LEARNER'S GUIDE



Microsoft 365 Word: Part 3

Microsoft 365 Training

Microsoft[®] 365 Word[®]: Part 3

Courseware Release Version 4.0

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ABOUT THIS COURSE

Course Prerequisites

This manual assumes that the user has completed the first two levels of our Microsoft 365 Word courseware, or has equivalent knowledge of the following topics:

- Using the various parts of the Microsoft Word interface
- Getting help in Microsoft Word
- Creating, opening, and saving a basic document
- Applying formatting to text
- Controlling text flow using the tools on the Home tab, Layout tab, and Page Setup dialog
- Customizing document format using styles and themes
- Using templates
- Inserting and modifying tables, charts, text boxes, shapes, images, videos, and SmartArt
- Proofing a document for errors
- Customizing the Microsoft Word environment
- Performing a mail merge
- Using macros

Course Overview

Welcome to the third part of our Microsoft 365 Word courseware. This advanced course is designed to help users collaborate on documents and secure information. This course also covers techniques for creating complex documents, such as forms or documents that require reference pages.

This course uses the desktop version of Microsoft 365 Word, not the online version.

Course Objectives

By the end of this course, students should be comfortable with using Microsoft Word's tools to facilitate collaboration and document versioning. Students will also learn how to create reference pages and manage long documents. As well, students will learn how to create forms using Microsoft Word.

How to Use This Book

This course is divided into six lessons. Each lesson focuses on several key topics, each of which are broken down into easy-to-follow concepts. At the end of each topic, you will be given an activity to complete. At the end of each lesson, we will summarize what has been covered and provide a few review questions for you to answer. Supplemental learning for selected topics is provided in the form of Lesson Labs at the end of this book.

Before you begin, download the course's Exercise Files to a convenient location, such as the desktop. They will be referenced throughout this course and are a key part of your learning experience.

LESSON 1: COLLABORATING ON DOCUMENTS

Lesson Objectives

In this lesson you will learn how to:

- Modify user information in a document
- Share a document
- Work with comments
- Compare document changes
- Review a document with tracked changes
- Merge document changes
- Coauthor documents

TOPIC A: Modify User Information

Whenever you create or modify a Microsoft Word document, information about yourself, your computer, and your actions are recorded in the document's properties. In this topic, you will learn how to view and modify this information.

Topic Objectives

In this topic, you will learn:

- How to view file properties
- How to modify your user information

Viewing File Properties

In Microsoft 365 Word, you can view, add, or edit the properties of a document only in the desktop version. These properties can include who authored the document, date information, and more. Referred to as **metadata**, this information can be very useful when collaborating with other users.

To view the properties of an open document, click File \rightarrow Info \rightarrow Properties \rightarrow Advanced Properties:



Notice how some properties are already displayed in Backstage view. To edit, you can click some of these fields, such as Title and Author.

The Properties dialog box will open for the selected File:

Annual Rep	ort Prop	erties			?	×
General S	Gummary	Statistics	Contents	Custom		
Title:	Annu	al Report				
Subject:						
Author:	John	Smith				
Manager:						
Company						
Category						
Keywords	:					
Comments	s:					
Hyperlink base:						
Template:	Activit	ty 4-1				
Save T	humbnails	s for All Wo	rd Documen	ts		
				ок 🔓	Can	cel

Enter the desired information and click **OK** to save your changes.

User Information

•

A key part of file properties and document collaboration is your username and initials. To ensure that these are correct, click **File** \rightarrow **Options**:

This will open the General category of the Word Options dialog box. Here you will see fields for your username and your initials:

Word Options		?	×
General Display	General options for working with Word.		
Proofing	User Interface options		
Proofing Save Language Ease of Access Advanced Customize Ribbon Quick Access Toolbar Add-ins Trust Center	User Interface options When using multiple displays: ① • Optimize for best appearance • Optimize for compatibility (application restart required) Show Mini Toolbar on selection ① Enable Live Preview ① Update document content while dragging ① Collapse the ribbon automatically ① Collapse the Microsoft Search box by default ③ Screen Tip style: Show feature descriptions in Screen Tips Personalize your copy of Microsoft Office User name: John Smith Initials: Igl Office Background: No Background ▼ Office Ineme: Colorful ▼ Privacy Settings LinkedIn Features Use LinkedIn features in Office to stay connected with your professional network and keep up to date in your i	ndustry	
	About Linkedla Fasture Manage Linkedla account account interesting	Can	cel

Inside these fields, enter the correct information in the appropriate fields. Click **OK** to apply any changes and close the dialog box.

Activity 1-1: Modifying User Information

In this activity, you will open a document and modify its properties.

1. Open Microsoft 365 Word and open Activity 1-1.



- 2. First, let us check your user information. Click **File → Options**:
- **3.** The General category should be open. Click in the "User name" field and type your name:

several	vord Options	? X
Display User Interface options vivo	General	General options for working with Word.
Proofing User Interface options iave When using multiple displays:() ianguage © Optimize for best appearance iase of Access Optimize for sompatibility (application restart required) iase of Access Show Mini Toolbar on selection () Advanced Image: Show Mini Toolbar on selection () Customize Ribbon Update document content while gragging () Collapse the ribbon automatically () Collapse the ribbon automatically () Collapse the ribbon automatically () Collapse the Microsoft Search box by default () Screen Tip style: Show feature descriptions in ScreenTips * Personalize your copy of Microsoft Office User name: User name: John Smith Initials:	Display	
Save When using multiple displays:0 anguage • Optimize for best appearance • Optimize for compatibility (application restart required) Show Mini Toolbar on selection 0 Show Mini Toolbar on selection 0 Clabare Ribbon Duck Access Toolbar Oldipase the nibbon automatically 0 Collapse the Microsoft Search box by default 0 ScreenTip style: Show feature descriptions in ScreenTips Add-ins Irrust Center Personalize your copy of Microsoft Office User name: John Smith Jnitials: _ Always use these values regardless of sign in to Office. Office Background: No Background * Office Inheme: Colorful * Privacy Settings EinkedIn features in Office to stay connected with your professional network and keep up to date in your industry. Ø Enable LinkedIn features in my Office applications 0 Auser LinkedIn features in my Office applications 0 Auser LinkedIn features in Merce LinkedIn features in the point office Description (Construction) Auser LinkedIn features (Construction) Ausere LinkedIn features (Construction) Auser LinkedIn feature	Proofing	User Interface options
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 Optimize for compatibility (application restart required) iase of Access Advanced Show Mini Toolbar on selection ① Enable Live Preview ① Update document content while gragging ① Update document content while gragging ① Collapse the ribbon automatically ② Collapse the Microsoft Search box by default ③ Screen Tip style: Show feature descriptions in Screen Tips ▼ Personalize your copy of Microsoft Office User name: John Smith Initials: Always use these values regardless of sign in to Office. Office Background: No Background ▼ Office Theme: Colorful ▼ Privacy Settings. Privacy Settings LinkedIn Features in Office to stay connected with your professional network and keep up to date in your industry. Enable LinkedIn features in my Office applications ③ 	Language	Optimize for best appearance
Advanced Show Mini Toolbar on selection ① Advanced Enable Live Preview ① Customize Ribbon Update document content while gragging ① Quick Access Toolbar Collapse the ribbon automatically ① Add-ins Collapse the Microsoft Search box by default ① Screen Tip style: Show feature descriptions in Screen Tips ▼ Personalize your copy of Microsoft Office User name: User name: John Smith Initials:	Ease of Access	 Optimize for <u>compatibility</u> (application restart required)
Advanced Image: Enable Live Preview Image: Enable Live P	Lase of Access	✓ Show Mini Toolbar on selection ^①
Customize Ribbon ☑ Update document content while gragging ① Quick Access Toolbar ☑ Collapse the ribbon automatically ① Add-ins □ Collapse the Microsoft Search box by default ③ Screen Tip style: Show feature descriptions in Screen Tips ▼ Personalize your copy of Microsoft Office ☑ ser name: ☑ Linkadin Features John Smith Initials: □ Always use these values regardless of sign in to Office. Office Background: No Background ▼ Office I heme: Colorful ▼ Privacy Settings Use LinkedIn Features in Office to stay connected with your professional network and keep up to date in your industry. ☑ Enable LinkedIn features in my Office applications ① Abact LinkedIn features in my Office applications ①	Advanced	✓ Enable Live Preview ^①
Quick Access Toolbar Collapse the ribbon automatically (*) Add-ins Collapse the Microsoft Search box by default (*) Screen Tip style: Show feature descriptions in Screen Tips * Personalize your copy of Microsoft Office * User name: John Smith Initials:	Customize Ribbon	✓ Update document content while dragging ^①
Add-ins Collapse the Microsoft Search box by default ③ Screen Tip style: Show feature descriptions in Screen Tips ▼ Personalize your copy of Microsoft Office	Quick Access Toolbar	Collapse the ribbon automatically ①
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User name: John Smith Initials:	Trust Center	Personalize your copy of Microsoft Office
User name: John Smith Initials:		
Initials:		User name: John Smith
Always use these values regardless of sign in to Office. Office Background: No Background ▼ Office Theme: Colorful ▼ Privacy Settings Privacy Settings LinkedIn Features Use LinkedIn features in Office to stay connected with your professional network and keep up to date in your industry. ✓ Enable LinkedIn features in my Office applications ③ About linkedIn Features		Initials:
Office Background: No Background: Image: Colorful		Always use these values regardless of sign in to Office.
Office <u>Theme</u> : <u>Colorful</u> ▼ Privacy Settings Privacy Settings LinkedIn Features Use LinkedIn features in Office to stay connected with your professional network and keep up to date in your industry. ☑ Enable LinkedIn features in my Office applications ①		Office Background
Privacy Settings Privacy Settings LinkedIn Features Use LinkedIn features in Office to stay connected with your professional network and keep up to date in your industry. ✓ Enable LinkedIn features in my Office applications ① About LinkedIn Features		Office <u>Theme</u> : Colorful •
Privacy Settings LinkedIn Features Use LinkedIn features in Office to stay connected with your professional network and keep up to date in your industry. ✓ Enable LinkedIn features in my Office applications ① About LinkedIn Features		Privacy Settings
LinkedIn Features Use LinkedIn features in Office to stay connected with your professional network and keep up to date in your industry. Enable LinkedIn features in my Office applications () About LinkedIn Features Control Control		Privacy Settings
Use LinkedIn features in Office to stay connected with your professional network and keep up to date in your industry. Enable LinkedIn features in my Office applications ① About industry		LinkedIn Features
Enable LinkedIn features in my Office applications ()		Use LinkedIn features in Office to stay connected with your professional network and keep up to date in your industry.
About Lieberdle Fortune Manage Lieberdle account accounting		Enable LinkedIn features in my Office applications ①
		About Linkedla Fasture Manager Linkedla engenistication

4. Enter your initials in uppercase in the next field:

General General options for working with Word. Display User Interface options Proofing User Interface options Save When using multiple displays:① Language Optimize for best appearance Display in the formation of the formatio of the formation of the formation of the formation of th	
Display LERX Proofing User Interface options Save When using multiple displays: ① Language Optimize for best appearance 	4
Proofing User Interface options Save When using multiple displays: ① Language Image: Image Optimize for best appearance	
Save When using multiple displays:0 Language Optimize for best <u>appearance</u>	
Ease of Access O Uptimize for gompatibility (application restart required) Advanced Show Mini Toolbar on selection © Customize Ribbon Update document content while gragging © Quick Access Toolbar Collapse the Microsoft Search box by default © Add-ins Collapse the Microsoft Search box by default © Trust Center Personalize your copy of Microsoft Office User name: John Smith Initials: IS Always use these values regardless of sign in to Office.	
Office Background ▼ Office Theme: Colorful ▼ Privacy Settings Privacy Settings LinkedIn Features Use LinkedIn features in Office to stay connected with your professional network and keep up to date in your indust ☑ Enable LinkedIn features in my Office applications ① About LinkedIn Features	y.

5. Click **OK** to save your changes:

Word Options		?	\times
General Display	$\mathbb{R}^{n-1}_{\mathbb{R}^n_{\mathcal{Q}}}$ General options for working with Word.		
Proofing	ser Interface options		
Proofing Us Save Us Language Ease of Access E Advanced G Customize Ribbon Quick Access Toolbar C Add-ins C Trust Center Pe	ser Interface options When using multiple displays: ① Optimize for best appearance Optimize for compatibility (application restart required) Show Mini Toolbar on selection ① Show Mini Toolbar on selection ① Collapse the ribbog automatically ① Collapse the ribbog automatically ① Collapse the Microsoft Search box by default ① SegeenTip style: Show feature descriptions in ScreenTips resonalize your copy of Microsoft Office User name: John Smith Initials: JS Adways use these values regardless of sign in to Office. Office Background Office Ineme: Colorful rivacy Settings. nkedIn Features Use LinkedIn features in Office to stay connected with your professional network and keep up to date in your in ② Enable LinkedIn features in my Office applications ①	idustry.	
	Ahard Listadle Fasture Massachistadle Constantiation	Cano	:el

6. Now let us view the document's properties. Click File → Info. Review the information on the right-hand side:



7. Click in the Author field and type your name:

Properties ~				
Size	23.7KB			
Pages	1			
Words	306			
Total Editing Time	3 Minutes			
Title	Add a title			
Tags	Add a tag			
Comments	Add commen	its		
Related Dates				
Last Modified	Today, 10:17 /	MA		
Created	Today, 10:12 A	M		
Last Printed				
Related People				
Author	<mark>ج</mark> م ا	2		
Last Modified By	Not saved ye	Ł		
Related Documents				
Nelated Documents				
Open File Loo	ation			
Show All Properties				

8. Next, open the Properties dialog box by clicking
 Properties → Advanced Properties:

Properties ~	
Advanced I See more d properties	Properties ocument
Total Editing Time	3 Minutes
Title	Add a title
Tags	Add a tag
Comments	Add comments
Related Dates	
Last Modified	Today, 10:17 AM
Created	Today, 10:12 AM
Last Printed	
Related People	
Author	JS John Smith
	Add an author
Last Modified By	Not saved yet
Related Docume	ents
Open File Lo	cation
Show All Properties	

9. The Properties dialog box will open to the Summary tab. (If this tab is not displayed, click it.) You will see the author information that we modified in the Information category:

Activity 1	?	\times						
General	Summary	Statistics	Contents	Custom				
Title:								
Subject	:							
Author:	John	Smith						
Manage	er:							
Compar	iy:							
Catego	ry:							
Keywor	ds:							
Comme	nts:							
Hyperlir base:	nk							
Templat	te: Norm	al						
Save	Save Thumbnails for All Word Documents							
				ОК	Car	ncel		

10. Click in the **Title** field and type "Relationships Handout"

Activity 1-1 Properties							\times
General	Sum	mary	Statistics	Contents	Custom		
Title:		Relati	ionships Hai	ndout			
Subject	:						
Author:		John	Smith				
Manage	r:						
Compar	ıy:						
Catego	ry:						
Keywor	ds:						
Comme	nts:						
Hyperlir base:	ık						
Templat	te:	Norma	al				
Save	Save Thumbnails for All Word Documents						
					OK	Car	ncel

11. Click **OK** to save your changes:

Activity 1	?	\times					
General	Summary	Statistics	Contents	Custom			
Title:	Rela	tionships Ha	ndout				
Subject:							
Author:	John	Smith					
Manage	r:						
Compan	y:						
Categor	y:						
Keyword	ds:						
Commer	nts:						
						_	
Hyperlin base:	k						
Templat	Template: Normal						
🗸 Save	Save Thumbnails for All Word Documents						
				ок 🔓	Can	icel	

12. You will be returned to the Info category. You should see the title that we added:

Properties ~				
Size	23.8KB			
Pages	1			
Words	306			
Total Editing Time	12 Minutes			
Title	Relationships Handout			
Tags	Add a tag			
Comments	Add comments			
Related Dates				
Last Modified	Today, 10:24 AM			
Created	Today, 10:12 AM			
Last Printed				
Related People Author	JS John Smith			
	Add an author			
Last Modified By	JS John Smith			
Related Documents				
Open File Location				
Show All Properties				

13. Save your document as Activity 1-1 Complete. Close Microsoft 365 Word to complete this activity.

TOPIC B: Share a Document

Another key part of collaborating with others is understanding how to transfer documents to them. Microsoft Word offers a number of sharing tools, including OneDrive, and email. In this topic, you will learn how to share documents with others and how to edit shared files.

Topic Objectives

In this session, you will learn:

- About Microsoft OneDrive
- About the sharing options available in Microsoft Word
- How to edit a shared file

OneDrive

OneDrive is Microsoft's cloud-based solution for storing and sharing files. It is integrated with both the desktop and online versions of Microsoft Office.

To save a document to OneDrive, ensure that you are signed into a Microsoft account. Then, click File \rightarrow Save As \rightarrow Choose your OneDrive account:



Now, select the desired location, and then click the **Save** button to upload your document to OneDrive:

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Save	Sites - Acme Widgets	We didn't find anything to show here.	
Save As	jsmith@acmewidgets.onmicrosoft.com		
Print	OneDrive - Personal		
Share	getwindowsapps@outlook.com		
Export	OneDrive - Personal jsmith@acmewidgets.onmicrosoft.com		
Transform	Other locations		
Close	This PC		
	Add a Place		
	Browse		

Sharing a Document

Once your document is saved to a cloud location such as OneDrive, you can quickly share it using the **Share** command near the top right-hand corner of the ribbon interface:

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Once you click this command, you will see the **Send Link** dialog box:

Here is an overview of the dialog box's commands.

- **1.** Click the ellipsis to manage access to the document.
- 2. Click this menu to set permissions.
- **3.** Enter the recipient's email address and a message to them.
- **4.** Choose to send a copy of the document, rather than a link.
- 5. Click "Send" to complete the process.
- Alternatively, you can use these commands to copy a link to the file or use Outlook to send an email message.

Once you click "Send," your document will be shared and you will be returned to the main Word window.

Editing a Shared File

When you open a shared file, you will see a notification by the Share icon if others are editing it too:

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Clipboard 🕞 Font	Paragraph	Styles	5 Editing	Voice Sensitivit	Editor

You can begin editing in real-time with other user(s) as soon as you open the shared document. Word automatically begins simultaneous sharing when two or more authors have the document open. Hovering your mouse over the notification icon next to the share button will give you status information:

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Add a message (optional)		
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Word will keep track of who is editing what to prevent conflicts:



Activity 1-2: Sharing Documents

In this activity, you will save a Microsoft Word document to OneDrive and then share the document with a partner. You must be signed into your Microsoft account and have a OneDrive account available in order to complete this exercise.

1. To begin, open Activity 1-2:



2. Click File → Save As:

3. In the Save As category, choose your OneDrive account:



4. Select the location in your OneDrive and click **Save** to save your document

		Activity 1-2 - Saved to this PC	John Smith
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		Activity 1-2	
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5. To create a sharable link and allow others to make changes to your document, click the **Share** button in the top right-hand side of the ribbon.



6. The Send Link dialog box will open. Enter your partner's name or email address and click **Send**:



7. Click Send:



8. A dialog box will appear advising you that your link has been Sent. From here you can simply close the box and paste your link into the place where you wish to copy and/or share it. Close the dialog box by clicking the X in the upper right-hand corner:



9. Partner B, open your web browser and log in to your Microsoft account:



10. Enter your account name and click **Next**:



11. Enter your password and click Sign in:



12. To open, click **OneDrive**:

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13. Click **Shared**:



14. A list of shared documents will be displayed in the **Shared with you** folder. Click Activity 1-2 to open it:



15. The document will open in Word Online in a new browser tab where you can begin editing:

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Page 1 of 1 19 words English (U.S.)) - 100% + Give Feedb	▼ ack to Microsoft

16. You should see a notification that your partner is also editing this document.

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17. Add the text "Be sure to include gap analysis" under the second heading:



Partner A will see this happening in real time:



19. Partner A should now add a new heading, "Create New Processes," after this text. Partner B should see this happening in real time:



20. Partner A, save a copy of the completed document in your Exercise Files folder as Activity 1-2 Complete. Both partners can now close all open windows to complete the activity.

TOPIC C: Work with Comments

In the past, if you handed off a report to be edited by hand, it would usually return with illegible scribbles and scrawls. Microsoft Word has improved the document editing process by implementing a commenting feature. Multiple users can add comments to a document, pointing out anything they feel is relevant.

In this topic, we will learn all about comments, including how to insert, edit, reply to, navigate through, and delete them.

Topic Objectives

In this session, you will learn:

- How to insert and edit comments
- How to reply to a comment
- How to mark a comment as done
- Techniques for navigating through comments
- How to delete comments

Inserting Comments

To insert a comment, first select the portion of text on which you want to comment. (If you want to comment on just one word, click to place your cursor in that word.) Then, click **Review** \rightarrow **New Comment**:



You will then see a balloon appear on the right-hand side of the screen. Simply type your comment into this balloon:

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Once you are done typing your comment, click outside the comment to continue editing the document.

Editing Comments

Let us say you have made a comment and decide to change it. First, click the balloon icon to display the comment:



Then, click and type to make your changes. outside of the comment to return to the document:



Replying to Comments

To reply to a comment, click the reply icon below the comment:



Then type your reply:

Click outside of the comment to close it.



Resolving Comments

+

To resolve a comment, open it for editing. Then, click the **Resolve** button and the comment will be resolved:



Now, the comment will be grayed out:



Navigating Through Comments

If your document contains multiple comments, you can use the **Previous** and **Next** buttons in the Comments group of the Review tab to navigate through them quickly:



If you have reached the end of all the comments in the document, clicking **Next** will return you to the first comment in the document. Similarly, if you are currently reading the first comment and you click Previous, Word will show you the last comment.

You can also click **Review** → **Show Comments** to see comments on the right-hand side of the document. Resolved comments will be formatted with a light gray font:

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Deleting Comments

To delete a comment, place your cursor in the commented text or open the comment itself for editing. Then, click the Delete command on the Review tab:



You can also click the drop-down arrow under the Delete command to view more options:



With this menu, you have the option to delete all comments currently shown, as well as all comments in the current document.

Activity 1-3: Working with Comments

In this activity, you will add comments to a document.

1. Open Microsoft 365 Word and open Activity 1-3:


Select the words "Whether we like it or not" under the Appearance heading. Click
 Review → New Comment:

3. Type "Why does this have emphasis?" into the comment bubble that appears:



4. Select the paragraph under the Similarity heading. Click **Review** → **New Comment**:



5. Type "Consider revision."

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- **6.** Scroll down in the document. You will see a comment by another user. Move your mouse over it and click the **Reply** icon:
 - AutoSave 💽 🗄 り・ Activity 1-3 👻 ₽ Set Mailings Review Thesaurus Word Count Aloud Accessibility Show Comments Changes © Reviewing Pane v Hide Ink * Editor Restrict Editing Í anslate Language New Delete Pre Comment Compare Comments Tracking 5<u>1</u> 入・・・7・・ Accessibility Language · Y · 1 · · · 1 · · · · 2 When it comes to relationships, the better you are at connecting with people, the better your quality of life becomes. While connecting with people brings tremendous rewards, it is hard work too. Here are some of the influences at work when we connect with others. Appearance Appearance Whether we like it or not, physical attractiveness plays a role in helping us form favorable first impressions of another person. Physical attractiveness is very subjective, and varies from one culture to another, but there are some standards we can count on. Cenerally, tallet people are seen as more competent. People who look approachable are more attractive and more positive. This means that you have to pay attention to how you look in your role as a professional salesperson. John Smith Why does this have emphasis? John Smith Consider revision Individuals are drawn to one another when they share common interests or goals. Common ground is just that: finding some areas of similarity with another person. People who love sports end to tak about their kavoite games together, just as people with children or pets talk about their latest adventures with them. Finding common ground can be an important part of relationship hulding. relationship building. Comple People may be attracted to others who fulfill a particular need at a particular time in their lives. If you know their needs and you can fulfill these needs with your own talents or with your products or services, it is easier to create an interest in what you offer. Jane Gibson 4 minutes ago Tie these into your sales training! CREpty CResolve
- 7. Type, "Added to Building Relationships course."



8. Right-click the original comment. Click **Resolve Comment** on the original comment. The comment will then be grayed out:



9. Now that you have commented in the document, let's review your comments. Click the **Next** button in the Comments group of the Review tab twice:



10. You will be returned to your comment about the emphasis, which should probably be removed entirely. Click inside the comment and change the text to "Please remove this emphasis."

Appearance I	
Whether we like it or not, physical attractiveness plays a role in helping us form favorable	John Smith 13 minutes ago Please remove this emphasis.
first impressions of another person. Physical attractiveness is very subjective, and varies from one culture to another, but there are some standards we can count on. Generally, taller people are	💭 Reply 🛛 Resolve
seen as more competent. People who look approachable are more attractive and more positive. This means that you have to pay attention to how you look in your role as a professional salesperson.	

11. Click **Review** \rightarrow **Next** (in the Comments group) to advance to the second comment:



12. On second thought, this paragraph sounds OK. Click the **Delete** command on the Review tab to delete this comment:

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	Here are some Appearance Whether we lin first impressions of culture to another, seen as more comp This means that yo salesperson.	the influences Cife decided on the influences of the influences of the influence of the inf	ck for more options, such as eting all comments in the current or just the ones shown the screen. Attractiveness plays a role in ical attractiveness is very sul andards we can count on. Ge k approachable are more att n to how you look in your re	ers. helping us form favorable ejective, and varies from one nerally, taller people are ractive and more positive. le as a professional	John Sm Please re	ith move this emphasis.
	Similarity Individuals are ground is just that: sports tend to talk about their latest a relationship buildin	drawn to one another finding some areas of about their favorite ga dventures with them.	when they share common in of similarity with another imes together, just as people Finding common ground ca	nterests or goals. Common person. People who love with children or pets talk a be an important part of	John Sm Consider	ith 14 minutes ago revision. 💭 Reply 🛛 Resolve

13. Click **Review** → **Next** once more:



14. The final comment is the one that we replied to and marked as complete. Notice the differences in its appearance:



15. Save your document as Activity 1-3 Complete. Close Microsoft 365 Word to complete this activity.

TOPIC D: Compare Document Changes

Another useful tool when collaborating with other users is the ability to compare different versions of a document. In this topic, you will learn about the various options available with the Compare feature and how to work with comparison results.

Topic Objectives

In this session, you will learn:

- About legal blackline
- How to compare two documents and modify settings

• How to accept and reject changes in a compared document

Legal Blackline

Microsoft Word's **compare** feature is also known as **legal blackline** because of the way it marks up documents. This feature will compare two documents and show the changes between them, without altering the original documents:



Comparison Settings

To compare two documents, open at least one of the documents that you want to compare. Then, click **Review** \rightarrow **Compare** \rightarrow **Compare**:



The Compare Documents dialog box will open:

Compare Documents	? ×
Original document	Revised document
Lab <u>e</u> l changes with	Label changes with
5 More >>	A OK Cancel

The most important part of this dialog box is choosing the **original document (1)** and the **revised document (2)**. (You can do this via the drop-down menus or the Browse button. You can also reverse the labels for the documents by clicking the **Swap button**, marked with a **(3)** in the image above.) As well, you can choose how to **label changes** on each document **(4)**. Click **More (5)** to view and set advanced options.

Once you are ready, click **OK** to compare the documents:

Compare Documents	? ×
Original document	<u>R</u> evised document
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With the default settings, the comparison will look like this:

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John Smith Deleted To go the Microsoft website, go to <u>http://www.microsoft.com</u> . 201 words 😥 English (Canada) 🐻 🖏 Access	billy: Good to go		Vice provides a powerful way to help you prove your point. When you click Online Video, you can paste in the embed code for the video you want to add. You can also type a keyword to search online for the video that best fits your document. To make your document look professionally produced, Word provides header, cover page, and text box designs that complement each other. For example, you can add a 30, Focus III IIII IIIIIIIIIIIIIIIIIIIIIIIIIII

On the left-hand side is the **Revisions Pane (1)**, which details every change that was made. The **compared document** (a new document that shows the original document with changes made) is in the center **(2)**. On the right-hand side, you can see the **original document (3)** and the **revised document (4)**.

Accepting and Rejecting Changes

The document in the center pane (Compared Document) shows the original document as if tracked changes had been made. You can navigate through this center document and reject or accept the various changes, and then save the document to use those new changes.

These commands can be found in the **Changes** group of the Review tab, or by right-clicking a change in the Revisions Pane:



Here is a brief overview of each command in the Changes group on the Review tab:

Accept	Accepts the current change and moves to the next change. The drop-down arrow offers options to accept this change, accept the change and move to the next change, accept all changes currently shown, and accept all changes in the document.
Reject	Rejects the current change and moves to the next change. The drop-down arrow offers options to reject this change, reject the change and move to

	the next change, reject all changes currently shown, and reject all changes in the document.
Previous	Move to the previous change.
Next	Move to the next change.

Activity 1-4: Comparing Document Changes

In this activity, you will compare two documents.

1. To begin, open Activity 1-4A and Activity 1-4B in Microsoft 365 Word. Maximize both documents:



2. In either document, click **Review** → **Compare** → **Compare**:

File Home	Insert	Draw	Design Layout	References Mailings	Review View	/ Help					🖻 Share	Comm
Editor Thesaurus	A ⁽⁾⁾ Read Aloud	Check Accessibility	Translate Language	New Delete Previous Comment	Next Show Comments	Track Changes ~ Reviewing	Markup ~ [irkup ~ Ai g Pane ~ Ai	ccept Reject	Compare	Block Res	trict Hide	Resum
Proofing	Speech	Accessibility	Language	Comment	5	Tracking	5	Changes	Con doc	n pare npare two ver ument (legal l	tions of a a	desum
									Con Con auth	bine nbine revision nors into a sin	s from multip gle document	le
									EH Show S			>

3. The Compare Documents dialog box will open. Choose Activity 1-4A as the original document.

Compare Documents	? ×
Original document Activity 1-4A	Revised document
Activity 1-4A Activity 1-4A.docx Activity 1-4B	La <u>b</u> el changes with
Activity 1-4B.docx Activity 1-7.docx Activity 6-1.docx	OK Cancel

4. Choose Activity 1-4B as the revised document:

Compare Documents	?	×
Original document Revised document		
Activity 1-4A 🗸 🦾 Activity 1-4B	\sim	
Lab <u>e</u> l changes with Activity 1-3.docx Activity 1-3.docx Activity 1-3.docx Activity 1-3.docx Activity 1-4A	^	
More >> Activity 1-4A.docx Activity 1-4B	~	el

5. Type "John Smith" into the "Label changes with" text box under the "Revised document" heading:

Compare Documents	? ×
Original document Activity 1-4A	Activity 1-4B
Lab <u>e</u> l changes with	Label changes with John Smith
<u>M</u> ore >>	OK Cancel

6. Click **OK** to perform the comparison:

Compare Documents	? ×
Original document	Revised document
Lab <u>e</u> l changes with	La <u>b</u> el changes with John Smith
<u>•</u>	- -
More >>	OK

7. The Compare Result will now be displayed:



(If you see only one document, click **Review** → **Compare** → **Show Source Documents** → **Show Both**.)

8. There are two typos that are resolved in the compared document. In the Revisions Pane select second element of the first change ("texts"). Right click the element you just selected, click **Accept Insertion**:



This will accept both the deletion of the typo and the insertion of the correct word. The preview results will be displayed in the center document pane.

9. Repeat step 8 for the second fix ("accepting"):



Reluctance to trust your own opinions, or share them with others

 The rest of the changes are formatting-based. Click Review → Accept → Accept All Changes:

AutoSave 💽 🔛	୭-୧	Ŧ	Compare R	esult 10 - Word	P Sea	ch						Ja	hn Smith 🥠 S	œ	- 8 ×
File Home Inser	t Drav	v Design	Layout Refere	nces Mailings	Review View He	lp								🖻 Share	Comments
Editor Thesaurus Word Count	Al) Read Aloud	Check Accessibility	Translate Language	New Delete Comment ~	Previous Next Show Comments	Track Changes	All Markup Show Markup ~ Reviewing Pane	•	Accept	Compare	Block Restrict Authors - Editing	Hide Ink *	Resume Assistant		
Proofing	Speech	Accessibility	Language		Comments		Teacking	9	Accept and Move to New	d	Protect	Ink	Resume		
									Accept This Change						
									Accept All Changes Sho	wn					
									Accept All Changes						
									Accept All Changes and	Stop Tracking	9				

11. Click **Review** → **Compare** → **Show Source Documents** → **Hide Source Documents**:

A	toSave 💽 Off		୍ର ୧	÷	Compare R	esult 10 - Word		P Search							Joh	n Smith 🥠	•	-
File	Home	Insert	Drav	w Design	Layout Refere	nces Mailings	Review View	v Help									남 Share	, P.
Edit	Proofing	= 123 Word Count	Read Aloud Speech	Check Accessibility Accessibility	Translate Language	New Delete	Previous Next Co	Show mments Ch	Track hanges - Tracking	× Ac	Changes	Compare	Block Authors ompare_ ompare tw ocument () ombine ombine resuthors into	Restrict Editing	f a te).	Resume Assistant Resume		
												🔛 Sho	v Source Dr	cuments	:	Hid	Source Doc	uments

12. Click the X button on the Revisions Pane to close it:

AutoSave 🚥 🖽 %~ 🖔 🔻	Compare Result 13 - Word	Ø Search		John Smith 🥵 🖻 — 🗗 🗙
File Home Insert Draw Design	Layout References Mailings Review	View Help		🖻 Share 🛛 🖓 Comments
Editor Thesaurus Word Count Proofing Cont Speech	Translate Language Language	Vert Show Comments Comments Track Changes - Track Track Changes - Track Tracking	Compare Compare Protect	strict Hide Resume Assistant Ink Resume
Revisions *	×.			
∩ erevisions	Close What is Self-Esteem? Defining Self-Esteem While some texts and teachers will tell yo case) which defines them as practically th	ou that self-esteem and confidence are different, th he same. As a result, we are going to discuss self-est	y do admit to an overlap while trying to keep them separate. W em and self-confidence as largely the same thing; your percept	te're inclined to agree with the dictionary (Oxford in this ion of your abilities and your beliefs about yourself.
	Characteristics of low self-esteen	n can include the following:		
	o Social withdrawal			
	a Bouts of sedness			
	 Anxiety and/or emotional tu 	urmoil		
	 Lack of social skills (i.e. meet 	ting people easily, making small talk, establishing re	ationships quickly and easily)	
	o Depression			
	o Eating disorders			
	 Difficulty accepting complim 	nents		
	 Focusing on negative things 	i or ideas (in other words, pessimism)		
	o Self-neglect			
	 Excessive focus on what oth 	her people think of you		
	 Treating yourself poorly, but 	it not other people		
	o Lack of confidence in trying	new things		
	o Reluctance to indulge your o	desires		
	 Reluctance to trust your own 	n opinions, or share them with others		
178 words 🔲 English (Canada) 🔞 🕀 Access	ibility: Good to go			(b) Focus 🛍 📕 🌆 – — + 100%

13. Save this compared document as Activity 1-4 Complete. Close Microsoft 365 Word to complete this exercise.

TOPIC E: Review a Document

In the last topic, you were introduced to the Track Changes feature. This feature can be used on its own for handling basic changes. Or, you can use it with the Compare and Combine features for advanced collaboration and document management. In this topic, we will focus on this powerful tool.

Topic Objectives

In this session, you will learn:

- About the Track Changes feature
- How to turn Track Changes on or off
- How to view markup in different ways
- How to set Track Changes options
- How to add the Track Changes indicator to the status bar
- How to review tracked changes

Track Changes

The **Track Changes** feature records every change to the document, as well as when that change was made and who made it. Changes can be filtered by user, change type, and more. However, the Track Changes feature must be enabled in order for these changes to be saved. Only changes made from the point when the feature was turned on will be tracked.

Turn Track Changes On and Off

You may enable the Track Changes feature by using one of the following methods:

- Use the keyboard shortcut Ctrl + Shift + E
- Click Review → Track Changes

AutoSave 💽	₩ 8 9	• ∪ -	Usin	g Word 365	_Version 1 - Sav	ved 🕶	⊖ Searc	ch			John Sm	ith JS	Æ	-		×
File Home	Insert	Draw	Design I	Layout	References	Mailings	Review	View Help					🖻 Shar	e 🖓	Comme	ents
Editor Thesaurus	Read Aloud	Check Accessibility	Language	New Commen	V Pr V Pr Delete t v Psh	evious ext now Comments	Track Changes	All Markup	*	Accept	Compare Č	Protect *	Ink	Resume	2	
Proofing	Speech	Accessibility			Comments	s	L.	f Tracking	٦.	Changes	Compare					~

After you have enabled Track Changes, you can work with the document normally by editing and formatting text, adding graphics, and using all of Word's other features. However, your changes will be recorded in the document. These changes are called **markup**, as they literally mark up your document as if you were editing it on paper.

To turn the feature off, click the Track Changes button again.

Markup Views

To view the markup in a document, click the red line that appears in the margin:



The line will now appear gray and the markup will be shown:



You can also click the "**Display for Review**" drop-down menu on the Review tab to choose how changes are shown:



This drop-down menu contains four options:

Simple Markup	The default setting. Shows markup as lines within the margin. Click each line to see markup details.
All Markup	Shows all markup directly in the document.
No Markup	Shows the document as if all markup has been accepted.
Original	Shows the original document with all changes and comments hidden.

It is important to note that these choices do not remove any tracked changes or comments.

You can also use the Show Markup menu to control what types of markup elements are displayed in the document, or to filter out markup from particular reviewers:



Like the Show Markup menu, no markup will be permanently removed using the commands in this menu.

Track Changes Options

To change how tracked changes appear in your document, click the option button in the Tracking group on the Review tab:

AutoSave 💽 Of	e e	१ ७ -		Using V	Vord 365 👻		𝒫 Sear	irch				
File Home	Insert	Draw	Design	Layout	References	Mailings	Review	w View	Help			
Editor Thesaurus	Read Aloud	Check Accessibility	Translate	A Language	New	Delete Previous	Next C	Show Comments	Track Changes ~	Criginal Show Markup ~ Reviewing Pane	*	Accept Reject
Proofing	Speech	Accessibility	Lang	juage		Comment	ts			Tracking	151	Changes
											Ch	ange Tracking Options

The Track Changes Options dialog box will appear:

Track Changes Options			?	×
Show <u>Comments</u> <u>Ink</u> Insertions and <u>D</u> eletions <u>F</u> ormatting	⊻ Hi ⊻ O ₽i	ighlight Updates ther Authors c <u>t</u> ures By Comme	nts	
<u>B</u> alloons in All Markup view s Reviewing <u>P</u> ane:	how:	Comments and f	ormat	tting 🗸
Advanced Options Cl	nange	User <u>N</u> ame OK	Ca	ancel

Here, you can change every aspect of how your changes are tracked. To apply options, click **OK** when you have finished setting your options.

The Track Changes Indicator

You can tell if Track Changes is enabled by looking at the Review tab. If the command is shaded, then Track Changes is turned on:

AutoSave 💽 o		9-℃-		Using W	/ord 365 👻		𝒫 Search						
File Home	Insert	Draw	Design La	ayout	References	Mailings	Review	View	Help				2
/ Editor ⊡ Thesaurus	A))		a a	AL I						Criginal Show Markup ~	~	P	Previous Next
-123 Word Count	Aloud	Accessibility	Translate La	nguage ~	Comment	Velete Previous	Next Si Com	now	Track Changes ~	🔁 Reviewing Pane	~	Accept	× Keject
Proofing	Speech	Accessibility	Langua	ge		Comment	s			Tracking	۲ <u>م</u>		Changes

You can also add an indicator to the status bar. To do this, right-click the status bar and click Track Changes:



Now, you can see whether the feature is on or off just by looking at the status bar. You can also click the indicator to toggle it on or off:



Reviewing Changes

Let's say you have received a document with tracked changes. First, you should ensure that all markup is being shown. This will make it a lot easier to view all of the changes:



Now, you can use the Changes group on the Review tab to decide what to do about the changes by either accepting or rejecting them. You can also browse changes by clicking **Previous** or **Next**:

AutoSave Of	089	≂ ٽ~(Using	Word 365 👻		𝒫 Search			_	
File Home	Insert	Draw	Design Layout	References	Mailings	Review View	v Help			1
Editor Thesaurus	A)) Read Aloud	Check Accessibility	Translate Language	New De Comment	elete Previous	Next Show Comments	Track Changes	All Markup All Markup	Accept Reject	Compare
Proofing	Speech	Accessibility	Language		Comments	s		Tracking F	د Changes	Compare

You can also find the Accept Insertion and Reject Insertion commands on the right-click menu:



If you accept a change, that change becomes part of your document and any markup (including corresponding vertical lines in the left margin) will be removed. If you reject a change, the change and any associated markup will be removed.

Activity 1-5: Reviewing a Document

In this activity, you will perform a second review of a document. This will involve making some changes of your own and reviewing existing changes.

1. Open Microsoft 365 Word and open Activity 1-5:



2. First, let us add the Track Changes indicator to the status bar. Right-click a blank area of the bar and click **Track Changes**:

AutoSave 💽 🖽 🖫 😕 🤜 🤜	Activity 1-5 - Saved to this PC - 🖉 Search		John Smith 🤱	
File Home Insert Draw Image: Check Image: Check	Design Layout References Mailings <u>Review</u> View Tanciste Language <u>New</u> Delete <u>New</u> Language <u>Comment</u> Show Comments Chan	Help Customize Status Bar Customize Status Bar Ecromatted Page Number Section Trai Page Number	1 1 Restrict 1 Editing Page 1 of 1 t	Share Comments
	What is Solf Estacm?	Vertical Page Position Line Number Column V Word Count	1* 1 1 175 words	
	VVTIGLIS SEIT-ESLEETIF Defining Seit-Esteem Wile some <u>bits</u> and teachers will tell you that self-esteen overlap while trving to keep them separate. We're indine them as practically the same. As a reauly, are are going to same thing; your perception of your abilities and your be	Cparacter Count (with spaces) Spelling and Grammar Check and cor at to agre sits says Signatures Signatures	1093 characters Errors English (Canada) Off	
	Characteristics of low self-esteem can include th	e follow <u>Permissions</u>	Off	
	 Social withdrawal Boots of sadness Anxiety and/or emotional turmoil Lack of social skills (i.e. meeting peopretationships quickly and easily) Depression Eating disorders 	Irack Changes Caps Lock Qvertype Selection Moge ✓ Marco Recording	Off Off Insert Not Recording	
	 Difficulty accepting compliments Focusing on negative things or ideas Self-neglico Excessive focus on what other people Treating yourel poorly, but not oth Lack of confidence in trying new thirs Reluctance to indulge your desting Reluctance to trust your own opinion 	In othe v Accessibility Checker A v Upload Status think q v Decument Updates Available v Focus v Grous v Jew Shortcuts v Jew Shortcuts v Jew Shortcuts	ccessibility: Investigate	
Dana 1 of 1 175 words DD Enalish (Can	undu) 📅 dia Accardibilita Investigata	✓ Zoom	100%	+ 100%

(If there is already a checkmark beside this entry, skip to the next step.)

3. Click outside the menu to close it. You can see that Track Changes is currently turned off:

Page 1 of 1 175 words 🛛 🖓 English (Can	nada) Track Changes: Off
--	--------------------------

4. Click the Track Changes indicator on the status bar to enable it:

Page 1 of 1 175 words 🙀 English (Canada) Track Changes: Off N 🗟 🖽 Accessibility: Investigate Word is not tracking changes. Click or tap to track changes.

6.

5. Click the **Review** tab to confirm the feature is enabled:



(Remember, the button should be shaded.)

Now, let's review the document. There is a typo in the first line. Correct it to "texts:"



(If there is already a checkmark beside this entry, skip to the next step.)

7. The previous editor has added an unnecessary modifier to the word "dictionary." Let us reject this change by right clicking the word and choosing the appropriate option:

What is Self-Esteem?	Calibri (Body) → 10 → A^ A 💞 🗛 →
Defining Self-Esteem While some texts and teachers will tell you that self-esteem and confidence are dif overlap while trying to keep them separate. We're inclined to agree with the <u>Oxfor</u>	$\begin{array}{c c} \mathbf{B} & I & \underline{\cup} & \underline{\wedge} & \underline{\wedge} & \underline{\leftarrow} & \leftarrow$
them as practically the same. As a result, we are going to discuss self-esteem and s same thing: your perception of your abilities and your beliefs about yourself.	а Да Си <u>т</u> Па <u>С</u> ору
Characteristics of low self-esteem can include the following:	Paste Options:
 Social withdrawal 	Accept Insertion
 Bouts of sadness Anxiety and/or emotional turmoil 	Reject Insertion
 Lack of social skills (i.e. meeting people easily, making smooth) 	Irack Changes
 relationships quickly and easily) Depression 	ତ L <u>i</u> nk >
 Eating disorders 	ᅻᄀ New Co <u>m</u> ment

8. Select the bullets and remove the Italics formatting:



9. Finally, right click the last typo correction (in the seventh bullet) and click **Accept Insertion**:

AutoSave 💽 🕅 🗒	°-0 -	Activity 1-5 +					John Smith JS	æ	- 🗆 ×
File Home Inse Paste Copy Clipboard	Calibri B I U	Design Layout References $\begin{array}{c c} & 12 \\ \hline & 12 \\ \hline & a \\ \hline \hline & a \\ \hline \hline & a \\$	Mailings Review View H III → III → III → III III → IIII → III →	AaBbCcDdi AaBbCcDdi 1 Normal No Spacing	AaBbC(AaBbCc Heading 1 Heading 2 Styles	AaBbCcD Heading 3	Dictate Ser	Share	e 🖓 Comments
Page 1 of 1 1 of 175 wer	as []) Englis	What is Selfee Defining Self Extern where a better our processor them as practically the self characteristics of low Characteristics of low Char	steem? If you have solutions to agree with the coll a ballefs about yourself. the following: the following: the following: the following: C_{2} A A C C_{2} C	inferent, they do admit to an oracid deticmany which define iself-confidence as largely th nall talk, establishing ssimism) th others	-	John Smith A few seconds ago formatted: Fort: Not Ital:	80 25 16		+ 10%

10. Save your document as Activity 1-5 Complete. Close Microsoft 365 Word to complete this activity.

TOPIC F: Merge Document Changes

There is yet another situation that you might encounter when collaborating with others. Imagine that you have sent a document to several people for revision. You now have multiple copies of the same document, each with their own comments and revisions. Microsoft Word's Combine feature can help you manage these different versions.

Topic Objectives

In this session, you will learn:

- How to combine document modifications from multiple reviewers
- How to use the Revisions pane
- How to resolve style conflicts

Combining Modifications from Multiple Reviewers

The Combine feature works a lot like the Compare feature that we examined in Topic D. To begin, open the two documents that you want to combine. Then, click **Review** \rightarrow **Compare** \rightarrow **Combine**:

AutoSave 💽 🖫 🏷 🎽 Usi	ng Word 365_Version 1 - Saved to this PC 👻	𝒫 Search			John Smith 🥵	•	- 0	×
File Home Insert Draw Design	Layout References Mailings R	teview View Help			e	ි Share	🖓 Com	ments
Editor Thesaurus Word Count Aloud Count	Translate Language	ious Next Show Comments Changes	All Markup v Show Markup v Reviewing Pane v	Previous Next Compare	Block Restrict Authors ~ Editing	Hide Ink ~	Resume Assistant	
Proofing Speech Accessibility	Language Com	nents	Tracking Fal Chan	ges Co	ompare ompare two versions of a ocument (legal blackline)		Resume	^
					o <u>mbine</u> ombine revisions from m uthors into a single docur	ultiple ment.		
				Shov	v Source Documents	>		

The Combine Documents dialog box will appear, which is very similar to the Compare Documents dialog box that we explored earlier:

Combine Documents	? ×
Original document	Revised document
Lab <u>e</u> l unmarked changes with:	La <u>b</u> el unmarked changes with:
5 More >>	
more and	

At the top, you can choose **the original document (1)** and the **revised document (2)**. (You can do this via the drop-down menus or the Browse button. You can also reverse the labels for the

documents by clicking the **Swap button**, marked with a **3** in the sample image.) As well, you can choose how to **label any unmarked changes** in each document **(4)**. Click **More (5)** to view and set advanced options.

Once you are ready, click **OK** to combine the documents:

Combine Documents	?	Х
Original document Using Word 365_Version 1	rsion 2 🗸	
Lab <u>e</u> l unmarked changes with: Jane Gibson La <u>b</u> el unmarked cha	nges with: John Smith	
, ↔		
More >>	OK Cance	I

By default, the documents will be combined into a new document, with the results shown as tracked changes:



You can now work with the document as you would normally.

Revisions Pane

The Revisions Pane is another tool that you can use to review and manage changes made to your document. To turn it on, click the **Reviewing Pane** dropdown and choose whether you want the pane to be horizontal or vertical. By clicking on the button, itself, the Revisions pane will be displayed vertically:



For this example, the Revisions pane has been placed vertically. It is visible on the left-hand side of the window:



As you can see, this pane summarizes and categorizes every tracked change made to the document. Simply click a change to display and select it.

Resolving Style Conflicts

If Microsoft Word detects a style conflict when comparing or combining documents, Microsoft Word will apply the formatting from the revised document. It will be tracked like a regular change, and can be managed as such from the Revisions pane:



If both sets of documents contain formatting changes, the changes from the second document will be imported into the newly combined document when the combine is performed:

Microsoft Word	?	\times
Word can store only one set of formatting changes in t document. Choose which set of formatting changes to	the final, keep.	merged
Keep formatting changes from: <u>Your document (Using Word 365_Version 1)</u> The <u>o</u> ther document (Using Word 365_Version 2))	
Continue with <u>M</u> erge	Ca	ncel

Activity 1-6: Merging Document Changes

In this activity, you will use the Combine feature to merge two different versions of a document together, as well as attribute unmarked changes to the document's first editor.

1. To begin, open Activity 1-6A and Activity 1-6B in Microsoft 365 Word. Maximize both documents:



2. In either document, click **Review** → **Compare** → **Combine**:



3. The Combine Documents dialog box will open. Choose Activity 1-6A as the original document:

Combine Documents				?	×
<u>O</u> riginal document			Revised document		
Activity 1-6A	\sim			\sim	
Activity 1-4B.docx Activity 1-4B.docx Activity 1-5 Complete.docx	^		La <u>b</u> el unmarked changes with:		
Activity 1-5.docx Activity 1-5.docx Activity 1-6A	_	÷	ОК	Cano	el

4. Choose Activity 1-6B as the revised document:

Combine Documents		?	×
Original document	<u>R</u> evised document		
Activity 1-6A 🗸 🦢	Activity 1-6B	\sim	
Lab <u>e</u> l unmarked changes with: Author	Activity 1-5.docx Activity 1-5.docx Activity 1-6A → Activity 1-6A	^	
More >>	Activity 1-6B Activity 1-7.docx	· · ·	el

5. Change the first "Label unmarked changes with" field to "John Smith." As well, change the second "Label unmarked changes with" field to "Jackson Motton:"

Combine Documents	? ×
Original document Activity 1-6A.docx 🗸 🖌 🖨 Lab <u>e</u> l unmarked changes with: John Smith	Revised document Activity 1-6B.docx La <u>b</u> el unmarked changes with: Jackson Motton
More >>	OK Cancel

6. Click More to view advanced options:

Combine Documents	? >	<
Original document	<u>R</u> evised document	
Activity 1-6A 🛛 🖌 🧀	Activity 1-6B	1
Lab <u>el</u> unmarked changes with: John Smith	Label unmarked changes with: Jackson Motton	
÷		
More >>	OK Cancel	

7. Ensure that all options in the "Comparison settings" section are checked. As well, ensure that the "Show changes in" option is set to "New document." Click OK to combine the documents:

Combine Documents		?	×
Qriginal document Activity 1-6A Labgl unmarked changes with: Author <<< Less Comparison settings ✓ Insertions and deletions ✓ Moves ✓ Comments ✓ Formatting ✓ Case changes	Revised document Activity 1-6B Label unmarked changes with: Author Tables Tables Headers and footers Footnotes and engnotes Textboxes Fields	Cano	cel
✓ White space Show changes Show changes at: ○ Character level 	Show changes in: Original documen <u>t</u> Rev <u>i</u> sed document New doc <u>u</u> ment		

8. Word has updated the way it handles Style conflicts. Instead of having you choose between old and new styles you now get a fluid layout of your document allowing you to resolve conflicts under the Review → Changes submenu.



9. If there are conflicting styles, you will be given a chance to resolve them with this dialog box. Make your selection and click the Continue with Merge button to combine the documents:



10. You will now see the combined document with a variety of changes. The different colors indicate different authors:



(If your view looks different, click **Review** → **Compare** → **Show Source Documents** → **Show Both**.)

11. Save the combined document as Activity 1-6 Complete. Close Microsoft 365 Word to complete this activity.

Microsoft 365 Word: Part 3

Summary

We began this lesson with information on configuring Microsoft Word to optimize file collaboration by modifying document properties and your user information. We also learned about different ways to share documents with other users via the Share category of Backstage view as well as how to edit a shared document. We then took an in-depth look at the variety of reviewing features that are available in Microsoft Word, including commenting, track changes, the Compare feature, and the Combine feature.

LESSON 2: ADDING REFERENCE MARKS AND NOTES

Lesson Objectives

In this lesson you will learn how to:

- Add captions to objects
- Insert cross-references
- Add bookmarks and hyperlinks
- Insert footnotes and endnotes
- Add citations
- Insert a bibliography

TOPIC A: Add Captions

In this lesson, we will learn about the various types of referencing tools that are available in Microsoft Word. We will start with the most basic tool: captions.

Topic Objectives

In this session, you will learn:

- What a caption is
- How to add a caption to an illustration
- How to use the Caption dialog box

Captions

Captions allow you add text descriptors to visual elements in a document, such as pictures or charts. In addition, they are used as reference points for crossreference links and as entries for tables of figures. Here is a sample caption for a chart:



Adding Captions

To insert a caption, click the drawing or figure that you would like the caption to be applied to. Then, click **References** \rightarrow **Insert Caption**:



Caption Dialog Box

After you click the Caption command, the Caption dialog box will appear on your screen. Here, you can choose what label you would like to use, as well as its positioning. By default, Word labels each caption as "Figure" and will place this caption beneath the selected item. Simply type your caption and click **OK**:

The caption will then be added to the graphic.

There are a variety of commands available in the

Caption dialog box that you can use to customize your caption:

- Label and Position Options: Choose the label for the caption (Figure, Table, etc.) and its position.
- **Exclude Label:** Do not include the label with this caption.
- New Label: Create a custom label.
- **Delete Label:** Remove the custom label.
- Numbering: Customize the number format for captions.
- AutoCaption: Automatically create captions when inserting particular types of objects, such as Excel charts.

Caption			?	×				
<u>C</u> aption:								
Figure 1: Yearly Sales Projections								
Options								
<u>L</u> abel:	Figure ~							
Position:	Below selected item							
Exclude label from caption								
<u>N</u> ew Label		Delete Label	N <u>u</u> mber	N <u>u</u> mbering				
<u>A</u> utoCapti	on	ОК	Car	ncel				

Updating Caption Numbers

Caption numbers will automatically update as you insert them. For example, if Figure 1 is currently on Page 4, and you add a caption to a new illustration on Page 2, Figure 1 will become Figure 2 and the new caption will now be Figure 1.

If for some reason this does not happen, right-click the caption and click Update Field:



Activity 2-1: Adding Captions

In this activity, you will add captions to several images and diagrams in a document. Note that when we refer to a page number, we are referring to the physical location of the page, not the formatted number that appears on the page.

1. Open Microsoft 365 Word and open Activity 2-1:



- AutoSave 👓 🖫 Help Home Insert Draw Design Layout References Mailings Review View Picture Format File Comm

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 Editing Clipboard 🕠 Styles Voice Sensitivity Editor Who Discovered It? Who Ziscovered It? Prior to 1781, there were only seven known bodies in our solar system, besides the Earth. These seven were the Sun, our Moon, Mercury, Venus, Mars, Jupiter, and Saturn. These had been known since humans first began to observe the sky at night. Comets would also appear in the sky for a time, the observe the seven sev then fade away. ¢ ¹ The Babyonians believed that each of these objects was related to a different deity, and their calendar used a seven-day week. The practice of naming the seven visible objects of the solar system still continues to this day. Each of the Bigish words for the day of the week comes from an old name for a god or goddess. In English this is a mixture of both Norse and Roman gods, but in other languages the connection to the Roman names of of the planets is more apparent. ^ Galileo Galilei first turned a telescope on the sky and began to write down what he saw. Among the and began to write down what he saw. Among the things he saw were four monos orbiting Jupiter. As time passed and the telescope was improved, more objects were found. In 1655, christian Hurgens discovered the moon Titan orbiting Saturn. In 1781 Sr William Herschel discovered the planet Uranus. In 1801, Giuseppe Piazzi discovered the first asteroid. Many more asteroids were later discovered by astronomers. The discovery of the planet Neptune did not come by chance, but was found The discovery of the planet Neptune idi not come by chance, but was found using math. Astronomers had made tables of where each body should appear in the future. But Uranus did not match the predictions. So a model was made to account for the difference. This model predicted that the gravity from an unknown planet was pulling on Uranus. The model also predicted about where the mystery planet would be found. This planet was then found in 1846. For a time, a ninth planet, Pluto, was also recognized. It was found using this same method. Discovered in 1930, in 2006 scientists classified it as a dwarf planet instead. 3475 words 🔯 English (United States) (L) Focus 💷 🗐 🦉 — ÷.
- 2. Go to the fifth page of the document. Click to select the first image on the page:

3. Click References → Insert Caption:

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File Home Insert	Draw Design Layout	References N	1ailings Review View	Help Picture Format
Table of Contents Y	ab ¹ Insert Endnote Insert Footnote Show Notes	Smart Researcher Lookup	Insert Citation ~ UBibliography ~	Insert Table of Figures Insert Caption
Table of Contents	Footnotes 🕞	Research	Citations & Bibliography	Captions
				Insert Caption Label your picture or object.

Once you've added a caption, you can reference your object anywhere in your document by inserting a cross-reference.
4. The Caption dialog box will open. Let's leave the label as "Figure." In the Caption text box, type a colon and a space after the label and type ":Babylonians." Click **OK**:

Caption		?	\times
<u>Caption</u> :			
FIGURE 1: E	BABYLONIANS		
Options			
<u>L</u> abel:	Figure		\sim
Position:	Below selected item		\sim
Exclude I	abel from caption		
<u>N</u> ew Labe	el Delete Label	N <u>u</u> mber	ring
<u>A</u> utoCapti	on OK	Car	ncel

5. The caption will be inserted:





6. Now, click the second image on the page and click **References** → **Insert Caption** again:

Enter ":Galileo Galilei" as the caption text and click
 OK:

Caption			?	\times
Caption:	GALILEO	GALILEI		
Options				
<u>L</u> abel:	Figure	2		\sim
<u>P</u> osition:	Below	selected item		\sim
Exclude l	abel fr	om caption		
<u>N</u> ew Labe	el	Delete Label	N <u>u</u> mber	ing
<u>A</u> utoCaptio	on	ОК	Car	ncel

8. The caption will be inserted:



FIGURE 2: GALILEO GALILEI

9. Go to the next page of the document. Click the SmartArt diagram to select it. Click References → Insert Caption:



10. Check the "Exclude label from caption" box:

Caption			?	×
Caption: 3				
Options				
<u>L</u> abel:	Figur	e		\sim
Position:	Below	/ selected item		\sim
Exclude I	abel fr	om caption		
New Lab	el	Delete Label	N <u>u</u> mb	ering
<u>A</u> utoCapti	on	ОК	Ca	ancel
n			?	×

11. Type ":Formation process" in the Caption text
 Caption

 box and click **OK**:
 Caption

caption			
Caption:			
3: FORMAT	ION PRO	CESS	
Options			
<u>L</u> abel:	Figure		\sim
Position:	Below	selected item	\sim
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<u>N</u> ew Labe	el	Delete Label	N <u>u</u> mbering
<u>A</u> utoCapti	on	OK	Cancel

12. The final caption will now be added:



3: FORMATION PROCESS

13. Save your document as Activity 2-1 Complete. Close Microsoft 365 Word to complete this activity.

TOPIC B: Add Cross-References

The next referencing tool that we will explore is **cross-references**. Similar to hyperlinks, these links are tied specifically to document elements, such as headings, bookmarks, captioned figures, and more.

Topic Objectives

In this session, you will learn:

- What cross-references are
- How to add cross-references
- How to use the Cross-reference dialog box
- How to update cross-references

Cross-References

Cross-references help your reader navigate through a document by adding inter-document links, similar to those in a table of contents. The reader can then hold the Ctrl key and click the reference to go to that location, like this:



Adding Cross-References

To add a cross-reference, place your cursor where you want the link to appear. Then, click **References** \rightarrow **Cross-reference**:



Cross-Reference Dialog Box

With either command, you will see the Cross-reference dialog box appear:

Cross-reference			?	×
Reference <u>t</u> ype:		Insert reference to:		
Numbered item	~	Page number		\sim
🗹 Insert as <u>h</u> yperlink		Include above/below	N	
Separate numbers with				
For <u>w</u> hich numbered item:				
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From the menu at the top, choose the type of object that you want to link to. Then, choose the specific object from the list. Click **Insert** when ready:

Cross-reference			?	\times
Reference <u>t</u> ype:		Insert reference to:		
	~	Entire caption		\sim
Insert as <u>hyperlink</u>		Include above/belo	w	
Separate numbers with				
For which caption:				
Figure 1: Yearly Sales Project	tions			~
				\sim
		Insert .	Car	ncel
		insert	Cal	icer

The link will be added:

Sales Overview	
Sales in the East region were the most consistent. See	Figure 1: Yearly Sales Projections for more
information. The highest sales were in the West region	n in the first quarter.

The Cross-reference dialog box will remain open. If you are finished with it, click **Close** to return to your document.

Shading Cross-References

To help you identify them, by default cross-references appear shaded when selected. You can modify this option in the Advanced category of the Word Options dialog box:

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Save	<u>Properties follow chart data point ()</u>		
Language	Show document content		
Ease of Access	Show background colors and images in Print Layout view		<u>п</u>
Advanced	Show gettighted within the document window		
Customize Ribbon	Show <u>picture placeholders</u>		
Quick Access Toolbar	Show drawings and text boxes on screen		
Add-ins	Show text boundaries		
Trust Center	Show c <u>r</u> op marks		
	Show field codes instead of their values		
	Field shading: When selected Use graft for Never Namg: Ce Always Size: 10 When selected Eont Substitution Expand all headings when opening a document ①		
	Display		
	Show this number of Recent Documents: 50 \$0 Quickly access this number of Recent Documents: 4 \$ Show this number of unpinned Recent Folders: 50 \$		
	Show measurements in units of:		-
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Updating Cross-References

If you change the original reference (for example, a chart's caption) you must update the reference as well. To do this, right-click the cross-reference and click **Update Field**:



Activity 2-2: Adding Cross-References

In this activity, you will add cross-references in the solar system document to create a glossary. Note that when we refer to a page number, we are referring to the physical location of the page, not the formatted number that appears on the page.

1. Open Microsoft 365 Word and open Activity 2-2:



2. Go to the second-last page of the document. Click to place your cursor at the first bullet point:

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3. Next, click **References** → **Cross-reference**:

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Table of Contents	Footnotes	Research	Citations & Bibliography	Captions

4. The Cross-reference dialog box will open. Click the "Reference type" menu at the top and click **Heading**:

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Reference <u>t</u> ype:		Insert reference to:
Heading	\sim	Heading text 🗸
Numbered item	^	Include above/below
Heading Bookmark Footnote		
Endnote	5	
What is the Solar System? Who Discovered It? How Was It Formed? What Will Happen To It? The Sun What Happens Inside The Sun? What are Sunspots? What Is the Solar Atmosphere Like? Prominences and Solar Flares Chromosphere Corona		~
		<u>I</u> nsert Cancel

5. Click the word "Corona" and click Insert:

Cross-reference	?	\times
Reference <u>t</u> ype:	Insert reference to:	
Heading	 Heading text 	\sim
✓ Insert as <u>hyperlink</u>	Include above/below	
Separate numbers with		
For <u>w</u> hich heading:		
Solar System What is the Solar System? Who Discovered It? How Was It Formed? What Will Happen To It? The Sun What Happens Inside The Sun? What are Sunspots? What Is the Solar Atmosphere Like? Prominences and Solar Flares Chromosphere Corona		~
	Insert	Close

6. Leave the Cross-reference dialog box open. Click back inside the document at the end of the cross-reference. Press **Enter** to create a new bullet:

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Glossary		
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	Cross-reference ? ×	
-	Reference type: Insert reference to:	
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N	Insert as hyperlink Include above/below	
	Separate numbers with	
-	For which heading:	
	What is the Solar System?	
m	Who Discovered It? How Was It Formed?	
	What Will Happen To It? The Sun	
	What Happens Inside The Sun?	
	What is the Solar Atmosphere Like?	
	Chromosphere	
	Corona	
	<u>Insert</u> Close	

(If the Cross-reference dialog box disappears, just click References \rightarrow Cross-reference again.)

7. In the Cross-reference dialog box, scroll down in the list of headings. Click the heading "Heliopause" and click **Insert**:

Cross-reference		?	Х
Reference <u>t</u> ype:	Insert reference to:		
Heading ~	Heading text		\sim
✓ Insert as <u>hyperlink</u>	Include above/below	1	
Separate numbers with			
For <u>w</u> hich heading:			
The Sun What Happens Inside The Sun? What are Sunspots? What Is the Solar Atmosphere Like? Prominences and Solar Flares Chromosphere Corona Solar Wind Zodiacal Light			^
Heliopause What is Solar Weather?			
How the Solar System Was Born			~
	Insert	Close	2

8. Add another new line to the glossary. Now, choose **Figure** as the reference type:

	Cross-reference	?
	Reference type:	Insert reference to:
Glossary	Figure	Entire caption
> Corona	Insert as <u>hyperlink</u>	Include above/below
Heliopause	Separate numbers with	
>	For which caption:	al
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	Figure 1: Babyionians Figure 2: Galileo Galilei	
		Incart

9. Select Figure 2. Click the "Insert reference to" menu and click "Only caption text:"



10. Click Insert to add the cross-reference:

Cross-reference		?	\times
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Figure	 Only caption text 		\sim
✓ Insert as <u>hyperlink</u>	Include above/belo	w	
Separate numbers with			
For which caption:			
3: Formation process Figure 1: Babylonians			^
Figure 2: Galileo Galilei			
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11. Click **Close** or click the **X** to close the Cross-reference dialog box:

Cross-reference				?	E	Х
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3: Formation process Figure 1: Babylonians						\sim
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12. Hold the Ctrl key and click the word "Corona" in the glossary:

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Table of Contents	Footnotes 🕼 Research Citations & Bibliography Captions	Index	Table of Authorities
L.	1	<u></u>	
	volcano. Each of these is called a prominence. There have been several kinds of prominences, but all		
	of them are very large. Ones you can see are nundreus of knometers long, and the largest was almost 400,000 kilometers. That is almost twice as far as the moon is from the Earth. These prominences an	-L	
4 1	related to sunspots, because they are often seen as coming from a sunspot. The largest of these	e	
	prominences sometimes become so large that they leave the sun entirely, and that is when they		
-	become a solar flare.		
	Chromeenhere		
•	When early astronomers viewed the sun during an eclipse, they noticed that there was a brief flash		
	of light immediately before and after the eclipse. Instead of being a steady white light, it seemed to		
	be a rainbow spectrum of all of the colors you can see, which is what gives the chromosphere its		
	name. It is not as bright as the photosphere, which is why you normally don't see it during the day,		
ب	but only during an eclipse.		
	Corona		
	Even fainter than the photosphere or chromosphere is the corona. This is a region extending from		
	the chromosphere and gradually becoming a part of the solar wind throughout the rest of the solar		
~	system. The reason why the corona glows is because the gases in the corona are actually hotter than	1	
	the surface of the Sun! The reason why this happens is still a mystery to scientists, but there are		
1	several theories for what is happening. The corona will shift and change, sometimes very rapidly over	2r	
	minutes or hours, due to changes from the sun itself. Because the photosphere is so bright, it is		
	difficult to observe the corona except during an eclipse even with advanced scientific instruments.		
•	Some telescopes in space are making it easier to observe the corona, but it is still something that		
	scientists are trying to understand.		
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Page 10 of 16 3484 words	と English (United States) E@ (文 Accessionity: Investigate し, Focus	EE E0	+ 100%

13. You will be taken to the appropriate page:

14. Save your document as Activity 2-2 Complete. Close Microsoft 365 Word to complete this activity.

TOPIC C: Add Bookmarks

When reading books, you may have placed notes to mark items you want to come back to. Word has a similar feature, allowing you to bookmark places in your document that can be easily visited at a later time. In this topic, you will learn all about creating and managing bookmarks.

Topic Objectives

In this session, you will learn:

- About bookmarks
- How to insert bookmarks
- How to use the Bookmark dialog box
- How to view bookmark formatting marks
- About hidden bookmarks

Microsoft 365 Word: Part 3

Bookmarks

In Microsoft Word, a **bookmark** is a hidden indicator used to mark key points in a document. They can be used to:

- Mark points to be inserted as cross-references
- Facilitate navigation with the Go To dialog box
- Identify text for macros and other automated operations

Adding Bookmarks

To insert a bookmark in your document, first click the location where you want the bookmark to appear or select the appropriate data. (Here we have selected Sales Report.) Then, click Insert \rightarrow Bookmark:



Bookmark Dialog Box

Once you click the Bookmark command, the Bookmark dialog box will open. Type a name for the bookmark and click **Add**:

The bookmark will then be added to the document.

Bookmark		?	×
Bookmark name:			
Sales_Report		Į.	dd N
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		G	о То
	~		
Sort by:			
○ <u>L</u> ocation			
Hidden bookmarks			
		Ca	ancel

Bookmark Formatting Marks

By default, the formatting marks for bookmarks are not shown. To show these marks, open the Word Options dialog box by clicking **File** \rightarrow **Options**:



Next, click the Advanced category and scroll to the "Show document content" section. Check "Show bookmarks" and click OK:

Word Options		?	\times
General	Show document content		
Display	Show background colors and images in Print Layout view		
Proofing	Show text wrapped within the document window		
Save	Show <u>p</u> icture placeholders ①		
Language	Show drawings and text boxes on screen		
Ease of Access	Show text boundaries		
Advanced	Show crop marks		
Customize Ribbon	Show field codes instead of their values		
Quick Access Toolbar	Field shading: When selected		
Add-ins	Name: Courier New Vews		
Trust Center	Size: 10 Epont Substitution Expand all headings when opening a document ①		
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	✓ Show shortcut keys in ScreenTips		
	✓ Show horizontal scroll bar		
	✓ Show vertical scroll bar		Ŧ
	ок	Car	ncel

Now, bookmarks will be indicated by square brackets in all documents until the feature is turned off:



Figure 1: Sales Projections

Hidden Bookmarks

In addition to standard bookmarks, other bookmarks may be created for fields, Visual Basic programming, or other advanced operations. By default, these bookmarks are not shown, but you can view them by opening the Bookmark dialog box (using the **Insert → Bookmark** command) and checking "**Hidden bookmarks**:"

These bookmarks can be re-hidden at any time by unchecking this box.

Bookmark		7	×
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○ Location			
Hidden bookmarks			
3			
		Car	ncel

Activity 2-3: Adding Bookmarks

In this activity, you will review the bookmarks in the ham radio guide and add a few of your own. Note that when we refer to a page number, we are referring to the physical location of the page, not the formatted number that appears on the page.

1. Open Microsoft 365 Word and open Activity 2-3:



2. Let us see what bookmarks have been added to this document. Click Insert -> Bookmark:

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File Home	Insert	Draw	Design	Layout	Referen	ces Mail	ings	Review	View	Help		
Elank Page – Blank Page Page Break	Table	Pictures	O Shapes ~ Cons C 3D Models	∑a Sma ☐ Cha ; v ☐ Scre	artArt rt eenshot ~	Add from Files ~	⊞ G	et Add-ins ly Add-ins	W Wikipedia	Online Video	© Link → ☐ Bookmark ⊡ Cross-refuence	Comment
Pages	Tables		Illustra	ations		Content		Add-in	IS	Media	Links	Comments

3. The Bookmark dialog box will open and show a list of the current bookmarks. The Sun bookmark seems a bit out of place. Click to select it and click **Delete**:

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○ Location			
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4. Now let us check for hidden bookmarks by clicking the appropriate checkbox:

Bookmark	?	\times
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Sort by: Name		
 Location 		

5. There are lots of hidden bookmarks in this document!

Hide them again by unchecking the "Hidden bookmarks" box.

6. Let us add a few more bookmarks to this document to mark some key facts. Close the Bookmark dialog box:

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○ Location		
Hidden bookmarks		
	C	lose 🔓

Scroll to the fourth page of the document. Select the second paragraph and click Insert
 → Bookmark:

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Pager babis Illustrations Content Add-ins Media Links Content Fact Symbols A Navigation Is content Bootmarks work with hyperinks to grad any bit is specific place in your document Search document Sea	[™] Cover Page ∨ [™] Blank Page [™] Blank Page [™] Page Break [™] Cover Page ∨ [™] Cover Page Page Page Page Page Page Page Page	Add from Files v Wikipedia Online Construction of the state of the sta	Comment Page Number ∨ □ Page Number ∨
Navigation *** Search document *** Headings Pages Solar System *** What is the Solar System	Pages Tables Illustrations	Content Add-ins Media Links	Comments Header & Footer Text Symbols
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8. In the Bookmark dialog, type "Number_of_Planets" and click **Add**:

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○ Location		
Hidden bookmarks		
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9. The Bookmark dialog box will close. Go to the next page of the document and select the last three sentences of the paragraph above the "How Was It Formed?" heading. Click Insert → Bookmark:

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12. Select Bookmark from the "Go to what" list. The "Copyright_Info" bookmark should be selected by default since it is the first one in the list. Click **Go To**:

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13. You will be taken back to the first page of the document. Click **Close**:

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14. Save your document as Activity 2-3 Complete. Close Microsoft 365 Word to complete this activity.

TOPIC D: Add Hyperlinks

As we have already seen, many referencing features in Microsoft Word rely on links to help readers navigate through a document. In this lesson, we will learn about the Insert Hyperlink dialog box, which lets you manually create many different types of links.

Topic Objectives

In this session, you will learn:

- About hyperlinks
- How to add hyperlinks to a document
- How to use the Insert Hyperlink dialog box
- About the options in the Link To panel of the Hyperlink dialog box
- How to use the Edit Hyperlink dialog box

Hyperlinks

Hyperlinks are a mainstay in the computing world. They enable you to navigate around your computer, browse the internet, and jump to different locations within the same file. Word lets you use this handy feature for dividing up long documents, outlining complex projects, directing people to a web page, providing contact information, and much more.

Adding Hyperlinks

If you type a web address (such as <u>http://www.microsoft.com</u>), Word will automatically turn the text into a hyperlink. (This is a feature of AutoFormat.) To create a link manually, select the text or object that you want to add the link to and click **Insert** \rightarrow **Link**:

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Insert Hyperlink Dialog Box

When you click the Hyperlink button, the **Insert Hyperlink** dialog box will appear:

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or Web Page	Current	Lesson 1	B <u>o</u> okmark
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管 Create <u>N</u> ew Document	Re <u>c</u> ent Files		
E-mail	Addr <u>e</u> ss:	http://www.microsoft.com	
Address		ОК	Cancel

The left-hand side of the dialog box allows you to **choose the type of link (1)** that you want to create. By default, the "Existing File or Web Page" option will be selected. (It will likely be the type of link you use most often.)

With this option, you will see the settings shown above. At the top of the dialog box, you can set the **text to display (2)**. This is the text that will turn blue and will contain the actual link. (By default, any text you have selected will appear in this field, but you can modify it if you wish.)

Below this field, you can choose the **document (3)** or **website (4)** that you want to link to. You can also set up a **ScreenTip (5)** for the link.

When you are ready, click **OK** to save your changes, or click **Cancel** to discard them. Note that the OK button will not be active until both the "Text to display" and Address fields are filled in.

Options in the Link to Panel

There are four types of links that you can create, which you can see in the left-hand panel of the Insert Hyperlink dialog box:

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Let us explore the options.

Existing File or Web Page	Link to an existing file on your computer or a network. Can also like to an internet website.
Place in This Document	Link to another place in the current document, like the index or table of contents.
Create New Document	Link to a new document and set that document's options.
E-Mail Address	Also called a "mail to" link. When you click this type of link, a new email message will open up in your email program. The information for the recipient(s) will already be filled out.

Microsoft 365 Word: Part 3

Edit Hyperlink Dialog Box

After you have inserted a hyperlink, the easiest way to edit it is using the right-click menu:

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Let us take a look at this context menu and each of its options:

Edit Hyperlink	Opens the Edit Hyperlink dialog box so you can make changes to your link.
Open Hyperlink	Opens (follows) the link.
Copy Hyperlink	Copies the hyperlink to the clipboard.
Remove Hyperlink	Removes the link from the text, but does not remove the text itself.

The Edit Hyperlink dialog box is almost identical to the Insert Hyperlink dialog box, and works in the same way as discussed previously:

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Pl <u>a</u> ce in This Document	<u>B</u> rowsed Pages	Lesson 5 Lesson 6	
Create <u>N</u> ew Document	Re <u>c</u> ent Files		
E-mail	Addr <u>e</u> ss:	http://www.microsoft.com	<u>R</u> emove Link
Address		ОК	Cancel

There is also a **Remove Link** button just above the OK and Cancel buttons that allows you to remove the link from the text, just like the Remove Hyperlink command in the right-click menu.

Activity 2-4: Adding Hyperlinks

In this activity, you will view, create, and modify hyperlinks in a document. Note that when we refer to a page number, we are referring to the physical location of the page, not the formatted number that appears on the page.

1. Open Microsoft 365 Word and open Activity 2-4:



2. Let us add a hyperlink to the Wikijunior page. Select this word on the first page of the document and click Insert → Link:

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			Copyright inform Permission is grai Free Documentat Foundation; with This is a project o science and natu Wikibooks, and y This document is	Inted to copy, distribut tion License, Version 1 no Invariant Sections, of Wikijumior, a collecti re. Many people have ou are encouraged to reproduced under the	e, and/or m .2 or any lat .no Front-C on of free b been involv help partici e conditions	odify this document t ter version published I oover Texts, and no Baa ooks written especial ed with writing this b pate with writing and of the <u>GNU Free Licer</u>	under the term by the Free Sol ck-Cover. by for kids to le book. This proje editing these to 150.	s of the GNU 'tware arn about ct is hosted on oooks.

3. The Insert Hyperlink dialog box will open. Ensure that the correct text ("Wikijunior") is displayed in the field at the top of the dialog box. Type

"http://en.wikibooks.org/wiki/Wikijunior" in the Address field (without the quotation marks). Click **OK**:

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or Web Page	Current	Activity 2-1			B <u>o</u> okma	ark
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4. The hyperlink will now be created:

Copyright Information
Permission is granted to copy, distribute, and/or modify this document under the terms of the GNU
Free Documentation License, Version 1.2 or any later version published by the Free Software
Foundation; with no Invariant Sections, no Front-Cover Texts, and no Back-Cover.
This is a project of Wikijunior, a collection of free books written especially for kids to learn about
science and nature. Many people have been involved with writing this book. This project is hosted or
Wikibooks, and you are encouraged to help participate with writing and editing these books.
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- - - - - - - - - -	Copyright Information Permission is granted to copy, distribute, and/or modify this document u Free Documentation License, Version 1.2 or any later version published b Foundation; with no Invariant Sections, no Front-Cover Texts, and no Bac This is a project of <u>Wikiumior</u> , a collection of free books written especially science and nature. Many people have been involved with writting this bo				A ,∍ ,∞	Eont Paragraph Smart Lookup Synonyms Translate	>					
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5. Right-click the existing hyperlink at the end of this page. Click Edit Hyperlink:

6. The Edit Hyperlink dialog box will open. Click the **ScreenTip** button:

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Address				OK	Can	icel

The Set Hyperlink ScreenTip dialog box will open. Type the following text (without the quotation marks): "The GNU General Public License is a free, copyleft license for software and other kinds of works." Click OK:

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8. Click **OK** in the Edit Hyperlink dialog box:

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9. The ScreenTip will now be created. Move your mouse over the link to test it:

Copyright	Information
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10. Go to the next page in the document. Move your mouse over the "Solar System" heading in the Table of Contents. Notice that it is a hyperlink to a place in the current document. **Hold the Ctrl key and click this link** to navigate to that section:

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						The Sun							6	
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Let us add a hyperlink to the image on this page. Select the picture and click Insert →
 Link:



12. In the Insert Hyperlink dialog box, type "http://solarsystem.nasa.gov" (without the quotation marks) in the Address field. Click **OK**:

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E-mail	Addr <u>e</u> ss:	http://solarsystem.nasa.gov	\sim		
Address			ок (Ca	ncel

13. The hyperlink will be created:



14. Finally, go to page nine of the document. This page contains an outdated hyperlink that should be deleted. **Right-click the "Satellite Echo 1" text** and click **Remove Hyperlink**:



15. The hyperlink will immediately be removed. Save your document as Activity 2-4 Complete. Close Microsoft 365 Word to complete this activity.
TOPIC E: Insert Footnotes and Endnotes

Footnotes and endnotes are vital for many types of documents, particularly in academic papers. They can be used to tell the reader what source you used for a particular fact or quote. They can also be used to add a comment or a more detailed explanation that does not quite fit in with the text. In this topic, we will learn how to insert and manage footnotes and endnotes.

Topic Objectives

In this session, you will learn:

- About footnotes and endnotes
- How to insert footnotes and endnotes
- How to use the Footnote and Endnote dialog box
- How to navigate through footnotes and endnotes
- About ScreenTips for footnotes and endnotes

Footnotes and Endnotes

Footnotes and endnotes provide a structured way to add source information or notes to a document. With a **footnote**, a number is placed to refer the reader to a note at the end of the current page. **Endnotes** are similar, except that they refer the reader to the end of the current section or the end of the document.

Inserting Footnotes and Endnotes

To insert a footnote or an endnote, place your cursor at the point where you want the number to appear. If you want the note to appear at the bottom of the page, click the Insert Footnote command from the References tab. If you want the note to appear at the end of the document, click Insert Endnote. Both commands can be found on the References tab:

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Table of Contents	Footnotes 5	Research	Citations & Bibliography	Captions	Index
		Sales Flow			
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A number will be inserted at the cursor's location and you will be taken to the location of the note so that you can type in the information:

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File	Home	Insert	Draw	Design Layo	out References	Mailings	Review	View	Help	
Table of Contents	Add T	ïext ∽ te Table	ab ¹ Insert Footnote	ab Next Footnote	* Smart Researc	cher Insert Citation	Ti Manage Manage Style: A Bibliogr	e Sources APA ~ raphy ~	Insert Caption	es Insert Index Mark Entry
Tab	le of Conten	ts		Footnotes	Research	Citat	ons & Bibliog	graphy	Captions	Index
· · · · · · · · · · · · · · · · · · ·					Sales Flo	ess	Lead		Qualified Lead	er
					¹ Sales 101, 8	Bob Smith, Reilly	Press, 2020			

The Footnote and Endnote Dialog Box

To change the formatting of footnotes or endnotes, click the option button in the Footnotes group on the References tab:



This will open the Footnote and Endnote dialog box:

Footnote and Endno	?	×	
Location			
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		<u>C</u> onve	ert
Footnote layout			
Columns:	Match section	layout	\sim
Format			
<u>N</u> umber format:	1, 2, 3,		\sim
C <u>u</u> stom mark:		Symb	ol
<u>S</u> tart at:	1		
Nu <u>m</u> bering:	Continuous		\sim
Apply changes			
Apply changes to:	This section		\sim
<u>I</u> nsert	Cancel	Арр	ly N

Here you can change the location and format of the document's footnotes and endnotes. Also note the menu at the bottom of the dialog box that allows you to choose what section of the document to apply the changes to. Click **Apply** when you are finished changing your settings. (Notice that you can manually insert footnotes and endnotes from this dialog box, too.)

Navigating Using Reference Marks

You can navigate through footnotes and endnotes by clicking References, clicking the Next Footnote arrow, and choosing an option:

AutoSav	/e Off	89	- U -	;					
File	Home	Insert	Design		Layout	Refer	ences	Mailings	Review
Table of Contents	Add To De Updat	ext ▼ e Table	ab ¹ Insert Footnote	l[j] lı alş N alş	nsert Endno Vext Footno <u>N</u> ext Foot	ote ote tnote	j Smart kup	Researcher	Insert Citation •
Table	e of Conten	ts	F		<u>P</u> revious I	Footnote	Re	search	Citatio
					Ne <u>x</u> t Endi Pre <u>v</u> ious I	note Endnote			

You can also double-click the footnote or endnote number itself to go to that note:



ScreenTips for Footnotes and Endnotes

If you want to see the text of a particular note, place your mouse cursor over its numerical identifier. The note information will appear in a ScreenTip:

AutoSave 💽 🖫 🥠	• () - Sales	Projections 👻	♀ Search		
File Home Insert	Draw Design Layout	References Mailing	s Review View	Help	
Table of Contents ~	ab ¹ Insert Endnote Insert Footnote Show Notes	Smart Researcher Lookup	→ Manage Sources → Style: APA → tion → □ Bibliography →	Insert Table of Figures Insert DU Update Table	Mark Entry
Table of Contents	Footnotes 🕞	Research	Citations & Bibliography	Captions	Index
L	1 + + + + + + + +		2	3 • • • • • • • 4 • • • • • • • 5 •	
		Sales Flow	101, Bob Smith, Reilly Press, 2	2020 Qualified Lead	

Activity 2-5: Inserting Footnotes and Endnotes

In this activity, you will view, add, and modify footnotes. Note that when we refer to a page number, we are referring to the physical location of the page, not the formatted number that appears on the page.

1. Open Microsoft 365 Word and open Activity 2-5:



2. Go to the third page of the document. Notice that there is a number by the Solar System heading:



3. Move your mouse over this number to see the note attached to it:



4. Now let us add a few sources to the document. Go to page seven of the document. Click to place your cursor at the end of the first paragraph on this page. Click References → Insert Footnote:

AutoSave 💽 🛱 🏷	∽ ⊂ Activity 2-5 -	Saved to this PC + P Search
File Home Insert	Draw Design Layout	References Mailings Review View Help
Table of Contents	ab Insert Endnote ab Next Footnote → Footnote → Show Notes	Image: Signal Researcher Image: Sources <
L	Insert Footnote (Alt+Ctrl+F)	
	Add a note at the bottom of the page providing more info about something in your document.	
	Tell me more	What are Sunspots? Sunspots are slightly cooler areas on the surface of the sun that appear as dark areas. They only appear dark against the brightness of the rest of the surface of the sun. Despite their appearance, they are still extremely bright — brighter than an electric arc. The number of sunspots seen rises and falls over an 11 year cycle; Sunspots appear when the Sun's magnetic field is concentrated, impeding the flow of energy. A typical sunspot consists of a dark region, called the Umbra, surrounded by a lighter region, called the Penumbra. The Umbra is about 2000 °C (3600 °F) cooler than the photosphere and only looks dark in relation to its surroundings. Spots usually form in groups which are carried across the solar disk by the Sun's rotation.

5. The number will be added and you will be taken to the footnote section. Type "Definition from Oxford Dictionary, 2020" (without the quotation marks):

AutoSa	ve Off	日 り	- U -	;	Activity	2-5 -		, Р s	earch						Joh
File	Home	Insert	Draw	Design	Layout	Refere	ences	Mailings	Review	View	Help				
Table of Contents	Add ⁻ D! Upda	Text ~ ate Table	ab ¹ Insert Footnote	[i] Insert Endi 려넣 Next Footr 글 Show Note	note 👻 note 👻 es) Smart Lookup	Researcher	r Insert Citation	☐ Mana ☑ Style: ↓ □ Biblio	ge Sources APA ~ graphy ~	Insert Captio	Insert Table of Update Table	Figures	Mark Entry	Insert Index Index Index
Tabl	e of Conter	nts		Footnotes	تو ا	Res	earch	Citat	ions & Bibli	ography		Captions			Index
L · · · · · · · · · · · · · · · · · · ·					[2 Definiti	on from O	xford Diction	ary, 2020	3 .			. 5		~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~
10						. 1 8	-								

Notice how this endnote is numbered "2" since it is the second one in the document.

Let us modify the format of the footnotes in this document. Click the Footnotes and
 Endnotes option button in the Footnotes group of the References tab:



7. The Footnote and Endnote dialog box will open. Click the "Number format" menu and choose uppercase Roman numerals:

Footnote and Endno	ote	?	×
Location			
<u> Footnotes:</u>	Bottom of page		\sim
O Endnotes:	End of documer	nt	\sim
		<u>C</u> onver	t
Footnote layout			
C <u>o</u> lumns:	Match section la	yout	\sim
Format			
<u>N</u> umber format:	1, 2, 3,		\sim
C <u>u</u> stom mark:	1, 2, 3, a. b. c		\sim
<u>S</u> tart at:	A, B, C,		
Nu <u>m</u> bering:	l, ll, lll, * + ± δ	2	
Apply changes		3	
Apply changes to:	This section		\sim
Insert	Cancel	<u>A</u> pply	/

8. Click the "Apply changes to" menu and click "Whole document:"

Footnote and Endno	ote	?	×
Location			
<u> </u>	Bottom of pag	je	\sim
O Endnotes:	End of docum	ent	\sim
		<u>C</u> onve	ert
Footnote layout			
C <u>o</u> lumns:	Match section	layout	\sim
Format			
<u>N</u> umber format:	I, II, III,		\sim
C <u>u</u> stom mark:		Symb	ol
<u>S</u> tart at:	I 📫		
Nu <u>m</u> bering:	Continuous		\sim
Apply changes			
Apply changes to:	This section		\sim
	This section	4	
<u>I</u> nsert	whole docum	ent	v

9. Click Apply:

Footnote and Endno	ote	?	×		
Location					
<u> F</u> ootnotes:	Bottom of pag	Bottom of page			
O Endnotes:	End of docum	ent	\sim		
		Conv	ert		
Footnote layout					
C <u>o</u> lumns:	Match section	layout	\sim		
Format					
<u>N</u> umber format:	I, II, III,		\sim		
C <u>u</u> stom mark:		Symb	ol		
<u>S</u> tart at:	I ≑				
Nu <u>m</u> bering:	Continuous		\sim		
Apply changes					
Apply changes to:	Whole docum	ent	\sim		
<u>I</u> nsert	Cancel	<u>A</u> pp	vly		

10. The Footnote and Endnote dialog box will close. You will see the formatting of the second footnote change:

Definition from Oxford Dictionary, 2020

 Let us make sure that the changes were applied to the first footnote, too. On the References tab, click the Next Footnote drop-down arrow and click Previous Footnote:



12. You will see that the first footnote has been updated too:

¹ The name of our system comes from the old Latin word for the Sun: Sol. Because the Sun is the largest
object in the system and all the other bodies orbit around it, it became known as the solar system.

(You may need to move the cursor to see the numbering.)

13. Save your document as Activity 2-5 Complete. Close Microsoft 365 Word to complete this activity.

TOPIC F: Add Citations

This topic will focus on **citations** (references to an outside source) that are placed directly in the document. In particular, we will focus on the Source Manager and its related dialog boxes.

Topic Objectives

In this session, you will learn:

- About sources and citations
- How to use the Source Manager
- How to use the Create Source and Edit Source dialog boxes
- How to add, edit, and update citations
- How to change the citation and bibliography style

Sources

The term **source** refers to any resource you use in creating a document. This can include materials such as websites, books, journals, reports, interviews, etc.

The Source Manager Dialog Box

Microsoft Word provides a central tool to manage all sources in a document. This master source list is shared throughout all documents, making future citations and bibliographies easy to create.

To open the Source Manager, click **References** → **Manage Sources**:



The Source Manager dialog box will open:

4 Sort by Author		
		\sim
C <u>u</u> rrent List		
Copy ->		^
Delete		
Edit	2	
<u>N</u> ew		
5		~
 cited source placeholder source 		
		^
		-
	Copy -> Delete Edit New 5 Cited source Placeholder source	Copy -> Delete Edit New 5 · cited source ? placeholder source Clo

Let us go over the parts of the dialog box.

- The main areas of this dialog box show the **sources in the master list (1)** and the **current document (2)**.
- You can see a **preview** of the selected source at the bottom of the dialog box (3). Notice that the current style in use is also displayed here.
- You can **sort** and **search** the displayed lists using the controls at the top of the dialog box (4).
- The buttons in the middle of the dialog box (5) allow you to copy sources from the master list to the current document, as well as edit, delete, and create sources.
- If you have another source list in XML format, you can load it using the **Browse button (6)**.

Once you are done with the Source Manager, click Close to return to your document.

The Create Source Dialog Box

To add a new source to your document, click References \rightarrow Manage Sources:

AutoSave 💽 🖁	- U -			
File Home Insert	Design Layout Ref	erences Mailings	Review View Deve	loper Help 🔎
Table of Contents *	ab ¹ Insert Endnote Insert Footnote Show Notes	Smart Researcher Lookup	Insert Citation + U Bibliography +	Insert Difference Caption
Table of Contents	Footnotes	Research	Citations & Bibliography	Captio
			Manage Sources Organize the sour document. You can edit and is search for new sou how your citation your document.	ces cited in your remove sources, urces, and preview s will appear in

Then, in the Source Manager, click **New**:

ource Manager		?	×
Search:	Sort by Author		~
Sou <u>r</u> ces available in: Master List	Browse Current List		
C	Copy -> Delete Edit <u>New</u>		~
	✓ cited source ? placeholder source		1
eview (APA):			
			ľ
		Clo	ose

The Create Source dialog box will open:

Create Source					?	×
Type of <u>S</u> ourc Bibliography Fields for APA	Book	~	<u>L</u> anguage	Default		~
Author					Edit	
[Corporate Author					
Title						
Year						
City						
Publisher						
Show <u>All</u> Bibliography Fields						
<u>T</u> ag name Placeholder1			C	OK	Cano	el

Here, you can enter all of the information about the source that you are using. By default, the "Type of Source" menu shows Book, but you can choose from a variety of sources, each with their own set of reference fields:

Create Source					?	×
Type of <u>S</u> ourd Bibliography Fields for APA Author Title Year City Publisher	e Book Book Section Journal Article Article in a Periodical Conference Proceedings Report	× •	Language	Default	Edit	
Show <u>A</u> ll Bibliography Fields Iag name Placeholder1			E	ОК	Cano	:el

Note that as you fill in fields, Word will give you help as to the type and format of information that you should add in order to remain consistent with the current bibliographic style:

Create Source		? ×
Type of <u>S</u> our	e Book 🗸 Language Defa	ult ~
Bibliography Fields for APA		
Author	Godin, Seth	Edit
	Corporate Author	
Title		
Year		
City		
Publisher		
Show <u>All Bibliography Fields</u>		
Tag name Example: God	Kramer, James D; Chen, Jacky Oł	Cancel

Once you are done entering information, click **OK** to complete the source.

The Edit Source Dialog Box

To modify sources in your document, click **References** → **Manage Sources**:

AutoSav	ve Off	日 り	- ں -	,				<i>y</i>) Search	
File	Home	Insert	Draw	Design	Layout	Refere	ences	Mailings	Review	View
Table of Contents	Add Te 🗎 [] Dpdate	ext ∽ ≥ Table	ab ¹ Insert Footnote	[[i] Insert End ab¦ Next Foo ☐ Show No	dnote tnote ~ tes	Ú Smart F Lookup	Researche	r Insert Citation ~	🕞 Manag 🌈 Style:	ge Sources APA graphy ~
Tabl	e of Contents	s		Footnotes	E.	Rese	earch	Citatio	ons & Biblio	graphy

Then, in the Source Manager, click the entry that you want to modify and click Edit:

Source Manager	?	×
Search: Sort by Author		\sim
Sources available in: <u>B</u> rowse Master List C <u>u</u> rrent List		
Godin, Seth; Permission Marketing (1999)		^
✓ cited source		· ·
? placeholder source		
Preview (APA):		
Citation: (Godin, 1999)		^
Bibliography Entry:		
douin, S. (1999). Permission Marketing, New Tork City. Simon & Schuster.		~
	Cl	ose

The **Edit Source** dialog box will open. Make your changes and click **OK** to save them:

Edit Source					?	×
Type of <u>S</u> our	ce Book	\sim	<u>L</u> anguage	Default		\sim
Bibliography Fields for APA						
Author	Godin, Seth				Edit	
	Corporate Author					
Title	Permission Marketing	(2nd Edition)				
Year	2012					
City	New York City					
Publisher	Simon & Schuster					
Show <u>All Bibliography Fields</u>						
Tag name The Tag M God99	lame will be used to un	iquely identify this source.		ок	Cano	el

Click **Yes** to update all lists with the change:

Microsoft Word	×
This source exists in your master list and current document. Do you want to update both lists	with these changes?
Yes No Cancel	

The source will now be updated:

Source Manager	?	×
Search:	Sort by Author	\sim
Sources available in: Browse Master List	Current List	
Godin, Seth; Permission Marketing (2nd Edition) (2012)	Godin. Seth; Permission Marketing (2nd Edition) (2012)	~
Preview (APA):	· placeholder source	
Citation: (Godin, 2012) Bibliography Entry: Godin, S. (2012). <i>Permission Marketing (2nd Edition)</i> . New York City: Simon & Sc	huster.	^ ~
	Close	

Citations

A **citation** places a brief explanation of source text that is used in a document, with more information contained in the bibliography. Citations are often used for indirect quotes or statistics.

Adding Citations

Literary Citations

To add a literary citation, ensure that the source has been added in the Source Manager. Then, click to place your cursor at the location of the citation in your document. Click **References** \rightarrow **Insert Citation** and choose the citation to add:



The citation will be inserted using the currently selected style:



Citation Placeholders

You can also add a citation placeholder from the Insert Citation menu:

AutoSave 💽 🛱 🦌	· ℃ -	Sales Report 👻	✓ Search
File Home Insert	Draw Design La	yout References	Mailings Review View (
Table of Contents ~	ab ¹ Insert Endnote Insert Footnote Show Notes	s v Smart Researche Lookup	er Citation ~ Gibbiography ~
Table of Contents	Footnotes	Research الآ	Godin, Seth Permission Marketing (2nd Edition), (2012)
			山 Add New <u>S</u> ource
			Add New Placeholder

You will then be prompted to enter the name of the placeholder. Click **OK** when you are finished:

Placeholder Name	?	×
Type the tag name of the source. information to this source later b the Source Manager.	You can a y clicking	add more Edit in
Placeholder1		
ОК		lancel

- 1		 	
	Source Manager		?
	<u>S</u> earch:	Sort by Author	

This placeholder will now be included in the **Source Manager** and in the document:

Search:			Sort by Author	\sim
Sou <u>r</u> ces Master Li	available in: <u>B</u> rowse		CurrentList	
God	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	<u>C</u> opy ->	? Placeholder1	^
		<u>D</u> elete	· · · · · · · · · · · · · · · · · · ·	
		<u>E</u> dit		
		<u>N</u> ew		
			✓ cited source	×
			? placeholder source	
Preview (Al	PA):			
Citation:	(God)			^
Bibliogra	aphy Entry:			1
(n.d.).	priy 2001 y.			
				¥
			Close	

You can update it at any time in the Source Manager. Then, all related placeholders will be updated.

Legal Citations

To create a legal citation, select the long citation in the document. Then, click **References** \rightarrow **Mark Citation**:



 \times

The Mark Citation dialog box will open. Make the necessary changes to the "Selected text" and "Short citation" boxes, and make sure that you have the proper category selected from the Category menu. Then, click **Mark**:

Mark Citat	ion		?	×
Selected te	xt:			
Myers vs.	Acme Foods, 291 U.S. 204,695	^	<u>N</u> ext C	itation
(2020)		\checkmark	Ma	ark N
Category:	Cases	\sim	Mar	k <u>A</u> ll
<u>S</u> hort citati	on:			_
Myers vs. A	Acme Foods, 291 U.S. 204,695 (2020)		Categ	lory
Myers vs. / R.C. 4511.	Acme Foods, 291 U.S. 204,695 (2020)	^		
Smith vs. N	Main Widgets, 291 U.S. 101,352 (2010)	~		
Long citati	on:			
Myers vs.	Acme Foods, 291 U.S. 204,695 (2020))	Car	ncel

You can then close the dialog box or mark more citations.

The Edit Citation Dialog Box

If you later want to modify a literary citation, click to place your cursor inside the citation. Then, click the drop-down arrow on the right-hand side of its container and click **Edit Citation**:



Then, set your options in the Edit Citation dialog box and click **OK**:

The citation will now be updated:

Godin, 2012, pp. 90-94) 🖕

Edit Citation	?	×
Add <u>P</u> ages:	90-94	
Suppress	<u>Y</u> ear	
ОК	Ca	ncel

Citation and Bibliography Styles

By default, Word uses the APA style for the document's sources and bibliography. To change this style, click **References** \rightarrow **Style** and choose the desired style to use:

AutoSave 💽 🛱 🧳	s ت ح	ales Report 👻	♀ Search	
File Home Insert	Draw Design Lay	out References	Mailings Review	View Developer Help
Table of Contents ~	ab ¹ Insert Footnote Show Notes	* Smart Research	er Linsert Citation ~ 🛄 Bibliog	APA
Table of Contents	Footnotes	ि Research	Citations & Biblic	Sixth Edition Chicago Sixteenth Edition
				GB7714 2005
				GOST - Name Sort 2003
				GOST - Title Sort 2003
				Harvard - Anglia 2008
				IEEE 2006
				ISO 690 - First Element and Date 1987
				ISO 690 - Numerical Reference 1987
				MLA Seventh Edition
				SIST02 2003
				Turabian Sixth Edition

After clicking on one of the options in this menu, Word will update all sources in the document to match that style. It will also create all future references in that style.

Activity 2-6: Adding Citations and a Bibliography

In this activity, you will add sources and citations to the solar system document. Note that when we refer to a page number, we are referring to the physical location of the page, not the formatted number that appears on the page.

1. Open Microsoft 365 Word and open Activity 2-6:



2. First, let us add our sources to the document. Click **References** → **Manage Sources**:



3. The Source Manager will open. Click New:

Source Manager	?	×
Search: Sort by Author		~
Sources available in: Browse Current List		
Copy-> Delete Edit Vew V		< >
✓ cited source ? placeholder source		
Preview (APA):		
		< >
	Clo	ose

4. Ensure that "Book" is selected as the type of source. Enter the information shown below and click **OK**:

Create Source		?	×
Type of <u>S</u> our	ce Book V Language Default	i.	~
Bibliography Fields for Chicago			
Author	Geisel, Theodore		Edit
	Corporate Author		
Title	There's No Place Like space!		
Year	1999		
City	Toronto		
Publisher	Random House		
Show <u>All</u> Bibliography Fields			
Tag name Example: Gei99	Adventure Works Press OK	-C	Cancel

5. You will be returned to the Source Manager and the source will be saved. Let us create another source by clicking **New**:

Source Manager		?	×
Search: Sort by Author			~
Sources available in: Browse Current List			
Giesel, Theodore; There's No Place Like Spacel (1999) Giesel, Theodore; There's No Place Like Spacel (199 Giesel, Theodore;	9)		~
 cited source placeholder source 			
Preview (Chicago):			
Citation: (Giesel 1999)			1
Bibliography Entry: Glesel, Theodore. 1999. There's No Place Like Space! Toronto: Random House.			
		Clo	se

6. This source is also a book. Enter the information shown below and click **OK**:

Create Source					?	\times
Type of <u>S</u> our	ce Book	~	<u>L</u> anguage	Default		~
Bibliography Fields for Chicago						
Author	Bennett, Jeffrey				Edit	
	Corporate Author					
Title	The Cosmic Perspective					
Year	2013					
City	New York					
Publisher	Addison-Wesley					
Show All Bibliography Fields						
Tag name Example: Ben13	Adventure Works Press			ок	Cano	:el



7. We have one more source to add, so click **New** again:

8. This time, we are adding a website, so choose that source type from the menu at the top of the dialog box:

Create Source					?	×
Type of <u>S</u> ourc Bibliography Fields for Chicago	web site Book Section	~ ~	<u>L</u> anguage	Default		~
Author	Article in a Periodical Conference Proceedings Report				Edit	
Name of Web Page	Web site	3				
Year			 			
Month						
Day						
Year Accessed						
Month Accessed						
Day Accessed						
URL						
Show <u>All Bibliography Fields</u>						
Tag name Placeholder1			E	OK	Canc	el

9. Enter the information shown below and click **OK**:

Create Source						?	×
Type of <u>S</u> our	ce Web site	\sim		<u>L</u> anguage	Default		\sim
Bibliography Fields for Chicago	b						
Author						Edit	
	Corporate Author	National Aero	nautics and Space A	dministration	1		
Name of Web Page	The Solar System						
Year	2020						
Month	01						
Day	01						
Year Accessed							
Month Accessed							
Day Accessed							
URL	http://solarsystem.nas	a.gov					
Show <u>All Bibliography Fields</u>							
Tag name Example: Nat20	http://www.adatum.co	m			ок	Cano	el

10. All sources should now be in the master list and the current list. Click **Close** in the Source Manager:

ource Manager	?	×
Search:	Sort by Author	~
Sources available in: Browse Master List God Instrume LAteronautices and Space Administration: The Solar System (2020) Geisel, Theodore; There's No Place Like space! (1999)	Current List Depy -> National Aeronautics and Space Administration; The Solar Syste Bennett, Jeffrey; The Cosmic Perspective (2013) Gelsel, Theodore; There's No Place Like space! (1999) idit idit	m (202 🔨
	 cited source placeholder source 	
review (Chicago):		
Citation: (National Aeronautics and Space Administration 2020)		^
Sibliography Entry: National Aeronautics and Space Administration. 2020. <i>The Solar Syste</i>	01 01. http://solarsystem.nasa.gov.	
		Close

11. Go to page 10 in the document. Click to place your cursor at the end of the Heliopause paragraph:

AutoSave 💽 🛱 🖇	a ⊽	ctivity 2-6 👻	♀ Search		l	
File Home Insert	Draw Design Layou	References N	Aailings Review View	Help		
Table of Contents ~	ab ¹ [1] Insert Endnote Insert Footnote Show Notes	Smart Researcher Lookup	Insert Citation ~ D Bibliography ~	Insert Table of Figures	Mark Entry	Mark Citation
Table of Contents	Footnotes	Research	Citations & Bibliography	Captions	Index	
L	1	1 + + + 🛛 + + + + + + + + + + + + + + +	1	3	5 * * * 1 * * * 2 * * * 1	7 .
		the sun over	millions of years.			
		Helieneure				
		The Uplause	: 	a daha a dan afaha a dan matan Thia	to use and the	
N		The Heliopat	use is what can largely be consider	ed the edge of the solar system. This	is where the	
		solar wind sl	ows down and stops (or "pauses")	due to the "solar wind" coming from	n other stars in	
		the galaxy. T	here is a region just inside the heli	iopause where the solar wind slows o	iown from	
-		supersonic s	peeds (literally, faster than sound)	to subsonic speeds.		
			,			

12. Click **References** → **Insert Citation** and choose the first resource in the menu ("The Cosmic Perspective"):

AutoSave 💽 🛱 🖇	- 0 -	Activity 2-6 👻		
File Home Insert	Draw Design Layo	ut References Ma	ailings Review View Help	
Table of Contents ~	ab ¹ Insert Endnote Insert Footnote Show Notes	Smart Researcher Lookup	Insert Citation ~ Diblography ~	Insert Table of Figures Update Table Opdate Table Opdate Table
Table of Contents	Footnotes	Research	Bennett, Jeffrey The Cosmic Perspective, (2013)	·····
-		Heliopause The Heliopaus	Geisel, Theodore There's No Place Like space!, (1999)	ar system. This
~ · ·		solar wind slo the galaxy. Th	National Aeronautics and Space Adm The Solar System, (2020)	inistration 1" coming from ar wind slows c
m		supersone sp	^t ☐ Add New <u>S</u> ource ⁽⁻⁾ ? Add New <u>P</u> laceholder	

13. The citation will be added:

Heliopause The Heliopause is what can largely be considered the edge of the solar system. This is where the solar wind slows down and stops (or "pauses") due to the "solar wind" coming from other stars the galaxy. There is a region just inside the heliopause where the solar wind slows down from supersonic speeds (literally, faster than sound) to subsonic speeds. (Bennett 2013)

14. Save your document as Activity 2-6 Complete. Close Microsoft 365 Word to complete this activity.

TOPIC G: Insert a Bibliography

Our final topic in this lesson will focus on bibliographies, which compile all sources into a single list that is usually included at the end of the document.

Topic Objectives

In this session, you will learn:

- About bibliographies
- How to insert and update a bibliography

Bibliographies

After you have added all of your sources, it is now time to insert the **bibliography**, which is a list of all sources in the document. Generally, the bibliography is placed at the end of the document.

Adding a Bibliography

To insert the bibliography, place your cursor wherever you want the bibliography to be located. Then, click **References** → **Bibliography**:

AutoSave 💽 🕅 灯) • [™] - Sales	Report 👻	, P si	earch
File Home Insert	Draw Design Layout	References N	Mailings I	Review View Developer Help
Table of Contents Y	ab ¹ [i] Insert Endnote Insert Footnote Show Notes	Smart Researcher Lookup	Insert Citation ~	Imanage Sources Image Sources Im
Table of Contents	Footnotes 🖓	Research	Citatio	Built-In
				Bibliography
				Bibliography Chen, J. (2003). Citations and References. New York: Contoso Press.
				Haas, J. (2005). Creating a Formal Publication. Boston: Proseware, Inc.
				Kramer, J. D. (2006). How to Write Bibliographies. Chicago: Adventure Works Press.
				References
				References Chen 1 (2003) Citations and References New York: Controls Press
				Haas, J. (2005). Creating a Formal Publication. Boston: Proseware, Inc.
				Kramer, J. D. (2006). How to Write Bibliographies. Chicago: Adventure Works Press.
				Works Cited
				Works Cited Chen. J. (2003). Citations and References. New York: Contoso Press.
				Haas, J. (2005). Creating a Formal Publication. Boston: Proseware, Inc.
				Kramer, J. D. (2006). How to Write Bibliographies. Chicago: Adventure Works Press.
				[] Insert Bibliography
				Save Selection to Bibliography Gallery

From this menu, click the style of bibliography that you want to use. You can also click the Insert Bibliography command to insert a bibliography with no heading.

The bibliography will then appear in your document:



Updating the Bibliography

Just like a table of contents, Word has the ability to update your bibliography and its citations. This comes in handy if you have altered sources or changed the style. One way to update the bibliography is to click inside of it and click "**Update Citations and Bibliography**" at the top:

	🗄 🛄 👻 📄 Update Citations and Bibliograph	У
4	Works Cited	Windate Citations and Bibliography
	Godin, S. (2012). Permission Marketin	ng (2nd Edition).

Another way to update it is to right-click on the bibliography and click **Update Field**:

🛄 👻 🛅 Update Citations and Bibliography	Calibri (Body) - 11 - A^ A 💞 🗛 -
Norks Cited	B $I \ \cup \ \swarrow \ \land \ A \ \sim \ \blacksquare \ \sim \ \blacksquare \ \sim \ \blacksquare \ \sim \ Styles$
Godin, S. (2012). Permission Marketing (2nd Edition).	
	χ Cu <u>t</u>
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	لم Edit Field
	Toggle Field Codes
	A <u>F</u> ont

You can also use the F9 shortcut key when the bibliography is selected.

Activity 2-7: Adding Citations and a Bibliography

In this activity, you will complete the solar system document by adding a bibliography. Activity 2-6 must be completed prior to completing this activity.

1. Open Microsoft 365 Word and open Activity 2-7:



2. Let us add the bibliography to the document. Go to the end of the document and make sure your cursor is on the last page. Click References → Bibliography and click the first item in the gallery:

AutoSave 💽 🗄 🏷 🗸 🗸	Activity 2-7 - Saved to this PC •	Search	Joh
File Home Insert Draw Design	Layout <u>References</u> Mailings	Review View Help	
Table of Contents	Footnote ~ Smart Researcher Insert	Style: APA Bibliography Gantino Ganti	Mark Di Update Index Mark
Table of Contents Footnotes	Research Citatio	Built-In	idex Tabl
L	1	Bibliography	· · . · · · · · · 7 ·
		Bibliography	
1		Chen, J. (2003). Citations and References. New York: Contoso Press.	
1		Haas, J. (2005). Creating a Formal Publication. Boston: Proseware, Inc.	2
		Kramer, J. D. (2006). How to Write Bibliographies. Chicago: Adventure Works Press.	Bibliography
		References	Automatic bibliography that
	I	Deferences	includes all sources associated with the document
-		Chen, J. (2003). Citations and References. New York: Contoso Press.	
		Haas, J. (2005). Creating a Formal Publication. Boston: Proseware, Inc.	
-		Kramer, J. D. (2006). How to Write Bibliographies. Chicago: Adventure Works Press.	
		Works Cited	
-			
		Works Cited Chen. J. (2003). Citations and References. New York: Contoso Press.	
·		Haas, J. (2005). Creating a Formal Publication. Boston: Proseware, Inc.	
		Kramer, J. D. (2006). How to Write Bibliographies. Chicago: Adventure Works Press.	
-		Insert Bibliography	
-		Save Selection to Piblicemaky Gallery	
		gave selection to bibliography Gallery	



3. The bibliography will be added with the sources that we created in Activity 2-6:

4. After reviewing the bibliography, you realize that the year of one of the books is wrong. Click **References** → **Manage Sources**:



5. Select the second book in the list on the left-hand side. Click Edit:

Source Manager	? ×
Search:	Sort by Author
Sources available in: Master List National Aeronautics and Space Administration; The Solar System (2020) BennetL refress The Cosmic Perspective (2013) Geisel, Theodore; There's No Place Like spacel (1999) Delete Edit New	Cyrrent List National Aeronautics and Space Administration; The Solar System (202
Preview (APA):	
Citation: (Bennett, 2013)	,
Bibliography Entry: Bennett, J. (2013). <i>The Cosmic Perspective</i> . New York: Addison-Wesley.	
	Close

6. The Edit Source dialog box will open. Change the text in the Year field to 2015 and click **OK**:

Edit Source					?	×
Type of <u>S</u> our	ce Book	\sim	<u>L</u> anguage	Default		\sim
Bibliography Fields for APA	<u>.</u>			-		
Author	Bennett, Jeffrey				Edit	
	Corporate Author					
Title	The Cosmic Perspective					
Year	2015					
City	New York					
Publisher	Addison-Wesley					
Show <u>All Bibliography Fields</u>						
Tag name Example: Ben13	2006			ок	Can	cel

7. You will be prompted to update the current document's list. Click **Yes**:

Microsoft	Word ×
	This source exists in your master list and current document. Do you want to update both lists with these changes?
	Yes No Cancel

8. Close the Source Manager dialog box:

Source Manager			?	×
Search:		Sort by Author		~
Sources available in: Browse Master List National Aeronautics and Space Administration; The Solar System (2020) Bennetl: Aeros: The Cosmic Perspective (2015) Geisel, Theodore; There's No Place Like spacel (1999)	<u>C</u> opy -> <u>D</u> elete <u>E</u> dit <u>N</u> ew	Current List National Aeronautics and Space Administration; The Solar 5 ✓ Bennet, Jeffrey, The Cosmic Perspective (2015) Geisel, Theodore; There's No Place Like Spacel (1999) ✓ cited source ✓ cited source	System (2	202 ~
Preview (APA):				
Citation: (Bennett, 2015)				^
Bibliography Entry: Bennett, J. (2015). The Cosmic Perspective. New York: Addison-We	esley.			
			Clos	se

9. Back in the document, click inside the bibliography to select it. Click "**Update Citations** and **Bibliography**" at the top of the table:



10. The year will be updated:

Bibliography Bennett, J.(2015) The Cosmic Perspective. New York: Addison-Wesley.
Geisel, T. (1999). There's No Place Like Space! Toronto: Random House.
National Aeronautics and Space Administration. (2020, 01 01). <i>The Solar System</i> . Retrieved from Solar System Exploration: http://solarsystem.nasa.gov

11. Go to page 10, where we created a citation with this source earlier. You will see that it, too, has been updated:

1 - 1	1	
10	llonause	
	nopaaoo	

The Heliopause is what can largely be considered the edge of the solar system. This is where the solar wind slows down and stops (or "pauses") due to the "solar wind" coming from other stars in the galaxy. There is a region just inside the heliopause where the solar wind slows down from supersonic speeds (literally, faster than sound) to subsonic speeds. (Bennett, 2015)

12. Save your document as Activity 2-7 Complete. Close Microsoft 365 Word to complete this activity.

Summary

In this lesson, we took an in-depth look at the various referencing tools in Microsoft 365 Word. You should now feel comfortable creating and managing captions, cross-references, hyperlinks, bookmarks, footnotes, endnotes, sources, citations, and bibliographies.

LESSON 3: SIMPLIFYING AND MANAGING LONG DOCUMENTS

Lesson Objectives

In this lesson you will learn how to:

- Add cover pages and blank pages to a document
- Insert an index
- Insert a table of contents
- Insert ancillary tables, such as tables of figures and authorities
- Manage document outlines
- Create master and subdocuments

TOPIC A: Insert Blank and Cover Pages

Microsoft Word includes many pre-designed cover pages that can help you add a professional, polished touch to any document. Microsoft Word also includes a one-click command to add a blank page anywhere in a document.

Topic Objectives

In this session, you will learn:

- How to insert blank pages
- How to insert cover pages

Inserting Blank Pages

AutoSave 💽 Off		U ~(≂ Z	oomFoods -	Saved to this
File Home	Insert	Draw	Design	Layout	Reference
 Cover Page ~ Blank Page Hage Break 	Table	Pictures	C Shapes →	≥ Sma Cha Scre	artArt rt eenshot ~
Pages	Tables		Illustra	ations	
Add a Blank Page Add a blank page anywhere in your document.			1		· [· · · ·
⑦ Tell me more					

To create a blank page, place your cursor where you want the new page to appear. Then, click Insert → Blank Page:

This will add a blank page to the document.

Inserting Cover Pages

To add a cover page to your document, click **Insert** → **Cover Page** and choose a style:



The selected cover page will be added to the beginning of your document. All you have to do is add the information in the provided fields:



Some text may automatically be inserted for you based on the document's properties. You can add any other elements you like (such as your own graphics) or change the formatting of the existing elements.

Activity 3-1: Inserting Blank and Cover Pages

In this activity, you will add a cover page and a blank page to a document.

1. Open Microsoft 365 Word and open Activity 3-1:



2. First, let us add a cover page. Click Insert → Cover Page → Retrospect:

AutoSave 💽 Off	日 り~ ひ -	Activity 3-1 - Saved to th			
File Home	Insert Draw Design	Layout Referen			
🖹 Cover Page 🗠	Shapes	∽ ➤ SmartArt			
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Retrospect	pooraenti tituj	rideline			
BOCUMENTRAL Slice (Dark)	Retrospect Large tile with contact info o accent color block	n an [tooument tife] men ViewMaster			
		-			
More Cover Pages from Office.com					
Remove Current Cover Page					
Save Selection to Cover Page Gallery					

3. Enter "Solar System" for the document title:

AutoSave 💽 🗒 🏷 - 🕐 =	Activity 3-1 • 🔎 Search	John Smith 🛛 🗖 — 🗆 🗙
File Home Insert Draw Design Layo	ut References Mailings Review View Help Shape Format	☆ Share
[™] Cover Page ~ [™] [™] Blank Page [™] Blank Page [™] Table [™] Cons	SmartArt I Get Add-ins W Get Add-ins V Wikipedia Online Construction of the state	ce Header → A → C → C → C → C → C → C → C → C → C
Pages Tables Illustrations	Content Add-ins Media Links	Comments Header & Footer Text Symbols
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e 	, Solar System	
File Home Insert Draw Design Layout References Mallings Review View Help Shape Format	×	
---	------	
Cover Page~ Table Page Table Pagee	ents	
Pages Tables Illustrations Context Add-Ins Media Links Comments Header & Footer Text Symbols		
	^	
	Ê	
I Solar System		

4. Type "A Wikibooks Project" for the subtitle:

Let us add a page for the index that we are going to create in the next activity. Press Ctrl
 + End to go to the end of the document. Click Insert → Blank Page:

AutoSave 💽 🖝	⊟ '?` `)	Ŧ	Activity 3-1 +	R	iearch					John Smith	JS I	n –		×
File Home	Insert Draw	Design	Layout Referen	ces Mailings Re	iew View	Help					ß	Share 🖓	³ Comme	ents
Cover Page ~	Table Pictures	Shapes ~ Shapes ~ Icons O 3D Models	>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	Add from Files ~ Get Ad	1-ins W J-ins Vikipedi	ia Online Video	Sink → Bookmark Cross-reference	Comment	Header ~ Footer ~	A C C	Π ~ 8 δ Ω.] ~ [Equation ~ Symbol ~		
Pages	Tables	Illustra	tions	Content	Add-ins	Media	Links	Comments	Header & Footer	Text		Symbols		^
Pages Add a Blank Page and document. (2) Tell me more	Tables	liusta	tions exp exp mit So The Sta knc I	Content anaion stretched out the rowave light. Iar System Formati solar system formed ou rs and solar systems that wm as MIG).	Vad ins	f gas and dus	t taks crowave light. Scientis: it about 4.6 billion year e now forming in the E	Comments · S · · · I ts can detect f rs ago. agle Nebula (Headra & Foder	Test		Symbols		
- - - - -			12	Page						00 PT				

 The blank page will be added. Save your document as Activity 3-1 Complete. Close Microsoft 365 Word to complete this activity.

TOPIC B: Insert an Index

An **index** is like a table of contents, except it is arranged a bit differently. Rather than listing pages in sequential order, an index lists topics, words, and/or phrases, and tells you where to find that information. This is a very useful feature when working with long documents, and you will learn all about it in this topic.

Topic Objectives

In this session, you will learn:

- How to mark index entries with the Mark Index Entry dialog box
- How to identify index entry field codes
- How to use the Index dialog box and its various options
- How to automatically mark entries with a concordance file
- How to use the Style and Modify Style dialog boxes to customize an index
- How to update an index

The Mark Index Entry Dialog Box

The first step in creating an index is to indicate what words to include in it. To start, select the text that you want to use as an index reference. Then, click **References** \rightarrow **Mark Entry**:

AutoSave 💽 🖁 🍃)~ Ù ≂ Zoomf	oods +	♀ Search		John Smith	
File Home Insert	Draw Design Layout	References Mai	lings Review View H	Help		🖻 Share 🛛 🖓 Comments
Table of Contents ~	ab ¹ Insert Endnote Insert Footnote 등 Show Notes	Smart Researcher Lookup	Insert Citation ~ U Bibliography ~	Insert Table of Figures	Mark Entry	Mark Citation
Table of Contents	Footnotes 5	Research	Citations & Bibliography	Captions	lindex	Table of Authorities
	1 · · · · · · · · · · · · · · · · · · ·		2		Mark Entry (Alt+Shift+X Add the order to the the the the the the the the test of te)
	Busine ZoomFo gourme then pu	ss Overview ods will prepare and dis meals that are sold in chase the meals and re	stribute pre-packaged, frozen, grocery stores. Consumers can heat them at home.	Our Vision To be the world leader in health high-quality, pr packaged meal solutions.	1 17, e-	

You will then see the Mark Index Entry dialog box:

Mark Index Entr	у		?	×
Index				
Main <u>e</u> ntry:	ore-pa	ckaged		
<u>S</u> ubentry:				
Options				
O <u>C</u> ross-refer	ence:	See		
Current <u>p</u> age	ge			
🔘 Page ra <u>n</u> ge				
Bookmark:				\sim
Page number fo	rmat –			
Bold				
ltalic <u>I</u> talic				
This dialog box multiple index e	stays o ntries.	pen so that yo	ou can ma	rk
<u>M</u> ark	ß	Mark <u>A</u> ll	Can	cel

Modify the text as desired in the "Main entry" field and click the **Mark** button to add the index entry. The Mark Index Entry dialog box will remain open so that you can mark other index entries. Click the **X** to close when you are finished.

Mark Index Entries Options

You can use the Options section in the Mark Index Entry dialog box to change the type of entry that is created. By default, Microsoft Word will create an entry to the current page, but you can choose another page range. Or, you can omit the page reference and refer the reader to another index entry using the Cross-reference field.

Subentries

Each index reference can contain a main entry and a subentry. For example, if a recipe book used an index, you might see an entry for Chocolate, and then subentries for Chocolate Cake, Chocolate Chip Cookies, etc.

Index Entry Field Codes

When you mark an index entry, special characters will be turned on. This allows you to easily see index entries in the document:



As you can see, index entries are marked with "XE" and specialized curly brackets. Remember, you may hide these characters at any time by clicking **Home** \rightarrow **Show/Hide**:



The Index Dialog Box

After you have marked text as index entries, it is time to insert the index. (You can create an index with hidden characters enabled or disabled; it does not matter.) Then, place your cursor at the point where you would like the index to appear (usually at the very end of the document). Click **References** \rightarrow **Insert Index**:



The Index dialog box will appear on your screen. Here, you can control every aspect of your index's appearance:

Index						?	×
Inde <u>x</u> Ta	able of Contents	Table of Fig	gures	Table of A	uthorities		
Print Pre <u>v</u> iev	v						
Aristotle,	2		^	Type:	Indented	◯ Ru <u>n</u> -ir	n l
				C <u>o</u> lumns:	2		
Asteroid	oelt. <i>See</i> Jupiter			<u>L</u> anguage:	English (Unite	d States	~
Atmosphe	ere						
Earth			~				
Bight alight	gn page number	3		4			
Forma <u>t</u> s:	From template		~	2			
				9			
				6	7	8	
			M	ar <u>k</u> Entry	A <u>u</u> toMark	Modify	y
					ОК	Car	ncel

The **top left of the dialog box (1)** shows a preview of how the index will look with the current settings. You can also choose a **pre-defined format** for the index **(2)** and then customize the **alignment (3)** and **tab leader (4)** used for page numbers. On the right-hand side of the dialog box **(5)**, you can choose the **index type**, **column format**, and **language**. The commands at the bottom of the dialog box allow you to **mark index entries** using the dialog box that we discussed at the beginning of this topic **(6)** or with a concordance file **(7)**. The **Modify command (8)** allows you to set **advanced options** for your index (which we will look at in a moment).

Once your options are set, click **OK** to create the index:

Index		
30-Day	2	Mix and Match
Business Plan	2	Pre-packaged1
Dessert	2	Single-serve2
Family	2	

The Open Index AutoMark File Dialog Box

If you have a concordance file outlining how the document should be indexed, you can automatically mark index entries by clicking the **AutoMark** command in the Index dialog box:

Index					?	×
Inde <u>x</u> Ta	able of Contents	Table of Figu	res Table of A	Authorities		
Print Preview	,					
Aristotle, 2		^	Type:	Indented	○ Ru <u>n</u> -in	
Asteroid bel	t. See Jupiter		Columns:	2		
Atmosphere			_	En aliah (Cana	-1-1	
exospi	nere 4		Language:	English (Cana	aa)	~
ionosp	here, 3					
mesos	phere, 3–4					
strato:	sphere, 3	*				
Bight alignation	gn page numbers	~]			
Forma <u>t</u> s:	From template	\sim				
			Mar <u>k</u> Entry	AutoMark		
				ОК	Can	cel

Open Index AutoMark File					X
> 👻 🛧 📙 « Desktop	> Word Files > Sample Fi	es > Concordance File	√ Č	Search Concordance File	Q
)rganize 🔻 New folder					?
📌 Quick access	^	Name		Date modified	Туре
📃 Desktop	*	🔟 Concordance File		2020-06-02 1:11 PM	Micros
🔮 Documents	*				
🖶 Downloads	*				
🗦 Dropbox	*				
o Creative Cloud Files	*				
Pictures	*				
💻 This PC	*				
Microsoft Word					
Desktop					
🗦 Dropbox					
	¥	<			>
File name:	Concordance File		~	All Word Documents	\sim
			Tools 🔻	Open Cance	el

Now, you can browse to and select the concordance file:

Once you click Open in the Open Index AutoMark File dialog box, the Index dialog box will close and the index entries in the concordance file will be marked.

The Concordance File

A **concordance file** is a special type of text document that can be used to automatically mark index entries. This file must be set up as a column with two tables, like this:

AutoSave 💽 🛱 🏷 ヤ 💍 マ Co	ncordance File 👻 🔎 Search		John Smith	JS 📼 -	- 🗆 X
File Home Insert Draw Design Lay	out References Mailings Review	View Help		🖄 Share	P Comments
$ \begin{array}{c c} & & \\ & & \\ & & \\ Paste \\ & & \\ $		AaBbCcbt AaBbCcbt AaBbCt AaBbCct AaBbCcc AaBb v	P Find → \$ C Replace Select →	Dictate	kity Editor
Clipboard 🕞 Font	Fu Paragraph Fu	Styles 5	Editing	Voice Sensiti	vity Editor 🔨
	ZoomEoods				
	Dessert	Product:Dessert			
1	Dessert	Product:Dessert			
	Gourmet	Product:Gourmet			
	gourmet	Product:Gourmet			
-	Mix and Match package	Mix and Match			
	Strategy	Strategies			

The first column **(1)** contains the text that Microsoft Word will look for when marking index entries. Each word must appear exactly in the table as it does in the document. (For example, in the sample file you can see two entries each for "dessert" and "gourmet" one that is capitalized and one that is not.)

The second column (2) contains the index entries themselves, again appearing exactly as they will in the index. Entries and subentries are separated by a colon (as indicated by the number three (3) in the image above). You can create up to eight levels of subentries in this way!

Index	
30-Day, 2	Product
Business Plan, 2	Dessert, 2
Dessert, 2	Gourmet, 1
Family, 2	Single-serve, 2
Mix and Match, 2	Strategies, 1, 2, 6
Pre-packaged, 1	ZoomFoods, 1

The Style Dialog Box

To modify the appearance of the index, click **Modify** in the Index dialog box:

Index Table of Contents Table of Figures Table of Authorities Print Preview Aristotle, 2 Asteroid belt. See Jupiter Atmosphere Earth exosphere, 4 ionosphere, 3 mesosphere, 3–4 trattorohore 2 Right align page numbers ab leader: immediate from template From template Type: Indented Right align page numbers	ndex					?	\times
Print Preview Aristotle, 2 Asteroid belt. See Jupiter Atmosphere Earth exosphere, 4 ionosphere, 3 mesosphere, 3-4 ctratorehore 2 Right align page numbers 'ab leader: 'mmats: From template Y Type: Image: Im	Inde <u>x</u>	Table of Contents	Table of Figures	Table of A	uthorities		
Aristotle, 2 Asteroid belt. See Jupiter Atmosphere Earth exosphere, 4 ionosphere, 3 mesosphere, 3–4 ctentoerbere 2 Right align page numbers Type: Indented Run-in Columns: 2 Language: English (United States) V Sormats: From template	Print Pre	view					
Asteroid belt. See Jupiter Atmosphere Earth exosphere, 4 ionosphere, 3 mesosphere, 3–4 ctratorehore 2 Right align page numbers Tab leader:	Aristotle	, 2	^	Type:	Indented	⊖ Ru <u>n</u> -ir	n
Atmosphere Earth exosphere, 4 ionosphere, 3 mesosphere, 3–4 ctratorebore 2 Right align page numbers Tab leader: From template	Asteroid	belt. See Jupiter		Columns:	2 🗘		
Earling august English (onned states) exosphere, 4 ionosphere, 3 mesosphere, 3–4 ctestorehore 2 Right align page numbers iab leader:	Atmosph	here		Language:	English (Unite	d States)	\sim
ionosphere, 3 mesosphere, 3–4 ctratorabora 2 <u>Right align page numbers</u> <u>ab leader:</u> <u>rime</u> From template	ex	osphere 4		20			
mesosphere, 3–4 <u>Right align page numbers</u> ab leader:	ior	iosphere, 3					
Right align page numbers ab leader: ······· ··ormats:	me	esosphere, 3–4					
Right align page numbers 'ab leader: \vdots 'ormats: From template	-+-	atorohoro 2	•				
iab leader: Formats: From template	Diabt	align page numbers					
Formats: From template		angri page numbers					
Forma <u>t</u> s: From template	ab lead	er:	<u> </u>				
	Forma <u>t</u> s:	From template	\sim				
			N	lar <u>k</u> Entry	A <u>u</u> toMark	Modif	<u>۷</u>
Mar <u>k</u> Entry A <u>u</u> toMark					ОК	Car	ncel

The Style dialog box will open:



In the main part of this dialog box (1), you can **choose the style** that you want to modify. You will see a **preview (2)** and **specific settings (3)** for this style at the bottom of the dialog box. Click **Modify (4)** to **change these settings**. The **New** and **Delete (5)** commands will be unavailable when modifying index styles.

The Modify Style Dialog Box

If you click Modify in the Style dialog box, the **Modify Style** dialog box will open.

This is exactly the same as the dialog box that appears when creating and modifying text, table, or list styles. At the **top of the dialog box (1)**, you can enter a name and choose a type for the style. You can also choose the style that it is based on and the style for the following paragraph/line.

In the next section of the dialog box, you can customize font formatting (2) and paragraph options (3). For more



advanced options, click the **Format button (4)** and choose a category to modify. The appropriate dialog box will then open with more settings that you can customize.

All of your choices will be reflected in the **preview area (5)**. Finally, you can set **advanced options** (6) with the checkboxes and radio buttons near the bottom of the dialog box. When you are finished, click **OK** to save the changes.

Updating the Index

If you add or remove index entries, you can right-click the index and click **Update Field**, or click **References** → **Update Index**:



You can also use the **F9** shortcut.

Activity 3-2: Inserting an Index

In this activity, you will mark index entries using a variety of methods and then insert an index. Note that when we refer to a page number, we are referring to the physical location of the page, not the formatted number that appears on the page.

1. Open Microsoft 365 Word and open Activity 3-2:



 First, let us attach the concordance file to this document. Click References → Insert Index:

AutoSave 💽 🗄 🖓	∽ ॖ ≂ Activity 3-2 - Sa	aved to this PC 👻	♀ Search		John	Smith JS 🗷
File Home Insert	Draw Design Layout	References N	Aailings Review View	Help	Mark	insert Mark □! Upda
Contents ~ Table of Contents	Footnote Show Notes	Lookup Research	Citation ~ L Bibliography ~ Citations & Bibliography	Caption Cross-reference Captions	Entry Index	Citation Table of
					Insert Index Add an index listi the page number	ng key words and s they appear on.

(If the command is unavailable, place your cursor on the second page of the document.)

3. In the Index dialog box, click **AutoMark**:

ndex Table o int Pre <u>v</u> iew ristotle, 2 steroid belt. S tmosphere	f Contents ee Jupiter	Table of Fi	igures	Table of An Type: Columns: Language:	Indented English (Unite) Ru <u>n</u> -in	
int Pre <u>v</u> iew ristotle, 2 steroid belt. S tmosphere	ee Jupiter		^	Type: C <u>o</u> lumns: Language:	Indented 2 English (Unite	○ Ru <u>n</u> -in	
ristotle, 2 steroid belt. <i>S</i> tmosphere	ee Jupiter		^	Type: C <u>o</u> lumns: <u>L</u> anguage:	Indented 2 English (Upite	() Ru <u>n</u> -in	
steroid belt. S tmosphere	ee Jupiter			C <u>o</u> lumns: <u>L</u> anguage:	2		
tmosphere	e Jupiter			Language:	English (Unite		_
tmosphere					English (Onice	d States)	\sim
Earth							
Editii			¥				
Pight align na	aa numbarr						
h leader	genumbers		~				
b leadel:			×				
rma <u>t</u> s: Fror	n template		\sim				

4. Navigate to Lesson 3 of your Exercise Files folder. Select the **Concordance File** document and click **Open**:

🚾 Open Index AutoMark File				×
← → × ↑ 🔤 « Desktop	➢ Word Files ⇒ Exercise Fi	les → Lesson 3 → V Ö	Search Lesson 3	Q,
Organize 👻 New folder				?
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5. The index entries will be automatically marked. Scroll to page five to see some of these entries:

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Table of Contents	Footnotes	Research	Citations & Bibliography	Captions	Index		Table of Authorities	~
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Page 5 01 15 3397 Words [Lix English (United States)	Accessibility: Inves	ligate		رتار Focus) - + +	100%

6. Now, press Ctrl + End to go to the end of the document. Click References → Insert Index again:

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Table of Contents ~	ab 1 Insert Endnote Insert Footnote Show Notes	Smart Researcher	Insert Citation ~ [1] Bibliography ~	Insert Table of Figures	Mark Entry	Mark Citation
Table of Contents	Footnotes	Research	Citations & Bibliography	Captions	Index	Table of .
L	1		2 3 .	4 5	Add an index listi the page number	ng key words and s they appear on.

7. In the Index dialog box, choose Fancy from the Formats menu. Check the "Right align page numbers" box and click OK:

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8. The index will be added:

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	6 g Bang, 121 6 g Bang, 121 Mility Way, 5, 10, 121	B1 M1	tinuto). Merary 3,4,121 Pata 4,8,111 Saturs 3,41 Ulana, 3,41 Venus, 3,41		
	Parent 5 Error, 53, 46, 7, 9, 51 Error, 53, 44 Mare, 53, 44 J	PI	59 Solar Flace, 9, 115 Solar Flace, 9, 125 Solar Weath, 213, 4, 6, 7, 9, 400, 41, 425 Solar Weath, 214 Solar Weath, 214 Solar Black, 124 Solar Black,	48)	
u, 	uited States) 👼 (½ Accessibility: Invest	igate		(D) Focus 🖽 🔳	5 1 + 100%

9. There are a few entries that were left out of the concordance file. Go to page 11 of the document. Select an instance of the word "photosphere" that is not bolded and click References → Mark Entry:

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L	1				Mark Entry (Alt+Shift+X	C
		What-Is-the-Sola	r-Atmosphere-Like?- ¶		Add the selected text to the	he index.
- - - - - -		The-part-of-the-sun-tl the-gases-inside-the- the-"surface"-of-the- also-the-very-top-of-t	nat-you-see-in-the-sky-is-called-the- un-is-low-enough-that-they-no-lon unEverything-that-is-below-the-p he-convective-zone-of-the-sunit-is	photosphere. This-is-where-the-press ger-glow-so-bright,-and-is-generally-co hotosphere-gives-off-lightThe-photo: s-on-the-photosphere-that-you-see-sur	ure-from- onsidered- sphere-is- nspots¶	

10. Capitalize the entry and click **Mark All**:

Mark Index Entry		?	\times
Index			
Main <u>e</u> ntry: Ph	tosphere		
<u>S</u> ubentry:			
Options			
O <u>C</u> ross-referen	e: See		
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🔘 Page ra <u>n</u> ge			
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This dialog box sta multiple index ent	s open so that yo es.	u can ma	rk
<u>M</u> ark	Mark <u>A</u> ll	Can	cel

11. With the dialog box still open, select the word "Heliopause" and click inside the "Main entry" field of the Mark Index Entry dialog box:

AutoSave 👓 🖫 りゃ う 🔻	Activity 3-2 🔹	₽ Search		Joh	n Smith 🕼 🖬 — 🗆 🗙
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L	· · 1 · · · 1 · · · X · · · 1 · · · 1 ·	2	4 5	1.1.1.2.1.1.1.1.1	7 :
÷	"Photosphere". § gi convective-zone-of-	ves-off-lightThe-photosphere& XE-"f :he-sunIt-is-on-the-photosphere& XE	Photosphere". J. is also the very to ."Photosphere". J. that you see sur	p-of-the- nspots ¶ Ma	rrk Index Entry ? ×
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m 	Prominences and When you look at th at the sides of the p like it was from a wo prominences, but al the largest was alm XE "Planets Earth".	Solar-Flares ¶ esun through a telescope (with spec hotosphereš, XE."Photosphere", § th (cano. Each of these is called a promi lof them are very large. One syou ca st 400,000 kilmeters. That is almos §. These prominences are related to g	cial-filters-so-your-eyes-don't-get-da tere-appear-to-be-large-eruptions-o inenceThere-have-been-several-ki in-see-are-hundreds-of-kilometers-k t-twice-as-far-as-the-moon-is-from-to sunspots,-because-they-are-often-so	imaged!),- Pag frgases- □ nds-of- □ ong,-and- This the-Earth≩- gen-as-	Bookmant: v e number format Baid Italic Italic dialog box stays open so that you can mark lippi index extints. Mark Mark All Close

12. Inside the Mark Index Entry dialog box, select the word "**Heliopause**" and press **Ctrl + B** to remove the bold formatting. Change the "h" to a capital letter and click **Mark All**:

Mark Index En	try		?	×
Index				
Main <u>e</u> ntry:	Heliopa	ause		
<u>S</u> ubentry:				
Options				
O <u>C</u> ross-refe	erence:	See		
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This dialog box multiple index	entries.	pen so that you	can ma	rk
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13. Close the Mark Index Entry dialog box:

Mark Index Er	ntry		?	\times
Index				
Main <u>e</u> ntry:	Heliop	ause		
<u>S</u> ubentry:				
Options				
O Cross-ref	erence:	See		
Ourrent p	age			
O Page ra <u>n</u> g	ge			
Bookmar	k:			\sim
Page number f	format -			
Bold				
ltalic <u>I</u> talic				
This dialog bo multiple index	x stays o entries.	open so that yo	ou can ma	ark
Mar	k	Mark All	Clo	ose

14. Click **Home** → **Show/Hide** to hide the formatting marks:



15. Press **Ctrl + End** to go to the last page of the document. Place your cursor in the index and click **References** → **Update Index**:

AutoSave 💽 🗄 ウィ 🖓 🗢	Activity 3-2 👻	,₽ Search		John S	mith (15) 050 — C	×
File Home Insert Draw	Design Layout References	Mailings Review View	Help		🖻 Share 🛛 🖓 Cor	mments
Table of Contents	Insert Endnote abi Next Footnote → Show Notes Show Notes Show Stroker	Insert Citation ~ [1] Bibliography ~	Insert Table of Figures	Mark Entry	Mark Citation	ties
L	1 · · · 4 · · · 1 · · · 3 · · · 1 · · ·	2 · · · · · · · · · · · · · · · ·		Update Index	lable of Authorities	
	Big Beng (32	B	U Mercury, 3. 4, 11 Neptune, 3, 4 Pilot, 4, 9, 11 Saturn, 3, 4	Update the index s entries refer to the number.	s that all the correct page	
		M	Uranus, 3, 4 Venus, 3, 4			
	Milky Way 5 10 12	_				
	11111 1107, 0, 10, 11		s			
		P	Solar Flare, 9, 11 Solar System 2, 3, 4, 5, 7, 9, 10, 11, 12			
- - - - -	Planets Earth. 3, 4, 6, 7, 9, 1 Jupiter, 3, 4 Mars, 3, 4	1, 12	Solar Weather, 11 Sun, 3, 4, 6, 7, 8, 9, 12 Superglant, 6			

16. The index will be updated with the new entries:



17. Save your document as Activity 3-2 Complete. Close Microsoft 365 Word to complete this activity.

Microsoft 365 Word: Part 3

TOPIC C: Insert a Table of Contents

Microsoft Word also includes some powerful tools for automatically generating a table of contents, which lists the major headings in a document. In this topic, you will learn how to create and customize a table of contents.

Topic Objectives

In this session, you will learn:

- What a table of contents is
- How to use the Table of Contents dialog box
- How to mark text for inclusion in a table of contents using several different techniques
- How to update a table of contents

Table of Contents

A table of contents is made up of three major parts:

Table of Contents
Business Overview1
Business Plan2
Company Description2
Executive Summary2
Market 1 d Sales Strategy
List of Products and Services
Market Analysis
Organizational Structure3
Financial Projections4
30-Second Pitch5

- 1. This is the list of headings in the document.
- 2. These characters are called tab leaders. They fill in the space between your headings and your page numbers. You can choose different styles of tab leaders, including none at all.
- **3.** Page numbers are listed here.

You can hold the Ctrl key and click on any of the headings to go to that part of the document:

Table of Contents					
Business Overview	w				
Business Plan	Current Document Ctrl+Click to follow link	2			
Company Descrip	tīþn				
Executive Summa	ary	2			
Marketing and Sa	les Strategy	2			
List of Products a	nd Services	2			
Market Analysis					
Organizational St	ructure				
Financial Projections4					
30-Second Pitch5					
Index7					

One of the key things to remember when working with tables of contents that are generated by Word is that you should never edit the table of contents itself. If you do make changes to an automatic TOC, they will be overwritten once the table of contents is updated.

In addition, you may have noticed that if you click in your table of contents, it will appear inside a special box and gray shading may appear. This acts as only a temporary visual aid to separate it from the other text, and will not be printed.

The Table of Contents Dialog Box

To create a table of contents, click in your document to place your cursor where you want the table to appear. (Generally, this will be at or near the beginning of the document.) Then, click **References** → **Table of Contents** and choose one of the available styles:

The first two entries in the menu are automatic tables, meaning that Word will change the text and page numbers to match the headings and corresponding pages in your document. The third choice, Manual Table, lets you create a table of contents where you can enter the headings yourself.

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Built-In				
Automatic Table 1				
Contents Heading 1 Heading 2 Heading 3				1 1 1
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Table of Contents Heading 1				1
Heading 2				1
Manual Table				
Table of Contents Type chapter title (level 2) Type chapter title (level 2) Type chapter title (level 3) Type chapter title (level 1)				
More Tables of Contents	s from Offic	e.com		>
Custom Table of Conter	nts			
Remove Table of Conter	nts			
Save Selection to Table of	of Contents	Gallery		

To create a custom table of contents, click **References** \rightarrow **Table of Contents** \rightarrow **Custom Table of Contents**:



The Table of Contents dialog box will appear. This dialog box allows you to customize every aspect of your table of contents:

able of Contents				?	×
Index Table of (ontents Ta	able of Figures	Table of Authorities		
Print Pre <u>v</u> iew			Web Preview		
Heading 1		1 ^	Heading 1		^
Heading 2		3 🚺	Heading 2		
Heading 3		5	Heading 3		
		×			×
Show page num	bers		Use hyperlinks instead (of page nun	ibers
✓] <u>Right align page</u>	numbers	2			
la <u>b</u> leader:		~			
General					
Forma <u>t</u> s: Fi	om template	~			
Show levels: 3		2			
Super Jereia,					
				4	
			Options	<u>M</u> odif	y
			ОК	Car	ncel

The **top part of the dialog box (1)** shows a preview of how the table of contents will look with the current settings in both print and web formats. You can **customize page number display (2)** with

the options below these previews. You can also choose a **pre-defined format** for the table of contents and customize the **number of levels shown (3)**.

The commands at the bottom of the dialog box (4) allow you to set advanced options (which we will look at in a moment) and modify the style of various TOC levels.

When you are ready, click **OK** to insert your TOC:

able of C	ontents			?	×
Index	Table of <u>C</u> ontents	Table of Figures	Table of Authorities		
Print Pre <u>v</u>	view		Web Preview		
HEADIN	NG 1	1	HEADING 1		^
	G 2	3	HEADING 2 HEADING 3		
<u>S</u> how	page numbers	v	Use <u>h</u> yperlinks instead	of page nun	nbers
⊻ <u>R</u> ight Ta <u>b</u> leade	align page numbers er:	~			
General					
Forma <u>t</u> : Show <u>l</u> e	s: Fancy evels: 3	~			
			<u>O</u> ptions	Modif	īy
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Here is what our table of contents looks like with the above settings:

Table of Contents	
BUSINESS OVERVIEW	1
BUSINESS PLAN	2
COMPANY DESCRIPTION	2
EXECUTIVE SUMMARY	2
MARKETING AND SALES STRATEGY	2
LIST OF PRODUCTS AND SERVICES	2
MARKET ANALYSIS	3
ORGANIZATIONAL STRUCTURE	3
FINANCIAL PROJECTIONS	4
30-SECOND PITCH	5
INDEX	7

The Add Text Option

Microsoft Word will automatically add heading text to the table of contents up to the level specified in the Table of Contents dialog box (or in the options set for a pre-defined table).

You can mark headings using the pre-defined styles available in the Styles gallery, or with the **Add Text** menu on the References tab:



This will mark the text with the appropriate outline level and give it the proper heading formatting.

The Mark Table of Contents Entry Dialog Box

You can also use the Mark Table of Contents Entry dialog box to mark entries for tables of contents. To access this dialog box, you can add its command to the Quick Access toolbar or a custom ribbon tab via the **Word Options** dialog box:

Word Options						?	×
General	ि ह्या Customize the Quick Access	Toolbar.					
Display							
Proofing	Choose commands from: ()			Customize <u>Q</u> uick Ac	cess I oolbar: (i)		
	All Commands	*		For all documents (default)	•	
Save							
Language	Mark as Final			AutoSave			
Ease of Access	🚰 Mark Citation			Save			
	Mark Entry			Dindo		1	
Advanced	Mark Index Entry			O Redo			
Customize Ribbon	間 Master Document						
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Add-ins	Materix	•					
Trust Center	Maximize All						
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	👌 Media Clip Options		Add >> N				
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	Merge	J					
	Merge Cells						
	Merge Subdocument						
	Merge to Fax						
	Mersage Header						
	Message Properties						
	Microsoft Access						
	Microsoft Excel						
	Microsoft Outlook			Modify			
	Microsoft PowerPoint	•		Customizations:	R <u>e</u> set 🔻 🕕		
	Show Quick Access Toolbar below	the Ribbon		Ir	ngort/Export 🔻 🛈		
L L_					ОК	C	ancel

Or, use the **Alt + Shift + O** shortcut. Here is what the Mark Table of Contents Entry dialog box looks like:

Mark Table of C	?	×	
Entry:			
Table <u>i</u> dentifier:	c ~		
Level:	1 ≑		
	<u>M</u> ark	Ca	ncel

First, select the document text that you want to include in the table of contents. Then, click in the **Entry** field to place it there:

AutoSave 💽 🗄 りゃ し 👓	ZoomFoods +	♀ Search	
File Home Insert Draw Add Text ~ Table of Contents ~ Table of Contents ~	Design Layout References M in Insert Endnote ab Next Footnote - Show Notes Show Notes Show Notes Design Layout References M Smart Researcher Lookup Percearch	Mailings Review View Help Insert Insert Insert Insert Citation ~ Bibliography ~ Insert Caption	s
L	Product List > 500 gram single > 750 gram family > 800 gram desset > Mix and Match j > 30-day meal pace	-serve product y product rt package ckage Mark Table of Contents Entry ? × Entry: Product List Table identifier: C × Level: 1 ÷	1 •
-	Service List	Mark Cancel	

Like the Mark Index Entry dialog box, the text will keep the formatting and capitalization from the document. However, you can modify it as necessary.

Next, make sure the "Table identifier" field is set to C. Set the desired level and click Mark:

Mark Table of C	?	×	
Entry: Product	ist		
Table <u>i</u> dentifier:	c 🗸		
<u>L</u> evel:	1 ≑		
	Mark	(Cancel

Note that in order for these fields to be included in the TOC, you must click **References** \rightarrow **Table of Contents** \rightarrow **Custom Table of Contents** to open the Table of Contents dialog box. Then, click **Options** to open the related dialog box.

Table of Contents			?	×
Index Table of Contents	Table of Figures	Table of Authorities		
Print Pre <u>v</u> iew		Web Preview		
HEADING 1	<u>1</u>	HEADING 1		^
HEADING 2	3	HEADING 2		
HEADING 3	5 🗸	HEADING 3		~
✓ Show page numbers		Use <u>hyperlinks</u> instead of	of page num	bers
Right align page number	;			
Ta <u>b</u> leader:	\sim			
General Formats: Fancy	~			
Show levels: 3	-			
		Options	Modif	у
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In the Table of Contents Options dialog box, ensure that "**Table entry fields**" is checked and click **OK**:



Click **OK** in the Table of Contents dialog box and click **OK** to replace the current table (if prompted). The table entry fields in the document will then be added to the TOC.

Updating a Table of Contents

Perhaps the most useful feature when working with an automatic table of contents in Word is the Update Table command. This command will update your table of contents to reflect any changes that you have made to your document. You can update your TOC at any time.

There are several ways to update a table of contents. The first way is to click the **Update Table** button at the top of the table:



(This command will not be available for all tables of contents.)

You can also right-click the table itself and click **Update Field** from the context menu, or use the **Update Table** command in the Table of Contents group on the References tab:

AutoSave 💽 🗄 ۶ 🏷 🔻	ZoomFoods 👻	♀ Search		John Smith	us 🗉 – 🖬 X.
File Home Insert Draw Design	Layout References	Mailings Review \	/iew Help		🖻 Share 🛛 🖓 Comments
Table of Contents ~	Inote v Inote v Inote v Smart Research Lookup	er Citation ~ D Bibliograp	ources A Insert hy * Insert Cantion	ures Dissert Index Mark Mark Citat	P Insert Table of Authorities
Table of Contents Footnotes	Research	Calibri (Body) ~ 11 ~ A	A 🗳 🎤 Captions	Index	Table of Authorities
L 1 * * * 1 *	· ·	B I <u>U</u> <i>∠</i> ~ <u>A</u> ~ <u>≡</u>	✓ Ξ ✓ Styles	· · · · · 6 · · · <u>A</u> · · · 7 · · ·	
-	BUSINESS OVERVIEW	χ Cut		1	
-	BUSINESS PLAN	Сору		2	
	Construction Descention	Paste Options:			
	EXECUTIVE SUMM			2	
~		Update Field			
	BUSINESS OVERVIEV	Edit Field		2	
1	BUSINESS PLAN	Toggle Field Codes		3	
m	Course and Decomposition	A Eont			
	COMPANY DESCRIPTION	Paragraph		3	
-	PRODUCT LIST			3	
4	EXECUTIVE SUMMARY			3	

The final method is to click to place your cursor inside the table and press the **F9** key.

With any of these actions, you may see this dialog box:

Update Table of Contents	?	×
Word is updating the table of cont of the following options: Update page numbers only Update <u>e</u> ntire table	ents. Se	lect one
ОК	Ca	ncel

If you have just made changes that affect page numbering, choose the first option. If you have added or removed headings, choose the second option. (If you are not sure, you can safely use the "Update entire table" option whenever you like.) Once you click **OK**, the table will be updated in the specified way.

Activity 3-3: Inserting a Table of Contents

In this activity, you will add a table of contents to a document. Note that when we refer to a page number, we are referring to the physical location of the page, not the formatted number that appears on the page.

1. Open Microsoft 365 Word and open Activity 3-3:





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Table of ontents ~	ab ¹ [i] Insert Endnote Insert Footnote Show Notes	Sma .ooki
Built-In		
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reading 3		1
Automatic Table 2		
Table of Contents Heading 1 Heading 2 Heading 3	L3	1 1 1
Manual Table	Automatic Table 2	
Table of Contents	Automatic table contents (labeled "Table of Contents") that includes all text formatted with the Heading 1-3 styles	
Type chapter title (level 2)		2
Type chapter title (level 3)		3
Type chapter title (level 3)	s from Office.com	3 >
Type chapter title (level 3)	s from Office.com nts	3 >
Type chapter tilk (level 3)	s from Office.com nts	······3 · >
Type chapter title (were 13) More Tables of Contents Custom Table of Contents Remove Table of Contern Save Selection to Table of	s from Office.com nts of Contents Gallerv	3 • >

3. The table of contents will be inserted. Since this document uses headings, most of the work will be done automatically:

AutoSave 💽 🖽 🏷 -	Č ≈ Activity 3-3 •	,∕⊂ Search		John Smith	× 🗆 – 🖬 🏼
File Home Insert [Draw Design Layout References	Mailings Review View	Help		🖻 Share 🖓 Comments
Add Text ~	ab L() Insert Endnote	Style: APA ~	Insert Table of Figures	Update Index	
Table of Fo	Insert Smart Research Internote Show Notes Lookup	Citation ~ DBibliography ~	Caption	Mark Entry	Citation
Table of Contents	Footnotes 🔤 Research	Citations & Bibliography	Captions	Index	Table of Authorities
L		2	4	· · <u>~</u> · · · · · · · 7 ·	
-					
	Table of Co	atonte			
1	Solar System	Items		1	
	What is the Solar S	rstem?		2	
	Who Discovered It			3	
	How Was It Former	1?		4	
1	What Will Happen	To It?		5	
N	The Sun			6	
	What Happens Insi	de The Sun?		6	
÷	What are Sunspots	?		7	
	What Is the Solar A	tmosphere Like?		8	
- -	Prominences and	i Solar Flares		8	
	Chromosphere			8	
	Corona			8	
4	Solar Wind			9	
	Zodiacal Light			9	
-	Heliopause			9	
	What is Solar Weat	her?		10	
	How the Solar System	Was Born		11	
-	Big Bang Theory			11	
Page 3 of 15 3563 words DD	English (United States) 23 (4: Arcessibility: Invi	stigate		11 'D' Forus 🖽 🗐	- + 100%

(You may need to scroll up to see the entire table.)

4. There are a few more entries that we need to add manually. Hold the Ctrl key and click the "**What Happens Inside the Sun?**" link to go to that page:



5. Scroll down a bit so that you can see the bottom half of the page. Select the text "The Core" and press Alt + Shift + O to open the Mark Table of Contents Entry dialog box:

AutoSave 💽 🖫 りィ 🤉 🕫	Activity 3-3 - 🔎 Search	John Smith JS		×
File Home Insert Draw Design	Layout References Mailings Review View Help		🖄 Share 🛛 🖓 Comm	ents
Table of Contents ~	ote Smart Researcher Ctation ~ ① Bibliography ~	Aark	Mark Citation	
lable of Contents Pootnotes	isi Research i Citations & Bibliography i Captions i	Index	lable of Authonties	^
-	Chergy, this is the same way chergy is released in a nation bonno cance a nyarogen bonno.			
	The Core: The center of the Sun is very dense. It's about 12 times as dense as lead. It's also very hot			
ю	about 15 million °C. This region is where most of the nuclear reactions are taking place.			
	The Radiation Zone: In this zone ti			
1	towards the surface. The gases th Mark Table of Contents Entry ? X bsorbing and			
	emitting the rays. Have you ever 1 Entry: The Core ight waves in			
N	this region of the sun. It can take Table identifier: C v but of this zone.			
	The Convection Zone: Have you as Level:			
1	because "heat rises"? Heat doesn asses tend to			
	rise, and cold gases tend to sink. I Mark Cancel se and so			
	behave more like ordinary gases that we see on Earth. At the bottom of the convection zone the gas			
	gets heated up by the energy that is coming through the radiation zone from the core. This gas rises			
	up to the surface of the sun where it gives up its heat and cools down. The now cold gas then sinks			
-	back down. The plumes of rising hot gas and sinking cool gas together form huge ribbons of			
	circulating gas known as convection cells.			
	The Core: The center of the sun is very dense. It's about 12 times as dense as lead. It's also very hot about 15 million "C. This region is where most of the nuclear reactions are taking place. The Radiction Zone: In this zone it this cone if the core in this zone if the ray out boording and emitting the rays. Have you even this region of the sun. It can take the sun it can take the sum in the sum it is dentifice. We use the sum is the sum of the sone the sum is the sum of the same where it gives up its heat and cools down. The now cold gas then sinks back down. The plumes of rising hot gas and sinking cool gas together form huge ribbons of circulating gas known as convection cells.			

6. Change the level to "4" and click **Mark**:

Mark Table of Contents Entry			\times
Entry: The Core	?		
Table <u>i</u> dentifier:	c ~		
Level:	4 ≑		
	Mark	Ca	ncel

 Repeat Step 6 to mark two more entries on the same page: "The Radiation Zone" and "The Convection Zone." Close the Mark Table of Contents Entry dialog box when you are finished:

AutoSave 👓 🗄 🏷 🗸 🤍	Activity 3-3 +	𝒫 Search		John Smith US	•	- 0.	×
File Home Insert Draw Design L	Layout References N	Aailings Review View I	Help		ය Share	🖓 Comm	ents
Table of Contents ~ Contents ~ Contents ~	ote v ste v Smart Researcher Lookup	Insert Citation ~ UB Bibliography ~	Insert Caption	Mark Entry	Mark Citation	b	
Table of Contents Footnotes	Fa Research	Citations & Bibliography	Captions	Index	Table of Auth	orities	^
	• What-Happens-Inside The suns sthemain source- process called atomic fusion The helium atom has slight energy. This is the same wa <i>The Corefl.</i> <u>TC: The Core</u> " <u>A</u> f times as dense as lead. It's a reactions are taking place. <i>The Radiation Zonefl.</i> <u>TC: "T</u> produced in the core fight still very dense and keep ab that's what it's kilke for high years to make it's way out o <i>The Correction Zonefl.</i> <u>TC:</u> " above a <i>file?</i> Perhaps you'v above <i>a file?</i> Perhaps you'v above <i>a file?</i> Perhaps you'v above <i>a file?</i> Perhaps you'v <i>B</i> lanets staft." <u>J</u> At the bc coming through the radiation	e-The-Sun(<u>*</u> , XE."Sun(*, j?, *) of energy-for the earth. This energen. - Nourly-drogen atoms are fused by essentiation and the four hydrogen yenergy-is released in a nuclear bot CQL'21. B-The centra of the Sung's alsovery-hot-about 15 million *C.* 1 <i>he:Radiation Zone</i> *, VC.\L*4*, j. John heir way-out towards the surface: sorbing and emitting the rays. Have waves in this region of the sun. Its fithis zone. *] <i>The Convection:Zone</i> *, VC.\L*4*, j. be been told it's because "heat rises e and so behave more like ordina tiom of the convection: zone the go on zone from the core. This gas-rise	y is released deep within the sun in a cogether to make one helium atom. hatoms; the extra mass is converted to mb called a hydrogen bomb. 1 KES(2m ¹) - is usary dense. It's about 1 this zone the light, heat, and X-rays. The gases that make up the zone are eyou ever tried to run through water can take a single ray of light a million. Have you ever steen the air shimmer "? Heat doesn't rise all by itself it's gases that we see on £ ant X_K. a gets heated uphy the encrythet is supto the surface of the sun where i	с	I		Ă

8. Hide the formatting marks in the document by clicking Home \rightarrow Show/Hide:



9. Go back to the third page in the document, which contains the table of contents. Select the table. Then, click References → Table of Contents → Custom Table of Contents:

AutoSave 💽 🗄 ウィ 💍 🗸	ctivity 3-3 • 🔎 Search	John Smith JS		×
File Home Insert Draw Design Li	yout References Mailings Review View Help		🖻 Share 🛛 🖓 Comm	nents
Table of Contents v	s Smart Researcher Lookup C Lookup C LookupC Lookup C Lookup C Lookup C Lookup C Loo	Insert Index Index	Mark Citation	
Built-In	esearch Citations & Bibliography Captions	Index	Table of Authorities	^
Automatic Table 1				
Contents Heading 1	ate hale			
Heading 2				
moung 2	Solar System? 2			
Automatic Table 2	rered It? 3			
Table of Contents	Formed? 4			
Heading 1	a lappen To It? 5			
Heading 2 Heading 3	1 6			
	ens Inside The Sun? 6			
Manual Table	unspots? 7			
Table of Contents	Solar Atmosphere Like? 8			
Type chapter title (level 1)	1 nces and Solar Flares 8			
Type chapter title (level 3)	phere 8			
More Tabler of Contents from Office com	8			
Custom Table of Contents	nd 9			
Remove Table of Contents	Light 9			
Save Selection to Table of Contents Gallery	se 9			
But gore section to rate of contents outcym	ar Weather? 10			
	How the Solar System Was Born 11			
-	Big Bang Theory 11			

10. In the Table of Contents dialog box, click the **up arrow** next to the "Show levels" field to increase the value to **4**:

Table of Contents			?	×
Index Table of Contents	Table of Figures	Table of Authorities		
Print Pre <u>v</u> iew		Web Preview		
HEADING 1	1	HEADING 1		^
HEADING 2	3	HEADING 2		
HEADING 3	5	HEADING 3		
 ✓ Show page numbers ✓ Right align page numbers Tab leader: 	~	Use <u>hyp</u> erlinks inst	ead of page nu	umbers
General Forma <u>t</u> s: Fancy Show <u>l</u> evels: 3	v v			
		Option	ns Moo	lify
		C	ок с	ancel

11. Next, click the **Options** button:

able of C	Contents			?	×
Index	Table of <u>C</u> ontents	Table of Figures	Table of Authorities		
Print Pre	view		Web Preview		_
HEADI	NG 1	1	HEADING 1		^
HEADIN	IG 2	3	HEADING 2		
HEADIN	G 3	5 🗸	Heading 4		~
✓ Show	/ page numbers		Use <u>hyperlinks</u> instead of	of page nur	nbers
✓ <u>R</u> ight	t align page numbers				
la <u>b</u> lead	er:	~			
General					
Forma <u>t</u>	s: Fancy	\sim			
Show <u>I</u>	evels: 4				
			Options	Modif	у
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12. In the Table of Contents Options dialog box, check the "Table entry fields" box and click OK:

Table	of Contents Options	? ×
Build t	able of contents from: <u>S</u> tyles	
	Available styles:	TOC <u>l</u> evel:
	Balloon Text	<u>^</u>
	Bibliography	
	Caption	
	CM34	
	CM35	
	CM36	_
	<u>O</u> utline levels Table <u>e</u> ntry fields	
<u>R</u> e	set	OK Cancel

13. Click **OK** in the Table of Contents dialog box:

able of C	Contents			?	×
Index	Table of <u>C</u> ontents	Table of Figures	Table of Authorities		
Print Pre	<u>v</u> iew		Web Preview		_
HEADI	NG 1	1	HEADING 1		
HEADIN HEADIN	I G 2 G 3	3 5 v	HEADING 2 HEADING 3 Heading 4		~
☑ <u>S</u> how ☑ <u>R</u> ight Ta <u>b</u> lead	/ page numbers : align page numbers er:	~	☑ Use <u>h</u> yperlinks inst	ead of page num	bers
General Forma <u>t</u> Show <u>I</u>	s: Fancy evels: 4	×			
			Option	ns Modify	
			C	K Can	cel

14. Click **Yes** if you are prompted to replace the existing TOC:



(If you do not see this prompt, skip to the next step.)

15. The table will be updated and you will see the new entries added:

AutoSave 🞯 🖫 🍤 🗸 🗸	Activity 3-3 -	₽ Search		John Sr	mith 🥵 🗉 — 🗆 🗙
File Home Insert Draw	Design Layout References M	Mailings Review View	Help		🖻 Share 🛛 🖓 Comments
Table of Contents ~	Insert Endnote ⇒ Next Footnote ~ Show Notes Show Notes	Insert Citation ~ DBibliography ~	Insert Table of Figures	Mark Entry	Mark Citation
Table of Contents F	ootnotes 🔤 Research	Citations & Bibliography	Captions	Index	Table of Authorities
	Table of Cc Solar System What is the Solar Who Discovered How Wast Form What Will Happer The Sun	System?			
	What Happens In: The Core The Radiatio	n Zone			
	The Convecti	on Zone		6	

16. Save your document as Activity 3-3 Complete. Close Microsoft Word 365 to complete this activity.

TOPIC D: Insert an Ancillary Table

Although the table of contents is the most common type of table that you will create in a complex document, there are several other types of tables that you can create as well. In this topic, you will learn how to create tables of figures as well as tables of authorities.

Topic Objectives

In this session, you will learn:

- About ancillary tables
- How to use the Table of Figures dialog box
- About tables of authorities
- How to use the Mark Citation and Table of Authorities dialog boxes
- How to identify the field code for a marked citation

Ancillary Tables

There are two main types of ancillary tables in Microsoft Word.

- A **table of figures** lists all of the graphics, equations, and tables in a document. (However, for a figure to be recognized by Word as such, it must have a caption.)
- A table of authorities lists the cases, statutes, and other references in a legal document.

The Table of Figures Dialog Box

Before you add a table of figures, you should first make sure that all illustrations are properly captioned. (See Topic A of Lesson 2 for more information.) Then, place your cursor where you want the table to go. Finally, click References \rightarrow Insert Table of Figures:



The Table of Figures dialog box will appear:

Table of Figures	? ×
Index Table of Contents Table of Figu	res Table of Authorities
Print Pre <u>v</u> iew	Web Preview
Figure 1: Text1	Figure 1: Text
Figure 2: Text3	Figure 2: Text
Figure 3: Text5	Figure 3: Text
Figure 4: Text7	Figure 4: Text
✓ Show page numbers	Use hyperlinks instead of page numbers
Right align page numbers	
Ta <u>b</u> leader:	
	_
General	1
Forma <u>t</u> s: From template	
Caption <u>l</u> abel: Figure	
Include label and <u>n</u> umber	4
	Options <u>M</u> odify
	OK Cancel

Like the Index and Table of Contents dialog boxes, you can use this dialog box to customize how your table of figures will look. The **top part of the dialog box (1)** shows a preview of how the table of figures will look with the current settings in both print and web formats. You can **customize page number display (2)** with the options below these previews. You can also choose a **predefined format** for the table of contents and then customize the **type of figures listed (3)**.

The commands at the bottom of the dialog box (4) allow you to set **advanced options** and **modify the style** of various levels of the table.

Once you are ready, click **OK** to insert the table:

Like other types of tables, if you add or modify figures, you can use the **Update Table** command in the Captions group of the References tab or right-click the table and click **Update Field**. You can also use the **F9** shortcut.

Other Types of Reference Tables
If you want to create a table just of tables, figures, or equations, simply choose that option from the "**Caption label**" menu in the Table of Figures dialog box:

Table of Figures	?	×
Index Table of Contents Table of Figures Table of Authorities		
Print Preview Web Preview Figure 1: Text1 Figure 1: Text		^
Figure 2: Text		
Figure 4: Text		
✓ <u>S</u> how page numbers ✓ <u>R</u> ight align page numbers	page nun	nbers
Ta <u>b</u> leader:		
General		
Forma <u>t</u> s: From template \checkmark		
Caption label: Include labe Equation Figure Table Definition Table	<u>M</u> odif	ý
ОК	Car	ncel

Table of Authorities

You will often find a **table of authorities** in legal documents. It lists the cases, statutes, and other authorities used in the document, as marked by legal citations.

The Mark Citation Dialog Box

To create a legal citation to include in a table of authorities, select the long citation in the document. Then, click References \rightarrow Mark Citation:



You will then see the Mark Citation dialog box appear. Make the necessary changes to the "Short citation" field and make sure that you have the proper category selected from the Category menu. Then, click **Mark**:

Mark Citat	ion		?	×
Selected <u>t</u> e	xt:			
Myers vs. / (2020)	Acme Foods, 291 U.S. 204,695	^	<u>N</u> ext Ci	itation
		× .	<u>M</u> a	ark 📐
<u>C</u> ategory:	Cases	\sim	Marl	k <u>A</u> ll
Short citati	on:			
Myers vs. A	cme Foods, 291 U.S. 204,695 (2020)		Categ	lory
		\sim		
		~		
Long citation	on:			
			Can	ncel

You can then close the dialog box or mark more citations.

The Table of Authorities Dialog Box

Once you have marked all citations, place your cursor in the location where you would like the table of authorities to appear. Then, click the **Insert Table of Authorities** command on the References tab:



The Table of Authorities dialog box will open:

able of Aut	norities			7	? ×
Index T	able of Contents	Table of Fig	jures	Table of <u>A</u> uthorities	
Print Pre <u>v</u> iev	w			Category:	
Cases Baldwin v 58 Wn. Dravo Co 79 Wn Use pass Keep ori	. Alberti, 2d 243 (1961) rp. v. Metro. Se 2d 214 (1971) ginal fo <u>r</u> matting	1 5, 6 attle, naccim	*	All Cases Statutes Other Authorities Rules Treatises Regulations Constitutional Provisions 8	Ŷ
Forma <u>t</u> s:	From template			4)	

This dialog box is very similar to the others that we have encountered. In the top left of the dialog box **(1)**, you will see a **preview** of how the table will look with the current settings. In the top right, you can choose what **reference types** to include in the table **(2)**.

Below the preview, you can set **formatting** and **passim options (3)** for the table. You can also customize the **tab leader** and **general format** used **(4)**.

The commands at the bottom of the dialog box (5) allow you to mark citations using the dialog box that we discussed earlier and to modify the styles that the table will use.

Once you have set your options, click **OK** to insert the table of authorities and close this dialog box.

The table of authorities will appear at the specified location. A separate table will be created for each type of citation in the document:

AutoSave 💽 🗄 🏷 🏷 🗢	Sales Report 👻	₽ Search			John Smith	JS C	n –		ĸ
File Home Insert Draw De	sign Layout References	Mailings Review	View Help			ß	Share 🛛 🖓	Comments	;
$ \begin{array}{c c} & & \\ & & \\ & \\ & \\ & \\ & \\ & \\ & \\ & $	× Aa × A ₀ ⊟ × !⊟ × !⊞ × × ▲ × ■ = = = 1	i e≡ ≠≡ 2↓ ¶ A ≣ - 2⁄4 - ⊞ - 1	AaBbCcDt AaBbCcDt AaBbCc / 1 Normal 1 No Spac Heading 1	AaBbCcE AaB	P Find → \$\$C Replace \$ Select →	Dictate	Sensitivity	Editor	
Clipboard 🕞 Font	Farag	jraph 🖓	Styles	15	Editing	Voice	Sensitivity	Editor	^
N	Cases Myers vs. Acme Foods Smith vs. Main Widge Statutes P. C. 4511 19(A)(1)	5, 291 U.S. 204,695 (2020) 15, 291 U.S. 101,352 (2010							

Like other types of tables, if you add or modify legal citations, you can use the **Update Table** command in the Table of Authorities group on the References tab or right-click the table and click **Update Field**. The **F9** shortcut will also update this type of table.

Field Code for a Marked Citation

Like index entries and other references, marked citations use field codes:

For·more·information,·see·Myers·vs.·Acme·Foods,·291·U.S.·204,695·(2020). TA·\\-"Myers·vs.·Acme·Foods,· 291·U.S.·204,695·(2020)"·\s·"Myers·vs.·Acme·Foods,·291·U.S.·204,695·(2020)"·\c·14.¶

"Use Passim" Option

You may have noticed the "**Use passim**" option in the Table of Authorities dialog box:

This option is set by default and will use the word "passim" in place of page numbers in a table of authorities if a case is referenced more than five times in the document.

able of A	uthorities			?	>
Index	Table of Contents	Table of Figures	Table of <u>A</u> uthorities		
Print Pre <u>v</u>	riew		Category:		
Cases Baldwir 58 W Dravo (79 W Keep Ta <u>b</u> leade Forma <u>t</u> s:	n v. Alberti, In. 2d 243 (1961) Corp. v. Metro. Se In. 2d 214 (1971) 1 assim original formatting er: From template		All Cases Statutes Other Authorities Rules Treatises Regulations Constitutional Provisions 8		
			Mar <u>k</u> Citation	. <u>M</u> od	ify
			ОК	Ca	ancel

Activity 3-4: Inserting Ancillary Tables

In this activity, you will add a table of figures and a table of authorities to a document.

1. To begin, open Activity 3-4 in Microsoft Word 365:



2. Scroll through the document. You can see that there are a number of diagrams that have captions:

AutoSave 💽 🗄 🏷 🗧 🖛	Activity 3-4 - Saved to this PC -	Search		John S	mith US	ॼ –	۵	×
File Home Insert Draw	Design Layout References Mailing	s Review View He	lp			ピ Share	Comment	ćs
Paste \checkmark \checkmark \blacksquare $I \sqcup \checkmark \Rightarrow x_2 x^2$	 A* Aa + A₀ I≡ + I≡ + V∈ + I≡ I A + ∠ + A + I≡ = Ξ ≡ I≡ + A 	E 2↓ ¶ AaBbCcD A ≥ ~ ⊞ ~ Important N	AaBbCcD AaBbC to Spacing Heading 1 Heading 2	c AaBbCc → 2 Heading 3 → 2 Sele	I ~ Jace Dict	tate Sensitivit	Editor	
Clipboard Fa Font	Fa Paragraph	5	Styles	rs Editi	ng Vo	ice Sensitivit	/ Editor	~
	employees about it, and en (typically the Human Rescu some legal advice. This grou guidelines to ensure that the effort, but the end result w Writing the Policy Your policy needs to have fi The rules. Specific I Safe from The complaint Figur 2. The scienced element.	forcing it. The policy needs reces department), preferal p should also lay out educ the policy is effective. Writin ill be a document that out we essential elements. Dehaviors, examplet n reprisal. equences. mt's rights.	to be written by a team of pe oly with the input of staff at all staff, follow-up, and monitori g a policy will take time, reso. Iner your company's stance or s, and circumstances.	I levels and ing arces, and bullying.				

3. Go to the end of the document. Place your cursor below the title "Table of Figures." Click References → Insert Table of Figures:

AutoSave 💽 🖁 🥱	a - 	Activity 3-4 👻	𝒫 Search			
File Home Insert	Draw Design Lay	out References N	Aailings Review View	Help		
Table of Contents ~	ab ¹ Insert Endnote Insert Footnote Show Notes	Smart Researcher	Insert Citation ~ L Bibliography ~	Insert Caption	Insert Table of Figures	Mark Entry
Table of Contents	Footnotes	Research ہوا	Citations & Bibliography		Captions	
L	1 * * * 1 * * *	¥ · · · · · · · · · · · · · ·	1 · · · 2 · · · 1 · · · 3 · · ·	4	Table of Figures Dialog	
-					Add a list of captioned objution their page numbers for qui reference.	ects and ck
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:		Table of Figures				
1		I				
-		1				

able of Figures			?	\times
Index Table of Contents	Table of <u>F</u> igures	Table of Authorities		
Print Pre <u>v</u> iew	1	Web Preview		
FIGURE 1: TEXT FIGURE 2: TEXT FIGURE 3: TEXT FIGURE 4: TEXT FIGURE 5: TEXT	1 3 5 7 10	FIGURE 1: TEXT FIGURE 2: TEXT FIGURE 3: TEXT FIGURE 4: TEXT FIGURE 5: TEXT		^
✓ Show page numbers ✓ Right align page numbers Гаb leader: General	✓	✓ Use <u>h</u> yperlinks instead o	of page num	bers
Forma <u>t</u> s: Classic Caption <u>l</u> abel: Figure Include label and <u>n</u> umber				
		Options	Modif	у
		ОК	Car	ncel

4. Choose "Classic" from the Formats menu. Click OK:

5. The table will be created:



6. Now let us mark the legal references in the document. Go to page three. Select the line "Myers vs. Southside Shipping, 8 Adj. 1d768(1999)." Click References → Mark Citation:

AutoSave 💽 🖫 ۶ 🏷 🔻	Activity 3-4 🖌	♀ Search		John S	imith 💶 — 🗆 🗙
File Home Insert Draw Desi	ign Layout References N	failings Review View	Help		🖻 Share 🛛 🖓 Comments
Table of Contents v	ert Endnote xt Footnote ~ Smart Researcher Lookup	Insert Citation v Bibliography v	Insert Table of Figures	Mark Entry	Mark Update Table
Table of Contents Footnot	tes 🔂 Research	Citations & Bibliography	Captions	Index	Table of Authorities
L 1	· · · · · A · · · · · · · · · · · · · ·	2	4	6	Mark Citation (Alt+Shift+I)
· · · ·	Add the selected text to the Table of Authorities.				
	A complainant's right	s.			
	Make sure victims kno including confidentiali avenues of complaint: government departme 1d768(1999).	w what will happen if they file ty, privacy, and the right to a the union, internal Human Re ent, police, or the legal system	e a complaint and what rights th fair hearing. They should also kn esources department, appropria n. Myers vs. Southside Shipping,	ey have, ow their te 8Adj.	

7. Make sure that the **Cases** category is selected and then click **Mark**:

Mark Citation	?	\times
Selected <u>t</u> ext:		
Myers vs. Southside Shipping, 8Adj.	<u>N</u> ext Ci	tation
· · · · · · · · · · · · · · · · · · ·	<u>M</u> a	rk 📐
Category: Cases	Mark	(<u>A</u> II
Short citation:		_
Myers vs. Southside Shipping, 8Adj. 1d768(1999)	Categ	ory
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Long citation:		
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8. After marking the citation, click **Close**:

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Myers vs. 1d768(19	Southside Shipping, 8Adj. 999)	CI	ose

9. The citation will be added to the document. Hidden characters will also be enabled, allowing you to see the reference:

A-complainant's-rights.¶ Make-sure-victims-know-what-will-happen-if-they-file-a-complaint-and-what-rights-they-have,including-confidentiality,-privacy,-and-the-right-to-a-fair-hearing. They-should-also-know-theiravenues-of-complaint:-the-union,-internal-Human-Resources-department,-appropriategovernment-department,-police,-or-the-legal-system.-Myers-vs.-Southside-Shipping,-8Adj.-1d768(1999)#-TA-\I-"Myers-vs.-Southside-Shipping,-8Adj.-1d768(1999)"-\s-"Myers-vs.-Southside-Shipping,-8Adj.-1d768(1999)"-\c-1

10. Scroll to the next page and select the text "Chan v. Levi Strauss Inc, 27 Adj. (1998)." Click References → Mark Citation:

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Table of Contents	Footnotes 🕠	Research Citations & B	bliography Captions	Index	Table of Authorities	~
	but i It is inter Give Trai do fa whe Adj.	r copy or the policy and reier to its also a good idea to post the policy acts with the organization (includ people the tools to fight. employees about what buillying in them if they are builled. Traditi addressing bullying issues; we w (1998).	ouring discussions with employees. In a public location and to require that ng suppliers and clients) abides by it. Doks like, what they can do, and what it inally, employers have been more hurtf ould like to see that change. Chan't Lev	anyone who he employer will ui than heipful vi Strauss Inc, 27		

11. Ensure that the **Cases** category has been selected and then click **Mark**:

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Myers vs. S	outhside Shipping, 8Adj. 1d768(1999) /	^ _		
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13. Turn off paragraph markings by clicking **Home** → **Show/Hide**:

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Place your cursor below the table of figures that you created earlier. Press Enter twice to create some space. Then, type "Table of Authorities" using the Heading 1 style.Press Enter after the heading:

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15. Click **References** → **Insert Table of Authorities**:

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Table of Contents	Footnotes 5	Research	Citations & Bibliography	Captions	Index		Table of Autho	rities	~
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16. In the Table of Authorities dialog box, ensure **All** is selected under the Category heading and select "**Classic**" from the Formats menu. Click **OK**:

Table of Au	thorities			?	×
Index	Table of Contents	Table of Figures	Table of <u>A</u> uthorities		
Print Previe	ew		Category:		
CASES Baldwin v 58 Wn Dravo Co. 79 Wn Forrester v 51 Wn ✓ Use pa: ✓ Keep of Ta <u>b</u> leader Forma <u>t</u> s:	. Alberti, . 2d 243 (1961) rp. v. Metro. Seattle, . 2d 214 (1971) r. Craddock, . 2d 315 (1957) ssim riginal formatting :		All Cases Statutes Other Authorities Rules Treatises Regulations Constitutional Provisions 8		~
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17. The table will be inserted:

Table of Authorities
CASES
Chan v. Levi Strauss Inc, 27 Adj. (1998)

18. Save your document as Activity 3-4 Complete. Close Microsoft Word 365 to complete this activity.

TOPIC E: Manage Outlines

The next tool that we will look at is one that you will use before creating a complex document: outlining. In this topic, you will learn how to create and manage outlines using Microsoft Word 365.

Topic Objectives

In this session, you will learn:

- How to switch to Outline view
- About the symbols in Outline view
- How to use the tools on the Outlining tab
- How to create an outline
- How to promote and demote outline sections

Outline View

To switch to Outline view, click View→ Outline:



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 Benefits Prototyping Process Here we will outline our prototyping process. Testing Processes Internal Procedures
 Checklist External Procedures
 Checklist Production Processes

Your document will then be displayed in Outline view:

Outline view is special for a few reasons:

- It implements heading styles as indents rather than using numbers or bullets to identify different levels of text. Although the heading styles will remain consistent, the indents you see in Outline view will not be reflected in other views because they are a visual aid rather than actual formatting.
- You do not have to worry about formatting while in Outline view. Once your outline is as complete as possible, switch to another view (such as Print Layout) to start writing the content of your document.
- Outline view displays the Outlining tab, which will be discussed in detail later in this topic.

Outline Symbols

In Outline view, Microsoft Word displays markers beside different types of headings:



Headings that have subordinate text have **plus signs** next to them **(1)**. Headings without subordinate text (or without a level applied to them) have a **minus sign** next to them **(2)**. Paragraphs that contain regular text (known as body text) are marked with a **dot (3)**.

Outline View Tools

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 File
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When you switch to Outline view, you will see the **Outlining** tab:

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Outline Tools						Maste	er Document	Close

Let us take a quick look at its groups.

- **Outline Tools:** The first half of this group contains commands to promote, demote, move, expand, and collapse headings, as well as a menu to choose what level to apply to selected text. The second half of the group contains options to control the display of the outline text.
- Master Document: Contains commands to show or hide subdocuments. When you show subdocuments, you will see commands for managing them in this group. (See the next topic for more details.)
- **Close Group:** Contains a single command which closes Outline view and returns you to the normal document view.

Creating an Outline

Now that you know the basics of the outlining tools, let us look at how to create an actual outline. If you have opened a blank document and then switched to Outline view, the first sentence you type will automatically be at Level 1. Once you press Enter, the next sentence will be at Level 1 as well. This is a great way to get all your major ideas listed at once.

In our sample outline, you can see that outline levels have been created based on the heading styles we used:



You can add headings at a lower level by pressing the **Tab** key once for each level you want to demote, or you can use the **Demote** arrow on the Outlining tab. You can also do this for existing text:



Word allows you to use nine different outline levels, plus body text, to organize your work.

If you want to hide the subordinate text (collapse the heading's contents), simply select a heading and click the **Collapse** command on the Outlining tab once for each heading level you want to hide:



To see the text again, click the heading and click the **Expand** command for each heading level you want to show:



You can also double-click the + and – icons to the left of outline headings to expand and collapse subordinate items, respectively.

To move a heading, select it and drag it up or down in the list to rearrange the document order. You will see a grey line appear, showing you where the heading will be moved:



You can also select a heading and use the **Move Up/Move Down** arrows on the Outlining tab to move it:



Note that if you move a heading that has visible subitems, the subitems will not move with the main heading. You will have to move all elements separately or, more simply, collapse the heading and then move it.

Promoting and Demoting Sections

The point of an outline is to lay out your ideas and brainstorm. Naturally, as you work on your outline, some ideas will become more or less important. If this happens, you may want to promote or demote your headings. If you demote a heading, its subheadings will be affected as well.

Remember, the **Promote** and **Demote** commands can be found in the Outline Tools group of the Outlining tab:



Here is an overview of each command in this group.

~	Promote item to Heading 1.
\leftarrow	Promote item one level.
Body Text ~	Choose the specific level to apply to this item.
\rightarrow	Demote item one level.
\gg	Demote item to body text.

For example, let us say you demote Level 1 text to Level 2. Any Level 2 text in that section will be demoted to Level 3; any Level 3 text will be demoted to Level 4; and so on.

Take a look at this sample outline section:



Now look at what happens when we demote it by one level:

Design Processes					
Prototyping Process					
 Testing Processes 					
🕂 Internal					
 Procedures 					
 Checklist 					
🕂 External					
 Procedures 					
 Checklist 					
Production Processes					

Activity 3-5: Managing Outlines

In this activity, we will turn a plain text document into a document outline.

1. Open Microsoft Word 365 and open Activity 3-5:



2. Click View → Outline:



3. With your cursor in the first line, click **Outlining** \rightarrow **Promote to Heading 1**:



4. Select the next four lines. Click **Outlining → Outline Level menu → Level 2**:



- The headings will be promoted, but notice that this did not change the formatting of the text:

 What is the Solar System?

 What is the Solar System?
 What is the Solar System?
 What is the Solar System?
 What is the Solar System?
 What is the Solar System?
 What is the Solar System?
 What is the Solar System?
 What is the Solar System?
 What Will Happen To It?
 The Sun
 - What is the Solar System?
 Who Discovered It?
 How Was It Formed?
 What Will Happen To It?
 The Sun
 What Happens Inside The Sun?
 What are Sunspots?
 What Is the Solar Atmosphere Like?
 Prominences and Solar Flares
 Chromosphere
 Corona
 Solar Wind
 Zodiacal Light
 Heliopause
 What is Solar Weather?
 How the Solar System Was Born
 Big Bang Theory
 Solar System Formation
- 6. Now, select the lines "The Sun" and "How the Solar System Was Born." Apply either of the methods we just used to promote these lines to Heading 1:

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Out	line Tools
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Promote this item to the higher level of the outline.	st :em?
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🕀 🛛 What Will Happ	pen To It?
 The Sun 	
 What Happ 	pens Inside The Sun?
 What are S 	unspots?
 What is the 	e Solar Atmosphere Like?
Prominence	es and Solar Flares
Chromosp	nere
Corona Solar Wind	
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 What is So 	, lar Weather?
 How the So 	olar System Was Born
 Big Bang Th 	heory
Solar Syste	m Formation
—	

7. Apply Level 2 to the first three lines under "The Sun" heading:



8. Apply Level 2 to the lines under the "How the Solar System Was Born" heading:



9. Click to place your cursor after the "What are Sunspots?" heading and press Enter:



10. Click **Outlining** → **Demote**:



11. Add the headings "Definition" and "Complexity:"



The outline is now complete. Now, just show the top headings by clicking Outlining →
 Show Level → Level 1:

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• · · · 1	Show Text F	o Level 1
~ ~ + -	Show First I	ii Level 2 😡
Outline	e Tools	Level 3
Solar System		Level 4
 What is the Solar 	System?	Level 5
Who Discovered I	t?	Level 6
 How Was It Form What Will Happer 	ea? h To It?	Level 7
The Sun		Level 8
What Happens In	side The Sun?	Level 9
🕀 What are Sunspo	ts?	All Levels
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Chromosphere	re	
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 Solar Wind Zodiacal Light 		
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 What is Solar 	Weather?	
How the Solar Sys	tem Was B	Born
Big Bang Theory		
 Solar System Forr 	nation	

13. You will now see only the Level 1 headings:



14. Click Close Outline View:



15. Save your document as Activity 3-5 Complete. Close Microsoft Word 365 to complete this activity.

TOPIC F: Create a Master Document

In the last topic, we explored Outline view, which contains tools for master and subdocuments. In this topic, we will take a closer look at this feature.

Topic Objectives

In this session, you will learn:

- What a master document is
- What the benefits of master documents are
- How to create a master document and subdocuments
- How to use the Master Document group on the Outlining tab
- How to manage subdocuments

Master Documents

If you are creating complex documents, you may want to consider using master and subdocuments. First, you create a **master document** and then you nest **subdocuments** into it. Each subdocument is saved separately, but they are all included in the master document.

Benefits of Master Documents

Using a master/subdocument configuration when working with complex documents provides several benefits.

- Rather than rearranging or managing large blocks of text, you can work with single subdocuments in Outline view.
- If the same piece of text (such as a company profile) is going to be used in multiple documents, you can have one document in one location that is then linked to multiple master documents, making updates and edits easy.
- You can streamline references such as captions, index entries, citations, etc.
- Since subdocuments are linked to the master document, the master document will be a smaller size than if the text were embedded.

Creating a Master Document

Your first step in creating a master document is to create a location in Windows where all the documents for this project (the master document and all the subdocuments) are going to be stored.

Next, create the master document and save it in this location. Then, create the content of the master document. Start by switching to Outline view. (Remember that you can do this using the View tab.) Then, type your document in Outline view, assigning headings and levels to each of the topics:



(You can also take an existing document and format it using Outline view.) Once the outline is completed, save the document. Your master document is done!

Creating Subdocuments

There are two ways to add sub-documents to a master document. The first way to add a subdocument is to create a new one from existing text. First, switch to Outline view and click **Outlining** \rightarrow **Show Document**:



This will display an extra set of subdocuments controls on the Outlining tab. Next, select the headings and/or text that you want to split into subdocuments and click **Outlining** \rightarrow **Create**:

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Outline Tools	Maste	r Document	Close
 SALES REPORT Summary Data Chart MARKETING REPORT PRODUCTION REPORT EXECUTIVE REPORT 		Create Subdocument Create a new subdocument. You cannot embed a subdocume within body text; it must be embedded after a heading. Ensure that Expand Subdocument is turned on before using this feature.	nt :s

The selected text will be turned into a subdocument. Note the light border around the text. Also note the small document icon next to the heading:

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You can also add a subdocument from a separate file. First, place your cursor where you want the subdocument to go. Then, click **Outlining** \rightarrow **Insert**:

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_ •			Insert Subdocument Browse for an existing file to em as a subdocument. You cannot embed a subdocum within body text; it must be embedded after a heading. Ensure that Expand Subdocument is turned on before using this feature.	bed ient nts

(Remember, if you cannot see this command, click Show Document first.)

You will be prompted to choose the subdocument. (Remember that the subdocuments should be saved in the same location as the master document.) Select the subdocument and click **Open**:

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J Travel Books		Executive Report			2020-06-03 2:46	PM Microso
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OneDrive - Velsoft						
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	SALES REPORT Summary Data Chart o							
•	 MARKETING REPORT PRODUCTION REPORT EXECUTIVE REPORT This year was the most profitable yet for Acme Widgets Inc. All teams worked extremely hard to deliver better results than ever. We're happy to give everyone a 10% raise thanks to this year's immense success! 							
∎ ⊕	EXECUTIVE REPORT This year was the most profitable yet for Acme Widg extremely hard to deliver better results than ever. W 10% raise thanks to this year's immense success!	ets Inc. all teams worked e are happy to give everyone α						

The subdocument will then be added to the master document:

Master Document Group

The Master Document group of the Outlining tab offers tools to help you manage master and subdocuments:

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Outline Tools			Master Documen	t	Close

(If you cannot see these controls, click Show Document on the Outlining tab.)

Let us look at its commands.

Command	lcon	Description
Show Document	Show Document	Shows subdocument content and master/subdocument commands.
Collapse Subdocuments	Collapse Subdocuments	Collapse subdocuments so that just the link to it is shown. (This may also hide some commands.) When you click this command, it will turn into Expand Subdocuments.
Create Subdocument	🗅 Create	Create a new subdocument.
Insert Subdocument	🔁 Insert	Insert a file as a subdocument.
Unlink Subdocument	🔁 Unlink	Remove the link to the current subdocument and place the text directly in the master document.
Merge Subdocuments	🕒 Merge	Combine multiple subdocuments into one subdocument.
Split Subdocuments	🖹 Split	Separate the subdocument into two parts at the point of your cursor.
Lock/Unlock Documents	🕒 Lock Document	Lock or unlock master or subdocuments to prevent or enable editing.

Managing Subdocuments

Editing a Subdocument

To edit a subdocument, you can edit it in the master document, or open it in its own window using the document icon in the left-hand margin. To perform this latter task, double-click this small icon:



The subdocument will open in its own Word window:



Moving Subdocuments

To move a subdocument, click and drag the collapsed heading to a new location, just as you would with a regular outline heading:

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Outline Tools		Master Document Close
 ALES REPORT Sales REPORT Summary Data Chart MARKETING REPORT PRODUCTION REPORT EXECUTIVE REPORT This year was the most profitable yextremely hard to deliver better reports and the profit of the parts in the parts in	ret for Acme Widgets Inc. all teams wo esults than ever. We are happy to give ense success!	orked e everyone a
•		

Deleting Subdocuments

Finally, to delete a subdocument, click the document icon to select all of the subdocument's contents:

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With the content selected, press **Delete** on your keyboard to remove the content:

	0
Ð	MARKETING REPORT
٠	PRODUCTION REPORT
Ð	EXECUTIVE REPORT
	 This year was the most profitable yet for Acme Widgets Inc. all teams worked extremely hard to deliver better results than ever. We are happy to give everyone a 10% raise thanks to this year's immense success!
	0
Ð	

Note that the actual document file will not be deleted.

Microsoft 365 Word: Part 3

Unlinking Subdocuments

To remove the link from a subdocument and copy its text into the master document, select the subdocument and click **Outlining** \rightarrow **Unlink**:

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File Outlining Home Insert Draw Design	Layout References Mailings R	eview View Help
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Outline Tools	Master Document	Close
MARKETING REPORT PRODUCTION REPORT	Remove Subdo Delete the link to and copy the sul into the master of	cument o the subdocument bdocument content document.
·		

The subdocument will now be part of the master document:



Activity 3-6: Creating a Master Document

In this exercise, you will create a master document and subdocuments.

1. To begin, open Activity 3-6A from the Activity 3-6 folder in your Exercise Files. This document will be used as the master file:



2. Click View → Outline:

AutoSave 💽 🖁 🥍 🖯		Activity 3-6A -	Saved to this PC 👻	♀ Search		
File Home Insert Dr	aw Design L	ayout Referen	nces Mailings	Review View Help		
Read Print Web Mode Layout Layout	Focus Immersive Reader	Vertical Side to Side	 ✓ Ruler Gridlines Navigation Pane 	Zoom 100%	New Arrange Split Window All	D View Side I D Synchrono
Views	Immersive	Page Movement	Show	Zoom		Window

(If Outline view is already shown, skip to the next step.)

3. Click **Outlining** → **Show Document**, if it is not already selected. This will display extra commands in the Master Document group:

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File Outlining Home	Insert Draw Design	Layout References	Mailings F	Review View	Help
$\ll \leftarrow \boxed{\text{Level 1}} \rightarrow \Rightarrow$ $\land \lor + -$ Outline	One Show Level: All Levels Show Text Formatting Show First Line Only	Show Collapse Document Subdocuments	Close Outline View		

4. This document is already organized into headings. Click the **plus sign** next to Step One to select that section:

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$ \begin{array}{c} \ll \leftarrow \text{Level 1} \qquad \checkmark \rightarrow \twoheadrightarrow \\ & & & & \\ & & & & & \\ & & & & & \\ & & & & & \\ & & & \\ & & & & & \\ & & & & \\ & & & & & \\ & & & & & \\ & & & & \\ & & & & & \\ & & & & & \\ & & & & & \\ & & & & & \\ & &$	- Show Level: All Levels Show Text Formatting Show First Line Only	Show Collaps Document Subdocum	Create Merge Linsert Split Culture Culture Culture Culture Culture Culture Culture Culture C	Close Outline View			
 Step One: Identify the Future State Recording the Data There are a wide variety of templates and tools available to help you track the information gathered during the training analysis process. The tool that you choose will depend on the complexity of your analysis. Here is a simple template that we will work through. 							
⊖ Future State	Current State	Gap	Action Plan				
•							
 The First Step The First step in your analysis process is to identify your future state. What do you want the results to look like when the skills gap has been bridged and training is complete? An easy place to find the ideal future state is to look for competency statements in a job description or job analysis conducted by your HR department. A good future state summary is objective, realistic, and quantitative, just like a competency statement. Case Studies 							
 Gase studies Sample futures contact center, that is further b examples. 	tate/competency stateme for example, could include roken into individual comp	ents for someone working e a general competency st betencies. Let's look at so	g in a tatement me				
5. Click **Outlining** → **Create**:

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File Outlining Home Insert	Draw Design	Layout References	Mailings Review View	v Help
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Outline Tools		Mas	er Document	Close

Now this section will be saved as its own subdocument.

6. Double-click the **plus sign** next to the heading to collapse this subdocument:

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File Outlining Home	Insert Draw Design	Layout References	Mailings Review View	v Help			
$ \begin{array}{c} \ll \leftarrow \ \ \text{Level 1} & \checkmark \rightarrow \gg \\ & \checkmark & \checkmark + - \end{array} $	 ⇒ Show Level: All Levels ✓ <l< td=""><td>Show Collapse Document Subdocument</td><td>Create Defined for the second second</td><td>Close Outline View</td></l<>	Show Collapse Document Subdocument	Create Defined for the second	Close Outline View			
Outline To	ols	Ma	ster Document	Close			
 							
Future State	Current State G	ap	Action Plan				
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•							

Now this section will be saved as its own subdocument.

7. Repeat steps 4 and 5 to create subdocuments for the next two steps in the document:



8. Click to place your cursor at the end of the document, outside of the third sub-document:

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≪ ← E	lody Text → → ^O _O - Show L ✓ Show Te Show Fi	evel: All Levels v ext Formatting rst Line Only [Show Colla Document Subdocu	Create Merge R Insert Split Close Outline View
1	Outline Tools			Master Document Close
	This will help you prioritize action	n items and focus on hig	h-value items.	
0	Sample Project: Improve Respon	se Times to Customer In	quiries	
0	Future State	Current State	Gap	Action Plan
0	Customer e-mail inquiries will be replied to within 24 hours on average	Average response time is 32 hours	e 8 hours	
0	Customer telephone inquiries will be answered within 5 minutes on average	Average hold time is 8 minutes	3 minutes	
0			•	· · · · · · · · · · · · · · · · · · ·
0	Once you have identified the ga to identify causes of the gap. Yo other problem-solving tools to h more information.)	p, you can perform addi u can use the five whys elp you in your investiga	tional interviews technique, SWO1 ition. (See Sessio	and analysis ſ analysis, and n Four for
0	✓ Continuing with our cust	omer service example,	you might gather	the following
	Information. ✓ Review e-mail response	statistics, which show th	nat e-mail inquirie	es are
	responded to within 15 hours or	the weekdays and with	in 40 hours on th	ne weekend.
0	 Review e-mail response 	team staffing levels: 15	members on we	ekdays, 5
•	✓ Review telephone responsive skyrockets to about 12 minutes of average hold time outside of the	onse statistics, which sho during the lunch and shi ese periods is about 4 mi	ow that the avera ft changeover pe nutes.	ge hold time riods. The
0				
_ 0				

9. Click Outlining → Insert:

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File	Outlining	Home	Insert	Draw	Design	Layout	References	Mailings	Review	View	Help
«- (- ^	Body Text	$\rightarrow \gg$	©– Show I ☑ Show T □ Show F	evel: All L Text Format	evels ~ tting nly	Show Document	Collapse Subdocuments	Create	Merge Split Lock Docu	ment	Close Outline View
		Outline	Tools				Mast	er Document			Close

10. Browse to the Activity 3-6 folder in your Exercise Files folder. Select Activity 3-6B and click **Open**:



11. The document will be inserted:

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File	Outlining Home	Insert Draw Design	Layout Referen	nces Mailings Review Vie	w Help
≪ ← [Body Test ▼ → →	Show Level: All Levels ↓ Show Text Formatting	Show Colla	Create Merge	Close
	-	Show First Line Only	Document Subdocu	aments 🕅 Unlink 📴 Lock Document	Outline Vie
	Outline	r Teols		Master Document	Close
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0 0 0 0 0	tep Four: Creat It is now time to creat idea of what resource action plan may be as Somula Project image	te an Action Plan te an action plan to bridge the es are available so that your act ppropriate depending on your y use Resenance Times to Custom	gap. Ensure that you tion plan is realistic. A project. yer innuilles	have a clear multi-phased	
0	Future State	Current State	Gap	Action Plan	
0	Customer e-mail inqu be replied to within 2 on average	iries will Average response 4 hours is 32 hours	time 8 hours	Create e-mail templates about the most frequent inquiries Conduct training on using and customizing these templates	
	Customertelenberg	inquiries Average hold time	ais 8 3 minutes	training Create electronic templates to	
	will be answered with	hin 5 minutes	and annous	replace paper templates	

12. You can see that the inserted subdocument contains two items that are not in the correct order:

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≪ ← B ^ ~ +	ody Text → → [®] - Show L ✓ Show T Show F	evel: All Levels - ext Formatting irst Line Only Do	Show Collap cument Subdocu	Create D Merge Clineert Split See ments W Unlink C Lock Document	Close Outline View
	Outline Tools			Master Document	Close
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• • ● St	The final stage of the process is measures are in place, gather da appropriate to repeat the trainin successfully bridged. The provide the training of the second term of the second second second second idea of what resources are avail action plan may be appropriate <i>Sample Project: Improve Resport</i>	to implement the action p ata and evaluate the new r ng needs analysis to ensur Ction Plan plan to bridge the gap. Er able so that your action pla depending on your project ase Times to Customer Inqu	lan. After the ga netrics. It may a e that the gap h nsure that you h an is realistic. A it t. uiries	ap-reducing Ilso be as been nave a clear multi-phased	
0	Future State	Current State	Gap	Action Plan	
	Customer e-mail inquiries will be replied to within 24 hours on average	Average response time is 32 hours	8 hours	Create e-mail templates about the most frequent inquiries	
0				Conduct training on using and customizing these templates	
				Conduct problem-solving training	
	Customer telephone inquiries will be answered within 5 minutes on average	Average hold time is 8 minutes	3 minutes	Create electronic templates to replace paper templates	
				Conduct training on the new templates	

13. To fix this, click the **plus sign** next to Step Four to select it:

∎ +	St o o o	tep Five: Implement a The final stage of the process is t measures are in place, gather da appropriate to repeat the trainin successfully bridged.	ind Follow Up to implement the action pla ita and evaluate the new m og needs analysis to ensure	an. After the ga netrics. It may a that the gap h	ap-reducing Ilso be as been
	St	ten Four: Create an A	ction Plan		
•	0	It is now time to create an action idea of what resources are availa action plan may be appropriate of Sample Project: Improve Respon	plan to bridge the gap. En able so that your action pla depending on your project. ise Times to Customer Inqu	sure that you h n is realistic. A <i>iries</i>	nave a clear multi-phased
		Future State	Current State	Gap	Action Plan
	0	Customer e-mail inquiries will be replied to within 24 hours on average	Average response time is 32 hours	8 hours	Create e-mail templates about the most frequent inquiries Conduct training on using and customizing these templates Conduct problem-solving training
		Customer telephone inquiries will be answered within 5 minutes on average	Average hold time is 8 minutes	3 minutes	Create electronic templates to replace paper templates Conduct training on the new templates

14. Click and drag Step Four above Step Five to move it to its correct position:



15. The steps will be in the right position. **Click the document icon** to ensure that the subdocument is selected. Then, click **Outlining → Collapse**:

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File	Outlining Home Insert	Draw Design Lay	out Referen	ces Mailings	Review Vie	w Help
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● ● S1 ○ ○ ○	Collapse Collapse the selected item. measures are in place, gather da appropriate to repeat the trainin successfully bridged.	Follow Up nplement the action p ata and evaluate the new ng needs analysis to ensur	lan. After the ga metrics. It may a e that the gap h	ap-reducing Ilso be as been		
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■ ⊕ <u>S</u> 1 ∘	tep Four: Create an A It is now time to create an action idea of what resources are avail	ction Plan n plan to bridge the gap. E able so that your action pl	nsure that you h an is realistic. A	ave a clear multi-phased		
	action plan may be appropriate Sample Project: Improve Respon	depending on your projec nse Times to Customer Ing	t. <i>uiries</i>			
0	Future State	Current State	Gap	Action Plan		
	Customer e-mail inquiries will be replied to within 24 hours on average	Average response time is 32 hours	8 hours	Create e-mail ter about the most f inquiries	mplates frequent	
0				Conduct training customizing thes Conduct problem training	on using and se templates n-solving	
	Customer telephone inquiries will be answered within 5 minutes on average	Average hold time is 8 minutes	3 minutes	Create electronic replace paper te Conduct training templates	c templates to mplates on the new	

16. Now, let us make this document its own subdocument. Click Outlining → Split to do this:

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File Outlining Home Insert Draw Desig	1 Layout References Mailings Review View Help
$ \begin{array}{c c} & \leftarrow & \text{Level 1} & \checkmark & \rightarrow \\ & & & & & & \\ & & & & & & \\ & & & &$	Show Collapse Document Subdocuments Winink Winink
Once you have identified the gap, you can perform additional to identify causes of the gap. You can use the five whys techni and other problem-solving tools to help you in your investigati for more information.) Continuing with our customer service example, you mi following information. Review e-mail response statistics, which show that e- responded to within 15 hours on the weekdays and within 40 Review e-mail response team staffing levels: 15 mem members on the weekend. Review e-telephone response statistics, which show that skyrockets to about 12 minutes during the lunch and shift char average hold time outside of these periods is about 4 minutes .	terviews and analysis ue, SWOT analysis, n. (See Session Four pht gather the nail inquiries are ours on the weekend. sers on weekdays, 5 the average hold time geover periods. The
 Step Four: Create an Action Plan Step Five: Implement and Follow Up The final stage of the process is to implement the action plan measures are in place, gather data and evaluate the new met appropriate to repeat the training needs analysis to ensure the successfully bridged. 	After the gap-reducing ics. It may also be t the gap has been

17. Now collapse Step Five:

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File Outlining Home Insert D $\ll \leftarrow$ Level 1 $\checkmark \rightarrow \Rightarrow$ $\bigcirc -$ Show Level $\land \lor +$ \bigcirc $\bigcirc -$ Show Text F $\bigcirc \odot$ Show First I \bigcirc Outline Tools $\bigcirc \odot$ Show First I	raw Design Layout All Levels Formatting Line Only Th and shift changeover periods. The about 4 minutes	References Mailings Collapse Subdocuments Master Document
Collapse the selected item.	noot + minutes.	
 Step Five: Implement and Follow The final stage of the process is to implement measures are in place, gather data and evalue appropriate to repeat the training needs analy successfully bridged. . 	/ Up t the action plan. After the gap-reduci ate the new metrics. It may also be rsis to ensure that the gap has been	ne

18. The document is now complete. Click **Outlining** \rightarrow **Close Outline View**:



19. Save your work as Activity 3-6 Complete and close Microsoft Word 365 to complete this exercise.

Summary

In this lesson, you learned how to use advanced referencing tools available in Microsoft 365 Word. We discussed how to create and customize an index, table of contents, table of figures, and table of authorities. We also learned how to add cover and blank pages to a document, simplify complex documents using master and subdocument features, and create document outlines.

LESSON 4: SECURING A DOCUMENT

Lesson Objectives

In this lesson you will learn how to:

- Suppress information
- Set editing restrictions
- Add a digital signature to a document
- Restrict document access

TOPIC A: Suppress Information

You have spent a lot of time creating that perfect document and you are ready to distribute it to others. Before you send it, you should make sure that it is really ready to be circulated. Microsoft 365 Word contains polishing tools to make sure your document only contains the information that you want others to see.

Topic Objectives

In this session, you will learn:

- How to suppress sensitive information in a document
- How to format text as hidden
- How to remove personal information from a document
- How to use the Document Inspector

Suppress Sensitive Information

There are a few ways to control how sensitive information is displayed. You can format it as hidden text so that the information is still accessible but not automatically shown. Or, you can remove it from the document entirely so there is no chance of it being accessed.

Hidden Text

You can format text as hidden using the Font dialog box. To start, select the text that you want to hide. Then, click the option button in the Font group of the Home tab or use the **Ctrl + D** shortcut:



The Font dialog box will open. Check the "Hidden" box and click OK:

			<u>.</u>		
Font:		Font style:	<u>Size:</u>		
+Body		Regular	11		
+Body		Regular A	8		
+Headings		Bold	10		
Abadi Extra Light		Bold Italic	11		
Adobe Arabic		✓	12 🗸		
Font <u>c</u> olor:	Underline st	/le: Underline	e color:		
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Stri <u>k</u> ethrough Doub <u>l</u> e strikethrou Su <u>p</u> erscript Su <u>b</u> script	gh	-	S <u>m</u> all caps		
Preview					
Our financial proje	ections show th	hat the company v	will be making	gover	a m
	fact The surrout		fin en utriste form		
This is the body theme	ront. The current	accument theme de	erines which for	t will be	: us

The text will now be hidden. You can view it, however, by turning formatting marks on:

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File Home Insert Draw D	esign Layout References	Mailings Review	View Help)			t	🖻 Share 🛛 🖓	Comme	nts
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Business-Overview¶ ZoomFoods [®] X <u>E</u> ." <u>ZoomFoods</u> " ∳will-prepare-and-distribute-pre- packaged <u>K</u> <u>E</u> ." <u>Pre-packaged</u> " ∳rozen, gourme <u>t</u> <u>X</u> <u>E</u> . " <u>BroductGourmet</u> " ∳meals-that-are-sold-in-grocery-stores. Consumers can then-purchase-the-meals-and-reheat-them-at- home.¶			Our-Vis ¶ To-be-the leader-in-	•world• healthy,•						
N - - - -	Our-financial-projections-sh making-over-a-million-dolla ¶	iow-that-the-company-wil rs-in-profit-in-three-years.	ill∙be∙ 5.¶	high-qual packaged solutions.	lity, pre- I-meal- ¶		I			

You can choose to always display hidden text and/or to print it via the **Display** category of the Word Options dialog box:

Word Options	?	×
General Change how document content is displayed on the screen and when printed.		
Proofing Page display options		
Save Save Show white space between pages in Print Layout view ①		
Language I Show highlighter marks ①		
Ease of Access Show document tooltips on hover		
Advanced Always show these formatting marks on the screen		
Customize Ribbon \Box <u>Tab characters</u> \rightarrow		
Quick Access Toolbar		
Add-ins		
Trust Center		
✓ Object anchors		
Show all formatting marks		
Printing options		
✓ Print drawings created in Word ①		
Print <u>b</u> ackground colors and images		
Print document properties		
Indete fields before printing		
Update linked data before printing		
ОК	Can	cel

Remove Personal Information from a Document

In Lesson 1, we learned that Microsoft Word stores a lot of information about a document in the file itself. You can view and modify this information from the Info category of Backstage view, and from the Properties dialog box (accessible by clicking **Properties** –> Advanced Properties):

	ZoomFoods	John Smith 💵 🙂 🙁 ? — 🗆
e	Info	
☐ Home □ New	ZoomFoods Desktop » Word Files » Sample Files	
▷ Open	GO Upload Bha ZoomFoods Properties ? X	
Info	General Summary Statistics Contents Custom	Properties ~
Save	Protect Document - Subject: Business Overview	Size 88.8KB Pages
Save As	Author: Windows User Manager:	Words 392 Total Editing Time 1279 Minutes
Print	Insp Company: Before	Title ZoomFoods - Business Ov Tags Add a tag
Share	Check for D Category:	Comments Add comments
Export	C Comments:	Related Dates
Close	Vers Hyperlink	Created 2015-07-06 1:55 PM Last Printed
	Version History	Related People Author Windows User
	Manage Document ~	Add an author Last Modified By
Account		Related Documents
Feedback		Open File Location
Options		Show All Properties

You can remove information from these fields as desired.

The Document Inspector Dialog Box

The Document Inspector can browse a document and search for personal information that may be hidden to you. This includes information about the computer used to create the document, your own personal information, custom XML data, and hidden text or text elements.

	ZoomFoods	John Smith 🖪 🙂 😩 ? — 🗆 🗙
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ሰ Home		
New	ZoomFoods Decision - Ward Filer - Sample Filer	
	슈 Upload 🖻 Share 🕑 Copy path 🗁 Open file location	
Info	Drotect Desument	
	Control what types of changes people can make to this document.	Size 00 0KP
Save	Protect Document ~	Pages 9
Save As		Words 392
		Total Editing Time 1282 Minutes
Print	Inspect Document	Title ZoomFoods - Business Ov
Share	Before publishing this file, be aware that it contains:	Tags Add a tag
	Issues ~ Characters formatted as hidden text	Comments Add comments
Export	Inspect Document	Related Dates
Transform	Check the document for hidden properties or personal information.	Last Modified 2020-06-03 11:02 AM
-	Cherk Accessibility	Created 2015-07-06 1:55 PM
Close	Check the document for content that people	Last Printed
		Related People
	Check for features not supported by earlier	Author Will Windows Usor
	versions of Word.	Windows oser
	Manage Document	Add an author
	Manage	Last Modified By
	Document ~	
Account		Related Documents
Constanting of the set		Open File Location
Peedback		
Options		Show Ail Properties

To begin, click **File → Info → Check for Issues → Inspect Document**:

You will be instructed to save the file if you have not already done so:

Microsof	it Word	<
?	Before you use Document Inspector Make sure you save your changes because the Document Inspector might remove data that can't be restored later. Do you want to save your file now?	
	Yes No	

Then, the Document Inspector will open. Here, you can choose which elements the Document Inspector should look for. By default, all types of personal information will be inspected. Click the **Inspect** button:

Document Inspector ?	×
To check the document for the selected content, click Inspect.	
Comments, Revisions, and Versions Inspects the document for comments, versions, and revision marks.	^
Document Properties and Personal Information Inspects for hidden metadata or personal information saved with the document.	
✓ Task Pane Add-ins Inspects for Task Pane add-ins saved in the document.	
Embedded Documents Inspects for embedded documents, which may include information that's not visible in the file.	
Macros, Forms, and ActiveX Controls Inspects for macros, forms, and ActiveX controls.	
Ink Inspects the document for Ink.	
Collapsed Headings Inspects the document for text that has been collapsed under a heading.	~
	ose

After a moment, anything the Document Inspector finds will be listed. Details of the data are also shown, as well as the option to remove any personal information. Click **Remove All** to remove the items found by the inspector in each category:

Docu	ment Inspector	?	×
Review	w the inspection results.		
\bigcirc	Comments, Revisions, and Versions No items were found.		^
j	Document Properties and Personal Information The following document information was found: * Document properties * Author	Remove Al	-
\odot	Task Pane Add-ins We did not find any Task Pane add-ins.		
i	Embedded Documents Embedded documents, which may include information that's not visible in the file, were found. We can't remove these for you. After you remove them, inspect the file again.	More Info	
Ø	Macros, Forms, and ActiveX Controls No macros, forms, or ActiveX controls were found.		
\oslash	Collapsed Headings No collapsed headings were found.		
<u>^</u> 1	lote: Some changes cannot be undone. <u>R</u> einspe	ect <u>C</u> le	→ ose

If you do choose to remove any personal data, we recommend that you run the Document Inspector again to ensure that everything you want removed is taken care of.

Tracked Changes Security Issues

Tracked changes can cause serious problems if the user is not aware that their changes are being tracked. Imagine that someone inappropriately modifies financial information in a prospectus or deletes a disclaimer in a contract. If these changes are tracked, these actions could have legal consequences.

If you want to be reminded when a document contains tracked changes, you can set this option in the Trust Center on a document-by-document basis. First, open the Word Options dialog box to the Trust Center category. Then, click the **Trust Center Settings** button:

Word Options		2	?	\times
General	Help keep your documents safe and your computer secure and healthy.			
Display				
Proofing	Security & more			
Save	Visit Office.com to learn more about protecting your privacy and security.			
Language	Microsoft Trust Center			
Ease of Access	Microsoft Word Trust Center			
Advanced				
Customize Ribbon	The Trust Center contains security and privacy settings. These settings help keep your computer secure. We recommend that you do not change these settings.	<u>T</u> rust Center Se	ttings	
Quick Access Toolbar			ι	~5
Add-ins				
Trust Center				
<u> </u>				
		OK	Cance	el

The Trust Center will open. Click the **Privacy Options** category and check the option relating to tracked changes:

Trust Center		?	×
Trusted Publishers Trusted Locations Trusted Documents Trusted Add-in Catalogs Add-ins	Privacy Options Privacy Settings Read our privacy statement View Diagnostic Data		
ActiveX Settings Macro Settings Protected View Message Bar File Block Settings Privacy Options Form-based Sign-in	Document-specific settings Warn before grinting, saving or sending a file that contains tracked changes or comments Store random numbers to improve Combine accuracy ① Make hidden markup visible when opening or saving Remove personal information from file properties on save ① Document [nspector] Research & Reference Translation Options Research Options		
	OK	Ca	ncel

Click **OK** in all open dialog boxes to save this change.

Activity 4-1: Suppressing Information

In this activity, you will test the capabilities of the Document Inspector.

1. Open Microsoft Word 365 and open Activity 4-1:



2.

First, let us mark some text as hidden. Select the words "**(Myers-Briggs Type Indicator)**" in the second sentence on the first page. Click the option button in the Font group of the Home tab:



3. Check the "**Hidden**" box and click **OK**:

Fo <u>n</u> t Ad <u>v</u> anced					
Eont: +Body +Body +Headings Abadi Abadi Extra Light Adobe Arabic Font <u>color</u> : <u>U</u> nderline st Automatic <u>U</u> nderline st (none) Effects Strikethrough Double strikethrough Superscript Subscript Preview	Font style: Size: Regular 11 Regular 11 Bold 9 10 10 Bold 11 12 12 yle: Underline color: Automatic Small caps All caps Hidden				
(Myers-Briggs Type Indicator) This is the body theme font. The current document theme defines which font will be used.					
Set As <u>D</u> efault Text <u>Effects</u>	OK Cancel				

4. The text will now be marked as hidden. Click Home \rightarrow Show/Hide to see it:



 Now, let us run the Document Inspector. <u>Before we do this, save your document</u> as Activity 4-1 Complete.



6. Click File → Info → Check for Issues → Inspect Document:

7. The Document Inspector will open. Ensure that all items are checked and click Inspect:

Document Inspector	?	×
To check the document for the selected content, click Inspect.		
✓ <u>Macros, Forms, and ActiveX Controls</u> Inspects for macros, forms, and ActiveX controls.		^
Inspects the document for Ink.		
Collapsed Headings Inspects the document for text that has been collapsed under a heading.		
Custom XML Data Inspects for custom XML data stored with this document.		
Headers, Footers, and Watermarks Inspects the document for information in headers, footers, and watermarks.		
Invisible Content Inspects the document for objects that are not visible because they have been for as invisible. This does not include objects that are covered by other objects.	ormatted	
Hidden Text Inspects the document for text that has been formatted as hidden.		~
Inspect	<u>C</u> lo	ose

8. Scroll down to the bottom of the dialog box. Click **Remove All** next to the Hidden Text entry:

Document Inspector	?	Х		
Review the inspection results.				
No macros, forms, or ActiveX controls were found.		^		
Ink uas found	Remove All			
Collapsed Headings No collapsed headings were found.				
Custom XML Data Custom XML data was found.	Remove All			
Headers, Footers, and Watermarks The following items were found: * Headers * Footers Headers and footers may include shapes such as watermarks.	Remove All			
Invisible Content No invisible objects found.				
Hidden Text Hidden text was found.	Remove All	3 🗸		
Note: Some changes cannot be undone.	<u>R</u> einspect <u>C</u> lose			

9. The other items can be left in the document. Click Close:

Docu	ment Inspector		?	×
Review	w the inspection results.			
	No macros, forms, or ActiveX controls were found.			^
İ	Ink Ink was found	Remo	ve All	
\odot	Collapsed Headings No collapsed headings were found.			
İ	Custom XML Data Custom XML data was found.	Remo	ve All	
ļ	Headers, Footers, and Watermarks The following items were found: * Headers * Footers Headers and footers may include shapes such as watermarks.	Remo	ve All	
\odot	Invisible Content No invisible objects found.			
\odot	Hidden Text No hidden text was found.			~
<u>^</u> 1	Note: Some changes cannot be undone.	<u>R</u> einspect	<u>C</u> lose	R

10. Back in the document, you can see that the hidden text has been completely deleted:

AutoSave 💽 Off	日 り ひ マ Activ	ty 4-1 Complete 👻				John Smith	ZL	œ –		×
File Home	Insert Draw Design La	out References	Mailings Review	View Help			ť	3 Share	🖓 Comme	nts
Paste V III III III IIII IIII IIIII IIIIIIII	n MT (Bot \sim 11 \sim $A^{*} A^{*}$ $Aa \sim$ $\underline{U} \sim ab x_{2} x^{2}$ $\underline{A} \sim \underline{\mathscr{P}} \sim \underline{A}$	A> I≣ - I≣ - V≣ - - I≣ = = = t		o AaBi AaBbCcD AaBb Default Bu Important 1 Nor	CcDi AaBbCcDi v mal 1 No Spac v	OFind → cReplace Select →	Dictate	Sensitivity	Editor	
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	Leadership Ass - WHAT'S - ASSESSING 1 There are mo use initials or of that we prefe been substan questionnaire	essment¶ • YOUR• TYPI G• YOUR• PREFEF • MBTI,colors III • MBTI,colors III • MBTI,colors III • MBTI,colors III • The science - behin forted - through+ense • .*T	E?·HOW·A[RENCES·¶ herpersonality-typ cerPersonality-typ cerPersonality-time derthis-kind-of-asse of-thousands-of-pe	B BOUT-MINE?-¶ es of people that we work ensions, eductionment like. T re are base temperament ssment relates back to the ople-who-have-completed	s and play with. Whe rue Colors, the name work of Carl Jung. It and validated	sther you srof- o, and -has-		7		*

11. Save your document as Activity 4-1 Complete. Close Microsoft 365 Word to complete this activity.

OPIC B: Set Editing Restrictions

Another way to protect sensitive information is by restricting the editing that can be done to a document. In this topic, we will learn about the central tool that is used to accomplish this: The Restrict Editing task pane. Then, we will learn how to mark a document as final.

Topic Objectives

In this session, you will learn:

- How to use the Restrict Editing task pane
- About Protected View
- How to mark a document as final

The Restrict Editing Task Pane

To open the Restrict Editing task pane, click **Review** → **Protect** → **Restrict Editing**:

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Proofing	Speech	Accessibility	Language		Comments			Tracking	l Si	Changes	Compare	Protect	ଟି Ink	Resume	

Then, you will see the **Restrict Editing** task pane appear on the right-hand side of the window:



There are three steps to this task pane. You can choose any options in Step 1 and/or 2, and then finalize your choices with Step 3.

The first step lets you **limit formatting to a certain set of styles**. Click the Settings link to open the Formatting Restrictions dialog box:



The Formatting Restrictions dialog box will open:

Formatting Restrictions	7	?	×
Styles Limit formatting to a selection of styles By restricting formatting to the styles you sel ability to modify styles and the ability to app document. Select the styles you want to allow document. Checked styles are currently allowed:	lect, you preve ly direct forma w to be used i	ent the atting to n this	o the
✓ 1/1.1/1.1.1 ✓ 1/a /i ✓ Article / Section ✓ Balloon Text (recommended) ✓ Bibliography (recommended) ✓ Block Text (recommended) ✓ Body Text (recommended) ✓ Body Text 2 (recommended) ✓ Body Text 3 (recommended)			
A <u>I</u> I <u>R</u> ecommended Minimum	<u>N</u> one	2	
Formatting Allow AutoFormat to override formattin Block Theme or Scheme s <u>w</u> itching Bloc <u>k</u> Quick Style Set switching	g restrictions 3 OK	Cance	:1

In the **top part of the dialog box (1)**, you can check styles that you want to be used in the document and uncheck those that you do not want used. You can also click the **All, Recommended**

Minimum, or **None buttons (2)** to check all styles, a minimum number of suggested styles, or no styles, respectively.

The bottom of the dialog box also offers you **options** to enable or disable AutoFormat, schemes, themes, and style sets **(3)**. Once you have put your restrictions in place, click the **OK** button to apply them.

Via a drop-down menu, Step 2 of the Restrict Editing task pane lets you allow only certain types of editing to occur in the document:

Restrict 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 allowed to 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

Depending on the option you choose, you may have additional options to specify. For example, if you choose "Filling in forms" you will have the option to unprotect certain sections in the document. If you choose "No changes (Read only)" or Comments, you will be allowed to set exceptions for these rules. (This exception list is most effective when sharing a document on a network because it allows you to specify users who will be able to freely edit the document.)

Once you are finished setting your restrictions, click the button in Step 3: **Yes, Start Enforcing Protection**.

Restrict Editi 🍷 🛛 🗙
1. Formatting restrictions
 Limit formatting to a selection of styles
Settings
2. Editing restrictions
Allow only this type of editing in the document:
Tracked changes 🔻
3. Start enforcement
Are you ready to apply these settings? (You can turn them off later)
Yes, Start Enforcing Protection

You will then see this dialog box:

Start Enforcing Protection	?	×			
Protection method					
Password					
(The document is not encrypted. Malicio the file and remove the password.)	us users c	an edit			
Enter new password (optional):					
Reenter <u>p</u> assword to confirm:					
O User authentication					
(Authenticated owners can remove document protection. The document is encrypted and Restricted Access is enabled.)					
OK	Ca	ncel			

The **Start Enforcing Protection** box offers two protection methods. If you are going to share the document with people outside of your organization's network, we recommend that you set a password. This allow certain users, with whom you share the password, to remove document protection. You can leave this field blank if you do not want to apply a password. However, without a password, anyone can unprotect the document and edit it.

If you are on a network, you can protect your document by user authentication. Talk to your system administrator to see if this option can be made available for your organization.

Once you set your authentication options, click **OK** to apply them:

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Editor Thesaurus Word Count	Check Accessibility Translate Language New Delete Show Comment	mments Changes ~ Track	Rest Previous Accept Next Next Next Next Next Next Next	rict Hide Resume Ink Assistant
Proofing Speed	Accessibility Language Comments	Tracking 🖓	Changes Compare Protect	Ink Resume A
	Business Overview ZoomFoods will prepare and distribute pre-package gournet meals that are sold in grocery stores. Cons then purchase the meals and reheat them at home.	d, frozen, immers can To be the world leader in healthy, high-quality, pre- packaged meal solutions.		Restrict Texture X Your permissions This document is protected from unintentional editing. You may cell in this region, but all changes will be tracked. You may climat text only with certain styles
Page 3 of 9 392 words	[]) English [United States] 🐻 伐 Accessibility: Investigate		D. Focus III III	Stop Protection

Document restrictions can be turned off with the **Stop Protection** command in the Restrict Editing task pane:

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File Home Ins	ert Draw Design Layout References N	Mailings Review View	Help			암 Share 🛛 Comments
Editor A Thesaurus Rear Word Count Alou	Check Accessibility	Previous Next Track Changes	Simple Markup * Show Markup * Reviewing Pane *	Reject V Previous Next V Compare	Block Authors - Restrict	Hide Resume Ink ~ Assistant
Proofing Spee	h Accessibility Language Co	mments	Tracking 🕞	Changes Compare	Protect	Ink Resume A
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 π /ul>	Business Overview ZoomFoods will prepare and distribute p gourmet meals that are sold in grocery s then purchase the meals and reheat the	ore-packaged, frozen, tores. Consumers can m at home.	Our Vision To be the world leader in healthy, high-quality, pre- packaged meal solutions.			ur permissions his document is protected from nintentional actifute, ou may edit in this region, but all hanges will be tracked. ou may format text only with ertain styles. valiable styles
Page 3 of 9 392 words	English (United States) G (Accessibility: Investigation	ite		(D) Focus		- + 100%

If document protection was applied using a password, the user will be prompted to enter it before the action will be completed. If no password was applied, the document will be immediately unprotected.

Protected View

When you open documents from potentially dangerous locations, such as the internet, Microsoft Word will open that file in a special mode called **Protected View**:



This prevents malicious content from running and protects your computer. If you trust the file, click Enable Editing on the Message Bar to begin working with it. Otherwise, click **File** \rightarrow **Close** to close the file.

To modify the settings for this feature, open the Word Options dialog box to the Trust Center category. Then, click the **Trust Center Settings** button:



In the Trust Center, you will see a category for **Protected View**:

ist Center	?	
rusted Publishers	Protected View	
rusted Locations rusted Documents rusted Add-in Catalogs	Protected View opens potentially dangerous files, without any security prompts, in a restricted mode to help minimize harm to your computer. By disabling Protected View you could be exposing your computer to poss security threats.	ible
ActiveX Settings	✓ Enable Protected View for Mes located in potentially disarce jocations	
Aacro Settings		
rotected View		
lessage Bar		
le Block Settings		
ivacy Options		
orm-based Sign-in		
	OK .	Canc

Set your options as desired and click **OK** in all open dialog boxes to save your changes.

Mark as Final

Once you have completed a document, the last thing you want is someone to accidentally change something! That is where the Mark as Final command can come in handy. This command puts editing restrictions on the document without going as far as adding a password.

To mark a document as final, click File \rightarrow Info \rightarrow Protect Document \rightarrow Mark as Final:



You will be warned of the action you are about to take. Click **OK**:



Another explanation will appear stating that some commands are now turned off. Click **OK** to dismiss this dialog box:

Microso	ft Word X
1	This document has been marked as final to indicate that editing is complete and that this is the final version of the document. When a document is marked as final, the status property is set to "Final" and typing, editing commands, and proofing marks are turned off. You can recognize that a document is marked as final when the Mark As Final icon displays in the status bar. Don't show this message again

When you click OK, the document will be marked as final. Backstage view will still be displayed. Click the back arrow to return to the document:

	ZoomFoods - Read-Only - Saved to this PC	John Smith 🗾 🙂 🙁 ? — 🗆 🗙
e,	Info	
G Home □ New	ZoomFoods	
⊡ Open	Oestop = Word Hies = Sample Files Open file location	
Info Save Save As	Protect Document Protect Document This document has been marked as final to discourage editing. Pages Words	31.0KB) 991
Print Share	Total Editing Time 2 Inspect Document Field Refore publishing this file, be aware that it contains: Tage Refore publishing this file, be aware that it contains: Refore publishing this file, be aware that it contains: Tage Refore publishing this file, be aware that it contains:	2 Minutes Vone Vone
Export Transform	Document properties and author's name Characters formated as hidden text Canacters formated as hidden text Content that people with disabilities are unable to read Last Modified Created	faday, 2:30 PM faday, 2:30 PM
Close	Version History Last Printed View and restore previous versions. Related People Author	John Smith
	Manage Document Last Modified By There are no unsaved changes. Related Document Related Document	3 John Smith
Account	Open File Locat	tion
Feedback	Show All Properties	
Options		

Back in the document, you will see the Marked as Final status in the Message Bar and the status bar. As well, the document will now be read-only:

AutoSave 💽 🗒 🏷 🔻 ZoomFoods - Read-Only - Saved to this PC + 👂 Search		John Smith 🛛 🥵	53	
File Home Insert Draw Design Layout References Mailings Review View	/ Help		🖻 Share	Comments
MARKED AS FINAL An author has marked this document as final to discourage editing. Edit Anyway				×
	3			
1				
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	Zeeve			
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	Rusiness			
Page 1 of 9 391 words 🔃 English (United States) 🜔 🐻 🕀 Accessibility: Investigate	(D) Focus			+ 144%

Note that you can easily remove this status by clicking "Edit Anyway" in the Message Bar.

Activity 4-2: Setting Editing Restrictions

In this activity, you will restrict editing in a questionnaire.

1. Open Microsoft Word 365 and open Activity 4-2:



2. Click Review → Restrict Editing:

AutoSave 💽 o		୨~ଅ ⊽	Activity 4-2 - Save	d to this PC + 🖉 Search		John Smith 🛛 🗾	0 -	- 0	×
File Home	Insert	Draw	Design Layout	References Mailings Review	View Help		🖻 Share	🖵 Comment	ts
Editor Editor Thesaurus	A)) Read Aloud	Check Accessibility	Translate Language	New Delete Somments	Track Changes → IP Reviewing Pane → Accept	Compare Block Rest Compare Authors - Edit	rict Hide	Resume Assistant	
Proofing	Speech	Accessibility	Language	Comments	Tracking 😼 Chan	nges Compare Protect	اچ Ink	Resume	~

3. The Restrict Editing task pane will open. **Check the box in Step 2** and choose "**Filling in forms**" from the drop-down menu:

Au	toSave 💽 01		ି ଅ ⇒		Activity 4	-2 -	, P si	earch						John Smith	ZL	••	- 0	×
File	Home	Insert	Draw	Design	Layout	References	Mailings	Review	View	Help						🖻 Share	🖓 Comr	ments
A Er E T T	ditor nesaurus 'ord Count	A)) Read Aloud	Check Accessibility	ع م Translat	A Language	New Comment	Delete	ous v Comments	Track Changes	Simple Mar Show Marku Reviewing P	kup ¥ Jp ¥ 'ane ¥	Accept	Compare *	Block Authors	Restric	t Hide	Resume Assistan	e
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3. Start enforcement If you have ever wondered what type of person – or temperament – makes the best type of leader, the answer may surprise you. It's not necessarily the person that achieves the greatest success (however you define that), nor is it necessarily the person with the greatest communication skills. The keys to being the best type of leader have to do with many things, including the way you approach work and life, and also in having a strong team that can offer a range of strengths.								ement to apply thes can turn ther orcing Protect	e n off ttion									

4. Click Yes, Start Enforcing Protection in the task pane:

Restrict Editi 👻 🗙							
1. Formatting restrictions							
Limit formatting to a selection of styles							
Settings							
2. Editing restrictions							
Allow only this type of editing in the document:							
Filling in forms 🔻							
3. Start enforcement							
Are you ready to apply these settings? (You can turn them off later)							
Yes, Start Enforcing Protection							
5							

5. Click **OK** to start enforcing protection without applying a password:

Start Enforcing Protection	?	\times
Protection method		
Password		
(The document is not encrypted. Malicion the file and remove the password.)	us users o	an edit
Enter new password (optional):		
Reenter <u>p</u> assword to confirm:		
O User authentication		
(Authenticated owners can remove docu The document is encrypted and Restricte enabled.)	ment pro d Access	tection. is
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6. Your changes will be reflected in the Restrict Editing task pane. Click the **File** tab:

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File Home	Insert Draw	Design Layout	References Mailings	Review Vi	ew Help						ය Share		ents
Editor Thesaurus	Read Aloud Accessibili	Translate Language	New Delete Show	Comments CH	Track	ne ~	Accept	Compare	Block Authors	Restric	t Hide	Resume Assistant	
Proofing	Speech Accessibili	y Language	Comments		Tracking	5	Changes	Compare	Pro	tect	Ink	Resume	· ^
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ASSESS There are use initial True Cold that we c work of C validated	ASSESSING YOUR PREFERENCES There are many ways to discuss the personality types of people that we work and play with. Whether you use initials like the MBTI (Myers-Briggs Type Indicator), colors like Personality Dimensions, edutainment like True Colors, the names of animals, or Greek philosophers, the idea is that there are base temperaments that we can relate to, and that we prefer. The science behind this kind of assessment relates back to the work of Carl Jung. It has been substantiated through tens of thousands of people who have completed and validated questionnaires.												
If you have ever wondered what type of person – or temperament – makes the best type of leader, the answer may surprise you. It's not necessarily the person that achieves the greatest success (however you define that), nor is it necessarily the person with the greatest communication skills. The keys to being the best type of leader have to do with many things, including the way you approach work and life, and also in having a strong team that can offer a range of strengths.													
Some per for advic learning one stren	ople seem to b e and mentors and working o gth of a leade	e natural leaders of nip. Others seem to a developing their r is their continuing	with an enviable trac have to work at it, skills. In reality, all le drive to learn.	k record and and are cons aders need	lots of people tu tantly looking to t to work at someth	rning to he world ing, bed	them d for cause			s	top Protectio	n	
Page 1 of 9 954 wo	rds 💭 English (Jnited States) 😨 🖓 A	ccessibility: Investigate				(D)	Focus 🖽		- 6		+	134%

7. You will also see the changes in the Info category:



Now, let us mark the document as final. Save it as Activity 4-2 Complete before proceeding. Then, click File → Info → Protect Document → Mark as Final:



9. Click **OK** to confirm the operation:



10. Microsoft Word will then explain what the Mark as Final process entails. Read this information and then click **OK** to continue:



11. When you click OK, the document will be marked as final. Backstage view will still be displayed. Click the back arrow to return to the document:

	Activity 4-2 Complete - Read-Only - Saved to this PC							
e	Info							
က် Home	Activity 4-2 Complete Desktop » Word Files » Exercise Files » Lesson 4							
🗋 New								
🗁 Open	슈 Upload In Share Ocopy path Dependie location							
Info	Protect Document							
	Protect Certain types of changes are restricted in this document.							
Save As	Document *							
12. You will see the Mark as Final status in several places in the document:



13. Close Microsoft 365 Word to complete this activity.

TOPIC C: Add a Digital Signature to a Document

Digital certificates and digital signatures are crucial tools for verifying a document's authenticity and security. In this topic, you will learn how to digitally sign a document.

Topic Objectives

In this session, you will learn:

- About digital signatures and digital certificates
- About the signature line available in Microsoft 365 Word
- How to digitally sign a document
- How to use the Signatures task pane
- About requested versus valid signatures

Digital Certificates

Anyone can obtain a **digital certificate** that verifies their identity and helps to secure documents. Most commonly, these certificates are issued through a third-party authority.

Digital Signatures

Once you have a digital certificate, you can apply **digital signatures** to your document. Digitally signing your document is like signing a check or a legal document: the signature confirms your identity. For electronic documents, it also provides reassurance to the recipient that the document really came from you.

The Signature Line

A **signature line** can work in one of two ways. It can be used as a way for someone to physically sign a printed page, or it can work in conjunction with a digital signature.

To add a signature line to your document, click in the document wherever you would like the signature line to appear. Then, click **Insert** \rightarrow **Signature Line**:

AutoSave 💽 Off		• ⁽) =	Signed Letter - Save	ed to this PC	. 🦻) Search							John Smith 🗾 🖪	- 0	×
File Home	Insert	Draw Design	Layout Referen	ices Mai	lings Review	View I	Help						ල් S	hare 🛛 🖓 Com	ments
Page ~ Blank Page Page Break	Table	Pictures v Ø D Models	SmartArt	Add from Files ~	Get Add-ins	W Wikipedia	Online Video	⊗Link ~ □ Bookmark □⊡ Cross-reference	Comment	Header ~ Footer ~	Text Box → All Dro	ck Parts ∽ rdArt ∽ p Cap ~	 ➢ Signature Line ▼ ➢ Date & Time ➢ Object ▼ 	∏ Equation ↓ Ω Symbol ↓	
Pages	Tables	bles Illustrations Content Add-ins Media Links Comments Header & Footer Ter												Symbols	
E 7				E E E E E E E E E E E E E E E E E E E	mily Bollinger 334 Sycamore For at Lauderdale, FL ear Emily, want to reach out ur team is here to formation sheet tptions. a thank-you, fd doe LOVEWDGET hipping too. nccreily, shn Smith EO	k road 33309 to you perso help you w hat came pa like to offer 5. If you use	2 · · · · · ·	nank you for joining ti d wherever you nees th your widget for yo ff of your next purch in the next two week	4 • • • • • • • • • • • • • • • • • • •	gets family. to the ed help the promo in free			Add a Signature Line Inset a signature line the individual who m Insetting a digital sign that you obtain a digi one from a certified h partner.	that specifies ist sign. ature requires al ID, such as icrosoft	

You will then be prompted to enter information for the person who will sign the document. Once you are finished, click **OK** to insert the signature line:

Signature Setup	?	\times
Suggested signer (for example, John Doe):	
John Smith		
Suggested signer's <u>t</u> itle (for example, Mar	nager):	
CEO		
Suggested signer's <u>e</u> -mail address:		
jsmith@acmewidgets.onmicrosoft.com		
Instructions to the signer:		
Before signing this document, verify that you are signing is correct.	the co	ntent
Allow the signer to add <u>c</u> omments in t	the Sigi	n dialog
Show sign <u>d</u> ate in signature line		
OK Cancel		

The signature line will then be inserted:

AutoSave 💽 Off		≂ び ≂	Signed Let	ier -	♀ Search							John Smith	JS E	- E	o x
File Home	Insert	Draw Design	Layout Referen	ces Mailir	ngs Review View	Help							ය s	ihare 🛛 🖓 C	omments
Cover Page ~ Blank Page Page Break	Table	Pictures * Ø 3D Models	SmartArt	Add from Files ~	Get Add-ins ₩ Wikipedia	Online Video	 Cink ✓ Bookmark Cross-reference 	Comment	Header ~ Footer ~ Page Number ~	Text Box → A≡ Dr	iick Parts ~ ordArt ~ op Cap ~	· ∑ Signat ⊡ Date 8 ⊡ Object	ure Line 👻 Time V	∏ Equation Ω Symbol •	
Pages	Tables	Illustrati	ons	Content	Add-ins	Media	Links	Comments	Header & Footer		Ter	xt		Symbols	~
E - - - - - - - - - - - - -	words T	Fourth Diales Sales		ACC 873 I 5/: 5/: For De I W OU OU OU OU OU Sin	CMEE WIDGEE ROMINES MILL ROAD, PI 7/2020 ³⁴ Sycamore Fork road rt Lauderdale, FL 33309 ar Emily, and to reach out to you persors in team is here to help you wi ormation sheet that came pa tions. a thank-you, rd like to offer- de LOYEWIDGETS. If you use pring too. 	CTS 1 ANO, TZ 3 ANO, TZ 3	INCC. 575074 hank you for joining ti nd wherever you nees th your widget for yo ff of your next purchi in the next two week	4 · · · · · ·	gets family. to the ed help he promo in free				5		+ 1005

Digitally Signing a Document

Once a signature line has been inserted, the user can double-click it to sign the document. (If there is no signature line, they can click **File** \rightarrow **Info** \rightarrow **Protect Document** \rightarrow **Add a Digital Signature** to manually launch the process.)

If they do not have a digital ID, they will be prompted to get one. They must click Yes to proceed:



Once the user has a digital ID, the Sign dialog box will be displayed when the signature line is double-clicked. Here, the user can type their name and click **Sign** to complete the process:

Sign	?	×										
(i) See additional information about what you are signing												
Before signing this document, verify that the content you are signing	ng is correc	rt.										
Type your <u>n</u> ame below, or click Select Image to select a picture to use as your signature:												
John Smith, CEO	Select Ima	age										
To include information about the signer, click the details button.	<u>D</u> etails	5										
Signing as: ACME Widgets Inc.Sign	C <u>h</u> ang	e										
Sign	Car	ncel										

Then, the user will see more details about what the signing process does to the document:



Clicking **OK** will return the user to the document, which has now been marked as final. They will also see a notification that the document contains digital signatures:

AutoSave Off	9· U ₹	Signed	Letter - Saved to thi	PC •	9	Search							John Smith	JS 🎫	- c	s ×
File Home In:	sert Draw Desig	n Layout	References Ma	ilings Review	View	Help	Kindle	Table Design	Layout					යි Sha	re 🛛 🖓 Co	mments
() MARKED AS FINAL	An author has marked thi	is document as fina	I to discourage editir	g. Edit Anyway												×
i SIGNATURES	This document contains	valid signatures.	View Signatures													×
				CME WID ROMINES MILL ROA (7/2020 mily Bollinger 334 Sycamore Fork ort Lauderdale, FL 3 bear Emily, want to reach out t ho help you wheneve with your widget for as a thank-you, I'd lii oveWIDGETS. If you incerely, and smith coveWIDGETS. If you incerely, Signed by ACME Widg ohn Smith EO	GET. D, PLANC road 3309 P you per r and wh your per r and wh your per r at offe use this	s code in t	2. 74 74 74 75 74 74 74 75 75 75 75 75 75 75 75 75 75 75 75 75	4	cme Widgets fam nformation sheet Just use the pron row in free shippi	IIV. Our team is here that came packaged no code ng too.		۵ 				
Page 1 of 1 11	I words English (Unit	ed States)	C Accessibili	y: Good to go						L Display Settings	D Focus	₩ [_	-	+ 100%

The Signatures Task Pane

You can view and manage signatures with the Signatures task pane. The easiest way to open this task pane is to click the **View Signatures** command in the Message Bar, which will be displayed whenever requested or valid signatures are detected in a document:

Auto	oSave 💽 Off		~ () =		Signe	d Letter - Saved	to this PC 👻		۶
File	Home	Insert	Draw	Design	Layout	References	Mailings	Review	View
(i) M	ARKED AS FIN	IAL An a	uthor has m	arked this d	ocument as fi	nal to discourage	editing.	Edit Anyway	
(j) s	IGNATURES	This (document c	ontains valio	d signatures.	View Signat	ures		

You can also click **File** → **Info** → **View Signatures**:

	Signed Letter - Saved to this P		John Smit	h 🕕 🙂		\times
©	Info					
	Signed Letter Desktop » Word Files » Sample Files					
▷ Open	🖓 Upload 🖄 Share 🕲 Copy path 🖻 Open file location					
Info	Signed Document	Properties ~				
Save	This document has been signed and marked as final. It should not be edited. If	Size	65.7KB			
Save As	Signatures	Pages Words	1 111			
Print		Total Editing Time Title	2 Minutes None			
Share	Protect Document This document has been marked as final to discourage editing.	Tags Comments	None			
Export	Document ~	Related Dates				

You can also click the signatures icon in the status bar:

Page 1 of 1	126 words	
		This document contains signatures.

With any of these commands, the Signatures task pane will appear on the right-hand side of the Microsoft 365 Word window:

File Home Insert Draw Design Layout References Mailings Review View Developer Help Picture Format	🖻 Share 🛛 🖓 Comments
(i) MARKED AS FINAL An author has marked this document as final to discourage editing. Edit Anyway	×
File Home Insert Draw Design Layout References Mailings Review View Developer Help Picture Format Image: Comparison of the second of th	Signatures Comments Signatures ACME Widgets Inc.Sign 2020-07-06
John Smith, CEO John Smith CEO Signed by: ACME Widgets Inc.Sign	This document is signed. Any edits made to this document will invalidate the digital signatures. Learn more about signatures in Office documents

You can right-click a signature to view its details, open the Signature Setup dialog box, or remove it from the document:

Signatures	- ×
Valid signatures:	
ACME Widgets Inc.Si	gn 2020-07-06
L.	<u>S</u> ign Again 😽
	Signature Details
	Signature Setu <u>p</u>
	Remove Sig <u>n</u> ature

Requested Signatures

When you complete the information in the Signature Setup dialog box, and it is then displayed below the signature line, this is saved as the **requested signature**. It is not considered a valid digital signature.

Valid Signatures

Once the document is digitally signed, a **valid signature** is applied. as previously discussed, its details can be viewed in the Signatures pane.

Activity 4-3: Adding Digital Signatures to a Document

In this activity, you will add a signature line to a document.

1. Open Microsoft 365 Word and open Activity 4-3:



2. Let us add a signature line to the second page. Click to place your cursor after the last sentence on this page:

AutoSave 💽 🗒 🏷 🖑 🗢	Activity 4-3 •	₽ Search		John Smith 📧 — 01 🔅
File Home Insert Draw Design	Layout References Mailings Re	view View Help		🖻 Share 🛛 🖓 Comments
Cipboard Si Cut Cipboard Si Cut Cut Cipboard Si Cut Cipboard Si Cut Cipboard Si Cut Cipboard Si Cut Cut Cut Cut Cut Cut Cut Cut	A^ A^ Aa - A ₂ Ξ - 'Ξ - 'Ξ - ' A A - A - B Ξ Ξ Ξ Ξ Paragrap		bCcD AaBbCcD AaBbCcD AABbCcD AABBC AA Thormal Tho Spac Heading 1 Heading 2 Hea Styles Styles Styles Styles Styles	ABBCC
	at each group of worr somewhat like you, an and not what you think First, select the choice lot like you and write each section. There ar example on the nest p Remember that you an absolute definitions. V Sign your name below	ds. For each group, decide white d learn like you. It's important is people think door you, or m that is most like you and write number 2 an the line, then 2, a ne no ties allowed, so you need agae. The you are finished the quest dylan you are finished the quest before you stort this assessme	h of the four choices is most like you, a lot like you o answer the questions according to whost feels if d y expect. The number 4 on the line. Then select the term that d then 1. You have to use the number 4,3,2,1 in to make a decision on each group. You can see ar not a math exam, so don't get overly tied up in formative, follow the instructions on the scoring shee st.	ou, Ight, an

3. Click Insert → Signature Line:

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File Home	Insert	Draw Design	Layout	References	Mailings	Review	View Help							t	Share	🖓 Comn	nents
Cover Page ~ Blank Page Page Break	Table	Pictures Shapes Icons	3D Models ~	SmartArt Chart	Screenshot	Add from Files *	tet Add-ins ∰ Get Add-ins ∭ Add-ins Wite	W	Online Video	⊗ Link → □ Bookmark E Cross-reference	Comment	Header ~ Footer ~ Page Number ~	A Buick Parts ~ Image: Solution of the solution of	ignature Line ate & Time bject ~	τ ζ	[Equation → }Symbol→	
Pages	Tables		Illustrati	ons		Content	Add-ins		Media	Links	Comments	Header & Footer	Text			Symbols	· .

In the Signature Setup dialog box, enter "Your Name Here" as the suggested signer. Click
 OK:

Signature Setup	?	×							
Suggested <u>s</u> igner (for example, John Doe): Your Name Here									
Suggested signer's <u>t</u> itle (for example, Manager):									
Suggested signer's <u>e</u> -mail address:									
Instructions to the signer:									
Before signing this document, verify that the content you are signing is correct.									
 Allow the signer to add <u>c</u>omments in the Sign dialog ✓ Show sign <u>d</u>ate in signature line 									
OK Cancel									

5. The signature line will be added:

AutoSave 💽 OH	85	v ∪	÷		Activity 4-	3 -		,∕⊃ Search							ر	ohn Smith	JS 🗉	- 0	×
File Home	Insert	Draw	Design	Layout	References	Mailing:	s Review	View Help									년 Sh	are 🛛 🖓 Comm	ents
Cover Page ~ Blank Page Page Break	Table	Pictures :	shapes Icons	3D Models ~	SmartArt Chart	Screenshot	Add from Files ~	Get Add-ins	W Wikipedia	Online Video	B Link - Bookmark C Cross-reference	Comment	Header ~ Footer ~ Page Number ~	Test Bax ~	Quick Parts ~ VordArt ~ A Drop Cap ~	Signatu Date & Object	reLine ~ Time ~	∏ Equation ~ Ω Symbol ~	
Pages	Tables			Illustratio	ins		Content	Add-ins		Media	Links	Comments	Header & Footer		Te	t		Symbols	
						Leader Leader We have one of a conversion of a	Prinke Youre C Prinke Youre C Carve developes th group of we who take you, to vot what you the elect the choice prova and write section. There elect the choice section. There ple on the nex where that you are definitions. roour name below Name Here	HARACTERISTICS AI do consessment the do consessment the your of the people thinks of the or that is most like a which is most like as enabler 3 on the and the sense of the se	so Perferent at can help by, decide + boat you, or can help by, boat you, or can help by boat you, or can help by boat you, or can help by help by boat the source of the	you identify the of the official of the official of the official o	ly what your house to a f four department on the quantition count of the department on the quantition count of the d on the line. The 1. You have to use it is a decision on each of a decision of each of a decision of each of a decision of each of the isotractic	nperament is. like you, a lot diag to what an select the te e numbers 4, group. You ca de overly tide es on the scor	First look May you, look right, each right						
Page 2 of 9 95	54 words	E Engl	ish IUnited Sta	ites) 198	(4 Accessibility	c Investigate									(D'Focus I	10	16	+	100%

6. Save, close, and re-open the document. You should see the **View Signatures** command in the Message Bar. Click it:

AutoSave 💽 Off		?°Ŭ ₹	,	Acti	vity 4-3 - Save	ed to this PC 👻	
File Home	Insert	Draw	Design	Layout	References	s Mailings	Review
Paste Simbard	Painter	Tw Cen MT B I U	(Hei v 18 v ab x ₂ :	∽ A^ A~ x² ▲ ~ .	Aa~ A		
Ciipboard	121		FON		LE I	r T	raragraph
i SIGNATURES	This docu	ument needs	to be signed.	View	Signatures	5	

7. You will see the signature that we just created as a requested signature:

ActoSave 💽 🗒 🖓 - 🖒 = Activity 4-3 - Saved to this PC + 👂 Search	John Smith	8 m - ø ×
File Home insert Draw Design Layout References Mailings Review View Help		e Share Comments
Image: Construction Transmitter A / A / A / A / A / A / A / A / A / A /	Dictate Voice	Sensitivity Sensitivity Sensitivity Editor
L		Signatures * *
Leofedig Assumed		Requested signatures: Your Name Here
WHAT'S YOUR TYPE? HOW ABOUT MINE? ASSESSING YOUR PREFERENCES		
There are namely verys to focuse the personality types of protoch that we work and play with. Whether you one write this list the MMI (lypers, hoge) productions), could net active constraint the Free Colors, the norms of primety, so Crank philosophers, the sides in that there one base temperament that we can include so, and that we prime. The same baselind the side of ansameri relates the Arts in work of Carl Ang. The base substitution of the couple have base to be the set of the violation of Carl Ang. The base substitution through hem of theorem of the couple who have coupleted and violated questionization.		
If you have a new workfired what types of parties – or transportanties – and/or the tast types of facedor, the enseme may support you. To it at measurement the partiest in constrainting and the greatest measure great default failing, for a 1 the ensemble of the partiest constraintion with the partiest measurement of the task of the partiest of the partiest of the partiest of the partiest constraintion of the partiest of the partiest the having on the partiest of the partiest of the partiest of the partiest of the partiest of the partiest of the the having on the partiest of the parti		
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The is an afficial assessment developed by Task Fast Training, Inc.		This document is not signed. Signatures are used to protect the authenticity and integrity of a document.
ni in territori i Silante III tenin Itala State III de Leveninite tentinte Viceo	84 88	Learn more about signatures in Office documents

8. Close Microsoft 365 Word to complete this activity.

TOPIC D: Restrict Document Access

In this topic, we will explore another tool that you can use to secure your documents: applying a password. We will cover how to apply a document password, change an existing password, and remove a password from a document entirely.

Topic Objectives

In this session, you will learn:

- How to apply a password to a document
- How to change or remove a document password

Applying a Document Password

For additional security, you can add passwords to your documents. To start, open the document and click File \rightarrow Info \rightarrow Protect Document \rightarrow Encrypt with Password:



Now, enter the password in the provided text field and click **OK**:

Encrypt Document		?	×					
Encrypt the contents of Passwo <u>r</u> d:	of this file							
Caution: If you lose or forget the password, it cannot be recovered. It is advisable to keep a list of passwords and their corresponding document names in a safe place. (Remember that passwords are case-sensitive.)								
	ОК	Ca	ncel					

Then, retype the password to confirm it and click **OK**:

Confirm Password		?	\times
Encrypt the content <u>R</u> eenter password:	s of this file		
•••••			
Caution: If you lose cannot be recovere passwords and the names in a safe pla (Remember that pa	e or forget the pa d. It is advisable t ir corresponding ce. sswords are case	ssword, it to keep a li document -sensitive.)	ist of
	ОК	Ca	ncel

The Info category of Backstage view will now indicate that the file has a password applied to it:



Changing the Document Password

	To change the password,	click File → Info → Protect Document ·	→	Encry	pt with	Password:
--	-------------------------	--	---	-------	---------	-----------



In the Encrypt Document dialog box, enter the new password and click **OK**:



Re-enter the new password to confirm it and click **OK**:

Confirm Password		?	×				
Encrypt the contents or <u>R</u> eenter password:	f this file						
Caution: If you lose or forget the password, it cannot be recovered. It is advisable to keep a list of passwords and their corresponding document names in a safe place. (Remember that passwords are case-sensitive.)							
	ок	Ca	ncel				

The document password will now be changed.

Removing the Document Password

To remove the password, click File \rightarrow Info \rightarrow Protect Document \rightarrow Encrypt with Password:



In the Encrypt Document dialog box, remove the password from the text field and click **OK**:

Encrypt Document		?	×					
Encrypt the contents o Passwo <u>r</u> d:	f this file							
Caution: If you lose or forget the password, it cannot be recovered. It is advisable to keep a list of passwords and their corresponding document names in a safe place. (Remember that passwords are case-sensitive.)								
	ок	Ca	ncel					

Now, the document will no longer be password protected.

Activity 4-4: Restricting Document Access

In this activity, you will apply a password to a document.

1. Open Microsoft 365 Word and open Activity 4-4:



 Let us add a password to this document. Click File → Info → Protect Document → Encrypt with Password:



3. The Encrypt Document dialog box will open. Type the word "**password**" in the text field and click **OK**:

Encrypt Document		?	×
Encrypt the content	s of this file		
Passwo <u>r</u> d:			
Caution: If you lose cannot be recovere passwords and the names in a safe pla (Remember that pa	e or forget the pa d. It is advisable ir corresponding ice. sswords are case	assword, it to keep a li g document e-sensitive.)	st of

In a real-world scenario, you would choose a strong password that is a mix of uppercase and lowercase letters, numbers, and special characters. **4.** The Confirm Password dialog box will open. Type the word "**password**" again to confirm it and click **OK**:



5. Back in the Info category of Backstage view, you can see that the password has been applied:



6. On second thought, we do not really need a password for this document. In the Info category of Backstage view, click **Protect Document** → **Encrypt with Password**:



 In the Encrypt Document dialog box, remove the password from the text field and click OK:

Encrypt Document	?	×						
Encrypt the contents of this file								
Caution: If you lose or forget the password, it cannot be recovered. It is advisable to keep a list of passwords and their corresponding document names in a safe place. (Remember that passwords are case-sensitive.)								
ОК	Ca	ncel						

8. Back in the Info category of Backstage view, you can see that there is no longer a password applied to this document:



9. Save your document as Activity 4-4 Complete. Close Microsoft 365 Word to complete this activity.

Summary

In this lesson, you learned about different ways to secure important documents. You should now feel ready to assess each document's requirements and apply the necessary security measures, such as digital signatures, document passwords, and/or editing restrictions.

LESSON 5: FORMS

Lesson Objectives

In this lesson you will learn how to:

- Create forms
- Manipulate forms
- Convert form data

TOPIC A: Create Forms

Microsoft Office Word 365 can assist with data automation by providing the ability to create and customize interactive forms. In this topic, we will learn how to create a form for data entry and add controls to it.

Topic Objectives

In this session, you will learn:

- What a form is
- How to plan a form
- How to add controls to a form
- How to enter Design mode
- How to use legacy tools
- How to set form field options
- How to toggle form field shading
- How to protect and reset a form

Forms

In this context, the term "form" refers to an electronic or paper document used to gather information. When dealing with electronic files, data protocols such as XML can be used to store and manage data.

Many of the commands to work with forms are located on the Developer tab, which is not enabled by default.

To enable this tab, click **File** \rightarrow **Options**:

Now, choose the Customize Ribbon category from the left-hand side of the Word Options dialog box. Then, in the list on the right-hand side, check **Developer**. Click **OK** to apply the change:

Word Options					?	\times
General	Customize the Ribbon and ke	yboard s	shortcuts.			
Display	Channe ann an ta fan mu O	-		Customics the Ditchers		
Proofing	Choose commands from: ()			Main Tabr		
Save	Popular Commanus			Wall Tabs		
Language	Accept Revision	•		⊞ ☑ Insert (Blog Post)		
Ease of Access	Bullets			Background Removal		
Advanced	Center	·		E 🗹 Home		
Customize Ribbon	← Change List Level			Clipboard		
Quick Access Toolbar	X Cut			Font Paragraph		
A 11 2	Define New Number Format					
Add-Ins	Graw Table			Editing		
Trust Center	Draw Vertical Text Box			E Editor		
	Par Email			⊞ 🗹 Insert		
	Find			🗄 🗹 Draw		^
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	re Link	-		Customizations: Reset -		
	Keyboard shortcuts: Cus <u>tomize</u>			Import/Export 🔻 🛈		
L				OK	Ca	incel
					3	

The Developer tab will now be accessible:



Plan a Form

Let us start by creating a basic form. We highly recommend that you create a table and lay out the basics of your form, just as if you were creating a form that would be filled in by hand. (Remember that table commands can be found on the Insert tab.)

For example, here is a basic customer satisfaction form that was created using a table and related features:

Date of Purchase:	Product(s) Purchased					
Store Location:						
Was this your first time shopping with us?						
How would you rate your shopping experience with us?						
Would you shop with us again?						
Home Phone Number:	Email Address:					

Various cells were merged or split in order to create the desired layout. A style was then applied and modified.

The form should then be saved as a template. Remember, you can do this using the Save As dialog box:



You are now ready to move to the next step: adding controls and fields.

The Controls Group

Once you have created the structure of your form, it is time to add some form fields and controls. These elements will allow users to interact with forms in an electronic format. In order to add controls, you must first enable the Developer tab. (See the beginning of this topic for more information.) Basic form controls can be found in the **Controls** group of the **Developer** tab:

Auto	Save 💽 Off	89	<u>ں</u> ۔	~	Surve	y - Saved	to this PC 🝷	, D Sea	rch				
File	Home	Insert	Draw	Desi	ign	Layout	References	Mailings	Revie	ew View	Developer	Help	
Visual Basic	Macros	ecord Mac ause Recor lacro Secu	ro ding rity	Add- ins A	کی Word Add-ins	COM Add-ins	Aa Aa 🔛 📮 ☑ 🗊 🗊 📰	Design N Propertie	/lode es	XML Mapping Pane	Block Authors ~	Restrict Editing	Document Template
	Code			1	Add-ins		Coi	ntrols		Mapping	Prote	ct	Templates

Let us take a quick look at each command:

lcon	Description
Aa	Inserts a rich text box control.
Aa	Inserts a plain text box control.
~	Inserts a picture control.
Ţ.	Inserts a Building Block control.
	Inserts a checkbox, where users can specify one or more conditions.
	Inserts a combo box, where users can pick from multiple items.
	Inserts a drop-down list, where users can pick from a drop- down menu.
	Inserts a date picker, where users can pick a date from a calendar.
	Inserts a repeating section control, which can contain multiple controls that can be inserted over and over again.
E ~	This menu contains form controls offered in previous versions of Word and ActiveX controls, referred to as legacy tools .

Content Controls

Some of the more advanced controls available in Microsoft 365 Word are called **content controls**. These allow users to interact with document properties or objects (such as date pickers) to make form entry easier and less prone to error.

Form Controls

To insert a control, first place your cursor where you want the control to appear. Then, click the desired icon in the Controls group of the Developer tab. For example, here we are about to insert the date picker into the Date cell in the table:

AutoSave 💽 🗄 りゃ ひ 🗢	Survey 🗸	♀ Search	
File Home Insert Draw De	esign Layout References	Mailings Review View	Developer Help Table Design Layou
Visual Macros Basic Code	Word COM Aa Aa Image: Com Add-ins Aa Aa Add-ins Image: Com	Design Mode Properties Group ~ Mapping Mapping	g Block Restrict Authors ~ Editing Protect Template
	Da	te Picker Content Control	
	Ins	ert a date content control.	
	Date of Purchase	Store Sur	Vey
	Store Location:		
	Was this your first time s	shopping with us?	
	How would you rate you	r shopping experience with us?	
	Would you shop with us	again?	
	Home Phone Number:	Email	I Address:

Once the command is executed, the control appears in the form and is ready to be used:

Store Survey									
÷								_	
	Date of Purchas	lick o	r tap	to e	ente	rac	late	· N	Product(s) Purchased
Ī	Store Location:	\triangleleft		Jun	e, 20	20		No.	
- t	Was this your first	Su	Мо	Tu	We	Th	Fr	Sa	
		31	1	2	3	4	5	6	
		14	15	16	17	18	19	20	
		21	22	23	24	25	26	27	
Ī		28	29	30	1	2	3	4	
ľ	How would you rat		6	I	° oday	9	10		th us?
Would you shop with us again?									
	Home Phone Number: Email Address:								

To remove a control, select it with your cursor and press the Delete key on your keyboard.

Design Mode

To edit the properties of some controls, you will need to enter Design Mode. To do this, click **Developer** \rightarrow **Design Mode**:

AutoSave 💽 🖪 🍤 🏹	≂ Surve	y -	,∕⊃ Search			
File Home Insert Dra	w Design Layout	References	Mailings Revi	iew View	Developer Help	
Visual Macros Basic	Add- Word COM ins Add-ins Add-ins	Aa Aa 🟊 📮 ☑ 🗊 🗄 🗰	Design Mode Properties	XML Mapping Pane	Block Authors ~ Editing	Document Template
Code	Add-ins	Co	ntrols	Mapping	Protect	Templates

When you are finished, click **Developer** \rightarrow **Design Mode** again to return to editing mode.

Legacy Tools

Legacy controls, which are compatible with Word 2003 and earlier, can be found by clicking **Developer** \rightarrow Legacy Tools:



Let us take a look at the six legacy controls:

lcon	Description
ab	Inserts text field.
\searrow	Inserts a checkbox.
• • • •	Inserts a list box.
Ħ	Inserts a frame.
a	Shades form fields.
\$	Reset form fields to empty; useful when testing.

Like other controls, simply click to place your cursor in the form and then from the drop-down menu click the control that you would like to insert:

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File Home Insert Draw De	esign Layout References	Mailings Review View	w Developer Help Table Design	Layout
Wisual Macros Basic Basic Basic Add-ins Code Code Code Code	↓ ↓ </td <td>Properties Properties Group ~ Mappin Mappin</td> <td>ping Block Restrict Authors ~ Editing Protect Template</td> <td></td>	Properties Properties Group ~ Mappin Mappin	ping Block Restrict Authors ~ Editing Protect Template	
		準然ぐ k Box Form Field 回信意 目前 Store Su	ırvey	
	Date of Purchase: Click o	r tap to enter a date. Pro	oduct(s) Purchased	
	Store Location:			
	Was this your first time s Yes No	shopping with us?		
	How would you rate you	r shopping experience with u	IS?	
	Would you shop with us	again?		
	Home Phone Number:	En	nail Address:	

Form Field Options

In the case of certain controls, the control is ready to use as it is. But if you insert a customizable item such as a drop-down list or a combo box, you need to tell Word what sort of content it will contain. To do this, first insert the control you want to use. Then, click the control to select it and click **Developer** \rightarrow **Properties**. For example, here we have inserted a drop-down list and we are about to modify its properties:

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File Home Insert Draw	Design Layout	References Mailings	Review View	Developer Help	Table Design	Layout
Visual Macros Basic Macro Security	Add- Word COM Add-ins Add-ins	Aa Aa 🖾 🗐 🕅 Design I	Aode	Block Restrict Authors ~ Editing	Document Template	
Code	Add-Ins	Control P	mapping	Protect	Templates	
		View or m selected c	odify properties for the ontrol.			
		:	Store Sur	vey		
	Date of	Purchase: Click or tap to ent	er a date. Produ	ct(s) Purchased		
	Store Lo	cation:				
	Was this	s your first time shopping wi	th us?			
	Yes					
	No					
						_
	How wo	uld you rate your shopping	experience with us?			
	Choose	an item. 🔻				
	Would y	rou shop with us again?				
	Home P	hone Number:	Email	Address:		

The appropriate Properties dialog box will open. Here, you can modify various aspects of the control:

Content Control Properties	?	×					
General							
<u>T</u> itle:							
Tag:							
Show as: Bounding Box 🗸							
<u>C</u> olor: 💁 👻							
Use a style to format text typed into t	he empty	control					
Style: Default Paragraph Font 🗸							
A ₊ <u>N</u> ew Style	A ₊ <u>N</u> ew Style						
Remove content control when conter	nts are eo	lited					
Locking							
Content control cannot be <u>d</u> eleted							
Contents cannot be <u>e</u> dited							
Drop-Down List Properties							
Display Name Value	<u>A</u> d	ld					
Choose an item.	Mod	dify					
Rem <u>o</u> ve Move U <u>p</u>							
ОК	Ca	incel					

(Note that this dialog box may look different, depending on what type of control you have selected.)

For this example, we can add the desired values for the drop-down menu by clicking the **Add** button:

Content Co	ntrol Prop	erties		?	×			
General								
<u>T</u> itle:								
T <u>ag</u> :								
<u>S</u> how as:	Bounding	g Box 🗸]					
Color:	<u>C</u> olor: 🖉 👻							
Use a s	tyle to for	mat text i	typed into t	he emp	oty control			
<u>S</u> tyle:	Default P	aragraph 	Font 🧹					
A ₊ <u>N</u>	ew Style							
<u>R</u> emov	e content	control v	hen conter	nts are	edited			
Locking								
Conter	nt control (annot b	e <u>d</u> eleted					
Conter	nts cannot	be <u>e</u> dite	d					
Drop-Down	List Prope	rties						
Display N	ame	Value			Add			
Choose ai	n item.			M	odify			
	Rem <u>o</u> ve							
				M	love U <u>p</u>			
				Mo	ve Do <u>w</u> n			
			OK		Cancel			

Now, we can type the name of the drop-down entry. (The Value field will automatically be populated as you do this.) Click **OK**:

Add Choice		?	×
Display <u>N</u> ame:	Excellent		
<u>V</u> alue:	Excellent		
	ОК	2	Cancel

The entry	unill nour or	noor in tha	Contont Cor	atral Dranart	iac dialag have
The entry	/ WIII HOW al	ibear in the '	соптент сог	ILLOI PLODELL	ies ulaiog dox.

Content Co	ntrol Prop	erties		?	×			
General								
<u>T</u> itle:								
T <u>ag</u> :								
<u>S</u> how as:	Boundin	g Box	\sim					
<u>C</u> olor:	<u>></u> -							
Use a s	tyle to for	mat te	t typed into f	the en	pty control			
<u>S</u> tyle:	Default P	aragra	ph Font 🧹					
A ₊ <u>N</u> ew Style								
Remov	e content	contro	l when conte	nts ar	e edited			
Locking								
Conter	nt control	cannot	be <u>d</u> eleted					
Conter	nts cannot	be <u>e</u> di	ted					
Drop-Down	List Prope	rties						
Display N	ame	Value			<u>A</u> dd			
Choose an Excellent	n item.	Excell	ent	1	<u>N</u> odify			
					Rem <u>o</u> ve			
				1	Nove U <u>p</u>			
				M	ove Do <u>w</u> n			
			OK		Cancel			

Repeat the above process to continue adding more entries. Click **OK** to save your changes when you are finished.

Toggling Form Field Shading

The **Legacy Forms** menu also contains a command to toggle shading on or off for all the fields in a particular form:

AutoSave 💽 🖪 🖓 💍	≂ Surve	y -	✓ Search				
File Home Insert Dra	w Design Layout	References	Mailings Revi	iew View	Developer Help		
Visual Macros Basic	Add- Word COM ins Add-ins Add-ins	Aa Aa 🔜 🗊 🗹 🗊 🗊 🗰	Design Mode Design Mode Group ~	XML Mapping Pane	Block Restrict Authors ~ Editing	Document Template	
Code	Add-ins	Legacy Fo	rms	Mapping	Protect	Templates	
ActiveX Contre							
			● C] \$ 3 = 14				

Clearing Entered Data from Form Fields

You can also use the Legacy Forms menu to reset all fields in a form to their default information:



Protecting a Form

If you have completed your form, we recommend that you protect it so it cannot be edited by users (except, of course, for the portions that need to be filled in). To protect the form, click **Developer** → **Restrict Editing**:

Autos	Save 💽 Off	89	U ~	~		Survey	/ -	⊖ Sear	ch				
File	Home	Insert	Draw	De	sign	Layout	References	Mailings	Revi	ew View	Developer	Help	
P		ecord Macr	ro ding	6	~Č}		Aa Aa 🔜 🗊	Design M	lode s		8		
Visual Basic	Macros 🛕 N	lacro Secur	ity	Add- ins	Word Add-ins	COM Add-ins	Ē Ē∳ ~	Group ~		XML Mapping Pane	Block Authors ~	Restrict Editing	Document Template
	Code				Add-ins		Cor	ntrols		Mapping	Prote	ect 🖓	Templates

You will then see the Restrict Editing task pane. Check the second box and choose "Filling in forms" from the drop-down menu:

AutoSave 💽 🗄 🦃 🦉 👻	Survey + 🔎 S	Search	John Smith	× 🗆 – 🖬 🔊
File Home Insert Draw Design Image: Second Macros Image: Second Macros	Layout References Mailings Review Aa Aa Sa Sh Design Mode COM Add-ins Sign System Communications	w View Developer Help Table Design XML Mapping Protect Kathon Protect Template	Layout	යි Share Comments
	Stores	Survey		Restrict Editi * × 1. formatting restrictions Chimt formatting to a selection of styles Settings 2. Editing restrictions Children restrictions
Date Store Was	: of Purchase: e Location: this your first time shopping with us?	Product(s) Purchased		If the document: Filling in forms Tracked changes Comments Senting in forms Very changes (read only) Ne changes (read on
How	would you rate your shopping experience wi	th us?		
Hom	e Phone Number:	Email Address:		See also
Page 1 of 1 37 words 00 English (United States	s) 🖂 (4. Arcessibility Investigate		D'Engur DB	R - + 100%

Then click Yes, Start Enforcing Protection. You will see this dialog box appear:

Start Enforcing Protection	?	×						
Protection method								
Password								
(The document is not encrypted. Malicious users can edit the file and remove the password.)								
Enter new password (optional):								
Reenter <u>p</u> assword to confirm:								
 User authentication 								
(Authenticated owners can remove docum The document is encrypted and Restricted enabled.)	ient pro I Access	tection. is						
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Here, you can choose to protect the form using a password or user authentication. We recommend that you always enter a password; otherwise users can easily unprotect the form. However, passwords are not required: simply leave the password fields blank if this is what you wish to do.

Once you click **OK** in this dialog box, the Restrict Editing task pane will change to let you know you can only fill in the form:

AutoSave		> े -	Survey 🕶	🔎 Search				John Smith	IS E	- 0	×
File Ho	lome Insert	Draw Design	Layout Refere	nces Mailings F	teview View	Developer Help)		🖻 Shar	e 🖓 Com	ments
Visual Macro Basic	 Record Ma I Pause Record Macro Sec Code 	cro ording urity Add- Add- Add-ins Add-ins	COM Aa Aa	Controls	XML Mapping Pane Mapping	Block Authors ~ Editing	Document Template Templates				~
									Postrict	Editi 🔻	×
			St	ore Surve	y				Your permis This docum unintention You may on region.	sions ent is protected hal editing. ly fill in forms in	l from n this
		Date of Purchase:		Product(s)	Purchased		1				
		Store Location:									
		Was this your first tin	ne shopping with u	s?			-				
		How would you rate y	your shopping expe	erience with us?							
	Would you shop with us again?										
		Home Phone Number	:	Email Addre	255:		1				
Page 1 of 1	37 words 171	English (Canada) 🐻	(4. Accessibility: Inve	stigate			η, Έργικ		Stop Prot	ection	100%

To stop protecting the form, click **Stop Protection**. If a password has been used to protect the form, you will be prompted to enter it. (Without the password, the document cannot be unprotected.) If a password has not been used, the document will simply be unprotected and available for editing.

Activity 5-1: Creating a Form

In this activity, you will create and test a simple form.

- **1.** To begin, open Microsoft 365 Word. Create a blank document.
- If you already have the Developer tab enabled, skip to Step 4. Otherwise, click File →
 Options:

4.

3. The Word Options dialog box will appear. Click the **Customize Ribbon** category on the left-hand side. Check the **Developer checkbox** and click **OK**:

Word Options					?	\times
General	Customize the Ribbon and k	evboard	shortcuts.			
Display		·				
Proofing	Choose commands from: 1		1	Customize the Ri <u>b</u> bon: ①		
	Popular Commands	Ψ		Main Tabs	*	
Save			1	- <u> </u>		
Language	Accept Revision	i =		🗉 🗹 Insert (Blog Post)		
Ease of Access	Align Left			🗉 🗹 Outlining		
Advanced	Bullets	+ -		Background Removal		
	← Change List Level	•		Home		
Customize Ribbon	Сору			E Clipboard		
Quick Access Toolbar	X Cut					
Add-ins	Delete			Styles		
Truck Control	Draw Table			E Voice		
Trust Center	Draw Vertical Text Box			Editor		
	P Find		<u>A</u> dd >>			
	Fit to Window Width	_	< < Remove			•
	Font A Fort Color	I-		E V Lavout		
	A Font Color	15		E References		
	Font Size	I				
	ab Footnote			🕀 🗹 Review		
	A Grow Font			🗄 🗹 View		
	- Insert Comment		\rightarrow	Developer		
	Insert Page Section Breaks	•		Add-ins		
	A Insert Text Box			⊞ 🗹 Help	-	
	🗒 Line and Paragraph Spacing	• • _		Ne <u>w</u> Tab <u>N</u> ew Group Ren	a <u>m</u> e	
	ප Link	Ŧ		Customizations: R <u>e</u> set v (i)		
	Keyboard shortcuts: Customize			Import/Export 🔻 🤅	D	
				ОК	Ca	ancel

With the Developer tab	Store Survey	
now displayed, create a table that looks like the following. Use the	Date of Purchase: Store Location: Was this your first time shopping with us?	Product(s) Purchased
Insert tab to		L
create the table and the	How would you rate your shopping experience w	/ith us?
contextual tabs to design it. (You can start by creating a	Would you shop with us again?	
2x7 table and	Home Phone Number:	Email Address:
then		

merging/splitting cells as necessary.) Do not forget the "Store Survey" title!

5. Click File → Save As → Browse:



6. When the Save As dialog box appears, select Word Template from the "Save as type" drop-down menu. Name the document Activity 5-1 and save it to your desktop. Click Save:

🔟 Save As							×
← → ~ ↑ 🗖	▹ This PC	> Desktop >		√ Č	Search Desktop		P
Organize 👻 Ne	w folder						?
 ✓ Quick access ✓ Desktop ✓ Documents ✓ Downloads ジ Dropbox ✓ Creative Clou ✓ Pictures ✓ This PC 	# # # d Files # #	Name	^	Date modified 2020-06-10 10:10	Type . File folder	Size	
Microsoft Word	н	< <					>
File name:	Activity 5-1	1					\sim
Save as type:	Word Temp	plate					\sim
Authors:	John Smith	h	Tags: Add a tag		Title: Add a title		
	🗸 Save Thu	ımbnail					
∧ Hide Folders				Tools 🔻	Save	Cancel	

7. Returning to the document, click inside the Date of Purchase cell to place the cursor there. Add a space after the colon if necessary:

Date of Purchase:

8. Click Developer → Date Picker:

AutoSave 💽 🗄 りゃ ひ	⇒ Activit	y 5-1 👻	♀ Search			
File Home Insert Dra	w Design Layout	References	Mailings Rev	view View	Developer Help	Table Design
Visual Macros Basic	Add- Word COM ins Add-ins Add-ins	Aa Aa 🔛 🖣 🗹 🗊 💷 📰	Design Mode	XML Mapping Pane	Block Authors ~ Editing	Document Template
Code	Add-ins	Cor	ntrols	Mapping	Protect	Templates

9. The control will be added. Click to place your cursor beside the words "Product(s) Purchased." Press Enter twice. Click the Rich Text control on the Developer tab:

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File Home Insert D	raw Design Layout	References Mailing	s Review View	Developer Help	Table Design	Layout					
Visual Macros Basic	Add- Word COM ins Add-ins Add-ins	Aa Aa S Desig	n Mode	Block Restrict Authors ~ Editing	Document Template						
L	1 · · · I · · · # · · · I	Rich Text Content Controls	ol 3 # · · ·	· · 4 · · · 1 · · · 5		· _ # 1 · · · 7 .					
-		Insert a rich text content	:ontrol.								
-											
1											
	Store	e Survey									
	+ <u>+</u> +										
-	Date of P	urchase: Click or tap to en	er a date. Product	t(s) Purchased							
÷	Was this	auon: your first time shopping v	/ith us?	-							
1											
~						_					
	How wou	ld you rate your shopping	experience with us?			-					
-											
1	Would yo	u shop with us again?									
	Home Pho	one Number:	Email A	ddress:		_					
1											
								•	-		~
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Autosave	Activity 5-1 +) Search					John Smith		4	- u	^
File Home Insert Draw Design	Layout References	Mailings Review	v View	Developer	Help	Table Design	Layout		🖻 Share	Com	ments
Record Macro	👌 🔜 🗛 🗛 🙀	Design Mode	8	8	Pa	<u>w</u> -					
Visual Macros Macros Add- Wor		Properties	XML Mapping	Block R	estrict	Document					
Code Add-	ins Add-Ins Eg Cy *	ntrois	Mapping	Authors * E	aiting	Templates					~
L 1		2	3	. 4	5		# 1 · · · 7 ·				
-											
-											
	Store Surve	V									
-		,			Cali	hri (Ro 11 Δ*	A* 1= 1=				
	Date of Purchase: Click or	tap to enter a date.	Product(s) Purchased	B				ert Delete		
	Store Location:	·			U		<u>∞ · m · ·</u>	V	en benere		
-	Was this your first time sh	opping with us?	Click or t	ap here to en	ter	Cu <u>t</u>					
					(p	Сору р					
~					Ê	Paste Options:					
-	Here would you rate your	shonning owneriones	Con debu		_						
-	How would you rate your	snopping experience	with us:		0	Smart Lookup					
- -						Superview	,				
-	Would you shop with us a	igain?				Translate					
-					4	Barran Castant C	and and				
						Kemove Content Co	ontroi				
	Home Phone Number:		Email Ad	dress:	_	Insert	>				
-						Delete Cells					
						Sglit Cells					
						Border Styles	>				
					ļ ļî	Text Direction					
-					ΞÈ	Table Properties					
					Q	Link	>				
u	RR /4+ Accessibility Investig	ate			¢7	New Comment	a	53			100%

10. This will insert the control. Next, **select it** and **copy it**:

11. Right-click inside the "E-mail address" field and click Paste → Keep Source Formatting from the context menu:

AutoSave 💽 🗄 🏷 🤆	≂ Activity 5-1 -	♀ Search				John Smith	JS	⊞ -	- 0	×
File Home Insert Draw	v Design Layout Referenc	es Mailings Revie	w View D	eveloper Help	Table Design	Layout	ß	Share	Comm	nents
Visual Macros Basic	Add- Word COM	Design Mode	XML Mapping Pane	Block Restrict Authors ~ Editing	Document Template					
L 1	Add-Ins :	Controls	3 mapping 1	4 · · · · · · · 5	iemplates :	(単1・・・7・				^
	Store Sur Date of Purchase: Cli Store Location: Was this your first ti How would you rate	VEY :k or tap to enter a date. ne shopping with us? your shopping experience	Product(s) Click or tap e with us?	Paste Purchased here to enter text.	Options:					
· · · · · · · · · · · · · · · · · · ·	Would you shop with	us again?								
	Home Dhone Numbe		Emoil Addr	ore: Click or tap he	ro to optor tout	_				
Page 1 of 1 S1 words ITL English	(Canada) 🖾 (La Accessibility)	nuestinate	Email Addr	ess. click of tap he	D'Equis					100%

Note that the rest of the right-click menu fades away when you point to Keep Source Formatting. The control will be pasted once you click the command.

12. Click **Developer** → **Restrict Editing**:

AutoSave 💽 🗍 🏳 🗸 🖓	⇒ Activ	ity 5-1 👻	🔎 Search			
File Home Insert Dra	w Design Layou	t References	Mailings Rev	view View	Developer Help	Table Design
Visual Macros Basic	Add- Word COM ins Add-ins Add-in	Aa Aa 🔜 🗐 ✓ 🗊 🗊 📰 Is	Design Mode Properties Group ~	XML Mapping Pane	Block Authors - Editing	Document Template
Code	Add-ins	Co	ntrols	Mapping	Protect 4	Templates

13. The Restrict Editing task pane should now be displayed. Check the checkbox under "2.Editing restrictions" and then select "Filling in forms" from the drop-down menu:

Restrict 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) and choose users who are allowed to 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

14. Now click "**Yes, Start Enforcing Protection**" at the bottom of the pane:

Restrict Editi 👻 🗙											
1. Formatting restrictions											
Limit formatting to a selection of styles											
Settings											
2. Editing restrictions											
Allow only this type of editing in the document:											
Filling in forms 💌											
3. Start enforcement											
Are you ready to apply these settings? (You can turn them off later)											
Yes, Start Enforcing Protection											
3											

(If this command is not available, click Developer \rightarrow Design Mode.)

15. The Start Enforcing Protection dialog box will open. Click **OK** to protect the form without a password:

Start Enforcing Protection	?	×									
Protection method											
Password											
(The document is not encrypted. Malici the file and remove the password.)	ous users ca	an edit									
Enter new password (optional):											
Reenter <u>p</u> assword to confirm:											
 User authentication 											
(Authenticated owners can remove document protection. The document is encrypted and Restricted Access is enabled.)											
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In a real-world scenario, you would choose a strong password that is a mix of uppercase and lowercase letters, numbers, and special characters.

16. Save your document as Activity 5-1 Complete. Close Microsoft 365 Word to complete this activity.

Microsoft 365 Word: Part 3

TOPIC B: Manipulate Forms

So far in this lesson, we have created a basic form. It is now time to learn about manipulating the controls in a form. You will learn how to modify the title of a control, change its properties, and assign help to a form field.

Topic Objectives

In this session, you will learn:

- How to modify the title tab for a control
- How to add help to a form field

Modifying a Control's Title Tab

Many controls are identified by a title that appears at the top of its bounding box:



To modify a title (or to add one if none is present), select the control and click **Developer** \rightarrow **Properties**:

AutoSave 💽 🖪 🍤 🤍 🔻	Surv	vey 🕶	♀ Searce	:h			
File Home Insert Draw D	esign Layout	References	Mailings Revie	w View	Developer Help	Table Design	Layout
Visual Macros Basic	Word COM Add-ins Add-ins	Aa Aa 🖾 🛱 📔	Design Mode Properties	XML Mapping Pane	Block Restrict Authors ~ Editing	Document Template	
Code	Add-ins	Contr	rols	Mapping	Protect	Templates	
			Control Properties View or modify pro selected control.	5 operties for the			
	4			Store S	Survey		
		Date of Purchase:	Click or tap to ent	ter a date.	Product(s) Purchase	d	
	S	Store Location:					
	١	Was this your first	t time shopping w	ith us?			
		∕es 🗆					
	r	Noロ					
	-						
	F	How would you ra	ate your shopping	experience wi	th us?		
	Ec	Choose an item.	¥				
	Ň	Would you shop v	with us again?				
	ŀ	Home Phone Num	nber:		Email Address:		

The Properties dialog box for that control will open. Enter the desired title in the appropriate field and click **OK**:

Content Control Prop	erties		?	×								
General												
<u>T</u> itle: Experien	ce Rating											
T <u>ag</u> :												
<u>S</u> how as: Boundin	Show as: Bounding Box 🗸											
<u>C</u> olor: 🖉 🔻												
Use a style to for	mat text typ	ed into tł	ne empty	control								
<u>S</u> tyle: Default P	aragraph Fo	ont 🧹										
A ₊ <u>N</u> ew Style												
Remove content	control whe	n conten	ts are ed	ited								
Locking												
Content control	cannot be <u>d</u>	eleted										
Contents cannot	be <u>e</u> dited											
Drop-Down List Prope	rties											
Display Name	Value		<u>A</u> d	d								
Excellent	Excellent		Mod	lify								
			Rem	1 <u>o</u> ve								
			Mov	e U <u>p</u>								
			Move	Do <u>w</u> n								
		ок 🔓	Ca	ncel								

The title will now be applied:



Adding Help Contents to Form Fields

Sometimes it may not be obvious what a particular form control is used for or what sort of information the user is supposed to enter. Word allows you to add help information to some form fields to better describe the type or format of information that is required for a particular field.

To start, open the control's property dialog box by clicking **Developer** \rightarrow **Properties**. Then, click the **Add Help Text** button:

Drop-Down Form Field	d Options	?	×
Drop-down item: Add >> Remove	Items in drop-down list	: ^ ~	Move
Run macro on			
Entr <u>y</u> : Field settings	E <u>x</u> it:		~
Bookmark: Dropdov	vn1		
Drop-down e <u>n</u> able	ed		
Add Help <u>T</u> ext	ОК	Car	ncel

Upon completing this action, you will see the Form Field Help Text dialog box. You have the option to display help in the status bar or in a pop-up box when the F1 key is pressed on the keyboard. Set your options in the desired tab(s) and click **OK**:

Form Field He	lp Text		?	×
<u>S</u> tatus Bar	Help <u>K</u> ey (F1)			
○ <u>N</u> one				
O AutoText e	entry:			\sim
Type your	own:			
Please choos	e one.			
		ок	Car	ncel

Once you click **OK**, the help information will be applied to the selected control.

Activity 5-2: Manipulating Forms

In this activity, you will modify control properties in a variety of ways, including adding help text. Ensure that the Developer tab is enabled before beginning this activity.

Open Microsoft 365 Word. At the Start screen, click Open → Browse:



3. Browse to the Lesson 5 folder of your Exercise Files. Click to select Activity 5-2 and click **Open**:



4. The template will open for editing. Click to place your cursor at the end of the line "How would you rate your shopping experience with us?" text. Press ENTER twice. Click Developer → Legacy Tools → Drop-Down Form Field:

Auto	oSave 💽 Off	1日 9	~ U	÷		Activity	5-2 🕶	,∕⊃ Searc	h							John Smith	JS
File	Home	Insert	Draw	De	sign	Layout	References	Mailings	Review	View	Developer	Help	Table De	sign	Layout		
Visual Basic	Macros	Record Macr Pause Recorr Macro Secur	ro ding ity	Add- ins	Word Add-ins	COM Add-ins	Aa Aa 🔜 📮	Design Mo	de XM	L Mapping Pane	Block Authors ~	Restrict Editing	Document Template				
	Cod	e		1 · ·	Add-ins	≝∑ • •	Legacy Fo			Mapping · 3 · · · ı	Prote	ct l	Templates	6		7	
						Н		<u>-1</u> ≣ (d) ♦∕									
							Active)	rop-Down Form	Field								
							⊻⊎A	◎ 남글 \$ 몸 몸 114									
						Store Survey											
						Store Survey											
					[÷											
						Date	of Purchase: Clic	k or tap to en	ter a date	. Proc	duct(s) Purch	nased					
						Store	Location:		Click or tap here to				e to enter text.				
						Wast	his your first tin	ne shopping w	ith us?								
						How	would vou rate v	our shopping	experien	ce with us?	?						
									•								
						→											
						Woul	d you shop with	us again?									

5. The field will be inserted. Now we should add entries to it. With the field still selected, click Developer → Properties:

AutoSave 💽 🗄 🏷 💍				≂ Activity 5-2 -				♀ Search						
File	Home	Insert	Draw	De	esign	Layout	References	Mailings	Revie	ew View	Developer	Help	Table Desig	yn
Visual Basic	Macros	ecord Macr ause Record Macro Secur	o ding ity	Add- ins	کی Word Add-ins	COM Add-ins	Aa Aa 🔛 📮	Design M Propertie	s G	XML Mapping Pane	Block Authors ~	Restrict Editing	Document Template	
	Code				Add-ins		Cor	ntrols		Mapping	Prote	ect	Templates	

6. The Drop-Down Form Field Options dialog box will open. In the "Drop-down item" field, type "Excellent." Click Add >>:

Drop-Down Form Field	Options	?	×
Drop-down item: Excellent Add >> Remove	Items in drop-down list	•	Move
Run macro on			
Entr <u>v</u> :	E <u>x</u> it:		
	~		\sim
Field settings			
<u>B</u> ookmark: Dropdow	m1		
Drop-down enable	d		
Calculate on exit			
Add Help <u>T</u> ext	ОК	Car	icel

7. Repeat Step 6 to add entries for **Good**, **Average**, **Poor**, and **Abysmal**:

Drop-Down Form Fi	Drop-Down Form Field Options		×
<u>D</u> rop-down item:	Items in drop-down	list:	
Add >>	Good Average Poor		Move
<u>R</u> emove	Abysmal	~	•
Run macro on			
Entr <u>v</u> :	E <u>x</u> it:		
	~		\sim
Field settings			
Bookmark: Dropo	lown1]	
Drop-down ena	bled		
Calculate on exi	t		
Add Help <u>T</u> ext	ОК	Car	ncel

8. Click Add Help Text:

Drop-Down Form Fie	ld Options	?	×		
Drop-down item: Add >> Remove	Items in drop-down lis Excellent Good Average Poor Abysmal	t:	Move		
Run macro on					
Entry: Field settings	E <u>x</u> it:		~		
Bookmark: Dropdown1 ✓ Drop-down e <u>n</u> abled Calculate on exit					
Add Help <u>T</u> ext	ОК	Can	icel		

9. The Form Field Help Text dialog box will open. In the "Type your own" field of the Status Bar tab, type, "**Rate your most recent visit only.**" Click **OK**:

Form Field Help Text	?	\times
<u>S</u> tatus Bar Help <u>K</u> ey (F1)		
○ <u>N</u> one		
O AutoText entry:		\sim
<u>Type your own:</u>		
Rate your most recent visit only.		
ОК	Ca	ncel

Drop-Down Form Field Options		?	\times	
Drop-down ite	em: Id >> emove	Items in drop-down l Excellent Good Average Poor Abysmal	ist:	Move
Run macro on				
Entr <u>y</u> :		E <u>x</u> it:		
		~		\sim
Field settings				
Bookmark:	Dropdov	vn1		
Drop-dov	wn e <u>n</u> able	ed		
Calculate	on exit			
Add Help <u>T</u> ex	d	ОК	Car	ncel

10. Click OK in the Drop-Down Form Field Options dialog box:

11. Let us test our new field. Click **Developer** → **Restrict Editing**:



12. You will see the Restrict Editing task pane appear. Check the second box and choose "Filling in forms" from the drop-down menu. Then, click Yes, Start Enforcing Protection:



13. In the Start Enforcing Protection dialog box, click **OK** to start protecting the form without a password:



14. Save the document as Activity 5-2 Complete. Click the drop-down field that we just created. Notice the options available. As well, look at the status bar to see the help text:

AutoSave 💽 🗄 🖌) マ へ Activity 5-2 Complete マ	♀ Search		John Smith 🗾 🖻 — 🗆 🗙
File Home Insert	Draw Design Layout References N	failings Review View Developer Help	Table Design Layout	업 Share Comments
Visual Macros Basic Address Code	cro vrding Add- Word COM ins Add-ins Add-ins Add-ins COM	Design Mode Image: Constraint of the second secon	Document Template Templates	~
L 1	#	§ · 1 · · · 4 · · · 1 · · · \$ · · · 1 · · · 6 · · 3	1 7	Restrict Editing * *
1				Your permissions
1				This document is protected from unintentional editing. You may only fill in forms in this region.
	Store Survey			
	,			
-	Date of Purchase: Click or tap to enter a date.	Product(s) Purchased		
	Store Location:	Click or tap here to enter text.		
-	Was this your first time shopping with us?			
1				
1	How would you rate your shopping experience w	ith us?		
Exce	ellent			
- Goo	ad rage			
Poo	shop with us again?			
Aby	smal			
1				
-	Home Phone Number:	E-Mail Address: Click or tap here to enter text.		
5				
1				Stop Protection
Rate your most recent visit only.			(0)	Focus 🕮 🔳 🌠 - 🛶 + 100%

15. Close Microsoft 365 Word to complete this activity.

TOPIC C: Form Data Conversion

In the last topic, we learned how to use legacy controls, which can store form data in a plain text format. In this topic, we will learn how to access and interpret that data.

Topic Objectives

In this session, you will learn:

- How to save form data as a plain text file
- How form data is saved
- How to link a form to a database
- How to set tab order for controls

Save Form Data as a Text File

Here is a sample form that uses legacy controls. You can see that the form has been filled out:

AutoSave 💽 🗄 🏷 🗸 🗸	Survey - Saved to this PC 👻	, Search								
File Home Insert Draw H File Grecord Macro Gell Pause Recording Basic Macros Courty Code	Design Layout References → ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓	Mailings Revie	w View	Developer Help Block Restrict Authors ~ Editing Protect	Table Design	Layout		ピ Share	Com	ments
	Store Survey									
	Date of Purchase: 2020-07 Store Location: Was this your first time sh Yes ⊠ No□	-01 opping with us?	Product(s 1 Hamster 1 Cage 1 Carrier) Purchased						
	How would you rate your Average	shopping experience	e with us?							
	Would you shop with us a Yes ⊠ No □	gain?								
	Home Phone Number: 955	i-959-9595	Email Add	ress: jsmith@acmev	widgets.com]				
Page 1 of 1 55 words []] English (Cana	da) 🐻 (¹ ‡ Accessibility: Investigate				[D] Focus		50		+	100%

To save form data as plain text, click File \rightarrow Save As \rightarrow Browse:



Then, in the Save As dialog box, click **Tools** → **Save Options**:

🔟 Save As		:	×
← → * ↑ 🗖	> This PC > Desktop >	✓ ♂ Search Desktop	
Organize 🔻 Ne	w folder		
 Quick access Desktop Documents Downloads Dropbox Creative Clou Pictures This PC 	A Name Name Word Files	Date modified Type Size 2020-06-10 3:59 PM File folder	>
File name:	Survey		~
Save as type:	Word Document		\sim
Authors:	John Smith Tag	ags: Add a tag Title: Add a title	
	Save Thumbnail		
▲ Hide Folders		Tools Save Cancel Map Network Drive Save Options General Options Save Options Web Options Compress Pictures	

Click the Advanced category and check "Save form data as delimited text file:"

Word Options	?	×
General ✓ Allow fields containing tracked changes to update before printing Display □ Print on front of the sheet for duplex printing Proofing ☑ Scale content for A4 or 8.5 x 11" paper sizes Save Default tray: Use printer settings Language When printing this document: Image Survey Ease of Access □ Print PostScript over text		
Advanced Print only the data from a form Customize Ribbon		
Quick Access Toolbar		
Trust Center Prompt before saving Normal template ① Always create backup copy Copy remotely stored files onto your computer, and update the remote file when saving Image: Copy remotely stored files onto your computer, and update the remote file when saving Image: Copy remotely stored files onto your computer, and update the remote file when saving Image: Copy remotely stored files onto your computer, and update the remote file when saving		
Preserve fidelity when sharing this document:		
Save form <u>d</u> ata as delimited text file Embed ling <u>u</u> istic data		
General		
 □ Confirm file format conversion on open ☑ Update automatic links at open □ Allow opening a document in Draft view ☑ Enable background repagination □ Show add-in verticate errors Mailing address: 		
ОК	Car	ncel

Click **OK**. You will now be returned to the Save As dialog box, where you can choose the file name and location. Ensure that the file type is set to plain text and click **Save**:

🚾 Save As							×
← → • ↑ 🗖	> This PC	> Desktop >		✓ [™] Se	earch Desktop		Q
Organize 🔻 New	w folder				-	•	?
🖈 Quick access	^	Name	^	Date modified	Туре	Size	
📃 Desktop	*	Word Files		2020-06-10 3:59 PM	File folder		
Documents	*						
👆 Downloads	*						
🐉 Dropbox	*						
😹 Creative Cloue	dFiles 🖈						
Pictures	1						
💻 This PC	*						
Microsoft Word	×	<					>
File name:	Survey Data						~
Save as type:	Plain Text						~
Authors:	John Smith		Tags: Add a tag		Title: Add a title		
∧ Hide Folders				Tools 👻	Save	Cancel	

After you click Save, you will see the File Conversion dialog box:

File Conversion - Store Survey Data.txt		?	×
Warning: Saving as a text file will cause all formatting, pictu Text encoding: Windows (Default) OMS-DOS OOther encoding: Options: Insert line breaks End lines with: CR / LF Allow character substitution Preview:	res, and objects in your file f Wang Taiwan Western European (DOS) Western European (IAS) Western European (Mac) Western European (Windo	to be los	.t.
"Excellent"			*
	ОК	Cance	el

Here you can confirm that the data preview looks correct and then set advanced options. When you are ready, click **OK**. The file will now be saved as plain text.

How Data is Saved

When you open a plain text file that contains form data, you will see the information that was entered in the fields:

Survey Data - Notepad	
File Edit Format View Help	
"July 1, 2020","1 widget 1 hammer 12 nails","Center City",1,0,"Average",1,0,"999-650-5342","john@acme.com"	

Most of the data should be quite readable. Checkboxes will be represented as 1 for Yes and 0 for no, with the first number representing the selected value.

Linking the Form to a Database

You can also use macros to link the form to a database so that data in legacy controls is automatically transferred when the form is completed. To do this, you must identify each control with a bookmark name:

Text Form Field Options			?	×
Text form field				
Ту <u>р</u> е:		D <u>e</u> fault text:		
Regular text	\sim			
Maximum length:		Text <u>f</u> ormat:		
Unlimited	÷			\sim
Run macro on				
Entry:		E <u>x</u> it:		
	\sim			\sim
Field settings				
Bookmark:		7		
Home Phone Number				
Fill-in enabled		_		
<u>Calculate on exit</u>				
Add Help <u>T</u> ext		ОК	Car	ncel

You can then create a button to execute the macro and transfer the data in each form field to the appropriate database field:

How would you rate your shopping experience with us? Poor			
Would you shop with us again? Yes 🛛 No 🗆			
Home Phone Number:	E-Mail Address:		
Submit 🔉			

The process for coding this type of macro requires advanced Access and Visual Basic knowledge, and is beyond the scope of this manual.

Modifying Tab Order

In order to speed up data entry, form developers often choose to set the order in which fields are selected when the user presses the Tab key. Unfortunately, there is no interface command for this feature when using Word forms. You must manually code a macro to achieve this. This process requires advanced knowledge of Visual Basic, and is beyond the scope of this manual.

Activity 5-3: Converting Form Data

In this activity, you will fill out a form, save the data as plain text, and view the converted file.

1. Open Microsoft 365 Word and create a new document based on Activity 5-3:



2.	Fill out the
	form by
	entering
	data in the
	appropriate
	fields and
	using the
	provided
	controls:

Audoter Coll Convertify Search Audoters: December 1 Convertify								
Nome Insert Dave Design Layout Provide Part of the State of the Stat	kutoSave 💽 🗄 🏸 🏷 🖘 🛛 Document	t12 - Word 🔑 Search			John Smith	<u>IS</u> 🖬	- 0	
	le <u>Home</u> Insert Draw Design Layout R	References Mailings Review View Deve	loper Help Table Design Layout			년 Sha	re 🛛 🖓 Comme	ents
Clipbard G Fort G Purgraph G Sytes G Editing View Sensitivity Editor	$\begin{array}{c c} & & & \\ & & & \\$	Ap ∷ + ∷ + ∷ + ∷ + ∷ + ∷ + ∴ + (+	ABBCCDX AABBCCDX AABbCCC AAbbCCC AbbCCC AbbCCC AbbCCC AbbCCC AbbCCC AbbCCCC AbbCCCC AbbCCCC AbbCCCC AbbCC	B C Find C C Repla	ce Dictate	Sensitivity	Editor	
Store Survey Image: Store Location: Center City Product(s) Purchased Store Location: Center City 1 undget Was this your first time shopping with us? 22 mails Image: Im	Clipboard Fs Font	G Paragraph G	Styles	5 Editing	Voice	Sensitivity	Editor	~
How would you shop with us again? Would you shop with us again? Mo Yes No Home Phone Number: 999-650-5382 E-Mail Address: @hn@acme.com	8	Store Survey Date of Purchase: July 1, 2020 Store Location: Generic City Was this your first time shopping with us? Yes Yes	Product(s) Purchased I Weiget I Thannar IZ nais					
Would you shop with us again? Yes No Home Phone Number: 1999-650-5342 E-Mail Address: phn@acme.com		How would you rate your shopping experience wi	th us?					
Home Phone Number: 999-650-5342 E-Mail Address: [phm@acme.com		Would you shop with us again?						
Page 1 of 1 👋 words 🖂 Facilità d'Inited States) 🖾 da àrressibilità Investigate 👘 Facilità d'Inited States) 🕅 🗐 🕅 – 🔳 +	r1of1 Symonys III Facilite/Delted Outen III (As)	Home Phone Number: 999-650-5342	E-Mail Address: john@acme.com	(D) Forus	00 m	國		100%

3. Next, click File → Save As → Browse:



4. In the Save As dialog box, click **Tools** → **Save Options**:



5. Click the Advanced category. Scroll to the "Preserve fidelity when sharing this document" section. Check "Save form data as delimited text file:"

Word Options	?	×
General Always create backup copy		
Display V Allow background saves		
Proofing		
Save Preserve fidelity when sharing this document:		
Language Save form <u>data</u> as delimited text file		
Ease of Access		
Advanced General		
Customize Ribbon Confirm file format conversion on open		
Quick Access Toolbar Update a <u>u</u> tomatic links at open		
Allow opening a document in Draft view		
Enable background repagination		
Show add-in <u>u</u> ser interface errors		
mailing agoress:		
Eile Locations Web Options		
Layout options for: Document12 💌		
Add space for underlines		
Adjust line height to grid height in the table		
Allow hyphenation between pages or columns.		
□ Balance SBCS characters and DBCS characters		
Convert <u>b</u> ackslash characters into yen signs		
Don't center "exact line height" lines		
Don't expand character spaces on a line that ends with SHIFT+RETURN		-
ок	Ca	ncel

Click OK.

Back in the Save As dialog box, change the location to your desktop. Enter "Activity 5-3
 Complete" as a file name. Make sure the file type is set to Plain Text. Click Save:

🚾 Save As							\times
← → • ↑ 	→ This PC →	Desktop →		✓ [™] S	earch Desktop		P
Organize 🔻 🛛 Ne	w folder				•	•	?
🗸 📌 Quick access	^	Name	^	Date modified	Туре	Size	
📃 Desktop	1	Word Files		2020-06-10 4:34 PM	File folder		
Documents	1						
👆 Downloads	*						
🐉 Dropbox	*						
😹 Creative Clou	ıd Files 🖈						
Pictures	*						
💻 This PC	*						
> 🕅 Microsoft Wor	d 🗸 Y	¢					>
File name:	Activity 5-3						\sim
Save as type:	Plain Text						\sim
Authors:	Jan Bates		Tags: Add a tag		Title: Add a title		
∧ Hide Folders				Tools 👻	Save	Cancel	

7. Click **OK** in the File Conversion dialog box to complete the process:

File Conversion - Activity 5-3 Complete.txt		?	×
Warning: Saving as a text file will cause all formatting, pictur Text encoding:	Wang Taiwan Western European (DOS) Western European (IAS) Western European (ISO) Western European (Mac) Western European (Windo	to be lo	st.
"July 1, 2020","1 widget □1 hammer □12 nails","Center City",1,0,"Average",1,0,"999-650-5342 □	","john@acme.com"		^
	ОК	Cano	el

- 8. Close Microsoft 365 Word. Do not save any changes to the document.
- **9** Find the document you saved to your desktop and double-click it:



Activity 5-3 Complete **10.** Notepad (or a similar program) should open and you will see the data that you entered:

Activity 5-3 Complete - Notepad	-	\times
File Edit Format View Help		
"July 1, 2020","1 widget		^
1 hammer 11 anile" "Contan City" 1.0 "Avanage" 1.0 "990 EE0 E242" "JohnGorge com"		
12 Halls , Center City ,1,0, Average ,1,0, 555-002 , Julnigatine.com		
		\sim
		>

11. Close Notepad to complete this activity.

Summary

In this lesson, you learned how to create Microsoft Word forms. We began with a look at the basic process of designing a form, adding controls, modifying those controls, and protecting it. We also learned how to use legacy form controls and what advantages they provide, particularly when saving form data as plain text or linking it to a database.

LESSON 6: MANAGING DOCUMENT VERSIONS

Lesson Objectives

In this lesson you will learn how to:

- Create a new document version using Microsoft Word and Microsoft SharePoint Server
- Compare document versions
- Merge document versions

TOPIC A: Create a New Document Version

In order to facilitate document collaboration and management, Microsoft Word integrates with Microsoft SharePoint Server. In this topic, you will learn how to access Microsoft Word documents from a SharePoint server and how to use its powerful versioning features.

Note that for these examples, we will be using a SharePoint Server hosted as part of Microsoft Office 365 services. If your organization is using an internal server, the images that you see may be different.

Topic Objectives

In this session, you will learn:

- What Microsoft SharePoint Server is
- About versioning and major versus minor versions
- How to enable versioning on a SharePoint server
- How to access Microsoft Word documents from a SharePoint server
- How to check out, check in, and upload Microsoft Word documents

Microsoft SharePoint Server

Microsoft SharePoint Server is an online repository and collaboration space where information can be shared within an organization.

Members of an organization can use Microsoft Edge (or other modern web browsers) to connect to the SharePoint server anywhere they have access to the internet:

🖻 🖅 🚺 Microsoft Offic	e Home 🚯 ABC Widgets Inc - Hom X + 🗸	- 🗆 🗙
\leftarrow \rightarrow O \Leftrightarrow	https://acmewidgets.sharepoint.com/ABC%20Widgets%20Inc/SitePages/Home.aspx	
::: SharePoint		д 🏼 ? 🐽
BROWSE PAGE		🖓 SHARE 🟠 FOLLOW 🖌 EDIT 🔁
s	ABC Widgets Inc Team Blog / EDIT LINKS ABC Widgets Inc	Search this site • P
Home Notebook Documents Recent Team Calendar Weekly Priorities Templates and Resources	Get started with your site REMOVE THIS	Your site. Your brand.
Pages Site contents ✓ EDIT UNKS	Newsfeed Start a conversation It's pretty quiet here. Invite more people to the site, or start a conversation.	Documents
		Drag files here to upload

Versioning

While the modern office may still require a lot of paper, most important information and records are now kept primarily in electronic format. It is common for documents to undergo a series of changes in their lifetime, so keeping track of what was changed when is important. This process is referred to as **versioning**. As of this writing, in Microsoft 365 versioning is turned on by default in SharePoint libraries and off by default in SharePoint lists.

Versioning Settings

To enable versioning in a SharePoint Server library, open the desired library. Then, click **Settings** \rightarrow **Library settings**:



(You may require administrative privileges to access this command.)

When the list of library settings appears, click Versioning settings:



The Versioning Settings page will open. You will see versioning settings on the right-hand side of the window:

🖻 🖅 🧐 Microsoft Office	e Home 🚯 Document Library Versii 🗙 🕂 🗸	X
\leftarrow \rightarrow O \Leftrightarrow	https://acmewidgets.sharepoint.com/ABC%20Widgets%20Inc/_layouts/15/LstSetng.aspx?List=%7B61CD366A%2D68	92%2D4D7A%2D84F4%2D20BCB3 🔟 🛧 🖆 🗠
::: SharePoint		_ ⊗ ? <u>(</u> s
		🖸 SHARE 🏠 FOLLOW 🔁
5	ABC Widgets Inc Team Blog / EDIT LINKS Settings - Versioning Settings	
Home Notebook Documents	Content Approval Specify whether new items or changes to existing items should remain in a draft state until they have been approved. Learn about requiring approval.	Require content approval for submitted items? O Yes
Recent Team Calendar Weekly Priorities Templates and Resources	Document Version History Specify whether a version is created each time you edit a file in this document library. Learn about versions.	Create a version each time you edit a file in this document library? Create major versions Example: 1, 2, 3, 4 Create major and minor (draft) versions Example: 10, 11, 12, 20
Pages Site contents		Keep the following number of major versions: 500 Keep drafts for the following number of major versions:
	Draft Item Security Draft see minor vestions or items which have not been approved. Specify which users should be able to view drafts in this document library. Learn about specifying who can view and edit drafts.	Who should see draft items in this document library? Any user who can read items Only users who can earlitems Only users who can approve items (and the author of the item)
	Require Check Out Specify whether users must check out documents before making changes in this document library. Learn about requiring check out.	Require documents to be checked out before they can be edited? Ves No
		OK Cancel

Simply choose the desired options and click **OK** at the bottom of the page.

Major versus Minor Versions

Version numbering in SharePoint is fairly straightforward. A file version number is typically in the format **MajorRevision.MinorRevision**. For example, version 3.5 means that there have been five minor revisions to this third major revision. How you classify a major or minor revision is up to you. You can even choose to use major versions only and omit the minor version number.

Consider a standard operating procedure document (SOP) for the production of a widget. A minor revision to the SOP might include a new subsection or an address change. A major revision might include adding or removing an entire section from the SOP.

Accessing Documents Directly from a SharePoint Site

To open a document stored on a SharePoint server, right-click it and click **Open** \rightarrow **Open in app**:

🖻 🖅 🧯 Microsoft Office	ice Home 🚯 ABC Widgets Inc - Doc. × + · ·		-		×
\leftrightarrow) \odot \Leftrightarrow)	A https://acmewidgets.sharepoint.com/ABC%20Widgets%20Inc/Shared%20Documents/Forms/Allitems.aspx?viewpath=%2FABC%20Widgets%20Inc%2FS 🛄 📩	∱≡	h	Ŀ	
::: SharePoint	,⊅ Search 😋	Q	۲	?	JS
AW ABC Wi	/idgets Inc *	Not follov	ving	් Sha	ire
Home	🧱 Open 🗸 🖄 Share 🛄 Publish 👁 Copy link 🞍 Download 📋 Delete 🤫 Pin to top 🛋 Rename 🕫 Automate 🗸 \cdots 🛛 🗙 🗮 All Docur	ments \vee	∇	0	2
Notebook					^
Documents	Documents				
Pages	$\begin{tabular}{lllllllllllllllllllllllllllllllllll$				
Site contents	📀 💼 ³⁴ Annual Report Open > Open in browser https://www.ser				
Edit	Preview Open in app Share Share Copy link Manage access Download Delete Automate Nore Pin to top Move to Copy to Copy to				
	Version history Alert me More > Details				

The document should automatically load into the desktop version of Word. You may also be prompted to enter your username and password. Once your credentials have been verified, the file will open:



This file is still saved on the SharePoint server. Therefore, if you click **Save** in the Quick Access toolbar or click **File** \rightarrow **Save**, you will be directly saving the file to SharePoint. You will notice that the Save command looks a bit different because of this:



As well, when saving content to a SharePoint server, you may be asked to enter your username and password to complete the operation.

Begin Working with Document Versions

Upload One or More Documents to the SharePoint Server

To add items to a SharePoint server library, simply drag and drop the file into the SharePoint window. Alternatively, click **Upload** → **Files** in the document library:

🖻 🖅 🚺 Microsoft Office	e Home 🚯 ABC Widgets Inc - Doci X –	+ ~				_		×
\leftarrow \rightarrow O \Leftrightarrow	https://acmewidgets.sharepoint.com/ABC%20V	Vidgets%20Inc/Shared%20Documents/Forms/Allitems.aspx?viewpath	=%2FABC%20Widgets%20Inc%2FS	□ ☆	∱≡	h	È	
::: SharePoint	م	Search						ZL
AW ABC Wi	dgets Inc			ÅΝ	lot follow	ing	🖻 Shar	re
Home	+ New \checkmark $\overline{\uparrow}$ Upload \checkmark \checkmark Quick edit \bigcirc	🗟 Sync 🖷 Export to Excel 🛛 🌣 Power Apps 🗸 🧬 Automate 🗸	··· =	All Docum	ents \vee	∇	0	2
Notebook								^
Documents	Template							
Pages	🗋 Name 🗸	Modified \checkmark Modified By \checkmark + Ad	d column 🗸					
Site contents	Annual Report.docx	A few seconds ago John Smith						
Edit	Schedule.xlsx	May 27 Jane Gibson						

Then, the Upload Document dialog box will appear and let you browse your computer for the file(s) you need to upload. Click **Open** to begin the upload:



Checking Out a Document with the SharePoint Server

In order to keep track of what is happening with documents that are uploaded to a SharePoint server, you can use the Check In/Check Out commands. This system works just like a library or video rental store. Once the item has been added to the repository, it can be checked out, used in some way, and then checked back in.

While an item is checked out, it can be modified by others if necessary, but the item will be opened as read-only to discourage editing. Different user accounts have different permission settings, so check with your SharePoint administrator for specific file permission restrictions. We recommend you wait until a checked-out document is restored before attempting to modify it.

In order to check out a file, you will need to select it. Do this by clicking the box to the left of the file name:



With the file selected, click the **ellipses** ($^{\dots}$) \rightarrow **More** \rightarrow **Check Out**:

→ Ŭ ŵ	A https://acmewidgets.sharepoint.com/ABC%20Widg	ets%20Inc/Shared%20Documents/Forms/Allitems.aspx?viewpath='	962FA
SharePoint	,⊖ Se	arch	
AW ABC W	idgets Inc		
Home	🔄 Open 🗸 🖻 Share 🛄 Publish 📀 Copy link	🞍 Download 📋 Delete 👎 Pin to top 🖷 Rename 🔗 Au	utom
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		Alert me Compliance details	
		Check out	

You will be notified that the file has been checked out:

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$\leftarrow \rightarrow \circlearrowright \ \ \ \ \ \ \ \ \ \ \ \ \$									
::: SharePoint		𝒫 Search			JS				
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Notebook	Documents			Checked out 1 item Done					
Documents									
Pages	\square Name \lor	Modified \vee	Modified By \checkmark + Add column \checkmark	Done Executive Report docx					
Site contents	Annual Report.docx	8 minutes ago	John Smith						
Edit	Secutive Report.docx	년 : 4 minutes ago	John Smith						
	Schedule.xlsx	May 27	Jane Gibson						

The check-out notification to the right of the file name will identify that the file has been checked out:



You can now download, edit, and save it as previously discussed.

Checking in a Document with the SharePoint Server

Once you are finished with the document, you can check it back in, or if you do not want to commit any changes, you can discard the check out. Both commands can be found by selecting the file, and right-clicking the ellipses (\cdots) \rightarrow More \rightarrow Check in (or, Discard check out):

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- > O @	A https://acmewidgets.sharepoint.com/ABC%20Widgets%2	20Inc/Shared%20Documents/Forms/AllItems.aspx?viewpath=%2FA
SharePoint	, ○ Search	
AW ABC W	'idgets Inc	
Home	🚾 Open 🗸 🖻 Share 🛄 Publish 👁 Copy link 🞍	Download 📋 Delete 🕂 Pin to top 🛋 Rename 🔗 Automa
Notebook	Desuments	
Documents	Documents	
Pages	🗅 Name 🗸	Modified \checkmark Modified By \checkmark + Add column
Site contents	Annual Report.docx	Open > hn Smith
Edit	😒 👜 ²¹ Executive Report.docx 🖄	Preview hn Smith
	Schedule.xlsx	Share re Gibson
		Manage access
		Download
		Delete
		Automate > Bename
		Pin to top
		Move to
		Copy to Properties
		Version history Workflow
		More Check in 0.
		Details Discard check out

If you click **Discard check out**, you will be prompted to check in any unsaved changes. If you click Check In, you will be prompted to set your version options and add a comment. Then click **Check in**:



The document will now be checked in.

Checking Out a Document Using Word 365

You can also check out a document after it has been opened in Microsoft Word 365. Click File → Info → Manage Document → Check Out:

The document will then be checked out. (You may be prompted to enter your user name and password before this can be done.)



Checking in a Document Using Word 365

To check a document back in, click File \rightarrow Info \rightarrow Check In:



(Notice that you can also discard the check out from here.) You can now enter the details of the check in:

Check In	?	×					
Version Type							
What kind of version would you like to check in?							
1.1 Minor version (draft)							
2.0 Major version (publish)							
Version Comments							
Added information about the upcoming Executive me	eeting.						
Keep the document checked out after checking in this version.							
ОК	2	Cancel					

Once you click **OK**, the file will be checked back in.

View the Version History of a Document

To view the version of a document, select the file on the SharePoint server and click the ellipses and select **Version history**:



Version history will be shown. Click the **X** to close once you are finished.

elete	e All Versions Delete Minor \	/ersions			
lo. ∔	Modified	Modified By	Size	Comments	
.1	6/17/2020 8:01 AM	John Smith	21.6 KB	Added information about the upcoming Executive meeting.	
'his i	s the current published major	version			
.0	6/17/2020 7:56 AM	John Smith	21.2 KB	Updated the report.	
1	6/17/2020 7:43 AM	John Smith	20.7 KB		

Activity 6-1: Creating a New Document Version

In this activity, you will upload a document to a SharePoint server and then open it with Microsoft Word. Access to a SharePoint server that has versioning enabled in the Documents library is required to complete this activity.

1. Open your browser and navigate to your SharePoint site:



2. Open the Documents library. Click **Upload** \rightarrow **Files**:



3. Browse to the Lesson 6 folder of your Exercise Files. Select Activity 6-1 and click Open:

Open						×
\leftarrow \rightarrow \checkmark \uparrow \square << Desktop \Rightarrow Word Files \Rightarrow Exercise	√ Ū	Search Lesson 6	Q			
Organize 🔻 New folder					= • 🔟	?
 OneDrive 	^	Name	^	Date mo	dified	Туре
left oneDrive - Velsoft		Activity 6-1		2020-06-	17 10:39	Microso
📙 OneDrive for Business – Unsynced Changes		Logo		2020-05-	06 11:20	JPG File
PicStream						
E Pictures						
🕐 Saved Games						
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🙊 SkyDrive.old	÷.					
Tracing						
📕 Videos						
🛄 This PC						
P (3	×	<				>
File name: Activity 6-1			\sim	All files		\sim
				Open	Cance	el:
4. Now, let us test the document out. Right-click it and click "Open → Open in app:"



5. The document will open in Microsoft 365 Word:

AutoSave 💿 💿 😼 🏷 🗸 🗢	Activity 6-1 x ⁹ - Last Modified: 3m ago 🛛 🔎 Searc	'n	John Smith 🗾 📼 — 🗆 🗙
File Home Insert Draw Des	ign Layout References Mailings Revie	w View Developer Help Table I	Design Layout 🖻 Share 🖓 Comments
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	Salesperson Job	Payment Terms Due Date	
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un .			
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Page For Filzo words LU English (United S	states) E (X Accessionity: Investigate	قل	, Pocus EB EB = + 100%

6. We need to add a logo to this document. First, let us check it out. To do this, click File →
 Info → Manage Document → Check Out:



7. Now, right-click the Logo placeholder in the document and click Change Picture → From a file:

AutoSave 💽 🐺 🏷 - 💍 🗢 .	Activity 6-1 x ^R - Last Modified: 11m ago 🛛 🔎 Searc	'n		John Smith 🕼 🖭 — 🗆 🗙
File Home Insert Draw Desi Patter Century Gothic (=) A. A. B Patter B I U = ab x, x' A Clipboard fo Font	ign Layout References Mailings Review Aa → A ₀	View Developer Help AdBbCcDo ACI AdBbCc 1 Contact 11 Heading 1 11 Heading Styles	Picture Format Table Design Layou DD AntioCoDe AddoCoDe V 1 Right-ali. V 5 5 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6	t Comments
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	Solespenon Bit Solespenon Bit Ghy Bit Bit Send to Back Co Link	Image: Second and Second an	Unit Price Une Total	
	Igtert Caption Image: State of the state of the			

8. Use the Insert Picture dialog box to open the Lesson 6 sub-folder of your Exercise Files folder. Select the **Logo** file and click **Insert**:

Insert Picture		×
\leftarrow \rightarrow \checkmark \Uparrow — Cesktop \Rightarrow Word Files \Rightarrow Exercise Files \Rightarrow Lesson 6	✓ ♂ Search Lesson 6	Q
Organize 🔻 New folder	• •	?
 OneDrive OneDrive - Velsoft OneDrive for Business – Unsynced Changes PicStream Pictures Saved Games Searches SkyDrive.old Tracing Videos This PC 		
File name: Logo	→ All Pictures	~
	Tools Insert Cance Cance	

9. The logo will be inserted:

AutoSave 🚥 ほりーひゃ Acti	vity 6-1 $\mathbb{A}^{\mathbf{R}}$ - Last Modified: 17m ago	₽ Search		John Sm	ah 🚯 🖽 — 🗆 >
File Home Insert Draw Design	Layout References Mailir	ngs Review View Developer Help	Picture Format Table Design	Layout	음 Share 🖓 Comments
Paste B I U ~ ab x, x ² A A A	a• Ap ⊟ • ⊟ • H= • ⊡ • ▲ • ■ = = = ≡ •		CcDc AatoCcDc AatoCcDc × c	O Find ↓ k Replace k Select ↓ ↓ Dictate	Sensitivity Editor
Clipboard 15 Font	rs Paragraph	rs 50	iles 15	Editing Voice	Sensitivity Editor
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1	Salesperson	Job Poyment Terms	Due Date		
		Due on receipt			
	Gity Description		Uni Pice Une Total		

10. Now, let us check the document back in. Click File \rightarrow Info \rightarrow Check In:



 The Check In dialog box will open. Select "Major version" from the Version Type list. Type, "Added logo" for the Version Comments. Click OK:

Check In	?	×
Version Type		
What kind of version would you like to check in? 0.2 Minor version (draft) 1.0 Major version (publish) 0.1 Overwrite the current minor version		
Version Comments		
Added logo		
Keep the document checked out after checking in th	is version	Cancel

Switch back to your internet browser, which should still be displaying your SharePoint site. The file that we have been working with should still be selected. Click the ellipses (
) → Version history →:



13. You should see the major version that you just uploaded, with the relevant comment:

ersion history				
elete All Versions Delete Minor Versions				
o. 4 Modified	Modified By	Size	Comments	
his is the current published major version		70.4 //2		
.0 6/17/2020 7:19 AM	John Smith	70.1 KB	Added logo	
.1 6/17/2020 6:59 AM	John Smith	55.5 KB		

14. Close all open windows to complete this activity.

TOPIC B: Compare Document Versions

For even more powerful document control, you can use SharePoint's version management tools with Microsoft Word's reviewing tools. In this topic, we will learn how to compare different document versions.

Topic Objectives

In this session, you will learn:

- About the Compare feature
- How to compare document versions

The Compare Feature

As discussed in Topic 1-D, Microsoft Word's **compare** feature is also known as **legal blackline** because of the way it marks up documents. This feature will compare two documents and show the changes between them, without altering the original documents. When you are working with a document that has been checked out from Microsoft SharePoint Server, you will have additional

options to access various versions of a document. Of course, this only works as long as the feature has been enabled and if multiple versions of the file exist on the server.

Compare Document Versions

To compare a Microsoft Word document stored on a SharePoint server to other versions of that document, first check the document out and open it in Microsoft Word. Then, click **Review** \rightarrow **Compare** and choose the version that you want to compare the document with:



Microsoft Word will then retrieve the version history. When it is finished, the Comparison Settings dialog box will open. Here, you can choose the target version, set your options, and click **Compare**.

Versions saved for Annual Report					?	×
Versions saved to: <u>https://acmewidgets.sharepoint.com/ABC Widgets Inc/Shared Documents/</u>						
No.	Modified 🔻	Modified By	Size	Comments		
0.4	2020-06-17 1:43 PM	John Smith	54.3 KB			
0.3	2020-06-17 1:43 PM	John Smith	54.3 KB			
0.2	2020-06-17 1:41 PM	John Smith	55.4 KB			
0.1	2020-06-17 11:35 AM	John Smith	55.4 KB			
More	>>>			Compare	Clo	ose

The comparison will now take place and the results will be displayed as normal:



Summary

In this lesson, we focused on the tools available when using Microsoft SharePoint Server with Microsoft Word. We learned how to create, manage, and compare document versions.

APPENDICES

Keyboard Shortcut Quick Reference Sheet

ment	Open a new document	Ctrl + N
	Save a file	Ctrl + S
anage	Open a file	Ctrl + O
File M	Print document	Ctrl + P
	Close Microsoft Word	Alt + F4
	Select all	Ctrl + A
	Copy text	Ctrl + C
	Cut text	Ctrl + X
ing	Paste text	Ctrl + V
t Edit	Toggle Format Painter on	Ctrl + Shift + C
Tex	Undo last action	Ctrl + Z
	Redo last action	Ctrl + Y
	Get help	F1
	Check spelling	F7
slo	Apply bold formatting	Ctrl + B
ng Too	Apply underlining	Ctrl + U
matti	Apply italic formatting	Ctrl + I
xt For	Align text to center	Ctrl + E
Тех	Align text to left	Ctrl + L

	Align text to right	Ctrl + R
	Justify text	Ctrl + J
	Increase font size	Ctrl + Shift +.
	Decrease font size	Ctrl + Shift +,
	Cycle through cases	Shift + F3
	Clear formatting	Ctrl + Spacebar
	Create hyperlink	Ctrl + K
	Switch to Outline view	Alt + Ctrl + O
	Promote a paragraph	Alt + Shift + Left Arrow
	Demote a paragraph	Alt + Shift + Right Arrow
,	Demote to body text	Ctrl + Shift + N
line View	Move selected paragraphs up or down	Alt + Shift + Up Arrow/Down Arrow
Out	Expand/collapse text under a heading	Alt + Shift + Plus Sign/Minus Sign
	Expand or collapse all text or headings	Alt + Shift + A
	Hide or display character formatting	Numeric Slash
	Show first line of body text/all body text	Alt + Shift + L
	Show all headings up to <x> heading</x>	Alt + Shift + Heading #
	Mark a table of contents entry	Alt + Shift + O
ences	Mark a citation	Alt + Shift + I
Refer	Mark an index entry	Alt + Shift + X
œ	Insert a footnote	Alt + Ctrl + F

Insert an endnote	Alt + Ctrl + D
Update table	F9
Turn Track Changes on	Ctrl + Shift + E

Glossary

AutoCorrect

A feature that automatically corrects text as you type, including common typos, mathematical symbols, and capitalization.

Backstage view

A component of the interface that shows a number of categories that group file-related commands together.

Bibliography

A list of all sources in a document.

Blog

Online journal that can include text, photos, and/or videos.

Bookmark

A hidden indicator used to mark key points in a document.

Building Blocks

Pre-formatted elements that can be combined to create a cohesive look for a Microsoft Word document.

Caption

Descriptive text added to an illustration or graphic.

Citation

A brief explanation of source text in a document.

Combine feature

Tool used to merge two documents together.

Compare feature

Tool used to view differences between two documents.

Concordance file

Special type of text document that can be used to automatically mark index entries.

Contextual tabs

Special tabs that appear when you are working with a specific object.

Cross-reference

Inter-document links to bookmarks, objects, etc.

Design mode

Special form editing and testing mode.

Digital certificate

Electronic document that validates a user's identity.

Digital signature

Electronic signature created with a digital certificate. Used to verify authenticity and integrity of a file.

Document Inspector

Tool that automatically scans a document for various types of information. Also allows the user to remove that information.

Endnotes

A number or letter that refers the reader to a note at the end of the current section or the end of the document.

Font

A complete set of characters, including typeface and style.

Footnote

A number or letter that refers the reader to a note at the end of the current page.

Form field

Controls that allow users to interact with forms in an electronic format.

Form

An electronic or paper document used to gather information.

Formatting marks

A set of characters that indicate spaces, formatting, page breaks, and other document features that are usually hidden.

Format Painter

A tool that is used to copy formatting from one selection of text to another.

Hyperlink

Interactive text that takes the reader to another location or file.

Illustration

A graphic created in or inserted into a Microsoft Word document.

Index

Lists topics, words, and/or phrases and the location for each item.

Legacy controls

Form controls that provide a simple user interface and allow data to be extracted using basic methods.

Macro

A small program that is created to complete a specific task or set of tasks.

Mark as Final

Feature that puts editing restrictions on the document to indicate that it is the final version.

Master document

Tool used to simplify long documents by breaking them into subdocuments that can be stored outside of the master document.

Metadata

Information about a file, such as who created it and when it was last modified.

Microsoft SharePoint Server

Online repository and collaboration space where information can be shared within an organization.

Microsoft Visual Basic for Applications

Program used to edit Visual Basic code within Microsoft Office.

Navigation Pane

Feature that allows the user to view important parts of a document. Also provides search tools.

OneDrive

Microsoft's cloud-based solution for storing and sharing files. Formerly known as SkyDrive.

Organizer

Tool that allows the user to manage macros and styles in documents and templates.

Outline view

Special view used to create document outlines and work with master and subdocuments.

Quick Access Toolbar

Customizable toolbar providing quick access to frequently used commands.

Ribbon interface

The group of commands at the top of the Microsoft Word screen. Encompasses File tab, Quick Access toolbar, tabs, and groups.

Source

Any resource used in creating a document.

Status bar

Horizontal bar at the bottom of the Microsoft Word window that displays information about the document.

Style

In Microsoft Word, a saved set of formatting options.

Table of authorities

Lists the cases, statutes, and other references in a legal document.

Table of contents

Lists the major headings in a document.

Table of figures

Lists all of the graphics, equations, and tables in a document.

Task pane

Vertical pane that provides additional commands for a task.

Template

A document that usually contains preformatted styles, graphics, objects, and/or sample text.

Track Changes

Feature that records every change to the document, as well as when that change was made and who made it.

Versioning

Process that keeps track of what was changed in a document and when it was changed.

XML

Stands for eXtensible Markup Language. Provides a set of rules and protocols for storing data.

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