

Word 2007 Advanced: Part I

Stephen Moffat, The Mouse Training Company

 Microsoft®
Office 2007

Word: Advanced Part I



Stephen Moffat, The Mouse Training Company

Word 2007 Advanced

Part I



Word 2007 Advanced: Part I
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Introduction

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

How To Use This Guide

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

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

Instructions

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

Appendices

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

Keyboard

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

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

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

Commands

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

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

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

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

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

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

Section 1 Advanced tables

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

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

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Tables – advanced features

Moving And Copying

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

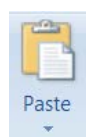
Using Cut/Copy & Paste

► To move or copy a row/column:

Mouse



1. Select the row to be moved/copied or select the column to be moved/copied.
2. Click on the **Cut/Copy** button.
3. Select the row where you want to paste (Word pastes above) or select the column where you want to paste (Word pastes to the left).
4. Click on the **Paste** button



Using Drag & Drop

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

► To Move the selection:

Mouse

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

To Copy the selection:

Mouse

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

Splitting A Table

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

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

Mouse

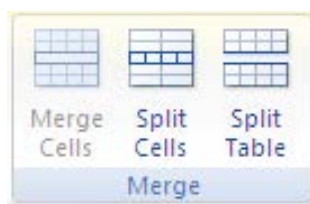
1. Select the cell(s) you wish to split
2. Go to the **MERGE** group on the **LAYOUT** ribbon and click the **SPLIT TABLE** button.

Or

Keyboard

1. Press **CTRL SHIFT ENTER**
2. To rejoin tables that have been split, simply delete the paragraph marker between them.

Merging And Splitting Cells



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

► To split cells

Mouse

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

► To merge cells

Mouse

1. Select the cells you wish to merge.
2. Go to the **merge** group on the **layout** ribbon and click the **merge cells** button.

► To split Table

Mouse

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

Table size and alignment

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

Advanced Column Width Techniques

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

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

--	--	--

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



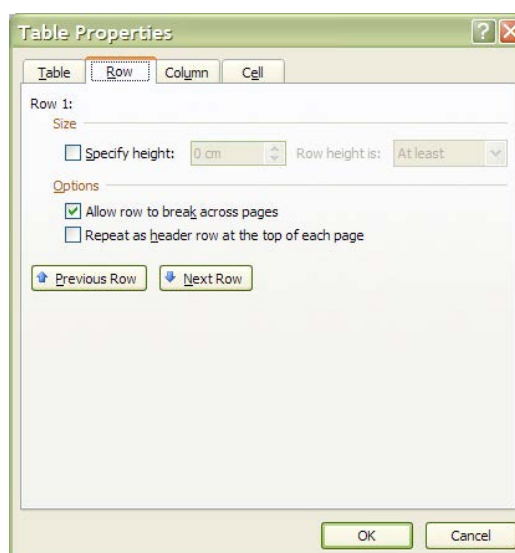
Column 2 becomes narrower

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



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

Row Height



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

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

► To change the row height:

Mouse

1. Select the rows where the height is to be changed
2. Choose **Properties** from the **design** ribbon
3. Select the **Row** Tab in the dialog
4. Use the **Row height is:** field to set a precise size

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

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

Using The Ruler

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

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

Table Alignment

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

► To change table alignment:

Mouse

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

Indenting Rows

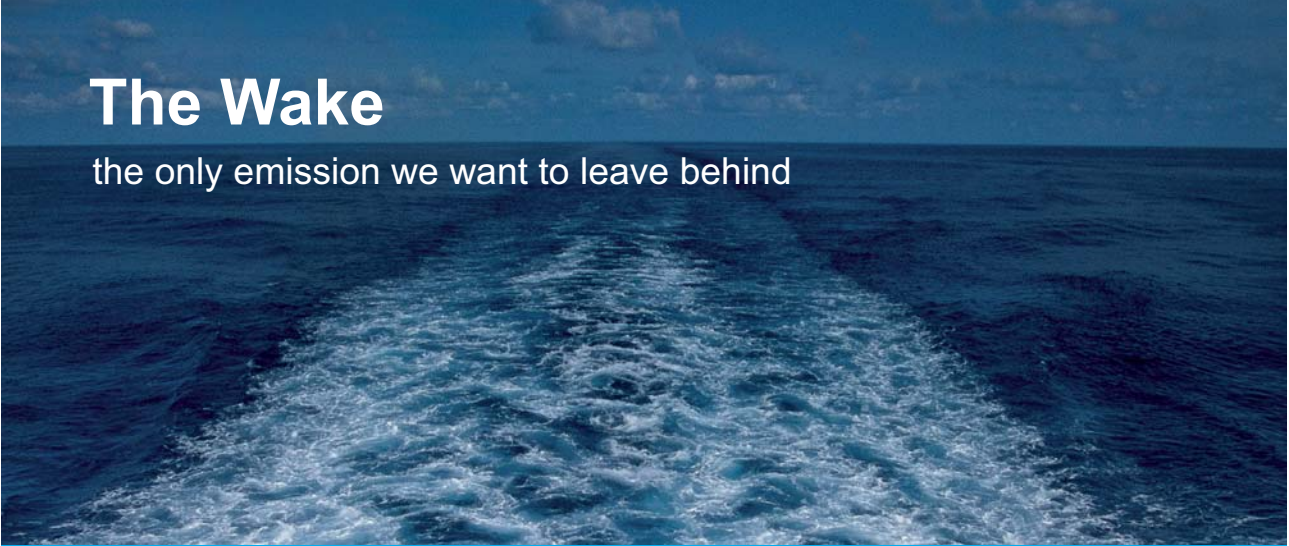
The whole table or individual rows may also be indented.

► To indent table rows:

Mouse

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

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



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Sorting Cells

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

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

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

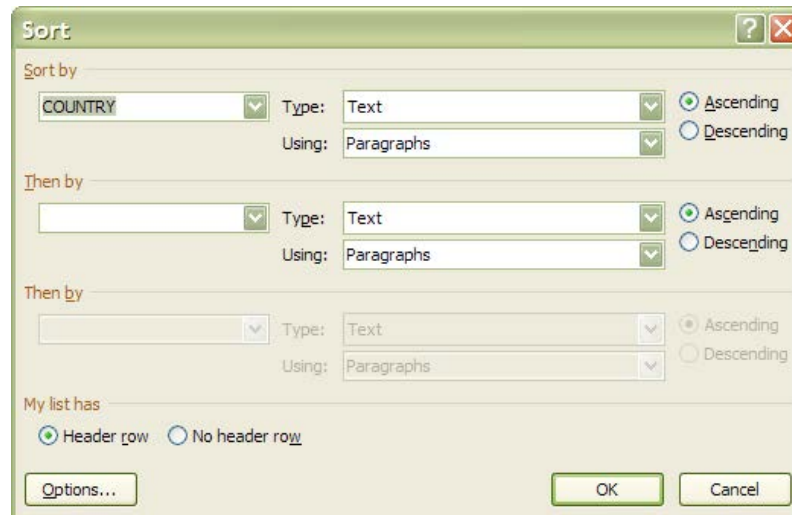
► To sort the table:

Mouse

1. Select the table.



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



5. Select the **type** of information in that column (Text, Number or Date).

6. Choose the **sort order** (Ascending or Descending).
7. Repeat this process in the **Then by** field if you are sub-sorting.

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

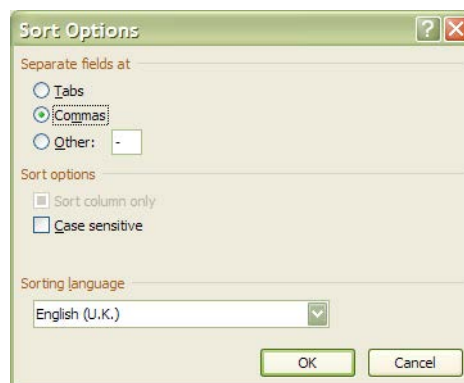
COUNTRY	YEAR	INVESTMENT
Albania	1998	1,867,659.00
Romania	1998	867,482,475.00
Bulgaria	1999	657,948,945.00
Turkmenistan	1999	768,958,372.00

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

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

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

Sort A Single Column In A Table



► To sort a single column

Mouse

1. Select the column that you want to sort.
2. Under **TABLE TOOLS**, on the **LAYOUT** ribbon, in the **DATA** group, click **SORT**.
3. Under **MY LIST HAS**, click **HEADER ROW** or **NO HEADER ROW**.
4. Click **OPTIONS**.
5. Under **SORT OPTIONS**, select the **SORT COLUMN ONLY** check box.
6. Click **OK**.

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

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

► To sort a table by multiple columns

Mouse

1. Select the column that you want to sort.
2. Under **TABLE TOOLS**, on the **LAYOUT** ribbon, in the **DATA** group, click **SORT**.
3. Under **MY LIST HAS**, click **HEADER ROW** or **NO HEADER ROW**.
4. Click **OPTIONS**.
5. Under **SEPARATE FIELDS AT**, click the type of character that separates the words or fields that you want to sort, and then click **OK**.
6. Under **SORT BY**, in the **USING** list, select which word or field you want to sort by.
7. In the first **THEN BY** list, enter the column that contains the data that you want to sort by, and then in the **USING** list, select which word or field you want to sort by.
8. If you want to sort by an additional column, repeat this step in the second **THEN BY** list.
9. Click **OK**.

The advertisement features a circular logo on the left with three stylized human figures in the center, surrounded by four gears and four arrows pointing clockwise. To the right of the logo, the text 'UNLEASHING CHANGE MANAGEMENT' is written in large, bold, blue capital letters. Below this, the dates 'OCTOBER 18 & 19, 2018' and the location 'DE RODE HOED AMSTERDAM' are listed in smaller blue capital letters. At the bottom, there is a silhouette of an Amsterdam cityscape including a windmill, a bridge, and several buildings. In the bottom left corner, the text 'Global Executive Events' is written in a serif font.

Table Formulas

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

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

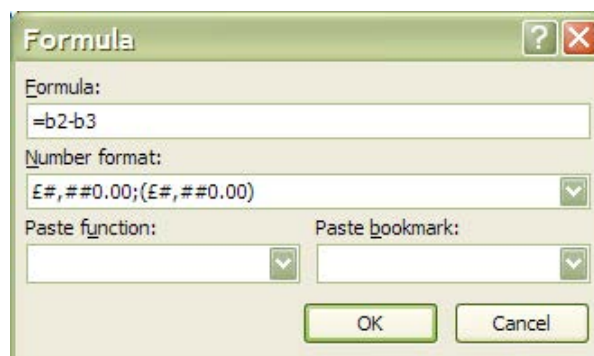
Formula used to work out profit

► To create a formula:

Mouse



1. Position the mouse in the destination cell
2. Under **TABLE TOOLS**, on the **LAYOUT** ribbon, in the **DATA** group, click **FORMULA**.



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

Formatting Numbers

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

Updating The Formula

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

► To update a formula's result:

Keyboard

1. Click on the cell containing the result
2. Press **F9**.

AutoSum

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

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

Functions

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

=COUNT(ABOVE)

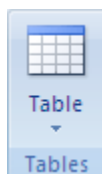
Nesting Functions

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

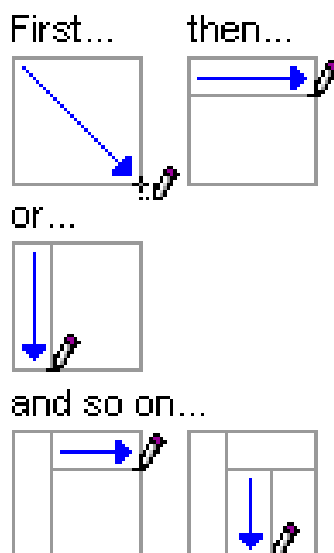
=IF(MAX(ABOVE)>50000,"WELL DONE","TRY HARDER")

Draw A Table

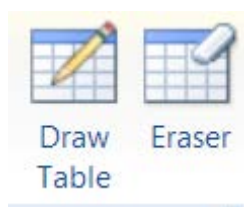
You can draw a complex table — E.G. one that contains cells of different heights or a varying number of columns per row.



1. Click where you want to draw the table.
2. On the **INSERT** ribbon, in the **TABLES** group, click **TABLE**.
3. Click **DRAW TABLE**.
4. The pointer changes to a pencil.
5. To define the outer boundaries of the table, draw a rectangle.
6. Draw column and row lines inside the rectangle.






7. To erase a line or block of lines, under **TABLE TOOLS**, on the **DESIGN** ribbon, in the **DRAW BORDERS** group, click **ERASER**.



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

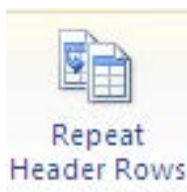
Chart Options

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

	<p>Align Top Left, Centre & Right - Aligns the text contained within the selected table or cells at the top of the cell.</p>	<p>Layout, alignment</p>
	<p>Align Centre Left, Centre & Right - Aligns the text contained within the selected table or cells in the centre of the cell.</p>	<p>Layout, alignment</p>
	<p>Align Bottom Left, Centre & Right, - Aligns the text contained within the selected table or cells at the bottom of the cell.</p>	<p>Layout, alignment</p>

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

Repeating Table Headings



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

► To repeat table headings:

Mouse

1. Select the row(s) that you wish to repeat at the top of each page that the table prints on.
2. Go to the **DATA** group on the **LAYOUT** ribbon and click the **REPEAT HEADER ROWS** button
You will only see the repeating headings when you are in Print Layout or Print preview

Use Table Styles To Format An Entire Table

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

1. Click in the table that you want to format.
2. click the **DESIGN** ribbon. In the **TABLE STYLES** group, rest the pointer over each table style until you find a style that you want to use.



3. To see more styles, click the **MORE** arrow .
4. Click the style to apply it to the table.

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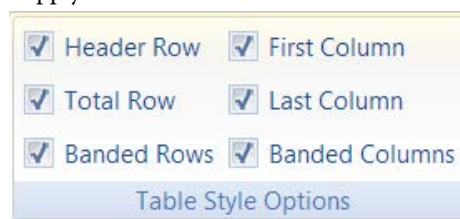
Management Time Management

Problem solving Self-Confidence Effectiveness

Project Management Goal setting Motivation Coaching



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



Section 2 Advanced formatting techniques

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

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

Styles

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

Default Styles

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

Normal Style

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

Headings 1 - 9

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

Default Paragraph Font

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

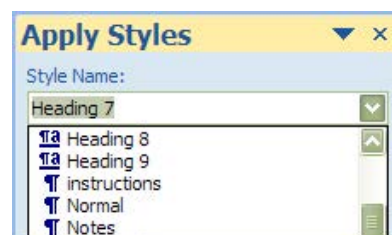
You can choose from a variety of methods to apply styles to existing text in a document.

► To apply a style using the Quick style gallery:

Mouse



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



► To - apply a style - dialog

Keyboard

1. Press **CTRL SHIFT S**, followed by **↓**
2. Select a style from the dialog that appears..


► To apply a style using a shortcut key:

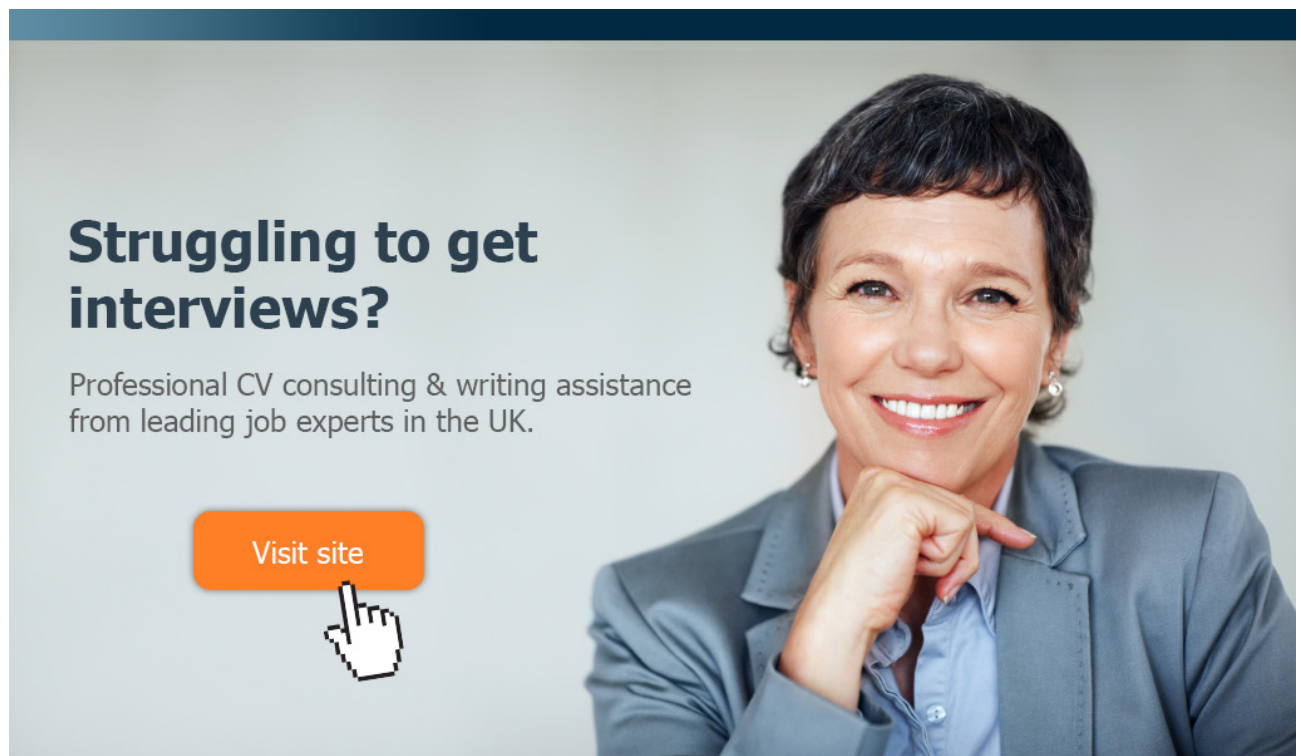
Keyboard

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

► To apply a style from styles task pane

Mouse


1.  Click on the **DIALOG BOX LAUNCHER** on the **STYLES** group on the **HOME** ribbon
2. Select any style visible



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► To change to another style:

Mouse

1. Select the paragraph(s) to be changed
2. Click on the required style from the Style window.

Creating New Quick Styles

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

► To create a new style:

Mouse

1. Select the paragraph(s) that you want to apply the new style to
2. Change the format of the font, paragraph etc. as required
3. Go to the **STYLES** group on the **HOME** ribbon
4. Select the down arrow to the bottom right of the visible style to open the gallery
5. Select **SAVE SELECTION AS NEW QUICK STYLE** from the available choices.
6. New style will be found in the **QUICK STYLE GALLERY**.



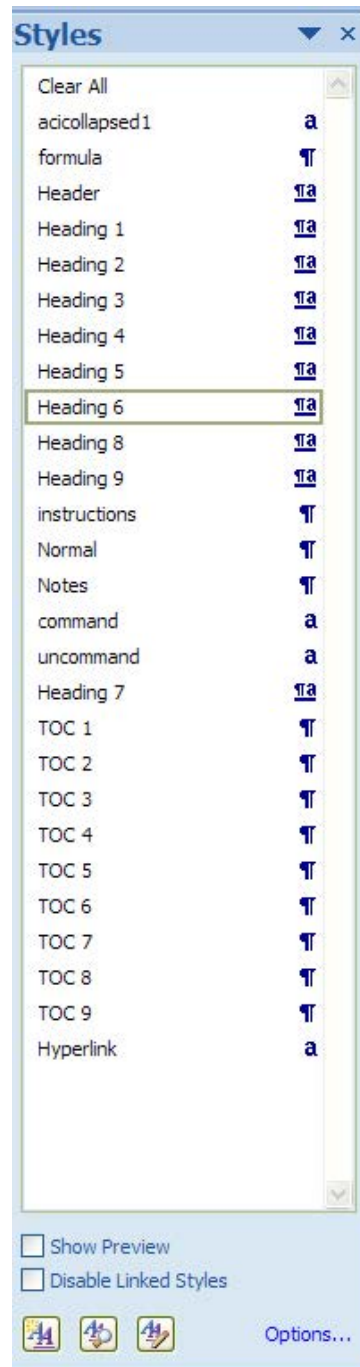
It is also possible to create a new style using the styles task pane. The window can be opened by Clicking on the **DIALOG BOX LAUNCHER** on the **STYLES** group on the **HOME** ribbon



Adding & Removing Styles From Gallery

► To move a style to the Quick Styles gallery

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




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



2. Under **SELECT STYLES TO SHOW**, click **ALL STYLES**.

Or

1.  On the **HOME** ribbon, click the **STYLES DIALOG BOX LAUNCHER**,
2. Move your mouse over the style you wish to appear in the quick styles gallery a drop down arrow will appear to the right of the style.
3. Click drop down arrow and select **ADD TO QUICK STYLE GALLERY**


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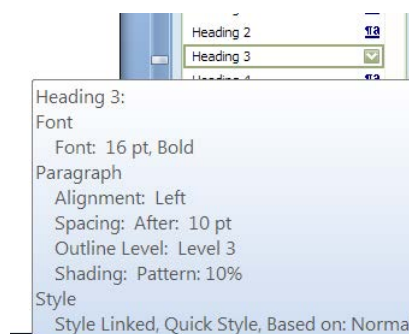
► To Remove a style from the Quick Styles gallery

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

Or


1.  On the **Home** ribbon, click the **Styles Dialog Box Launcher**,
2. Move your mouse over the style you want to remove from the quick styles gallery a drop down arrow will appear to the right of the style.
3. Click drop down arrow and select **Remove from quick style gallery**
*Removing a style from the Quick Styles gallery does not remove the style from the the entries that appear in the **Styles** task pane. The **Styles** task pane lists all of the styles in the document.*

Edit A Styles Format



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

► To edit a style

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

5. Click **UPDATE TO MATCH SELECTION**.


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

Following Styles

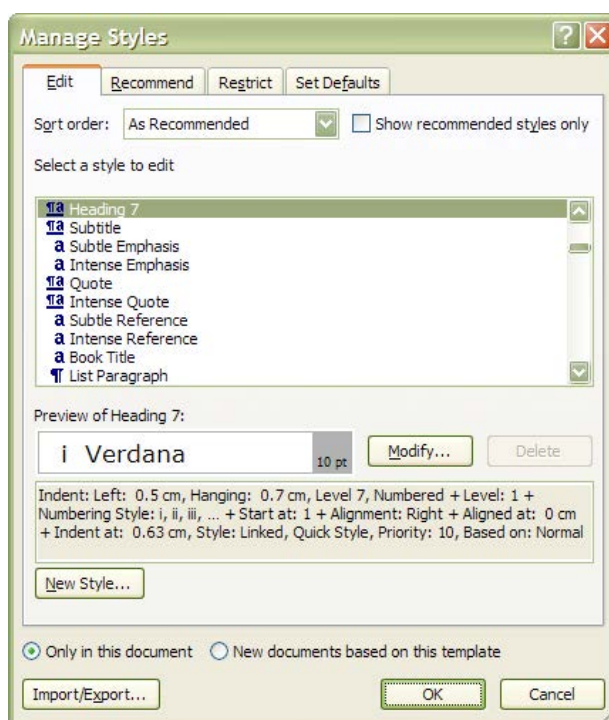
Having Word apply another existing style to a following paragraph increases the speed of document creation by saving the time taken to apply the next style. E.G. a chapter heading may be typed using the Heading 1 style and when **ENTER** is pressed the style is automatically changed to the Heading 2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

► To specify a style for the following paragraph:

Mouse

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

Modifying A Style With Style Task Pane



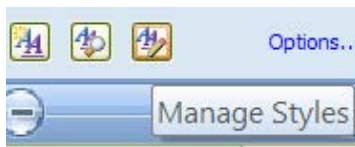
Styles can also be created and updated using the **MODIFY** command from the **MANAGE STYLES** dialog. You can set many more options for the style if you create or redefine it in this way.

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

► To access the Style dialog:

Mouse

1. On the **HOME** ribbon, click the **STYLES DIALOG BOX LAUNCHER**,



2. Click on the **MANAGE STYLES** button, in the **STYLES** task pane a dialog opens.
3. Find the name of the style you wish to change
4. Select style and click **MODIFY**

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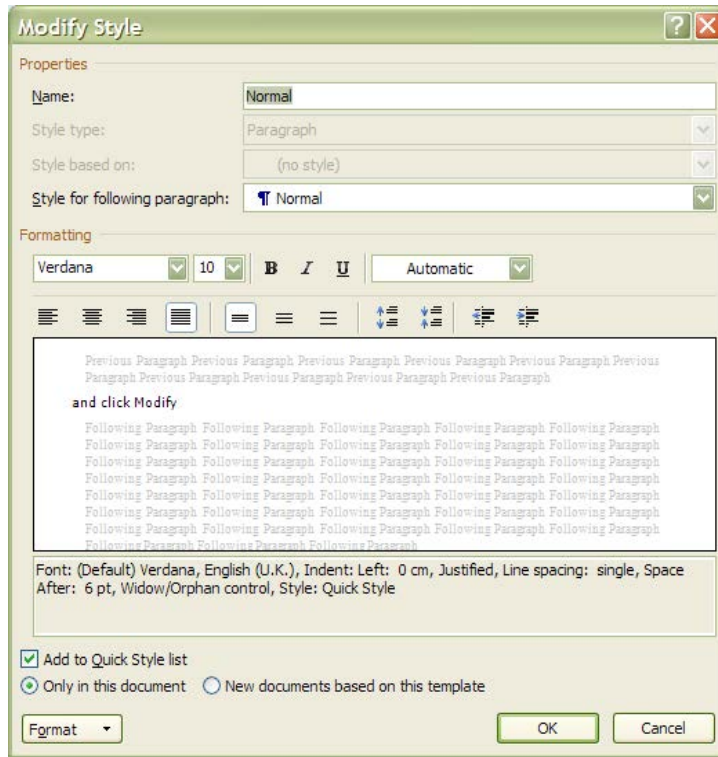
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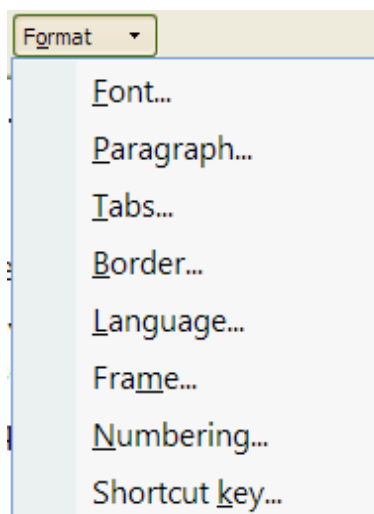
5. Type or select the name of an existing style on which to base the style you are creating.



Style For Following Paragraph

6. Select the style that you want to apply to the next new paragraph you type following a paragraph formatted with the new style you are creating.
 E.G. When creating a Chapter Heading style, you might select the Heading 1 style in the Style For Following Paragraph box. This means that when you press **ENTER** at the end of a paragraph formatted with the Chapter Heading style, Word automatically applies the Heading 1 style to the next new paragraph.

Format button



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

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

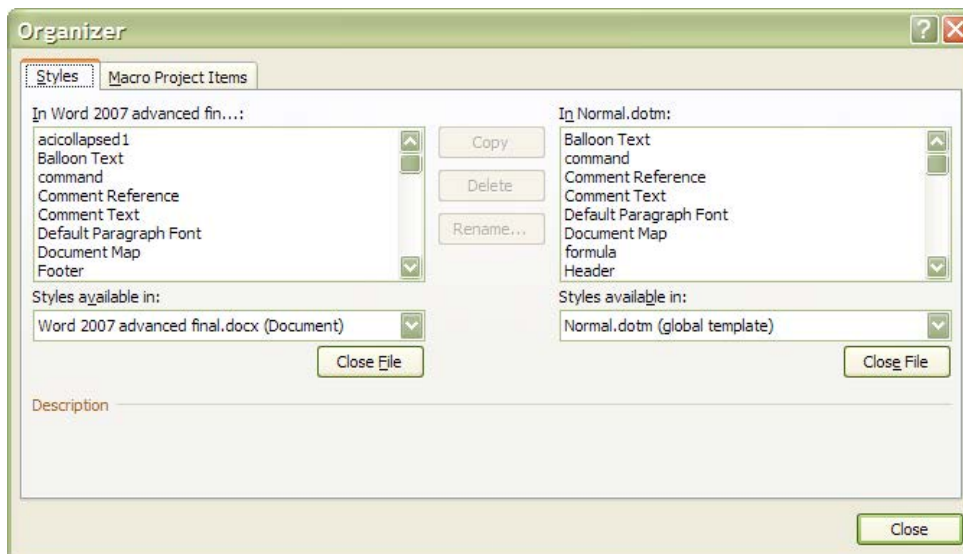
Copying Styles Between Documents

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

► To copy a style from one document to another:

Mouse

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



3. Click on the **IMPORT/EXPORT** button
4. Copy items to or from a different template or file; click **CLOSE FILE** to close the active document and its attached template or to close the Normal template. Then click **OPEN FILE**, and open the template or file you want.
5. Click the items you want to copy in either list, and then click **COPY**
6. The list of styles on the left-hand side of the dialog belongs to the current document.
7. To specify the document which will be receiving the new style(s):
8. Click on the **CLOSE FILE** button (on the right-hand side of the dialog)
9. The button will then change to an **OPEN FILE** button, click on this to select the target document
10. Select the style(s) in the left-hand list, and click on the **COPY** button.

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

Copying To/From Document Templates

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

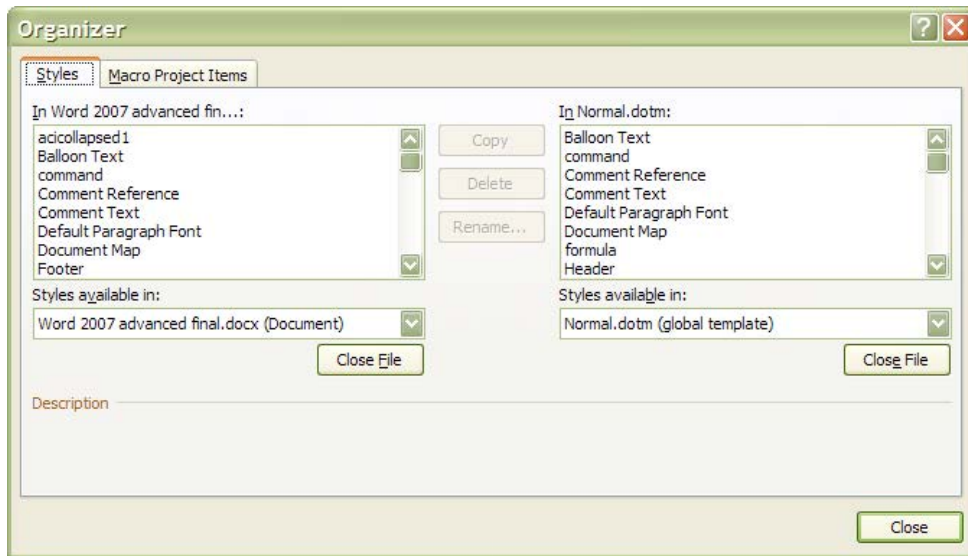
Updating the Template

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

► To update the template with the new styles:

Mouse

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



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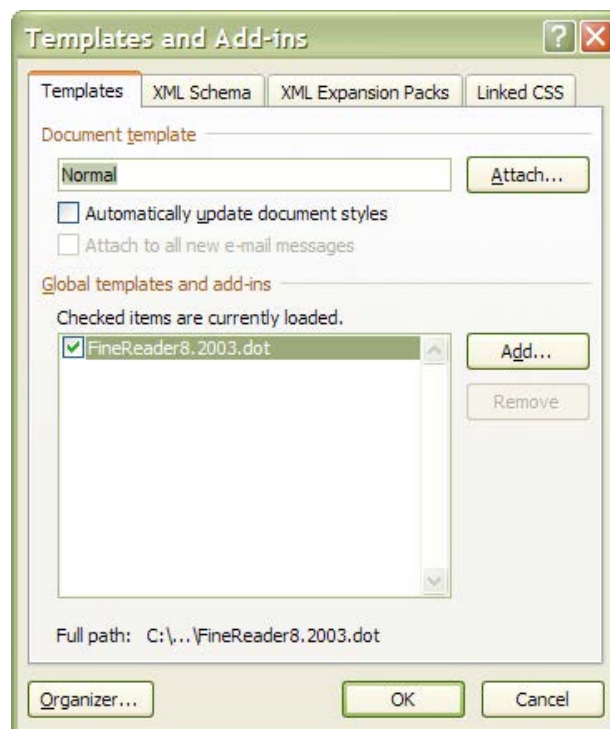
3. Click on the **IMPORT/EXPORT** button
4. Word initially assumes that you want to copy the styles to NORMAL.DOTM To select the underlying document template:
5. Click on the **CLOSE FILE** button (on the right-hand side of the dialog)
6. The button will then change to an **OPEN FILE** button, click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


Updating A Document

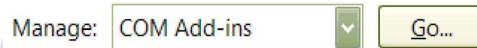
The method of copying styles from the template back into existing documents is much simpler.

To Update Document Styles With Template Styles:

Mouse



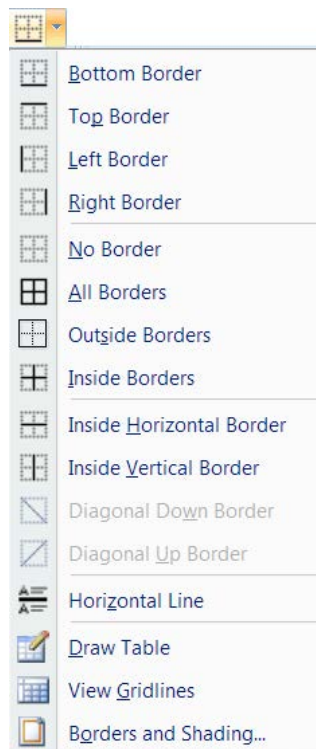
1. Open the document which needs updating
2.  Click the **OFFICE BUTTON** and click on **WORD OPTIONS** select **ADD-INS**. Select which add-in to manage from the drop down box near the bottom of the screen (templates) and click **GO** a dialog appears



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

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

Borders
















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

► To add a border to a paragraph:

Mouse

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

The buttons on the palette perform the following functions:

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


Changing The Paragraph Border Width

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

► To reduce the width of the border:

Mouse

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



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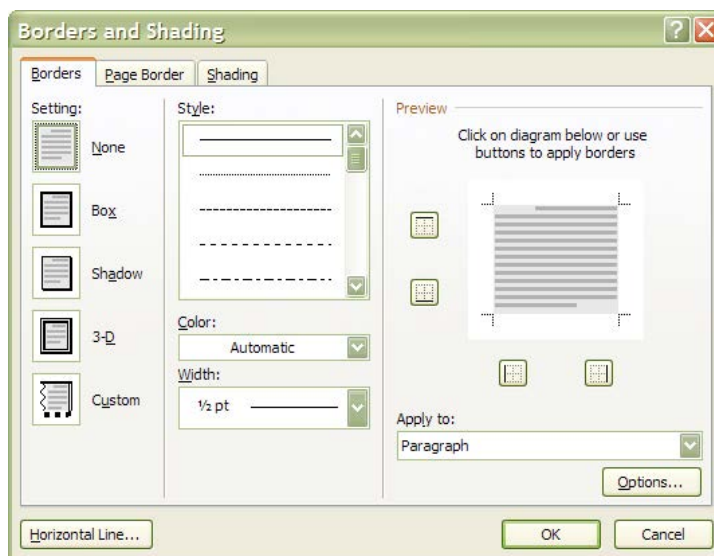
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More Borders Via The Dialog Box

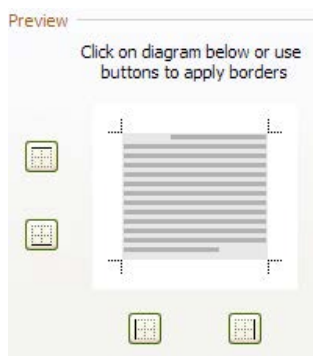
Borders can be added using the borders dialog available from the borders drop down button. Applying borders in this way gives you more options as to line style, shading and so on.



► To apply borders using the Borders and Shading dialog:

Mouse

1. Select the paragraph(s).to be bordered
2. Click the drop down arrow to the right of the borders button in the **PARAGRAPH** group and select **BORDERS AND SHADING** the following dialog appears.
3. Click on the **BORDERS** tab.

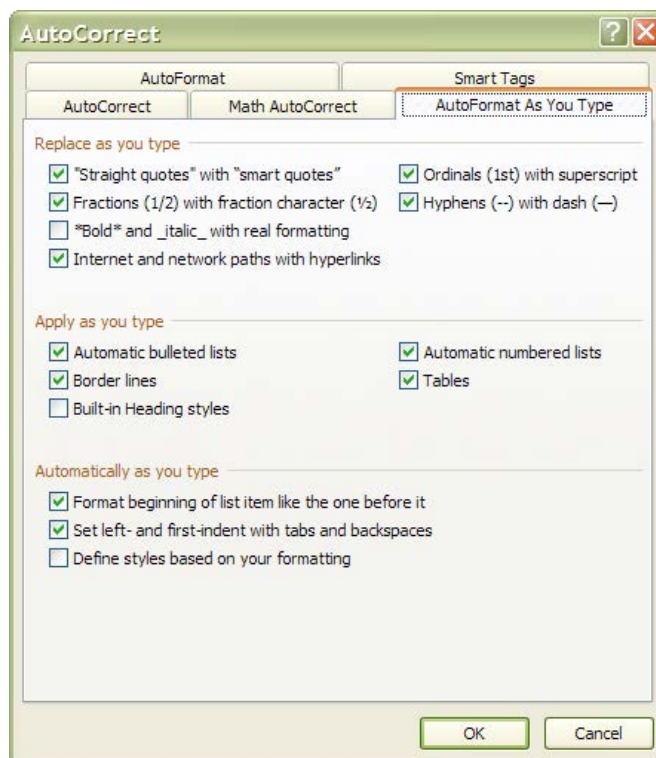


4. Choose the required border style
5. Select a thickness or colour for the border

6. Select an option from the left on where to apply the border **OR** Use one of the buttons on the left hand side of dialog to apply different borders top, bottom, left or right
7. Click **OK** to apply borders to selected text

Defining Styles Automatically

Using autocorrect



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



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

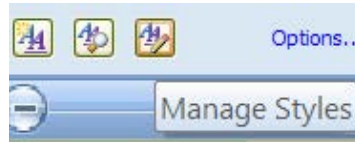
Styles can also be updated automatically when *manual* formatting is applied to text that is already formatted with a specific style.

Using the style option

► To have Word automatically update a style:

Mouse

1.  On the **HOME** ribbon, click the **STYLES DIALOG BOX LAUNCHER**,
- 2) Click on the **MANAGE STYLES** button, in the **STYLES** task pane a dialog opens.



3. Find the name of the style you wish to change
4. Select style and click **Modify**
5. Select the **Automatically update** check box.
The Normal style cannot be updated automatically.

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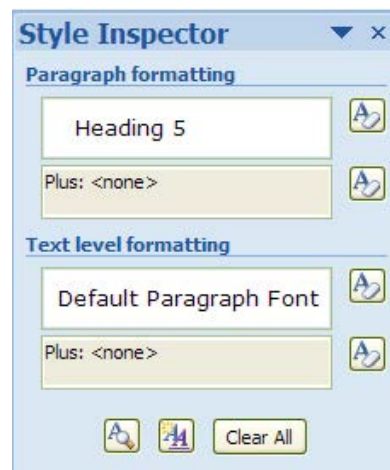
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Style Inspector

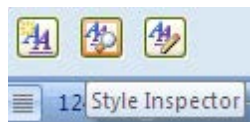


The style inspector gives you a preview and analysis of the style of any text you happen to click on with options to clear any aspects of the style that don't meet with your approval or to clear all. For a further breakdown click on the reveal formatting button on the bottom left of the window to give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

► To show style inspector

Mouse

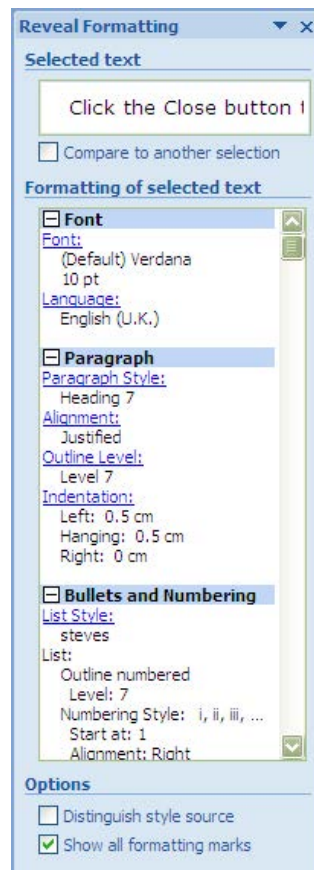
1.  On the **HOME** ribbon, click the **STYLES DIALOG BOX LAUNCHER**,



2. Click on the **STYLE INSPECTOR** button, in the **STYLES** task pane a dialog opens.

► To reveal formatting

Mouse



1. Open the style inspector
2. Click on the button on the bottom left of the window
3. The **REVEAL FORMATTING** task pane opens.
4. Clicking on any of the blue **HYPERLINKS** opens the dialogs to edit any part of that style it is a very useful tool for editing your style.

► To close style inspector

Mouse

1. Click the cross on top right of dialog

Printing Styles

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

Document Themes

Apply A Document Theme

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

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

► To Apply a document theme

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

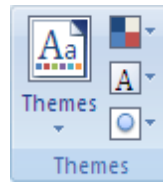
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Mouse

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

Or

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

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

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

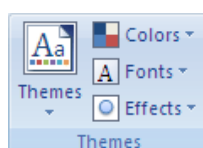
Customise A Document Theme

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

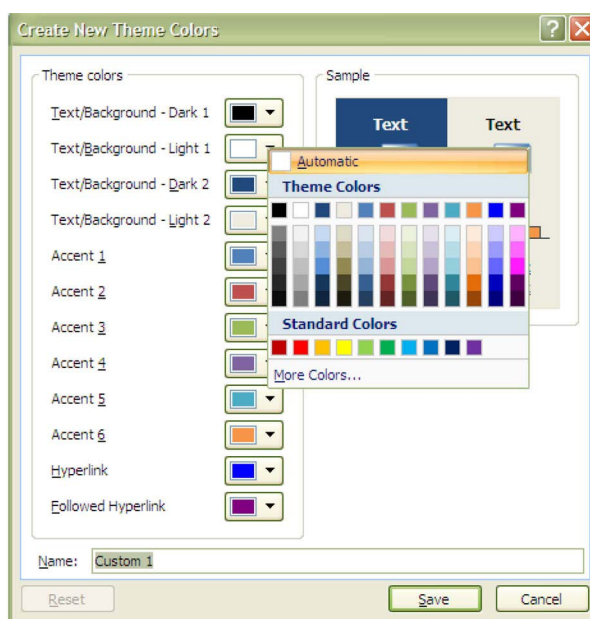
► To customise the theme colours



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



1. On the **PAGE LAYOUT** ribbon, in the **THEMES** group, click **COLOURS**.
2. Click **CREATE NEW THEME COLOURS** the following dialog is displayed



3. Under the **CREATE NEW THEME COLOURS** dialog, click the drop down button of the theme colour element that you want to change.

4. Select the colours that you want to use.

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

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

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

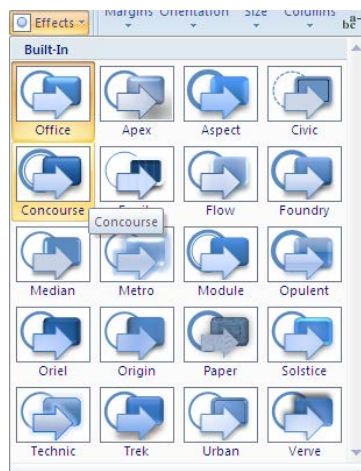
To customise the theme fonts

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

1. On the **PAGE LAYOUT** ribbon, in the **THEMES** group, click **THEME FONTS**.
2. Click **CREATE NEW THEME FONTS**.



3. In the **HEADING FONT** and **BODY FONT** boxes, select the fonts that you want to use.
4. *The sample is updated with the fonts that you select.*
5. In the **NAME** box, type an appropriate name for the new theme fonts.
6. Click **SAVE**.



► To select a set of theme effects



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

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

► To save a document theme

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

1. On the **PAGE LAYOUT** ribbon, in the **THEMES** group, click **THEMES**.
2. Click **SAVE CURRENT THEME**.
3. In the **FILE NAME** box, type an appropriate name for the theme
4. Click **SAVE**.

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

"I studied English for 16 years but...
...I finally learned to speak it in just six lessons"
Jane, Chinese architect

ENGLISH OUT THERE

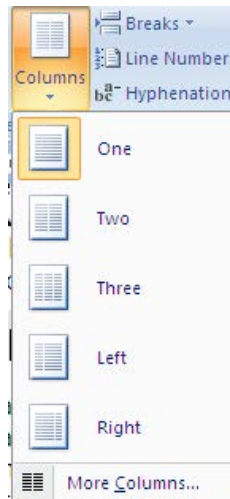
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Columns

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

Newspaper Columns



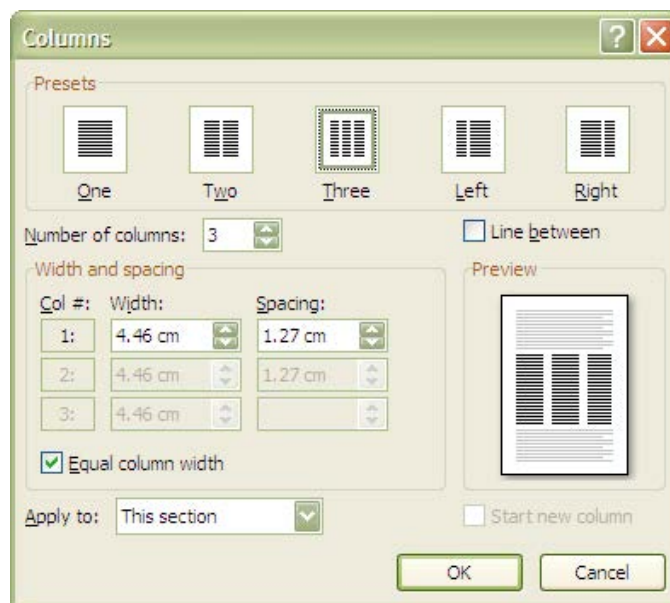
A columnar layout can either be tabular (where the information is divided both vertically and horizontally) or snaking columns, which have only a vertical division. The ‘snaking’ effect means that once column 1 is full, the text “snakes” on to the top of the next column, just like in a newspaper.

► To set up newspaper columns:

Mouse

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

OR



4. Click on **MORE COLUMNS** to display the **COLUMNS** dialog box.
5. Type in the number of columns required, e.g. 3, adjust the space between columns if necessary (the default is 0.5 inches).
6. You have the choice of having lines separating the columns. Lines will be the length of the longest column. Lines will only be printed if there are two or more columns.
7. Click on the box at **LINE BETWEEN**.
8. To see the line use **PRINT PREVIEW** or **PRINT LAYOUT** view.
9. If you wish to have columns of different widths ensure you untick the **EQUAL COLUMN WIDTH** checkbox
10. When all options are selected click ok to apply your columns

Entering Text

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

Copying, Moving And Deleting Text Between Columns

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

► To Move, copy and delete text between columns:

Mouse

1. Select the text to be copied and copy it with your preferred method.
2. Place the **INSERTION POINT** at the point where you wish to copy it to and press the Paste icon.
3. Select the text to be moved and cut it with your preferred method.

4. Place the **Insertion Point** at the point where you wish to copy it to and press the Paste icon.
5. Select the text to be deleted and press the **delete** key..

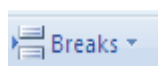
Column Breaks

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

► To insert a column break:

Mouse

1. Click on **BREAKS** from the **PAGE SETUP** group on the **PRINT LAYOUT** tab



2. Select **COLUMN BREAK** the break will be inserted. It can be deleted just like a page break or any other character with the **DELETE** key on the keyboard.

Or

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Keyboard

3. Press **CTRL SHIFT ENTER**.

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

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

Sections

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

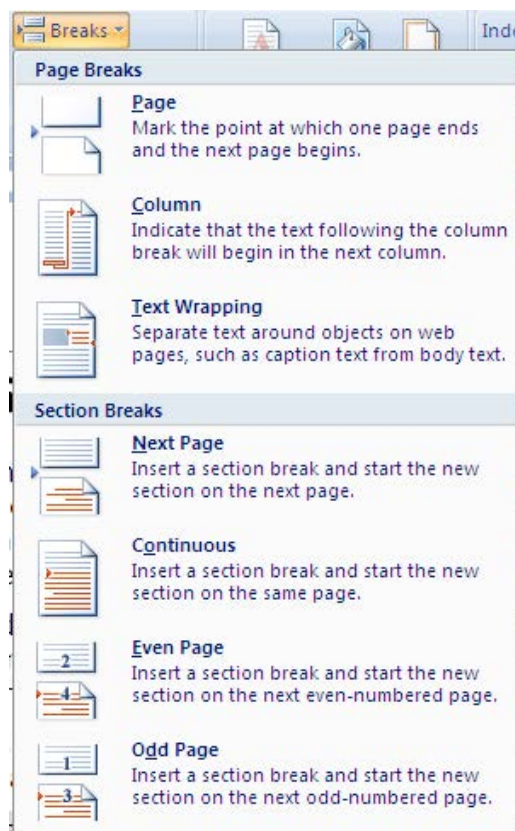
You may want different margin sizes in different parts of your document or page numbering restarting in different formats at different points. Columns use sections so that each section can be treated differently from the others.

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

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

Section Breaks

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



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

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

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

Continuous Section Breaks

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

Next Page Section Breaks

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

Odd Page And Even Page Section Breaks

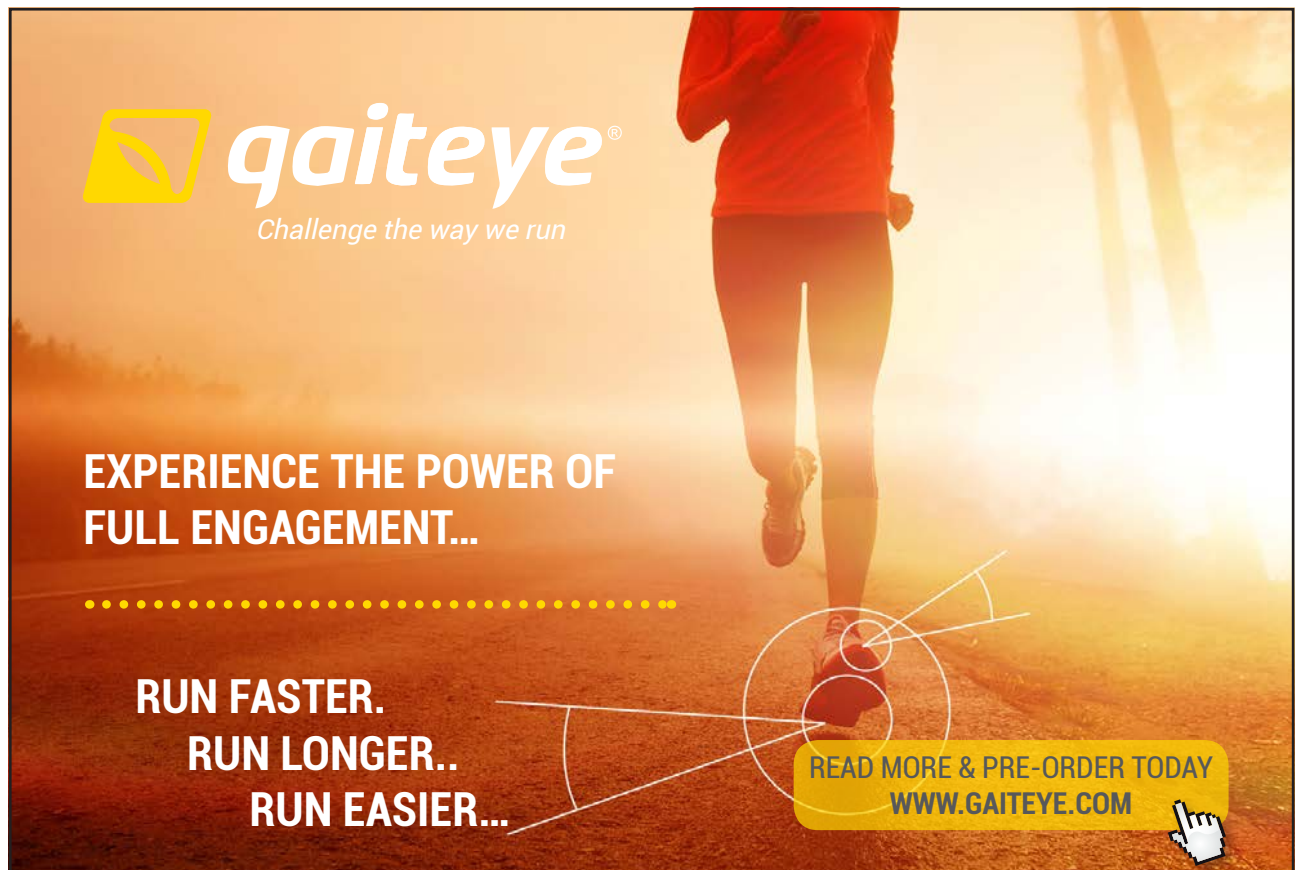
Useful when your document is set up with double-sided printing and mirror margins, these section breaks allow you to determine whether the next page should be odd (print on the right-hand side of the double-page) or even (print on the left-hand side of the double-page).

What Is Stored Within A Section?

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

Creating A Section Break

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



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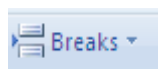
**RUN FASTER.
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The advertisement features a runner in a red shirt and black leggings running on a path. The background is a warm, golden-orange glow. Technical diagrams, including a dotted line and a circle with lines, are overlaid on the runner's feet. A yellow button with a hand cursor icon is located in the bottom right corner of the ad.

► To create a section break:

Mouse



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

Or

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

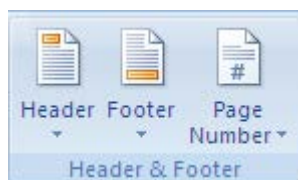
Or

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

The section break is displayed just before the new section:

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

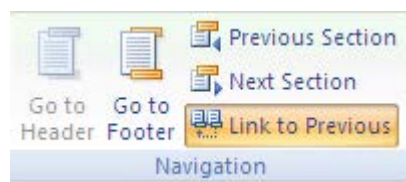
Handling Headers And Footers



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

- ▶ To unlink a header/footer from the previous section:

Mouse



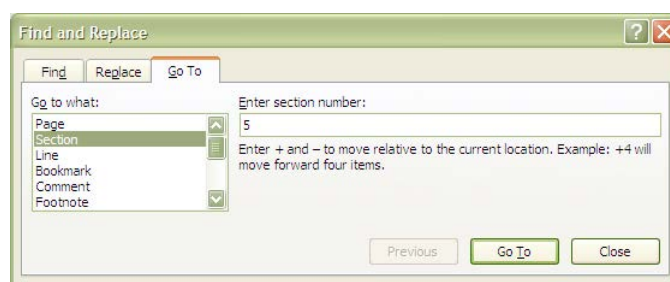
1. Position the insertion point in the **SECOND** section
2. Choose **HEADER** or **FOOTER** from the insert ribbon **HEADER & FOOTER** group and select **EDIT HEADER AND FOOTER** from the bottom of the displayed options
3. Click on the **LINK TO PREVIOUS BUTTON** to turn off the link to deselect the highlighted button
The link between any other two sections can be broken in the same way. However sometimes you may want to keep the link, particularly if you are working in a Master Document - see the section on Master Documents later in this manual.

Moving Between Sections

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

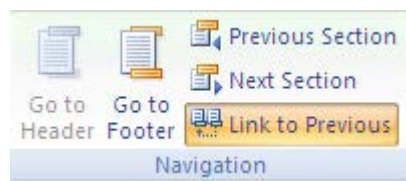
- ▶ To move to a specific section:

Keyboard



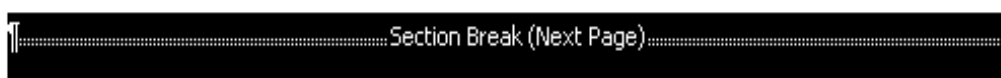
1. Press **F5** to open the goto dialog.
2. Click on **SECTION**, then type in the section number
3. Click on the **GO TO** button.

Or



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

Removing A Section Break



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

► To delete a section break:

Mouse

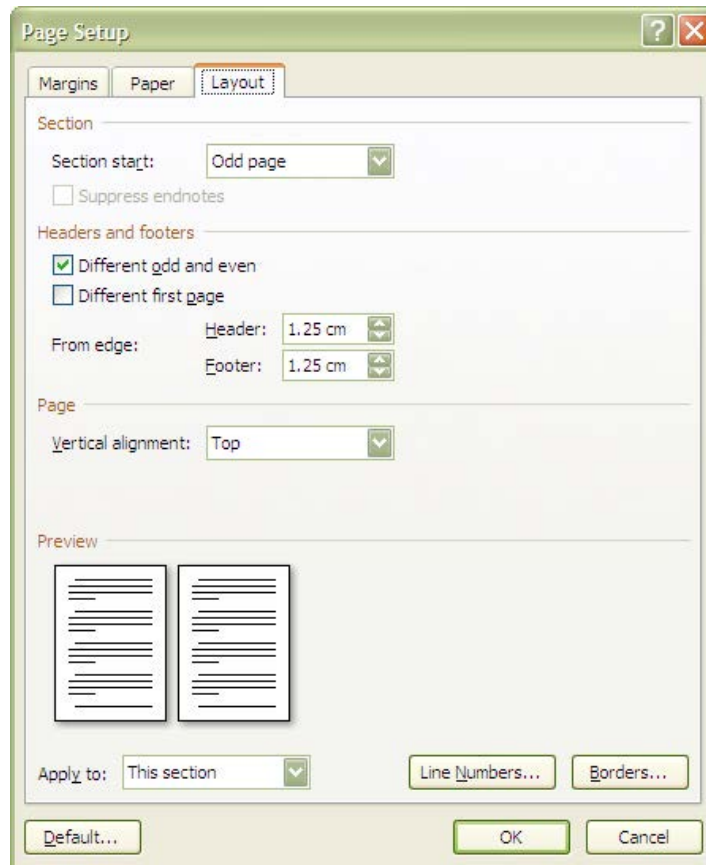
1. Select the section break to be removed
2. Press **DELETE**

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

Section Properties

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

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



► To Change the properties for a section:

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

Section 3 Outlining

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

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

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Document outlines

What Is A Document Outline?

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

When To Use Outlining

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

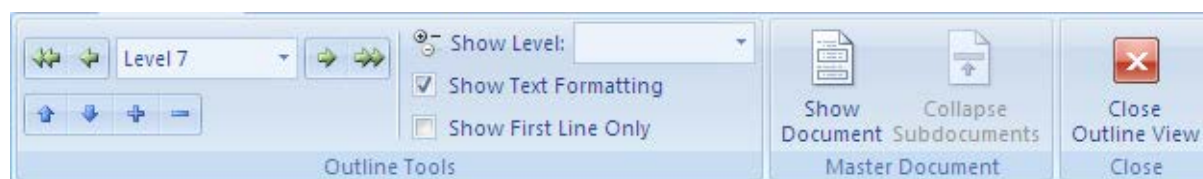
Word also provides standard styles for the levels of an outline, which can be redefined for ease and speed of formatting.

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

Outlining A Document

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




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



► To create an outline in a new document:

Mouse

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

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

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

Outlining An Existing Document

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

► To outline an existing document:

Mouse

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

Or

- Select a paragraph to change into an outline heading.



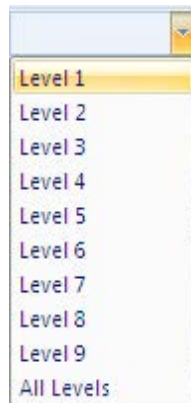
- Use the drop down box available between the **PROMOTE/DEMOTE** arrows to apply a specific level of heading to paragraph.

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

Using An Outline

► To show heading levels:

Mouse



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

An advertisement for the CMO Inspired Conference. The top section features the logo 'CMO INSPIRED CONFERENCE' in white and green, with the date '25 OCTOBER' and location 'DE VERE BEAUMONT ESTATE | OLD WINDSOR UK'. Below the logo is a photograph of a large, white, classical-style building with a fountain in the foreground. The bottom section shows a collage of images from the conference, including a woman speaking at a podium, a man presenting to an audience, and a group of people in a meeting. At the bottom of the advertisement, the text 'Join Over 100 Chief Marketing Officers & Digital Innovators' is written in green.

Showing Text

Text can be expanded or collapsed below a certain level.

► To expand or collapse text:

Mouse



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

Moving Headings And Body Text In An Outline

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

► To move headings:

Mouse

Drag the heading symbol, or body text symbol, at the left of the heading, or text, up or down to the new position or click the **Move Up** or **Move Down** buttons on the **outline** ribbon. Word moves all subtext with the heading.



Or

Keyboard

1. Position the insertion point in the heading.
2. To prepare the heading to be moved, collapse the heading (see above).
3. To move the heading above the preceding paragraph, press **ALT SHIFT ↑**.
4. To move the heading below the following paragraph, press **ALT SHIFT ↓**.

Outline Numbering

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

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

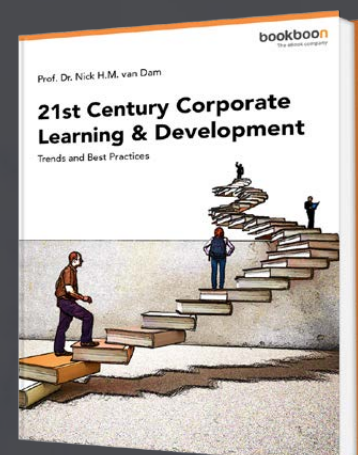
Applying A Multi-Level List

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

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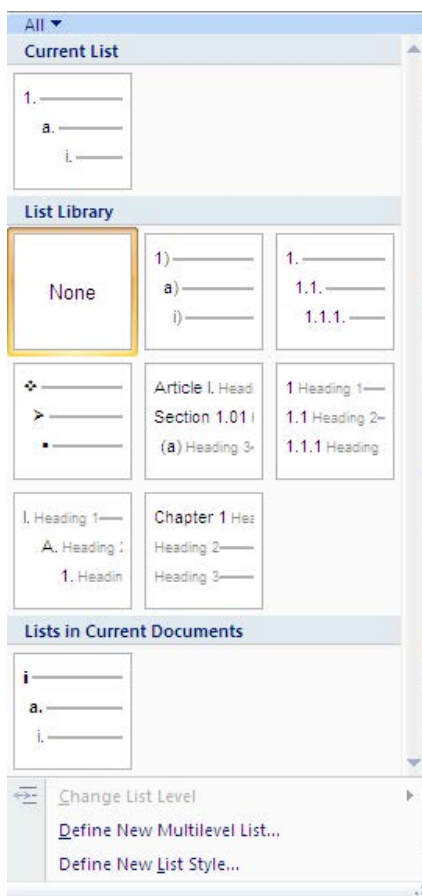
By the Chief Learning Officer of McKinsey


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► To apply a multi-level list:


Mouse




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

► To promote an item:

Mouse


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

Or


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

► To demote an item:

Mouse

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

Or

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

Heading numbering

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

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

To Define A New Multi Level List

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

Level

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

Number Style

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

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

Previous Level Number

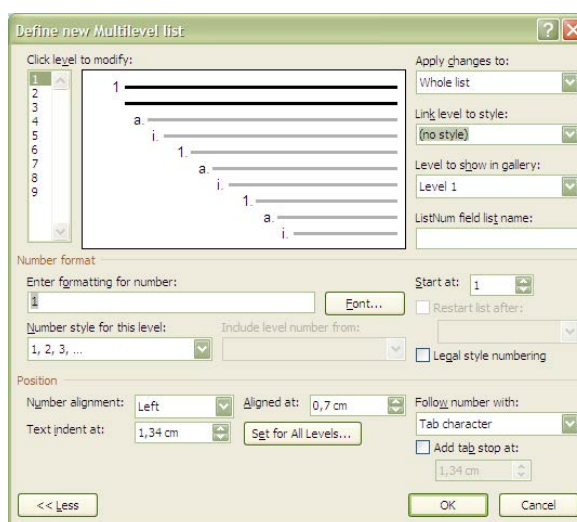
If you are creating a Legal or similar style, you can choose to make Levels 2-9 include the numbering of the previous level. E.G. if Level 1 style is 1, you can make Level 2 appear as 1.1. This option is not available for Level 1, as Level 1 has no previous level.


Number Position

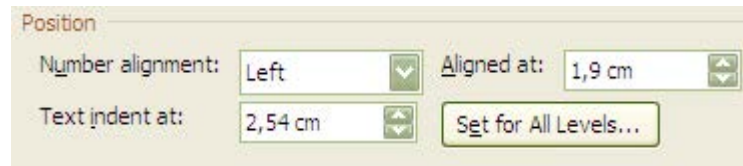
In this section, you can choose the alignment of the numbered text and where you want the numbers aligned. The Text position can be used to specify a precise measurement between the number and the text.

► To define new list

Mouse



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



Position

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



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Remove Heading Numbers

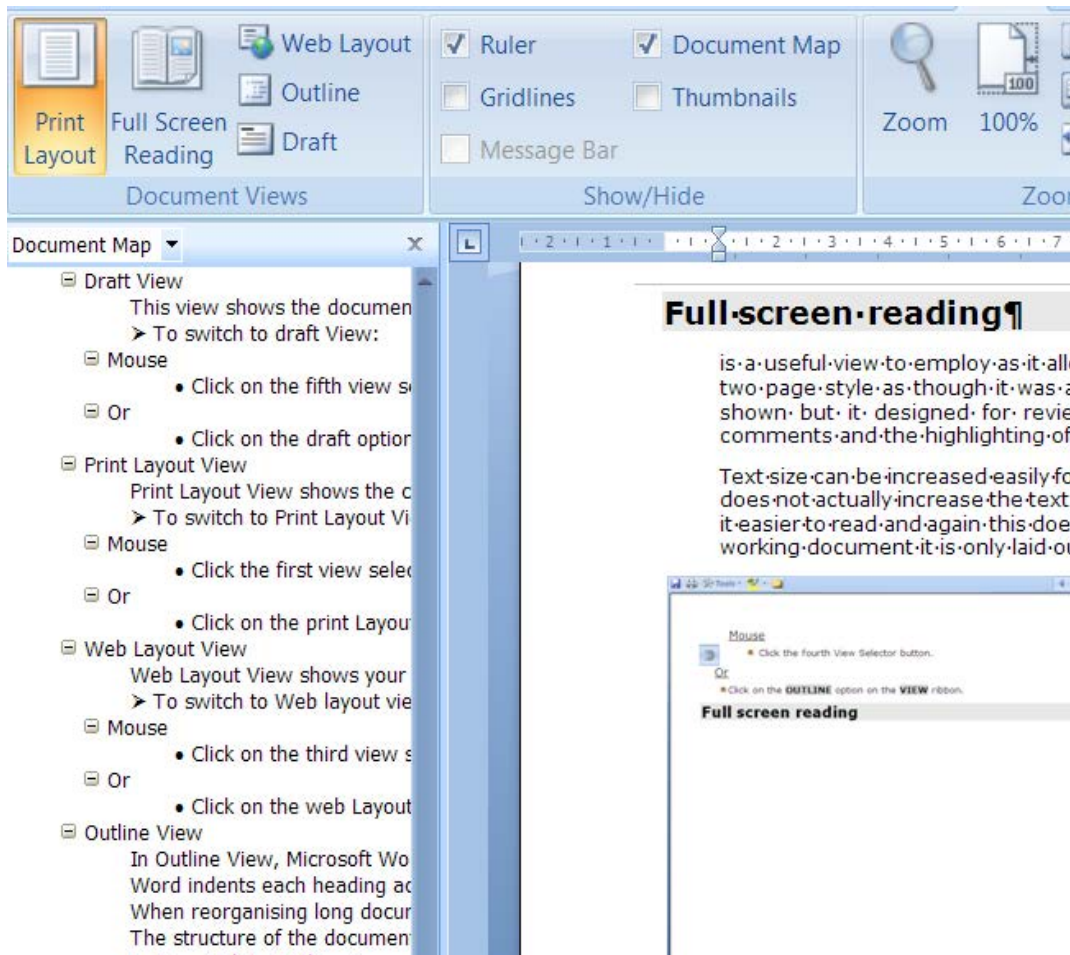
► To remove Heading Numbers from the whole document:

Mouse

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

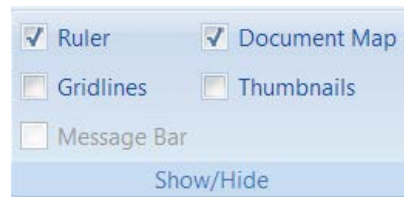
Document Map

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



► To switch to the Document Map:

Mouse



1. Click the check box for **Document Map** on the **View** ribbon in the **show/hide** group.

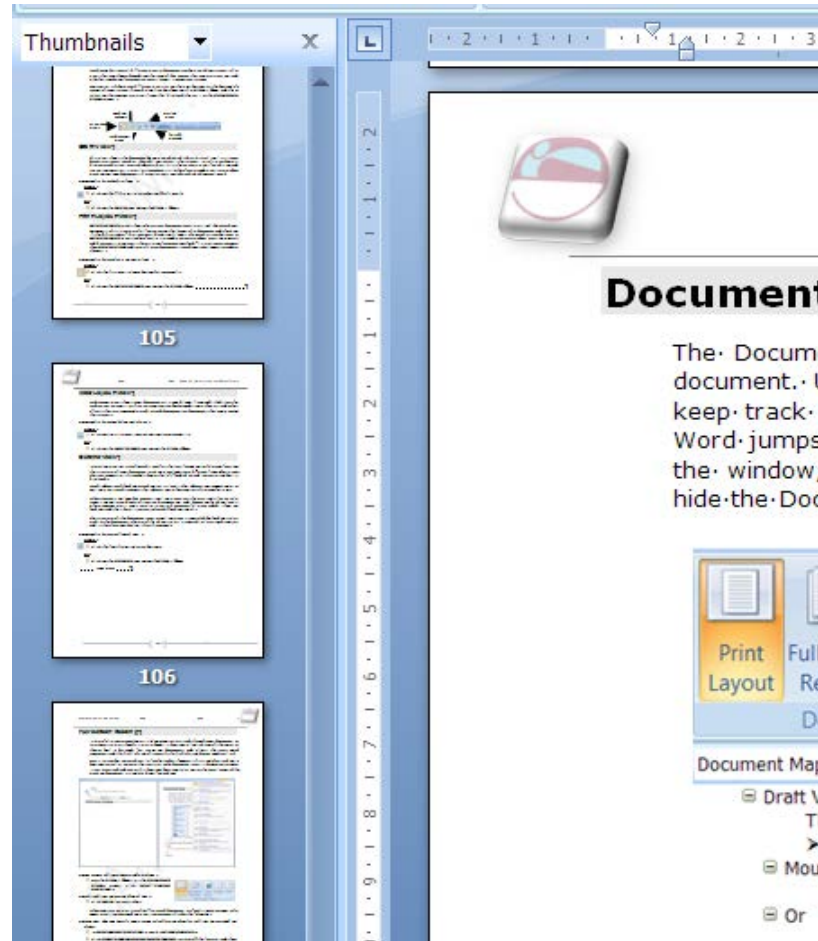
► To use document map

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

► To view thumbnails

1. To allow you to navigate in a different way, click on the drop down arrow to the right of where it says **DOCUMENT MAP** in the pane and select **THUMBNAILS**.
2. Navigate by page instead (see following picture)





Changing The Level Of Detail

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

► To hide/show document map levels:

Mouse

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

*To display only the headings below a specific level, right mouse in the **Document Map** and then choose a number on the shortcut menu. E.G. click **Show Heading 3** to display heading levels 1 through 3.*

► To adjust the size of the Document Map:

Mouse

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

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

► To close the Document Map:

Mouse

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

Section 4 Using master documents

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

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



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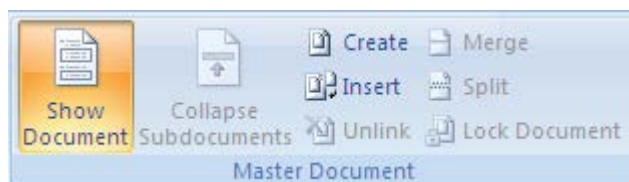
One generation's transformation is the next's status quo. In the near future, people may soon think it's strange that devices ever had to be "plugged in." To obtain that status, there needs to be "The Shift".

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Master documents

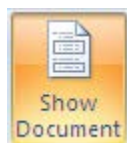
A master document helps you organise and maintain a long document by dividing it into several subdocuments. With a master document, you can work either with the entire long document or with any individual subdocument. You can create a table of contents and an index in the master document, which refers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



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

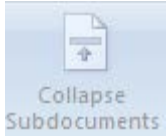
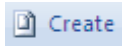
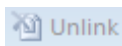
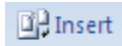
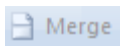
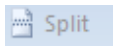

► To change to Master Document view:

Mouse



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

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

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

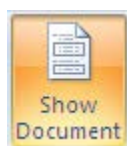
It is important to note that the total size of a master document and all of its subdocuments cannot exceed 32MB, excluding graphics. Also, a master document cannot contain more than 8 subdocuments.

2. Setting Up A Master Document

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

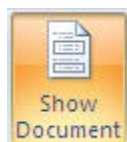
Creating A New Master Document

Use this procedure for creating a new master document from scratch

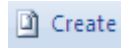


- To create a new master document:

Mouse



1. Open a **NEW** document and switch to **OUTLINE** view
2. Click on **SHOW DOCUMENT** for the document
3. Create subdocuments from the outline by clicking on the **CREATE** button.



4. Move within the main document to create other subdocuments.
5. Save the master document as you would with any other document. All of the subdocuments will be saved in the same location as the master with default names. (First letter of master and subdocument number)

Creating A Master Document Outline

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

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

Create the Subdocuments from the Outline

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

► To create subdocuments using the master document outline:

Mouse

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

Outline view



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

Draft view



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Saving The Master Document

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

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

Converting An Existing Document Into A Master Document

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

► To change a document into a master:

Mouse

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

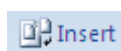
Inserting Subdocuments Into A Master Document

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

► To incorporate documents into a master:

Mouse

1. Open a new or existing document and switch to **OUTLINE** view, click on the **SHOW DOCUMENT** button.
2. Add some space at the start of the document (press **ENTER** a couple of times) if you wish to leave room for other items.
3. Position the insertion point where you want to insert the first document
4. Click on the **INSERT SUBDOCUMENT** button and select the file from the **INSERT** Subdocument dialog.



5. Repeat these last two steps for all the subdocuments. When you save the Master Document, all the subdocuments retain their original filenames and locations

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

Opening a Subdocument

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

► To use the master to open a Subdocument:

Mouse

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

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

Renaming a Subdocument

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

► To rename a subdocument:

Mouse

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

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

Splitting a Subdocument

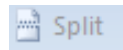
You can split a subdocument if it becomes too large, this would also allow multiple authors to work on parts of the subdocument.

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

► To split a subdocument in two:

Mouse

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

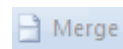


Merging Subdocuments

► To merge two subdocuments into one:

Mouse

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

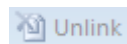


Removing a Subdocument

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

Mouse

1. Switch to **OUTLINE** view
2. Click on the subdocument icon belonging to the subdocument you want to convert
3. Click on the **UNLINK** Subdocument button.



► To completely remove a subdocument from the master document:

Mouse

1. Open master document and switch to **OUTLINE** view, click on the **SHOW DOCUMENT** button.
2. Click on the subdocument icon belonging to the subdocument you want to remove
3. Press **DELETE**

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

Sharing a Master Document

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

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

The advertisement features a central graphic of three stylized human figures surrounded by gears, all enclosed within a circular arrow indicating a cycle. To the right, the text 'UNLEASHING CHANGE MANAGEMENT' is written in large, bold, blue capital letters. Below this, the dates 'OCTOBER 18 & 19, 2018' and the location 'DE RODE HOED AMSTERDAM' are displayed in smaller blue text. The bottom of the ad shows a silhouette of an Amsterdam skyline with a windmill and a bridge. In the bottom left corner, the text 'Global Executive Events' is visible.

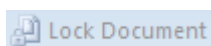
Unlocking a Subdocument

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

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

Mouse

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



Multi-User Access

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

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

► To allow others access to the master document:

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

Mouse

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

Formatting A Master Document

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

Styles

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

Headers And Footers

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

Tables Of Contents And Indexes

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

Cross-References

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

Printing The Master Document

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

Printing A Subdocument

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

Section 5 Templates and forms

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

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

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Templates

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

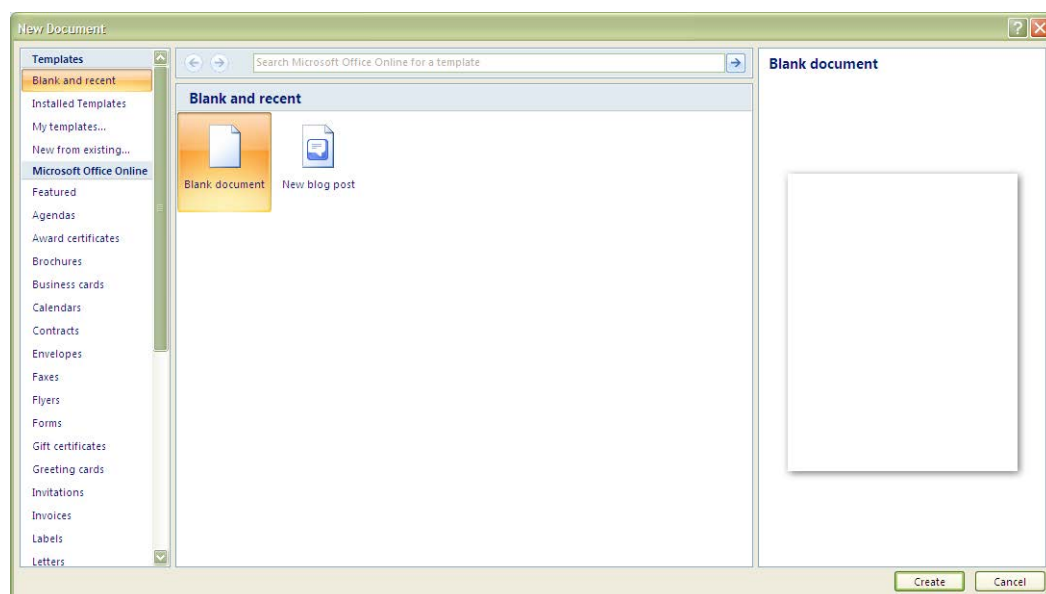
Create a Template

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

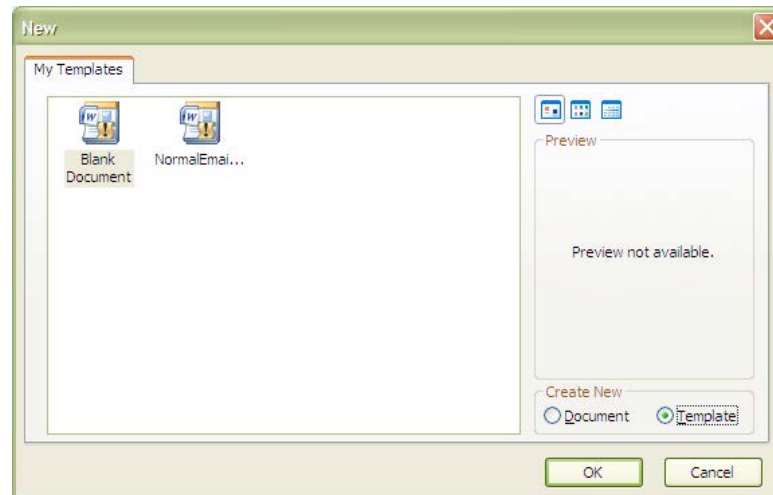
► To create a new template:

Mouse

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



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



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

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

Setting Template Appearance

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

Paper size

Page orientation

Margins

Headers and footers

► To set template appearance:

Mouse

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

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

See the section on Styles for more information.

Enhancing a Template

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

► To enter boilerplate text and graphics:

Mouse

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

Template From Existing Document

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

Customising The Template Environment

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

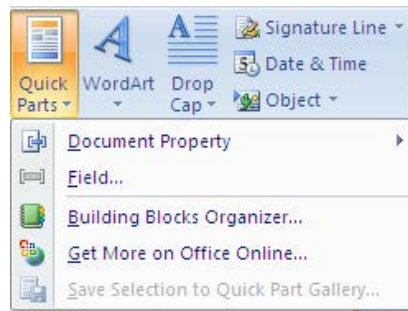
Fields

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

Inserting Fields

- ▶ To insert a field into a document:

Mouse



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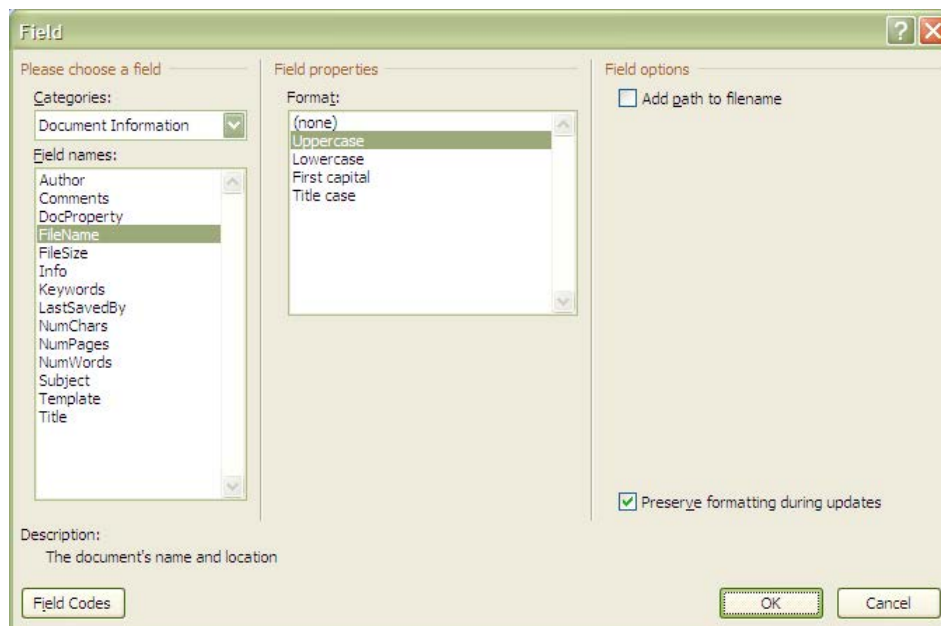
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1. Position the insertion point where you want to add the field
2. Choose **QUICK PARTS** from the **INSERT** ribbon in the **TEXT** group. A dialog opens.



3. The **FIELD** dialog displays a list of **CATEGORIES:**, and when you click on one of these, the **FIELD NAMES:** in that category are displayed below. At this point you can select the required field (the description tells you what the field will display) then click on **OK**.

Field Switches (field properties)

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

► To add a switch:

Mouse

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

Inserting The Styleref Field

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

► To insert the StyleRef field:

Mouse

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

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

```
{STYLEREF "Heading 1"}
```

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

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

Updating Fields

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

► To update a field:

Mouse

1. Right click on a field and choose **UPDATE FIELD**.

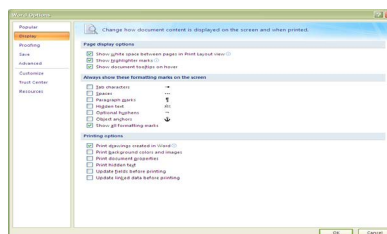
Keyboard

1. Click in or select the field and Press **F9**

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

► To set automatic field updating when printing:

Mouse



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

Viewing Field Codes

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

C:\MY DOCUMENTS\WORD2002 ADVANCED MANUAL.DOC

You may need to see the underlying code.



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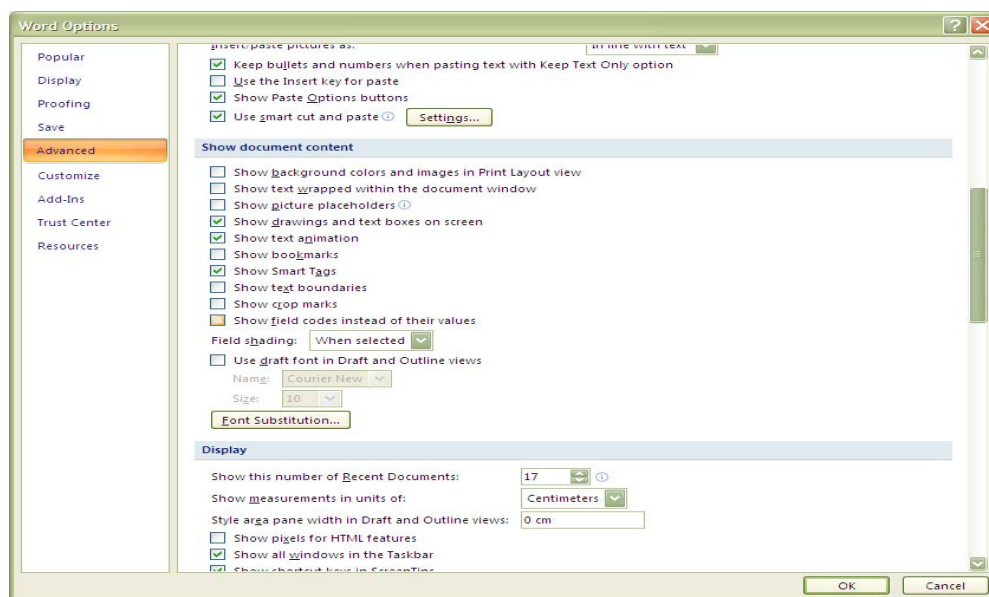


Display All Field Codes

► To display all the field codes in the document:

Keyboard

1. Press **ALT F9** OR Click the **OFFICE BUTTON** and select **WORD OPTIONS**. Click on the **ADVANCED** tab and scroll on the right to **SHOW DOCUMENT CONTENT**. Click on the **SHOW FIELD CODES INSTEAD OF THEIR VALUES** check-box.
2. You also have the option how those field codes are displayed just underneath that option you may select from the drop down box whether to show the fields shaded or not so as to easily identify them.
Whatever choices you make these are selections for the screen only the fields will print the actual vales as described. Print preview will show exactly how the data will appear. To toggle back to display all field results, repeat the procedure above.



Display A Single Field Code

► To display the underlying field code:

Mouse



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

Or

Keyboard

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

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

{FILENAME \p * MERGEFORMAT}

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

Locking

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

► To lock/unlock a field:

Keyboard

1. Click in or select the field. Press **CTRL F11**.
2. Click in or select the field Press **CTRL SHIFT F11**

Unlinking Fields

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

► To unlink a field:

Keyboard


1. Click in or select the field
2. Press **CTRL SHIFT F9**

Deleting Fields

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

Common Long Document Fields

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



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Date And Time

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

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

Document Information

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

Numbering

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

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

Using Fields In a Template

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

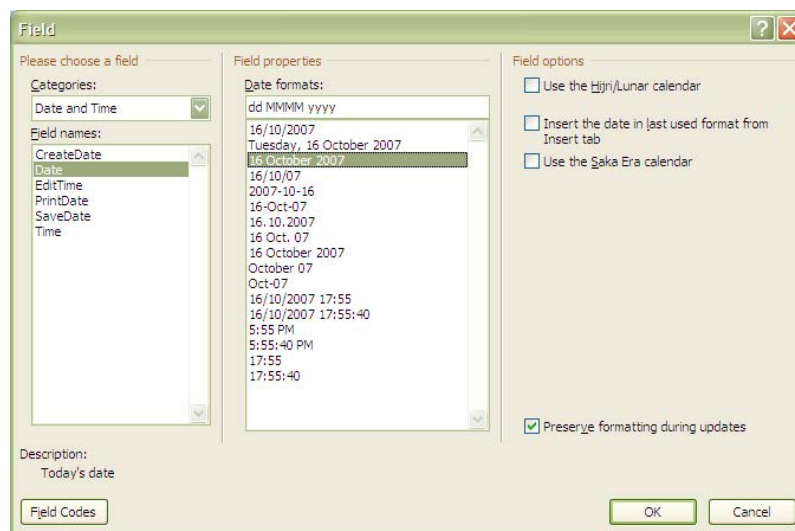
When you insert the date or time, you can check Update Automatically. When this is checked, Word will automatically update the field to the current date or time when the document is printed. If you want the current date to be inserted in the document and to remain as that date, do not check Update Automatically.

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

► To insert a date field in a template:

Mouse

1. **OPEN** the template file
2. Position the insertion point where you want the date to appear.
3. Go to the **QUICKPARTS** button on the **INSERT** ribbon and select **FIELD**.
4. Insert the **DATE** field from the **FIELD** dialog
5. Choose the format you would like for your date by clicking on the appropriate date in the list of field properties .



6. Click **OK**. The date will appear in the template.

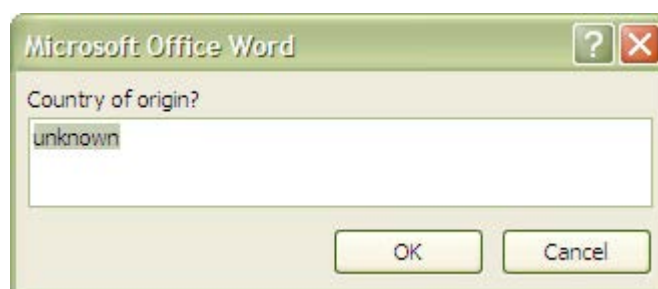
The Fillin Field

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

► To insert fields to provide user prompts:

Mouse

1. Open the template file.
2. Position the cursor where you want the variable information.
3. Go to the **QUICKPARTS** button on the **INSERT** ribbon and select **FIELD**. The field dialog box will appear.
4. In the **CATEGORIES** list choose **MAIL MERGE**.
5. In the **FIELD NAMES** list choose **FILL-IN**. Click in the **FIELD PROPERTIES** text box and type your prompt, such as Please enter the memo subject.
6. If you expect many entries the same such as “country of origin” “UK” then enter a default response in the **FIELD OPTIONS** text box for a default response.



7. Click **OK**. The following dialog box will flash up on the screen.
8. This is a preview of how your prompt boxes will appear to those people using your template.
9. Click the **CANCEL** button to clear the dialog.
10. Repeat the process until you have created dialogs to cover all the variable information you need to prompt for.
11. Save the template file.

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

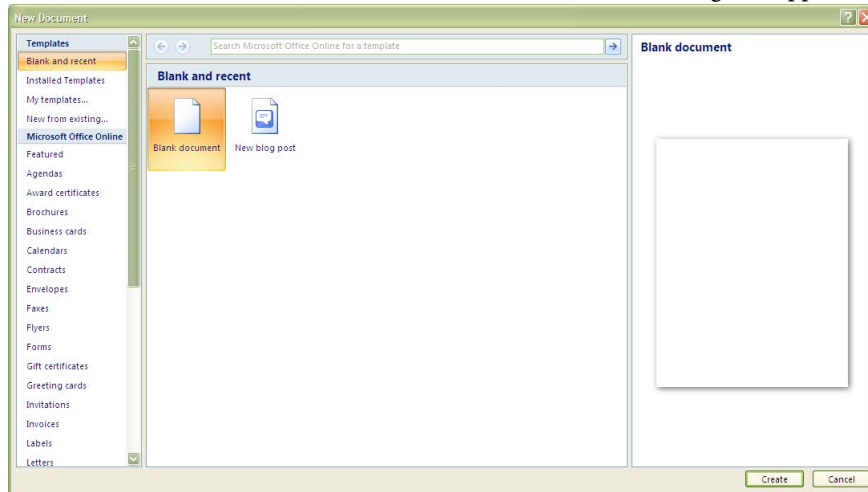
Using A Template With Fillin Fields

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

► To create a new document based on the template:

Mouse

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



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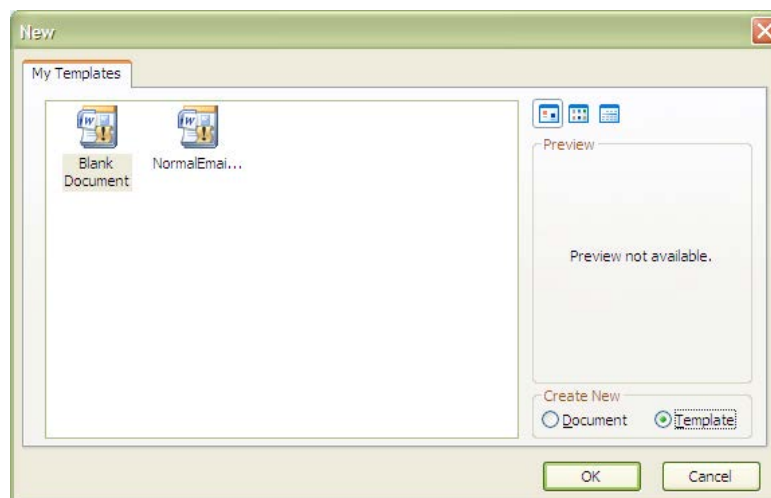
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- Choose the **MY TEMPLATE** option on the left a further dialog will appear Ensure that the **BLANK DOCUMENT** icon is highlighted in the main window and select template from the **CREATE NEW** at the bottom right then click **OK**.



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

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

► To alter field shading options:

Mouse

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

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

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

***WHEN SELECTED** is the default*

Form fields

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

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


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

Create a Form

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


► To Set up Word for creating forms

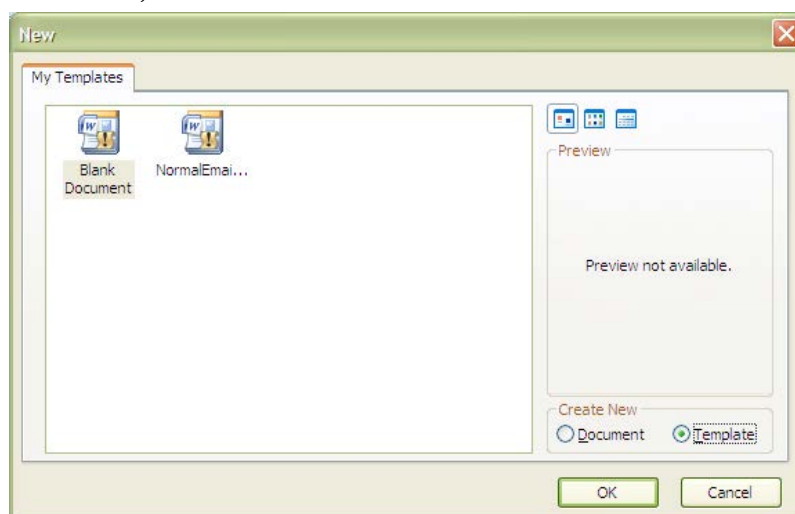
Mouse



1.  Click the **OFFICE BUTTON**, and then click **WORD OPTIONS**.
2. Click **POPULAR**.
3. Select the **SHOW DEVELOPER TAB IN THE RIBBON** check box, and then click **OK**.

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

Mouse

1.  Click the **OFFICE BUTTON**, and then click **NEW**.
2. Under **TEMPLATES**, click **MY TEMPLATES**.
3. Double-click **NORMAL**, and then select **TEMPLATE** or **DOCUMENT** under **CREATE NEW**.



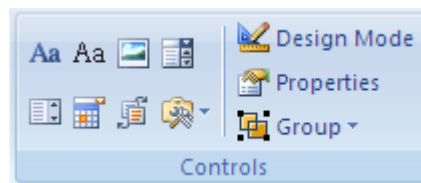
4.  Click **OK**.
5.  Click the **OFFICE BUTTON**, and then click **SAVE AS**.
6. In the **SAVE AS** dialog box, give the new template or document a file name, and then click **SAVE**.

Controls

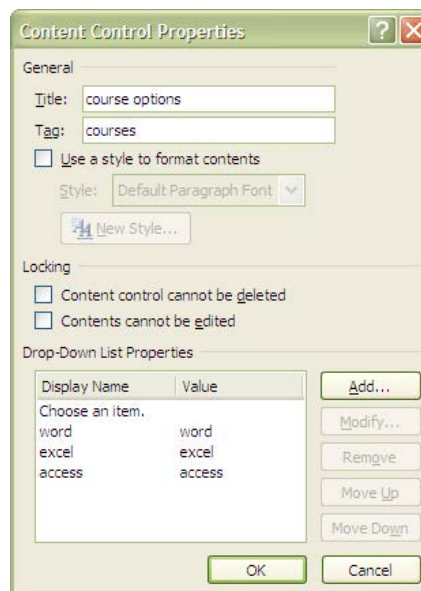
Content control	Definition	Example	Restrictions
Rich Text	Formatting can be saved by loading, saving, or closing the document.	Use for a short paragraph such as an abstract, a summary, or a legal disclaimer.	No restrictions.
Text	Limited to content that cannot contain any formatting, only plain text.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

► To Add content controls to the form

Mouse and keyboard




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

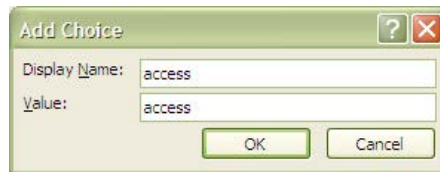


Insert a text control where users can enter text

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

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

1.  On the **DEVELOPER** ribbon, in the **CONTROLS** group, click the **DROP-DOWN LIST** control.
2. Select the content control, and then on the **DEVELOPER** ribbon, in the **CONTROLS** group, click **PROPERTIES**.
3. To create a list of choices, under **DROP-DOWN LIST PROPERTIES**, click **ADD**.




4. Type a choice in the **DISPLAY NAME** box, such as **YES**, **NO**, or **MAYBE**.
5. Repeat this step until all of the choices are in the drop-down list then click **OK**.

► To set or change properties for content controls

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




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

► To add instructional text to the form

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

Mouse

1. On the **Developer** ribbon, in the **Controls** group, click **Design Mode**.
2. Click the content control where you want to revise the placeholder instructional text.
3. Edit the placeholder text and format it any way you want.
4. If you want the content control to disappear when someone types in their own content to replace your instructions in a **RICH TEXT** control or a **TEXT** control, click **PROPERTIES** in the **CONTROLS** group, and then select the **REMOVE CONTENT CONTROL WHEN CONTENTS ARE EDITED** check box.
5. On the **DEVELOPER** ribbon, in the **CONTROLS** group, click **DESIGN MODE** to turn off the design feature and save the instructional text.

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

Add Protection To The Form

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

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

► To Protect fields in a form

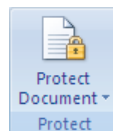
1. Open the form that you want to protect.
2. Select the content control or the group of controls to which you want to restrict changes.
3. To group several controls, select the controls by pressing **SHIFT** and clicking each control that you want to group. On the **DEVELOPER** ribbon, in the **CONTROLS**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

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

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

This option is not available for all controls.

- To Protect all of the contents of a form
Mouse



Restrict Formatting and Editi ▾ ×

1. Formatting restrictions

Limit formatting to a selection of styles

Settings...

2. Editing restrictions

Allow only this type of editing in the document:

No changes (Read only) ▾

Tracked changes

Comments

Filling in forms

No changes (Read only)

choose users who are freely edit them.

Groups:

Everyone

More users...

3. Start enforcement

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

Yes, Start Enforcing Protection

See also

[Restrict permission...](#)

1. Open the form that you want to help protect.
2. On the **DEVELOPER** ribbon, in the **PROTECT** group, click **PROTECT DOCUMENT**, and then click **RESTRICT FORMATTING AND EDITING**.

3. In the **PROTECT DOCUMENT** task pane, under **EDITING RESTRICTIONS**, select the **ALLOW ONLY THIS TYPE OF EDITING IN THE DOCUMENT** check box.
4. In the list of editing restrictions, select **FILLING IN FORMS**.
5. Under **START ENFORCEMENT**, click **YES, START ENFORCING PROTECTION**.
6. To assign a password to the document so that only reviewers who know the password can remove the protection, type a password in the **ENTER NEW PASSWORD (OPTIONAL)** box, and then confirm the password.

► To Protect a Section Of The form

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

Mouse

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

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

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

It is critical that you remember your password. If you forget your password, Microsoft cannot retrieve it. Store the passwords that you write down in a secure place away from the information that they help protect.

To see Section 6-12 download
Word 2007 Advanced: Part II