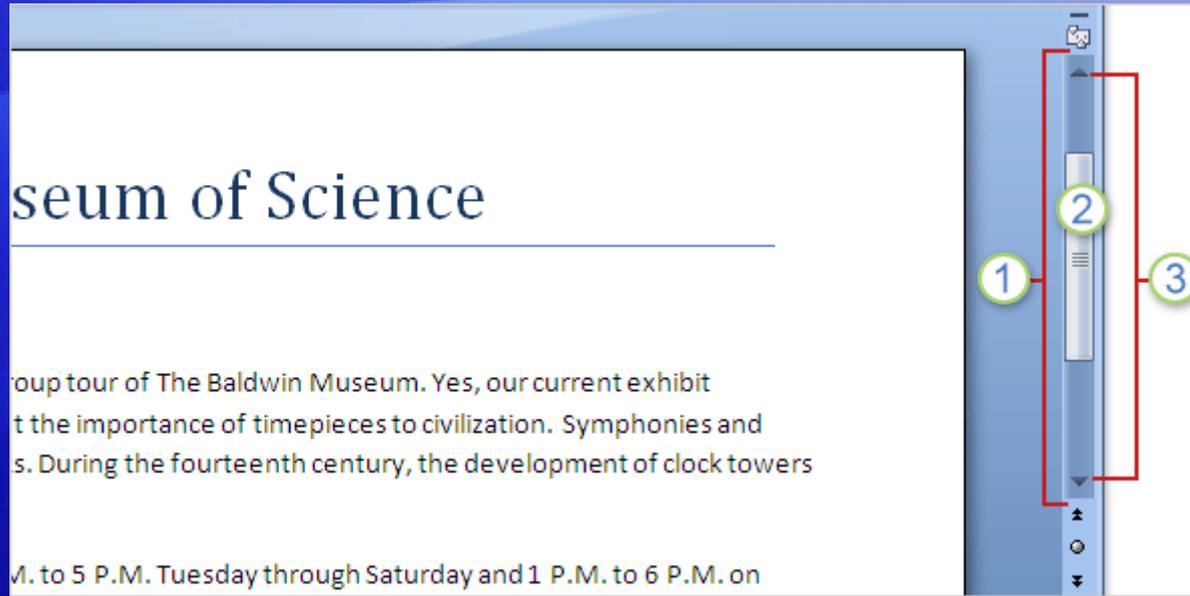


Perhaps you have a long document that you'd like to read all the way through without having to continuously press the arrow keys to move the cursor.

You can do that by **scrolling**, using the scroll bar.

- 1 The scroll bar is on the right side of the window,
- 2 To use it, click the scroll box, and then drag it up or down to move through a document without moving the cursor.

Use the scroll bar to review a document

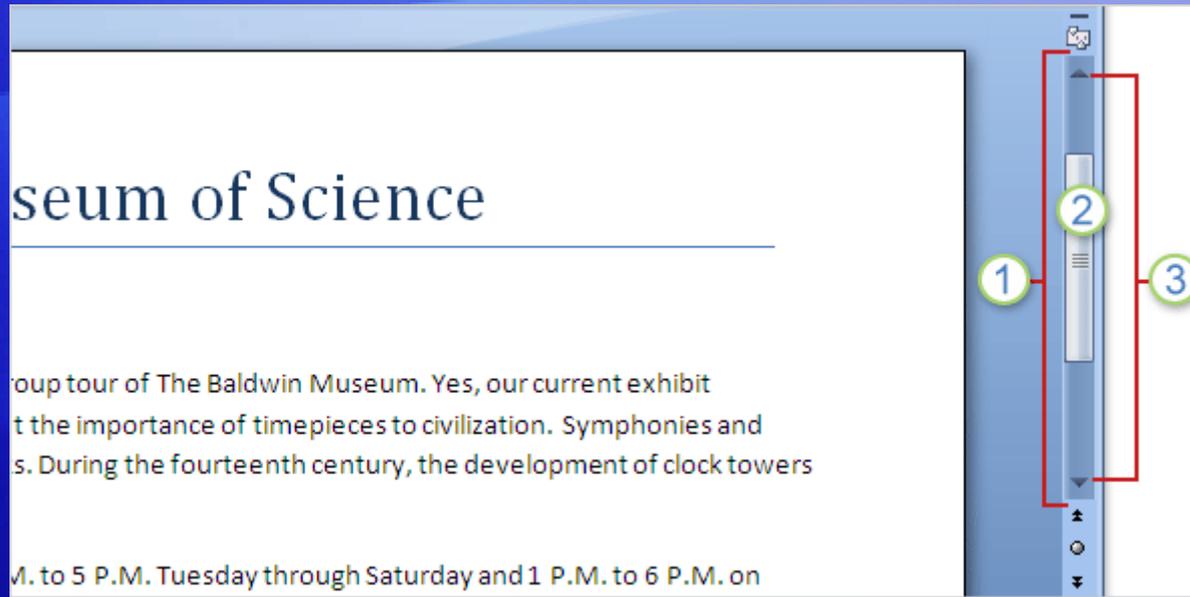


Perhaps you have a long document that you'd like to read all the way through without having to continuously press the arrow keys to move the cursor.

You can do that by **scrolling**, using the scroll bar.

- 3 Or click the single scroll arrows at either end of the scroll bar to move up or down.

Use the scroll bar to review a document



Perhaps you have a long document that you'd like to read all the way through without having to continuously press the arrow keys to move the cursor.

To quickly scroll by using your keyboard, press **PAGE UP**  to go up one screen or **PAGE DOWN**  to go down one screen.

Suggestions for practice

1. Show formatting marks.
2. Move around in the document.
3. Select text.
4. Move text.

[Online practice](#) (requires Word 2007)

Test question 1

After you've deleted text, you can still get it back. (Pick one answer.)

1. True.
2. False.

Test question 1: Answer

True.

You can get it back by clicking Undo on the Quick Access Toolbar or by pressing CTRL+Z, as long as you have not yet closed the document or performed any other action that you want to keep.

Test question 2

What's the first thing you do to delete text? (Pick one answer.)

1. Press DELETE.
2. Press BACKSPACE.
3. Select the text you want to delete.

Test question 2: Answer

Select the text you want to delete.

Select text by using the mouse pointer or the keyboard, and then press DELETE or BACKSPACE.

Test question 3

To move text from one location to another, copy the text.
(Pick one answer.)

1. True.
2. False.

Test question 3: Answer

False.

To move the text from one place, select and then cut the text. Paste it in the new location.

Quick Reference Card

For a summary of the tasks covered in this course, view the [Quick Reference Card](#).

JohnRouda.com presents:

Microsoft® Office Word 2007 Training

Save time with templates

Course contents

- Overview: Get a jump-start on your documents
- Lesson 1: Tap into template power
- Lesson 2: Create your own templates

Each lesson includes a list of suggested tasks and a set of test questions.

Overview: Get a jump-start on your documents



Before creating your Word 2007 document from scratch, think about starting with one of the content-rich templates that already exist.

Word provides a wealth of templates, from letters and resumés to calendars and brochures.

You can even go a step further and turn an existing document into a template that exactly suits your needs. This course shows you how.

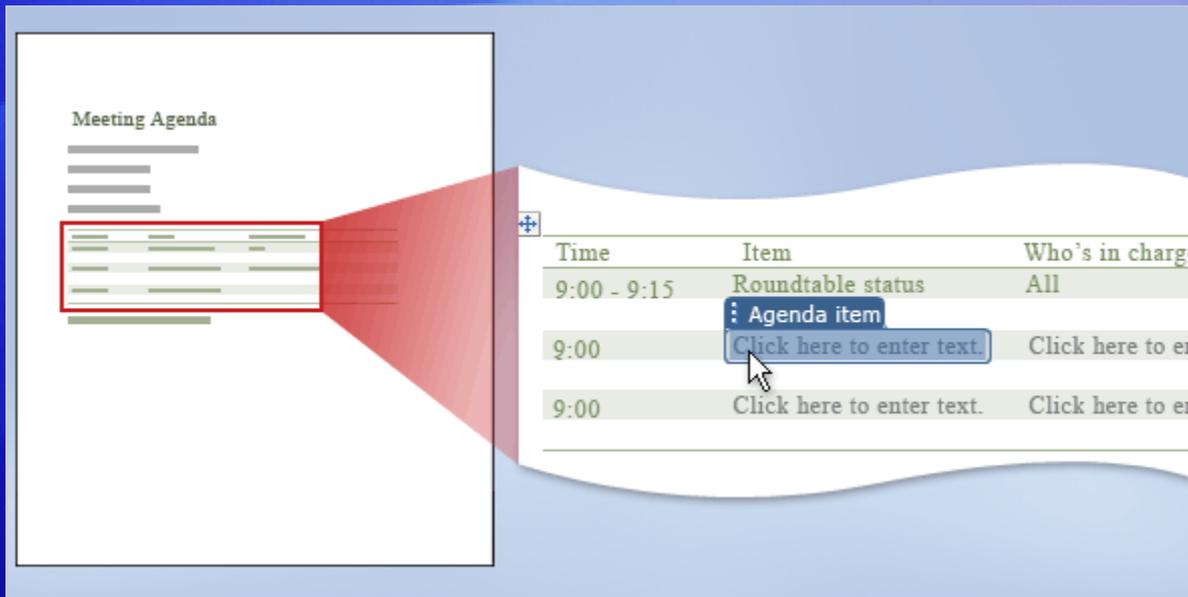
Course goals

- Get a huge time boost by using templates provided by Word and Microsoft Office Online.
- Create your own template, customized to your business needs.

Lesson 1

Tap into template power

Tap into template power



While you may have worked in Word, you might not be so familiar with Word templates.

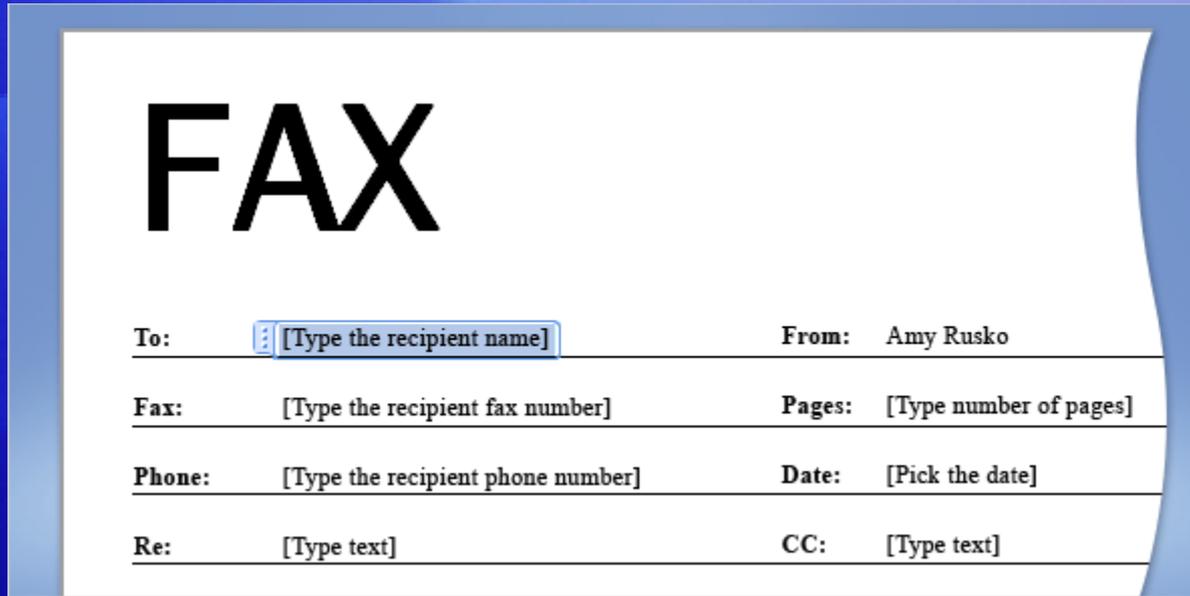
What's a template, and what's its benefit to you?

A template is a type of document that already contains content. Using a template can help ensure impressive document design and save you time.

This lesson offers some examples by providing a firsthand glimpse of the many templates that already exist within Word itself and on Microsoft Office Online.

Save time with templates

Use an already-made fax cover sheet



FAX

To:	[Type the recipient name]	From:	Amy Rusko
Fax:	[Type the recipient fax number]	Pages:	[Type number of pages]
Phone:	[Type the recipient phone number]	Date:	[Pick the date]
Re:	[Type text]	CC:	[Type text]

Let's say that on your job you frequently have the task of sending a fax to another company.

You always need a cover page for the fax.

You could spend the time and create this page in Word every time. Or you could use a fax cover sheet that Word already contains.

You will find this, and other templates, among Word's **installed templates**.

Use an already-prepared agenda



Here's another example of how Word templates could help you.

Imagine that you're in charge of creating the agenda for your weekly team meeting.

Before you start from a blank page, look at the templates available on Microsoft Office Online—you can link directly to these from within Word.

On Office Online, you'll find a vast and varied collection of templates organized into categories. Within each, you have several choices of template type.

Save time with templates

Use an already-prepared agenda



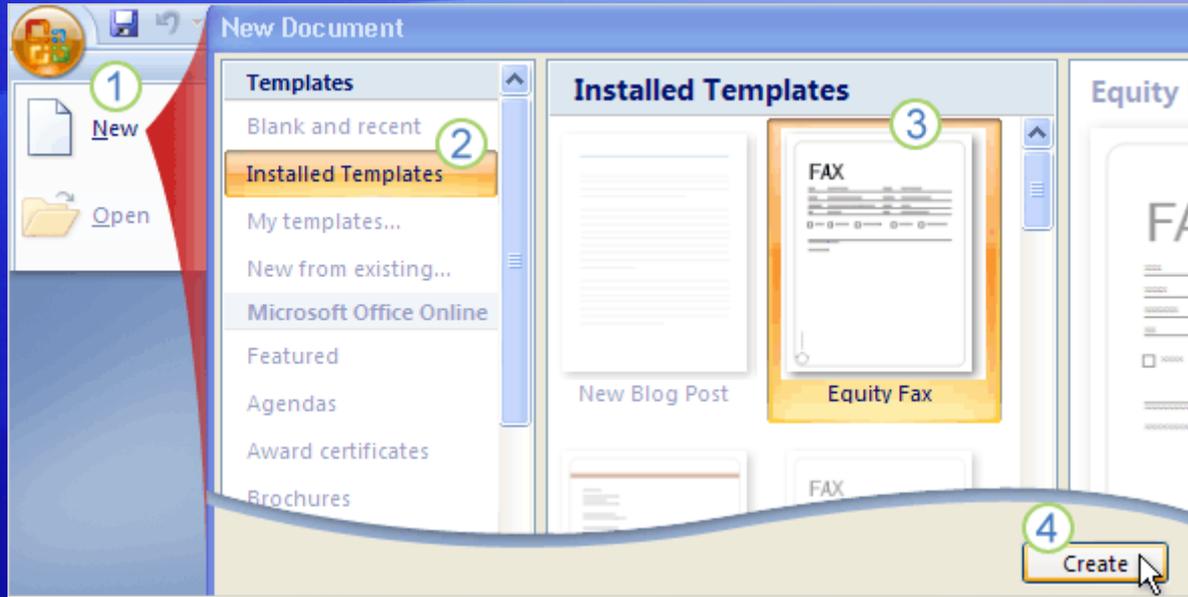
The picture shows three of the agenda templates.

Simply open the agenda you want, and fill in your information.

- 1 Simple and straightforward, with formatted text areas that help you fill out the agenda.
- 2 A completely finished, artful look; you can type over example text.
- 3 Page layout and formatting amped up a notch, with color and tables creating areas for a complex agenda design.

Save time with templates

Find installed templates

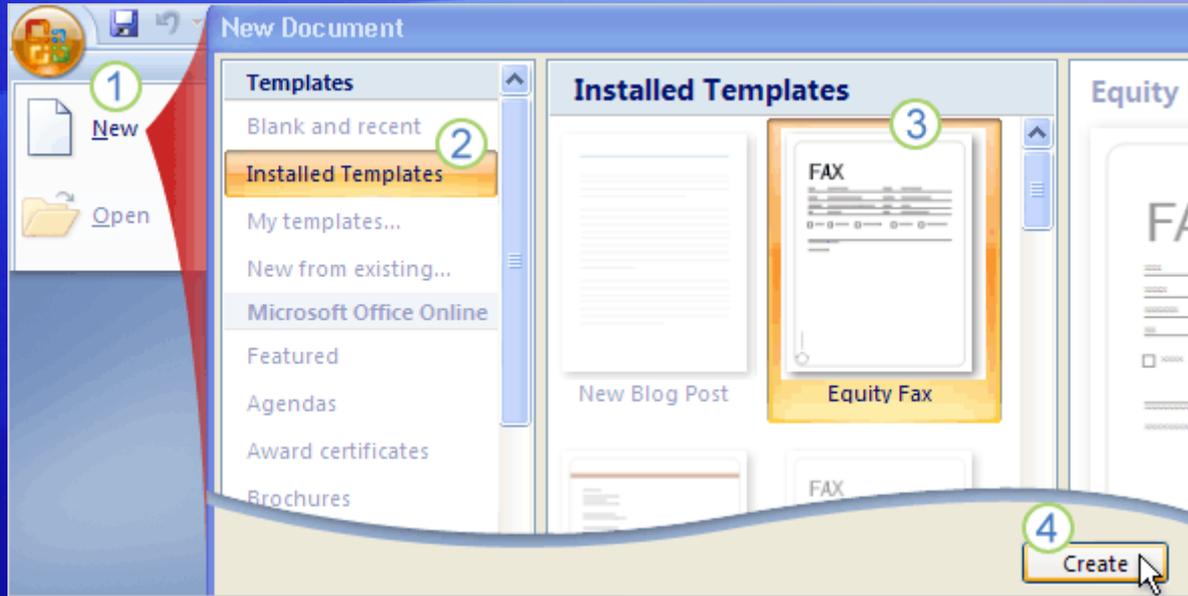


Word includes over 30 pre-installed templates for document types such as letters, faxes, reports, resumés, and blog posts.

Here's how you find them.

- 1 Click the **Microsoft Office Button**, and click **New**.
- 2 In the **New Document** window, click **Installed Templates**.

Find installed templates



Word includes over 30 pre-installed templates for document types such as letters, faxes, reports, resumés, and blog posts.

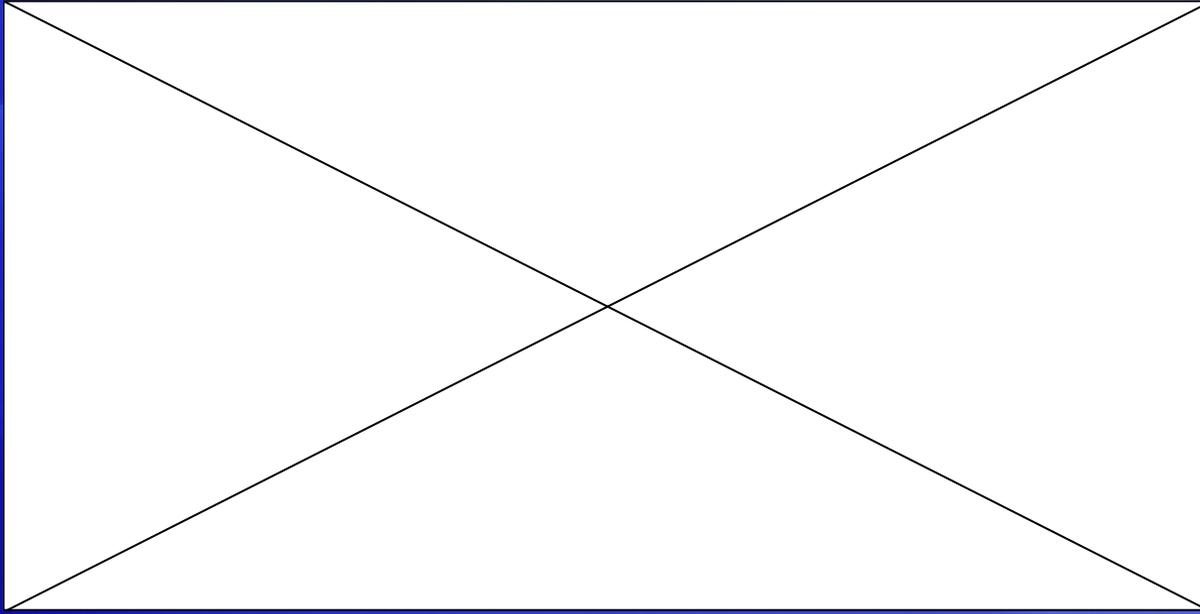
Here's how you find them.

- 3 Click one of the thumbnails, and see its preview on the right.
- 4 When you've found the template you want, click **Create**.

A new document opens that's based on the template, and you make the changes to it that you want.

Save time with templates

Find Office Online templates



The steps for opening templates from the Office Online Web site are very similar.

Animation: Right-click, and click **Play**.

As the animation shows, you open the **New Document** window, but in this case you look in the area under **Microsoft Office Online**.

Click a category to see thumbnails. To download a template, select the thumbnail and click **Download**.

Save time with templates

Find Office Online templates



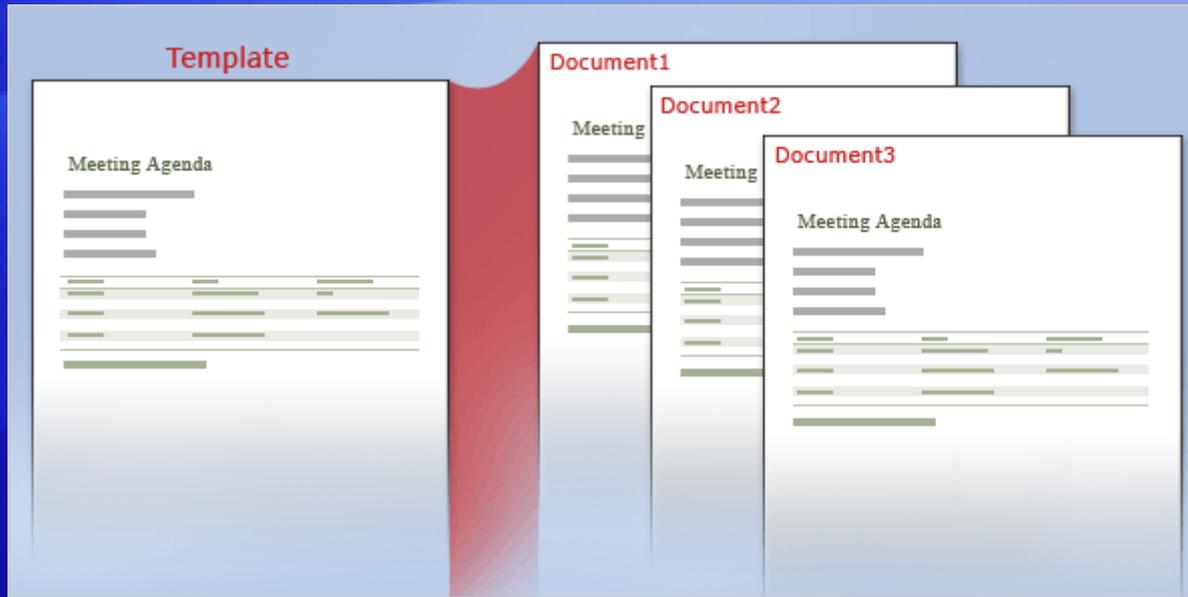
The steps for opening templates from the Office Online Web site are very similar.

You open the **New Document** window, but in this case you look in the area under **Microsoft Office Online**.

Click a category to see thumbnails. To download a template, select the thumbnail and click **Download**. A template opens as a fresh new document on your computer for you to add to as you want and then save.

Save time with templates

A template's special power



When you open a template, a new document opens that's based on the template you selected.

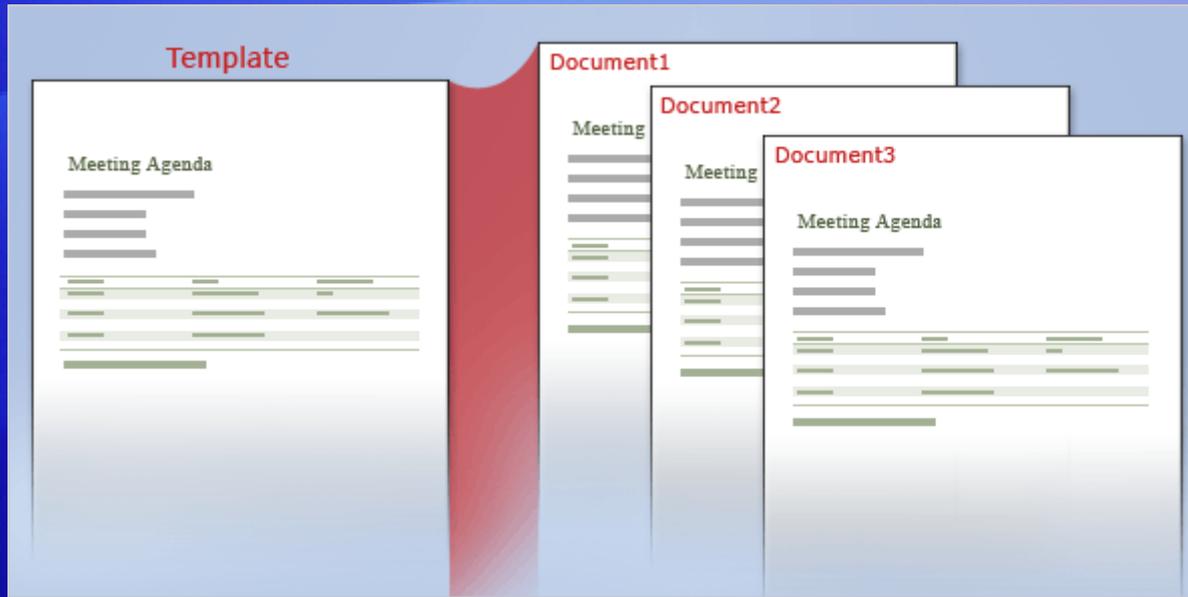
So you're opening a copy of the template, not the template itself.

And that's a template's special power: *It opens up a copy of itself*, imparting everything it contains to a new, fresh document.

You work in that new document, benefiting from everything that was built into the template, plus adding or deleting what you need to.

Save time with templates

A template's special power

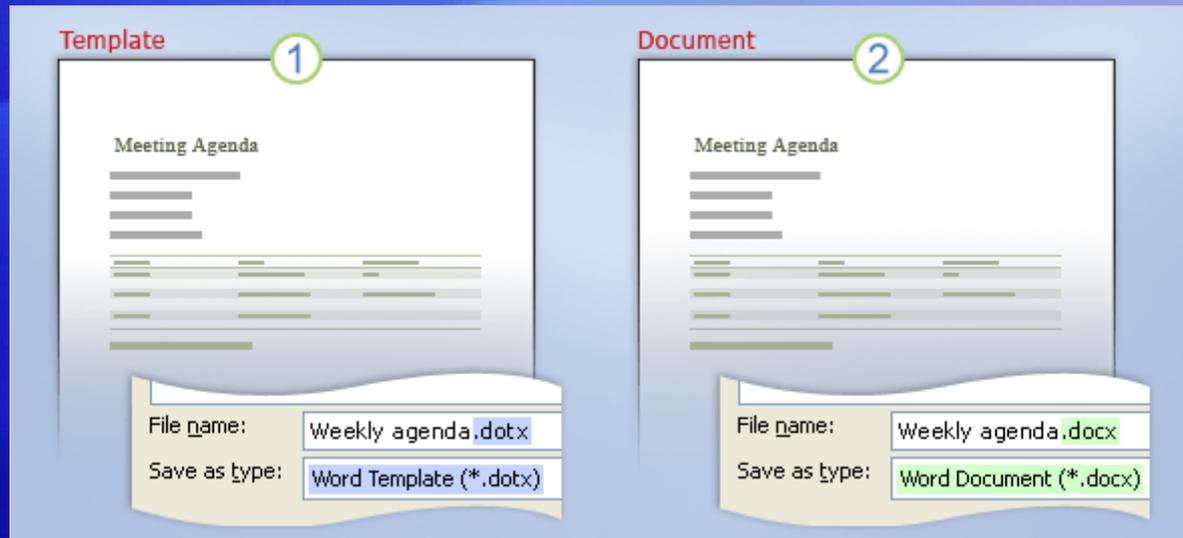


Because the new document is not the template itself, your changes are saved to the document, and the template is left in its original state.

Therefore, one template can be the basis for an unlimited number of documents.

Every document is based on a template of some kind; the template just lives in the background.

Templates, documents: two distinct file types



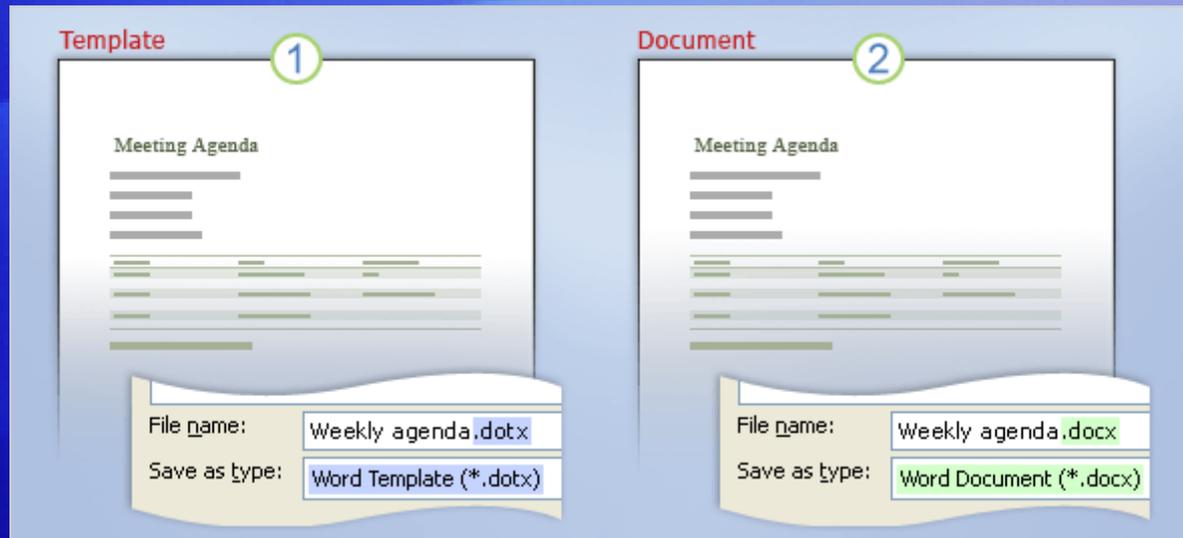
Just as templates have slightly different behavior from documents, so are they also a distinct file type.

If you've saved many documents in Word, you're probably familiar with the choices of file type available in which to save files.

The standard format defaults to a document type.

Save time with templates

Templates, documents: two distinct file types



A template is a different type, and templates and documents behave differently.

- ① As shown in example 1: A template is saved as a **Word Template** type. It has .dotx at the end of its file name. (In prior Word versions, this extension was .dot.)
- ② As shown in example 2: A document is saved as a **Word Document** type. It has .docx at the end of its file name. (In prior Word versions, this extension was .doc.)

Suggestions for practice

1. Use a template for a business letter.
2. Add your own text to the letter.
3. Use a template for a flyer.

[Online practice](#) (requires Word 2007)

Test 1, question 1

What's a significant way in which a template differs from a document? (Pick one answer.)

1. It contains styles.
2. It contains a Word theme.
3. It opens up a copy of itself as a new document.

Test 1, question 1: Answer

It opens up a copy of itself as a new document.

The template is meant to be a starting point for a document that you can go on to customize as you need to. A template has a universal quality that's widely adaptable, so you can use it repeatedly for a certain type of document.

Test 1, question 2

Within Word, what's the first step to finding existing Word templates? (Pick one answer.)

1. Click the **Microsoft Office Button**, and then click **New**.
2. Click the **Microsoft Office Button**, and the click **Word Options**.

Test 1, question 2: Answer

Click the **Microsoft Office Button**, and then click **New**.

Links for installed templates and online templates are contained in the **New Document** window that opens when you click **New**.

Test 1, question 3

A template is different from a document in the way that it behaves and also as a file type. (Pick one answer.)

1. True.
2. False.

Test 1, question 3: Answer

True.

A template differs from a document in that it opens up a copy of itself in the form of a fresh, new document. Also, it is saved as a file type called Word Template, which has the .dotx extension at the end of the file name.

Lesson 2

Create your own templates

Create your own templates

Margie's Travel
Business District
Redmond, WA 10021
<http://www.margiestravel.com>
Phone [(509) 555-0190]
Fax [(509) 555-0191]

INVOICE

INVOICE #[100]
[CLICK HERE TO ENTER A DATE.](#)

TO:
[Name]
[Company Name]
[Street Address]
[City, ST ZIP Code]
[Phone]

FOR:
[Project or service description]
[P.O. #]

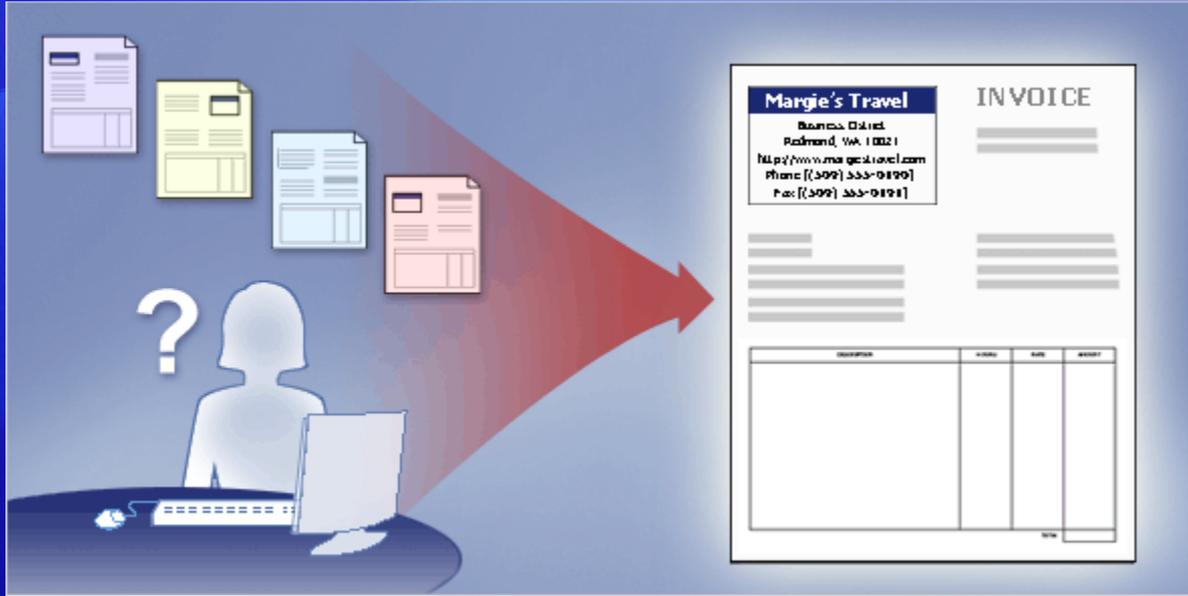
Say you often use a certain invoice whose basic content stays the same except for certain details that change each time.

In effect, you're using your original document as a template, although you may never have turned it into one.

Why not do so? You'll have one clear master to work from, and you won't have to undo outdated content when you're preparing a current invoice.

Save time with templates

Advantages of creating a template

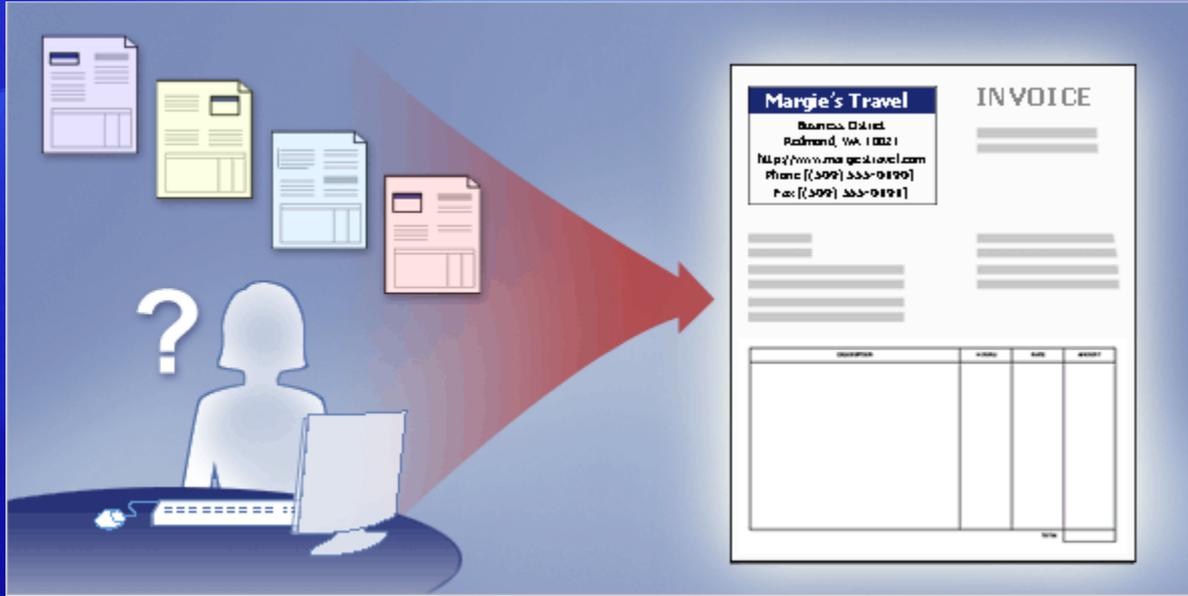


Sticking with the example of an invoice document, here are some things you'd gain by turning the document into a template.

- You wouldn't have to search through various document versions; changes would all be stored in the template.
- Since a template opens up a copy of itself, you wouldn't have to worry about accidentally saving over one of your previous invoices.

Save time with templates

Advantages of creating a template

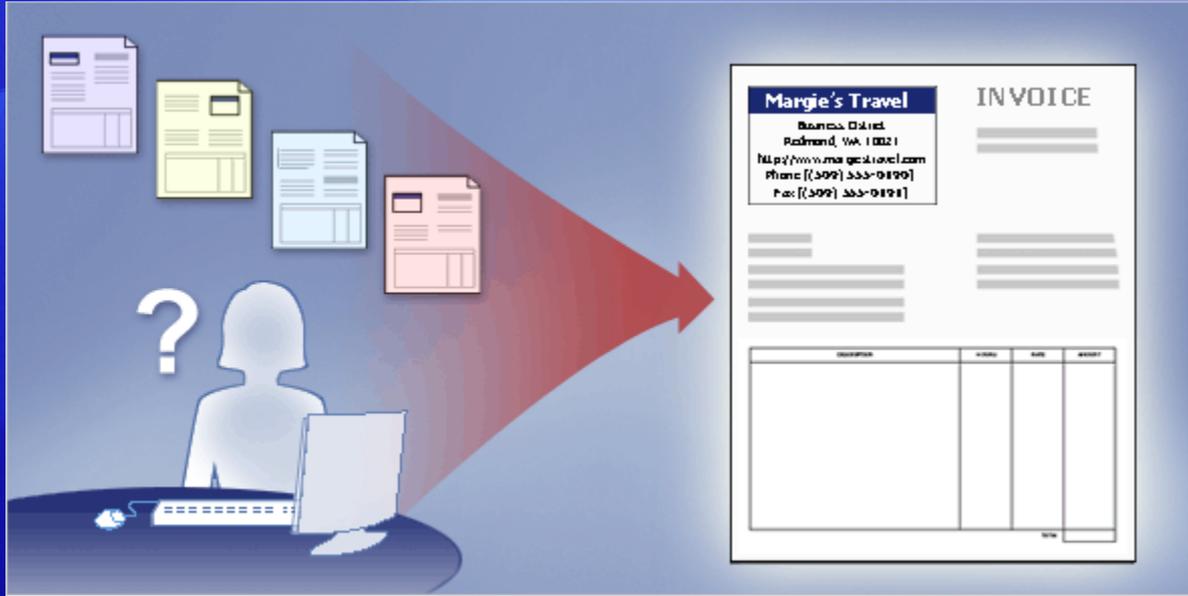


Sticking with the example of an invoice document, here are some things you'd gain by turning the document into a template.

- You could alter the template's content so that it contained only that information you wanted for every single invoice. This way, you would not always have to delete outdated information, and that would save you time and bother.

Save time with templates

Advantages of creating a template



Sticking with the example of an invoice document, here are some things you'd gain by turning the document into a template.

- By taking out the obsolete content, you'd reduce the chance of saving and accidentally sending out an invoice with unwanted information.
- The template would always be in the same location in Word, with all your other templates.

Save time with templates

Prepare the content for the template

Margie's Travel
Business District
Redmond, WA 10021
<http://www.margiestravel.com>
Phone [(509) 555-0190]
Fax [(509) 555-0191]

INVOICE

INVOICE #[100]
DATE: AUGUST 26, 2009

TO:
[Name]
[Company Name]
[Street Address]
[City, ST ZIP Code]
[Phone]

FOR:
[Project or service description]
[P.O. #]

DESCRIPTION	HOURS	RATE	AMOUNT

The form includes four numbered callouts: 1 points to the company header, 2 points to the invoice number and date, 3 points to the TO and FOR fields, and 4 points to the table header.

Part of the process of creating a template is leaving or creating just the information in it that you want.

This is the content that you'd want each new document that was based on the template to start with.

Much of what you put in the template depends on your own preferences and the particulars of the content.

Prepare the content for the template

Margie's Travel
Business District
Redmond, WA 10021
<http://www.margiestravel.com>
Phone [(509) 555-0190]
Fax [(509) 555-0191]

INVOICE

INVOICE #[100]
DATE: AUGUST 26, 2009

TO:
[Name]
[Company Name]
[Street Address]
[City, ST ZIP Code]
[Phone]

FOR:
[Project or service description]
[P.O. #]

DESCRIPTION	HOURS	RATE	AMOUNT

First, open the document you want to use to create the template (in this case, the invoice document), or open a blank document.

Here are typical things you might do afterward:

- 1 Leave in the content that's bound to stay the same for a while.
- 2 Insert a **Date & Time** command for the invoice's date area. This will automatically put the current date into a new document.

Save time with templates

Prepare the content for the template

Margie's Travel
Business District
Redmond, WA 10021
<http://www.margiestravel.com>
Phone [(509) 555-0190]
Fax [(509) 555-0191]

INVOICE

INVOICE #[100]
DATE: AUGUST 26, 2009

TO:
[Name]
[Company Name]
[Street Address]
[City, ST ZIP Code]
[Phone]

FOR:
[Project or service description]
[P.O. #]

DESCRIPTION	HOURS	RATE	AMOUNT

The image shows an invoice template with four numbered callouts: 1 points to the company header box, 2 points to the invoice number and date, 3 points to the 'TO' and 'FOR' fields, and 4 points to the table header.

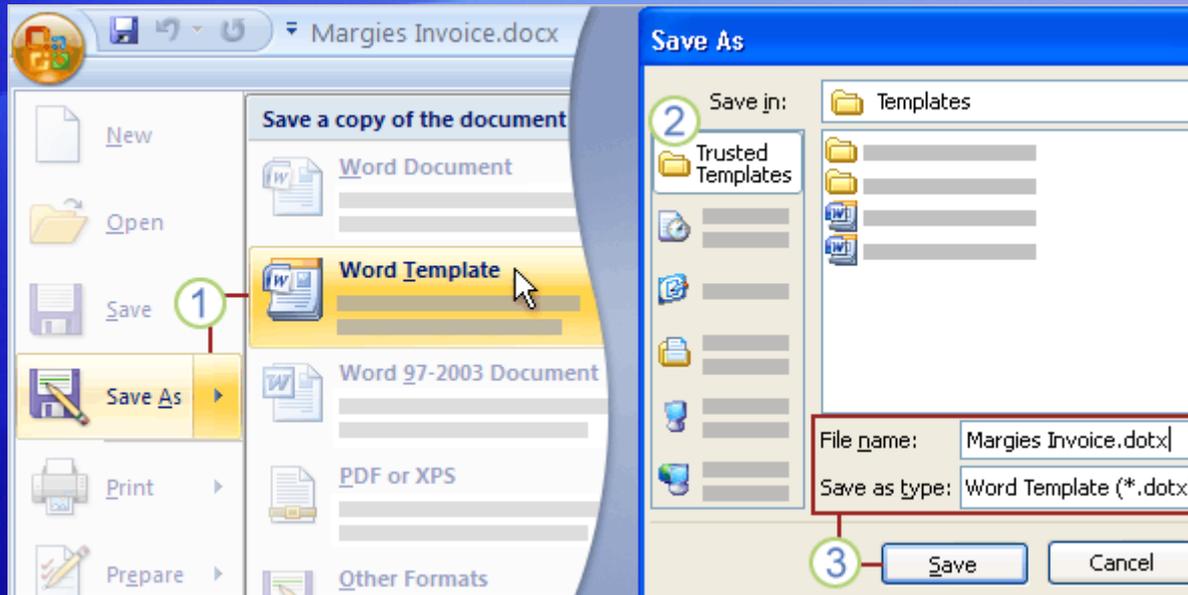
First, open the document you want to use to create the template (in this case, the invoice document), or open a blank document.

Here are typical things you might do afterward:

- 3 Leave text placeholder areas for information that will change per invoice: company name and address the invoice goes to.
- 4 Leave empty the areas that will change for every invoice: work done, number of hours, and total cost.

Save time with templates

Save the file as a template

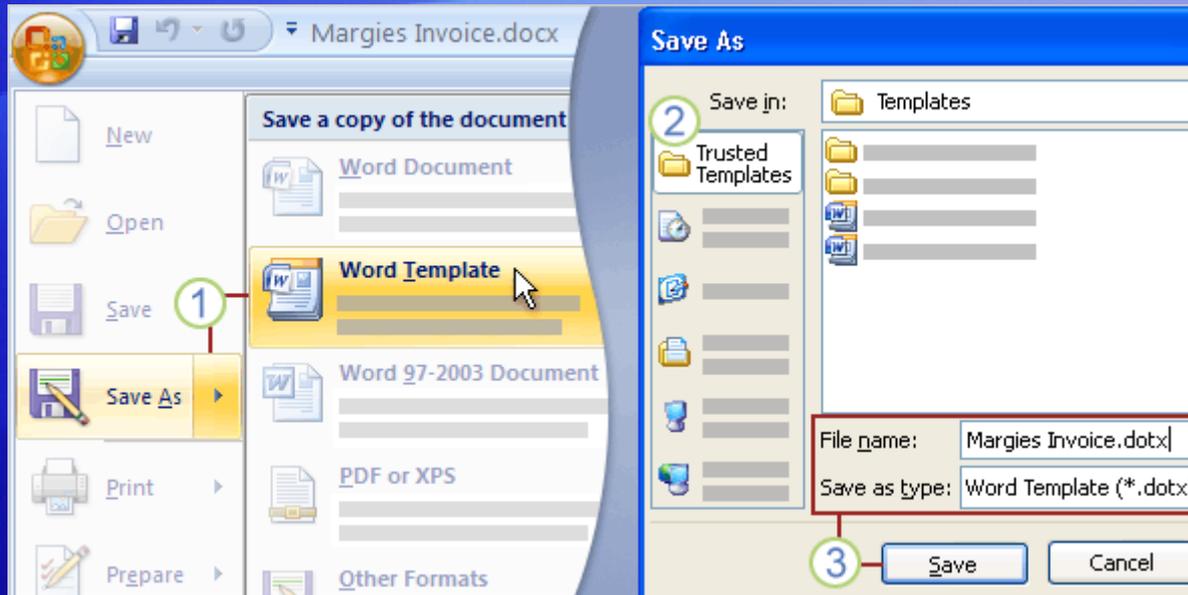


Since a template is its own type of file, to save a document as a template you'll select the file type called **Word Template**.

Here are the steps.

- 1 Click the **Microsoft Office Button**, point to **Save As**, and click **Word Template**.
- 2 In the **Save As** dialog box, click **Trusted Templates** as the place in which to save the template.
- 3 Name the template, and click **Save**.

Save the file as a template



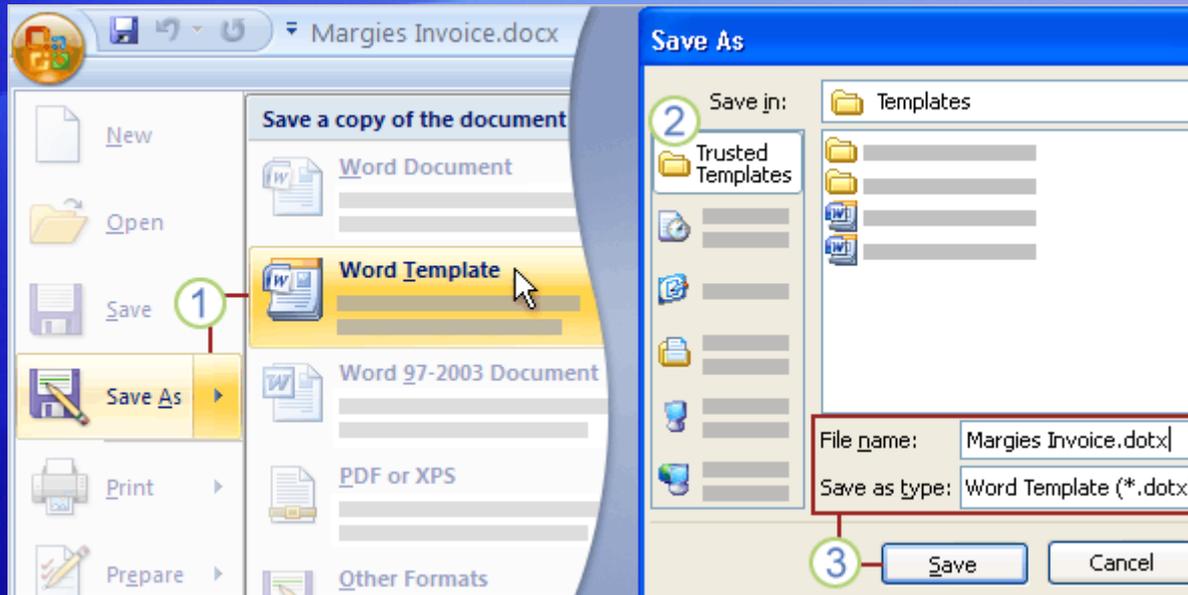
Putting the template in Trusted Templates is important.

This tells Word that it's safe to open even if the template should contain macros or other code.

Because macros can contain malicious code, Word is on the lookout against opening documents with macros.

If your computer security settings are at the recommended level, Word will open any template file, but it will disable any macros it contains.

Save the file as a template

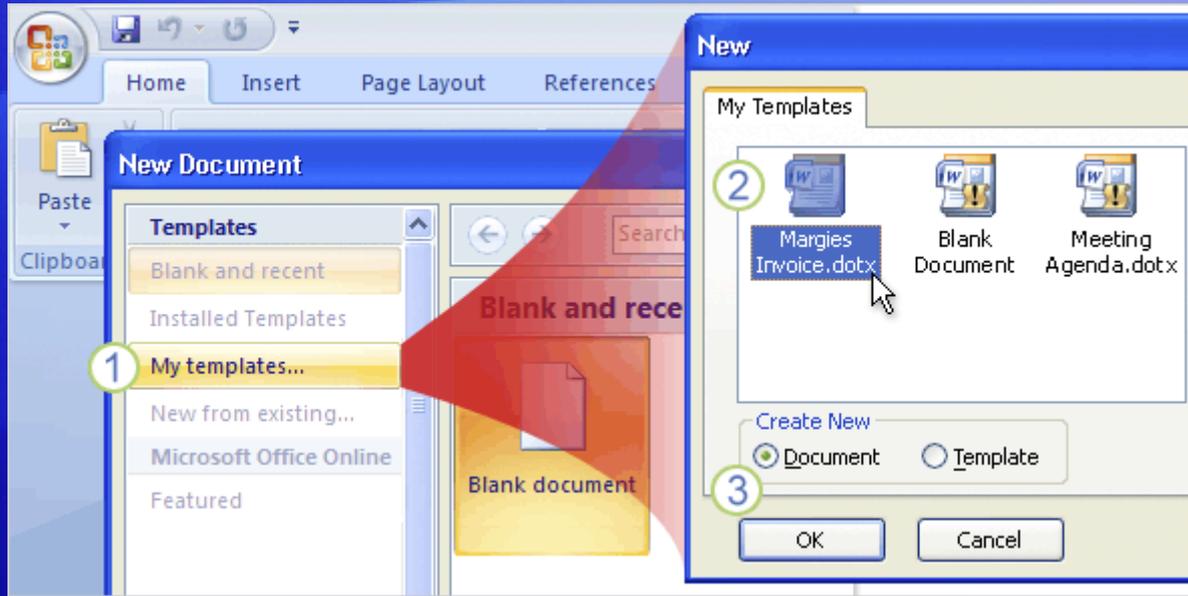


Putting the template in Trusted Templates is important.

This tells Word that it's safe to open even if the template should contain macros or other code.

For templates that are in the Trusted Templates folder, however, Word doesn't disable the macros. It assumes the files are safe, so be sure the files you store there are from a trusted source.

Create a document based on the template

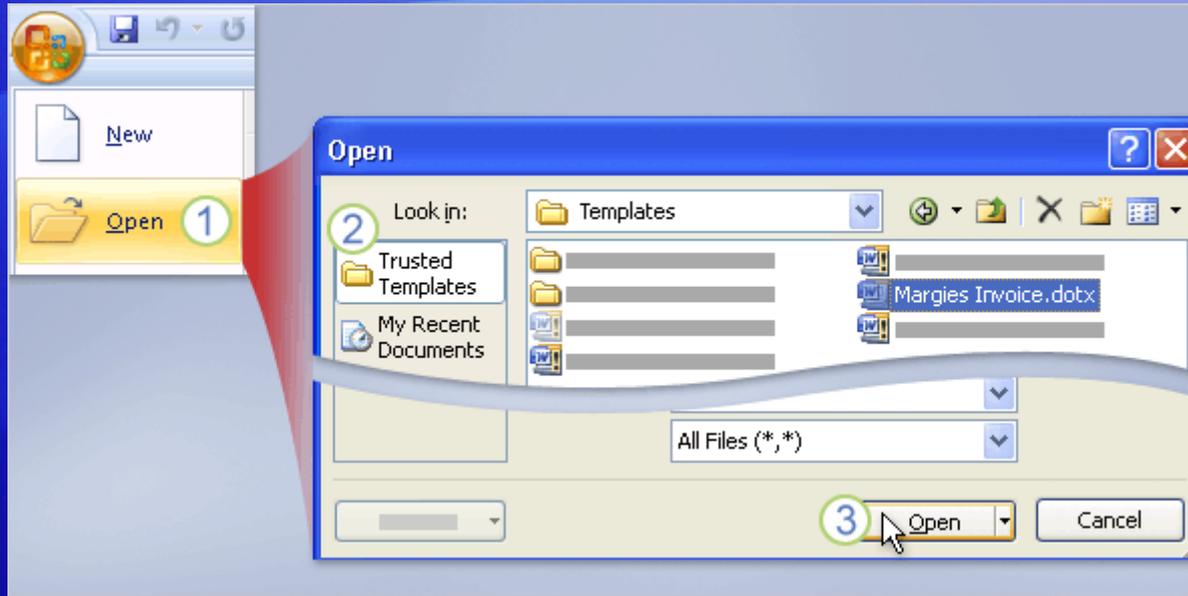


Another advantage of saving a template in the **Trusted Templates** folder is that Word then makes it very easy to find.

- 1 In the **New Document** window, click **My templates**.
- 2 Click the template you want.
- 3 Make sure that **Document** is selected on the lower right, under **Create New**, and then click **OK**.

Save time with templates

Edit the template

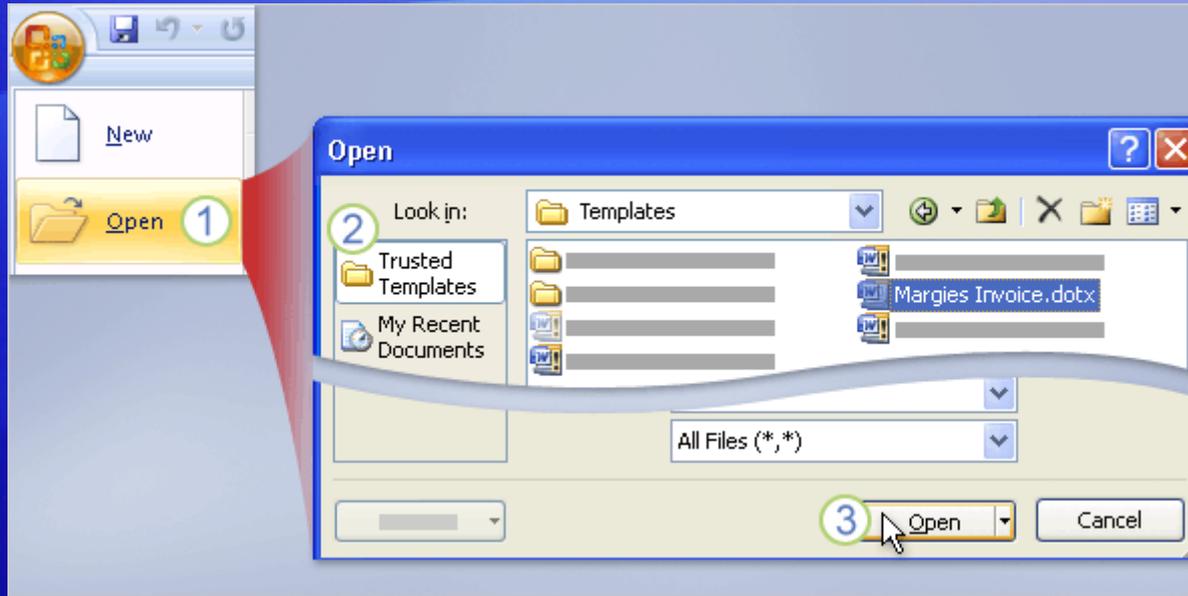


What if a vital part of the template information became outdated; for example, your company logo changes?

Here's how you'd open it up and edit it.

- 1 Click the **Microsoft Office Button** , and click **Open**.
- 2 Click the **Trusted Templates** folder.
- 3 Select the template, and click **Open**.

Edit the template



What if a vital part of the template information became outdated, for example, your company logo changes?

Here's how you'd open it up and edit it.

Protecting your templates

If you have created a template that other people in your company plan to use, consider protecting the template's contents against edits to the template that you may not want.

Suggestions for practice

1. View extensions in a file name.
2. Turn a document into a template.
3. Find and use the template.
4. Edit the template.

[Online practice](#) (requires Word 2007)

Test 2, question 1

One difference between a document file and a template file shows up in the file name, in the file name extension (the letters after the period). What is the file name extension for a template file? (Pick one answer.)

1. .docx
2. .dotx

Test 2, question 1: Answer

.dotx.

This is the extension for a Word template created in Word 2007.

Test 2, question 2

When you want to save a file as a template, you point to **Save As** on the menu under the Microsoft Office Button, and then what do you click? (Pick one answer.)

1. The **Word Template** command.
2. The **Word Document** command.

Test 2, question 2: Answer

The **Word Template** command.

Test 2, question 3

What's one reason you should save a template in the Trusted Templates folder? (Pick one answer.)

1. So that you can find it using the **My Templates** link in the **New Document** window.
2. This protects the template from being edited by someone else.

Test 2, question 3: Answer

So that you can find it using the **My Templates** link in the **New Document** window.

This is a great reason. Just as important, this tells Microsoft Word it does not have to disable macros, if the template contains them, when it opens the template. For this reason, be sure you can fully trust any template that you put in this folder.

Quick Reference Card

For a summary of the tasks covered in this course, view the [Quick Reference Card](#).

JohnRouda.com presents:

Microsoft® Office Word 2007 Training

**Table of Contents I: Create an
automatic TOC**

Course contents

- Overview: A quick and simple TOC
- Lesson: Get started on a table of contents

The lesson includes a list of suggested tasks and a set of test questions.

Overview: A quick and simple TOC



Need a quick and simple way to create a table of contents?

Or, have you previously gotten errors when you tried to create one?

This course shows you a guaranteed way to include a TOC in your document — quickly and automatically.

Course goals

- Prepare your document to use an automatic TOC.
- Create an automatic TOC.
- Update your TOC.

Lesson

Get started on a table of contents

Get started on a table of contents

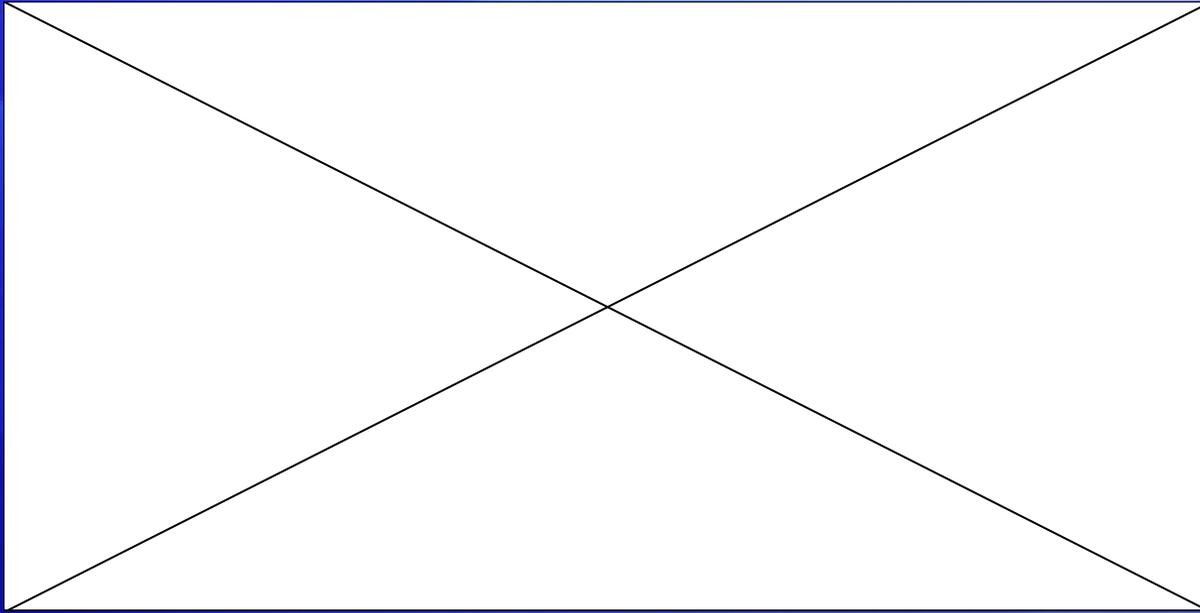
Contents	1
THE PLANETS.....	2
MERCURY.....	2
VENUS.....	2
EARTH.....	3
<i>The Moon.....</i>	<i>3</i>
MARS.....	4
<i>Phobos.....</i>	<i>4</i>
<i>Deimos.....</i>	<i>4</i>
JUPITER.....	4
<i>Io.....</i>	<i>5</i>
<i>Europa.....</i>	<i>5</i>
<i>Ganymede.....</i>	<i>5</i>
<i>Callisto.....</i>	<i>5</i>
SATURN.....	5
<i>Mimas.....</i>	<i>6</i>
<i>Titan.....</i>	<i>6</i>
THE SUN.....	6

A TOC may be a simple list of chapter titles, or it can include several levels, as shown in the picture.

Either way, the TOC provides an overview of what's in the document and helps readers quickly find a particular section.

By automatically collecting your chapter titles and headings and setting them up in hierarchical levels, Word makes TOC creation a snap.

How it works



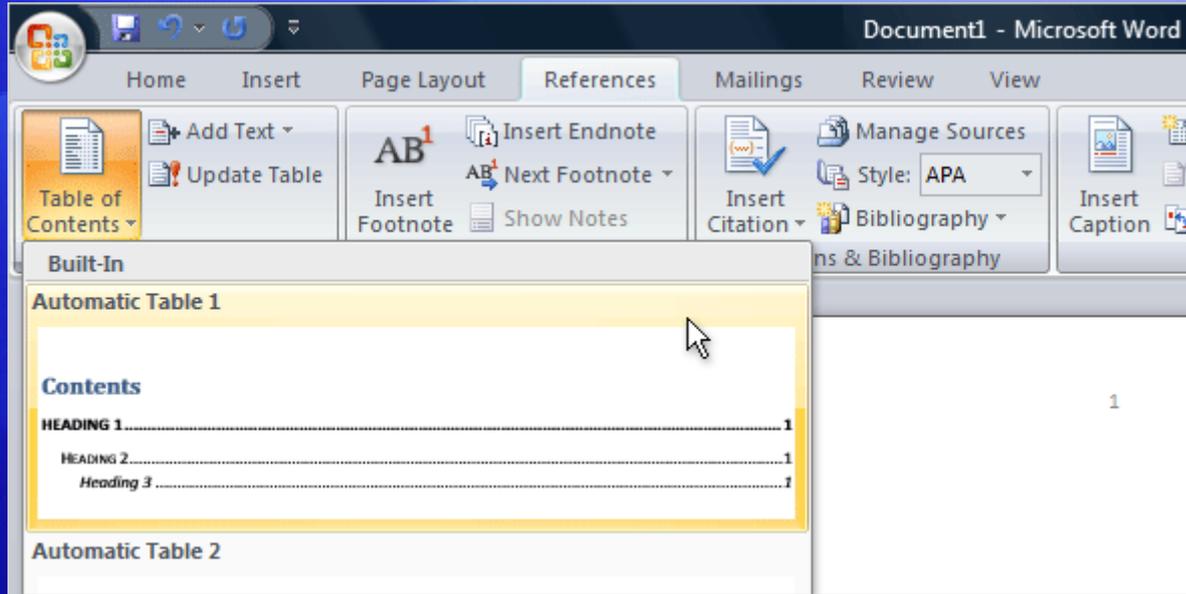
There are two steps you take to create an automatic TOC.

Animation: Right-click, and click **Play**.

1. Prepare your document by assigning heading styles to the chapter titles and headings that you want to appear in the TOC.
2. Collect those titles and headings into the TOC.

How it works

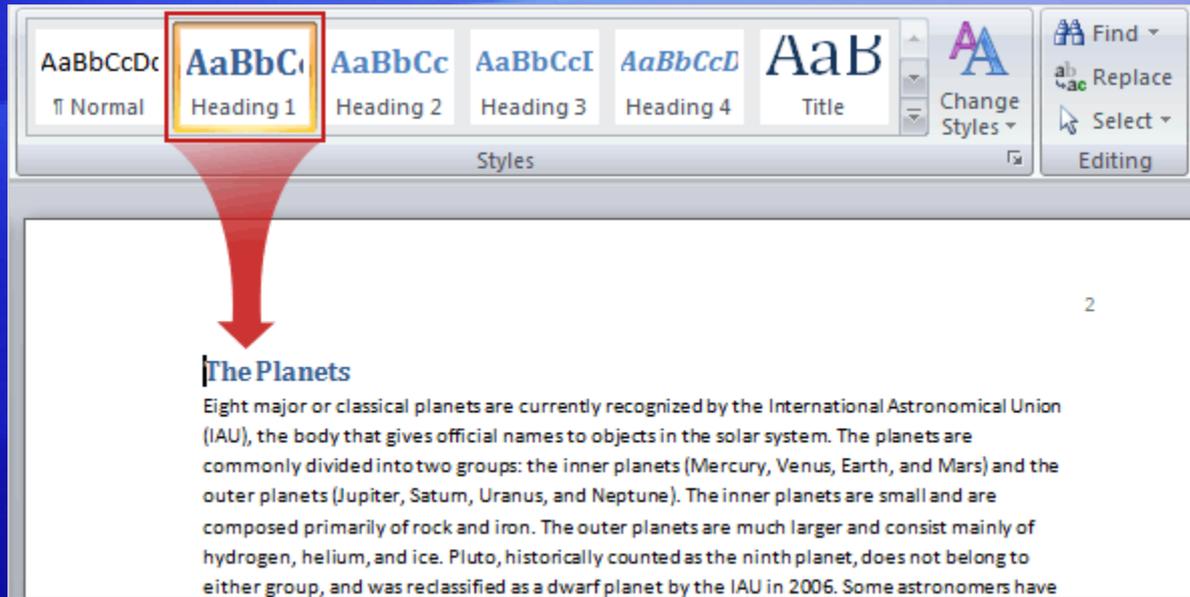
There are two steps you take to create an automatic TOC.



1. Prepare your document by assigning heading styles to the chapter titles and headings that you want to appear in the TOC.
2. Collect those titles and headings into the TOC.

Table of Contents I: Create an automatic TOC

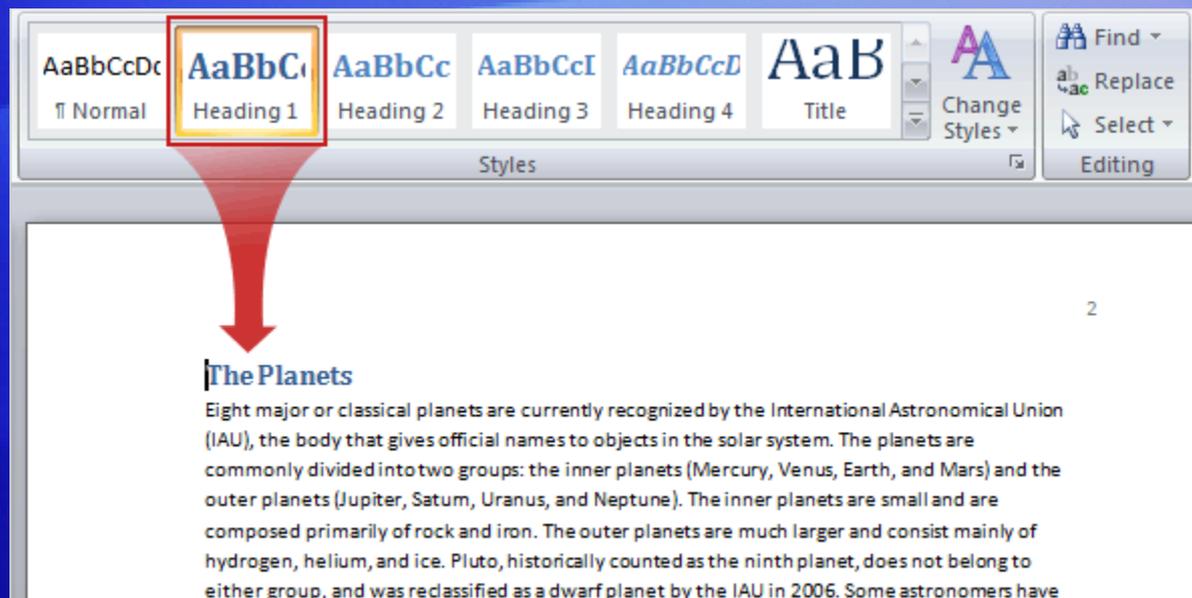
Step 1: Prepare your document



Heading styles are the link to building an automatic TOC.

So after you've decided on the chapter titles and headings that you want to appear in the TOC, you'll need to apply specific styles to them so that Word will include them in the TOC.

Step 1: Prepare your document



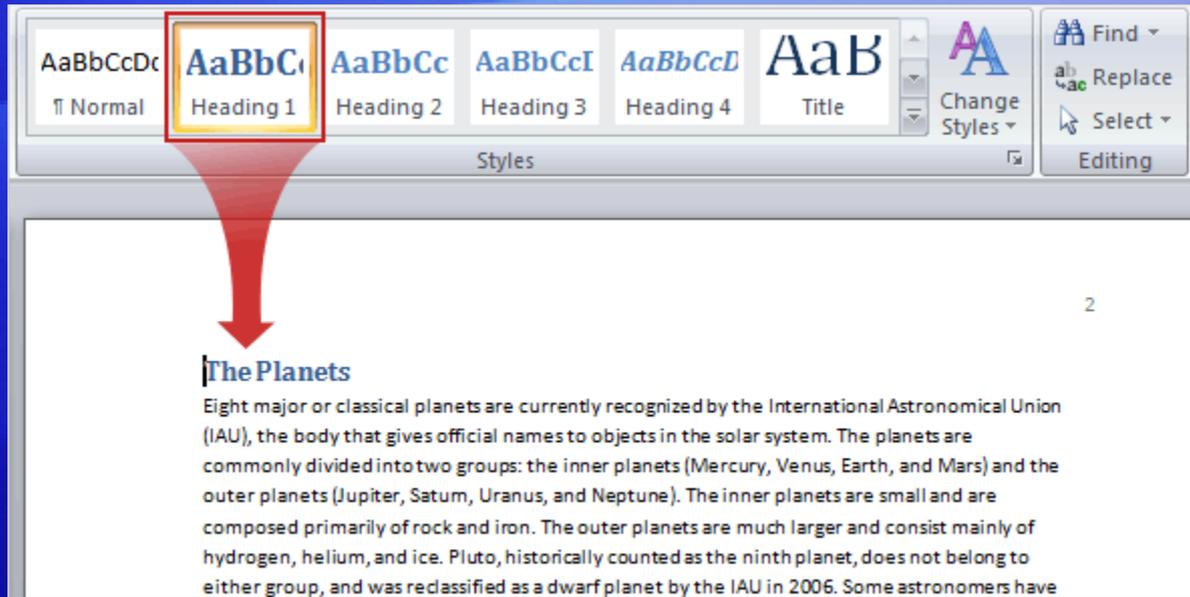
These styles are on the **Home** tab, in the **Styles** group.

For *each* chapter title and heading:

1. Place the cursor in the chapter title or heading.
2. In the **Styles** group, click **Heading 1** for the highest level, such as a chapter title; **Heading 2** for the next level, maybe a section heading; and **Heading 3** for a sub-heading.

Table of Contents I: Create an automatic TOC

Step 1: Prepare your document

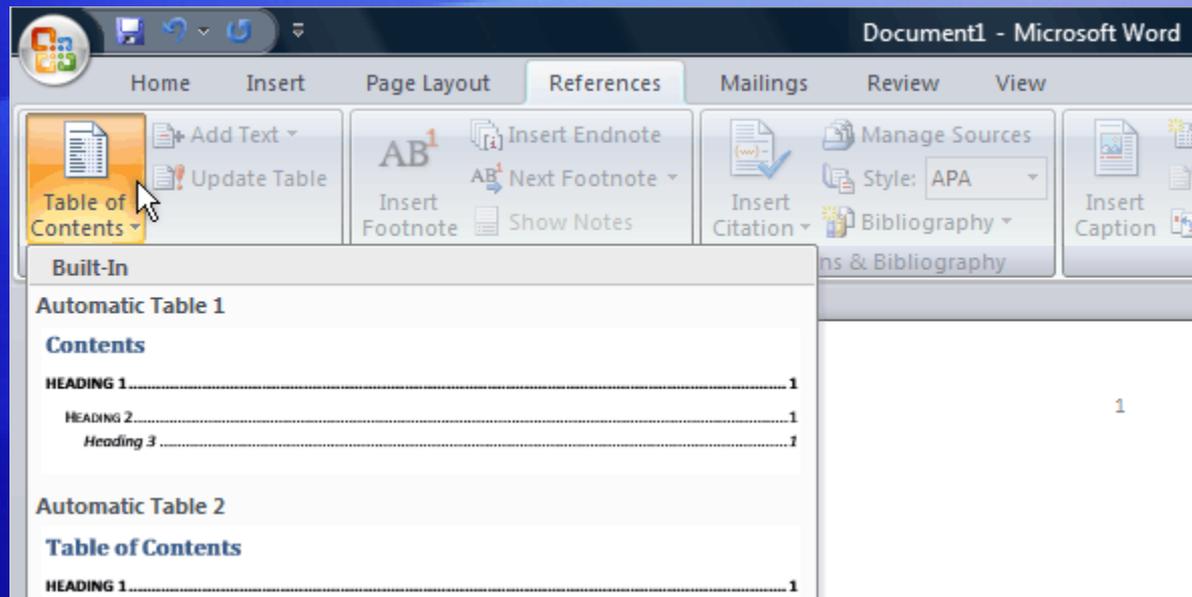


These styles are on the **Home** tab, in the **Styles** group.

The heading styles and the automatic TOC work together: Word designates Heading 1 titles to the highest level in the TOC; Heading 2 corresponds to the next highest level; and Heading 3 is the following level.

Table of Contents I: Create an automatic TOC

Step 2: Create your TOC



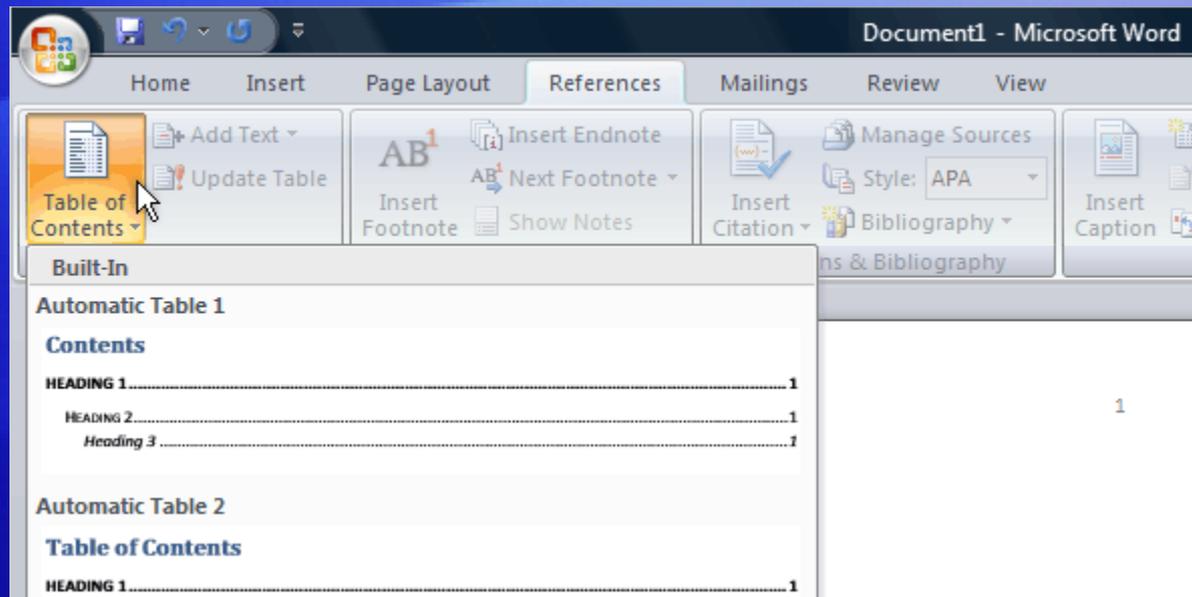
After the heading styles are applied, it's time to collect them all together in the TOC. This is where Word does the work for you.

First, place the cursor where you want the TOC to appear, usually at the beginning of the document.

Then, on the **References** tab, click **Table of Contents**, and click either **Automatic Table 1** or **Automatic Table 2**, whichever TOC looks best to you in the instant preview.

Table of Contents I: Create an automatic TOC

Step 2: Create your TOC



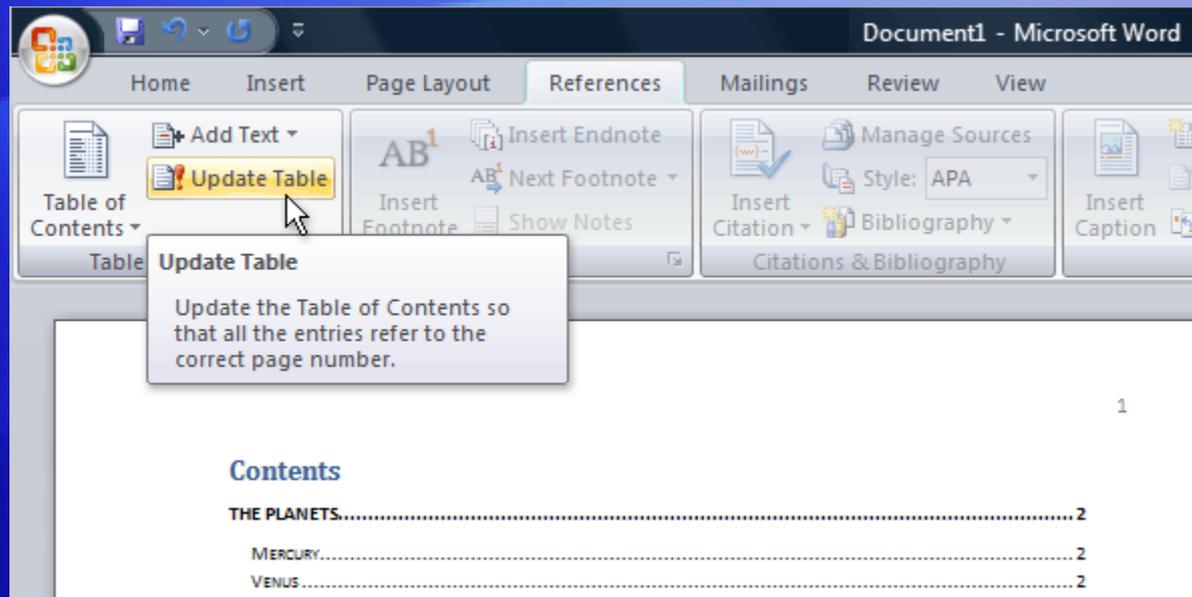
That's it! Quick and simple.

When you click in an automatic TOC, it will be displayed in a light blue box. This is okay; it's a visual cue to let you know that it's an automatic TOC.

Then when you move the pointer away from the TOC, the entries will turn gray and you will see the cursor where you initially clicked.

Table of Contents I: Create an automatic TOC

Update your TOC

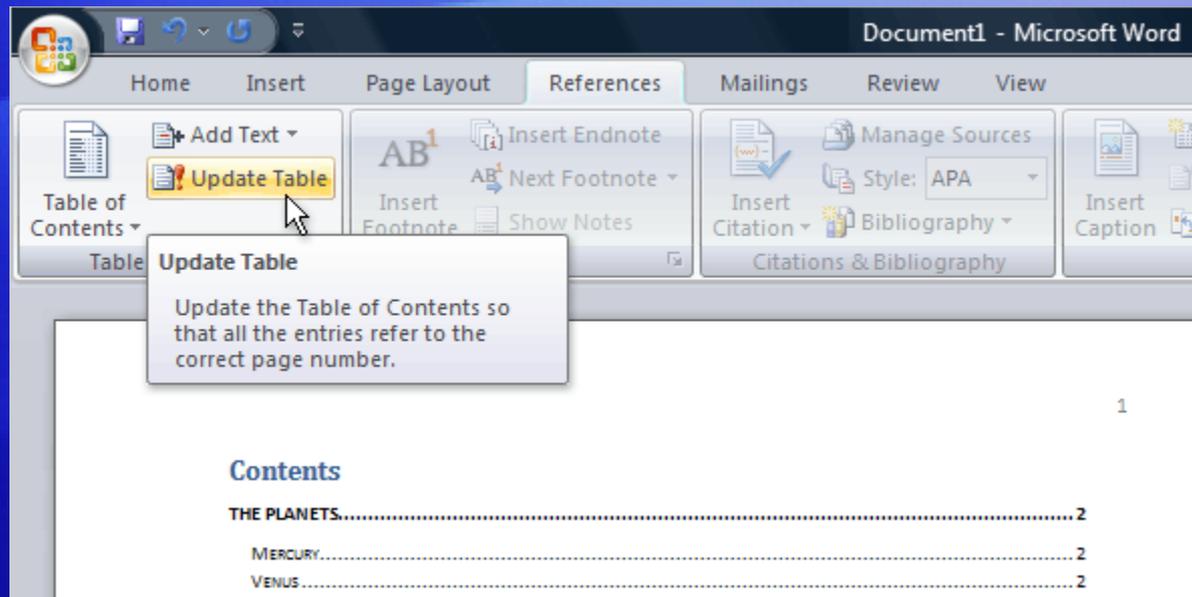


After you've created your TOC, you will probably have to maintain it.

The TOC is automatically updated whenever you open the document; but it's a good idea to also update it whenever you add more titles or headings in your document, or when you add more content that may affect the page numbers that appear in the TOC.

It's easy — just two steps.

Update your TOC

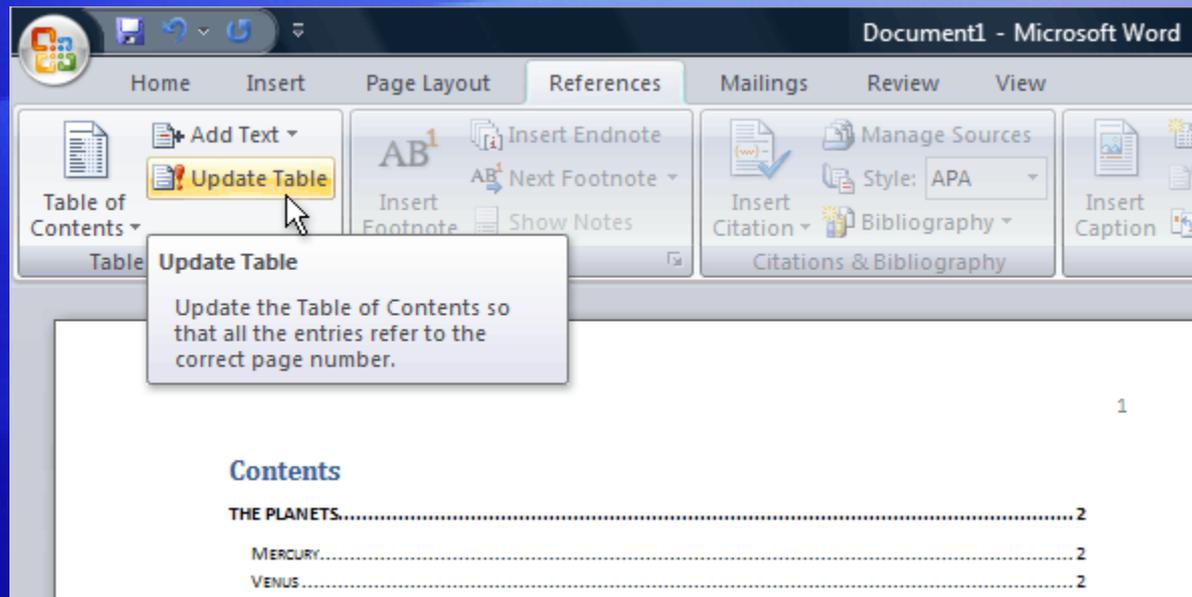


You update the TOC by clicking the **References** tab and then **Update Table** in the **Table of Contents** group.

When you update the TOC, you'll be asked if you want to update the entire TOC, or just the page numbers.

Choose the **page numbers** option only if you've been adding body text but no new headings — it's faster and will save you time in a long document.

Update your TOC



Avoid editing entries in the TOC itself — if you ever update the TOC you will lose those changes.

To change text that appears in the TOC, be sure to edit this text in the body of the document — not in the TOC — and then click **Update Table** to compile the changes.

More changes to your TOC?

There are many more ways that you can change your TOC.

The image shows three overlapping examples of a Table of Contents (TOC) for a document titled 'THE PLANETS'. Each example is presented on a white card with a blue header.

- Left Card:** Titled 'Contents'. It lists 'THE PLANETS' with a page number of 2. Below it, the planets and their moons are listed with dotted lines and page numbers: MERCURY (2), VENUS (2), EARTH (3) with 'The Moon' (3), MARS (4) with 'Phobos' (4) and 'Deimos' (4), JUPITER (4) with 'Io' (5), 'Europa' (5), and 'Ganymede' (5), SATURN (5) with 'Mimas' (6) and 'Titan' (6).
- Middle Card:** Titled 'Contents'. It lists 'THE PLANETS' with a horizontal line below it. Below the line, the planets and their moons are listed with solid lines and page numbers: MERCURY (2), VENUS (2), EARTH (3), THE MOON (3), MARS (4), PHOBOS (4), DEIMOS (4), JUPITER (4), IO (5), and EUROPA (5).
- Right Card:** Titled 'Contents'. It lists 'THE PLANETS' with a horizontal line below it. Below the line, the planets and their moons are listed with solid lines and page numbers, including 'GANYMEDE' (5) for Jupiter's moon.

Besides being able to choose from a variety of built-in styles and formats, you can also decide on the details for your TOC.

These include the number of levels, whether page numbers will be displayed, what the dots between the entry and the page number look like, and much more.

Table of Contents I: Create an automatic TOC

Suggestions for practice

1. Create a TOC by adding heading styles and collecting the text into the TOC.
2. Update your TOC.

[Online practice](#) (requires Word 2007)

Test question 1

Which of these is the correct way to create an automatic TOC? (Pick one answer.)

1. Prepare your document by assigning heading styles to the text you want in the TOC, and then use the **Table of Contents** command to collect that text together into a TOC.
2. Create a blank TOC and then copy and paste items into it.
3. Type out a separate document for the TOC.

Test question 1: Answer

Prepare your document by assigning heading styles to the text you want in the TOC, and then use the **Table of Contents** command to collect that text together into a TOC.

This is the quickest and easiest way to create a TOC.

Test question 2

An automatic TOC should be manually updated by typing new page numbers or text in it. (Pick one answer.)

1. True.
2. False.

Test question 2: Answer

False.

The TOC is automatic and should not be edited manually.

Test question 3

Before you create your TOC by clicking the Table of Contents command on the References tab, you must do which of the following? (Pick one answer.)

1. Create a new table for the TOC.
2. Add page numbers.
3. Place the cursor where you want the TOC.
4. Add a blank page.

Test question 3: Answer

Place the cursor where you want the TOC.

Always move the cursor first, or you'll end up with the TOC in the wrong location.

Quick Reference Card

For a summary of the tasks covered in this course, view the [Quick Reference Card](#).

JohnRouda.com presents:

Microsoft® Office Word 2007 Training

**Table of Contents II:
Customize your TOC**

Course contents

- Overview: Jazz it up
- Lesson 1: Change the appearance of your TOC
- Lesson 2: Include custom titles and headings in your TOC
- Lesson 3: Include outline levels in your TOC

Each lesson includes a list of suggested tasks and a set of test questions.

Overview: Jazz it up



You know how to create a table of contents; now take it to the next level. For example, your document headings are blue, and now you want your TOC to be blue also.

And if your document has custom styles for chapter titles and headings, and you need to include them into a TOC, it just takes a couple of clicks to add them.

This course will show you how.

Course goals

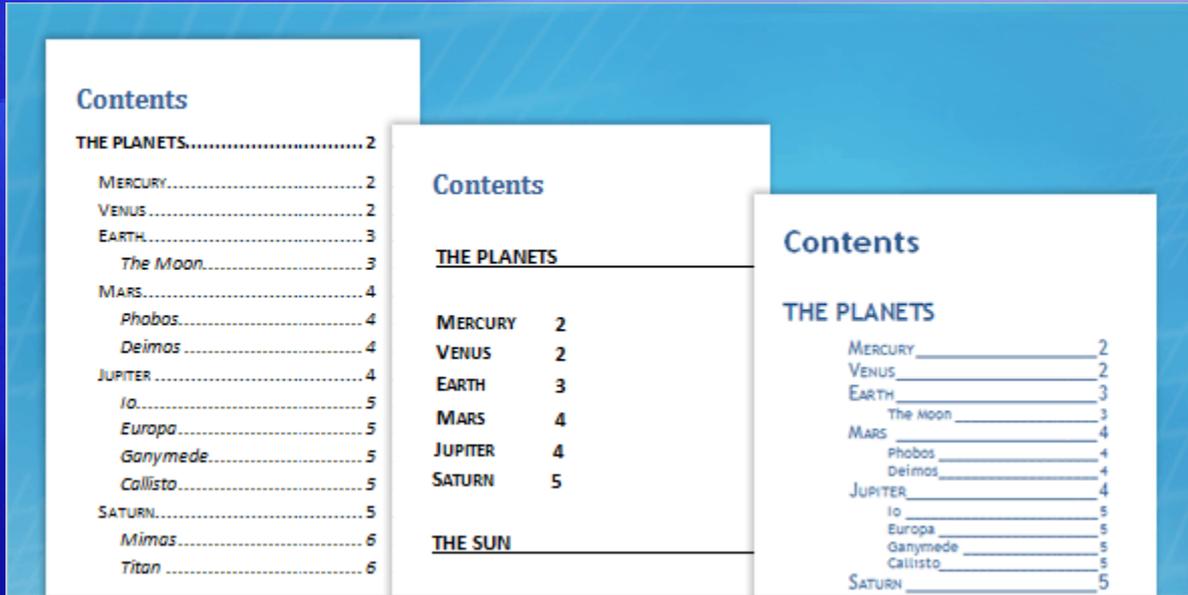
- Format a TOC to get it looking the way you want.
- Include custom chapter titles and headings in your TOC.
- Include outline levels in your TOC.

Lesson 1

Change the appearance
of your TOC

Change the appearance of your TOC

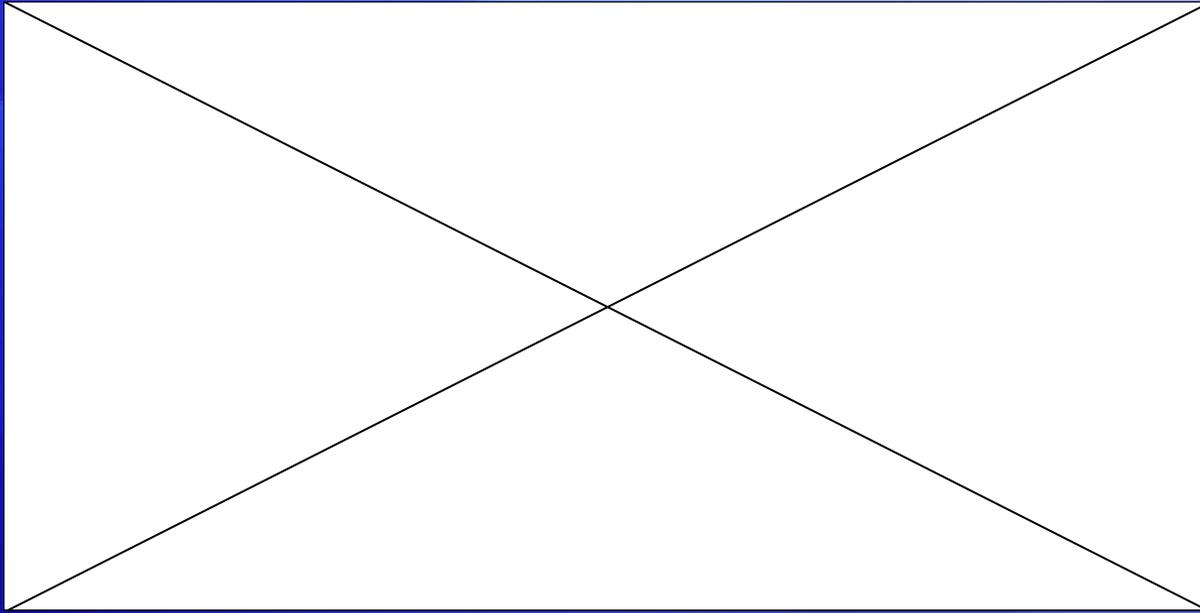
You've created an automatic table of contents, but now you feel like making some changes.



For example, maybe you'd like to make your TOC entries match the color of your document headings. Maybe you'd like to shorten your TOC.

Or, perhaps you're basically satisfied with the TOC but just want to make a minor change. All these changes, and more, are possible; this lesson will show you how.

Design the look of your TOC

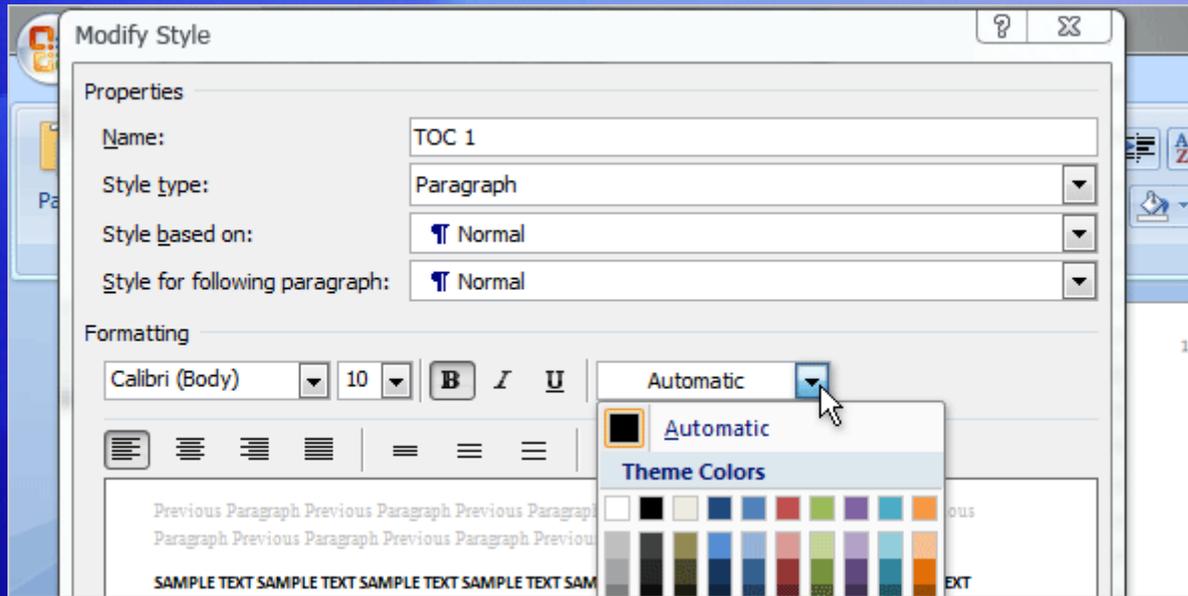


You built a TOC for your document and it looks okay, but you want color in it — the same color as your document chapter titles and headings.

Animation: Right-click, and click **Play**.

The animation shows you how to get the effect you want.

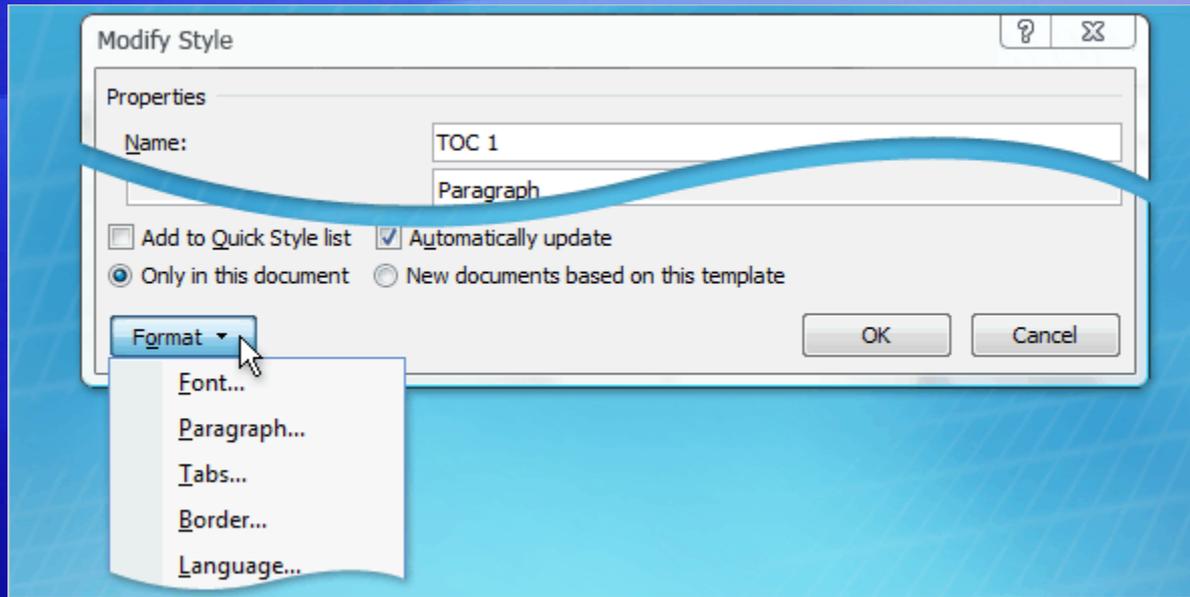
Design the look of your TOC



You built a TOC for your document and it looks okay, but you want color in it — the same color as your document chapter titles and headings.

It's easy to do in the **Modify Style** dialog box, as shown here.

More changes that you can make

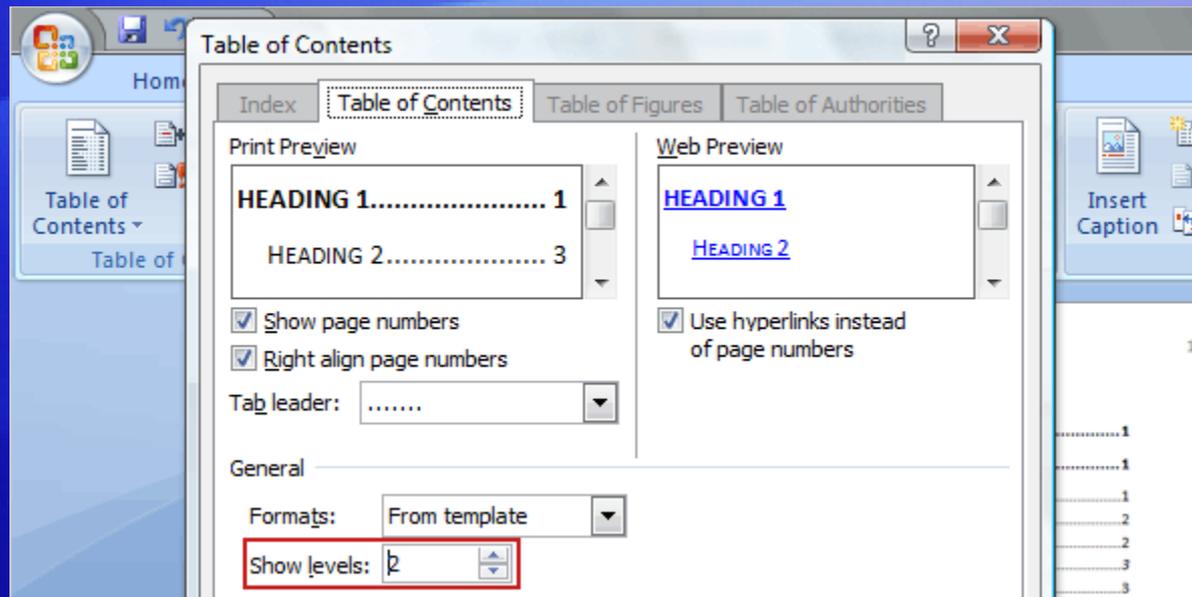


Want to make more changes? There are many other options available to you in the **Modify Style** dialog box that let you completely tailor your TOC.

Notice that if you click **Format**, you have access to changes such as font, paragraph, tabs, and so on.

You can change these settings and view them in the preview areas before you apply them to the TOC.

Shorten or lengthen your TOC

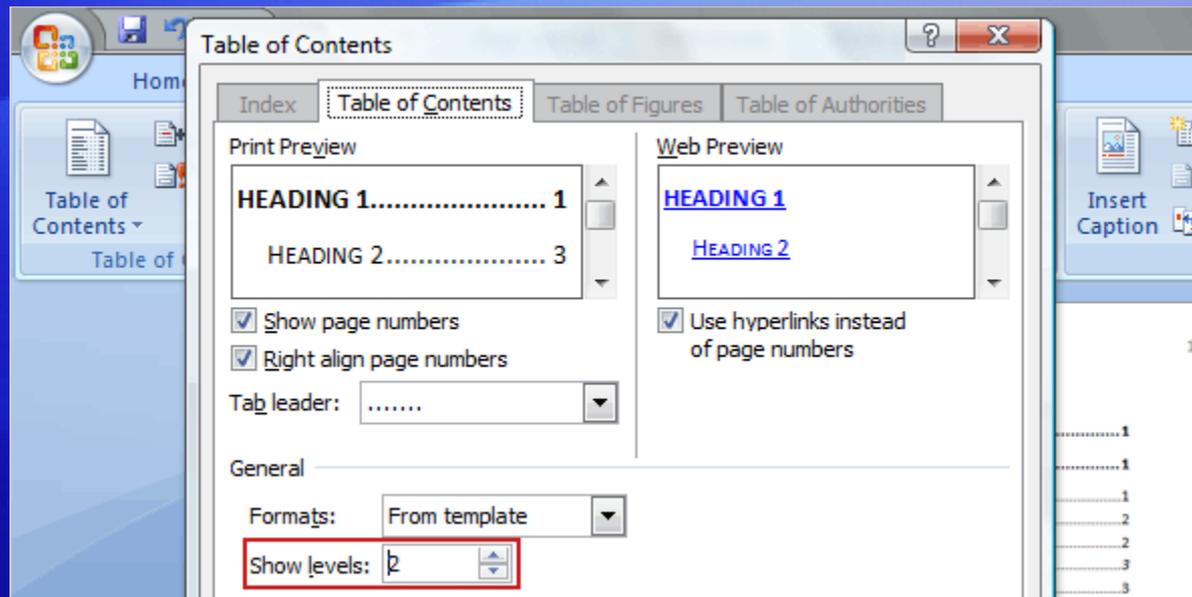


Is your TOC too long?

Maybe the first two levels (TOC 1, and TOC 2) are all you need for your document.

The **Show levels** box in the **Table of Contents** dialog box is where you can choose the number of hierarchical levels you want displayed in your TOC, up to nine.

Shorten or lengthen your TOC



Is your TOC too long?

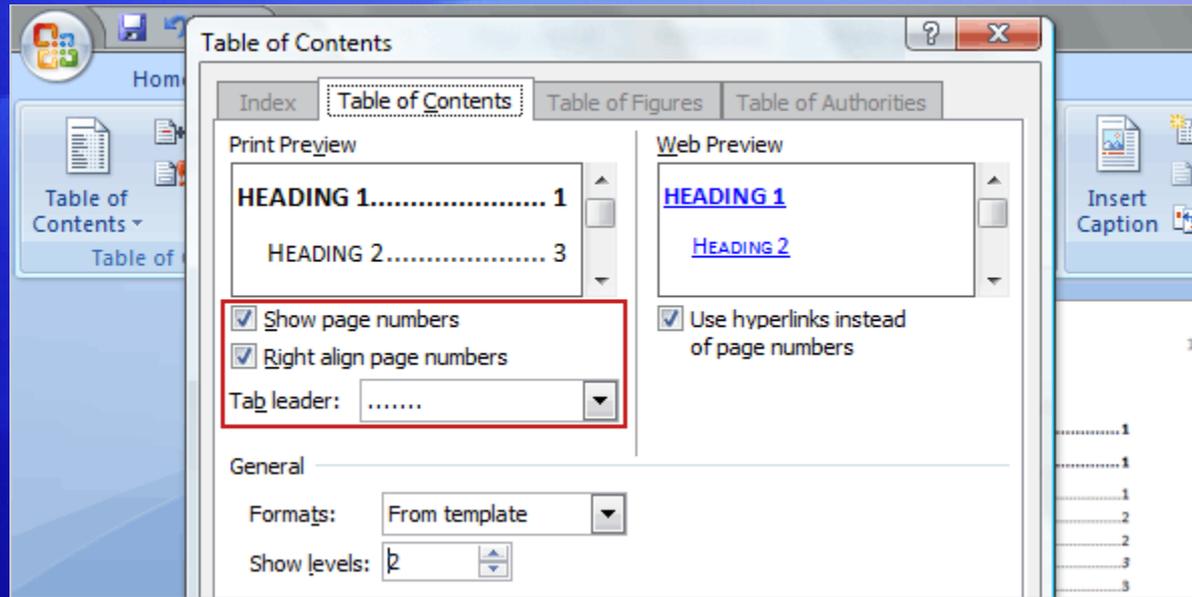
Maybe the first two levels (TOC 1, and TOC 2) are all you need for your document.

Shorten your TOC by lowering the number; lengthen your TOC by increasing the number.

You can look in the **Print Preview** or **Web Preview** area to see your changes before you apply them. When you're sure it's what you want, just click **OK** twice.

Table of Contents II:
Customize your TOC

Make simple changes



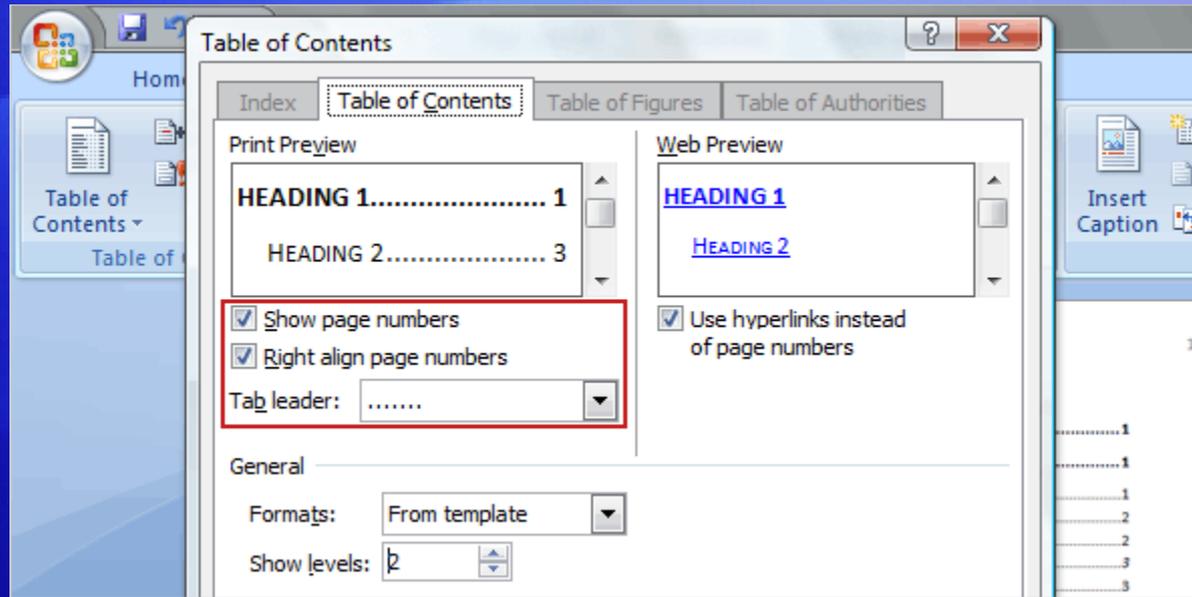
You don't have to get drastic with your TOC.

You can just make minor adjustments, without leaving the **Table of Contents** dialog box.

For example, change the dots or dashes between the TOC entry and the page number (tab leaders) or the alignment of the page numbers.

If you're writing for the Web, maybe you don't need page numbers at all!

Make simple changes

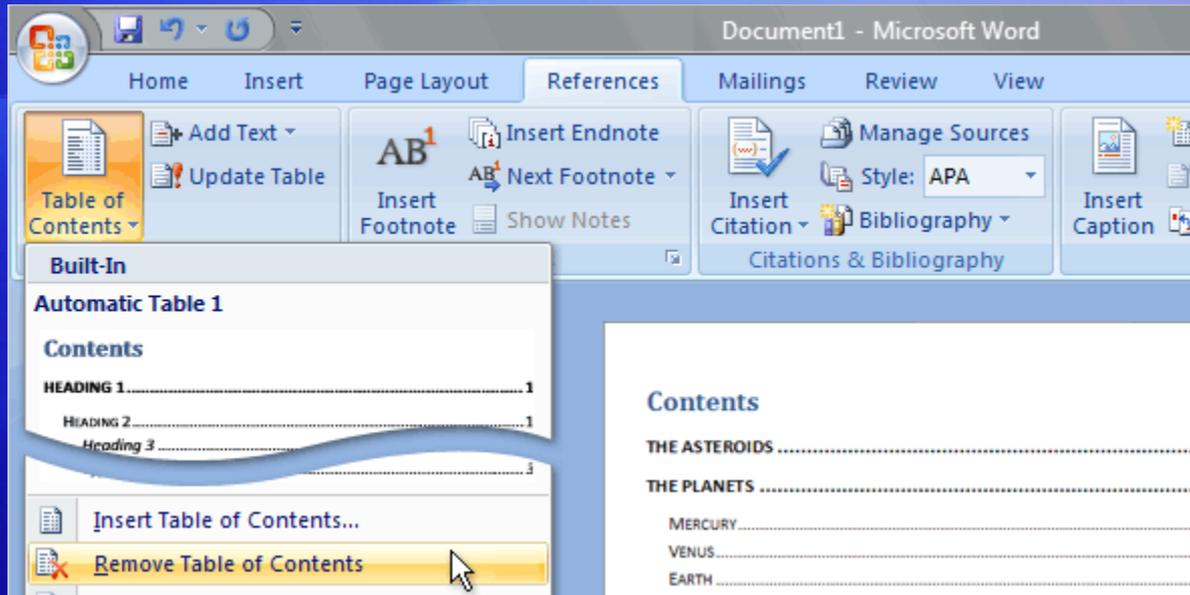


To change the tab leaders, click the **Tab leader** arrow to view different types of dashes and lines.

If you clear the **Right align page numbers** box, the page numbers will move closer to the TOC entries and the tab leaders will no longer be available.

If you want to delete the page numbers entirely, clear the **Show page numbers** check box.

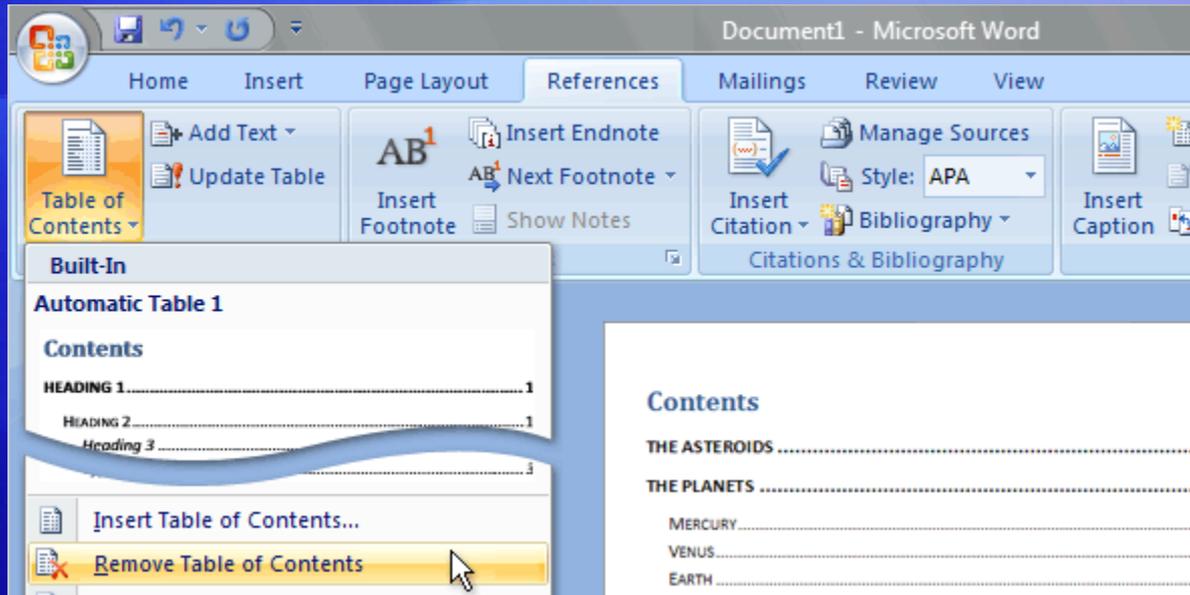
Start over: Remove or reset your TOC



Did you get lost making changes to your TOC and now you wish you could start over?

Click the **Table of Contents** command, and then click **Remove Table of Contents**, at the bottom of the list.

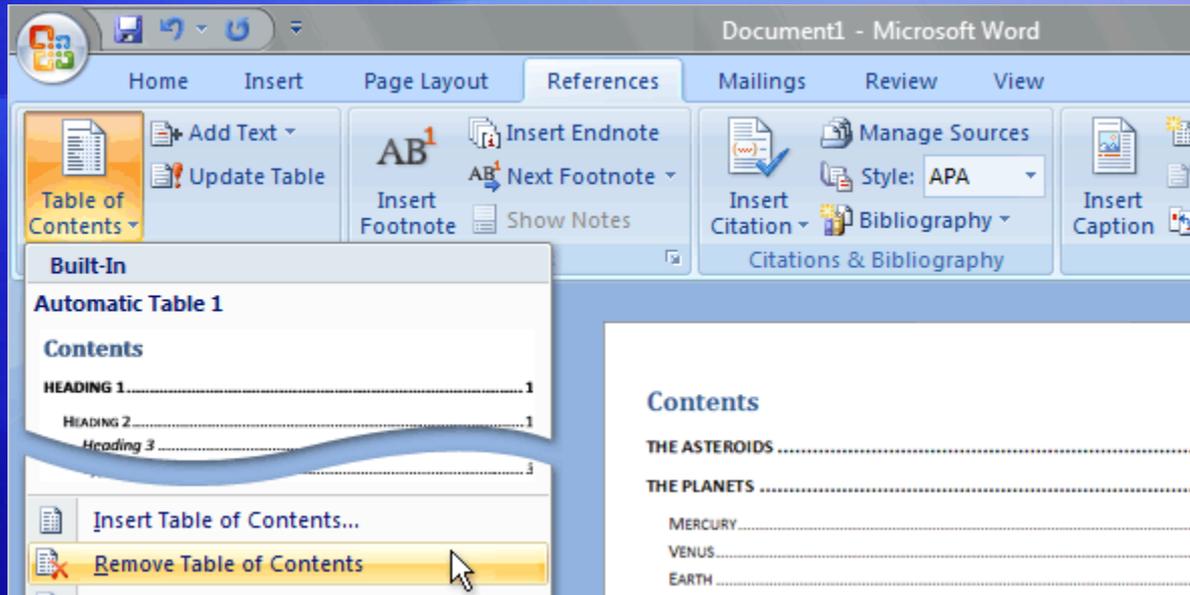
Start over: Remove or reset your TOC



Did you get lost making changes to your TOC and now you wish you could start over?

Be sure to use the **Remove Table of Contents** command; if you manually delete the TOC, there is a possibility that hidden code might be left in your document and cause incorrect references in any future TOC that is built.

Start over: Remove or reset your TOC



Did you get lost making changes to your TOC and now you wish you could start over?

You can also return to the default settings — Heading 1, Heading 2, Heading 3 styles as Level 1, Level 2, Level 3 — by clicking **Insert Table of Contents** from the **Table of Contents** command, then clicking **Options** and then **Reset**.

Suggestions for practice

1. Match the color of your dominant headings.
2. Shorten your TOC.
3. Format tab leaders and page numbers.

[Online practice](#) (requires Word 2007)

Test 1, question 1

The Show levels box on the Table of Contents dialog box is where you can shorten or lengthen your TOC. (Pick one answer.)

1. True.
2. False.

Test 1, question 1: Answer

True.

In the **Show levels** box, you can add or subtract levels in your TOC.

Test 1, question 2

Changing the TOC 1 style will change the Heading 1 style in your document. (Pick one answer.)

1. True.
2. False.

Test 1, question 2: Answer

False.

TOC styles and heading styles are completely separate.

Test 1, question 3

What's a tab leader? (Pick one answer.)

1. The row of characters between a TOC entry and the page number.
2. The space the insertion point moves when you press the TAB key.
3. The name of a tab in a dialog box.

Test 1, question 3: Answer

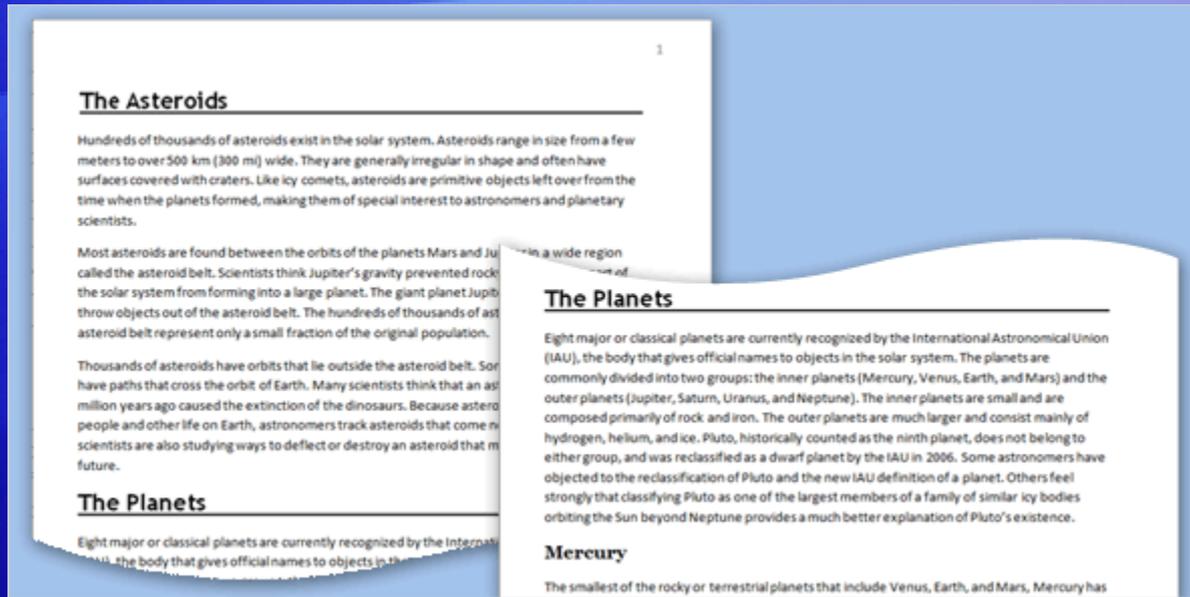
The row of characters between a TOC entry and the page number.

The tab leader can be dots, dashes, or a straight line. Alternatively, you can choose not to have one at all.

Lesson 2

Include custom titles and headings in your TOC

Include custom titles and headings in your TOC



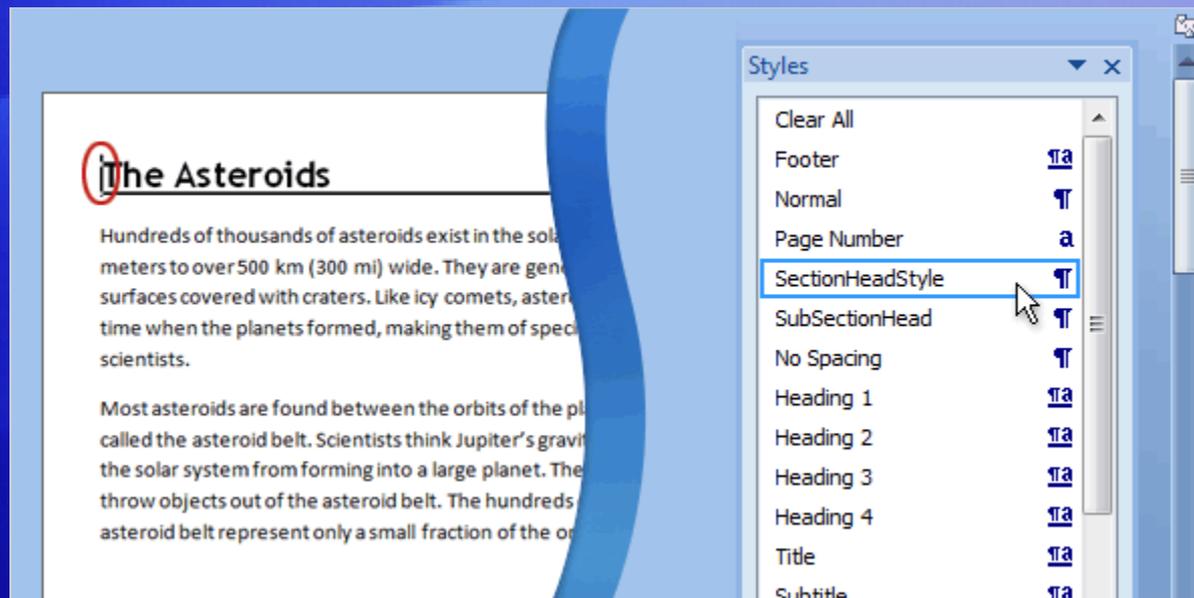
In the first lesson you learned how to customize the look of your automatic TOC entries.

Suppose you've inherited a document that uses Word's predefined Heading 1, Heading 2, and Heading 3 styles as well as custom-styled headings.

Fortunately, building a TOC that includes both kinds of headings, predefined and custom, is not hard. In fact, it takes just a couple of clicks.

Table of Contents II:
Customize your TOC

Identify the heading styles used in the document



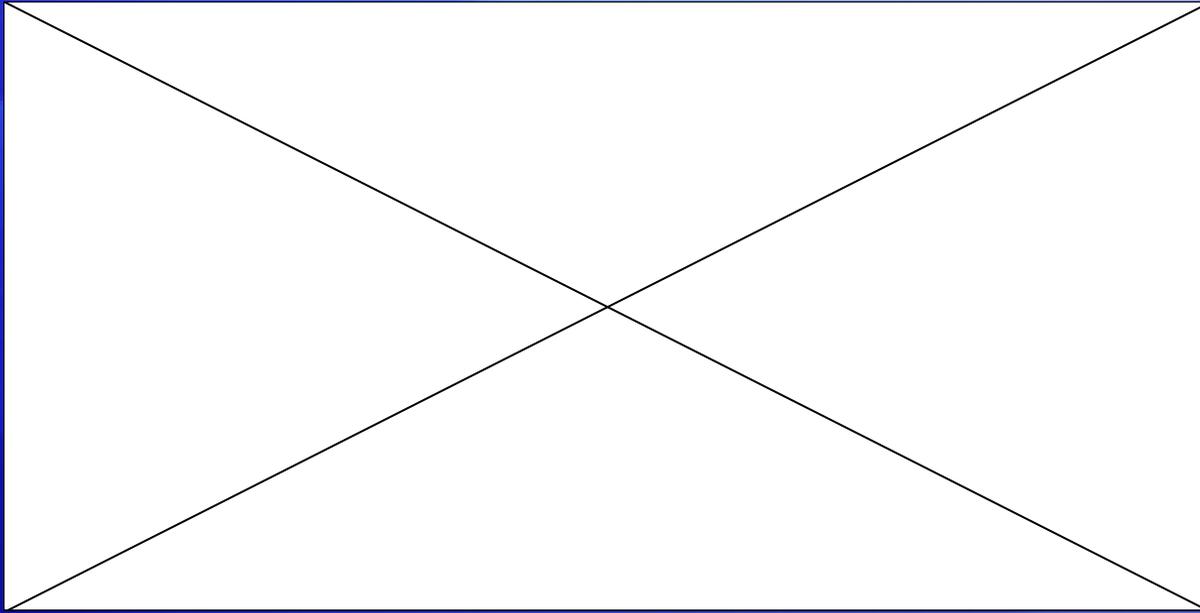
First, find out what styles are used for the custom titles and headings in the document.

Word does not include these custom styles in the TOC — you must set them up manually.

To view the styles, click the **Styles** Dialog Box Launcher  on the **Home** tab. Then click in the document in the heading that you want to identify.

Note the style name in the **Styles** box so that you can find it in the **Table of Contents** dialog box in the next step.

Include the custom heading styles in your TOC

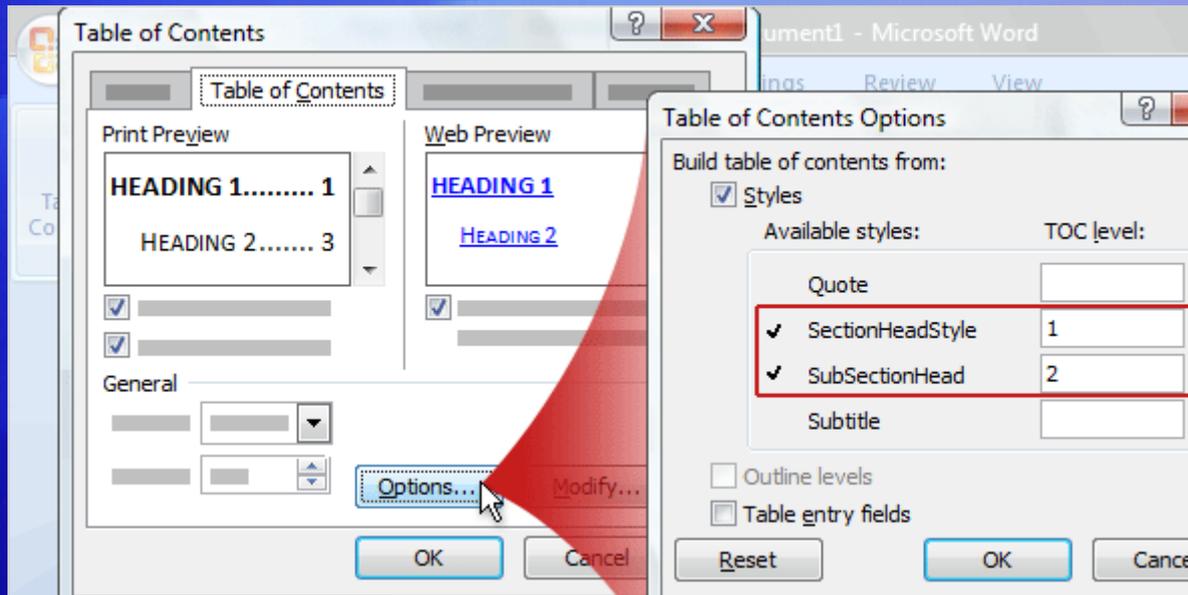


After identifying the styles used in a document, you set up the TOC to collect those custom headings along with Heading 1, Heading 2, and Heading 3.

Animation: Right-click, and click **Play**.

The animation shows how a custom style is added to a TOC.

Include the custom heading styles in your TOC



After identifying the styles used in a document, you set up the TOC to collect those custom headings along with Heading 1, Heading 2, and Heading 3.

On the **References** tab, click **Table of Contents**, click **Insert Table of Contents**, and then click **Options**.

Under **Available styles**, find the name of the style that was used for the chapter titles or headings. Next to each style, type a number from 1 to 9 to indicate the level that you want the custom style to appear as.

Suggestions for practice

1. View custom styles.
2. Create an automatic TOC.
3. Include custom styles in the TOC.

[Online practice](#) (requires Word 2007)

Test 2, question 1

Which dialog box do you use to add custom styles to your TOC? (Pick one answer.)

1. The **Modify Styles** dialog box.
2. The **Formats** dialog box.
3. The **Table of Contents Options** dialog box.
4. All of the above.

Test 2, question 1: Answer

The **Table of Contents Options** dialog box.

Look in the **Available styles** list to find the custom style, and then type in the level that you want it to appear as in the TOC.

Test 2, question 2

You can use the Available styles list to create a custom style and assign it a level in the TOC. (Pick one answer.)

1. True.
2. False.

Test 2, question 2: Answer

False.

The list includes existing pre-defined and custom styles only. Make sure you know the name of the style that you want to include in the TOC.

Test 2, question 3

You can have up to nine levels in your TOC. (Pick one answer.)

1. True.
2. False.

Test 2, question 3: Answer

True.

The nine levels correspond to the nine heading styles in Word.

Lesson 3

Include outline levels in your TOC

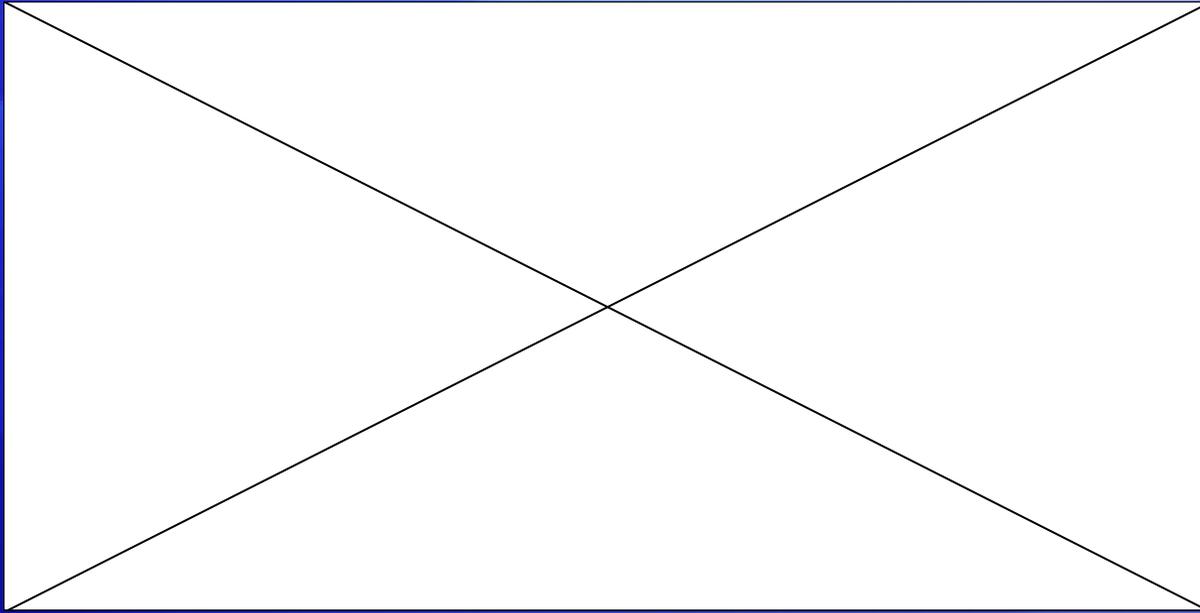
Include outline levels in your TOC



Using Word's built-in heading styles in your document makes for a quick and easy way of building a TOC.

But if you're fond of outlining, you can create a document outline and set up the TOC all at the same time. Word's outline feature automatically includes the entries in your TOC.

Assign outline levels



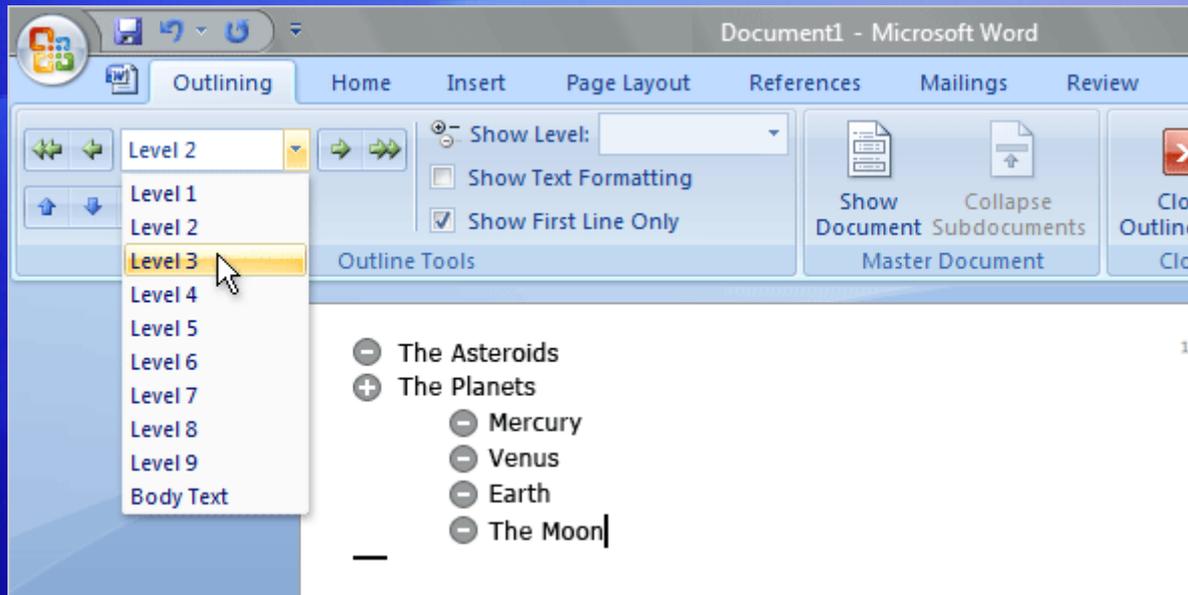
Start your outline by clicking the **View** tab, then clicking **Outline** in the **Document Views** group, and begin typing.

Animation: Right-click, and click **Play**.

The animation shows the remainder of the process.

Note that as you work on your outline, the entries for your TOC are set up automatically, with no extra steps required.

Assign outline levels

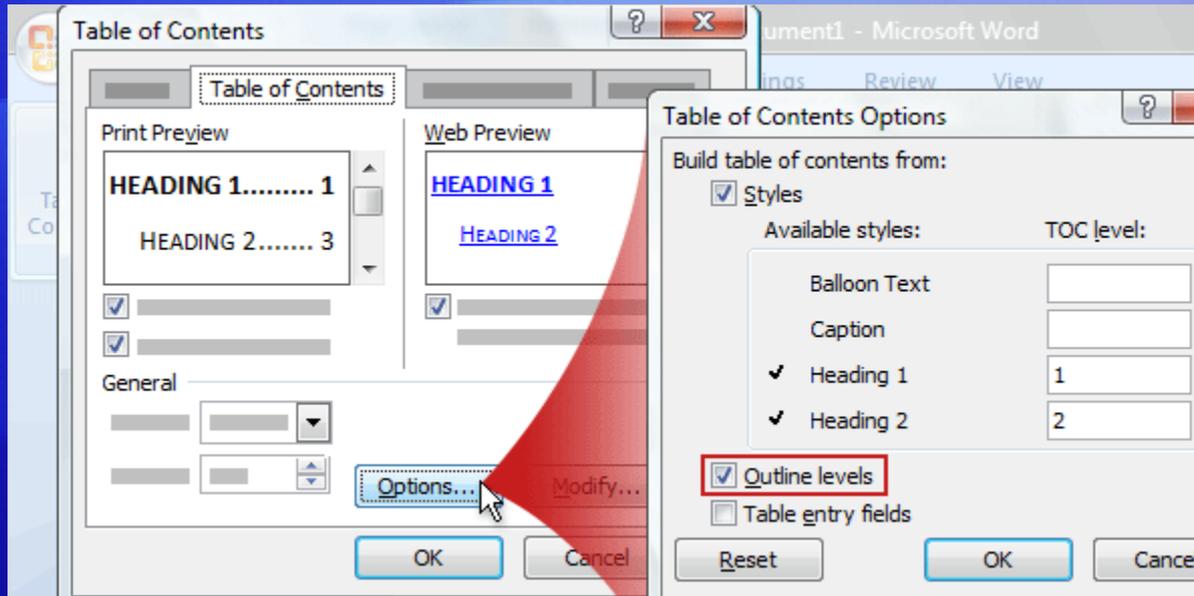


Start your outline by clicking the **View** tab, then clicking **Outline** in the **Document Views** group, and begin typing.

As you decide on the hierarchal level for the paragraph, simply click the **Outline Level** box in the **Outline Tools** group and then click a level from 1 to 9.

As you work on your outline, the entries for your TOC are set up automatically; no extra steps are required.

Add the outline levels to your TOC



When you've finished outlining your document, everything is ready for you to create or update your TOC.

Simply click **Table of Contents** on the **References** tab and choose either a built-in table, or, if you have an existing TOC, click **Update Table**.

The levels you designated in the Outlining tool will be collected into the TOC.

Suggestions for practice

1. Mark some outline levels.
2. Build the TOC with outline levels.

[Online practice](#) (requires Word 2007)

Test 3, question 1

Which method of creating TOCs is the easiest to use when you're outlining a document? (Pick one answer.)

1. Heading styles.
2. Outline levels.
3. Custom styles.
4. All of the above.

Test 3, question 1: Answer

Outline levels.

Test 3, question 2

When you use the Outlining tool, Word applies heading styles automatically. (Pick one answer.)

1. True.
2. False.

Test 3, question 2: Answer

True.

Level 1, Level 2, and Level 3 from the Outlining tool are tied to Heading 1, Heading 2, Heading 3.

Test 3, question 3

There are extra steps you need to take to create a TOC when you use outlining. (Pick one answer.)

1. True.
2. False.

Test 3, question 3: Answer

False.

When you have finished outlining your document, everything is ready for you to create your TOC.

Quick Reference Card

For a summary of the tasks covered in this course, view the [Quick Reference Card](#).

JohnRouda.com presents:

Microsoft® Office Word 2007 Training

**Revise documents with Track
Changes and Comments**

Course contents

- Overview: Make revisions that others can see
- Lesson 1: Track Changes and Comments: The basics
- Lesson 2: Track Changes and Comments: Beyond the basics

Each lesson includes a list of suggested tasks and a set of test questions.

Overview: Make revisions that others can see



You have a document to review before it's sent to a group of employees, and you want to make revisions that your manager can see and then decide if they get accepted or rejected.

Track Changes and Comments enables you to add revisions and comments for others to see, hide them so that others can't see them, and review changes before finalizing the document.

This course shows you how.

Course goals

- Use Track Changes when you want to mark up documents with revisions.
- Review tracked changes, and accept or reject them.
- Insert, view, edit, and delete comments.
- Review documents to ensure that no unwanted revisions or comments remain in the distributed documents.

Lesson 1

Track Changes and Comments:
The basics

Track Changes and Comments: The basics



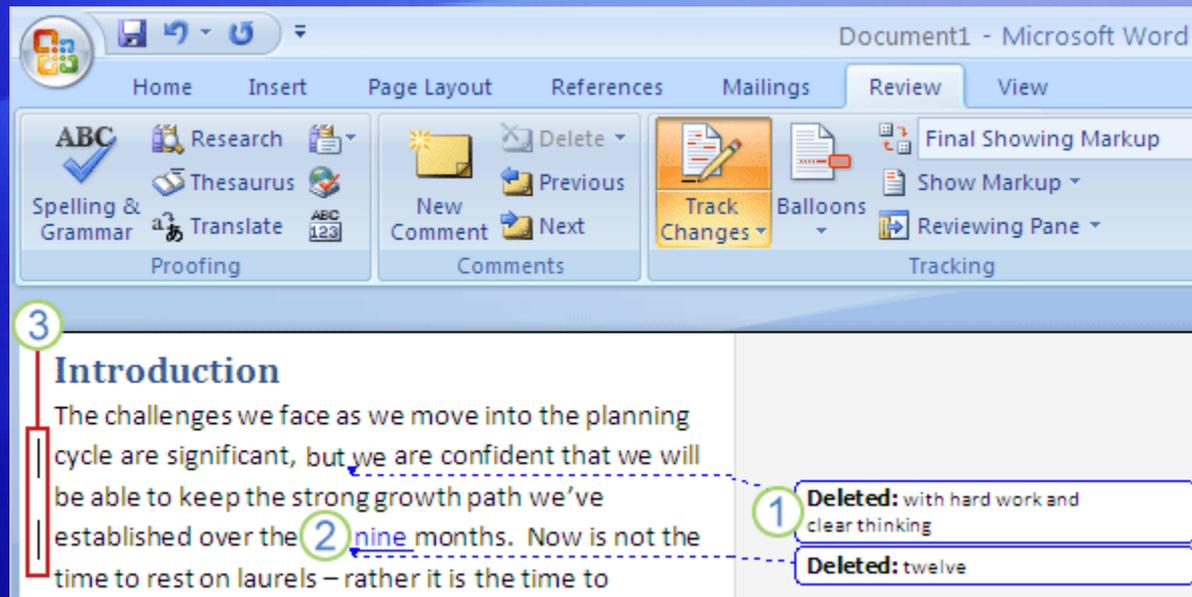
You're reviewing a document for your manager before it's sent to your entire organization.

You notice changes you want to make, which you also want your manager to see.

When you turn on Track Changes, Word inserts marks that show where deletions, insertions, and formatting changes are made.

To turn on Track Changes, on the **Review** tab, in the **Tracking** group, click **Track Changes**.

See revisions

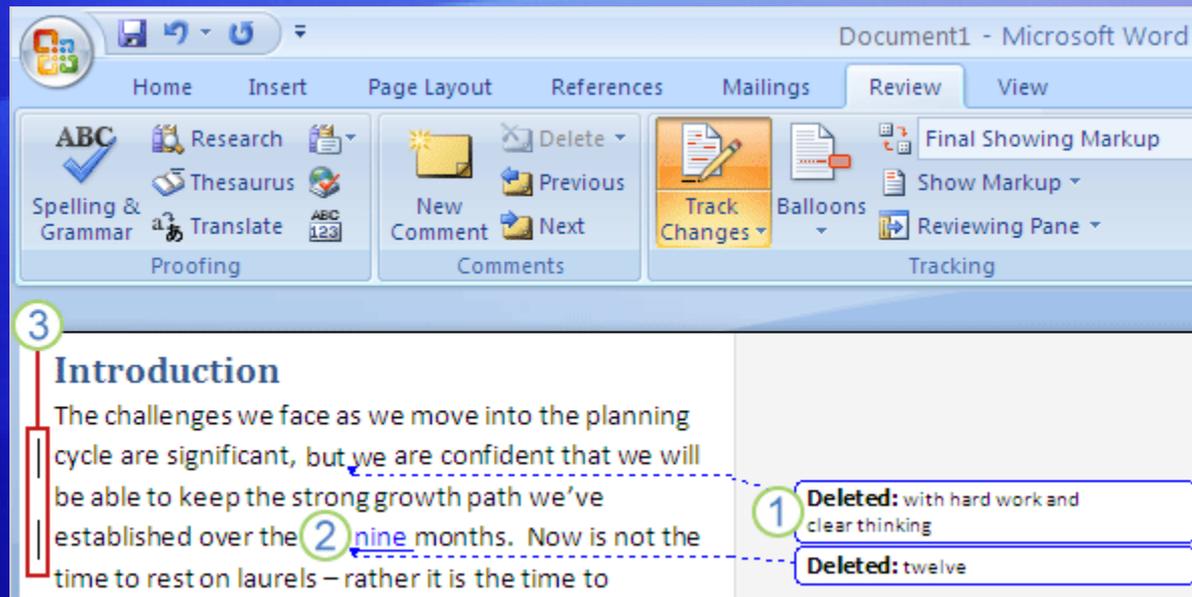


After you turn Track Changes on, work in Word as you normally do.

As you insert or delete text, or move text or graphics around, each change appears with **markup** — marks such as colors and lines that show where each revision is and what it is.

Revise documents with Track Changes
and Comments

See revisions

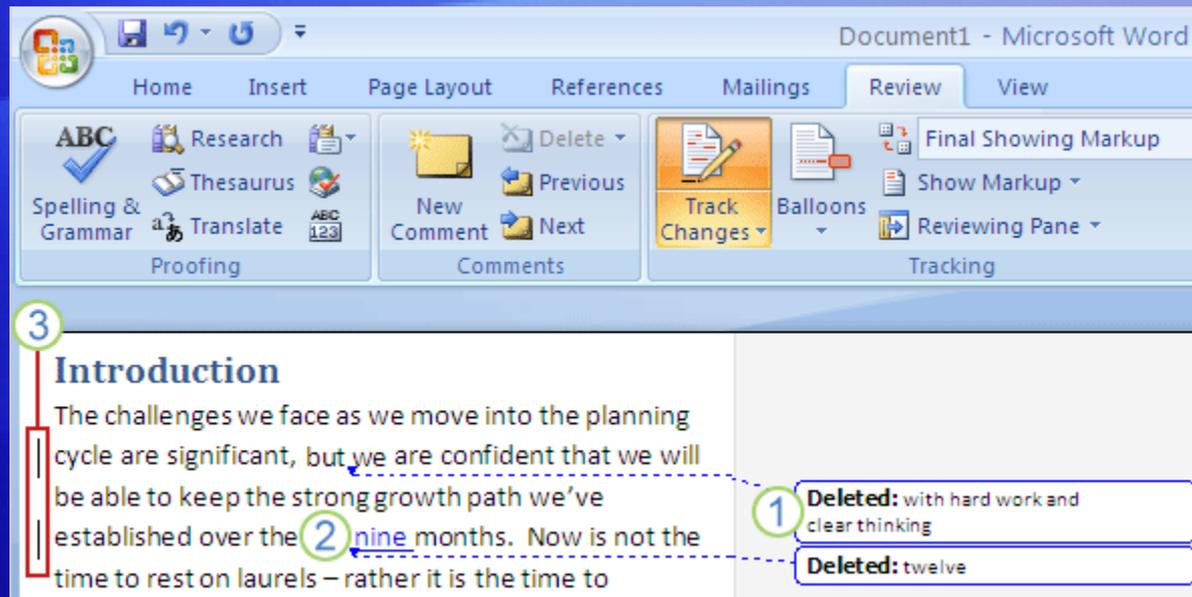


The picture shows how markup looks when you make changes in your document.

- 1 When you delete the text “with hard work and clear thinking,” the deleted text is put in a **balloon** in the document margin.
- 2 To replace “twelve” with “nine,” you select “twelve” and type “nine” over it. “Twelve” goes into a balloon in the document margin; the newly inserted “nine” is underlined.

Revise documents with Track Changes
and Comments

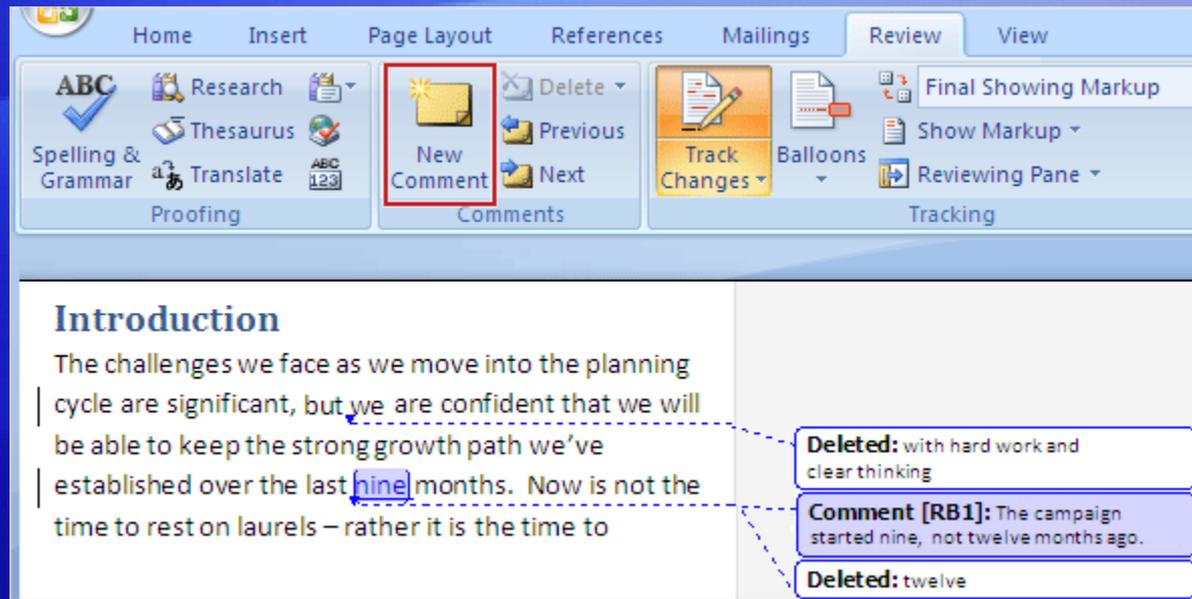
See revisions



The picture shows how markup looks when you make changes in your document.

- 3** A vertical line appears in the left margin next to each sentence with tracked changes. This is an additional signal that there are changes in some sentences.

Insert a comment

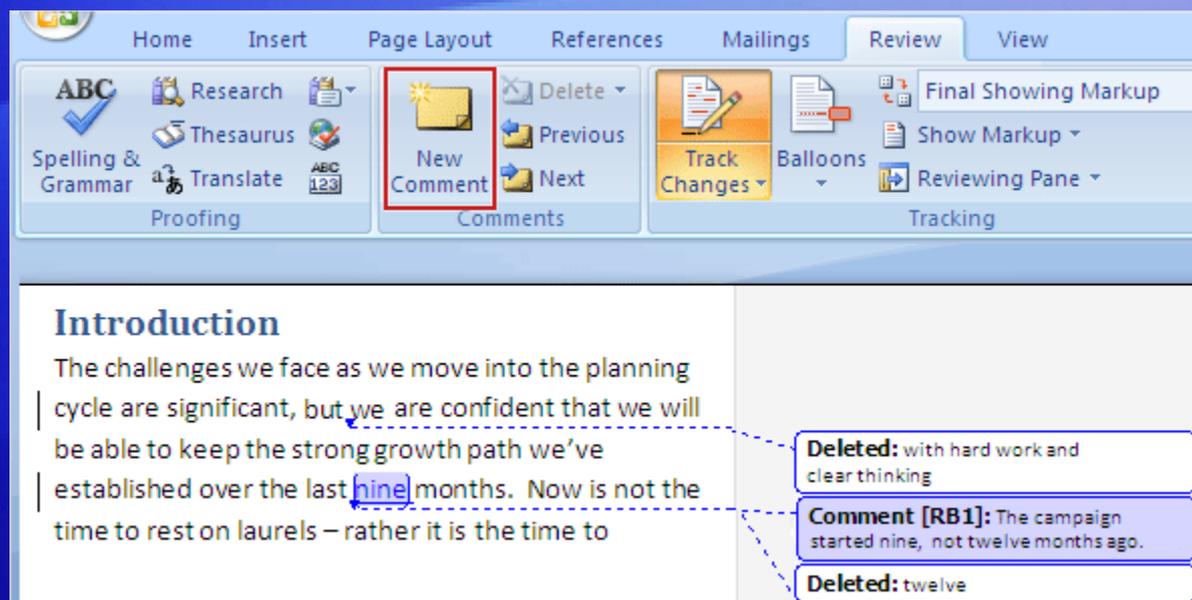


You made some revisions, but you'd also like to explain why you deleted "twelve" in the first sentence.

No problem: Insert a **comment**, which is an annotation that you can add to the document.

To do that, place the cursor at the end of the text you want to comment on, "nine" in this example. On the **Review** tab, in the **Comments** group, click **New Comment**.

Insert a comment

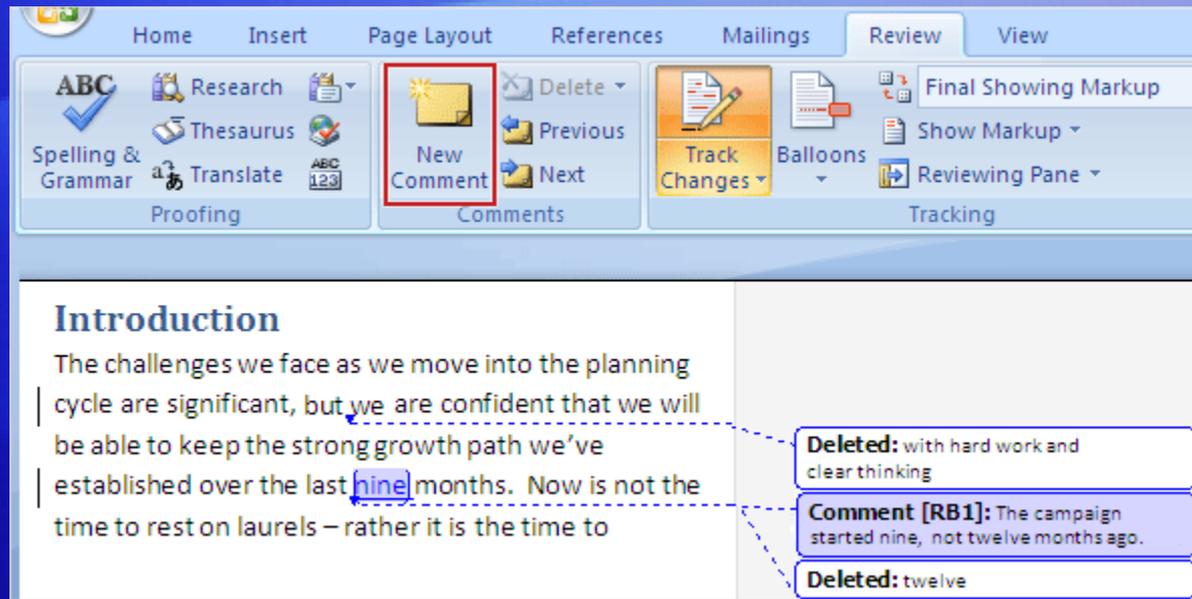


A comment balloon appears in the document margin. The text you are commenting on, “nine,” is highlighted with your review color. You type your text in the comment balloon.

Here's how to tell the difference between a comment balloon and a deleted text balloon:

- The solid color background in the comment balloon. A deleted text balloon has color only around its outside border.

Insert a comment

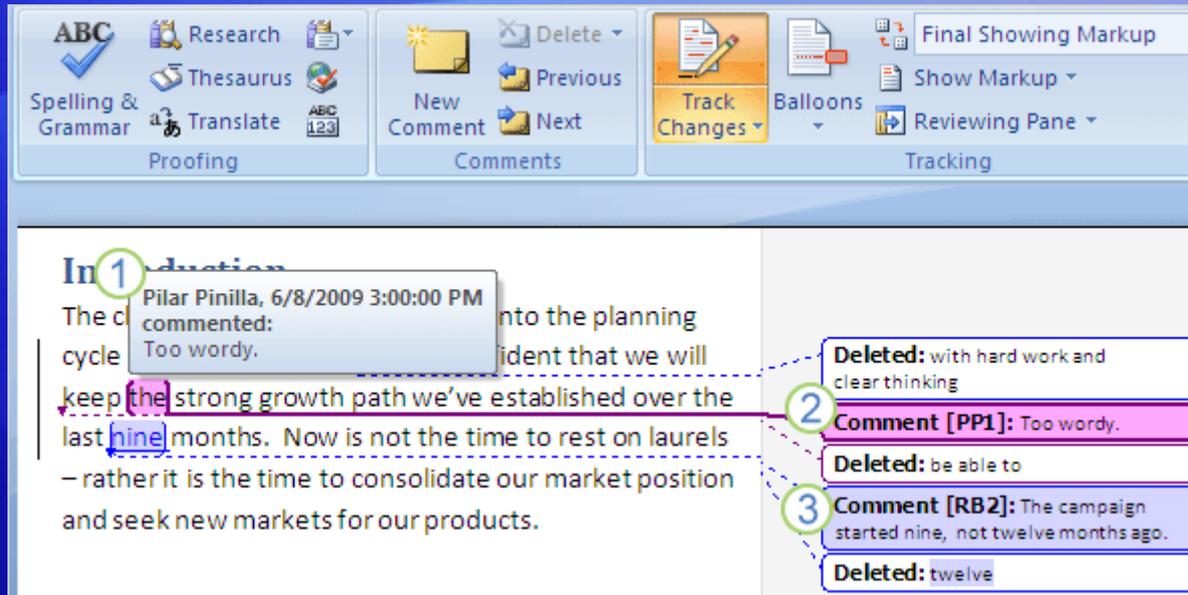


A comment balloon appears in the document margin. The text you are commenting on, “nine,” is highlighted with your review color. You type your text in the comment balloon.

Here's how to tell the difference between a comment balloon and a deleted text balloon:

- The “Comment” label in the balloon.
- The reviewer's initials in the balloon.

How to tell which reviewer has done what

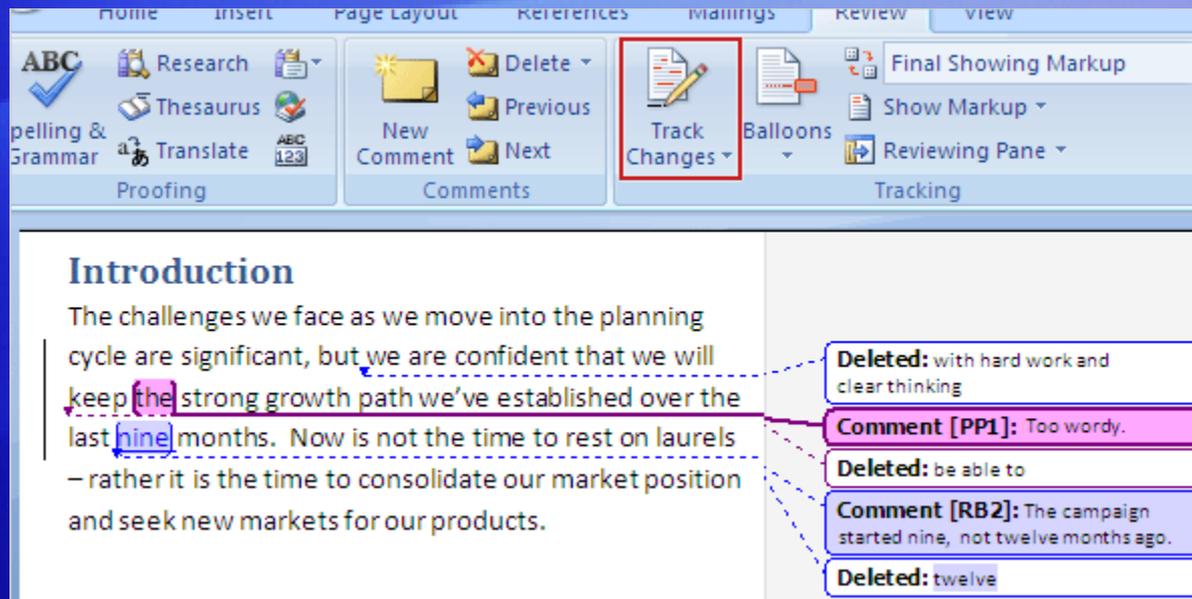


When more than one person reviews a document, you might want to know what changes were made by which reviewer.

Here are some ways to tell who did what.

- 1 See who made a comment by moving the mouse pointer over it in the document.
- 2 Look at the color of the revision. Pilar Pinilla's comments (PP) appear in one color...
- 3 ...while Richard Bready's comments (RB) appear in another.

Turning off doesn't mean deletion



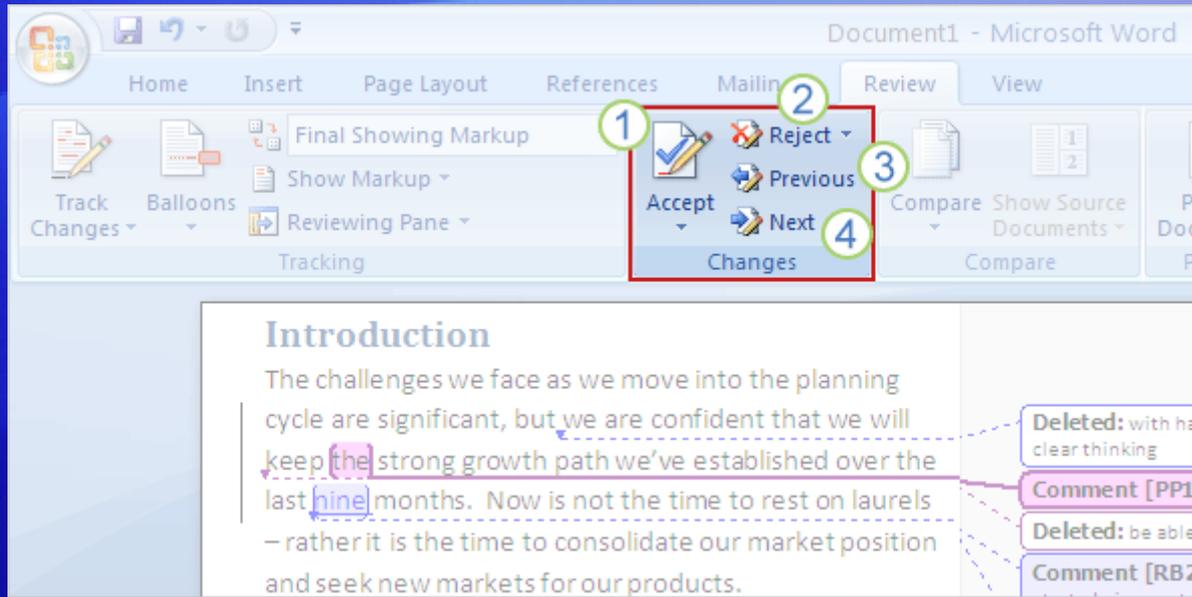
In case you wondered, turning Track Changes off does **NOT** delete tracked changes — or comments.

Here's what it does do.

All tracked changes already made up to that point remain in your document, even though Track Changes is turned off.

Any revisions you go on to make will not be marked as revisions.

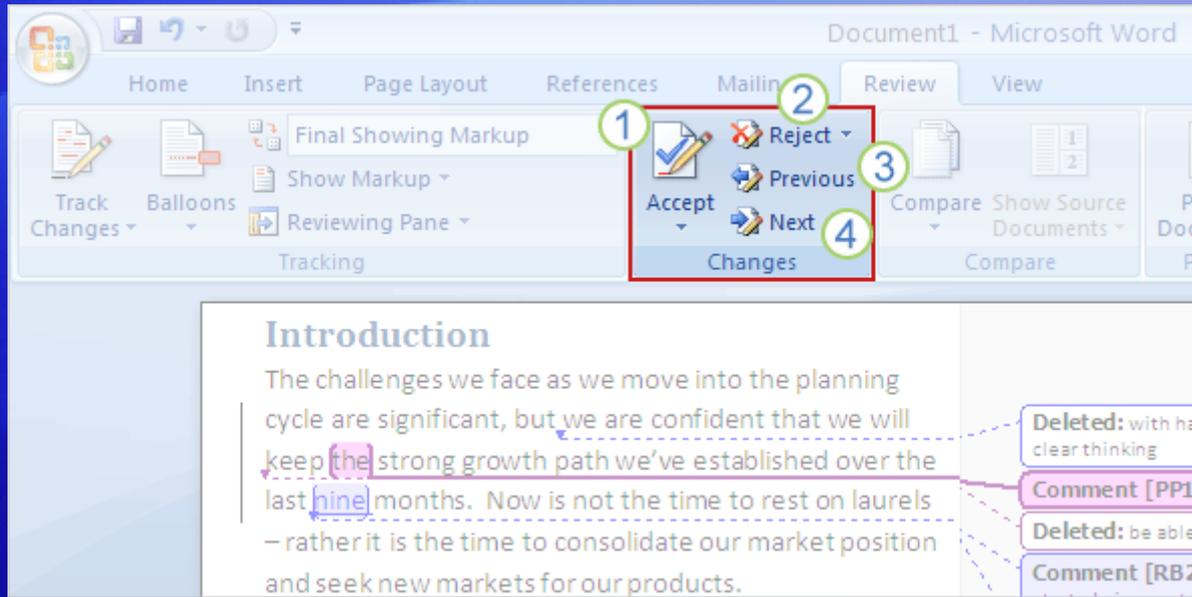
Accept or reject changes, and delete comments



When the revisions are done, someone must review them and then accept or reject them.

The reviewer can deal with revisions one at a time or all at once, and can read the comments and then delete them.

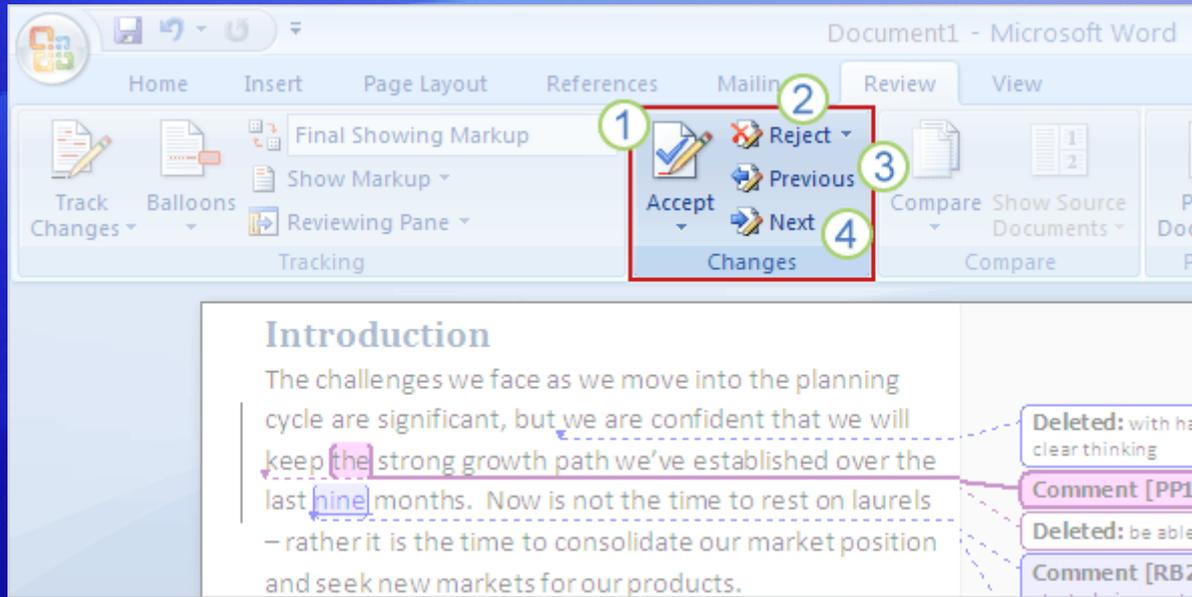
Accept or reject changes, and delete comments



The picture shows the options.

- 1 On the **Review** tab, in the **Changes** group, use the **Accept** button to accept changes one at a time or in sequence, or to accept all changes at once.
- 2 Use the **Reject** button to reject changes one at a time or in sequence, or to reject all changes at once.

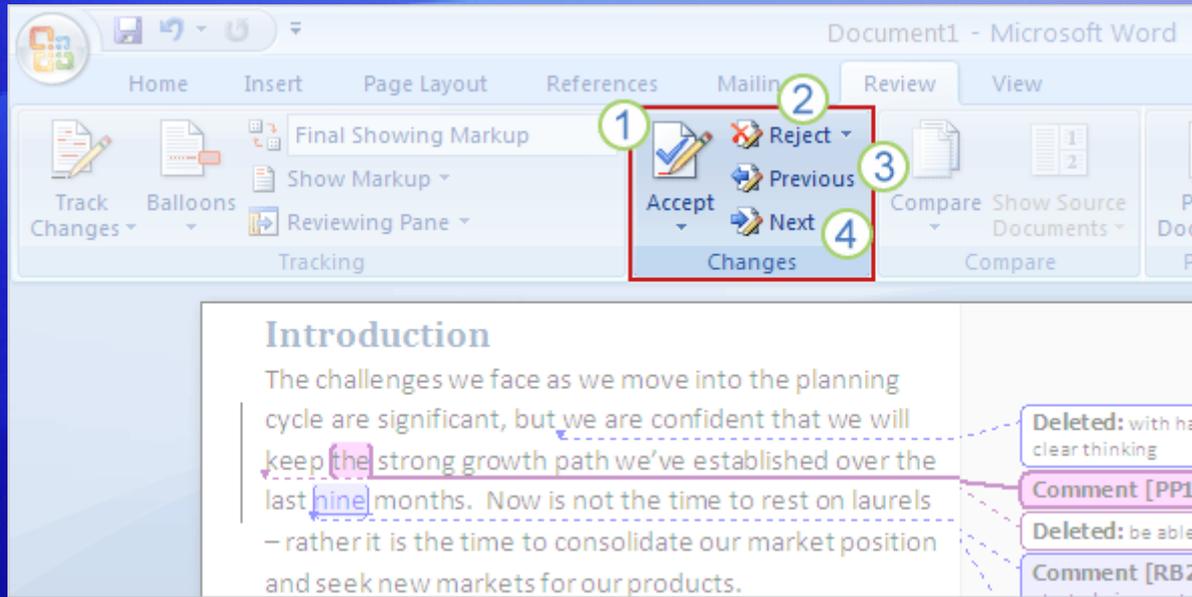
Accept or reject changes, and delete comments



The picture shows the options.

- 3 Use the **Previous** button to review each item going toward the beginning of the document.
- 4 Use the **Next** button to review each item going toward the end of the document.

Accept or reject changes, and delete comments



The picture shows the options.

If you want to accept and reject changes and delete comments all at once rather than one at a time, right-click in the document.

Suggestions for practice

1. Make changes.
2. Move text.
3. Insert comments.
4. Show revisions and comments in a different way.
5. Accept or reject changes and delete comments.

[Online practice](#) (requires Word 2007)

Test 1, question 1

To get rid of tracked changes, turn off Track Changes. (Pick one answer.)

1. True.
2. False.

Test 1, question 1: Answer

False.

Accept or reject tracked changes to get rid of them. And watch for that message at the end of the document telling you that there are no more tracked changes (or comments).

Test 1, question 2

What does turning off Track Changes do? (Pick one answer.)

1. Deletes tracked changes and comments.
2. Hides existing tracked changes and comments.
3. Stops tracking revisions.

Test 1, question 2: Answer

Stops tracking revisions.

Any revisions made after Track Changes is turned off will not be marked with strikethroughs or underlines, or in balloons. But any revisions already created remain in the document until you accept or reject them. And comments remain until you reject or delete them.

Test 1, question 3

To insert a comment, you have to turn on Track Changes.
(Pick one answer.)

1. True.
2. False.

Test 1, question 3: Answer

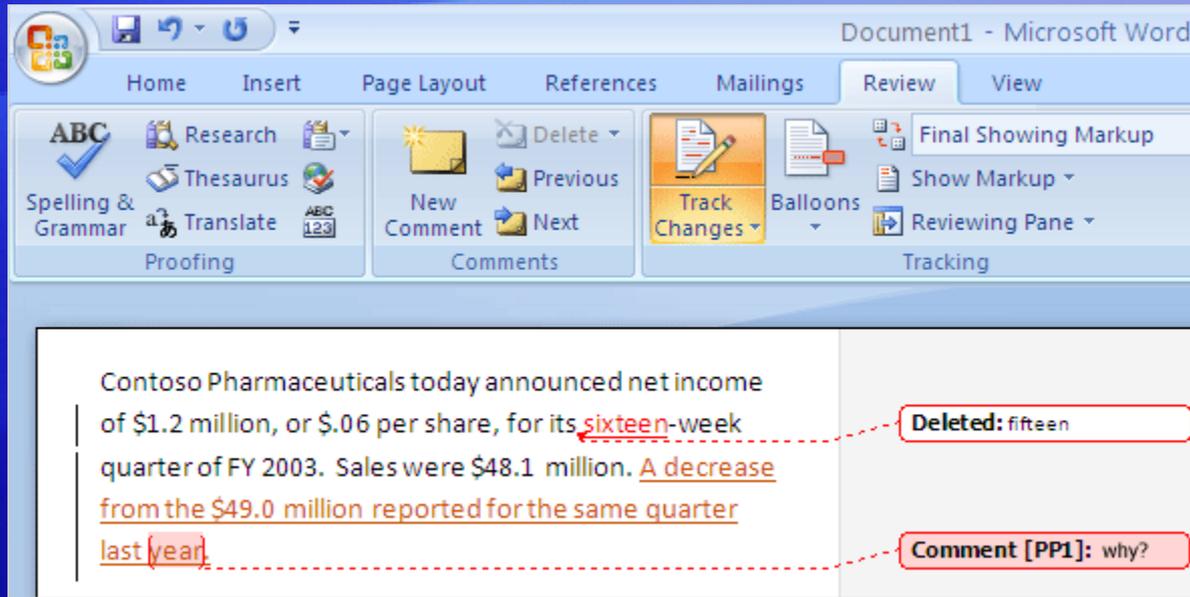
False.

Track Changes does not have to be turned on before you insert a comment. You can use comments at any time, not just when you work with tracked changes. On the **Review** tab, in the **Comments** group, click **New Comment**. You can also insert a comment by pressing CTRL+ALT+M.

Lesson 2

Track changes and comments:
Beyond the basics

Track changes and comments: Beyond the basics



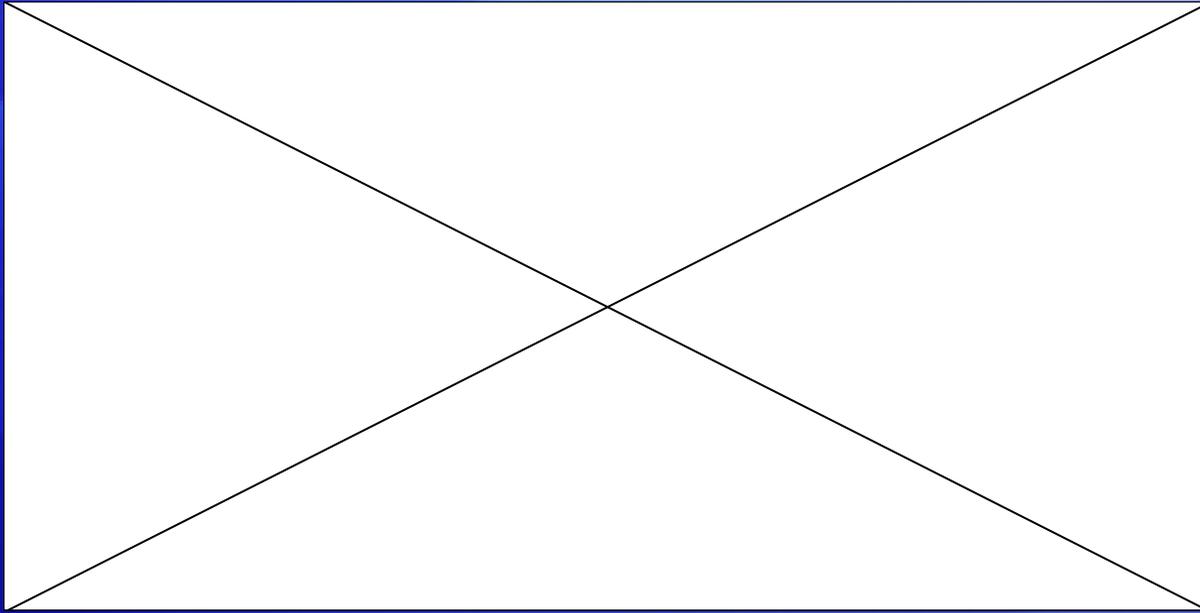
Imagine that you are about to review a document with changes made by Richard, Kai, and Pilar.

You'd like to see Pilar's revisions first. You know that you can see them by moving the pointer over all the changes to see her name or by looking for her markup color.

But you wonder if you can see just her changes, without having to sort through Richard's and Kai's too. This can be handy when working with long documents.

Revise documents with Track Changes
and Comments

Temporarily hide changes

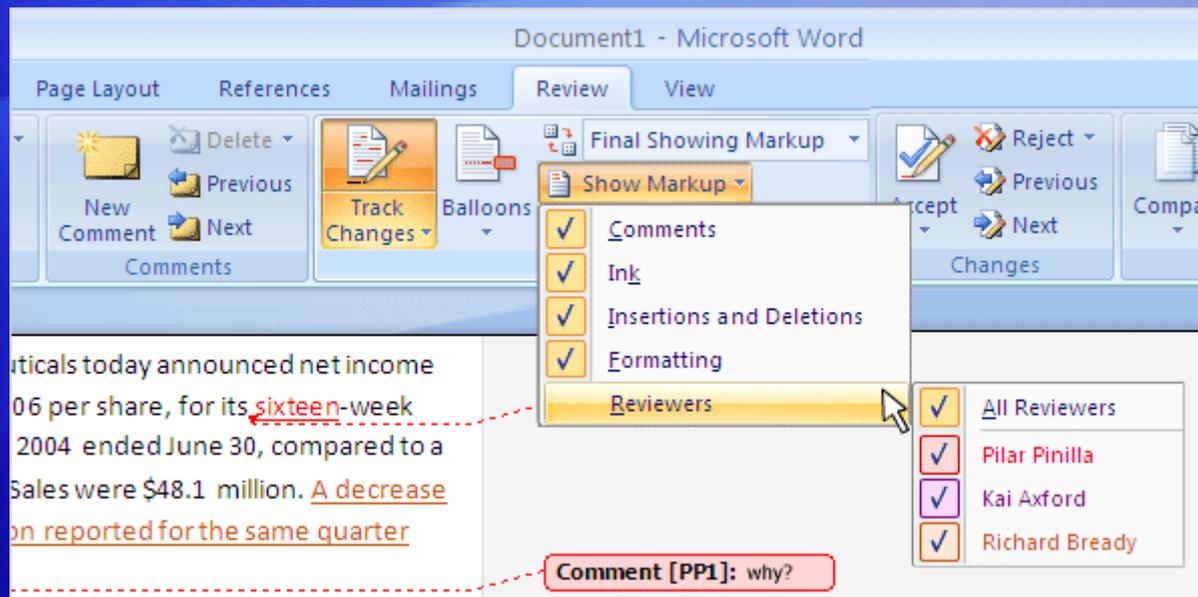


To see only Pilar's changes, you can *temporarily* hide the information you don't want to review right now (Richard's and Kai's revisions).

Animation: Right-click, and click **Play**.

On the **Review** tab, in the **Tracking** group, click the arrow next to **Show Markup**, point to **Reviewers**, and clear the check box next to **All Reviewers**. Then click the arrow next to **Show Markup** again, point to **Reviewers**, and click the check box next to Pilar's name to select it.

Temporarily hide changes

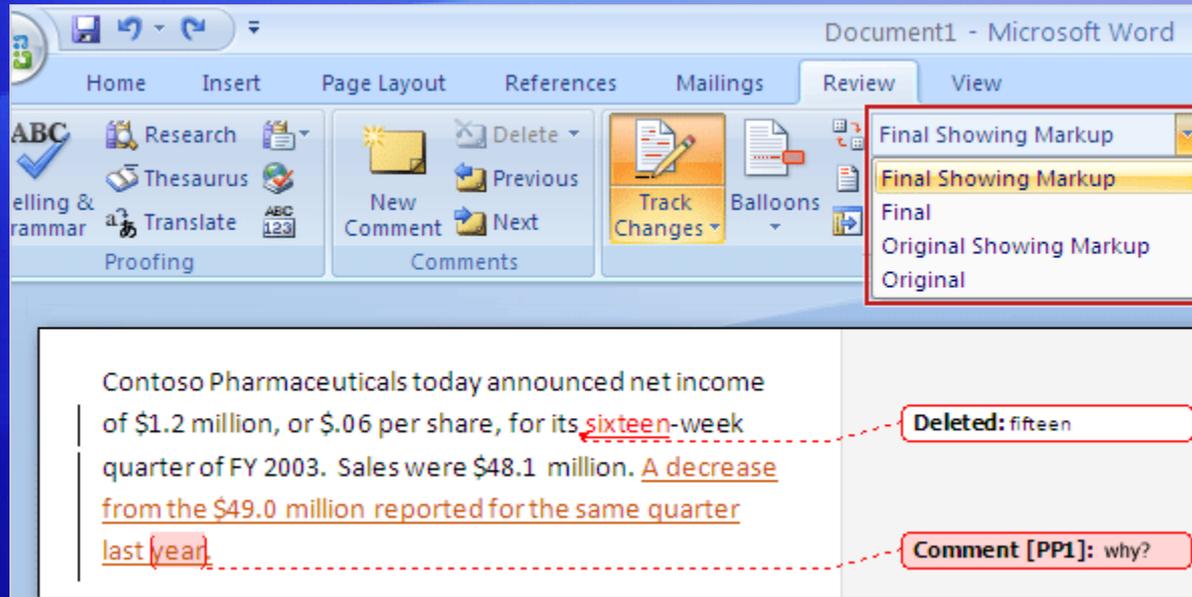


To see only Pilar's changes, you can *temporarily* hide the information you don't want to review right now (Richard's and Kai's revisions).

On the **Review** tab, in the **Tracking** group, click the arrow next to **Show Markup**, point to **Reviewers**, and clear the check box next to **All Reviewers**.

Then click the arrow next to **Show Markup** again, point to **Reviewers**, and click the check box next to Pilar's name to select it.

See a document before and after



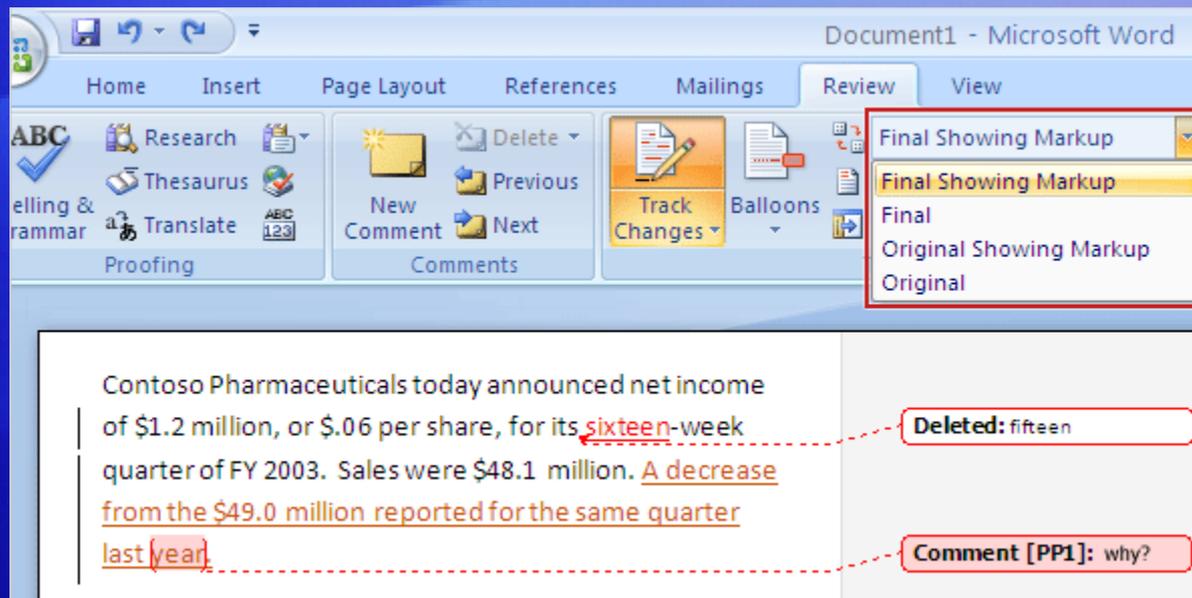
What did a marked-up document look like before it had all those revisions and changes? What it would look like if you accepted all changes and deleted all comments?

To help prevent you from inadvertently distributing documents with tracked changes and comments, Word automatically displays documents with markup showing.

On the **Review** tab, in the **Tracking** group, **Final Showing Markup** is the default option in the **Display for Review** box.

Revise documents with Track Changes
and Comments

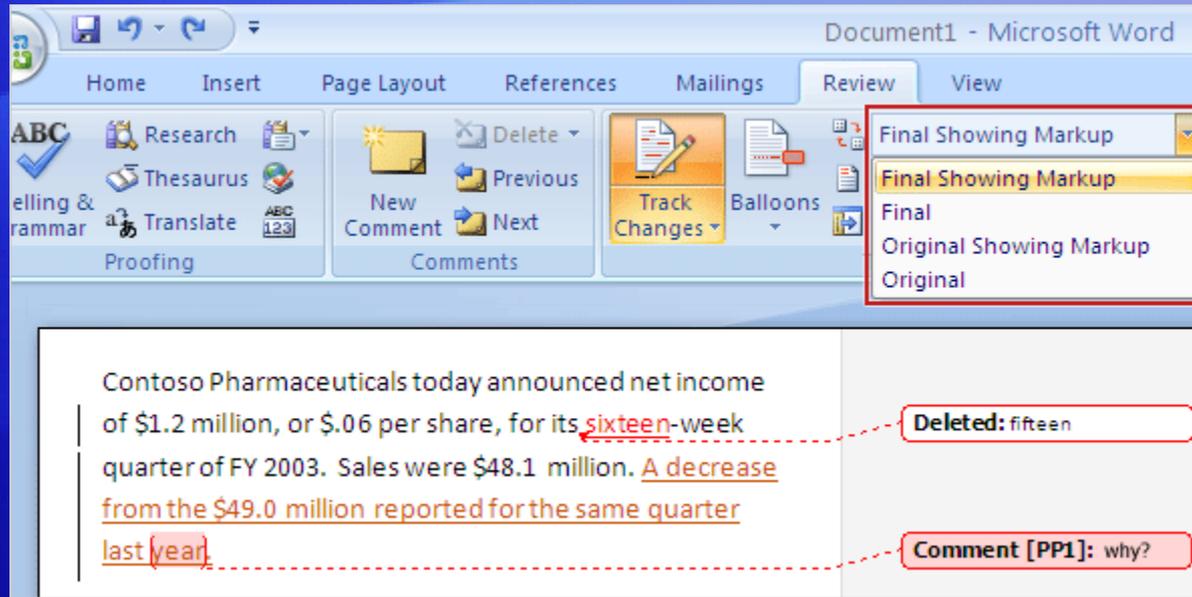
See a document before and after



What did a marked-up document look like before it had all those revisions and changes? What it would look like if you accepted all changes and deleted all comments?

To see how the document looked before tracked changes and comments were inserted, click the arrow in the **Display for Review** box, and then click **Original**.

See a document before and after



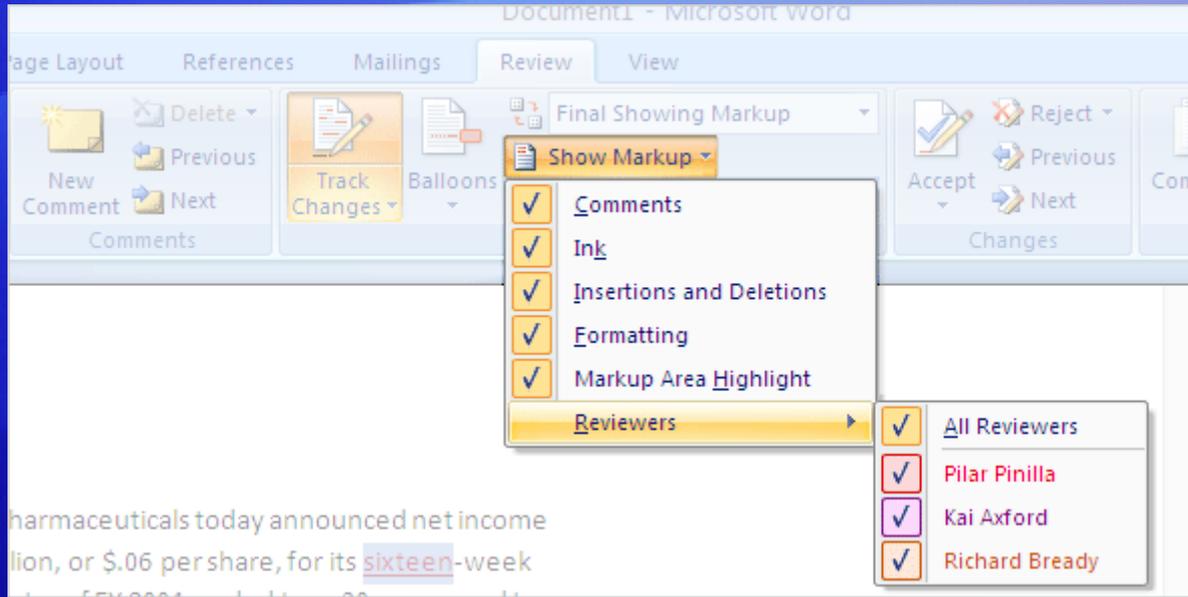
What did a marked-up document look like before it had all those revisions and changes? What it would look like if you accepted all changes and deleted all comments?

To see how the document would look with all revisions accepted and comments deleted, click the arrow in the **Display for Review** box, and then click **Final**.

After you review the document, click **Final Showing Markup** to display tracked changes and comments again.

Revise documents with Track Changes
and Comments

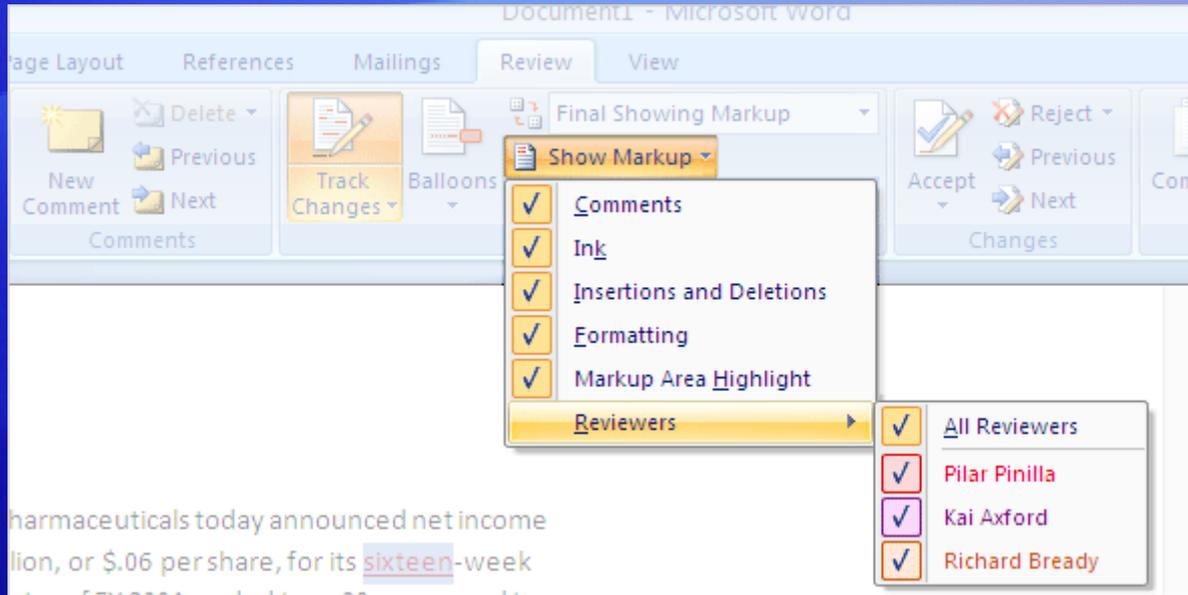
Hiding tracked changes doesn't mean deletion



As mentioned earlier, hiding tracked changes or comments doesn't delete markup. It just lets you see the document without underlines and balloons.

If you save and close a document with hidden markup, you (and maybe someone else, too) will see revisions and comments when the document is opened again.

Hiding tracked changes doesn't mean deletion

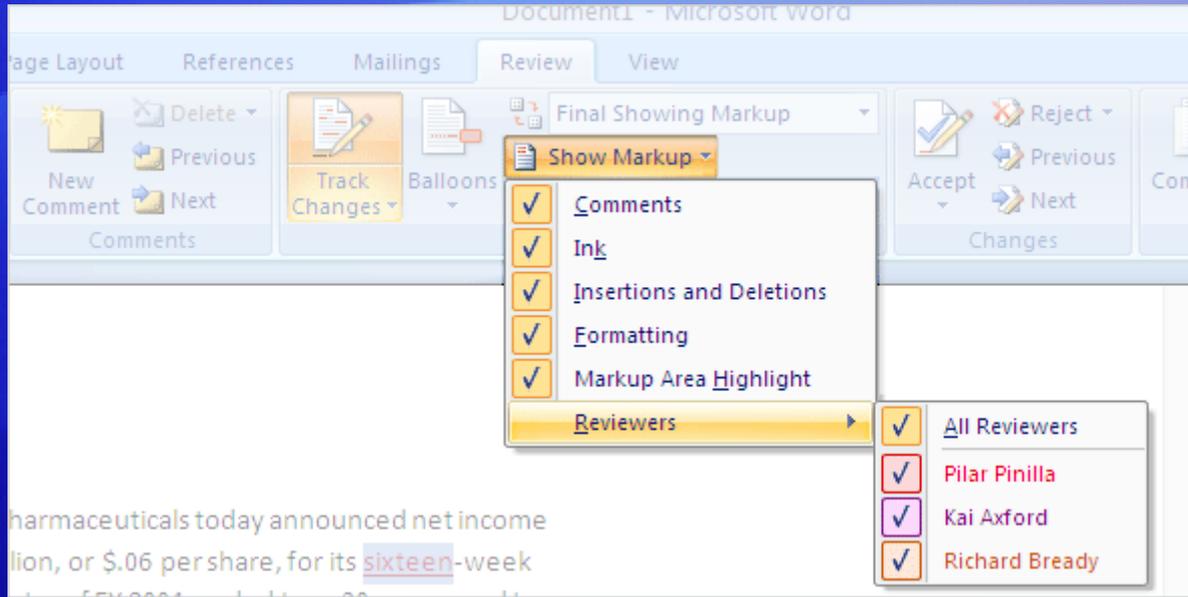


Here are some ways to see if a document contains hidden tracked changes or comments before you close it.

Doing this is especially important if you are about to distribute a document:

- On the **Review** tab, in the **Tracking** group, click **Show Markup**. Make sure there is a check mark next to **Comments**, **Ink** (for handwritten notes with a Tablet PC), **Insertions and Deletions**, and **Formatting**.

Hiding tracked changes doesn't mean deletion



Here are some ways to see if a document contains hidden tracked changes or comments before you close it.

Doing this is especially important if you are about to distribute a document:

- Point to **Reviewers** on the **Show Markup** menu, and be sure there is a check mark next to **All Reviewers**.

Check for revisions and comments



The only way to get rid of tracked changes is to accept or delete them. The only way to get rid of comments is to delete or reject them.

After you've checked to ensure that all revisions and comments are displayed, and before you distribute a document, do what the professionals do, automatically and every time.

Check for revisions and comments



The only way to get rid of tracked changes is to accept or delete them. The only way to get rid of comments is to delete or reject them.

- 1 On the **Review** tab, in the **Changes** group, use the buttons to look for revisions and comments from one end of the document to the other.

Remove any changes by accepting or rejecting them, and delete any comments.

Check for revisions and comments

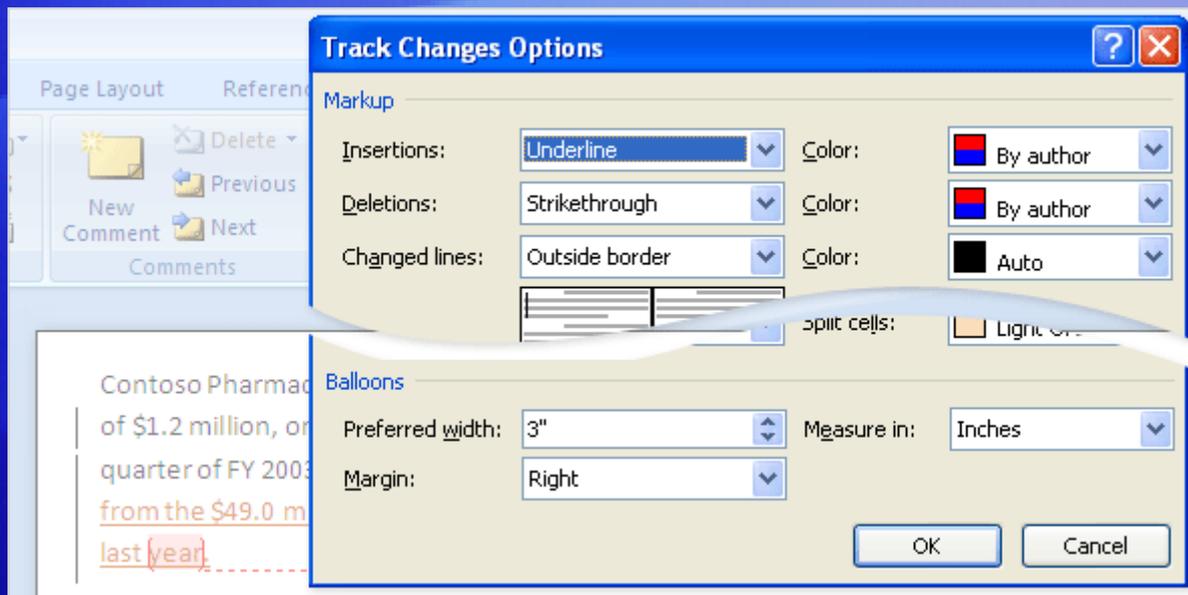


The only way to get rid of tracked changes is to accept or delete them. The only way to get rid of comments is to delete or reject them.

- 2 To see if a document contains hidden tracked changes or comments, click any button in the **Comments** or **Changes** group.

If you get the message shown here, click **Show All** to display revisions and comments.

Choose how you make tracks



Do you like to see comments and tracked changes but wish that you could change their look?

You have some options for how tracked changes and comments are displayed. On the **Review** tab, in the **Tracking** group, click the arrow on **Track Changes**. Then click **Change Tracking Options**.

As the picture shows, there's lots to choose from.

Suggestions for practice

1. Use the **Show Markup** menu to temporarily hide reviewer markup.
2. Track formatting revisions.
3. Use the **Show Markup** menu to hide revisions by type.
4. Look at different ways to verify that a document doesn't contain hidden markup.
5. Check out the tracked changes option.

[Online practice](#) (requires Word 2007)

Test 2, question 1

Clearing check boxes on the Show Markup menu does not delete changes. (Pick one answer.)

1. True.
2. False.

Test 2, question 1: Answer

True.

Clearing check boxes temporarily hides revisions and comments.
Clearing a check box never deletes changes.

Test 2, question 2

You have a document with insertions and deletions, formatting changes, and comments. To see just insertions and deletions, on the Show Markup menu, clear which of the following? (Pick one answer.)

1. The check box next to **Comments**.
2. The check boxes next to **Insertions** and **Deletions**.
3. The check boxes next to both **Comments** and **Formatting**.

Test 2, question 2: Answer

The check boxes next to both **Comments** and **Formatting**.

Clearing these two check boxes will hide comments and formatting revisions, leaving only insertions and deletions.

Test 2, question 3

What's the last thing you should do before you distribute a document? (Pick one answer.)

1. Check for spelling and grammar errors.
2. Save the document.
3. Check for revisions and comments.

Test 2, question 3: Answer

Check for revisions and comments.

Before you distribute a document, always check to see if there are any revisions or comments. As a last step, you can use the Document Inspector.

Quick Reference Card

For a summary of the tasks covered in this course, view the [Quick Reference Card](#).