Exam 77-881

Microsoft Word 2010

This part of the book covers the skills you need to have for certification as a Microsoft Office Specialist in Microsoft Word 2010. Specifically, you need to be able to complete tasks that demonstrate the following skill sets:

1 Sharing and Maintaining Documents
2 Formatting Content
3 Applying Page Layout and Reusable Content
4 Including Illustrations and Graphics in a Document
5 Proofreading Documents
6 Applying References and Hyperlinks
7 Performing Mail Merge Operations

With these skills, you can create and manage the documents most commonly used in a business environment.

Prerequisites

We assume that you have been working with Word 2010 for at least six months and that you know how to carry out fundamental tasks that are not specifically mentioned in the Microsoft Office Specialist objectives for Word 2010. Before you begin studying for this exam, you might want to make sure you are familiar with the information in this section.

Selecting Text

Before you can edit or format text, you need to select it. You can select any amount of text by dragging through it. You can select specific units of text as follows:

- To select a word, double-click it. The word and the space following it are selected. Punctuation following a word is not selected.
- To select a sentence, click anywhere in the sentence while holding down the Ctrl key. The first character in the sentence through the space following the ending punctuation mark are selected.
- To select a paragraph, triple-click it. The paragraph and paragraph mark are selected.

You can select adjacent words, lines, or paragraphs by positioning the cursor at the beginning of the text you want to select, holding down the Shift key, and then pressing an arrow key or clicking at the end of the text that you want to select.

To select non-adjacent blocks of text, select the first block, hold down the Ctrl key, and then select the next block.

To select a block of text quickly, you can use the selection area—the empty area to the left of the document's text column. When the pointer is in the selection area, it changes from an I-beam to a right-pointing arrow. From the selection area, you can select specific units of text as follows:

- To select a line, click in the selection area to the left of the line.
- To select a paragraph, double-click in the selection area to the left of the paragraph.
- To select an entire document, triple-click anywhere in the selection area.

To deselect text, click anywhere in the document window except the selection area.

Moving Around in a Document

You can view various parts of the active document by using the vertical and horizontal scroll bars. Scrolling the document does not move the cursor—it changes only the part of the document displayed in the window. For example, if you drag the vertical scroll box down to the bottom of the scroll bar, the end of the document comes into view, but the cursor stays in its original location.

Here are some other ways to use the scroll bars:

- Click the up or down scroll arrow on the vertical scroll bar to move the document window up or down one line of text.
- Click above or below the scroll box to move up or down one windowful.
- Click the left or right scroll arrow on the horizontal scroll bar to move the document window to the left or right several characters at a time.
- Click to the left or right of the scroll box to move left or right one windowful.

You can also move around in a document by moving the cursor. You can click to place the cursor at a particular location, or you can press a key or a key combination to move the cursor.

The following table shows the keys and key combinations you can use to move the cursor quickly.

Pressing this key or combination	Moves the cursor
Left Arrow	Left one character at a time
Right Arrow	Right one character at a time
Down Arrow	Down one line at a time
Up Arrow	Up one line at a time
Ctrl+Left Arrow	Left one word at a time
Ctrl+Right Arrow	Right one word at a time
Home	To the beginning of the current line
End	To the end of the current line
Ctrl+Home	To the beginning of the document
Ctrl+End	To the end of the document
Ctrl+Page Up	To the beginning of the previous page
Ctrl+Page Down	To the beginning of the next page
Page Up	Up one screen
Page Down	Down one screen

1 Sharing and Maintaining Documents

The skills tested in this section of the Microsoft Office Specialist exam for Microsoft Word 2010 relate to viewing and managing documents. Specifically, the following objectives are associated with this set of skills:

1.1 Apply Different Views to a Document
1.2 Apply Protection to a Document
1.3 Manage Document Versions
1.4 Share Documents
1.5 Save a Document
1.6 Apply a Template to a Document

Word provides many tools with which to manage the way you work with documents and share documents with other people.

This chapter guides you in studying ways of viewing documents, preventing unwanted changes, working with document versions, sharing documents with other people, saving documents, and changing the appearance of a document by applying a template.

> **Practice Files** Before you can complete the practice tasks in this chapter, you need to copy the book's practice files to your computer. The practice files you'll use to complete the tasks in this chapter are in the Word\Objective1 practice file folder. A complete list of practice files is provided in "Using the Book's Companion Content" at the beginning of this book.

1.1 Apply Different Views to a Document

Switching Views

In Word, you can display a document in a variety of views, each suited to a specific purpose. The standard views include Print Layout view (the default), Full Screen Reading view, Web Layout view, Outline view, and Draft view.

➤ **To switch views**

➜ On the **View** tab, in the **Document Views** group, click the **Print Layout**, **Full Screen Reading**, **Web Layout**, **Outline View**, or **Draft View** button.

➜ In the lower-right corner of the program window, on the **View Shortcuts** toolbar, click the **Print Layout**, **Full Screen Reading**, **Web Layout**, **Outline**, or **Draft** button.

See Also For more information about the View Shortcuts toolbar, see the "Magnifying Document Content" topic later in this section.

Working in Print Layout View

Print Layout view displays a document on the screen the way it will look when printed. You can see elements such as margins, page breaks, headers and footers, and watermarks.

➤ **To hide or display space between pages in Print Layout view**

➜ Point to the gap or line between any two pages, and when the pointer changes to two opposing arrows, double-click the mouse button.

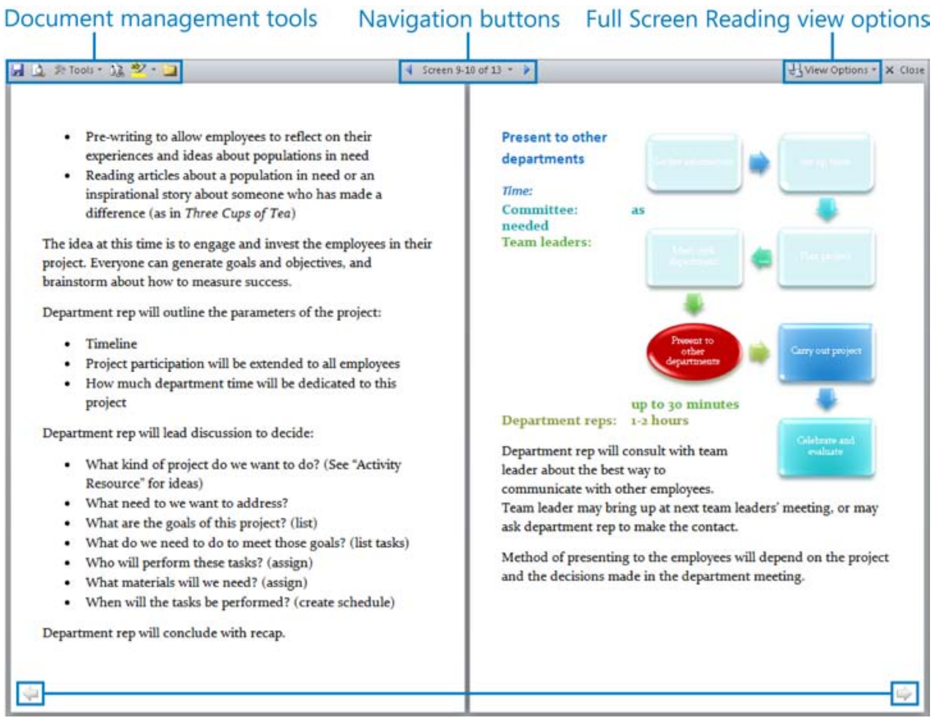
➜ On the **Display** page of the **Word Options** dialog box, in the **Page display options** section, clear or select the **Show white space between pages in Print Layout view** check box.

➤ **To display page thumbnails**

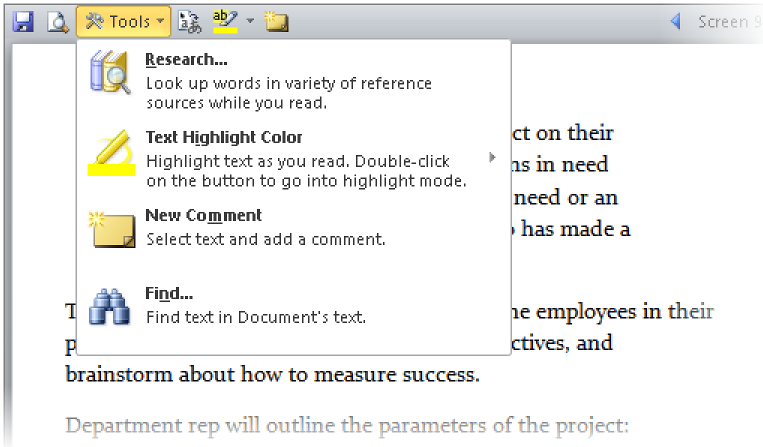
1. On the **View** tab, in the **Show** group, select the **Navigation Pane** check box.
2. In the **Navigation Pane**, click the **Browse Pages** tab.

Working in Full Screen Reading View

Full Screen Reading view displays a magnified view of the document content. In this view, the ribbon is replaced by one toolbar at the top of the screen with buttons for saving and printing the document, accessing reference and other tools, translating text, highlighting text, and inserting comments.

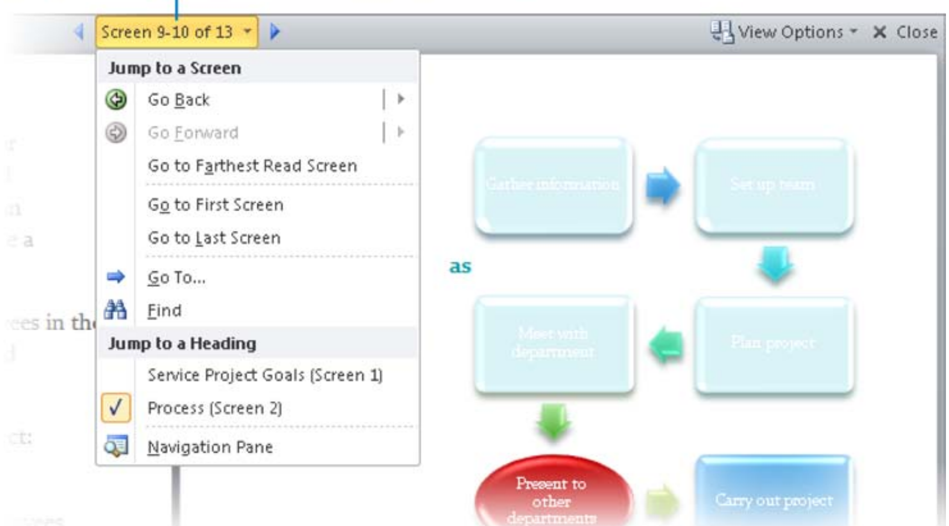


While working in Full Screen Reading view, you can save, preview, and print the document; translate content; and highlight or comment on content, by using the document management tools located at the left end of the title bar. In addition, you can access research tools, highlight and comment on document content, and search for specific text by using the commands on the Tools menu.

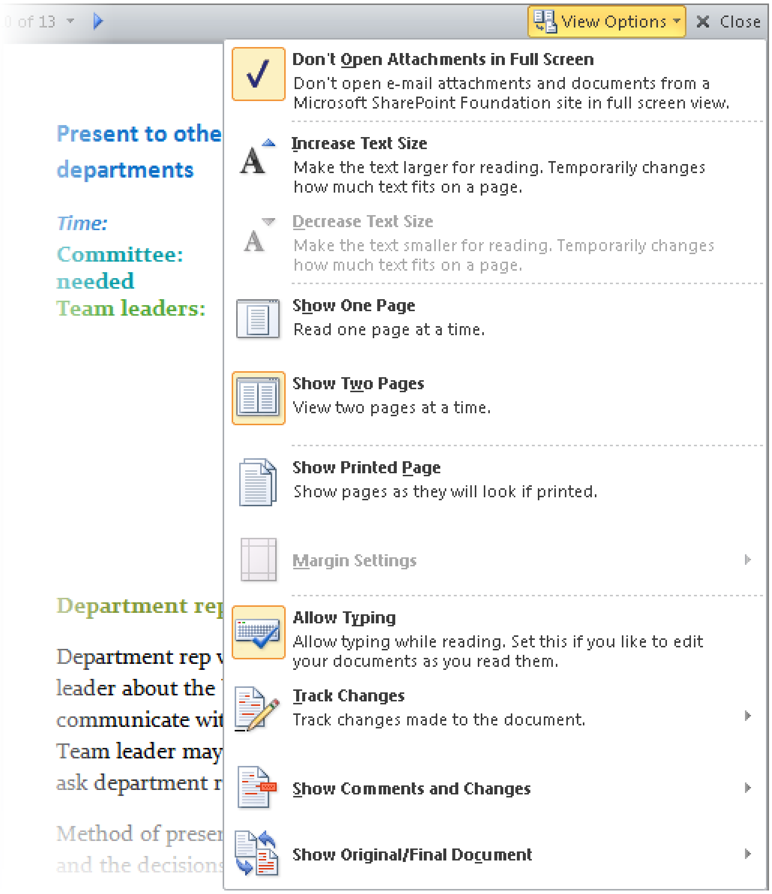


You can navigate from page to page or jump to a specific screen or heading within the document by using the buttons available in the navigation tools area in the center of the title bar.

Jump To A Page Or Section In The Document button



You can control the appearance of the document and the functionality within the document by using commands available from the View Options menu.



➤ **To move from page to page in Full Screen Reading view**

- ➜ Click the **Next Screen** or **Previous Screen** button in the center of the title bar.
- ➜ Click the arrows located on the outer edges at the bottom of the pages.

➤ **To move to a specific location in the document in Full Screen Reading view**

- ➜ Click the **Jump to a page or section in the document** button, and then click the screen or heading you want to move to.

➤ **To change the way content is displayed in Full Screen Reading view**

- ➜ On the **View Options** menu, do any of the following:
  - Click **Don't Open Attachments in Full Screen** to prevent email attachments and documents from a Microsoft SharePoint site from opening in Full Screen Reading view.
  - Click **Increase Text Size**, **Decrease Text Size**, **Margin Settings**, or **Show Printed Page** to change the amount of text shown on each page.
  - Click **Show One Page** or **Show Two Pages** to change the number and width of pages shown in the Full Screen Reading window.
  - Click **Allow Typing** to allow or prevent editing, and **Track Changes** to track changes made to the document while editing is allowed.
  - Click **Show Comments and Changes** or **Show Original/Final Document** to manage the display of tracked changes and comments.

➤ **To switch from Full Screen Reading view to the previous view**

- ➜ Click the **Close full screen reading view** button.

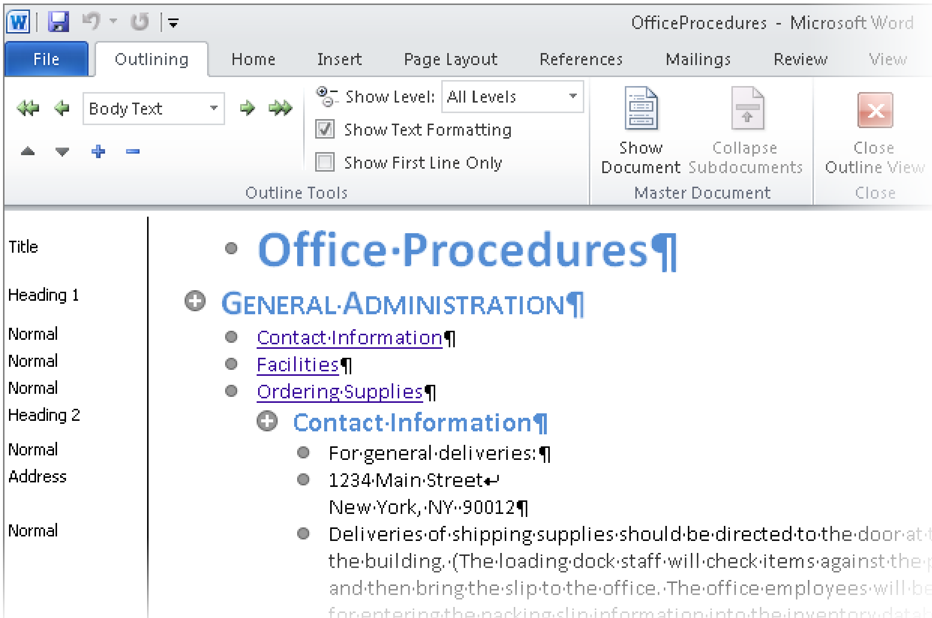
Working in Web Layout View

Web Layout view displays the document the way it will look when viewed in a web browser. In this view, you can see backgrounds and other effects. You can also see how text wraps to fit the window and how graphics are positioned.

See Also For information about the ribbon, see "Modifying the Display of the Ribbon" at the beginning of this book.

Working in Outline View

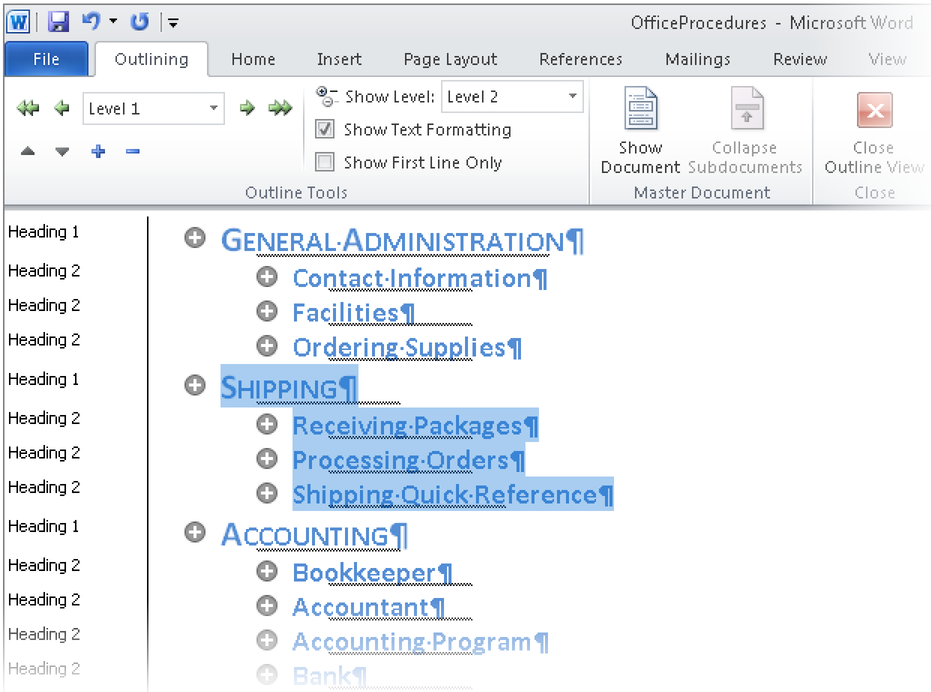
Outline view displays the structure of a document as nested levels of headings and body text, and provides tools for viewing and changing its hierarchy.



The indentations and symbols used in Outline view to indicate the level of a heading or paragraph in the document's structure don't appear in the document in other views or when you print it. To the left of the document text, the style area pane shows the style applied to each paragraph. This pane is available only in Draft and Outline views, and it is not visible by default.

> **Tip** By default, the style area pane is 0 inches wide, which effectively closes it. You may find it useful to work in Outline view with the style area pane open.

When working in Outline view, you can control the level of content that is displayed, promote or demote the level of headings or body text, and easily move entire sections of text. You can also work with the subdocuments of a master document.



➤ To display or hide styles in the margin in Outline view

➜ On the **Advanced** page of the **Word Options** dialog box, in the **Display** section, do one of the following, and then click **OK**:

- To display styles, enter a positive dimension (for example, ***0.5***") in the **Style area pane width in Draft and Outline views** box.
- To hide styles, enter ***0***" in the **Style area pane width in Draft and Outline views** box.

➤ To display only content at a specific level and above in Outline view

➜ On the **Outlining** tab, in the **Outline Tools** group, in the **Show Level** list, click the lowest content level you want to display.

➤ **To expand and collapse sections in Outline view**

- ➜ Double-click the plus sign to the left of the section.
- ➜ Select or click in the section. Then on the **Outlining** tab, in the **Outline Tools** group, click the **Expand** button or the **Collapse** button.

➤ **To reorganize a document in Outline view**

- ➜ Click the plus sign to the left of any heading to select that section of the document. Then do any of the following:
  - ❍ Drag the section to its new location.
  - ❍ Cut and paste the section to its new location.
  - ❍ Select or click in the section. Then on the **Outlining** tab, in the **Outline Tools** group, click the **Move Up** button or the **Move Down** button.

➤ **To promote or demote sections in Outline view**

- ➜ Select or click in the section you want to promote or demote.
- ➜ On the **Outlining** tab, in the **Outline Tools** group, do one of the following:
  - ❍ Click the **Promote** button to promote the section one level.
  - ❍ Click the **Demote** button to demote the section one level.
  - ❍ Click the **Promote to Heading 1** button to promote the section to a first-level heading.
  - ❍ Click the **Demote to Body Text** button to demote a heading to body text.

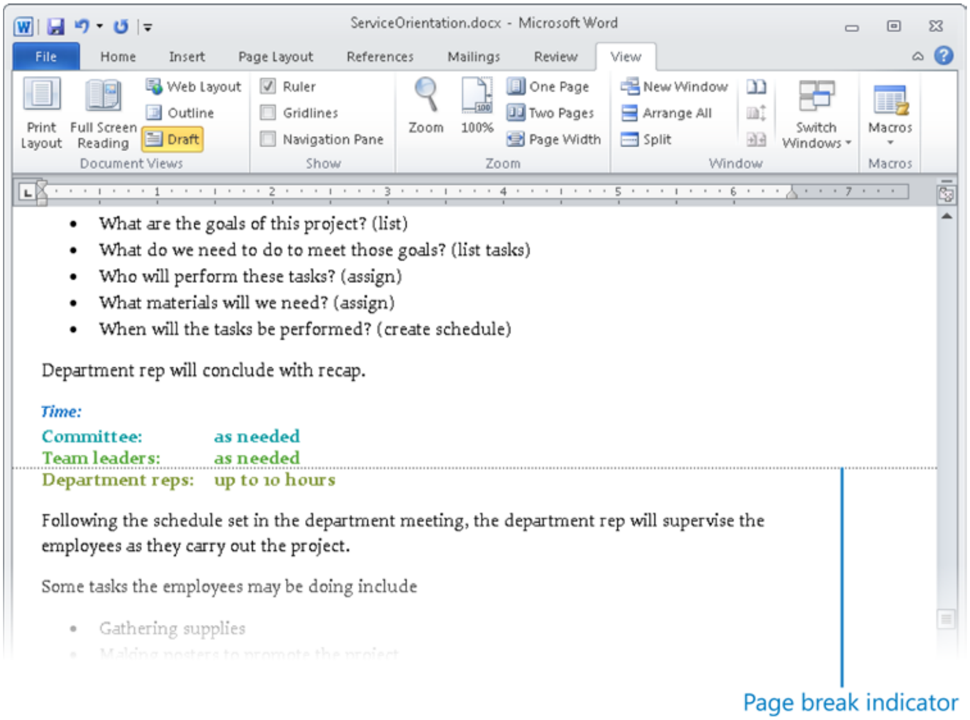
➤ **To expand and collapse subdocuments in Outline view**

- ➜ Select or click in the subdocument. Then on the **Outlining** tab, in the **Master Document** group, click the **Expand Subdocuments** button or the **Collapse Subdocuments** button.

➤ **To open a subdocument from Outline view**

- ➜ On the **Outlining** tab, in the **Master Document** group, click the **Show Document** button.

Working in Draft View



Draft view displays the content of a document with a simplified layout so that you can type and edit quickly. You cannot see layout elements such as headers and footers.

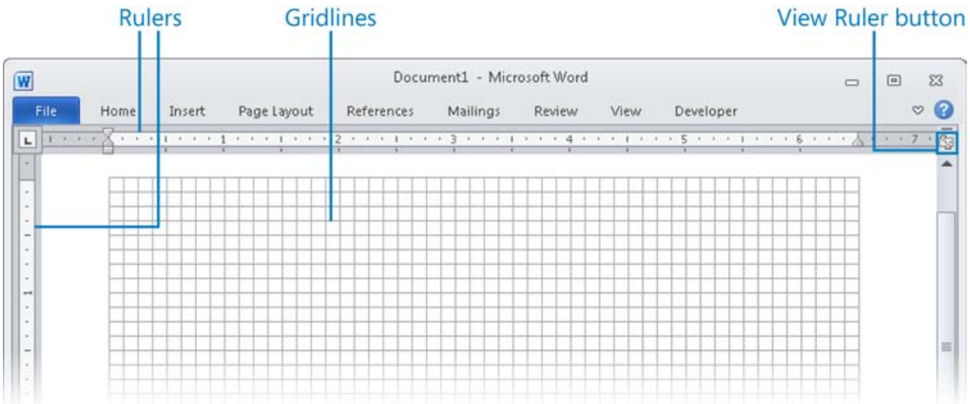
➤ To display or hide styles in the margin in Draft view

➜ On the **Advanced** page of the **Word Options** dialog box, in the **Display** section, do one of the following, and then click **OK**:

- To display styles, enter a positive dimension (for example, ***0.5*"**) in the **Style area pane width in Draft and Outline views** box.
- To hide styles, enter ***0*"** in the **Style area pane width in Draft and Outline views** box.

Modifying the Program Window

When you want to focus on the layout of a document, you can display horizontal and vertical rulers and gridlines to help you position and align elements.



When you are fine-tuning the layout of a document, you might find it helpful to display formatting marks and hidden characters. Formatting marks, such as tabs and paragraph marks, control the layout of your document, and hidden characters provide the structure for behind-the-scenes processes, such as indexing.

➤ To display or hide rulers

- ➜ At the top of the vertical scrollbar, click the **View Ruler** button.
- ➜ On the **View** tab, in the **Show** group, select or clear the **Ruler** check box.

➤ To turn the display of the vertical ruler on or off

- ➜ On the **Advanced** page of the **Word Options** dialog box, in the **Display** section, select or clear the **Show vertical ruler in Print Layout view** check box.

➤ To display or hide gridlines

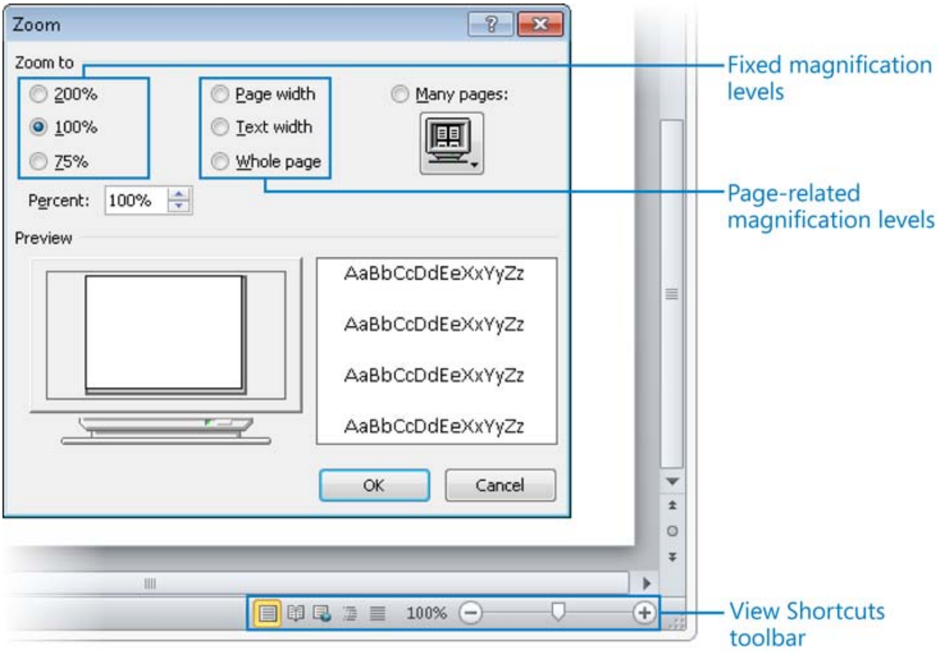
- ➜ On the **View** tab, in the **Show** group, select or clear the **Gridlines** check box.

➤ To display or hide formatting marks and hidden characters

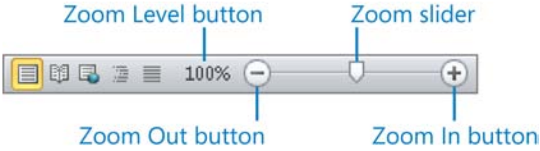
- ➜ On the **Home** tab, in the **Paragraph** group, click the **Show/Hide ¶** button.

Magnifying Document Content

You can adjust the magnification of the document by using the tools available from the ribbon or from the View Shortcuts toolbar located at the right end of the status bar.



The View Shortcuts toolbar includes tools for changing the view and the magnification of the document window.



See Also For information about changing the view, see the "Switching Views" topic earlier in this section.

➤ **To zoom in or out in 10 percent increments**

➜ On the **View Shortcuts** toolbar, click the **Zoom In** button or the **Zoom Out** button.

➤ **To zoom to a specific magnification**

➜ On the **View Shortcuts** toolbar, drag the **Zoom** slider.

➜ On the **View** tab, in the **Zoom** group, click the **100%**, **One Page**, **Two Pages**, or **Page Width** button.

Or

1. On the **View Shortcuts** toolbar, click the **Zoom level** button.

   Or

   On the **View** tab, in the **Zoom** group, click the **Zoom** button.
2. In the **Zoom** dialog box, click a fixed magnification level or a page-related magnification level, or in the **Percent** box, enter or select a magnification level. Then click **OK**

➤ **To display multiple pages**

➜ On the **View** tab, in the **Zoom** group, click the **Two Pages** button.

Or

1. On the **View Shortcuts** toolbar, click the **Zoom level** button.

   Or

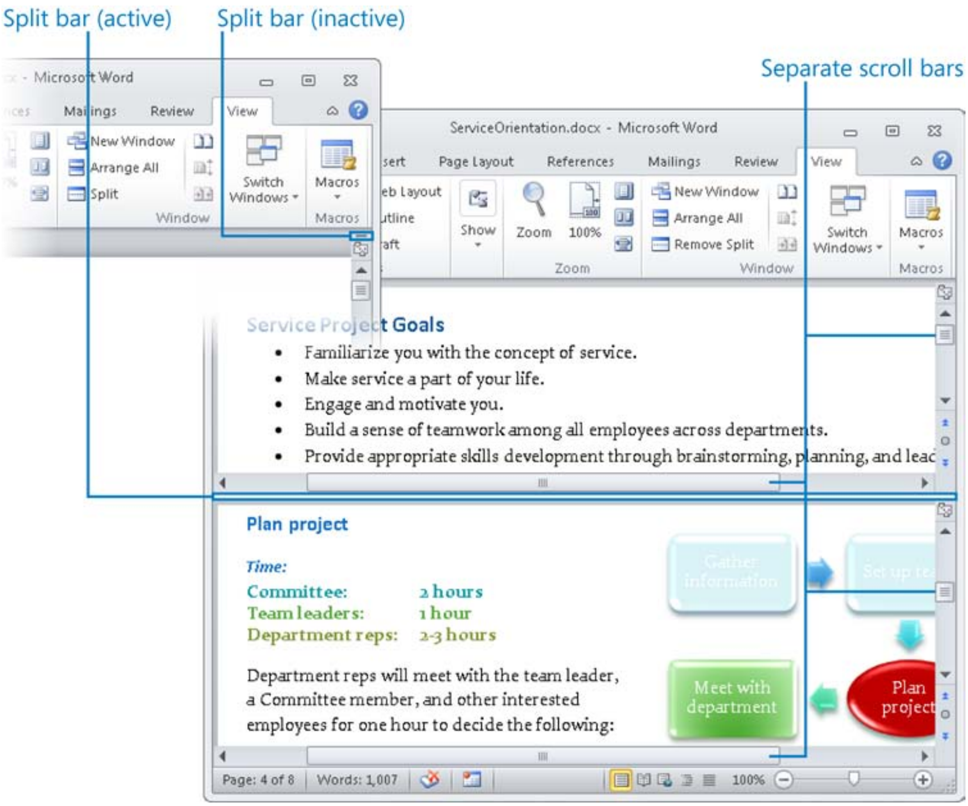
   On the **View** tab, in the **Zoom** group, click the **Zoom** button.
2. In the **Zoom** dialog box, click the **Many pages** button, and select the number of pages across and down that you want to display. Then click **OK**.

> **Tip You can select up to 2 pages down and 4 pages across by pointing to that configuration on the default Many Pages grid. You can select up to 5 pages down and 11 pages across by dragging through the grid.**

Splitting a Document Window

It can be cumbersome to work in a long document that requires you to frequently scroll up and down to view data elsewhere in the document.

In any view other than Full Screen Reading view, you can view multiple parts of a document at one time by splitting the window. You can then independently scroll and work in two views of the document at one time. Each part of the split window has its own ruler; commands on the ribbon apply to the active content in either part of the split window or to the entire document shown in both parts of the split window.



➤ To split the window

➜ Drag the split bar from the top of the vertical scroll bar to the location where you want to split the window.

> **Tip** You can change the program window area allocated to each split pane by dragging the split bar up or down.

➜ On the **View** tab, in the **Window** group, click the **Split** button. Then click in the location where you want to split the window.

➤ To remove a split

➜ Double-click the split bar that divides the pane.

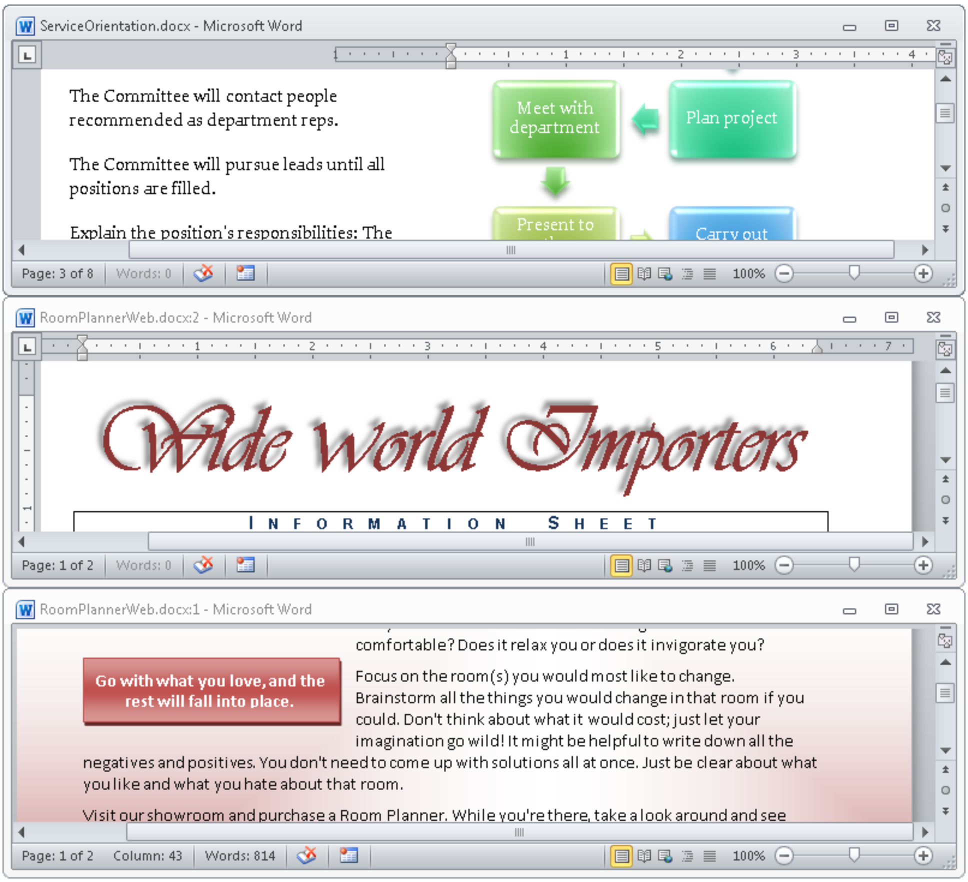
➜ Drag the split bar to its original location at the top of the scroll bar.

➜ On the **View** tab, in the **Window** group, click the **Remove Split** button.

Displaying Multiple Program Windows

You can open multiple documents in independent windows, and you can open multiple windows that display the same document.

You can display two windows side by side so that you can see the contents of both simultaneously. When you display windows side by side, Word automatically turns on synchronous scrolling, so that scrolling one window also scrolls the other. You can also stack two or more windows on top of each other. When more than two windows are stacked, the ribbon is hidden automatically. When only two windows are stacked, you can manually minimize the ribbon to display only the tab names and occupy less screen space.



➤ **To open a second instance of a document in a separate window**

➜ On the **View** tab, in the **Window** group, click the **New Window** button.

➤ **To stack multiple program windows**

➜ In the **Window** group, click the **Arrange All** button.

➤ **To restore stacked program windows**

➜ Maximize each program window.

➤ **To display two program windows side by side**

1. In the **Window** group, click the **View Side by Side** button.
2. If more than two documents are open, in the **Compare Side by Side** dialog box, click the document you want to display side by side with the current document.

➤ **To turn synchronous scrolling on or off**

1. Display two program windows by using the **View Side by Side** command.
2. In the **Window** group, click the **Synchronous Scrolling** button.

➤ **To restore side-by-side program windows to their original size**

➜ In the **Window** group, click the **View Side by Side** button.

➤ **To switch between multiple program windows**

➜ If the window is visible on the screen, click anywhere in the window.

➜ Click the Windows Taskbar button representing the window you want to make active.

➜ In the **Window** group, click the **Switch Windows** button, and then click the window you want to make active.

Practice Tasks

The practice files for these tasks are located in the Word\Objective1 practice file folder.

- Open the *Viewing1* document, and change the magnification so that you can see two pages side by side. Then zoom to 100%, and jump to the *Shipping* heading. Finally, jump to the top of page 5.
- Open the *Viewing1* and *Viewing2* documents, and switch back and forth between the two open windows. Then arrange the two document windows so that they are stacked one above the other.
- Open the *Viewing2* document, and arrange the screen so that you can see the beginning and end of the document at the same time.

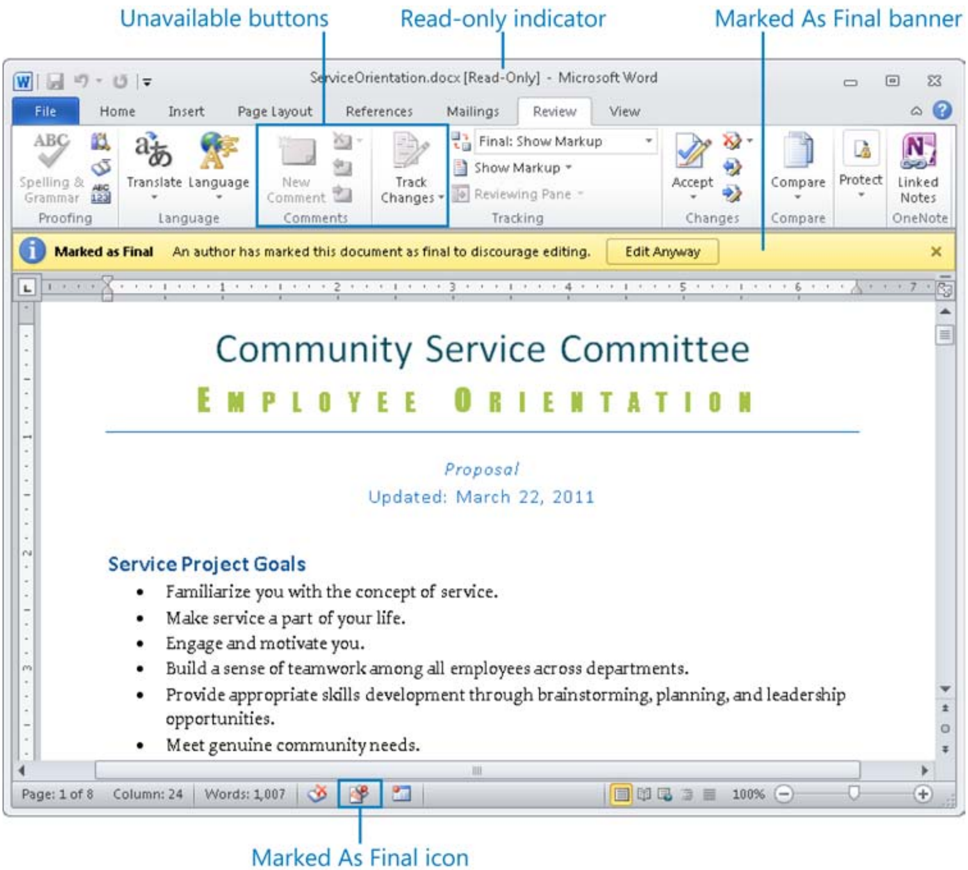
1.2 Apply Protection to a Document

Marking a Document as Final

Before you distribute a document to other people, you can mark it as final to prevent anyone from making changes to it. Marking a document as final has the following results:

- The document is changed to read-only, and some buttons on the ribbon are unavailable.
- A Marked As Final banner appears at the top of the document.
- A Permissions flag on the Info page of the Backstage view indicates that the document has been marked as final.
- A Marked As Final Icon appears on the status bar.

Further changes cannot be made to the document by you or anyone else without first removing the Marked As Final designation.



➤ To mark a document as final

1. On the **Info** page of the Backstage view, click the **Protect Document** button, and then click **Mark as Final**.
2. In the **Microsoft Word** dialog box, click **OK** to acknowledge that the file will be marked as final and saved.
3. If a **Microsoft Word** message box informing you that the document has been marked as final appears, click **OK**.

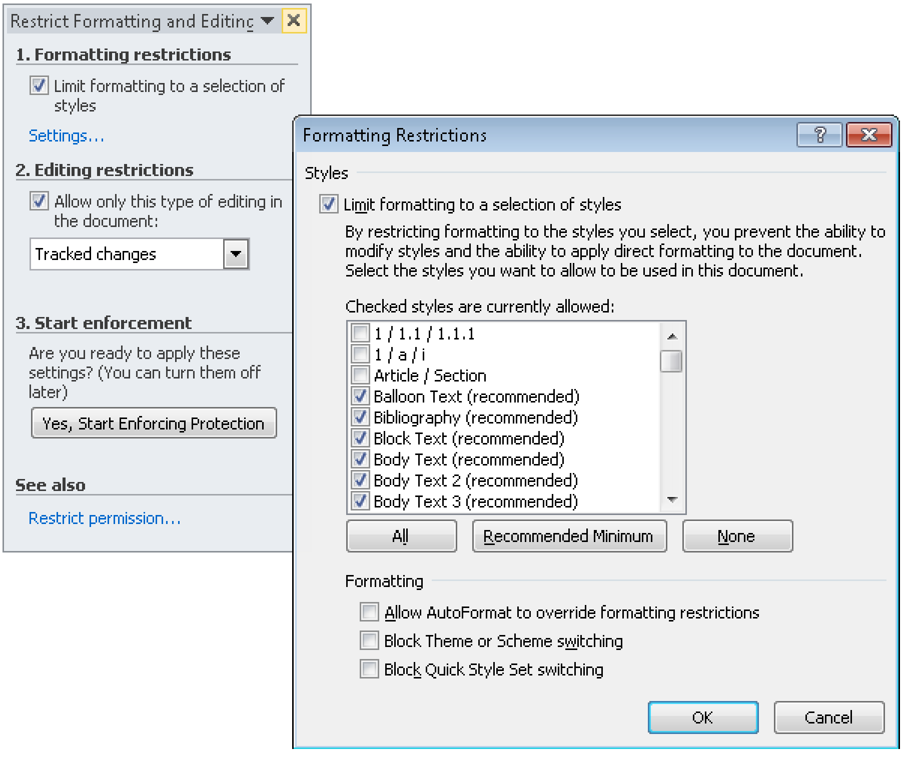
> **Tip** You can select the Don't Show This Message Again check box to prevent the message box from appearing when you mark documents as final in the future.

➤ To remove the Marked As Final designation

- ➜ On the **Marked as Final** banner at the top of the document, click **Edit Anyway**.
- ➜ On the **Info** page of the Backstage view, click the **Protect Document** button, and then click **Mark as Final**.

Restricting Formatting and Editing Changes

To prevent anyone from introducing inconsistent formatting into a document, you can limit the styles that can be applied. You can select the styles individually, or you can implement the recommended minimum set, which consists of all the styles needed by Word for features such as tables of contents. (The recommended minimum set doesn't necessarily include all the styles used in the document.)



You can also restrict the ways users can edit a document.

➤ To restrict formatting changes

1. On the **Review** tab, in the **Protect** group, click the **Restrict Editing** button.

   Or

   On the **Info** page of the Backstage view, click the **Protect Document** button, and then click **Restrict Editing**.
2. In the **Restrict Formatting and Editing** task pane, in the **Formatting restrictions** section, select the **Limit formatting to a selection of styles** check box, and then click **Settings**.
3. In the **Formatting Restrictions** dialog box, do one of the following, and then click **OK**:
   - Clear the check boxes of the styles that you will not allow in the document.
   - Click **None**, and then select the check boxes of the styles that you will allow in the document.
4. In the **Start enforcement** section of the **Restrict Formatting and Editing** task pane, click **Yes, Start Enforcing Protection**.
5. In the **Start Enforcing Protection** dialog box, if you want to require a password to use styles other than those you selected, enter a password in the **Enter new password** and **Reenter password to confirm** boxes. Then click **OK**.

➤ To restrict editing

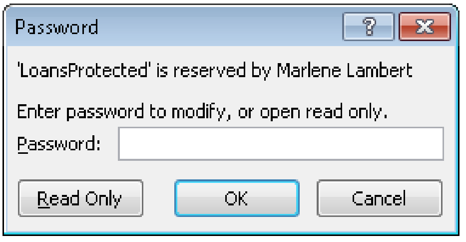
1. In the **Restrict Formatting and Editing** pane, in the **Editing restrictions** section, select the **Allow only this type of editing in the document** check box.
2. In the **Allow only...** list, do one of the following:
   - To force all changes to be tracked, click **Tracked changes**.
   - To disable all changes other than commenting, click **Comments**.
   - To disable changes outside of form fields, click **Filling in forms**.
3. In the **Start enforcement** section of the **Restrict Formatting and Editing** task pane, click **Yes, Start Enforcing Protection**.

➤ To remove formatting and editing restrictions

1. In the **Restrict Formatting and Editing** pane, click **Stop Protection**.
2. If the **Unprotect Document** dialog box opens, enter the assigned password, and then click **OK**.

Restricting Document Access

If you want only certain people to be able to open and change a document, you can assign a password to protect the document. Word then requires that the password be entered correctly before the document can be opened and changed.



Word offers two levels of password protection:

- **Unencrypted** The document is saved in such a way that only people who know the password can open it, make changes, and save the file. People who don't know the password can open a read-only version. If they make changes and want to save them, they have to save the document with a different name or in a different location, preserving the original.
- **Encrypted** The document is saved in such a way that people who do not know the password cannot open it at all.

➤ To require a password to open a document

1. On the **Info** page of the Backstage view, click the **Protect Document** button, and then click **Encrypt with Password**.
2. In the **Encrypt Document** dialog box, in the **Password** box, enter the password you want to assign to the document. Then click **OK**.

Or

1. In the left pane of the Backstage view, click **Save As**.
2. At the bottom of the **Save As** dialog box, click **Tools**, and then click **General Options**.
3. In the **General Options** dialog box, in the **Password to open** box, enter the password you want to assign to the document. Then click **OK**.

> **Tip** Instead of setting a password, you can select the Read-Only Recommended check box to cause Word to display a message suggesting that the document be opened as read-only.

4. In the **Confirm Password** dialog box, in the **Reenter password to modify** box, enter the password, and then click **OK**.
5. In the **Save As** dialog box, click **Save**. If prompted to do so, click **Yes** to confirm that you want to replace the existing file.

➤ **To require a password to modify a document**

1. In the left pane of the Backstage view, click **Save As**.
2. At the bottom of the **Save As** dialog box, click **Tools**, and then click **General Options**.
3. In the **General Options** dialog box, in the **Password to modify** box, enter the password you want to assign to the document. Then click **OK**.
4. In the **Confirm Password** dialog box, in the **Reenter password to modify** box, enter the password, and then click **OK**.
5. In the **Save As** dialog box, click **Save**. If prompted to do so, click **Yes** to confirm that you want to replace the existing file.

➤ **To remove a password requirement**

1. In the left pane of the Backstage view, click **Save As**.
2. At the bottom of the **Save As** dialog box, click **Tools**, and then click **General Options**.
3. In the **General Options** dialog box, delete the content of the **Password to open** or **Password to modify** box. Then click **OK**.
4. In the **Save As** dialog box, click **Save**. Then click **Yes** to confirm that you want to replace the existing file.

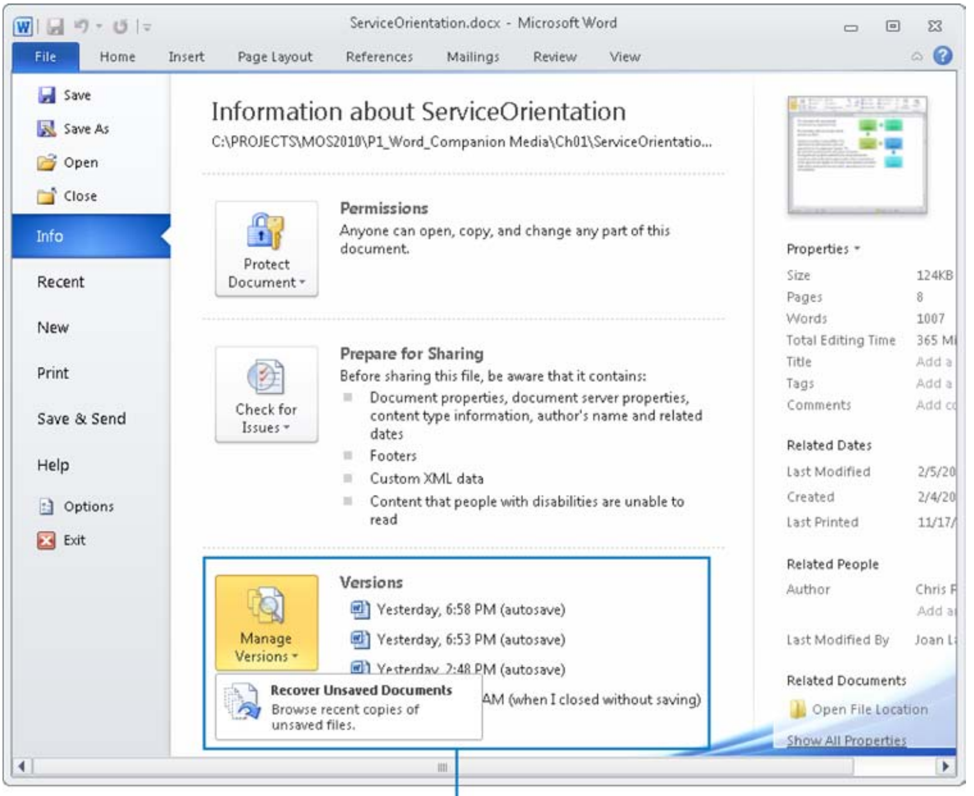
Practice Tasks

The practice files for these tasks are located in the Word\Objective1 practice file folder. Save the results of the tasks in the same folder.

- Open the *Finalizing* document, mark it as final, and save it as *MyFinalizing*. Then close and reopen the document, note the functionality that is unavailable, and remove the Marked As Final designation.
- Open the *Password* document, set the password for the file to *P@ssword*, and save it as *MyPassword*. Then close and reopen the document.

1.3 Manage Document Versions

Like other Office programs, Word automatically saves a temporary copy of an open file every 10 minutes. If you close a file without saving it, you can return to the most recently saved temporary version. You can also display the temporary copies of files that you started but never saved.



Document versions

➤ To change the AutoSave frequency

➜ On the **Save** page of the **Word Options** dialog box, in the **Save AutoRecover information every** box, enter a number of minutes from 1 through 120.

➤ To display a previous (saved) version of the current document

➜ On the **Info** page of the Backstage view, in the **Versions** list, click the version of the file you want to display.

➤ **To replace the current file with a previous version**

1. Display the previous version of the file.
2. On the **Autosaved Version** bar that appears below the ribbon, click **Restore**.

➤ **To display a temporary (unsaved) version of a document**

1. On the **Info** page of the Backstage view, click the **Manage Versions** button, and then click **Recover Unsaved Documents**.
2. In the **Open** dialog box displaying the contents of your UnsavedFiles folder, click the file you want to display, and then click **Open**.

➤ **To delete temporary document versions**

1. On the **Info** page of the Backstage view, click the **Manage Versions** button, and then click **Delete All Unsaved Documents**.
2. In the dialog box prompting you to confirm the deletion, click **Yes**.

Practice Tasks

The practice file for these tasks is located in the Word\Objective1 practice file folder. Save the results of the tasks in the same folder.

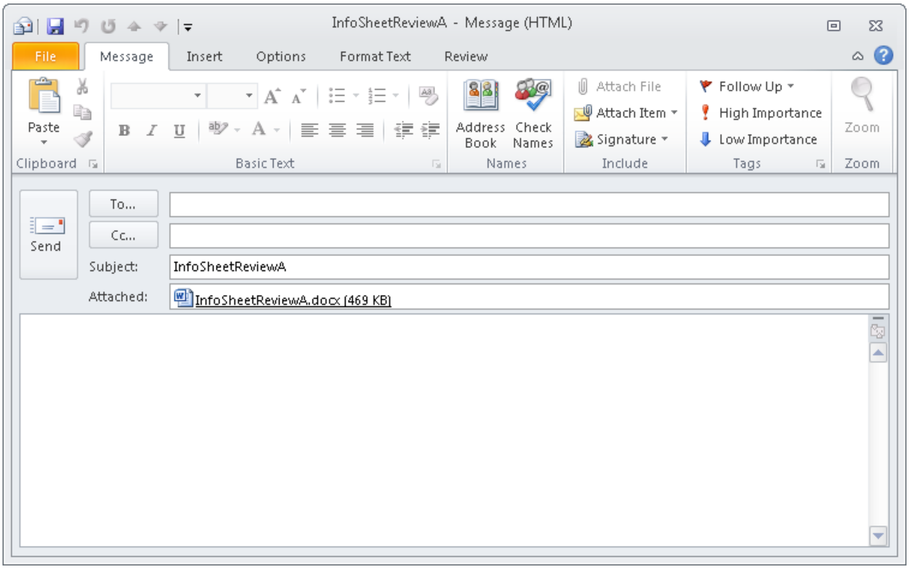
- Open the *Versions* document and save it as *MyVersions*. Configure Word to automatically save a draft version of the document every 1 minute.
- In the *MyVersions* document, change the title to *Business Office Procedures*. Then save the document.
- Display and then restore the original version of the *MyVersions* document.

1.4 Share Documents

Sending Documents

Word 2010 provides many simple ways of sharing documents, even without first saving them. From within Word, you can send a document as an email attachment, share a document from a Windows Live SkyDrive site or SharePoint site, or convert a document and send it as a PDF file or an XPS file.

> **Tip** If you have the services of a third-party online fax service provider, you can send a document from within Word as an Internet fax.



➤ To send a document as an email message attachment

1. In the left pane of the **Save & Send** page of the Backstage view, click **Send Using E-mail**.
2. In the right pane of the **Save & Send** page, do one of the following:
   - Click the **Send as Attachment** button to send the document as a .docx file.
   - Click the **Send as PDF** button to send the document as a .pdf file.
   - Click the **Send as XPS** button to send the document as an .xps file.

> **Tip** It is not necessary to provide a file name when sending a document that has not yet been saved.

3. Enter the recipient name and other necessary information in the email message composition window, and then send the message.

➤ To send a link to a shared document

1. Save the document in a shared location.
2. In the left pane of the **Save & Send** page of the Backstage view, click **Send Using E-mail**.

3. In the right pane of the Save & Send page, click the **Send a Link** button.
4. Enter the recipient name and other necessary information in the email message composition window, and then send the message.

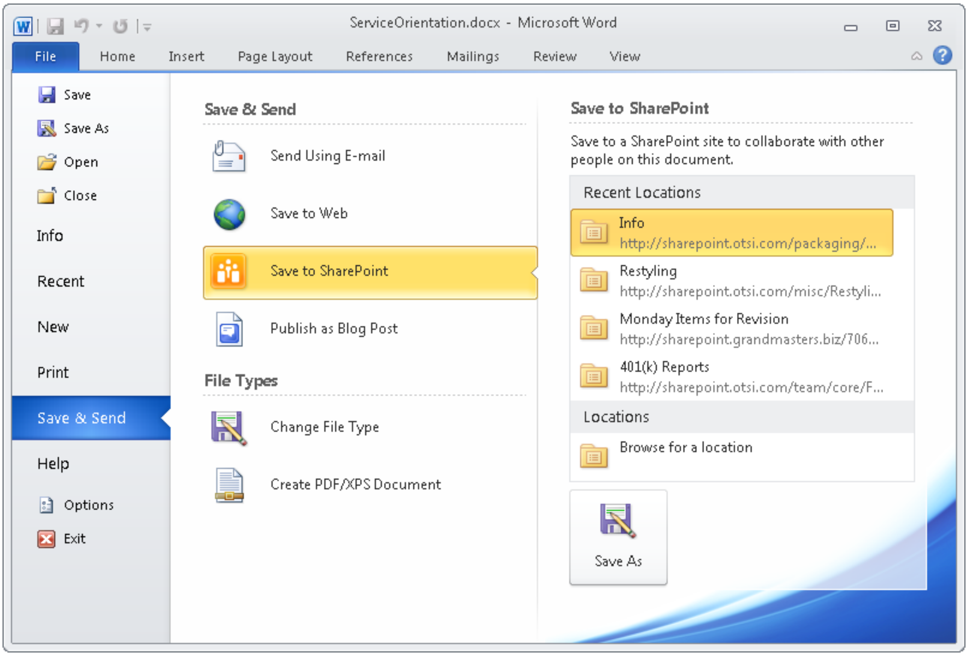
Saving Documents in Shared Locations

You can share a document with other people by saving it to a Windows Live SkyDrive folder or to a SharePoint site.

> **Tip** A free Windows Live SkyDrive account allows you to store and share up to 25 GB of files, such as photos and Microsoft Office documents, on the Internet. To create a Windows Live SkyDrive folder, visit skydrive.live.com, and sign in with your Windows Live ID.

To develop a document with other users, you need to save it to a SharePoint 2010 site. You then continue to work on it from the site. When another contributor begins making changes to the file stored on the site, Word alerts you to that person's presence. You can display a list of the other people who are actively working on the document and their availability.

As the people working on the document make changes, Word keeps track of them. When you finish working with the document, you save and close it as usual. The next time you open it, you'll see the changes made by anyone else who has worked on the document.



➤ To save a document to an existing Windows Live SkyDrive folder

1. In the left pane of the **Save & Send** page of the Backstage view, click **Save to Web**.
2. In the right pane of the **Save & Send** page, in the **Shared Folders** list, click the folder in which you want to save the document. Then click the **Save As** button.
3. In the **Save As** dialog box displaying the selected workspace, enter a file name, select a file format, and then click **Save**.

➤ To create a Windows Live SkyDrive folder from within Word

1. In the left pane of the **Save & Send** page of the Backstage view, click **Save to Web**.
2. In the right pane of the **Save & Send** page, click the **New Folder** button.
3. On the Windows Live SkyDrive site, follow the instructions to log in and create a folder.
4. On the **Save & Send** page, click the **Refresh** button.

➤ To save a document to a SharePoint site

1. In the left pane of the **Save & Send** page of the Backstage view, click **Save to SharePoint**.
2. In the **Recent Locations** list, click the SharePoint document library in which you want to save the file.

   Or

   In the **Locations** list, click **Browse for a location**.

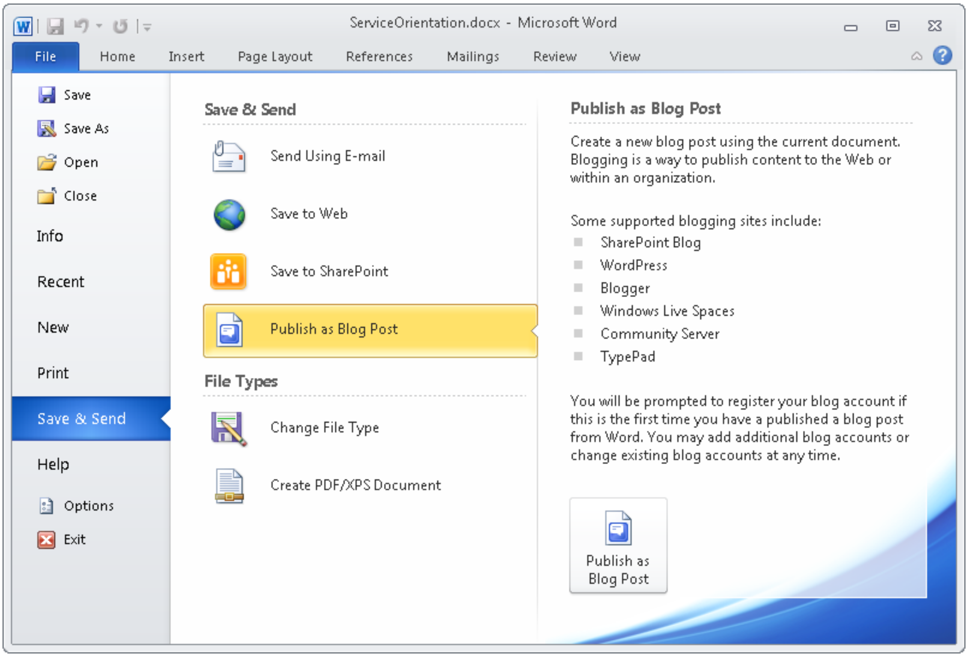
> **Tip** You can save a document only to an existing document library; you can't create a document library from within Word.

3. Click the **Save As** button.
4. In the **Windows Security** dialog box, enter your SharePoint site credentials, and then click **OK**.
5. In the **Save As** dialog box, if necessary, browse to the document library in which you want to save the file. Then enter a file name, select a file format, and click **Save**.

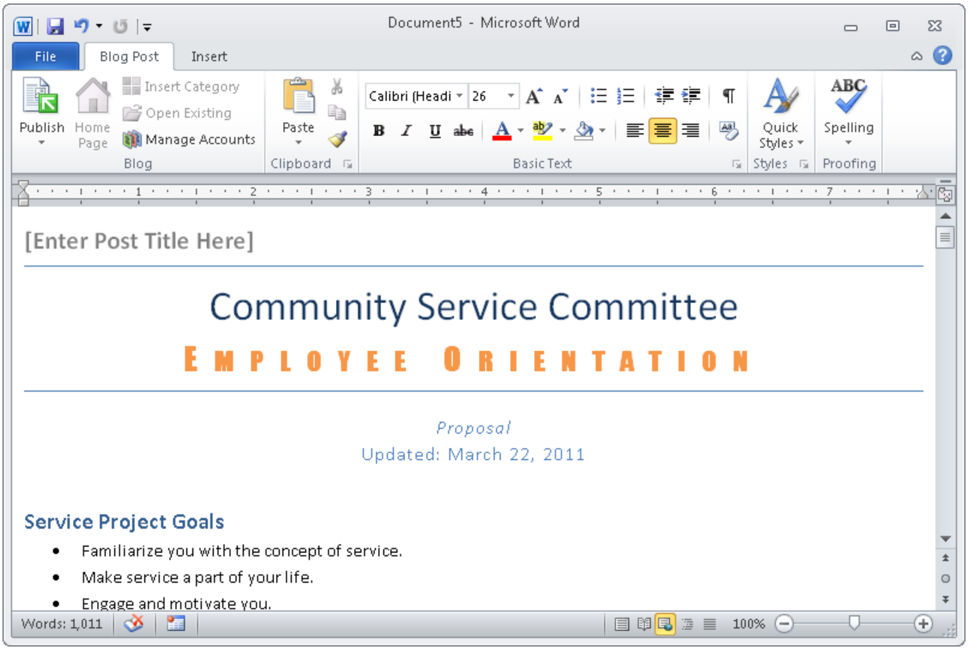
Publishing Documents as Blog Posts

You can share the content of a document with other people by publishing it as a blog post. If you have already set up a blog account with a blog service provider, you can register your account with Word the first time you create a blog post. If you haven't yet set up the blog account, you need to register with a service provider before you can publish your first post. Thereafter, Word uses your registered account information when you create or publish a blog post.

You can publish any document as a blog post.



You can also create a blog post by using a template designed specifically for that purpose, publish a draft of the post to your blog space, and then publish the final version.



➤ To create a document specifically as a blog post

1. Create a blog account with a provider such as WordPress.
2. On the **New** page of the Backstage view, under **Available Templates**, click **Blog post**. Then in the right pane, click the **Create** button.
3. If you have not already registered your blog account with Word, click **Register Now** in the **Register a Blog Account** dialog box, and follow the instructions to register your existing account.
4. Enter the content you want to publish to your blog, and then save the file.
5. On the **Blog Post** tab, in the **Blog** group, click the **Publish** arrow, and then click **Publish as Draft**.
6. In the **Connect To <Blog Title>** dialog box, enter the space name and password for your blog, and then click **OK**.
7. On the **Blog Post** tab, in the **Blog** group, click the **Home Page** button.
8. Display and review the draft blog post. Make any necessary changes, and then click **Publish**.

➤ **To publish a document as a blog post**

1. In the left pane of the **Save & Send** page of the Backstage view, click **Publish as Blog Post**.
2. In the right pane of the **Save & Send** page of the Backstage view, click the **Publish as Blog Post** button.
3. If you have not already registered your blog account with Word, click **Register Now** in the **Register a Blog Account** dialog box, and follow the instructions to register your existing account.
4. On the **Blog Post** tab, in the **Blog** group, click the **Publish** arrow, and then click **Publish as Draft**.
5. In the **Connect To <Blog Title>** dialog box, enter the space name and password for your blog, and then click **OK**.
6. On the **Blog Post** tab, in the **Blog** group, click the **Home Page** button.
7. Display and review the draft blog post. Make any necessary changes, and then click **Publish**.

Practice Tasks

The practice file for these tasks is located in the Word\Objective1 practice file folder. Save the results of the tasks in the same folder.

Tip You can perform these tasks only if you have a blog account or set up a blog account during the process.

- Create a new document based on the Blog Post document template. Replace the title placeholder with *Walla Walla Music* and paste the first two paragraphs of the *Orchestra* document into the content area. Then save the document as *MyBlogPost*.
- Publish a draft of the *MyBlogPost* document to your blog. Then display the blog post, change the title to *Walla Walla Symphony Orchestra Review*, and publish a final version of the post to your blog.
- Publish the *Orchestra* document directly to your blog.

1.5 Save a Document

The 2007 Microsoft Office system introduced a new set of file formats based on XML, called Microsoft Office Open XML Formats. By default, Word 2010 (and Word 2007) documents are saved in the .docx format, which is a Word-specific Open XML format. The .docx format provides the following benefits:

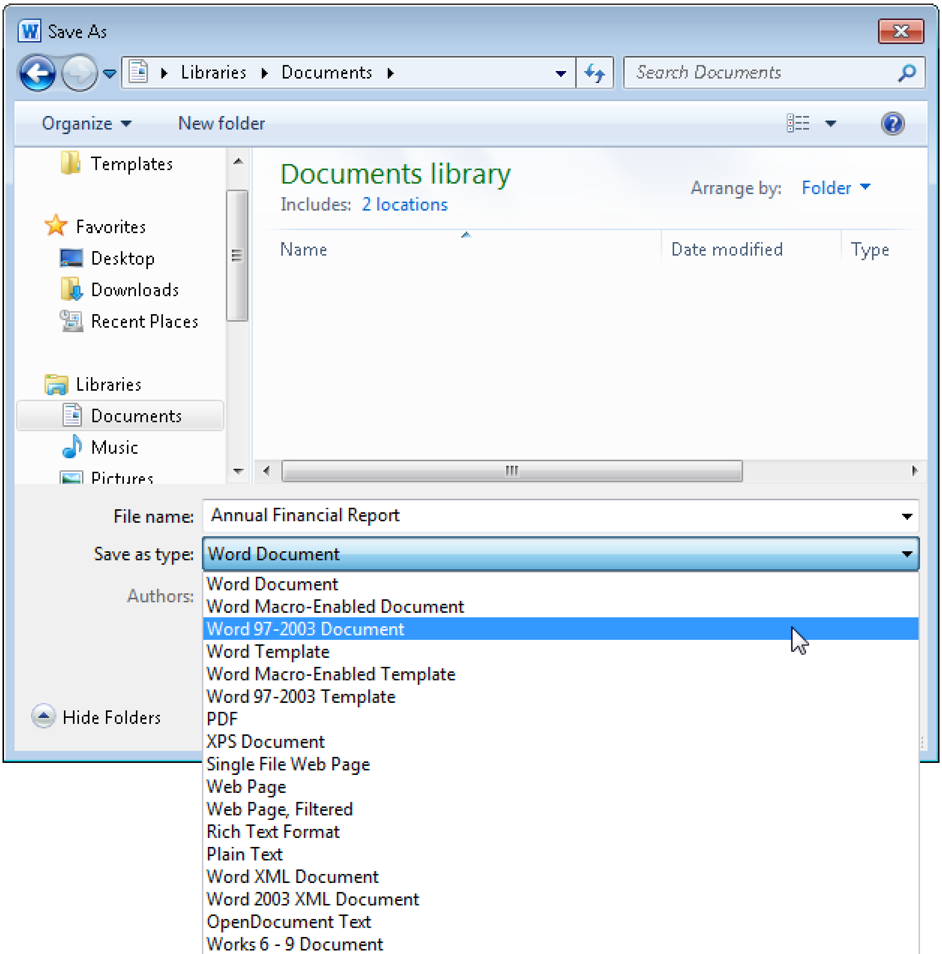
- File sizes are smaller than with previous file formats.
- It is simpler to recover damaged content because XML files can be opened in a variety of text editors.
- Security is greater because .docx files cannot contain macros, and personal data can easily be identified and removed from files.

Documents saved in the .docx format can be opened by Word 2010 and Word 2007. Users of earlier versions of Word can download a converter that will allow them to open a .docx file in their version of Word.

In addition to the .docx format, Word provides these Open XML formats:

- **.docm** This format is for macro-enabled documents.
- **.dotx** This format is for document templates.
- **dotm** This format is for macro-enabled document templates.

You can save a Word document in many formats, some of which optimize the file for specific uses.



Strategy You should be familiar with the types of file formats in which you can save Word documents and when it is appropriate to use each one.

If you intend to share a Word document specifically with users of Word 2003, 2002, 2000, or 97, you can save it in the .doc file format used by those versions of the program. Word 2010 opens .doc files in Compatibility Mode. Compatibility Mode turns off advanced program features; these features can be re-enabled by saving the file in one of the current file formats.

If you want to save a Word document in a format that can be opened by the widest variety of programs, use one of the following formats:

- **Rich Text Format (.rtf)** This format preserves the document's formatting.
- **Plain Text (.txt)** This format preserves only the document's text.

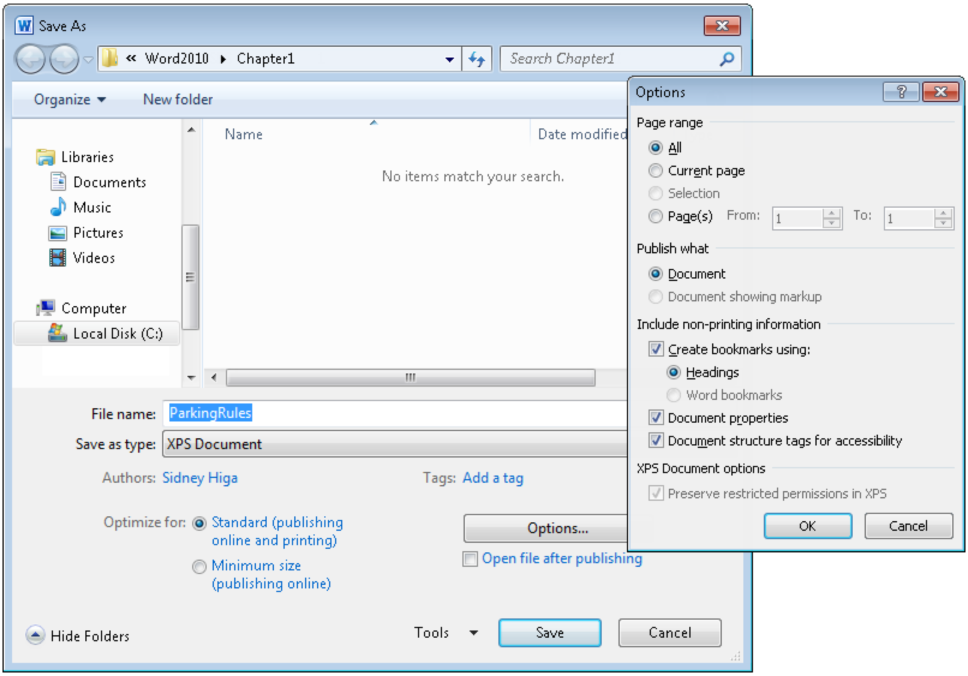
If you want to ensure that the appearance of the file content is the same no matter what computer or device it is displayed on, or if you want to ensure that other people can't easily modify the file, you can save it in one of the following formats:

- **Portable document format (PDF)** A fixed-layout document format created by Adobe Systems. A PDF file includes the text, fonts, images, and vector graphics that compose the document. The Adobe Reader or Adobe Acrobat software is required to view a PDF document.
- **XML Paper Specification (XPS) document format** A fixed-layout document format created by Microsoft. The XPS document format consists of structured XML markup that defines the layout of a document and the visual appearance of each page, along with rendering rules for distributing, archiving, rendering, processing, and printing the documents.

Each of these formats displays content in a device-independent manner.

When you save a Word document in PDF or XPS format, you can optimize the file size of the document for your intended distribution method. You can also do the following:

- Specify the pages to include in the .pdf or .xps version of the document.
- Include or exclude comments and tracked changes.
- Include or exclude items such as bookmarks and properties.
- Set specific PDF options.

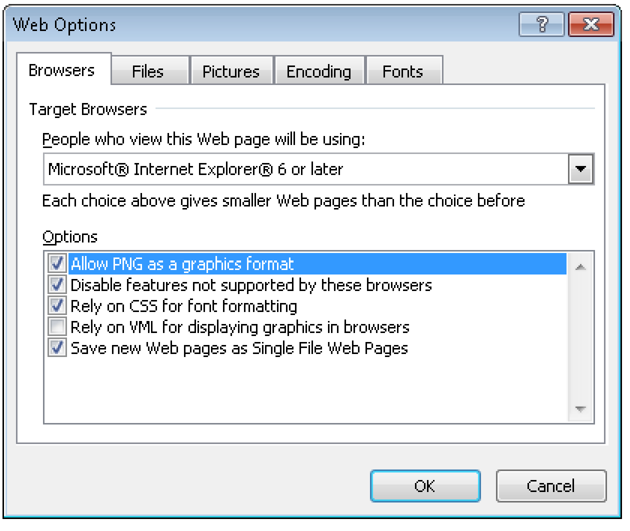


You can save a document as a webpage in any of three formats:

- **Web Page** This format saves the webpage as an .htm file with a folder of supporting files that ensure the page is rendered exactly as you want it.
- **Single File Web Page** This format embeds all the information necessary to render the webpage in one MIME-encapsulated aggregate HTML (.mhtml) file that can be distributed via email.
- **Web Page, Filtered** This format removes any Office-specific tags from the file and significantly reduces the size of the web document and its accompanying folder of supporting files. However, it can also radically change the look of the document. For example, it might change a shaded background to a solid color, making the resulting page difficult to read.

After you save a document as a webpage, it is no longer a Word document. However, you can still open, view, and edit the webpage in Word, just as you would a normal document. (You can also open and edit HTML-format webpages created in other programs.) Making changes can be as basic as replacing text and adjusting alignment, or as advanced as moving and inserting graphics. When you finish modifying the webpage, you can resave it as a webpage, or save it as a regular Word document.

In the Web Options dialog box, which is available from the Tools menu in the Save As dialog box, you can specify which browsers you anticipate will be used to view your webpages. You can also have Word disable any features that are incompatible with the specified browsers.



Strategy **View the other pages of the Web Options dialog box to familiarize yourself with the kinds of settings available for webpages.**

➤ To save a document in a specific format

1. In the left pane of the Backstage view, click **Save As**.
2. In the **Save As** dialog box, browse to the folder in which you want to save the document. Enter a file name, select a file format, and then click **Save**.

   Or

1. In the left pane of the **Save & Send** page of the Backstage view, click **Change File Type**.
2. In the right pane of the **Save & Send** page, in the **Document File Types** or **Other File Types** list, click the file format in which you want to save the document.

3. Click the **Save As** button.
4. In the **Save As** dialog box, browse to the folder in which you want to save the document. Enter a file name, select a file format, and then click **Save**.

➤ **To save a document as a PDF file or an XPS file**

1. In the left pane of the Backstage view, click **Save As**. In the **Save As** dialog box, browse to the folder in which you want to save the document, and enter a file name. Then in the **Save as type** list, click **PDF (.pdf)**.

   Or

   In the left pane of the **Save & Send** page of the Backstage view, click **Create PDF/XPS Document**. Then in the right pane, click the **Create PDF/XPS** button. In the **Publish as PDF or XPS** dialog box, browse to the folder in which you want to save the document, and enter a file name.
2. In the **Optimize for** area, click **Standard** to generate a larger, higher-quality file or **Minimum size** to generate a smaller, lower-quality file. Then click **Options**.
3. In the **Options** dialog box, select the document content you want to include in the file, and then click **OK**.
4. In the **Save As** dialog box, click **Save**.

   Or

   In the **Publish as PDF or XPS** dialog box, click **Publish**.

Practice Tasks

The practice files for these tasks are located in the Word\Objective1 practice file folder. Save the results of the tasks in the same folder.

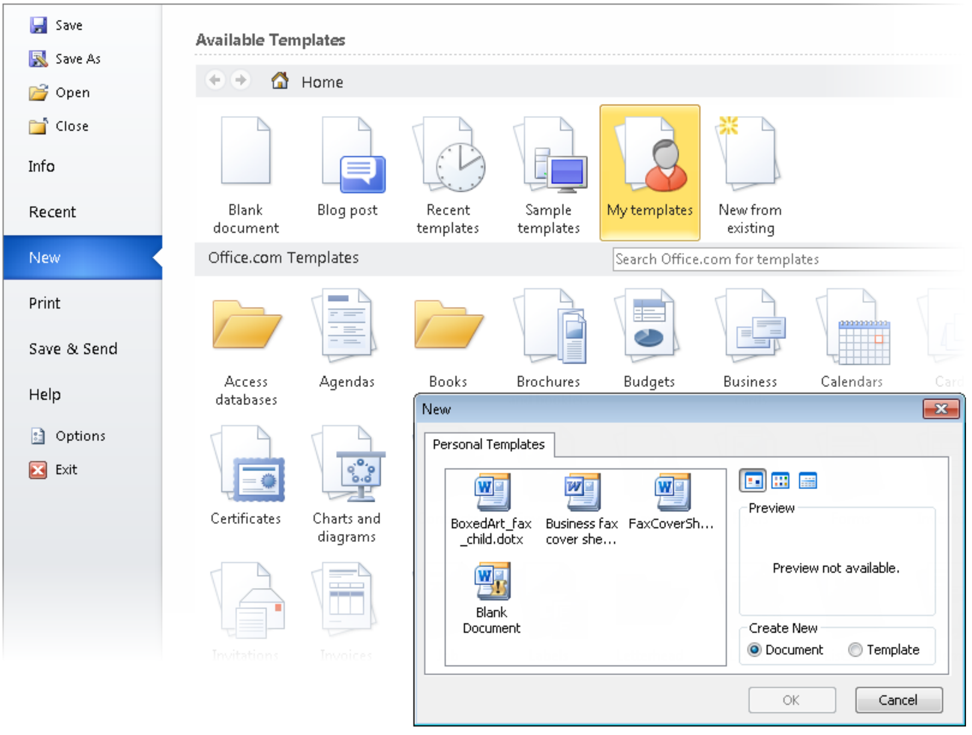
- Open the *Saving1* document, and save it with the name *MyCompatibility* in a format that users of Word 2003 can work in. Close the *MyCompatibility* document and then open it in Compatibility Mode and note the changes in the document.
- Open the *Saving2* document, and save only page 3 as a PDF file named *MyPDF*, ensuring that the document headings are bookmarked in the *MyPDF* file.
- Open the *Saving3* document, and save it as a single-file webpage named *MyWebpage* that is optimized for display at a screen resolution of 1024×768. Then display the *MyWebpage* file in Windows Internet Explorer.

1.6 Apply a Template to a Document

Every new document you create is based on a document template. A Word 2010 document template is a file with a .dotm or .dotx extension that defines information about style sets and color schemes and can also contain content (words and graphics).

See Also For information about using styles and style sets supplied by a template, see section 2.1, "Apply Font and Paragraph Attributes."

When you create a document from the New page of the Backstage view, you base the document on any of the templates installed in the default template location on your computer, or on other templates that you can download from the Microsoft Office Online site.



Tip By default, templates are stored in the AppData\Roaming\Microsoft\Templates subfolder of your personal folder.

The most common document, a blank document, is based on the Normal document template. Word 2010 also comes with document templates from which you can create a blog post and a variety of faxes, letters, reports, and resumes. From the New page, you can download design templates for dozens of types of documents, including brochures, business cards, calendars, lists, menus, and postcards. Some of these templates were created by Microsoft. Others, known as *community templates*, were created and made available by computer users such as yourself.

After you create a document, you can change the template on which the document is based by applying a different template. Document template options can be easily accessed from the Developer tab, which is not displayed on the ribbon by default.

➤ To display the Developer tab

➜ On the **Customize Ribbon** page of the **Word Options** dialog box, in the **Customize the Ribbon** pane, under **Main Tabs**, select the **Developer** check box. Then click **OK**.

➤ To attach a local template to a document

1. On the **Developer** tab, in the **Templates** group, click **Document Template**.
2. On the **Templates** page of the **Templates and Add-ins** dialog box, in the **Document template** area, click **Attach**.
3. In the **Attach Template** dialog box, navigate to and double-click the template you want to attach.
4. In the **Templates and Add-ins** dialog box, select the **Automatically update document styles** check box, and then click **OK**.
5. On the **Home** tab, in the **Styles** group, click the **Change Styles** button, point to **Style Set**, and then click **Reset to Quick Styles from <template name> Template**.

➤ To attach a web template to a document

1. On the **New** page of the Backstage view, in the **Office.com Templates** section, browse to the web template you want to attach.

   Or

   On the **New** page of the Backstage view, in the **Office.com Templates** section header, enter a search term in the **Search Office.com for templates** box, and press Enter. Then locate the web template you want to attach.
2. Select the template and then, in the right pane, click the **Download** button.

3. On the **Developer** tab, in the **Templates** group, click the **Document Template** button.
4. On the **Templates** page of the **Templates and Add-ins** dialog box, in the **Document Template** area, click **Attach**.
5. In the **Attach Template** dialog box, navigate to and double-click the downloaded template.
6. In the **Templates and Add-ins** dialog box, select the **Automatically update document styles** check box, and then click **OK**.
7. On the **Home** tab, in the **Styles** group, click the **Change Styles** button, point to **Style Set**, and then click **Reset to Quick Styles from <template name> Template**.

Practice Tasks

The practice files for these tasks are located in the Word\Objective1 practice file folder. Save the results of the tasks in the same folder.

- Double-click the *ExecutiveResume* document template to open a new document based on the template. In the new document, display the Developer tab on the ribbon. Then save the document as *MyResume*.
- Attach the *UrbanResume* document template to the *MyResume* document and ensure that the document styles are updated to the new template. Then note the differences.

Objective Review

Before finishing this chapter, ensure that you have mastered the following skills:

1.1 Apply Different Views to a Document
1.2 Apply Protection to a Document
1.3 Manage Document Versions
1.4 Share Documents
1.5 Save a Document
1.6 Apply a Template to a Document

2 Formatting Content

The skills tested in this section of the Microsoft Office Specialist exam for Microsoft Word 2010 relate to modifying the appearance and structure of document content, and locating specific content within a document. Specifically, the following objectives are associated with this set of skills:

2.1 Apply Font and Paragraph Attributes
2.2 Navigate and Search Through a Document
2.3 Apply Indentation and Tab Settings to Paragraphs
2.4 Apply Spacing Settings to Text and Paragraphs
2.5 Create Tables
2.6 Manipulate Tables in a Document
2.7 Apply Bullets to a Document

By applying specific styles or formatting to elements of your document, you can organize it and make it easier to read. For example, you can format section headings to indicate the structure of the document or emphasize text by changing its size, applying bold or italic formatting, or underlining it. You can also break down specific points you want to make by setting them up in a bulleted list, or organize data by inserting it in a table.

This chapter guides you in studying ways of formatting document content by applying styles and character formatting; applying indentation and tab settings to paragraphs; and changing the spacing of both paragraphs and text. It also examines ways of navigating through and searching for text; creating and manipulating tables; and creating bulleted lists.

> **Practice Files** Before you can complete the practice tasks in this chapter, you need to copy the book's practice files to your computer. The practice files you'll use to complete the tasks in this chapter are in the Word\Objective2 practice file folder. A complete list of practice files is provided in "Using the Book's Companion Content" at the beginning of this book.

2.1 Apply Font and Paragraph Attributes

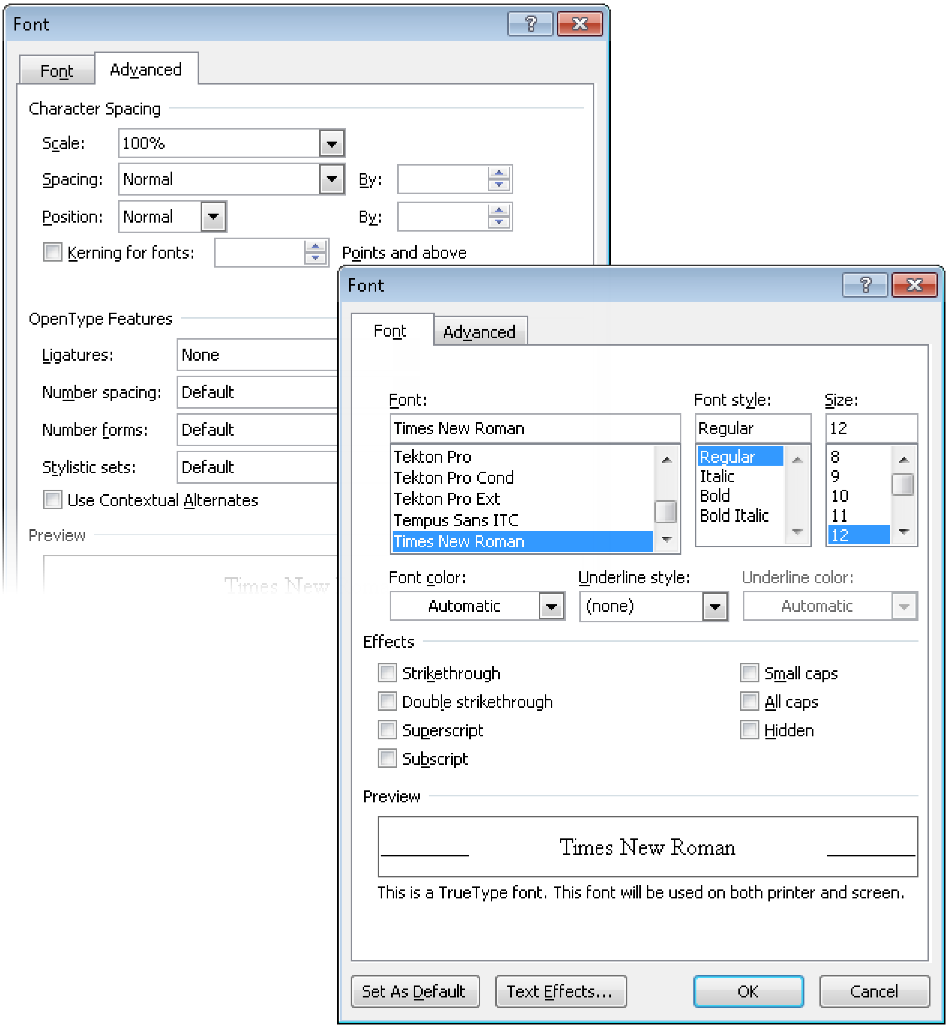
Applying Character Formatting

By default, the font used for text in a new Word document is Calibri, but you can change the font at any time. Each font consists of characters, numbers, and/or symbols that share a common design. You can vary the look of the base font by changing the following attributes:

- **Size** Almost every font comes in a range of sizes, measured in points. A point is approximately 1/72 of an inch.
- **Style** The most common styles are regular (or plain), italic, bold, and bold italic.
- **Color** The palette includes the colors of the theme applied to the document and a set of standard colors. You can also specify custom colors.
- **Underline** You can choose from a variety of underline styles as well as change the underline color.
- **Effects** Various enhancements can be applied, such as strikethrough, shadows, or embossing. You can also hide text by applying the Hidden font effect.
- **Case** You can specify small capital letters (small caps), all capital letters, or all lowercase. You can mix the case by specifying that the first word in a selection should have an initial capital letter (sentence case) or all words should have initial capital letters (title case). You can also toggle the case of selected text, changing all uppercase letters to lowercase and lowercase letters to uppercase.
- **Character spacing** You can push characters apart or squeeze them together. This is also called *kerning*.

After you select an appropriate font for a document, you can use these attributes to achieve different effects. Although some attributes might cancel each other out, they are usually cumulative. Collectively, the font and its attributes are called *character formatting*.

You can change the character formatting of a selection by clicking buttons on the Mini Toolbar or in the Font group on the Home tab. You can change several character formats at once from the Font dialog box.



Strategy Word provides so many ways to format text that it would be impossible to detail them all here. Be sure you are familiar with the attributes available from the Font group on the Home tab and from the Font dialog box.

➤ To apply character formatting to selected text

➜ On the Mini Toolbar, or in the **Font** group on the **Home** tab, click the attribute you want to apply.

> **Tip** You can format a word by clicking anywhere in the word (other than at the beginning or the end) and then clicking the attribute you want to apply.

➤ To change the font size of selected text

➜ On the Mini Toolbar or in the **Font** group on the **Home** tab, click the **Grow Font** button to increase the font to the next standard size, or click the **Shrink Font** button to decrease the font to the next standard size.

➤ To change the case of selected text

➜ On the **Home** tab, in the **Font** group, click the **Change Case** button, and then click **Sentence case**, **lowercase**, **UPPERCASE**, **Capitalize Each Word**, or **tOGGLE cASE**.

➤ To apply a special effect to selected text

➜ In the **Font** group, click the **Strikethrough**, **Subscript**, or **Superscript** button.

Or

1. On the **Home** tab, click the **Font** dialog box launcher.
2. On the **Font** page of the **Font** dialog box, in the **Effects** area, select the check box for the effect you want to apply. Then click **OK**.

➤ To change the character spacing of selected text

1. In the **Font** dialog box, display the **Advanced** page.
2. In the **Character Spacing** area, change the **Spacing** setting to **Expanded** or **Condensed**, set the number of points of expansion or contraction, and then click **OK**.

➤ To highlight selected text

➜ On the Mini Toolbar, in the **Highlight** list, click the color you want.

➜ On the **Home** tab, in the **Font** group, in the **Text Highlight Color** list, click the color you want.

> **Tip** If you click the Highlight button without first making a selection, the mouse pointer becomes a highlighter that you can drag across text. Click the Highlight button again or press Esc to turn off the highlighter.

➤ To clear formatting from selected text

- ➜ On the **Home** tab, in the **Font** group, click the **Clear Formatting** button.
- ➜ Press Ctrl+Spacebar.

Strategy In addition to character formatting, you can apply various attributes, including alignment, shading, and borders, to entire paragraphs. Be sure you are familiar with these simple types of paragraph formatting.

Applying Styles

Styles are named sets of paragraph and/or character formatting that you can use in place of manual formatting to produce a consistent look throughout a document. There are five types of styles: Character, Paragraph, Linked, Table, and List. The most common types of styles you will use are the following:

- **Paragraph styles** You can use these styles to apply a consistent look to different types of paragraphs, such as headings, body text, captions, quotations, and list paragraphs. Some built-in paragraph styles, such as Heading 1 and Heading 2, are associated with outline levels.
- **Character styles** You can use these styles to change the appearance of selected words.

You can view the available styles in several locations, including the following:

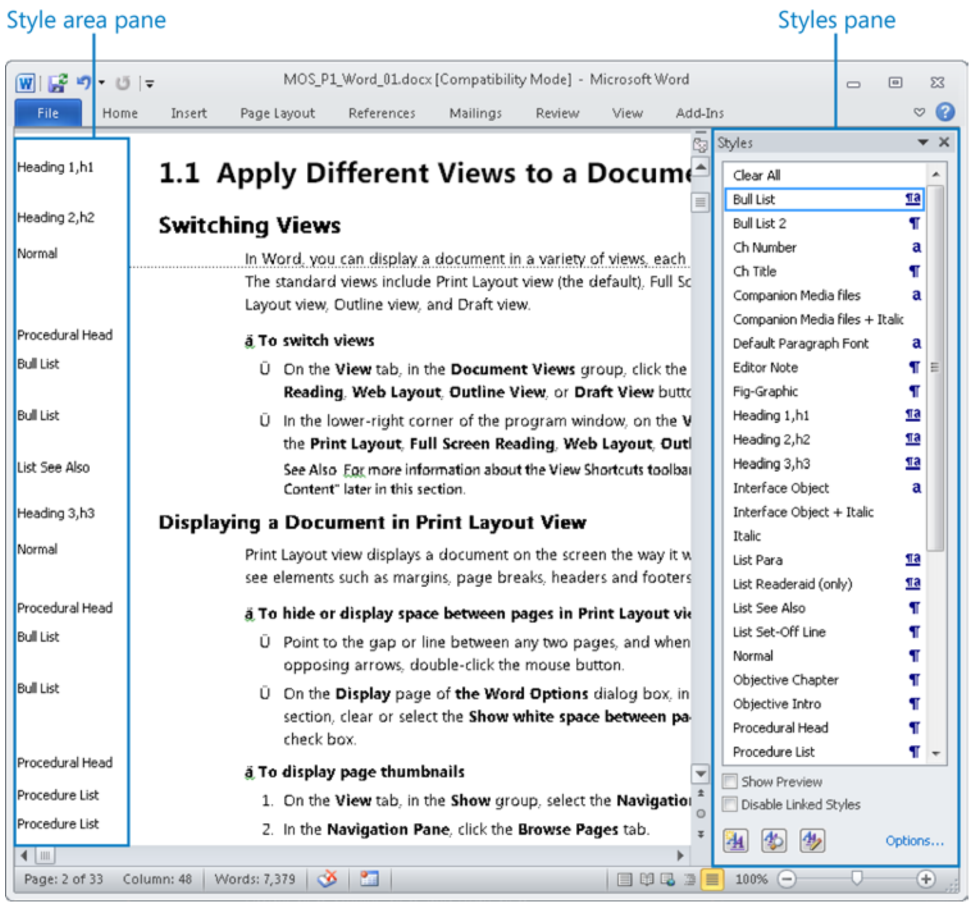
- In the Styles group on the Home tab of the ribbon, the Quick Styles gallery displays the styles designated in the active style set as Quick Styles. Part of the Quick Styles gallery is visible at all times in the Styles group—the number of visible styles depends on the width of your program window and screen resolution. You can scroll the gallery or expand it to display all the current Quick Styles. From the Quick Styles gallery, you can apply and manage all Quick Styles.
- At the right side of the program window, the Styles pane displays all the styles available in the currently active document templates or a subset thereof, such as only those that are currently in use. You can display or hide the Styles pane, and from it you can apply and manage all styles, including those designated as Quick Styles.

  See Also **For information about templates, see section 1.6, “Apply a Template to a Document.”**

  In the Styles pane, paragraph styles are identified by a paragraph mark, and character styles are identified by the letter *a*. You can point to any style to display a ScreenTip detailing the formatting included in the style.

- At the left side of a document displayed in Draft view or Outline view, the style area pane displays the name of the style attached to each paragraph. The style area pane does not display character styles. You can display or hide the style area pane.

> **See Also** For information about displaying the style area pane, see section 1.1, "Apply Different Views to a Document."



You can tell Word to select all text to which a particular style is applied and then globally switch to a different style. You can also globally clear the formatting of a particular style so that the text reverts to Normal style.

➤ To display the style area pane in a document

1. Display the document in Draft view or Outline view.
2. Display the **Advanced** page of the **Word Options** dialog box.
3. In the **Display** area, enter a positive number in the **Style area pane width in Draft and Outline views** box. Then click **OK**.

➤ To display the Styles pane in the program window

➜ On the **Home** tab, click the **Styles** dialog box launcher.

➤ To display visual representations of styles in the Styles pane

➜ At the bottom of the **Styles** pane, select the **Show Preview** check box.

➤ To display a specific selection of styles in the Styles pane

1. At the bottom of the **Styles** pane, click **Options**.
2. In the **Style Pane Options** dialog box, click **Recommended**, **In use**, **In current document**, or **All styles** in the **Select styles to show** list.
3. In the **Select how list is sorted** list, click **Alphabetical**, **As Recommended**, **Font**, **Based on**, or **By type**.
4. Select the check boxes for the types of formatting you want to show as styles, and then click **OK**.

➤ To apply a character style

1. Select the text you want to format.
2. In the **Styles** pane, click the character style you want to apply.

➤ To apply a paragraph style

1. Select or position the cursor anywhere in the paragraph you want to format.
2. In the **Styles** pane, click the paragraph style you want to apply.

➤ To apply a Quick Style

1. Select or position the cursor in the text you want to format.
2. On the **Home** tab, in the **Quick Styles** gallery, click the style you want to apply.

➤ To clear all instances of a style

1. On the **Advanced** page of the **Word Options** dialog box, ensure that the **Keep track of formatting** check box is selected in the **Editing options** section.
2. In the **Styles** pane, point to the style you want to clear, click the arrow that appears, and then click **Clear Formatting of Instance(s)**.

➤ To copy existing formatting to other text

1. Select the text that has the formatting you want to copy.
2. On the Mini Toolbar or in the **Clipboard** group on the **Home** tab, click the **Format Painter** button once if you want to apply the copied formatting only once, or click it twice if you want to apply the copied formatting multiple times.
3. Click the word or select the text to which you want to apply the copied formatting. If you clicked the **Format Painter** button twice, repeat this step as many times as you want.
4. When you finish, click the **Format Painter** button again, or press the Esc key, to turn off the Format Painter.

Practice Tasks

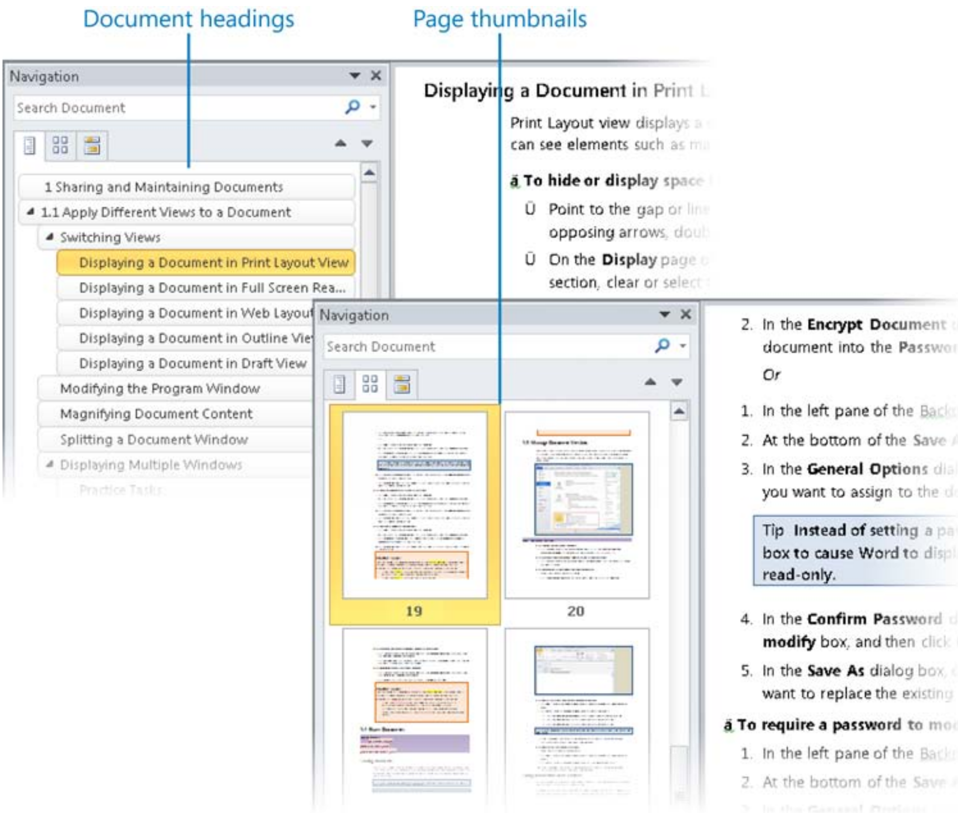
The practice files for these tasks are located in the Word\Objective2 practice file folder. If you want to save the results of the tasks, save them in the same folder with *My* appended to the file name so that you don't overwrite the original practice file.

- In the *Characters* document, format the *Beautiful Bamboo* heading with the Stencil font. Make it bold and 26 points, apply the Outline effect, and expand the character spacing by 2 points. Then change its color to the light green standard color.
- In the *Characters* document, in the paragraph that begins *Because they are so easy to grow*, format the names *chimonobambusa marmorea*, *indocalamus tessellatus*, *pleioblastus chino vaginatus*, *bambusa glaucophylla*, and *otatea acuminata aztecorum* in small caps. Then change all small caps formatting to italic.
- In the *Styles* document, display the style area pane at the left side of the document in Draft view. Apply the formatting of the *Author Meet and Greet Update* heading to the *Fantasy Author Starts Book Tour* paragraph at the bottom of the document by using the Format Painter.

2.2 Navigate and Search Through a Document

Moving Around in a Document

The Navigation Pane has two pages on which you can display headings and page thumbnails. You can move to specific locations in the document by clicking items on these pages in the Navigation Pane.



➤ To display and move to document headings

1. On the **View** tab, in the **Show** group, select the **Navigation Pane** check box.
2. In the **Navigation Pane**, click the **Browse the headings in your document** tab.
3. To move to a specific section of the document, click its heading in the **Navigation Pane**.

> **Tip** The Navigation Pane displays only headings that are formatted with heading paragraph styles. For information about paragraph styles, see section 2.1, "Apply Font and Paragraph Attributes."

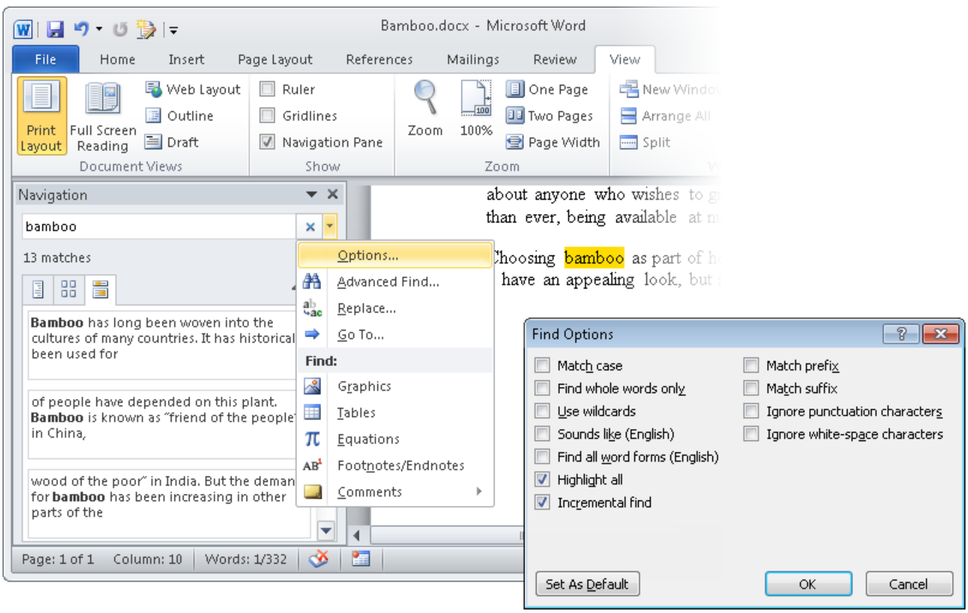
➤ To display and move to pages

1. In the **Navigation Pane**, click the **Browse the pages in your document** tab.
2. To move to a specific page of the document, click its thumbnail in the **Navigation Pane**.

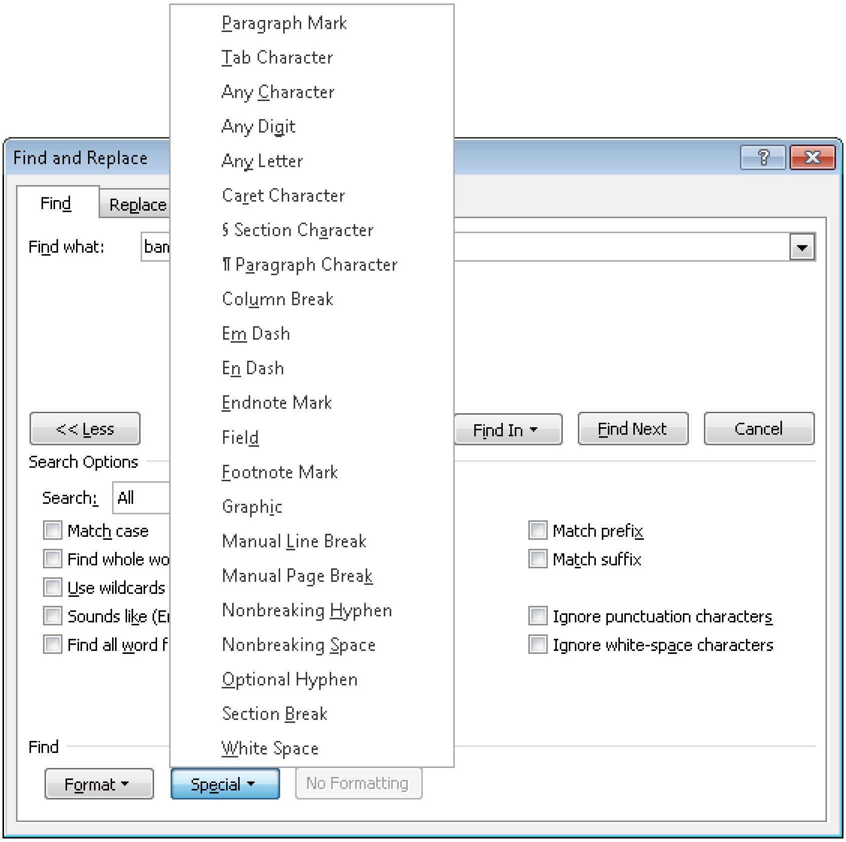
> **Tip** You can display more or fewer page thumbnails in the Navigation Pane by changing its width. To change the width of the Navigation Pane, drag its right border.

Searching for Content and Formatting

You can search for text from the Navigation Pane, and refine the search by selecting options in the Find Options dialog box.



In addition to simple content, you can locate specific formatting, styles, and special characters by using the Find And Replace dialog box.



> **Strategy** Be familiar with the elements and characters you can locate from the Format and Special menus in the expanded Find And Replace dialog box.

➤ To locate text

1. In the **Search Document** box at the top of the **Navigation Pane**, enter the text you want to locate.
2. In the **Navigation Pane**, click the **Browse the results from your current search** tab.
3. To move to a specific search result, click the entry in the **Navigation Pane**.
4. To refine the search, click the **Find Options and additional search commands** arrow, and then click **Options**.
5. In the **Find Options** dialog box, select the check boxes of additional search parameters, and then click **OK**.

➤ **To locate styles and formatting**

1. On the **Home** tab, in the **Editing** group, click the **Find** arrow, and then click **Advanced Find**.

   Or

   In the **Navigation Pane**, on the **Browse the results from your current search** page, click the **Find Options and additional search commands** arrow, and then click **Advanced Find**.
2. On the **Find** page of the **Find and Replace** dialog box, click the **Format** button, and then click the type of formatting you want to locate. Refine the formatting identification if necessary, and then click **OK**.

➤ **To locate special characters**

1. On the **Home** tab, in the **Editing** group, click the **Find** arrow, and then click **Advanced Find**.

   Or

   In the **Navigation Pane**, on the **Browse the results from your current search** page, click the **Find Options and additional search commands** arrow, and then click **Advanced Find**.
2. On the **Find** page of the **Find and Replace** dialog box, click the **Special** button, and then click the character you want to locate.

➤ **To highlight all occurrences of text or formatting**

1. On the **Home** tab, in the **Editing** group, click the **Find** arrow, and then click **Advanced Find**.
2. On the **Find** page of the **Find and Replace** dialog box, specify the text or formatting you want to highlight, click **Reading Highlight**, and then click **Highlight All**.

➤ **To replace text or formatting**

1. On the **Home** tab, in the **Editing** group, click the **Replace** button.
2. On the **Replace** page of the **Find and Replace** dialog box, do the following:
   - Click the **Find what** box, and then specify the text and/or formatting you want to replace.
   - In the **Search Options** area, refine the search specifications as necessary.
   - Click the **Replace with** box, and then specify the replacement text and/or formatting.

3. On the **Replace** page, do one of the following:
   - Click **Replace All** to replace all instances of the specified text and/or formatting.
   - Click **Find Next** to locate the first instance of the specified text and/or formatting. Then click **Replace** to replace the instance and move to the next, or **Find Next** to move to the next instance without making a change.

➤ To locate document elements

- ➜ In the **Navigation Pane**, on the **Browse the results from your current search** page, click the **Find Options and additional search commands** arrow and then, in the **Find** section, click the element you want to locate.
- ➜ Below the vertical scroll bar, click the **Select Browse Object** button, and then click the element you want to locate.

  Or

1. On the **Home** tab, in the **Editing** group, click the **Find** arrow, and then click **Go To**.
2. On the **Go To** page of the **Find and Replace** dialog box, in the **Go to what** list, click the element you want to locate.

Practice Tasks

The practice file for these tasks is located in the Word\Objective2 practice file folder. If you want to save the results of the tasks, save them in the same folder with *My* appended to the file name so that you don't overwrite the original practice file.

- In the *Finding* document, highlight all instances of *The Taguien Cycle*. Then change all instances of *The Taguien Cycle*, to italic.
- On page 2 of the *Finding* document, change the style of the last four lines of text on the page to Subtitle.
- In the Finding document, replace all instances of nonbreaking spaces with regular spaces.

2.3 Apply Indentation and Tab Settings to Paragraphs

Indenting Paragraphs

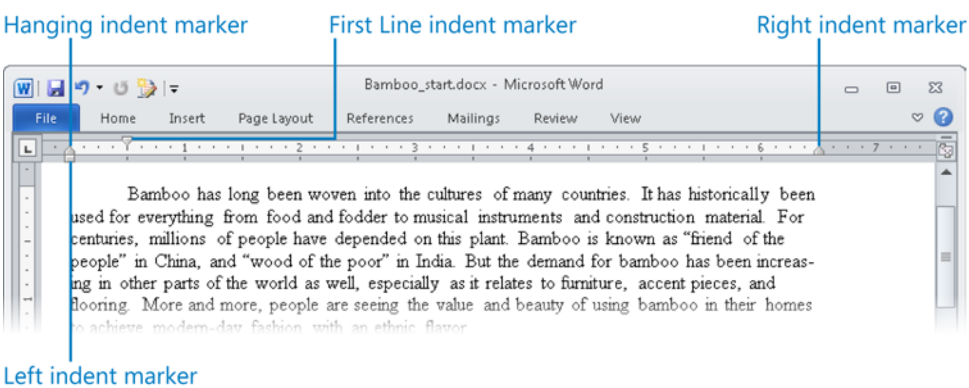
In Word, you don't define the width of paragraphs and the length of pages by defining the area occupied by the text; instead, you define the size of the white space—the left, right, top, and bottom margins—around the text.

> **See Also** For information about setting margins, see section 3.1, "Apply and Manipulate Page Setup Settings."

Although the left and right margins are set for a whole document or section, you can vary the position of the paragraphs between the margins. The quickest way to indent a paragraph from the left is to click the Increase Indent button; clicking the Decrease Indent button has the opposite effect. You cannot increase or decrease the indent beyond the margins.

Another way to control the indentation of lines is by dragging markers on the horizontal ruler to indicate where each line of text starts and ends.

- **First Line Indent** Begins a paragraph's first line of text at this marker
- **Hanging Indent** Begins a paragraph's second and subsequent lines of text at this marker at the left end of the ruler
- **Left Indent** Indents the text to this marker
- **Right Indent** Wraps the text when it reaches this marker at the right end of the ruler



See Also For information about displaying the ruler, see section 1.1, "Apply Different Views to a Document."

Setting a right indent indicates where the lines in a paragraph should end, but sometimes you might want to specify where only one line should end. For example, you might want to break a title after a particular word to make it look balanced on the page. You can end an individual line by inserting a text wrapping break (more commonly known as a *line break*). Word indicates the line break with a bent arrow.

Tip Inserting a line break does not start a new paragraph, so when you apply paragraph formatting to a line of text that ends with a line break, the formatting is applied to the entire paragraph, not just that line.

➤ **To change the indentation of selected paragraphs**

- ➜ On the **Home** tab, in the **Paragraph** group, click the **Increase Indent** or **Decrease Indent** button.
- ➜ On the **Page Layout** tab, in the **Paragraph** group, in the **Indent** area, increase or decrease the **Left** or **Right** settings.
- ➜ On the horizontal ruler, drag the **First Line Indent**, **Left Indent**, or **Right Indent** marker to the location you want.

Tip Left and right margin indents are often used to draw attention to special paragraphs, such as quotations.

➤ **To insert a line break**

1. Position the cursor where you want the break to occur.
2. On the **Page Layout** tab, in the **Page Setup** group, click the **Breaks** button, and then click **Text Wrapping**.

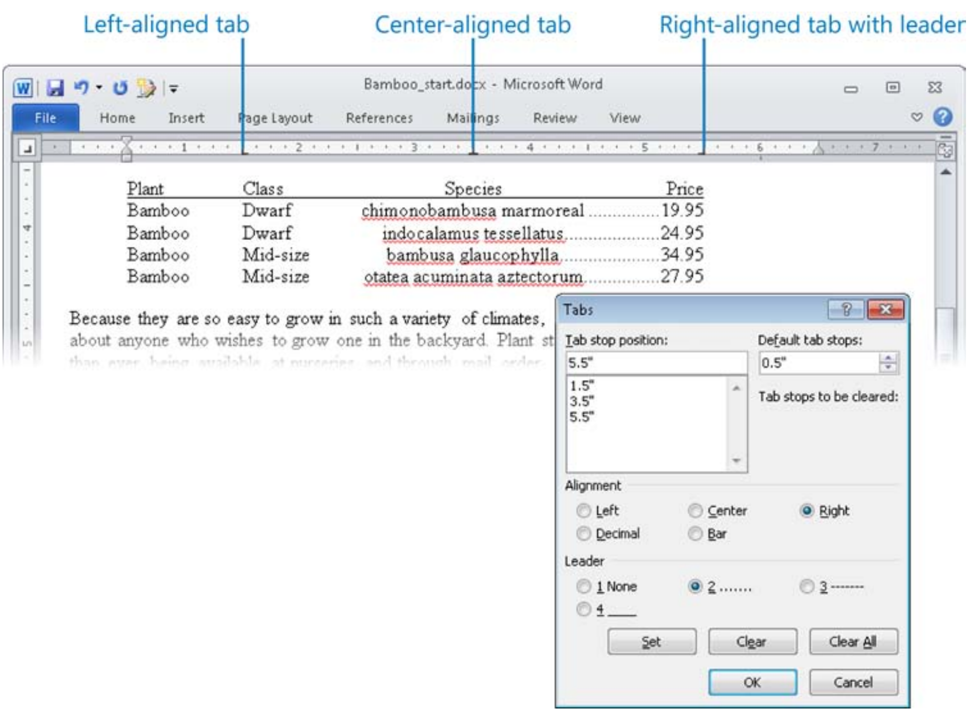
Setting Tab Stops

You can align text in different locations across the page by using tab stops. By default, Word sets left-aligned tab stops every half inch (or every 0.27 centimeters, if Word is set to display measurements in centimeters).

You can set the following types of tabs in any position between the left and right margins:

- **Left Tab** Aligns the left end of the text with the tab stop.
- **Center Tab** Aligns the center of the text with the tab stop.
- **Right Tab** Aligns the right end of the text with the tab stop.
- **Decimal Tab** Aligns the decimal point in the text with the tab stop.
- **Bar Tab** Inserts a vertical bar aligned with the tab stop in the paragraph containing the cursor.

You can set custom tab stops one at a time or set multiple tab stops at the same time in the Tabs dialog box. You also use this dialog box to specify tab leaders—visible marks such as dots or dashes connecting the text before the tab with the text after it.



➤ To set a custom tab stop

1. Click the **Tab** button located at the left end of the horizontal ruler until the type of tab stop you want appears.
2. Click the horizontal ruler where you want to set the tab stop.

   Or

1. On either the **Home** or **Page Layout** tab, click the **Paragraph** dialog box launcher.
2. At the bottom of the **Paragraph** dialog box, click **Tabs**.
3. In the **Tabs** dialog box, in the **Tab stop position** box, enter a measurement.
4. In the **Alignment** area, click the option you want, click **Set**, and then click **OK**.

➤ To change the position of an existing custom tab stop

➜ On the ruler, drag the tab stop to the left or right.

➜ In the **Tabs** dialog box, select the tab in the **Tab stop position** box, enter a new measurement in the **Tab stop position** box, click **Set**, and then click **OK**.

➤ To set a tab stop with a leader

1. In the **Tabs** dialog box, set a new tab stop or select an existing one.
2. In the **Leader** area, click the option you want, click **Set**, and then click **OK**.

➤ To delete a custom tab stop

➜ Drag the tab stop away from the ruler.

➜ In the **Tabs** dialog box, select the tab, click **Clear**, and then click **OK**.

➤ To clear all custom tab stops

➜ In the **Tabs** dialog box, click **Clear All**, and then click **OK**.

Practice Tasks

The practice files for these tasks are located in the Word\Objective2 practice file folder. If you want to save the results of the tasks, save them in the same folder with *My* appended to the file name so that you don't overwrite the original practice file.

- In the *Paragraphs* document, display nonprinting characters and the rulers. Insert a line break to the left of *Update* in the fourth line. Indent the first line of each of the paragraphs following the *Update* heading by a quarter of an inch. Finally, give all the paragraphs below *Esther Valle* left and right indents of half an inch.
- At the end of the *TabularList* document, enter the following, pressing Tab where indicated:

  Self Tab *Other People* Tab *Nature*

  Transformation Tab *Life/death* Tab *Weather*

  Time travel Tab *Telepathy* Tab *Oceans*

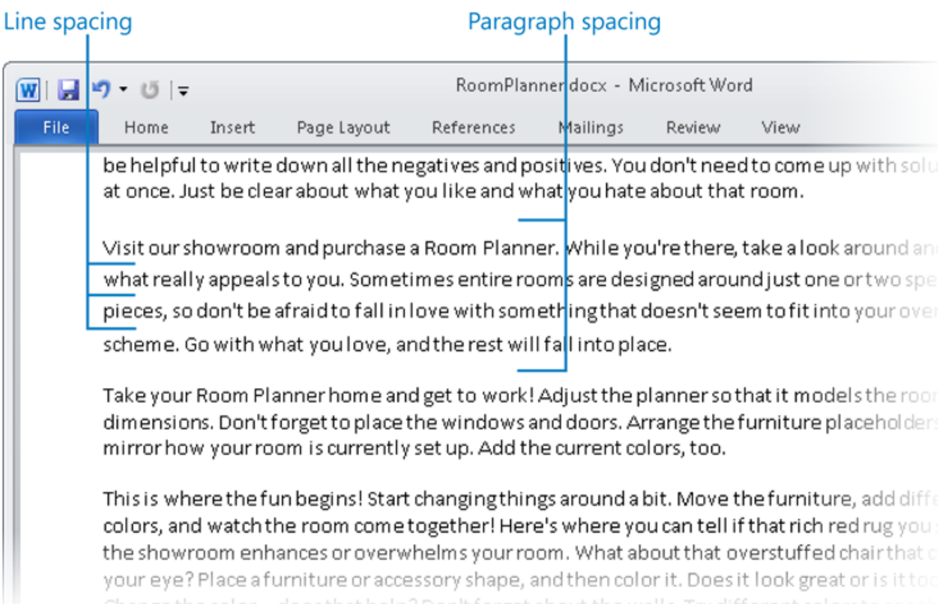
  Visible/invisible Tab *Mind control* Tab *Animals*

  Make the first line bold, and indent the entire list. Left-align the second column at the 2-inch mark on the horizontal ruler, and then right-align the third column at the 4-inch mark.
- In the *Tabs* document, for the *Date*, *Time*, *Location*, and *Ticket cost* paragraphs, set a left tab at the 2.5-inch mark and a decimal tab at the 4-inch mark.

2.4 Apply Spacing Settings to Text and Paragraphs

In documents based on the Normal document template, a normal paragraph has internal line spacing of 1.15 lines, and is followed by 10 points of blank space. You can change the look of a paragraph by changing the following:

- **Line spacing** You can adjust the spacing between the lines in a paragraph proportionally or by specifying an exact amount of space.
- **Paragraph spacing** To make it obvious where one paragraph ends and another begins, you can add space above or below, or both.



➤ **To change the line spacing of selected paragraphs**

1. On the **Home** tab, in the **Paragraph** group, click the **Line and Paragraph Spacing** button.
2. In the list, select the standard spacing option you want.

   Or

   In the list, click **Line Spacing Options**, change the setting under **Line spacing** on the **Indents and Spacing** page of the **Paragraph** dialog box, and then click **OK**.

➤ **To change the paragraph spacing of selected paragraphs**

→ On the **Page Layout** tab, in the **Paragraph** group, under **Spacing**, change the **Before** or **After** setting.

→ On the **Home** tab, in the **Paragraph** group, click the **Line and Paragraph Spacing** button, and then click **Add Space Before Paragraph**, **Remove Space Before Paragraph**, **Add Space After Paragraph**, or **Remove Space After Paragraph**. (Only two options will be visible, depending on the current Before and After settings of the active paragraph.)

Or

1. On the **Home** tab, click the **Paragraph** dialog box launcher.
2. On the **Indents and Spacing** page of the **Paragraph** dialog box, in the **Spacing** area, change the **Before** or **After** setting, and then click **OK**.

Practice Tasks

The practice files for these tasks are located in the Word\Objective2 practice file folder. If you want to save the results of the tasks, save them in the same folder with *My* appended to the file name so that you don't overwrite the original practice file.

- In the *RoomPlanner* document, change the line spacing of the text in the sidebar on page 2 so that two line spaces appear between the lines of text.
- In the *RoomPlanner* document, change the paragraph spacing of all the text in the main document so that the spacing between each paragraph is 12 points.
- In the *Paragraphs* document, change the spacing after all paragraphs to 12 points, and then remove the spacing after the *Date*, *Time*, *Location*, and *Ticket cost* paragraphs. Change the line spacing of the paragraph that begins *The author of* to 1.5.

2.5 Create Tables

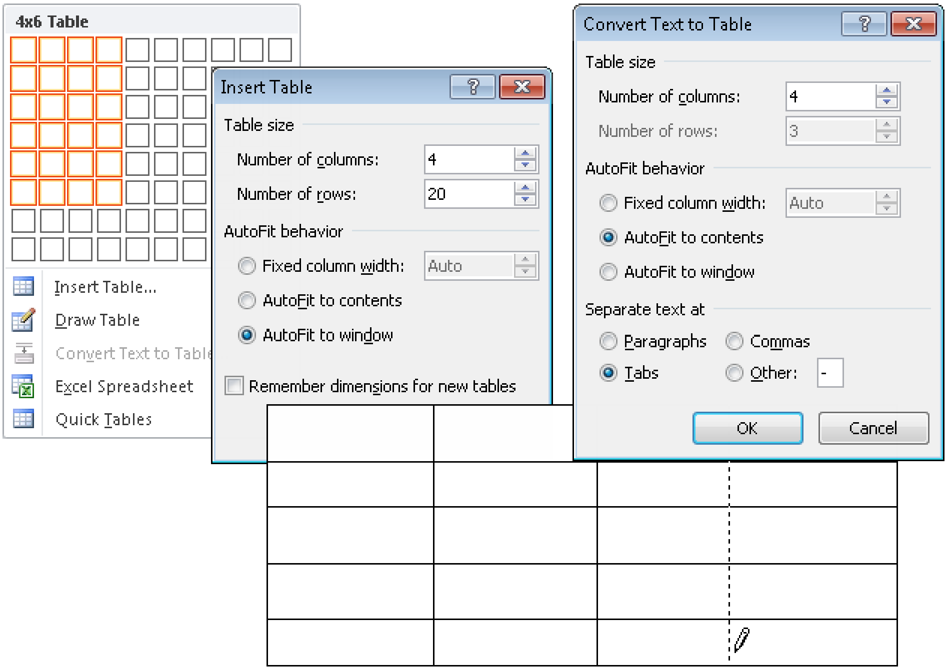
Creating Basic Tables

Numeric data can often be presented more efficiently in a table than in a paragraph of text. Tables make large amounts of data or more complex data easier to read and understand because the data can be structured in rows and columns, frequently with row and column headers.

You can create a table in several ways:

- Select the number of rows and columns you want from a grid to create a table that spans the text column with all the cells of equal size.
- Display the Insert Table dialog box and specify the number of rows and columns, as well as the size of the columns.
- Draw cells the size you want.
- Convert selected text to a table.

> **Tip** You can also insert existing data from a Microsoft Excel worksheet in a Word document, but the intricacies of using the Microsoft Office programs together are not likely to be tested on the Word certification exam.



Most people are accustomed to thinking of a table as a means of displaying data in a quick, easy-to-grasp format. But tables can also serve to organize your pages in creative ways. For example, suppose you want to display two tables side by side. The simplest way to do this is to first create a table with one tall row and two wide columns and no gridlines. You can then insert one table in the first cell and the other table in the second cell. These nested tables then seem to be arranged side by side.

Payment Schedule			Payment Schedule	
Interest Rate	3.6%		Interest Rate	5.0%
Years	3		Years	3
Loan Amount	$155,000.00		Loan Amount	$155,000.00
Monthly Payment	$4,548.69		Monthly Payment	$4,645.49
Cost of Loan	$163,752.79		Cost of Loan	$167,237.61
3-Year Lease Cost	$180,000.00		3-Year Lease Cost	$180,000.00
Savings	$16,247.21		Savings	$12,762.39

As with regular tables, you can create a nested table in one of three ways:

- From scratch
- By formatting existing information
- By inserting Excel data

And just like other tables, you can format a nested table either manually or by using one of the ready-made table styles.

> **Tip** You can use tables to organize a mixture of elements such as text, tables, charts, and diagrams.

➤ To insert a table

1. On the **Insert** tab, in the **Tables** group, click the **Table** button.
2. In the grid, move the pointer across and down to select the number of columns and rows you want, and then click the lower-right cell in the selection.

   Or

1. On the **Insert** tab, in the **Tables** group, click the **Table** button, and then click **Insert Table**.
2. In the **Insert Table** dialog box, in the **Table size** area, specify the number of columns and rows you want the table to include.

3. In the **AutoFit behavior** area, do one of the following:
   - Click **Fixed column width**, and then specify a standard width for the table columns.
   - Click **AutoFit to contents** to size the table columns to fit their contents. The width of the resulting table may be less than the width of the page.
   - Click **AutoFit to window** to create a table that fits within the page margins and is divided into columns of equal size.
4. In the **Insert Table** dialog box, click **OK**.

➤ **To draw a table**

1. On the **Insert** tab, in the **Tables** group, click the **Table** button, and then click **Draw Table**.
2. Drag the pointer (which has become a pencil) across and down to create a cell.
3. Point to a corner of the cell, and drag to create another cell, or draw column and row boundaries inside the first cell.
4. Press Esc to turn off the table drawing pointer.

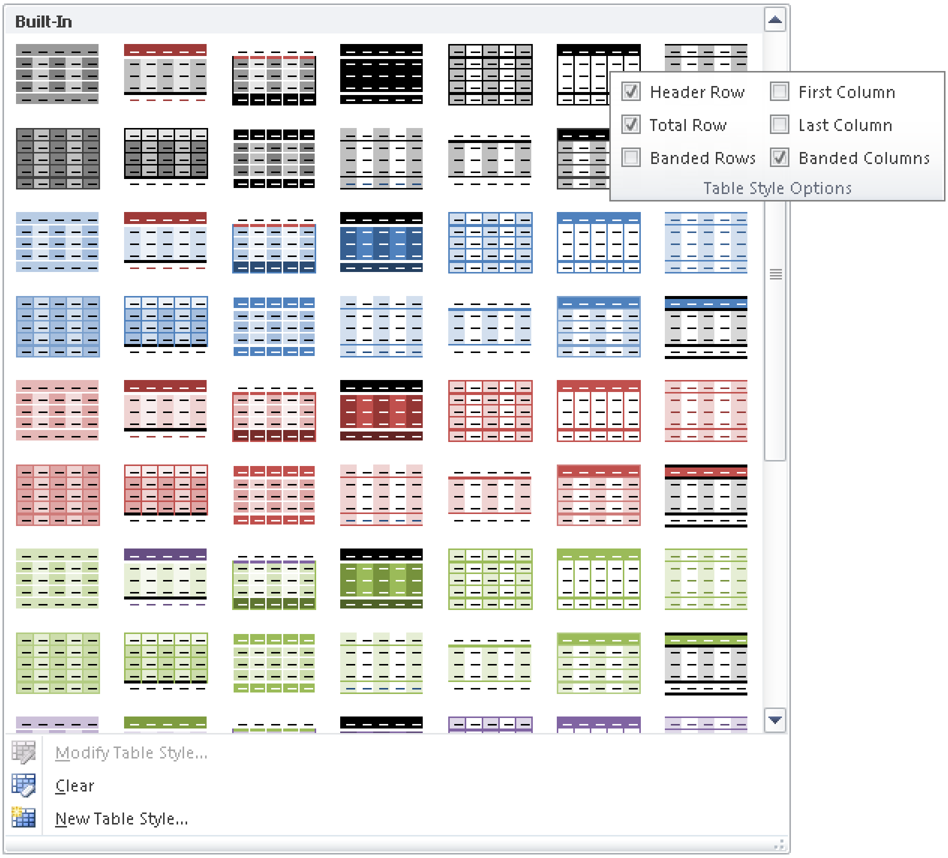
> **Tip** You can adjust an existing table by clicking the Draw Table button in the Draw Borders group on the Design tab. You can also change the style, weight, and color of the borders of drawn tables.

➤ **To convert selected text to a table**

1. On the **Insert** tab, in the **Tables** group, click the **Table** button, and then click **Convert Text to Table**.
2. In the **Convert Text to Table** dialog box, adjust the **Table size** and **AutoFit behavior** settings, select the type of text separator, and then click **OK**.

Formatting Tables

To format an existing table, you can apply one of the table styles available on the Table Tools Design contextual tab, which include a variety of borders, shading, text colors, and other attributes to give the table a professional look. The appearance of the built-in styles reflects the table elements selected in the Table Style Options group on the Design contextual tab.



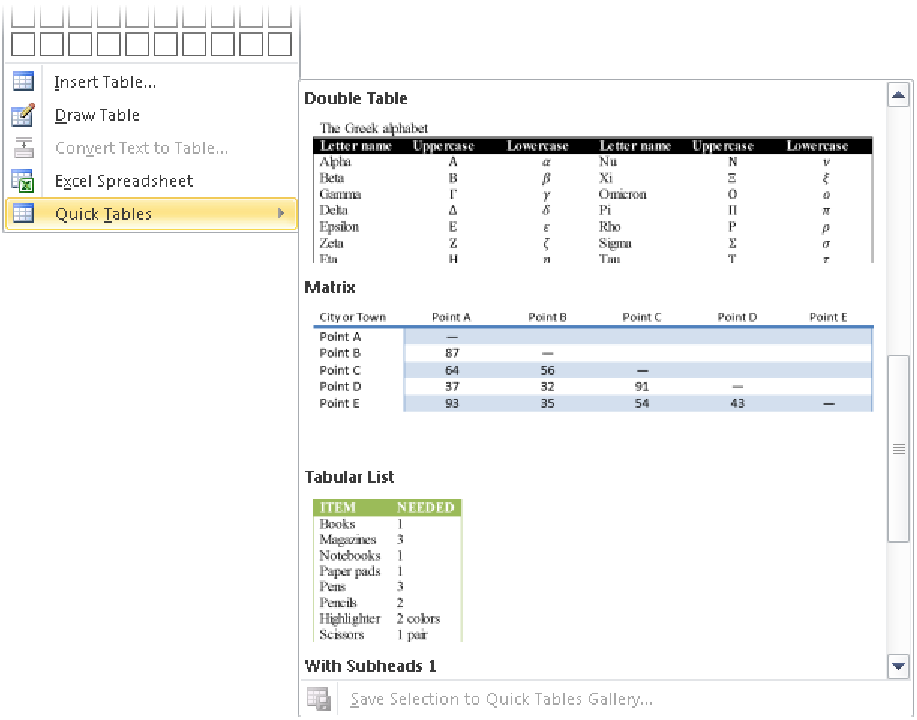
Tip You can click buttons in the Paragraph and Font groups of the Home tab and apply character formatting from the Styles gallery to tables, just as you would to format any text in a Word document.

➤ To apply a built-in table style

1. Click anywhere in the table you want to format.
2. On the Table Tools **Design** contextual tab, in the **Table Styles** gallery, click the built-in style you want to apply.

Inserting Preformatted Tables

Formatting a table to best convey its data is often a process of trial and error. You can get started by creating a Quick Table, a preformatted table with sample data that you can customize.



➤ To insert a Quick Table

1. On the **Insert** tab, in the **Tables** group, click the **Table** button, and then point to **Quick Tables**.
2. In the **Quick Tables** gallery, click the preformatted table you want to insert.

Practice Tasks

The practice file for these tasks is located in the Word\Objective2 practice file folder. If you want to save the results of the tasks, save them in the same folder with *My* appended to the file name so that you don't overwrite the original practice file.

- In the *Table* document, convert the tabular list beginning with *Distance* and ending with *$20.00* into a table with two columns and six rows.
- In a new document, create a Matrix Quick Table.
- In a document, draw a table half the width and one-quarter the height of the page. Divide the table into four columns and 6 rows. Then apply the Colorful Shading – Accent 3 table style.
- In a document, insert a table with four columns and five rows. Specify the width of each column as 1.0".

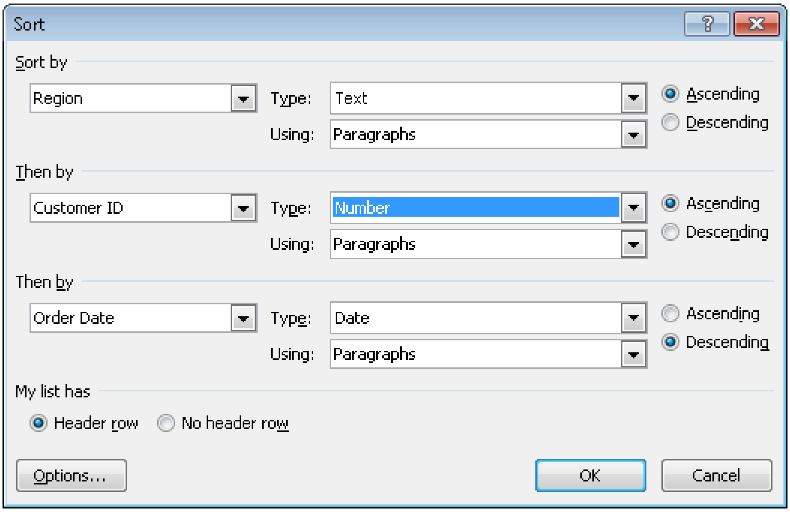
2.6 Manipulate Tables in a Document

Modifying Table Data

After creating a table, you can enter text, numbers, and graphics into its cells. You can edit the information as you would normal text.

You can sort the data within a table by the contents of any table column. If the table includes a header row and/or a total row and multiple data rows, Word sorts only the data rows.

Strategy **You should create a table with four or five columns and many rows of data and observe the effect of sorting the table with and without a header row to understand the sorting process.**



You can apply borders and shading to a table manually or select a built-in table style that reflects the current thematic elements of the document. When the edges of table cells are not visually differentiated by borders or other formatting, you can display nonprinting gridlines that define the edges of the table cells.

➤ To sort content in a table

1. Click anywhere in the table.
2. On the Table Tools **Layout** contextual tab, in the **Data** group, click the **Sort** button.
3. In the **Sort** dialog box, select the primary column by which you want to sort the content, and up to two additional nested sorting criteria. Then click **OK**.

➤ To specify a header row for a table

1. Click anywhere in the table.
2. On the Table Tools **Design** contextual tab, in the **Table Style Options** group, select the **Header Row** check box.

> **Tip** When you specify a header row, the built-in table styles change to visually differentiate the header from the rest of the table.

➤ To display gridlines in a table

1. Click anywhere in the table.
2. On the **Layout** contextual tab, in the **Table** group, click the **View Gridlines** button.

Modifying Table Structure

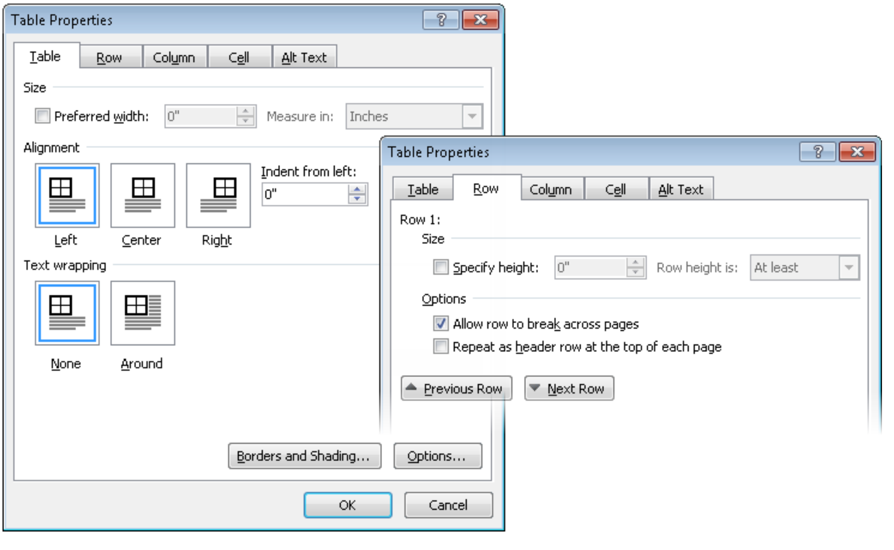
You can modify a table's structure at any time. To change the structure, you need to know how to select the appropriate parts of the table, as follows:

- **Select a table** Click anywhere in the table. On the Table Tools Layout contextual tab, in the Table group, click the Select button, and then click Select Table.
- **Select a column** Point to the top border of the column. When the pointer changes to a black, down-pointing arrow, click once.
- **Select a row** Point to the left border of the row. When the pointer changes to a white, right-pointing arrow, click once.
- **Select a cell** Triple-click the cell or click its left border.
- **Select multiple cells** Click the first cell, hold down the Shift key, and press the arrow keys to select adjacent cells in a column or row.

The basic methods for modifying table structure are as follows:

- Size the table, columns, or rows.
- Insert or delete rows, columns, or cells.
- Merge or split cells.

> **Tip** You can move a table by pointing to it and then dragging the handle that appears in its upper-left corner. Or click the handle to select the table, and then use the Cut and Paste buttons in the Clipboard group on the Home tab to relocate the table.



From the Table Properties dialog box, you can control many aspects of a table's structure, including the following:

- Specify the preferred width of the entire table, as well as the way it interacts with the surrounding text.
- Specify the height of each row, whether a row is allowed to break across pages, and whether a row of column headers should be repeated at the top of each page.

> **Tip** The Repeat As Header Row… option is available only if the cursor is in the top row of the table. You can also set repeating headers by clicking the Repeat Header Rows button in the Data group on the Layout tab.

- Set the width of each column. Setting the width of a cell also sets the width for its column.

> **Tip** You can also control the widths of selected cells and their columns by changing the Table Column Width setting in the Cell Size group on the Layout tab.

- Set the horizontal and vertical alignment of text within cells.

> **Tip** You can also control the alignment of cell text by clicking buttons in the Alignment group on the Layout tab.

- Control the margins of cells (how close text comes to the cell border) by clicking the Options button on either the Table or Cell page.

> **Tip** You can also control the margins by clicking the Cell Margins button in the Alignment group on the Layout tab.

➤ To display the Table Properties dialog box

1. Click anywhere in the table, or select a row, a column, or the table.
2. On the Table Tools **Layout** contextual tab, in the **Table** group, click the **Properties** button.

➤ To change the size of a selected table

➜ Drag the size handle in the lower-right corner of the table.

➤ To change the width of a selected column

- ➜ Drag a column's right border to the left or right.
- ➜ Drag the column's **Move Table Column** marker on the horizontal ruler to the left or right.
- ➜ On the **Layout** contextual tab, in the **Cell Size** group, change the **Table Column Width** setting.

➤ To change the height of a selected row

- ➜ Drag a row's bottom border up or down.
- ➜ Drag the row's **Adjust Table Row** marker on the vertical ruler up or down.
- ➜ On the **Layout** contextual tab, in the **Cell Size** group, change the **Table Row Height** setting.

➤ To insert columns or rows

1. Click anywhere in the column or row adjacent to which you want to add a single column or row, or select the number of columns or rows you want to insert.
2. On the **Layout** contextual tab, in the **Rows & Columns** group, click an **Insert** button.

➤ To insert cells

1. Click the cell adjacent to which you want to add a single cell, or select the number of cells you want to insert.
2. On the **Layout** contextual tab, click the **Rows & Columns** dialog box launcher.
3. In the **Insert Cells** dialog box, specify how adjacent cells should be moved to accommodate the new cell or cells, and then click **OK**.

➤ To delete a table, columns, or rows

1. Click anywhere in the table, column, or row you want to delete, or select the number of columns or rows you want to delete.
2. On the **Layout** contextual tab, in the **Rows & Columns** group, click the **Delete** button.
3. Click **Delete Columns**, **Delete Rows**, or **Delete Table**.

➤ To delete cells

1. Click the cell, or select the number of cells you want to delete.
2. On the **Layout** contextual tab, in the **Rows & Columns** group, click the **Delete** button, and then click **Delete Cells**.
3. In the **Delete Cells** dialog box, specify how adjacent cells should be moved to replace the deleted cell or cells, and then click **OK**.

➤ **To merge or split selected cells**

➜ On the **Layout** contextual tab, in the **Merge** group, click the **Merge Cells** button.

➜ On the **Layout** contextual tab, in the **Merge** group, click the **Split Cells** button.

➤ **To convert a table to text**

1. Click anywhere in the table.
2. On the **Layout** contextual tab, in the **Data** group, click the **Convert to Text** button.
3. In the **Convert Table to Text** dialog box, do one of the following, and then click **OK**:
   - Click **Paragraph marks**, **Tabs**, or **Commas** to separate the content of table cells with one of these standard elements.
   - Click **Other**, and then enter any single character in the **Other** box to separate the content of table cells with that character.

Practice Tasks

The practice files for these tasks are located in the Word\Objective2 practice file folder. If you want to save the results of the tasks, save them in the same folder with *My* appended to the file name so that you don't overwrite the original practice file.

- In the *SortTable* document, sort the table in ascending order by State, then by City, and then by Last Name.
- In the *ModifyTable* document, merge the cells in the first row of the Estimate table. Add two rows below the last row. Then adjust the size of the entire table until its right edge aligns with the 4-inch mark on the horizontal ruler.
- In the *ModifyTable* document, expand the height of the header row of the Estimate table to 0.4", and then center align the contents.
- In the *ModifyTable* document, convert the Consultation Fee Schedule table to text, with the column contents separated by tabs.

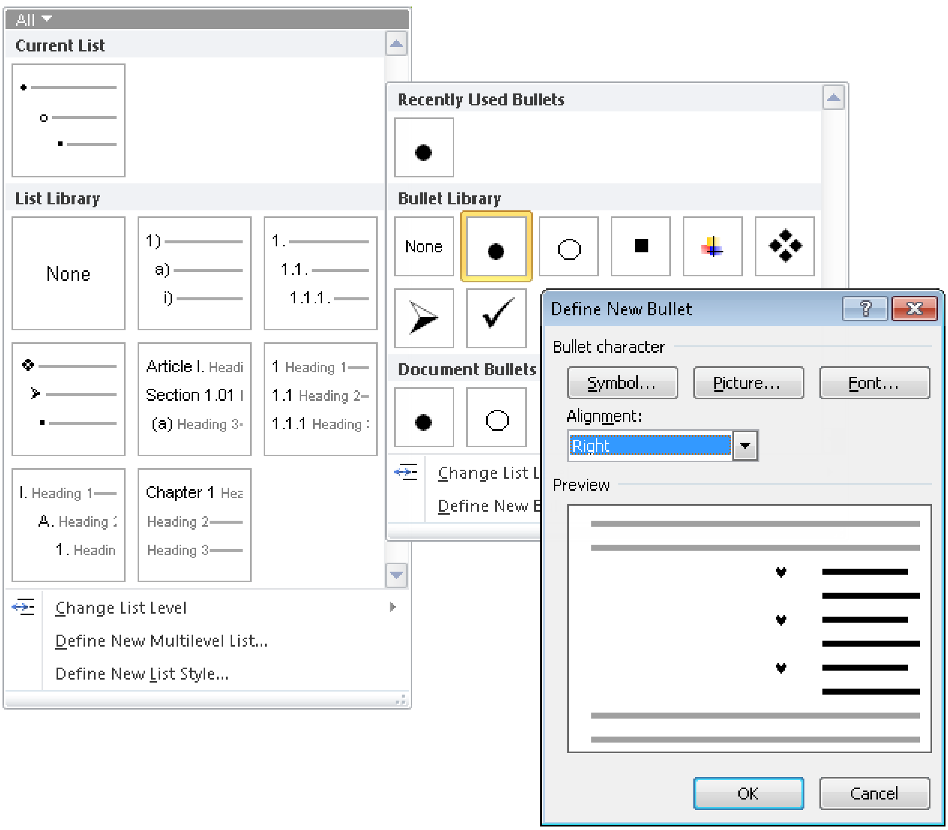
2.7 Apply Bullets to a Document

You can use lists to clearly present a set of related items in a document. When the order of the items is not important, use a bulleted list.

You can create a single-level or multilevel bulleted list by selecting a bulleted list style and then typing the list, or by typing the list and then applying the style.

After you create a bulleted list, you can modify, format, and customize the list as follows:

- Move items up or down, insert new items, or delete unwanted items.
- Sort list items in ascending or descending order.
- Change the bullet character to a standard symbol or to a picture.
- Change the overall indentation of the entire list or change the relationship of the first "outdented" line to the other lines.
- Change the level of items in a multilevel list.



Strategy The precise formatting of bulleted lists depends on the interplay of settings in their respective galleries as well as paragraph formatting and the location of tab stops. You should create multiple lists, show paragraph marks, and experiment with various settings, observing their effects.

➤ To create a bulleted list

1. Enter the list items as separate paragraphs, and then select the paragraphs.
2. On the **Home** tab, in the **Paragraph** group, click the **Bullets** button.

   Or

1. Type ***** (an asterisk) at the beginning of a paragraph, press the Spacebar or the Tab key, type the first item in the list, and then press Enter.
2. Type items and press Enter to add subsequent bulleted items.
3. To end the list, do one of the following:
   - Press Enter twice to start the next paragraph at the left margin.
   - Press Enter and then Backspace to indent the next paragraph at the same level as the list.

➤ To change the level of a selected bulleted list

1. On the **Home** tab, in the **Paragraph** group, click the **Bullets** arrow, and then click **Change List Level**.
2. In the **Change List Level** gallery, click the level you want.

➤ To change the level of a list item

➜ With the cursor in the item, on the **Home** tab, in the **Paragraph** group, click the **Increase Indent** button to demote the item or the **Decrease Indent** button to promote the item.

➤ To sort bulleted list items

1. Select the list items you want to sort.
2. On the **Home** tab, in the **Paragraph** group, click the **Sort** button.

➤ To change the bullet symbol

1. Click anywhere in the list you want to format.
2. On the **Home** tab, in the **Paragraph** group, click the **Bullets** arrow and then, in the **Bullets** gallery, click the symbol you want to use.

   Or

1. Click anywhere in the list you want to format.
2. On the **Home** tab, in the **Paragraph** group, click the **Bullets** arrow, and then click **Define New Bullet**.

3. In the **Define New Bullet** dialog box, do one of the following, and then click **OK**:
   - Click the **Symbol** button. In the **Symbol** dialog box, locate and click the bullet symbol you want to use, and then click **OK**.
   - Click the **Picture** button. In the **Picture Bullet** dialog box, locate and click the bullet graphic you want to use, and then click **OK**.

➤ **To turn automatic bulleted list formatting on or off**

1. On the **Proofing** page of the **Word Options** dialog box, in the **AutoCorrect options** section, click the **AutoCorrect Options** button.
2. On the **AutoFormat As You Type** page of the **AutoCorrect Options** dialog box, select or clear the **Automatic bulleted lists** check box, and then click **OK**.
3. In the **Word Options** dialog box, click **OK**.

Practice Tasks

The practice file for these tasks is located in the Word\Objective2 practice file folder. If you want to save the results of the tasks, save them in the same folder with *My* appended to the file name so that you don't overwrite the original practice file.

- In the *Lists* document, convert the paragraphs under each of the bold headings except *The Sequence of Events* to a bulleted list that uses the four-diamond bullet character.
- In the *Lists* document, convert the paragraphs under the heading *The Sequence of Events* to a numbered list with the *A. B. C.* format.

Objective Review

Before finishing this chapter, ensure that you have mastered the following skills:

2.1 Apply Font and Paragraph Attributes
2.2 Navigate and Search Through a Document
2.3 Apply Indentation and Tab Settings to Paragraphs
2.4 Apply Spacing Settings to Text and Paragraphs
2.5 Create Tables
2.6 Manipulate Tables in a Document
2.7 Apply Bullets to a Document

3 Applying Page Layout and Reusable Content

The skills tested in this section of the Microsoft Office Specialist exam for Microsoft Word 2010 relate to creating a document that has a professional, consistent appearance. Specifically, the following objectives are associated with this set of skills:

3.1 Apply and Manipulate Page Setup Settings
3.2 Apply Themes
3.3 Construct Content in a Document by Using the Quick Parts Tool
3.4 Create and Manipulate Page Backgrounds
3.5 Create and Modify Headers and Footers

You can modify the structure of a document in many ways, including changing the page setup, manipulating page breaks, formatting content in columns, and inserting content in text boxes. You can modify the appearance of a document by applying themes, displaying watermarks, formatting the page background, and configuring page headers and footers.

This chapter guides you in studying ways of formatting a document by working with the page setup settings, applying themes, using Quick Parts, adding page backgrounds, and adding headers and footers.

> **Practice Files** Before you can complete the practice tasks in this chapter, you need to copy the book's practice files to your computer. The practice files you'll use to complete the tasks in this chapter are in the Word\Objective3 practice file folder. A complete list of practice files is provided in "Using the Book's Companion Content" at the beginning of this book.

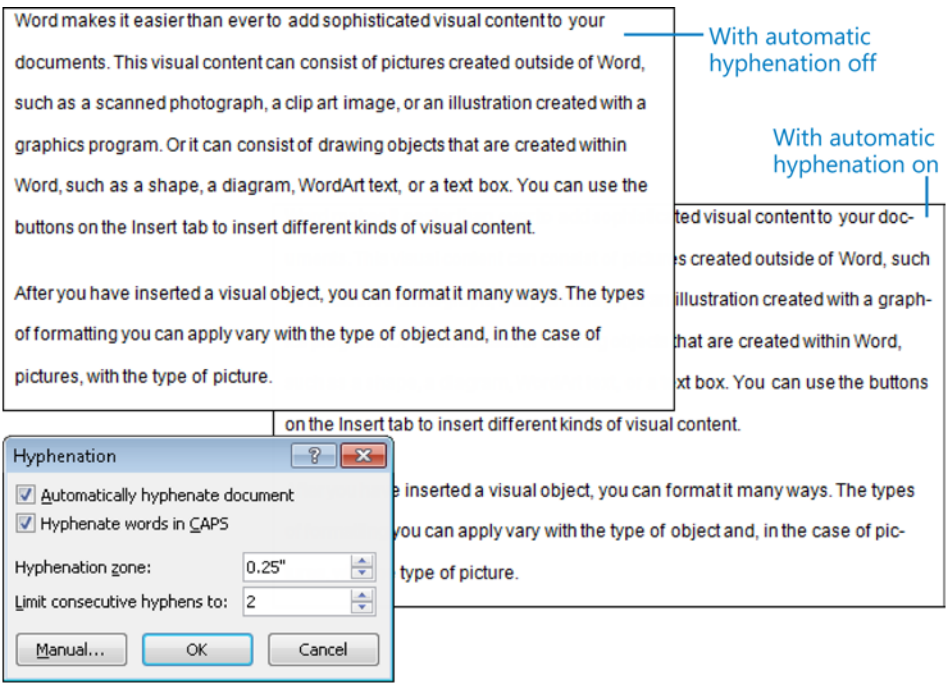
3.1 Apply and Manipulate Page Setup Settings

Controlling Page Settings

Word gives you control of the layout of the pages in a document. You can change the page size, margins, and orientation by clicking the buttons in the Page Setup group on the Page Layout tab. (You can also make the same changes on the Print page of the Backstage view.) All pages of a document have the same margins and are oriented the same way unless you divide the document into sections. Then each section can have independent margin and orientation settings.

> **See Also** For information about changing document layout by using tables, see section 2.5, "Create Tables." For information about changing document layout by using Quick Parts, see section 3.3, "Construct Content in a Document by Using the Quick Parts Tool."

When the automatic hyphenation feature is turned on, Word inserts line breaks and hyphens within words to help achieve a more uniform line length. You can control the way Word hyphenates words, from the Hyphenation dialog box.



When the automatic hyphenation feature is turned off, Word breaks lines between words and after punctuation. You can stop Word from breaking a line between two words that you want to keep together by inserting a nonbreaking space between the words.

➤ To change the page margins

1. On the **Page Layout** tab, in the **Page Setup** group, click the **Margins** button.
2. In the **Margins** gallery, click the standard margin set you want.

   Or

   Click **Custom Margins**, specify settings on the **Margins** page of the **Page Setup** dialog box, and then click **OK**.

➤ To insert a nonbreaking space

➜ Press Ctrl+Shift+Space.

Or

1. On the **Insert** tab, in the **Symbols** group, click the **Symbol** button, and then click **More Symbols**.
2. On the **Special Characters** page of the **Symbol** dialog box, click **Nonbreaking Space**, and then click **Insert**.

➤ To automatically break lines and hyphenate words

➜ On the **Page Layout** tab, in the **Page Setup** group, click the **Hyphenation** button, and then click **Automatic**.

➤ To control hyphenation settings

1. On the **Page Layout** tab, in the **Page Setup** group, click the **Hyphenation** button, and then click **Hyphenation Options**.
2. In the **Hyphenation** dialog box, specify whether you want Word to automatically hyphenate the document or to hyphenate uppercase words, the maximum distance of a hyphen from the document margin (the hyphenation zone), and how many consecutive lines of a paragraph may be hyphenated. Then click **OK**.

➤ To turn off automatic hyphenation

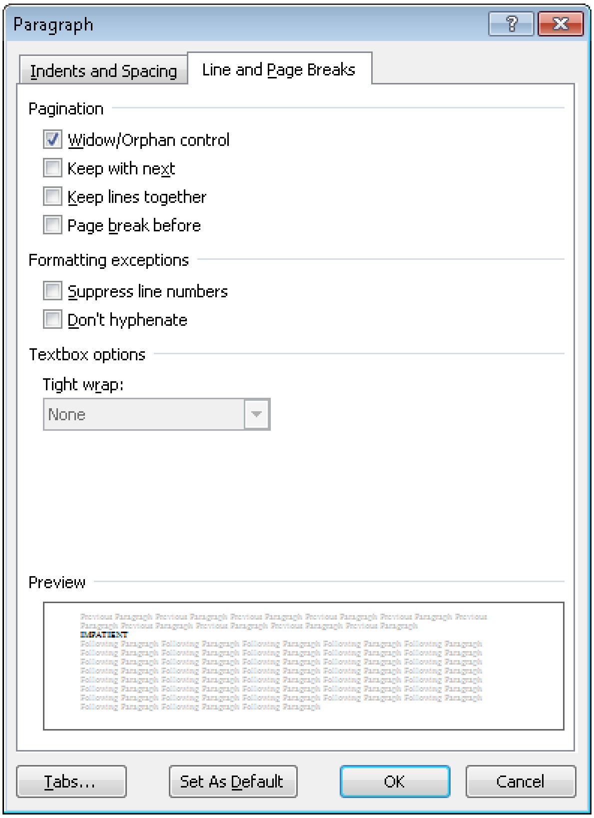
➜ On the **Page Layout** tab, in the **Page Setup** group, click the **Hyphenation** button, and then click **None**.

➤ To selectively hyphenate words in a document

1. On the **Page Layout** tab, in the **Page Setup** group, click the **Hyphenation** button, and then click **Manual**.
2. For each hyphenation suggested in the **Manual Hyphenation** dialog box, click **Yes** or **No**.

Setting Page Breaks

When you add more content than will fit within the document's top and bottom margins, Word creates a new page by inserting a soft page break (a page break that changes based on the content). If you want to control how pages break, you can insert a manual page break. You can also control whether related paragraphs stay together or can be separated by a page break, and you can specify that a particular paragraph start on a new page.



> **Tip** You can apply these options to individual paragraphs, or you can incorporate them into the styles you define for document elements such as headings.

➤ To insert a page break

- ➜ On the **Insert** tab, in the **Pages** group, click the **Page Break** button.
- ➜ On the **Page Layout** tab, in the **Page Setup** group, click the **Insert Page and Section Breaks** button, and then in the list, click **Page**.
- ➜ Press Ctrl+Enter.

➤ **To delete a page break**

1. Display the document in **Draft** view, and then display nonprinting characters.

> **Tip** To display nonprinting characters, click the Show/Hide ¶ button in the Paragraph group on the Home tab.

2. Select the page break, and then press Delete.

➤ **To force a page break before a paragraph**

1. Right-click anywhere in the paragraph, and then click **Paragraph**.
2. On the **Line and Page Breaks** page of the **Paragraph** dialog box, in the **Pagination** area, select the **Page break before** check box. Then click **OK**.

> **Tip** If a page break should always appear before a particular type of paragraph, such as a heading, you can incorporate the Page Break Before setting into the paragraph's style.

➤ **To keep related paragraphs together**

➜ On the **Line and Page Breaks** page of the **Paragraph** dialog box, in the **Pagination** area, select the **Keep with next** check box. Then click **OK**.

➤ **To keep all the lines of a paragraph together**

➜ On the **Line and Page Breaks** page of the **Paragraph** dialog box, in the **Pagination** area, select the **Keep lines together** check box. Then click **OK**.

➤ **To avoid one line of a paragraph appearing on the page**

➜ On the **Line and Page Breaks** page of the **Paragraph** dialog box, in the **Pagination** area, select the **Widow/Orphan control** check box. Then click **OK**.

➤ **To insert a blank page anywhere in a document**

➜ On the **Insert** tab, in the **Pages** group, click the **Blank Page** button.

Setting Section Breaks

In addition to controlling pagination with page breaks and paragraph formatting, you can control it with section breaks. A section break identifies a part of the document to which you can apply page settings, such as orientation or margins, that are different from those of the rest of the document.

Simple Room Design¶

With the Room Planner, you'll never make another design mistake. Created by acclaimed interior designers to simplify the redecorating process, this award-winning planning tool incorporates elements of color, dimension, and style to guide your project. It includes a furniture location guide; room grid; drawing tools; and miniature furniture, rugs, accessories, and color swatches that match our large in-store selection. Here's how to use the planner to create the room of your dreams!¶

¶ Section Break (Continuous)

Take a look at how your home is decorated and notice the things you like and dislike. Pay special attention to the color scheme and to how you react to each room. Is it inviting? Does it feel comfortable? Does it relax you or does it invigorate you?¶

Focus on the room(s) you would most like to change. Brainstorm all the things you would change in that room if you could. Don't think about to place the windows and doors. Arrange the furniture placeholders to mirror how your room is currently set up. Add the current colors, too.¶

This is where the fun begins! Start changing things around a bit. Move the furniture, add different colors, and watch the room come together! Here's where you can tell if that rich red rug you saw in the showroom enhances or overwhelms your room. What not quite sure, go back to your planner for a few more adjustments. If you are sure, go back to the store one more time to see if anything else catches your eye. Then make your purchases. You're almost there!¶

NOTE: If you decided to paint your room, do that before your new pieces are delivered. You'll want to start enjoying your new room as soon as your purchases arrive.¶

The following types of section breaks are available:

- **Next Page** This break starts the following section on the next page.
- **Continuous** This break creates a new section without affecting page breaks.
- **Even Page** This break starts the following section on the next even-numbered page.
- **Odd Page** This break starts the following section on the next odd-numbered page.

➤ To insert a section break

➜ On the **Page Layout** tab, in the **Page Setup** group, click the **Insert Page and Section Breaks** button, and in the **Section Breaks** area, click the type of section break you want.

➤ To specify different page settings for part of a document

1. Select the part of the document that will have different settings.
2. On the **Page Layout** tab, in the **Page Setup** group, click the **Insert Page and Section Breaks** button, and in the **Section Breaks** area, click the type of section break you want.
3. Click anywhere between the top and bottom section breaks, and change the page settings.

➤ To specify a different header or footer for a section

1. Display the document in Print Layout view, and then double-click a header or footer in the section you want to configure.
2. In the active header or footer area, enter the header or footer content you want to display for the current section.

➤ **To delete a section break**

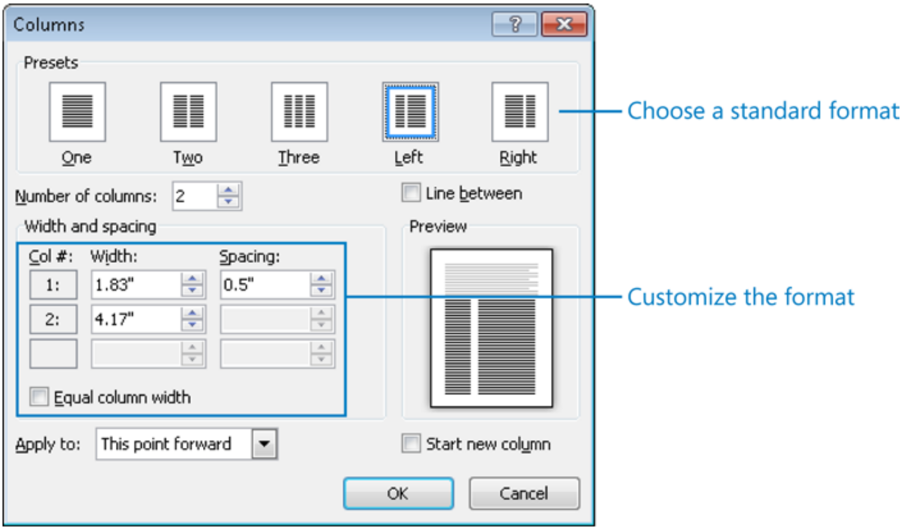
1. Display the document in Draft view, and then display nonprinting characters.
2. Click to the left of the section break, and then press Delete.

Flowing Text in Columns

By default, Word displays text in one column, but you can specify that text be displayed in multiple columns to create layouts like those used in newspapers and magazines. When you format text to flow in columns, the text fills the first column and then moves to the top of the next column. You can insert a column break to force text to move to the next column.

> **Tip** You can align the text in columns the same way you would any text. If you justify the columns for a neater look, you might want to have Word hyphenate the text to ensure that there are no large gaps between words.

You have the choice of one, two, or three equal columns, or two other two-column formats: one with a narrow left column and the other with a narrow right column. No matter how you set up the columns initially, you can change the layout, the widths of the individual columns, and the division between the columns at any time from the Columns dialog box.



➤ **To format an entire document in multiple columns**

➜ With the cursor anywhere in the text, on the **Page Layout** tab, in the **Page Setup** group, click the **Columns** button, and then click the number of columns you want.

➤ **To format part of a document in multiple columns**

1. Select the text you want to appear in columns.
2. On the **Page Layout** tab, in the **Page Setup** group, click the **Columns** button, and then click the number of columns you want.

➤ **To change the width of columns**

1. Click anywhere in any column. Then on the **Page Layout** tab, in the **Page Setup** group, click the **Columns** button, and click **More Columns**.
2. In the **Columns** dialog box, do the following, and then click **OK**:
   - Clear the **Equal Column Width** check box.
   - In the **Width and spacing area**, change the **Width** dimensions or the **Spacing** dimensions.

➤ **To display lines between columns**

➜ In the **Columns** dialog box, select the **Line between** check box.

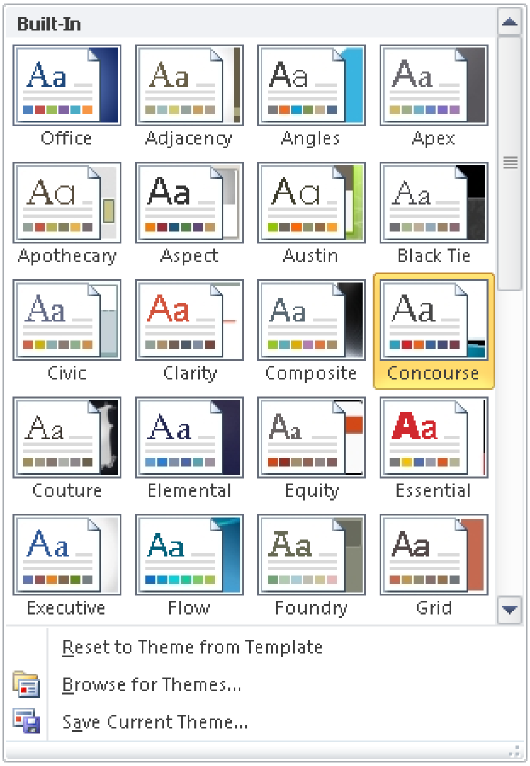
Practice Tasks

The practice files for these tasks are located in the Word\Objective3 practice file folder. If you want to save the results of the tasks, save them in the same folder with *My* appended to the file name so that you don't overwrite the original practice file.

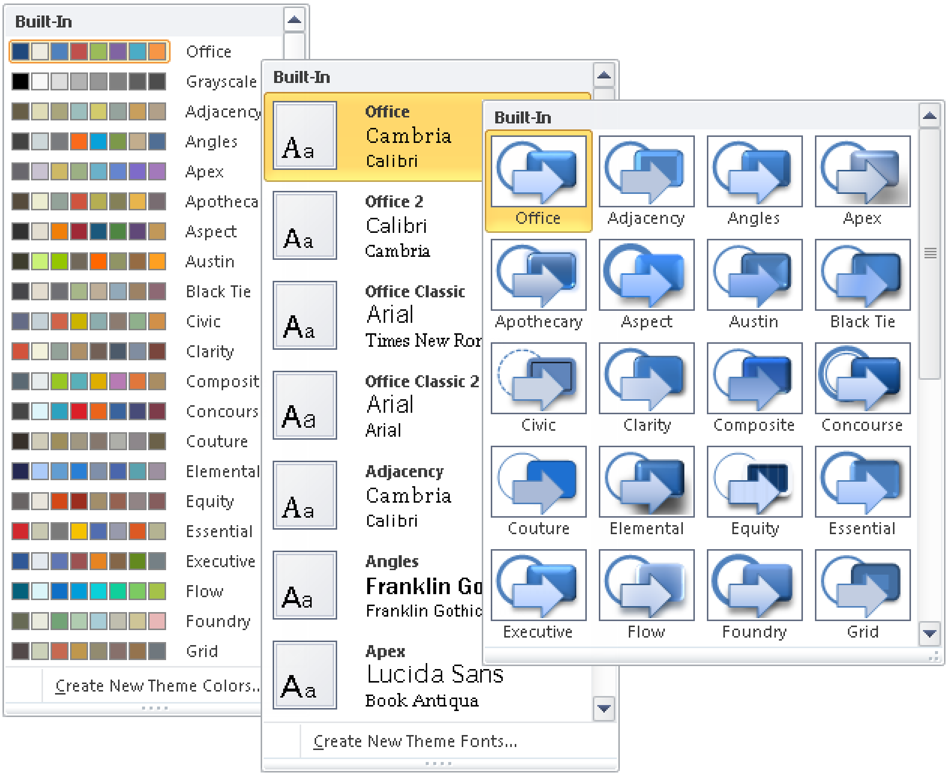
- In the *Pages* document, implement widow and orphan control for the entire document, and ensure that no paragraphs will be broken across pages.
- In the *Pages* document, insert a page break before the *Facilities* heading, and then ensure that the *To use the intercom from the office* heading will appear on the same page as the following two steps.
- In the *Pages* document, insert a Next Page section break before the *Shipping Quick Reference* heading, and set Wide margins for the new section.
- In the *Columns* document, change all but the first paragraph of the document to a three-column layout. Display a vertical line between the columns, and then hyphenate only the text within the columns.

3.2 Apply Themes

You can enhance the look of an entire document by applying a predefined theme—a combination of colors, fonts, and effects that project a certain feeling or tone. You apply a theme to the entire document from the Themes gallery.



If you like certain aspects of different themes (for example, the colors of one theme and the fonts of another), you can mix and match theme elements.



If you create a combination of theme elements that you would like to be able to use with other documents, you can save the combination as a new theme. By saving the theme in the default Document Themes folder, you make the theme available in the Themes gallery.

➤ To apply a theme

1. On the **Page Layout** tab, in the **Themes** group, click the **Themes** button.
2. In the **Themes** gallery, click the theme you want.

➤ To change the theme colors, fonts, or effects

1. On the **Page Layout** tab, in the **Themes** group, click the **Theme Colors**, **Theme Fonts**, or **Theme Effects** button.
2. In the corresponding gallery, click the color scheme, font set, or combination of effects you want.

➤ To create a new color scheme

1. Apply the color scheme that is closest to the one you want.
2. On the **Page Layout** tab, in the **Themes** group, click the **Theme Colors** button, and then click **Create New Theme Colors**.
3. In the **Create New Theme Colors** dialog box, click the box to the right of the presentation element you want to change.
4. In the color palette that appears, do one of the following:
   - Click the color you want to apply to the selected element.
   - At the bottom of the palette, click **More Colors**. Then, on either the **Standard** page or the **Custom** page of the **Colors** dialog box, click the color you want, and click **OK**.
5. Enter a name for the color scheme in the **Name** box, and then click **Save**.

➤ To create a new font set

1. Apply the font set that is closest to the one you want.
2. On the **Page Layout** tab, in the **Themes** group, click the **Theme Fonts** button, and then click **Create New Theme Fonts**.
3. In the **Create New Theme Fonts** dialog box, do the following:
   - In the **Heading font** list, click the font you want to use for all heading styles.
   - In the **Body font** list, click the font you want to use for all heading styles.
4. Enter a name for the font set in the **Name** box, and then click **Save**.

> **Tip** Custom themes, color schemes, and font sets are saved in the C:\Users\<*username*>\AppData\Roaming\Microsoft\Templates\Document Themes folder. To delete a custom theme, color scheme, or font set, navigate to the folder, right-click the item, and then click Delete.

➤ To save a modified theme

1. Adjust the colors, fonts, or effects of the current theme to suit your needs.
2. In the **Themes** gallery, click **Save Current Theme**.
3. In the **Save Current Theme** dialog box, enter a name for the theme in the **File name** box, and then click **Save**.

Practice Tasks

The practice files for these tasks are located in the Word\Objective3 practice file folder. If you want to save the results of the tasks, save them in the same folder with *My* appended to the file name so that you don't overwrite the original practice file.

- Apply the Aspect theme to the *Theme* document.
- In the *CustomTheme* document, change the color theme to Opulent and the font theme to Apex, and then save the combination as a custom theme with the name *MOS Design*.

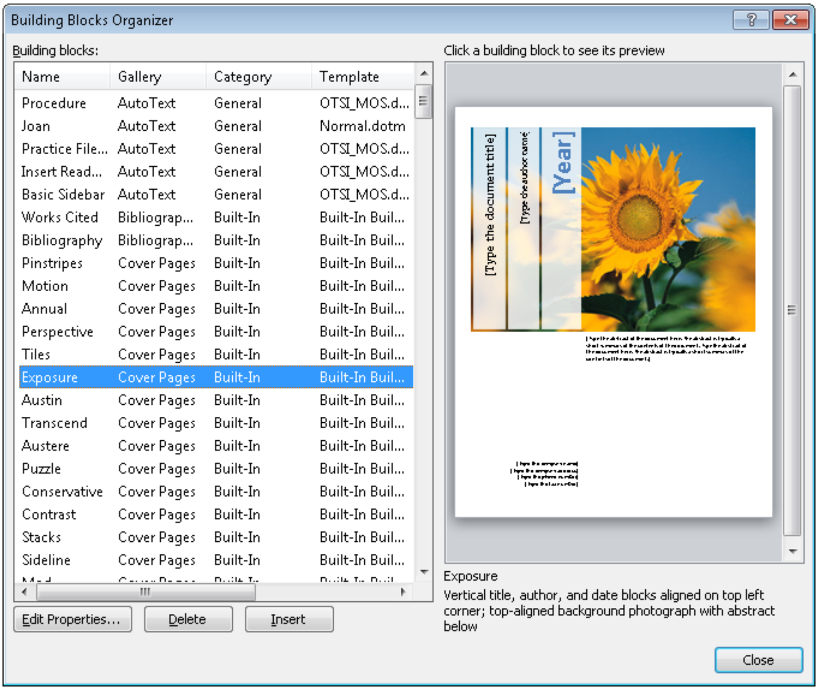
3.3 Construct Content in a Document by Using the Quick Parts Tool

Longer documents typically include elements such as a cover page and headers and footers to provide identifying and organizing information. To reinforce key concepts and also alleviate the monotony of page after page of plain text, they might also include elements such as sidebars and quotations pulled from the text.

To simplify the creation of professional-looking text elements, Word 2010 comes with ready-made visual representations of text, known as *Quick Parts* or *building blocks*. (The terms *Quick Parts* and *building blocks* seem to be used interchangeably in the Word program and documentation.)

Structural Quick Parts are listed in the Building Blocks Organizer. The Building Blocks Organizer includes Quick Parts for building bibliographies, cover pages, equations, footers, headers, page numbers, tables of contents, tables, text boxes (including sidebars and pull quotes), and watermarks.

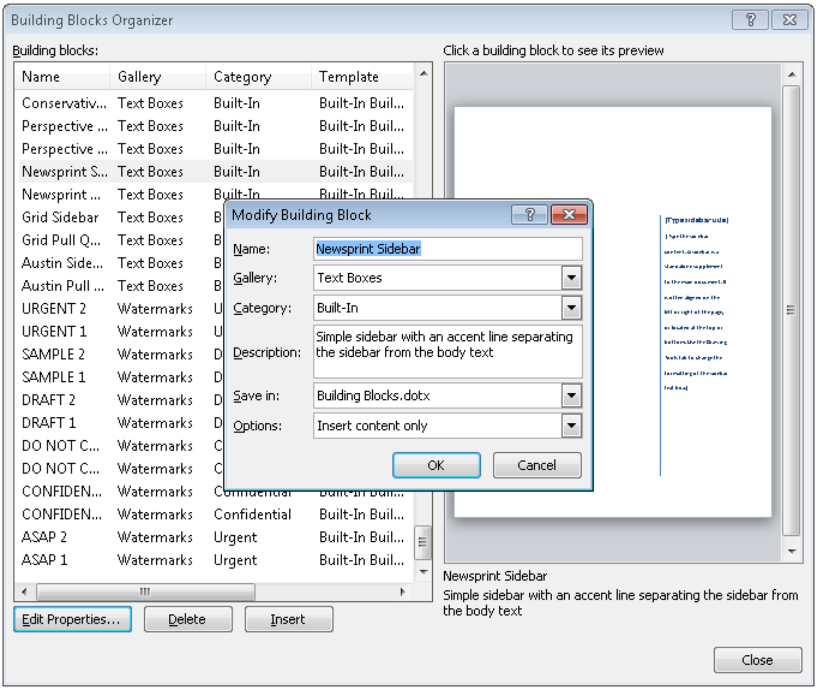
Clicking a Quick Part in the left pane of the Building Blocks Organizer displays a preview in the right pane.



The names of some Quick Parts indicate that they belong to a design family, such as Alphabet or Pinstripes. You can sort the list on any column—for example, you might want to sort the list by name to group all the Quick Parts by design family, so that you can preview the entire set before inserting them.

Strategy **Spend some time inserting Quick Parts in a test document and saving modified and new Quick Parts in various ways so that you understand the relationship between the Building Blocks Organizer and the Cover Page, Header, Footer, and Text Box galleries.**

More information about each Quick Part is available by scrolling the Building Blocks list horizontally. The Behavior column indicates whether Word inserts the building block in the existing text, in its own paragraph, or on its own page. The Description column includes information about the Quick Part, and in some cases, recommendations for its use. For an overview of a particular Quick Part, you can click Edit Properties.



In addition to the Quick Parts that are available from the Building Blocks Organizer, you can insert document properties and fields from the Quick Parts menu. Document properties that are inserted as Quick Parts update automatically when the property changes.

➤ To insert any Quick Part

1. On the **Insert** tab, in the **Text** group, click the **Quick Parts** button, and then click **Building Blocks Organizer**.
2. In the **Building Blocks Organizer**, select the Quick Part you want, and then click **Insert**.
3. In the document, replace any text placeholders in the Quick Part with the information you want to appear in the document.

> **Tip** After you insert a Quick Part, you can resize or reposition it or change its formatting by using commands on the Drawing Tools Format contextual tab.

➤ To insert a dynamic document property

➜ On the **Insert** tab, in the **Text** group, click the **Quick Parts** button, point to **Document Property**, and then click the property you want to insert.

➤ To insert a field

1. On the **Insert** tab, in the **Text** group, click the **Quick Parts** button, and then click **Field**.
2. In the **Field** dialog box, do the following, and then click **OK**:
   - In the **Field names** list, click the field you want to insert.
   - In the **Field properties** area, set any properties associated with the field.

➤ To insert a cover page

1. Position the insertion point at the beginning of the document.
2. On the **Insert** tab, in the **Pages** group, click the **Cover Page** button.
3. In the **Cover Page** gallery, click the design you want.
4. In the document, replace the text placeholders with the information you want to appear on the cover page.

See Also For information about inserting ready-made headers and footers, see section 3.5, "Create and Modify Headers and Footers."

Practice Tasks

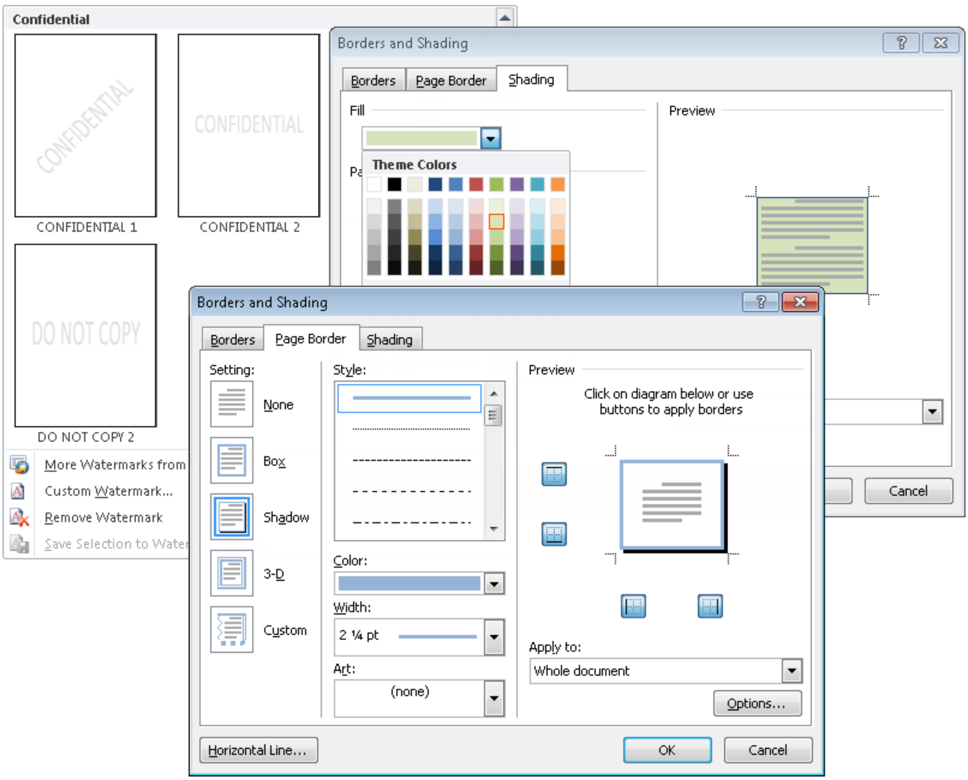
The practice files for these tasks are located in the Word\Objective3 practice file folder. If you want to save the results of the tasks, save them in the same folder with *My* appended to the file name so that you don't overwrite the original practice file.

- In the *Parts* document, insert a Pinstripes cover page. Change the subtitle placeholder to *Information Sheet* and the date placeholder to today's date.
- In the *Parts* document, on page 2, insert a Pinstripes Quote, and use Paste Special to insert an unformatted copy of the last sentence of the fourth paragraph (*Go with what you love*...) in the quote box. Then save the customized pull quote as a Quick Part with the name *Inspiration Quote*.
- In the *SavedText* document, select and save *Wide World Importers* as an AutoText Quick Part named *wwi*. Then in a new paragraph at the end of the document, type *Recommended by* and insert the *wwi* Quick Part.
- In the *SavedText* document, add a footer that includes only the Author, FileName, and SaveDate fields with their default formats and options.

3.4 Create and Manipulate Page Backgrounds

Whether you are creating a document that will be viewed on a printed page, on a computer, or in a web browser, you can make your document stand out by adding a page border, background color, or pattern. You can also add watermarks—faint words or a graphic that appear behind the text but don't interfere with its readability.

> **Tip** You can also add watermarks from the Building Blocks Organizer. For more information, see section 3.3, "Construct Content in a Document by Using the Quick Parts Tool."



➤ To add a page border

1. On the **Page Layout** tab, in the **Page Background** group, click the **Page Borders** button.
2. On the **Page Border** page of the **Borders and Shading** dialog box, under **Setting**, click the type of border you want.
3. To create a line border, make selections in the **Style**, **Color**, and **Width** lists. To create a patterned border, select the pattern you want from the **Art** list.

4. To apply or remove the border from a side of the diagram, in the **Preview** area, click any of the border buttons or any side of the preview diagram.
5. In the **Apply to** list, select the part of the document you want to apply the page border to: the whole document, the current section, or part of the current section.

> **See Also** For information about creating sections, see the "Setting Section Breaks" topic of section 3.1, "Apply and Manipulate Page Setup Settings."

6. To make adjustments to the border margin or position, click **Options**, set the margins, alignment, and positioning, and then click **OK**.
7. In the **Borders and Shading** dialog box, click **OK**.

➤ To add a page background color

1. On the **Page Layout** tab, in the **Page Background** group, click the **Page Color** button.
2. In the **Page Color** palette, click the background color you want.

   Or

1. In the **Page Color** palette, click **More Colors**.
2. On the **Standard** or **Custom** page of the **Colors** dialog box, make a selection, and then click **OK**.

➤ To add a page background pattern

1. In the **Page Color** palette, click **Fill Effects**.
2. In the **Fill Effects** dialog box, click the tab for the type of fill effect you want.
3. Click the options or thumbnails you want, and then click **OK**.

➤ To add a text watermark

1. On the **Page Layout** tab, in the **Page Background** group, click the **Watermark** button.
2. In the **Watermark** gallery, click the thumbnail for one of the predefined text watermarks.

   Or

1. In the **Watermark** gallery, click **Custom Watermark**.
2. In the **Printed Watermark** dialog box, click **Text watermark**.
3. Either select the watermark text you want from the **Text** list, or enter the text in the **Text** box.
4. Format the text by changing the settings in the **Font**, **Size**, and **Color** boxes.
5. Choose a layout, select or clear the **Semitransparent** check box, and then click **OK**.

➤ To use a picture as a watermark

1. In the **Watermark** gallery, click **Custom Watermark**.
2. In the **Printed Watermark** dialog box, click **Picture watermark**, and then click **Select Picture**.
3. In the **Insert Picture** dialog box, navigate to the folder where the picture is stored, and double-click the name of the picture.
4. In the **Scale** list, choose how big or small you want the watermark picture to appear in the document.
5. If you want to display a more vibrant picture, clear the **Washout** check box. Then click **OK**.

Practice Tasks

The practice file for these tasks is located in the Word\Objective3 practice file folder. If you want to save the results of the tasks, save them in the same folder with *My* appended to the file name so that you don't overwrite the original practice file.

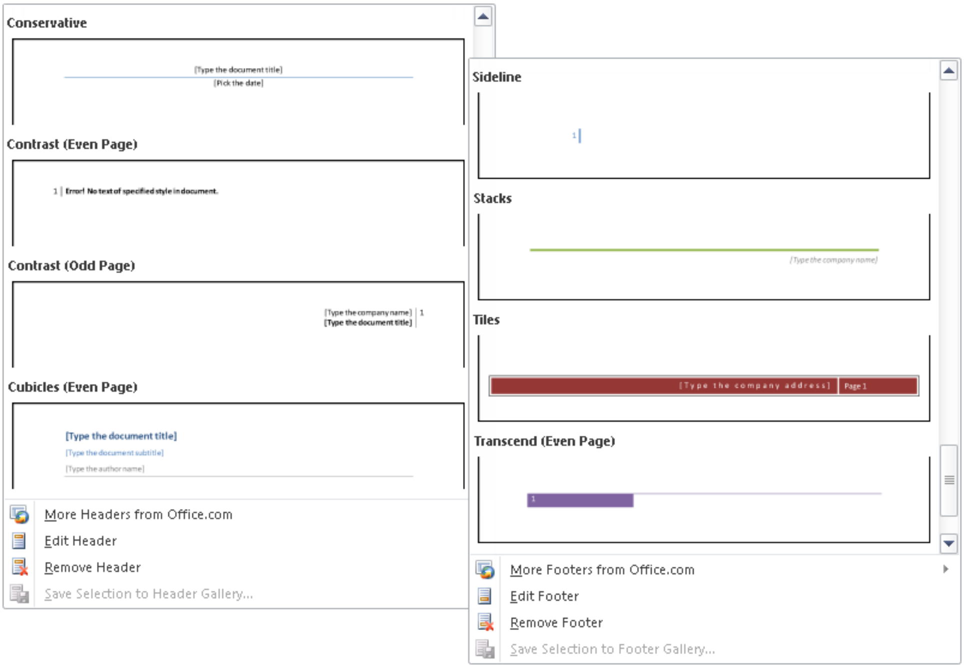
- In the *Background* document, change the background color to the second lightest green (Olive Green, Accent 3, Lighter 60%).
- Add the Canvas texture to the background of the *Background* document.
- Add the URGENT text watermark to the *Background* document.

3.5 Create and Modify Headers and Footers

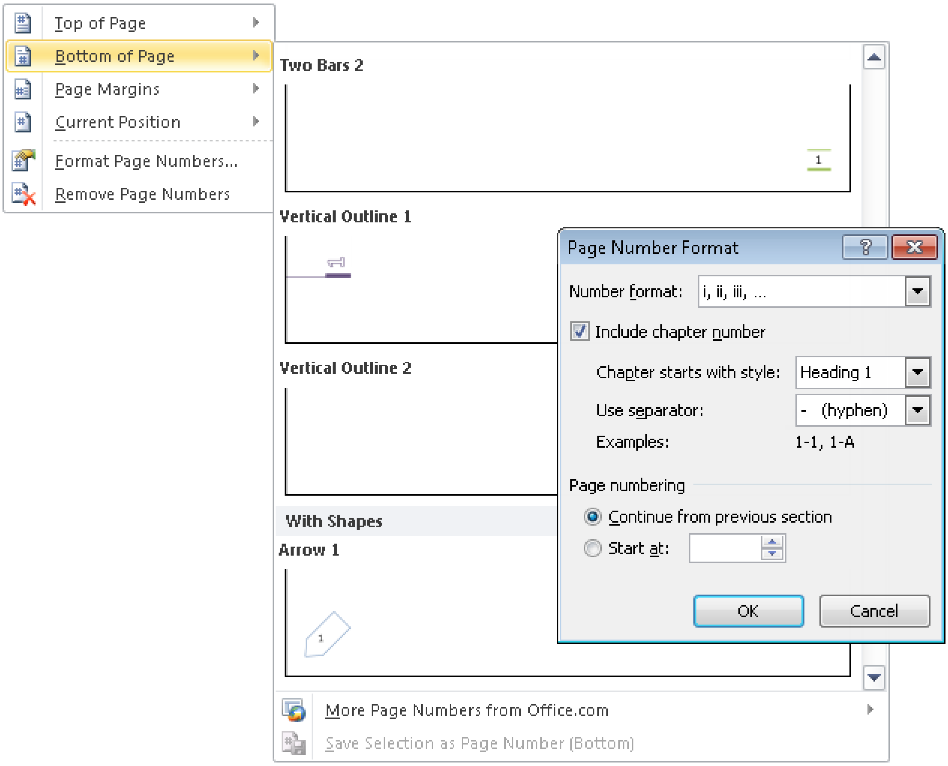
You can display information on every page of your document by creating headers and footers—regions at the top and bottom of the pages that can be created and formatted independently. You can have a different header and footer on the first page of a document, different headers and footers on odd and even pages, or different headers and footers for each section. When you create a header or footer, Word applies the header or footer style specified by the document's template, indicates the header and footer areas by displaying dotted borders, and displays a contextual Design tab on the ribbon.

You can enter information in the header and footer areas the same way you enter ordinary text. You can use the commands on the Design tab to enter and format items such as the date and time, move from one header or footer to another, and establish the location and position of the header and footer.

Tip If your document contains section breaks, each successive section inherits the headers and footers of the preceding section unless you break the link between the two sections. You can then create a different header and footer for the current section. For information about sections, see the "Setting Section Breaks" topic of section 3.1, "Apply and Manipulate Page Setup Settings."



If you want to enter page numbers, you can select the style you want from the Page Number gallery. You can format the page numbers in a variety of ways in the Page Number Format dialog box.



➤ To insert a header or footer

1. Position the cursor anywhere in the document.
2. On the **Insert** tab, in the **Header & Footer** group, click the **Header** button or the **Footer** button.
3. In the **Header** gallery or the **Footer** gallery, click the design you want.
4. On the Header & Footer Tools **Design** contextual tab, in the **Options** group, do any of the following:
   - Select the **Different First Page** check box if you want to use a different header or footer on the first page of the document. You might want to do this if, for example, the first page of the document is a cover page.
   - Select the **Different Odd & Even Pages** check box if you want to use different headers or footers for odd pages and for even pages. Select this option if the content of the header or footer is not centered and the document content will be viewed on facing pages.
   - Clear the **Show Document Text** check box if you find that you're distracted by the main document text when you're working in the header or footer.

5. In the **Position** group, set the **Header from Top** or **Footer from Bottom** distance.
6. From the **Insert** group, insert the date, time, a picture, a clip art image, or any Quick Parts you want to include in the header or footer.
7. In the header or footer, replace any text placeholders and enter any other information you want to appear.
8. In the **Close** group, click the **Close Header and Footer** button.

➤ To delete a header or footer

1. Double-click the header or footer to activate it.
2. Press Ctrl+A to select all the content of the header or footer, and then press Delete.

➤ To insert the current date and/or time in a header or footer

1. In the header or footer, position the cursor where you want the date and/or time to appear.
2. On the **Design** contextual tab, in the **Insert** group, click the **Insert Date and Time** button.
3. In the **Date and Time** dialog box, do the following, and then click **OK**:
   - Click the format in which you want the date and/or time to appear in the header or footer.
   - If you want Word to update the date and/or time in the header each time you save the document, select the **Update automatically** check box.

➤ To insert a page number in a header or footer

1. On the **Insert** tab, in the **Header & Footer** group, click the **Insert Page Number** button.
2. In the **Page Number** list, point to a page number position, and then click the page number style you want.

➤ To change the format of page numbers

1. In the **Header & Footer** group, click the **Insert Page Number** button, and then click **Format Page Numbers**.
2. In the **Page Number Format** dialog box, in the **Number format** list, click the format you want.
3. Select any other options you want, and then click **OK**.

Practice Tasks

The practice files for these tasks are located in the Word\Objective3 practice file folder. If you want to save the results of the tasks, save them in the same folder with *My* appended to the file name so that you don't overwrite the original practice file.

- In the *Header* document, add a Motion (Even Page) header with the text *The Taguian Cycle*, and specify that the header should not appear on the first page. Then add a Motion (Even Page) footer that displays today's date.
- In the *Numbers* document, add page numbers to the entire document, and format the page numbers as uppercase roman numerals.

Objective Review

Before finishing this chapter, ensure that you have mastered the following skills:

3.1 Apply and Manipulate Page Setup Settings

3.2 Apply Themes

3.3 Construct Content in a Document by using the Quick Parts Tool

3.4 Create and Manipulate Page Backgrounds

3.5 Create and Modify Headers and Footers

4 Including Illustrations and Graphics in a Document

The skills tested in this section of the Microsoft Office Specialist exam for Microsoft Word 2010 relate to inserting and formatting visual elements. Specifically, the following objectives are associated with this set of skills:

- **4.1** Insert and Format Pictures in a Document
- **4.2** Insert and Format Shapes, WordArt, and SmartArt
- **4.3** Insert and Format Clip Art
- **4.4** Apply and Manipulate Text Boxes

Graphic elements can add flair to a document, provide additional structure, or, more importantly, convey information to the reader.

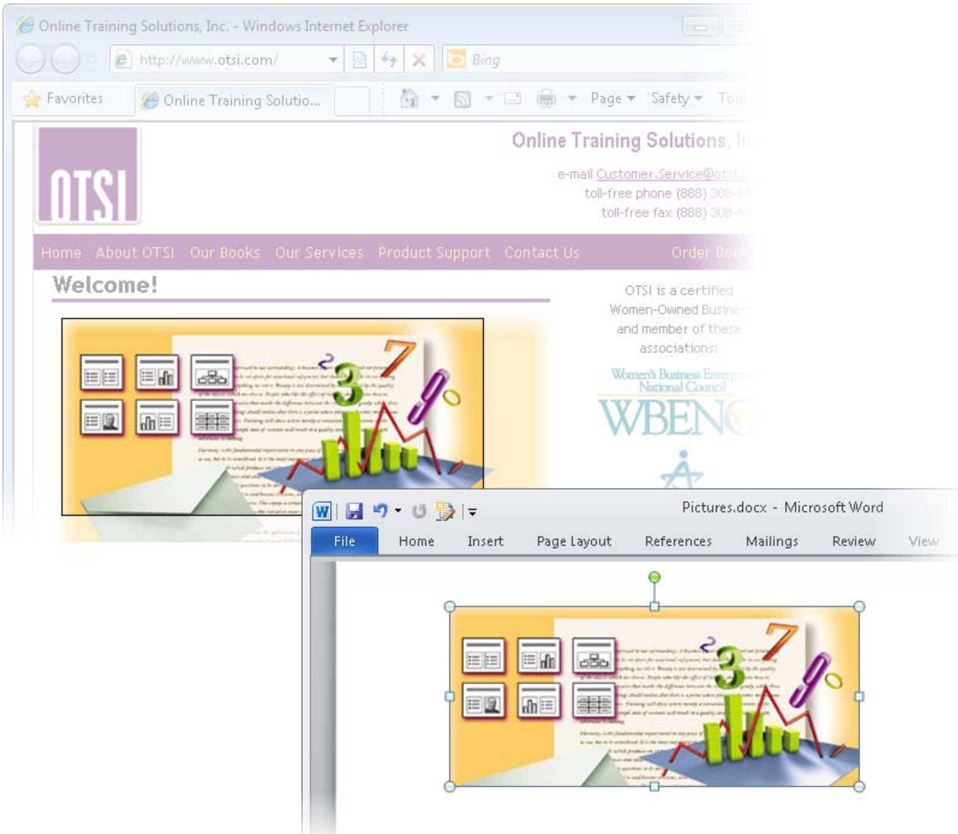
This chapter guides you in studying ways of inserting and formatting pictures, shapes, and clip art elements; creating decorative text as WordArt objects; illustrating relational concepts with SmartArt diagrams; and presenting information in text boxes.

> **Practice Files** **Before you can complete the practice tasks in this chapter, you need to copy the book's practice files to your computer. The practice files you'll use to complete the tasks in this chapter are in the Word\Objective4 practice file folder. A complete list of practice files is provided in "Using the Book's Companion Content" at the beginning of this book.**

4.1 Insert and Format Pictures in a Document

Inserting Pictures

You can insert digital photographs or pictures created in almost any program into a Word document. You can also capture and insert images of content displayed on your computer screen directly from Word. By using the built-in screen clipping tool, you can insert screen captures of entire windows or selected areas of on-screen content.



Inserting images in a document can increase the file size of the document dramatically. By default, Word compresses pictures when you save a file. You can turn off automatic compression and compress only the pictures you want. You can also adjust the compression rate to be appropriate for the way the document will be viewed.

➤ **To insert a picture from a file**

1. On the **Insert** tab, in the **Illustrations** group, click the **Insert Picture from File** button.
2. In the **Insert Picture** dialog box, browse to and click the file you want. Then do one of the following:
   - Click **Insert** to insert the picture into the document.
   - In the **Insert** list, click **Link to File** to insert a picture that will update automatically if the picture file changes.
   - In the **Insert** list, click **Insert and Link** to insert a picture that you can manually update if the picture file changes.

➤ **To change the picture compression settings**

1. On the Picture Tools **Format** contextual tab, in the **Adjust** group, click **Compress Pictures**.
2. In the **Compress Pictures** dialog box, set the options and output you want, and then click **OK** twice.

➤ **To capture and insert a screen clipping**

1. Display the content you want to capture.
2. In the Word document, position the cursor where you want to insert the screen clipping.
3. On the **Insert** tab, in the **Illustrations** group, click the **Screenshot** button.
4. In the **Screenshot** gallery, do one of the following:
   - Click a window thumbnail to insert a picture of that window into the document at the cursor.
   - Click **Screen Clipping**, and then drag across the part of the screen you want to capture.

Formatting Pictures

After you insert an image in a document, you can modify it in many ways. For example, you can crop or resize a picture, change the picture's brightness and contrast, recolor it, apply artistic effects to it, and compress it to reduce the size of the document containing it. You can apply a wide range of preformatted styles to a picture to change its shape and orientation, as well as add borders and picture effects.

➤ **To change the size and/or shape of a selected picture**

➜ Drag its sizing handles.

➜ On the Picture Tools **Format** contextual tab, in the **Size** group, change the **Height** and **Width** settings.

➜ On the **Format** contextual tab, click the **Size** dialog box launcher. Then on the **Size** page of the **Layout** dialog box, change the **Height**, **Width**, or **Scale** settings.

➤ **To move a picture**

➜ Drag the picture vertically to a new location.

➜ Select the picture. On the **Format** contextual tab, in the **Arrange** group, display the **Position** gallery, and then click one of the **In Line with Text** or **With Text Wrapping** icons.

➤ **To copy a picture to a new location**

➜ Hold down the Ctrl key and drag the picture vertically to the second location.

> **Tip** **Release the mouse button first, and then the Ctrl key. (If you release Ctrl first, Word moves the image instead of copying it.)**

➤ **To apply artistic effects to a selected picture**

➜ On the **Format** contextual tab, in the **Adjust** group, expand the **Artistic Effects** gallery, and then click the effect you want to apply.

➤ To apply a style to a selected picture

➜ On the **Format** contextual tab, in the **Picture Styles** group, expand the **Quick Styles** gallery, and then click the style you want to apply.

Or

1. On the **Format** contextual tab, click the **Picture Styles** dialog box launcher.
2. In the **Format Picture** dialog box, on the **Line Color**, **Line Style**, **Shadow**, **Reflection**, **Glow and Soft Edges**, **3-D Format**, and **3-D Rotation** pages, choose the effects you want to apply. Then click **Close**.

Practice Tasks

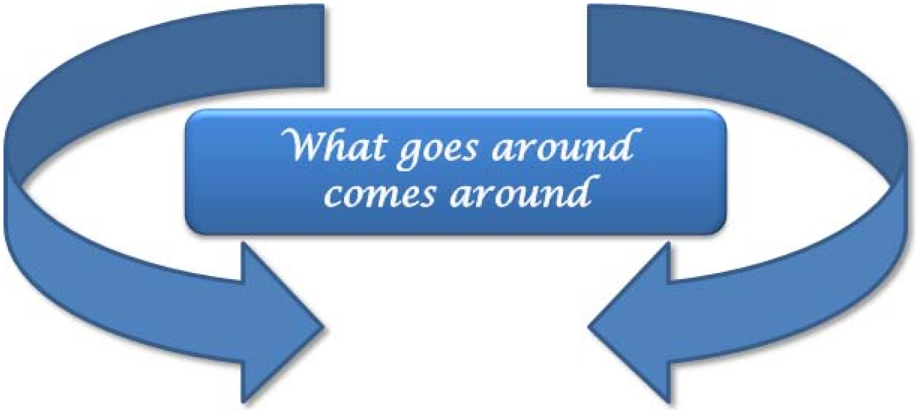
The practice file for these tasks is located in the Word\Objective4 practice file folder. If you want to save the results of the tasks, save them in the same folder with *My* appended to the file name so that you don't overwrite the original practice file.

- Insert the *Logo* graphic at the beginning of the *Picture* document. Then size the logo so that it is 0.5" high, maintaining the height-to-width ratio.
- Apply the Texturizer effect to the text in the logo, and then place a copy of the logo at the end of the *Picture* document.
- Insert a screen clipping of the Microsoft logo, captured from the home page of the Microsoft website, at the end of the *Picture* document.

4.2 Insert and Format Shapes, WordArt, and SmartArt

Inserting and Formatting Shapes

If you want to add visual interest and impact to a document but you don't need anything as fancy as a picture or a clip art image, you can draw a shape. Shapes can be simple, such as lines, circles, or squares; or more complex, such as stars, hearts, and arrows. You can format shapes by using built-in styles or by applying a fill, outline, and effects. You can add text to shapes, specify the text direction, and format the text, either by using normal formatting techniques or WordArt styles, or by applying a fill, outline, and effects.



If you build a picture by drawing individual shapes, you can group them so that they act as one object. If you move or size a grouped object, the shapes retain their positions in relation to each other. To break the bond, you ungroup the object.

If your picture consists of more than a few shapes, you might want to draw the shapes on a drawing canvas instead of directly on the page. The drawing canvas keeps the parts of the picture together, helps you position the picture, and provides a frame-like boundary between your picture and the text on the page. You can then draw shapes on the canvas in the usual ways. At any time, you can size and move the drawing canvas and the shapes on it as one unit.

➤ To open a drawing canvas

➜ On the **Insert** tab, in the **Illustrations** group, click the **Shapes** button, and then click **New Drawing Canvas**.

> **Tip** If you prefer to always use the drawing canvas when creating pictures with shapes, display the Advanced page of the Word Options dialog box. Then under Editing Options, select the Automatically Create Drawing Canvas When Inserting AutoShapes check box, and click OK.

➤ To draw a standard shape

1. On the **Insert** tab, in the **Illustrations** group, click the **Shapes** button.
2. In the **Shapes** gallery, click the shape you want, and then do one of the following:
   - Click anywhere on the page to insert a standard-size shape.
   - Drag anywhere on the page to draw a shape the size you want.

➤ To add text to a selected shape

- ➜ Click the shape, and then enter the text.
- ➜ Right-click the shape, click **Add Text**, and then enter the text.

> **Tip** For more control over the text within a shape, you can insert the text in a text box. For more information, see section "4.4, "Apply and Manipulate Text Boxes."

➤ To customize a selected shape

1. On the Drawings Tools **Format** contextual tab, in the **Insert Shapes** group, click the **Edit Shape** button, and then click **Edit Points**.
2. Drag the intersection points that appear on the shape to change its form.

> **Tip** You change the size and location of a shape by using the same techniques as you do with other graphic elements.

➤ To change a selected shape to another shape

- ➜ On the **Format** contextual tab, in the **Insert Shapes** group, click the **Edit Shape** button, point to **Change Shape**, and then click the shape you want.

➤ To format a selected shape

- ➜ On the **Format** contextual tab, do any of the following:
  - ❍ In the **Shape Styles** gallery, click the built-in style you want to apply.
  - ❍ In the **Shape Styles** group, in the **Shape Fill**, **Shape Outline**, and **Shape Effects** galleries, click the settings you want.

➤ To format text attached to a selected shape

- ➜ On the **Format** contextual tab, do any of the following:
  - ❍ In the **WordArt Styles** gallery, click the built-in style you want to apply.
  - ❍ In the **WordArt Styles** group, in the **Text Fill**, **Text Outline**, and **Text Effects** galleries, click the settings you want.
  - ❍ In the **Text** group, click **Text Direction**, and then click the direction in which you want the text to flow.

➤ **To stack multiple shapes**

➜ Drag the shapes so that they overlap.

➤ **To change the stacking order of multiple shapes**

1. Select the shape you want to move up or down in the stack.
2. On the **Format** contextual tab, in the **Arrange** group, do any of the following:
   - Click the **Bring Forward** or **Send Backward** button to move the shape up or down one level.
   - In the **Bring Forward** list, click **Bring to Front** to move the shape to the top of the stack.
   - In the **Bring Forward** list, click **Bring in Front of Text** to move the shape on top of the surrounding text.
   - In the **Send Backward** list, click **Send to Back** to move the shape to the bottom of the stack.
   - In the **Send Backward** list, click **Send Behind Text** to move the shape behind the surrounding text.

➤ **To group shapes**

1. Select the first shape, hold down the Ctrl key, and then click the additional shapes you want to group.
2. On the **Format** contextual tab, in the **Arrange** group, click the **Group** button, and then click **Group**.

➤ **To ungroup shapes**

1. Select the grouped shapes.
2. On the **Format** contextual tab, in the **Arrange** group, click the **Group** button, and then click **Ungroup**.

Inserting and Modifying WordArt

When you want a text banner that is fancier than one you can create by applying character formatting, you can use WordArt. WordArt text can swirl, grow bigger from one end to the other or in the middle, take on a three-dimensional shape, and change color from one letter to the next. The WordArt object is attached to the paragraph that is active at the time you create the WordArt object, but you can move it independently of the surrounding text.

➤ To insert a WordArt object

1. On the **Insert** tab, in the **Text** group, click the **WordArt** button.
2. In the **WordArt** gallery, click the text style you want.
3. Replace the placeholder text in the WordArt object.
4. Set the size and other attributes of the text as you would with any other text.

> **Tip You change the size, shape, and location of a WordArt object by using the same techniques as you do with other graphic elements.**

➤ To create a WordArt object from existing text

1. Select the text.
2. On the **Insert** tab, in the **Text** group, click the **WordArt** button.
3. In the **WordArt** gallery, click the text style you want.
4. Set the size and other attributes of the text as you would any other text.

➤ To format the background of a selected WordArt object

➜ On the Drawing Tools **Format** contextual tab, do any of the following:

- In the **Shape Styles** gallery, click the built-in style you want to apply.
- In the **Shape Styles** group, in the **Shape Fill**, **Shape Outline**, and **Shape Effects** galleries, click the settings you want.

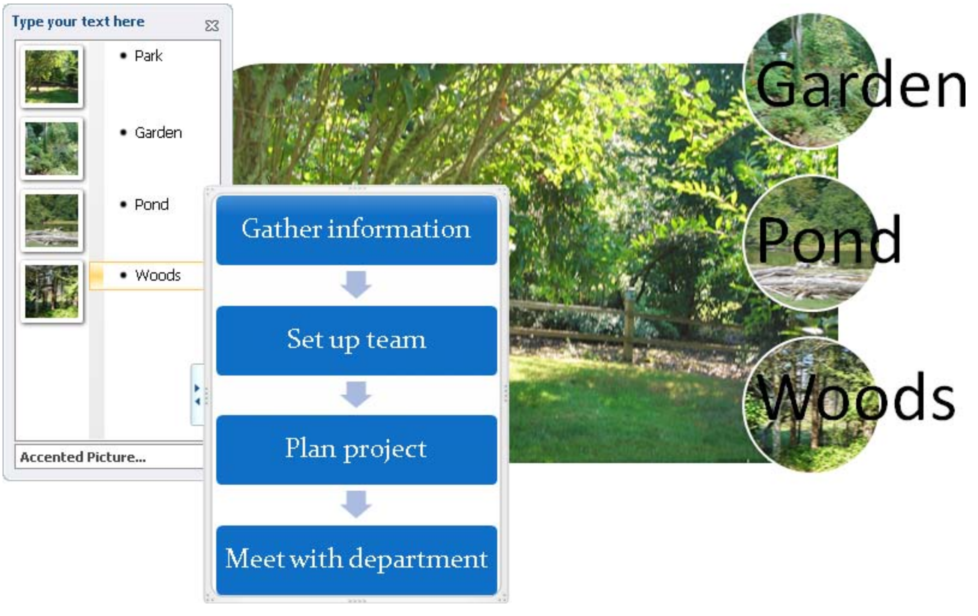
➤ To format the text of a selected WordArt object

➜ On the **Format** contextual tab, do any of the following:

- In the **WordArt Styles** gallery, click the built-in style you want to apply.
- In the **WordArt Styles** group, in the **Text Fill**, **Text Outline**, and **Text Effects** galleries, click the settings you want.
- In the **Text** group, click **Text Direction**, and then click the direction in which you want the text to flow.

Inserting and Modifying SmartArt Diagrams

When you need your document to clearly illustrate a concept such as a process, cycle, hierarchy, or relationship, you can create a dynamic, visually appealing diagram by using SmartArt diagrams. After selecting the type of diagram you want and inserting it into the document, you add text either directly in the diagram's shapes or from its text pane. SmartArt diagrams can be only text or text and pictures.



➤ To insert a diagram

1. On the **Insert** tab, in the **Illustrations** group, click the **Insert SmartArt Graphic** button.
2. In the left pane of the **Choose a SmartArt Graphic** dialog box, click the type of diagram you want.
3. In the center pane, click the layout you want, and then click **OK**.

> **Tip** You change the size, shape, and location of a SmartArt diagram by using the same techniques as you do with other graphic elements.

➤ To add text to a diagram shape

➜ With the diagram selected, click the shape, and enter the text.

➜ In the text pane, click the bullet for the shape, and enter the text.

> **Tip** **If the text pane is not open, click the tab on the left side of the diagram's frame, or click the Text Pane button in the Create Graphic group on the SmartArt Tools Design contextual tab.**

➤ To change the layout of a selected diagram

➜ To switch to a layout in the same diagram category, on the SmartArt Tools **Design** contextual tab, in the **Layouts** gallery, click the layout you want.

➜ To switch to a layout in a different diagram category, on the **Design** contextual tab, in the **Layouts** gallery, click **More Layouts** and then, in the **Choose a SmartArt Graphic** dialog box, choose the layout you want.

➤ To delete a shape from a SmartArt diagram

➜ Click the shape, and then press the Delete key.

➤ To change the color scheme of a selected diagram

➜ On the **Design** contextual tab, in the **SmartArt Styles** group, click the **Change Colors** button and then click the color scheme you want.

➤ To apply a style to a selected diagram

➜ On the **Design** contextual tab, in the **SmartArt Styles** gallery, click the style you want to apply.

➤ To apply a style to a a selected diagram shape

➜ On the SmartArt Tools **Format** contextual tab, in the **Shape Styles** gallery, click the style you want to apply.

Or

1. On the **Format** contextual tab, click the **Shape Styles** dialog box launcher.
2. In the **Format Shape** dialog box, on the **Line Color**, **Line Style**, **Shadow**, **Reflection**, **Glow and Soft Edges**, **3-D Format**, and **3-D Rotation** pages, choose the effects you want to apply. Then click **Close**.

Strategy **Many formatting options are available from the Design and Format contextual tabs. Be familiar with the options available on the contextual tabs as well as in the associated dialog boxes.**

Practice Tasks

The practice files for these tasks are located in the Word\Objective4 practice file folder. If you want to save the results of the tasks, save them in the same folder with *My* appended to the file name so that you don't overwrite the original practice file.

- At the end of the *Shapes* document, draw a circle 1.5 inches in diameter in the upper-left corner of a new drawing canvas. Then create a copy of the circle in the upper middle of the drawing canvas and another in the upper-right corner. Draw curved lines resembling strings below each circle. Group the shapes, and then move the group to the top of the document.
- At the end of the *SmartArt* document, insert a Vertical Process diagram. In the text pane, enter *The Journey*, *The Battle*, and *The Twist* as bullet points. Then add a new shape containing the words *True Climax*.
- At the beginning of the *WordArt* document, insert *Welcome Esther Valle!* in WordArt style 16 with 44-point text.
- In the *WordArt* document, change the words *Extra! Extra!* into WordArt style 21, and change the color of the letters to orange with a red outline. Then set the spacing to Very Loose. Make the object two inches wider, and then apply Shadow style 7.

4.3 Insert and Format Clip Art

Clip art comes in many different styles and formats, including illustrations, photographs, videos, and audio clips. The only thing the clips have in common is that they are free and available without any copyright restrictions. You can search for clip art objects by using keywords, and store the images you might want to use in the Microsoft Clip Organizer. You can also edit the keywords associated with an image and view its properties.

➤ To locate and insert a clip art object

1. On the **Insert** tab, in the **Illustrations** group, click the **Clip Art** button.
2. In the **Clip Art** pane, in the **Search for** box, enter a keyword, and click **Go**.
3. In the results list, click the thumbnail of the image you want.

> **Tip** You change the size, shape, and location of a clip art object by using the same techniques as you do with other graphic elements.

➤ **To temporarily store a clip art image on the Microsoft Office Clipboard**

➜ In the **Clip Art** pane, point to the image, click the arrow that appears, and then click **Copy**.

➤ **To store a clip art object in the Clip Organizer**

1. In the **Clip Art** pane, point to the image, click the arrow that appears, and then click **Make Available Offline**.
2. In the **Copy to Collection** dialog box, select or create the folder in which you want to store the clip art object, and then click **OK**.

➤ **To save a clip art object as a file**

1. Insert the clip art object in a document.
2. Right-click the clip art object, and then click **Save as Picture**.
3. In the **File Save** dialog box, browse to the location in which you want to save the file, name the file, select a file type, and then click **Save**.

➤ **To open the Clip Organizer**

➜ On the Windows **Start** menu, click **All Programs**, **Microsoft Office**, **Microsoft Office 2010 Tools**, and then **Microsoft Clip Organizer**.

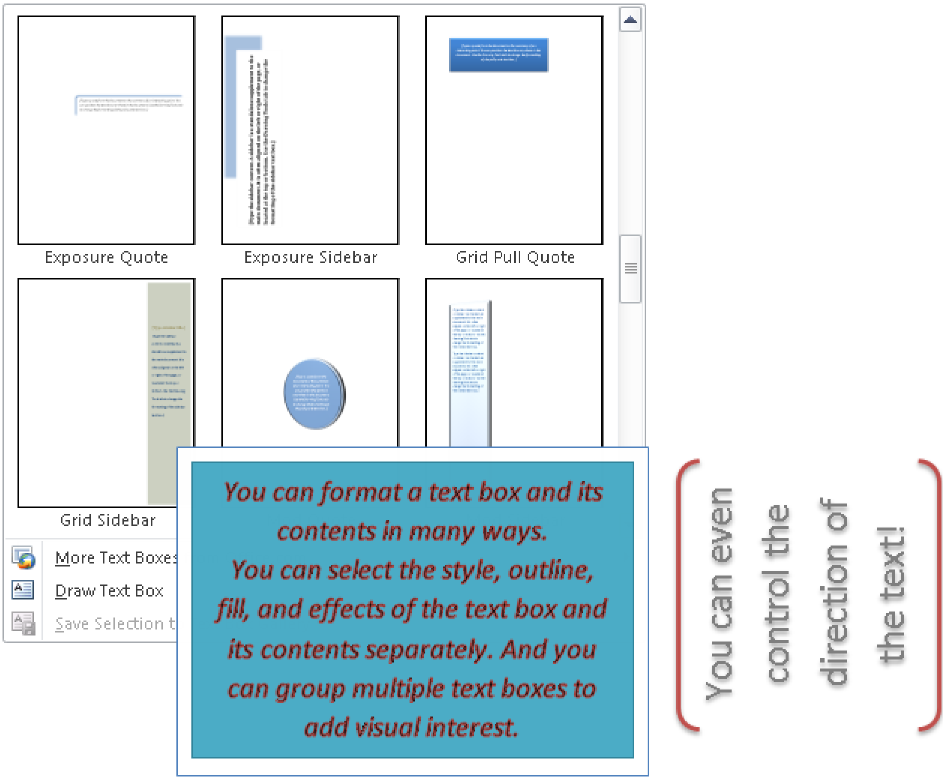
Practice Tasks

The practice file for these tasks is located in the Word\Objective4 practice file folder. If you want to save the results of the tasks, save them in the same folder with *My* appended to the file name so that you don't overwrite the original practice file.

- In the *ClipArt* document, insert a stylized dollar clip art image at the end of the *Greg Guzik* paragraph, and make it 0.25 inch square. Then insert a copy of the image at the beginning of the paragraph.
- Search for other stylized dollar clip art images, and save several of them to the Clip Organizer.
- In the *ClipArt* document, replace the dollar image with a new one from the Clip Organizer. Then resize and reposition it as you like.

4.4 Apply and Manipulate Text Boxes

When you want text that is not part of the main flow to appear on a page, you can create a text box in one of several built-in styles. If none of the predefined text-box building blocks meets your needs, you can draw and format your own text box. You can make your custom text boxes available from the Text Box gallery by saving them as building blocks.



➤ To insert a predefined text box

➜ On the **Insert** tab, in the **Text** group, click the **Text Box** button, and then click **Draw Text Box**.

Or

1. On the **Insert** tab, in the **Text** group, click the **Quick Parts** button, and then click **Building Blocks Organizer**.
2. In the **Building Blocks Organizer** dialog box, click any building block that is a member of the **Text Boxes** gallery, and then click **Insert**.

➤ **To insert a custom text box**

➜ On the **Insert** tab, in the **Text** group, click the **Text Box** button, and click **Draw Text Box**. Then do one of the following:

- Click anywhere on the page to insert a dynamic text box that resizes as you enter text.
- Drag anywhere on the page to draw a text box of a fixed size.

> **Tip** You change the size, shape, and location of a text box by using the same techniques as you do with other graphic elements.

➤ **To copy a text box to a new location**

➜ Hold down the Ctrl key and drag the text box to the second location.

> **Tip** Release the mouse button first, and then the Ctrl key. (If you release Ctrl first, Word will move the image instead of copying it.)

➤ **To insert text in a text box**

➜ Click in the text box so that the text box is surrounded by a dashed (not solid) border. Then enter text as you would in a document.

➤ **To link text boxes so that text flows from one text box to another**

1. Click the first text box.
2. On the Text Box Tools **Format** contextual tab, in the **Text** group, click **Create Link**.
3. When the pointer changes to a pitcher shape, point to an empty text box in which you want to continue the text, and when the pointer changes to a pouring pitcher, click once.

➤ **To change the direction of text in a selected text box**

➜ On the **Format** contextual tab, in the **Text** group, click the **Text Direction** button, and then click the direction you want.

➤ **To format a text box**

1. Click the text box frame so that the text box is surrounded by a solid (not dashed) border.

2. On the **Format** contextual tab, do any of the following:
   - In the **Shape Styles** gallery, click the built-in style you want to apply.
   - In the **Shape Styles** group, in the **Shape Fill**, **Shape Outline**, and **Shape Effects** galleries, click the settings you want.

➤ To change the default formatting for text boxes

➜ Select a formatted text box, right-click its border, and then click **Set as Default Text Box**.

➤ To save a selected text box as a building block

1. On the **Format** contextual tab, in the **Text** group, click the **Text Box** button, and then click **Save Selection to Text Box Gallery**.
2. In the **Create New Building Block** dialog box, enter a name and description, select or create a category, and then click **OK**.

Tip When you exit Word after saving a custom building block, you'll be asked whether you want to save changes to the template in which you stored the building block. If you want the building block to be available for future documents, click Save; otherwise, click Don't Save.

Practice Tasks

The practice file for these tasks is located in the Word\Objective4 practice file folder. If you want to save the results of the tasks, save them in the same folder with *My* appended to the file name so that you don't overwrite the original practice file.

- In the *TextBoxes* document, insert a Simple Text Box. Then cut and paste the paragraph of the document into the text box.
- Continuing in the *TextBoxes* document, decrease the size of the text box to 1.5 inches high by 2.5 inches wide, and then draw another text box of the same size below the first one. Link the two text boxes so that the overflow text from the first box is displayed in the second text box.
- Continuing in the *TextBoxes* document, color the first text box Light Blue with a Blue border and the second text box Light Green with a Green border. Then apply Shadow Style 1 to both boxes.

Objective Review

Before finishing this chapter, ensure that you have mastered the following skills:

4.1 Insert and Format Pictures in a Document

4.2 Insert and Format Shapes, WordArt, and SmartArt

4.3 Insert and Format Clip Art

4.4 Apply and Manipulate Text Boxes

5 Proofreading Documents

The skills tested in this section of the Microsoft Office Specialist exam for Microsoft Word 2010 relate to reviewing and validating document content and working with AutoCorrect settings. Specifically, the following objectives are associated with this set of skills:

5.1 Validate Content by Using Spelling and Grammar Checking Options
5.2 Configure AutoCorrect Settings
5.3 Insert and Modify Comments in a Document

In the days of handwritten and typewritten documents, people might have tolerated a typographical or grammatical error or two because correcting such errors without creating a mess was difficult. Word-processing programs such as Word have built-in spelling and grammar checkers, so now documents that contain these types of errors are likely to reflect badly on their creators. Word provides three tools to help you with the chore of eliminating spelling and grammar errors: visual error indicators, the spelling and grammar checker, and the AutoCorrect feature.

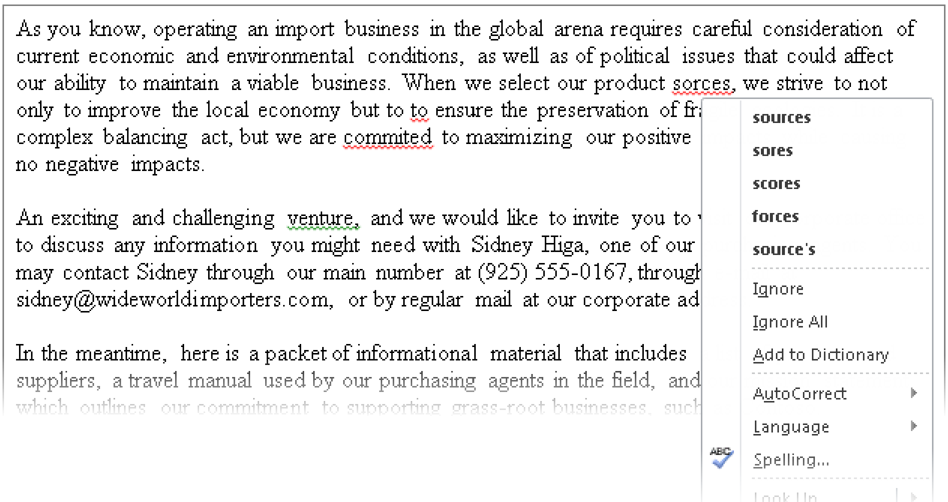
When reviewing the content of a document, it can be useful to insert information in comments, either for your own reference or to initiate discussion with someone else.

This chapter guides you in studying ways of checking the spelling and grammatical accuracy of document content, configuring Word to automatically correct frequently misspelled words, and inserting and viewing comments in documents.

> **Practice Files** Before you can complete the practice tasks in this chapter, you need to copy the book's practice files to your computer. The practice files you'll use to complete the tasks in this chapter are in the Word\Objective5 practice file folder. A complete list of practice files is provided in "Using the Book's Companion Content" at the beginning of this book.

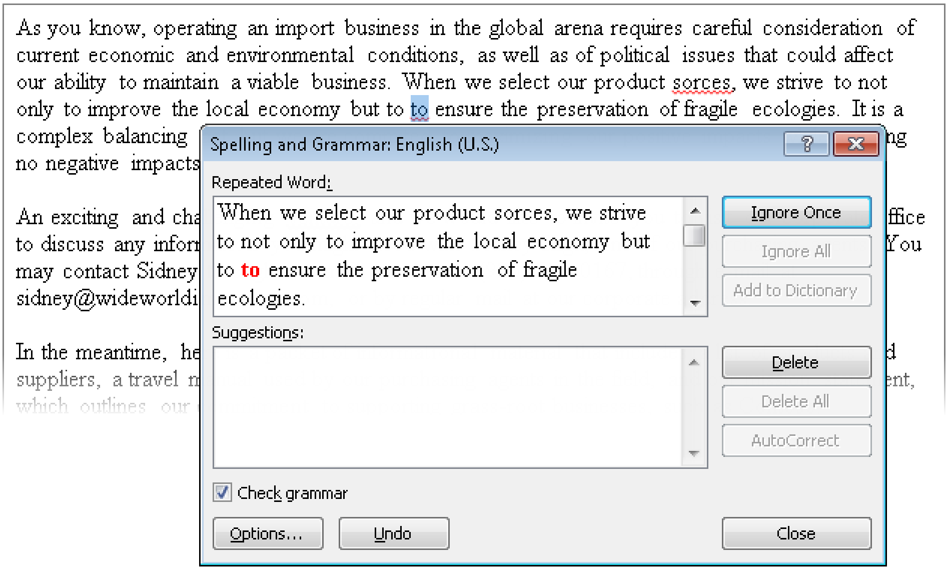
5.1 Validate Content by Using Spelling and Grammar Checking Options

Word automatically indicates suspected spelling and grammar errors by using colored error indicators. Red wavy underlines indicate potential spelling errors and green wavy underlines indicate potential grammar errors. You can correct the indicated error by choosing a replacement word or phrase from the built-in dictionary, or you can instruct Word to ignore this instance or all instances of the underlined word or phrase.



> **Tip** You might also see blue wavy underlines, which indicate words that are correctly spelled but that might be incorrectly used in a particular context.

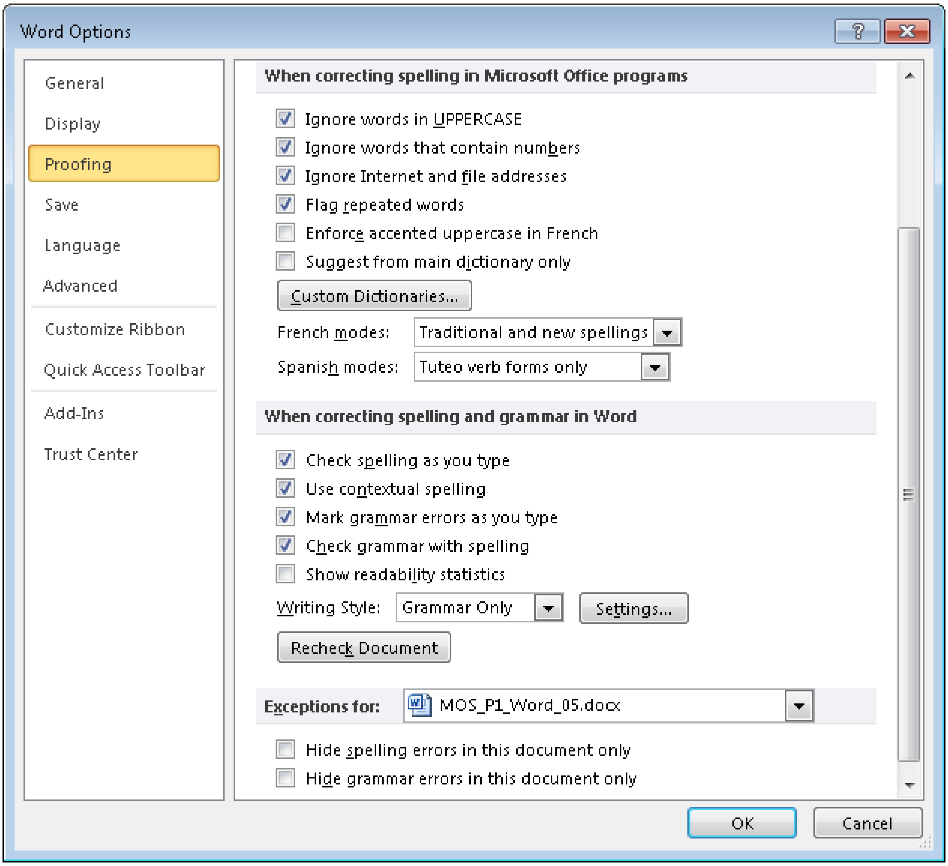
With the spelling and grammar checker, you can check the spelling or grammar of selected content or an entire document. From the Spelling And Grammar dialog box, you can review and correct any issues that don't match the built-in spelling and grammar rules.



The buttons available in the Spelling And Grammar dialog box vary based on the type of issue being addressed, as follows:

- If the spelling and grammar checker flags a suspected misspelling, it suggests corrections.
- If the tool flags a suspected breach of grammar rules, it tells you which rule you have broken and suggests corrections.

Options on the Proofing page of the Word Options dialog box control the dictionaries used by Word when checking the spelling and grammar of message content, as well as the language in which button labels, tab names, Help content, and ScreenTips are displayed.



➤ To replace an underlined word or phrase with a suggested correction

➜ Right-click the underlined word or phrase and then, at the top of the context menu, click the replacement word or phrase.

➤ To remove an error indicator without making changes

➜ Right-click the underlined word or phrase, and then click **Ignore**.

➤ To check spelling and grammar in a document

1. On the **Review** tab, in the **Proofing** group, click the **Spelling & Grammar** button.
2. In the **Spelling and Grammar** dialog box, for each error that is flagged, do one of the following:
   - Click **Ignore Once** to move to the next error without making a change.
   - Click **Ignore All** to move to the next error and instruct Word to not flag any further instances of the selected word or phrase as an error.
   - Click **Add to Dictionary** to add the selected word or phrase to the dictionary that is currently in use.
   - Click a suggested correction in the **Suggestions** box, and then click **Change** to implement the change for the currently selected word or phrase.
   - Click a suggested correction in the **Suggestions** box and then click **Change All** to implement the change for all instances of the currently selected word or phrase in the document.
   - Click **Delete** to delete the currently selected word or phrase.
   - Click **Delete All** to delete all instances of the currently selected word or phrase in the document.

➤ To hide spelling or grammar errors in a document

1. In the **Spelling and Grammar** dialog box, click **Options**.

   Or

   In the left pane of the **Word Options** dialog box, click **Proofing**.
2. In the **Exceptions for** section of the **Proofing** page, do any of the following:
   - To hide all wavy red underlines, select the **Hide spelling errors in this document only** check box.
   - To hide all wavy green underlines, select the **Hide grammar errors in this document only** check box.

➤ To customize the spelling and grammar-checking settings

1. In the **Spelling and Grammar** dialog box, click **Options**.

   Or

   In the left pane of the **Word Options** dialog box, click **Proofing**.
2. In the **When correcting spelling in Microsoft Office programs** section of the **Proofing** page, select the spelling correction options and dictionaries you want to use in all Office programs, including Word.
3. In the **When correcting spelling and grammar in Word** section of the **Proofing** page, select the spelling-checking and grammar-checking options you want to use in Word. (You can select different options in other Office programs.)

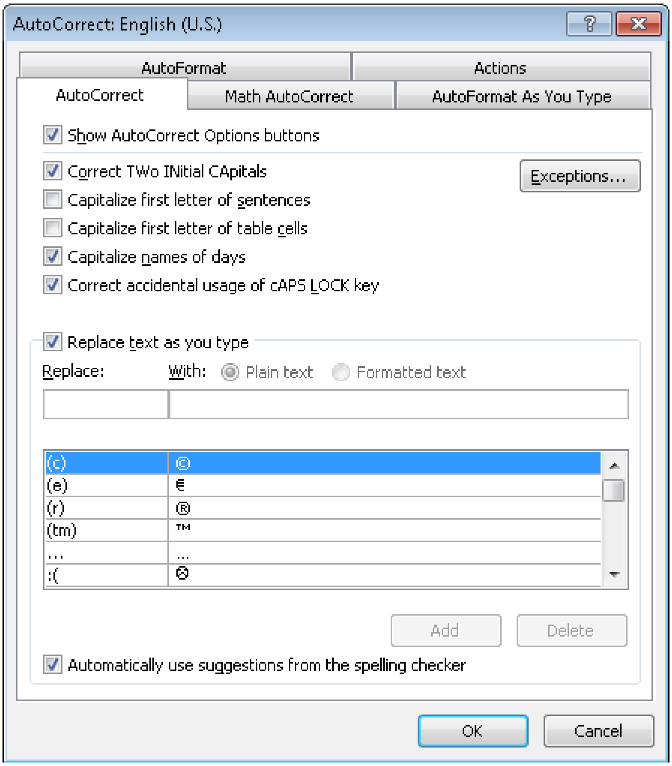
Practice Tasks

The practice file for these tasks is located in the Word\Objective5 practice file folder. If you want to save the results of the tasks, save them in the same folder with *My* appended to the file name so that you don't overwrite the original practice file.

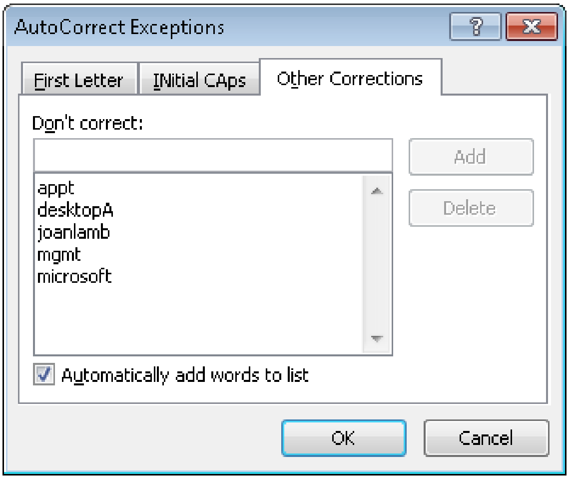
- In the first paragraph of the *Letter* document, correct the spelling of the word *sorces* by selecting the correct spelling from the context menu.
- Check the spelling and grammar of the *Letter* document, and do the following from within the Spelling And Grammar dialog box:
  - Correct the duplicate instances of the word *to* in the first paragraph.
  - Add the company name *Contoso* to the dictionary so that Word doesn't flag future instances of it as a spelling error.

5.2 Configure AutoCorrect Settings

The AutoCorrect feature corrects commonly misspelled words, such as *adn* to *and*, so that you don't have to correct them yourself. AutoCorrect includes a long list of frequently misspelled words and their correct spellings. In addition to correcting spelling errors, the AutoCorrect feature corrects common capitalization issues.



If you frequently misspell a word that AutoCorrect doesn't change, you can add it to the list in the AutoCorrect dialog box. If AutoCorrect frequently changes a word or letter combination that you want it to leave as it is, you can create an exception to the AutoCorrect rules for that specific word or letter combination.



Strategy Be familiar with the different types of AutoCorrect exceptions you can create.

➤ To add a misspelling to the AutoCorrect list

1. Select the misspelled word and then, on the **Proofing** page of the **Word Options** dialog box, click **AutoCorrect Options**.

   Or

   Right-click the misspelled word, point to **AutoCorrect**, and then click **AutoCorrect Options**.

2. On the **AutoCorrect** page of the **AutoCorrect** dialog box, enter the correct spelling in the **With** box. Click **Add**, and then click **OK**.

   Or

1. On the **Proofing** page of the **Word Options** dialog box, click **AutoCorrect Options**.
2. On the **AutoCorrect** page of the **AutoCorrect** dialog box, enter the misspelling in the **Replace** box and the correct spelling in the **With** box. Click **Add**, and then click **OK**.

➤ To modify the default automatic correction options

1. On the **Proofing** page of the **Word Options** dialog box, click **AutoCorrect Options**.
2. On the **AutoCorrect** page of the **AutoCorrect** dialog box, clear the check box of anything you don't want Word to automatically correct. Then click **OK**.

➤ To reverse an automatic correction

➜ Click the **Undo** button.

➜ Press Ctrl+Z.

➤ To create an exception to the AutoCorrect settings

1. On the **Proofing** page of the **Word Options** dialog box, click **AutoCorrect Options**.
2. On the **AutoCorrect** page of the **AutoCorrect** dialog box, click **Exceptions**.
3. In the **AutoCorrect Exceptions** dialog box, enter the text you do not want the AutoCorrect feature to change on the appropriate page, click **Add**, and then click **OK**.

➤ To remove an AutoCorrect exception

1. On the **Proofing** page of the **Word Options** dialog box, click **AutoCorrect Options**.
2. On the **AutoCorrect** page of the **AutoCorrect** dialog box, click **Exceptions**.
3. In the **AutoCorrect Exceptions** dialog box, click the exception you want to remove, click **Delete**, and then click **OK**.

Practice Tasks

The practice file for these tasks is located in the Word\Objective5 practice file folder. If you want to save the results of the tasks, save them in the same folder with *My* appended to the file name so that you don't overwrite the original practice file.

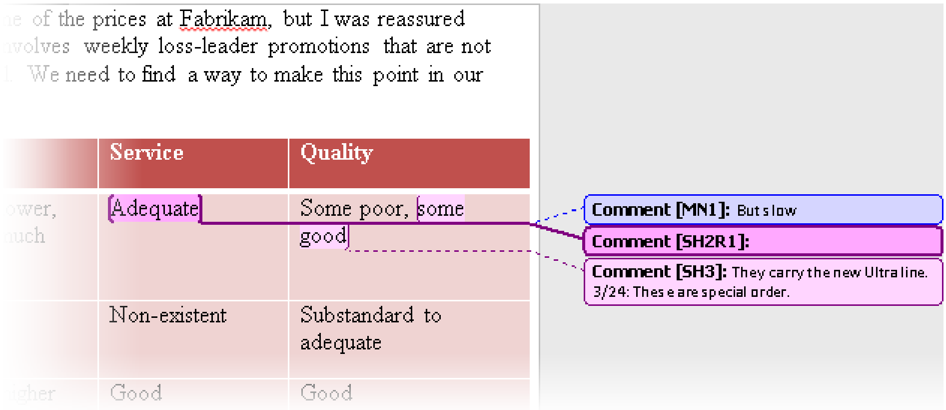
- In the *Letter* document, locate the misspelled word *commited*. From the context menu, add the misspelled word to the AutoCorrect list so that Word automatically corrects future instances to *committed*.
- Modify the AutoCorrect options so that Word automatically corrects the misspelled word *avalable* to *available*. Test the AutoCorrect modification by entering the following text at the end of the second paragraph:

  Sidney will not be avalable May 10-14.

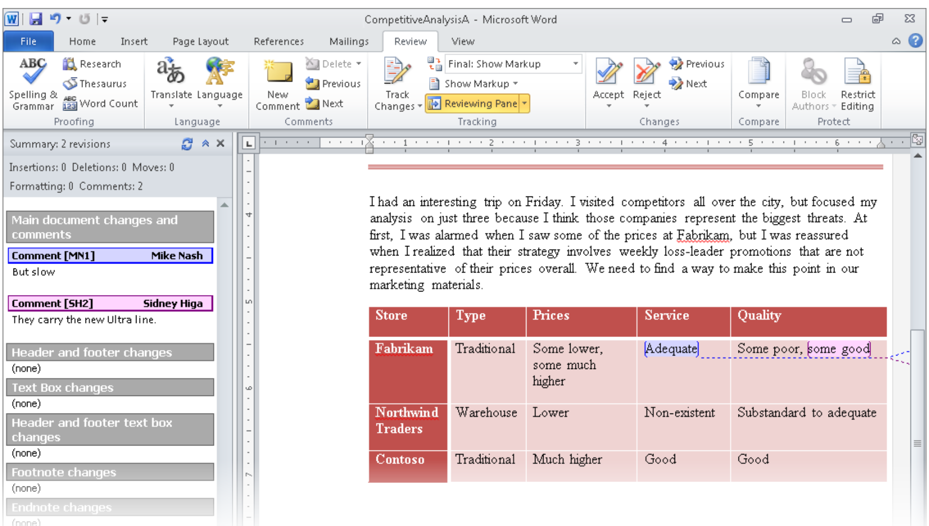
5.3 Insert and Modify Comments in a Document

You can insert comments within a document to ask questions, make suggestions, or explain changes. Depending on the document view, comments are shown in balloons, in the Reviewing Pane, or inline.

When shown in balloons, each comment is associated with specific text that is highlighted in the document in the same color as the balloon and is preceded in the balloon by the initials of the person who created the comment and a sequential number.



When shown in the Reviewing Pane, each comment header displays the comment number and the name of the person who entered the comment.



You can add information within an existing comment or respond to a comment with a secondary response comment. Response comments are indicated by the letter *R* followed by the response number in the comment header.

> **Strategy** Practice displaying only specific types of review markup.

➤ To insert a comment about selected text

1. On the **Review** tab, in the **Comments** group, click the **New Comment** button.
2. In the comment balloon, enter the comment.

➤ To hide or display comments

➜ On the **Review** tab, in the **Tracking** group, click the **Show Markup** button, and then click **Comments**.

➤ To display comments in the margin

➜ Turn on the display of comments. On the **Review** tab, in the **Tracking** group, click the **Show Markup** button, point to **Balloons**, and then click **Show Revisions in Balloons** or **Show Only Comments and Formatting in Balloons**.

➤ To display comments in the Reviewing Pane

➜ Turn on the display of comments. On the **Review** tab, in the **Tracking** group, click the **Reviewing Pane** arrow, and then click **Reviewing Pane Vertical** or **Reviewing Pane Horizontal**.

> **Tip** To change the size of the Reviewing Pane, point to its border and then, when the pointer changes to a double-headed arrow, drag the border.

➤ To display comments in ScreenTips

➜ Turn on the display of comments. On the **Review** tab, in the **Tracking** group, click the **Show Markup** button, point to **Balloons**, and then click **Show All Revisions Inline**.

➤ To display comments from a specific reviewer

1. On the **Review** tab, in the **Tracking** group, click the **Show Markup** button, and then point to **Reviewers**.
2. Click to place a check mark next to each reviewer whose comments you want to display, and click to clear the check mark next to each reviewer whose comments you want to hide.

➤ To move between comments

➜ On the **Review** tab, in the **Comments** group, click the **Previous** button or the **Next** button.

➤ To edit a comment

1. Display comments either in the Reviewing Pane or in balloons.
2. Click the comment, and then change the text by using normal editing techniques.

➤ **To respond to a comment**

1. Display comments either in the Reviewing Pane or in balloons.
2. Click the comment. Then on the **Review** tab, in the **Comments** group, click the **New Comment** button.
3. Enter your comment response.

➤ **To delete a comment**

1. Display comments either in the Reviewing Pane or in balloons.
2. Click the comment. Then on the **Review** tab, in the **Comments** group, click the **Delete** button.

   Or

   Right-click the comment, and then click **Delete Comment**.

Practice Tasks

The practice file for these tasks is located in the Word\Objective5 practice file folder. If you want to save the results of the tasks, save them in the same folder with *My* appended to the file name so that you don't overwrite the original practice file.

- Open the *Comments* document, and in the fifth column of the table, add the comment *They carry the new Ultra line* to the words *some good*. Then delete the comment associated with the word *competitors* in the first paragraph.
- In the *Comments* document, add *These are special order* in a new paragraph at the end of the second comment. Then respond to the comment associated with *Adequate* with a new comment balloon containing the text *If I were a real customer, I would have left*.

Objective Review

Before finishing this chapter, ensure that you have mastered the following skills:

5.1 Validate Content by Using Spelling and Grammar Checking Options

5.2 Configure AutoCorrect Settings

5.3 Insert and Modify Comments in a Document

6 Applying References and Hyperlinks

The skills tested in this section of the Microsoft Office Specialist exam for Microsoft Word 2010 relate to creating references and hyperlinks within documents. Specifically, the following objectives are associated with this set of skills:

6.1 Apply a Hyperlink
6.2 Create Endnotes and Footnotes
6.3 Create a Table of Contents

You may want to refer the reader of a document to another location in the document, to another document, or to a webpage for further information. You can do this by inserting a hyperlink in the document to the other location. You can also supply additional information to a reader by including footnotes or endnotes in the document. You can provide a master reference to the document content by including a table of contents that links the reader to the headings within the document.

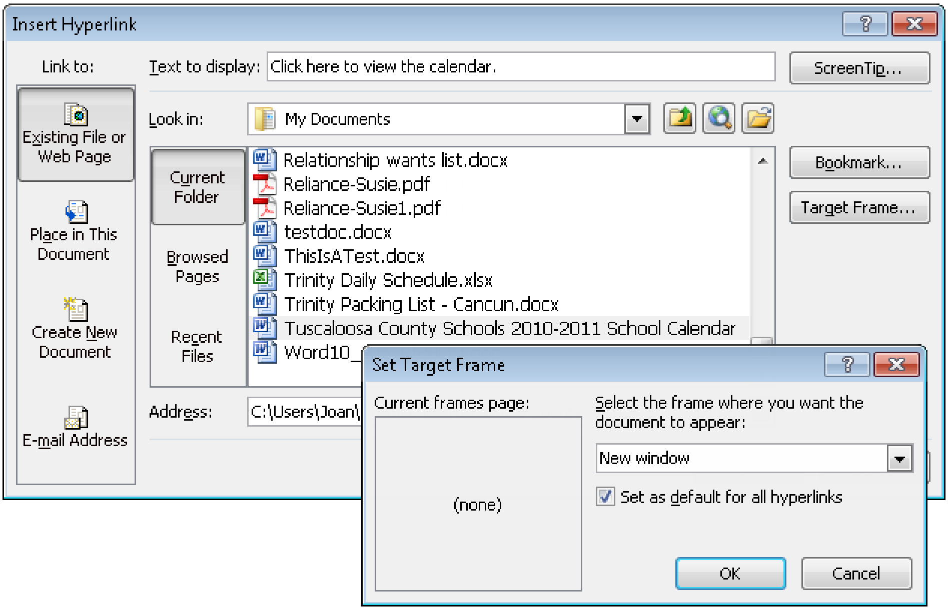
This chapter guides you in studying ways of inserting hyperlinks, ways of inserting endnotes and footnotes, and methods of creating a table of contents.

Practice Files Before you can complete the practice tasks in this chapter, you need to copy the book's practice files to your computer. The practice files you'll use to complete the tasks in this chapter are in the Word\Objective6 practice file folder. A complete list of practice files is provided in "Using the Book's Companion Content" at the beginning of this book.

6.1 Apply a Hyperlink

Inserting Hyperlinks

Like webpages, Word documents can include hyperlinks that provide a quick way to connect to related information, or to perform tasks such as opening another document, downloading a file, displaying a webpage, or sending an email message. You insert a hyperlink from text or a graphic element to a specific target file or location. You can specify whether the target information should be displayed in the same window or frame as the document or in a new window or frame. You can also specify default settings for all hyperlinks.



Within the document, hyperlinked text appears underlined and in the color specified for hyperlinks by the document's theme. (Hyperlinked graphics do not have a visual indicator.) You can display the hyperlink target by pointing to the hyperlinked text or graphic. You can jump to the hyperlink target by holding down the Ctrl key and clicking the linked text or graphic. After you click hyperlinked text, it appears in the color specified for followed hyperlinks.

➤ **To insert a hyperlink to a file**

1. Select the text or graphic object to which you want to attach the hyperlink.

> **Tip** You can change the selected text from within the Insert Hyperlink dialog box by changing it in the Text To Display box.

2. On the **Insert** tab, in the **Links** group, click the **Insert Hyperlink** button.

   Or

   Right-click the selection, and then click **Hyperlink**.
3. In the **Insert Hyperlink** dialog box, on the **Link to** bar, click the **Existing File or Web Page** button.
4. In the **Look in** area, browse to the file.

   Or

   In the **Address** box, enter the absolute path to the file.
5. Click **Target Frame**. In the **Set Target Frame** dialog box, specify where the hyperlink target will be displayed, and then click **OK**.
6. In the **Insert Hyperlink** dialog box, click **OK**.

➤ **To insert a hyperlink to a webpage**

1. Select the text or graphic object to which you want to attach the hyperlink, and then open the **Insert Hyperlink** dialog box.
2. On the **Link to** bar, click the **Existing File or Web Page** button.
3. In the **Address** box, enter the URL of the webpage.
4. Click **Target Frame**. In the **Set Target Frame** dialog box, select **New window**, and then click **OK**.
5. In the **Insert Hyperlink** dialog box, click **OK**.

➤ **To insert a hyperlink to a heading or bookmark within the document**

1. Select the text or graphic object to which you want to attach the hyperlink, and then open the **Insert Hyperlink** dialog box.
2. On the **Link to** bar, click the **Place in This Document** button.
3. In the **Select a place in this document** box, click the heading or bookmark.
4. In the **Insert Hyperlink** dialog box, click **OK**.

➤ **To insert a hyperlink that opens an email message form**

1. Select the text or graphic object to which you want to attach the hyperlink, and then open the **Insert Hyperlink** dialog box.
2. On the **Link to** bar, click **E-mail Address**.
3. In the **E-mail address** box, enter the email address to which you want to send the message.

   Or

   In the **Recently used email addresses** list, click the email address to which you want to send the message.
4. In the **Subject** box, enter the subject of the message.
5. In the **Insert Hyperlink** dialog box, click **OK**.

➤ **To modify a hyperlink**

1. Right-click the hyperlink, and then click **Edit Hyperlink**.
2. In the **Edit Hyperlink** dialog box, make the necessary changes, and then click **OK**.

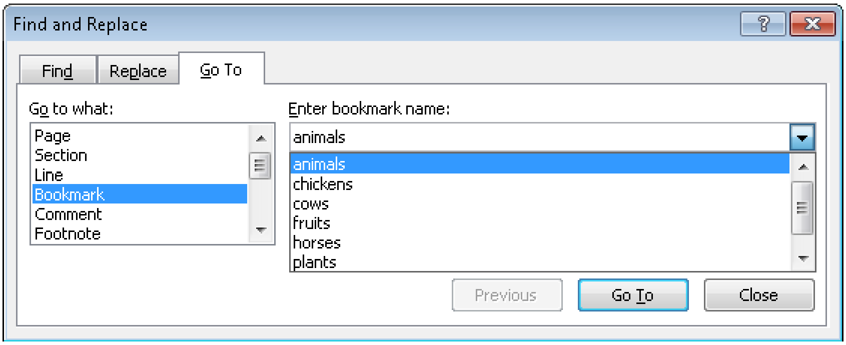
➤ **To remove a hyperlink**

➜ Right-click the hyperlink, and then click **Remove Hyperlink**.

Inserting Bookmarks

Whether you are creating a document or working in a document created by someone else, you can insert named bookmarks to identify information to which you might want to return later. (Word automatically creates bookmark names for headings down to the fourth level by duplicating the heading and then removing articles, spaces, and punctuation and capitalizing the first letter of each word.) You can move to bookmarked locations within a document either by creating hyperlinks to the bookmarks or by browsing to them.

> **Tip** **The automatically created bookmarks appear on the Place In This Document page of the Insert Hyperlink dialog box.**



➤ To insert a bookmark

1. Place the cursor at the location in which you want to insert the bookmark.

   Or

   Select the text or object to which you want to attach the bookmark.
2. On the **Insert** tab, in the **Links** group, click the **Bookmark** button.
3. In the **Bookmark** dialog box, enter a name for the bookmark in the **Bookmark name** box, and then click **Add**.

> **Tip** Bookmark names cannot contain spaces. If you enter a space and then type a character, the Add button becomes inactive. To name bookmarks with multiple words, either run the words together and capitalize each word or replace the spaces with underscores for readability.

➤ To move to a bookmark

1. Open the **Bookmark** dialog box, and then click the bookmark you want to move to.
2. Click **Go To**, and then click **Close**.

   Or

1. On the **Home** tab, in the **Editing** group, click **Go To** in the **Find** list.
2. On the **Go To** page of the **Find and Replace** dialog box, in the **Go to what** list, click **Bookmark**.
3. In the **Enter bookmark name** list, click the bookmark you want.
4. Click **Go To**, and then click **Close**.

Practice Tasks

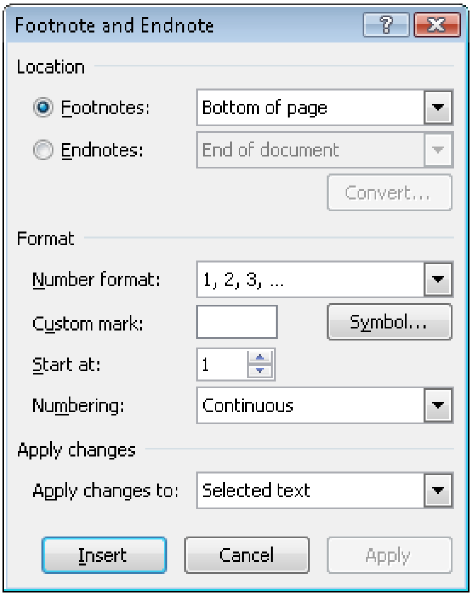
The practice files for these tasks are located in the Word\Objective6 practice file folder. If you want to save the results of the tasks, save them in the same folder with *My* appended to the file name so that you don't overwrite the original practice file.

- In the *Hyperlinks* document, create a hyperlink from the logo at the top of the page to the *OtherLogos* document. Then test the hyperlink.
- In the *Hyperlinks* document, create a hyperlink that, when clicked, creates an email message that is addressed to you and has a subject of *MOS Test Message*. Then test the hyperlink.

6.2 Create Endnotes and Footnotes

When you want to provide a reference or comment about a statement in a document—for example, to explain an assumption or cite the source for a different opinion—you can enter the comment as a footnote or as an endnote. Doing so inserts a number or symbol called a *reference mark*, and your associated comment appears with the same number or symbol either as a footnote or as an endnote. Footnotes appear either at the bottom of the page or immediately after the last text on the page. Endnotes appear at the end of the document or document section. In most views, footnotes or endnotes are divided from the main text by a note separator line.

Word applies default styles to the reference marks for footnotes and endnotes. By default, footnote reference marks use arabic numerals (1, 2, 3, and so on), and endnote reference marks use roman numerals (i, ii, iii, and so on). You can change the numbering and reference marks associated with footnotes and endnotes.



➤ To create a footnote or endnote

1. Place the cursor in the location from which you want to reference the footnote or endnote.
2. On the **References** tab, in the **Footnotes** group, click the **Insert Footnote** button or the **Insert Endnote** button.
3. In the linked area at the bottom of the page or end of the document or section, enter the note text.

➤ To change the number format of existing footnotes or endnotes

1. On the **References** tab, click the **Footnotes** dialog box launcher.
2. In the **Footnote and Endnote** dialog box, in the **Location** area, click **Footnotes** or **Endnotes**.
3. In the **Format** area, in the **Number format** list, click the format you want.
4. With **Whole document** shown in the **Apply changes to** box, click **Apply**.

➤ **To change the formatting of footnote or endnote reference marks**

1. In the document text, select the reference mark for any footnote or endnote.
2. On the **Home** tab, in the **Editing** group, click the **Select** button, and then click **Select Text with Similar Formatting**.
3. On the **Home** tab, apply the character formatting you want the reference marks to have.

➤ **To change the location of footnotes or endnotes**

1. On the **References** tab, click the **Footnotes** dialog box launcher.
2. In the **Footnote and Endnote** dialog box, do any of the following, and then click **OK**:
    - Click **Footnotes** and then, in the list, click **Bottom of page** or **Below text**.
    - Click **Endnotes** and then, in the list, click **End of document** or **End of section**.

➤ **To delete a footnote or endnote**

➜ In the document text, select the reference mark of the footnote or endnote you want to delete, and then press Delete.

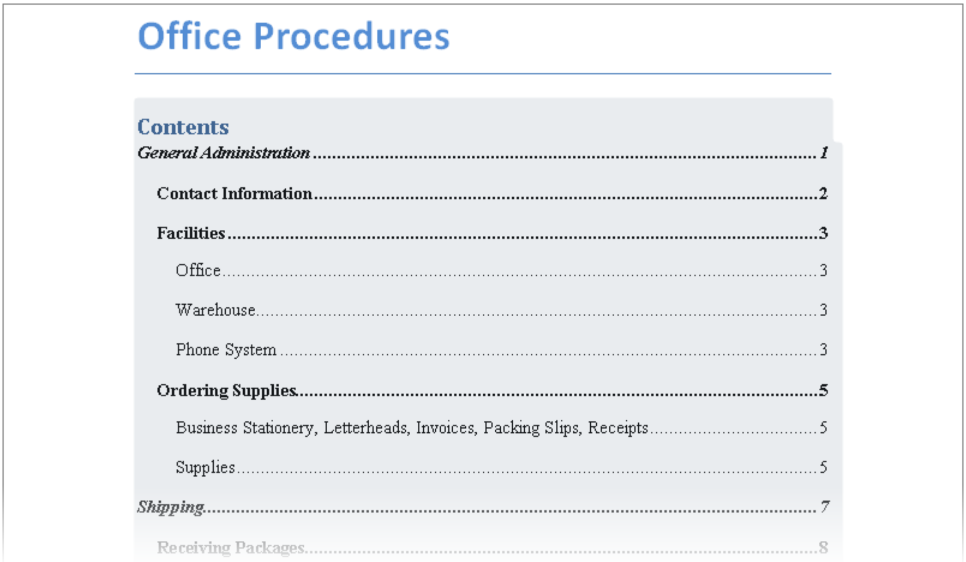
Practice Tasks

The practice file for this task is located in the Word\Objective6 practice file folder. If you want to save the results of the tasks, save them in the same folder with *My* appended to the file name so that you don't overwrite the original practice file.

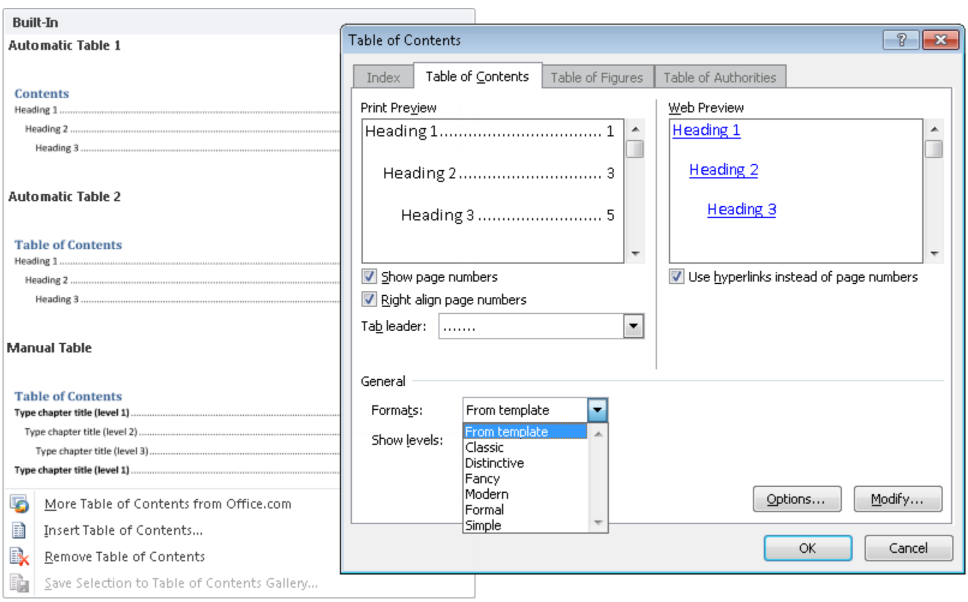
- In the *Footnotes* document, cut the last sentence from the end of the first paragraph to the Microsoft Office Clipboard. Then insert a footnote after the first sentence in the second paragraph, and paste the cut item as the text of the footnote.

6.3 Create a Table of Contents

If you create a long document divided into parts by headings you have designated by applying styles (Heading 1, Heading 2, and so on), you can add a table of contents (TOC) to the beginning of the document to give readers an overview of the document's contents and to help them find specific sections. If the document will be printed, you can indicate with a page number the starting page of each section. If the document will be distributed electronically, you can link each heading and subheading in the table of contents to the section in the document so that readers can jump directly there with a click of the mouse.



The Table Of Contents gallery offers three standard table formatting options that use nine levels of built-in TOC styles (TOC 1, TOC 2, and so on). If none of these formats meets your needs, you can choose from several other styles, such as Classic, Fancy, and Simple, in the Table Of Contents dialog box.



After you select the style you want, Word identifies the table of contents entries (based on the document heading levels) and creates the table at the cursor as one field. You can edit the text of a table of contents, but it is much easier to have Word update the table for you. You can tell Word to update only the page numbers, or if you have changed, added, or deleted headings, you can have Word update (re-create) the entire table.

> **Tip** You can change the formatting or content within the table, but any individual formatting changes you make will be lost if you update the table of contents. Therefore it is best to wait until the table of contents is complete before manually formatting any of its content.

> **See Also** For information about applying styles, see section 2.1, "Apply Font and Paragraph Attributes."

➤ To create a standard table of contents

1. Ensure that headings within the document are styled with Heading styles.
2. Position the cursor where you want to insert the table of contents.
3. On the **References** tab, in the **Table of Contents** group, click the **Table of Contents** button.
4. In the **Table of Contents** gallery, click the table of contents style you want.

➤ To create a custom table of contents

1. On the **References** tab, in the **Table of Contents** group, click the **Table of Contents** button, and then click **Insert Table of Contents**.
2. In the **Print Preview** area of the **Table of Contents** dialog box, do any of the following:
   - Show or hide the page number of each heading by selecting or clearing the **Show page numbers** check box.
   - Display page numbers at the right table margin or immediately following the heading by selecting or clearing the **Right align page numbers** check box.
   - Specify the characters that appear between the heading and the page number by clicking the **Tab leader** arrow and then clicking **(none)**, dots (**.......**), dashes (**-----**), or underscores (**_____**).

3. In the **Web Preview** area of the **Table of Contents** dialog box, specify whether page numbers are included in tables of contents created in web documents by selecting or clearing the **Use hyperlinks instead of page numbers** check box.
4. In the **General** area of the **Table of Contents** dialog box, do any of the following:
   - In the **Formats** list, select one of the default Word TOC formats.
   - In the **Show levels** list, enter or click to select the number of outline levels you want to include in the table of contents.
5. In the **Table of Contents** dialog box, click **OK**.

➤ To create a table of contents with custom TOC styles

1. Position the cursor where you want to insert the table of contents.
2. On the **References** tab, in the **Table of Contents** group, click the **Table of Contents** button, and then click **Insert Table of Contents**.
3. In the **Table of Contents** dialog box, click **Modify**.
4. In the **Style** dialog box, select a TOC style you want to modify, and then click **Modify**.
5. In the **Modify Style** dialog box, change the font, paragraph, tabs, border, and other formatting to suit your needs, and then click **OK**.
6. Repeat steps 4 and 5 to make additional style modifications. When you finish, click **OK** in the **Style** dialog box.
7. In the **Table of Contents** dialog box, click **OK**.

➤ To update a table of contents

1. Right-click the table of contents, and then click **Update Field**.
2. In the **Update Table of Contents** dialog box, click **Update page numbers only** or **Update entire table**, and then click **OK**.

   Or

1. Position the cursor in the table of contents.
2. On the **References** tab, in the **Table of Contents** group, click the **Update Table** button.
3. In the **Update Table Of Contents** dialog box, click **Update page numbers only** or **Update entire table**, and then click **OK**.

Practice Tasks

The practice file for these tasks is located in the Word\Objective6 practice file folder. If you want to save the results of the tasks, save them in the same folder with *My* appended to the file name so that you don't overwrite the original practice file.

- At the beginning of the *Contents* document, create a table of contents based on heading styles that uses the Classic format and dotted line page-number leaders.
- Insert manual page breaks within the *Contents* document, and then update the entire table of contents to reflect your changes.

Objective Review

Before finishing this chapter, ensure that you have mastered the following skills:

6.1 Apply a Hyperlink
6.2 Create Endnotes and Footnotes
6.3 Create a Table of Contents

7 Performing Mail Merge Operations

The skills tested in this section of the Microsoft Office Specialist exam for Microsoft Word 2010 relate to merging data into documents. Specifically, the following objectives are associated with this set of skills:

7.1 Set Up Mail Merge

7.2 Execute Mail Merge

Many businesses and other organizations communicate with their customers or members by means of letters, newsletters, and promotional pieces that are sent to everyone on a mailing list. The easiest way to generate a set of documents that are identical except for certain information—such as the name and address of the recipient—is to use the mail merge process. You can use the mail merge process to easily produce a set of personalized documents and mailing labels.

This chapter guides you in studying the steps required to create form letters, email messages, envelopes, labels, catalogs, and directories that contain variable information. You study how to set up source documents, set up mail merge documents manually or by using the Mail Merge wizard, check mail merge documents for errors, preview mail merge operations, and produce merged documents in various final delivery formats.

Practice Files **Before you can complete the practice tasks in this chapter, you need to copy the book's practice files to your computer. The practice files you'll use to complete the tasks in this chapter are in the Word\Objective7 practice file folder. A complete list of practice files is provided in "Using the Book's Companion Content" at the beginning of this book.**

7.1 Set Up Mail Merge

Preparing Source Documents

The mail merge process combines static information stored in one document (the main document) with variable information stored in another document (the data source). The main document contains the static text that will appear in all the merged documents. It also contains placeholders—called *merge fields*—that tell Word where to insert the variable information. The data source contains the variable information. You can prepare either source document first, but because you must insert the correct merge field names into the main document, it can be useful to prepare the data source first.

Preparing a Data Source

A valid data source is a structured document, such as a Word table, Microsoft Excel worksheet, Microsoft Access database table, or Microsoft Outlook contact list, that contains sets of information—called *records*—in a predictable format.

A typical data source file consists of a matrix of rows and columns. Each row contains one record, such as the complete name and address of a customer, and each column contains a particular type of information—called a *field*—such as the first name of all the customers. In the first row of the data source, each field is identified by its column header—called a *field name*.

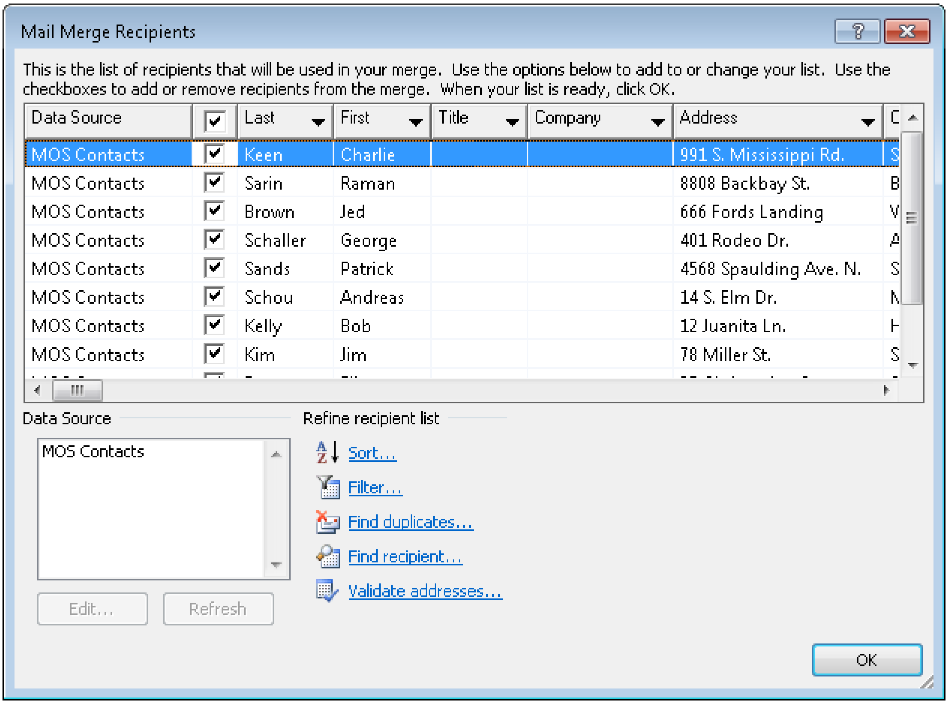
	A	B	C	D	E	F
1	FirstName	LastName	Address1	City	State	PostalCode
2	Charlie	Keen	991 S. Mississippi Rd.	St. Louis	MO	89203
3	Raman	Sarin	8808 Backbay St.	Boston	MA	88337
4	Jed	Brown	666 Fords Landing	Westover	WV	66954
5	George	Schaller	401 Rodeo Dr.	Auburn	WA	34923
6	Patrick	Sands	4568 Spaulding Ave. N.	Seattle	WA	12345
7	Andreas	Schou	14 S. Elm Dr.	Moscow	ID	02912
8	Bob	Kelly	12 Juanita Ln.	Helena	MT	42665
9	Jim	Kim	78 Miller St.	Seattle	WA	81233
10	Eli	Bowen	27 Christopher St.	Seattle	WA	67645
11	Colleen	Bracy	18 Elm St.	Tulalip	WA	77483

Field names

Record

> **Tip** **Because field names are also used as the merge fields in the main document, they cannot contain spaces. To make the field names readable with no spaces, capitalize each word, as in *PostalCode*, or replace the spaces with underscores, as in *Last_Name*.**

You can select recipients by entering them into a new recipient list, by referencing an existing data source, or by importing an Outlook contact list. When you import an Outlook contact list, all the contacts contained therein are automatically selected as recipients.



➤ To create a recipient list by entering information

1. On the **Mailings** tab, in the **Start Mail Merge** group, click the **Select Recipients** button, and then click **Type New List**.
2. In the **New Address List** dialog box, enter the first recipient's information.
3. For each additional recipient, click **New Entry** (or press Tab) and then enter the recipient's information.
4. When the recipient list is complete, click **OK**.
5. In the **Save Address List** dialog box displaying the contents of your My Data Sources folder, enter a name for the recipient list file, and then click **Save**.

➤ To select recipients from an existing file

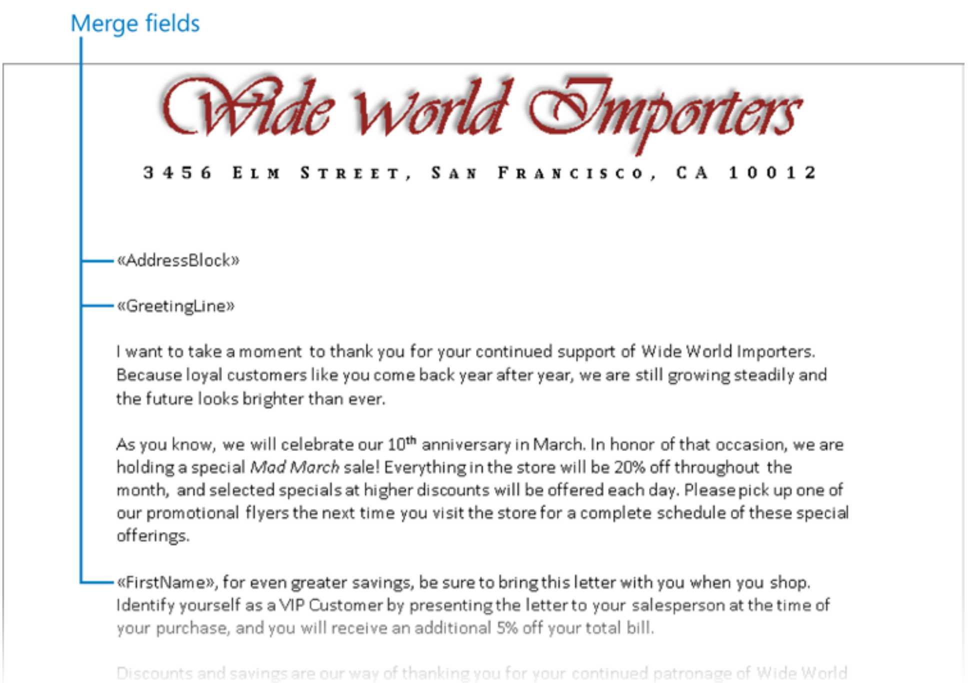
1. On the **Mailings** tab, in the **Start Mail Merge** group, click the **Select Recipients** button, and then click **Use Existing List**.
2. In the **Select Data Source** dialog box, browse to and select the file containing the recipient list. Then click **Open**.

➤ To select recipients from an Outlook contact list

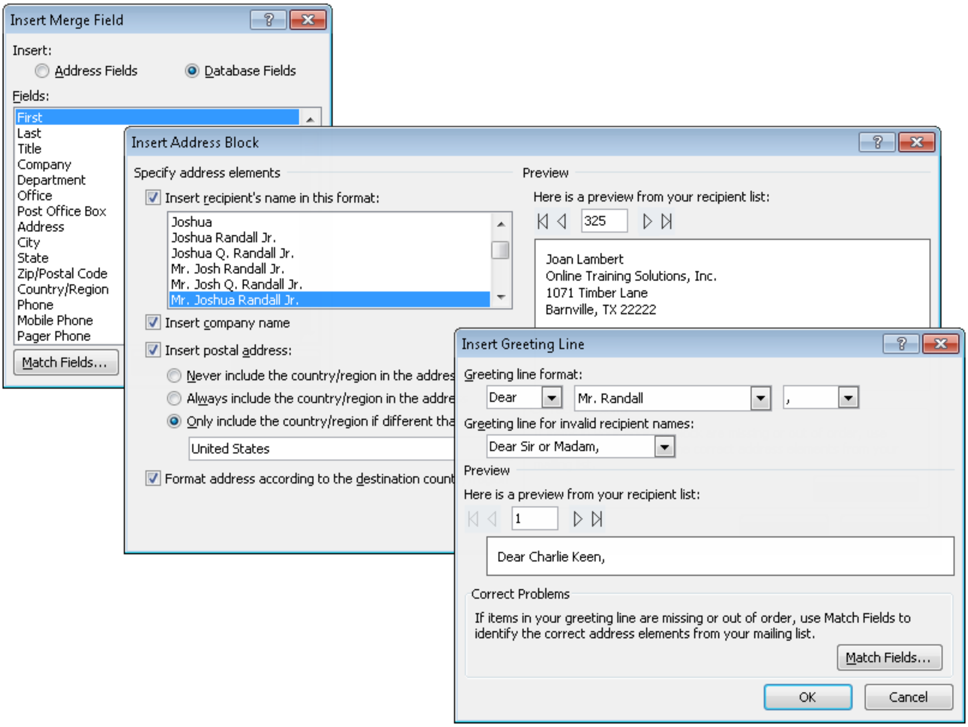
1. Start Outlook and, if necessary, provide the credentials for your email account.
2. In Word, on the **Mailings** tab, in the **Start Mail Merge** group, click the **Select Recipients** button, and then click **Select from Outlook Contacts**.
3. In the **Select Contacts** dialog box, click the contact list you want to reference, and then click **OK**.
4. To use only a subset of the contacts in the contact list, do one of the following in the **Mail Merge Recipients** dialog box:
   - Clear the check box located between *Data Source* and *Last* in the list header to clear all the selection check boxes. Then select only the recipients you want.
   - Clear the selection check boxes of individual recipients.

Preparing a Main Document

You can create a Word document and then use it as the main document for a mail merge process, or you can create a document specifically for the mail merge process. Either way, you insert merge fields into the document in the location in which you want to insert variable information from the data source.



You can insert specific named merge fields or you can insert an address block or greeting line (salutation) that you tailor to suit your needs.



➤ To insert a single merge field

➜ On the **Mailings** tab, in the **Write & Insert Fields** group, click the **Insert Merge Field** arrow and then, in the list, click the merge field you want to insert.

➤ To insert multiple merge fields

1. On the **Mailings** tab, in the **Write & Insert Fields** group, click the **Insert Merge Field** button.
2. In the **Insert Merge Field** dialog box, for each field you want to insert, click the field and then click **Insert**. After you insert the fields you want, click **Close**.

➤ To insert an address block

1. On the **Mailings** tab, in the **Write & Insert Fields** group, click the **Address Block** button.
2. In the **Insert Address Block** dialog box, specify the address elements you want to include, and preview the results. Then click **OK**.

➤ **To insert a greeting line**

1. On the **Mailings** tab, in the **Write & Insert Fields** group, click the **Greeting Line** button.
2. In the **Insert Greeting Line** dialog box, select the format of the salutation you want to use for recipients whose records include the salutation's required elements, and select the generic salutation you want to use for other recipients. Then click **OK**.

Merging Source Documents

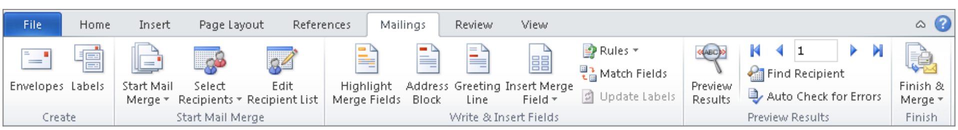
You can merge a main document with a data source manually or by using the Mail Merge wizard.

Setting Up a Manual Mail Merge

Strategy Be familiar with the different types of mail merge documents you can create.

The first step in the manual mail merge process is to specify the type of merge documents you want to create: letters, email messages, envelopes, labels, or a directory. You then select or create a data source and identify the records in the data source that you want to include in the mail merge operation. You create your main document and insert merge fields from the data source into it. You preview the results and check for errors, and then you merge the documents.

You perform all of these steps by using the commands available on the Mailings tab of the ribbon.



See Also For information about selecting data sources, creating data sources, and inserting fields, see the "Preparing Source Documents" topic earlier in this section. For information about previewing and completing mail merge operations, see section 7.2, "Execute Mail Merge."

➤ **To set up a manual mail merge for letters**

1. Open a new blank document.
2. On the **Mailings** tab, in the **Start Mail Merge** group, click the **Start Mail Merge** button, and then click **Letters**.

3. On the **Mailings** tab, in the **Start Mail Merge** group, click the **Select Recipients** button, and click the type of data source you will use. Then select or create the data source, and refine the recipient list as appropriate.
4. In the document, enter the static text that you want to appear in all letters.
5. Position the insertion point in a location where you want to insert variable information from the data source, and then use the commands in the **Write & Insert Fields** group on the **Mailings** tab to insert the fields you want.

➤ **To set up a manual mail merge for email messages**

1. Open a new blank document.
2. On the **Mailings** tab, in the **Start Mail Merge** group, click the **Start Mail Merge** button, and then click **E-mail Messages**.
3. On the **Mailings** tab, in the **Start Mail Merge** group, click the **Select Recipients** button, and click the type of data source you will use. Then select or create the data source, and refine the recipient list as appropriate.
4. In the Word document, enter the content of the email message and merge fields for any variable information from the data source that you want to include.

➤ **To perform a manual mail merge for an envelope based on an address in a document**

1. In the document, select only the lines of the address. (Do not select any blank lines above or below the address.)
2. On the **Mailings** tab, in the **Create** group, click the **Envelopes** button.
3. In the **Envelopes and Labels** dialog box, do the following if necessary:
   - Edit the address in the **Delivery address** box.
   - Enter a return address in the **Return address** box.

   > **Tip** You can have Word supply the return address. Display the Advanced page of the Word Options dialog box. Toward the bottom of the page, under General, enter the return address in the Mailing Address box, and click OK. The address then appears by default as the return address in the Envelopes And Labels dialog box. If you want to use envelopes with a preprinted return address, you must select the Omit check box to avoid duplication.

   - Click **Options**, select the envelope size, the feed method (horizontally or vertically and face up or face down), and the font and font size of both the address and the return address.

4. In the **Envelopes and Labels** dialog box, do one of the following:
   - To print the envelope, insert an envelope in the printer according to the selected feed method, and then click **Print**.
   - To have Word insert the address in the format required for an envelope on a separate page at the beginning of the current document, click **Add to Document**.

➤ To set up a manual mail merge for multiple envelopes

1. Open a new blank document, and display paragraph marks.
2. On the **Mailings** tab, in the **Start Mail Merge** group, click the **Start Mail Merge** button, and then click **Envelopes**.
3. In the **Envelope Options** dialog box, do the following, and then click **OK**:
   - On the **Envelope Options** page, choose the envelope size and specify the font and location for the delivery address and the return address.
   - On the **Printing Options** page, verify that the selected printer is the one you want to use, specify the way you will insert the envelopes into the printer, and choose the feed location. (For envelopes, this is usually *manual paper feed*.)
4. On the **Mailings** tab, in the **Start Mail Merge** group, click the **Select Recipients** button, and click the type of data source you will use. Then select or create the data source, and refine the recipient list as appropriate.
5. In the document formatted by Word to match your selections, position the cursor at the upper-left paragraph mark and then enter the return address as you want it to appear on all envelopes.
6. Position the insertion point at the centered paragraph mark. On the **Mailings** tab, in the **Write & Insert Fields** group, click the **Address Block** button.
7. In the **Insert Address Block** dialog box, specify the address elements you want to include, and preview the results. Then click **OK**.

➤ To set up a manual mail merge for labels

1. Select labels of an appropriate size for your purpose. Note the brand name and product number.
2. Open a new blank document, and display paragraph marks.

3. On the **Mailings** tab, in the **Start Mail Merge** group, click the **Select Recipients** button, and click the type of data source you will use. Then select or create the data source, and refine the recipient list as appropriate.
4. On the **Mailings** tab, in the **Start Mail Merge** group, click the **Start Mail Merge** button, and then click **Labels**.
5. In the **Label Options** dialog box, do the following, and then click **OK**:
   - In the **Printer information** area, click the type of printer you intend to use. If you choose **Page printers**, select the printer tray.
   - In the **Label information** area, click the label brand in the **Label vendors** list, and then click the product number in the **Product number** list.

     Or

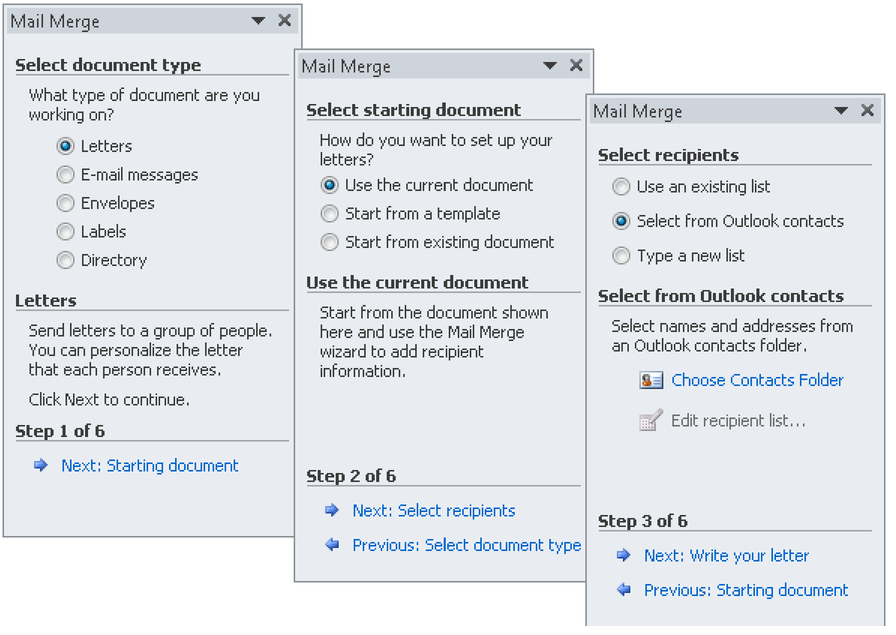
     To set up the mail merge for custom labels, click **New Label**. In the **Label Details** dialog box, enter a name, margin dimensions, page size, and the number of labels across and down each sheet. Then click **OK**.
6. In the document formatted by Word to match your selections, position the cursor in the first cell. On the **Mailings** tab, in the **Write & Insert Fields** group, click the **Address Block** button.
7. In the **Insert Address Block** dialog box, specify the address elements you want to include, and preview the results. Then click **OK**.

➤ To set up a manual mail merge for a catalog or directory

1. Open a new blank document, and display paragraph marks.
2. On the **Mailings** tab, in the **Start Mail Merge** group, click the **Start Mail Merge** button, and then click **Directory**.
3. On the **Mailings** tab, in the **Start Mail Merge** group, click the **Select Recipients** button, and click the type of data source you will use. Then select or create the data source, and refine the recipient list as appropriate.
4. In the Word document, enter the merge fields you want to include in the catalog or directory, and then press Enter. Ensure that a blank paragraph mark ends the main document.

Setting Up a Mail Merge by Using the Mail Merge Wizard

The Mail Merge wizard guides you through the process of merging a main document and a data source.



See Also For information about selecting data sources, creating data sources, and inserting fields, see the "Preparing Source Documents" topic earlier in this section. For information about previewing and completing mail merge operations, see section 7.2, "Execute Mail Merge."

➤ To set up mail merge for letters by using the Mail Merge wizard

1. Create a document containing the text of the letter.
2. On the **Mailings** tab, in the **Start Mail Merge** group, click the **Start Mail Merge** button, and then click **Step by Step Mail Merge Wizard**.
3. In the **Mail Merge** task pane, with the **Letters** option selected, at the bottom of the pane, click **Next: Starting document**.
4. With the **Use the current document** option selected, click **Next: Select recipients**.
5. With the **Using an existing list** option selected, click **Browse**. Then in the **Select Data Source** dialog box, identify the data source, and click **Open**.

6. If necessary, in the **Select Table** dialog box, click the table you want to use as your data source, and then click **OK**.
7. In the **Mail Merge Recipients** dialog box, sort or filter the records as necessary, and then click **OK**.
8. At the bottom of the **Mail Merge** task pane, click **Next: Write your letter**, and then insert the required merge fields in the main document, either by clicking items in the task pane or by clicking buttons in the **Write & Insert Fields** group on the **Mailings** tab.

> **Tip** Clicking Address Block or Greeting Line opens a dialog box in which you can refine the fields' settings, whereas clicking individual fields from the Insert Merge Field list inserts them with their default settings.

➤ **To set up mail merge for email messages by using the Mail Merge wizard**

1. Create a document containing the text of the email message.
2. On the **Mailings** tab, in the **Start Mail Merge** group, click the **Start Mail Merge** button, and then click **Step by Step Mail Merge Wizard**.
3. In the **Mail Merge** task pane, click **E-mail messages**, and then click **Next: Starting document**.
4. With the **Use the current document** option selected, click **Next: Select recipients**.
5. Click **Select from Outlook contacts**, and then click **Choose Contacts Folder**. If the **Choose Profile** dialog box opens, select the Outlook profile from which you want to choose your recipients, and then click **OK**. Then in the **Select Contacts** dialog box, identify the data source, and click **OK**.
6. In the **Mail Merge Recipients** dialog box, sort or filter the records as necessary, and then click **OK**.
7. In the **Mail Merge** task pane, click **Next: Write your e-mail message**, and insert the necessary merge fields.
8. Preview the merged email messages, and then click **Next: Complete the merge**.
9. Click **Electronic Mail**, and in the **Merge to E-mail** dialog box, do the following:
   - Verify that **Email_Address** is selected in the **To** box.
   - Enter a message subject in the **Subject line** box.
   - Select the message format you want in the **Mail format** box.
10. With the **All** option selected in the **Send records** area, click **OK**.

➤ To set up mail merge for envelopes by using the Mail Merge wizard

1. Open a new blank document, and display paragraph marks.
2. On the **Mailings** tab, in the **Start Mail Merge** group, click the **Start Mail Merge** button, and then click **Step by Step Mail Merge Wizard**.
3. On the **Select document type** page of the **Mail Merge** task pane, click **Envelopes**, and then click **Next: Starting document**.
4. With **Change document layout** selected on the **Starting document** page, click **Envelope options**.
5. In the **Envelope Options** dialog box, do the following, and then click **OK**:
   - On the **Envelope Options** page, choose the envelope size, and specify the font and location for the delivery address and the return address.
   - On the **Printing Options** page, verify that the default printer shown is the one you want to use, specify the way you will insert the envelopes into the printer, and choose the feed location. (For envelopes, this is usually manual feed.)
6. At the bottom of the **Mail Merge** task pane, click **Next: Select recipients**.
7. On the **Select recipients** page, click the type of data source you will use. Then select or create the data source, and refine the recipient list as appropriate.
8. At the bottom of the **Mail Merge** task pane, click **Next: Arrange your envelope**.
9. In the document formatted by Word to match your selections, position the cursor at the upper-left paragraph mark, and then enter the return address as you want it to appear on all envelopes.
10. Position the cursor at the centered paragraph mark. On the **Arrange your envelope** page of the **Mail Merge** task pane, click **Address Block**.
11. In the **Insert Address Block** dialog box, specify the address elements you want to include, and preview the results. Then click **OK**.

➤ To set up mail merge for labels by using the Mail Merge wizard

1. Open a new blank document.
2. On the **Mailings** tab, in the **Start Mail Merge** group, click the **Start Mail Merge** button, and then click **Step by Step Mail Merge Wizard**.
3. On the **Select document type** page of the **Mail Merge** task pane, click **Labels**, and then click **Next: Starting document**.

4. With **Change document layout** selected on the **Starting document** page, click **Label options**.
5. In the **Label Options** dialog box, do the following, and then click **OK**:
    - In the **Printer information** area, click the type of printer you intend to use. If you choose **Page printers**, select the printer tray.
    - In the **Label information** area, click the label brand in the **Label vendors** list, and then click the product number in the **Product number** list.

      Or

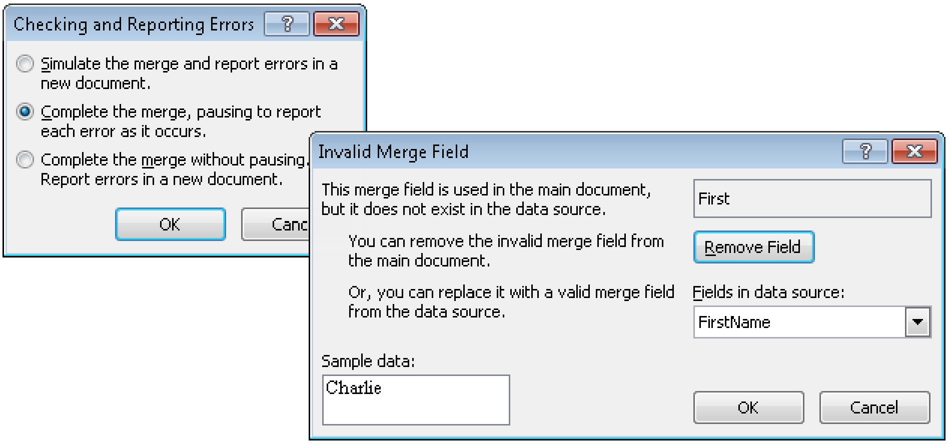
      To set up the mail merge for custom labels, click **New Label**. In the **Label Details** dialog box, enter a name, margin dimensions, page size, and the number of labels across and down each sheet. Then click **OK**.
6. At the bottom of the **Mail Merge** task pane, click **Next: Select recipients**.
7. On the **Select recipients** page, click the type of data source you will use. Then select or create the data source, and refine the recipient list as appropriate.
8. At the bottom of the **Mail Merge** task pane, click **Next: Arrange your labels**, and then ensure that you can see the left edge of the main document.
9. With the cursor positioned in the first cell, click **Address block** on the **Arrange your labels** page.
10. In the **Insert Address Block** dialog box, click **OK** to accept the default settings.
11. In the **Mail Merge** task pane, click **Update all labels**.

➤ To set up mail merge for a catalog or directory by using the Mail Merge wizard

1. Open a new blank document, and display paragraph marks.
2. On the **Mailings** tab, in the **Start Mail Merge** group, click the **Start Mail Merge** button, and then click **Step by Step Mail Merge Wizard**.
3. In the **Mail Merge** task pane, click **Directory**, and then click **Next: Starting document**.
4. In the **Mail Merge** task pane, with the **Directory** option selected, at the bottom of the pane, click **Next: Starting document**.
5. With the **Use the current document** option selected, click **Next: Select recipients**.
6. In the **Mail Merge** task pane, click the type of data source you will use. Then select or create the data source, and refine the recipient list as appropriate.
7. At the bottom of the **Mail Merge** task pane, click **Next: Arrange your directory**, and insert the necessary merge fields.

Checking for Errors

You can validate that a main document and data source will merge successfully by using the Auto Check feature. When running an automatic check, you can simulate or complete the merge. You can display errors on screen as the merge occurs, or write errors to a separate document.



➤ **To validate a mail merge operation before merging source documents**

1. Prepare the main document and data source, and set up the mail merge for the type of output you want.
2. On the **Mailings** tab, in the **Preview Results** group, click the **Auto Check for Errors** button.
3. In the **Checking and Reporting Errors** dialog box, click **Simulate the merge and report errors in a new document**. Then click **OK**.
4. For each error that the Auto Check feature reports, in the **Invalid Merge Field** dialog box, click **Remove Field** or choose the matching field from the **Fields in data source** list.

➤ **To validate a mail merge operation while merging source documents**

1. Prepare the main document and data source, and set up the mail merge for the type of output you want.
2. On the **Mailings** tab, in the **Preview Results** group, click the **Auto Check for Errors** button.

3. In the **Checking and Reporting Errors** dialog box, do one of the following, and then click **OK**:
   - Click **Complete the merge, pausing to report each error as it occurs**, and then click **OK**.
   - Click **Complete the merge without pausing. Report errors in a new document**, and then click **OK**.
4. For each error that the Auto Check feature reports, in the **Invalid Merge Field** dialog box, click **Remove Field** or choose the matching field from the **Fields in data source** list.

Practice Tasks

The practice files for these tasks are located in the Word\Objective7 practice file folder. Save the results of the tasks in the same folder for reuse in section 7.2.

- Set up a form letter using the *AnniversaryLetter* document as the main document and the *CustomerList* workbook as the data source.
- At the top of the main document, insert merge fields for a standard address and an informal greeting line. At the beginning of the third paragraph, insert a merge field for the recipient's first name, type a comma followed by a space, and change *For* to *for*.
- Before merging the source documents, edit the data source from within Word to include the following contact:

  Heidi Steen

  678 Pine Street

  Agriculture, WA 10003
- Before merging the source documents, sort the recipient list in ascending order by postal code.
- Without merging the source documents, save the main document as *AnniversaryFormLetter*. Check the document for errors, and then retain it for use in the section 7.2 practice tasks.
- Create a sheet of labels for all the records in the *CustomerList* workbook other than the two recipients whose addresses are not in the state of Washington (WA). Save the label document as *MyMergedLabels*, and then close it.

7.2 Execute Mail Merge

Previewing the Results of a Mail Merge Operation

After you specify the data source you want to use and enter merge fields in the main document, you can preview the merged documents before performing the actual merge. You can exclude recipients during this preview.

Wide World Importers

3456 Elm Street, San Francisco, CA 10012

Charlie Keen
991 S. Mississippi Rd.
St. Louis, MO 89203

Dear Charlie Keen,

I want to take a moment to thank you for your continued support of Wide World Importers. Because loyal customers like you come back year after year, we are still growing steadily and the future looks brighter than ever.

➤ **To preview the results of a mail merge operation**

1. On the **Mailings** tab, in the **Preview Results** group, click the **Preview Results** button.
2. In the **Write & Insert Fields** group, click the **Highlight Merge Fields** button. Verify that the highlighted merge fields are correctly specified and placed.
3. In the **Preview Results** group, click the **Next Record** button or **Previous Record** button to display each merged document that will be generated. Click the **First Record** button or **Last Record** button to display the first or last merged document that will be generated.
4. To preview the mail merge results for a specific record, click the **Find Recipient** button in the **Preview Results** group. In the **Find Entry** dialog box, enter a name or other record detail in the **Find** box, and then click **Find Next**.

Or

1. Display the **Preview your e-mail messages** page of the **Mail Merge** task pane.
2. In the **Mail Merge** task pane, click the **Next Record** button or **Previous Record** button to display each merged document that will be generated.
3. To preview the mail merge results for a specific record, click **Find a recipient**. In the **Find Entry** dialog box, enter a name or other record detail in the **Find** box, and then click **Find Next**.

➤ To exclude a displayed recipient from a mail merge operation

➜ On the **Preview your e-mail messages** page of the **Mail Merge** task pane, under **Make changes**, click **Exclude this recipient**.

Completing the Mail Merge Operation

When you are ready, you can either send the merged documents directly to the printer or you can merge them one after the other into a new document, separated by page breaks. If you merge to a new document, you have another chance to review and, if necessary, edit the merged documents before sending them to the printer.

➤ To execute a manual mail merge operation to a new document

1. On the **Mailings** tab, in the **Finish** group, click the **Finish & Merge** button, and then click **Edit Individual Documents**.
2. In the **Merge to New Document** dialog box, specify the records that you want to include in the merge document, and then click **OK**.

➤ To execute a mail merge operation to a new document from the Mail Merge wizard

1. In the **Mail Merge** task pane, display the **Complete the merge** page.
2. In the **Mail Merge** task pane, click **Edit individual letters**.

> **Tip** The Edit link reflects the type of mail merge document you're working with.

3. In the **Merge to New Document** dialog box, click **All**, and then click **OK**.

➤ To execute a manual mail merge operation to an email message

1. On the **Mailings** tab, in the **Finish** group, click the **Finish & Merge** button, and then click **Send E-mail Messages**.
2. In the **Merge to E-mail** dialog box, do the following, and then click **OK**:
   - In the **Message options** area, ensure that the correct field appears in the **To** list, enter the message subject in the **Subject line** box, and choose the message format you want from the **Mail format** list.
   - In the **Send records** area, indicate the records to which you want to send the email message.

➤ **To execute a mail merge operation to an email message from the Mail Merge wizard**

1. In the **Mail Merge** task pane, display the **Complete the merge** page.
2. In the **Merge** section of the **Mail Merge** task pane, click **Electronic mail**.
3. In the **Merge to E-mail** dialog box, enter the subject of the email message in the **Subject line** box, and then click **OK**.

➤ **To execute a mail merge operation to a printer from the Mail Merge wizard**

1. In the **Mail Merge** task pane, display the **Complete the merge** page.
2. In the **Mail Merge** task pane, click **Print**.
3. In the **Merge to Printer** dialog box, specify the range of records you want to merge to the printer, and then click **OK**.
4. In the **Print** dialog box, select the printer you want to use, and then click **OK**.

Practice Tasks

The practice files for these tasks are located in the Word\Objective7 practice file folder. You will need to complete the practice tasks in section 7.1 before performing the tasks in this section.

- Preview the results of the mail merge operation that will be executed by merging the *AnniversaryFormLetter* document you created in the tasks for section 7.1 with the *CustomerList* workbook.
- Exclude the recipient *Garth Fort* from the mail merge operation.
- Merge the source files to a new document that contains all the letters. Save the document as *MyMergedLetters*, and close it.

Objective Review

Before finishing this chapter, ensure that you have mastered the following skills:

7.1 Set Up Mail Merge
7.2 Execute Mail Merge