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

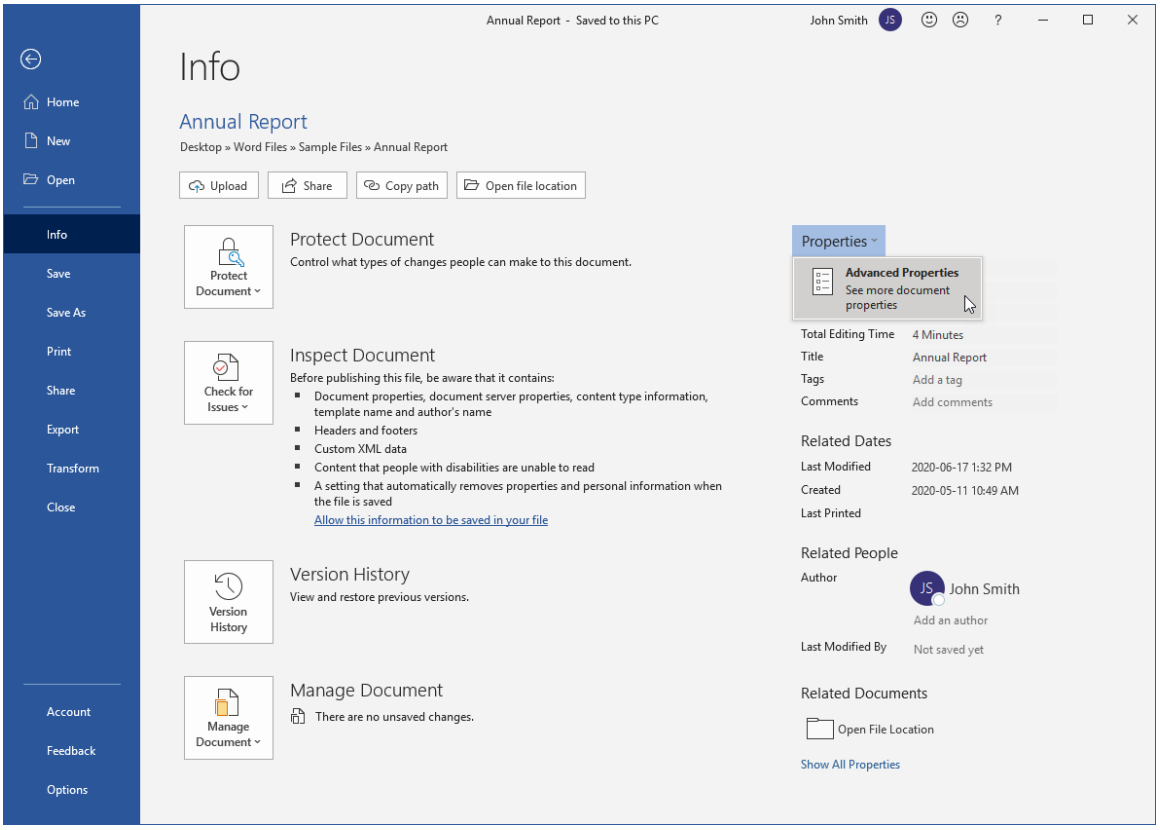
In this topic, you will learn:

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

Viewing File Properties

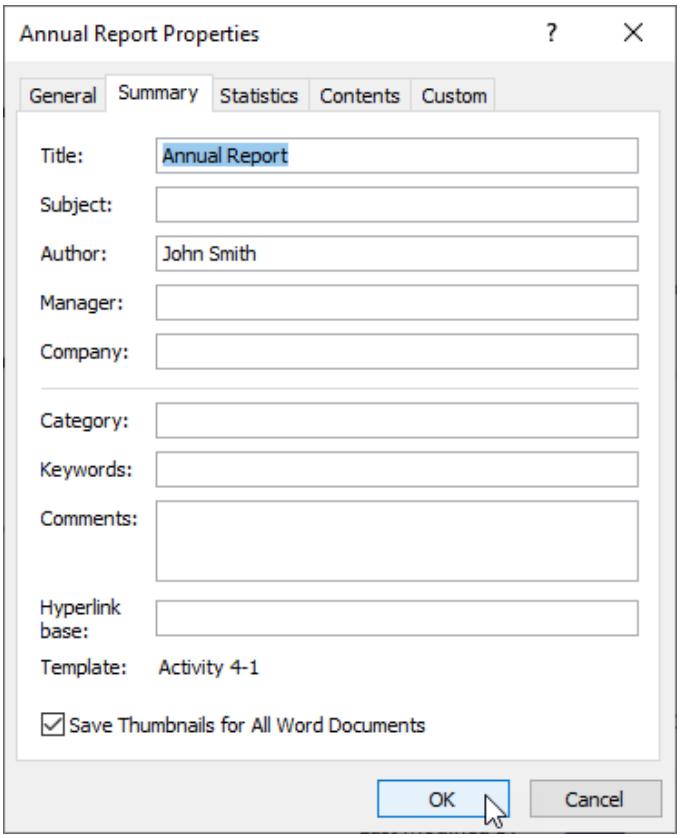
In Microsoft 365 Word, you can view, add, or edit the properties of a document only in the desktop version. These properties can include who authored the document, date information, and more. Referred to as **metadata**, this information can be very useful when collaborating with other users.

To view the properties of an open document, click **File → Info → Properties → 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:



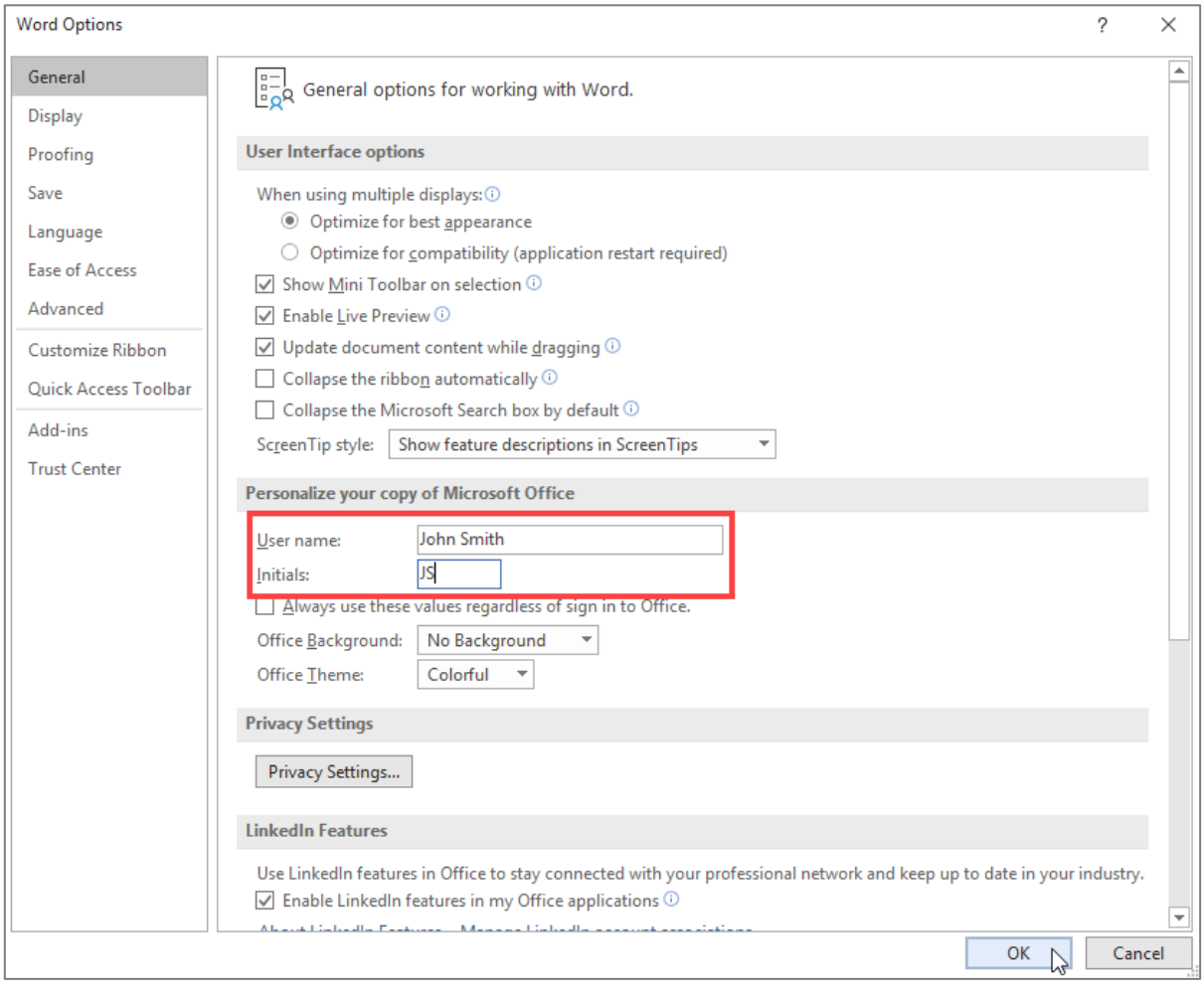
Enter the desired information and click **OK** to save your changes.

User Information

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

.

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



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

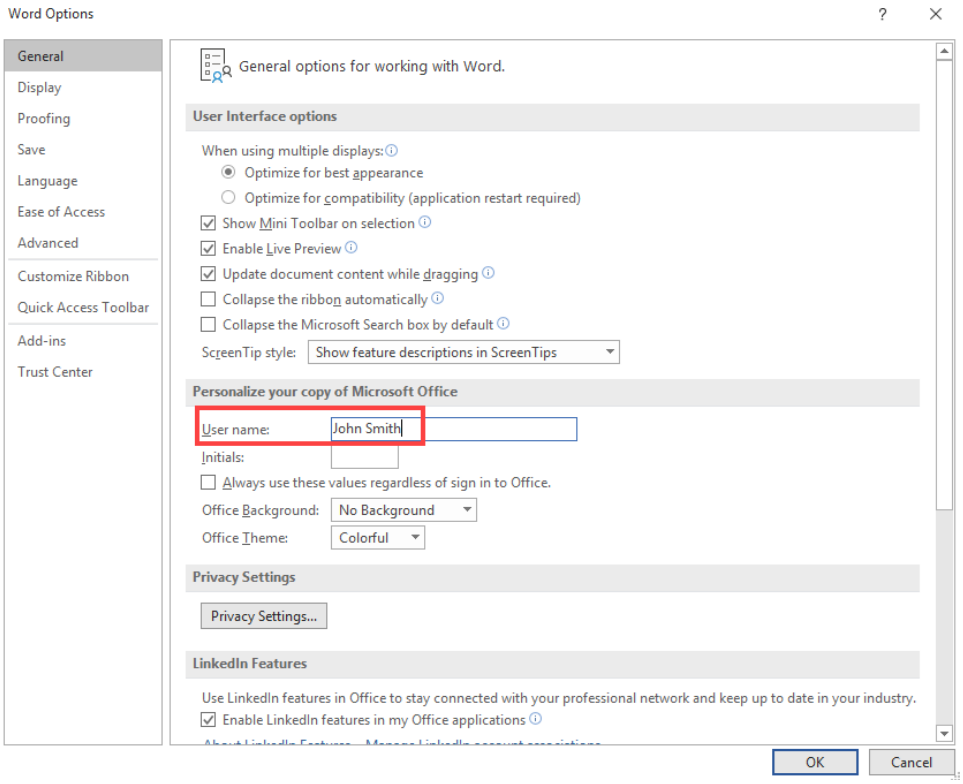
Activity 1-1: Modifying User Information

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

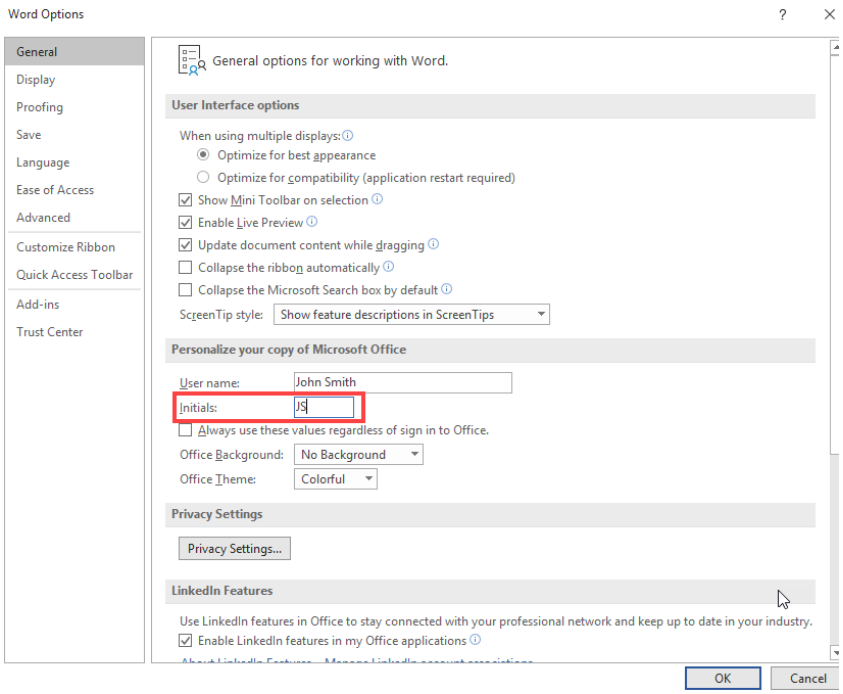
1. Open Microsoft 365 Word and open Activity 1-1.

2. First, let us check your user information. Click **File → Options**:

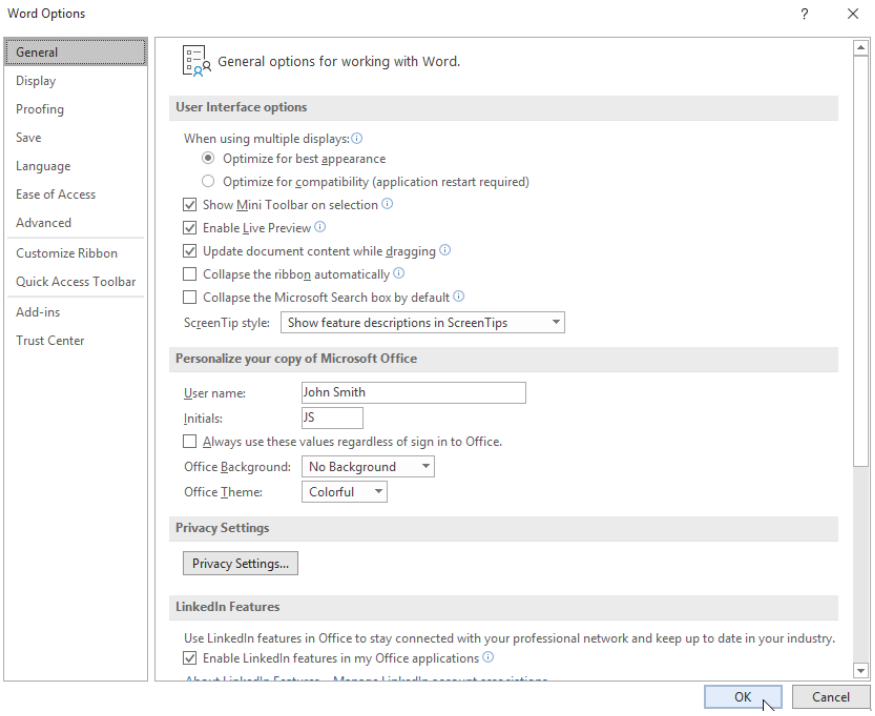
3. The General category should be open. Click in the "User name" field and type your name:



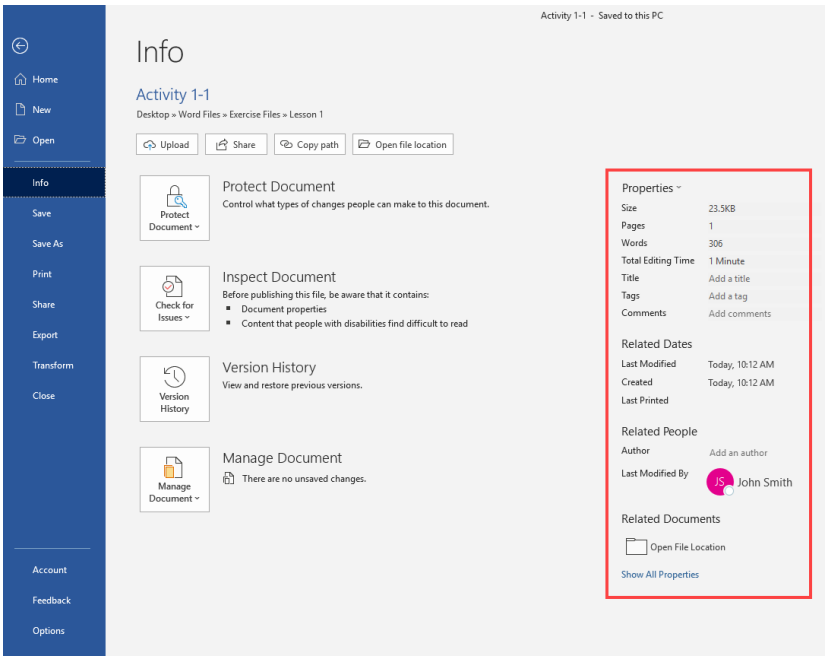
4. Enter your initials in uppercase in the next field:



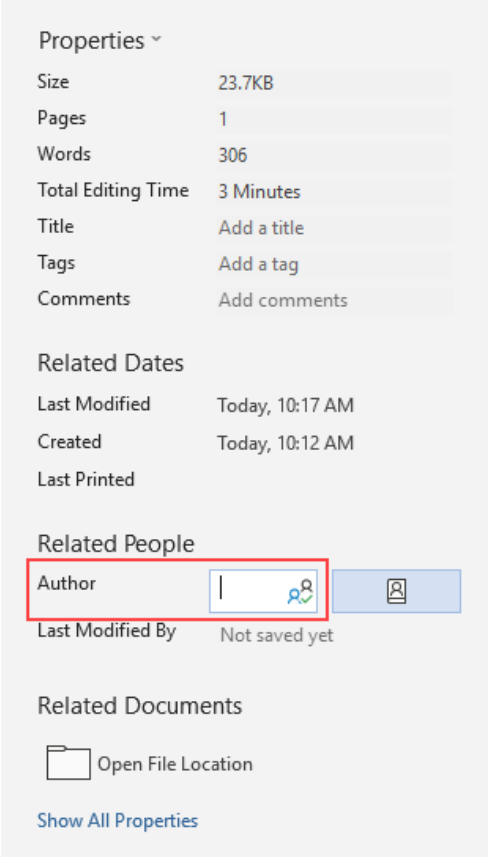
5. Click **OK** to save your changes:



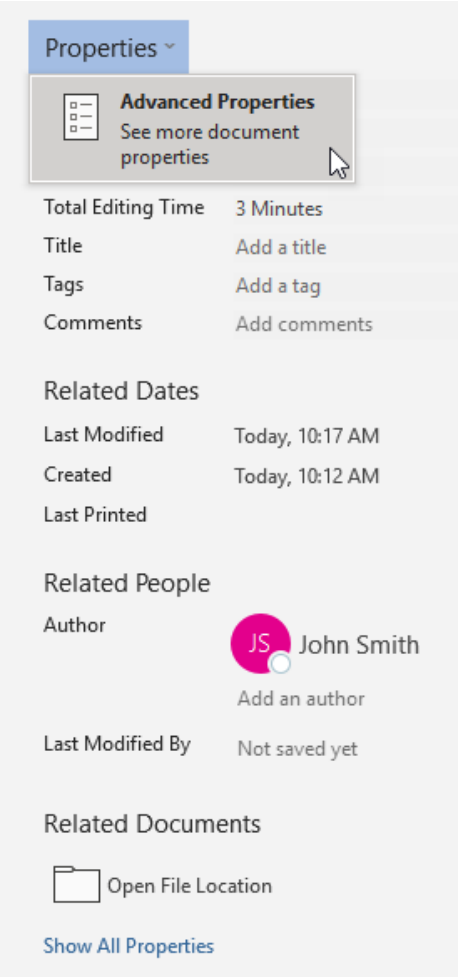
6. Now let us view the document's properties. Click **File → Info**. Review the information on the right-hand side:



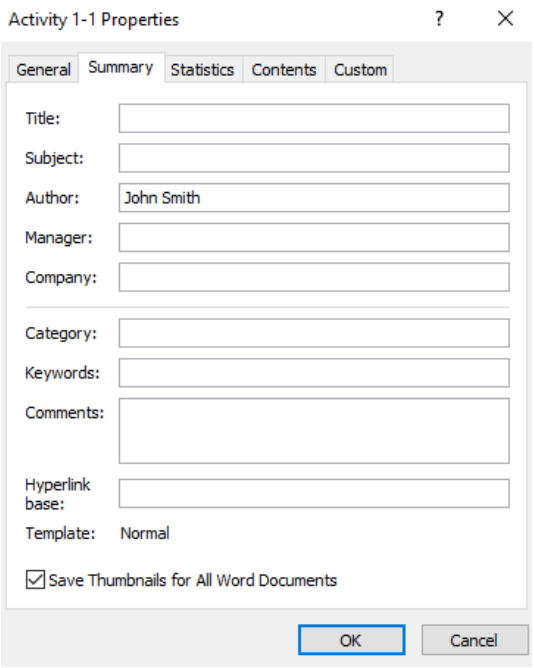
7. Click in the Author field and type your name:



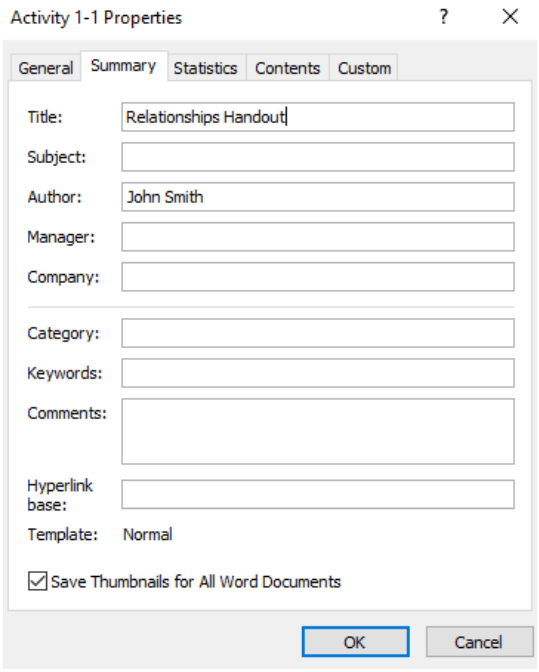
8. Next, open the Properties dialog box by clicking **Properties → Advanced Properties**:



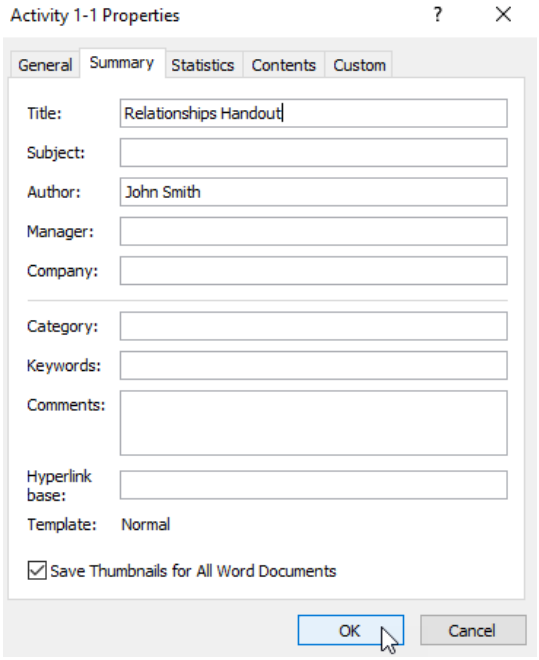
9. The Properties dialog box will open to the Summary tab. (If this tab is not displayed, click it.) You will see the author information that we modified in the Information category:



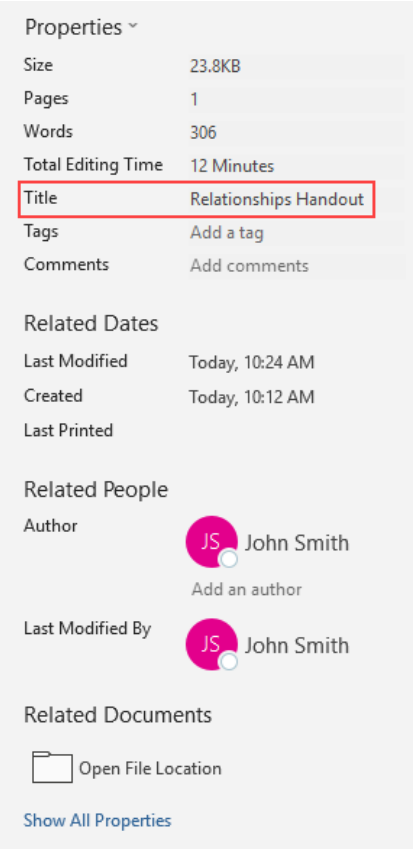
10. Click in the **Title** field and type “Relationships Handout”



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



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



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

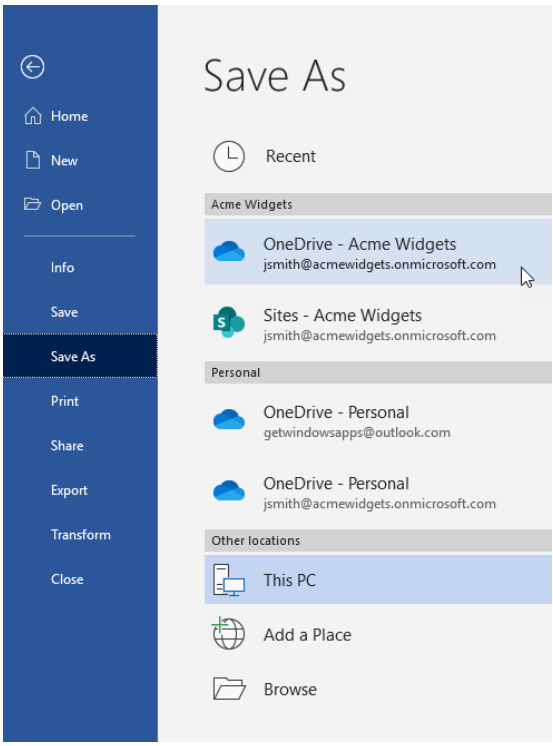
In this session, you will learn:

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

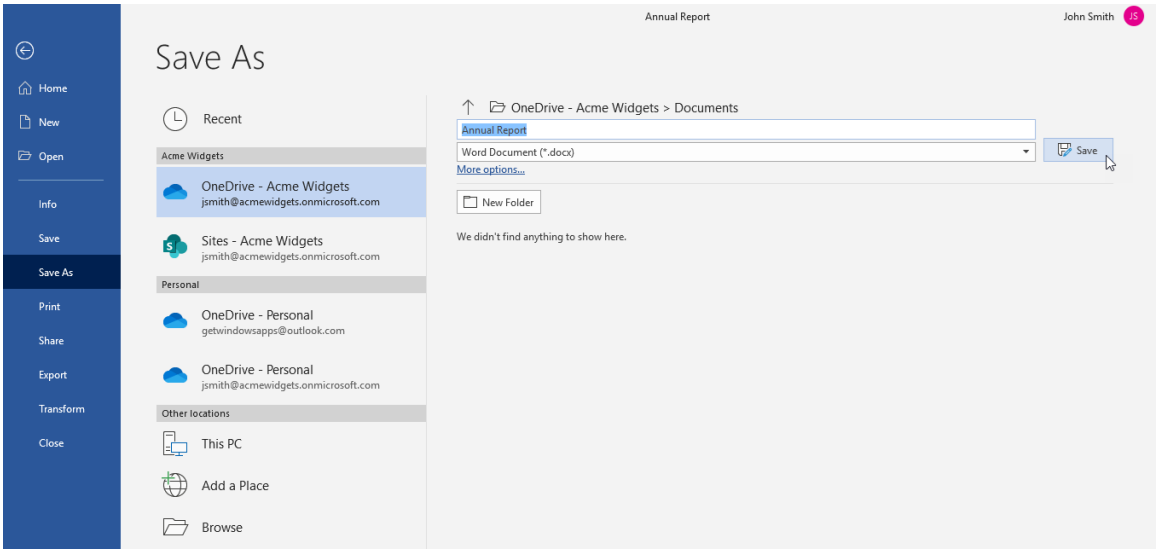
OneDrive

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 → Save As → Choose your OneDrive account**:

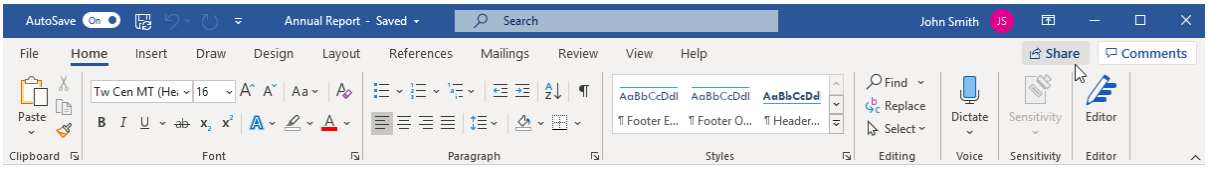


Now, select the desired location, and then click the **Save** button to upload your document to OneDrive:

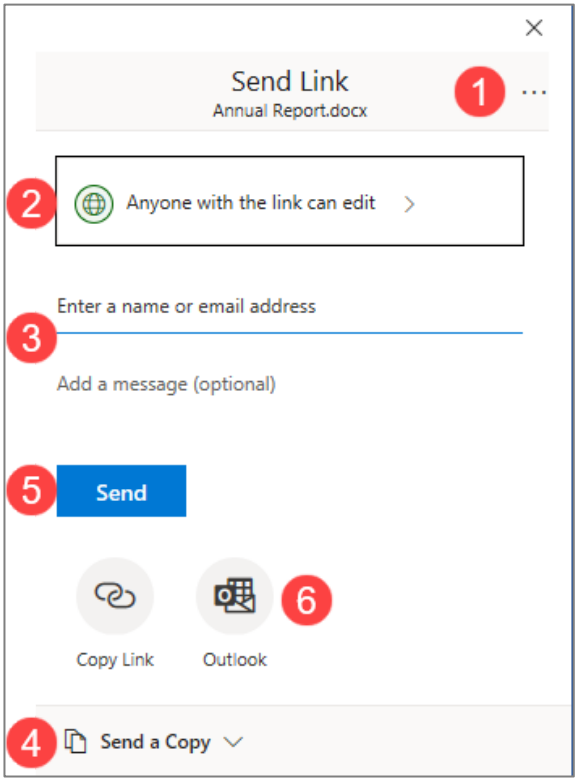


Sharing a Document

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:



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



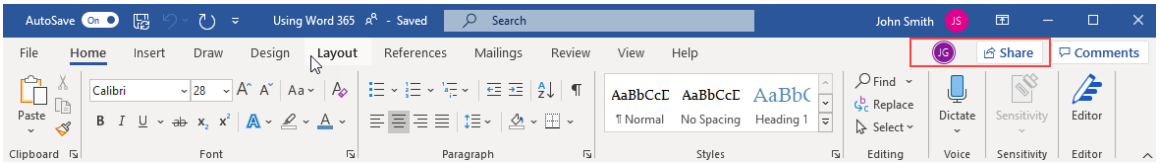
Here is an overview of the dialog box's commands.

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.
6. Alternatively, you can use these commands to copy a link to the file or use Outlook to send an email message.

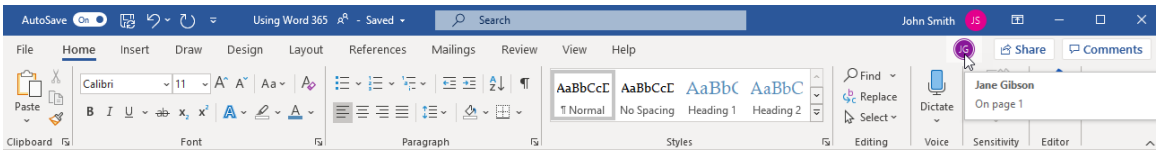
Once you click "Send," your document will be shared and you will be returned to the main Word window.

Editing a Shared File

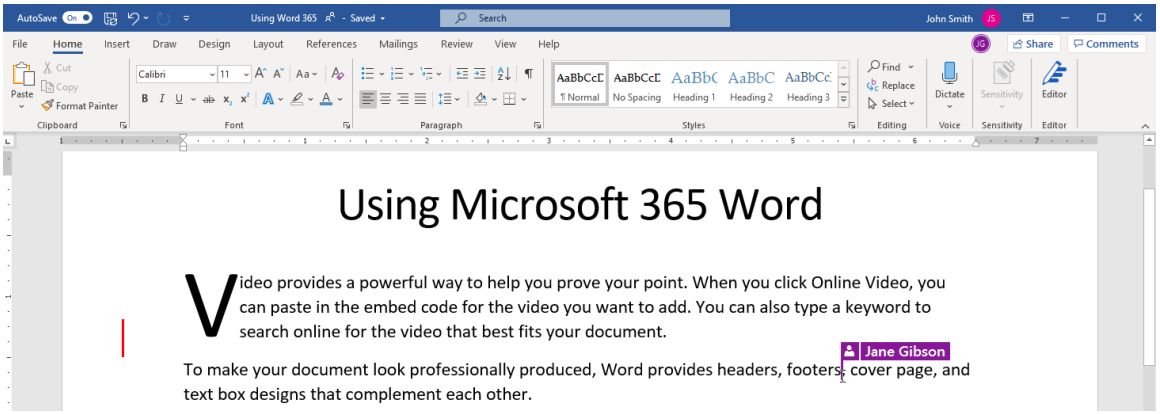
When you open a shared file, you will see a notification by the Share icon if others are editing it too:



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:



Word will keep track of who is editing what to prevent conflicts:



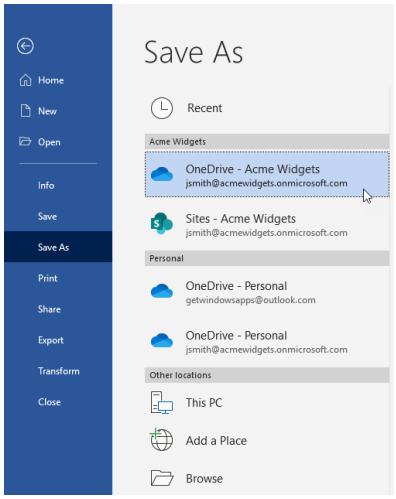
Activity 1-2: Sharing Documents

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.

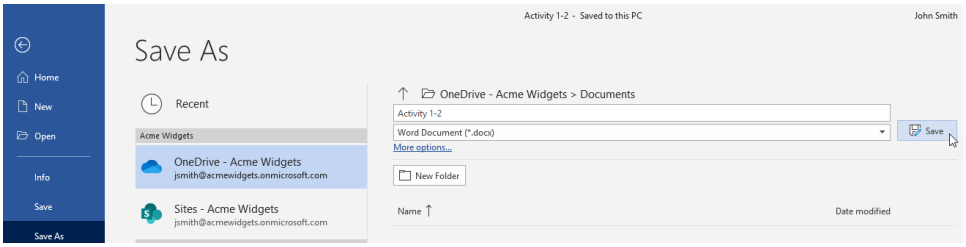
1. To begin, open Activity 1-2:

2. Click **File → Save As**:

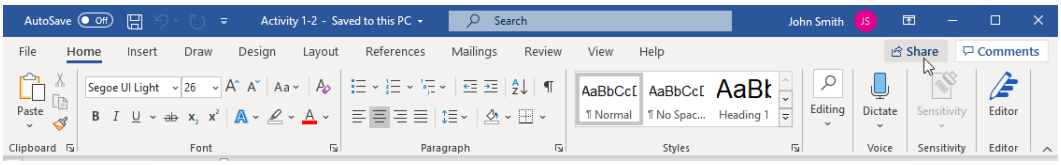
3. In the Save As category, choose your OneDrive account:



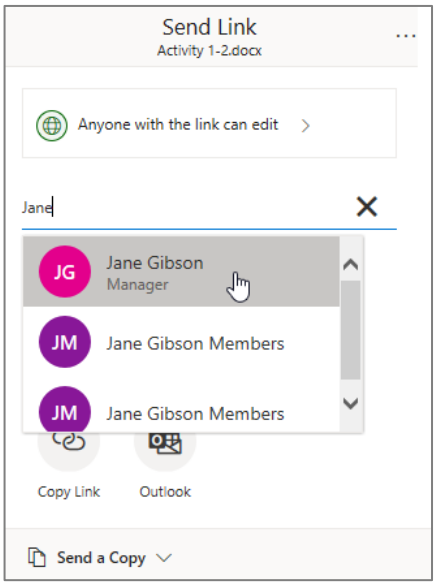
4. Select the location in your OneDrive and click **Save** to save your document



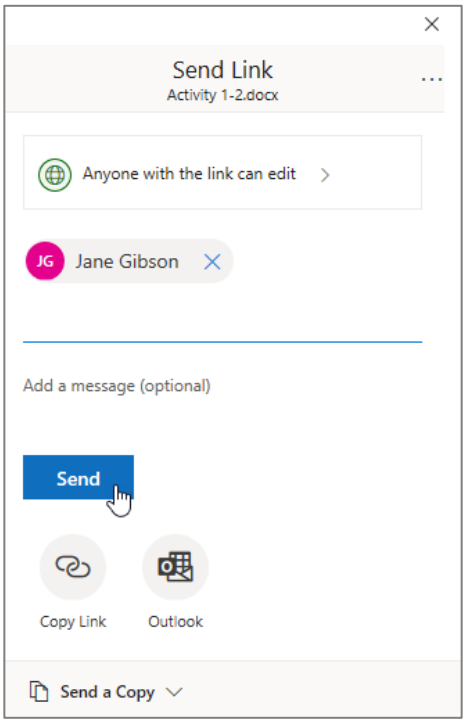
5. To create a sharable link and allow others to make changes to your document, click the **Share** button in the top right-hand side of the ribbon.



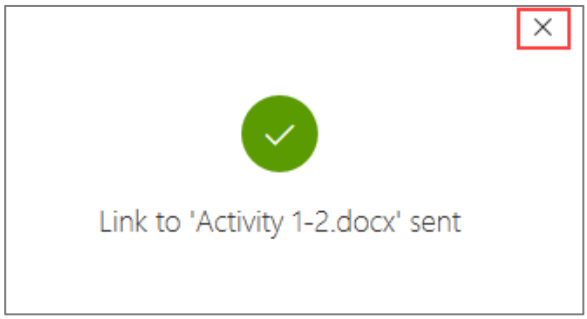
6. The Send Link dialog box will open. Enter your partner's name or email address and click **Send**:



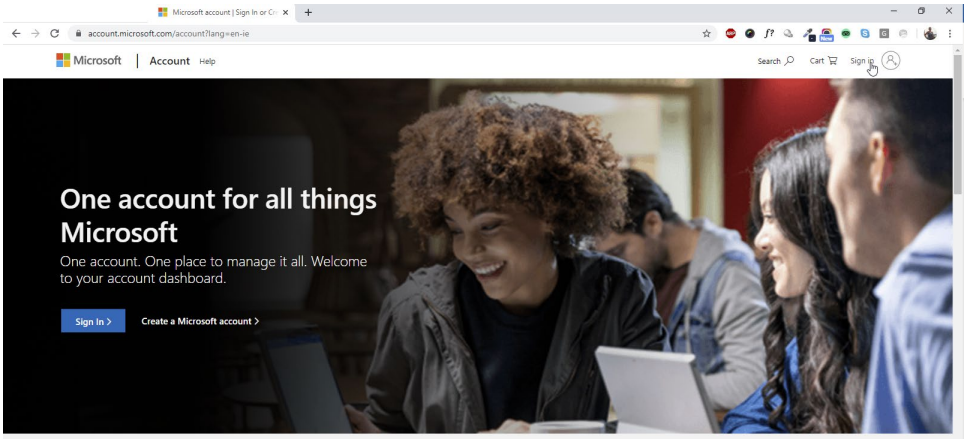
7. Click **Send**:



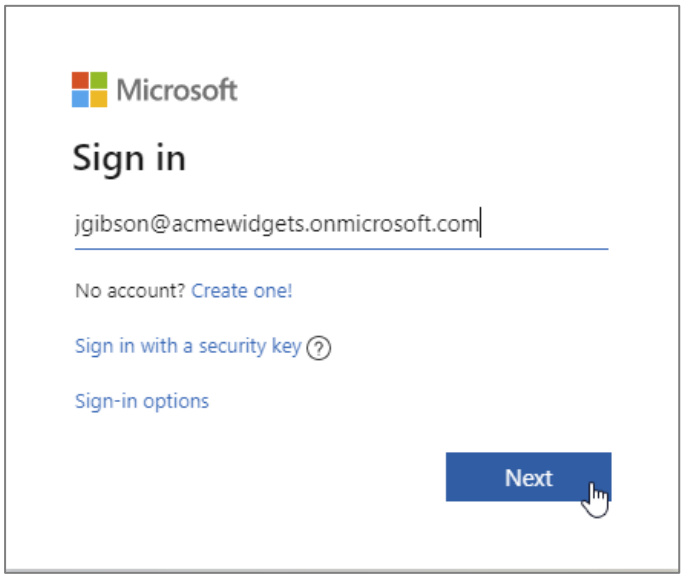
8. A dialog box will appear advising you that your link has been Sent. From here you can simply close the box and paste your link into the place where you wish to copy and/or share it. Close the dialog box by clicking the **X** in the upper right-hand corner:



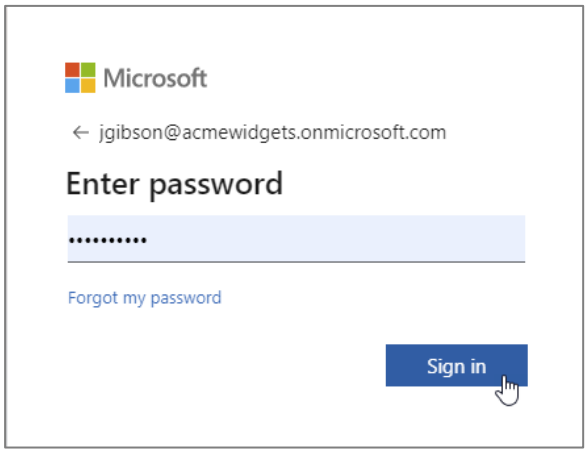
9. Partner B, open your web browser and log in to your Microsoft account:



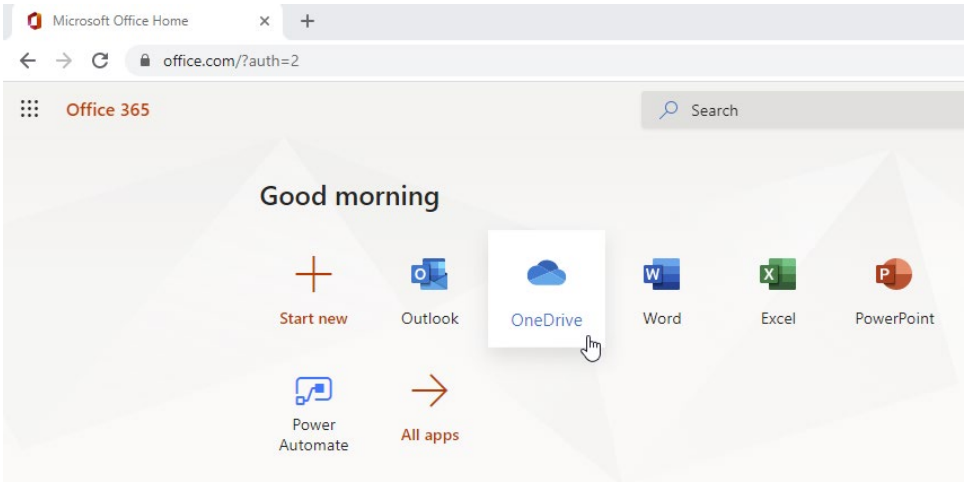
10. Enter your account name and click **Next**:



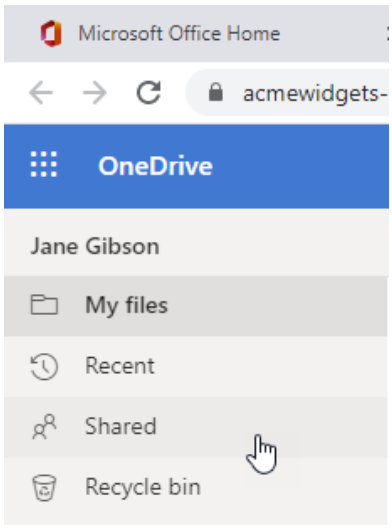
11. Enter your password and click **Sign in**:



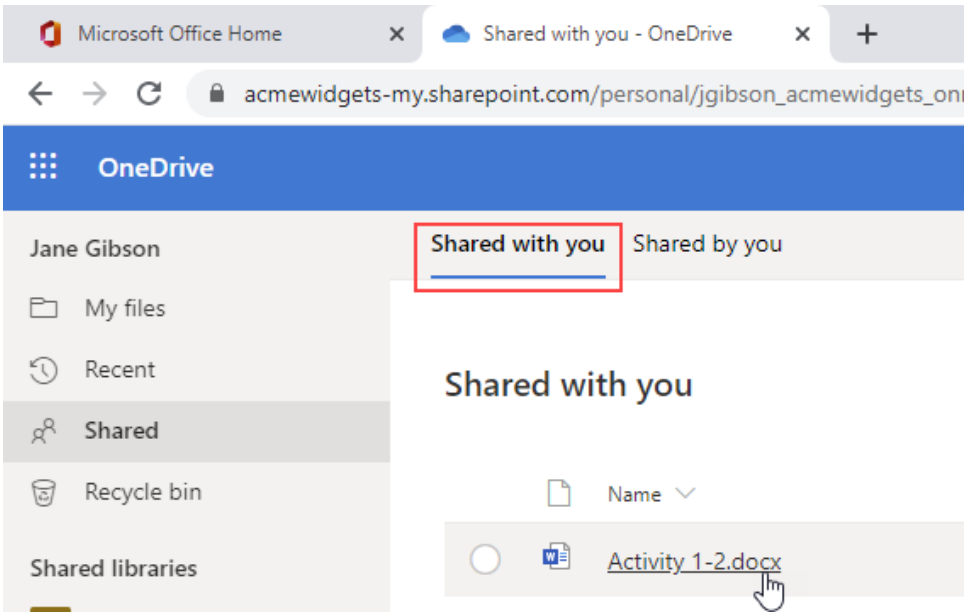
12. To open, click **OneDrive**:



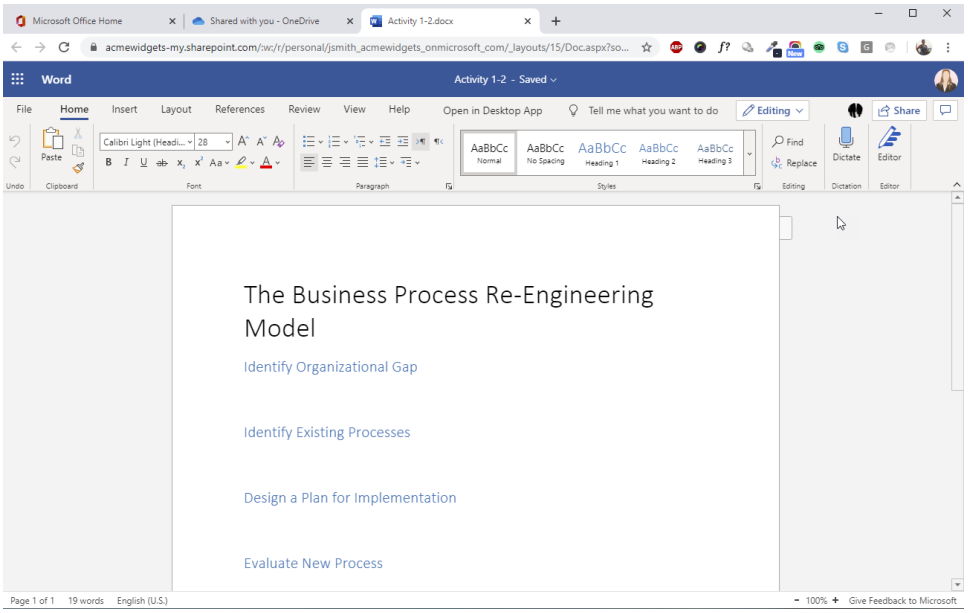
13. Click **Shared**:



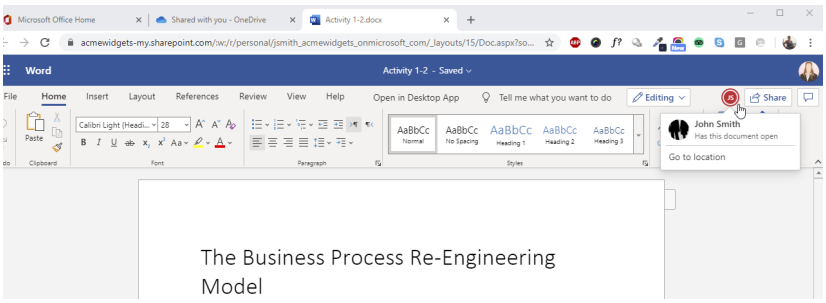
14. A list of shared documents will be displayed in the **Shared with you** folder. Click Activity 1-2 to open it:



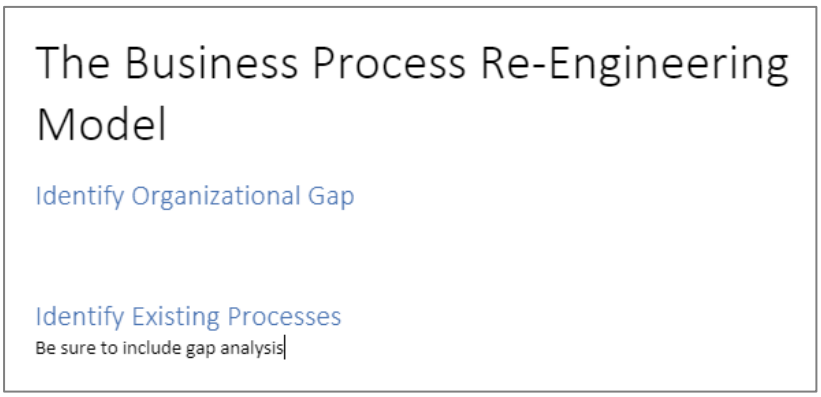
15. The document will open in Word Online in a new browser tab where you can begin editing:



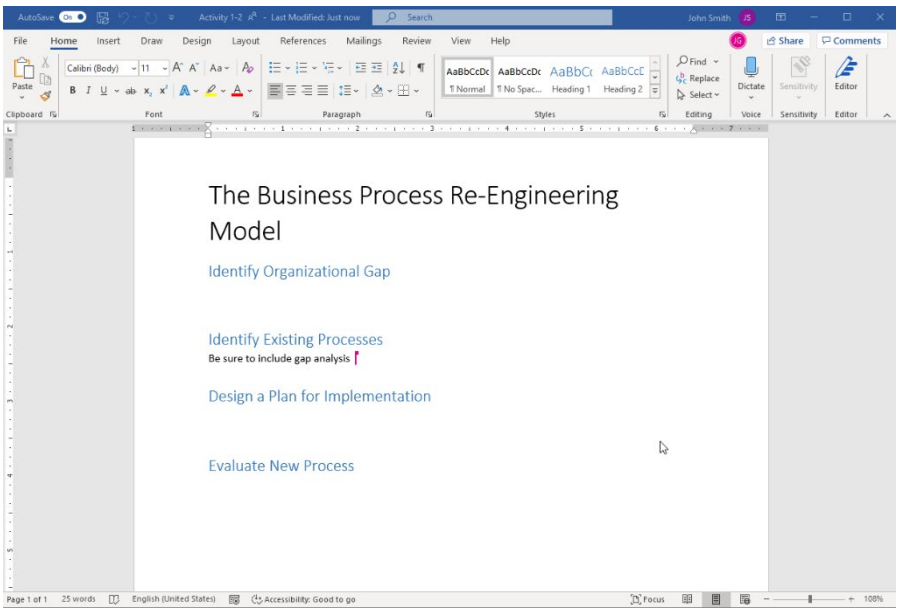
16. You should see a notification that your partner is also editing this document.



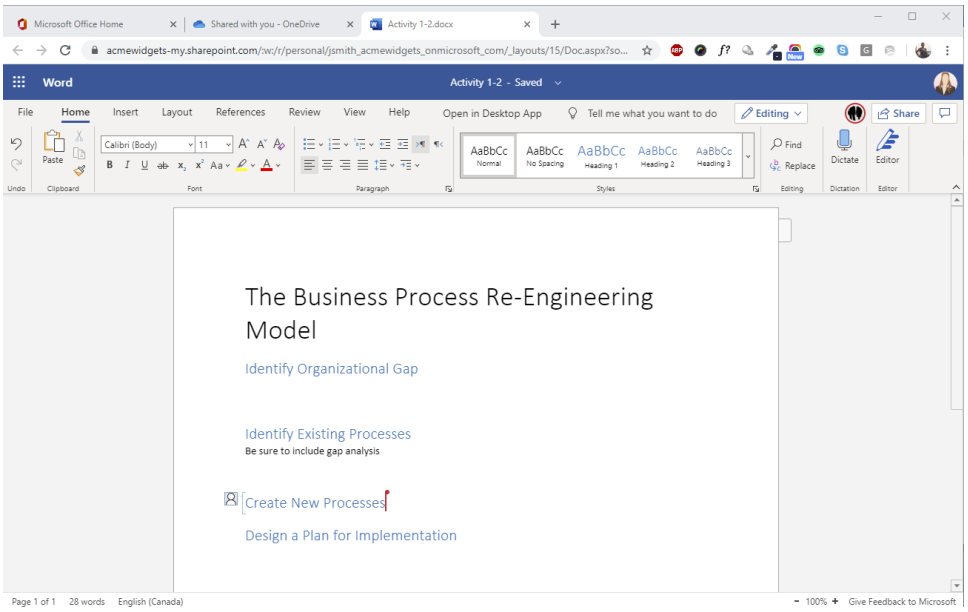
17. Add the text “Be sure to include gap analysis” under the second heading:



18. 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.

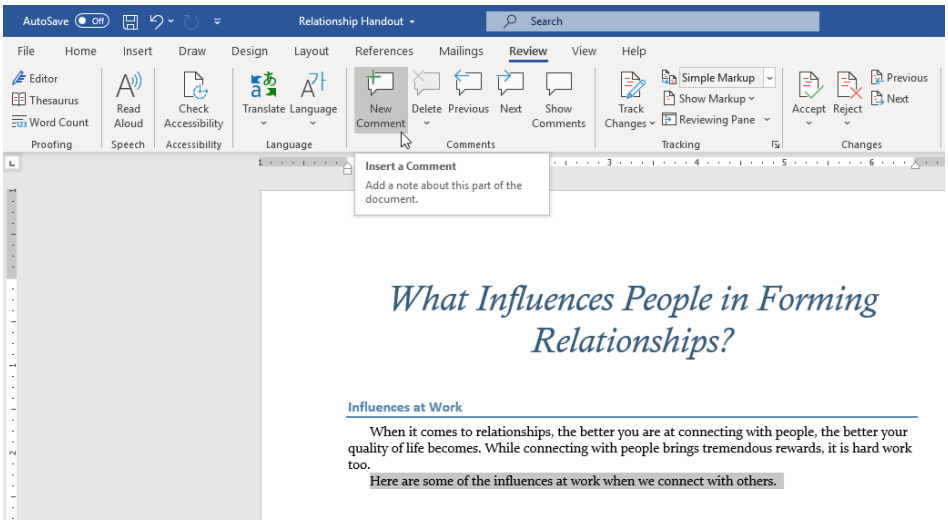
Topic Objectives

In this session, you will learn:

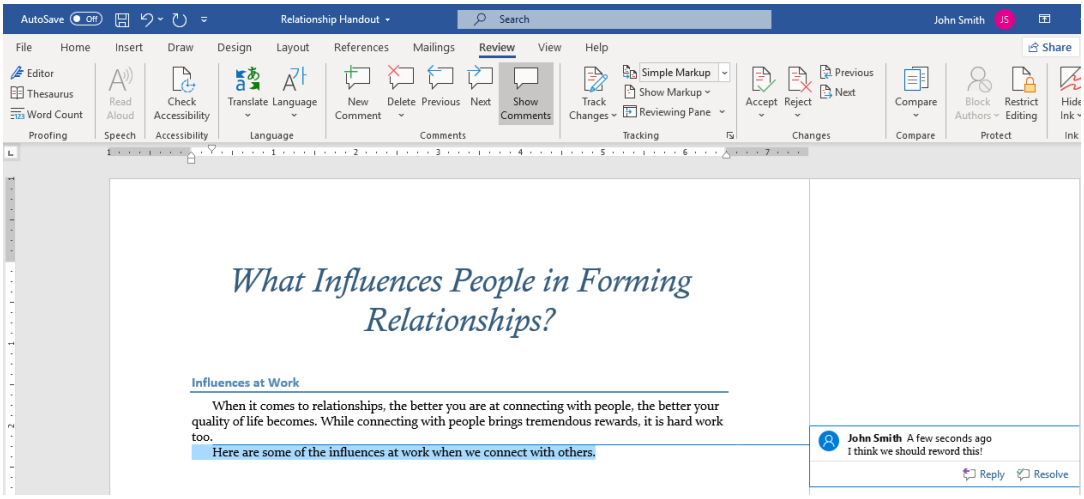
- How to insert and edit comments
- How to reply to a comment
- How to mark a comment as done
- Techniques for navigating through comments
- How to delete comments

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 → New Comment**:



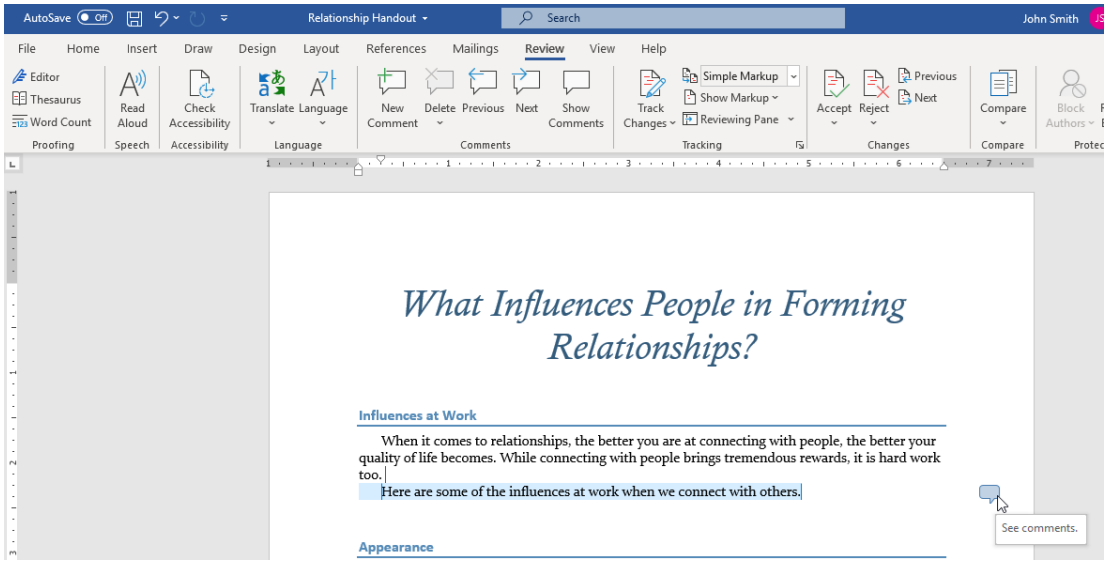
You will then see a balloon appear on the right-hand side of the screen. Simply type your comment into this balloon:



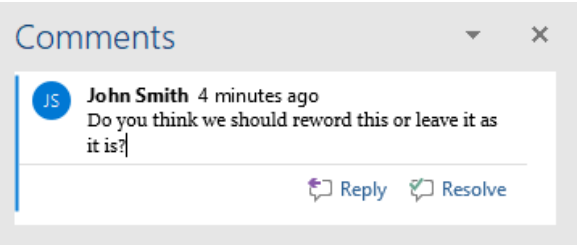
Once you are done typing your comment, click outside the comment to continue editing the document.

Editing Comments

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

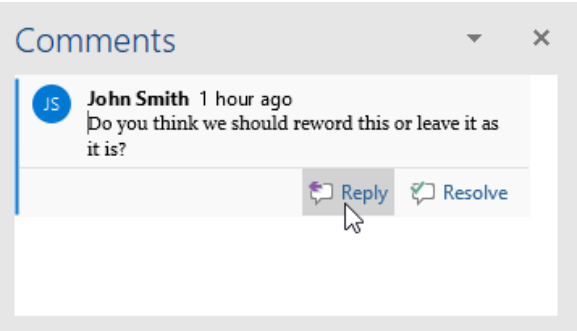


Then, click and type to make your changes. Click outside of the comment to return to the document:



Replying to Comments

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

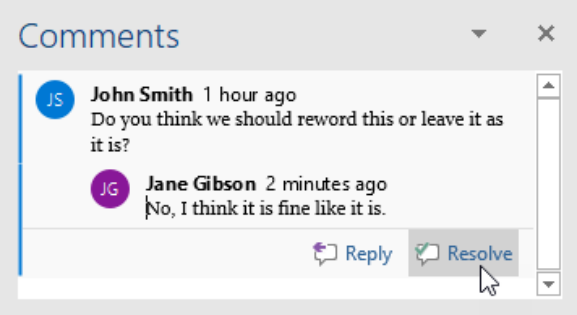


Then type your reply:

Click outside of the comment to close it.

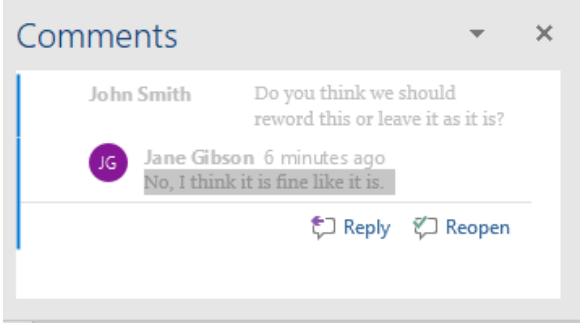
Resolving Comments

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



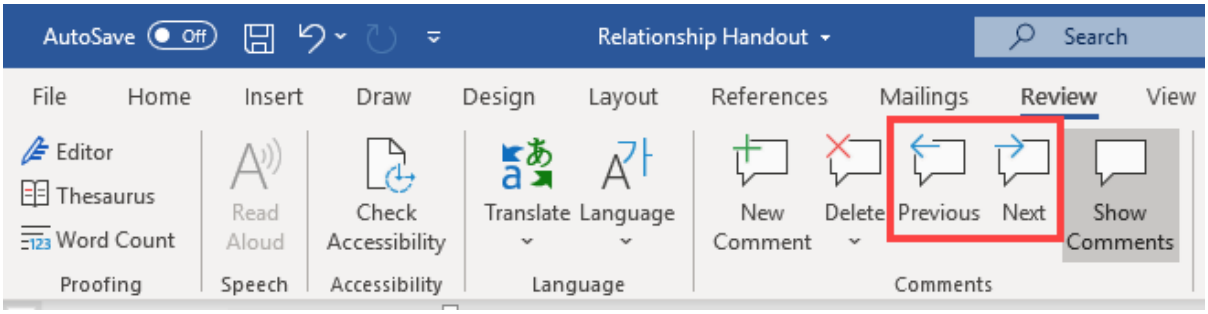
Now, the comment will be grayed out:

+



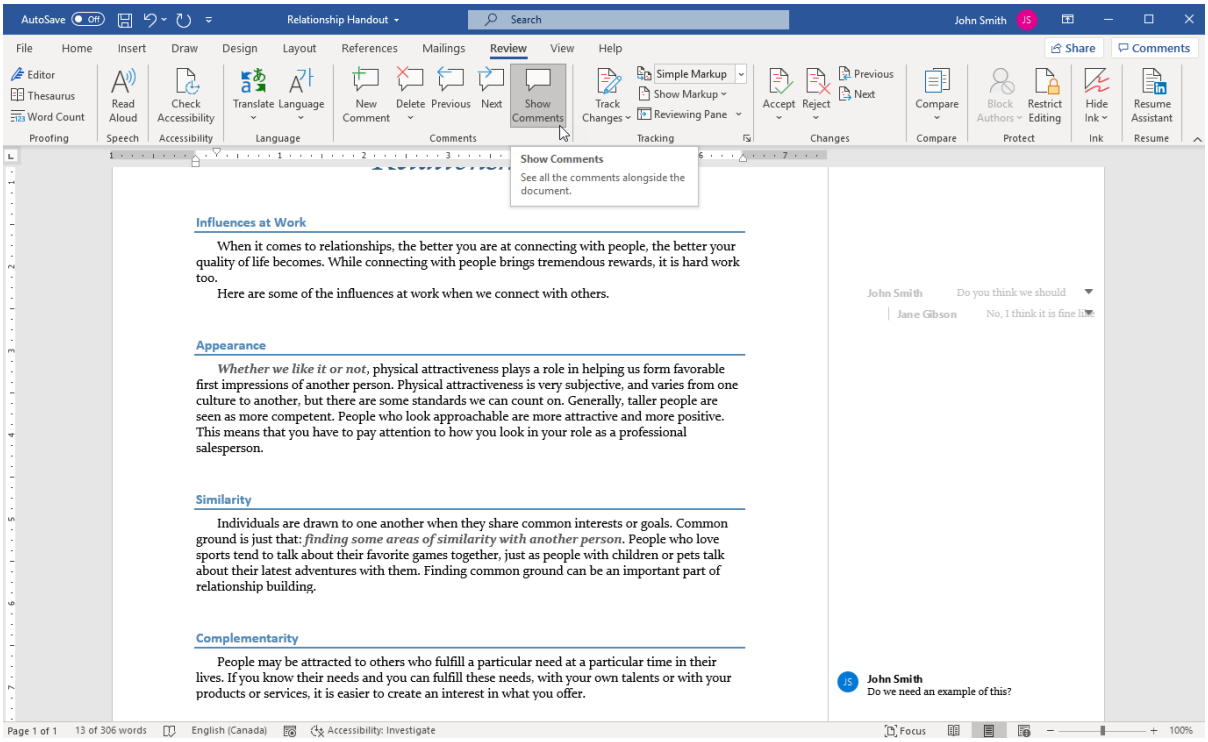
Navigating Through Comments

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:



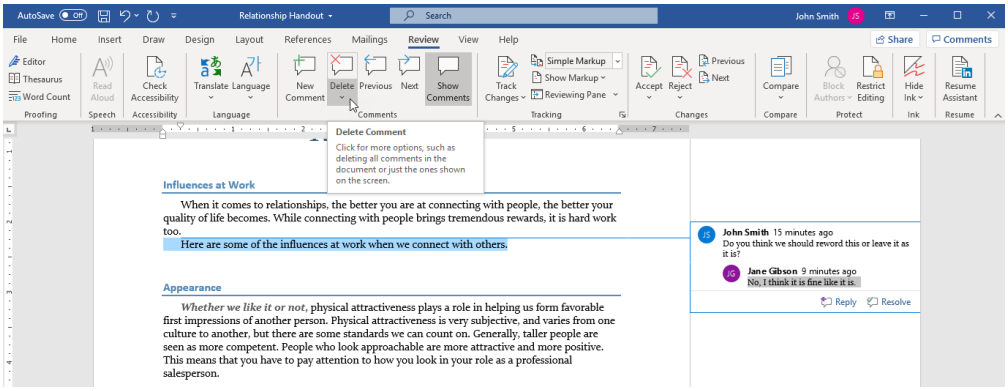
If you have reached the end of all the comments in the document, clicking **Next** will return you to the first comment in the document. Similarly, if you are currently reading the first comment and you click Previous, Word will show you the last comment.

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:

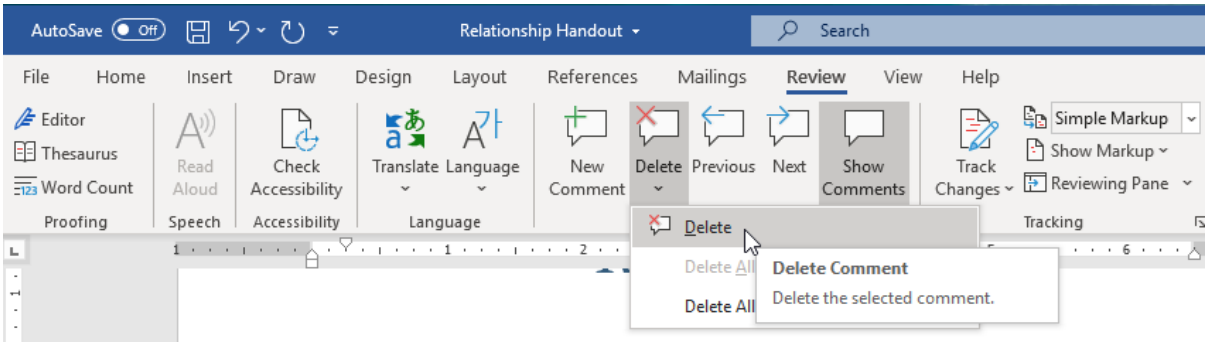


Deleting Comments

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:



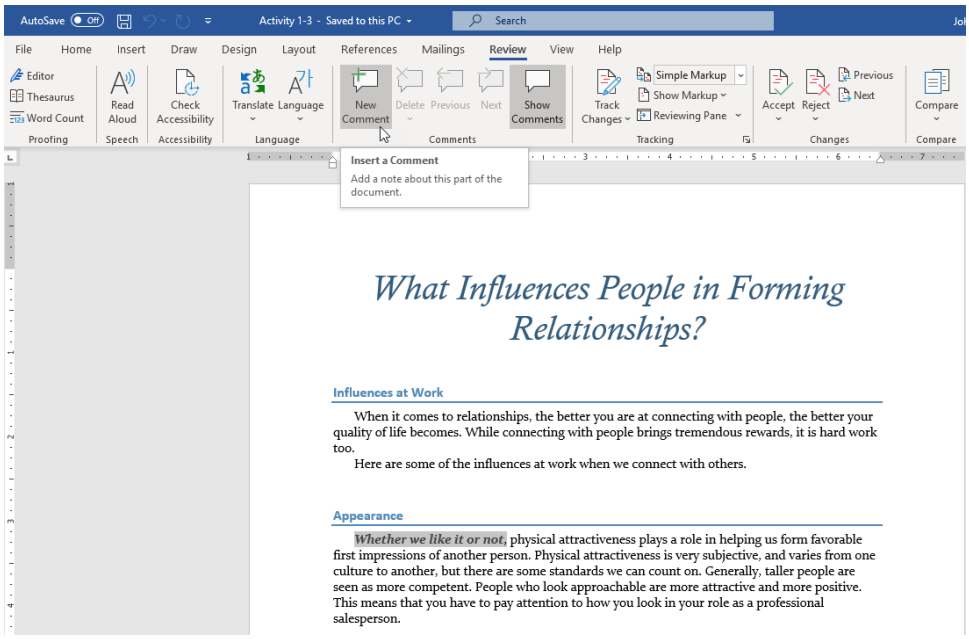
With this menu, you have the option to delete all comments currently shown, as well as all comments in the current document.

Activity 1-3: Working with Comments

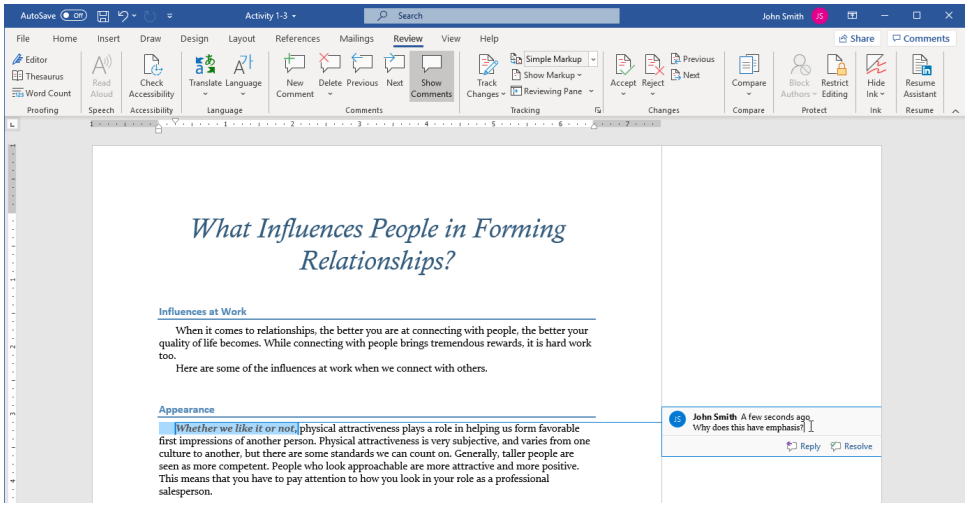
In this activity, you will add comments to a document.

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

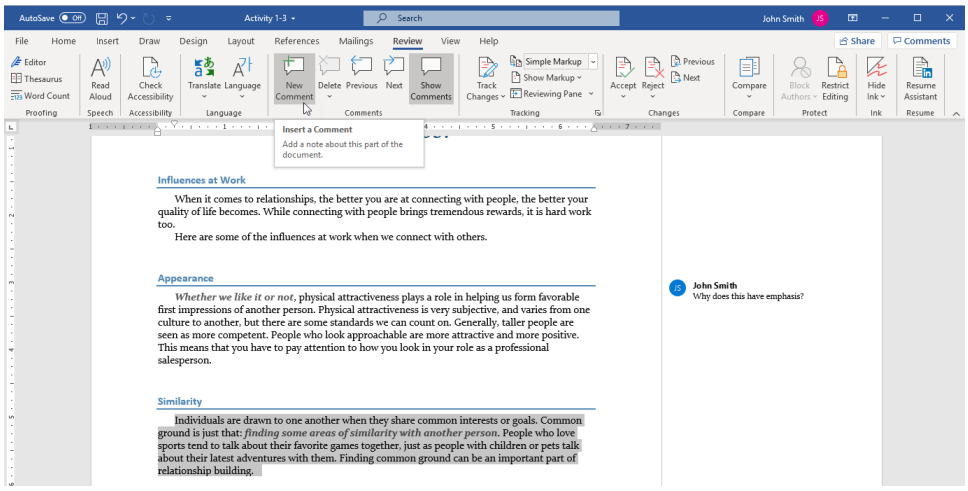
2. Select the words “Whether we like it or not” under the Appearance heading. Click **Review → New Comment**:



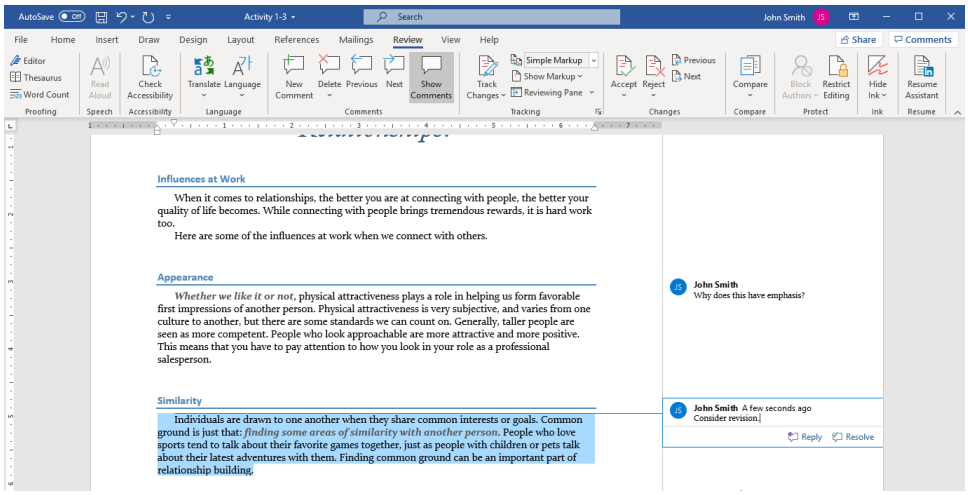
3. Type “Why does this have emphasis?” into the comment bubble that appears:



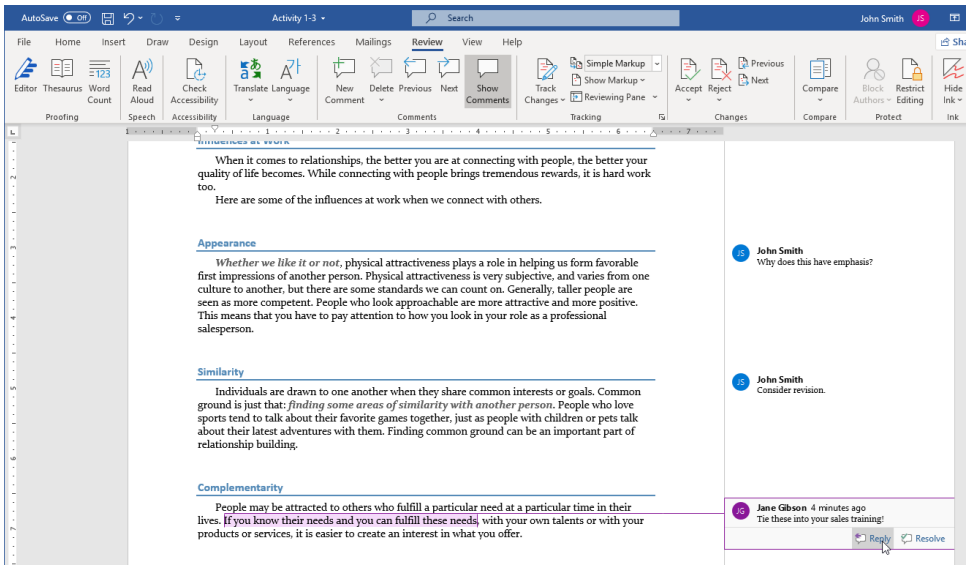
4. Select the paragraph under the Similarity heading. Click **Review → New Comment**:



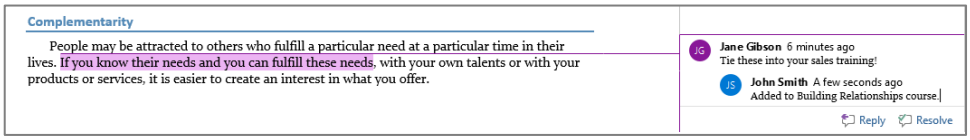
5. Type "Consider revision."



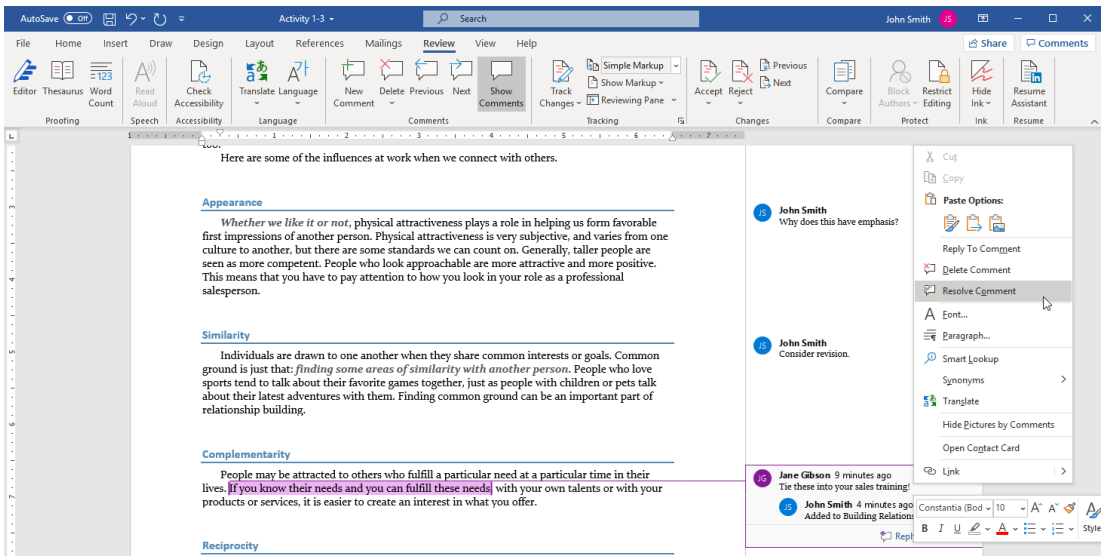
6. Scroll down in the document. You will see a comment by another user. Move your mouse over it and click the **Reply** icon:



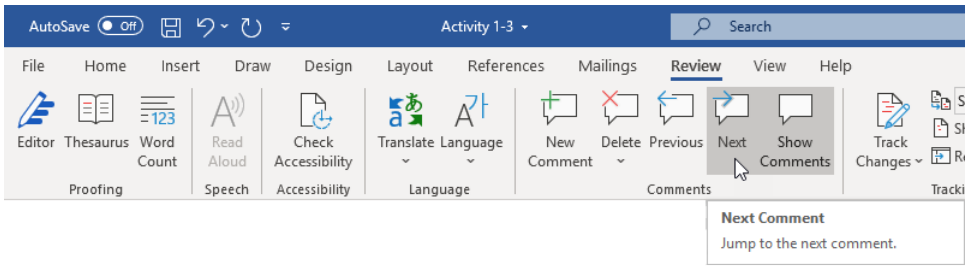
7. Type, “Added to Building Relationships course.”



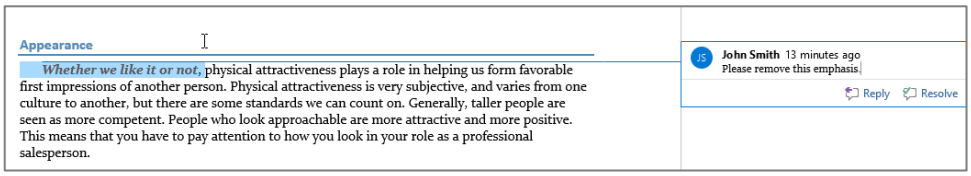
8. Right-click the original comment. Click **Resolve Comment** on the original comment. The comment will then be grayed out:



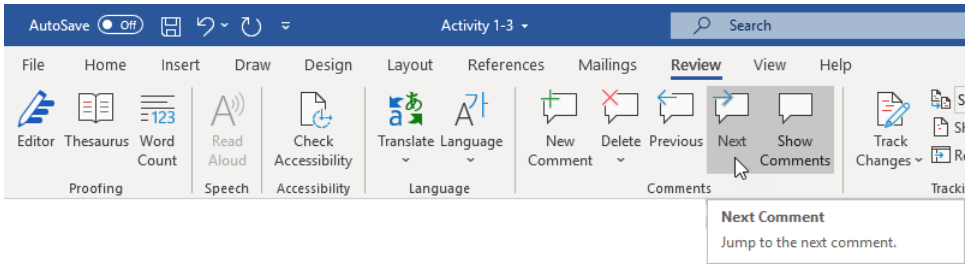
9. Now that you have commented in the document, let's review your comments. Click the **Next** button in the Comments group of the Review tab twice:



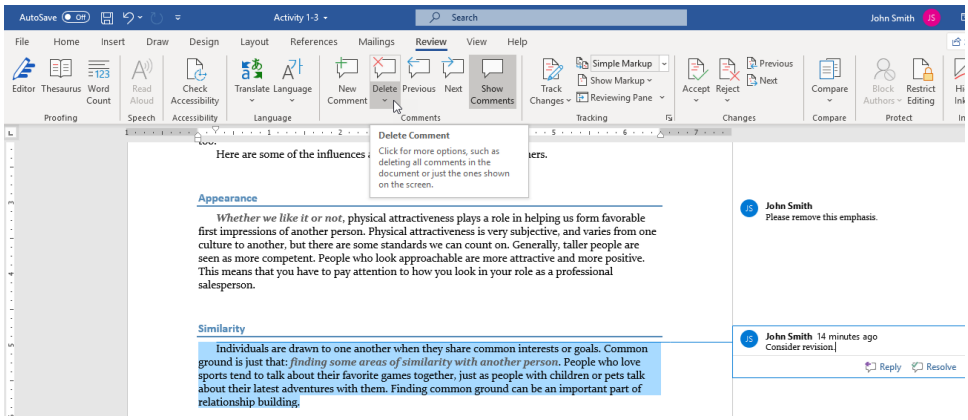
10. You will be returned to your comment about the emphasis, which should probably be removed entirely. Click inside the comment and change the text to "Please remove this emphasis."



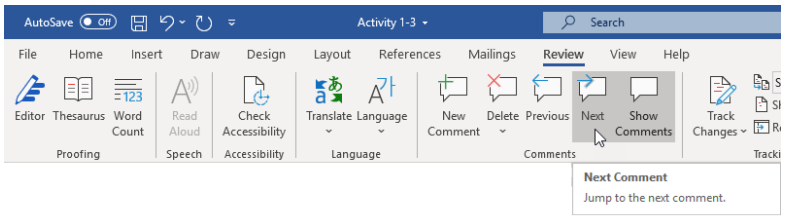
11. Click **Review → Next** (in the Comments group) to advance to the second comment:



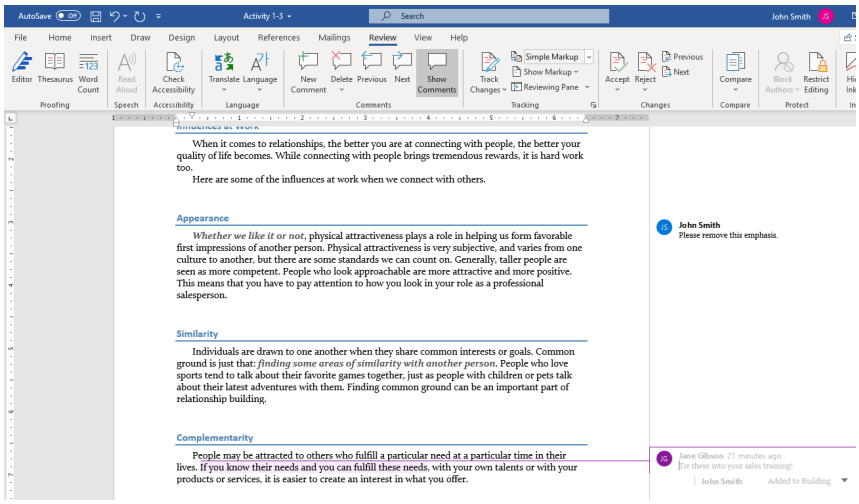
12. On second thought, this paragraph sounds OK. Click the **Delete** command on the Review tab to delete this comment:



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

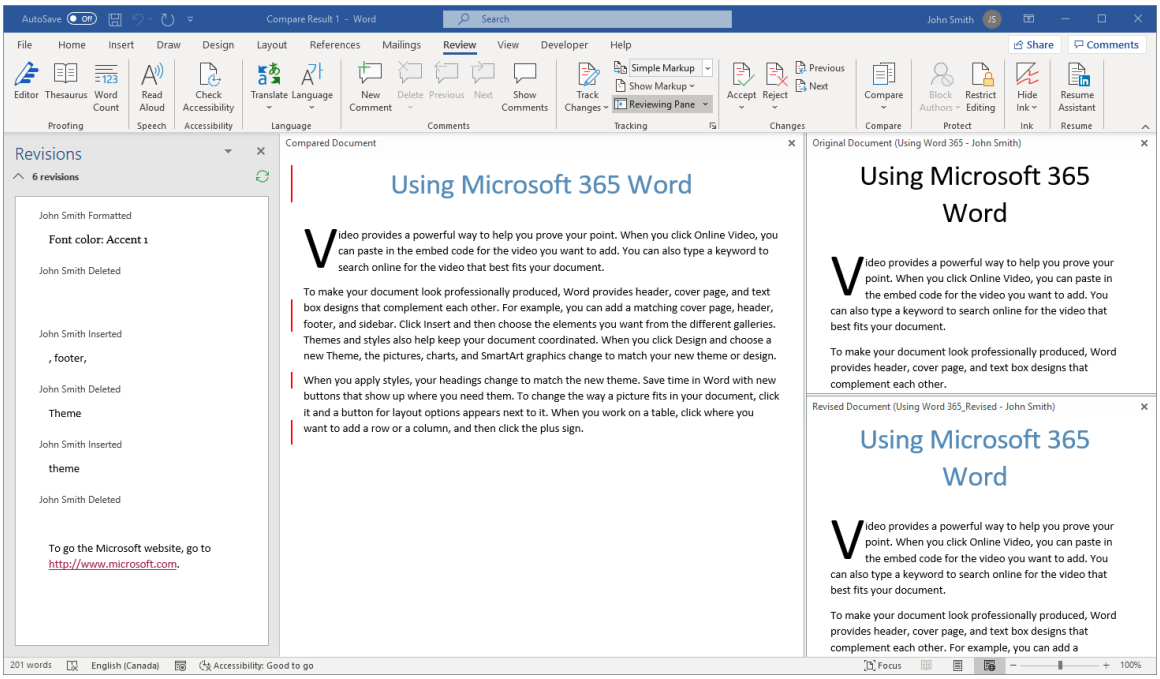
In this session, you will learn:

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

- How to accept and reject changes in a compared document

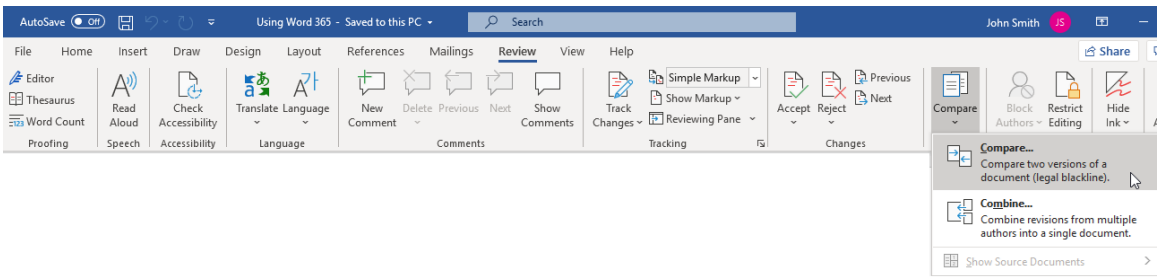
Legal Blackline

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:

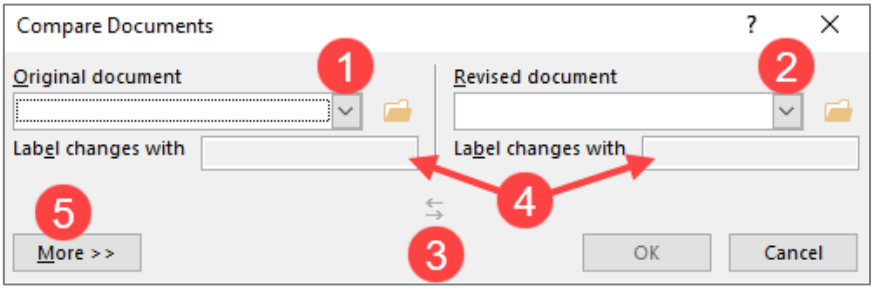


Comparison Settings

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

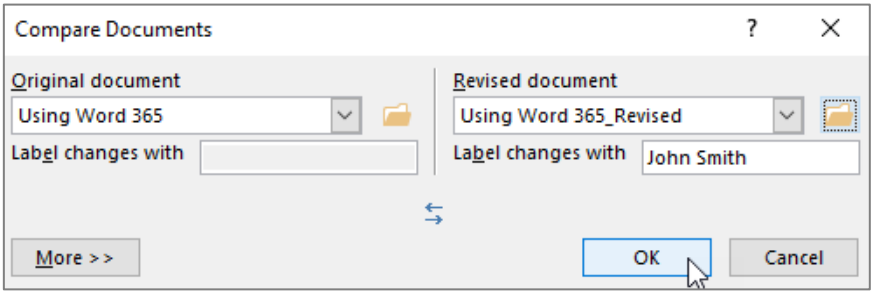


The Compare Documents dialog box will open:

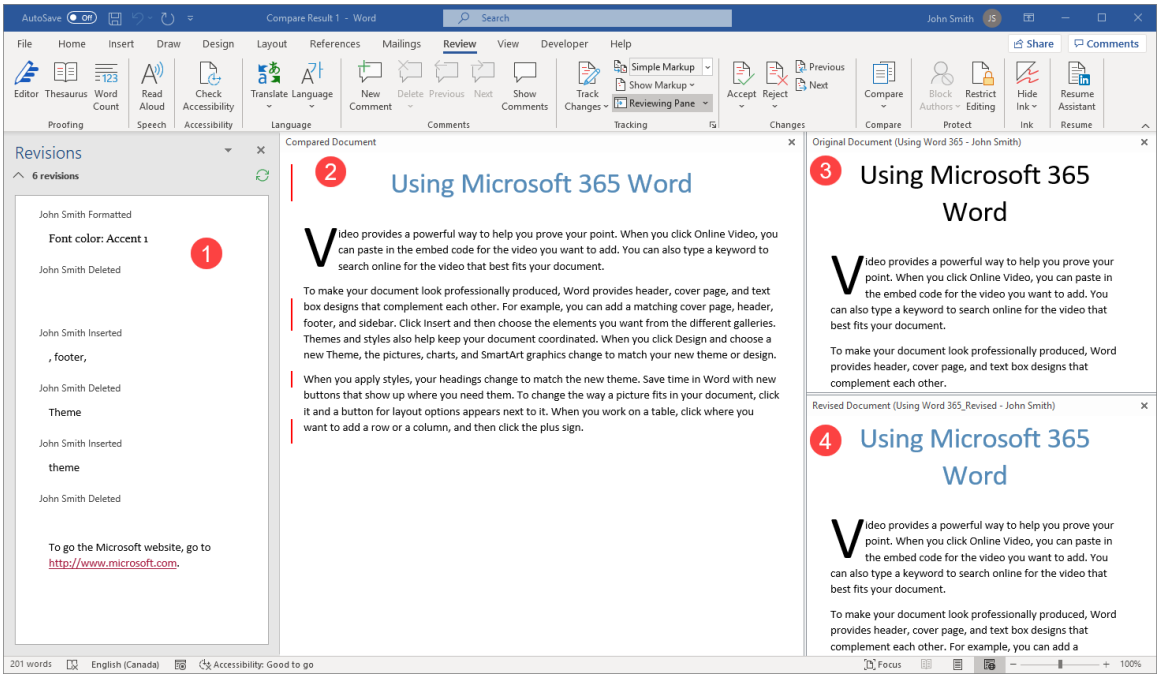


The most important part of this dialog box is choosing the **original document (1)** and the **revised document (2)**. (You can do this via the drop-down menus or the Browse button. You can also reverse the labels for the documents by clicking the **Swap button**, marked with a **(3)** in the image above.) 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:



With the default settings, the comparison will look like this:

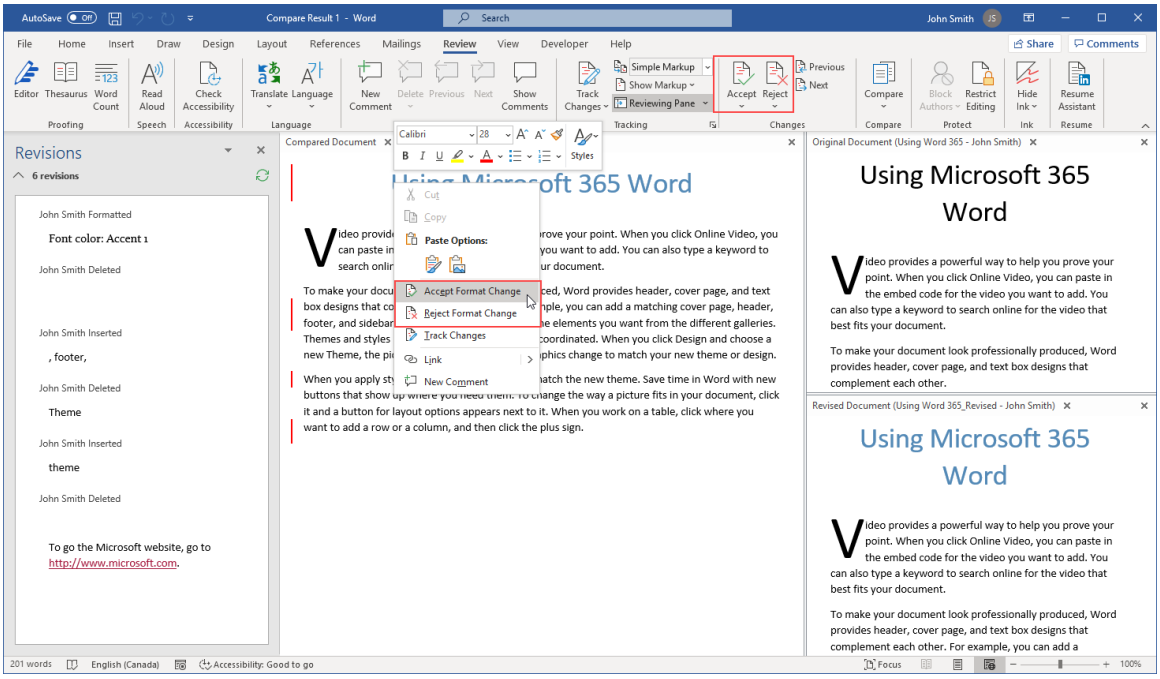


On the left-hand side is the **Revisions Pane (1)**, which details every change that was made. The **compared document** (a new document that shows the original document with changes made) is in the center **(2)**. On the right-hand side, you can see the **original document (3)** and the **revised document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

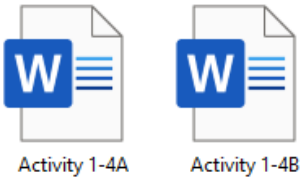
Accept	Accepts the current change and moves to the next change. The drop-down arrow offers options to accept this change, accept the change and move to the next change, accept all changes currently shown, and accept all changes in the document.
Reject	Rejects the current change and moves to the next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

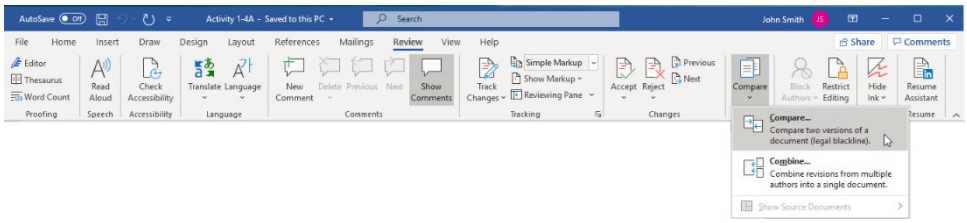
Activity 1-4: Comparing Document Changes

In this activity, you will compare two documents.

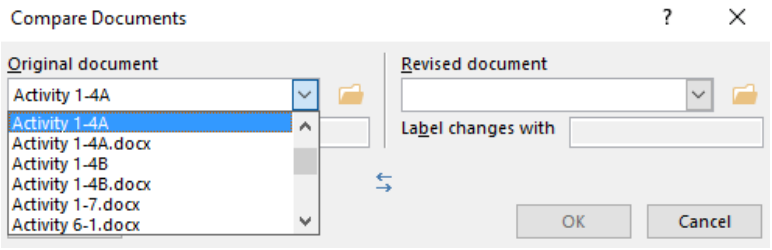
1. To begin, open Activity 1-4A and Activity 1-4B in Microsoft 365 Word. Maximize both documents:



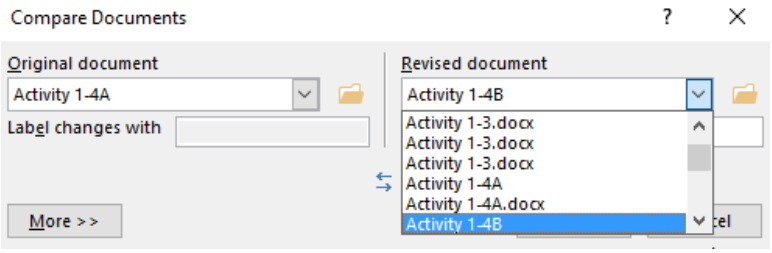
2. In either document, click **Review → Compare → Compare**:



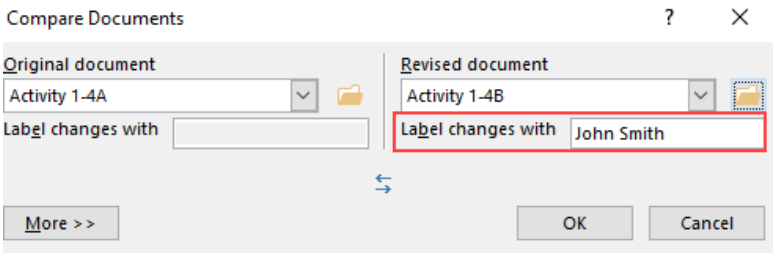
3. The Compare Documents dialog box will open. Choose Activity 1-4A as the original document.



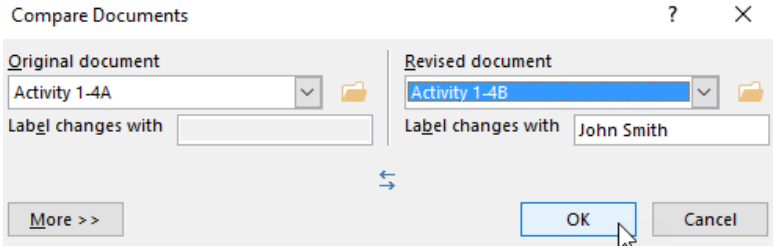
4. Choose Activity 1-4B as the revised document:



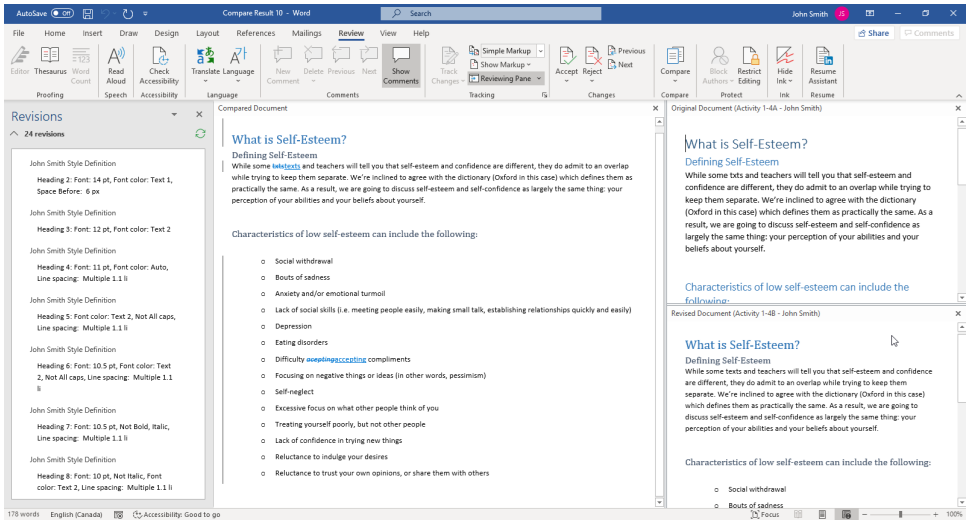
5. Type “John Smith” into the “Label changes with” text box under the “Revised document” heading:



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

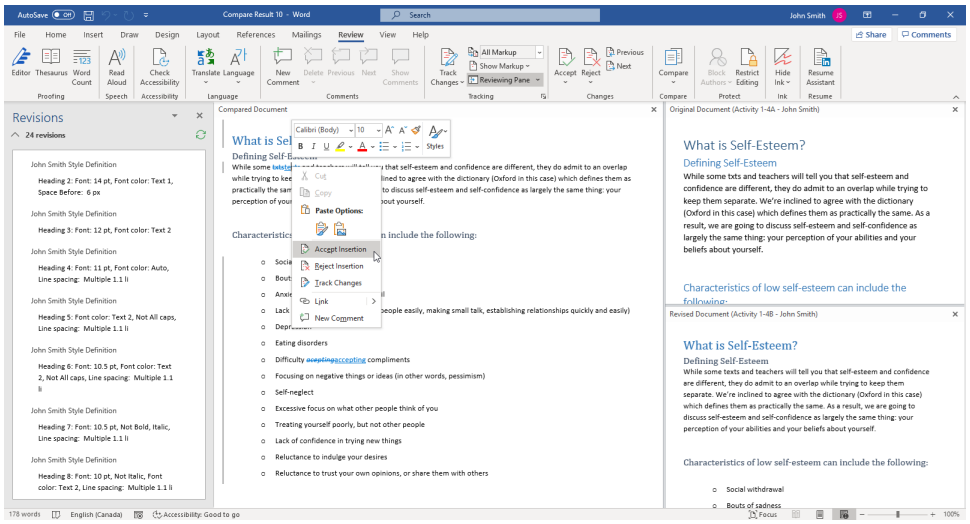


7. The Compare Result will now be displayed:



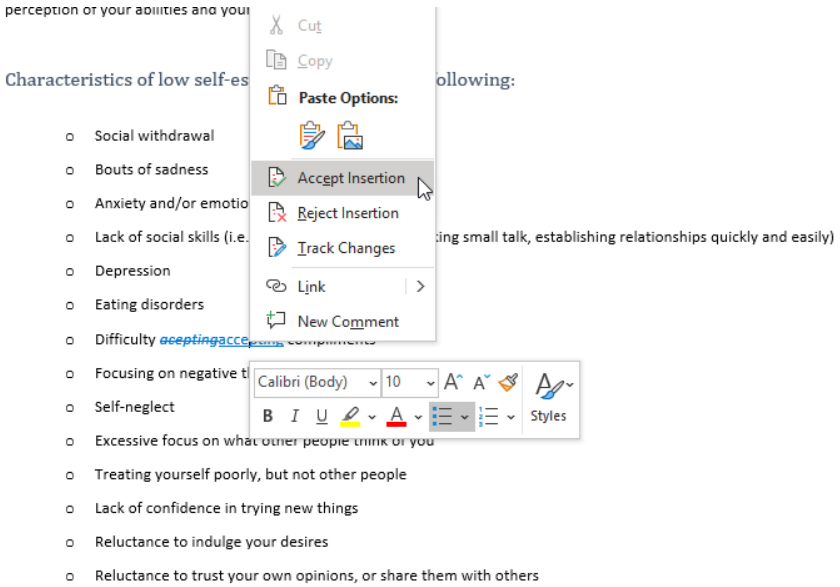
(If you see only one document, click **Review → Compare → Show Source Documents → Show Both**.)

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**:

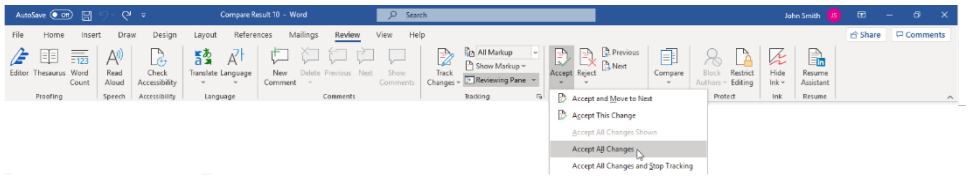


This will accept both the deletion of the typo and the insertion of the correct word. The preview results will be displayed in the center document pane.

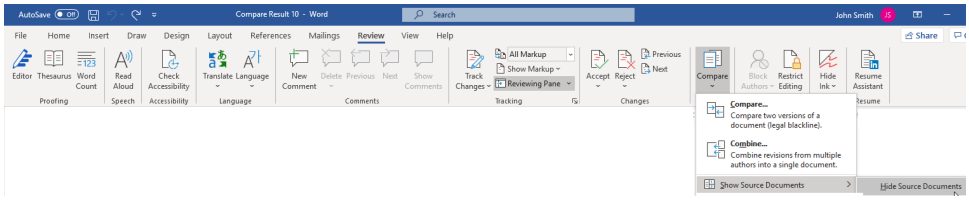
9. Repeat step 8 for the second fix (“accepting”):



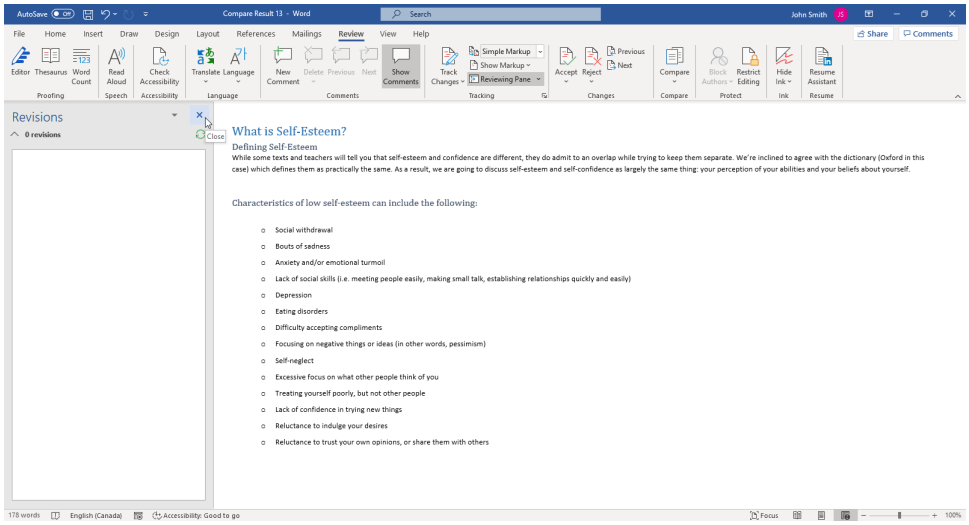
10. The rest of the changes are formatting-based. Click **Review → Accept → Accept All Changes**:



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



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



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

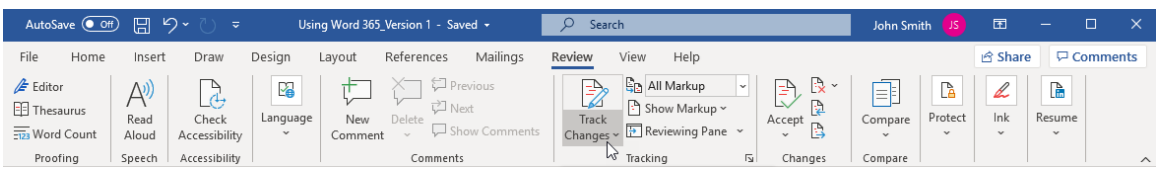
Track Changes

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**

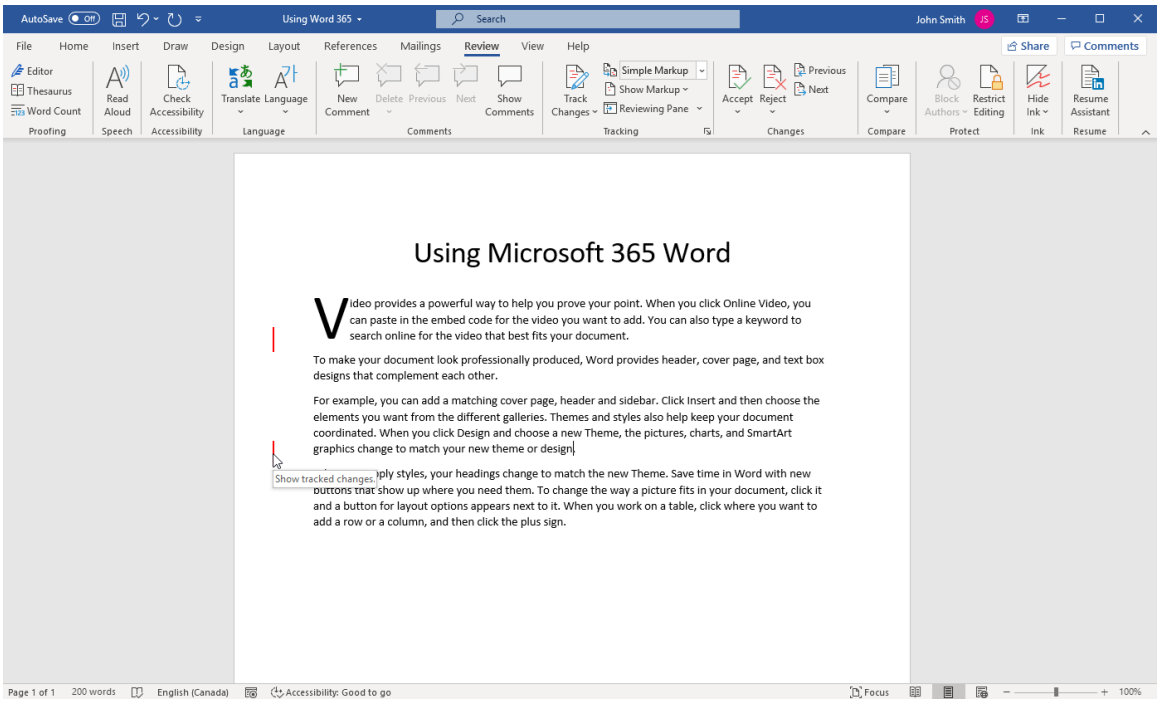


After you have enabled Track Changes, you can work with the document normally by editing and formatting text, adding graphics, and using all of Word's other features. However, your changes will be recorded in the document. These changes are called **markup**, as they literally mark up your document as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

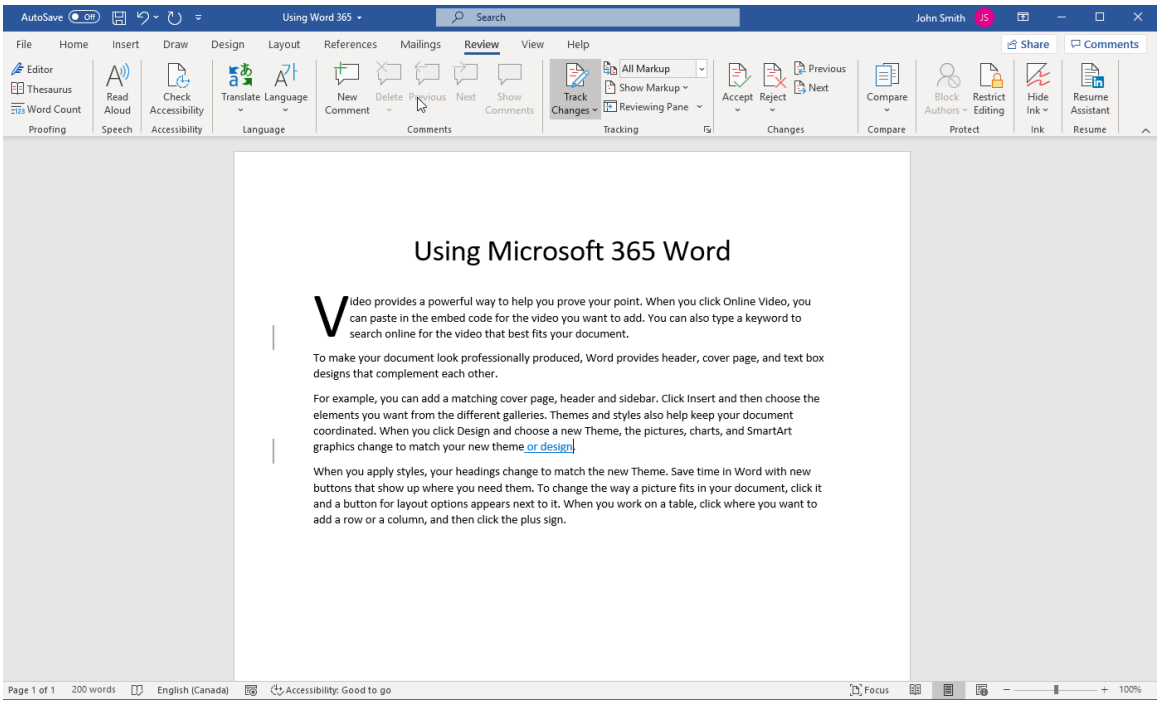
To turn the feature off, click the Track Changes button again.

Markup Views

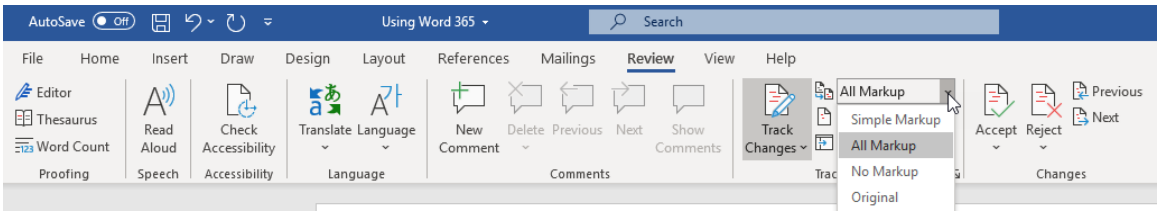
To view the markup in a document, click the red line that appears in the margin:



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:

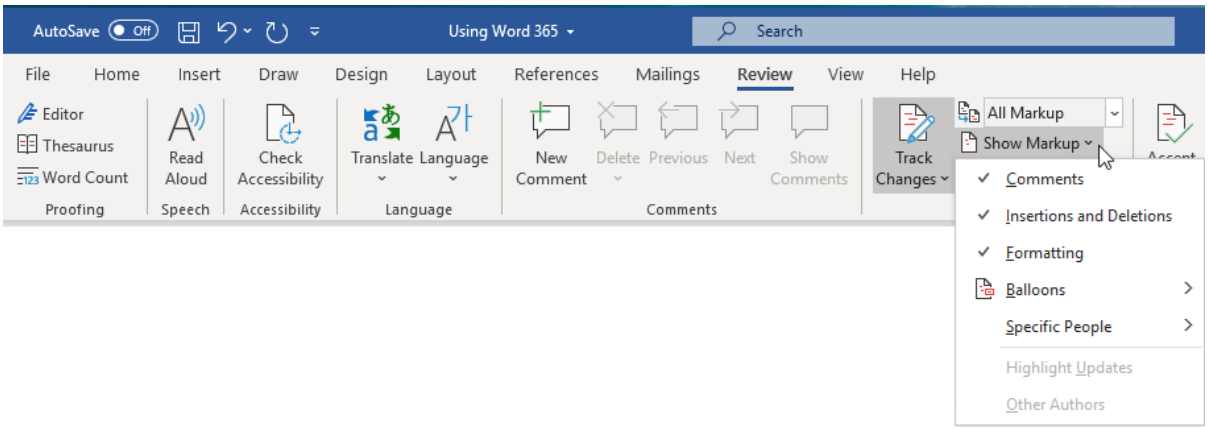


This drop-down menu contains four options:

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.

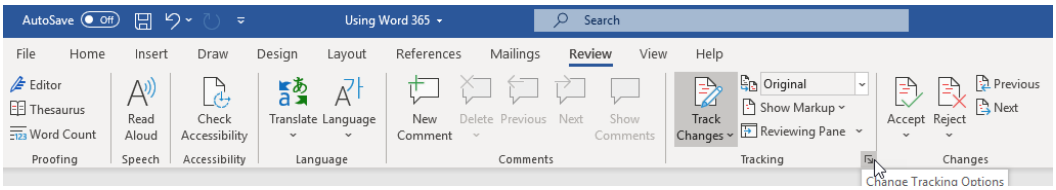
You can also use the Show Markup menu to control what types of markup elements are displayed in the document, or to filter out markup from particular reviewers:



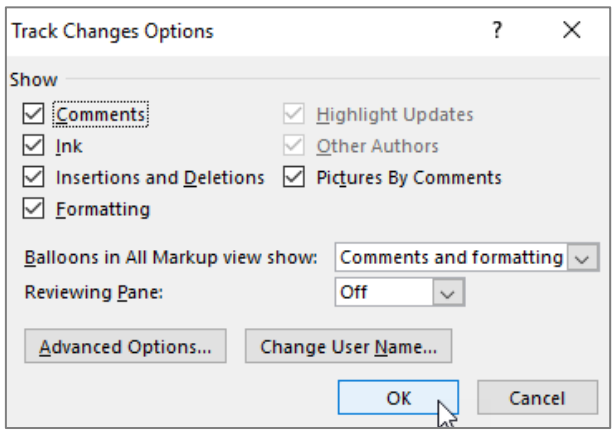
Like the Show Markup menu, no markup will be permanently removed using the commands in this menu.

Track Changes Options

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



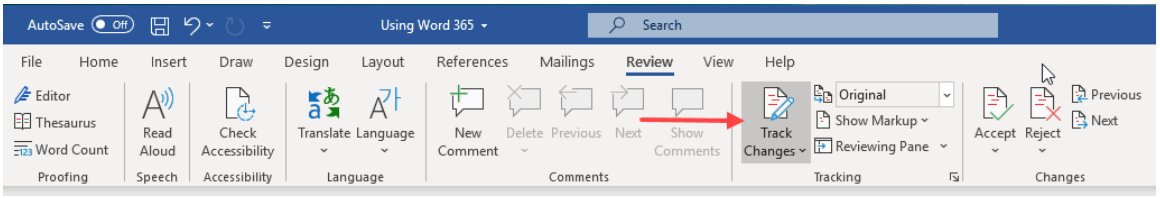
The Track Changes Options dialog box will appear:



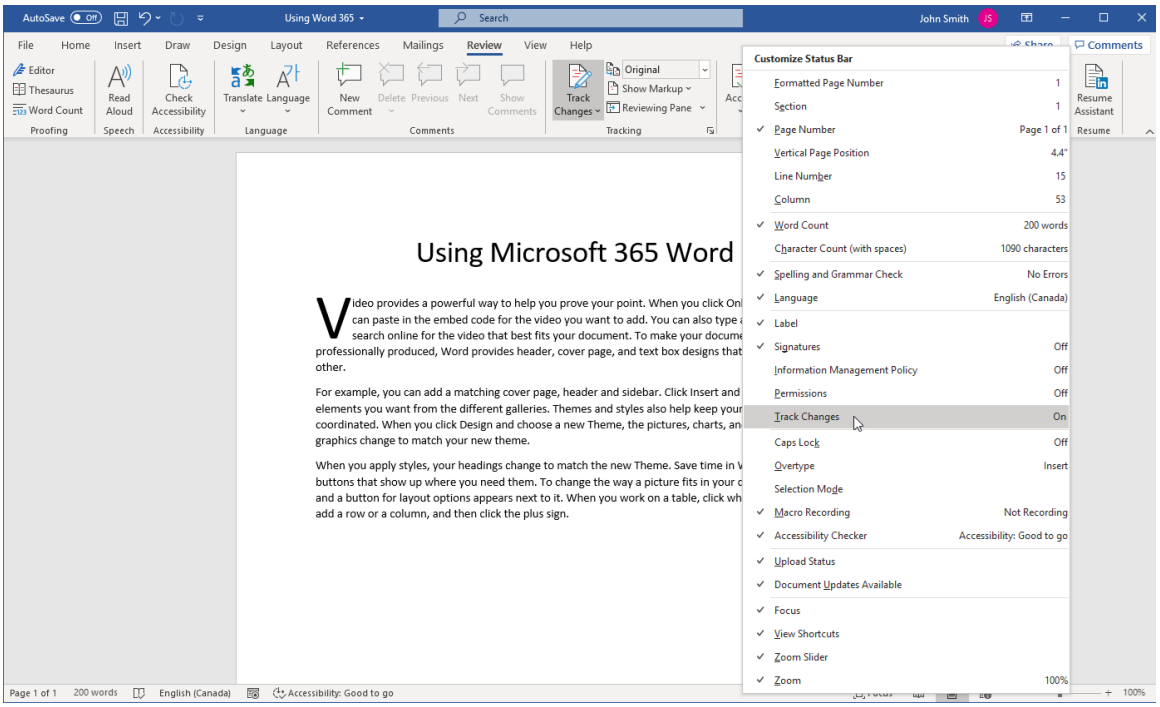
Here, you can change every aspect of how your changes are tracked. To apply options, click **OK** when you have finished setting your options.

The Track Changes Indicator

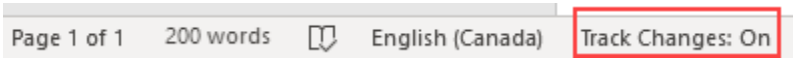
You can tell if Track Changes is enabled by looking at the Review tab. If the command is shaded, then Track Changes is turned on:



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

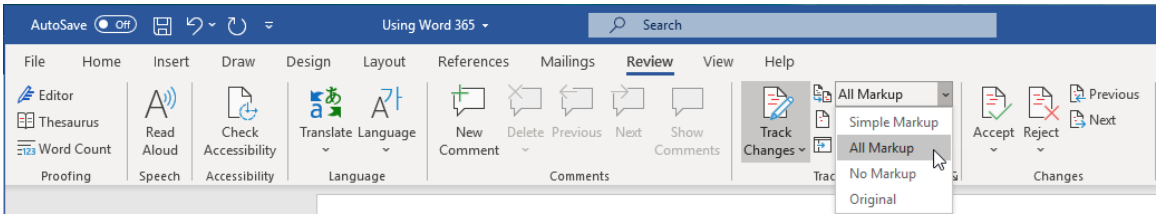


Now, you can see whether the feature is on or off just by looking at the status bar. You can also click the indicator to toggle it on or off:

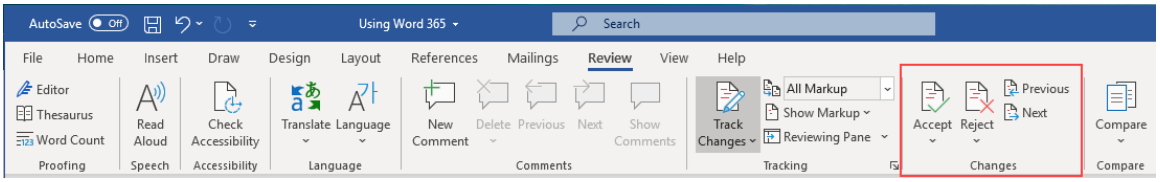


Reviewing Changes

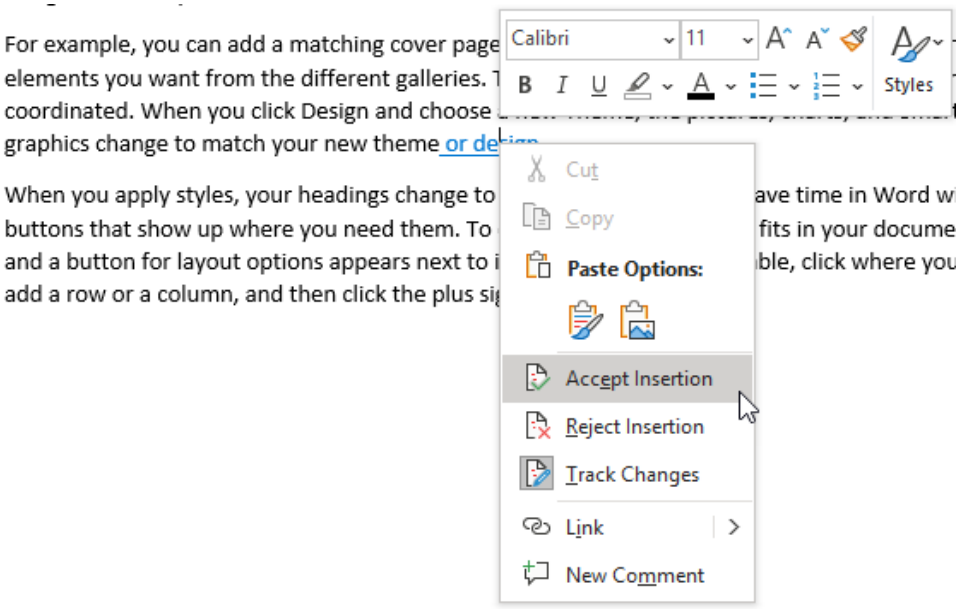
Let's say you have received a document with tracked changes. First, you should ensure that all markup is being shown. This will make it a lot easier to view all of the changes:



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**:



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



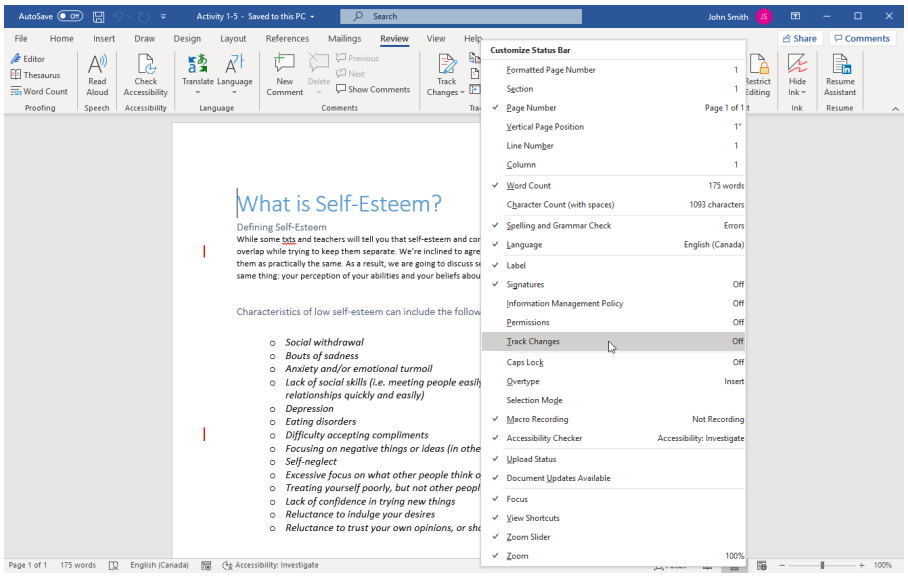
If you accept a change, that change becomes part of your document and any markup (including corresponding vertical lines in the left margin) will be removed. If you reject a change, the change and any associated markup will be removed.

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.

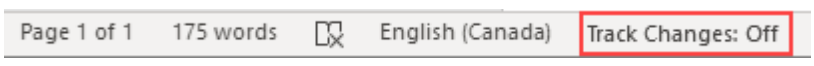
1. Open Microsoft 365 Word and open Activity 1-5:

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**:

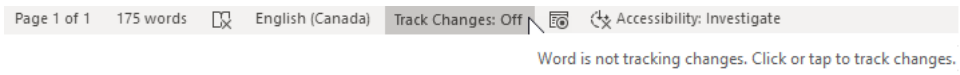


(If there is already a checkmark beside this entry, skip to the next step.)

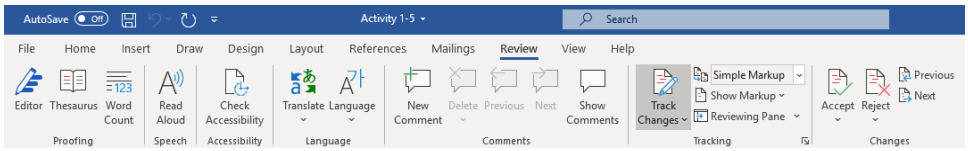
3. Click outside the menu to close it. You can see that Track Changes is currently turned off:



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



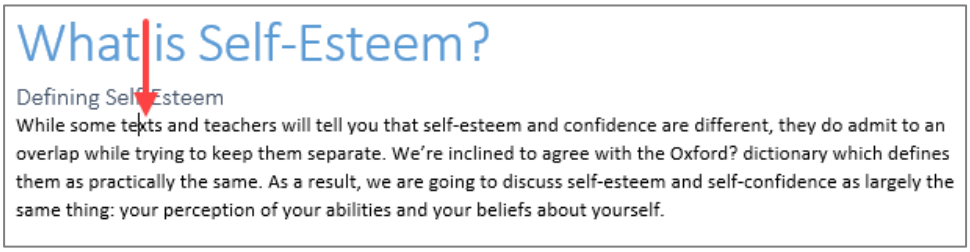
5. Click the **Review** tab to confirm the feature is enabled:



(Remember, the button should be shaded.)

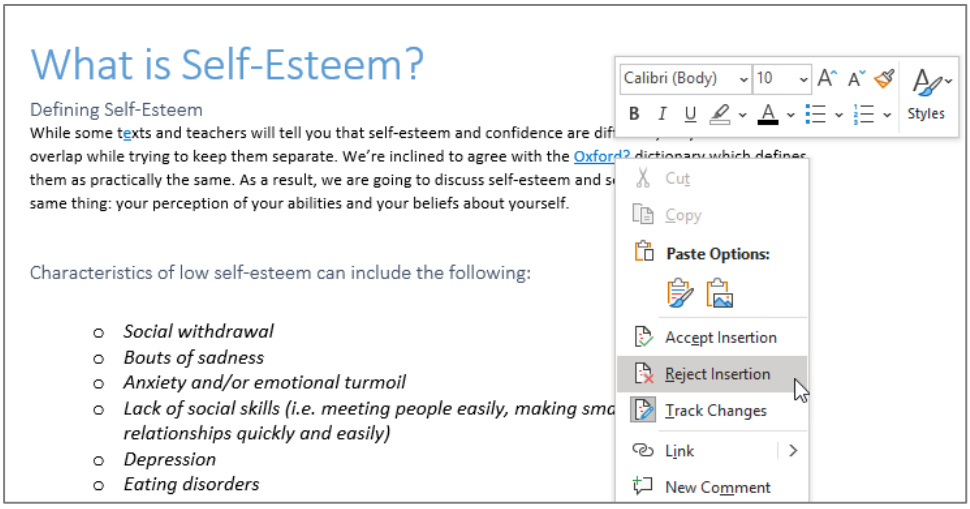
6. Now, let's review the document. There is a typo in the first line. Correct it to "texts:"

:

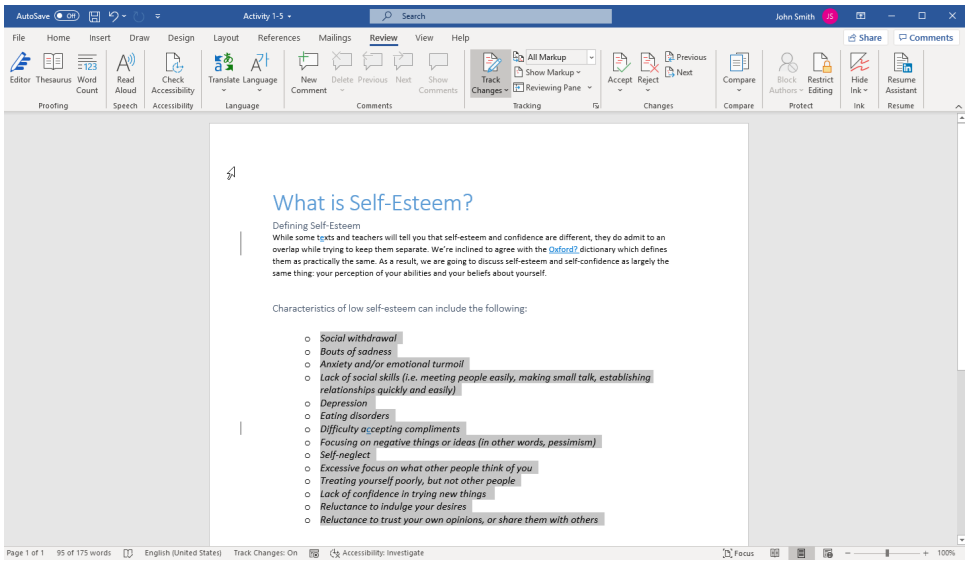


(If there is already a checkmark beside this entry, skip to the next step.)

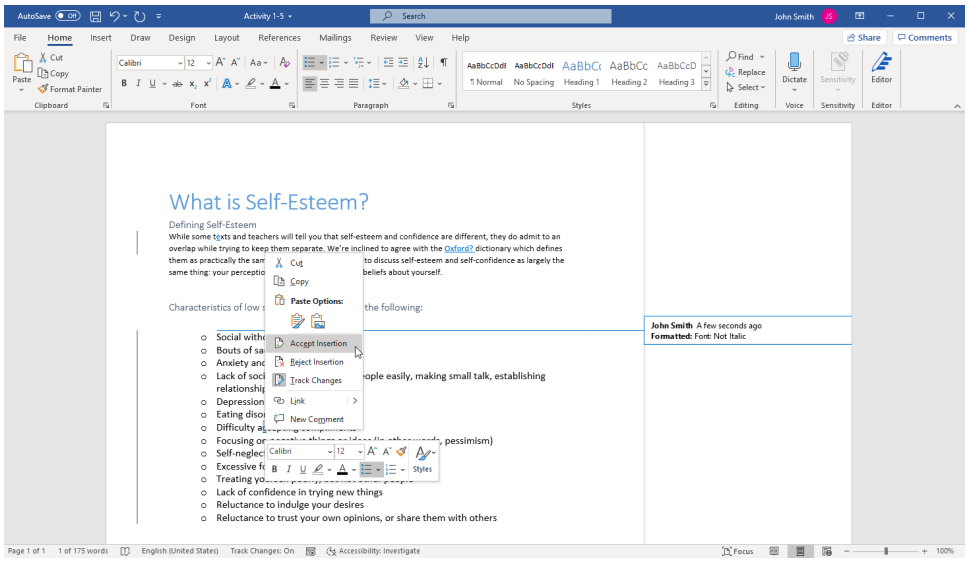
7. The previous editor has added an unnecessary modifier to the word "dictionary." Let us reject this change by right clicking the word and choosing the appropriate option:



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**:



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.

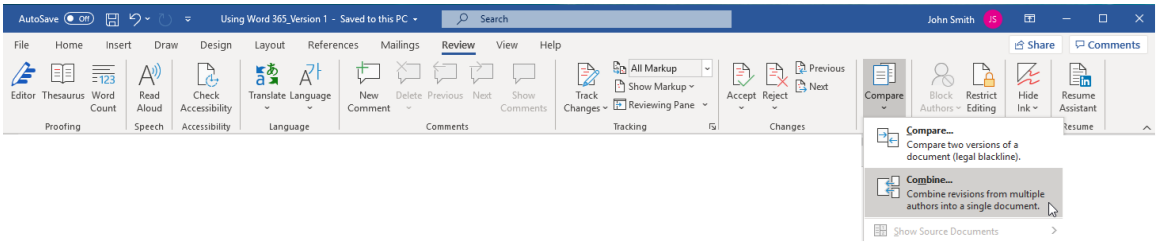
Topic Objectives

In this session, you will learn:

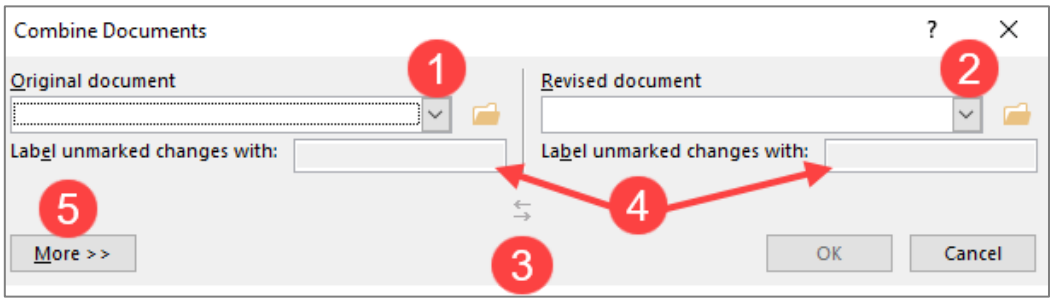
- How to combine document modifications from multiple reviewers
- How to use the Revisions pane
- How to resolve style conflicts

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 → Compare → Combine**:



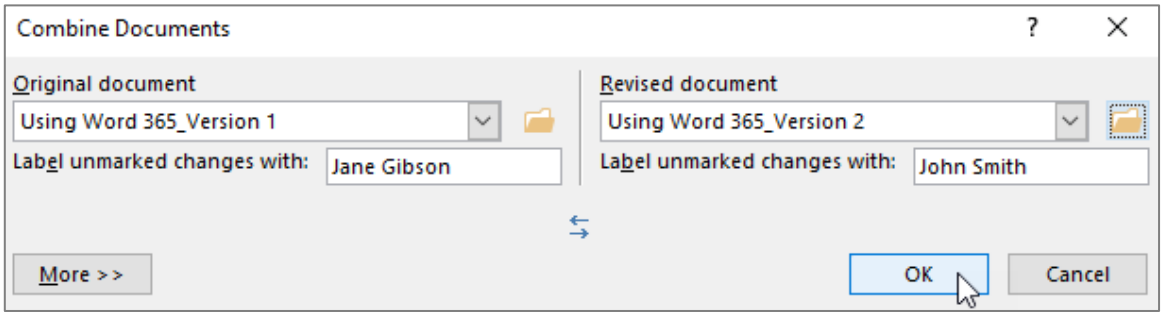
The Combine Documents dialog box will appear, which is very similar to the Compare Documents dialog box that we explored earlier:



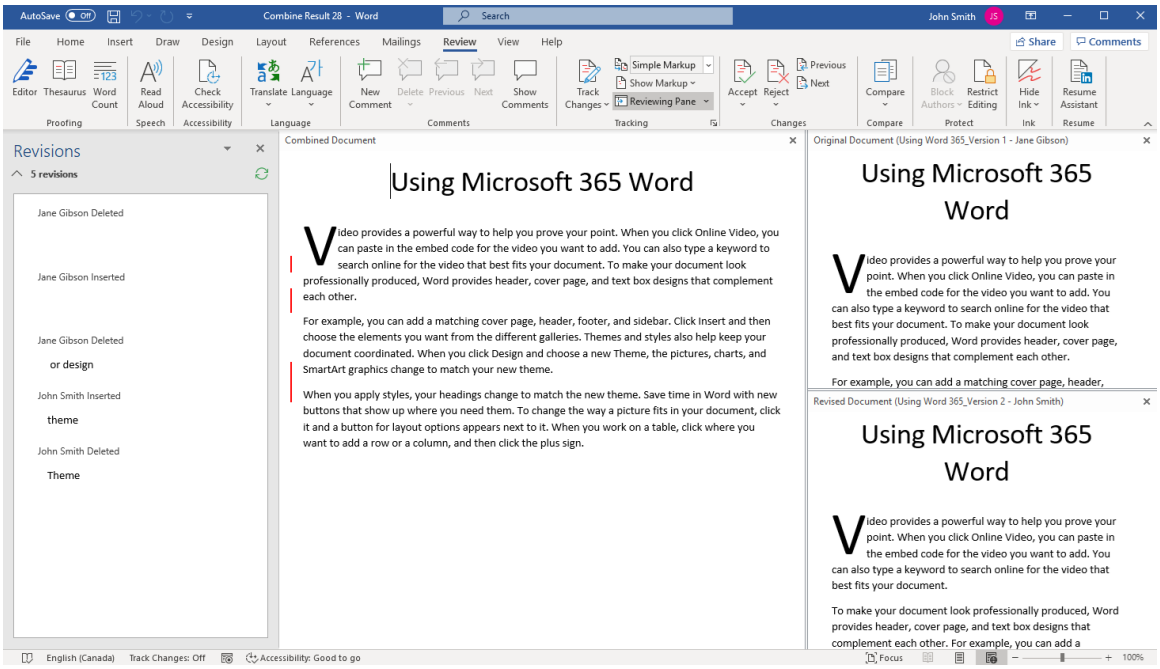
At the top, you can choose **the original document (1)** and the **revised document (2)**. (You can do this via the drop-down menus or the Browse button. You can also reverse the labels for the

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:



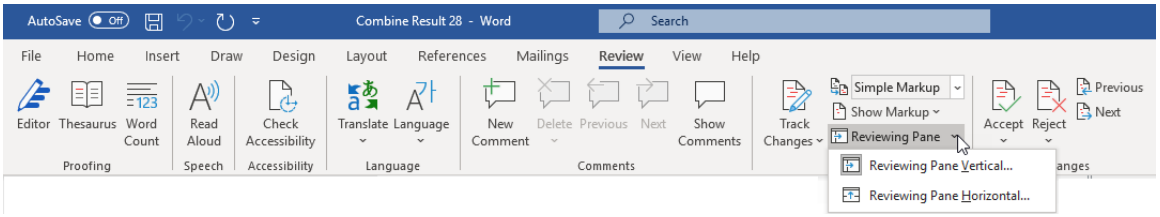
By default, the documents will be combined into a new document, with the results shown as tracked changes:



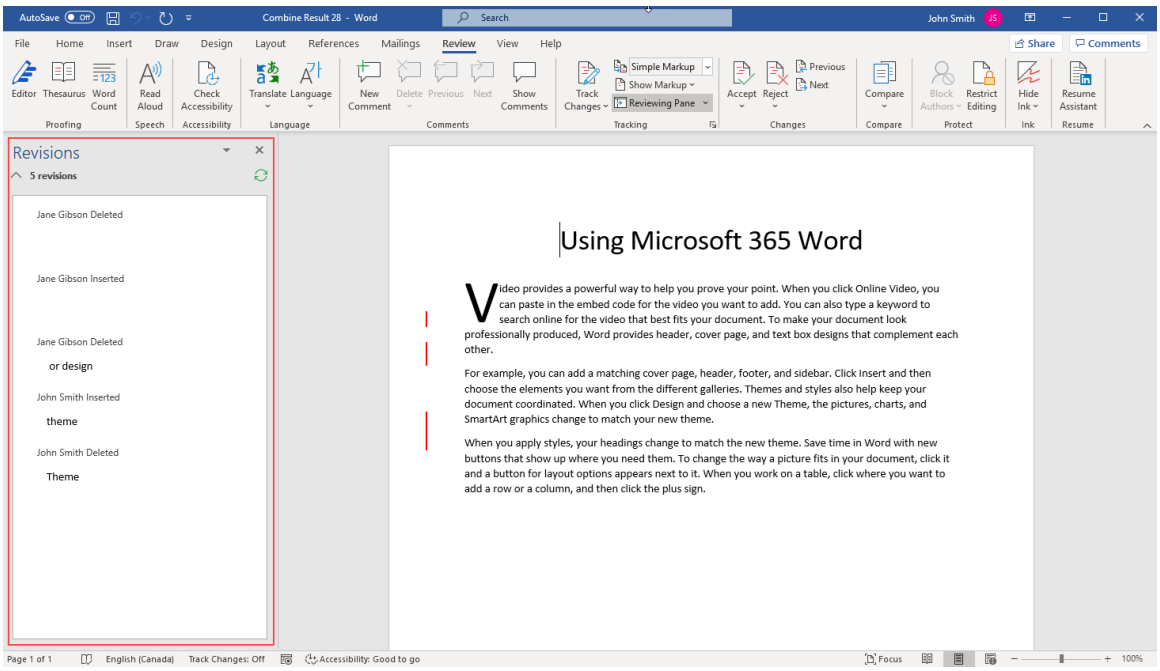
You can now work with the document as you would normally.

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:



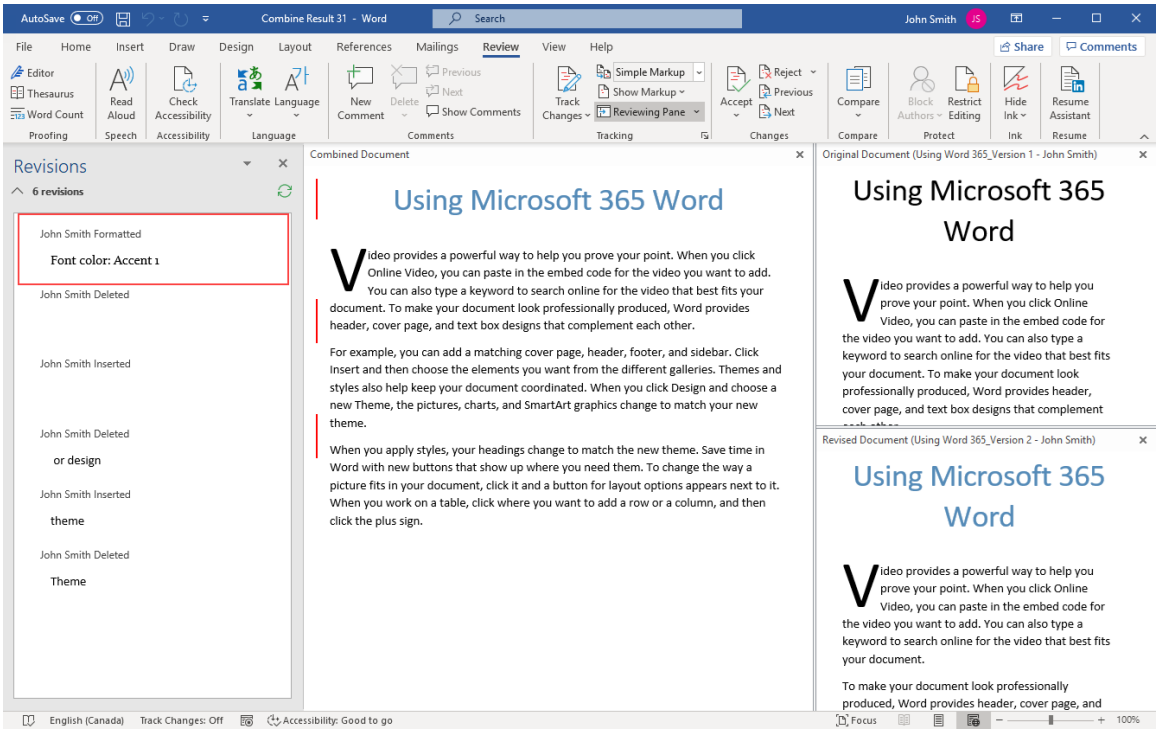
For this example, the Revisions pane has been placed vertically. It is visible on the left-hand side of the window:



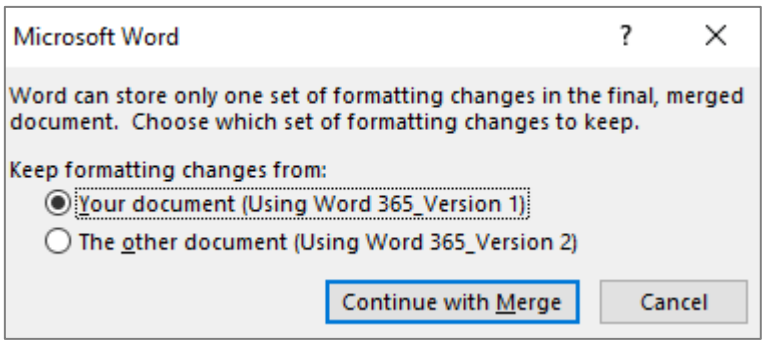
As you can see, this pane summarizes and categorizes every tracked change made to the document. Simply click a change to display and select it.

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:



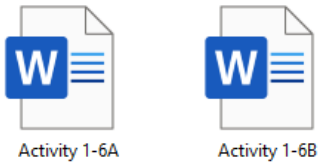
If both sets of documents contain formatting changes, the changes from the second document will be imported into the newly combined document when the combine is performed:



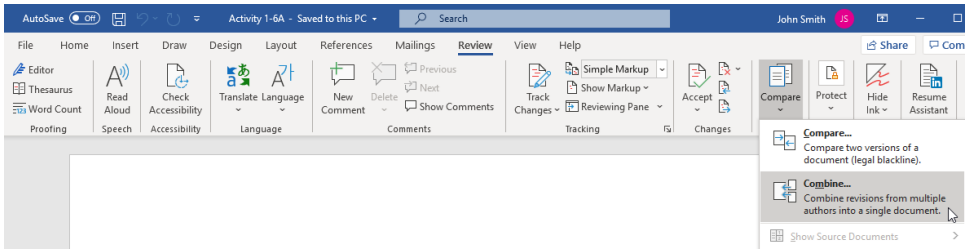
Activity 1-6: Merging Document Changes

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.

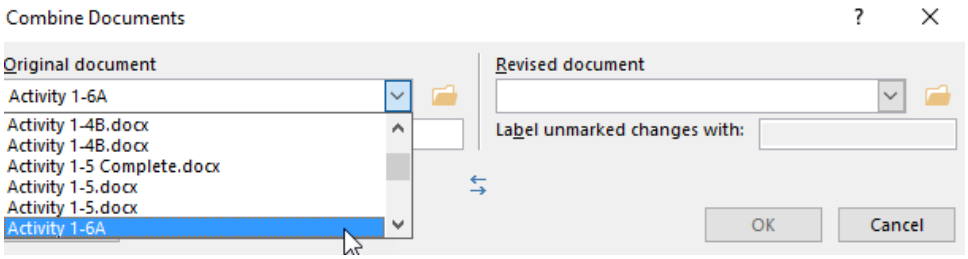
1. To begin, open Activity 1-6A and Activity 1-6B in Microsoft 365 Word. Maximize both documents:



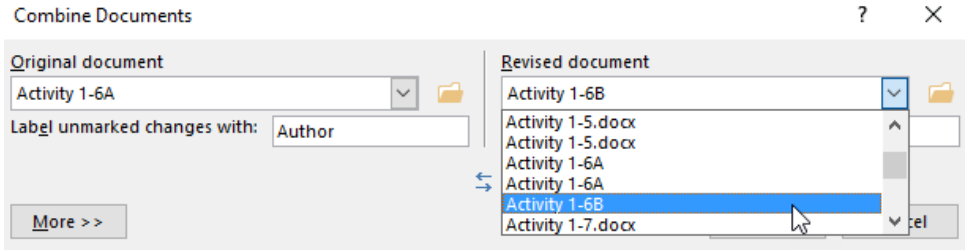
2. In either document, click **Review → Compare → Combine**:



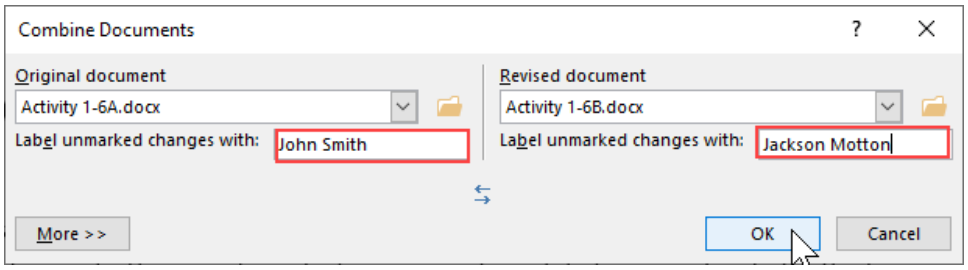
3. The Combine Documents dialog box will open. Choose Activity 1-6A as the original document:



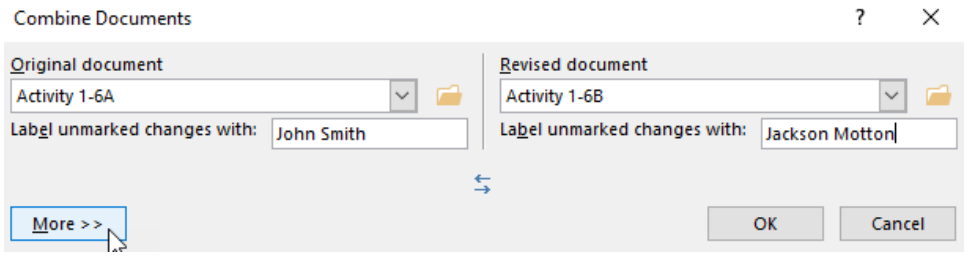
4. Choose Activity 1-6B as the revised document:



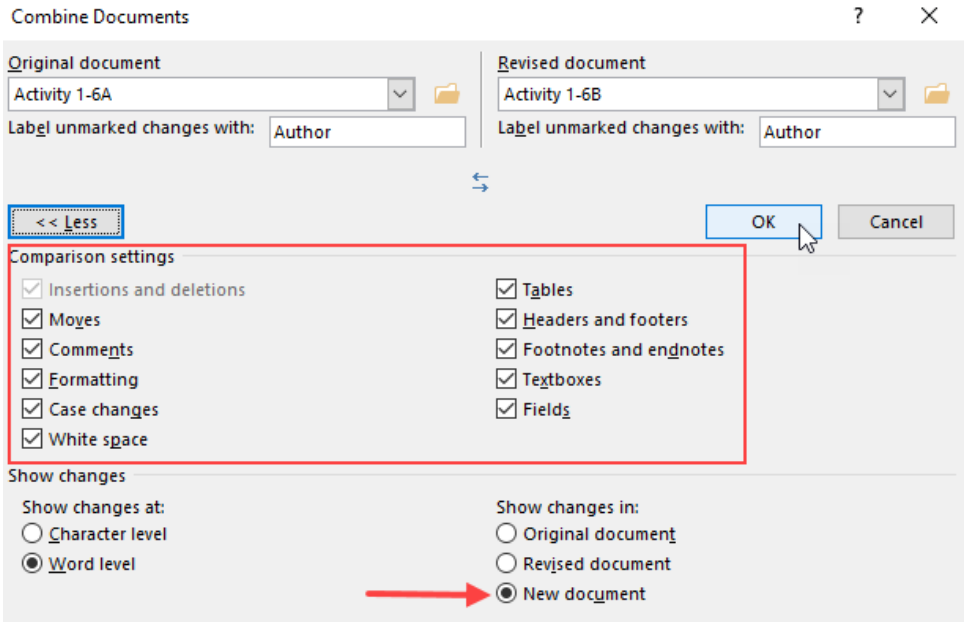
5. Change the first "Label unmarked changes with" field to "John Smith." As well, change the second "Label unmarked changes with" field to "Jackson Motton:"



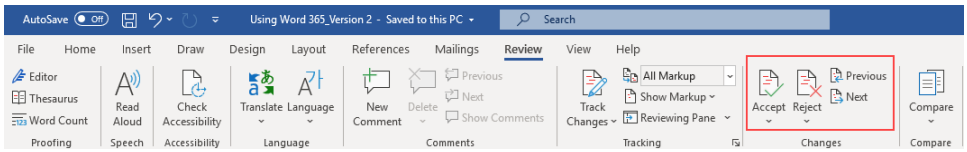
6. Click **More** to view advanced options:



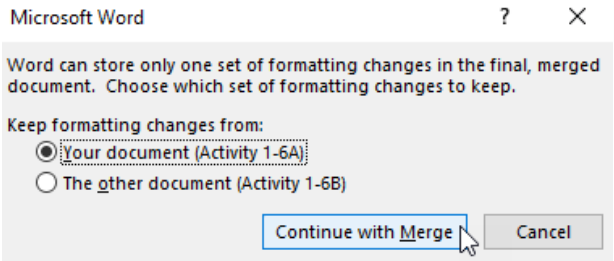
7. Ensure that all options in the "Comparison settings" section are checked. As well, ensure that the "Show changes in" option is set to "**New document**." Click **OK** to combine the documents:



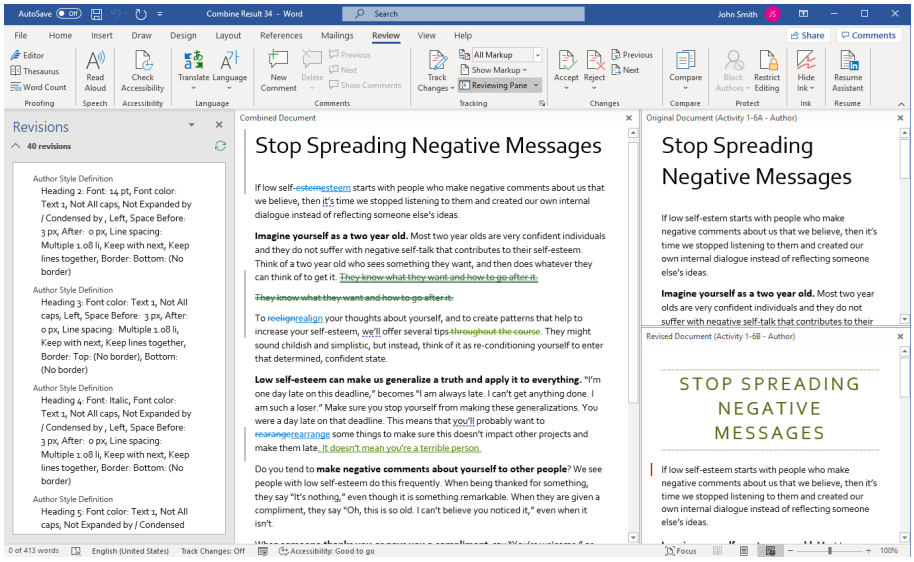
8. Word has updated the way it handles Style conflicts. Instead of having you choose between old and new styles you now get a fluid layout of your document allowing you to resolve conflicts under the **Review → Changes** submenu.



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.

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.

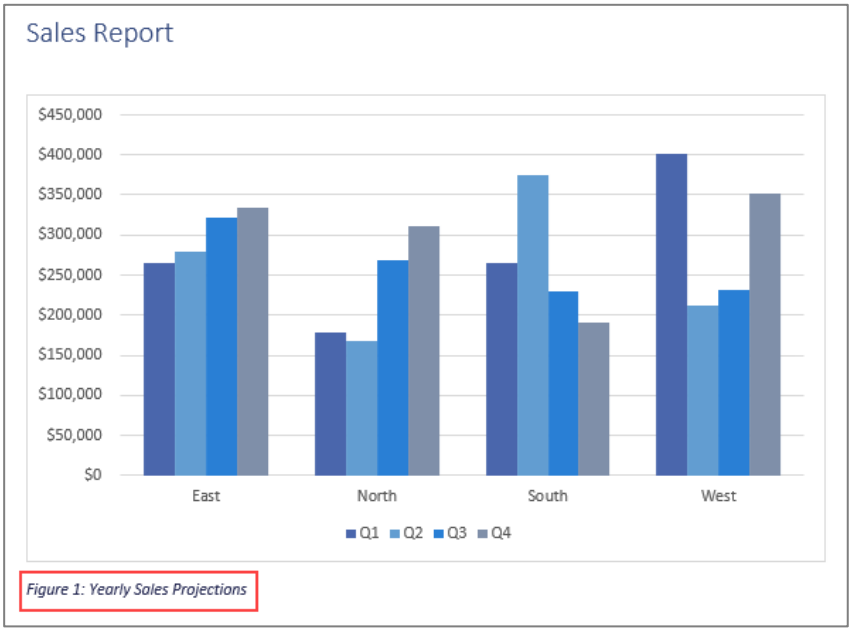
Topic Objectives

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

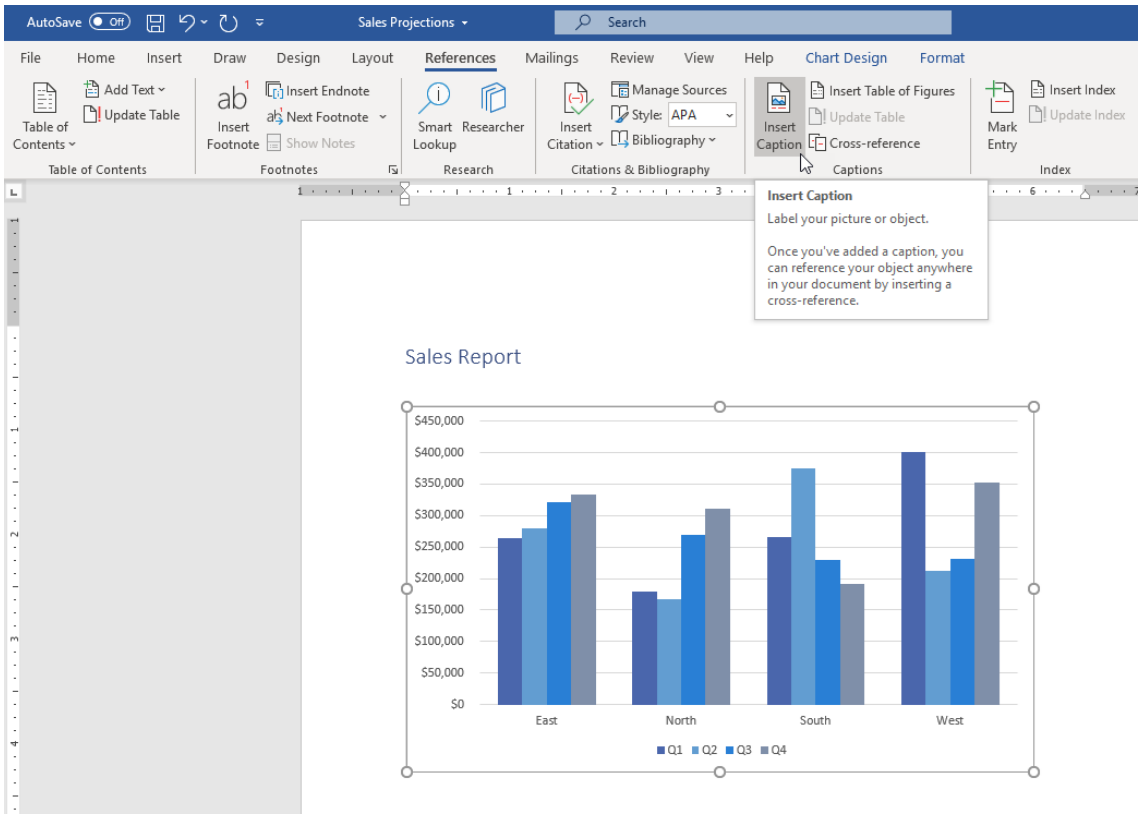
Captions

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 cross-reference links and as entries for tables of figures. Here is a sample caption for a chart:

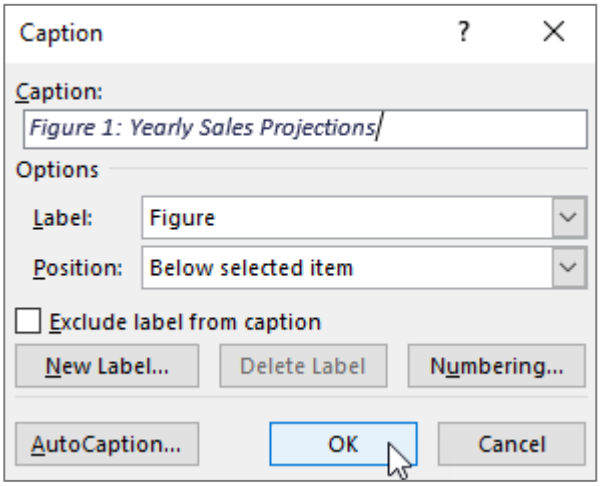


Adding Captions

To insert a caption, click the drawing or figure that you would like the caption to be applied to. Then, click **References → 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.

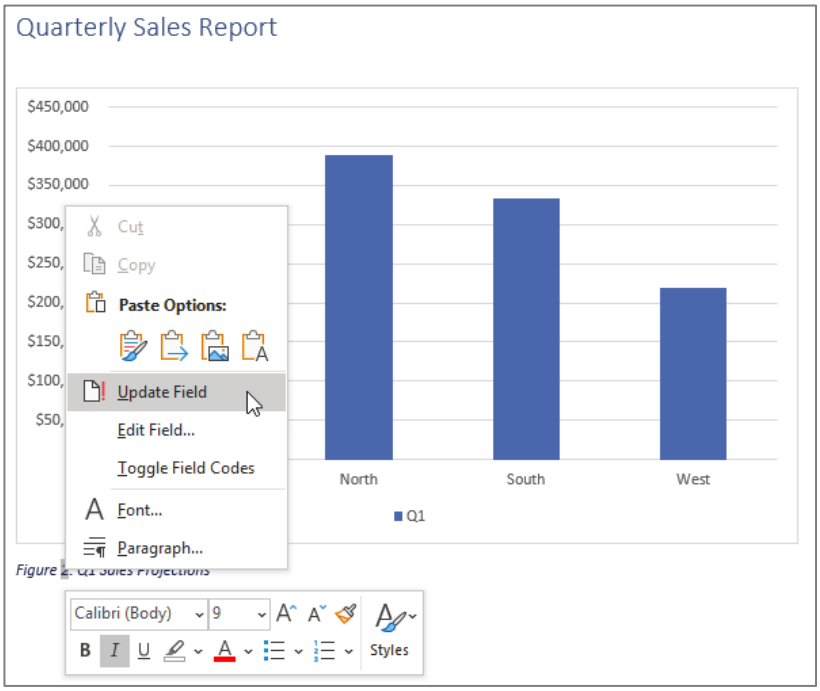
There are a variety of commands available in the Caption dialog box that you can use to customize your caption:

- **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.

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:

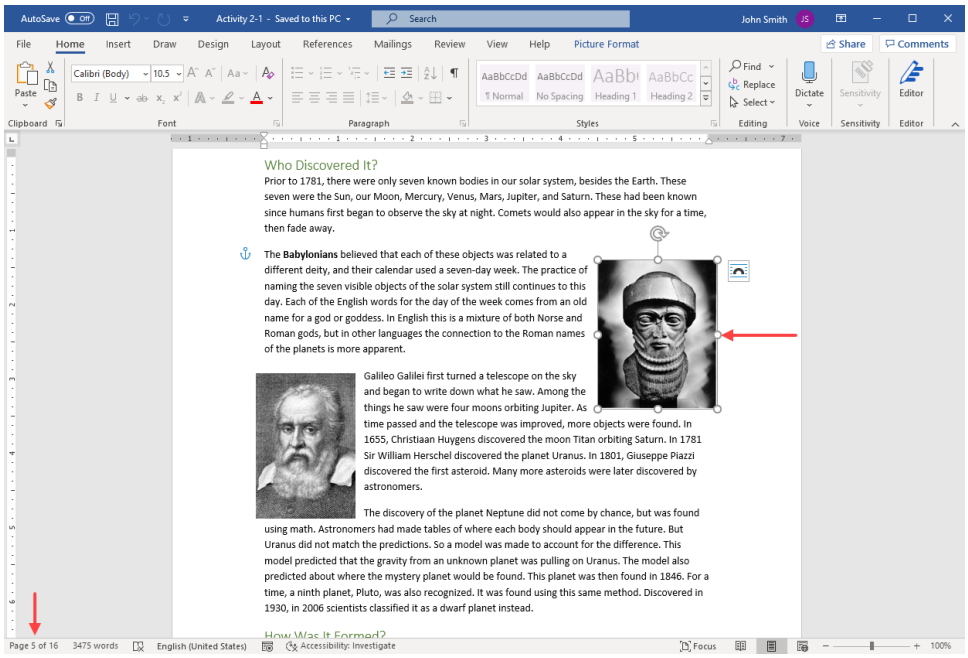


Activity 2-1: Adding Captions

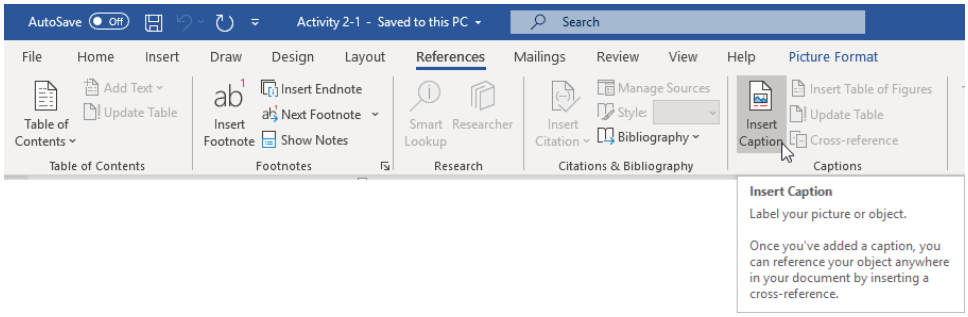
In this activity, you will add captions to several images and diagrams in a document. Note that when we refer to a page number, we are referring to the physical location of the page, not the formatted number that appears on the page.

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

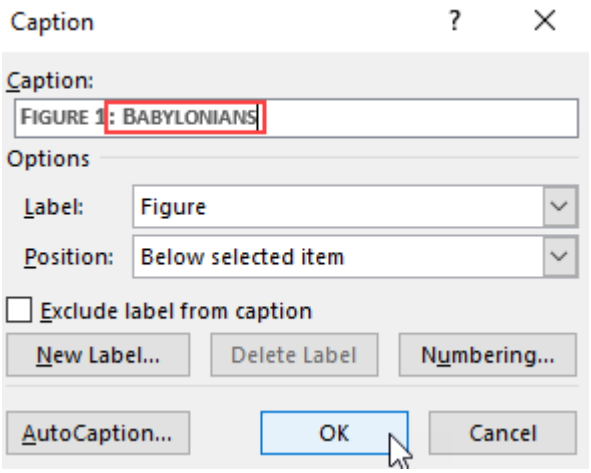
2. Go to the fifth page of the document. Click to select the first image on the page:



3. Click **References → Insert Caption**:

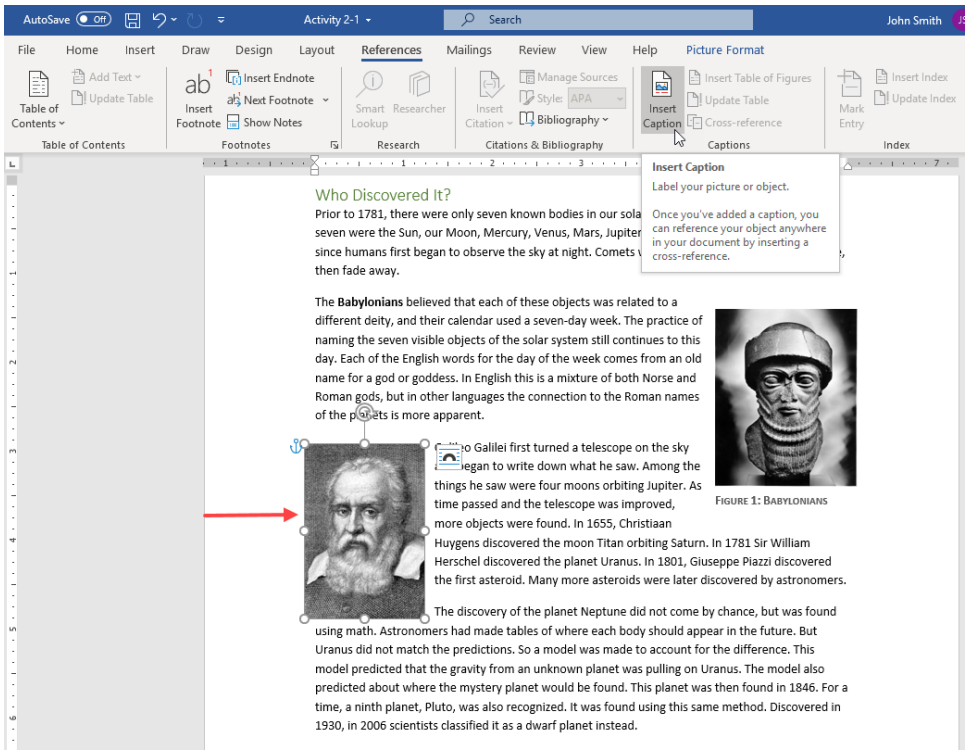


4. The Caption dialog box will open. Let's leave the label as "Figure." In the Caption text box, type a colon and a space after the label and type ":Babylonians." Click **OK**:

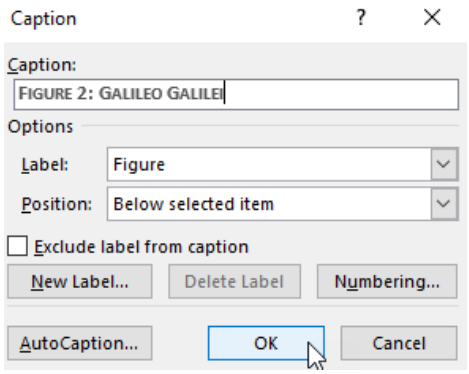


5. The caption will be inserted:

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



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



8. The caption will be inserted:

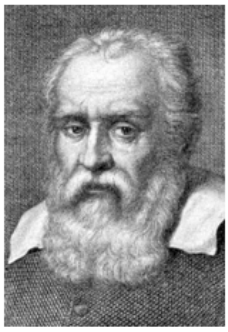
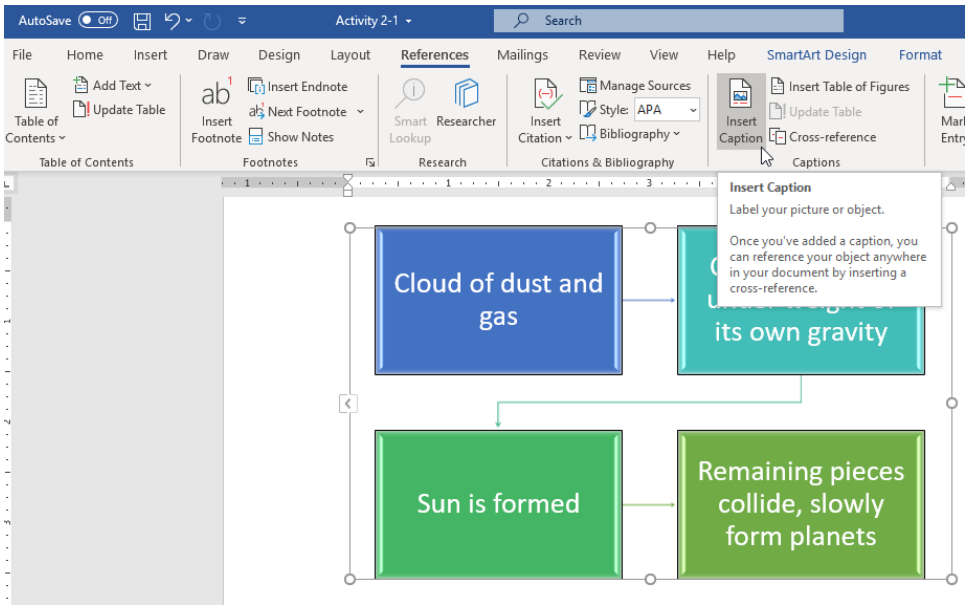
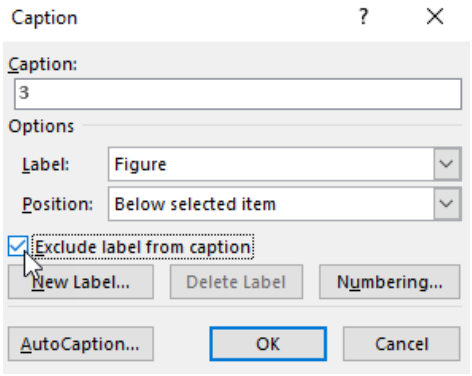


FIGURE 2: GALILEO GALILEI

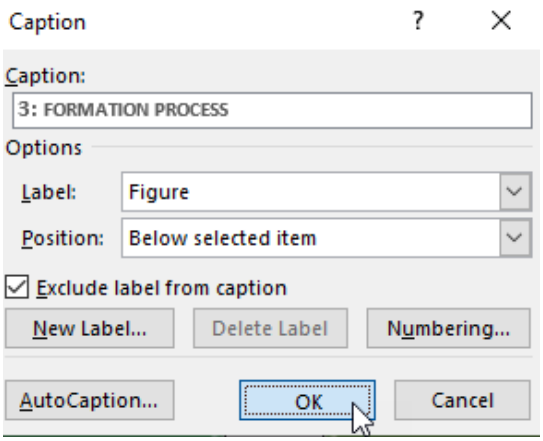
9. Go to the next page of the document. Click the SmartArt diagram to select it. Click **References → Insert Caption**:



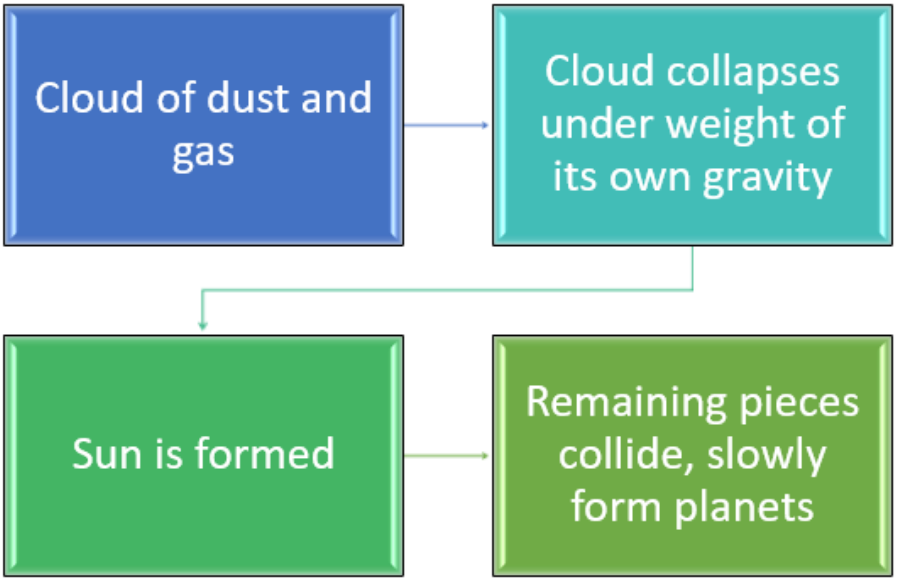
10. Check the "Exclude label from caption" box:



11. Type ":Formation process" in the Caption text box and click **OK**:



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.

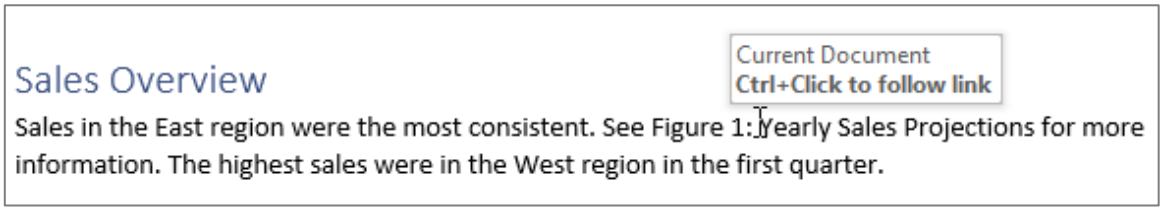
Topic Objectives

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

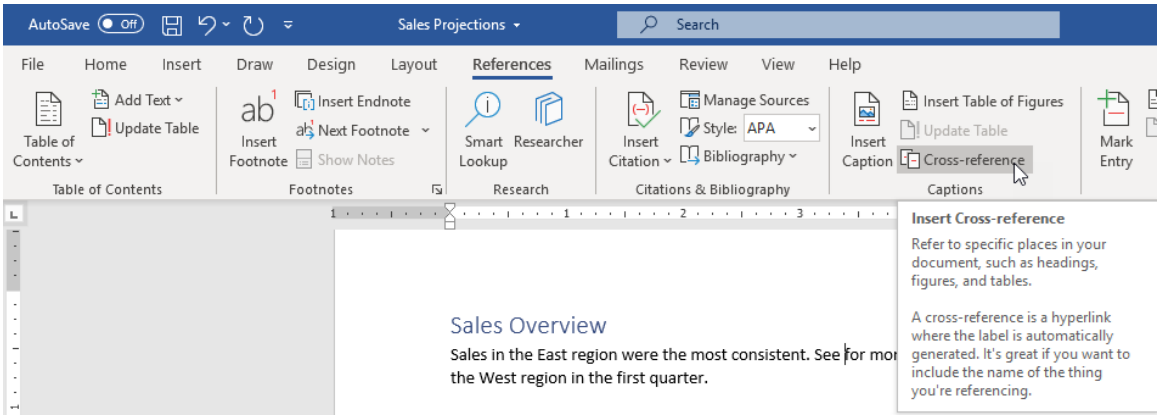
Cross-References

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:



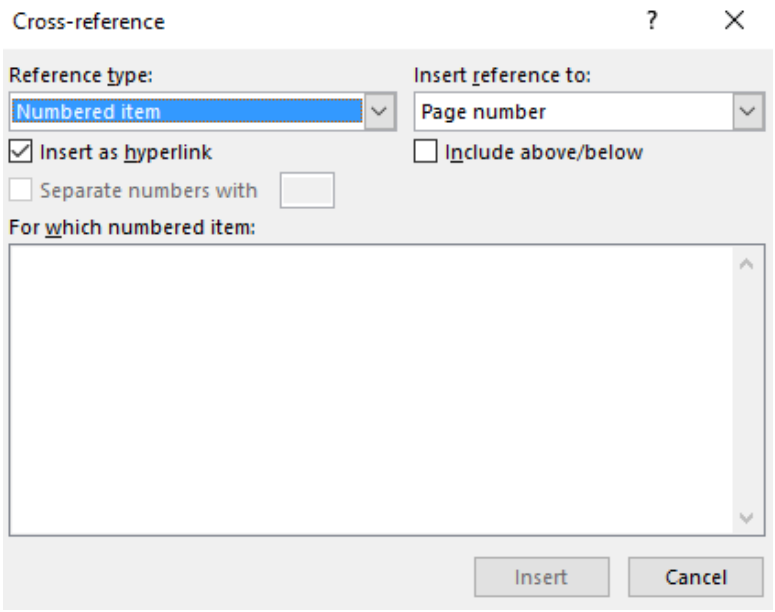
Adding Cross-References

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

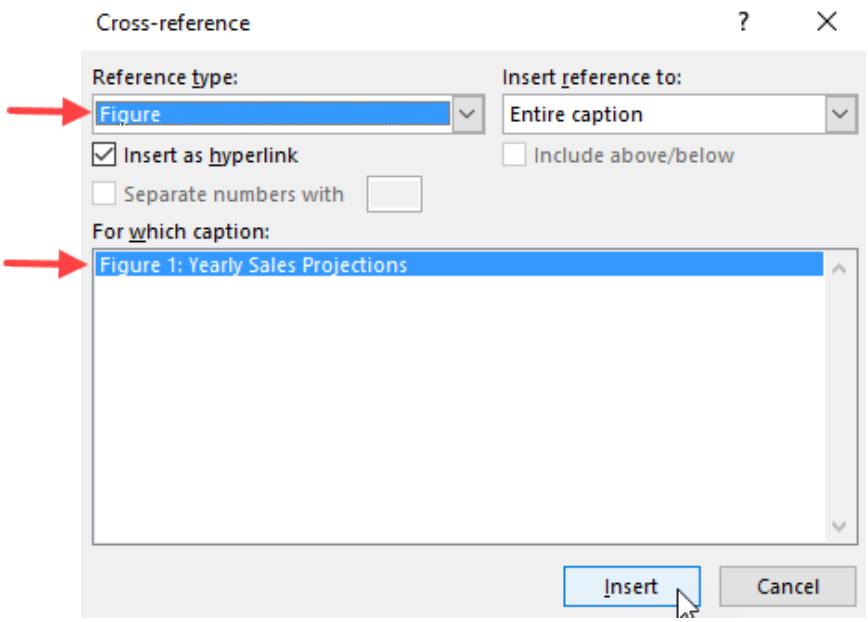


Cross-Reference Dialog Box

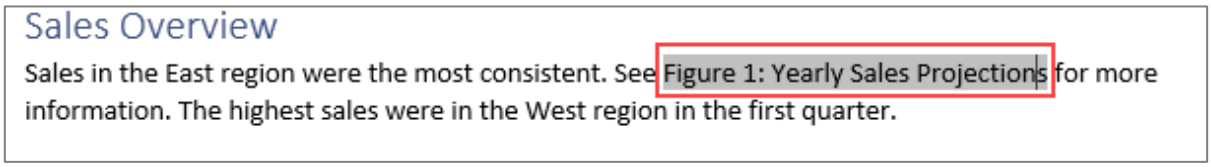
With either command, you will see the Cross-reference dialog box appear:



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:



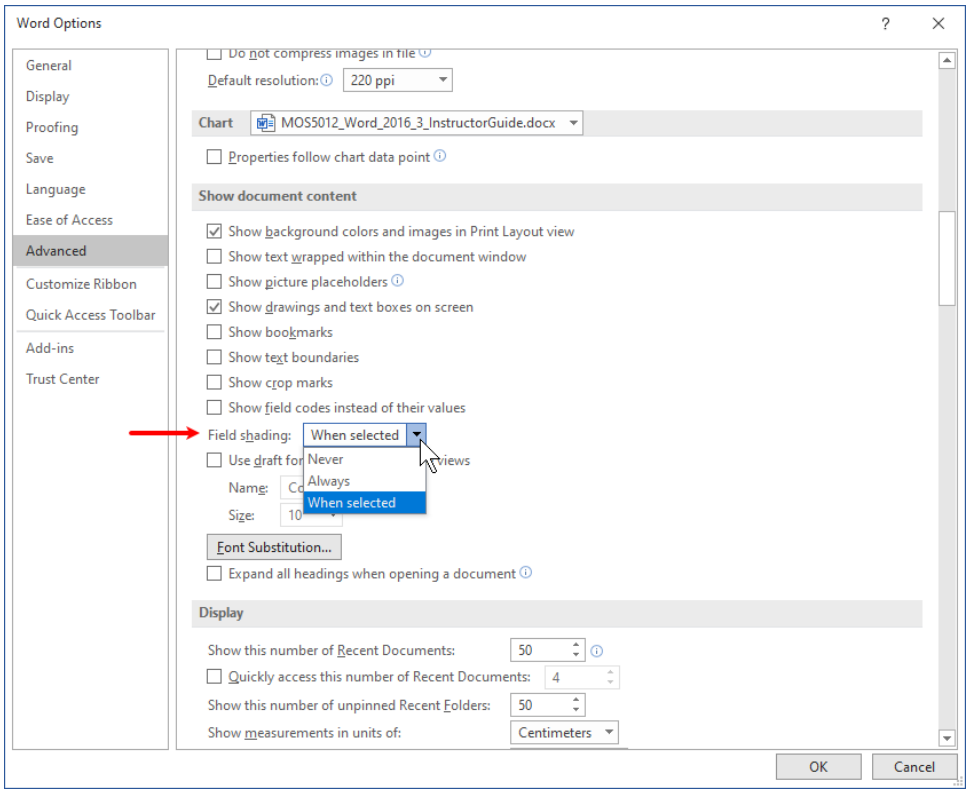
The link will be added:



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

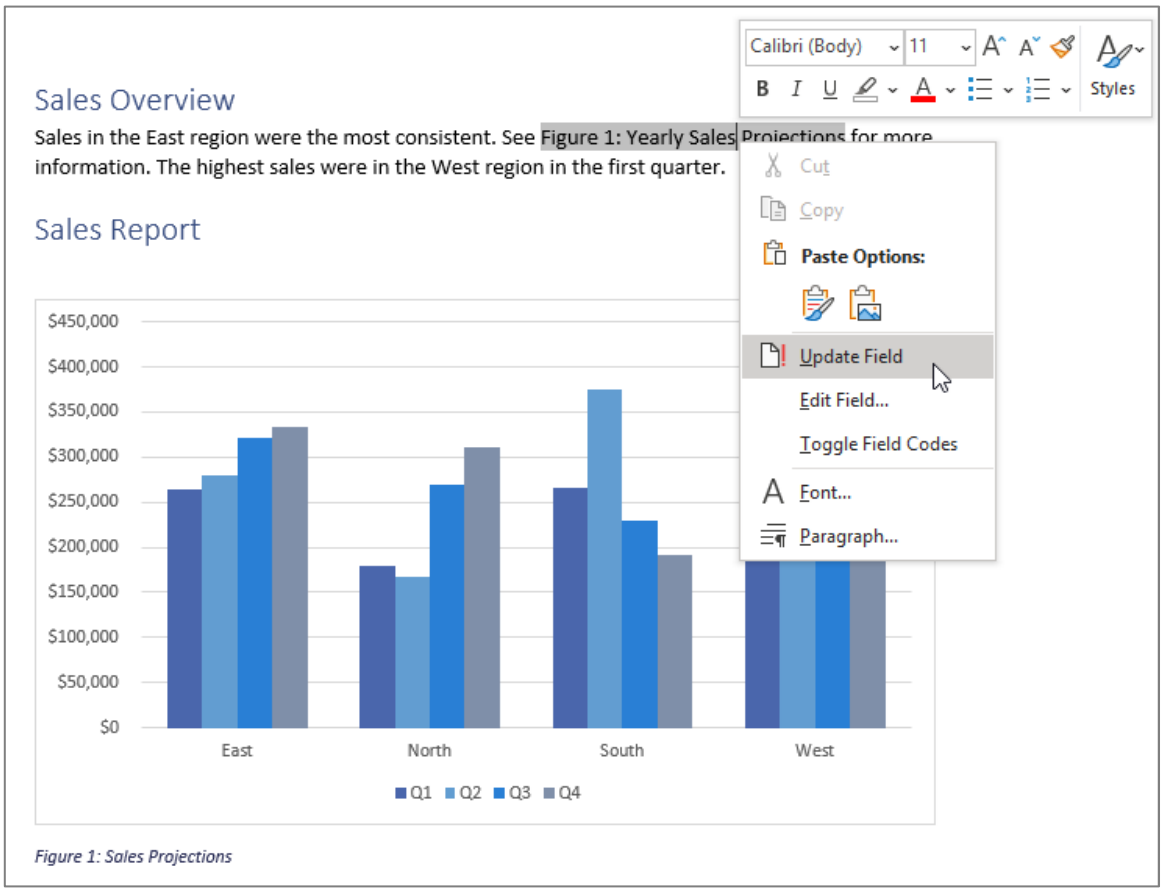
Shading Cross-References

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:



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**:

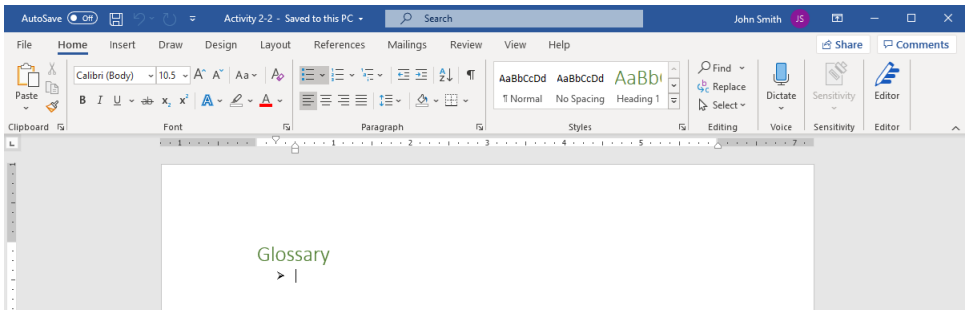


Activity 2-2: Adding Cross-References

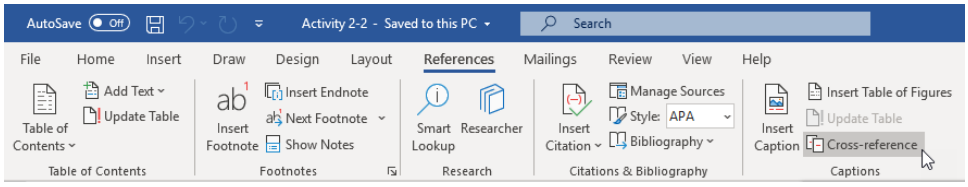
In this activity, you will add cross-references in the solar system document to create a glossary. Note that when we refer to a page number, we are referring to the physical location of the page, not the formatted number that appears on the page.

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

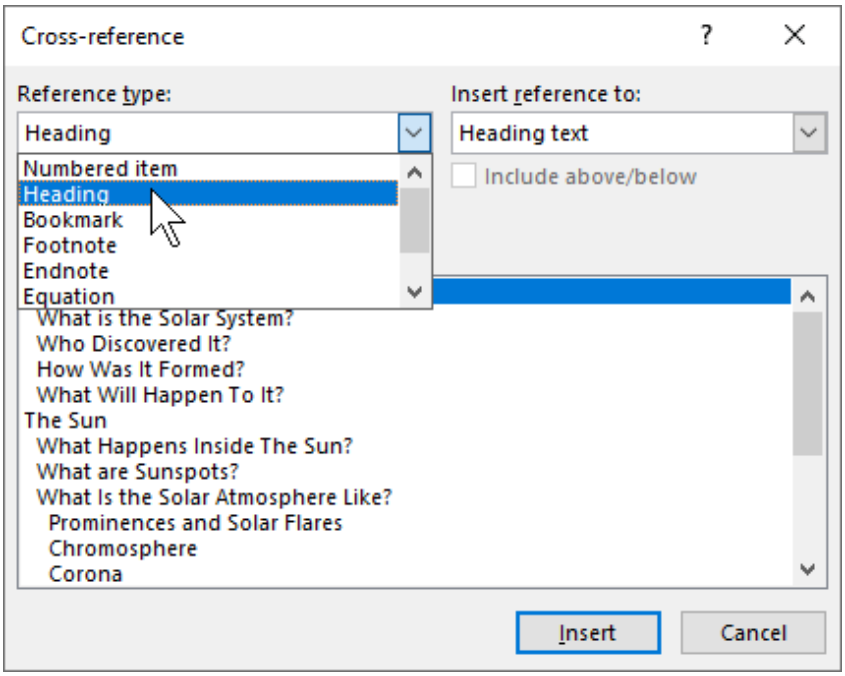
2. Go to the second-last page of the document. Click to place your cursor at the first bullet point:



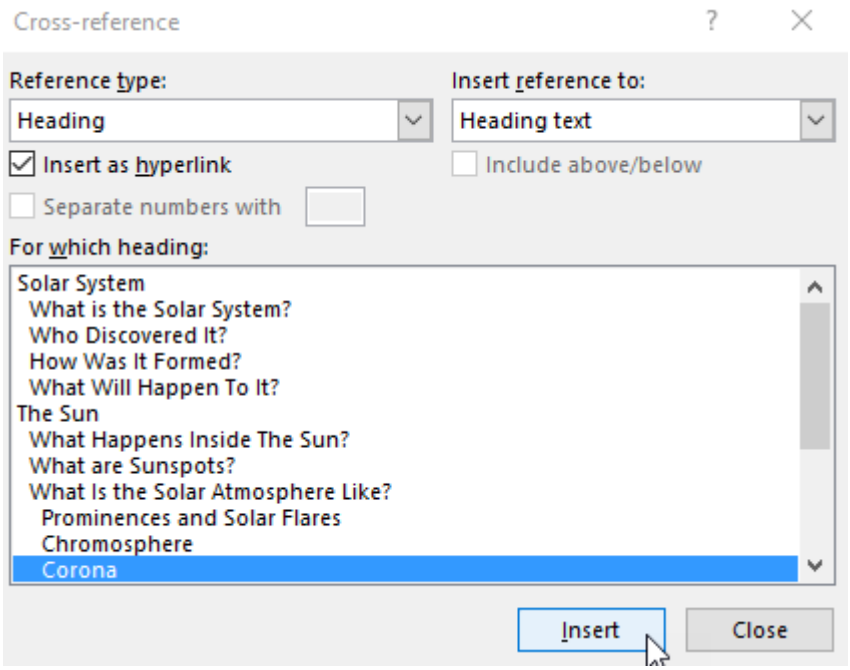
3. Next, click **References → Cross-reference**:



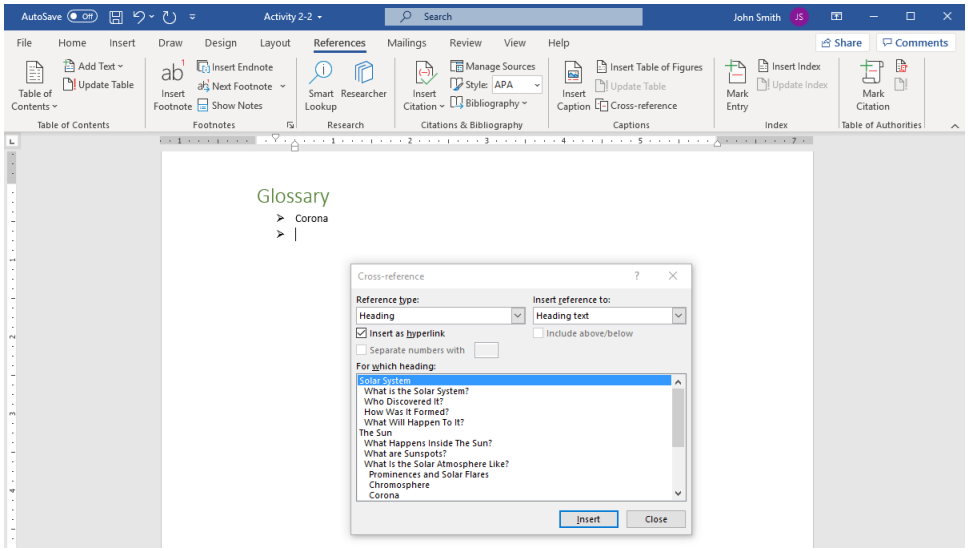
4. The Cross-reference dialog box will open. Click the "Reference type" menu at the top and click **Heading**:



5. Click the word “Corona” and click **Insert**:

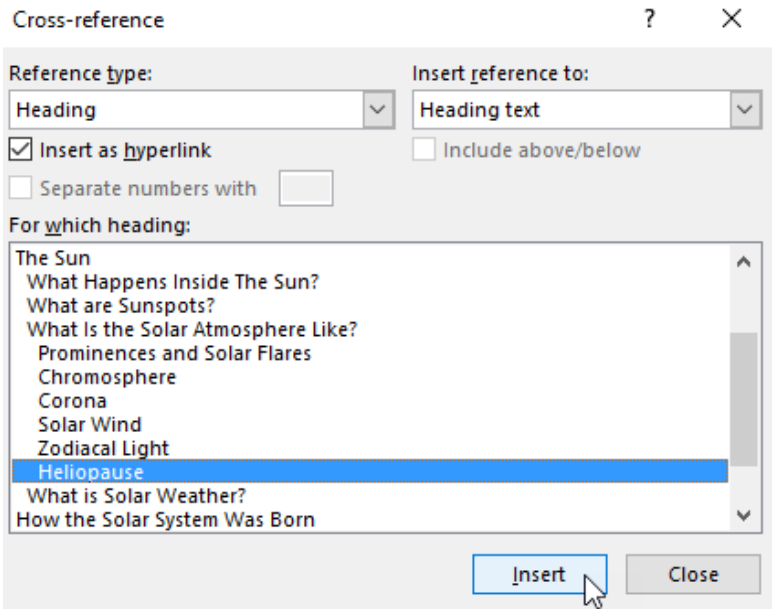


6. Leave the Cross-reference dialog box open. Click back inside the document at the end of the cross-reference. Press **Enter** to create a new bullet:

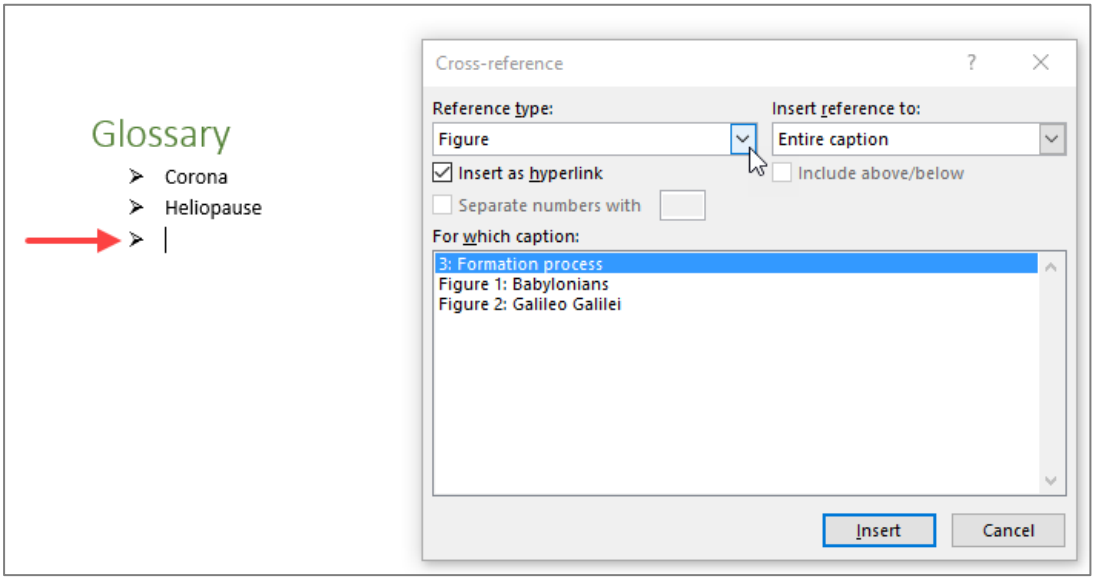


(If the Cross-reference dialog box disappears, just click References → Cross-reference again.)

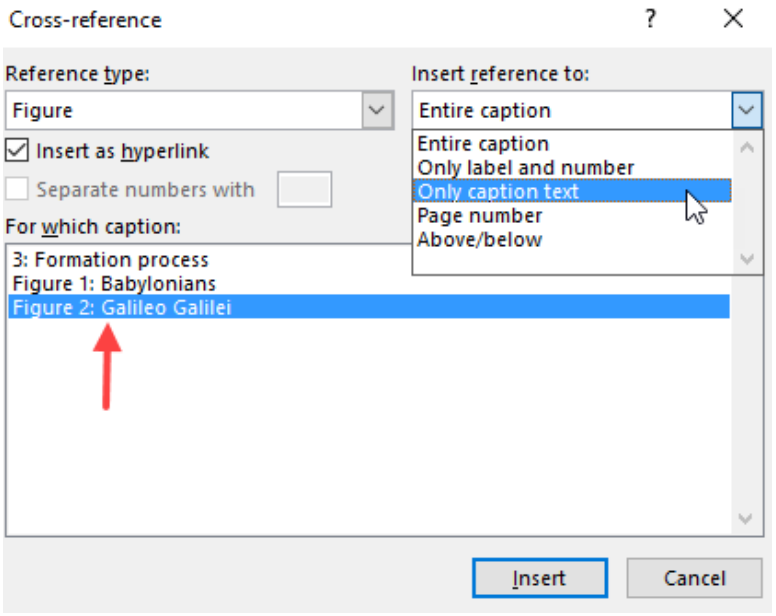
7. In the Cross-reference dialog box, scroll down in the list of headings. Click the heading "Heliopause" and click **Insert**:



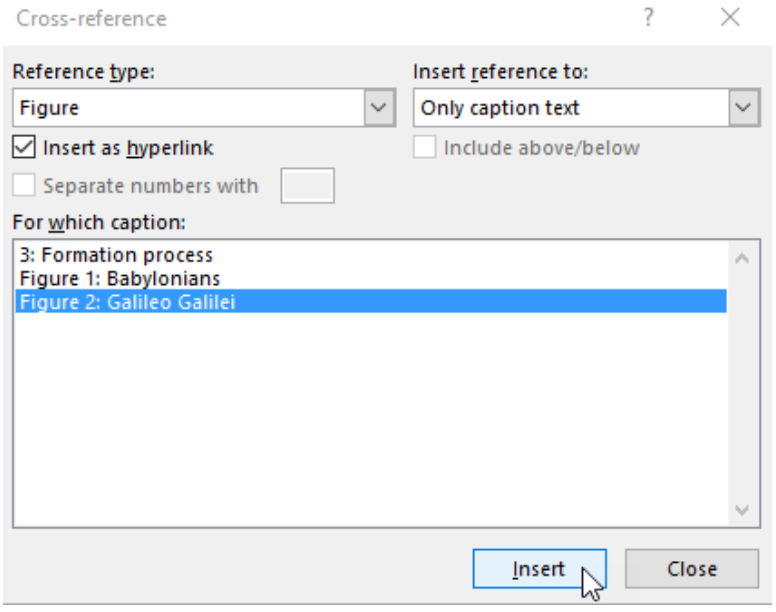
8. Add another new line to the glossary. Now, choose **Figure** as the reference type:



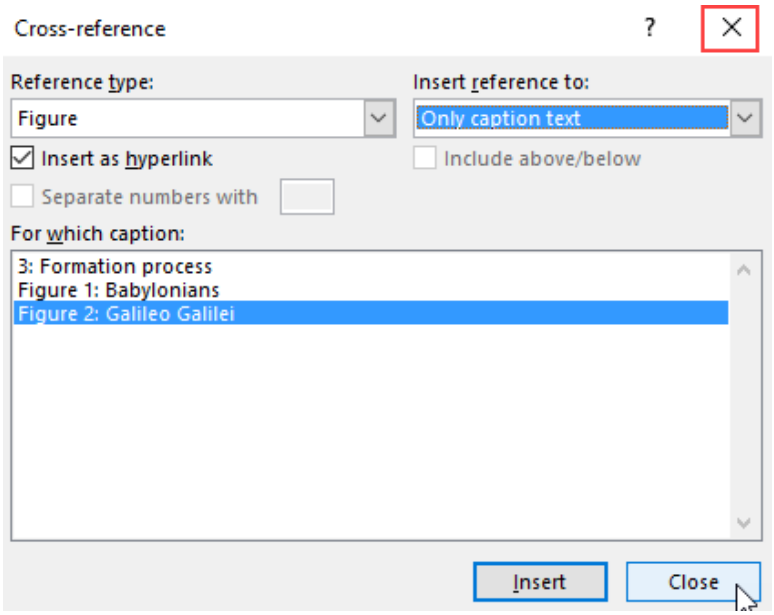
9. Select Figure 2. Click the "Insert reference to" menu and click "**Only caption text**:"



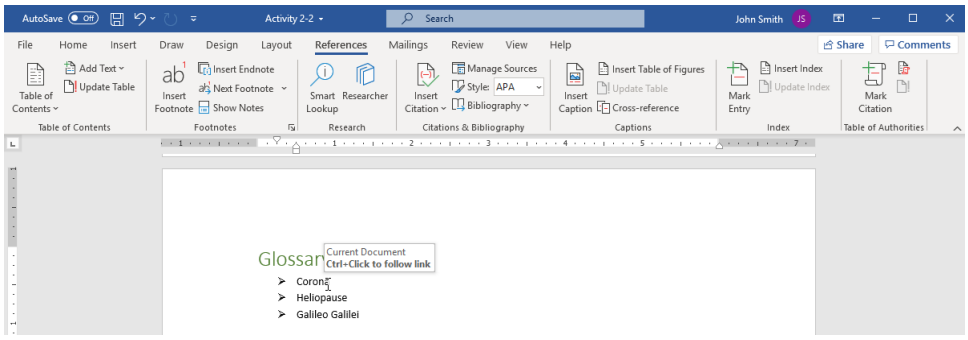
10. Click **Insert** to add the cross-reference:



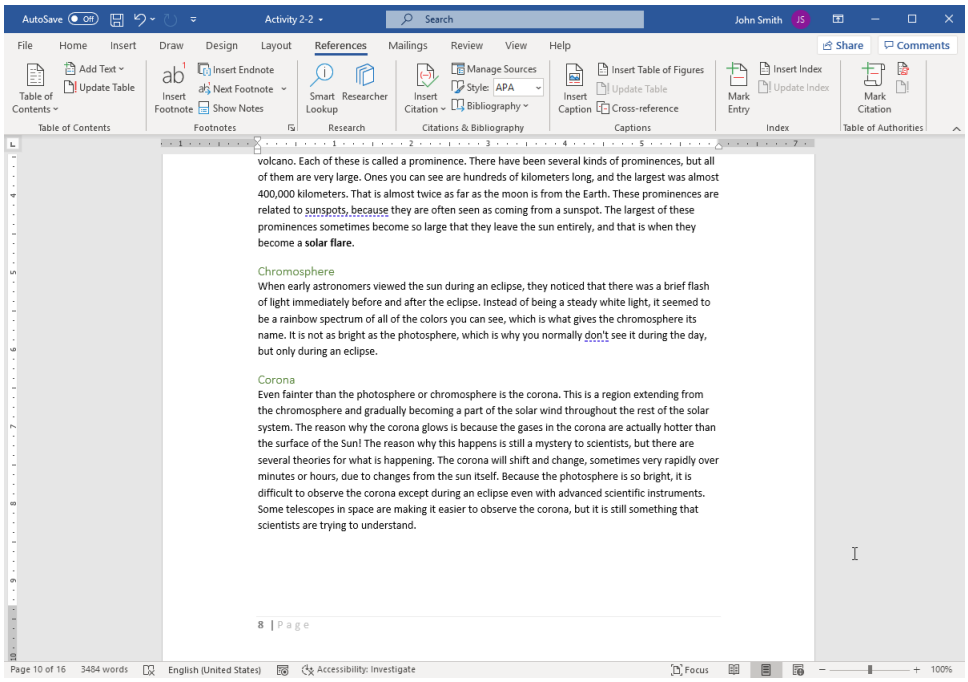
11. Click **Close** or click the **X** to close the Cross-reference dialog box:



12. Hold the Ctrl key and click the word “Corona” in the glossary:



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

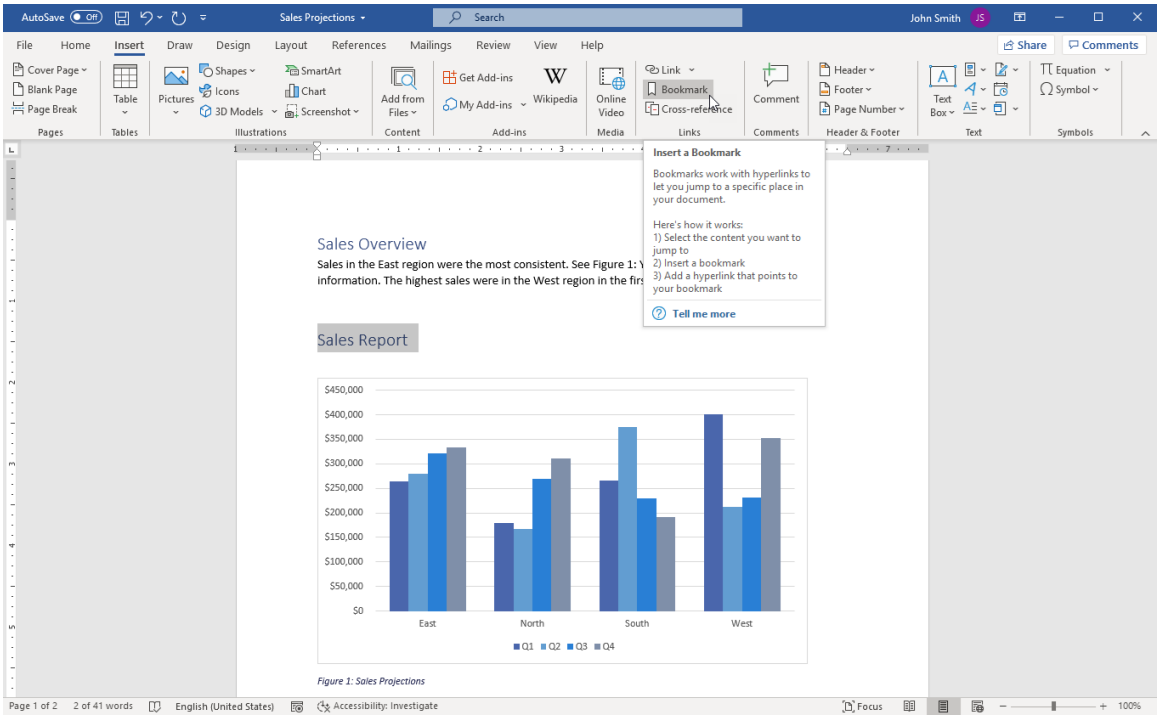
Bookmarks

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

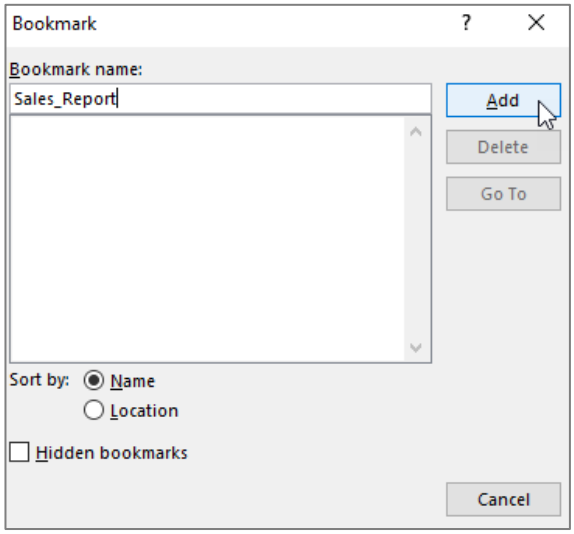
Adding Bookmarks

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 → Bookmark**:



Bookmark Dialog Box

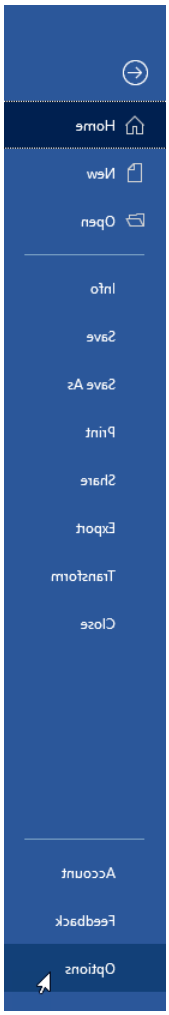
Once you click the Bookmark command, the Bookmark dialog box will open. Type a name for the bookmark and click **Add**:



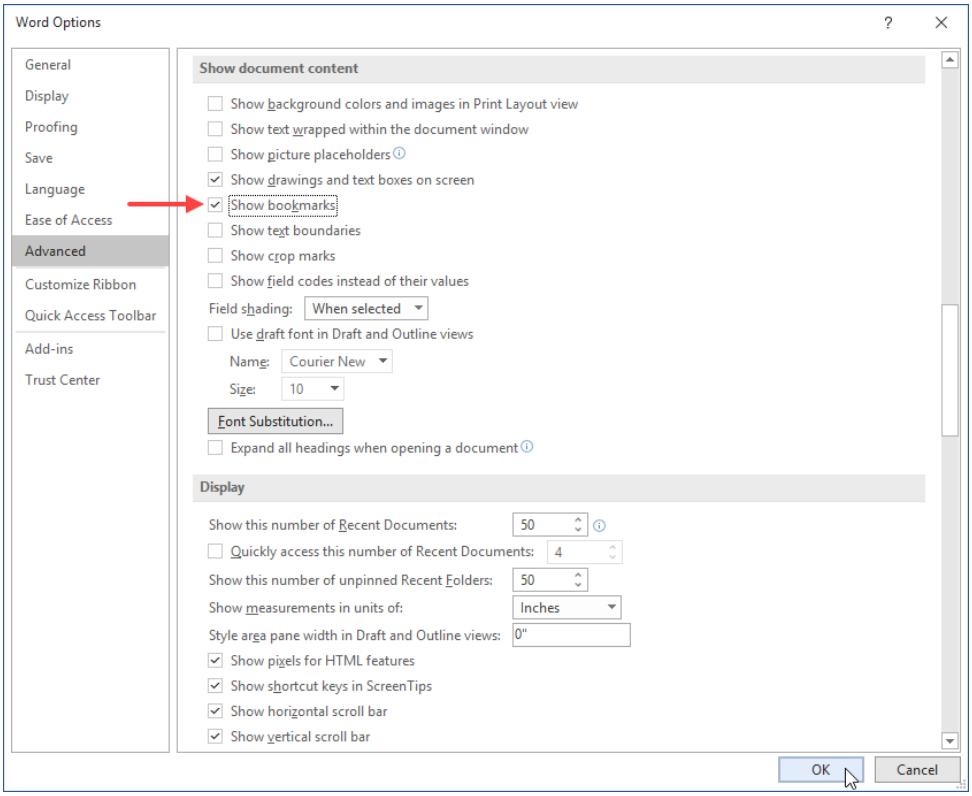
The bookmark will then be added to the document.

Bookmark 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 → Options**:



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



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

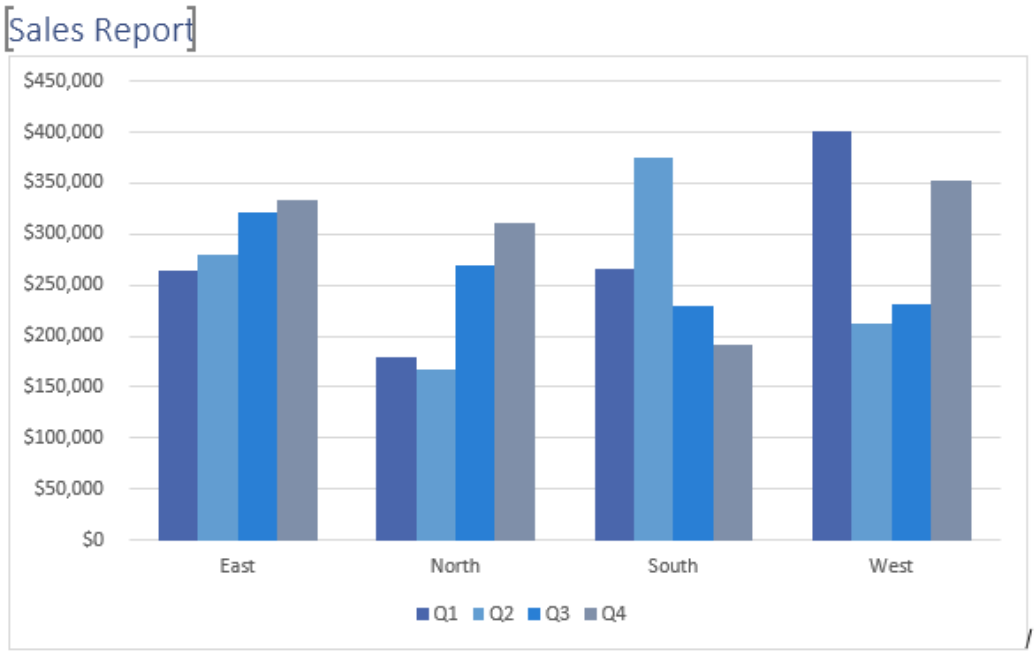
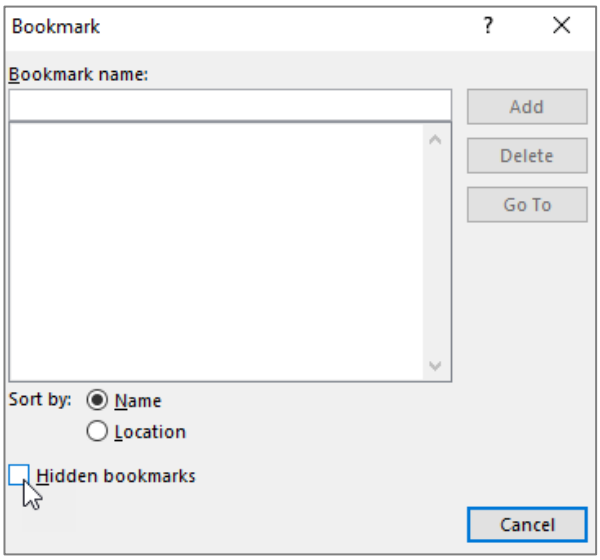


Figure 1: Sales Projections

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**:"



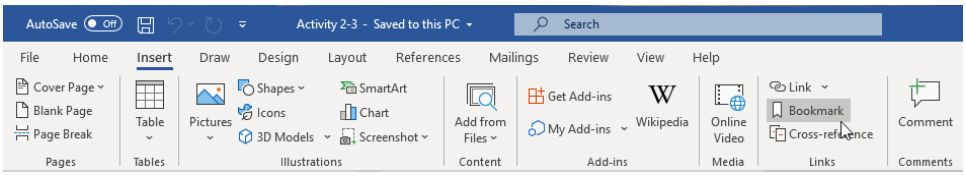
These bookmarks can be re-hidden at any time by unchecking this box.

Activity 2-3: Adding Bookmarks

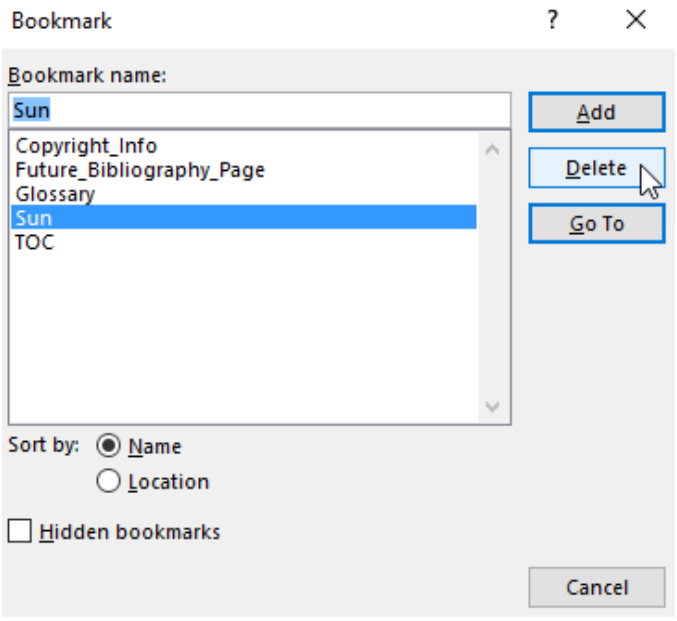
In this activity, you will review the bookmarks in the ham radio guide and add a few of your own. Note that when we refer to a page number, we are referring to the physical location of the page, not the formatted number that appears on the page.

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

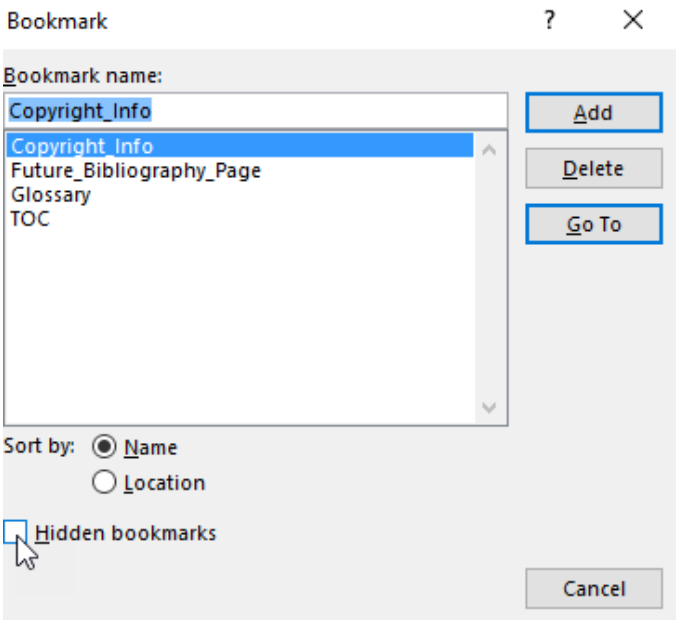
2. Let us see what bookmarks have been added to this document. Click **Insert → Bookmark**:



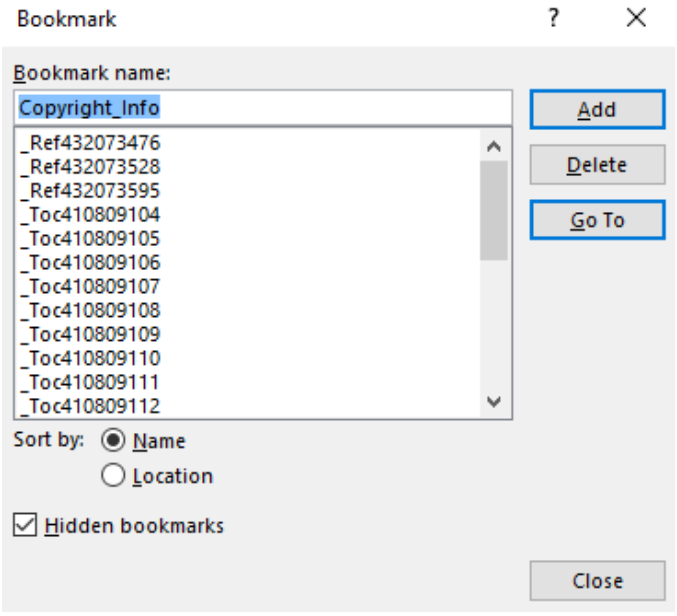
3. The Bookmark dialog box will open and show a list of the current bookmarks. The Sun bookmark seems a bit out of place. Click to select it and click **Delete**:



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

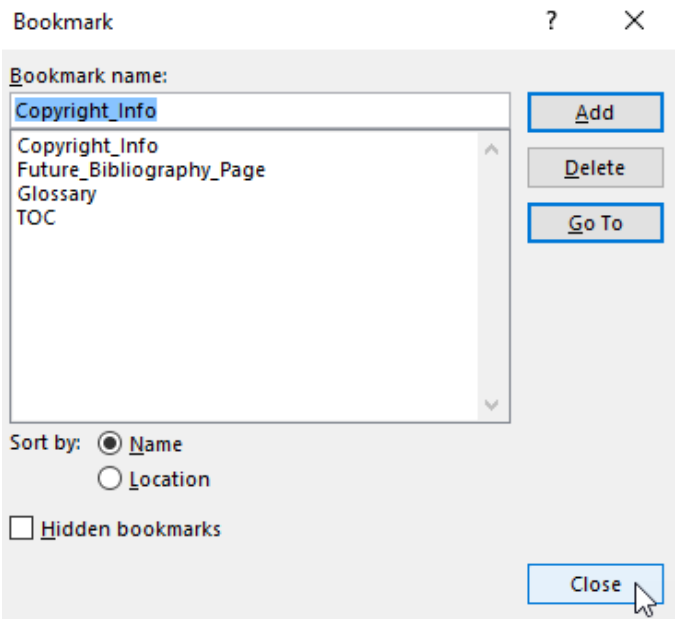


5. There are lots of hidden bookmarks in this document!

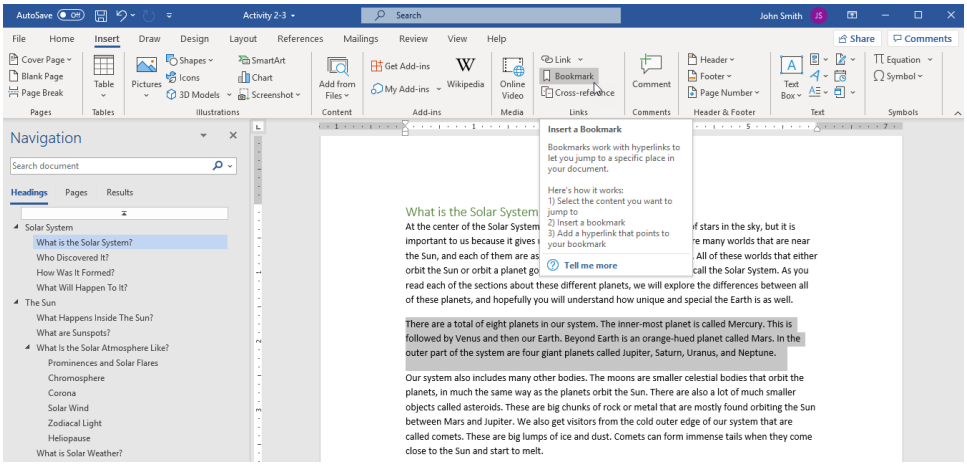


Hide them again by unchecking the "Hidden bookmarks" box.

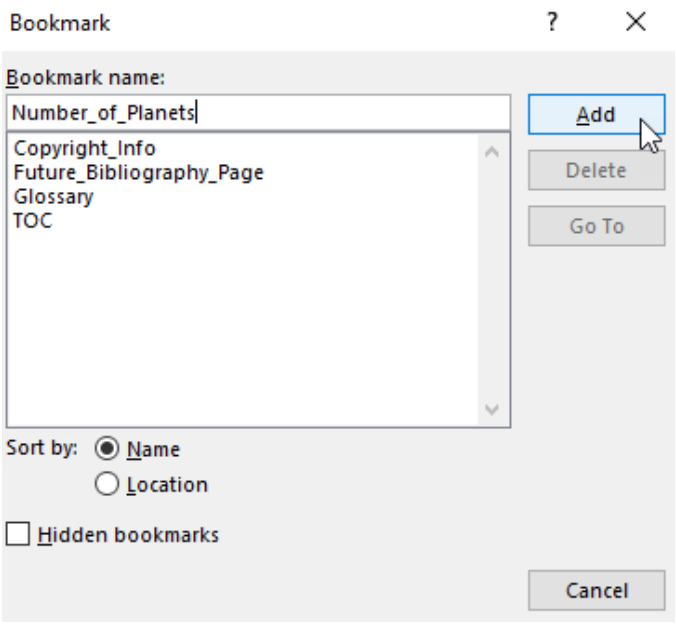
6. Let us add a few more bookmarks to this document to mark some key facts. Close the Bookmark dialog box:



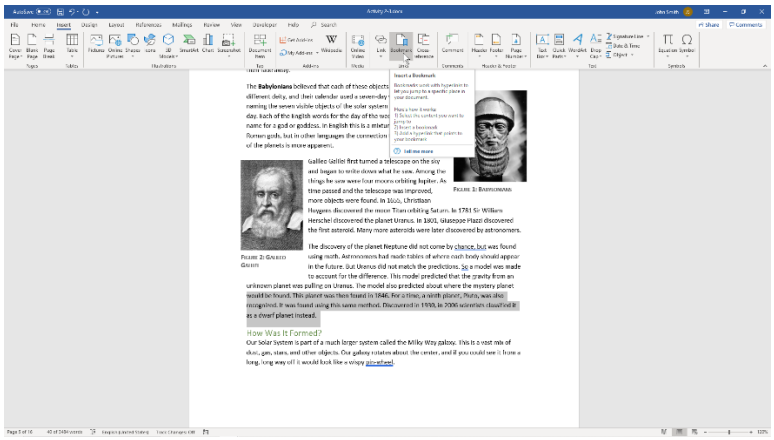
7. Scroll to the fourth page of the document. Select the second paragraph and click I**nsert → Bookmark**:



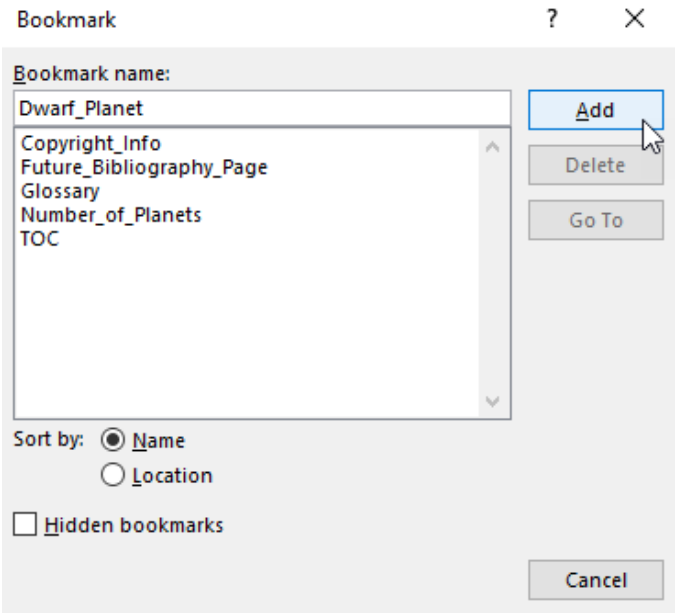
8. In the Bookmark dialog, type “Number_of_Planets” and click **Add**:



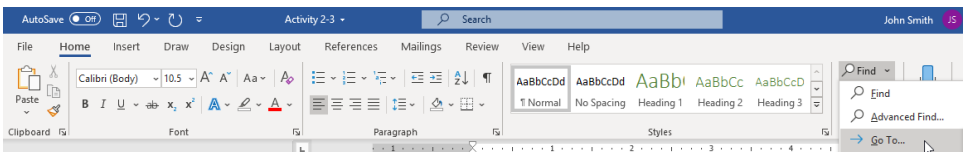
9. The Bookmark dialog box will close. Go to the next page of the document and select the last three sentences of the paragraph above the “How Was It Formed?” heading. Click **Insert → Bookmark**:



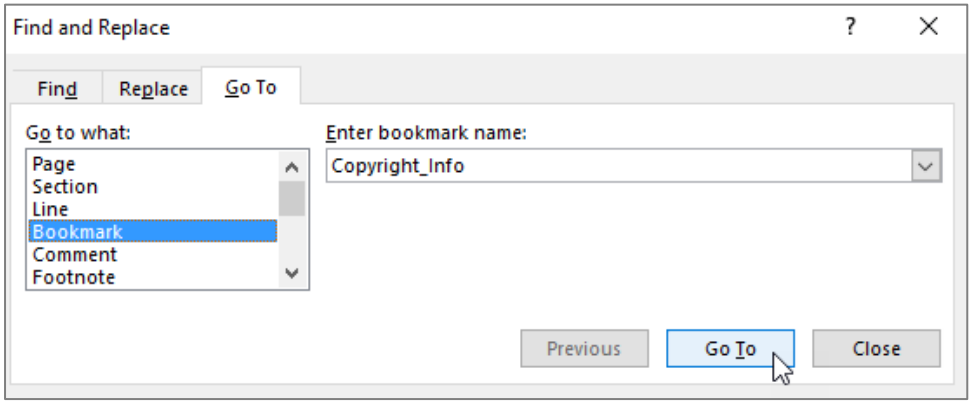
10. Type “Dwarf_Planet” and click **Add**:



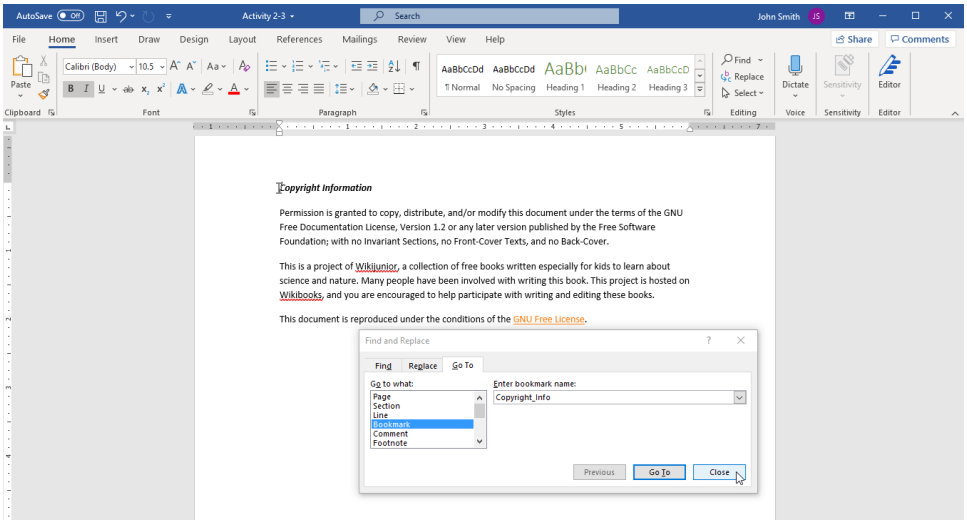
11. The Bookmark dialog box will close. Let us test out one of the bookmarks. Click **Home → Find drop-down arrow → Go To**:



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**:



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



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:

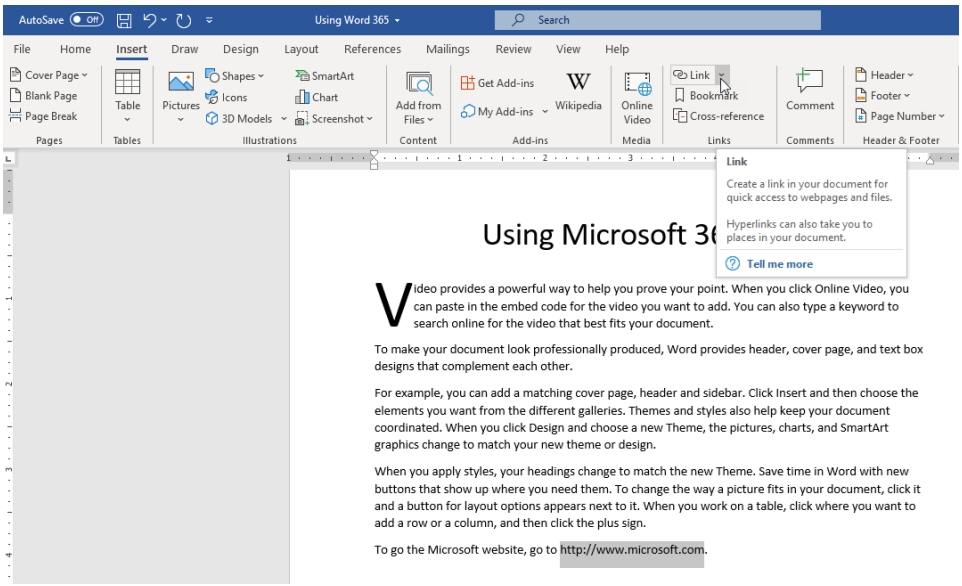
- About hyperlinks
- How to add hyperlinks to a document
- How to use the Insert Hyperlink dialog box
- About the options in the Link To panel of the Hyperlink dialog box
- How to use the Edit Hyperlink dialog box

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.

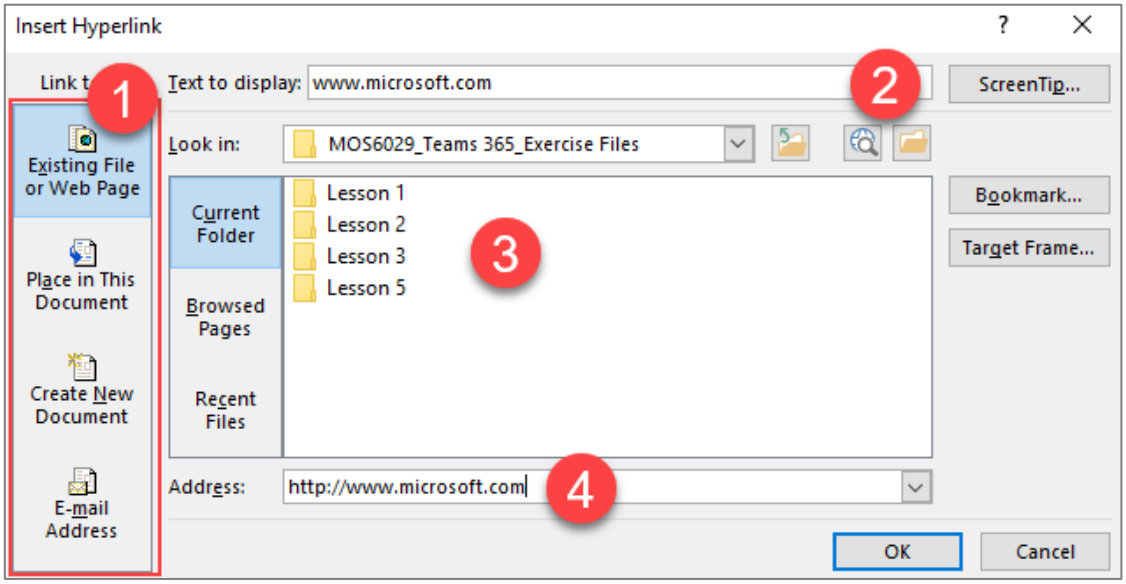
Adding Hyperlinks

If you type a web address (such as http://www.microsoft.com), 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 → Link**:



Insert Hyperlink Dialog Box

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



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.)

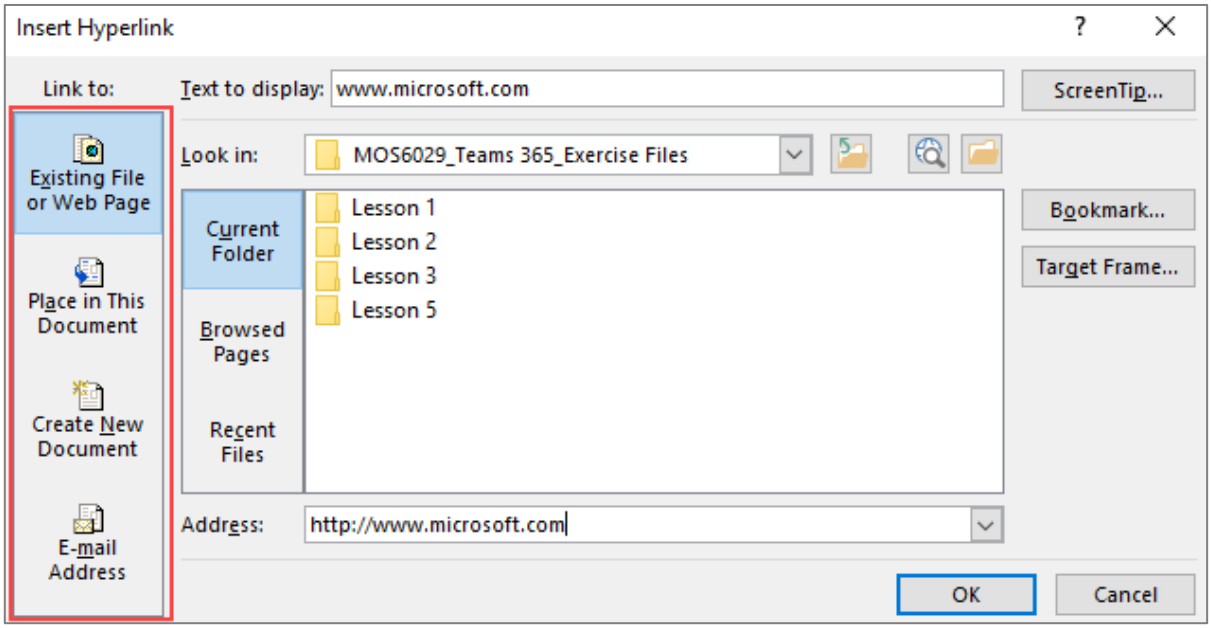
With this option, you will see the settings shown above. At the top of the dialog box, you can set the **text to display (2)**. This is the text that will turn blue and will contain the actual link. (By default, any text you have selected will appear in this field, but you can modify it if you wish.)

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:

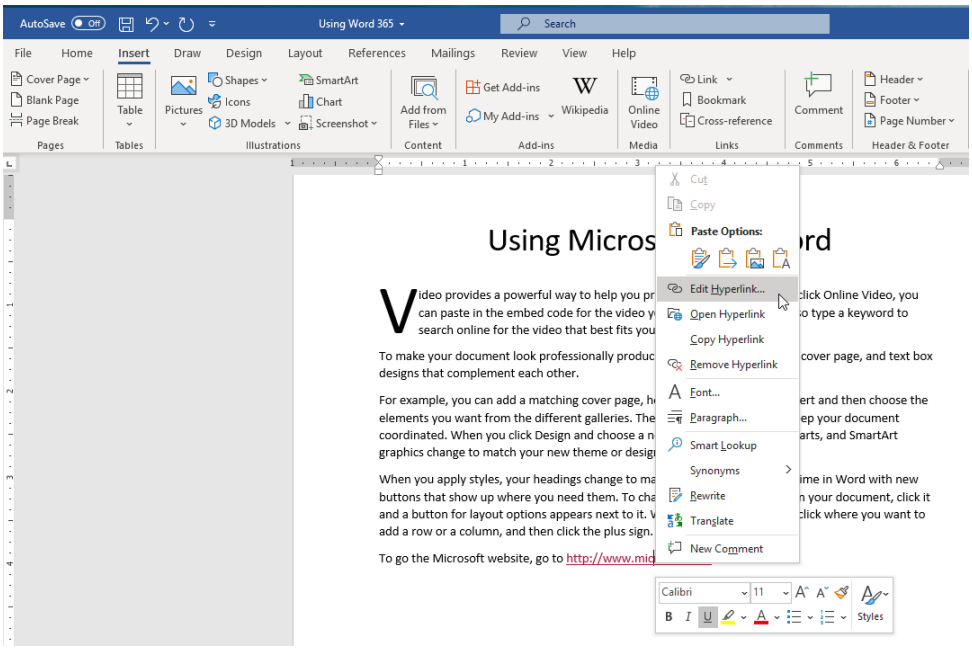


Let us explore the options.

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.

Edit Hyperlink Dialog Box

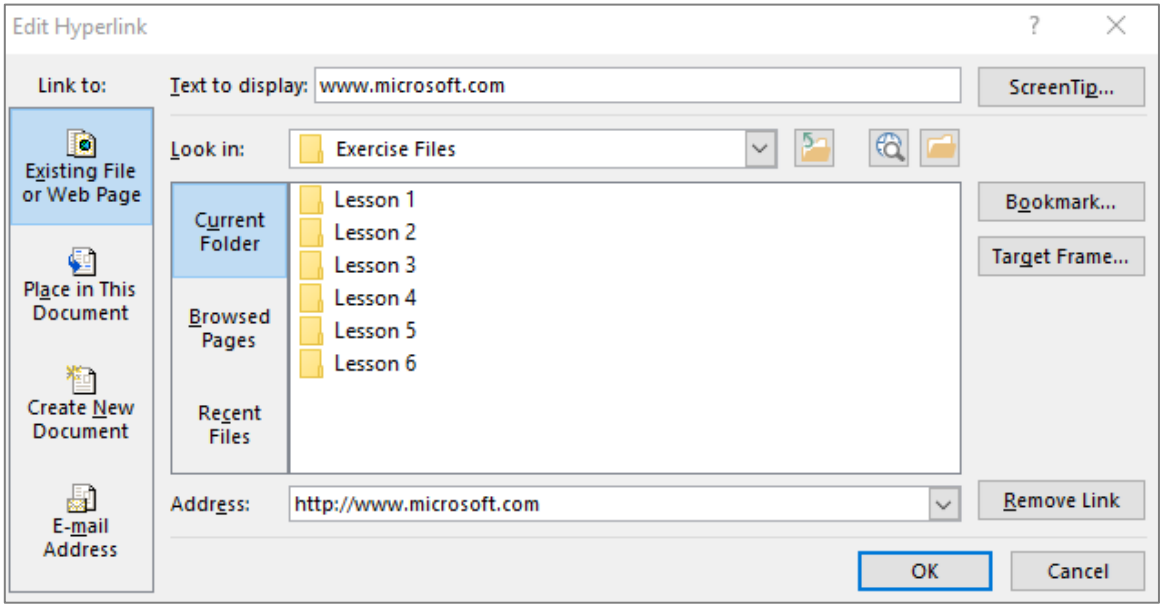
After you have inserted a hyperlink, the easiest way to edit it is using the right-click menu:



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:



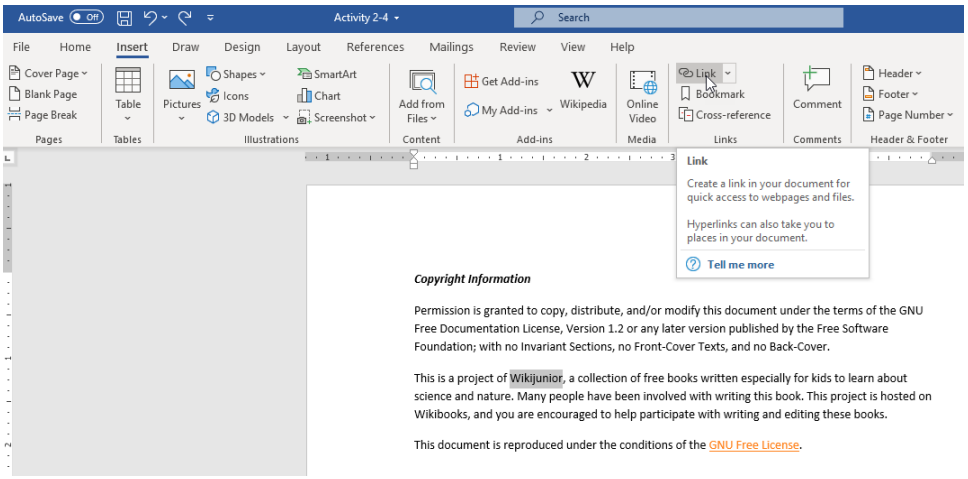
There is also a **Remove Link** button just above the OK and Cancel buttons that allows you to remove the link from the text, just like the Remove Hyperlink command in the right-click menu.

Activity 2-4: Adding Hyperlinks

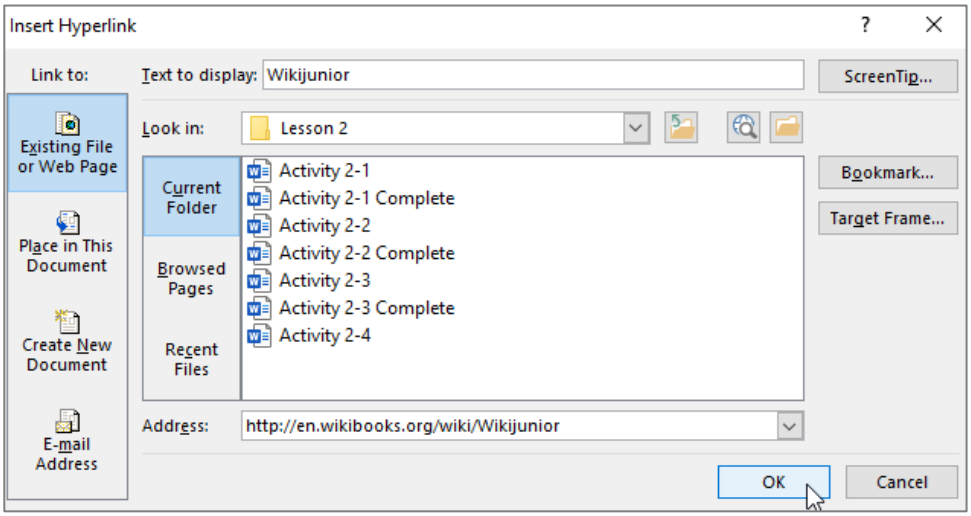
In this activity, you will view, create, and modify hyperlinks in a document. Note that when we refer to a page number, we are referring to the physical location of the page, not the formatted number that appears on the page.

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

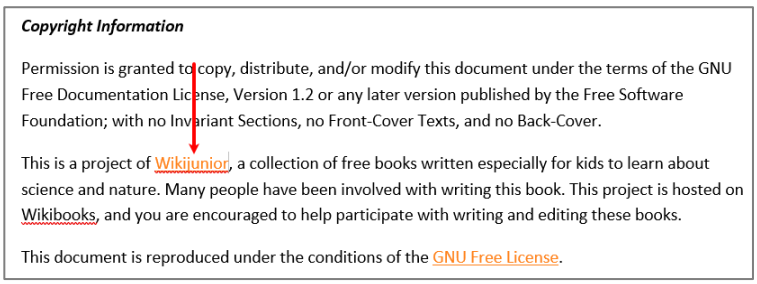
2. Let us add a hyperlink to the Wikijunior page. Select this word on the first page of the document and click **Insert → Link**:



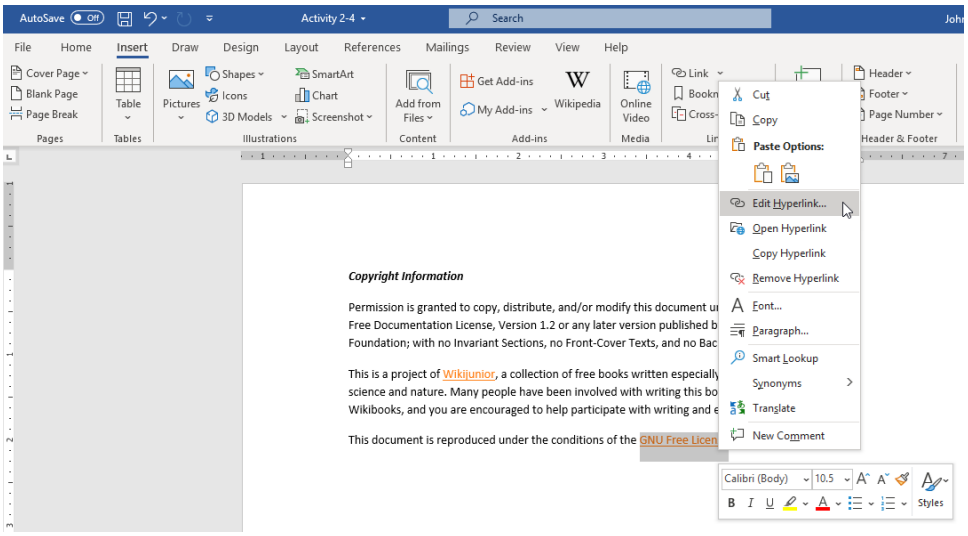
3. The Insert Hyperlink dialog box will open. Ensure that the correct text ("Wikijunior") is displayed in the field at the top of the dialog box. Type "**http://en.wikibooks.org/wiki/Wikijunior**" in the Address field (without the quotation marks). Click **OK**:



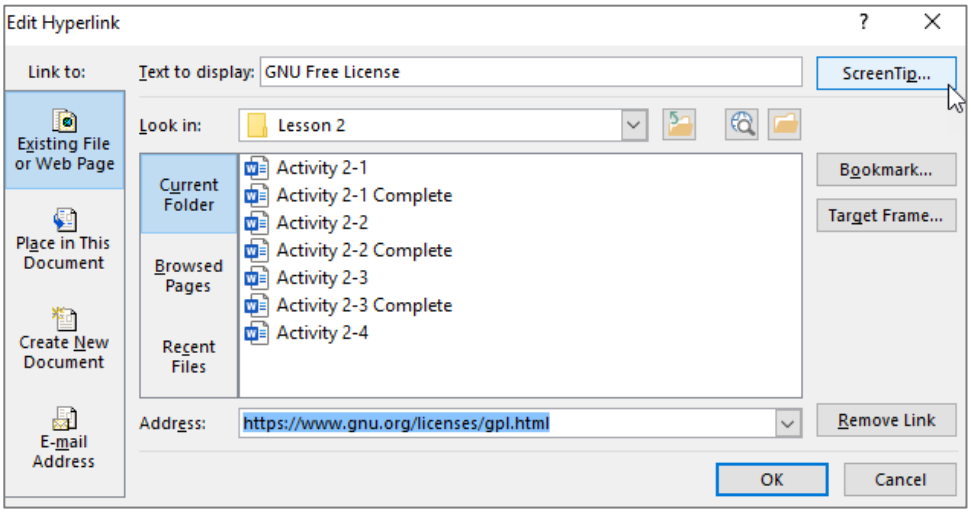
4. The hyperlink will now be created:



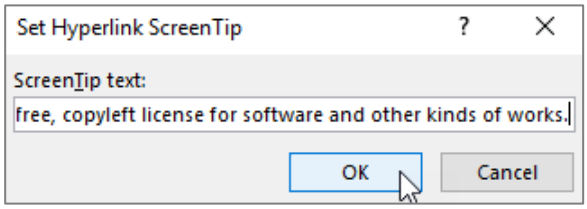
5. Right-click the existing hyperlink at the end of this page. Click **Edit Hyperlink**:



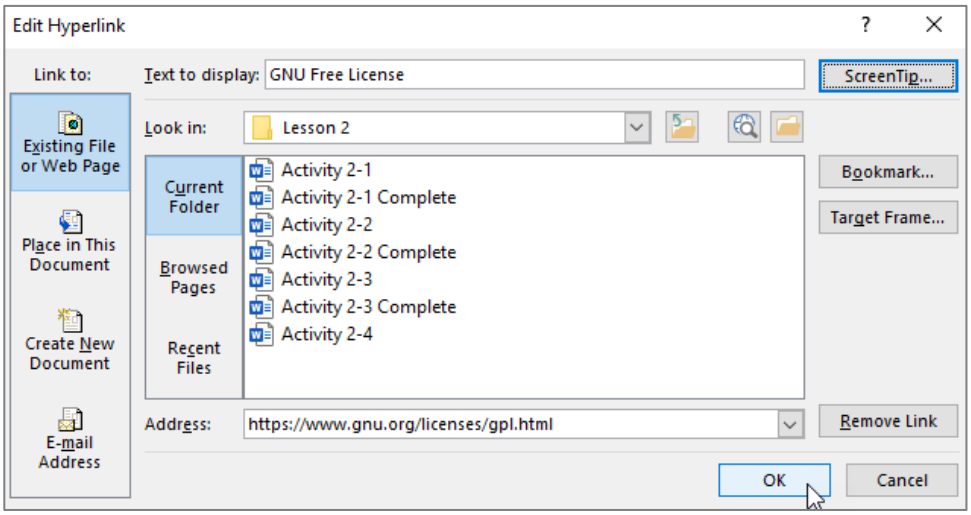
6. The Edit Hyperlink dialog box will open. Click the **ScreenTip** button:



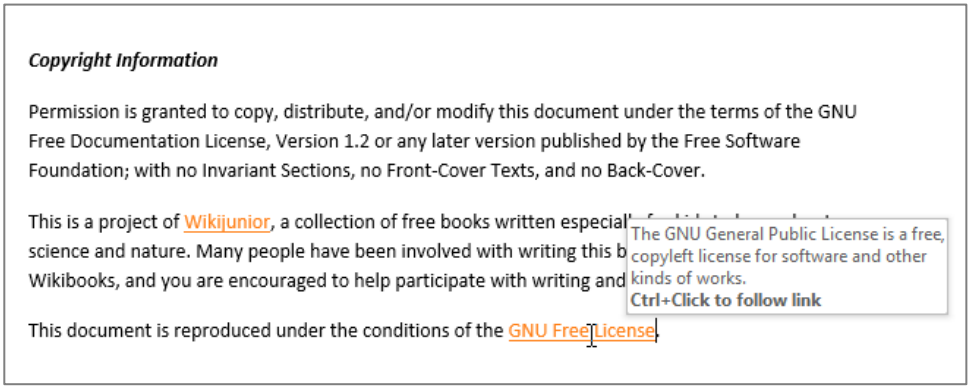
7. The Set Hyperlink ScreenTip dialog box will open. Type the following text (without the quotation marks): "**The GNU General Public License is a free, copyleft license for software and other kinds of works.**" Click **OK**:



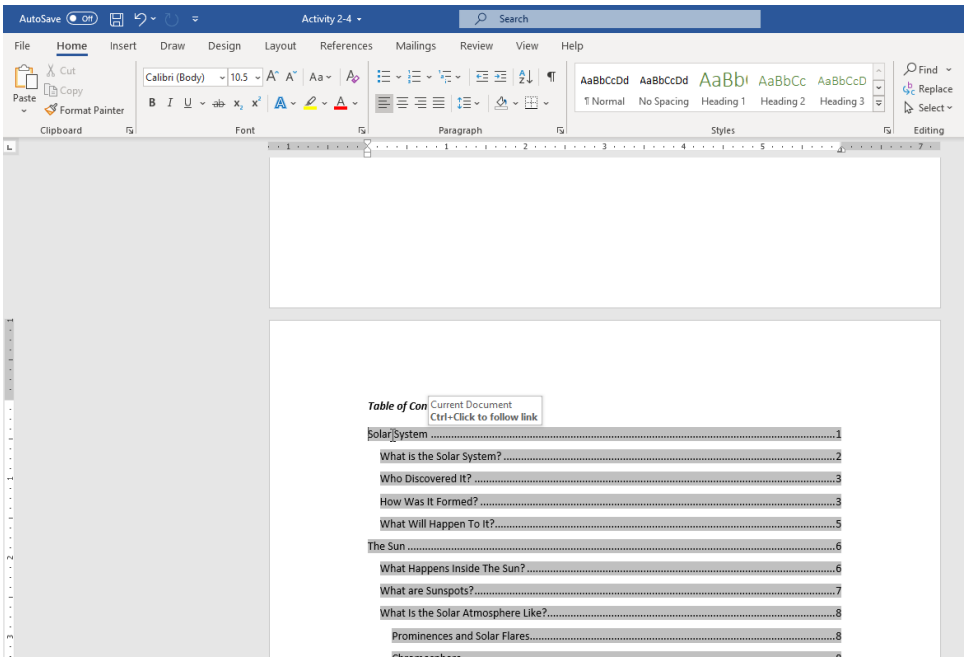
8. Click **OK** in the Edit Hyperlink dialog box:



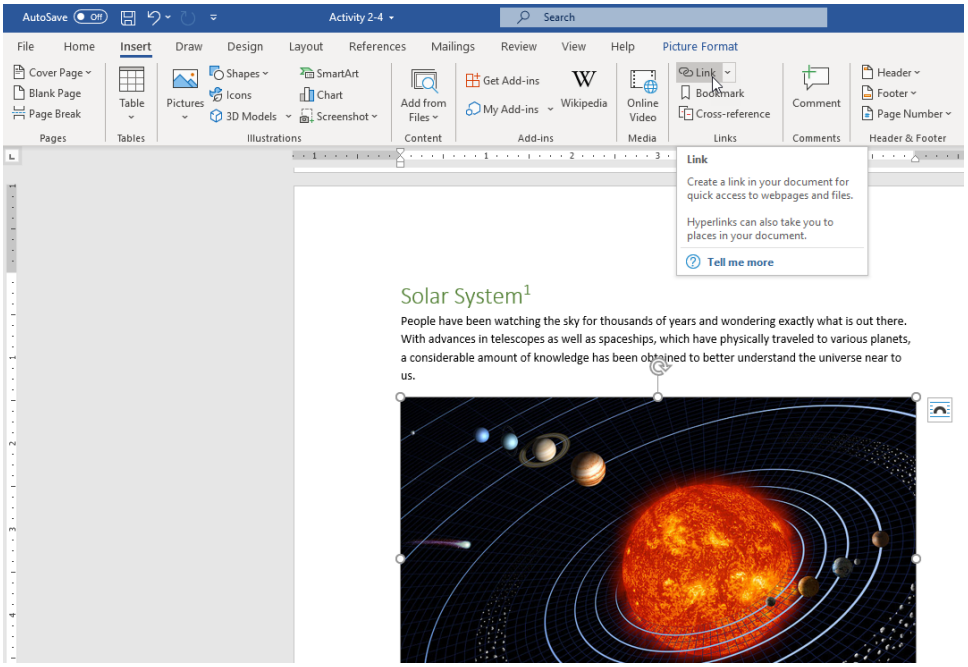
9. The ScreenTip will now be created. Move your mouse over the link to test it:



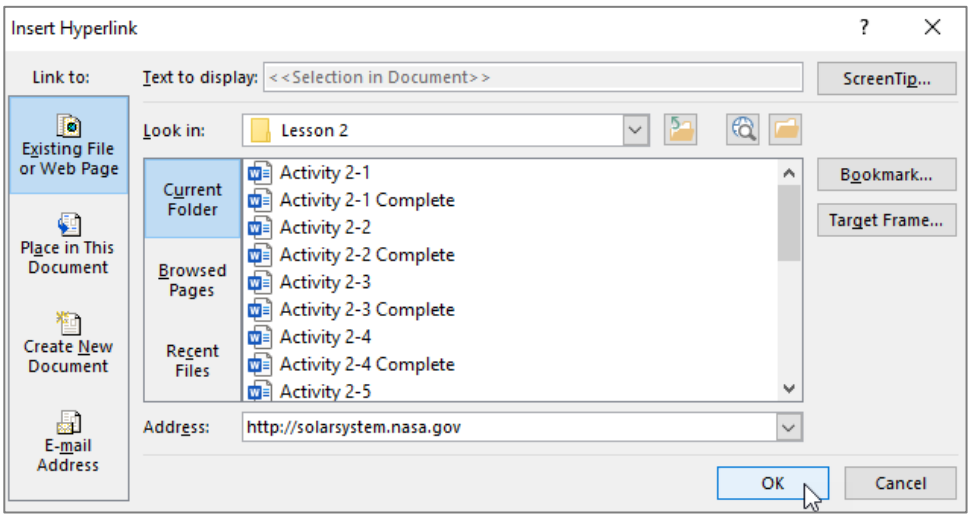
10. Go to the next page in the document. Move your mouse over the “Solar System” heading in the Table of Contents. Notice that it is a hyperlink to a place in the current document. **Hold the Ctrl key and click this link** to navigate to that section:



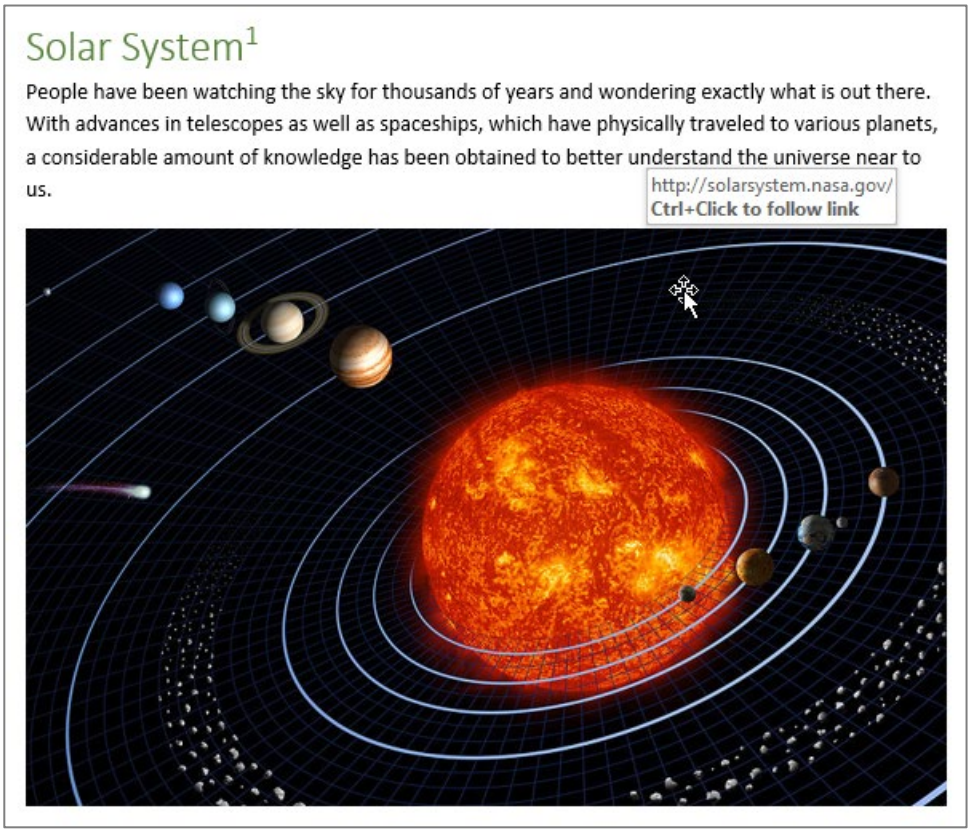
11. Let us add a hyperlink to the image on this page. Select the picture and click **Insert → Link**:



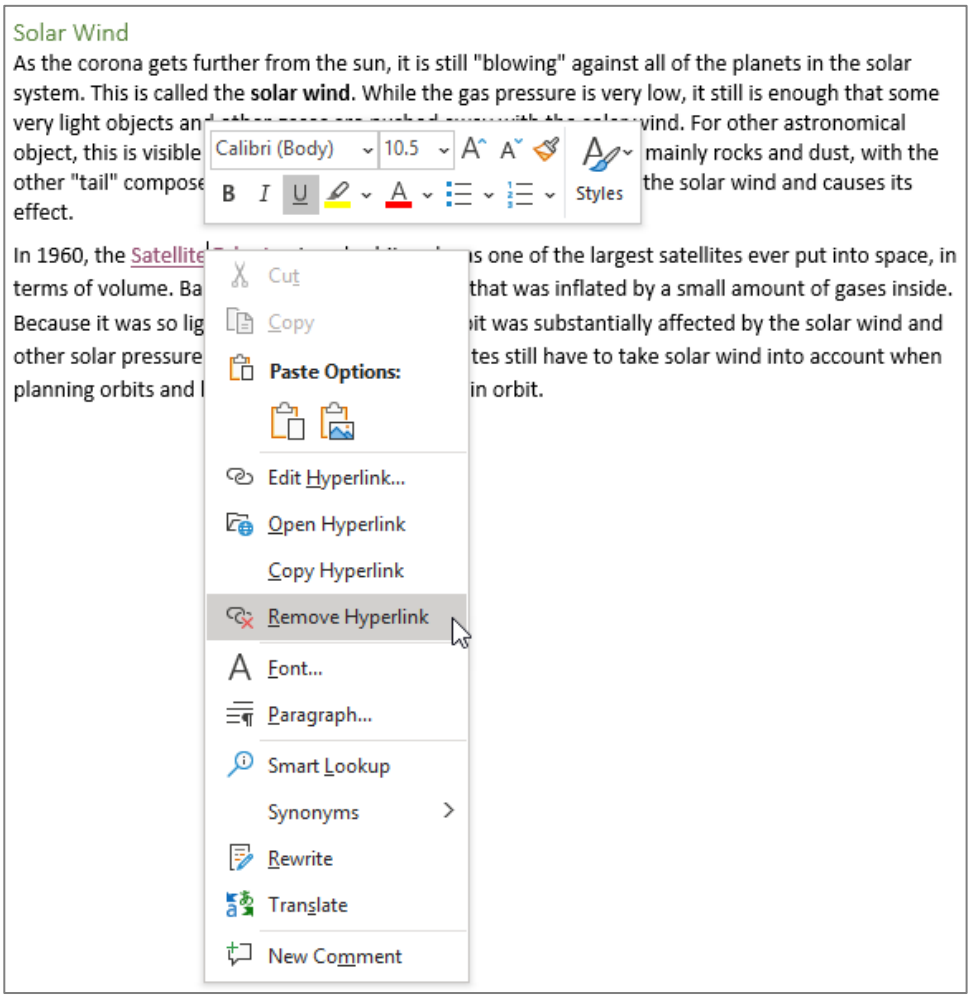
12. In the Insert Hyperlink dialog box, type "**http://solarsystem.nasa.gov**" (without the quotation marks) in the Address field. Click **OK**:



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:

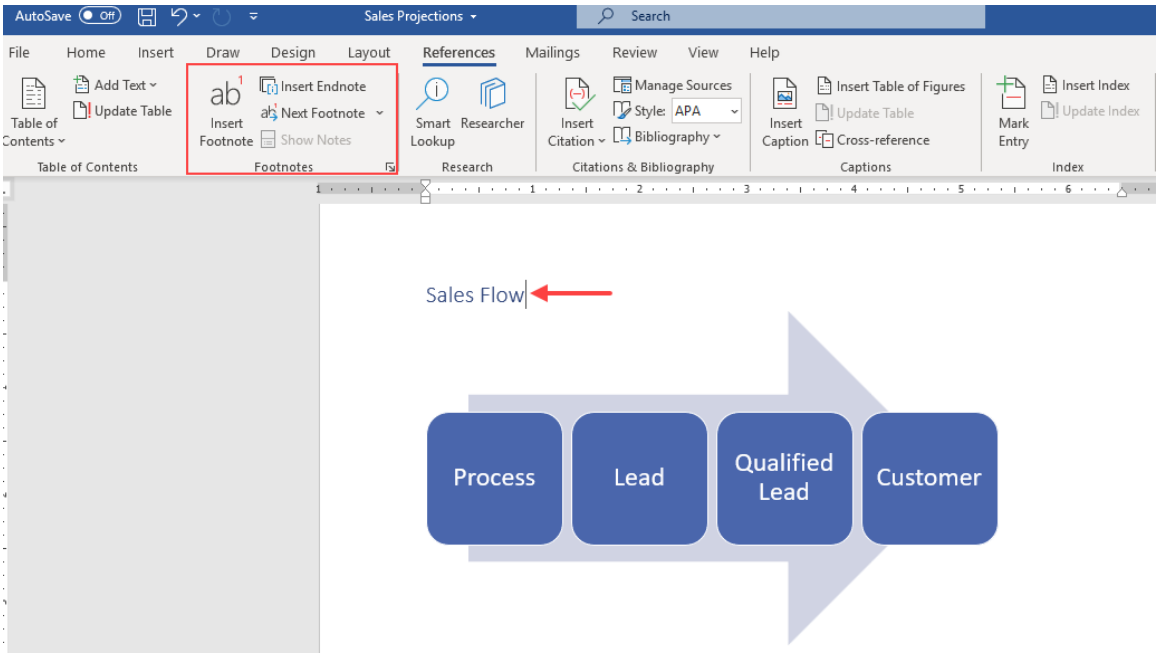
- About footnotes and endnotes
- How to insert footnotes and endnotes
- How to use the Footnote and Endnote dialog box
- How to navigate through footnotes and endnotes
- About ScreenTips for footnotes and endnotes

Footnotes and Endnotes

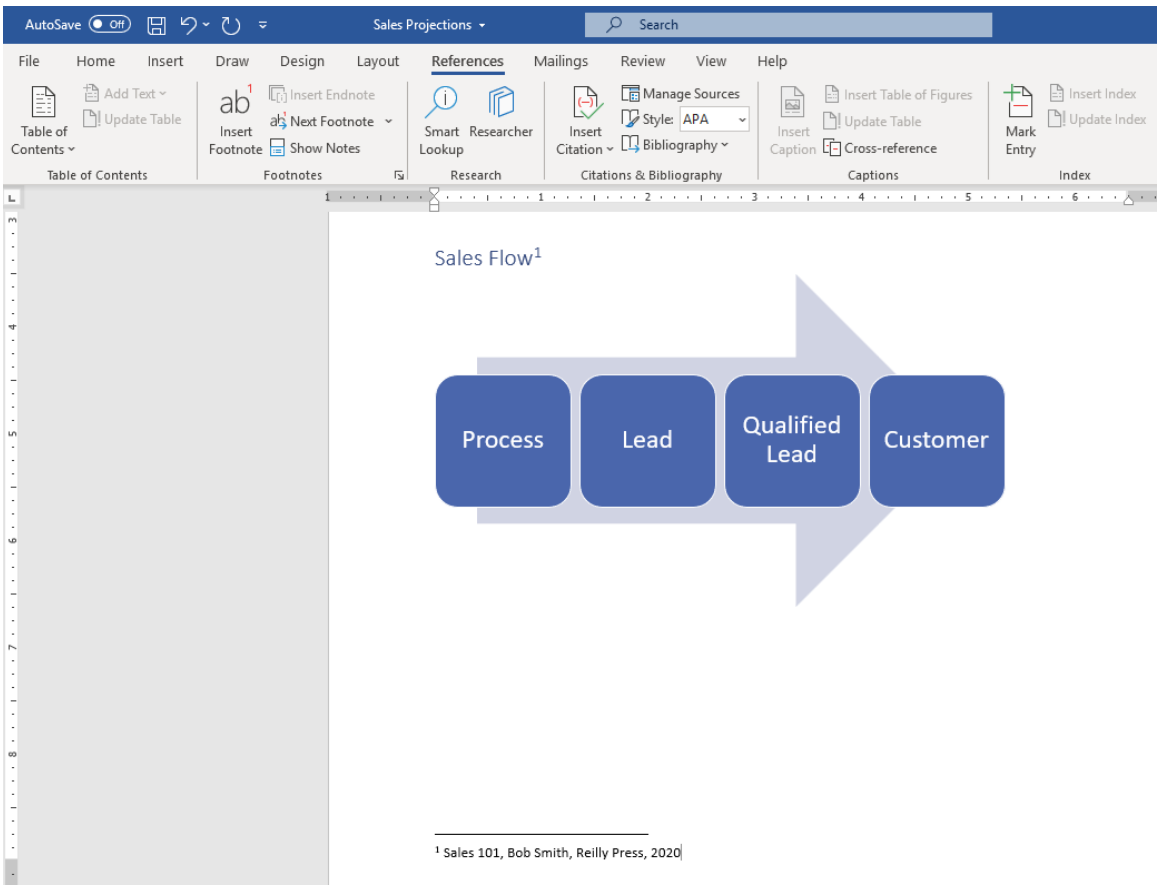
Footnotes and endnotes provide a structured way to add source information or notes to a document. With a **footnote**, a number is placed to refer the reader to a note at the end of the current page. **Endnotes** are similar, except that they refer the reader to the end of the current section or the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

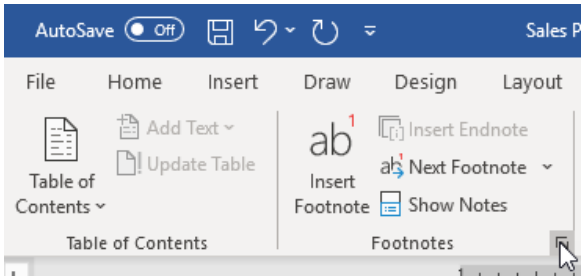


A number will be inserted at the cursor's location and you will be taken to the location of the note so that you can type in the information:

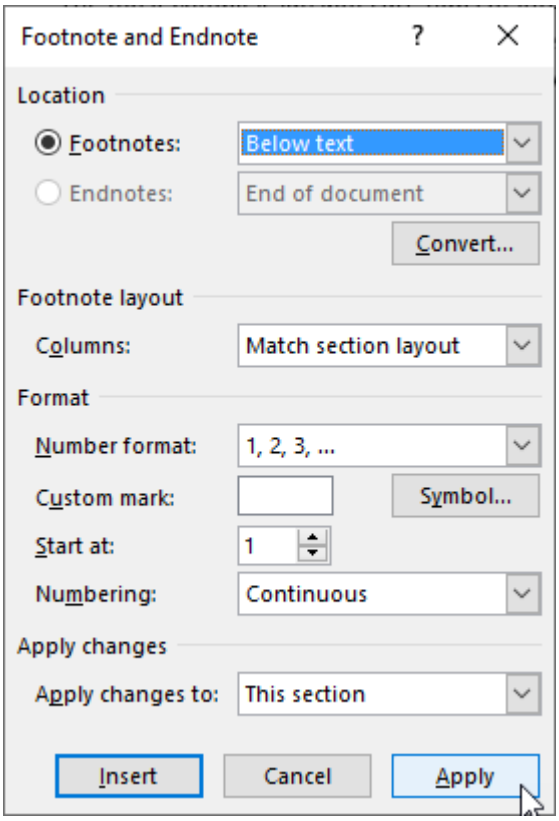


The Footnote and Endnote Dialog Box

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



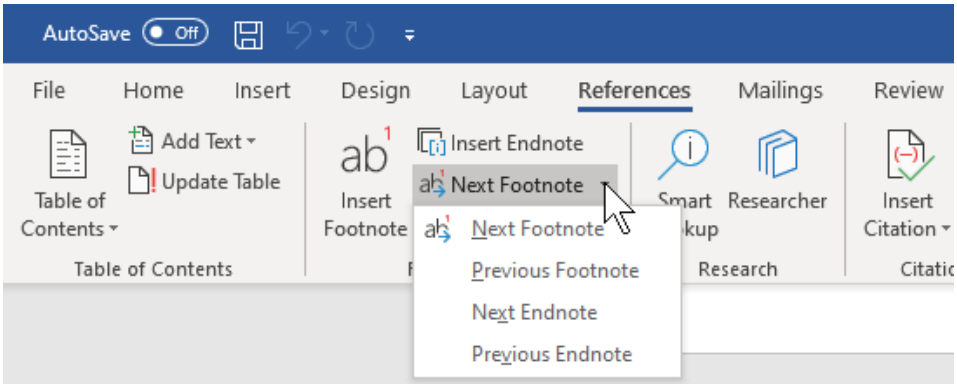
This will open the **Footnote and Endnote** dialog box:



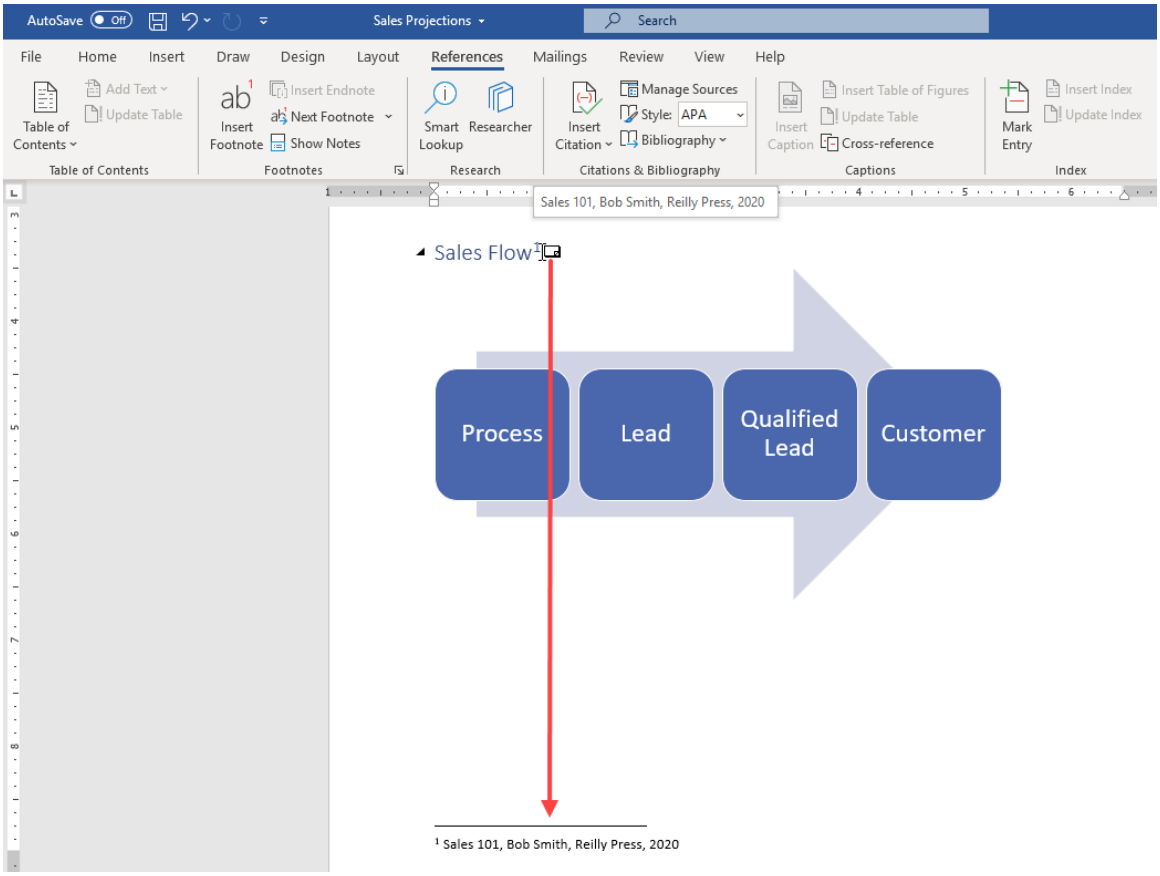
Here you can change the location and format of the document's footnotes and endnotes. Also note the menu at the bottom of the dialog box that allows you to choose what section of the document to apply the changes to. Click **Apply** when you are finished changing your settings. (Notice that you can manually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

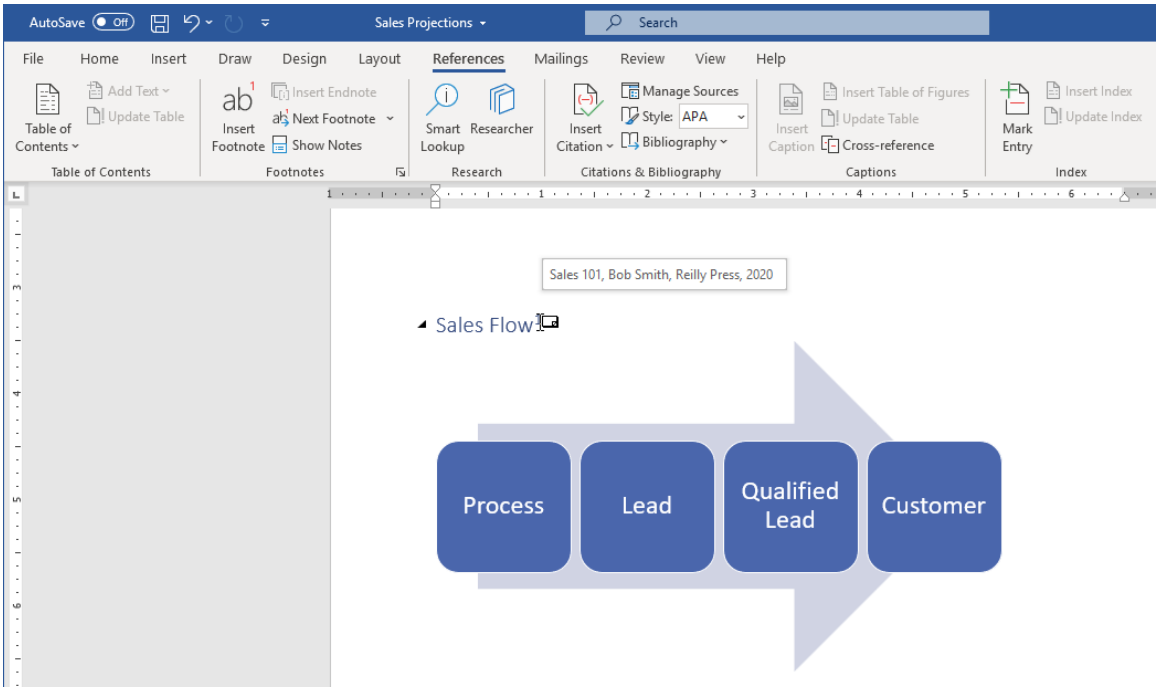


You can also double-click the footnote or endnote number itself to go to that note:



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:

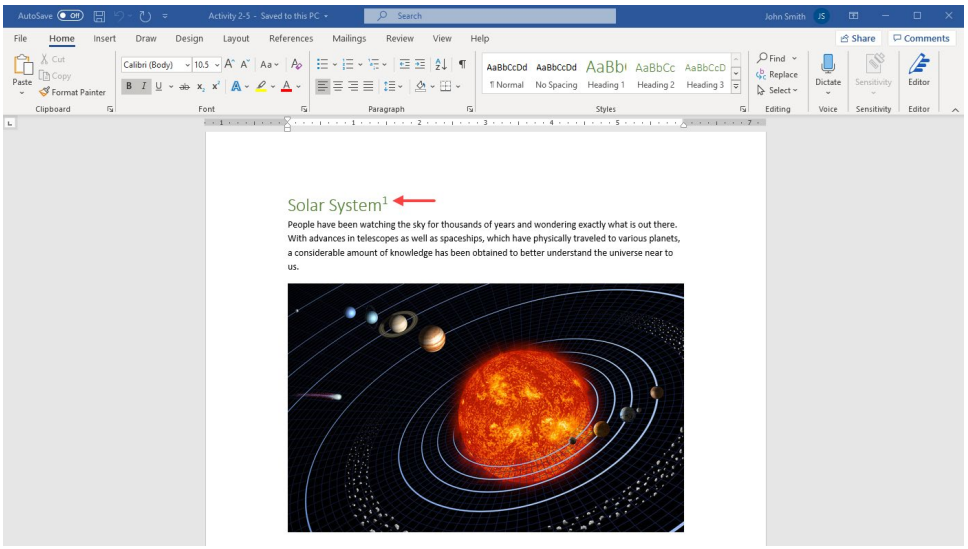


Activity 2-5: Inserting Footnotes and Endnotes

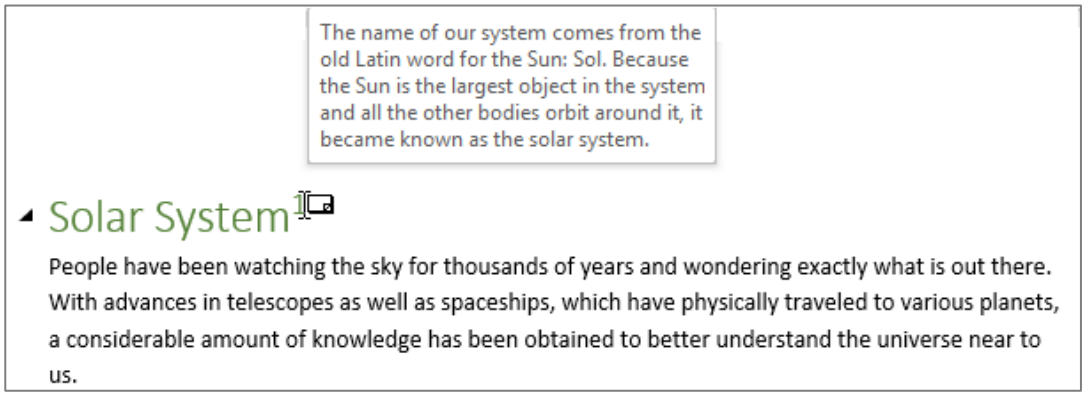
In this activity, you will view, add, and modify footnotes. Note that when we refer to a page number, we are referring to the physical location of the page, not the formatted number that appears on the page.

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

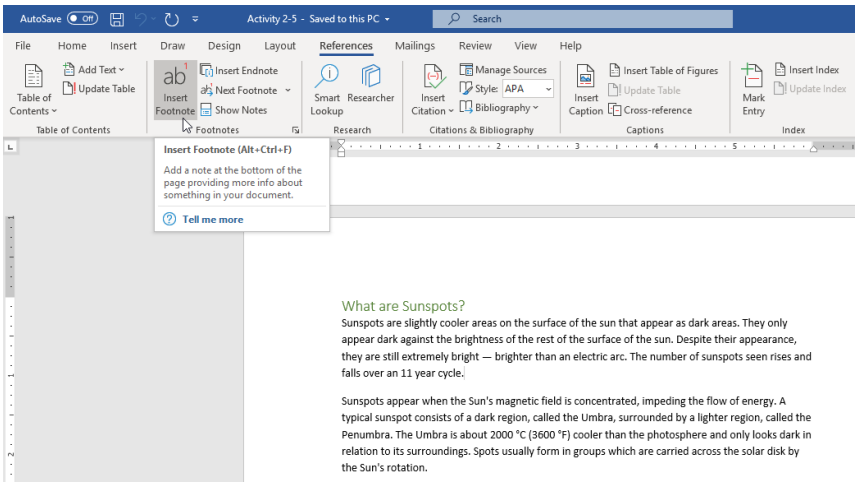
2. Go to the third page of the document. Notice that there is a number by the Solar System heading:



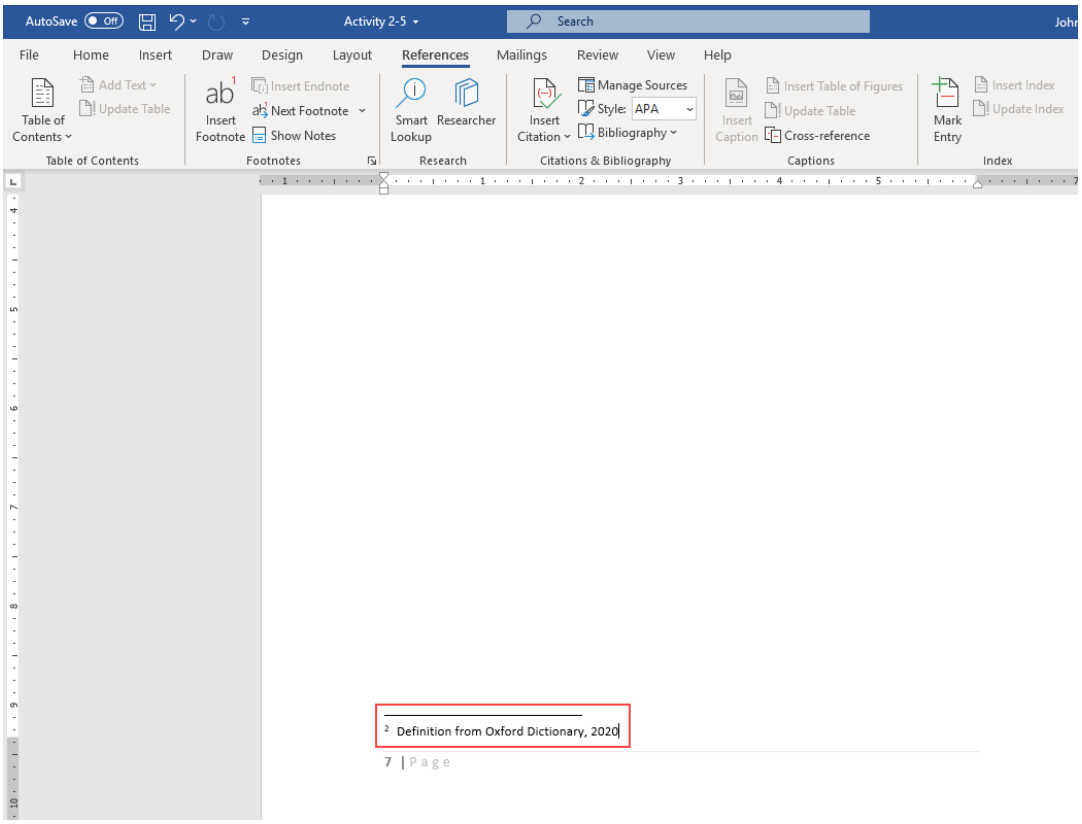
3. Move your mouse over this number to see the note attached to it:



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**:

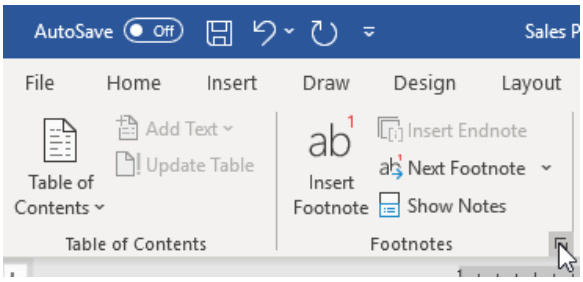


5. The number will be added and you will be taken to the footnote section. Type "Definition from Oxford Dictionary, 2020" (without the quotation marks):

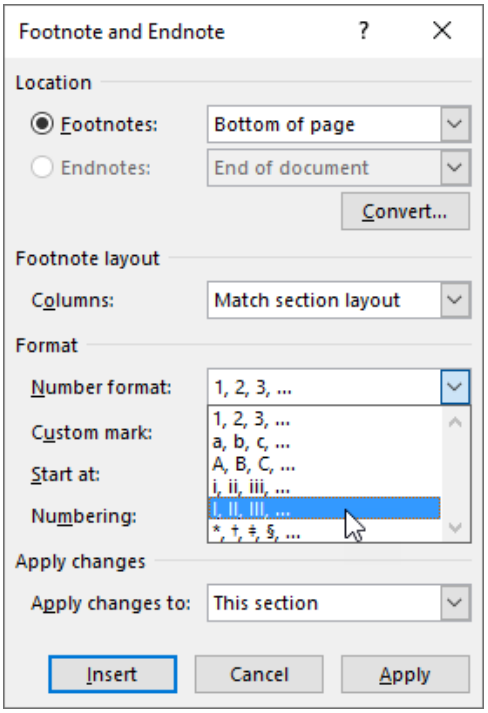


Notice how this endnote is numbered "2" since it is the second one in the document.

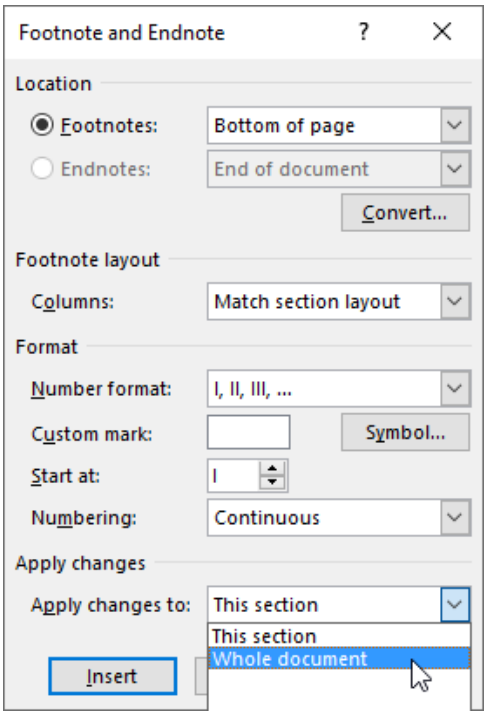
6. Let us modify the format of the footnotes in this document. Click the **Footnotes and Endnotes** option button in the Footnotes group of the References tab:



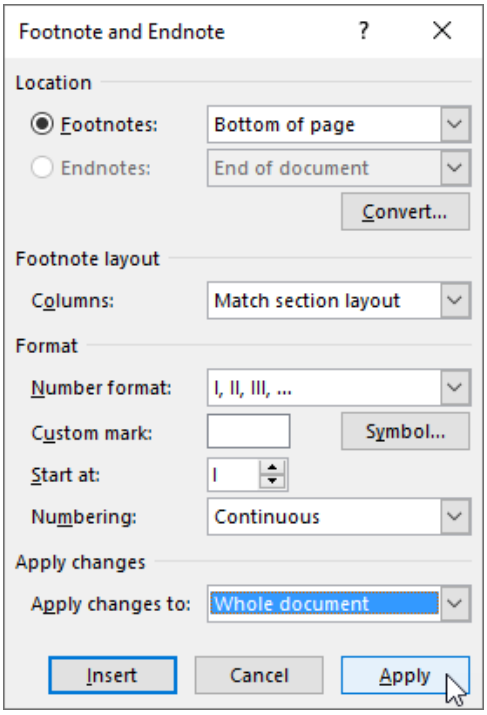
7. The Footnote and Endnote dialog box will open. Click the "Number format" menu and choose uppercase Roman numerals:



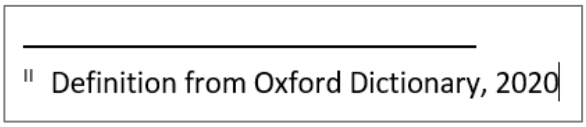
8. Click the "**Apply changes to**" menu and click "**Whole document**:"



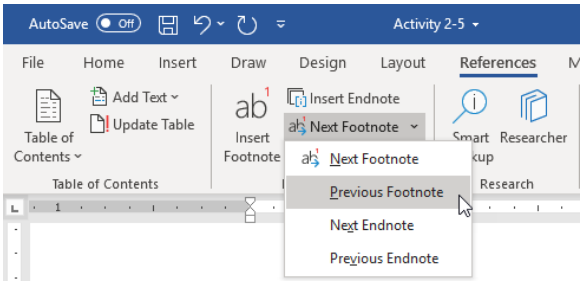
9. Click **Apply**:



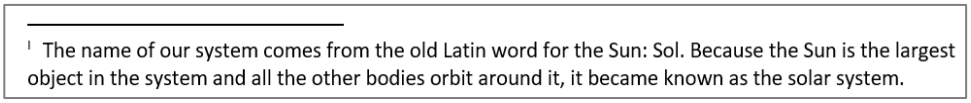
10. The Footnote and Endnote dialog box will close. You will see the formatting of the second footnote change:



11. 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:



(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

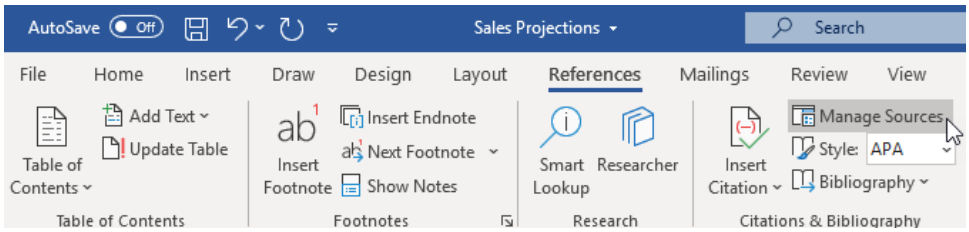
Sources

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.

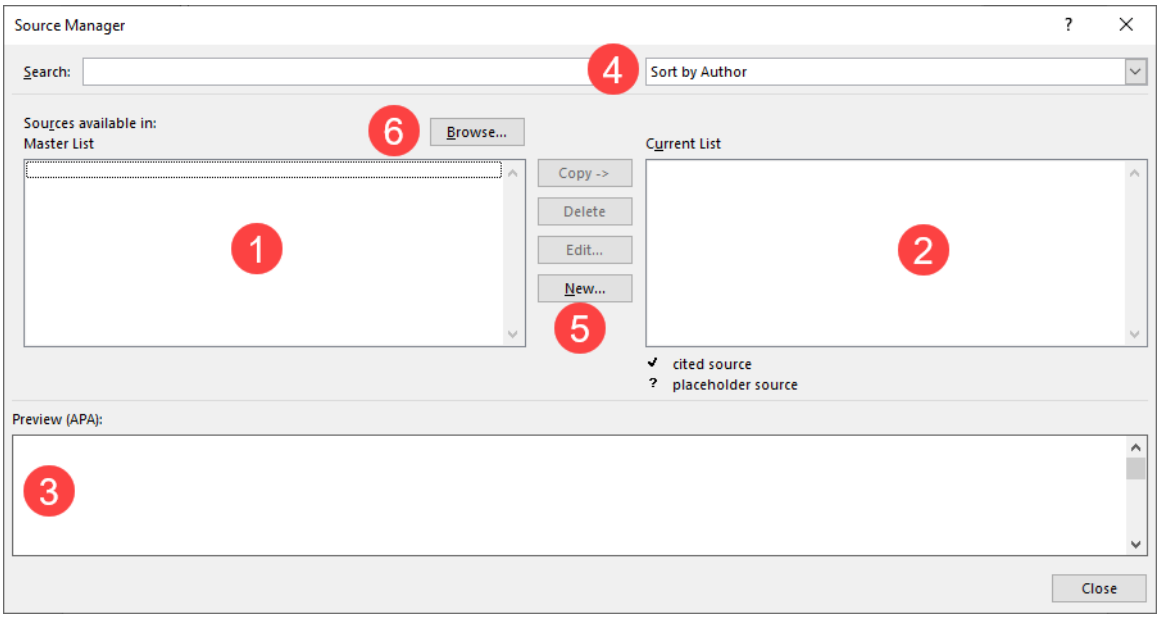
The Source Manager Dialog Box

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:



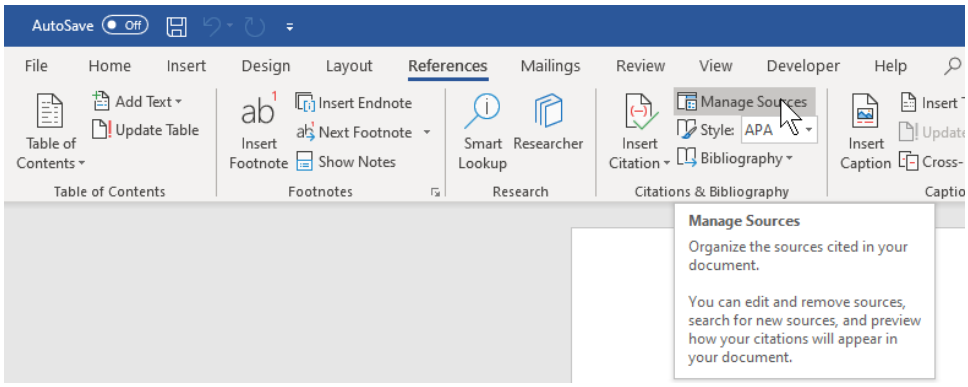
Let us go over the parts of the dialog box.

- 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)**.

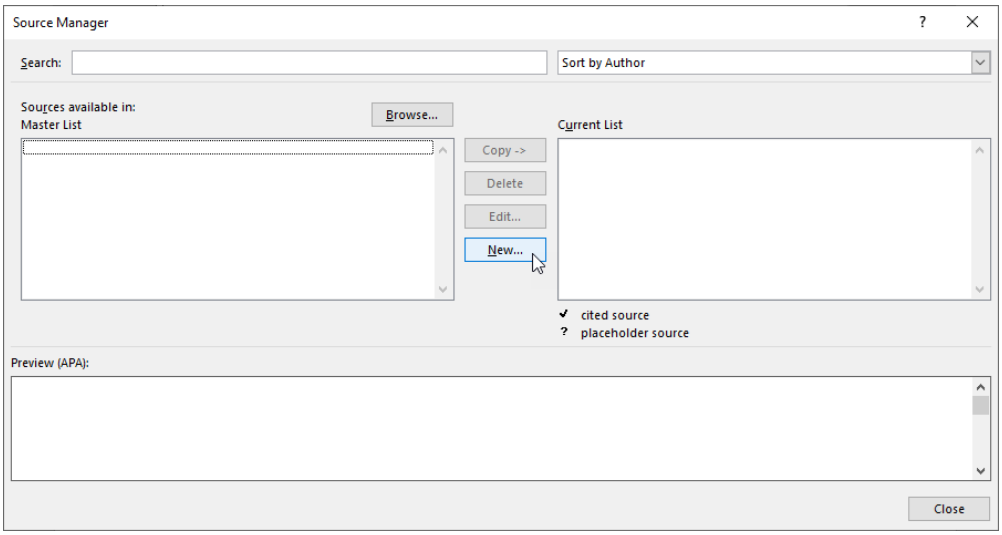
Once you are done with the Source Manager, click Close to return to your document.

The Create Source Dialog Box

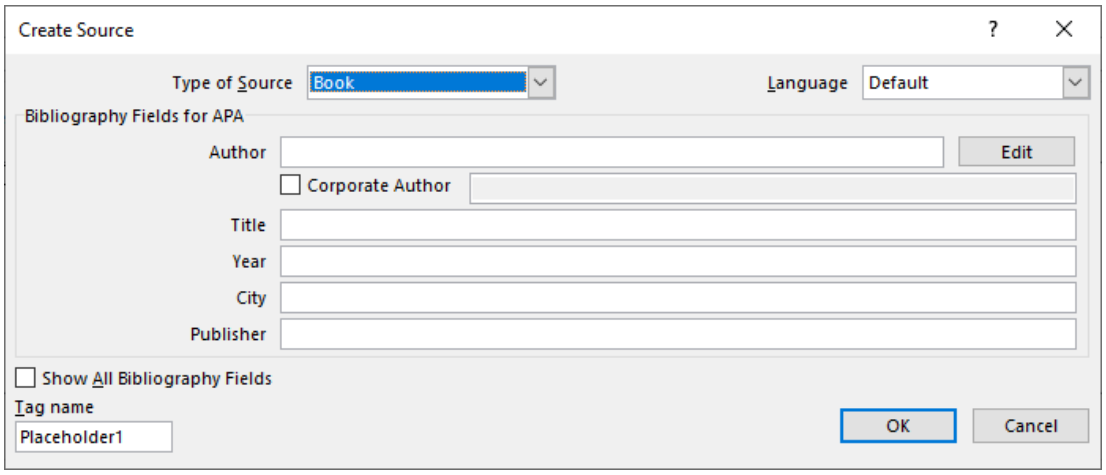
To add a new source to your document, click References → Manage Sources:



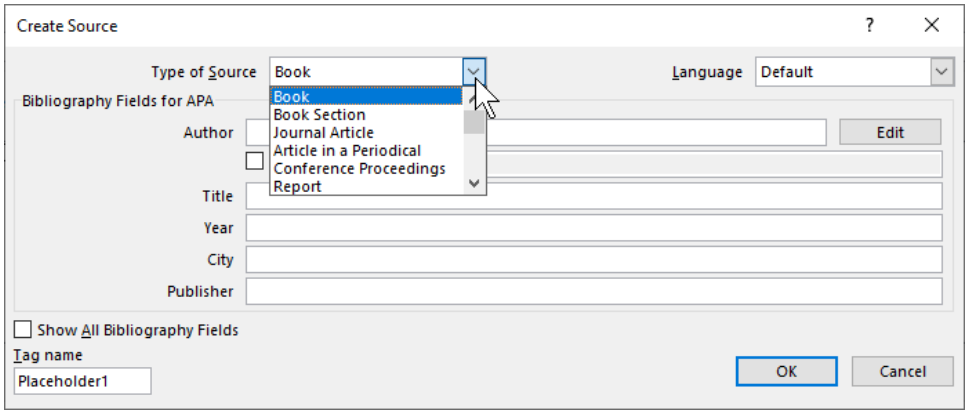
Then, in the Source Manager, click **New**:



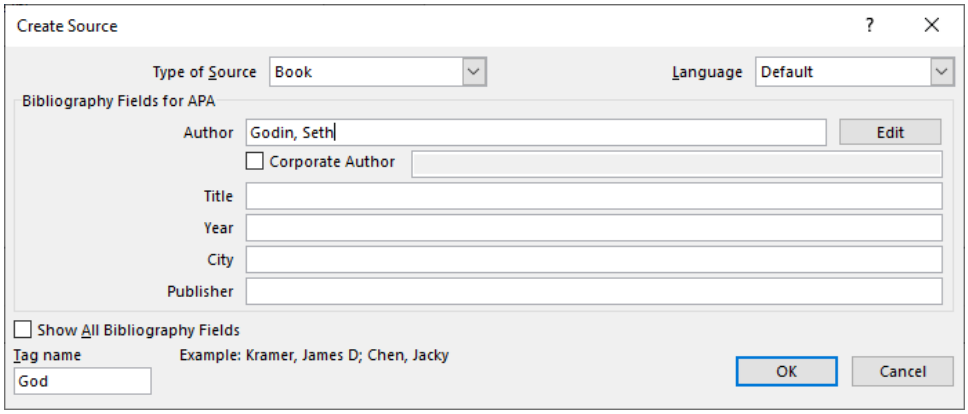
The **Create Source** dialog box will open:



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:



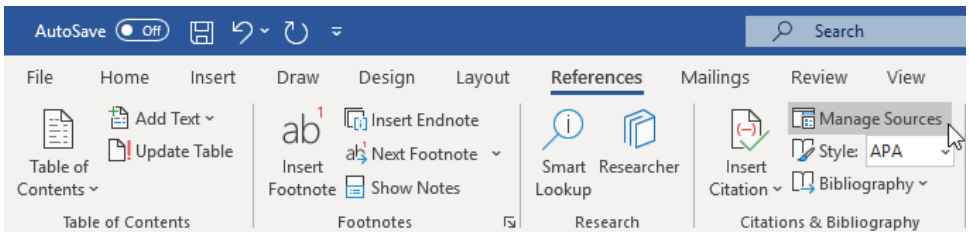
Note that as you fill in fields, Word will give you help as to the type and format of information that you should add in order to remain consistent with the current bibliographic style:



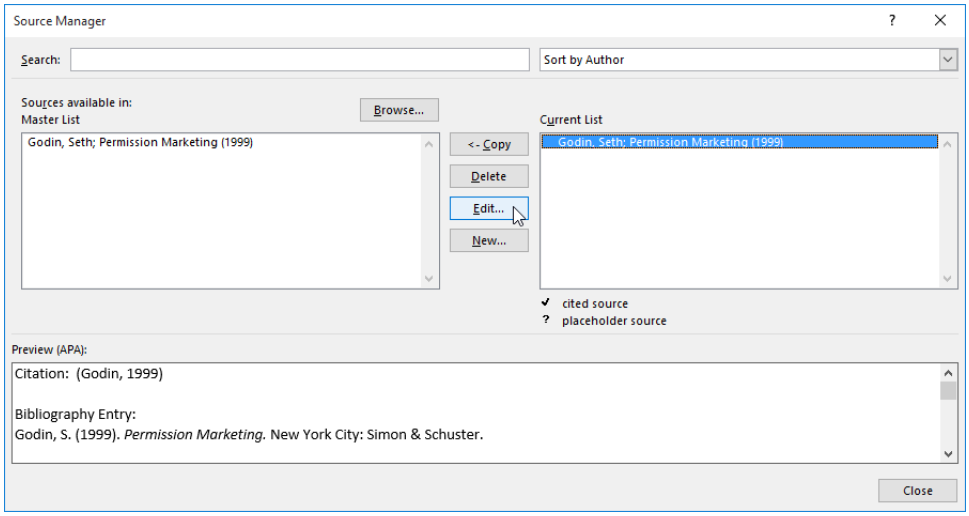
Once you are done entering information, click **OK** to complete the source.

The Edit Source Dialog Box

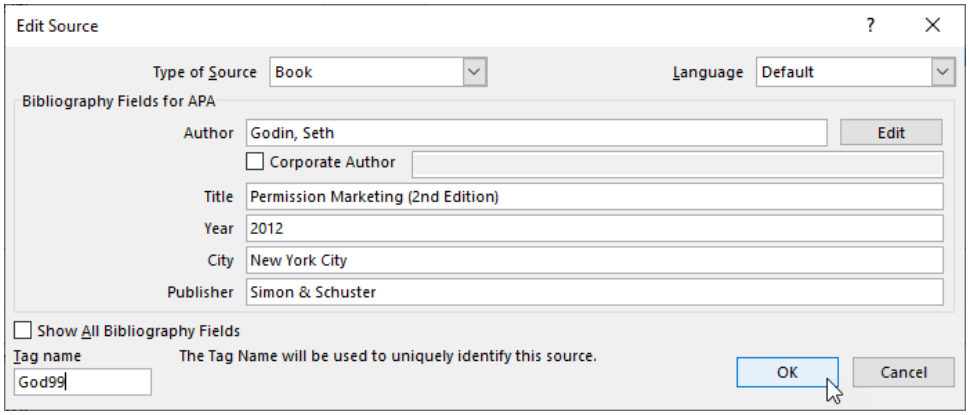
To modify sources in your document, click **References → Manage Sources**:



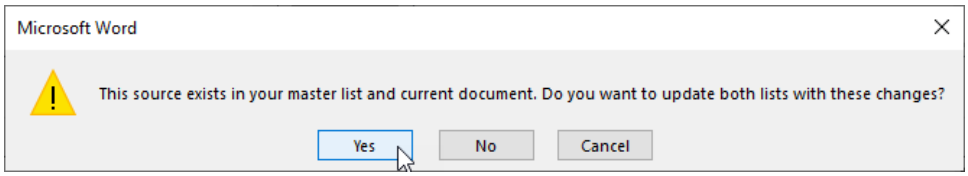
Then, in the Source Manager, click the entry that you want to modify and click **Edit**:



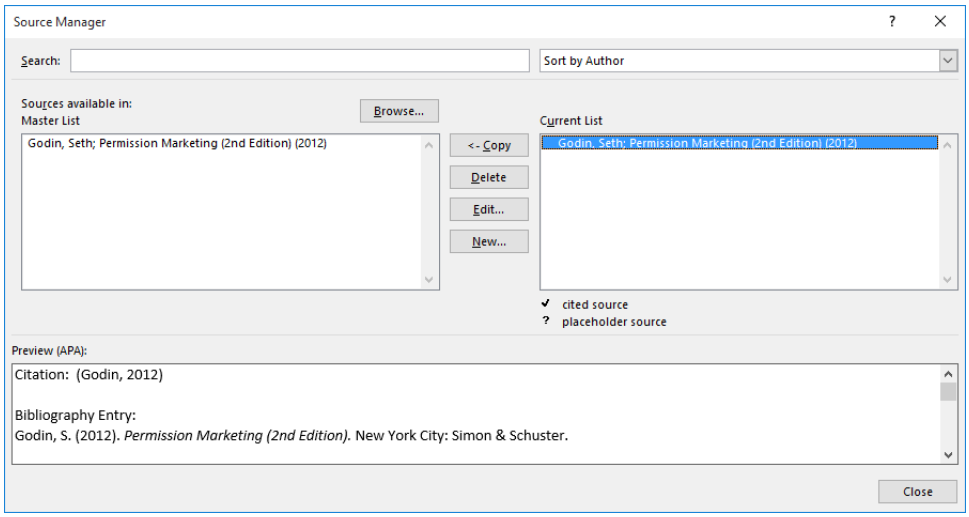
The **Edit Source** dialog box will open. Make your changes and click **OK** to save them:



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



The source will now be updated:



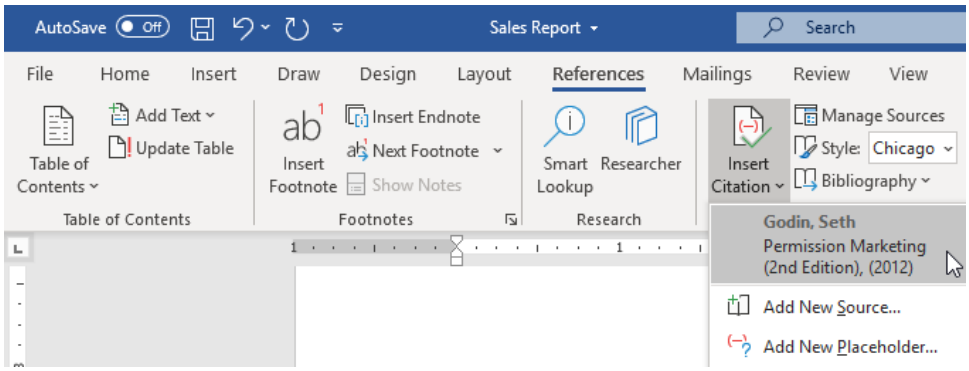
Citations

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.

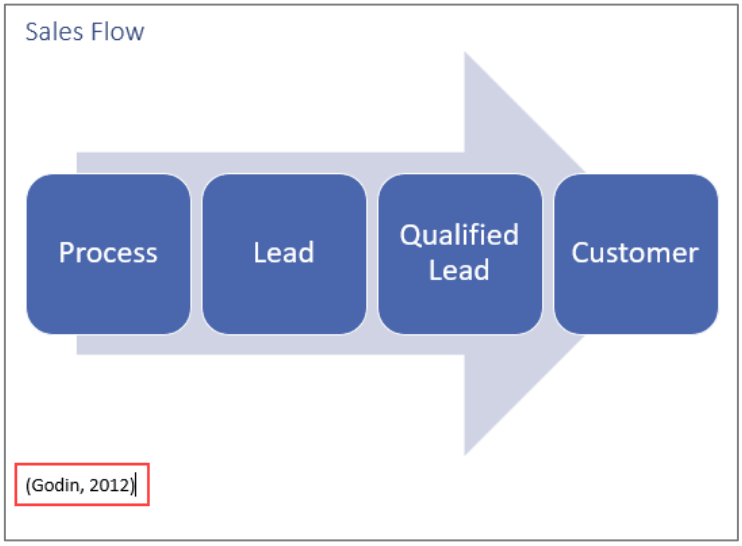
Adding Citations

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 → Insert Citation** and choose the citation to add:

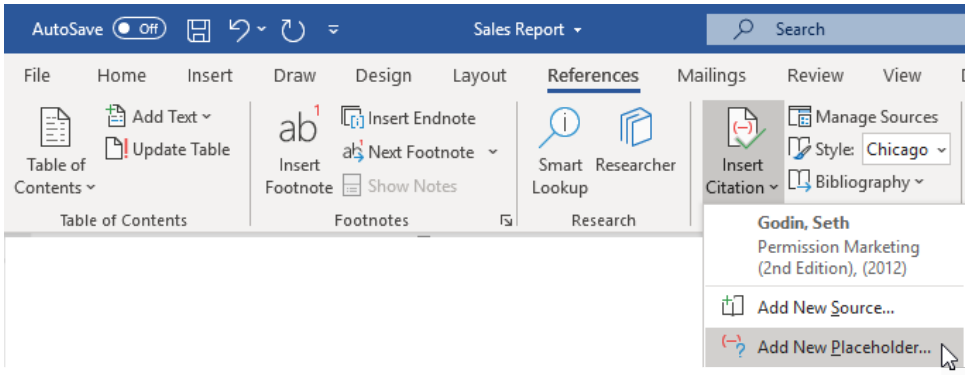


The citation will be inserted using the currently selected style:

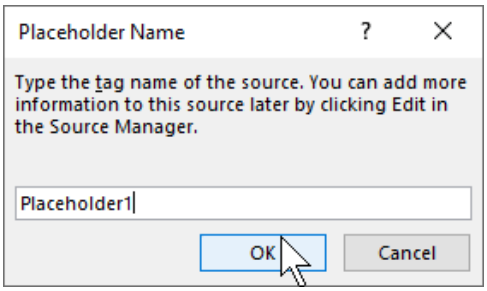


Citation Placeholders

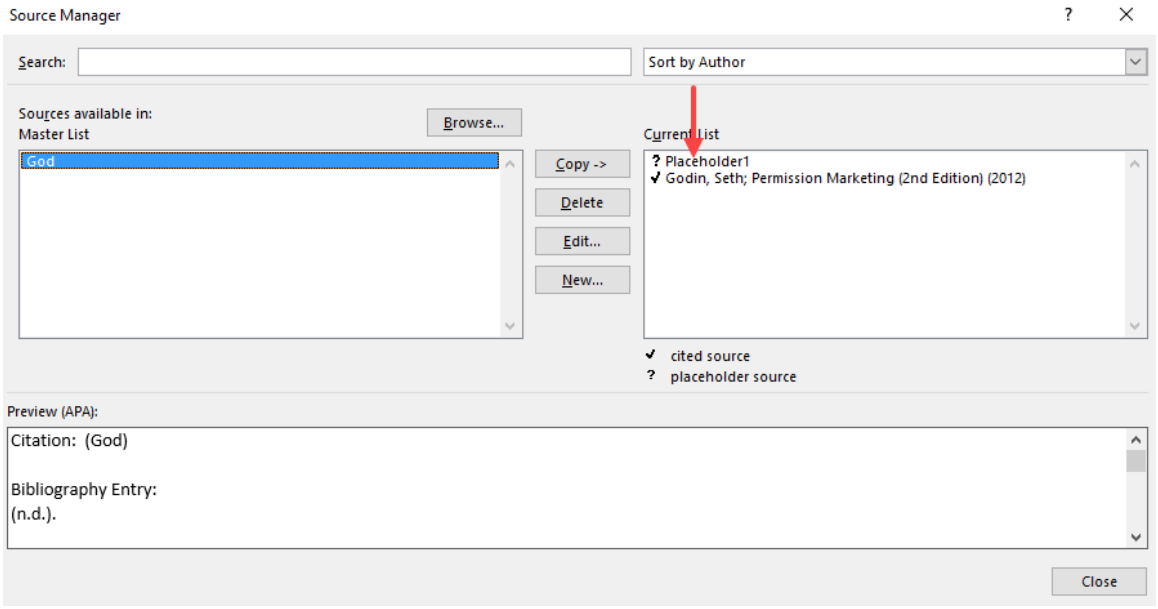
You can also add a citation placeholder from the **Insert Citation** menu:



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



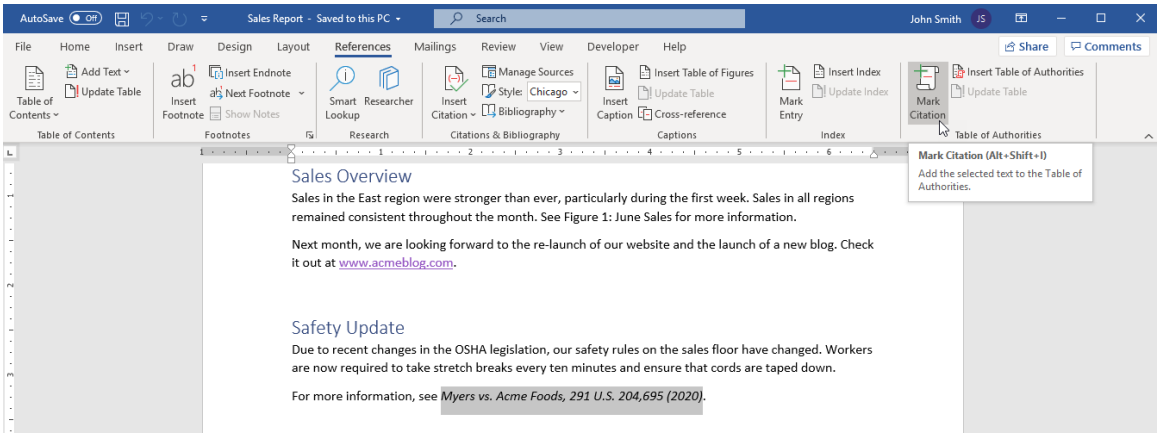
This placeholder will now be included in the **Source Manager** and in the document:



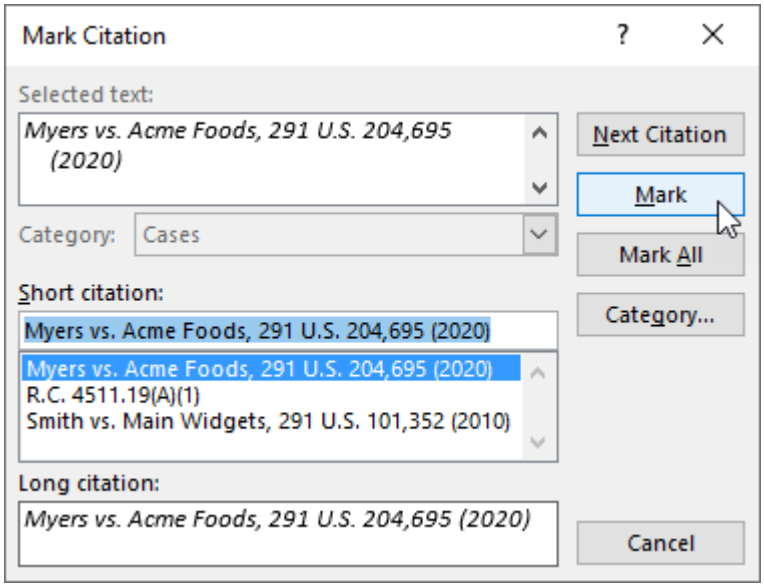
You can update it at any time in the Source Manager. Then, all related placeholders will be updated.

Legal Citations

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



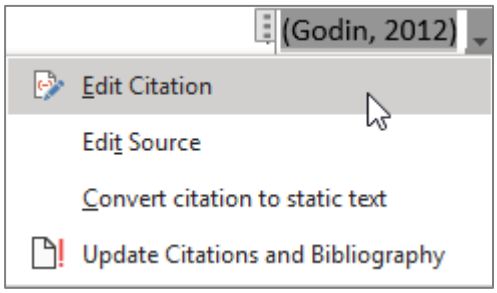
The Mark Citation dialog box will open. Make the necessary changes to the "Selected text" and "Short citation" boxes, and make sure that you have the proper category selected from the Category menu. Then, click **Mark**:



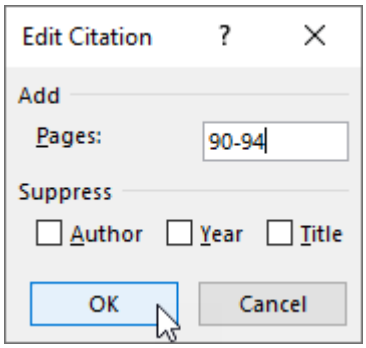
You can then close the dialog box or mark more citations.

The Edit Citation Dialog Box

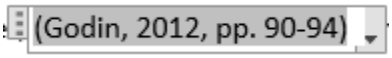
If you later want to modify a literary citation, click to place your cursor inside the citation. Then, click the drop-down arrow on the right-hand side of its container and click **Edit Citation**:



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

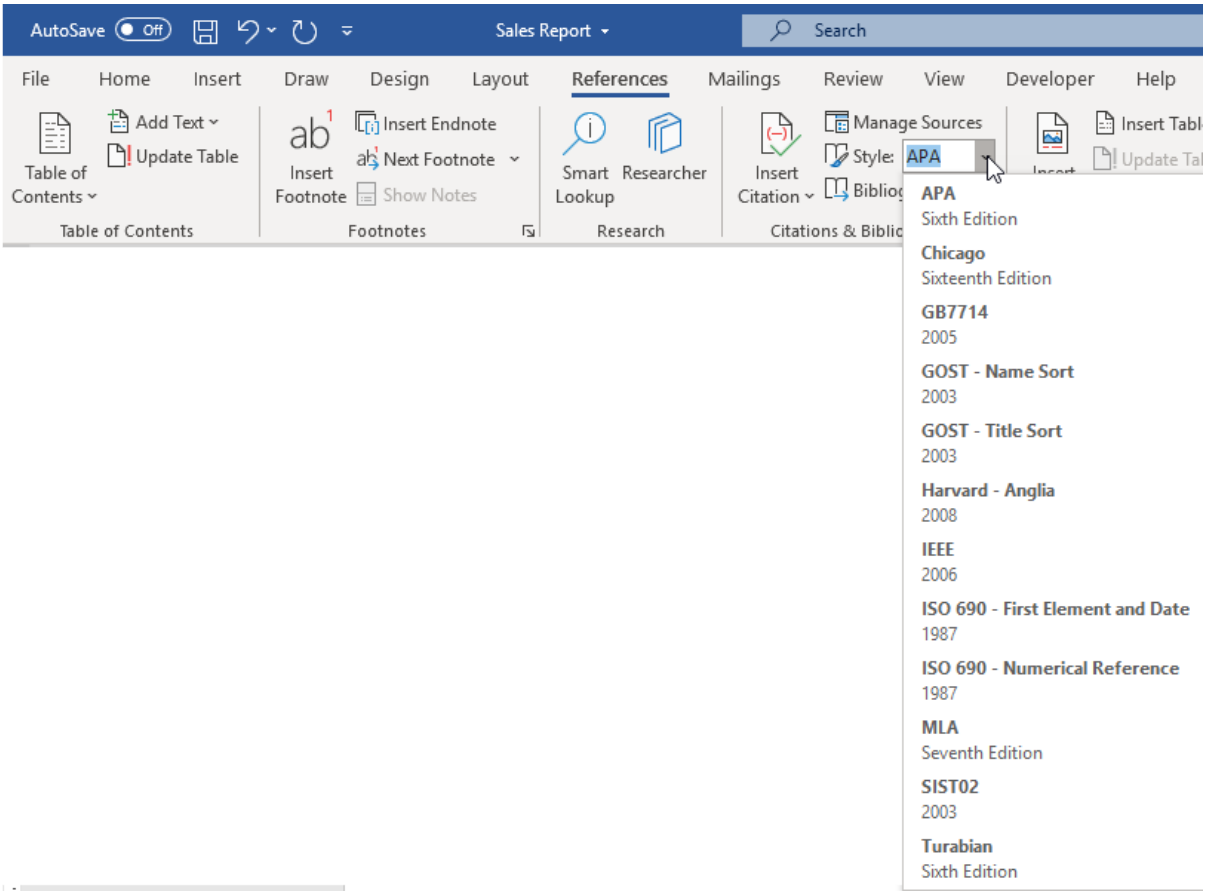


The citation will now be updated:



Citation and Bibliography Styles

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



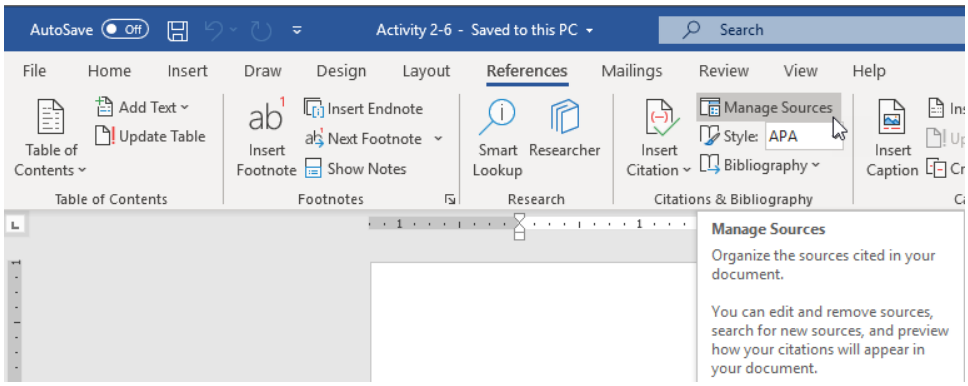
After clicking on one of the options in this menu, Word will update all sources in the document to match that style. It will also create all future references in that style.

Activity 2-6: Adding Citations and a Bibliography

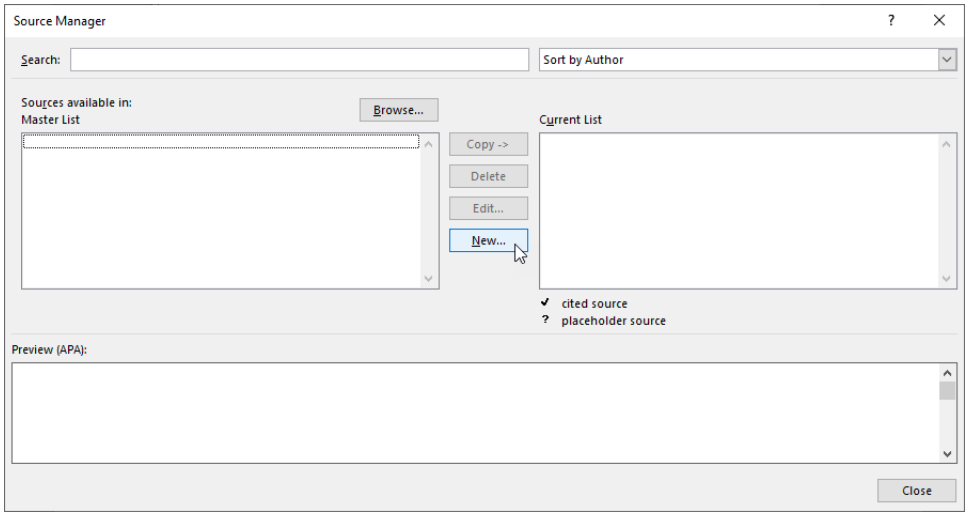
In this activity, you will add sources and citations to the solar system document. Note that when we refer to a page number, we are referring to the physical location of the page, not the formatted number that appears on the page.

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

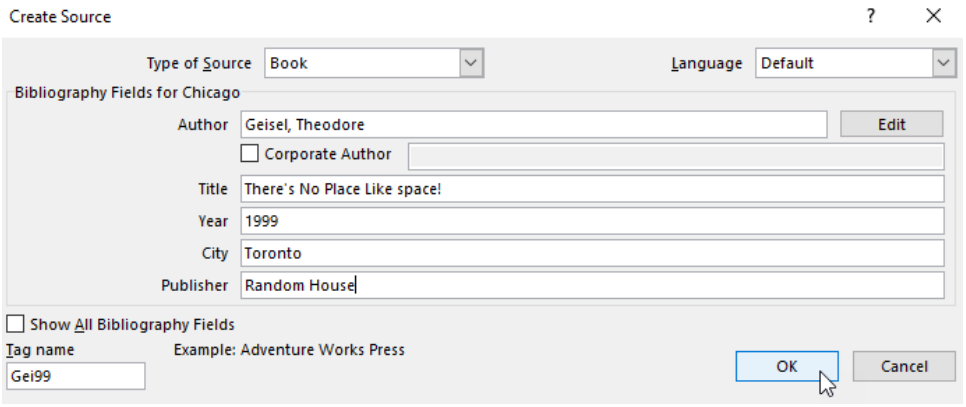
2. First, let us add our sources to the document. Click **References → Manage Sources**:



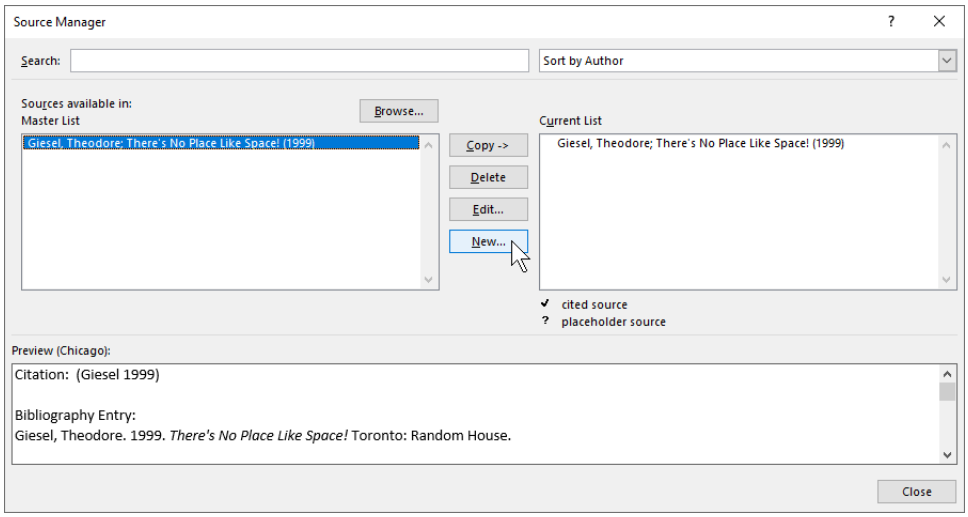
3. The Source Manager will open. Click **New**:



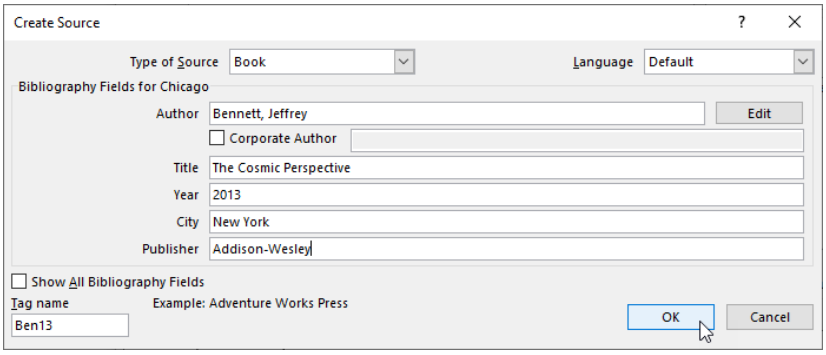
4. Ensure that "Book" is selected as the type of source. Enter the information shown below and click **OK**:



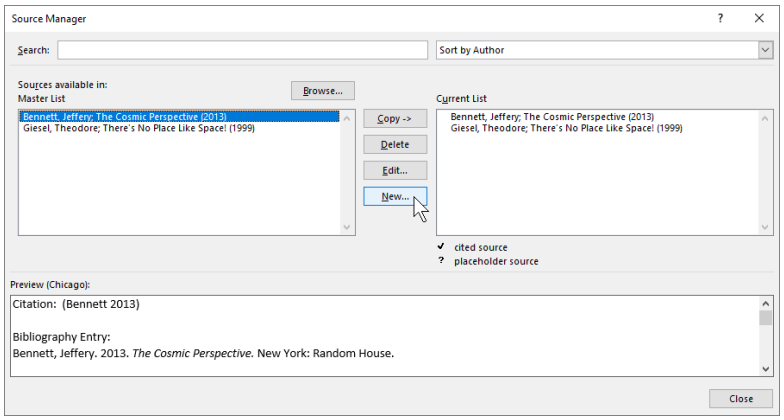
5. You will be returned to the Source Manager and the source will be saved. Let us create another source by clicking **New**:



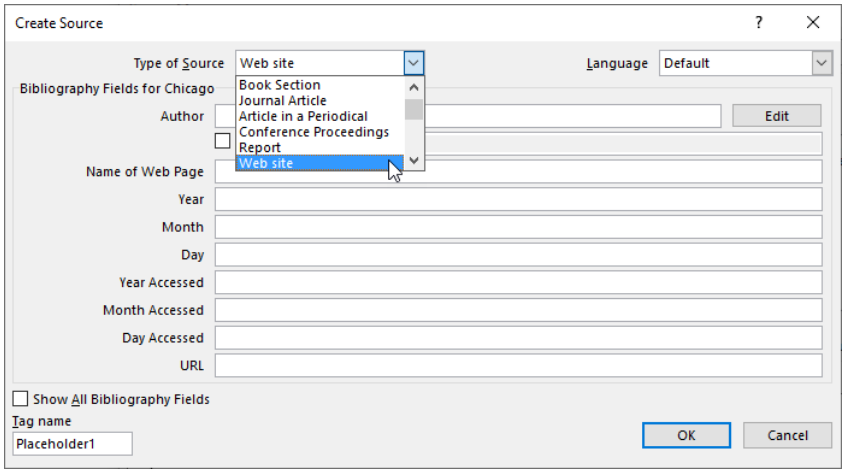
6. This source is also a book. Enter the information shown below and click **OK**:



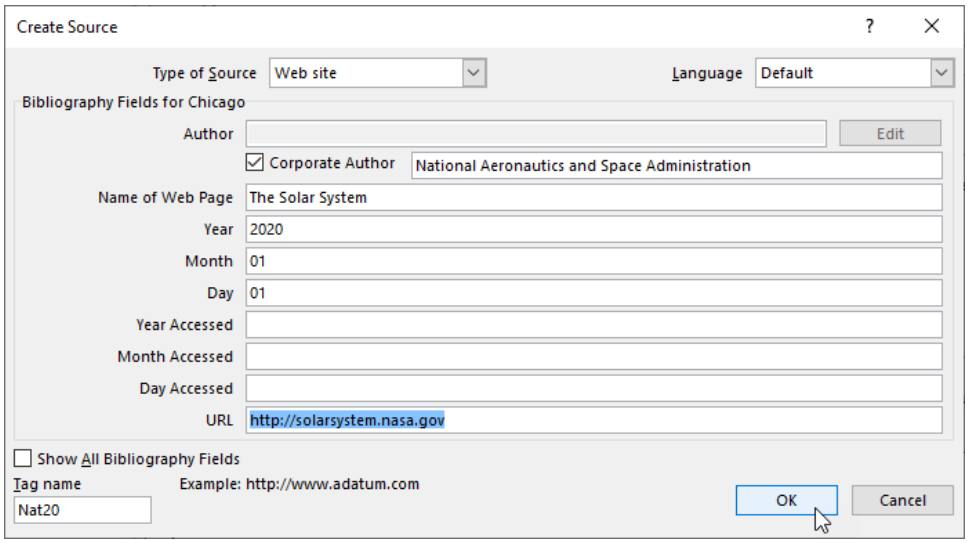
7. We have one more source to add, so click **New** again:



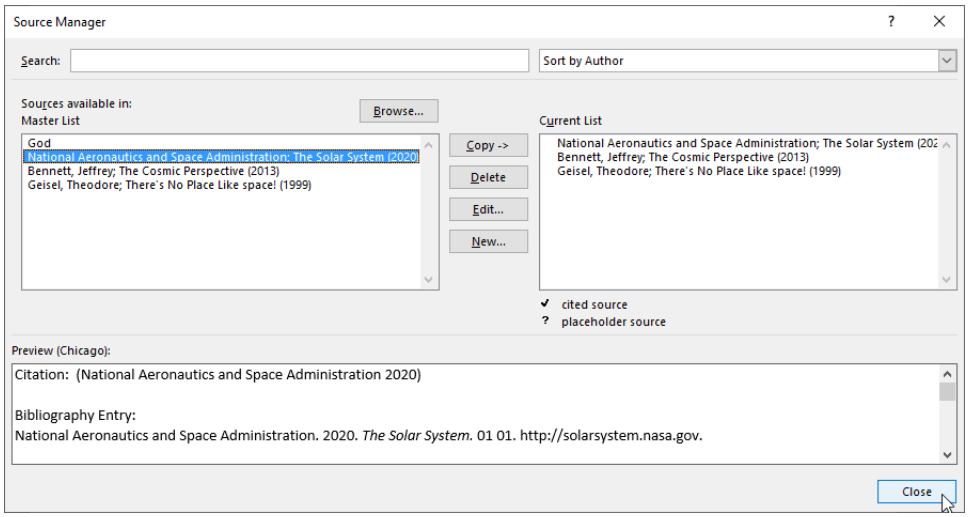
8. This time, we are adding a website, so choose that source type from the menu at the top of the dialog box:



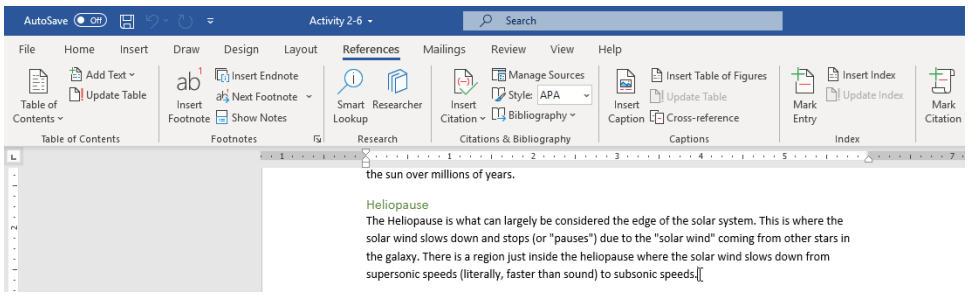
9. Enter the information shown below and click **OK**:



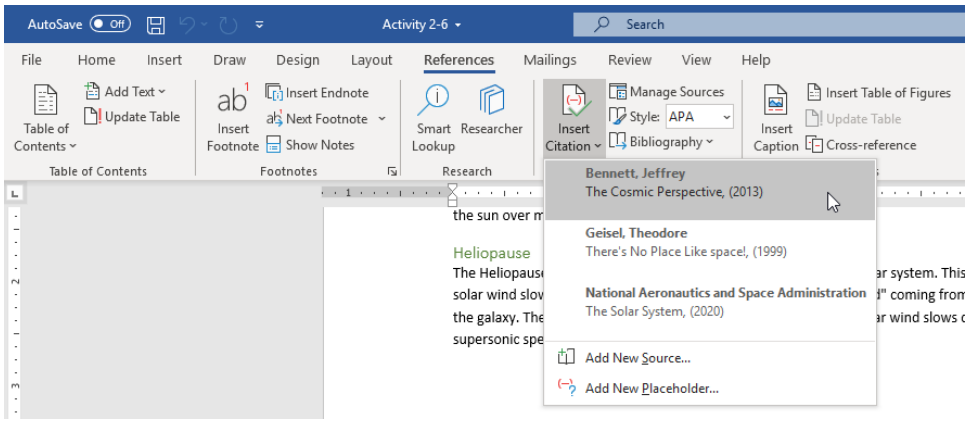
10. All sources should now be in the master list and the current list. Click **Close** in the Source Manager:



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



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



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 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 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:

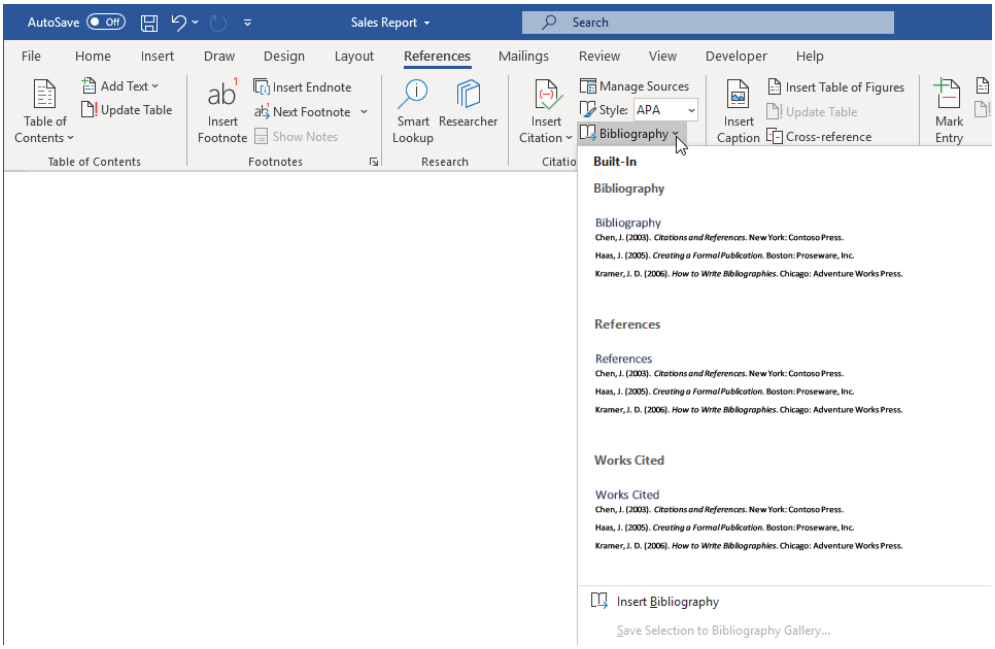
- About bibliographies
- How to insert and update a bibliography

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.

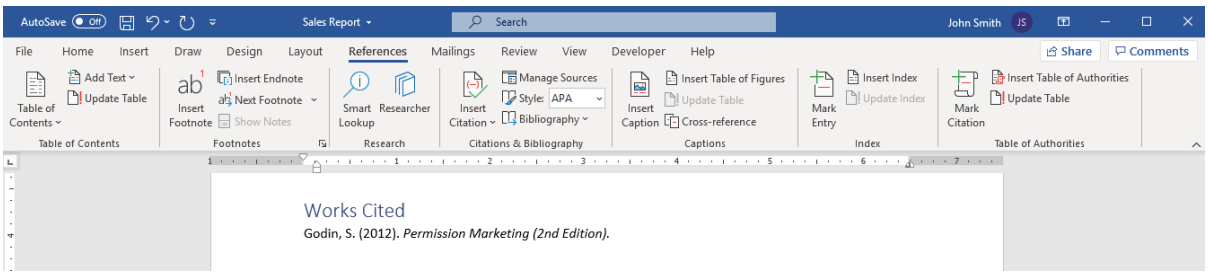
Adding a Bibliography

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



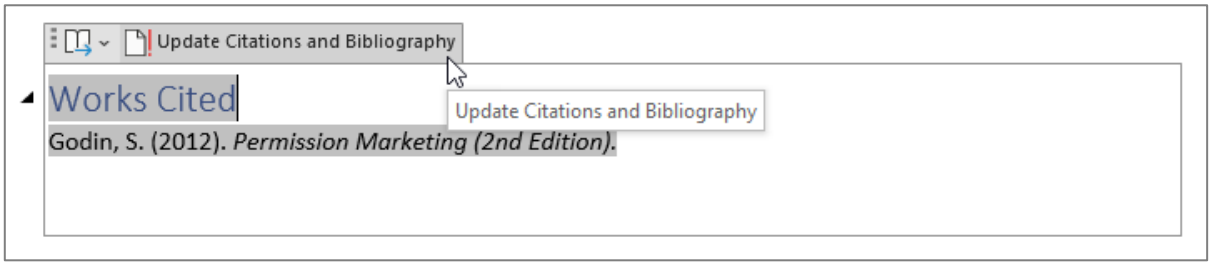
From this menu, click the style of bibliography that you want to use. You can also click the Insert Bibliography command to insert a bibliography with no heading.

The bibliography will then appear in your document:

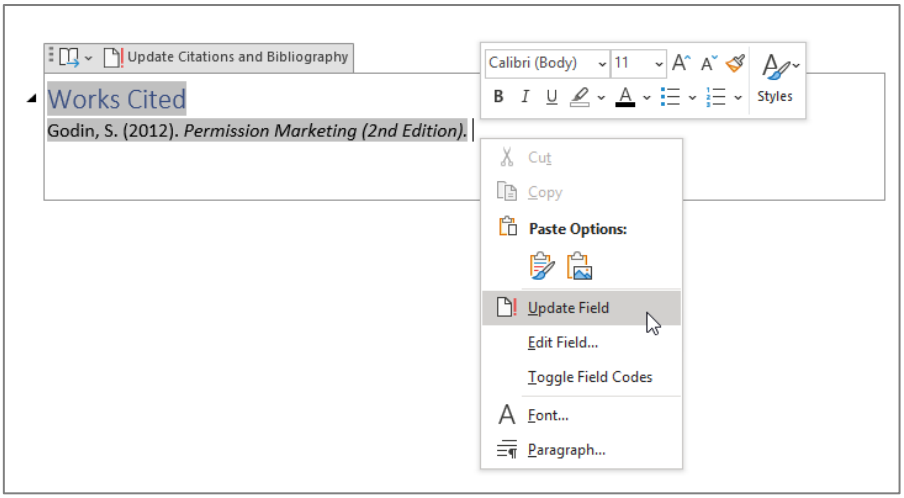


Updating the Bibliography

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:



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



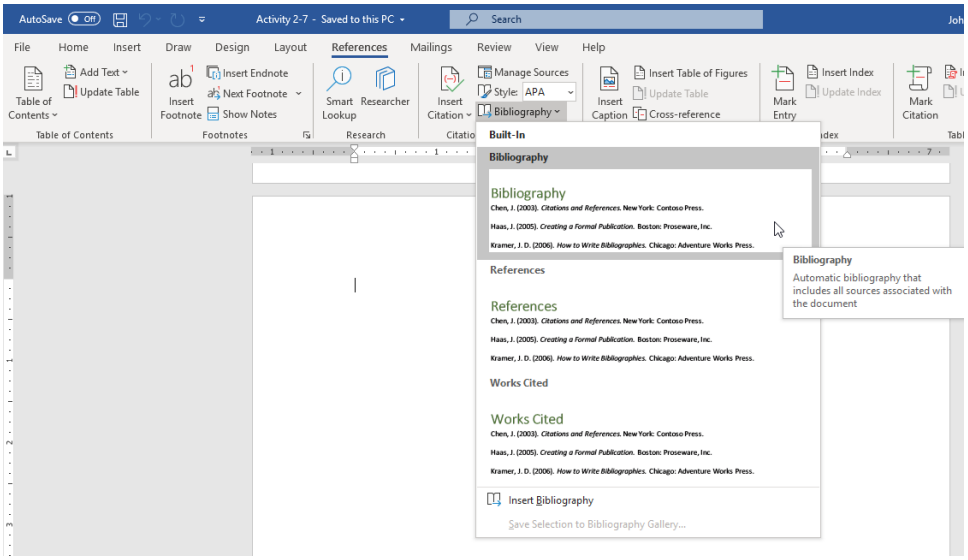
You can also use the F9 shortcut key when the bibliography is selected.

Activity 2-7: Adding Citations and a Bibliography

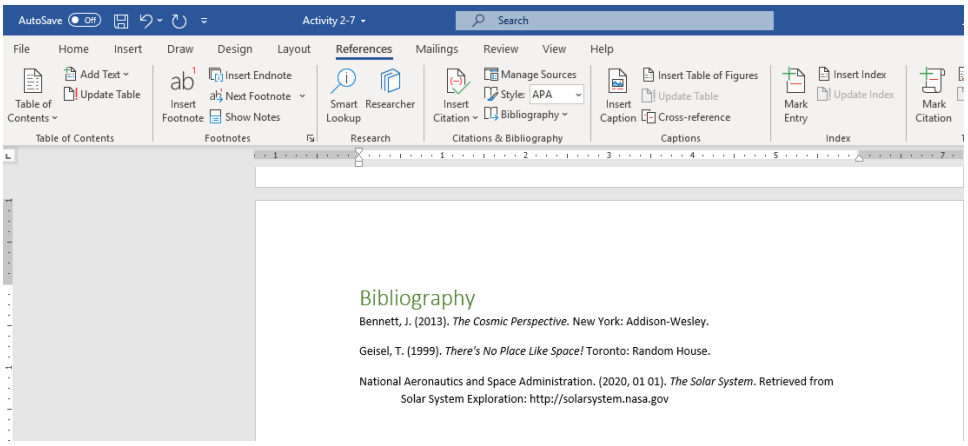
In this activity, you will complete the solar system document by adding a bibliography. Activity 2-6 must be completed prior to completing this activity.

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

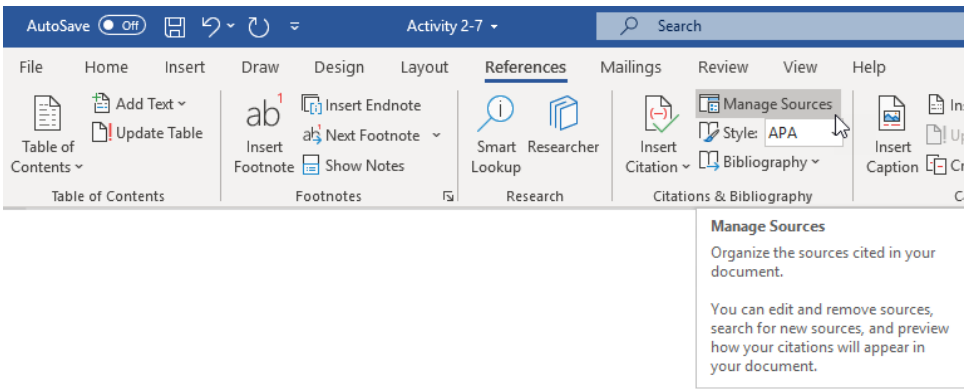
2. Let us add the bibliography to the document. Go to the end of the document and make sure your cursor is on the last page. Click **References → Bibliography** and click the first item in the gallery:



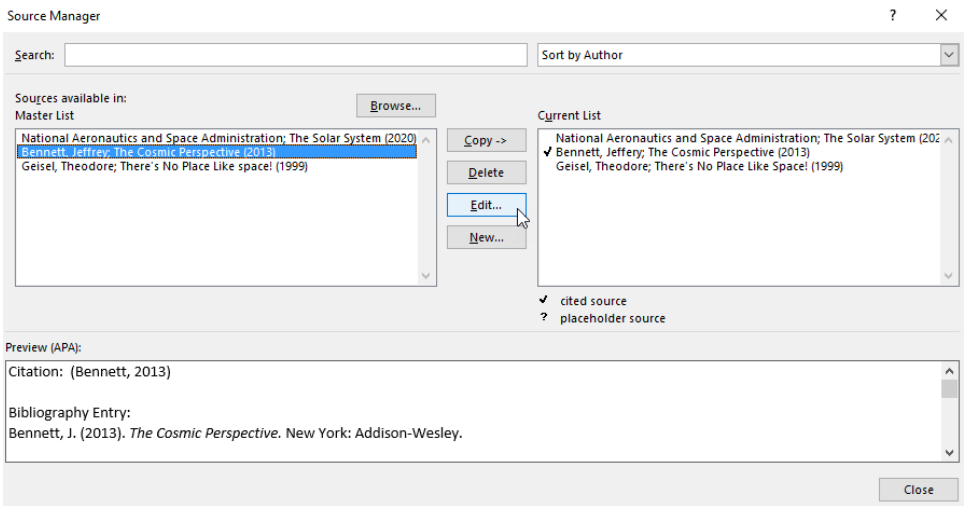
3. The bibliography will be added with the sources that we created in Activity 2-6:



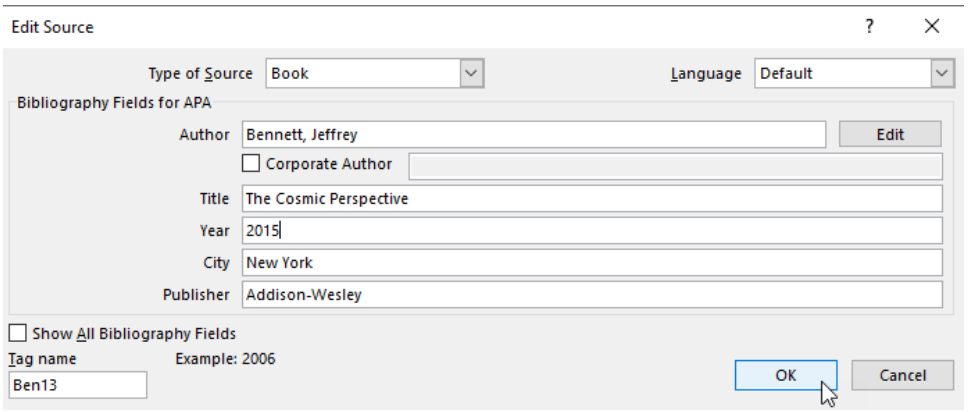
4. After reviewing the bibliography, you realize that the year of one of the books is wrong. Click **References → Manage Sources**:



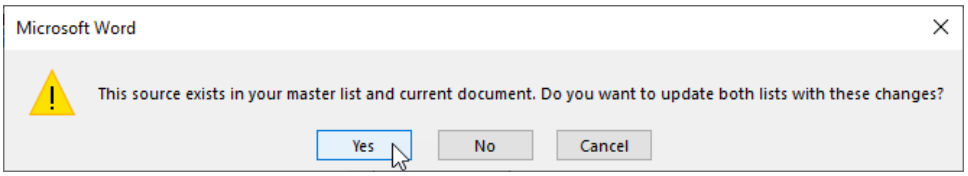
5. Select the second book in the list on the left-hand side. Click **Edit**:



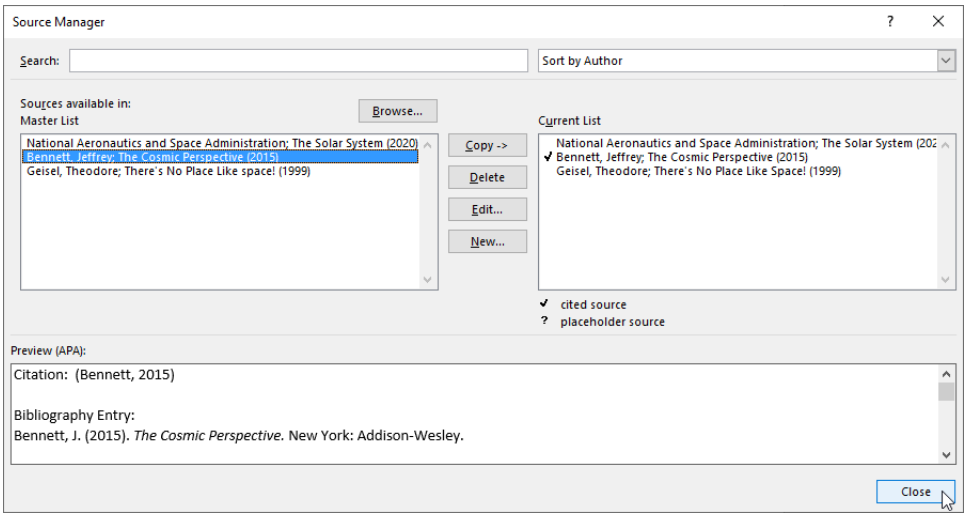
6. The Edit Source dialog box will open. Change the text in the Year field to 2015 and click **OK**:



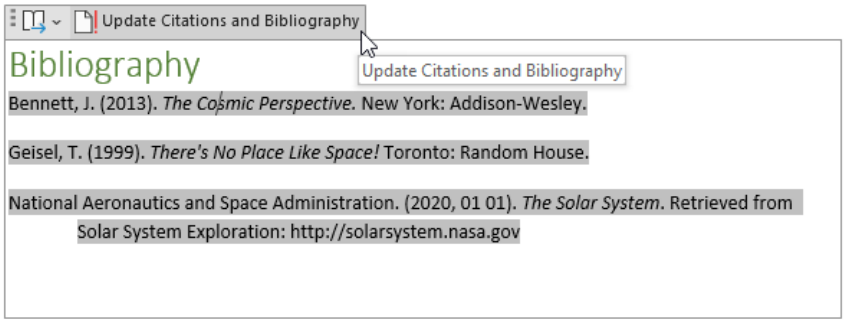
7. You will be prompted to update the current document's list. Click **Yes**:



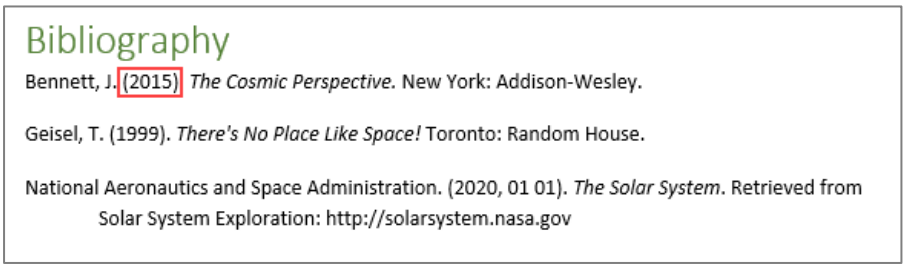
8. **Close** the Source Manager dialog box:



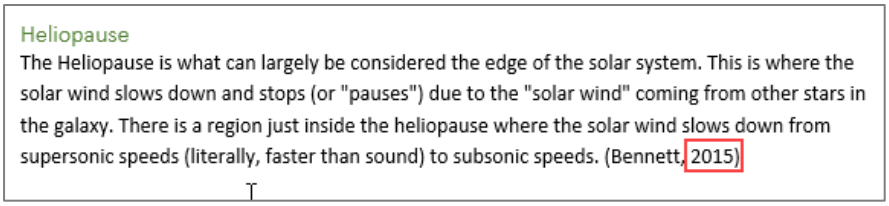
9. Back in the document, click inside the bibliography to select it. Click "**Update Citations and Bibliography**" at the top of the table:



10. The year will be updated:



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



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.

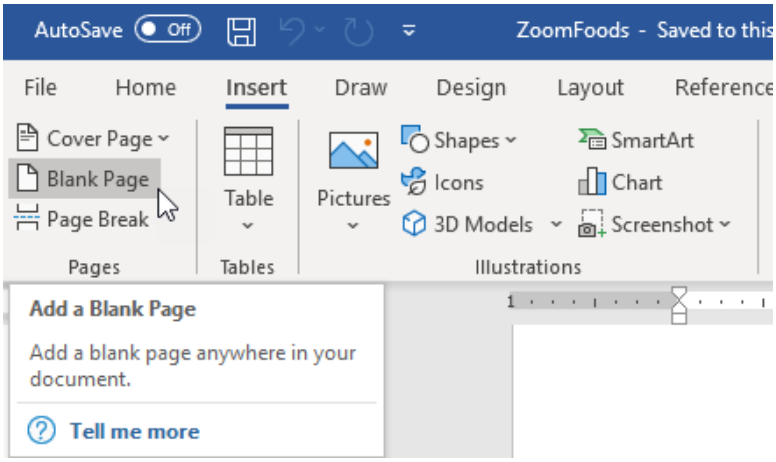
Topic Objectives

In this session, you will learn:

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

Inserting Blank Pages

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

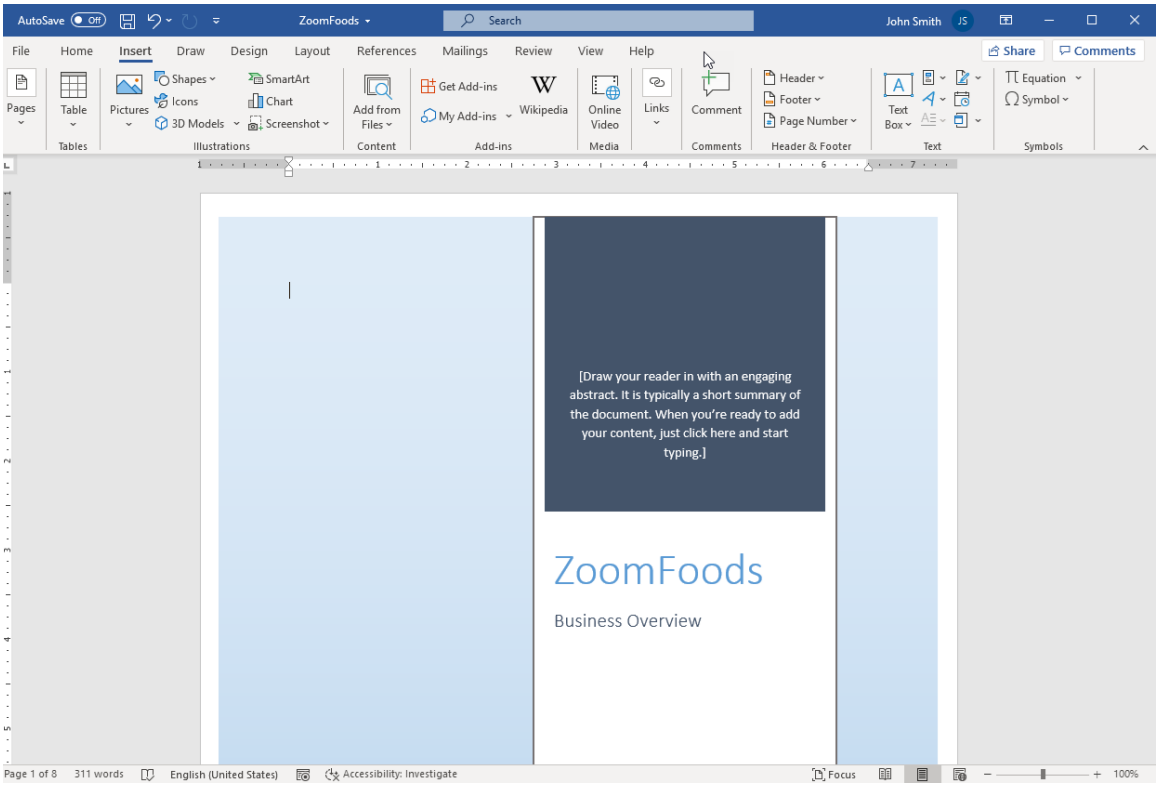


This will add a blank page to the document.

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:



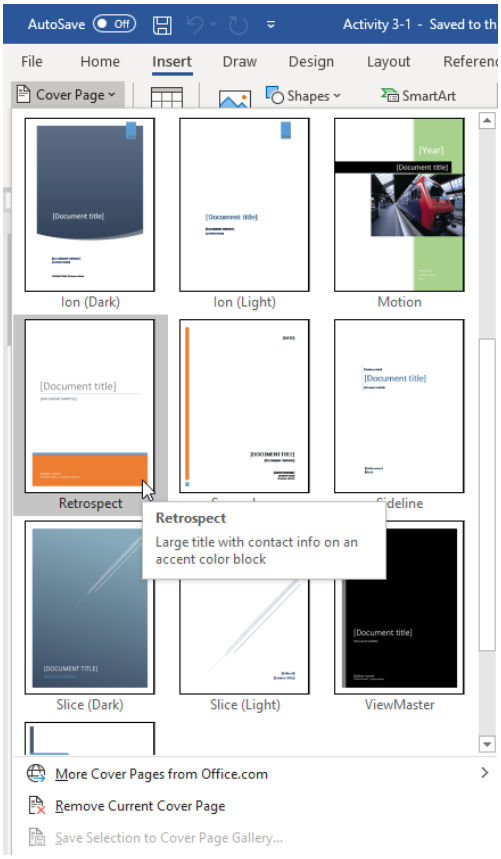
Some text may automatically be inserted for you based on the document's properties. You can add any other elements you like (such as your own graphics) or change the formatting of the existing elements.

Activity 3-1: Inserting Blank and Cover Pages

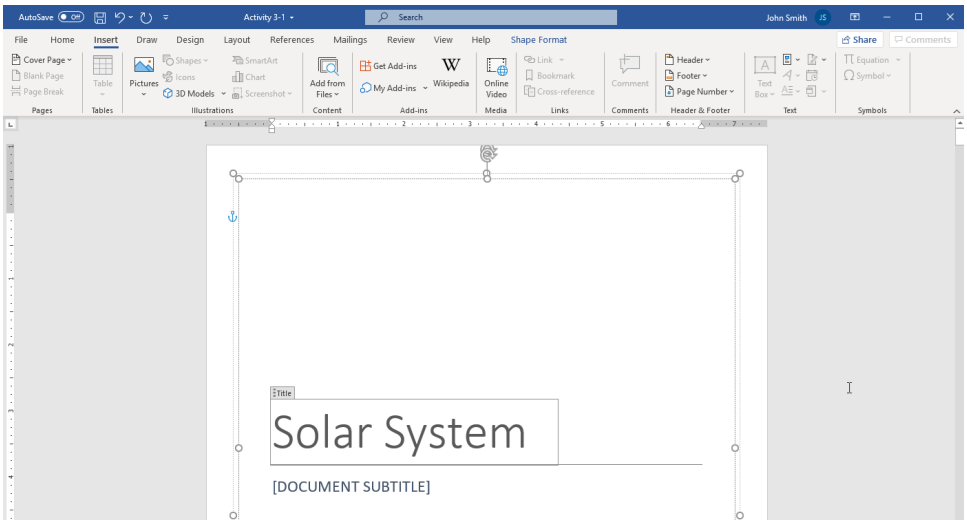
In this activity, you will add a cover page and a blank page to a document.

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

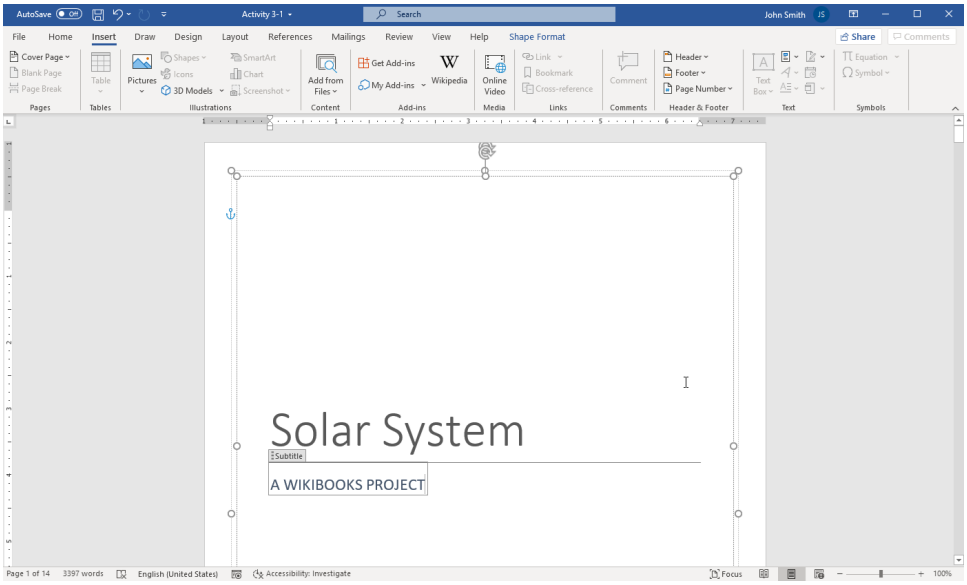
2. First, let us add a cover page. Click **Insert → Cover Page → Retrospect**:



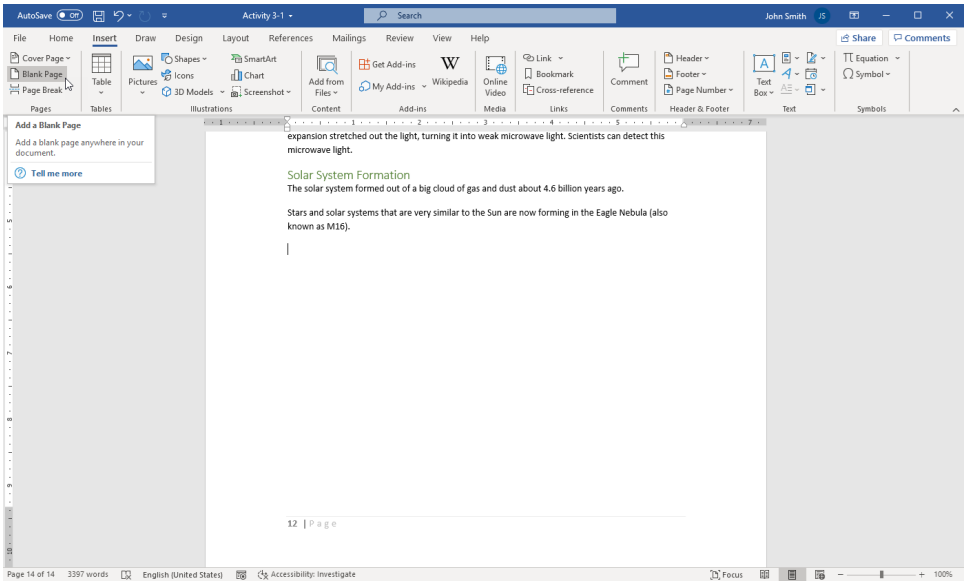
3. Enter "**Solar System**" for the document title:



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



5. 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**:



6. 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.

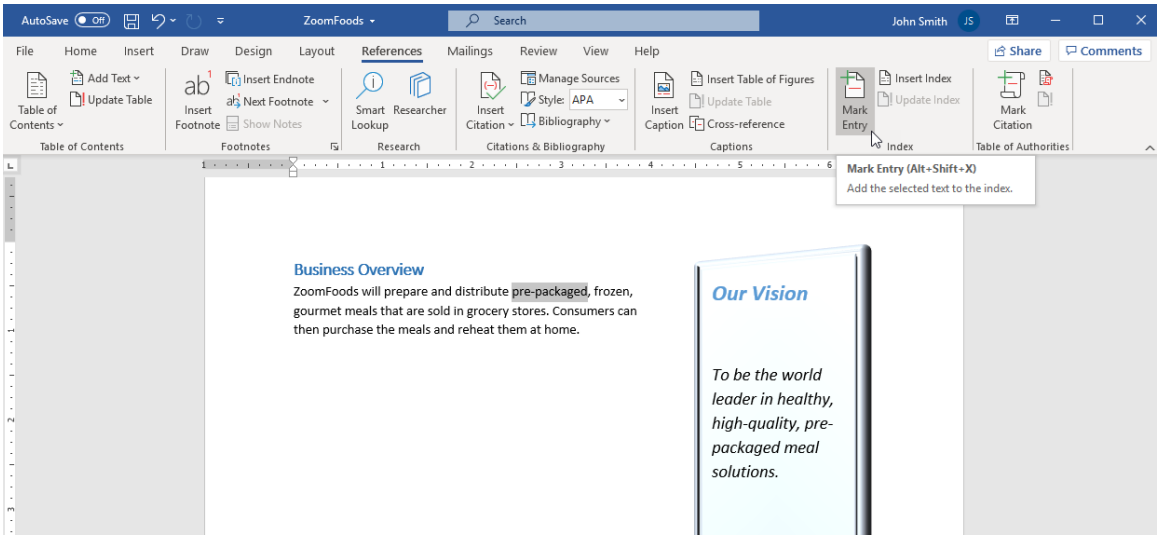
Topic Objectives

In this session, you will learn:

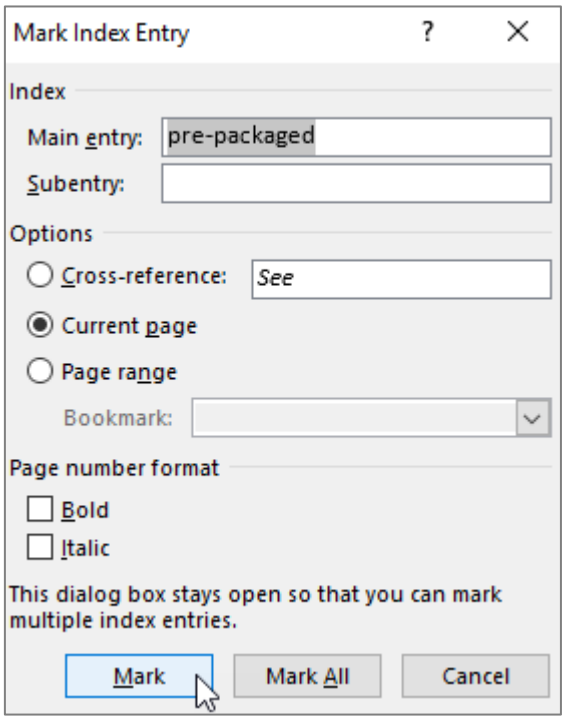
- How to mark index entries with the Mark Index Entry dialog box
- How to identify index entry field codes
- How to use the Index dialog box and its various options
- How to automatically mark entries with a concordance file
- How to use the Style and Modify Style dialog boxes to customize an index
-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



You will then see the **Mark Index Entry** dialog box:



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

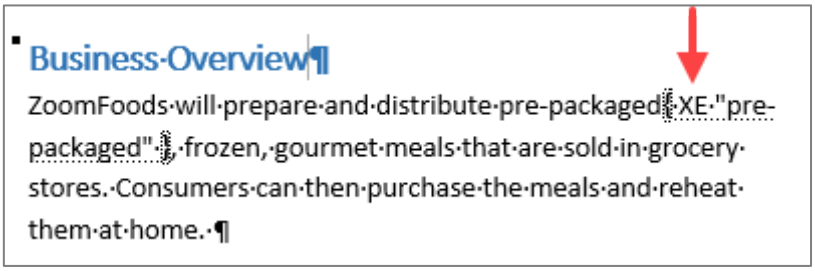
You can use the Options section in the Mark Index Entry dialog box to change the type of entry that is created. By default, Microsoft Word will create an entry to the current page, but you can choose another page range. Or, you can omit the page reference and refer the reader to another index entry using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

Subentries

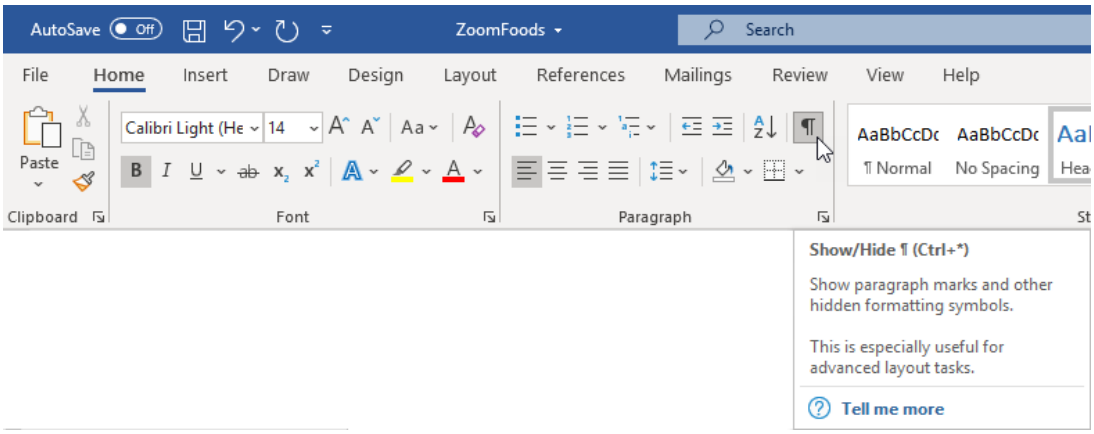
Each index reference can contain a main entry and a subentry. For example, if a recipe book used an index, you might see an entry for Chocolate, and then subentries for Chocolate Cake, Chocolate Chip Cookies, etc.

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:

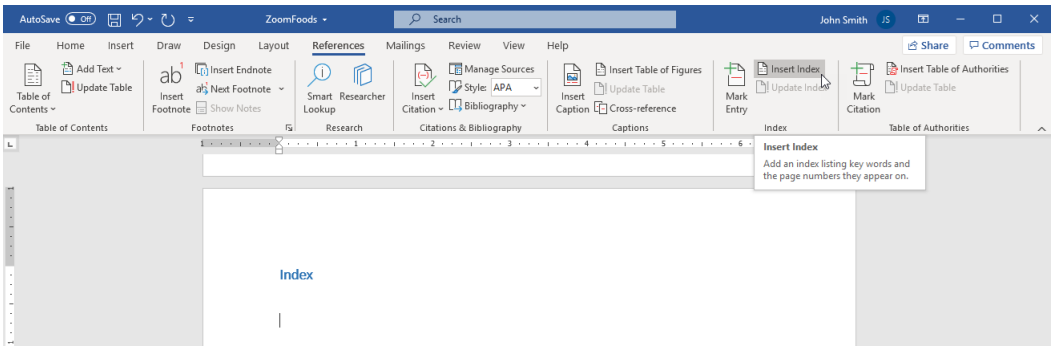


As you can see, index entries are marked with "XE" and specialized curly brackets. Remember, you may hide these characters at any time by clicking **Home → Show/Hide**:

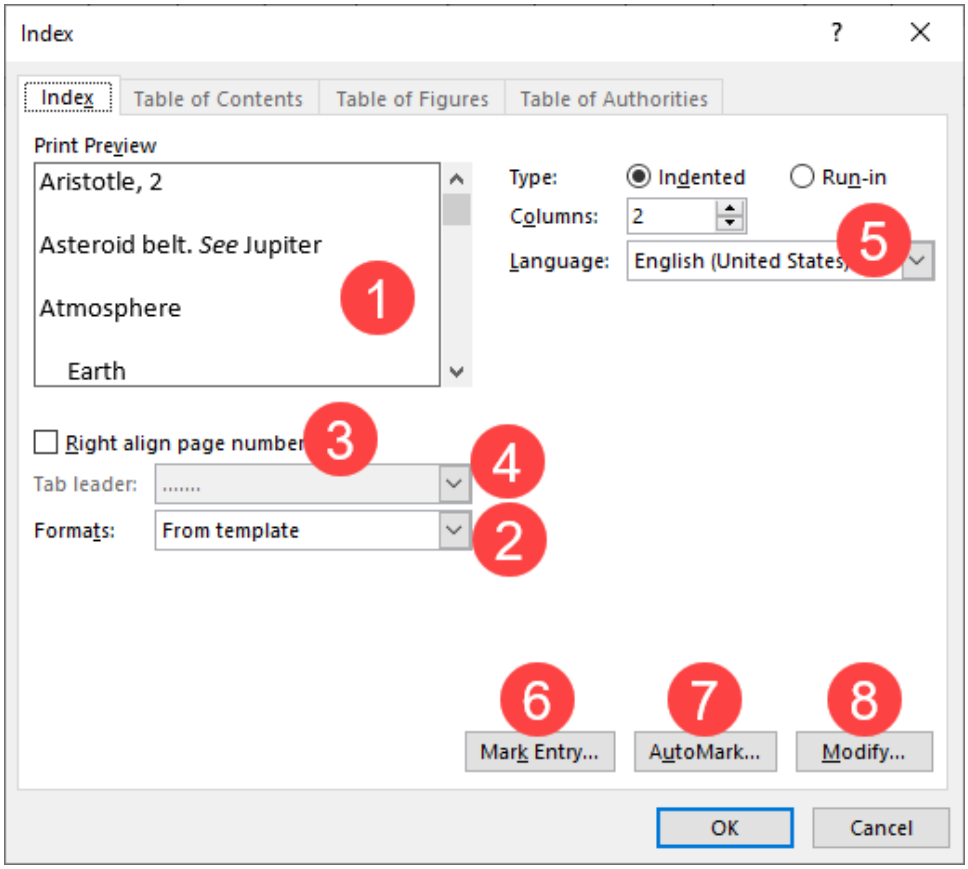


The Index Dialog Box

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 → Insert Index**:

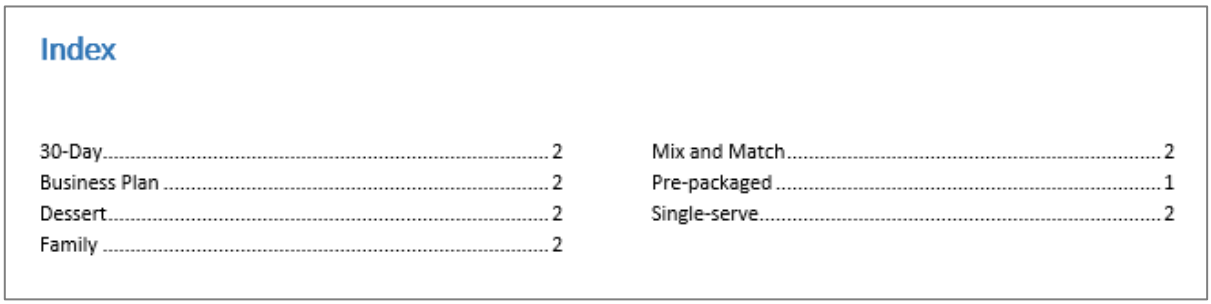


The Index dialog box will appear on your screen. Here, you can control every aspect of your index's appearance:



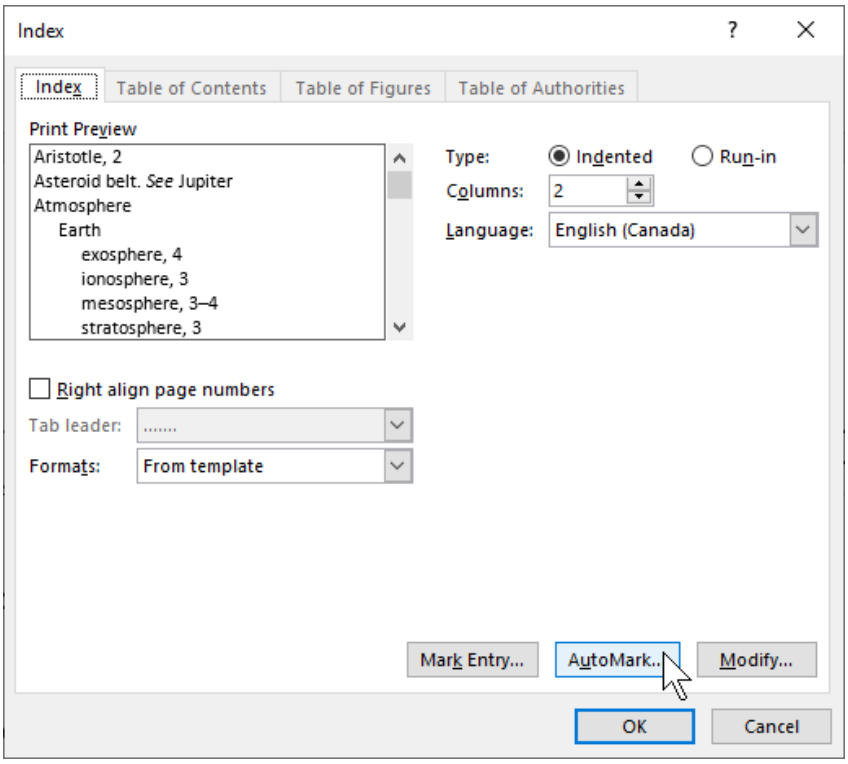
The **top left of the dialog box (1)** shows a preview of how the index will look with the current settings. You can also choose a **pre-defined format** for the index **(2)** and then customize the **alignment (3)** and **tab leader (4)** used for page numbers. On the right-hand side of the dialog box **(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:

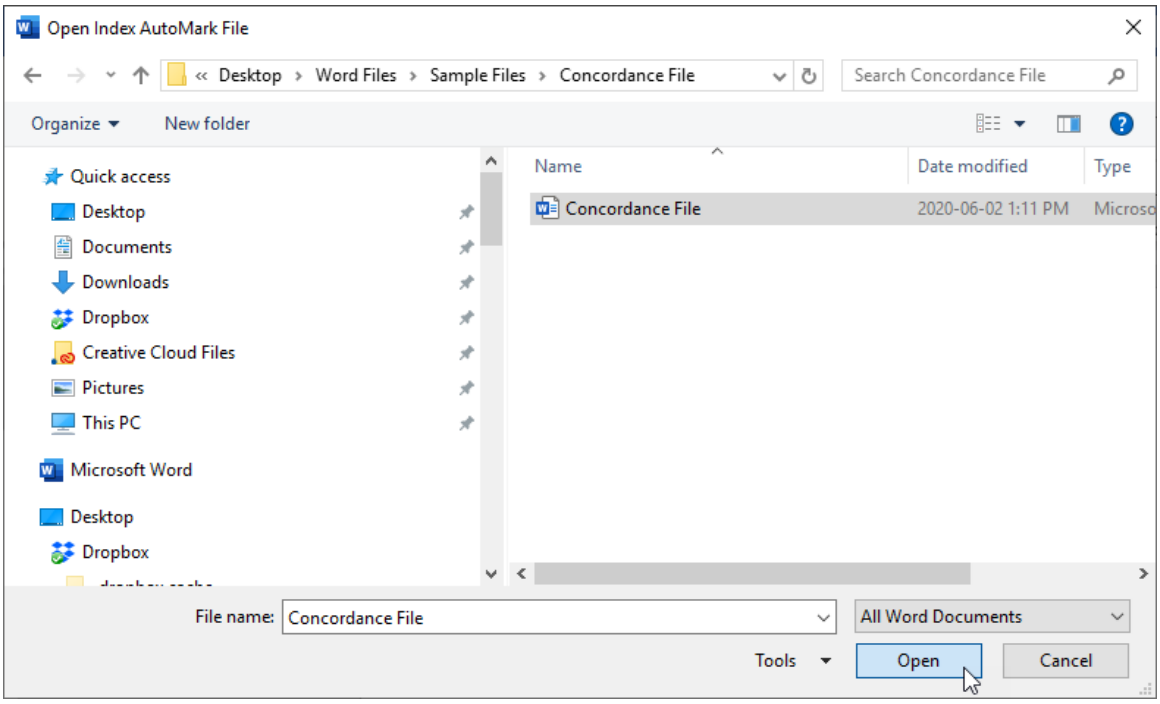


The Open Index AutoMark File Dialog Box

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:



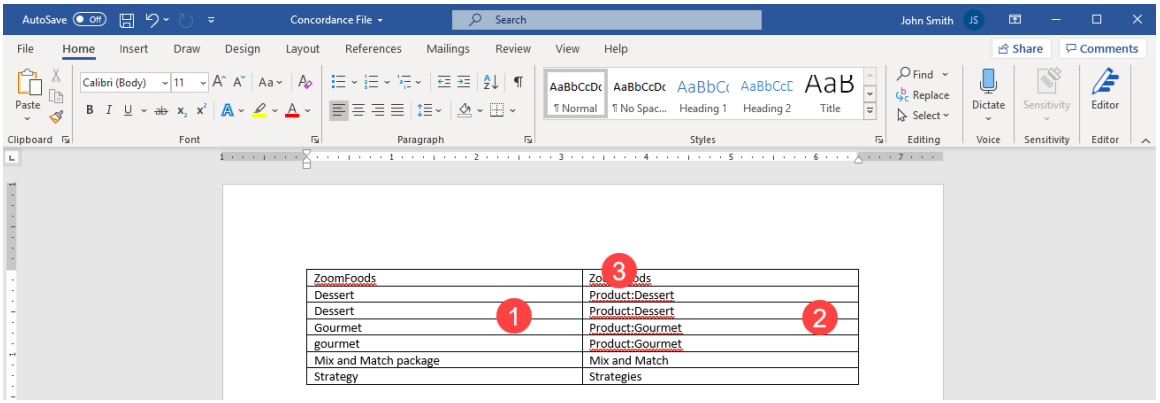
Now, you can browse to and select the concordance file:



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:

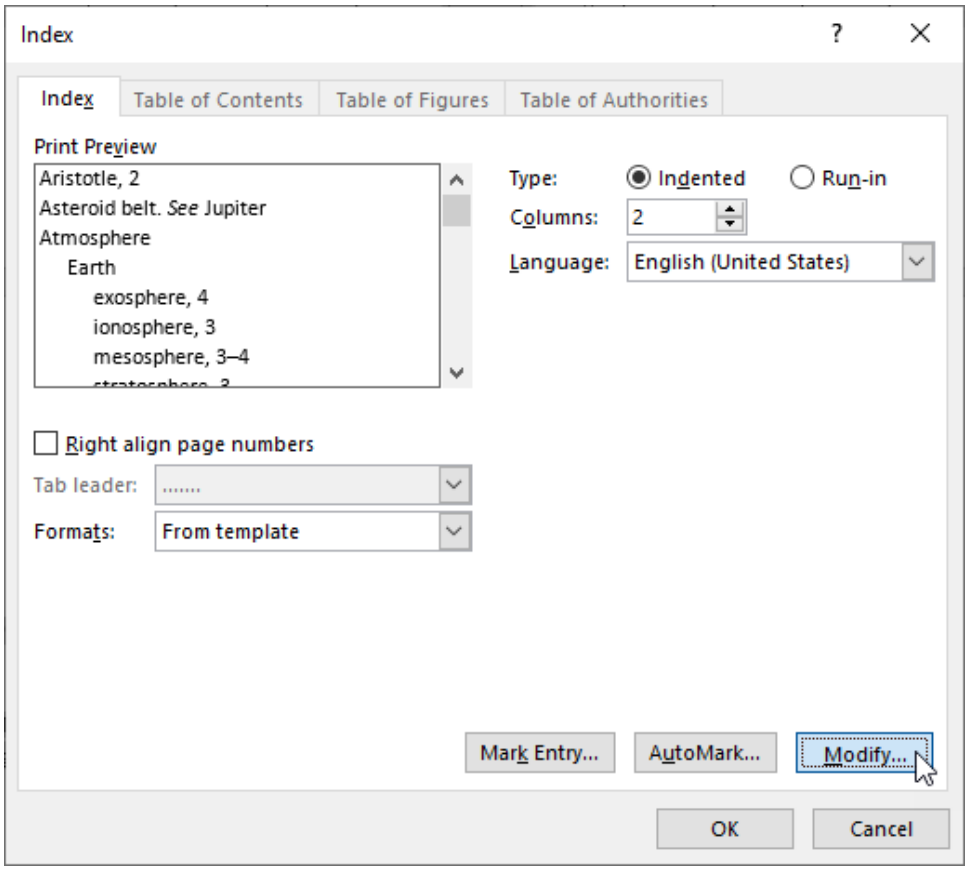


The first column **(1)** contains the text that Microsoft Word will look for when marking index entries. Each word must appear exactly in the table as it does in the document. (For example, in the sample file you can see two entries each for “dessert” and “gourmet” one that is capitalized and one that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

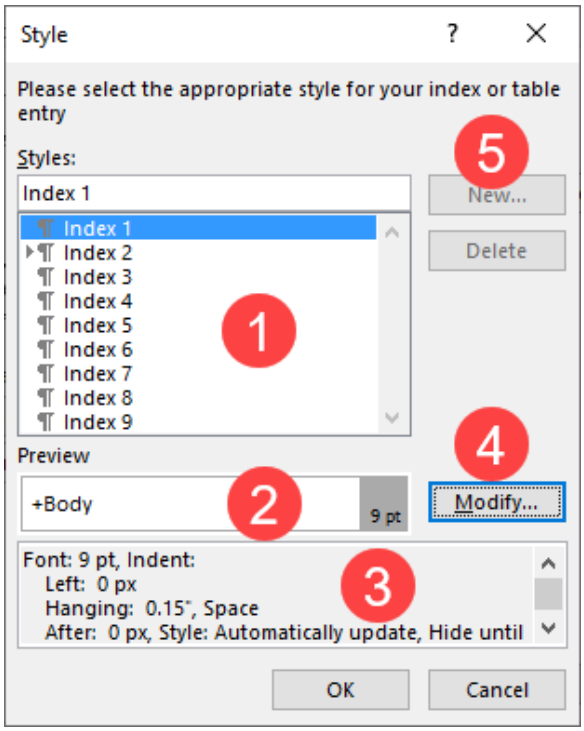
The second column **(2)** contains the index entries themselves, again appearing exactly as they will in the index. Entries and subentries are separated by a colon (as indicated by the number three **(3)** in the image above). You can create up to eight levels of subentries in this way!

The Style Dialog Box

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

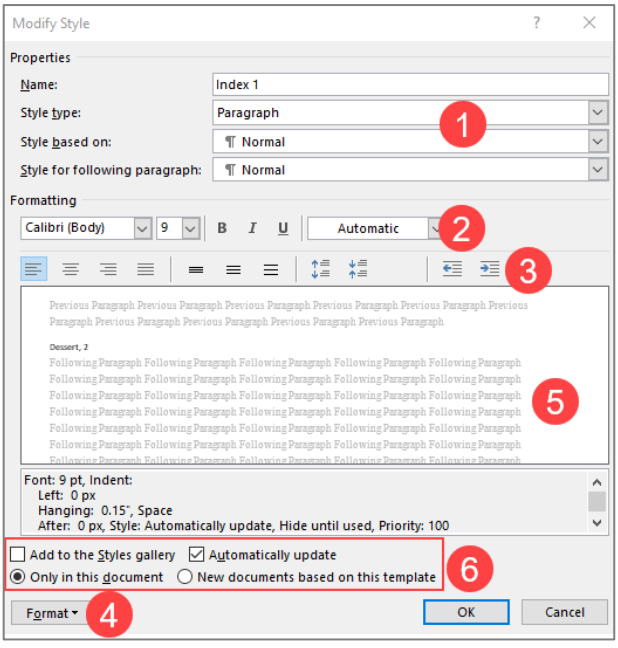


The **Style** dialog box will open:



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.

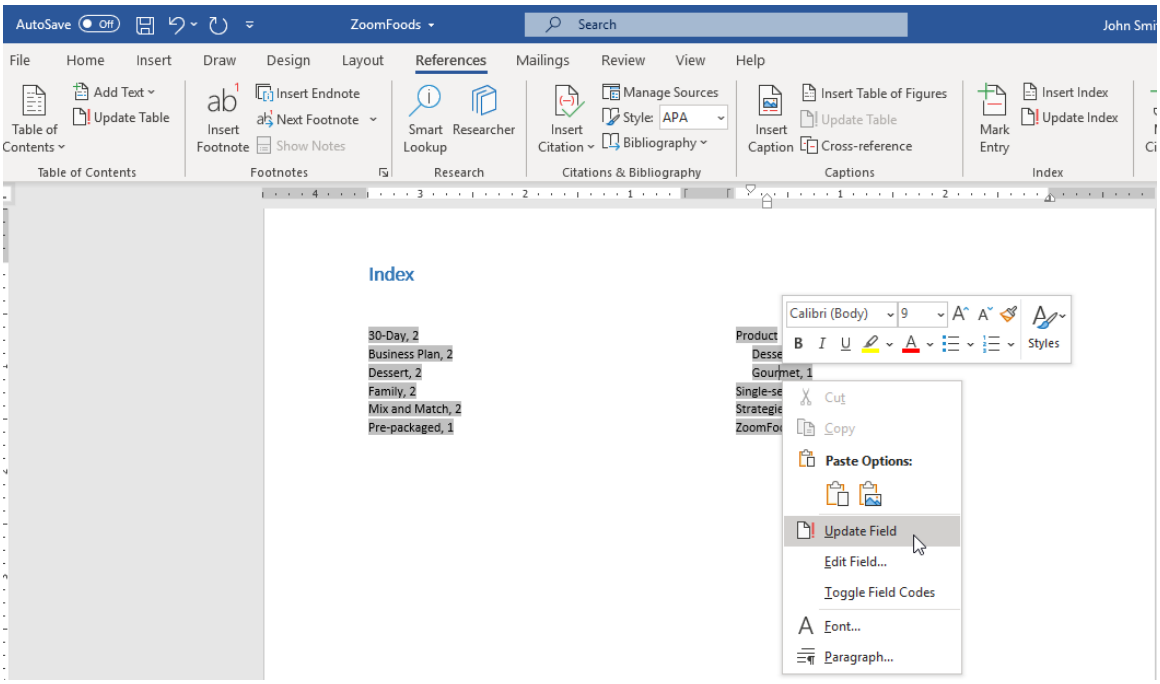
In the next section of the dialog box, you can customize **font formatting (2)** and **paragraph options (3)**. For more

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**:



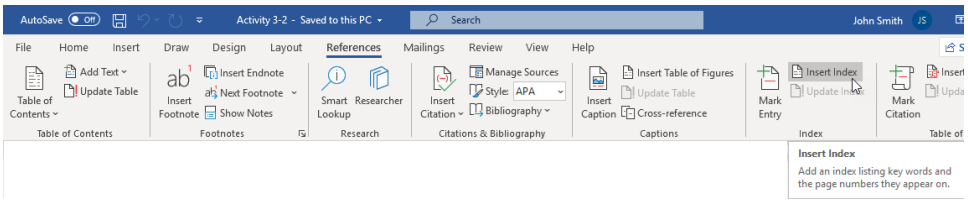
You can also use the **F9** shortcut.

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.

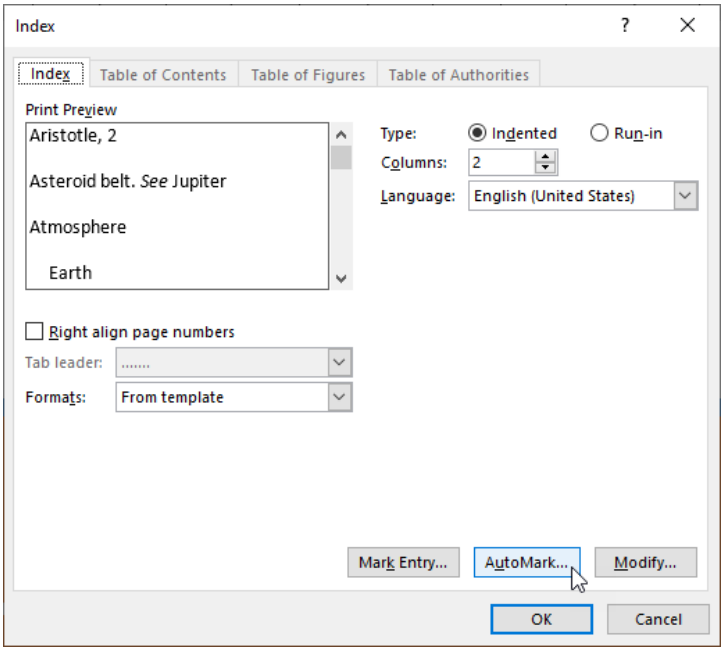
1. Open Microsoft 365 Word and open Activity 3-2:

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

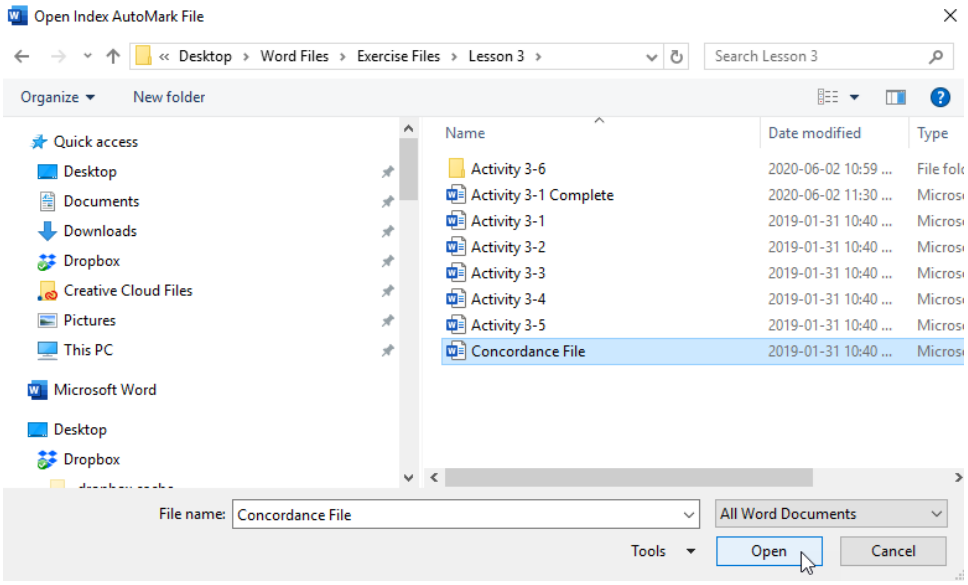


(If the command is unavailable, place your cursor on the second page of the document.)

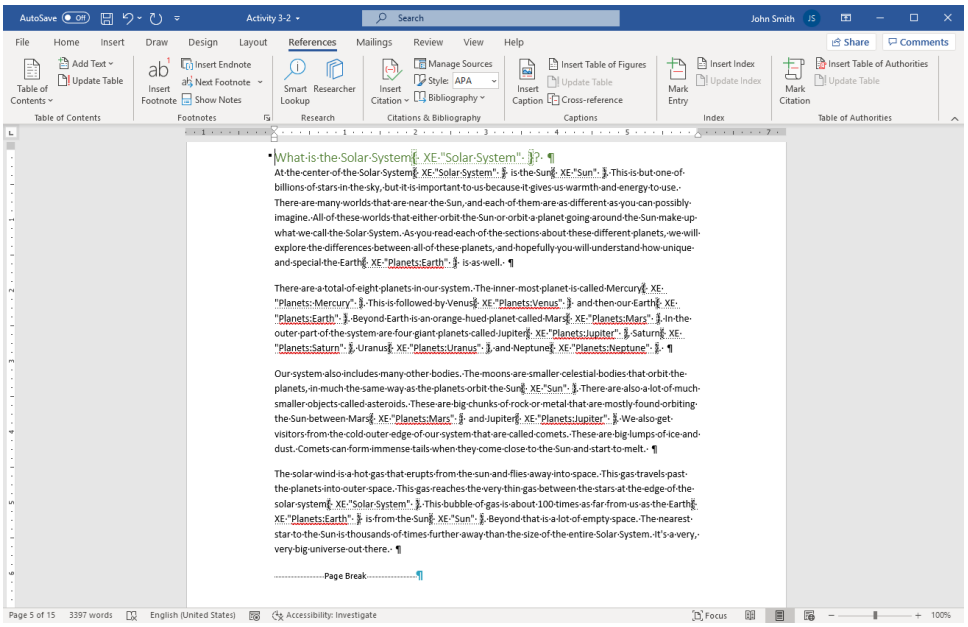
3. In the Index dialog box, click **AutoMark**:



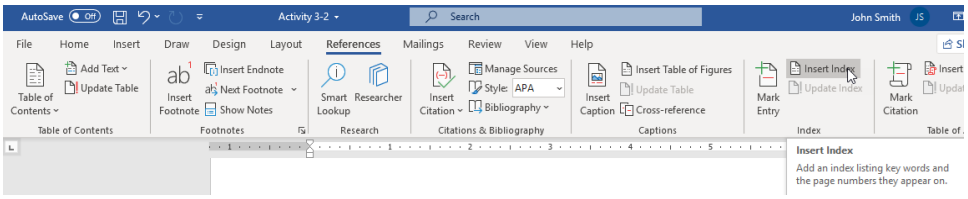
4. Navigate to Lesson 3 of your Exercise Files folder. Select the **Concordance File** document and click **Open**:



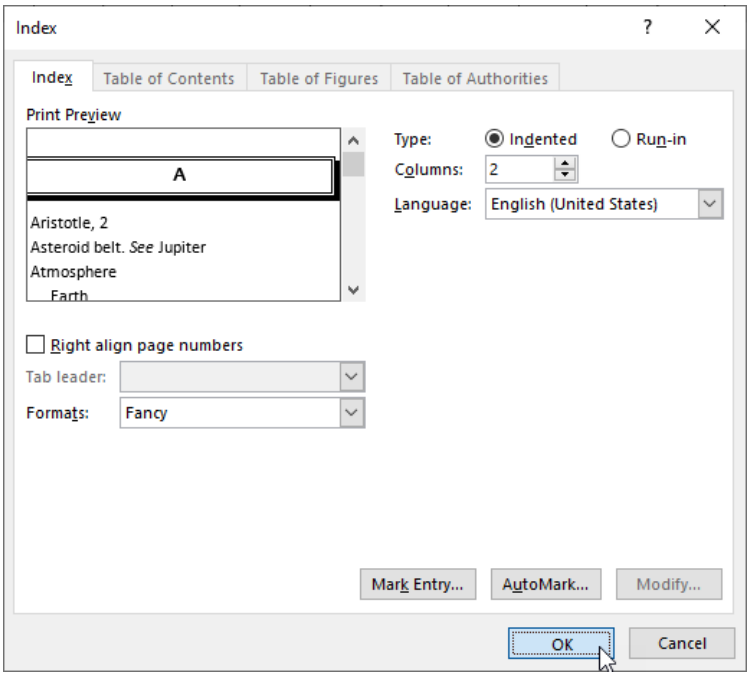
5. The index entries will be automatically marked. Scroll to page five to see some of these entries:



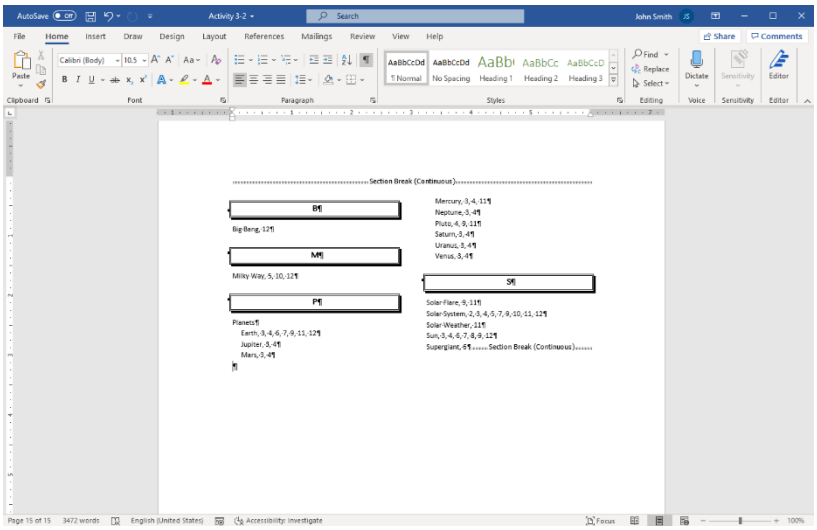
6. Now, press **Ctrl + End** to go to the end of the document. Click **References → Insert Index** again:



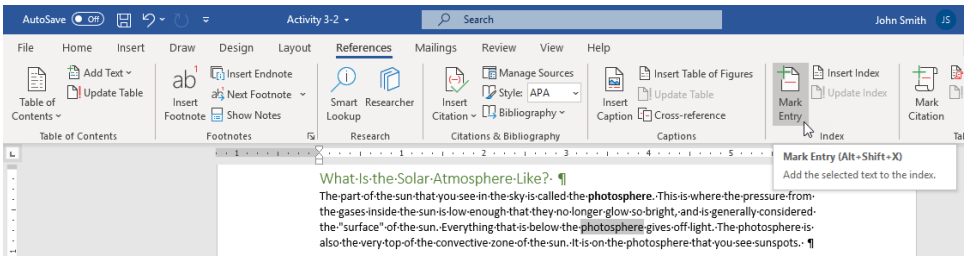
7. In the Index dialog box, choose **Fancy** from the Formats menu. Check the "**Right align page numbers**" box and click **OK**:



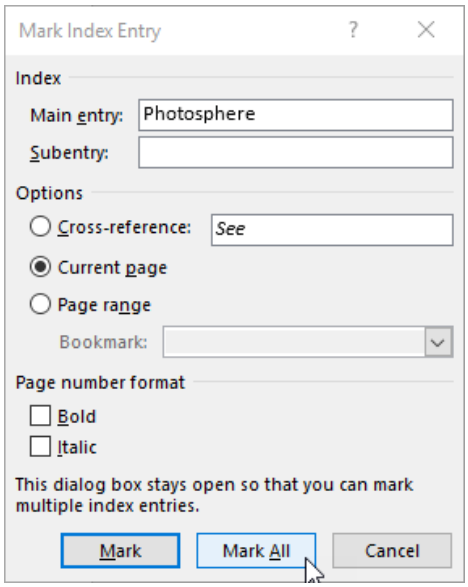
8. The index will be added:



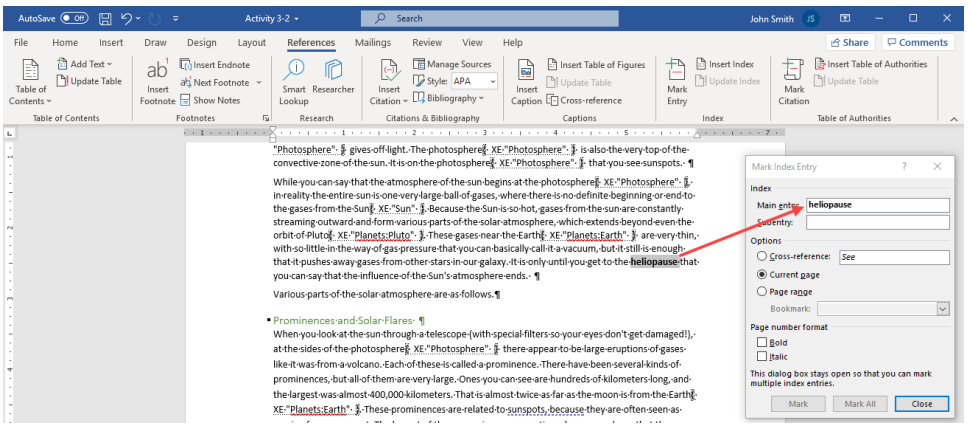
9. There are a few entries that were left out of the concordance file. Go to page 11 of the document. Select an instance of the word "**photosphere**" that is not bolded and click **References → Mark Entry**:



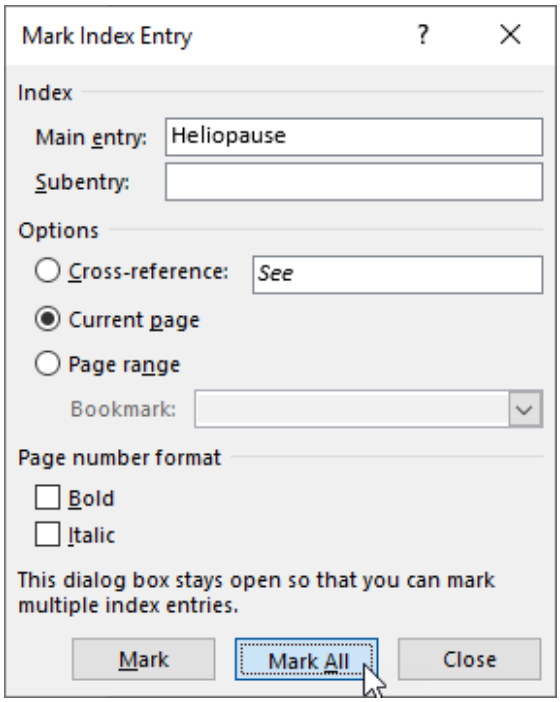
10. Capitalize the entry and click **Mark All**:



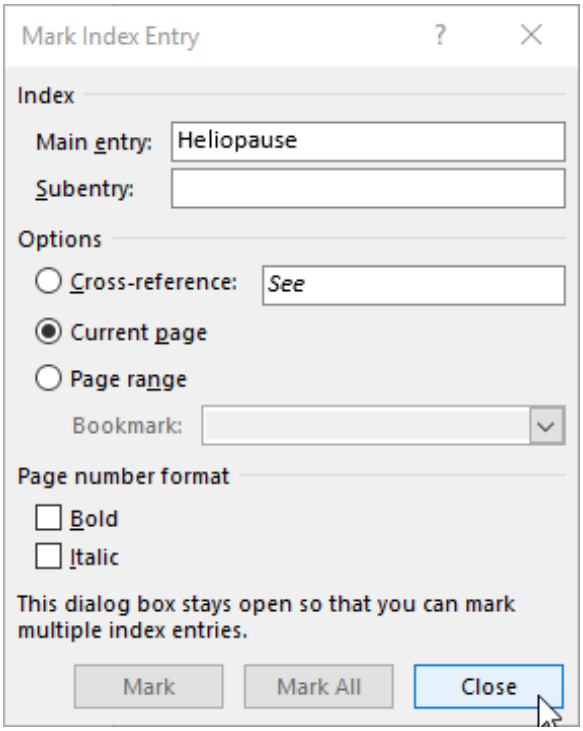
11. With the dialog box still open, select the word "**Heliopause**" and click inside the "**Main entry**" field of the Mark Index Entry dialog box:



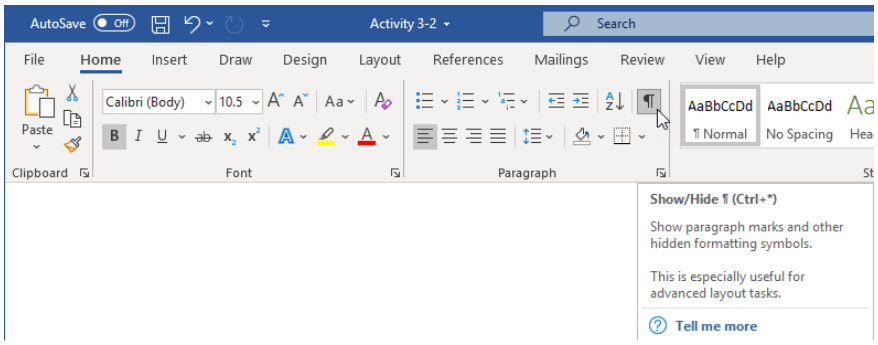
12. Inside the Mark Index Entry dialog box, select the word "**Heliopause**" and press **Ctrl + B** to remove the bold formatting. Change the "h" to a capital letter and click **Mark All**:



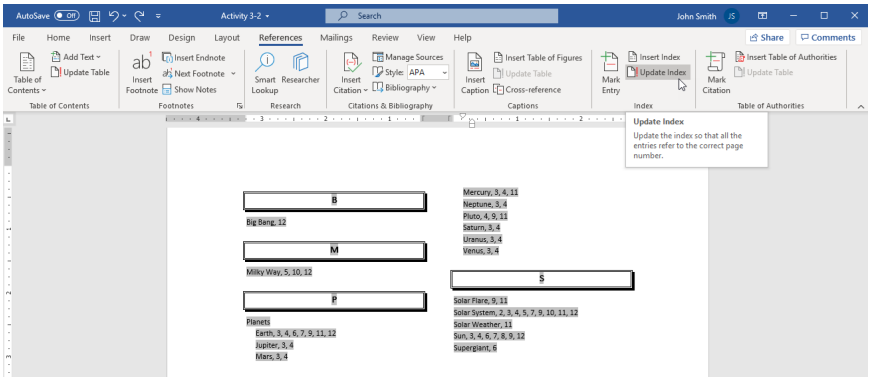
13. **Close** the Mark Index Entry dialog box:



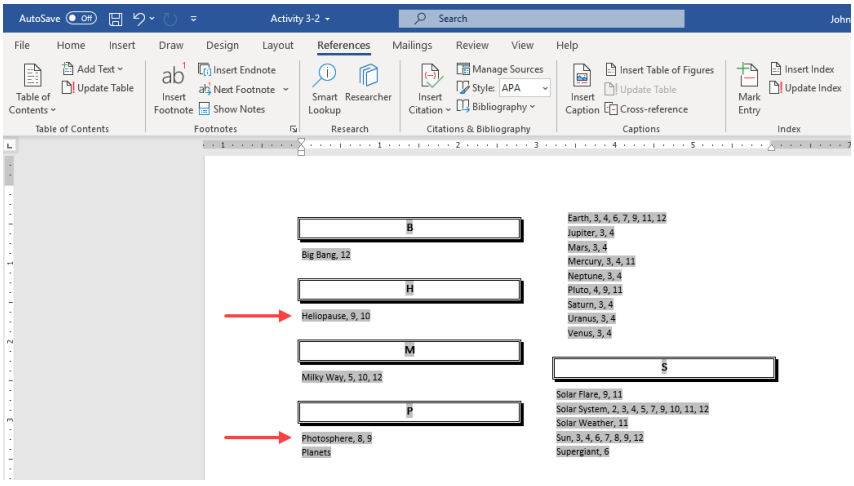
14. Click **Home → Show/Hide** to hide the formatting marks:



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



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.

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.

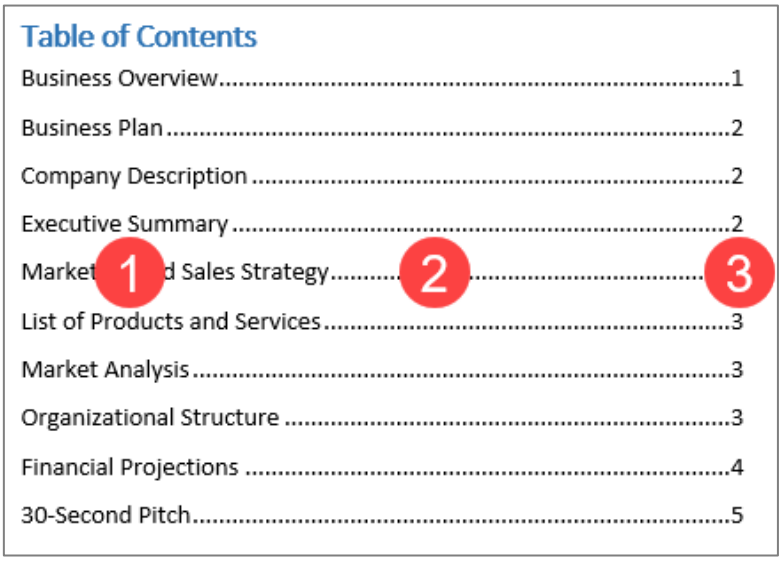
Topic Objectives

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

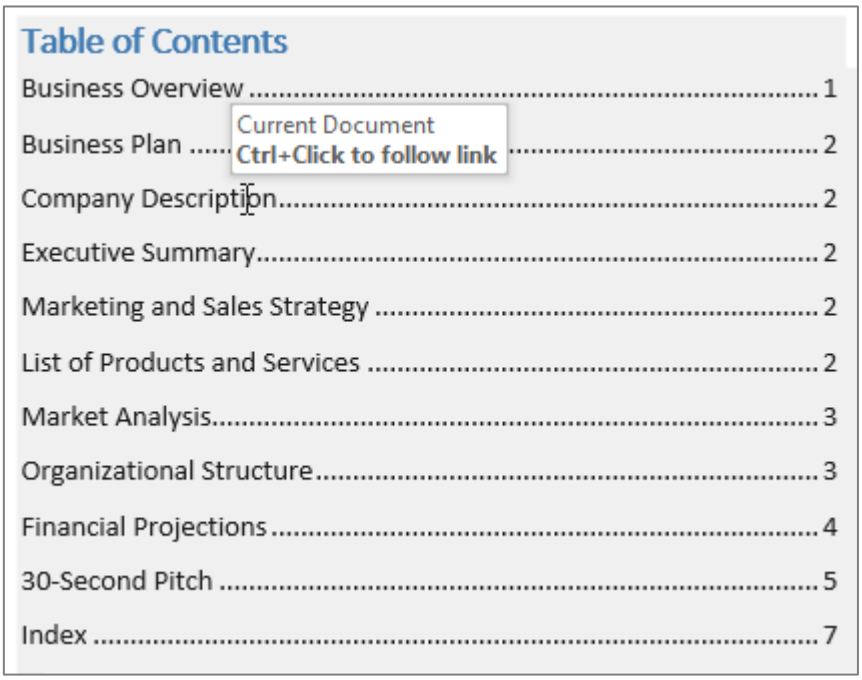
Table of Contents

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



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:

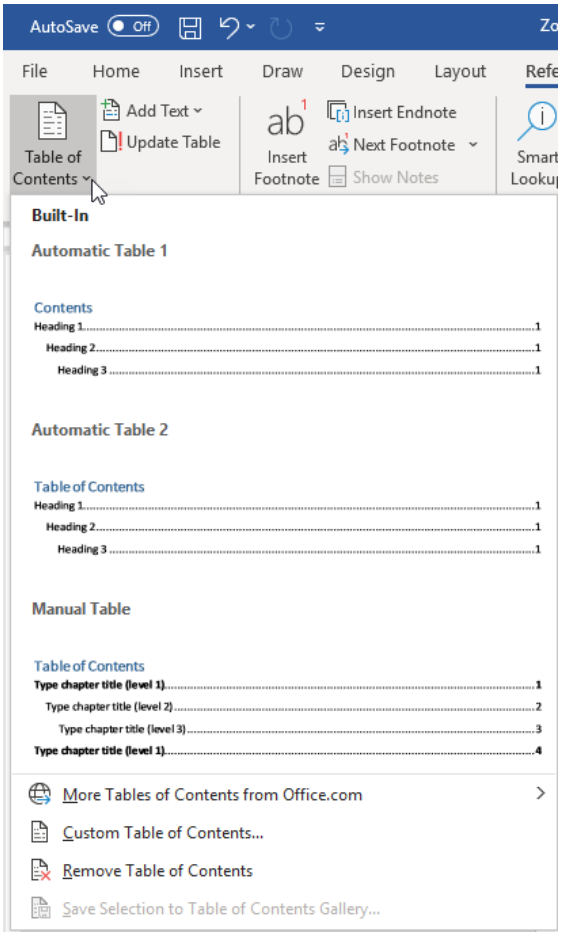


One of the key things to remember when working with tables of contents that are generated by Word is that you should never edit the table of contents itself. If you do make changes to an automatic TOC, they will be overwritten once the table of contents is updated.

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.

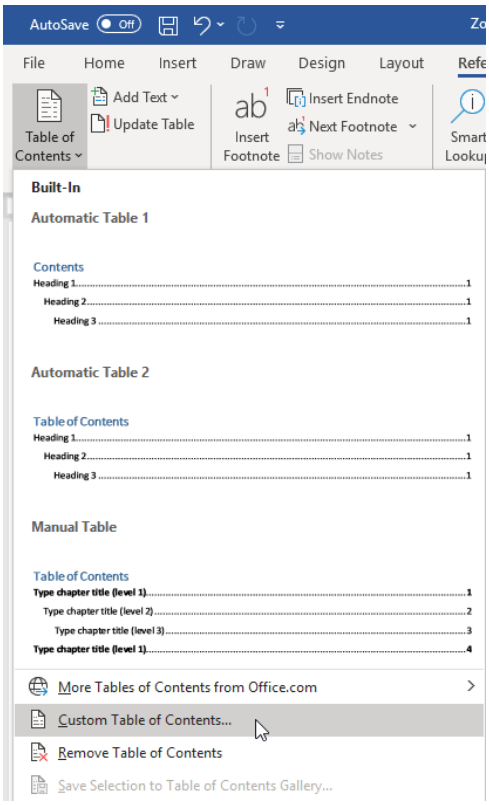
The Table of Contents Dialog Box

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:

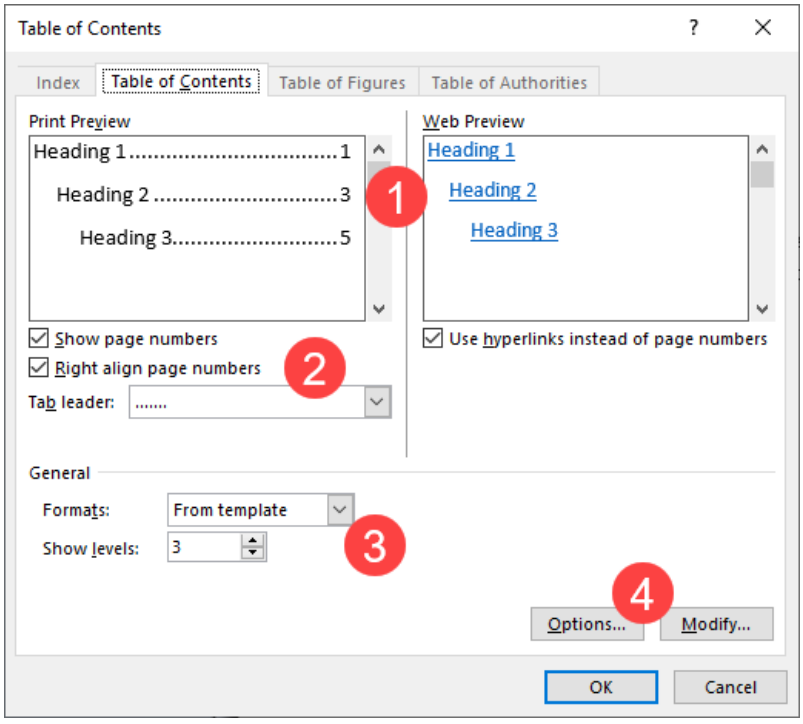


The first two entries in the menu are automatic tables, meaning that Word will change the text and page numbers to match the headings and corresponding pages in your document. The third choice, Manual Table, lets you create a table of contents where you can enter the headings yourself.

To create a custom table of contents, click **References → Table of Contents → 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:

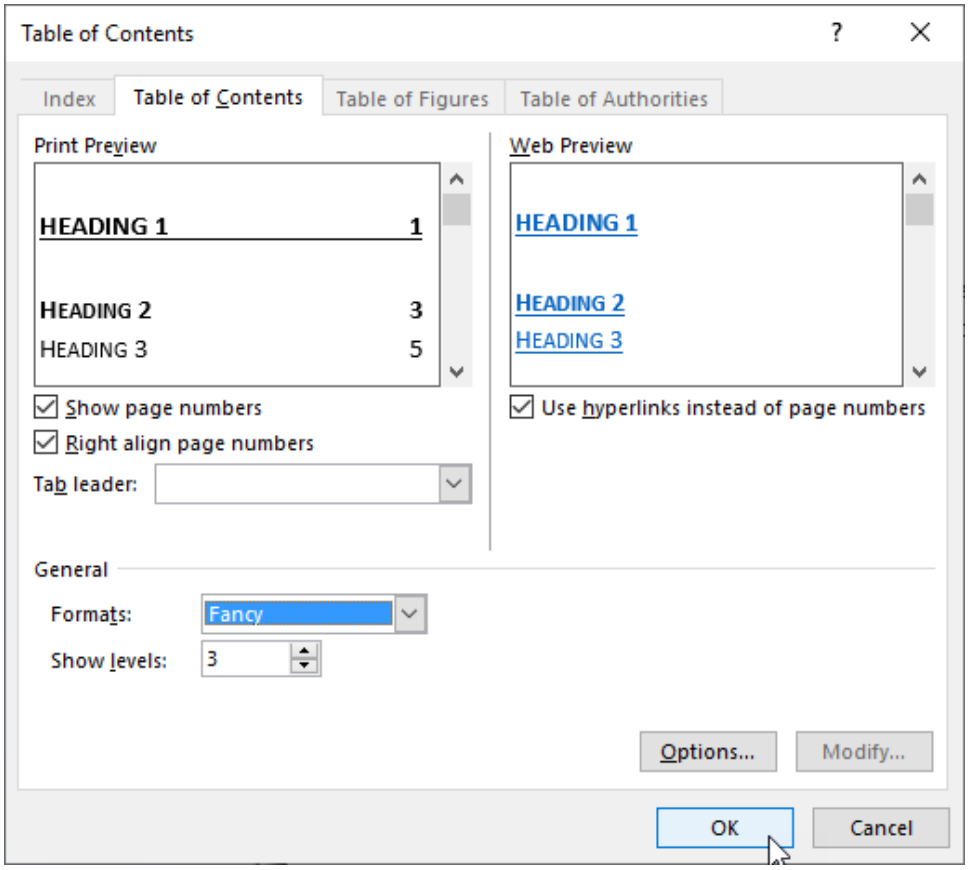


The **top part of the dialog box (1)** shows a preview of how the table of contents will look with the current settings in both print and web formats. You can **customize page number display (2)** with

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:



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

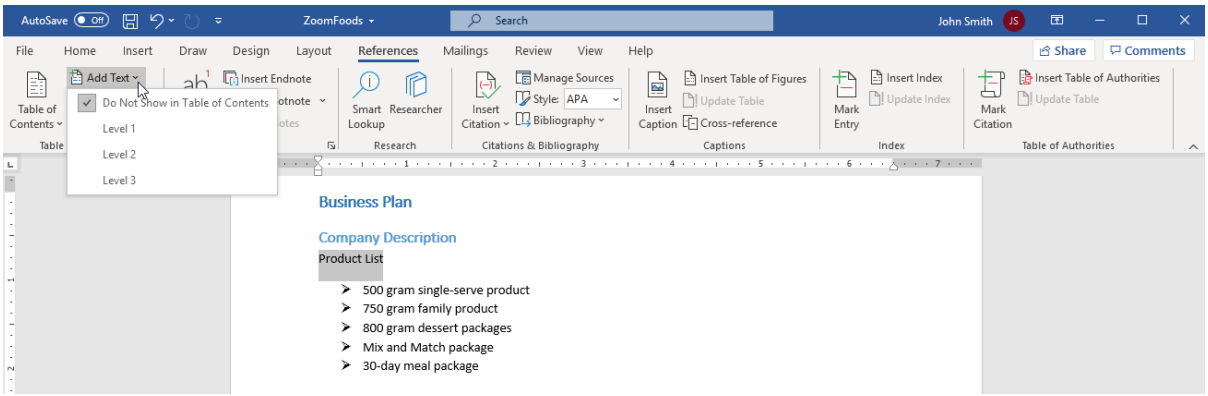
30-SECOND PITCH 5

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).

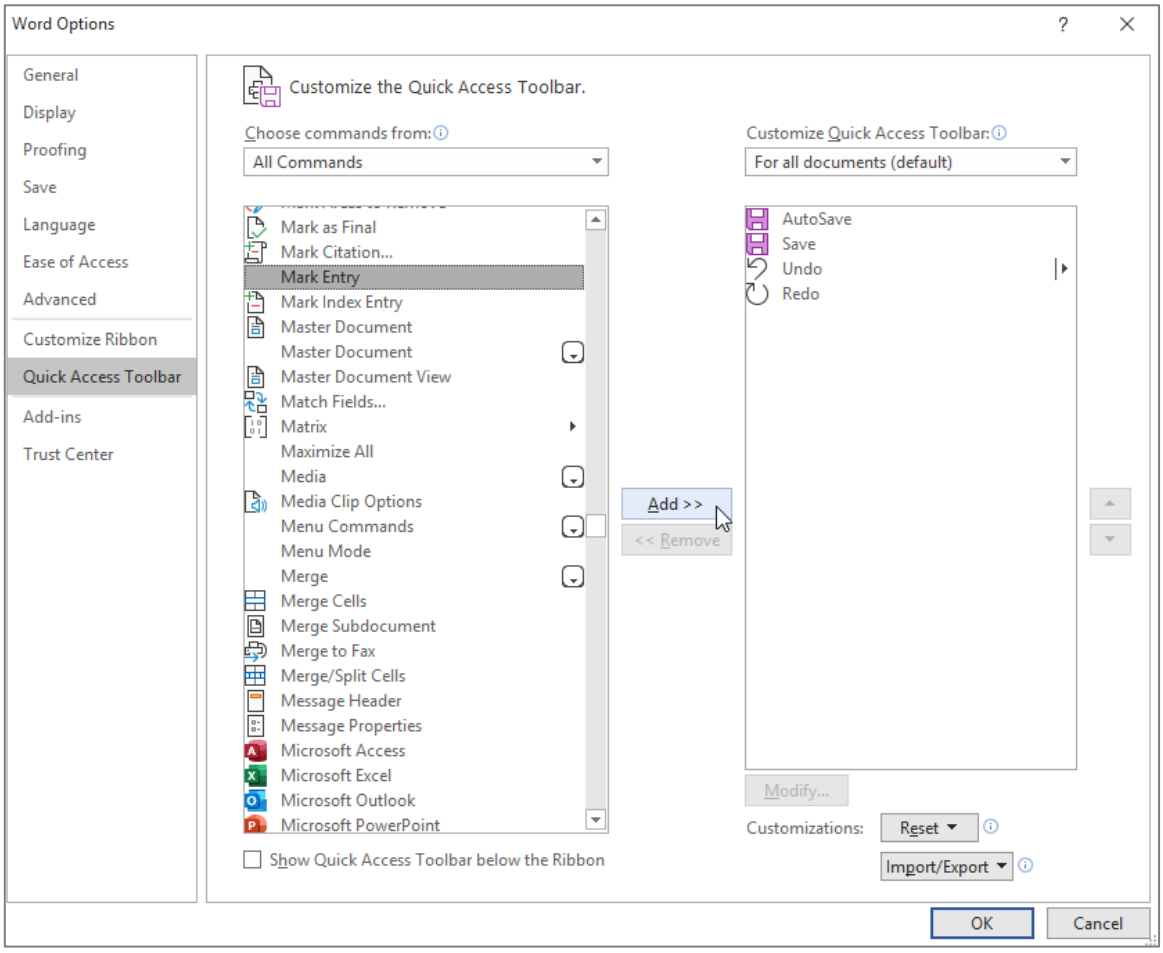
You can mark headings using the pre-defined styles available in the Styles gallery, or with the **Add Text** menu on the References tab:



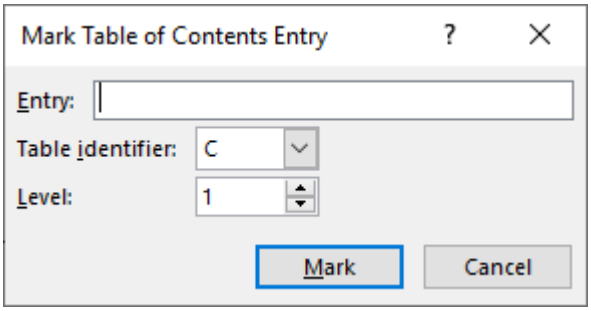
This will mark the text with the appropriate outline level and give it the proper heading formatting.

The Mark Table of Contents Entry Dialog Box

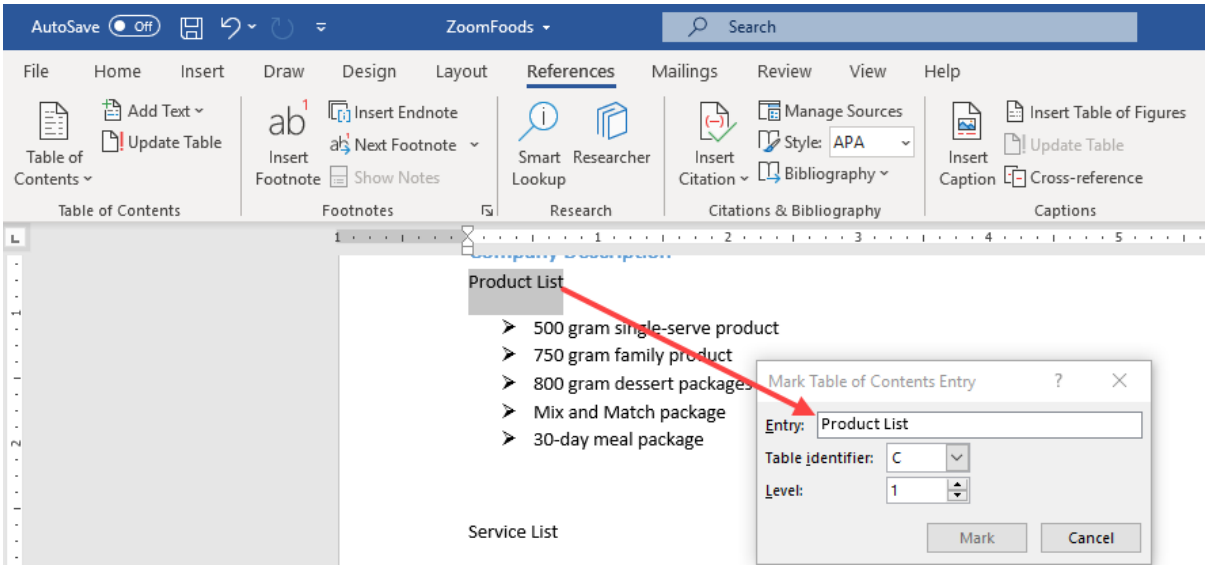
You can also use the Mark Table of Contents Entry dialog box to mark entries for tables of contents. To access this dialog box, you can add its command to the Quick Access toolbar or a custom ribbon tab via the **Word Options** dialog box:



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

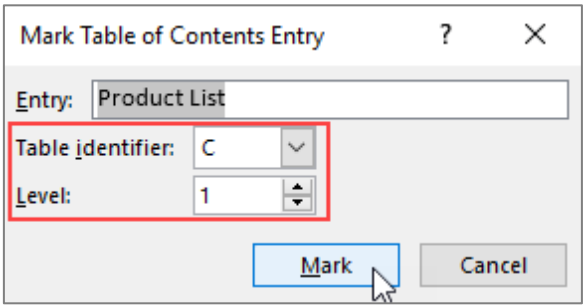


First, select the document text that you want to include in the table of contents. Then, click in the **Entry** field to place it there:

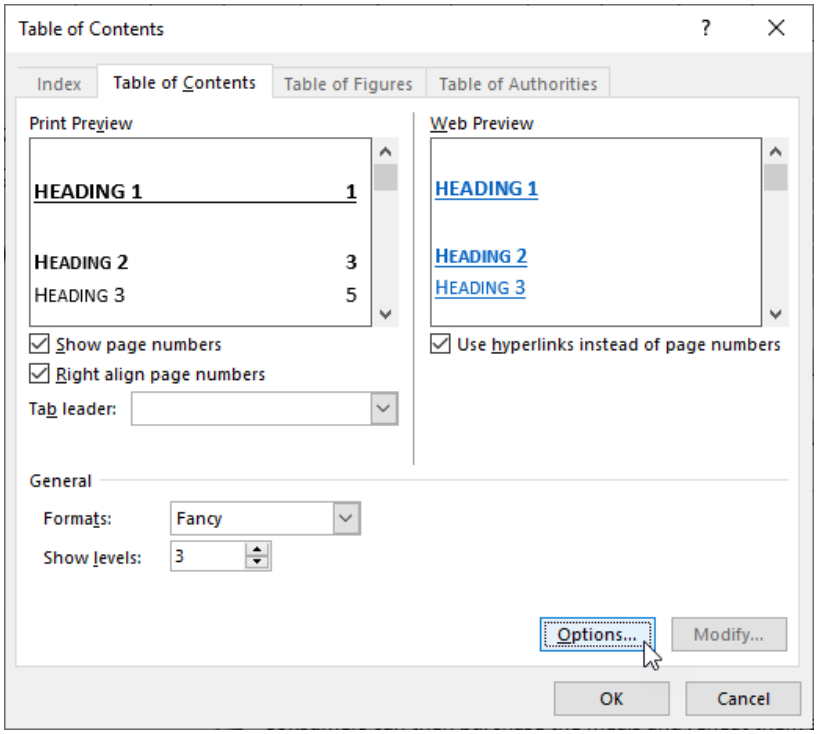


Like the Mark Index Entry dialog box, the text will keep the formatting and capitalization from the document. However, you can modify it as necessary.

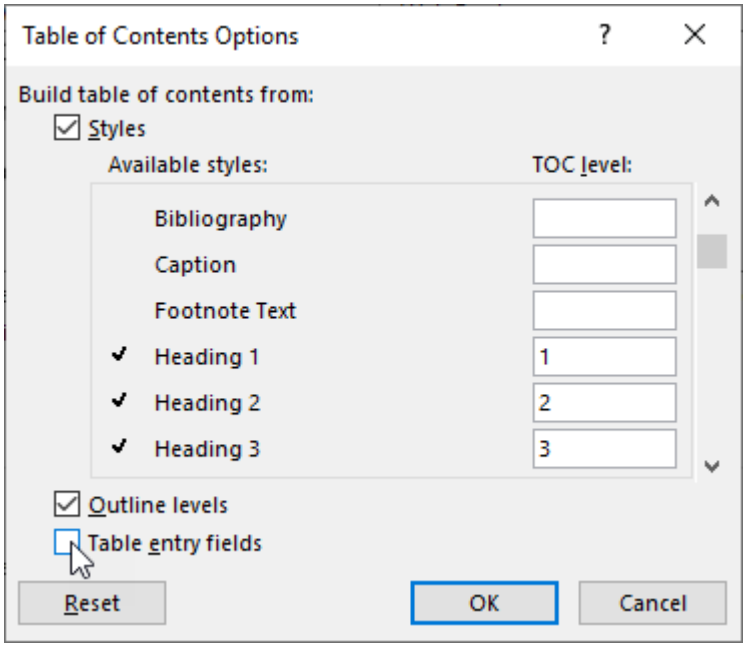
Next, make sure the "**Table identifier**" field is set to C. Set the desired level and click **Mark**:



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



In the Table of Contents Options dialog box, ensure that "**Table entry fields**" is checked and click **OK**:

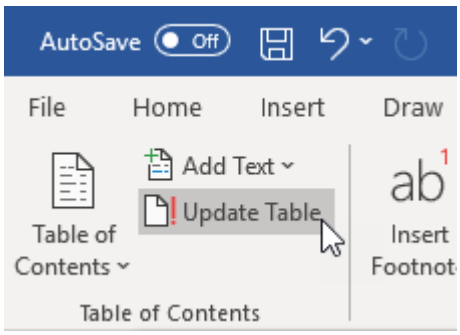


Click **OK** in the Table of Contents dialog box and click **OK** to replace the current table (if prompted). The table entry fields in the document will then be added to the TOC.

Updating a Table of Contents

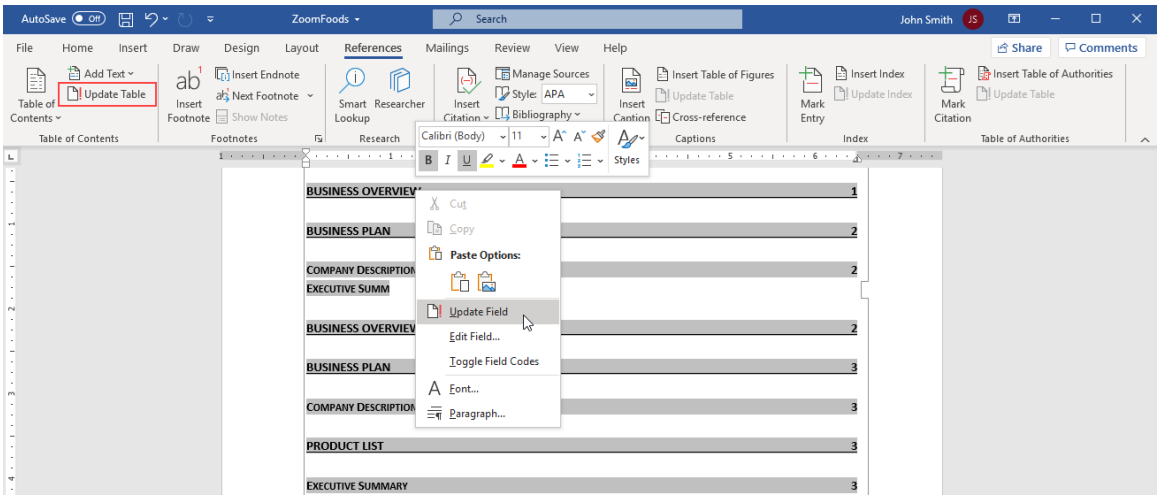
Perhaps the most useful feature when working with an automatic table of contents in Word is the Update Table command. This command will update your table of contents to reflect any changes that you have made to your document. You can update your TOC at any time.

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:



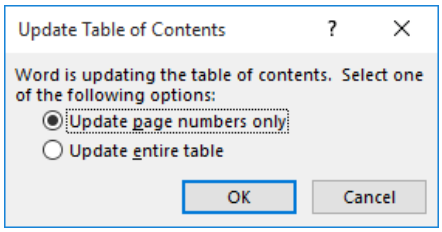
(This command will not be available for all tables of contents.)

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:



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:



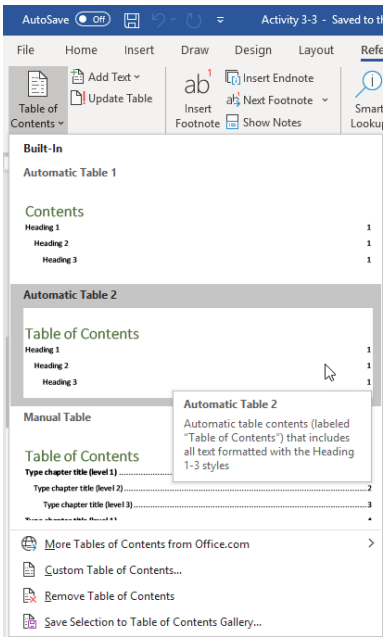
If you have just made changes that affect page numbering, choose the first option. If you have added or removed headings, choose the second option. (If you are not sure, you can safely use the "Update entire table" option whenever you like.) Once you click **OK**, the table will be updated in the specified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

Activity 3-3: Inserting a Table of Contents

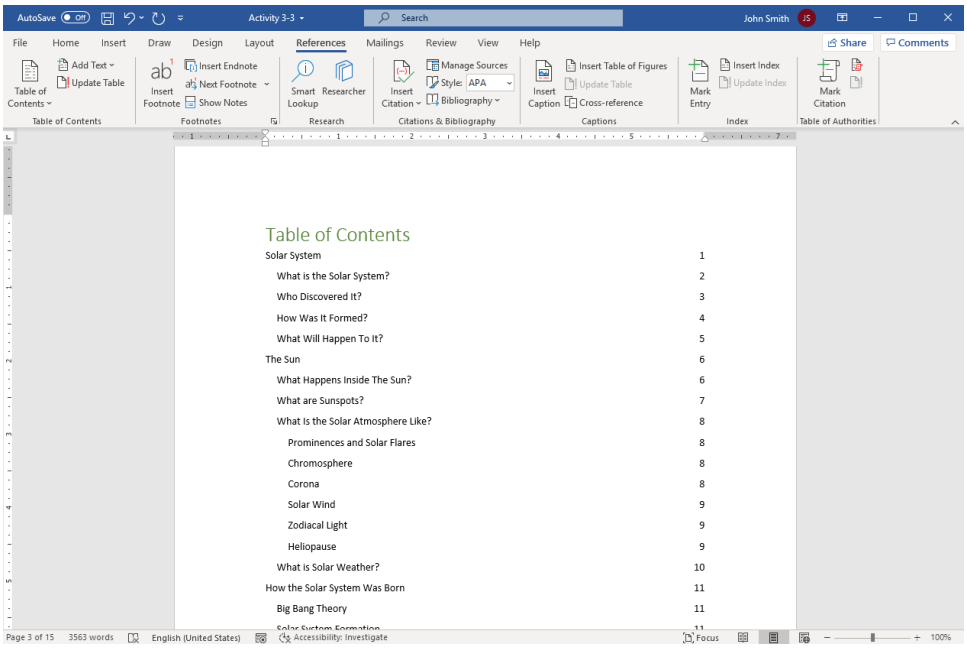
In this activity, you will add a table of contents to a document. Note that when we refer to a page number, we are referring to the physical location of the page, not the formatted number that appears on the page.

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

2. Go to the third page of the document and click to place your cursor there. Click **References → Table of Contents → Automatic Table 2**:

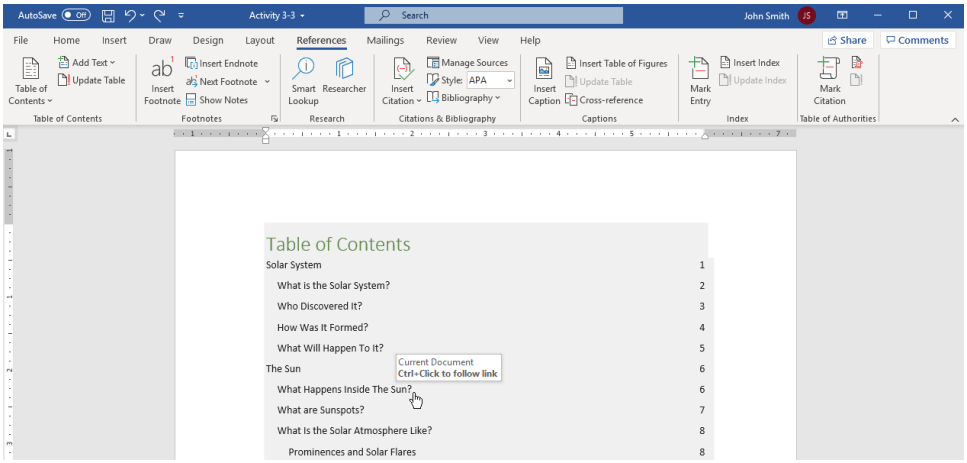


3. The table of contents will be inserted. Since this document uses headings, most of the work will be done automatically:

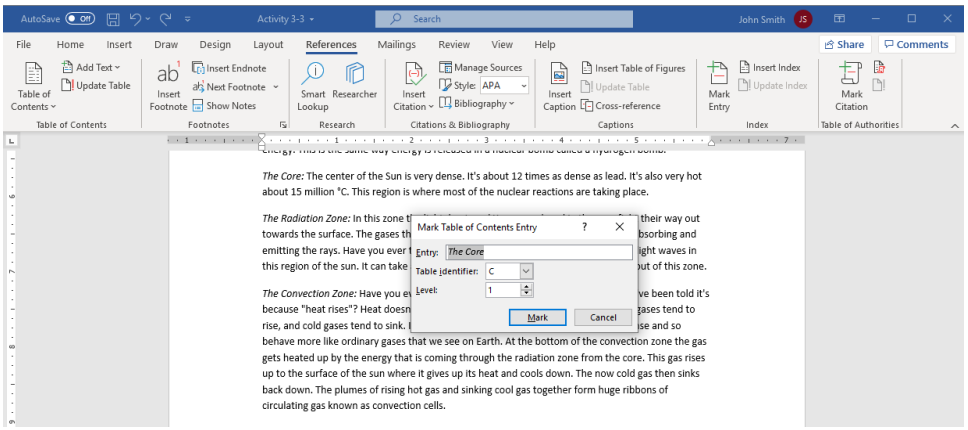


(You may need to scroll up to see the entire table.)

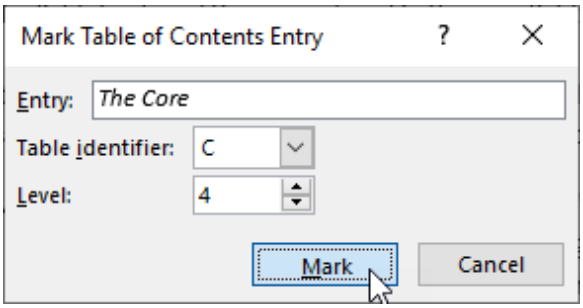
4. There are a few more entries that we need to add manually. Hold the Ctrl key and click the "**What Happens Inside the Sun?**" link to go to that page:



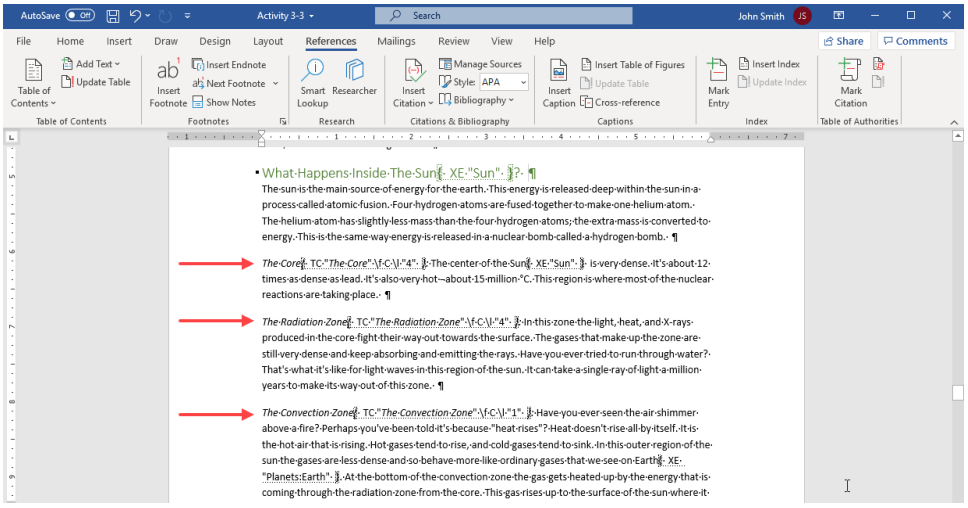
5. Scroll down a bit so that you can see the bottom half of the page. Select the text “The Core” and press **Alt + Shift + O** to open the **Mark Table of Contents Entry** dialog box:



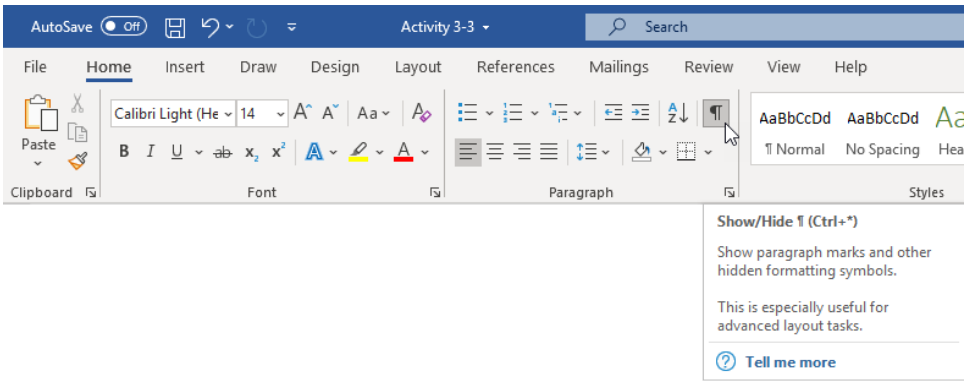
6. Change the level to “4” and click **Mark**:



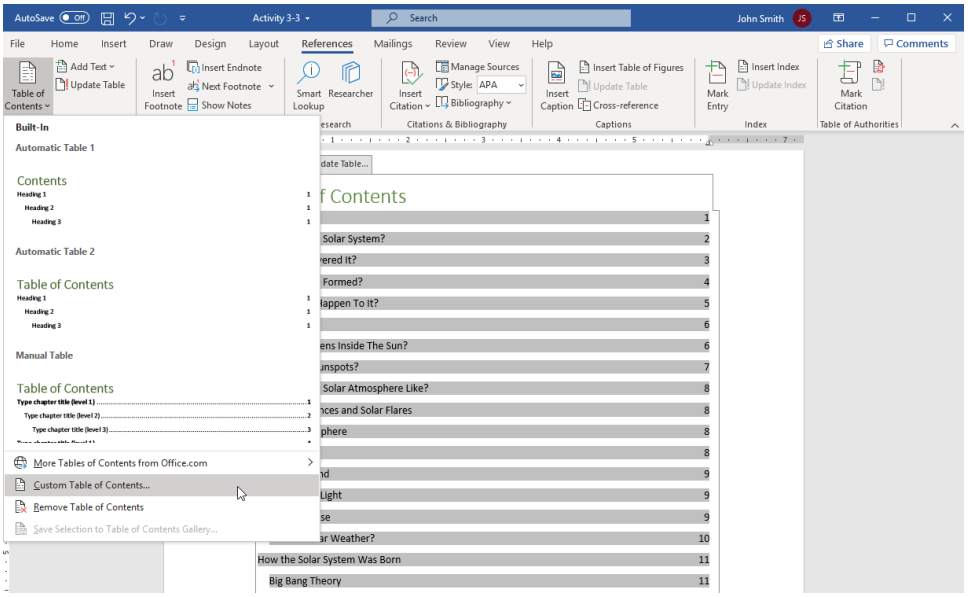
7. Repeat Step 6 to mark two more entries on the same page: “**The Radiation Zone**” and “**The Convection Zone**.” Close the Mark Table of Contents Entry dialog box when you are finished:



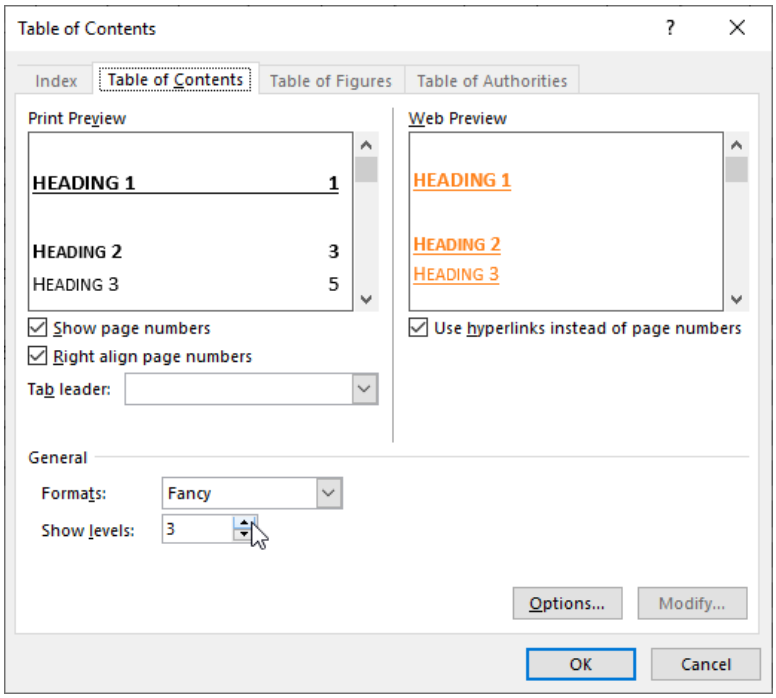
8. Hide the formatting marks in the document by clicking **Home → Show/Hide**:



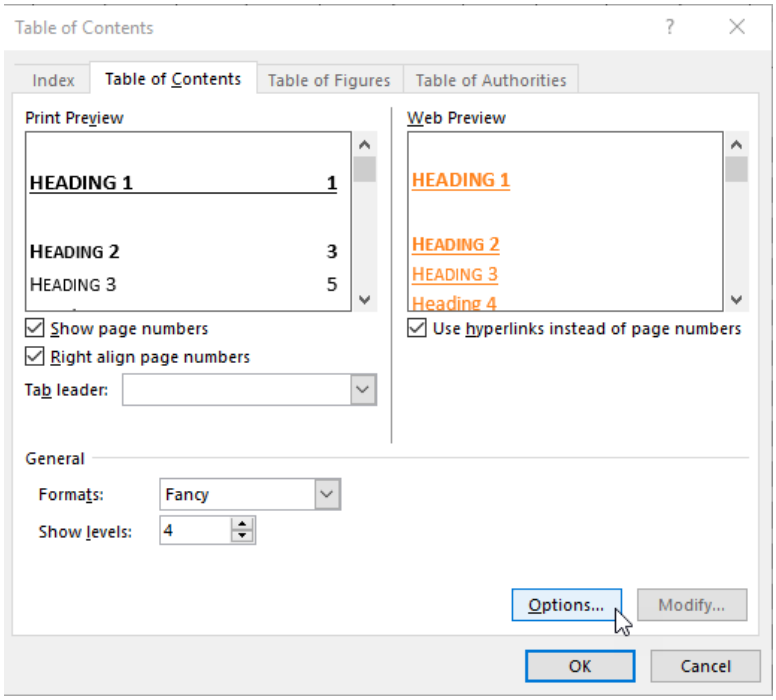
9. Go back to the third page in the document, which contains the table of contents. **Select the table**. Then, click **References → Table of Contents → Custom Table of Contents**:



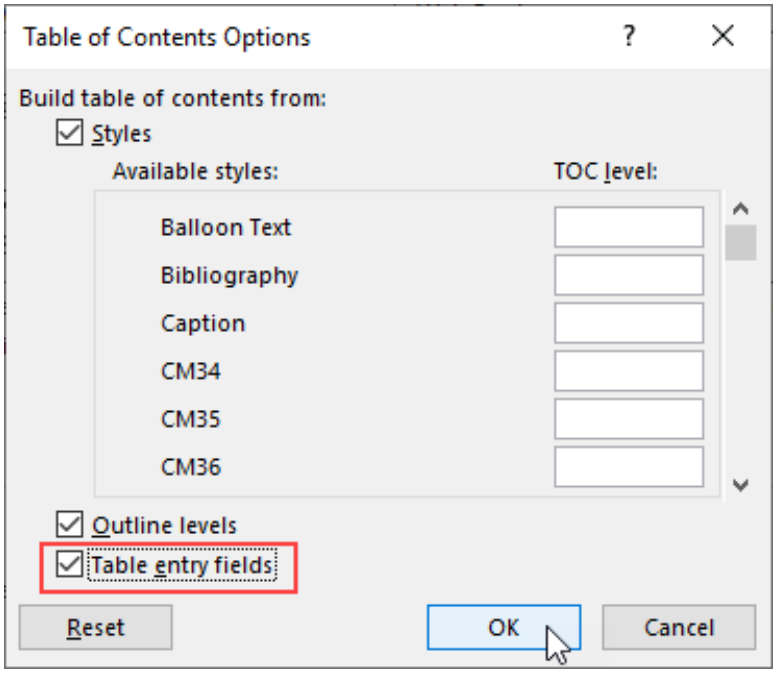
10. In the Table of Contents dialog box, click the **up arrow** next to the "Show levels" field to increase the value to **4**:



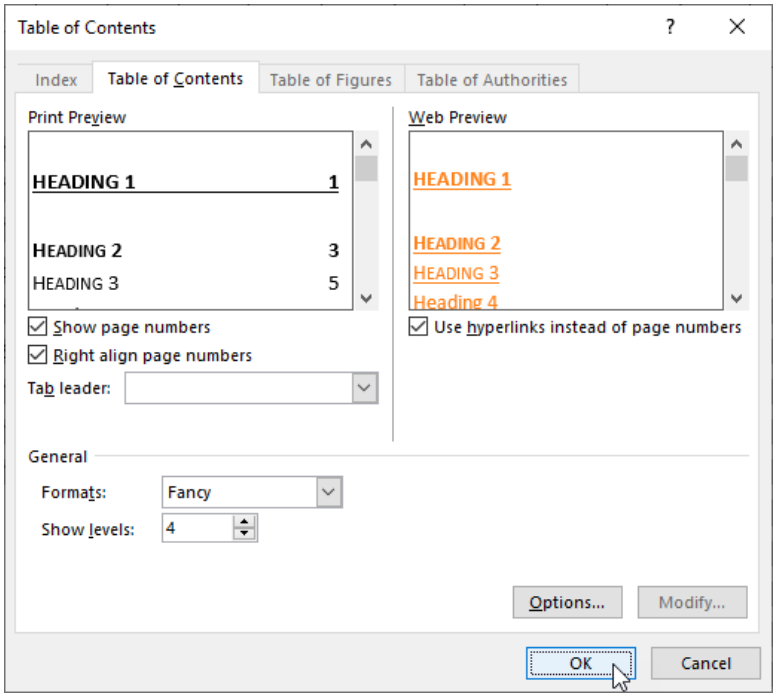
11. Next, click the **Options** button:



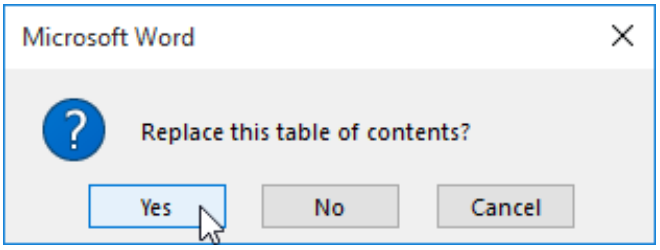
12. In the Table of Contents Options dialog box, check the "**Table entry fields**" box and click **OK**:



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

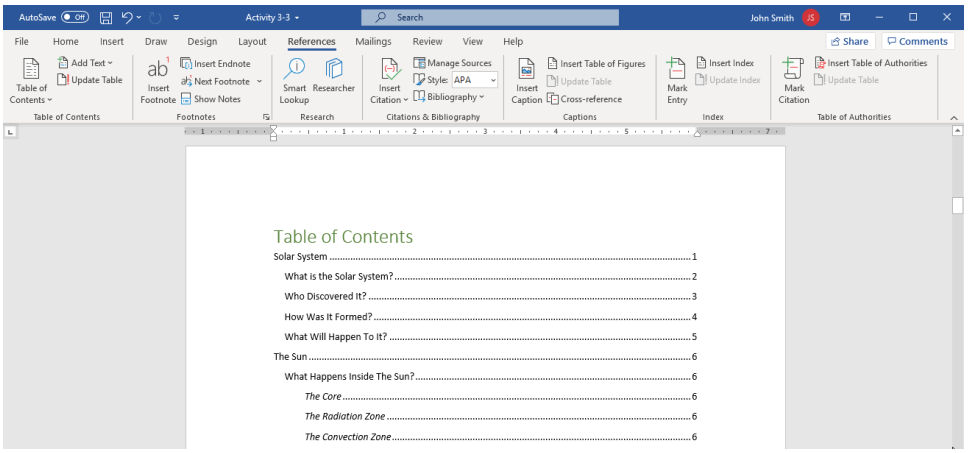


14. Click **Yes** if you are prompted to replace the existing TOC:



(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:



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

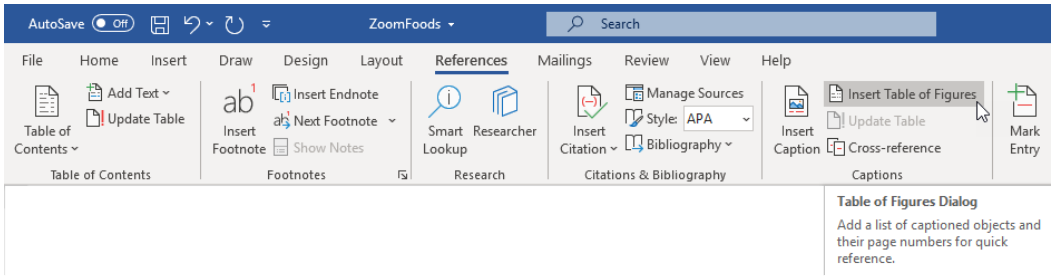
Ancillary Tables

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

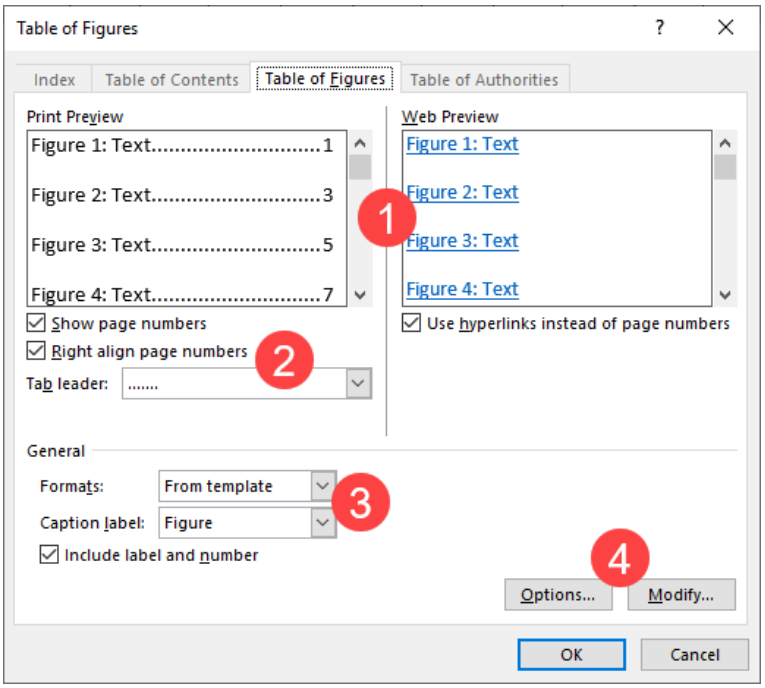
- A **table of figures** lists all of the graphics, equations, and tables in a document. (However, for a figure to be recognized by Word as such, it must have a caption.)
- A **table of authorities** lists the cases, statutes, and other references in a legal document.

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 → Insert Table of Figures:



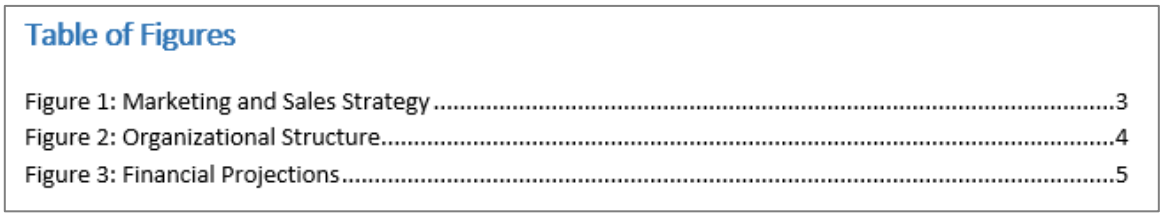
The **Table of Figures** dialog box will appear:



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 **pre-defined 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:

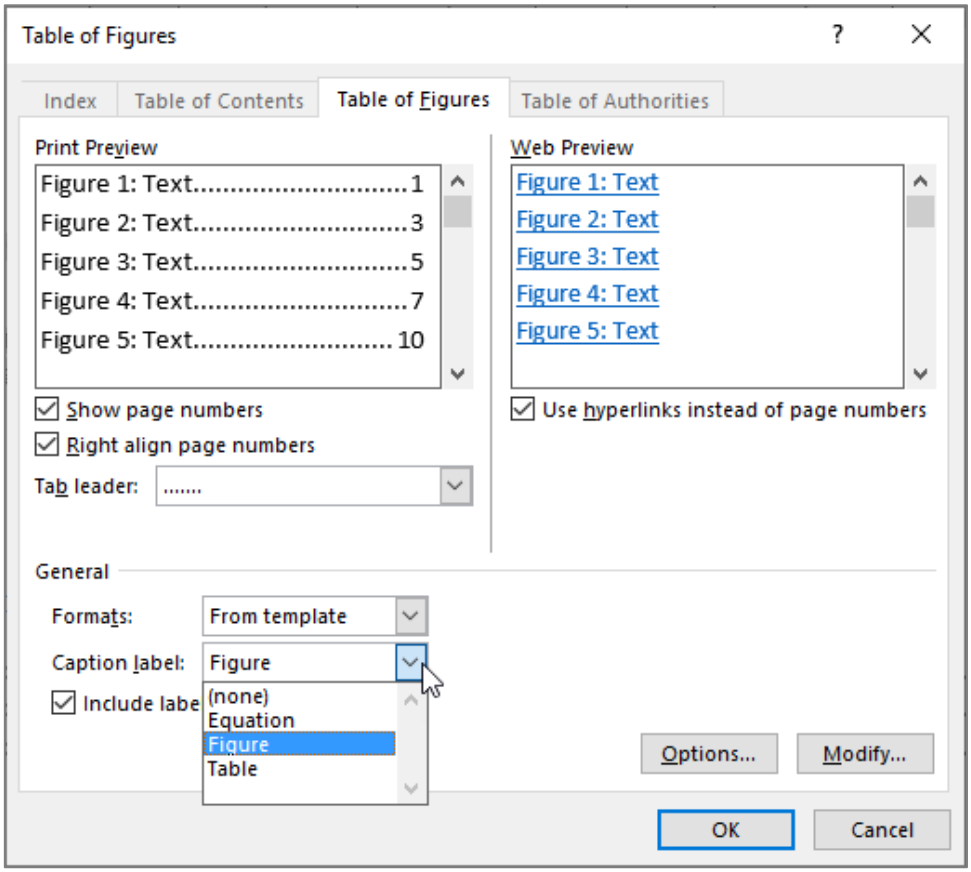
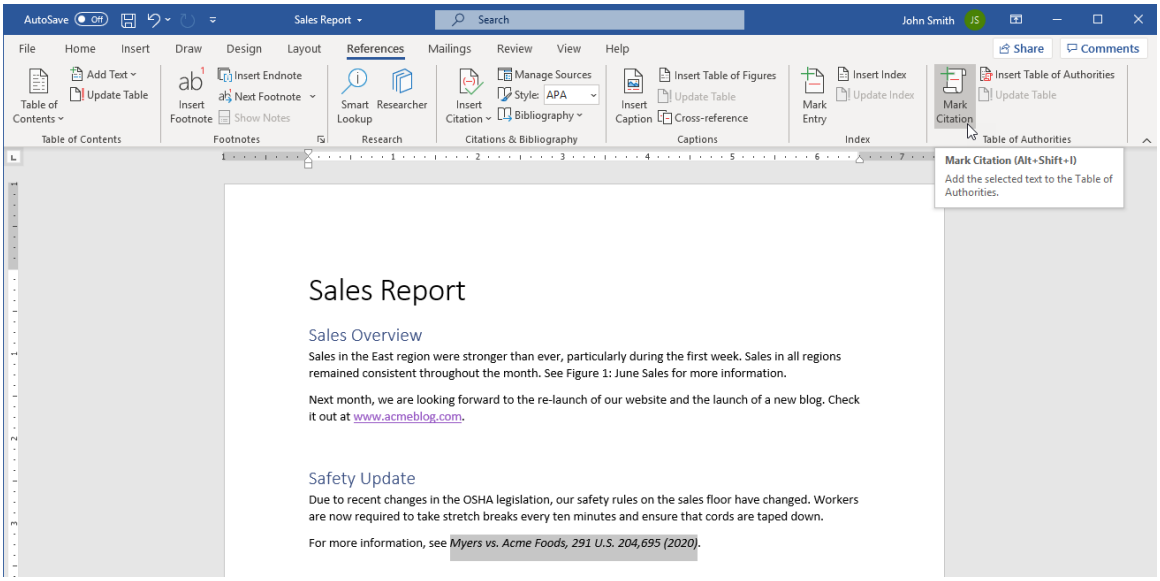


Table of Authorities

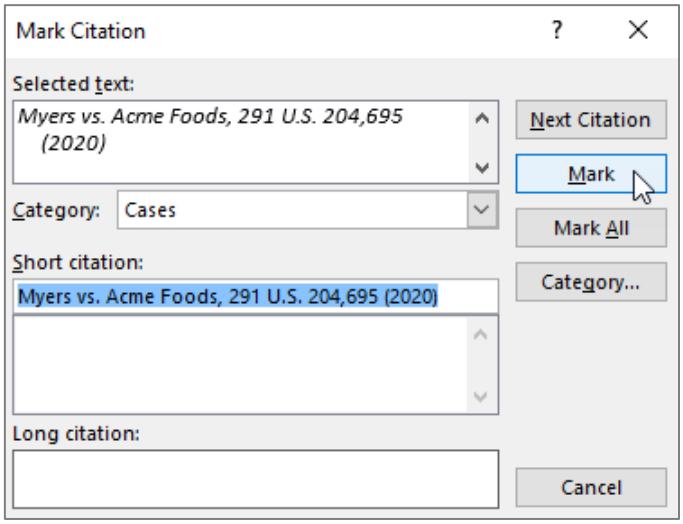
You will often find a **table of authorities** in legal documents. It lists the cases, statutes, and other authorities used in the document, as marked by legal citations.

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 → Mark Citation:



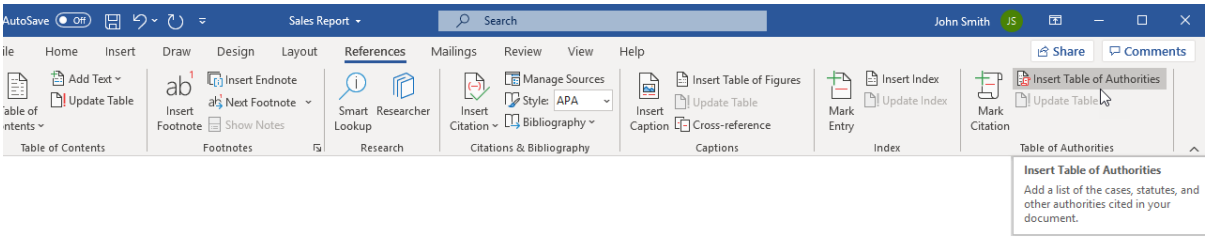
You will then see the Mark Citation dialog box appear. Make the necessary changes to the “Short citation” field and make sure that you have the proper category selected from the Category menu. Then, click **Mark**:



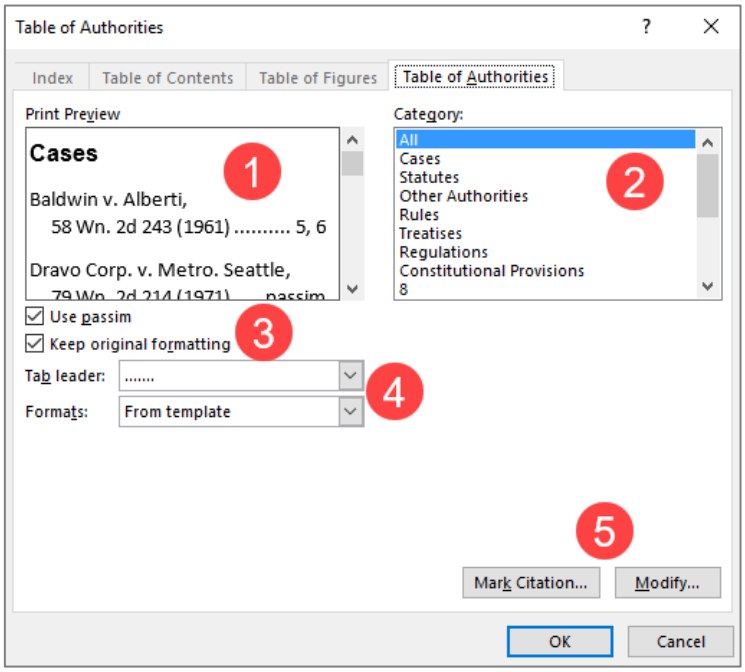
You can then close the dialog box or mark more citations.

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:



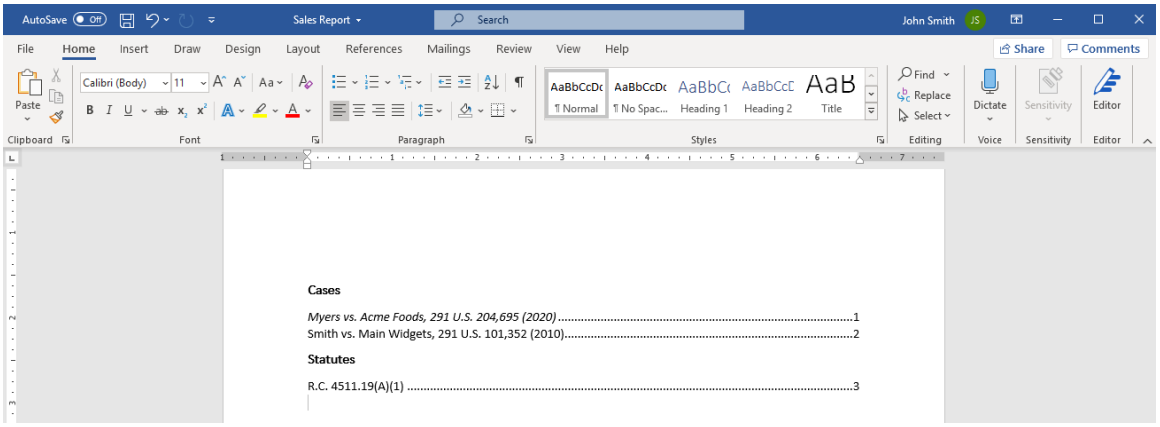
This dialog box is very similar to the others that we have encountered. In the top left of the dialog box **(1)**, you will see a **preview** of how the table will look with the current settings. In the top right, you can choose what **reference types** to include in the table **(2)**.

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.

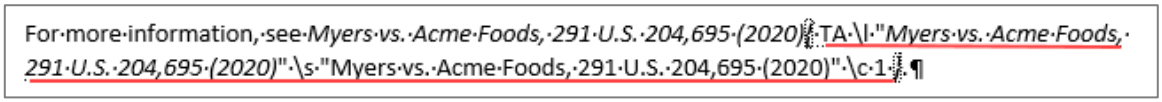
The table of authorities will appear at the specified location. A separate table will be created for each type of citation in the document:



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.

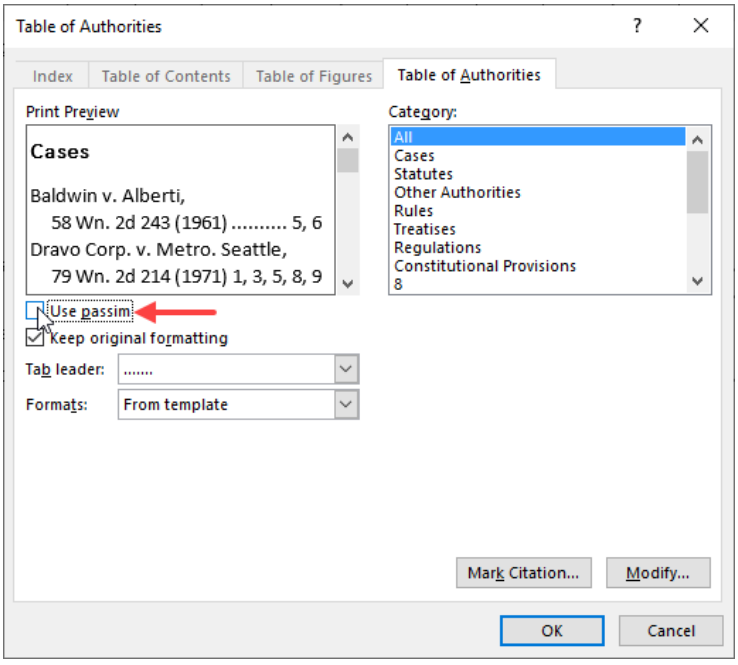
Field Code for a Marked Citation

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



"Use Passim" Option

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



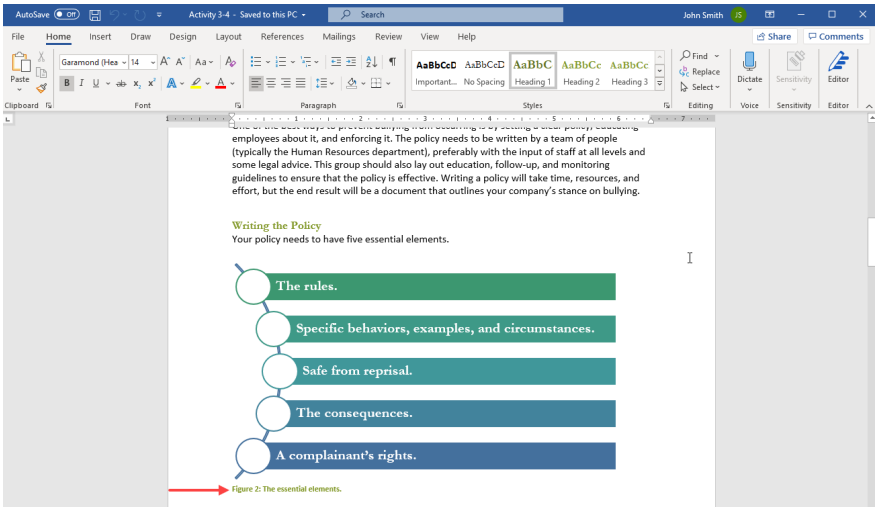
This option is set by default and will use the word "passim" in place of page numbers in a table of authorities if a case is referenced more than five times in the document.

Activity 3-4: Inserting Ancillary Tables

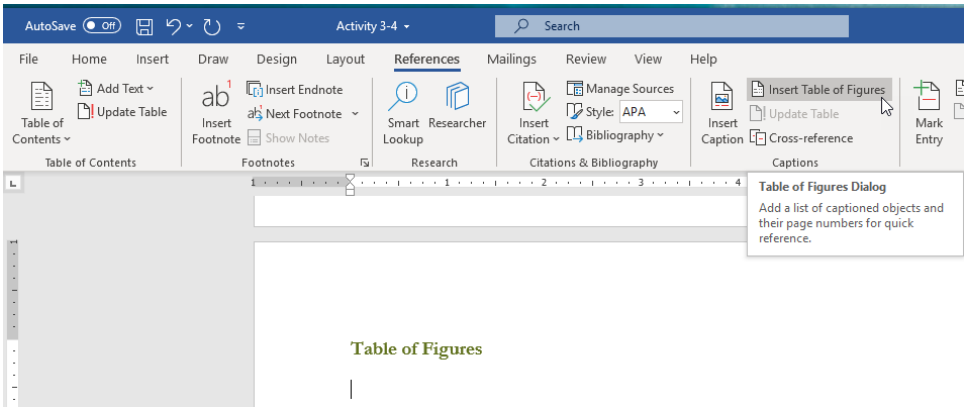
In this activity, you will add a table of figures and a table of authorities to a document.

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

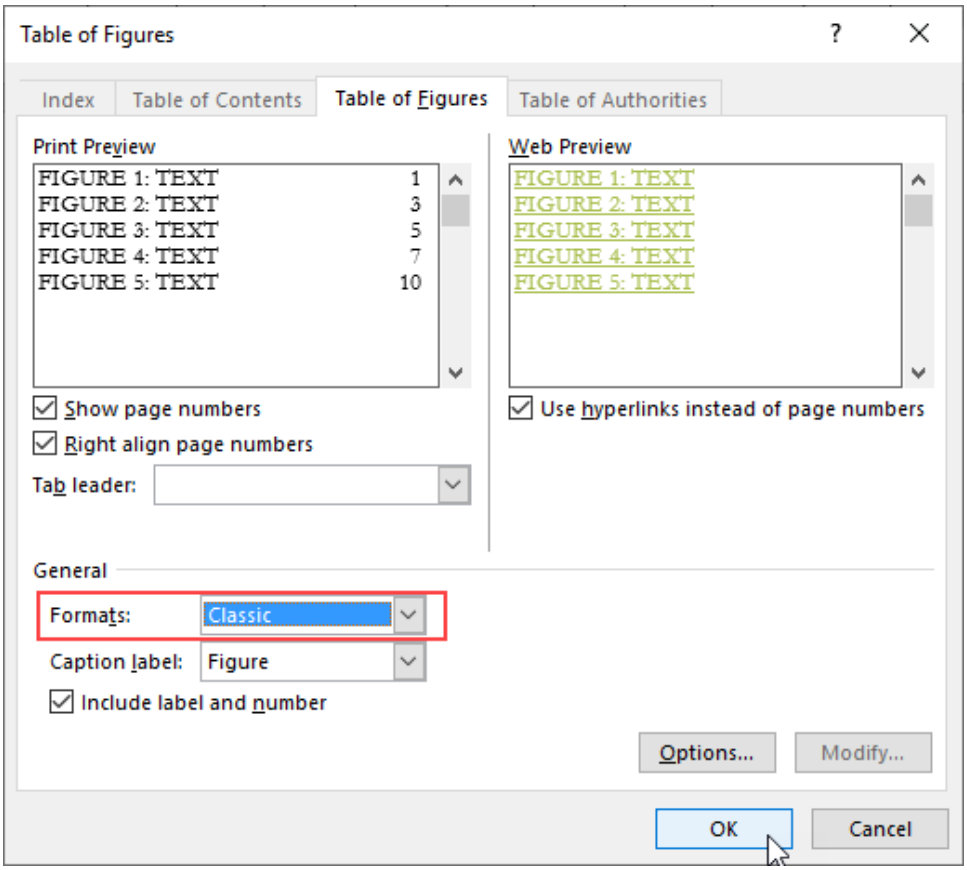
2. Scroll through the document. You can see that there are a number of diagrams that have captions:



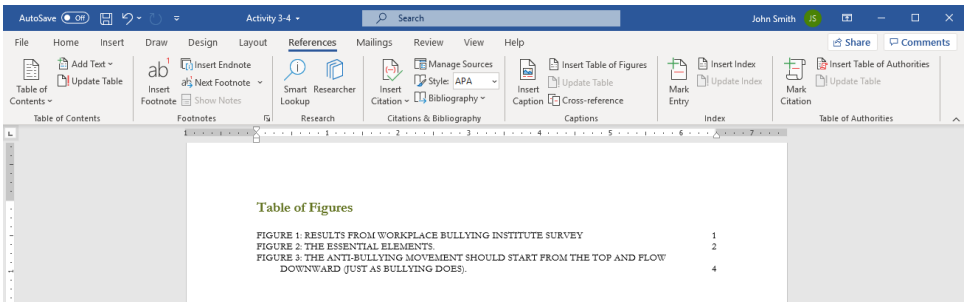
3. Go to the end of the document. Place your cursor below the title "Table of Figures." Click **References → Insert Table of Figures**:



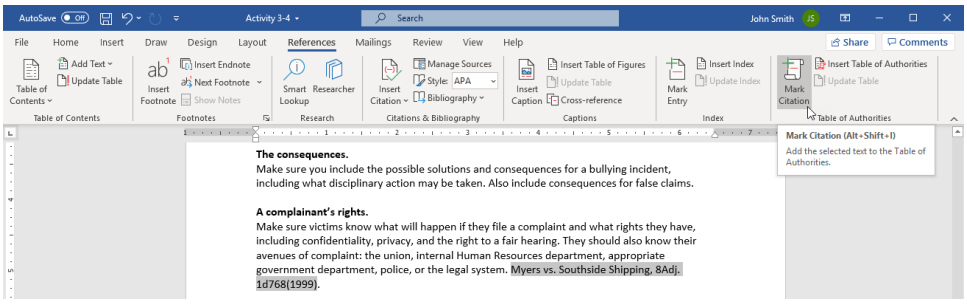
4. Choose "**Classic**" from the Formats menu. Click **OK**:



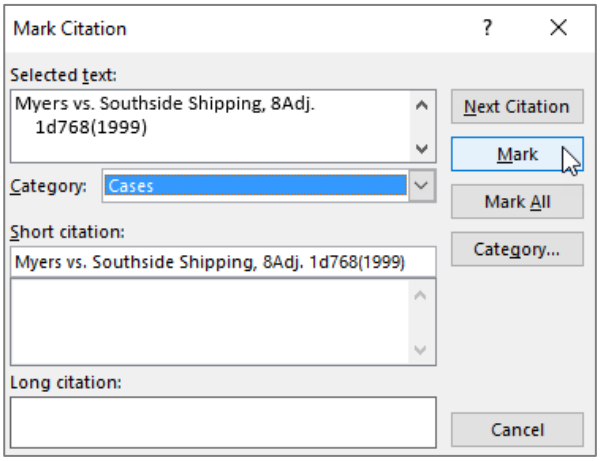
5. The table will be created:



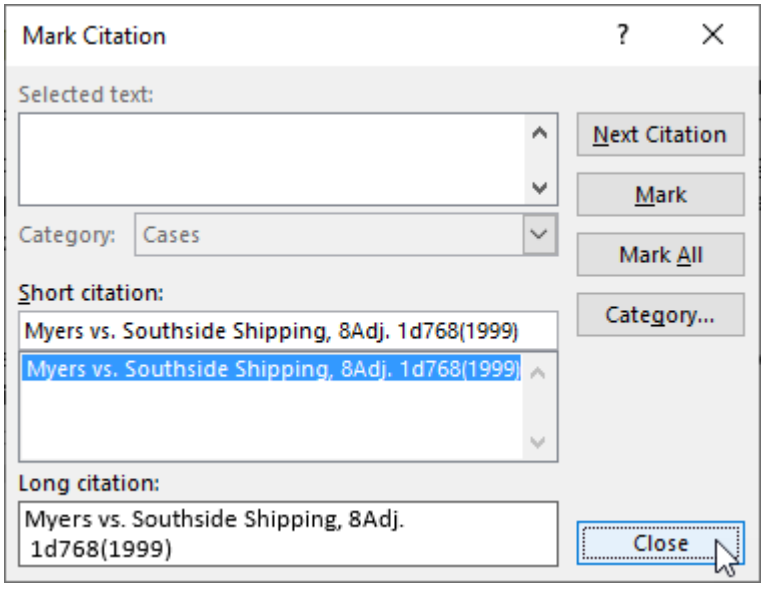
6. Now let us mark the legal references in the document. Go to page three. Select the line "**Myers vs. Southside Shipping, 8 Adj. 1d768(1999).**" Click **References → Mark Citation**:



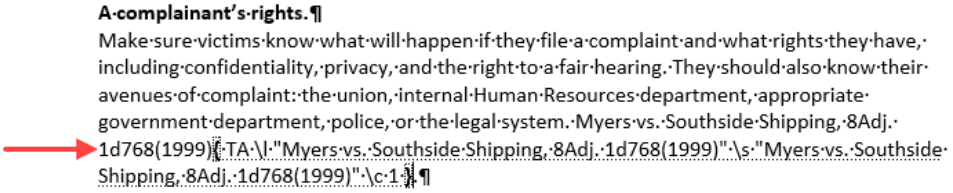
7. Make sure that the **Cases** category is selected and then click **Mark**:



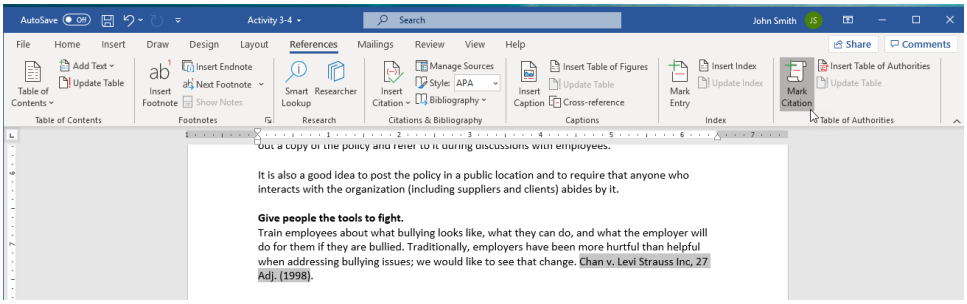
8. After marking the citation, click **Close**:



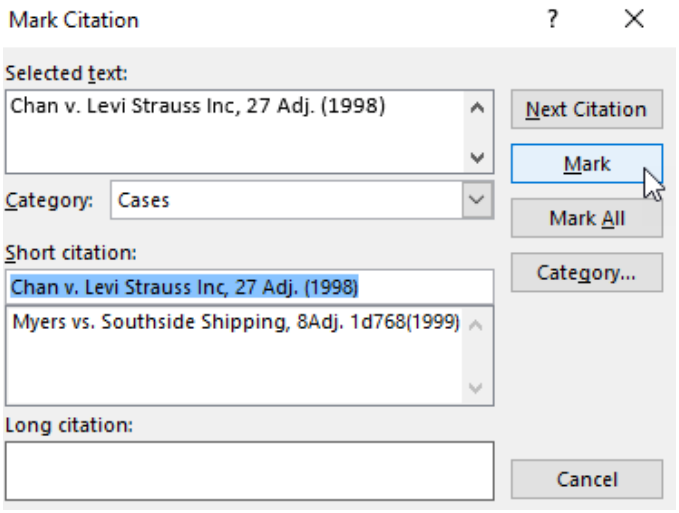
9. The citation will be added to the document. Hidden characters will also be enabled, allowing you to see the reference:



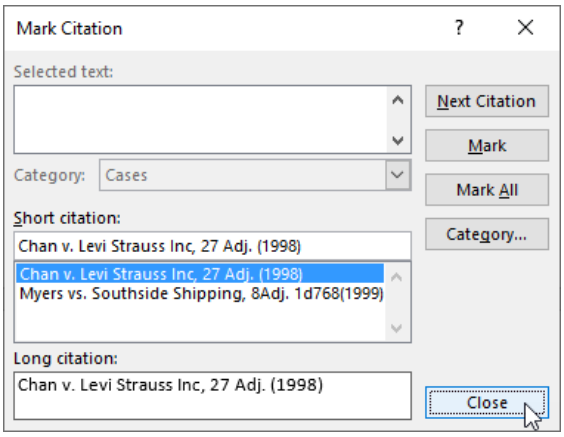
10. Scroll to the next page and select the text "**Chan v. Levi Strauss Inc, 27 Adj. (1998)**." Click **References → Mark Citation**:



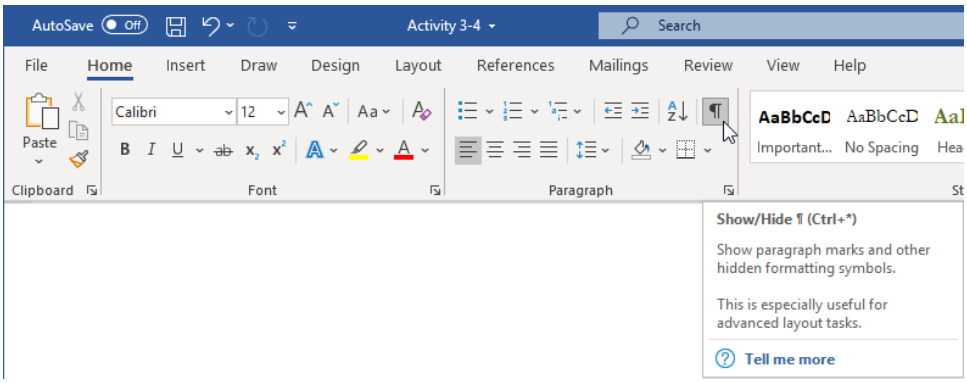
11. Ensure that the **Cases** category has been selected and then click **Mark**:



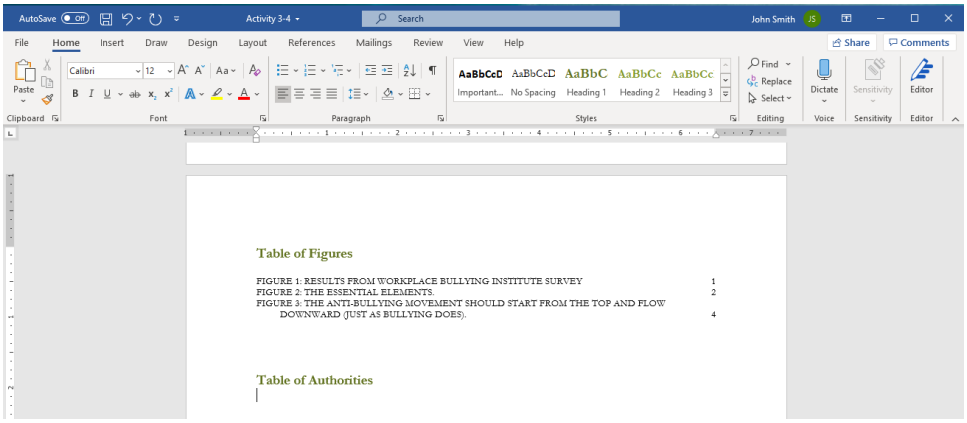
12. Click **Close**:



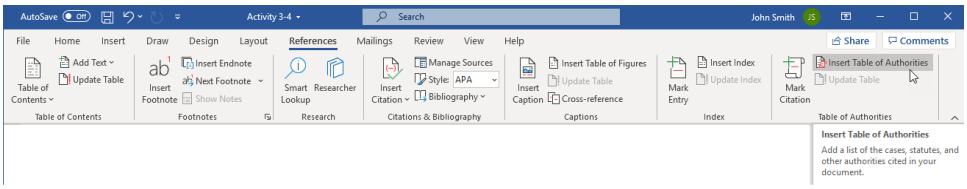
13. Turn off paragraph markings by clicking **Home → Show/Hide**:



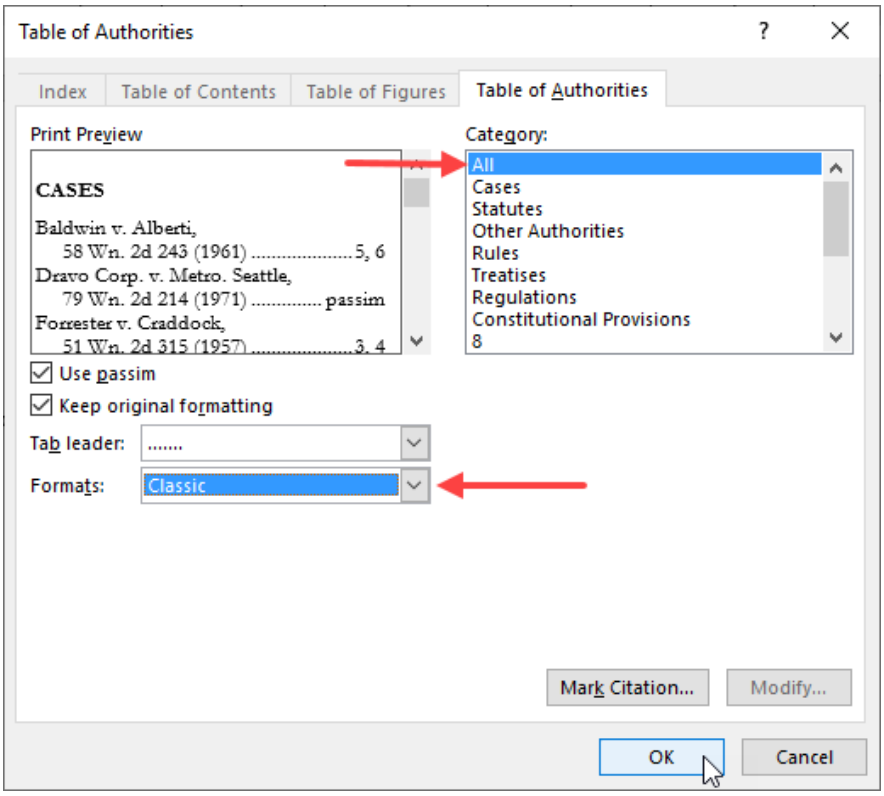
14. Place your cursor below the table of figures that you created earlier. Press **Enter** twice to create some space. Then, type "**Table of Authorities**" using the **Heading 1 style**. Press **Enter** after the heading:



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



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**:



17. The table will be inserted:

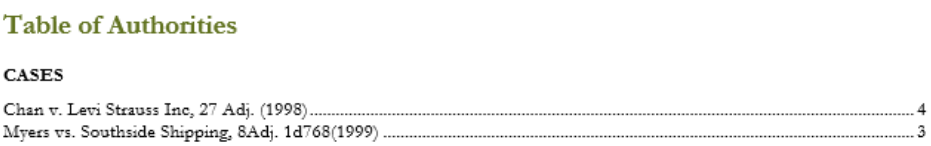


Table of Authorities

CASES

Chan v. Levi Strauss Inc, 27 Adj. (1998) 4
Myers vs. Southside Shipping, 8Adj. 1d768(1999) 3

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.

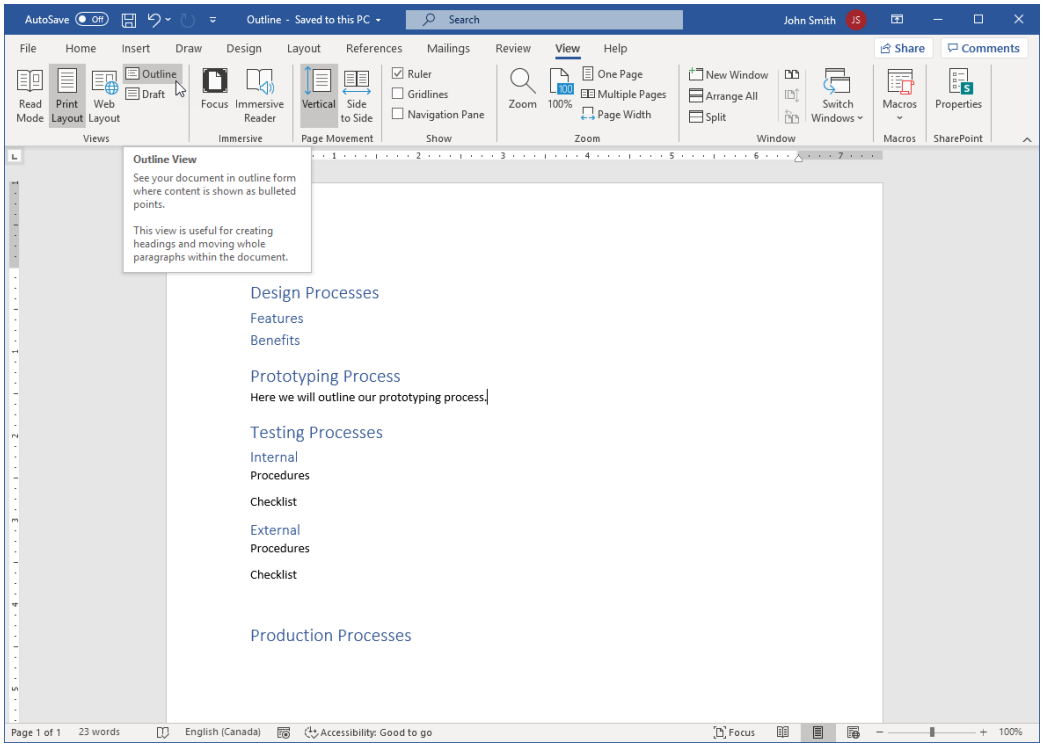
Topic Objectives

In this session, you will learn:

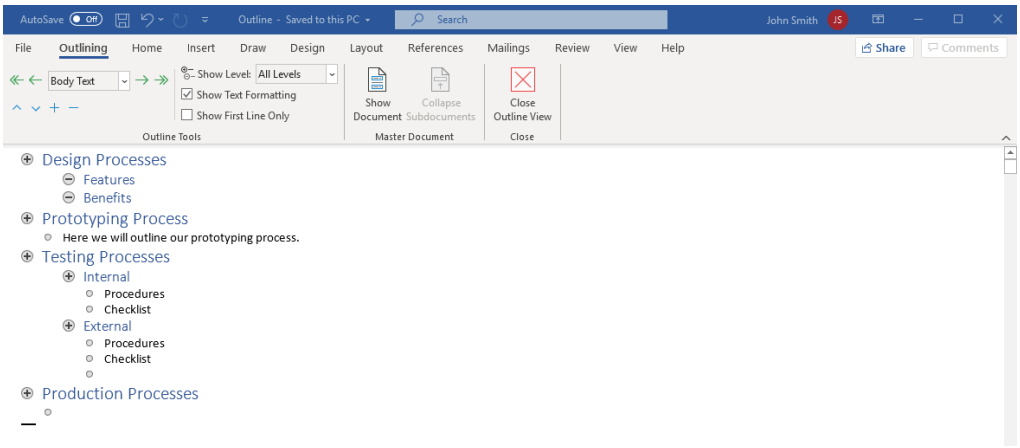
- How to switch to Outline view
- About the symbols in Outline view
- How to use the tools on the Outlining tab
- How to create an outline
- How to promote and demote outline sections

Outline View

To switch to Outline view, click **View→ Outline**:



Your document will then be displayed in Outline view:

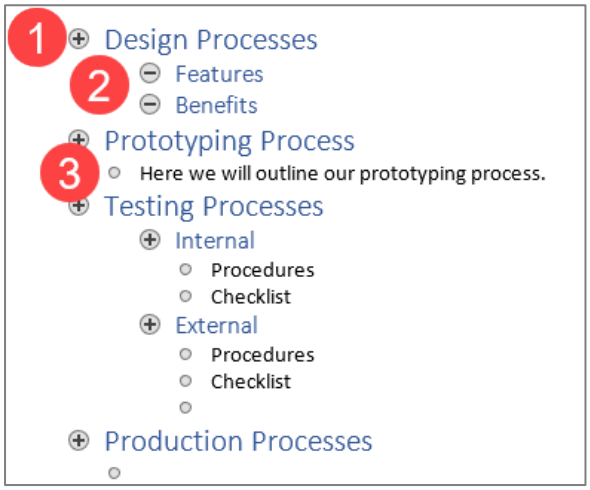


Outline view is special for a few reasons:

- 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

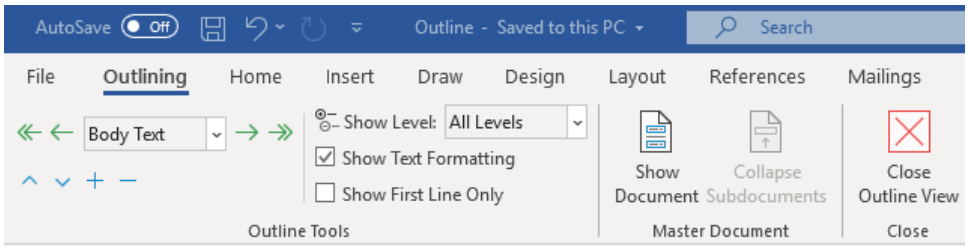
In Outline view, Microsoft Word displays markers beside different types of headings:



Headings that have subordinate text have **plus sign**s 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

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



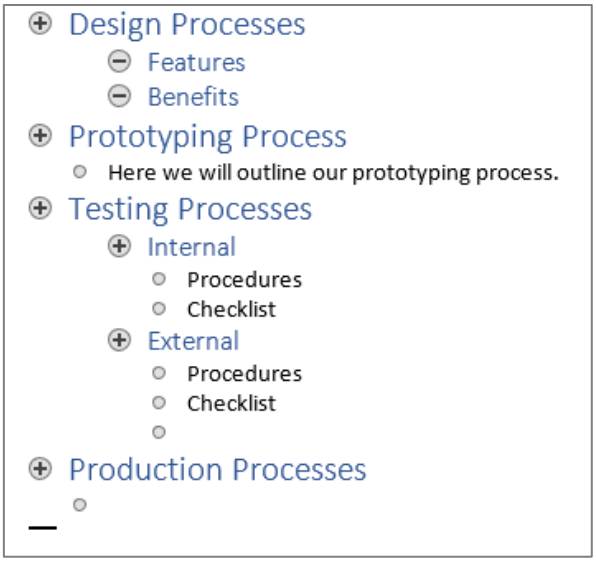
Let us take a quick look at its groups.

- **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.

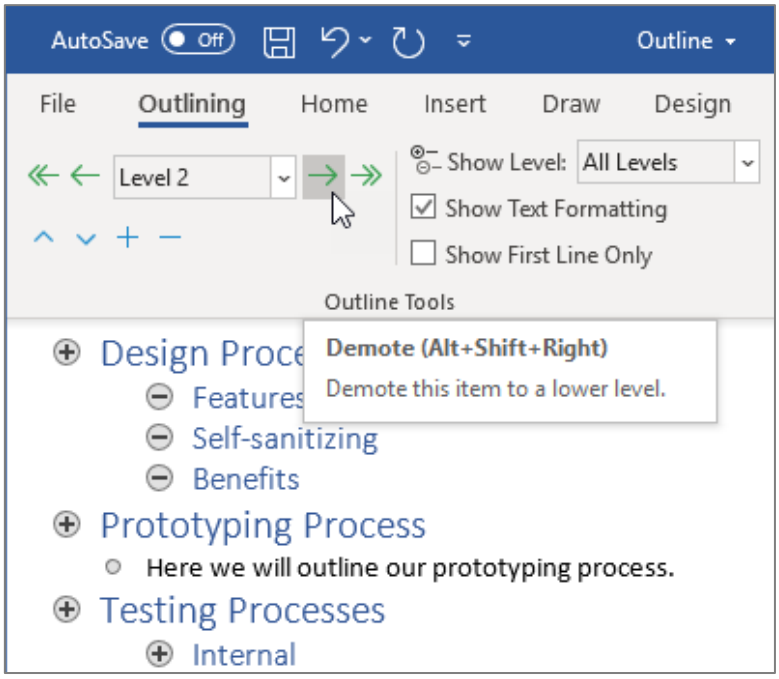
Creating an Outline

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:

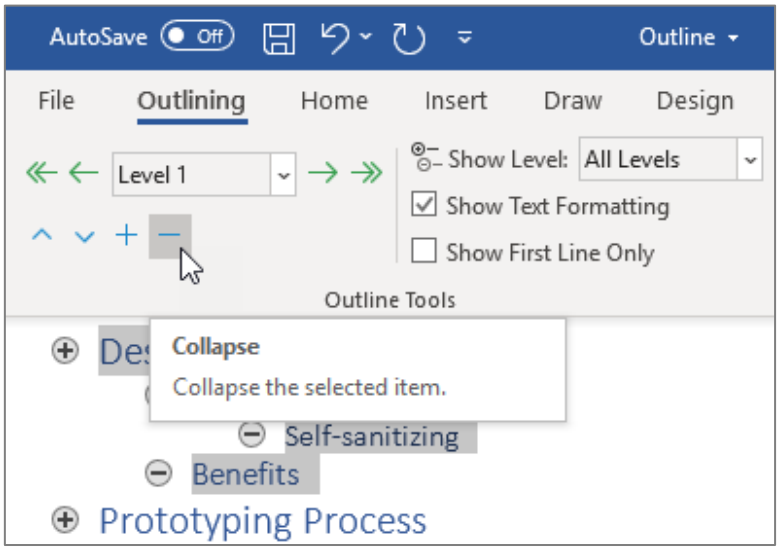


You can add headings at a lower level by pressing the **Tab** key once for each level you want to demote, or you can use the **Demote** arrow on the Outlining tab. You can also do this for existing text:

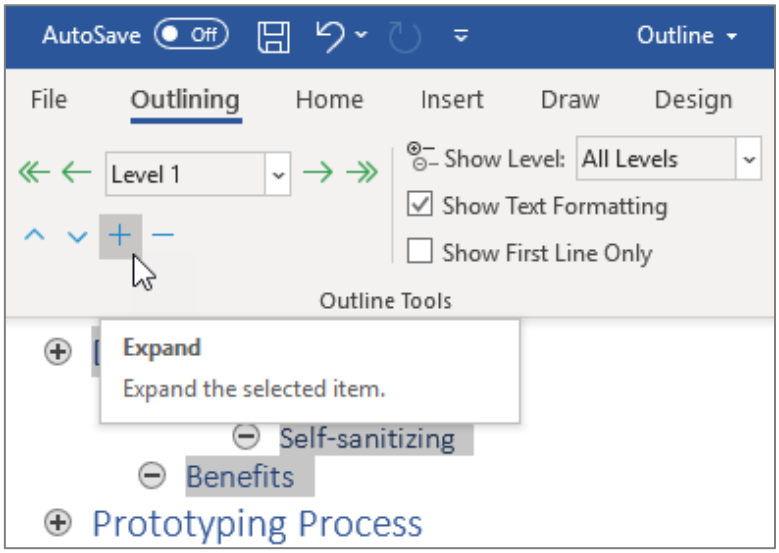


Word allows you to use nine different outline levels, plus body text, to organize your work.

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:

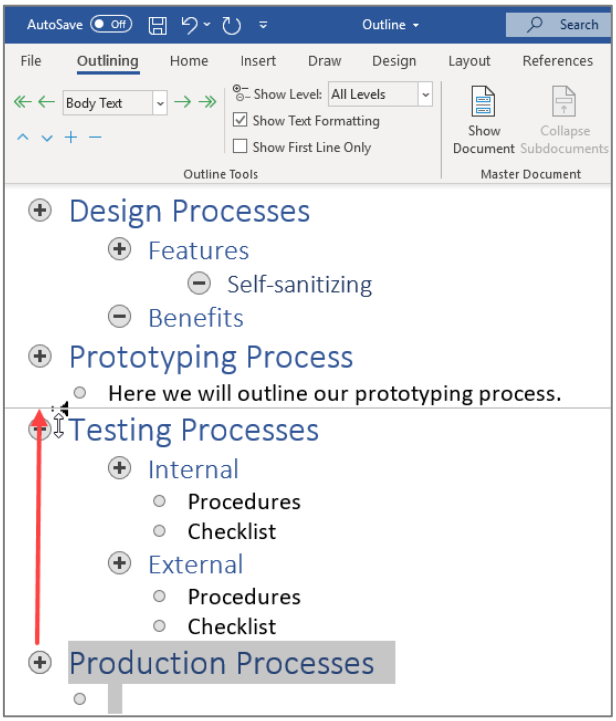


To see the text again, click the heading and click the **Expand** command for each heading level you want to show:

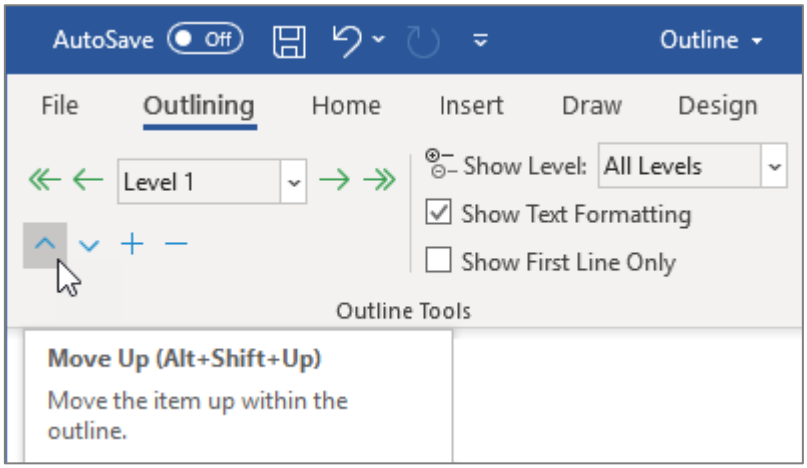


You can also double-click the **+** and **–** icons to the left of outline headings to expand and collapse subordinate items, respectively.

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:

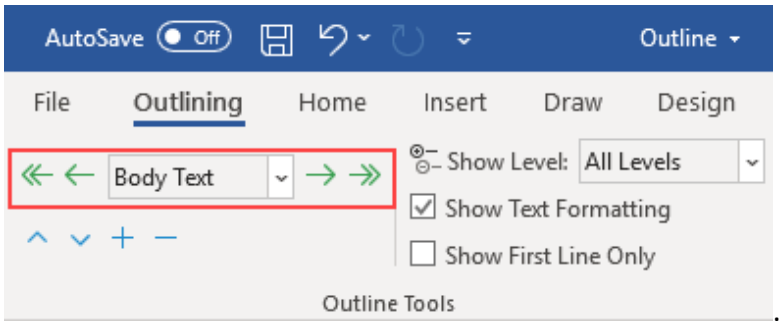


Note that if you move a heading that has visible subitems, the subitems will not move with the main heading. You will have to move all elements separately or, more simply, collapse the heading and then move it.

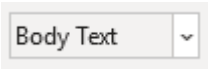
Promoting and Demoting Sections

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:

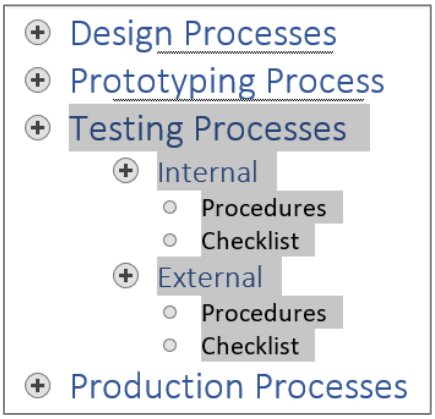


Here is an overview of each command in this group.

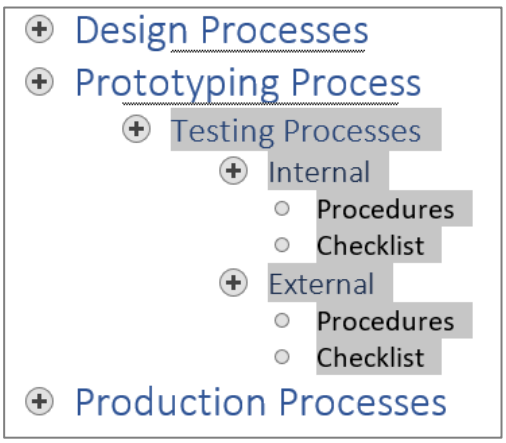
	Promote item to Heading 1.
	Promote item one level.
	Choose the specific level to apply to this item.
	Demote item one level.
	Demote item to body text.

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:

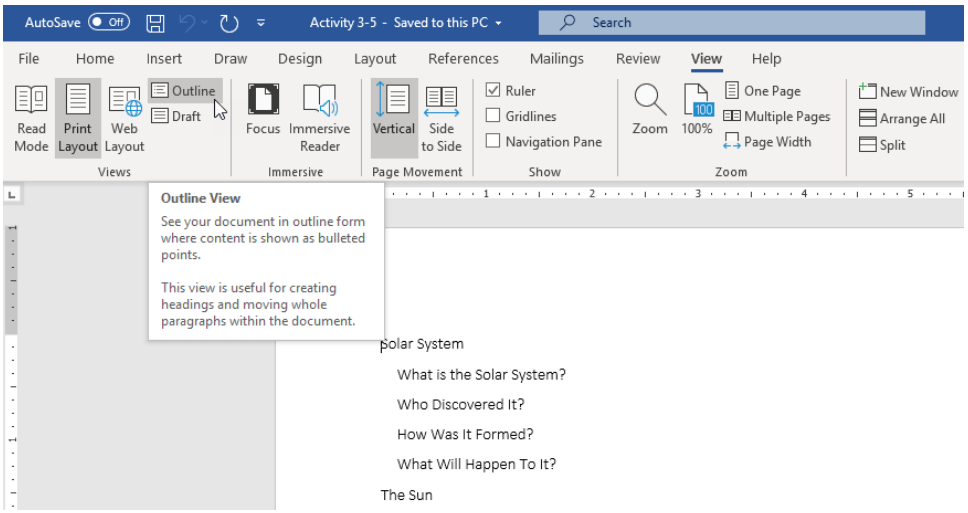


Activity 3-5: Managing Outlines

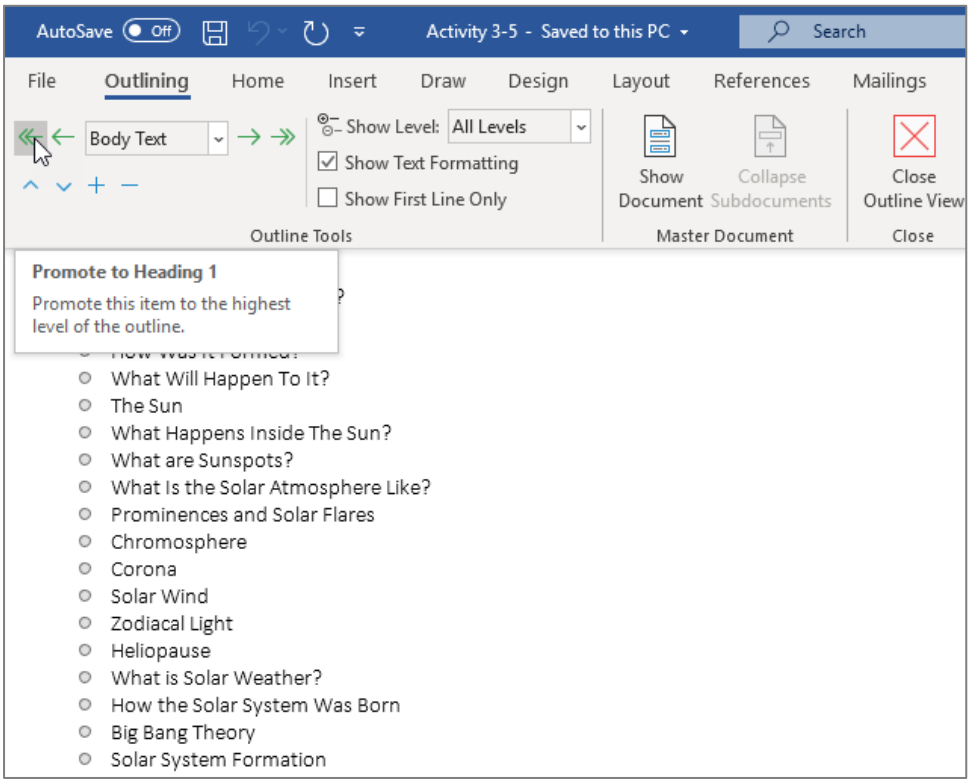
In this activity, we will turn a plain text document into a document outline.

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

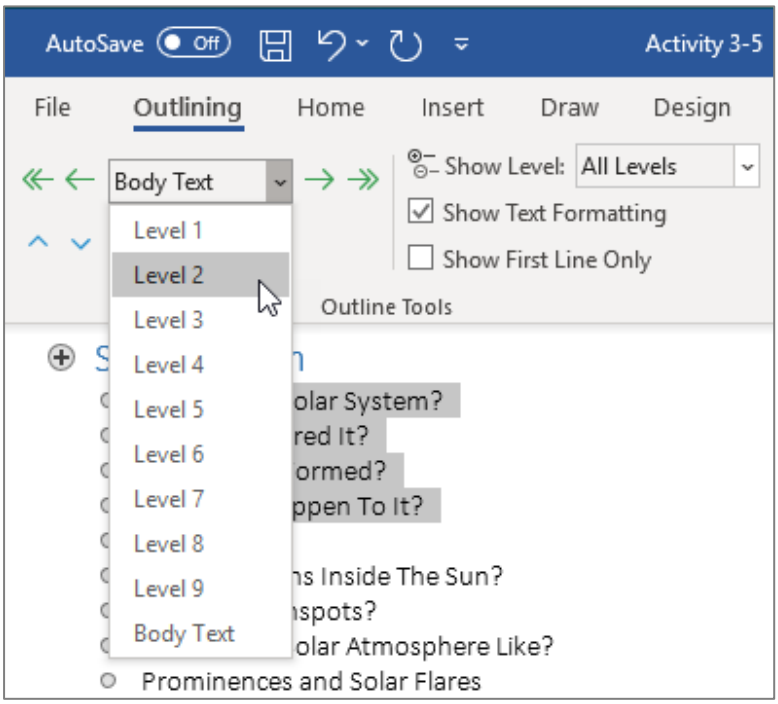
2. Click **View → Outline**:



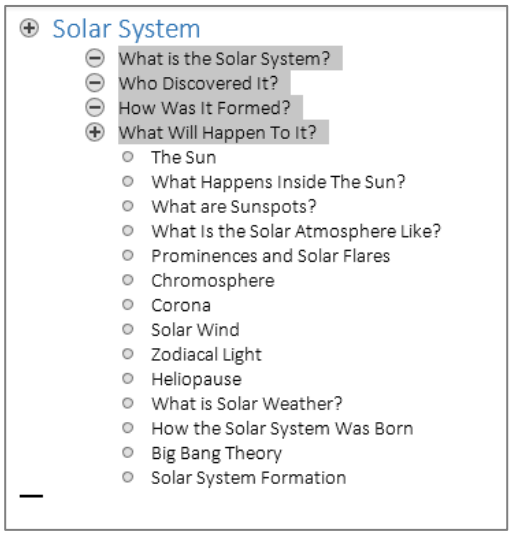
3. With your cursor in the first line, click **Outlining → Promote to Heading 1**:



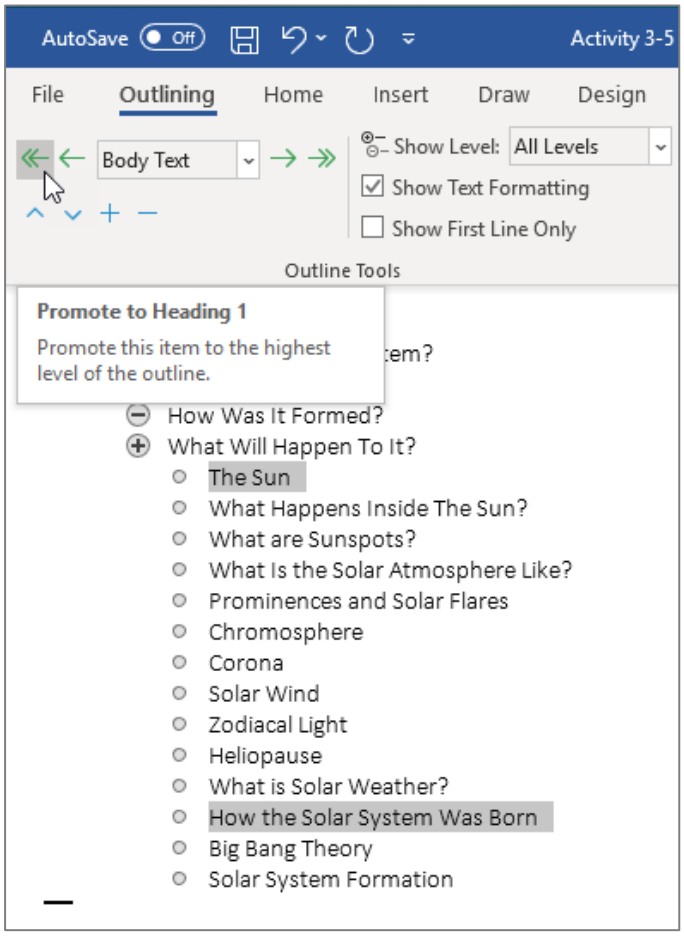
4. Select the next four lines. Click **Outlining → Outline Level menu → Level 2**:



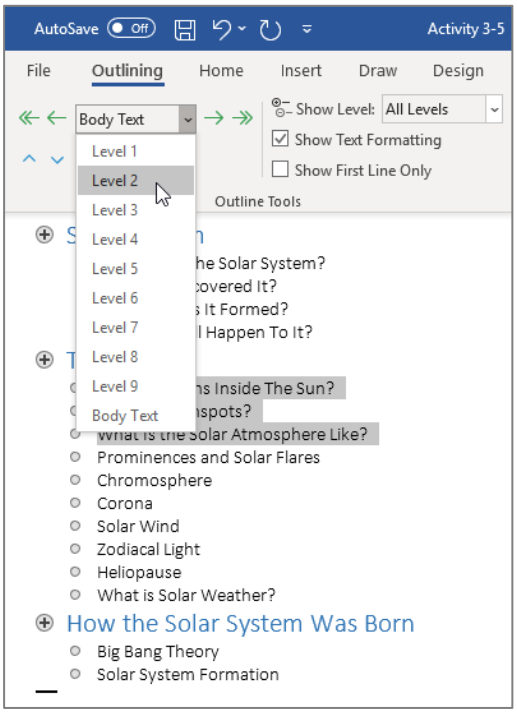
5. The headings will be promoted, but notice that this did not change the formatting of the text:



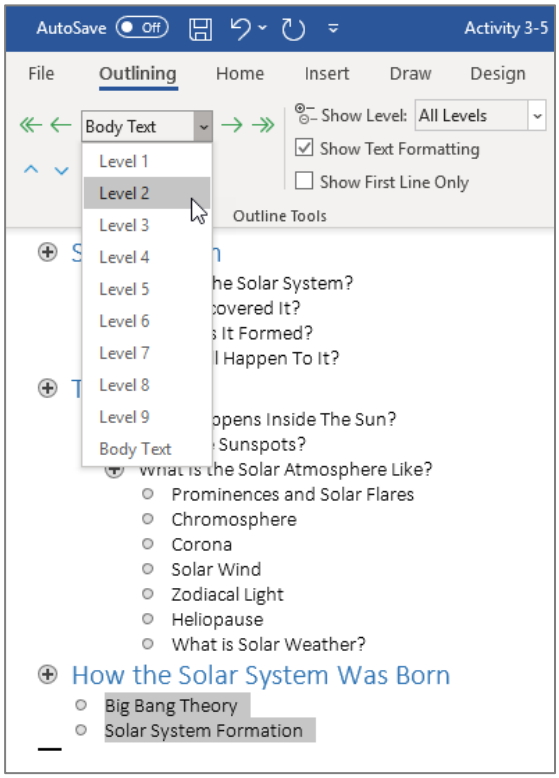
6. Now, select the lines "**The Sun**" and "**How the Solar System Was Born**." Apply either of the methods we just used to promote these lines to **Heading 1**:



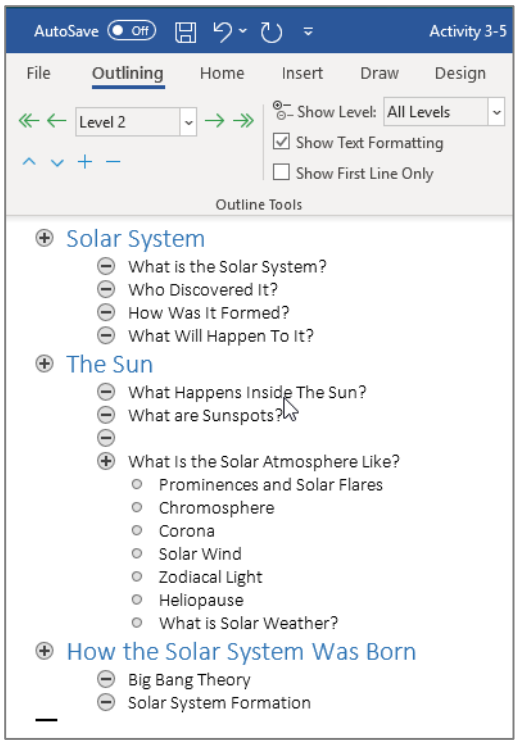
7. **Apply Level 2** to the first three lines under “The Sun” heading:



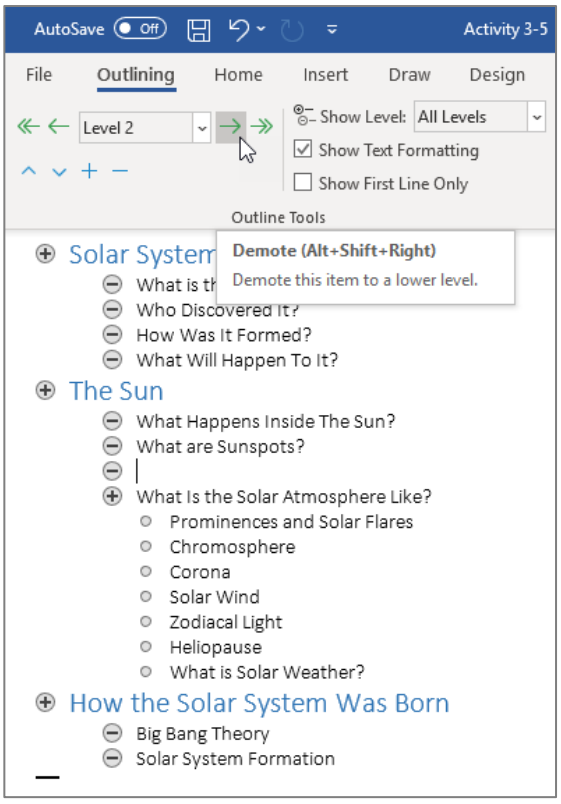
8. **Apply Level 2** to the lines under the “How the Solar System Was Born” heading:



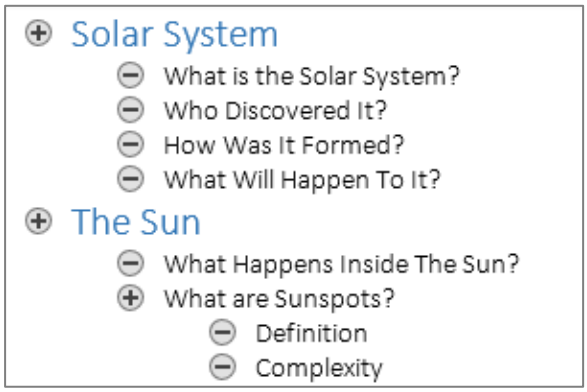
9. Click to **place your cursor after the "What are Sunspots?" heading** and press **Enter**:



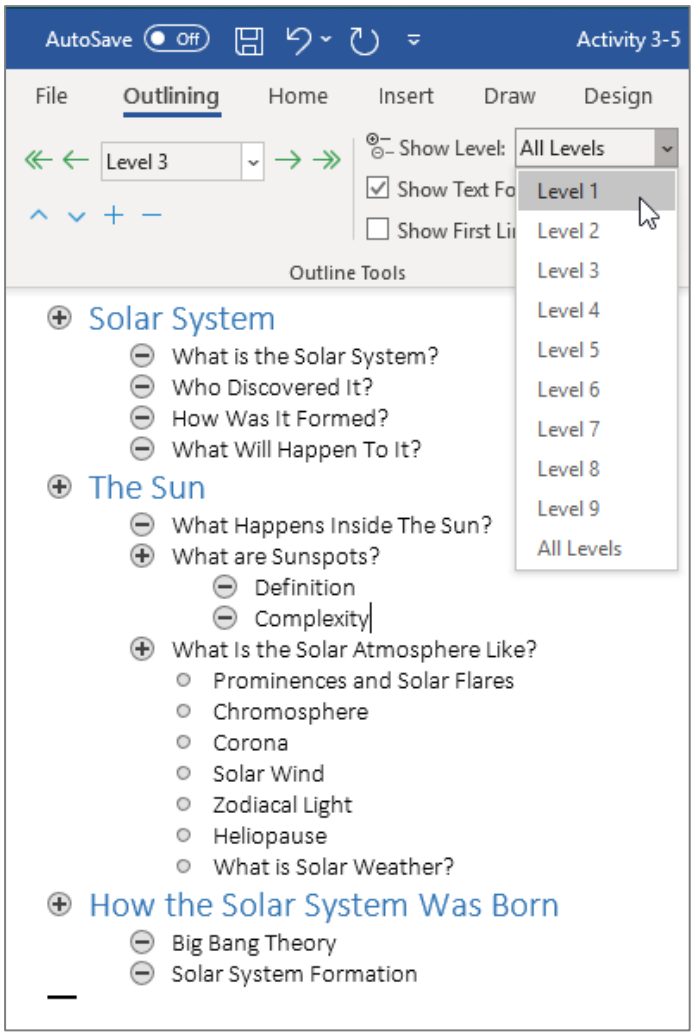
10. Click **Outlining → Demote**:



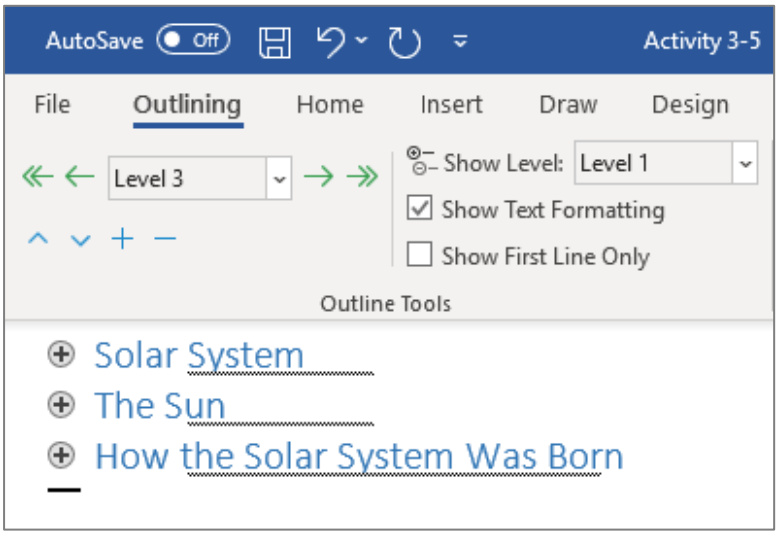
11. Add the headings "**Definition**" and "**Complexity**:"



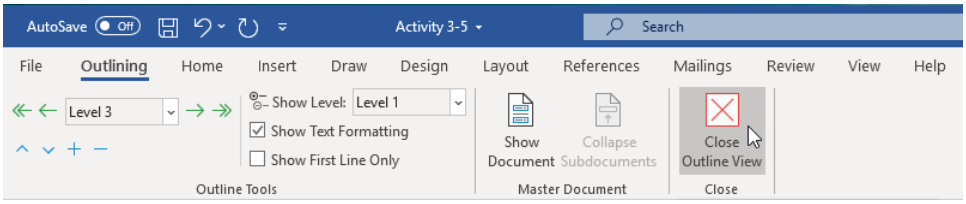
12. The outline is now complete. Now, just show the top headings by clicking **Outlining → Show Level → Level 1**:



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

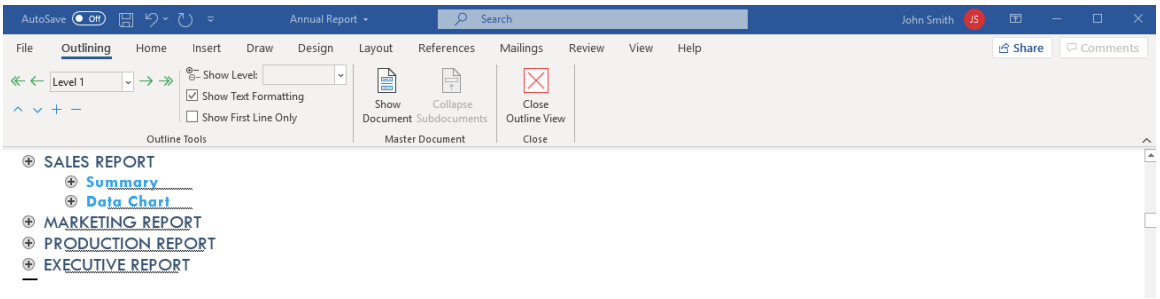
Using a master/subdocument configuration when working with complex documents provides several benefits.

- 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.

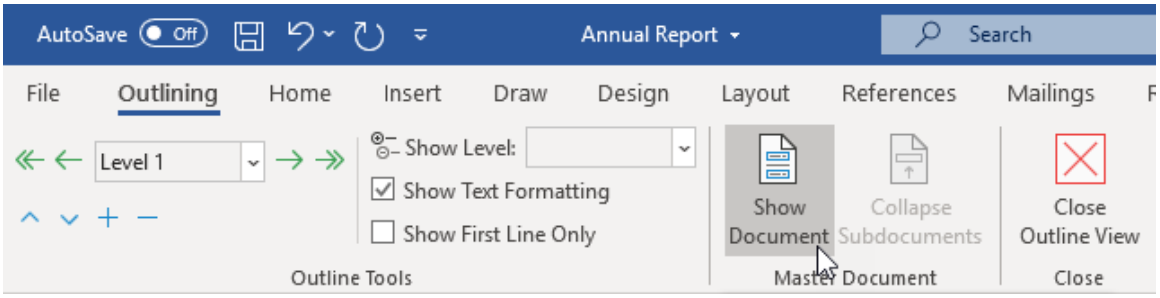
Next, create the master document and save it in this location. Then, create the content of the master document. Start by switching to Outline view. (Remember that you can do this using the View tab.) Then, type your document in Outline view, assigning headings and levels to each of the topics:



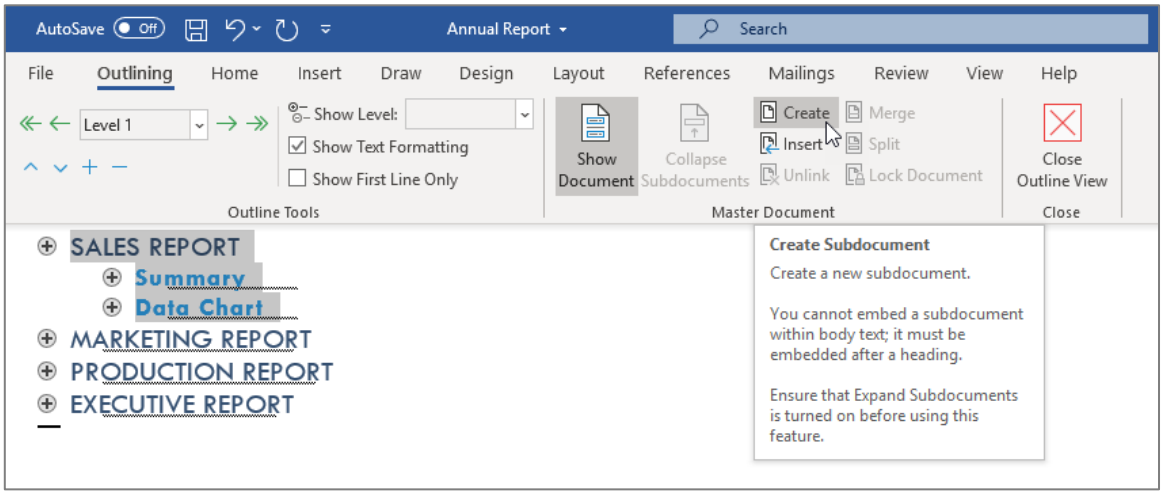
(You can also take an existing document and format it using Outline view.) Once the outline is completed, save the document. Your master document is done!

Creating Subdocuments

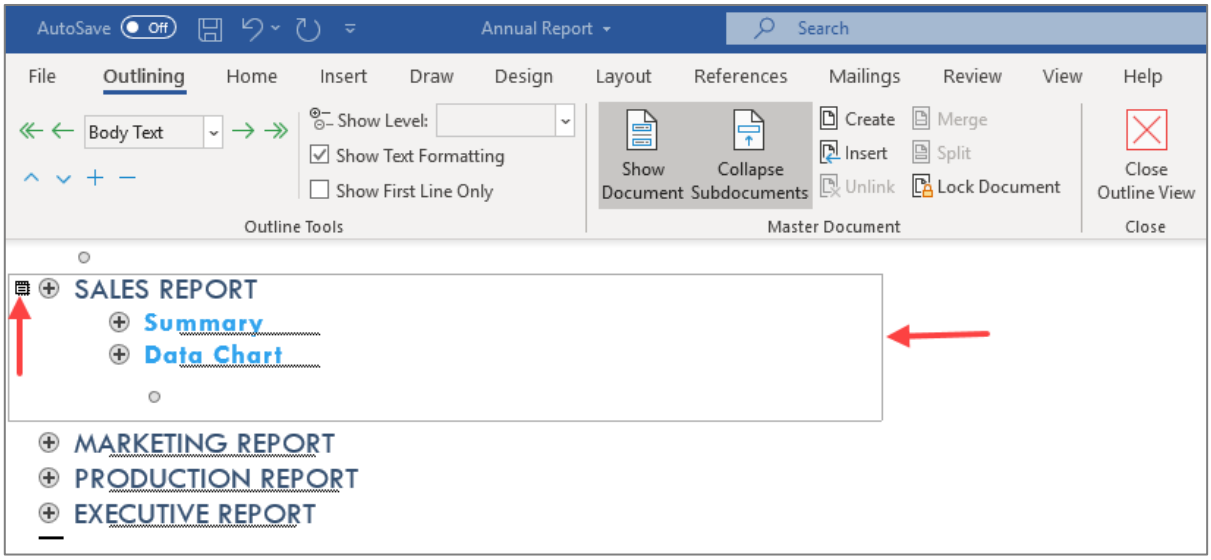
There are two ways to add sub-documents to a master document. The first way to add a subdocument is to create a new one from existing text. First, switch to Outline view and click **Outlining → Show Document**:



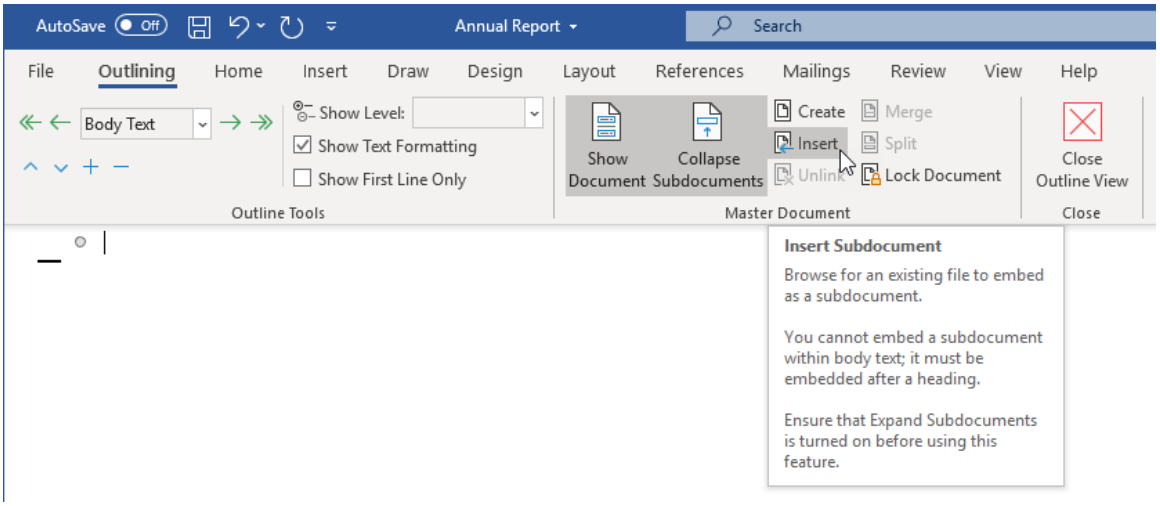
This will display an extra set of subdocuments controls on the Outlining tab. Next, select the headings and/or text that you want to split into subdocuments and click **Outlining → Create**:



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:

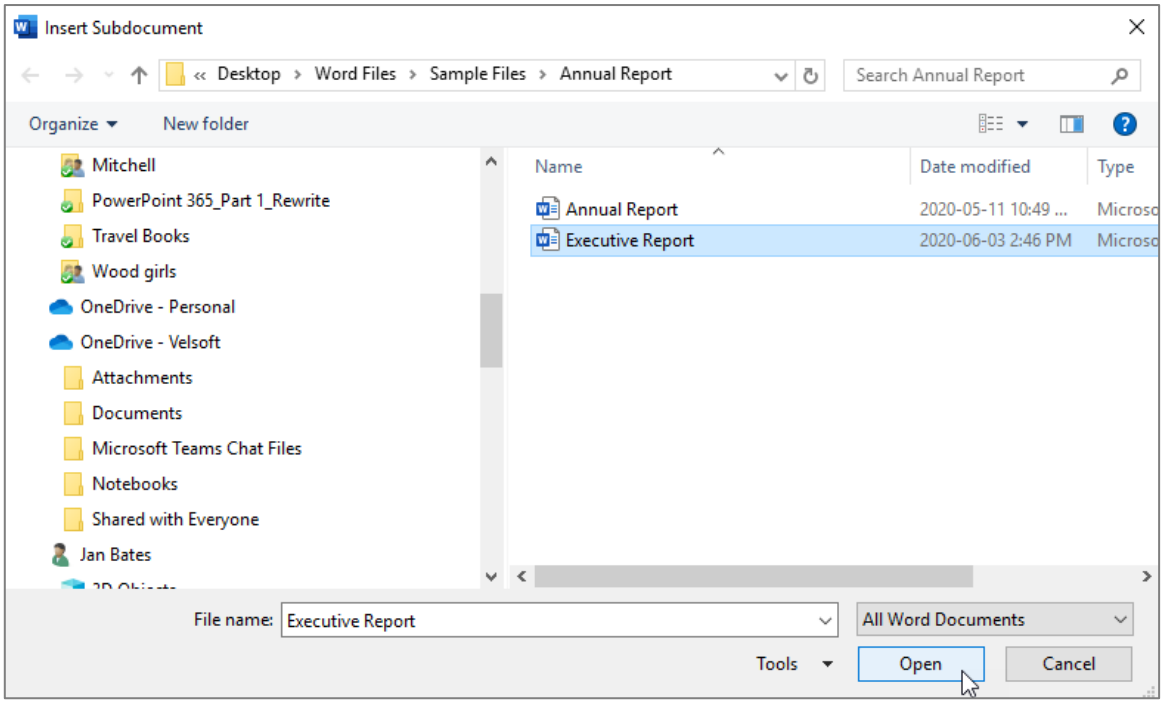


You can also add a subdocument from a separate file. First, place your cursor where you want the subdocument to go. Then, click **Outlining → Insert**:

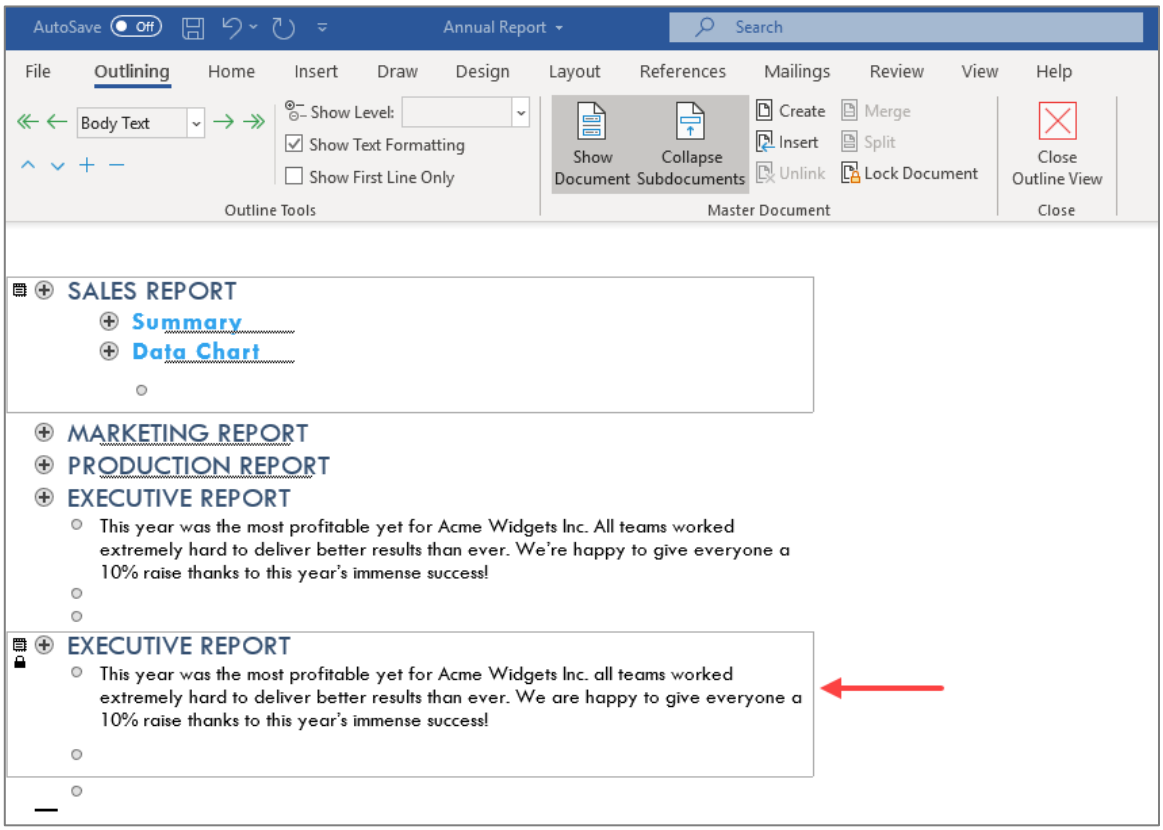


(Remember, if you cannot see this command, click **Show Document** first.)

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**:

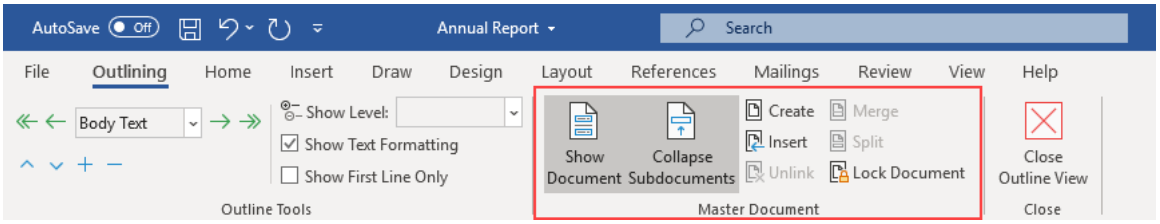


The subdocument will then be added to the master document:



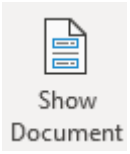
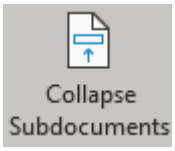
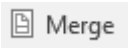
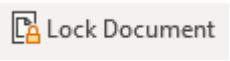
Master Document Group

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



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

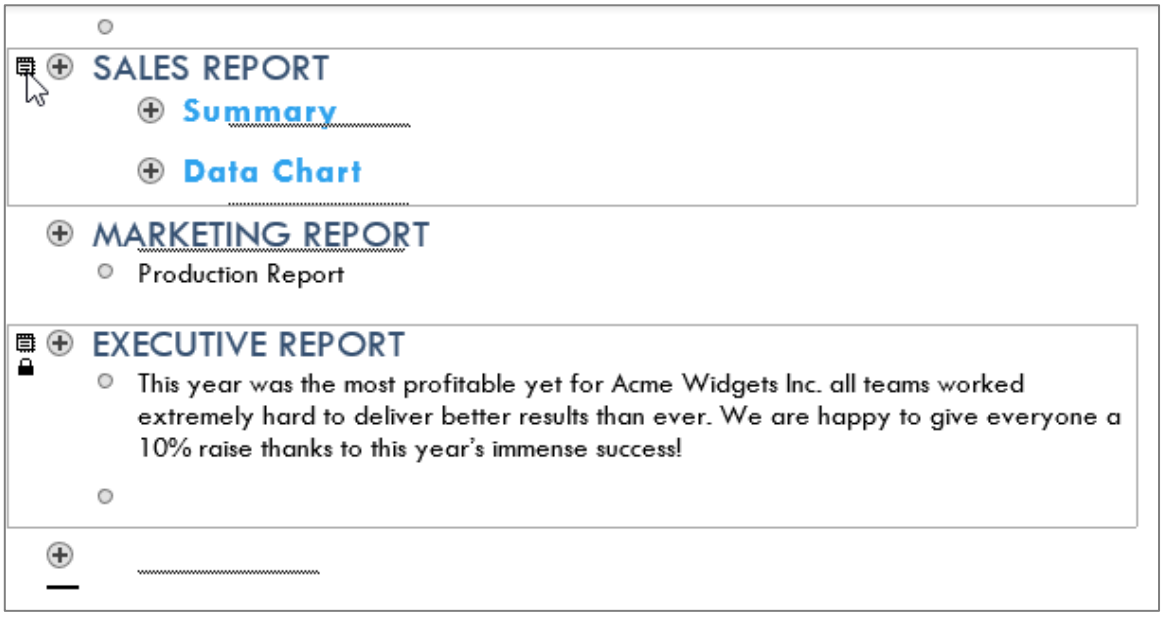
Let us look at its commands.

Command	Icon	Description
Show Document		Shows subdocument content and master/subdocument commands.
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 a new subdocument.
Insert Subdocument		Insert a file as a subdocument.
Unlink Subdocument		Remove the link to the current subdocument and place the text directly in the master document.
Merge Subdocuments		Combine multiple subdocuments into one subdocument.
Split Subdocuments		Separate the subdocument into two parts at the point of your cursor.
Lock/Unlock Documents		Lock or unlock master or subdocuments to prevent or enable editing.

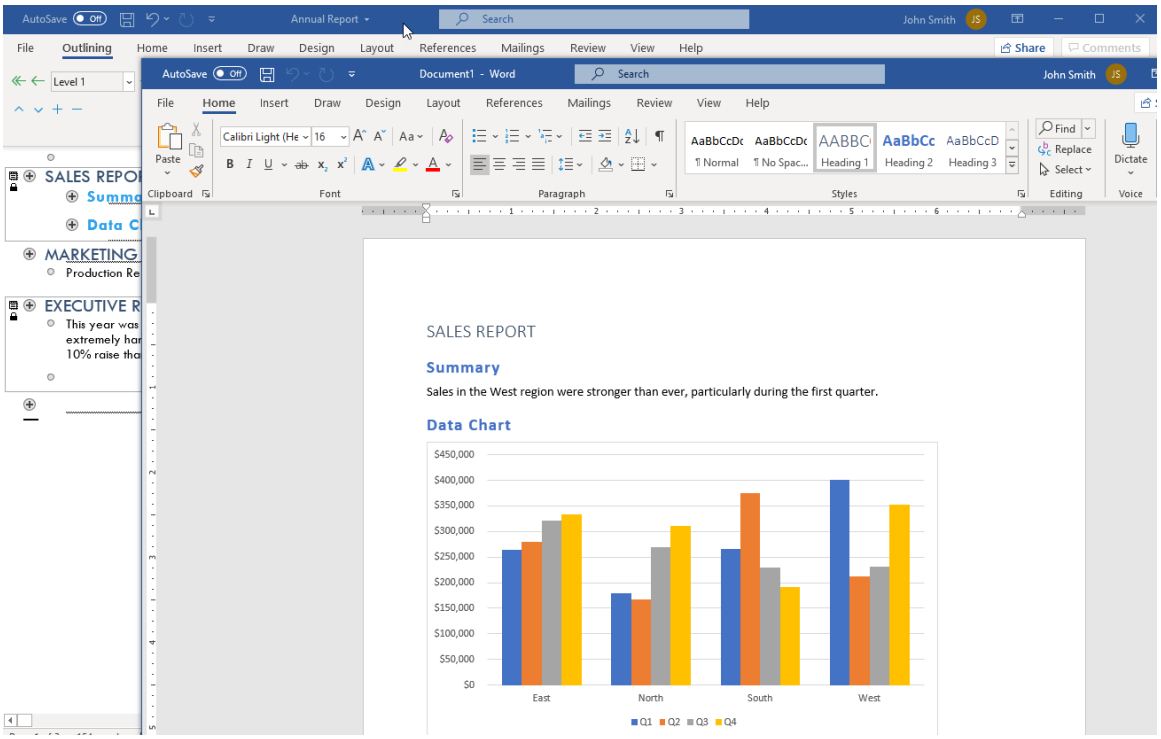
Managing Subdocuments

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:

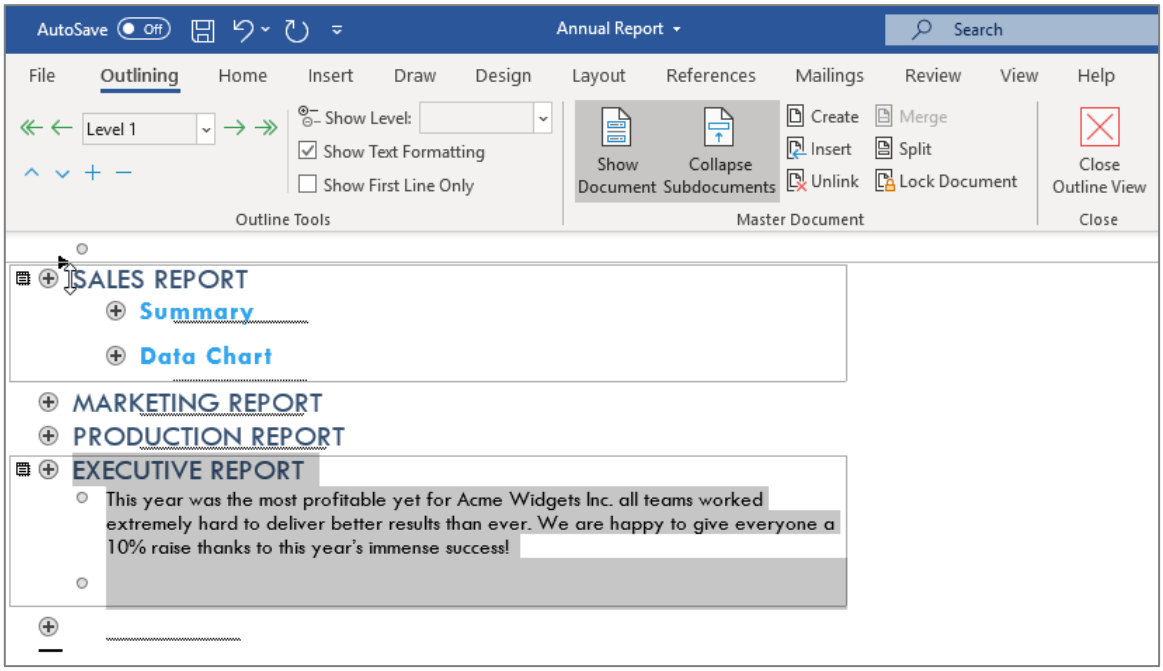


The subdocument will open in its own Word window:



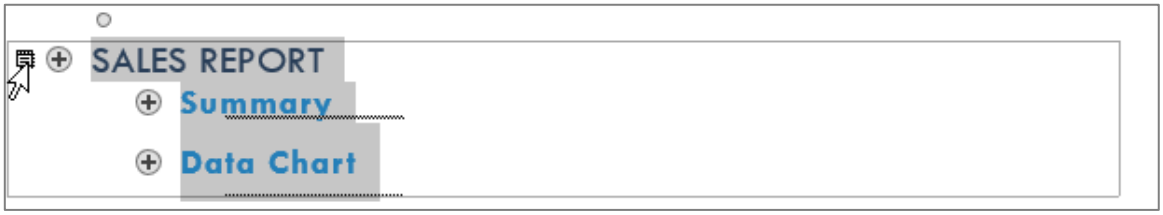
Moving Subdocuments

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



Deleting Subdocuments

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

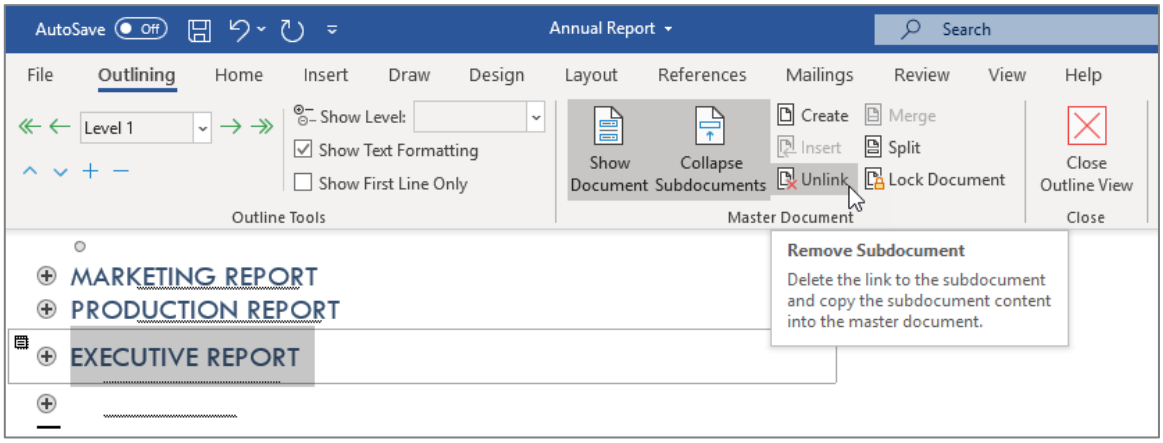


With the content selected, press **Delete** on your keyboard to remove the content:

Note that the actual document file will not be deleted.

Unlinking Subdocuments

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



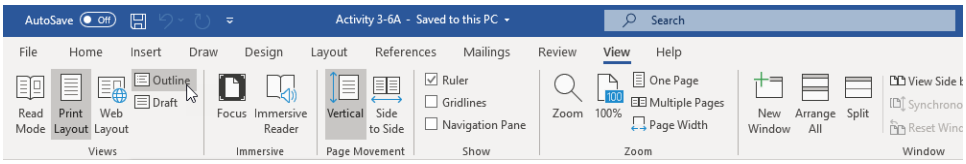
The subdocument will now be part of the master document:

Activity 3-6: Creating a Master Document

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

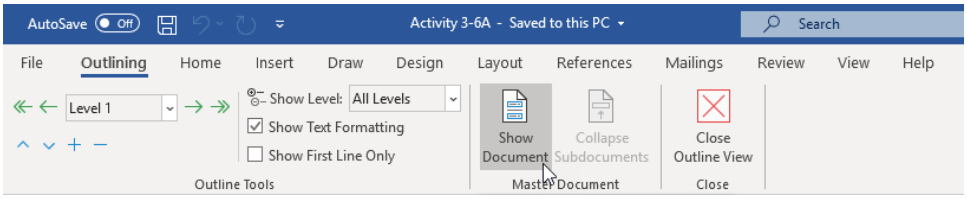
1. To begin, open Activity 3-6A from the Activity 3-6 folder in your Exercise Files. This document will be used as the master file:

2. Click **View → Outline**:

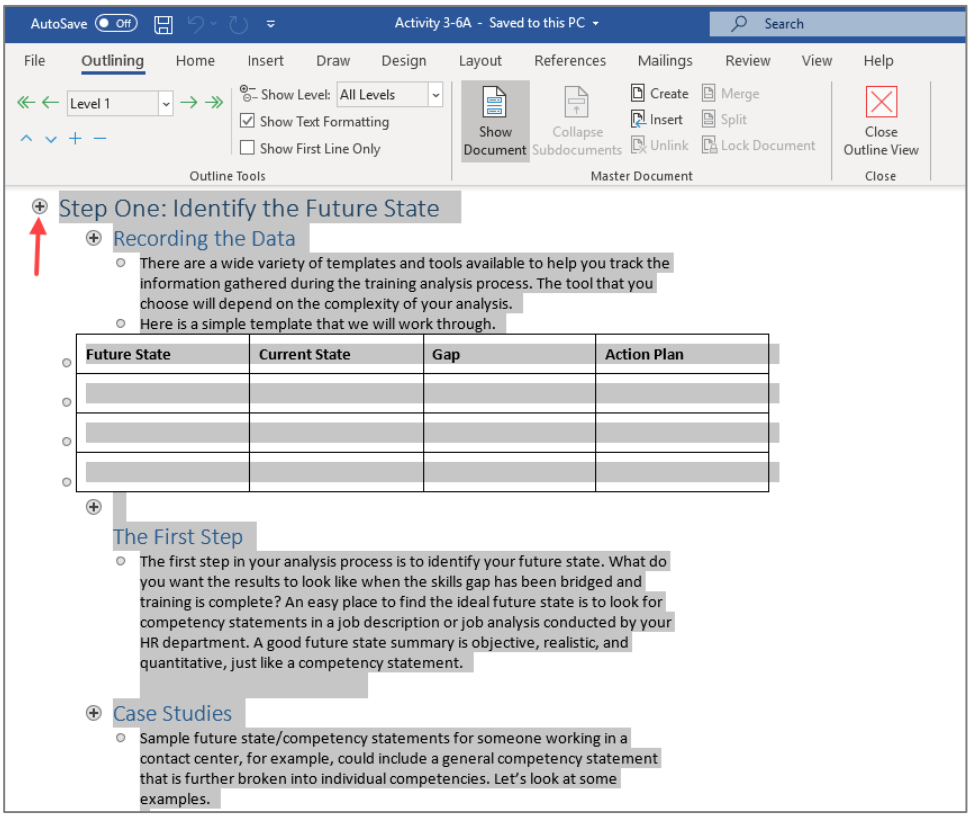


(If Outline view is already shown, skip to the next step.)

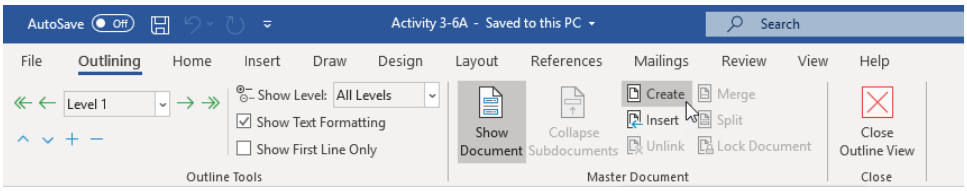
3. Click **Outlining → Show Document**, if it is not already selected. This will display extra commands in the Master Document group:



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

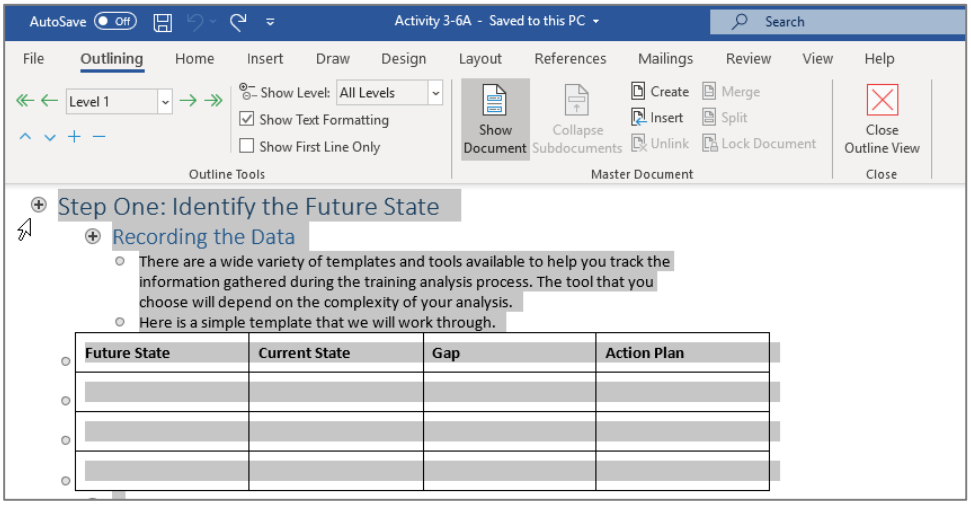


5. Click **Outlining → Create**:



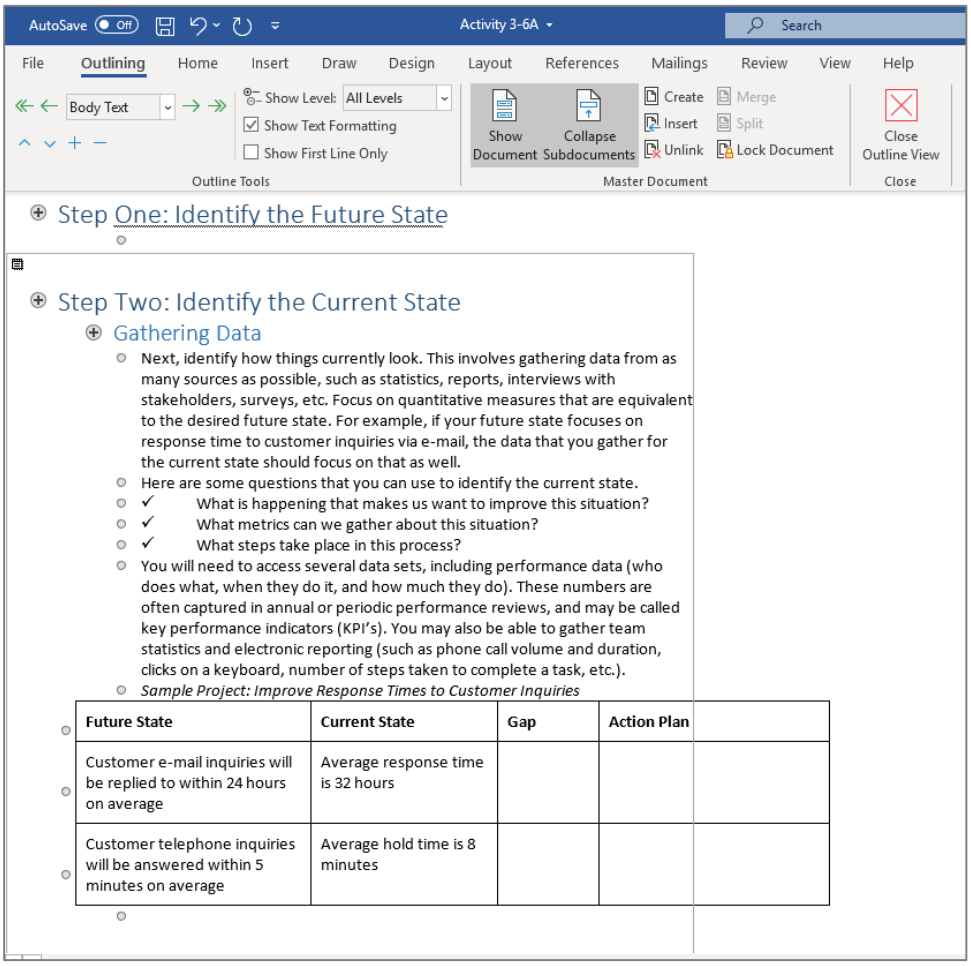
Now this section will be saved as its own subdocument.

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

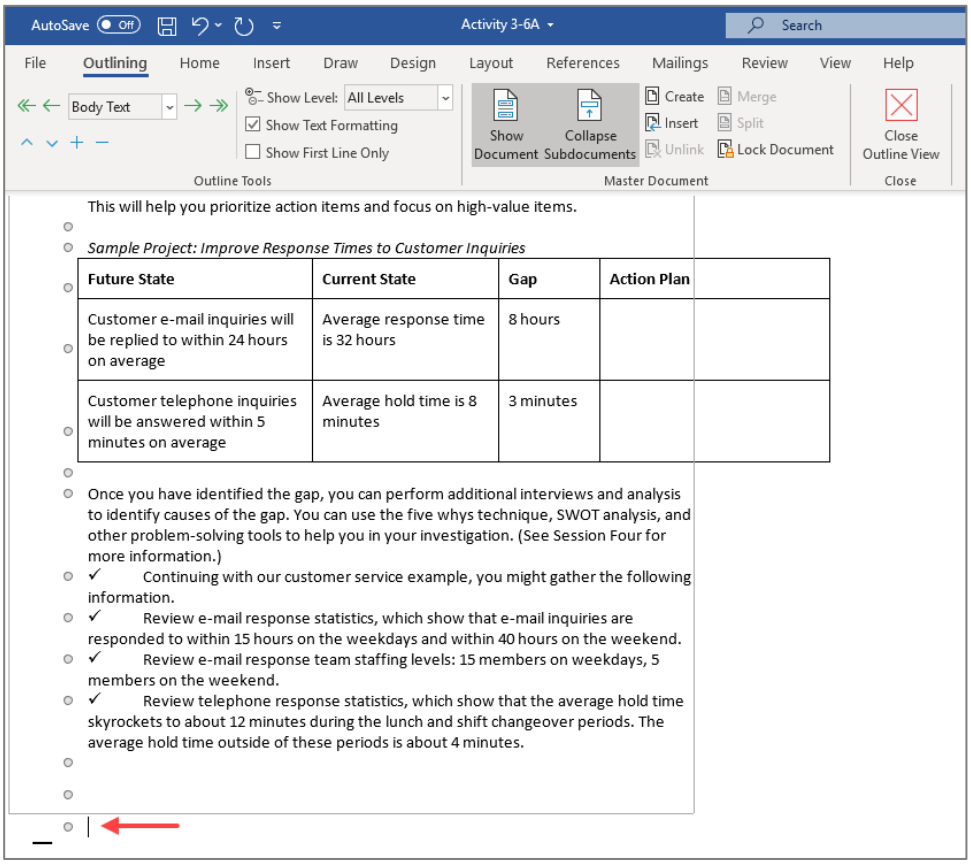


Now this section will be saved as its own subdocument.

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:



This will help you prioritize action items and focus on high-value items.

Sample Project: Improve Response Times to Customer Inquiries

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	
Customer telephone inquiries will be answered within 5 minutes on average	Average hold time is 8 minutes	3 minutes	

Once you have identified the gap, you can perform additional interviews and analysis to identify causes of the gap. You can use the five whys technique, SWOT analysis, and other problem-solving tools to help you in your investigation. (See Session Four for more information.)

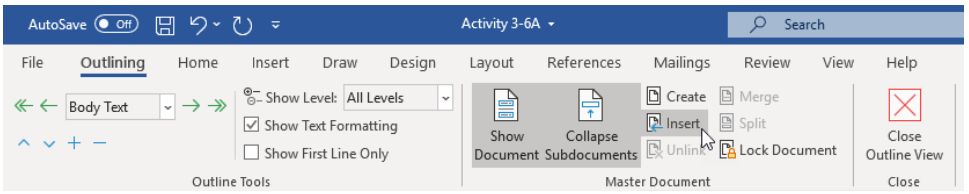
✓ Continuing with our customer service example, you might gather the following information.

✓ Review e-mail response statistics, which show that e-mail inquiries are responded to within 15 hours on the weekdays and within 40 hours on the weekend.

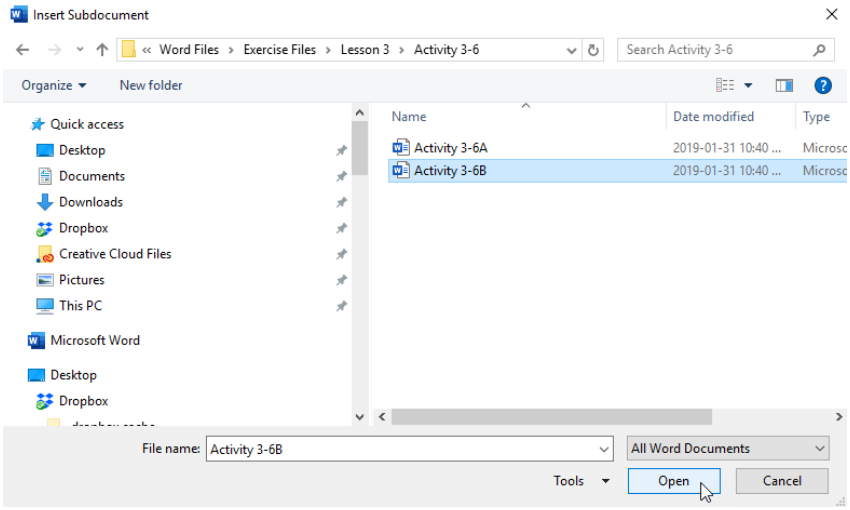
✓ Review e-mail response team staffing levels: 15 members on weekdays, 5 members on the weekend.

✓ Review telephone response statistics, which show that the average hold time skyrockets to about 12 minutes during the lunch and shift changeover periods. The average hold time outside of these periods is about 4 minutes.

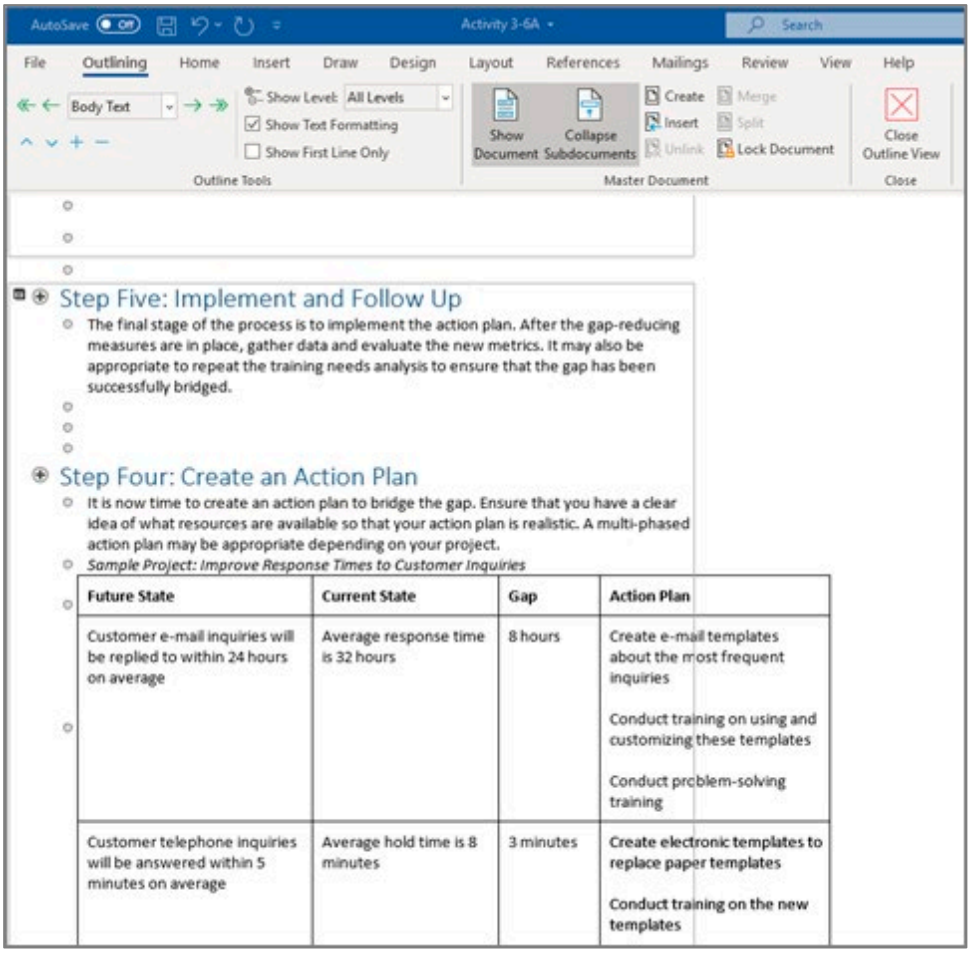
9. Click **Outlining → Insert**:



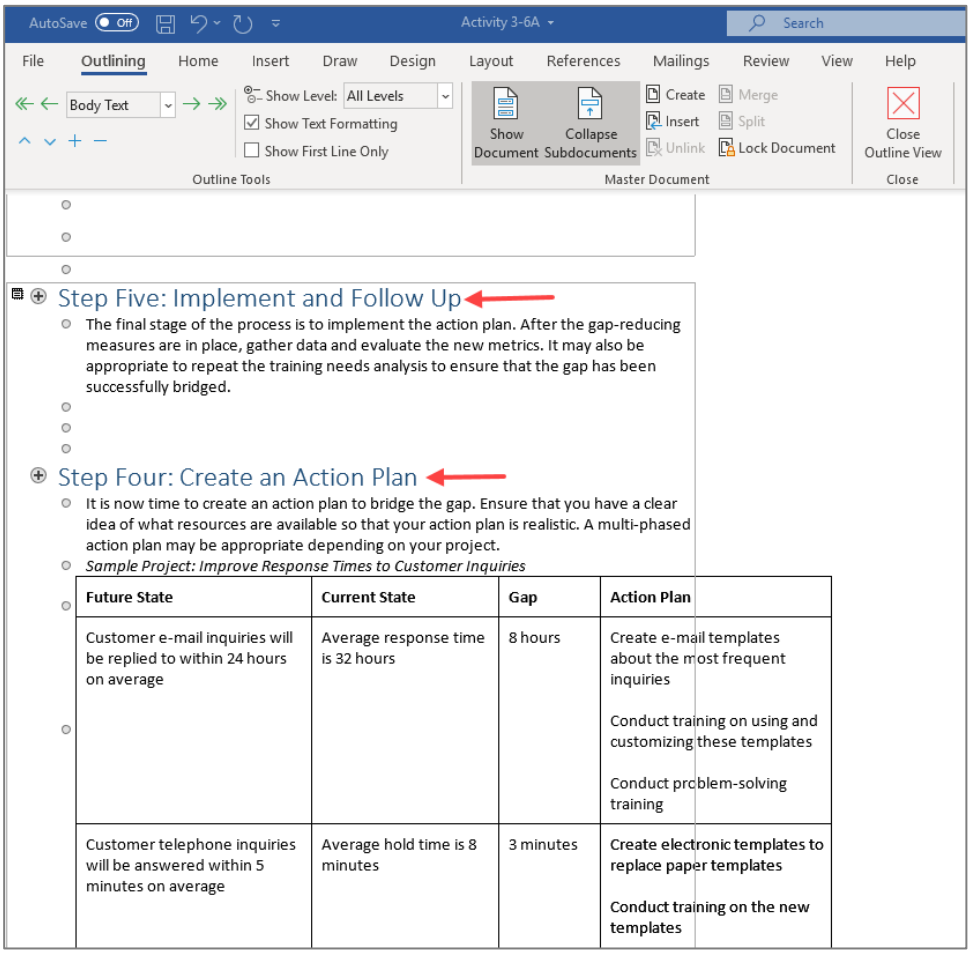
10. Browse to the Activity 3-6 folder in your Exercise Files folder. Select Activity 3-6B and click **Open**:



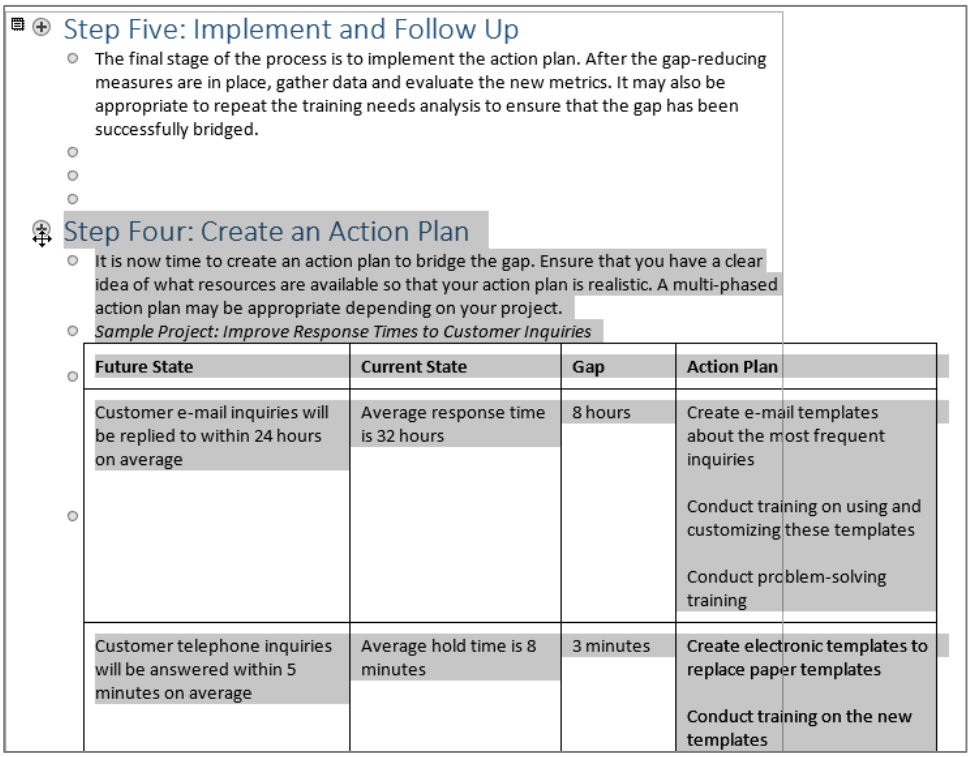
11. The document will be inserted:



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



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



Step Five: Implement and Follow Up

The final stage of the process is to implement the action plan. After the gap-reducing measures are in place, gather data and evaluate the new metrics. It may also be appropriate to repeat the training needs analysis to ensure that the gap has been successfully bridged.

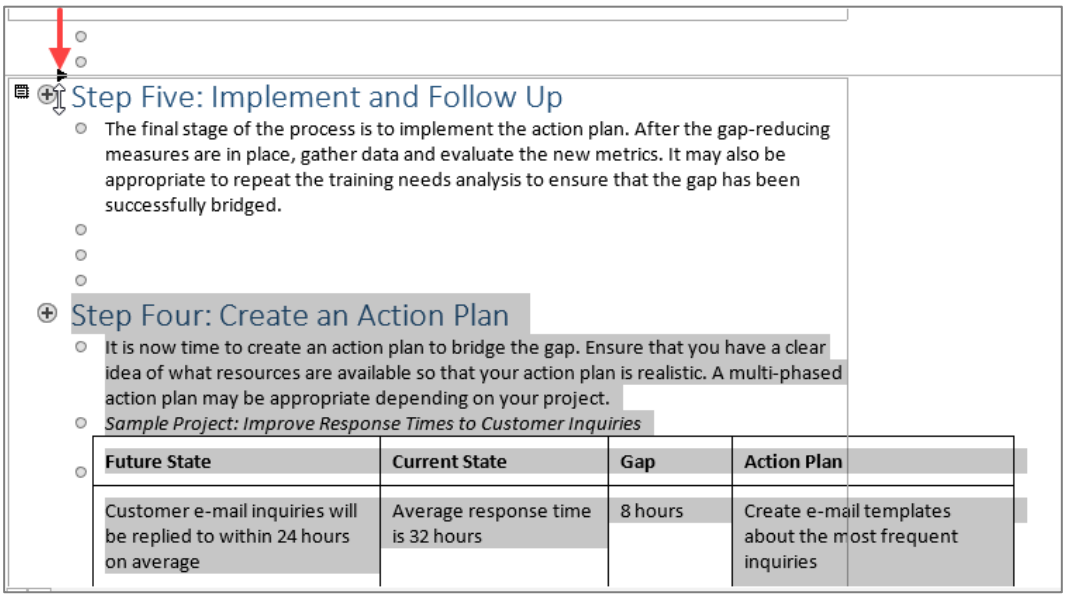
Step Four: Create an Action Plan

It is now time to create an action plan to bridge the gap. Ensure that you have a clear idea of what resources are available so that your action plan is realistic. A multi-phased action plan may be appropriate depending on your project.

Sample Project: Improve Response Times to Customer Inquiries

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 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:



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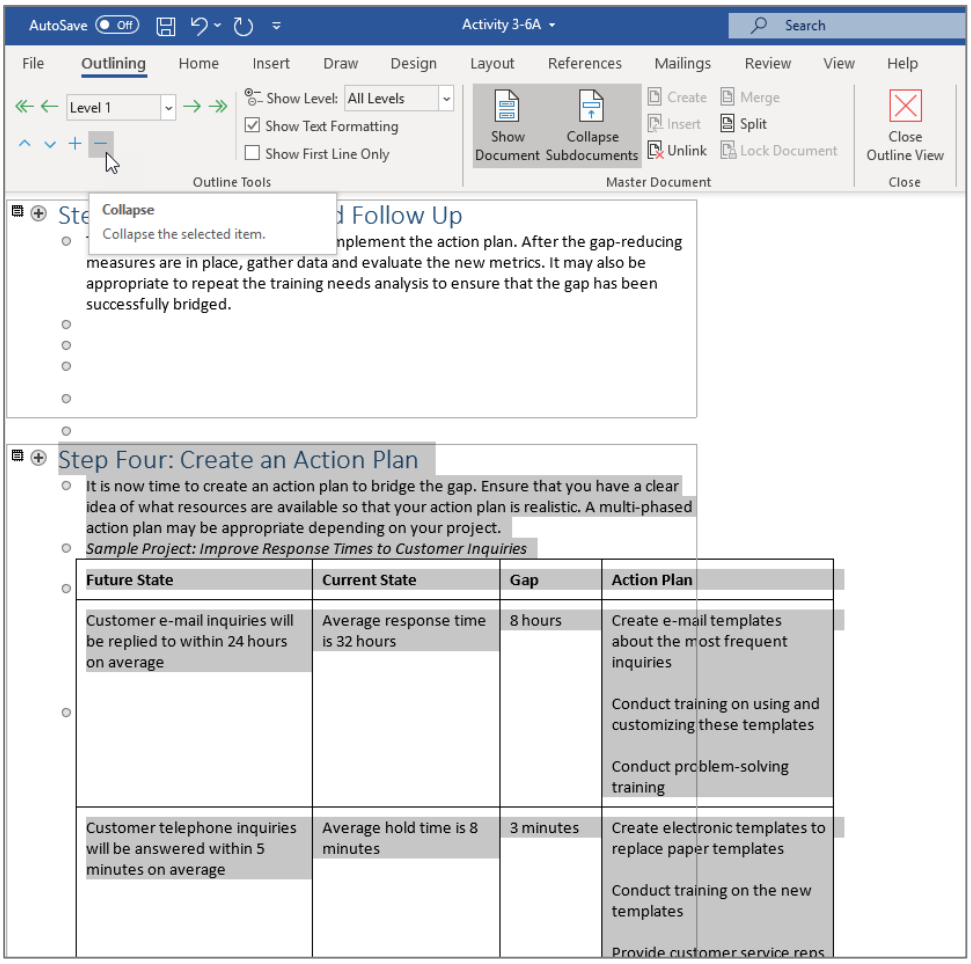
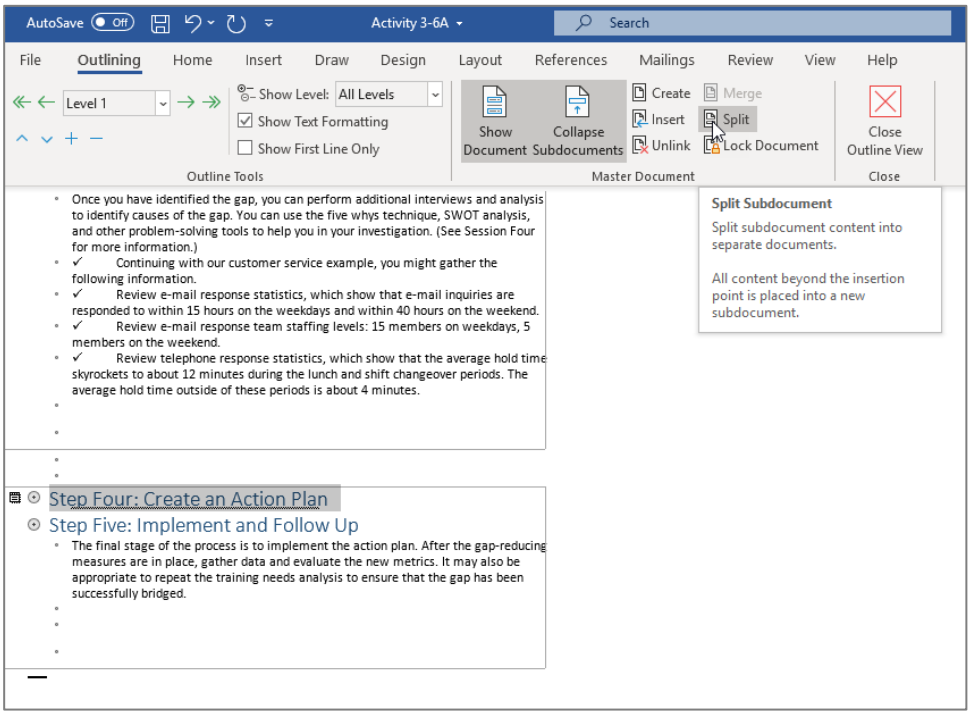
Sample Project: Improve Response Times to Customer Inquiries

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

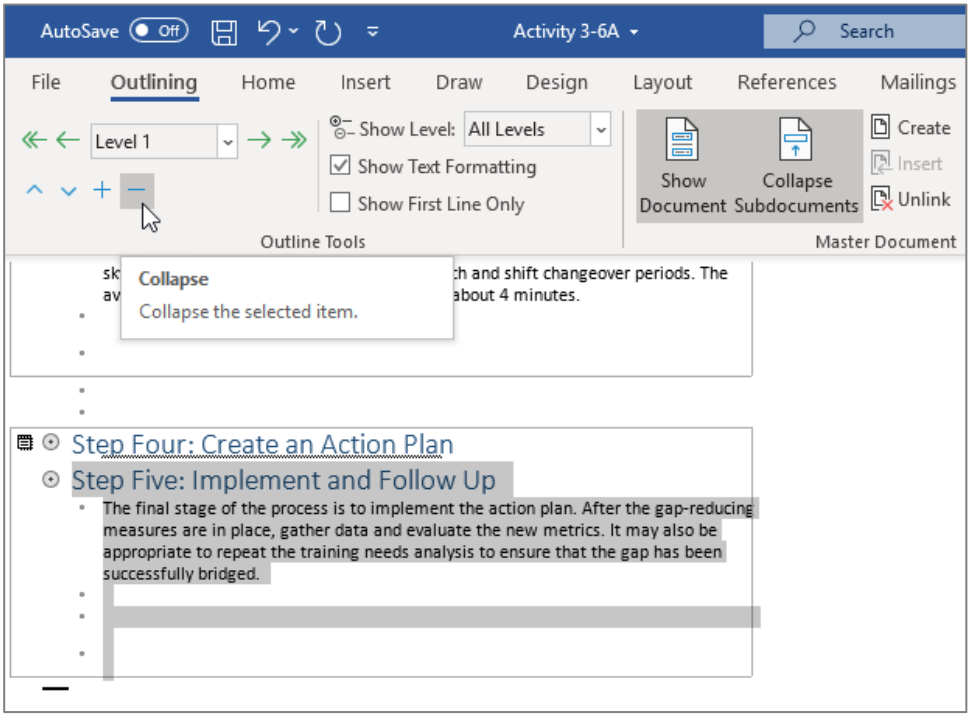
15. The steps will be in the right position. **Click the document icon** to ensure that the subdocument is selected. Then, click **Outlining → Collapse**:



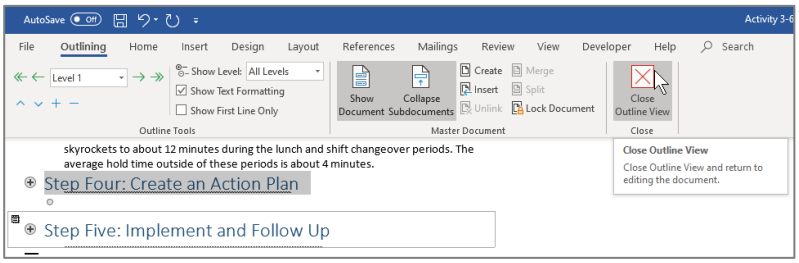
16. Now, let us make this document its own subdocument. Click **Outlining → Split** to do this:



17. Now collapse Step Five:



18. The document is now complete. Click **Outlining → 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:

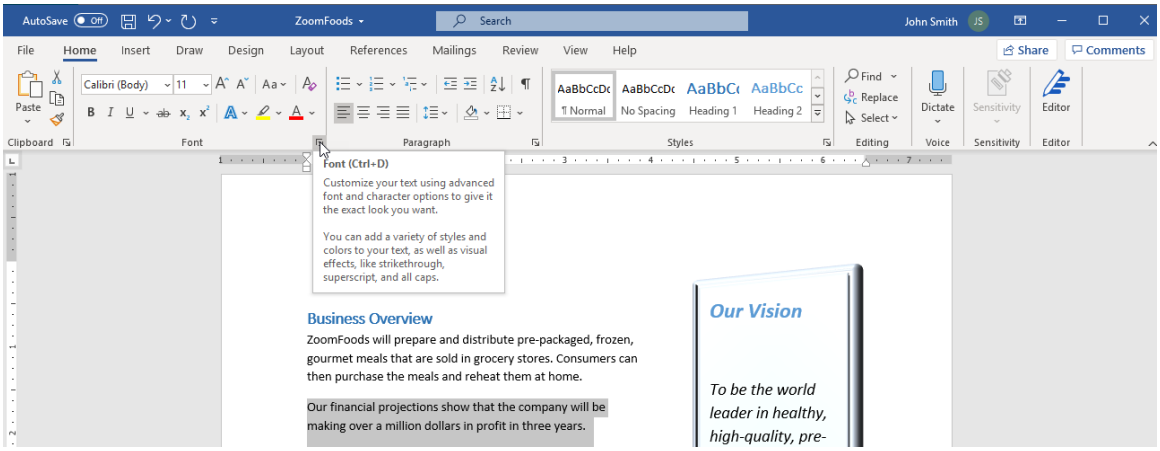
- How to suppress sensitive information in a document
- How to format text as hidden
- How to remove personal information from a document
- How to use the Document Inspector

Suppress Sensitive Information

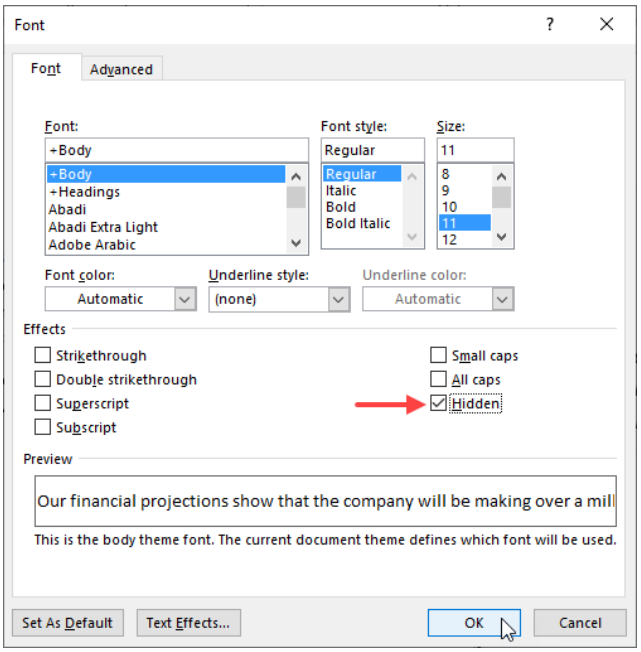
There are a few ways to control how sensitive information is displayed. You can format it as hidden text so that the information is still accessible but not automatically shown. Or, you can remove it from the document entirely so there is no chance of it being accessed.

Hidden Text

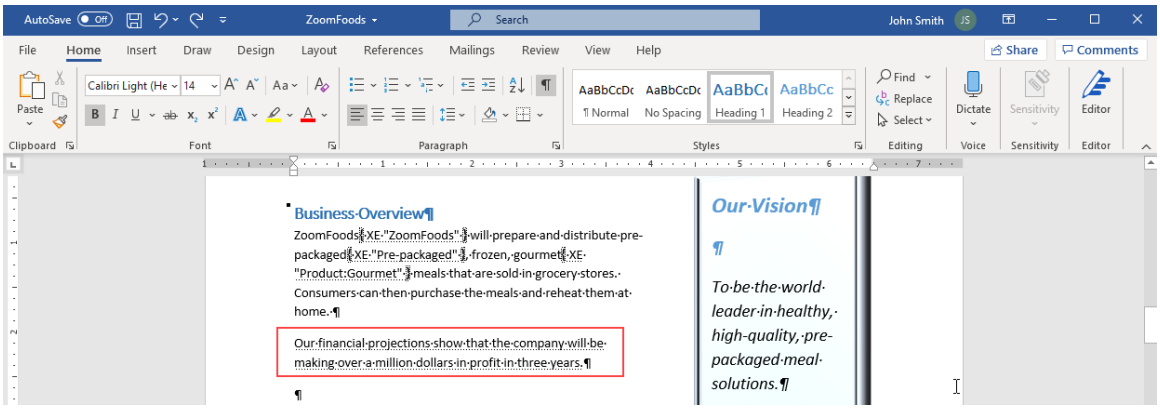
You can format text as hidden using the Font dialog box. To start, select the text that you want to hide. Then, click the option button in the Font group of the Home tab or use the **Ctrl + D** shortcut:



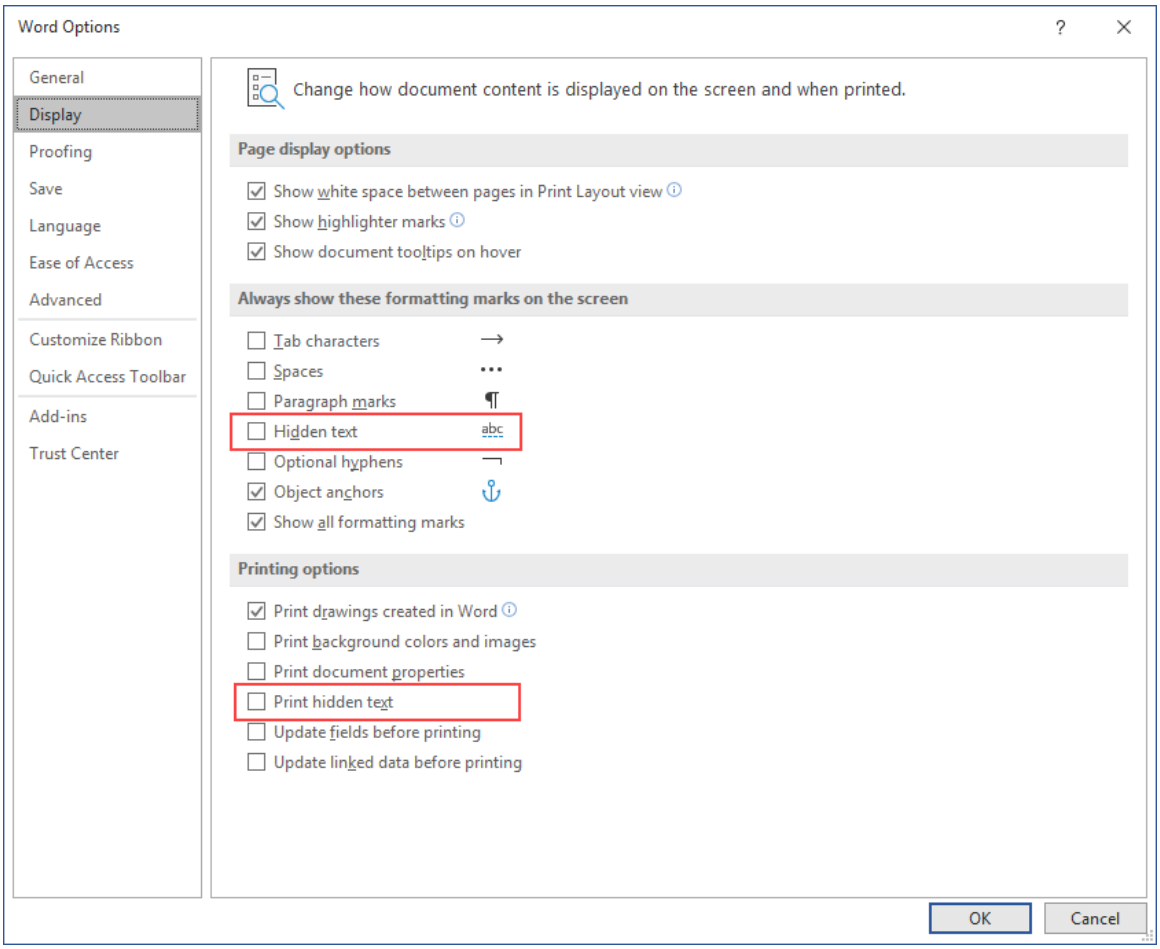
The Font dialog box will open. Check the "**Hidden**" box and click **OK**:



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

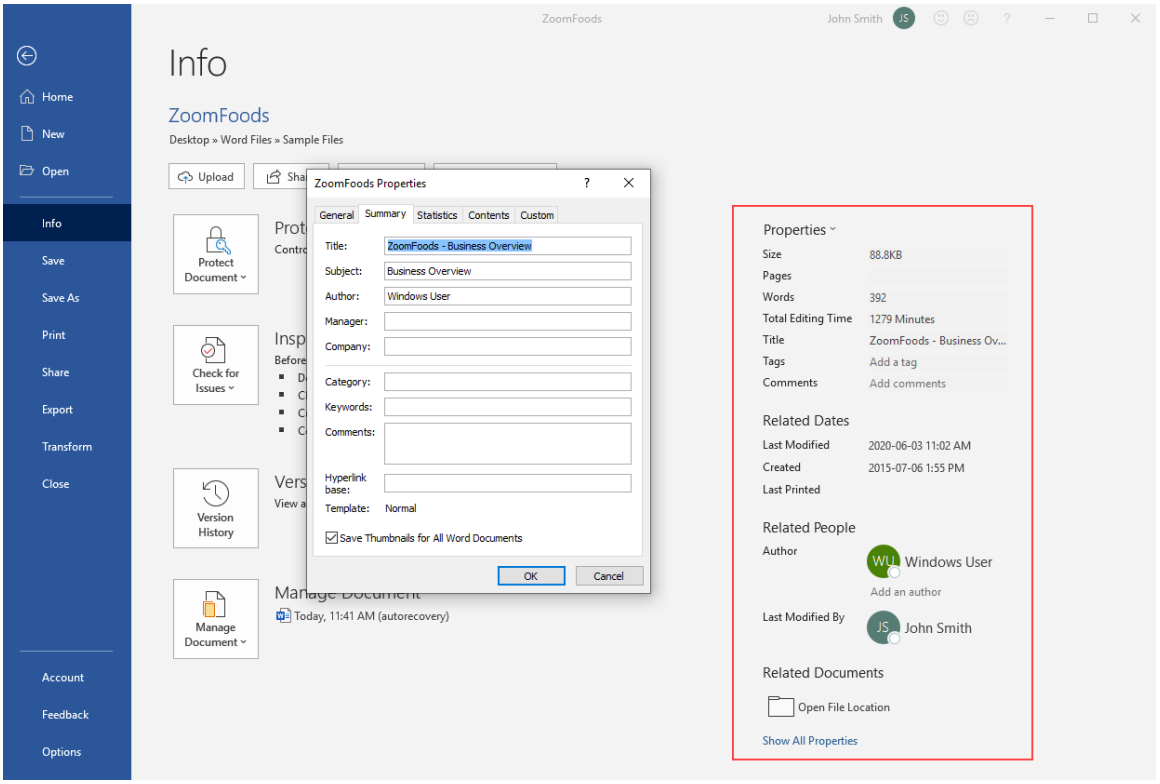


You can choose to always display hidden text and/or to print it via the **Display** category of the Word Options dialog box:



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**):

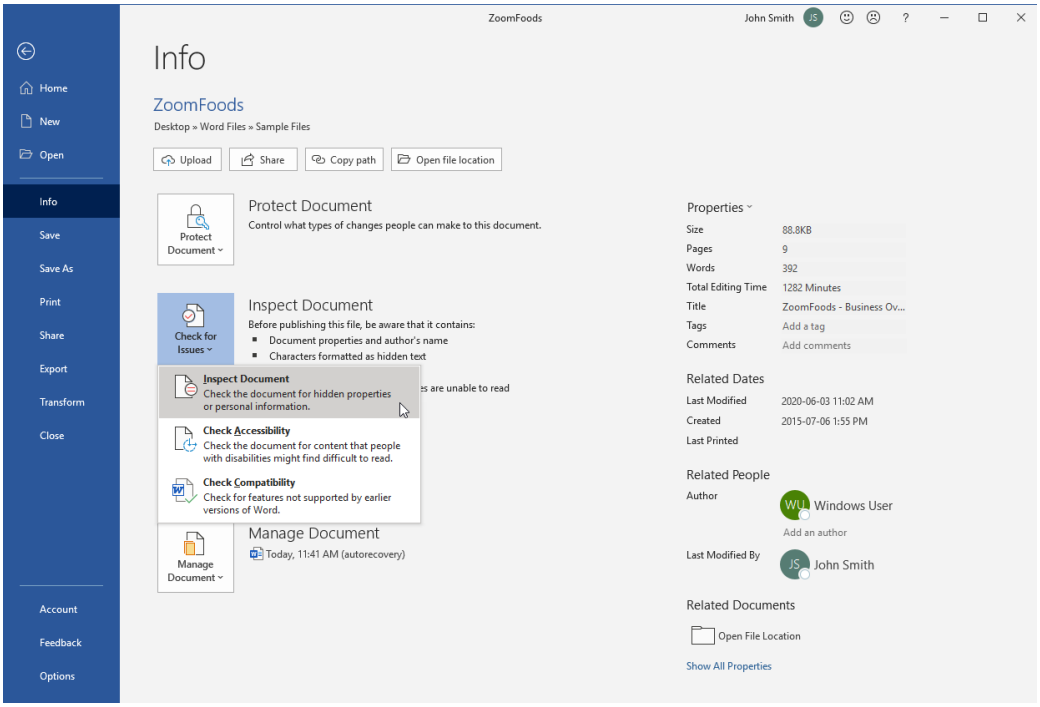


You can remove information from these fields as desired.

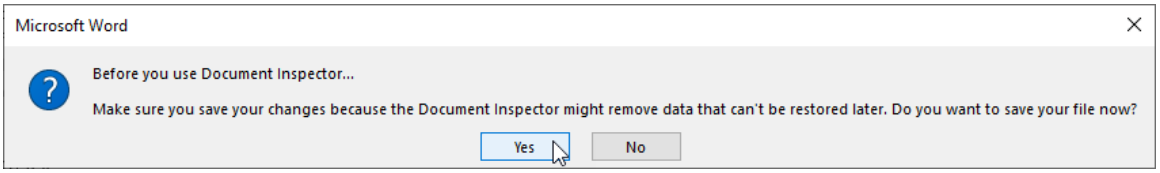
The Document Inspector Dialog Box

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.

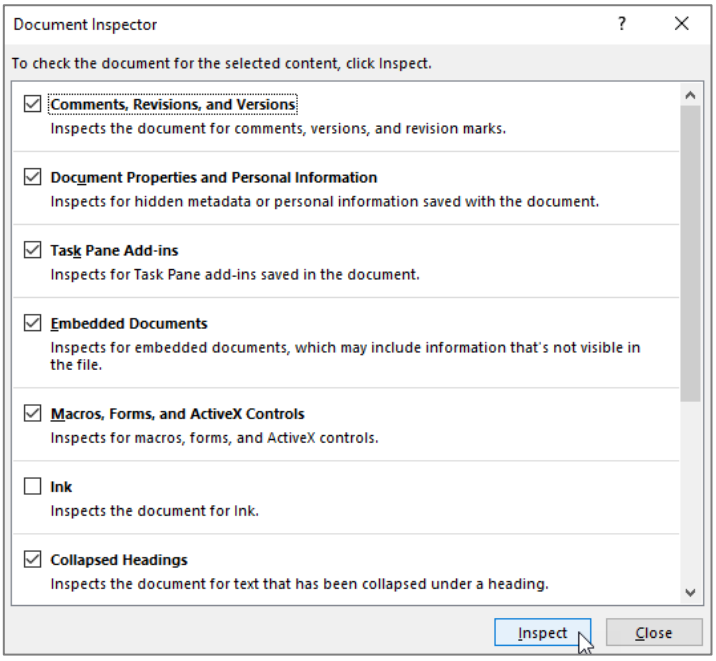
To begin, click **File → Info → Check for Issues → Inspect Document**:



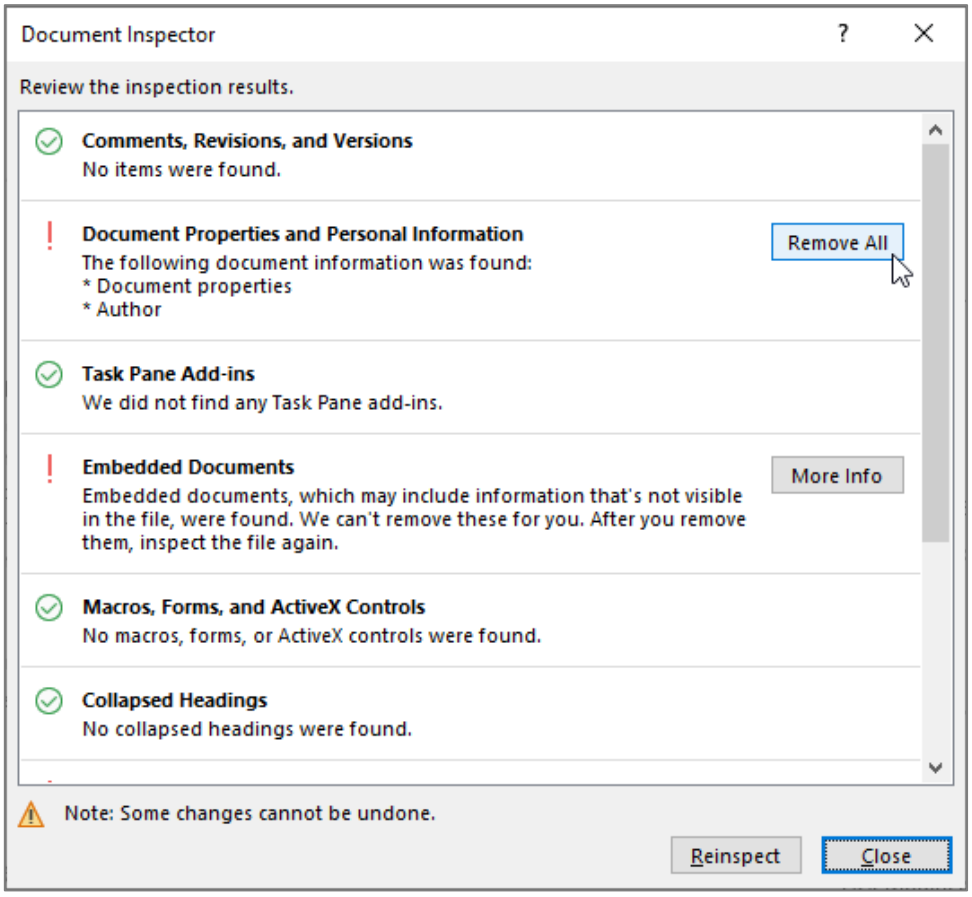
You will be instructed to save the file if you have not already done so:



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:



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:

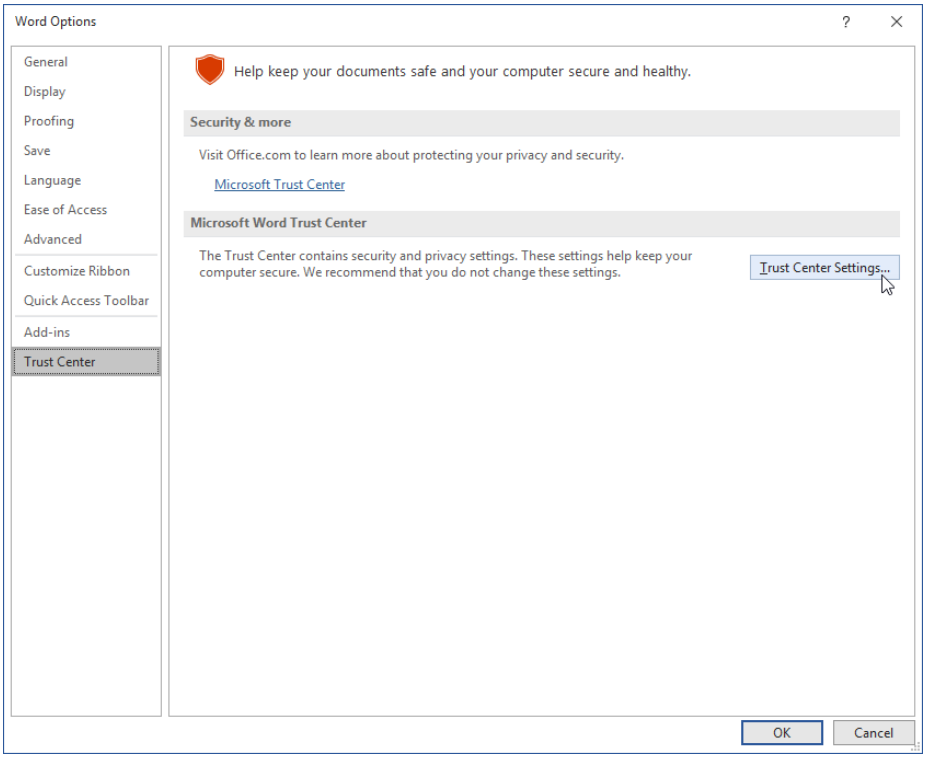


If you do choose to remove any personal data, we recommend that you run the Document Inspector again to ensure that everything you want removed is taken care of.

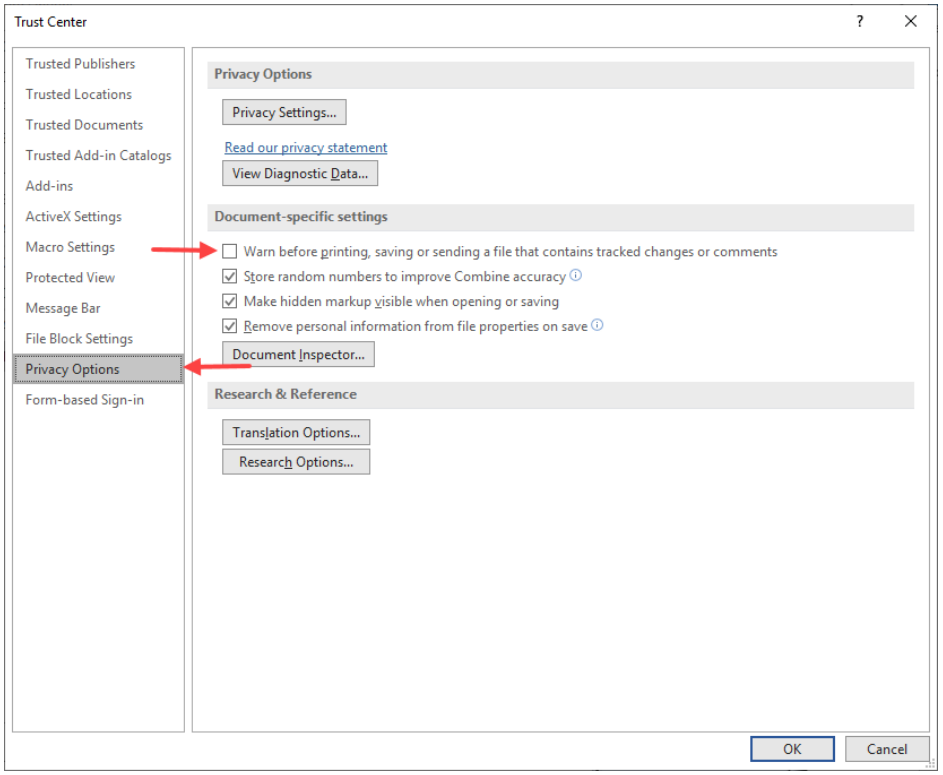
Tracked Changes Security Issues

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:



The Trust Center will open. Click the **Privacy Options** category and check the option relating to tracked changes:



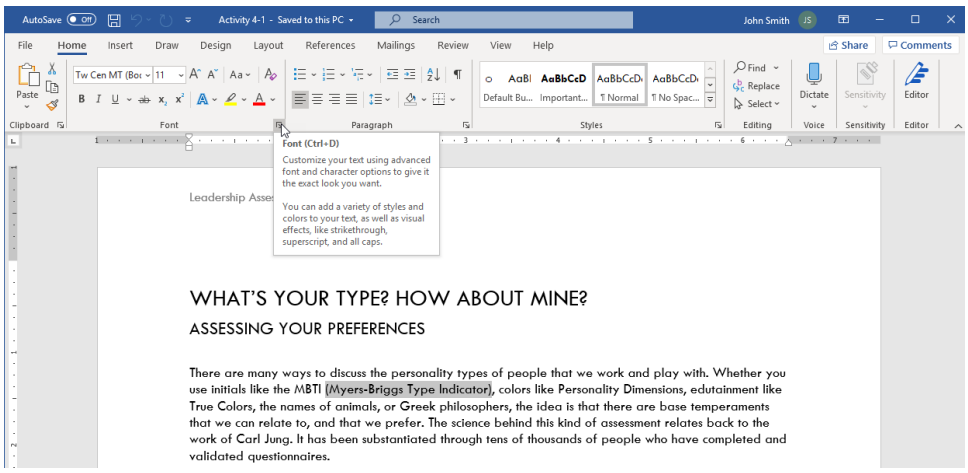
Click **OK** in all open dialog boxes to save this change.

Activity 4-1: Suppressing Information

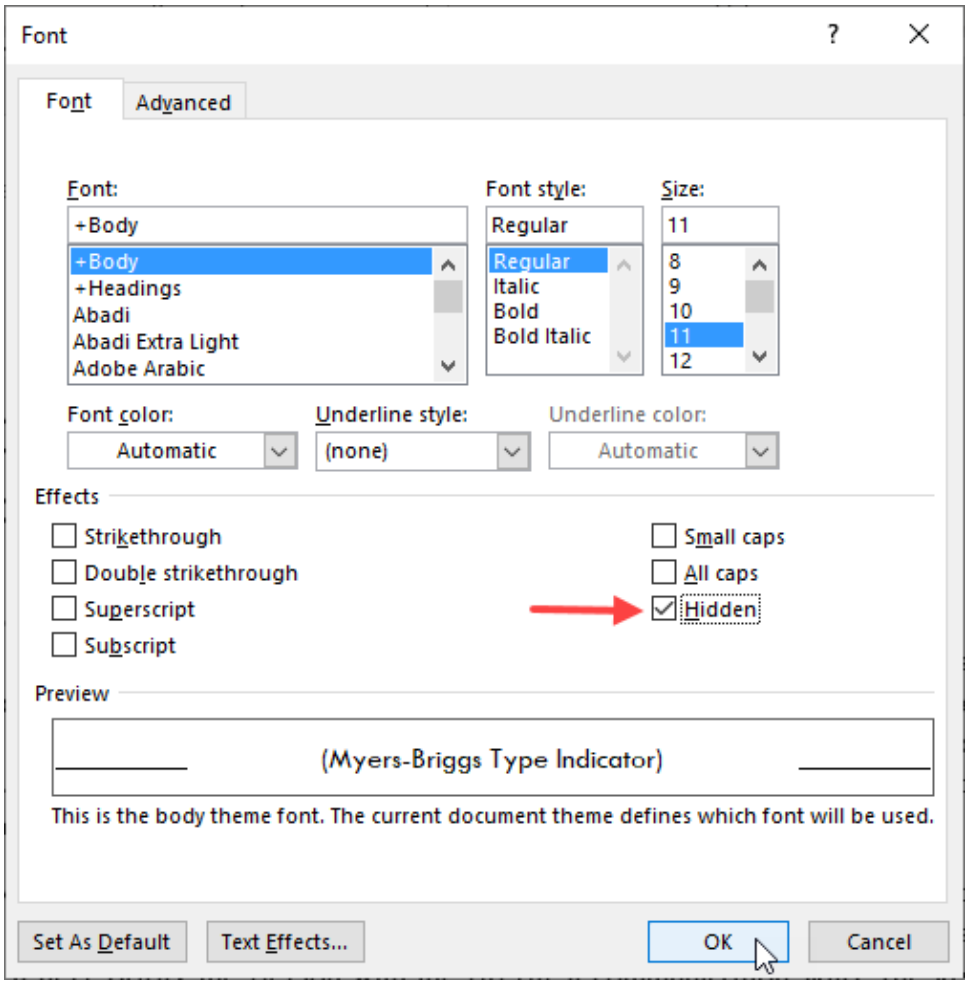
In this activity, you will test the capabilities of the Document Inspector.

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

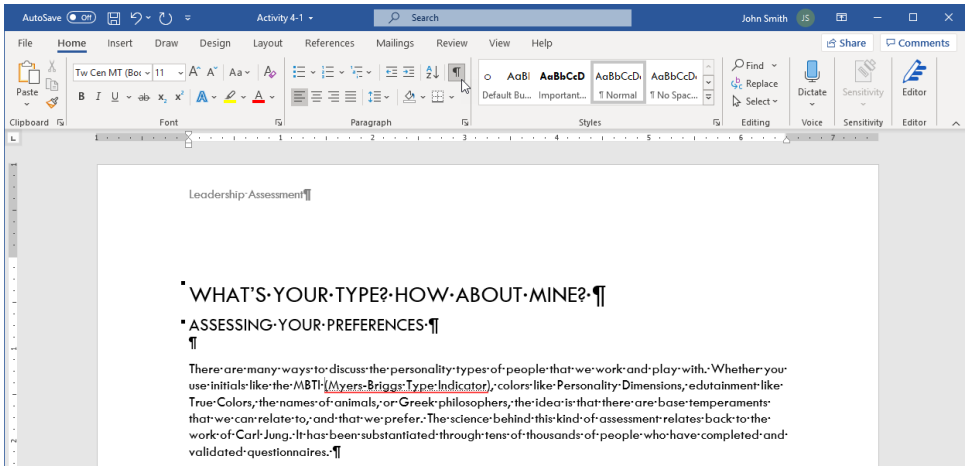
2. First, let us mark some text as hidden. Select the words "**(Myers-Briggs Type Indicator)**" in the second sentence on the first page. Click the option button in the Font group of the Home tab:



3. Check the "**Hidden**" box and click **OK**:

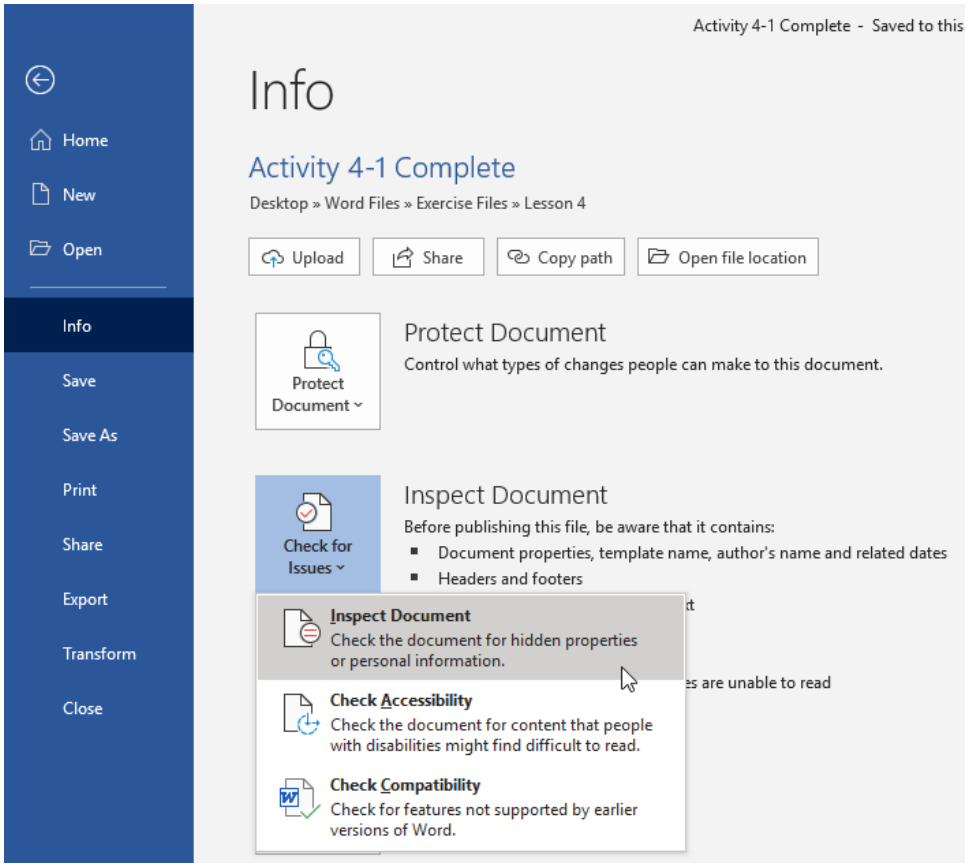


4. The text will now be marked as hidden. Click **Home → Show/Hide** to see it:

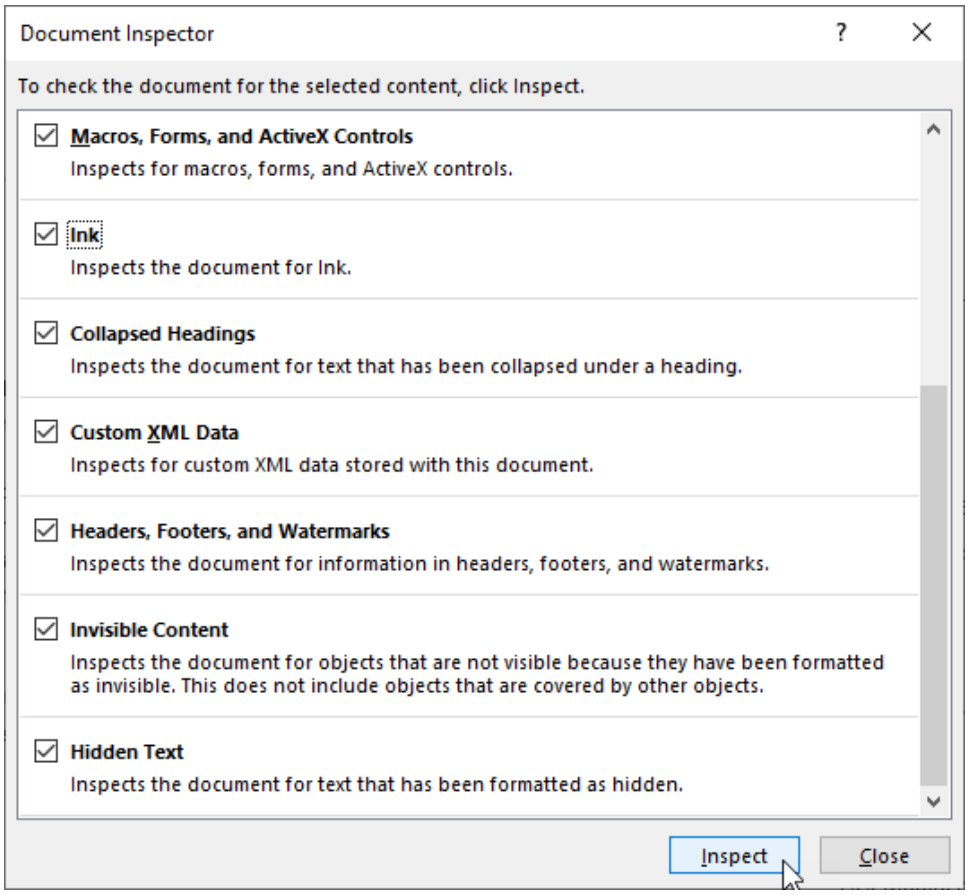


5. Now, let us run the Document Inspector. **Before we do this, save your document** as Activity 4-1 Complete.

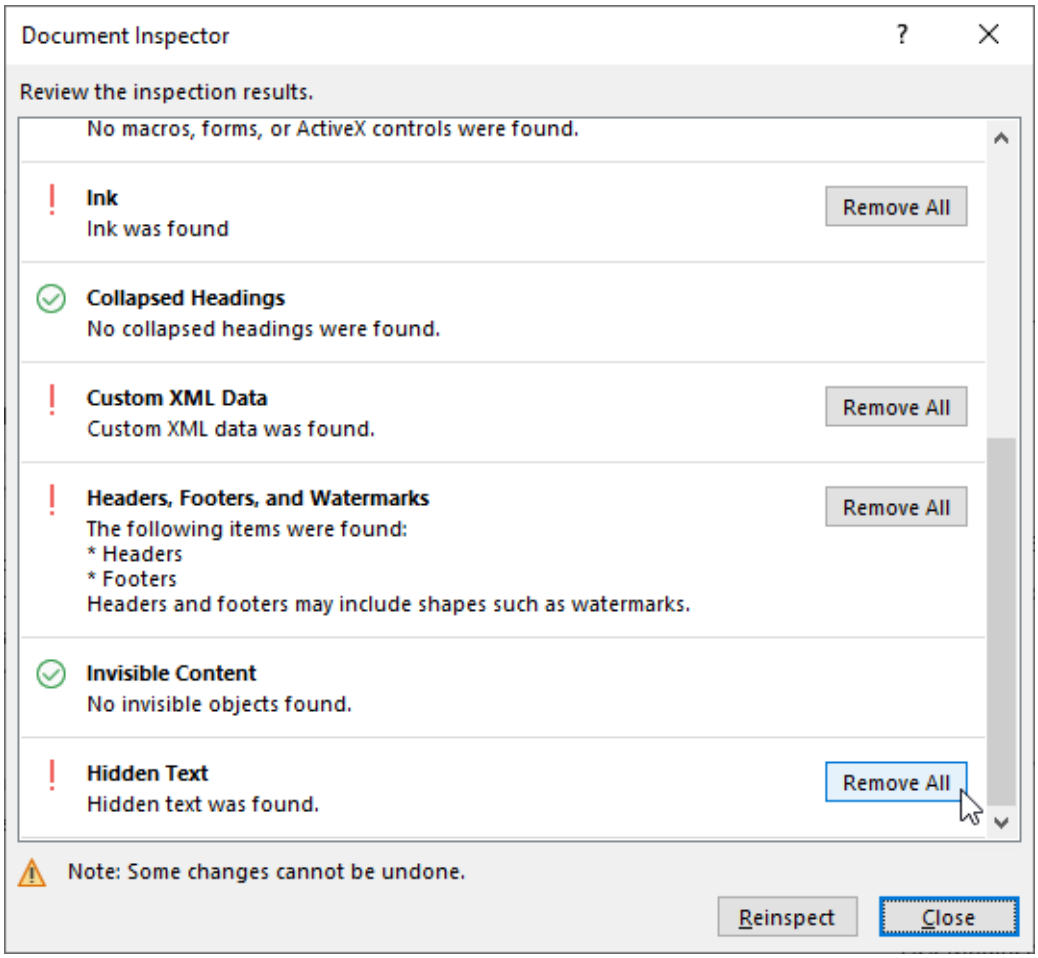
6. Click **File → Info → Check for Issues → Inspect Document**:



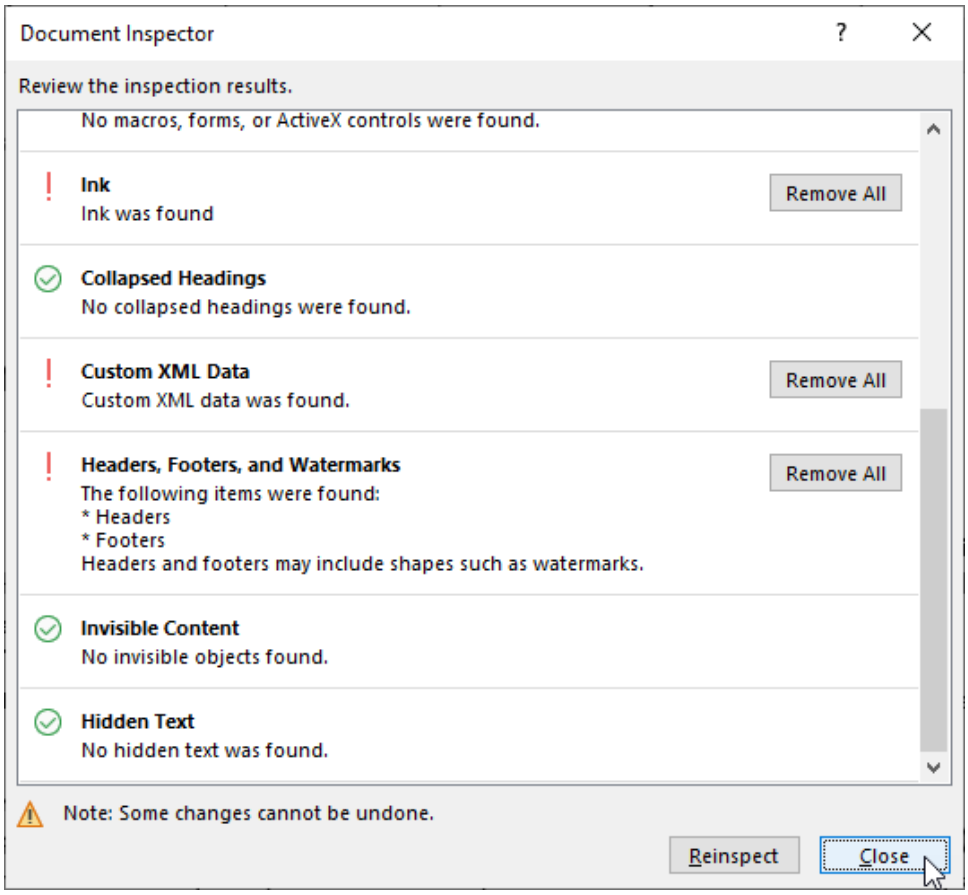
7. The Document Inspector will open. Ensure that all items are checked and click **Inspect**:



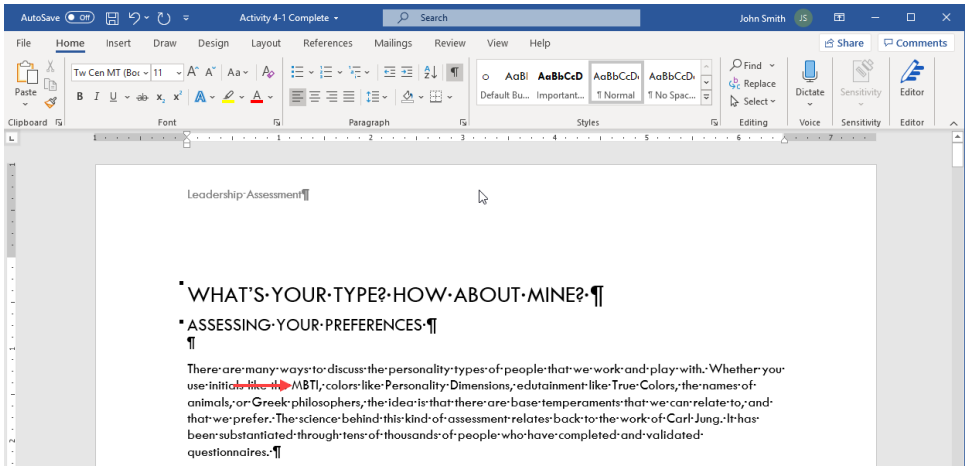
8. Scroll down to the bottom of the dialog box. Click **Remove All** next to the Hidden Text entry:



9. The other items can be left in the document. Click Close:



10. Back in the document, you can see that the hidden text has been completely deleted:



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.

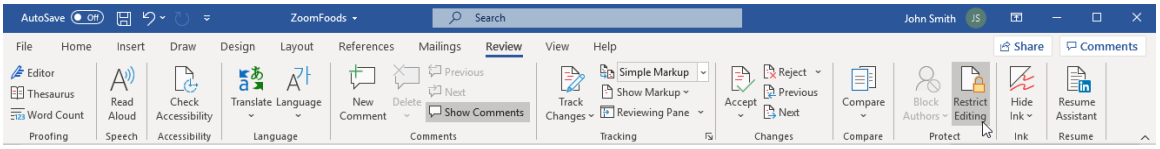
Topic Objectives

In this session, you will learn:

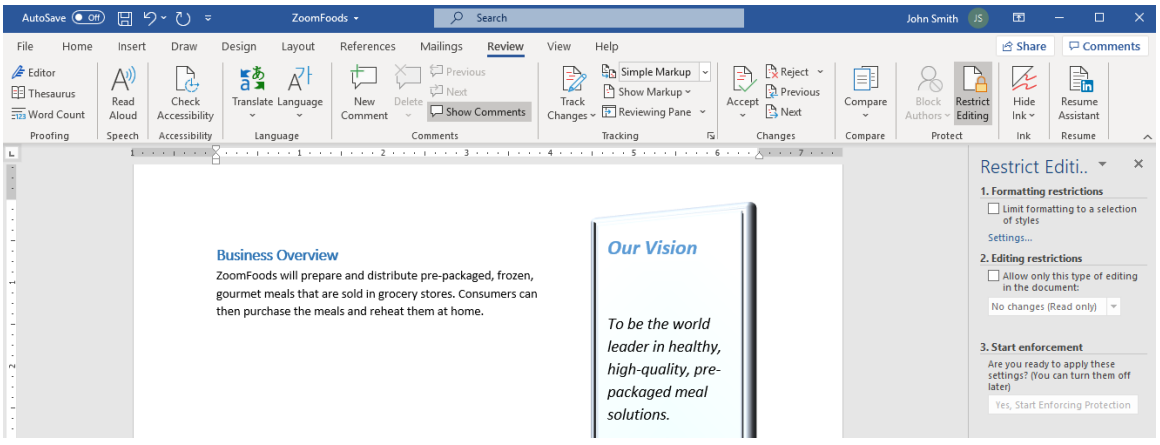
- How to use the Restrict Editing task pane
- About Protected View
- How to mark a document as final

The Restrict Editing Task Pane

To open the Restrict Editing task pane, click **Review → Protect → Restrict Editing**:

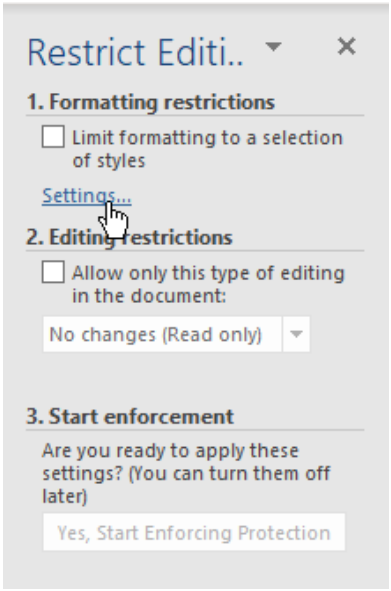


Then, you will see the **Restrict Editing** task pane appear on the right-hand side of the window:

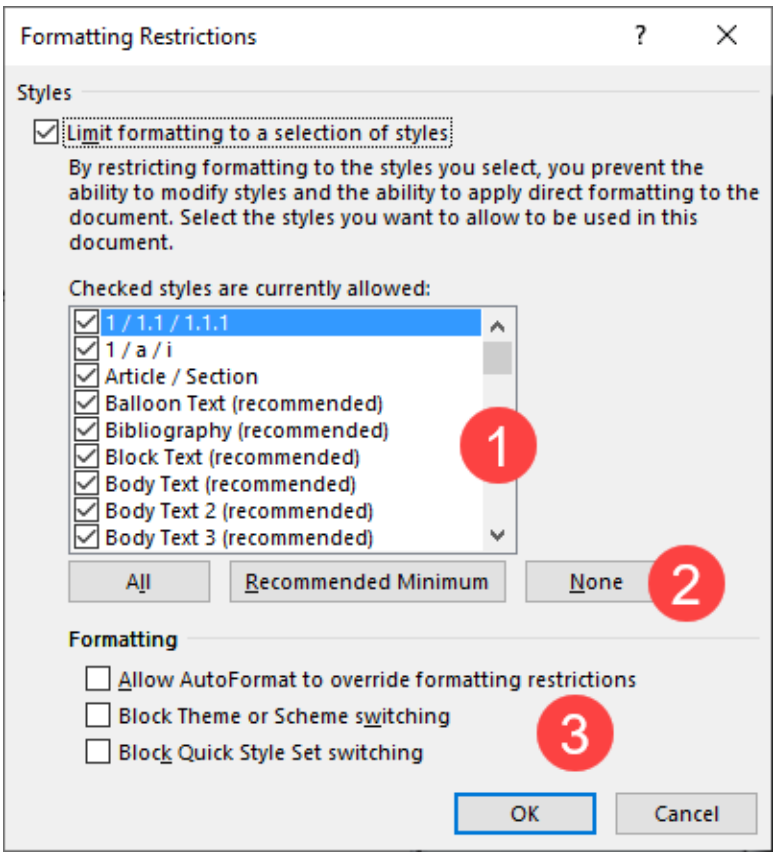


There are three steps to this task pane. You can choose any options in Step 1 and/or 2, and then finalize your choices with Step 3.

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:

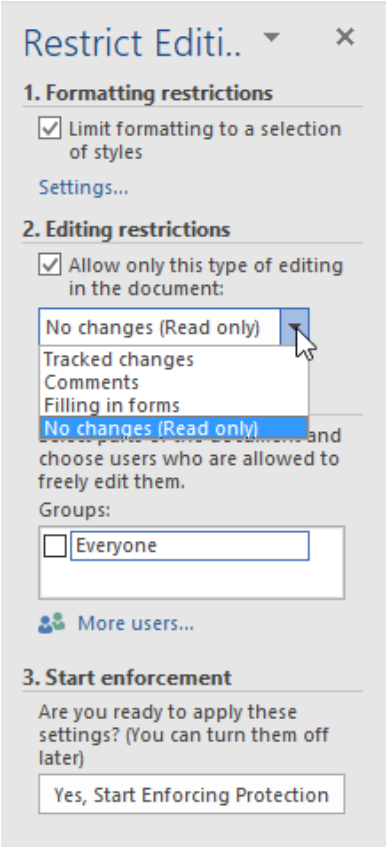


In the **top part of the dialog box (1)**, you can check styles that you want to be used in the document and uncheck those that you do not want used. You can also click the **All, Recommended**

Minimum, or **None buttons (2)** to check all styles, a minimum number of suggested styles, or no styles, respectively.

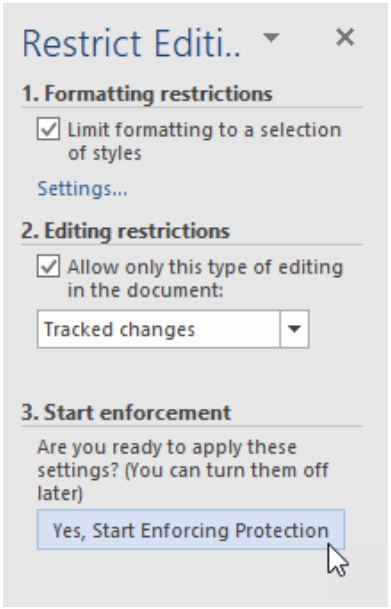
The bottom of the dialog box also offers you **options** to enable or disable AutoFormat, schemes, themes, and style sets **(3)**. Once you have put your restrictions in place, click the **OK** button to apply them.

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:

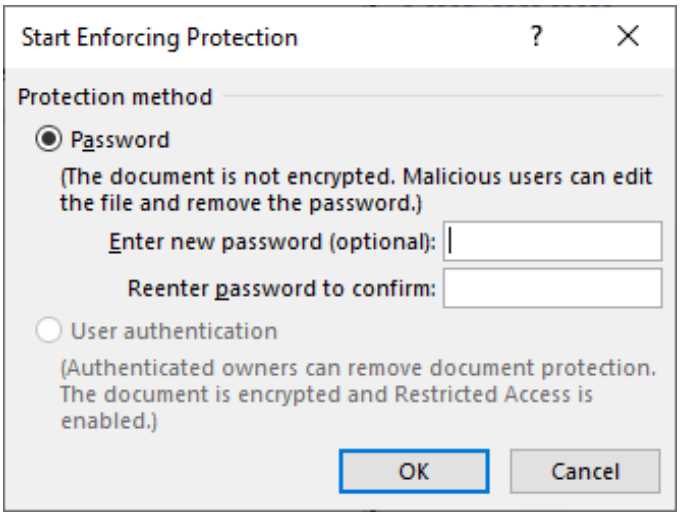


Depending on the option you choose, you may have additional options to specify. For example, if you choose “Filling in forms” you will have the option to unprotect certain sections in the document. If you choose “No changes (Read only)” or Comments, you will be allowed to set exceptions for these rules. (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**.



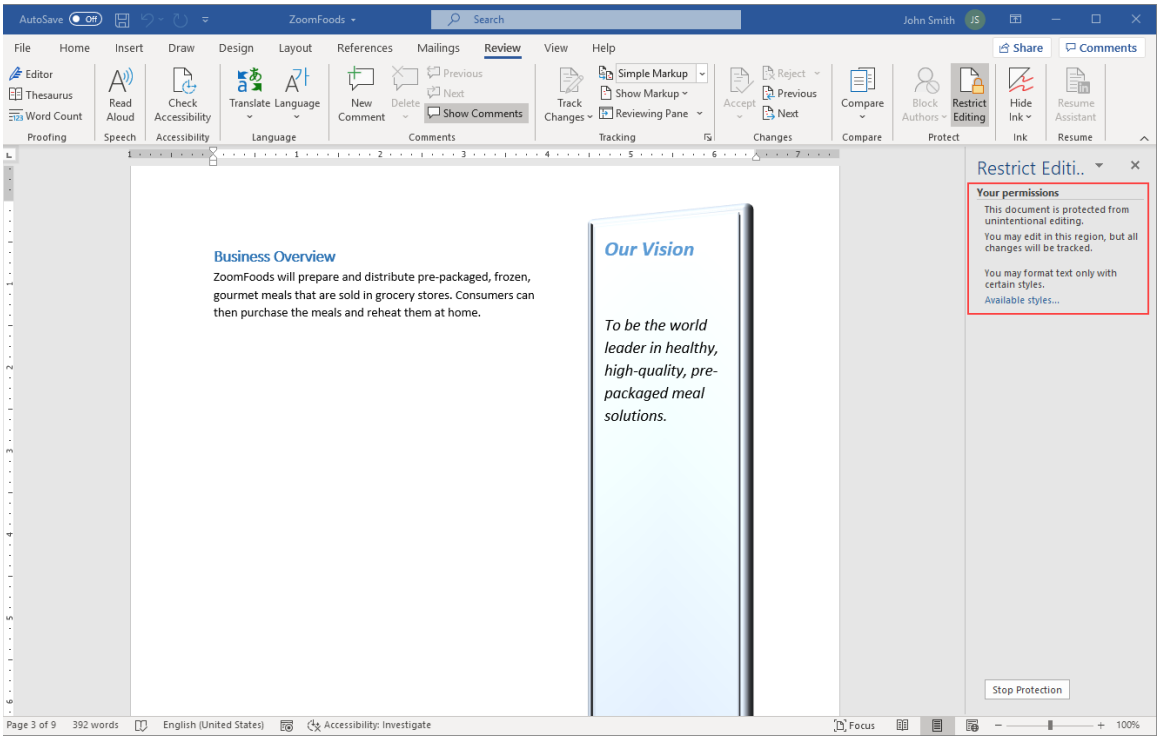
You will then see this dialog box:



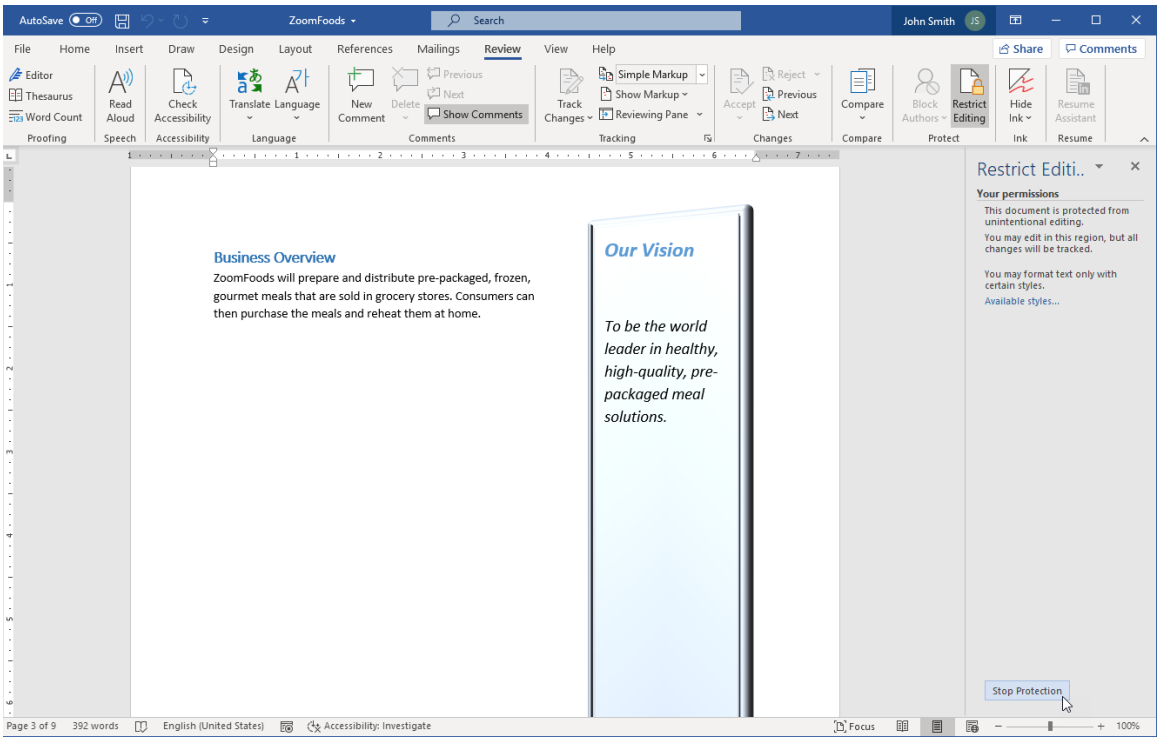
The **Start Enforcing Protection** box offers two protection methods. If you are going to share the document with people outside of your organization's network, we recommend that you set a password. This allow certain users, with whom you share the password, to remove document protection. You can leave 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:



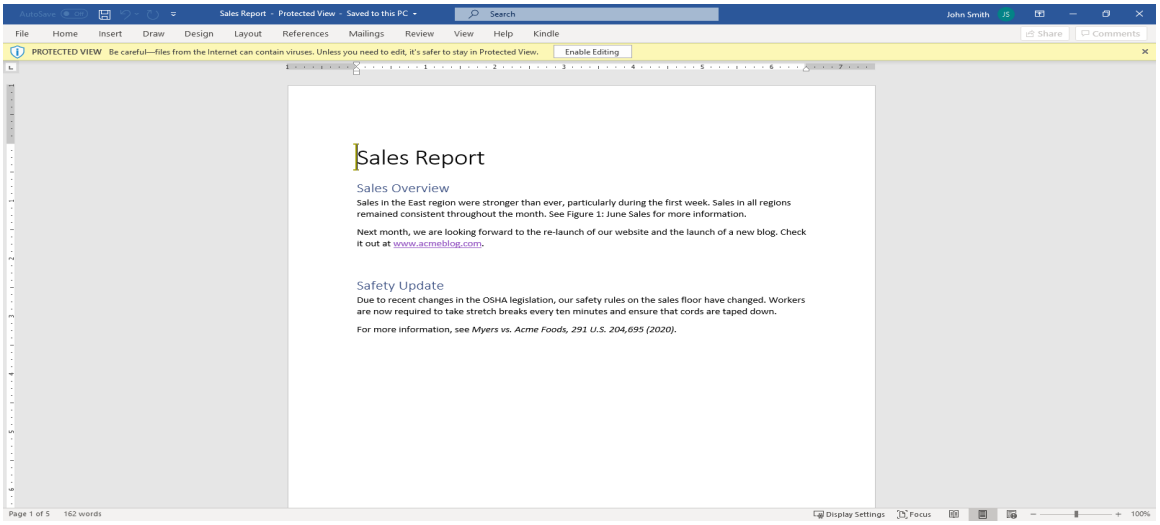
Document restrictions can be turned off with the **Stop Protection** command in the Restrict Editing task pane:



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.

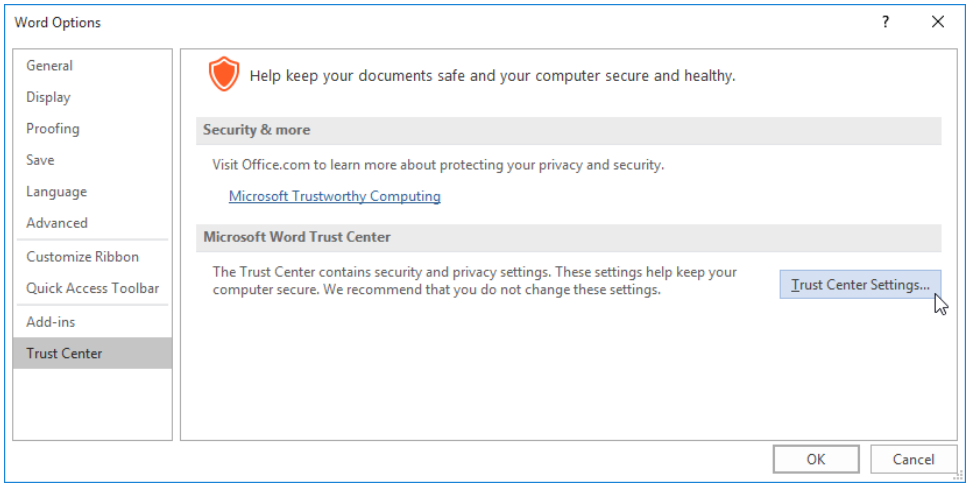
Protected View

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**:

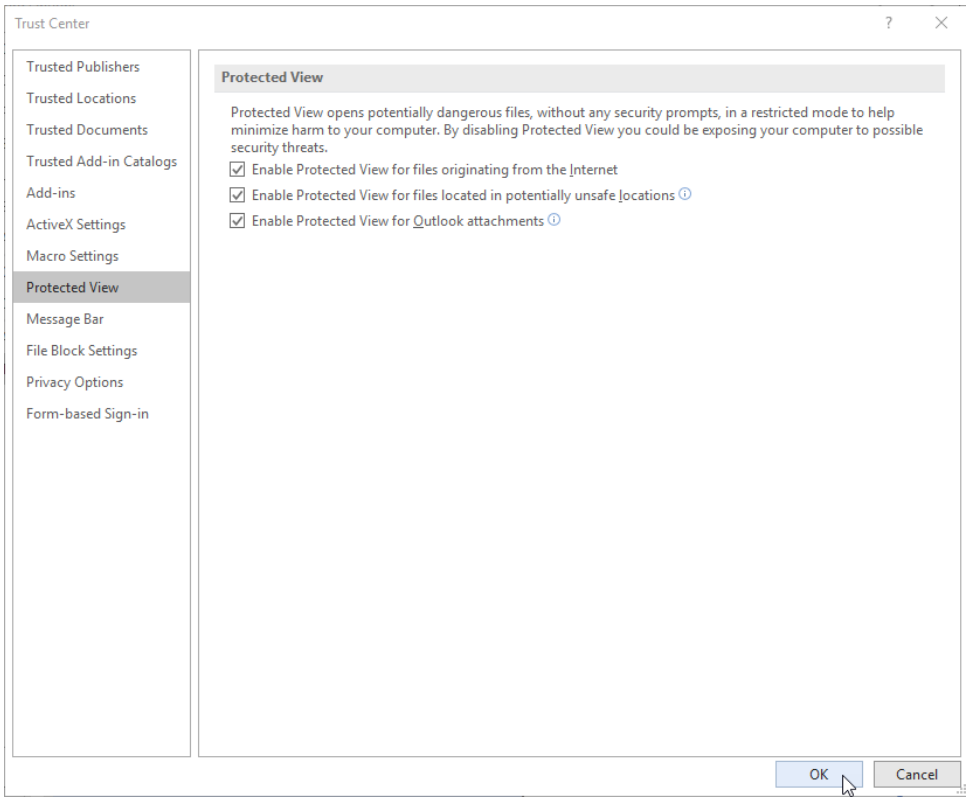


This prevents malicious content from running and protects your computer. If you trust the file, click Enable Editing on the Message Bar to begin working with it. Otherwise, click **File → Close** to close the file.

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**:

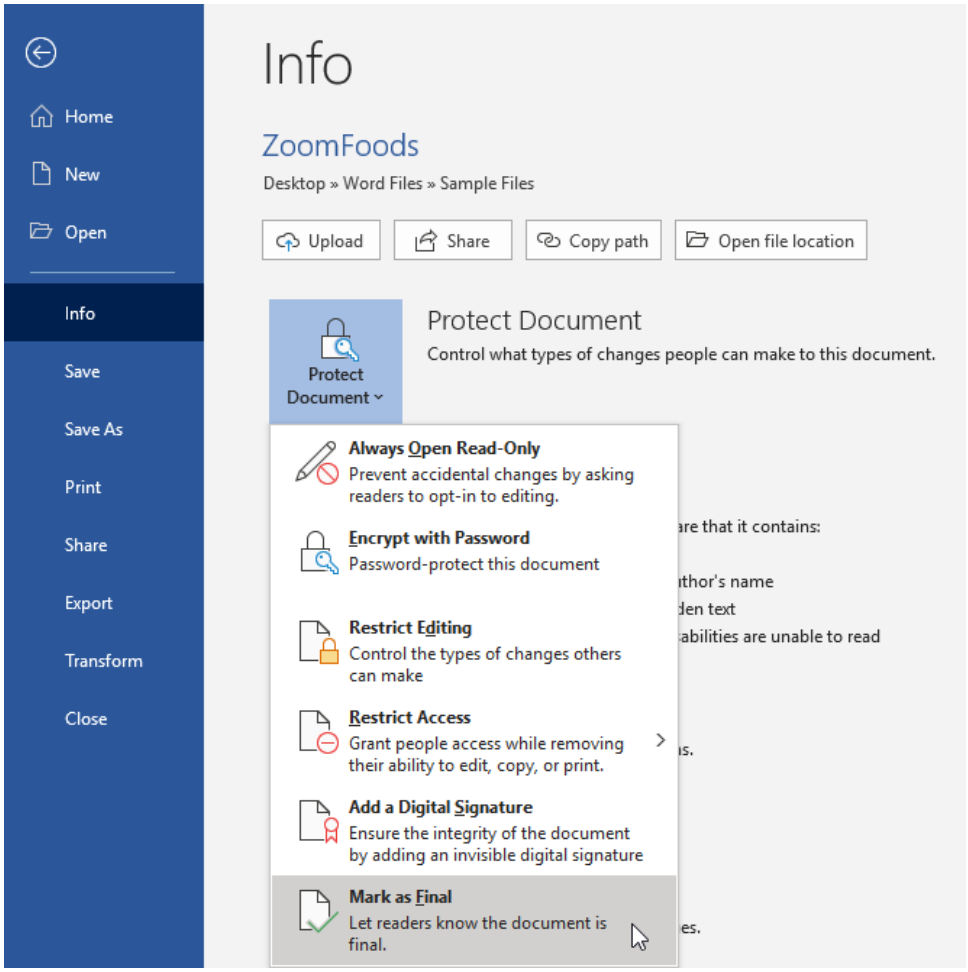


Set your options as desired and click **OK** in all open dialog boxes to save your changes.

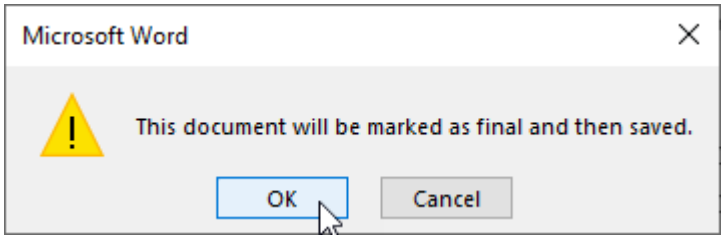
Mark as Final

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.

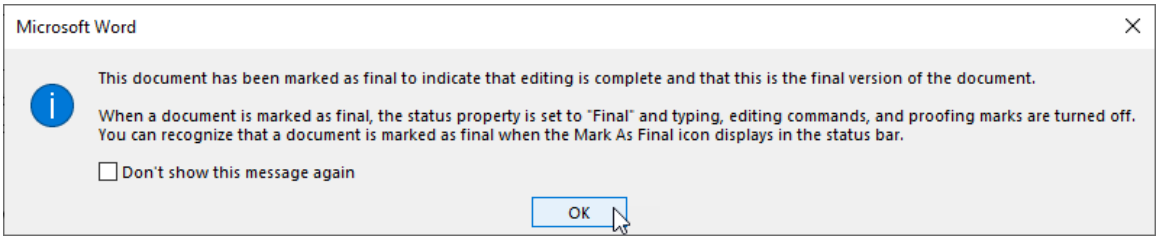
To mark a document as final, click **File → Info → Protect Document → Mark as Final**:



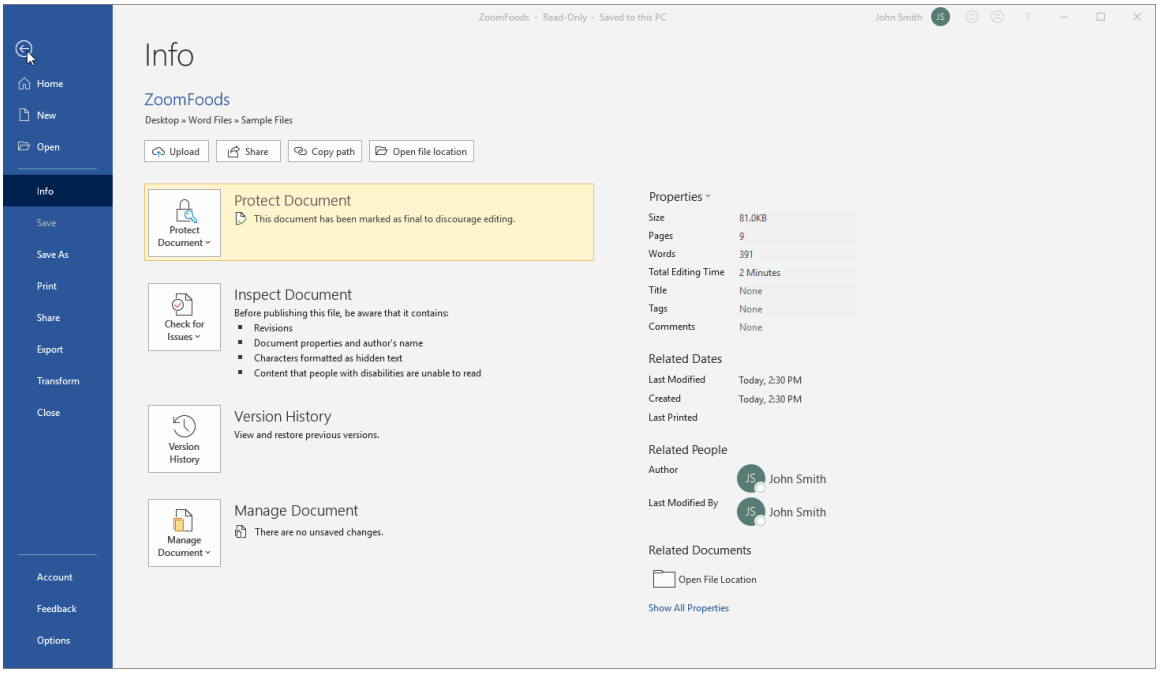
You will be warned of the action you are about to take. Click **OK**:



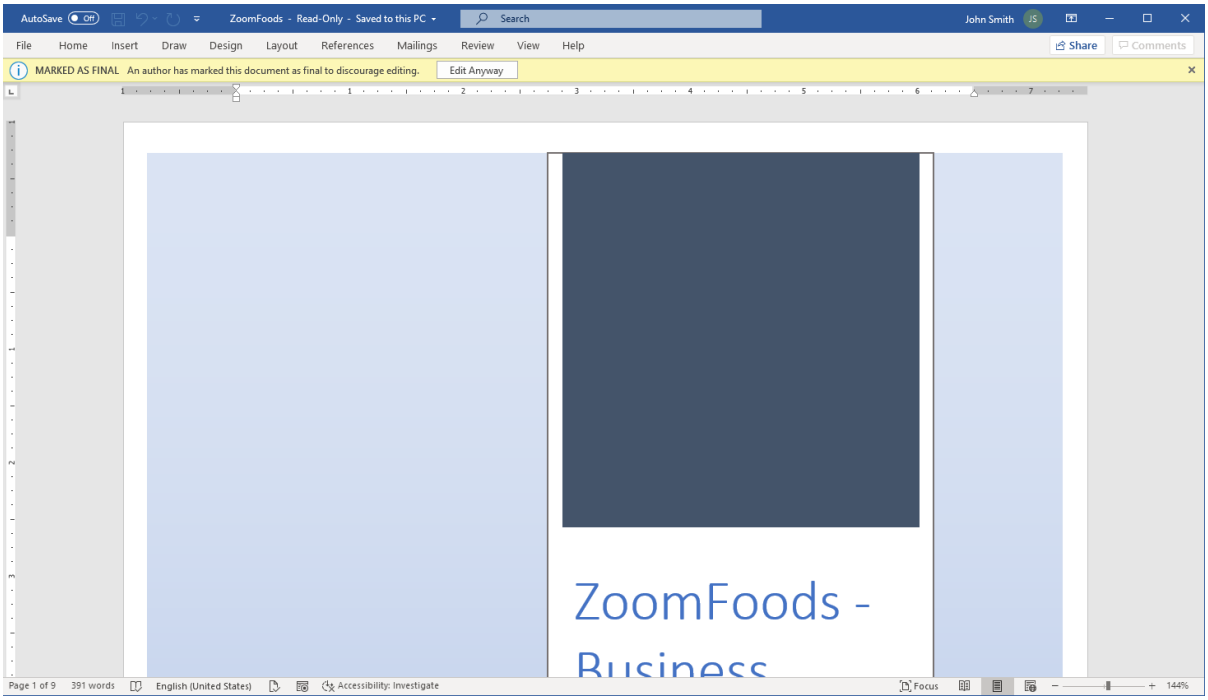
Another explanation will appear stating that some commands are now turned off. Click **OK** to dismiss this dialog box:



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:



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:



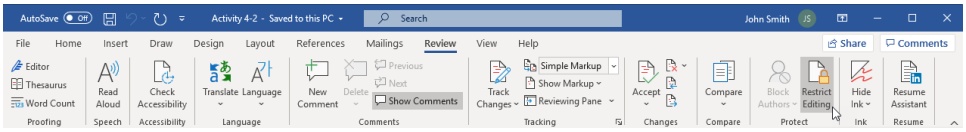
Note that you can easily remove this status by clicking "**Edit Anyway**" in the Message Bar.

Activity 4-2: Setting Editing Restrictions

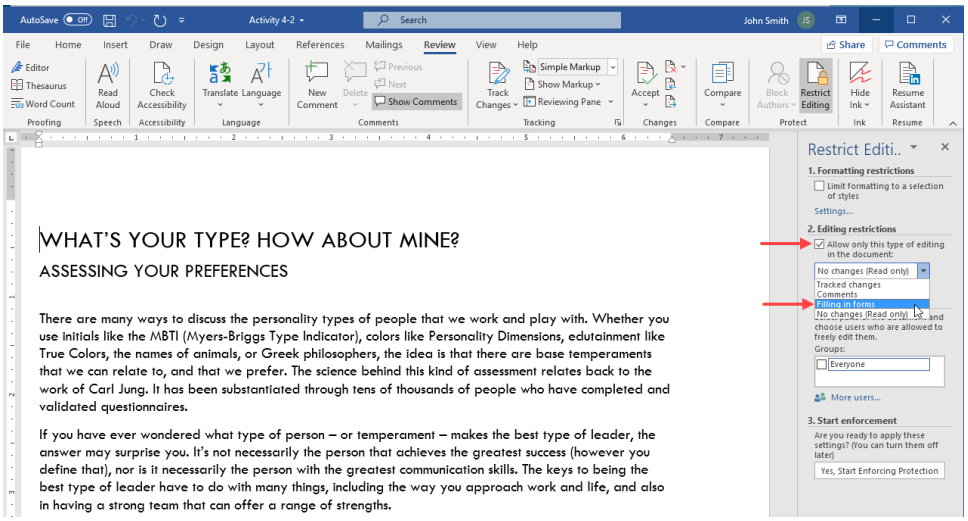
In this activity, you will restrict editing in a questionnaire.

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

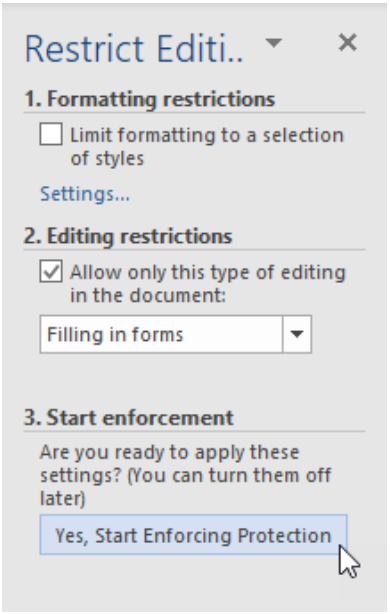
2. Click **Review → Restrict Editing**:



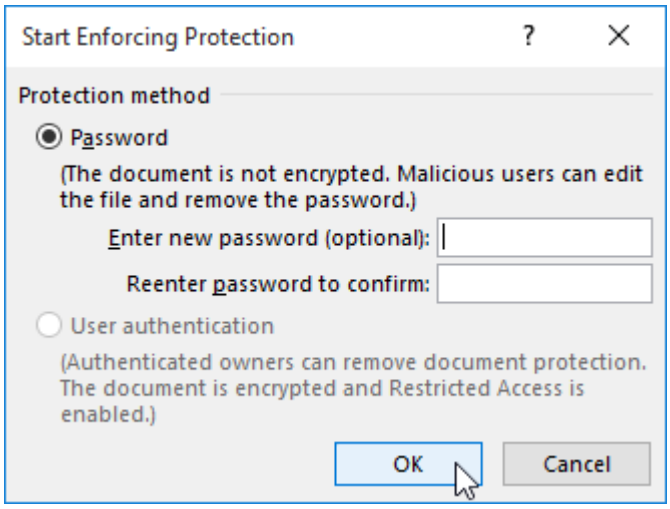
3. The Restrict Editing task pane will open. **Check the box in Step 2** and choose "**Filling in forms**" from the drop-down menu:



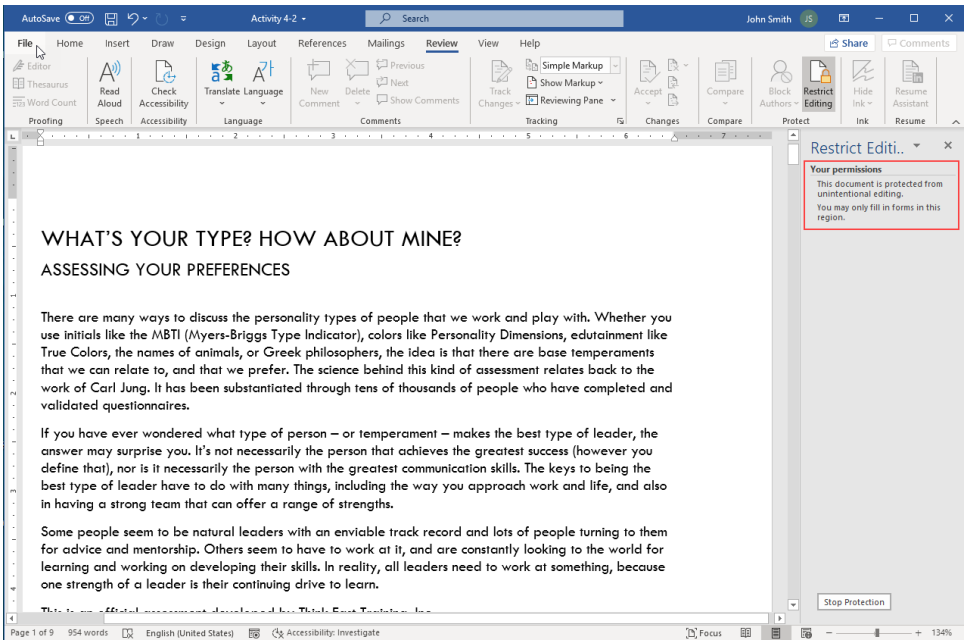
4. Click Yes, Start Enforcing Protection in the task pane:



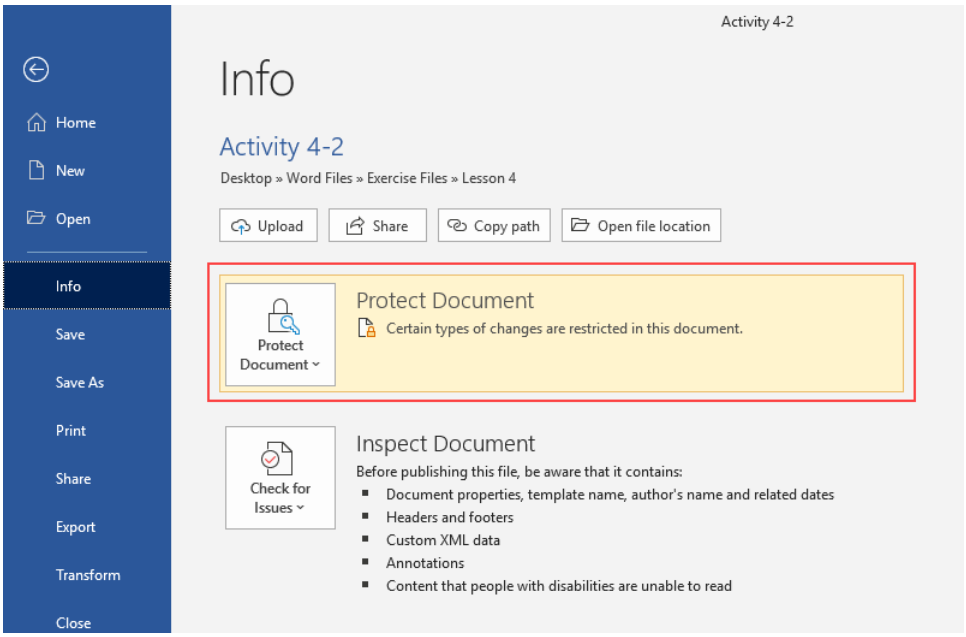
5. Click **OK** to start enforcing protection without applying a password:



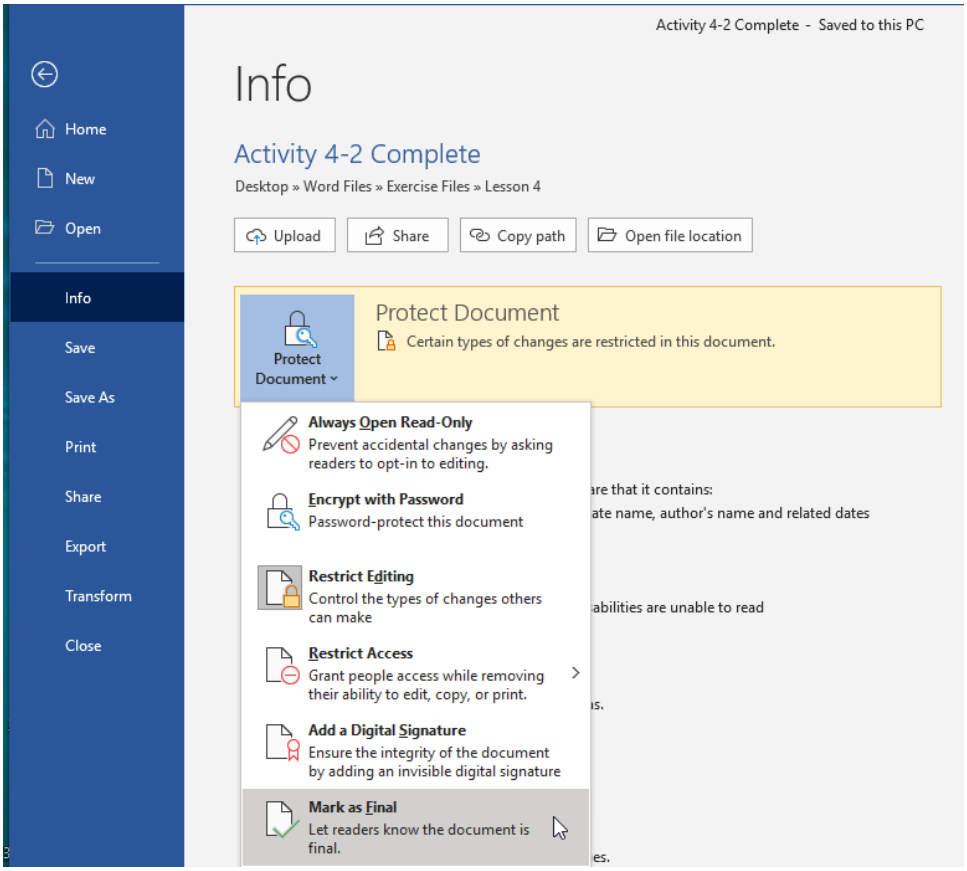
6. Your changes will be reflected in the Restrict Editing task pane. Click the **File** tab:



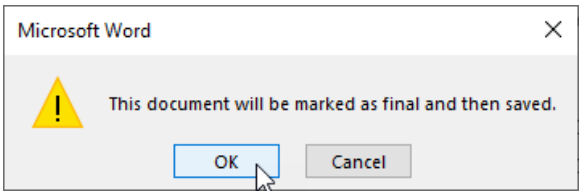
7. You will also see the changes in the Info category:



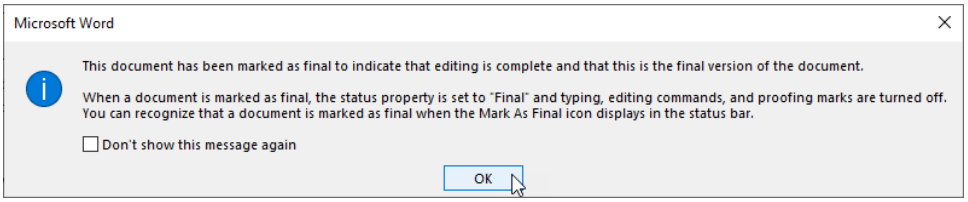
8. Now, let us mark the document as final. Save it as Activity 4-2 Complete before proceeding. Then, click **File → Info → Protect Document → Mark as Final**:



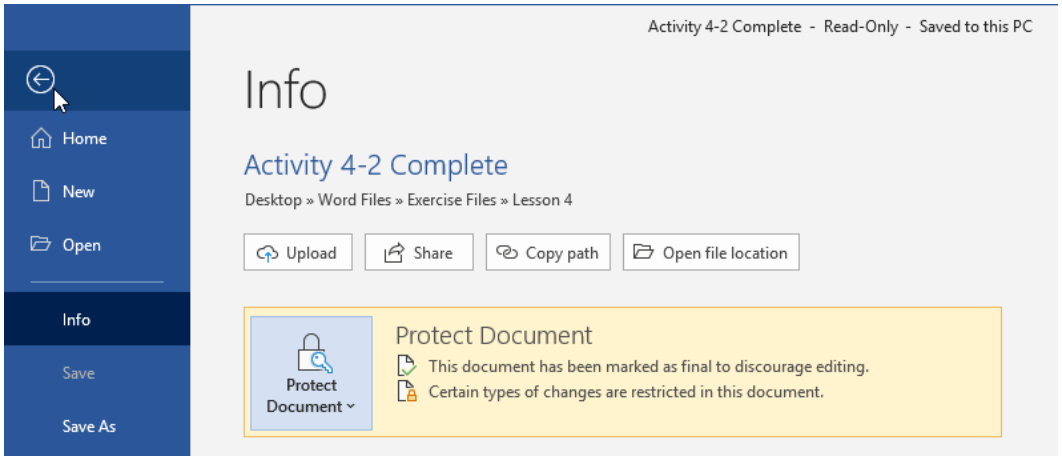
9. Click **OK** to confirm the operation:



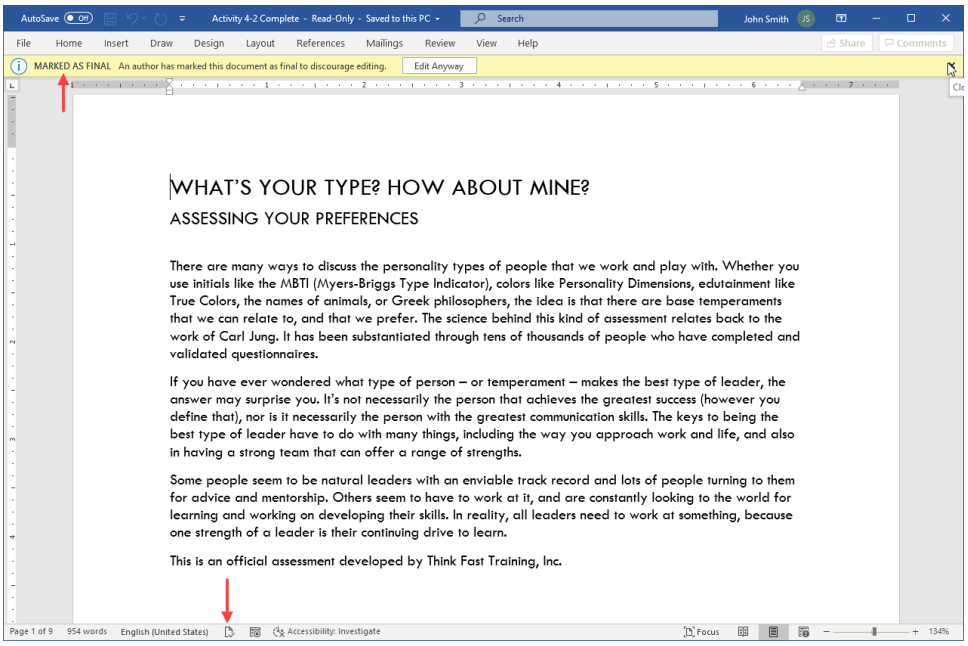
10. Microsoft Word will then explain what the Mark as Final process entails. Read this information and then click **OK** to continue:



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:



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.

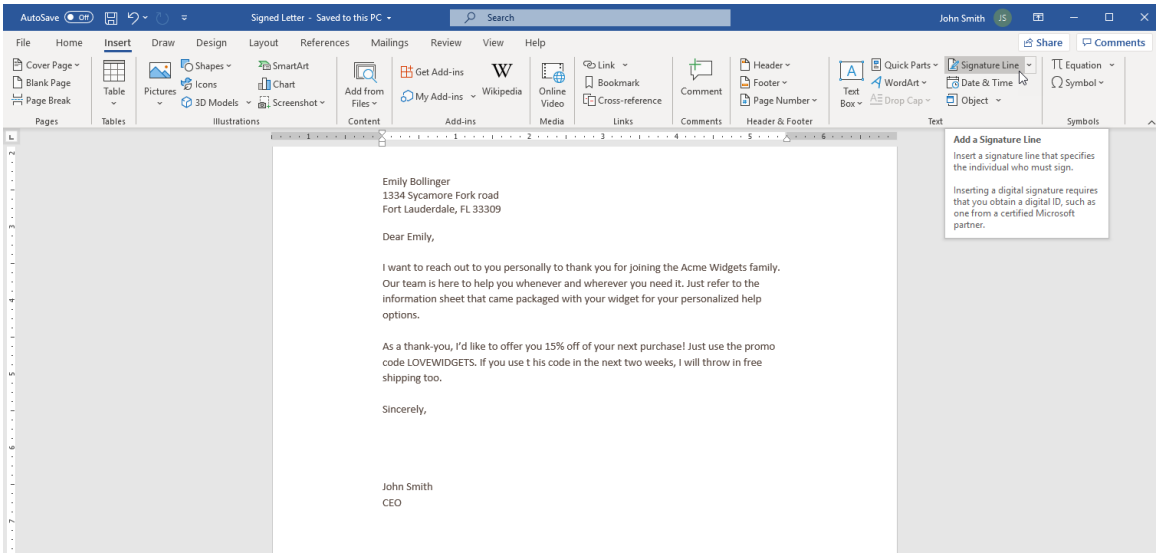
Digital Signatures

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.

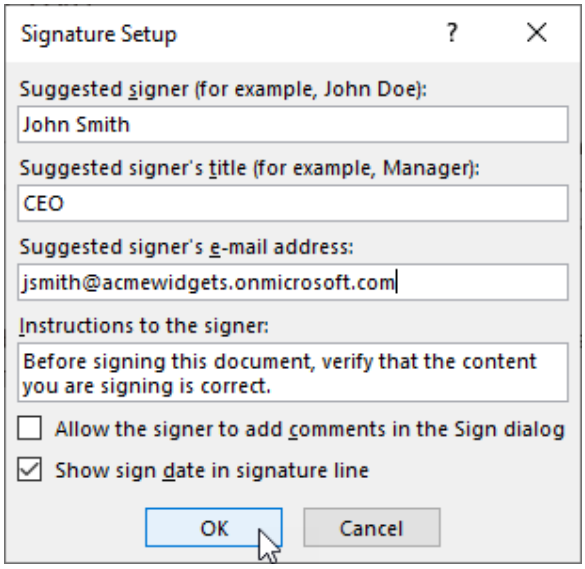
The Signature Line

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 → Signature Line**:



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:

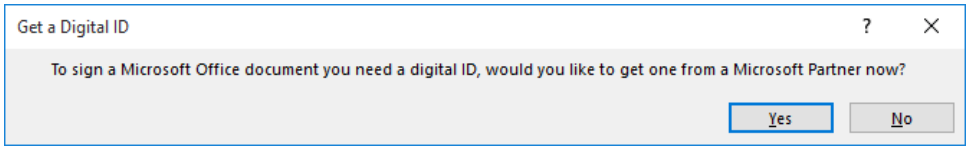


The signature line will then be inserted:

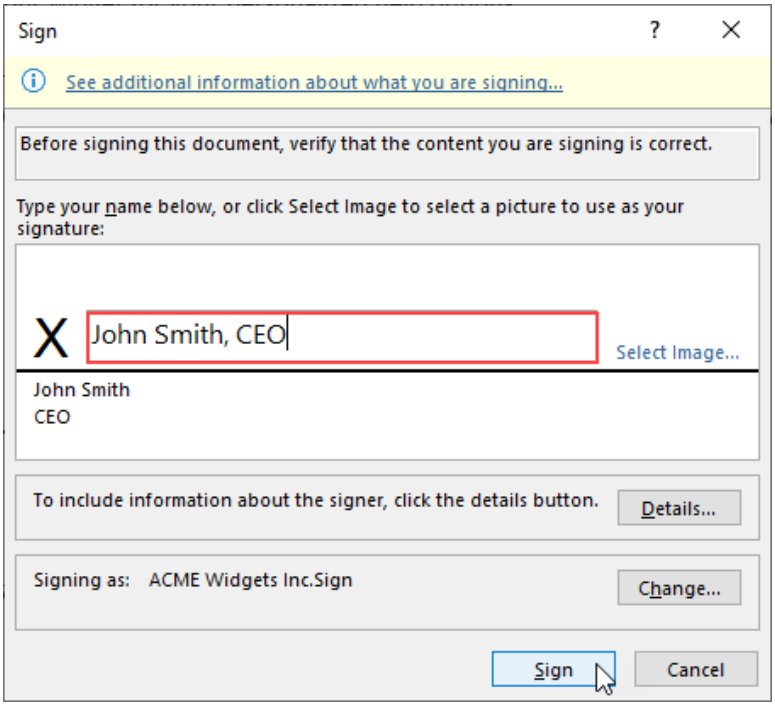
Digitally Signing a Document

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 → Info → Protect Document → Add a Digital Signature** to manually launch the process.)

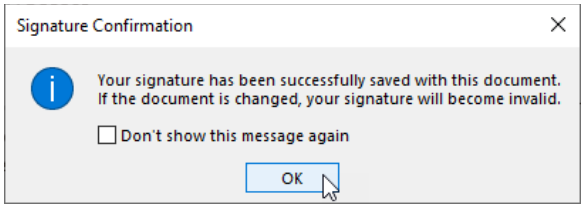
If they do not have a digital ID, they will be prompted to get one. They must click **Yes** to proceed:



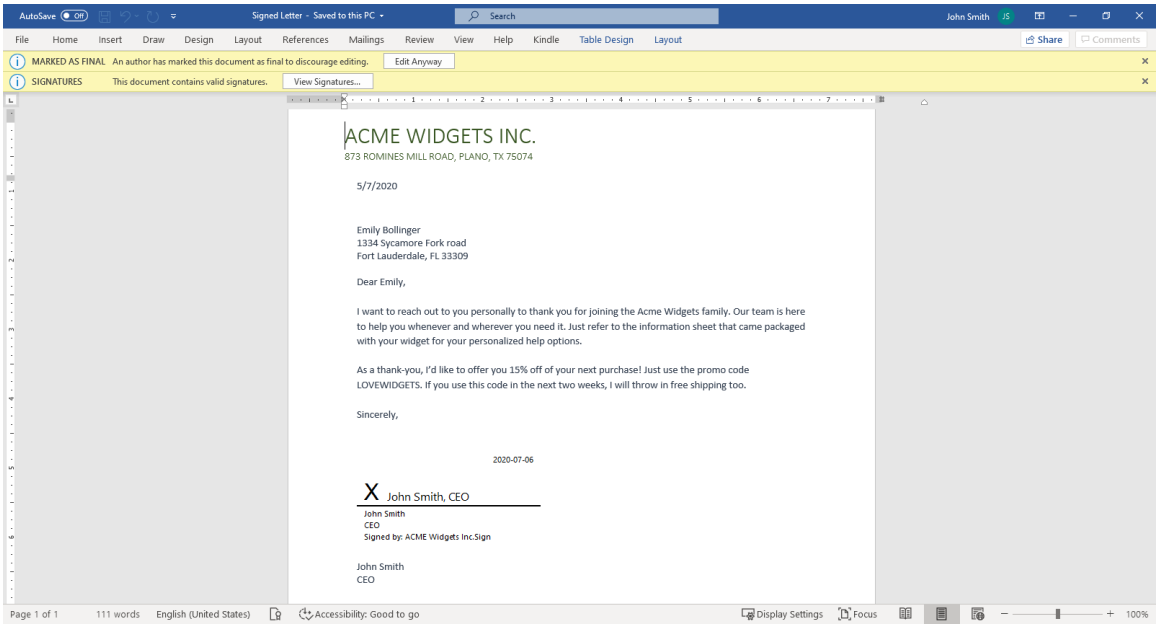
Once the user has a digital ID, the Sign dialog box will be displayed when the signature line is double-clicked. Here, the user can type their name and click **Sign** to complete the process:



Then, the user will see more details about what the signing process does to the document:

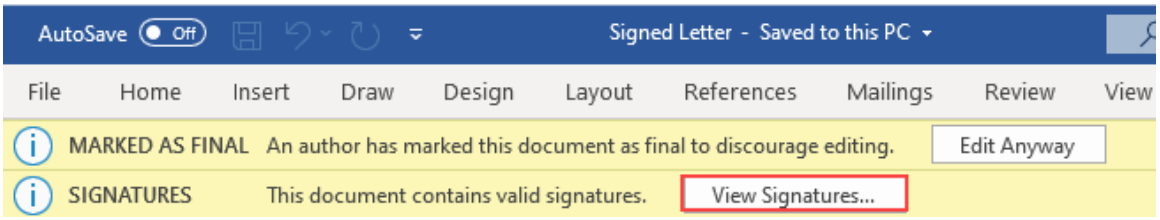


Clicking **OK** will return the user to the document, which has now been marked as final. They will also see a notification that the document contains digital signatures:

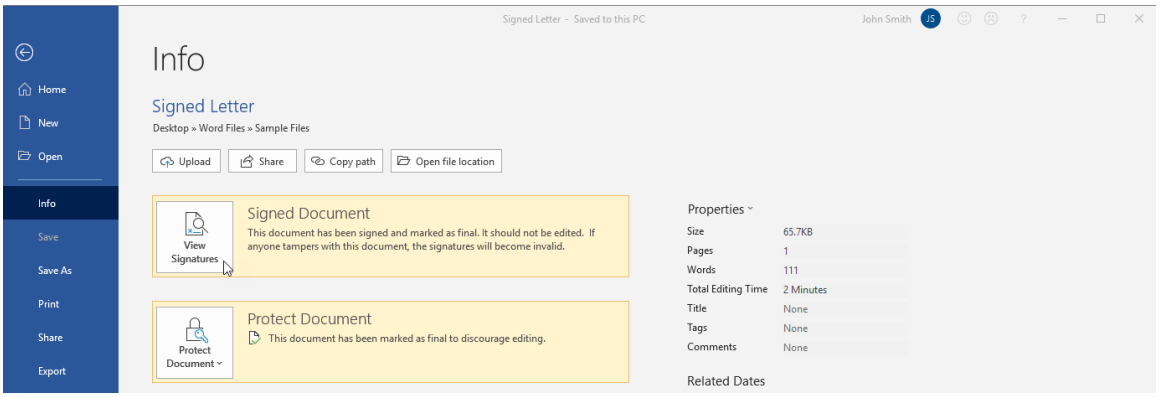


The Signatures Task Pane

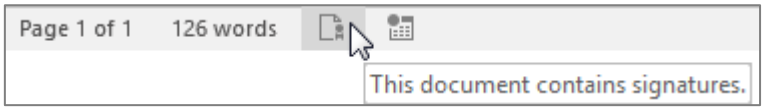
You can view and manage signatures with the Signatures task pane. The easiest way to open this task pane is to click the **View Signatures** command in the Message Bar, which will be displayed whenever requested or valid signatures are detected in a document:



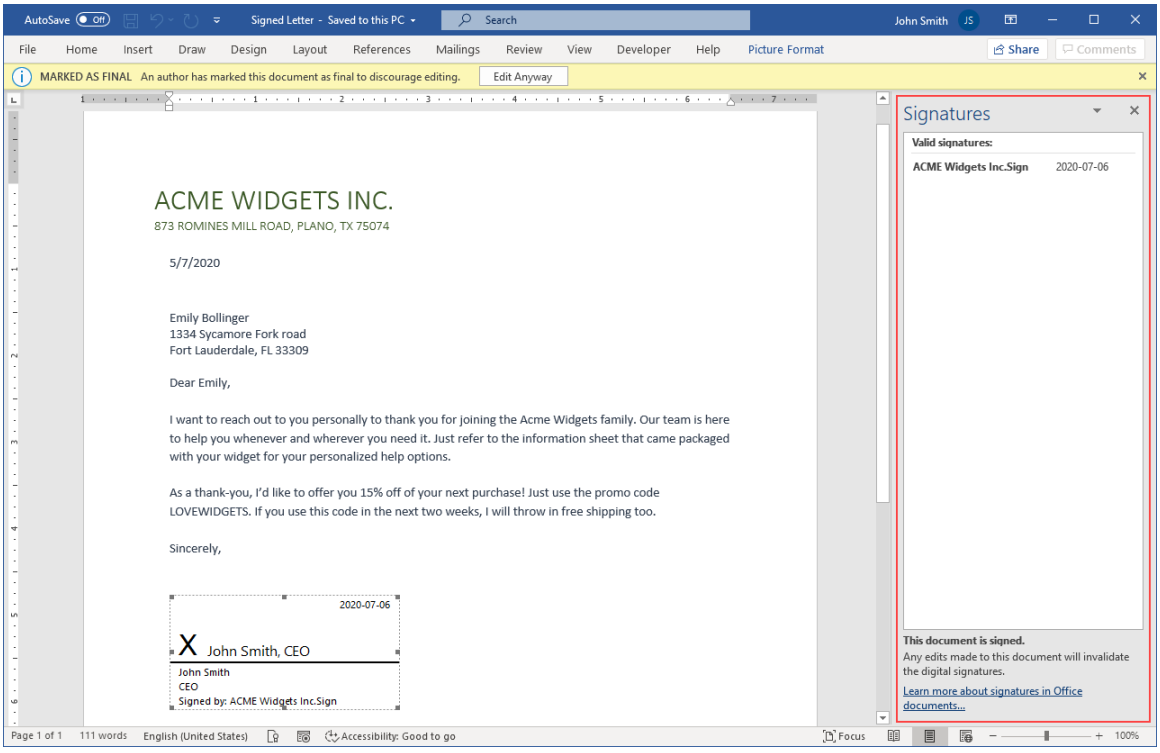
You can also click **File → Info → View Signatures**:



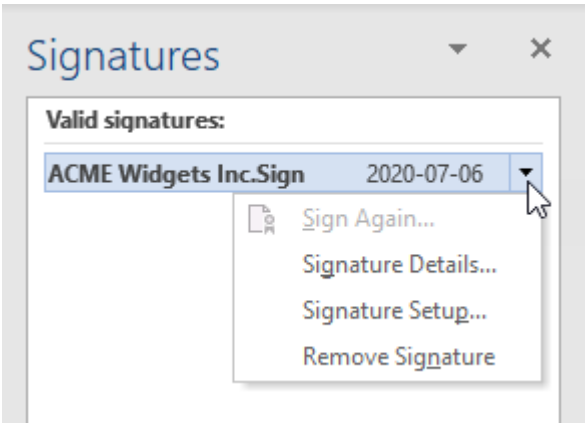
You can also click the signatures icon in the status bar:



With any of these commands, the Signatures task pane will appear on the right-hand side of the Microsoft 365 Word window:



You can right-click a signature to view its details, open the Signature Setup dialog box, or remove it from the document:



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

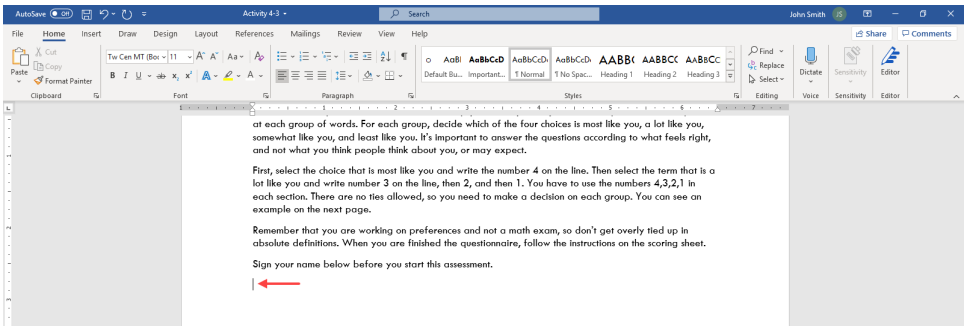
Once the document is digitally signed, a **valid signature** is applied. as previously discussed, its details can be viewed in the Signatures pane.

Activity 4-3: Adding Digital Signatures to a Document

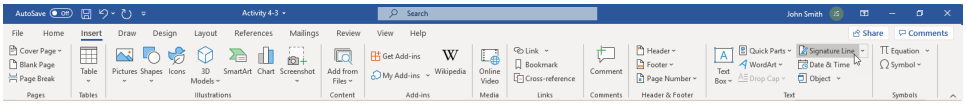
In this activity, you will add a signature line to a document.

1. Open Microsoft 365 Word and open Activity 4-3:

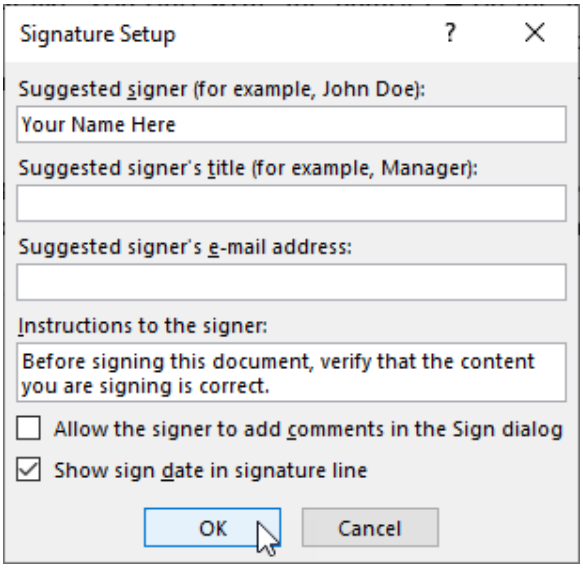
2. Let us add a signature line to the second page. Click to place your cursor after the last sentence on this page:



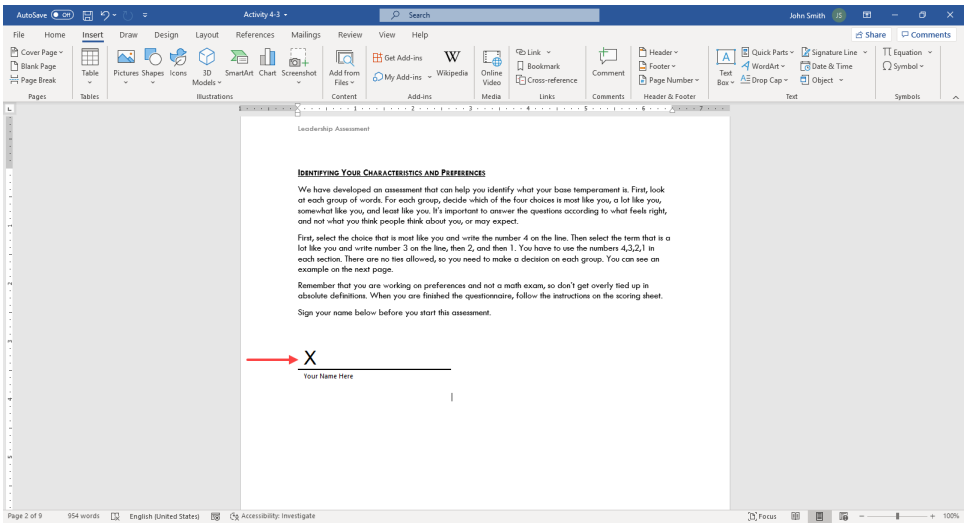
3. Click **Insert → Signature Line**:



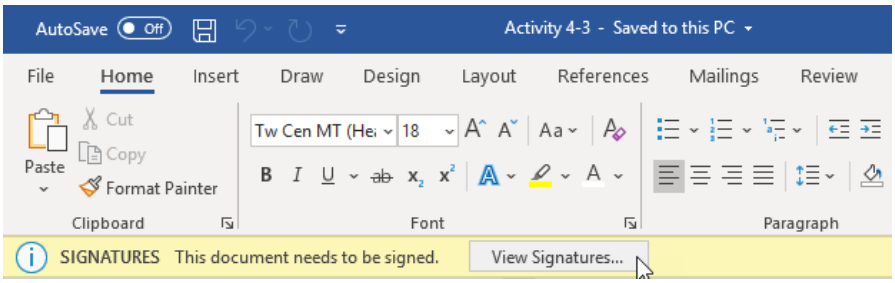
4. In the Signature Setup dialog box, enter “Your Name Here” as the suggested signer. Click **OK**:



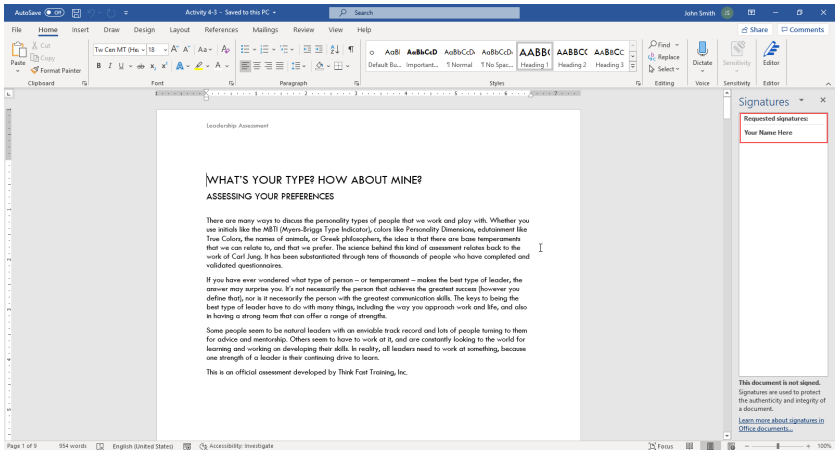
5. The signature line will be added:



6. Save, close, and re-open the document. You should see the **View Signatures** command in the Message Bar. Click it:



7. You will see the signature that we just created as a requested signature:



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.

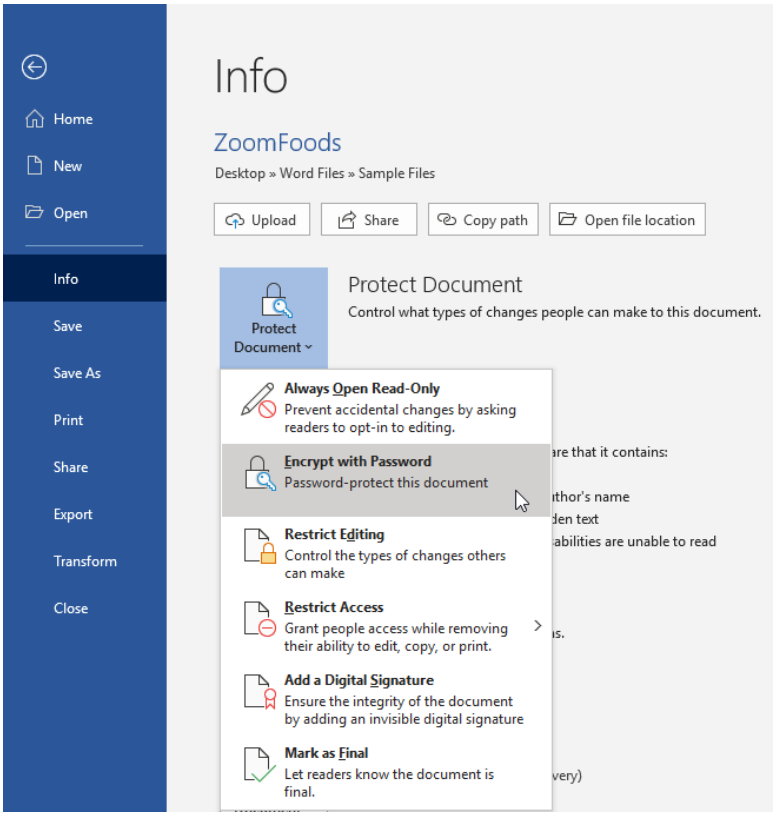
Topic Objectives

In this session, you will learn:

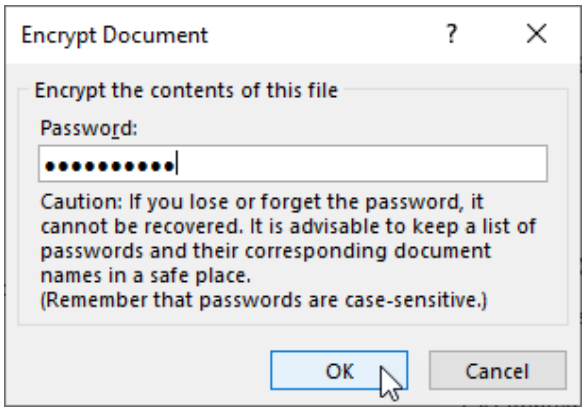
- How to apply a password to a document
- How to change or remove a document password

Applying a Document Password

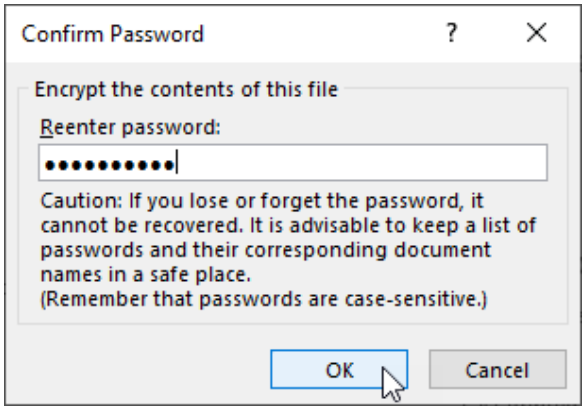
For additional security, you can add passwords to your documents. To start, open the document and click **File → Info → Protect Document → Encrypt with Password**:



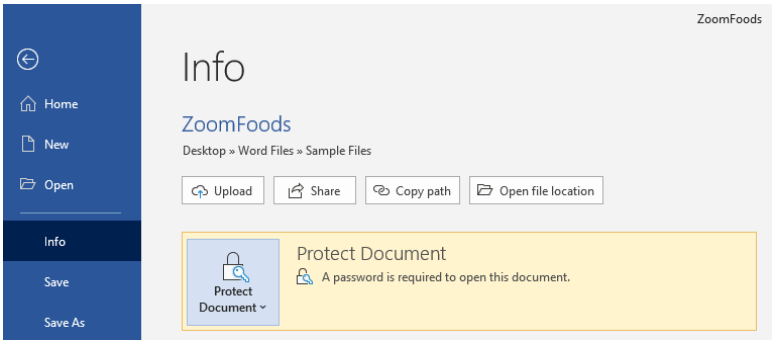
Now, enter the password in the provided text field and click **OK**:



Then, retype the password to confirm it and click **OK**:

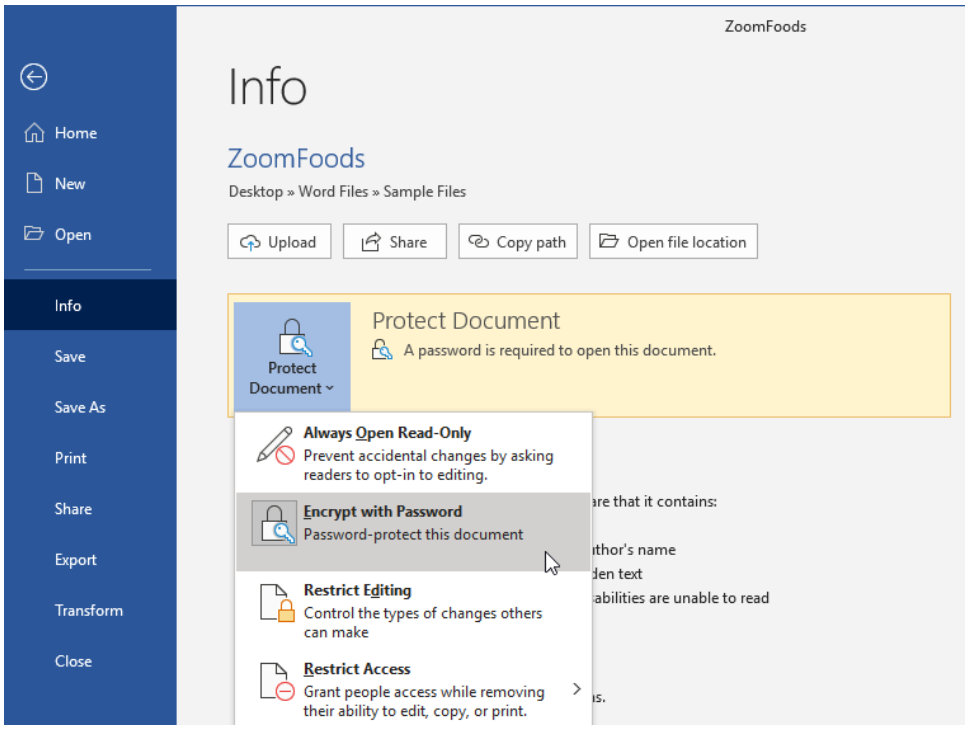


The Info category of Backstage view will now indicate that the file has a password applied to it:

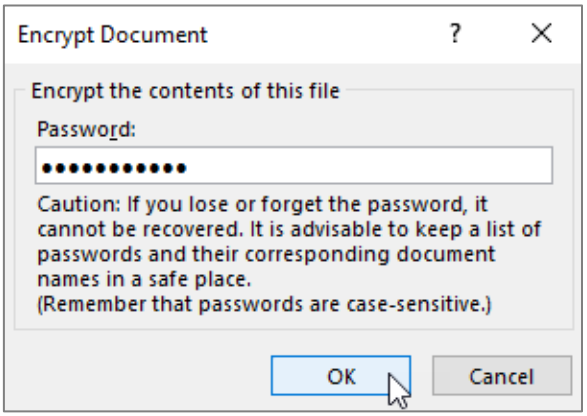


Changing the Document Password

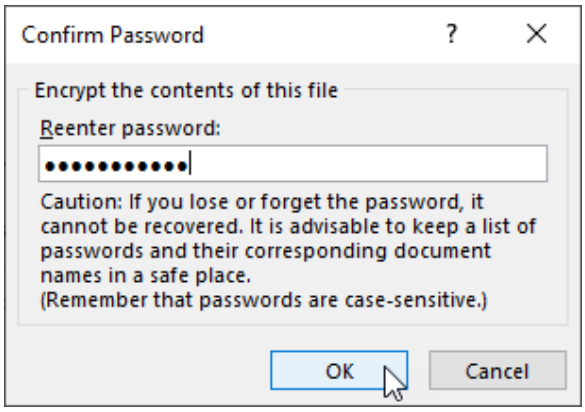
To change the password, click **File → Info → Protect Document → Encrypt with Password**:



In the Encrypt Document dialog box, enter the new password and click **OK**:



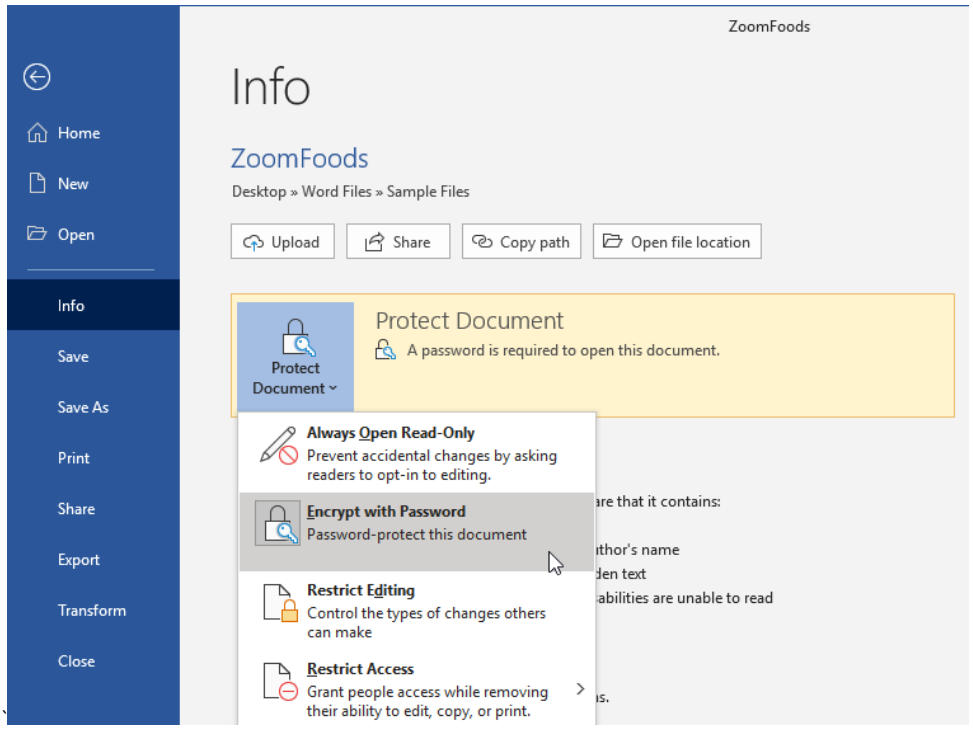
Re-enter the new password to confirm it and click **OK**:



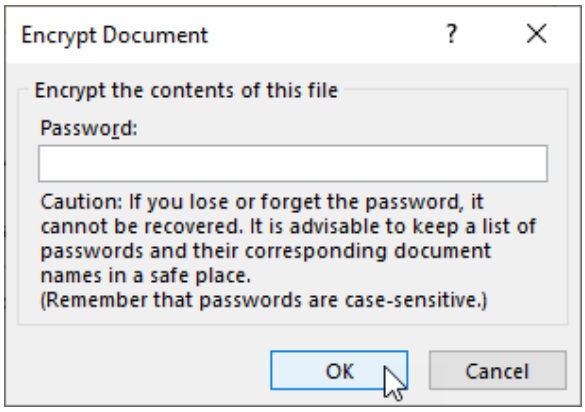
The document password will now be changed.

Removing the Document Password

To remove the password, click **File → Info → Protect Document → Encrypt with Password**:



In the Encrypt Document dialog box, remove the password from the text field and click **OK**:



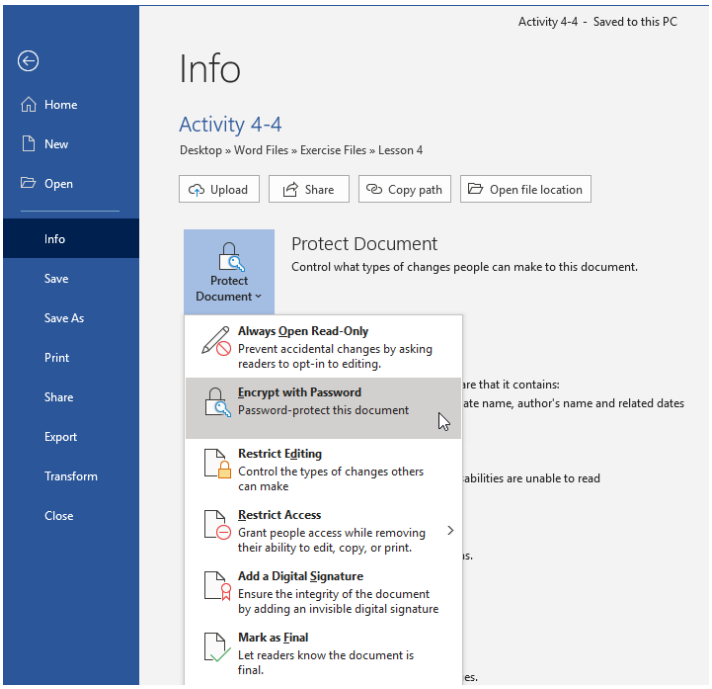
Now, the document will no longer be password protected.

Activity 4-4: Restricting Document Access

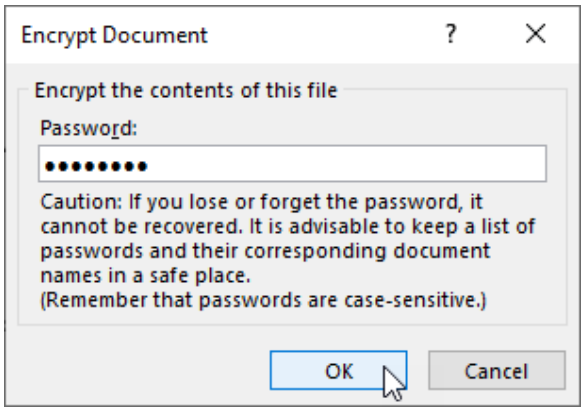
In this activity, you will apply a password to a document.

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

2. Let us add a password to this document. Click **File → Info → Protect Document → Encrypt with Password**:

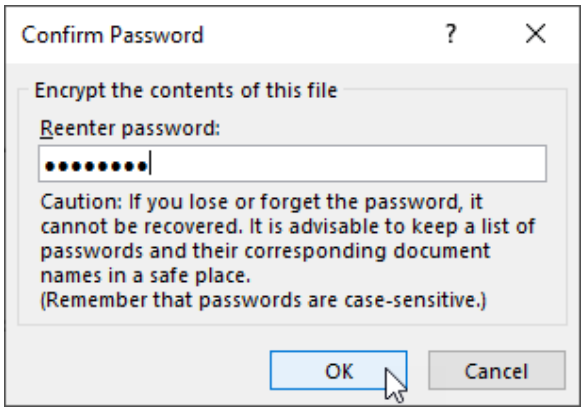


3. The Encrypt Document dialog box will open. Type the word "**password**" in the text field and click **OK**:

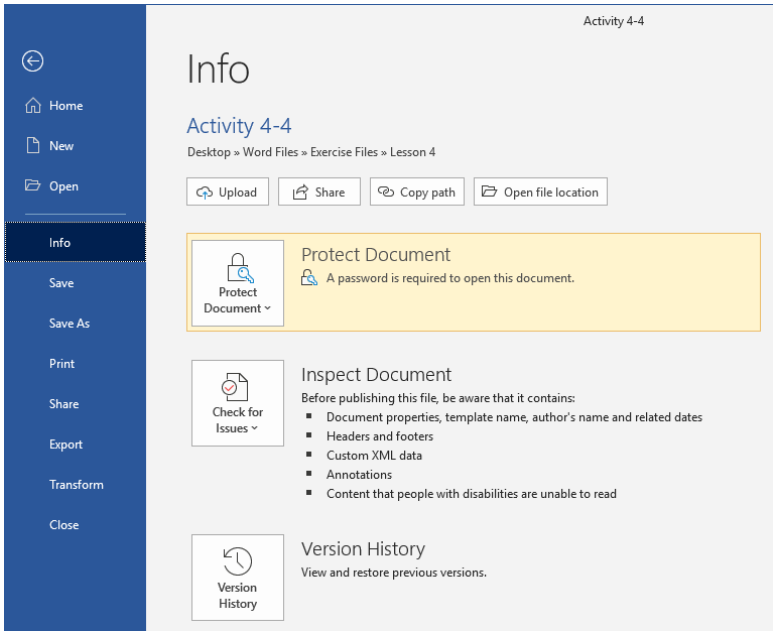


In a real-world scenario, you would choose a strong password that is a mix of uppercase and lowercase letters, numbers, and special characters.

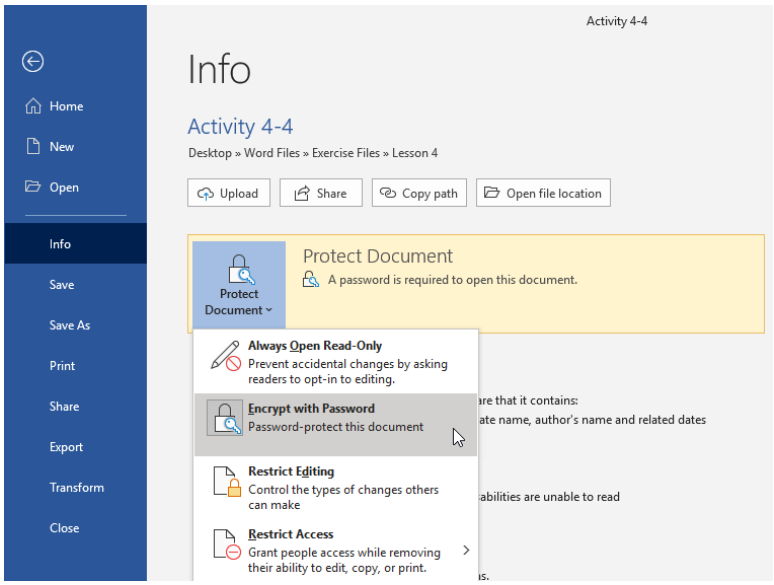
4. The Confirm Password dialog box will open. Type the word "**password**" again to confirm it and click **OK**:



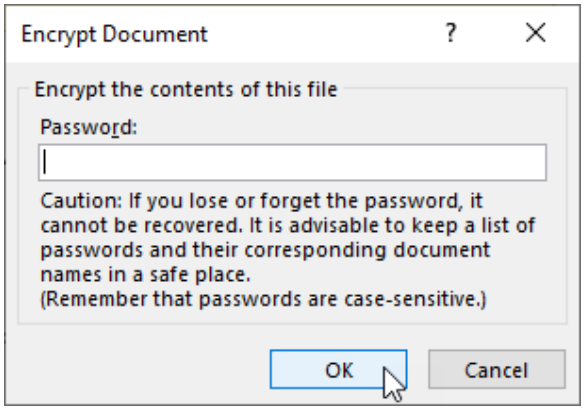
5. Back in the Info category of Backstage view, you can see that the password has been applied:



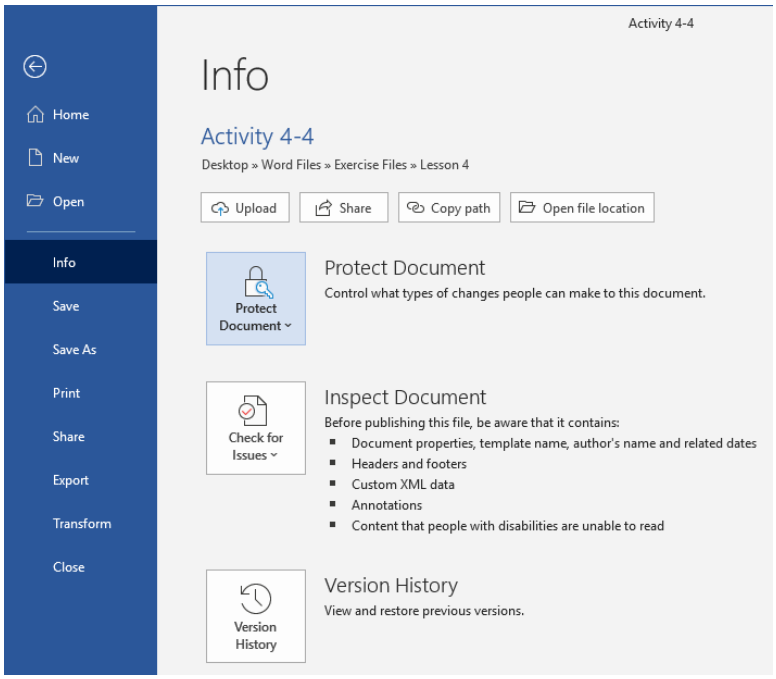
6. On second thought, we do not really need a password for this document. In the Info category of Backstage view, click **Protect Document → Encrypt with Password**:



7. In the Encrypt Document dialog box, **remove the password** from the text field and click **OK**:



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

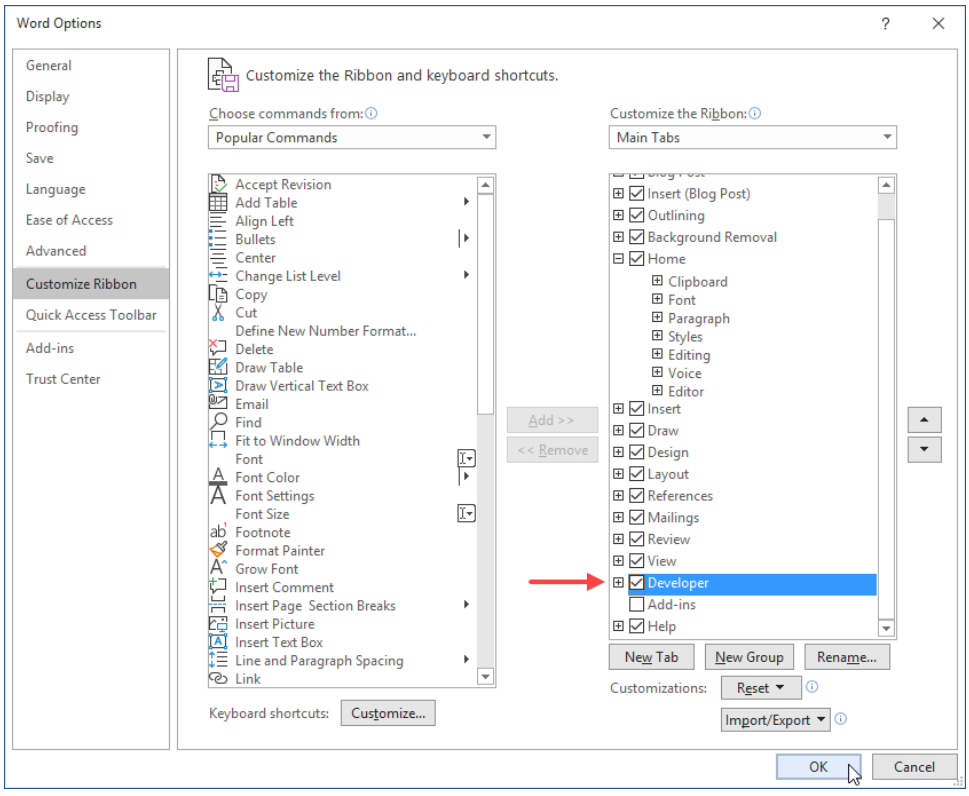
Forms

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.

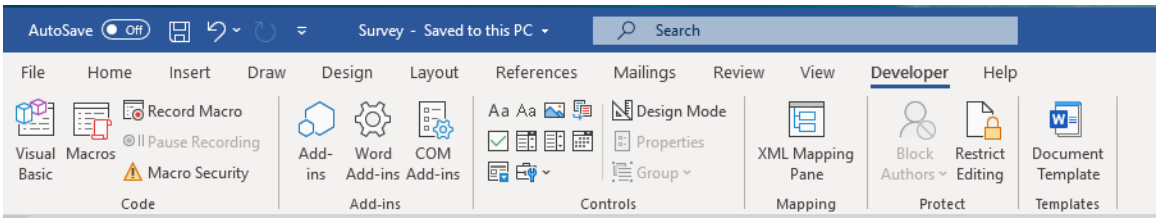
Many of the commands to work with forms are located on the Developer tab, which is not enabled by default.

To enable this tab, click **File → 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:



The Developer tab will now be accessible:



Plan a Form

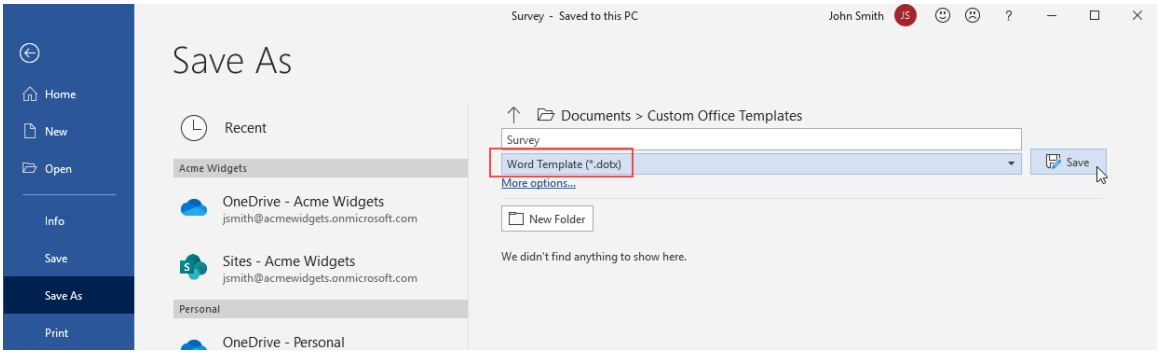
Let us start by creating a basic form. We highly recommend that you create a table and lay out the basics of your form, just as if you were creating a form that would be filled in by hand. (Remember that table commands can be found on the Insert tab.)

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.

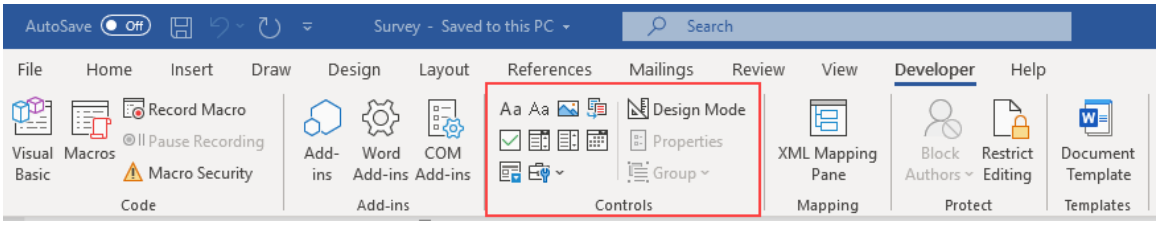
The form should then be saved as a template. Remember, you can do this using the Save As dialog box:



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:



Let us take a quick look at each command:

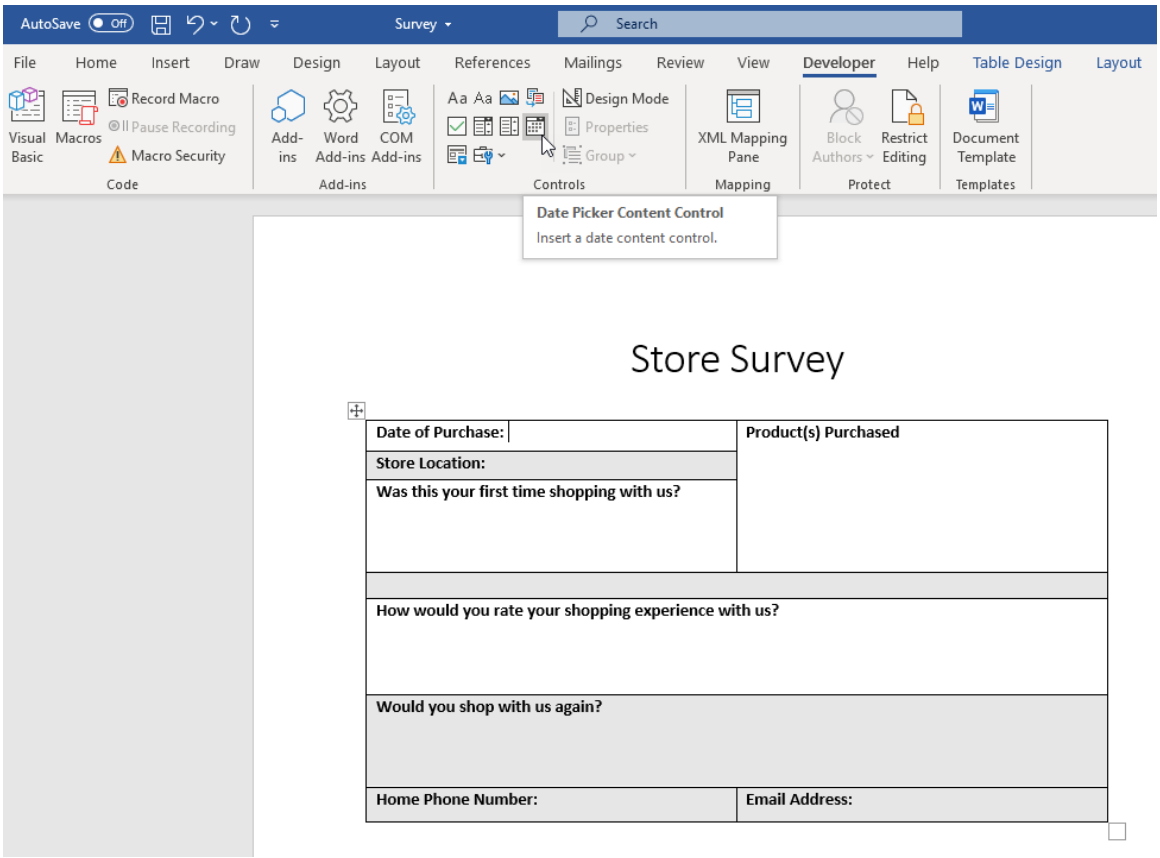
Icon	Description
Aa	Inserts a rich text box control.
Aa	Inserts a plain text box control.
	Inserts a picture control.
	Inserts a Building Block control.
	Inserts a checkbox, where users can specify one or more conditions.
	Inserts a combo box, where users can pick from multiple items.
	Inserts a drop-down 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.
	This menu contains form controls offered in previous versions of Word and ActiveX controls, referred to as **legacy tools.**

Content Controls

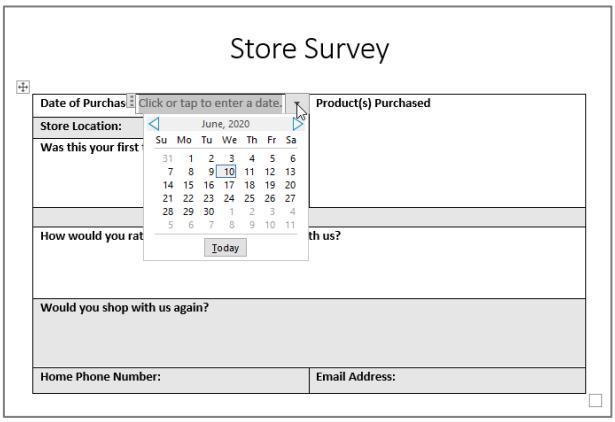
Some of the more advanced controls available in Microsoft 365 Word are called **content controls**. These allow users to interact with document properties or objects (such as date pickers) to make form entry easier and less prone to error.

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:



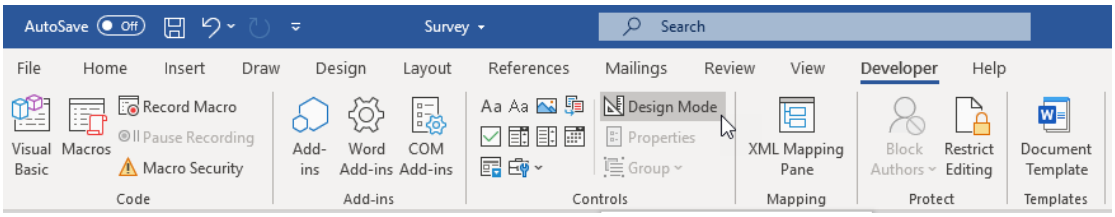
Once the command is executed, the control appears in the form and is ready to be used:



To remove a control, select it with your cursor and press the Delete key on your keyboard.

Design Mode

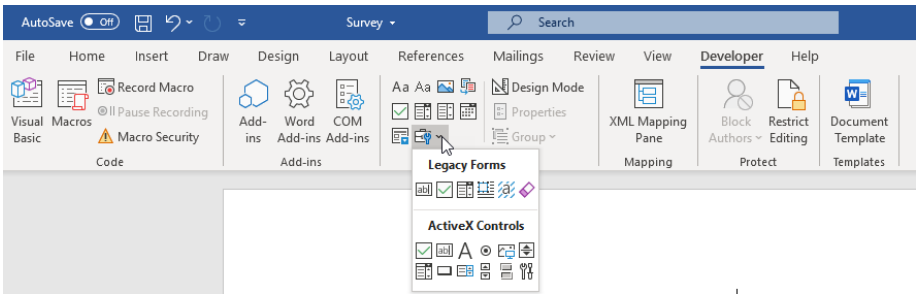
To edit the properties of some controls, you will need to enter Design Mode. To do this, click **Developer → Design Mode**:



When you are finished, click **Developer → Design Mode** again to return to editing mode.

Legacy Tools

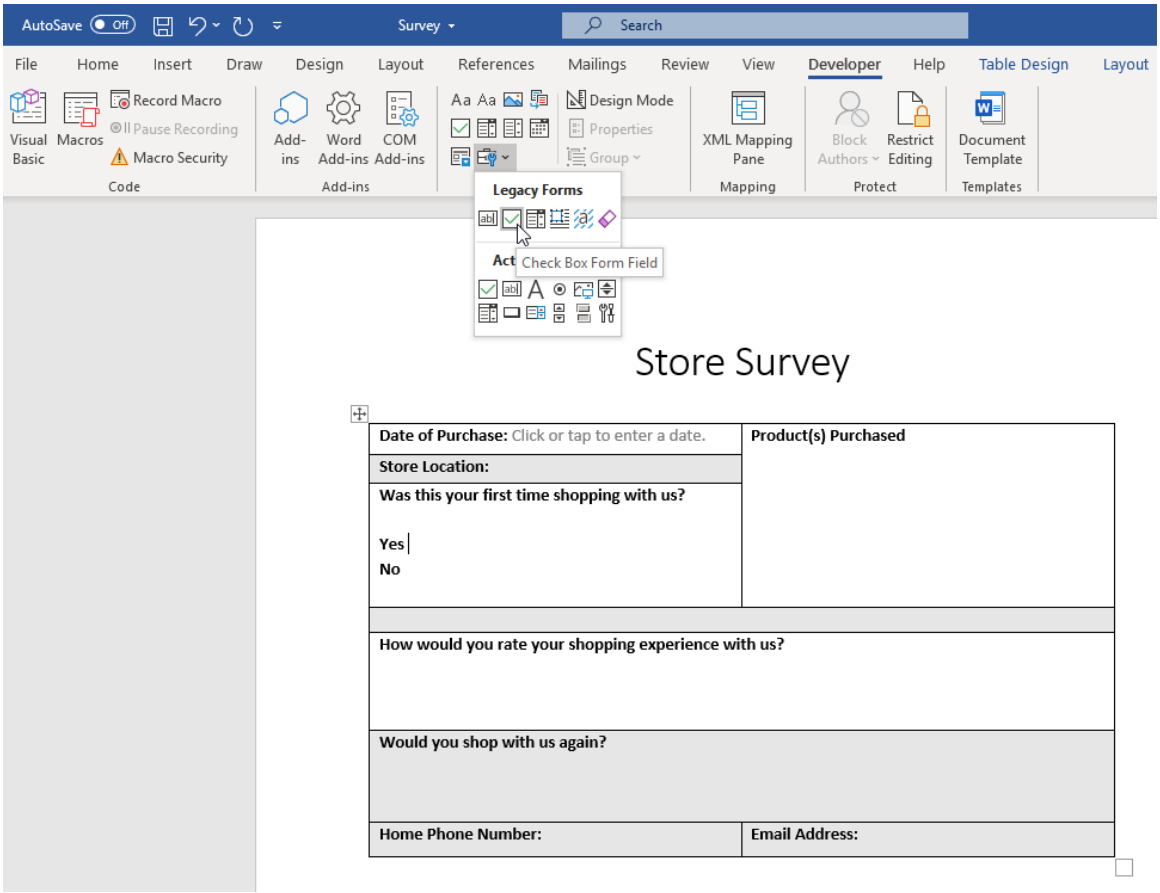
Legacy controls, which are compatible with Word 2003 and earlier, can be found by clicking **Developer → Legacy Tools**:



Let us take a look at the six legacy controls:

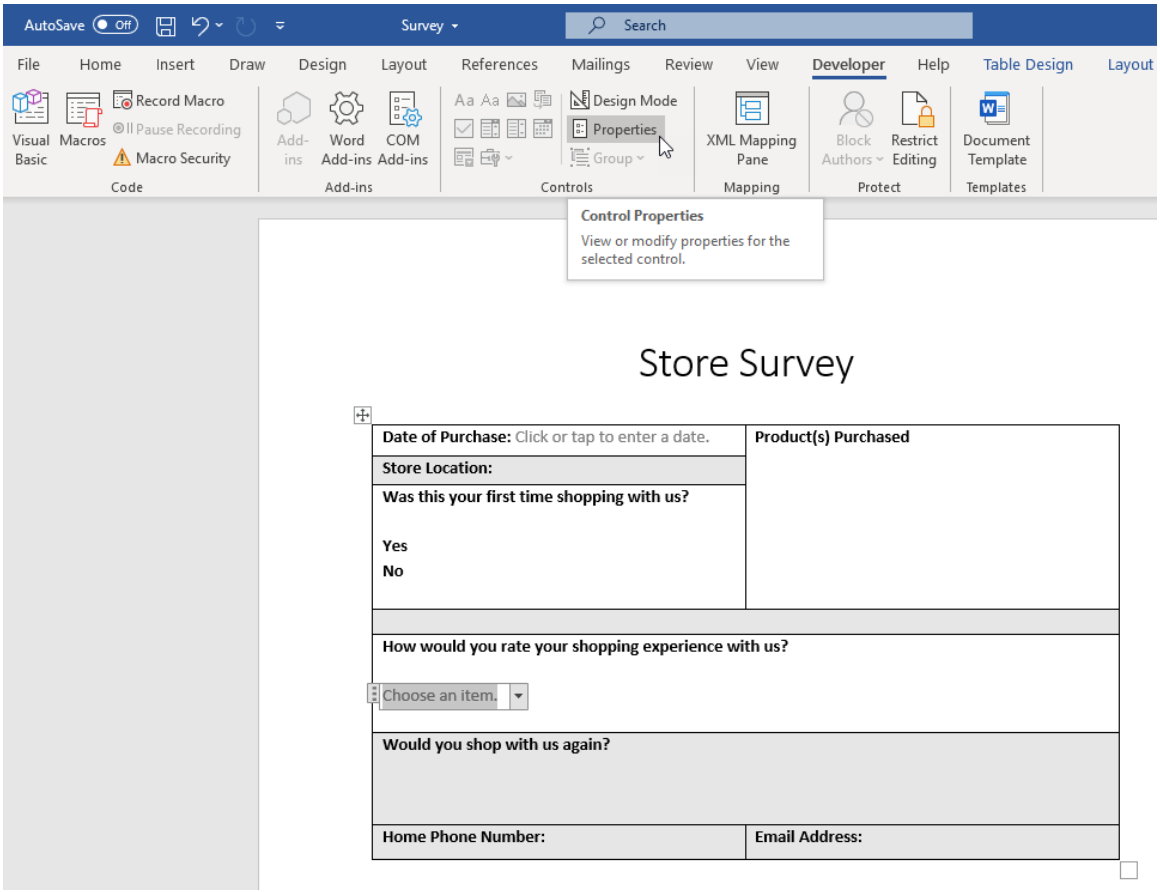
Icon	Description
	Inserts text field.
	Inserts a checkbox.
	Inserts a list box.
	Inserts a frame.
	Shades form fields.
	Reset form fields to empty; useful when testing.

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:

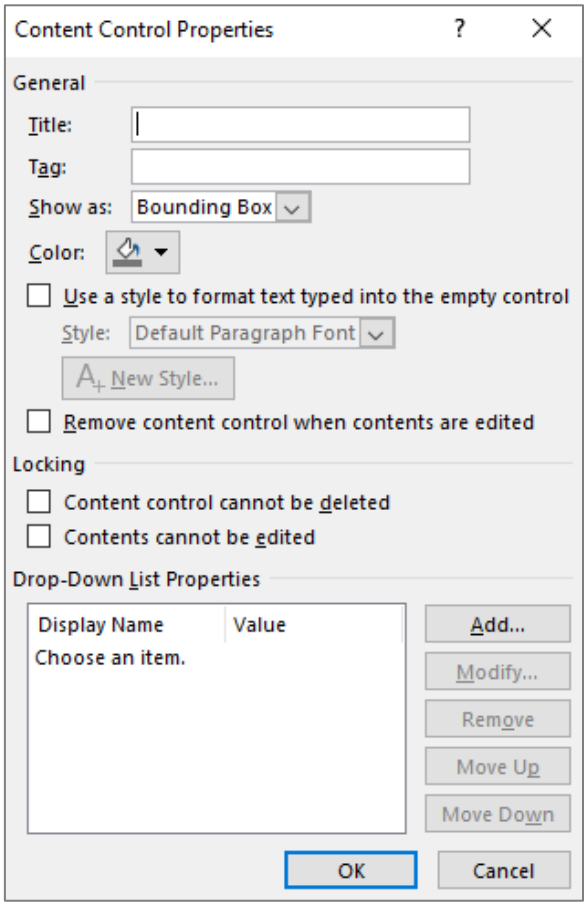


Form Field Options

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 → Properties**. For example, here we have inserted a drop-down list and we are about to modify its properties:

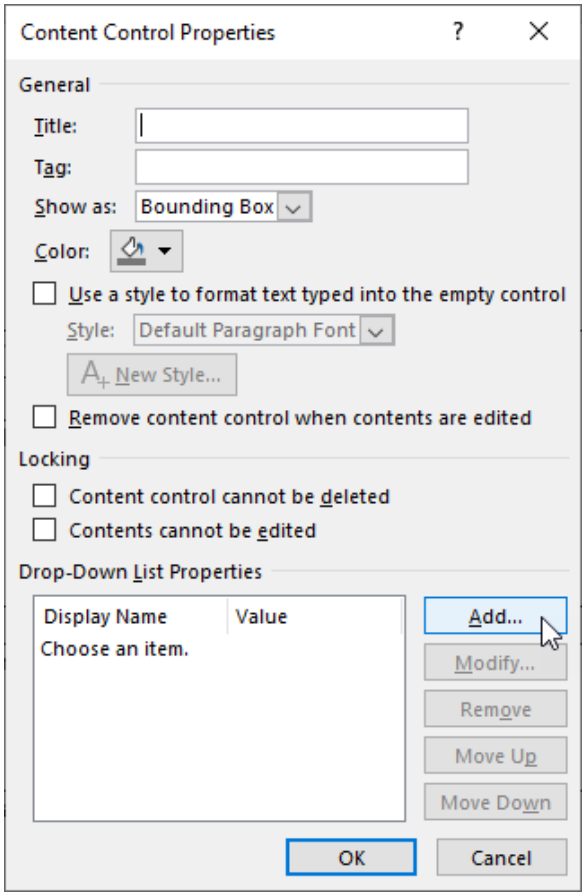


The appropriate Properties dialog box will open. Here, you can modify various aspects of the control:

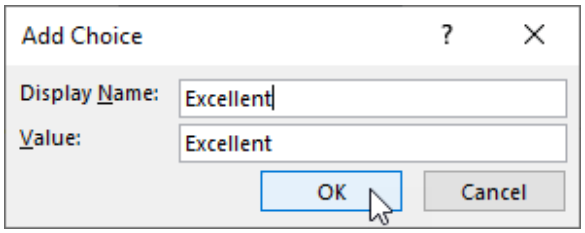


(Note that this dialog box may look different, depending on what type of control you have selected.)

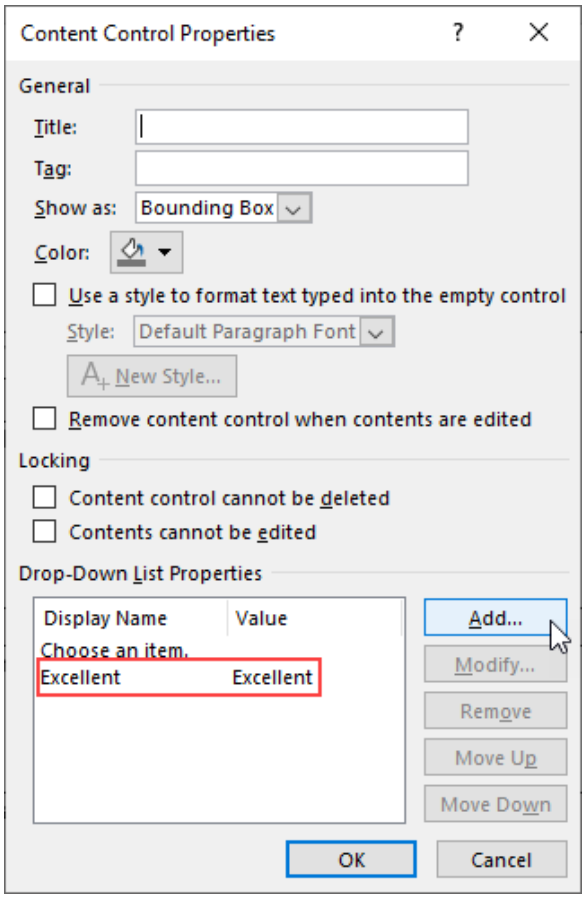
For this example, we can add the desired values for the drop-down menu by clicking the **Add** button:



Now, we can type the name of the drop-down entry. (The Value field will automatically be populated as you do this.) Click **OK**:



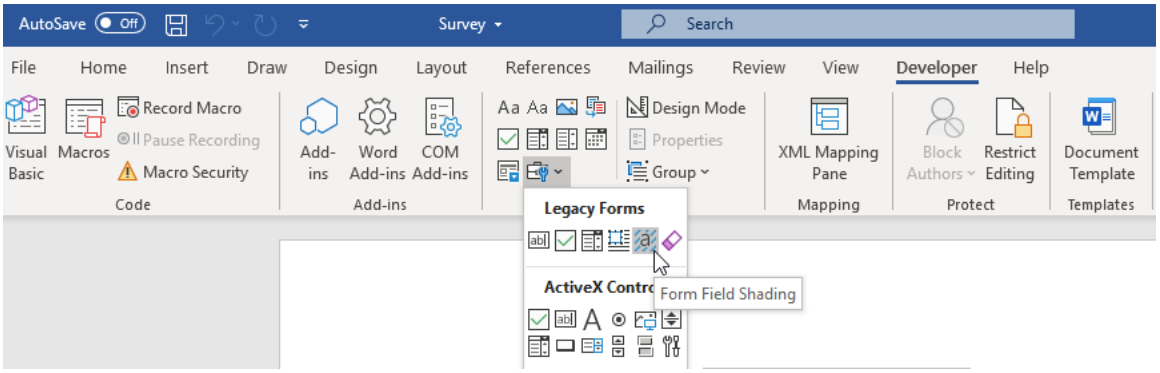
The entry will now appear in the Content Control Properties dialog box:



Repeat the above process to continue adding more entries. Click **OK** to save your changes when you are finished.

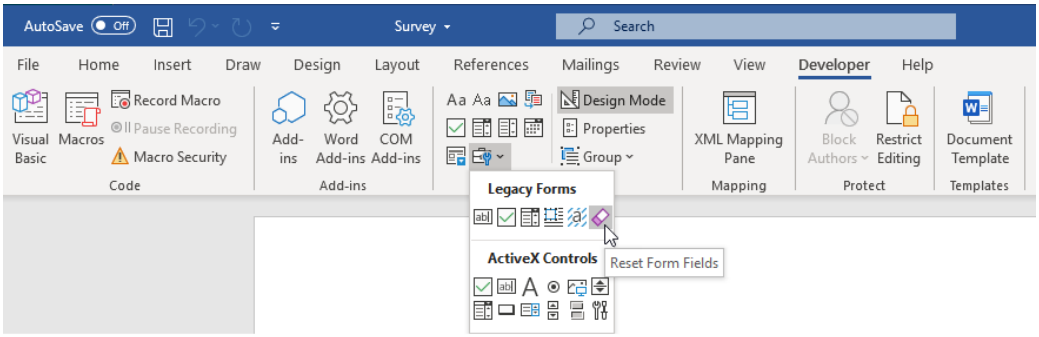
Toggling Form Field Shading

The **Legacy Forms** menu also contains a command to toggle shading on or off for all the fields in a particular form:



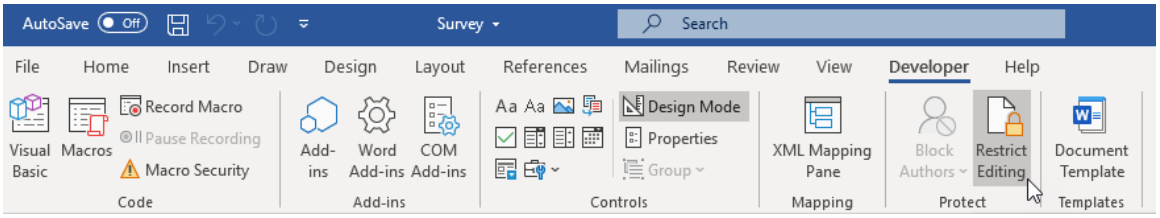
Clearing Entered Data from Form Fields

You can also use the **Legacy Forms** menu to reset all fields in a form to their default information:

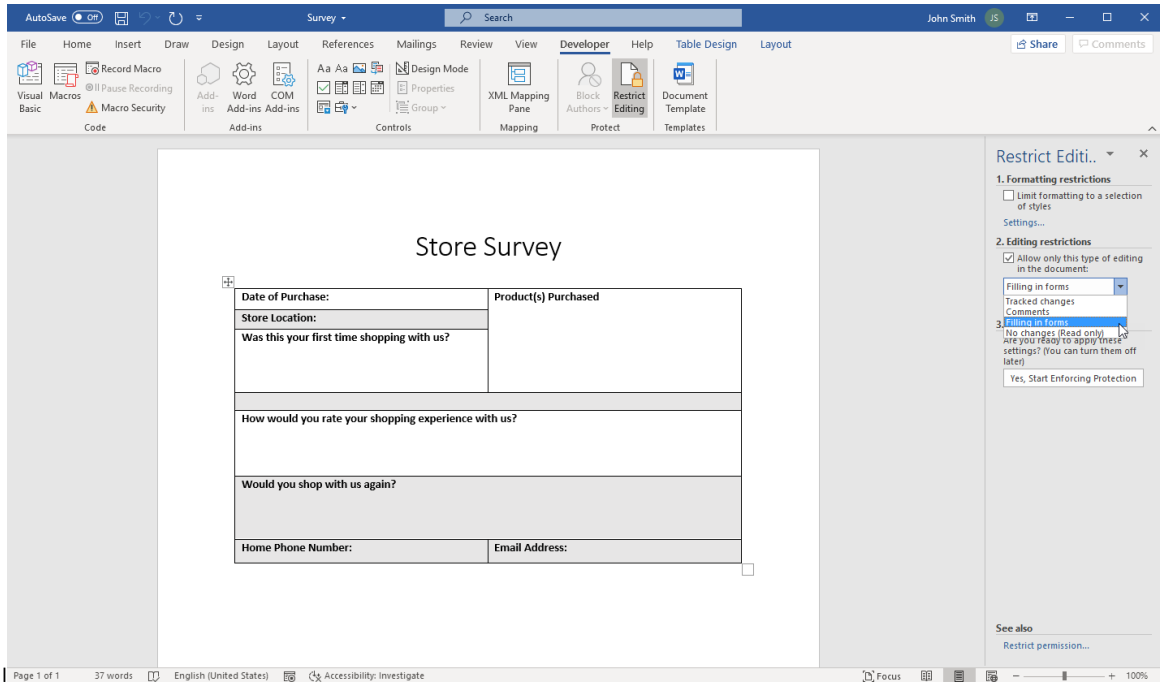


Protecting a Form

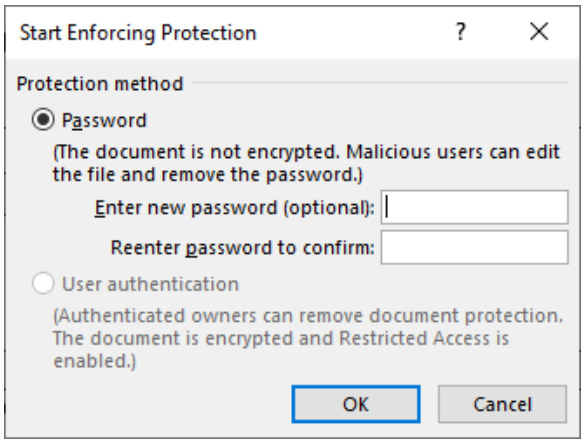
If you have completed your form, we recommend that you protect it so it cannot be edited by users (except, of course, for the portions that need to be filled in). To protect the form, click **Developer → Restrict Editing**:



You will then see the Restrict Editing task pane. Check the second box and choose "**Filling in forms**" from the drop-down menu:

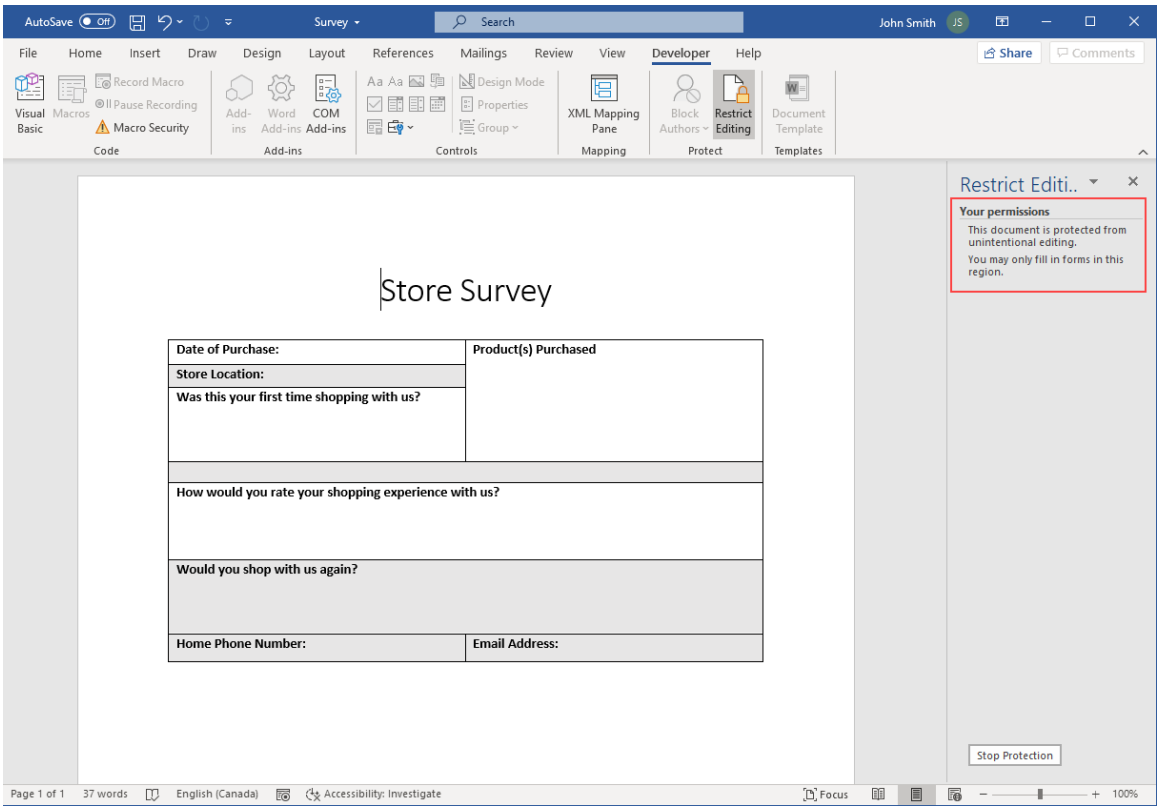


Then click **Yes, Start Enforcing Protection**. You will see this dialog box appear:



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:



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.

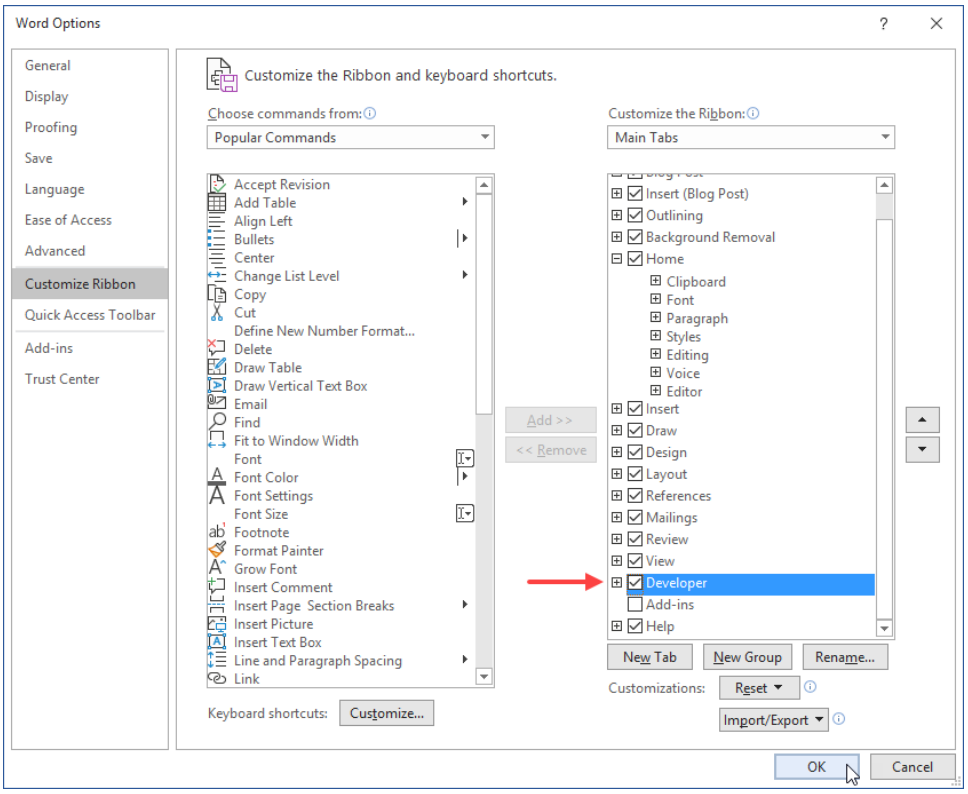
Activity 5-1: Creating a Form

In this activity, you will create and test a simple form.

1. To begin, open Microsoft 365 Word. Create a blank document.

2. If you already have the Developer tab enabled, skip to Step 4. Otherwise, click **File → Options**:

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**:

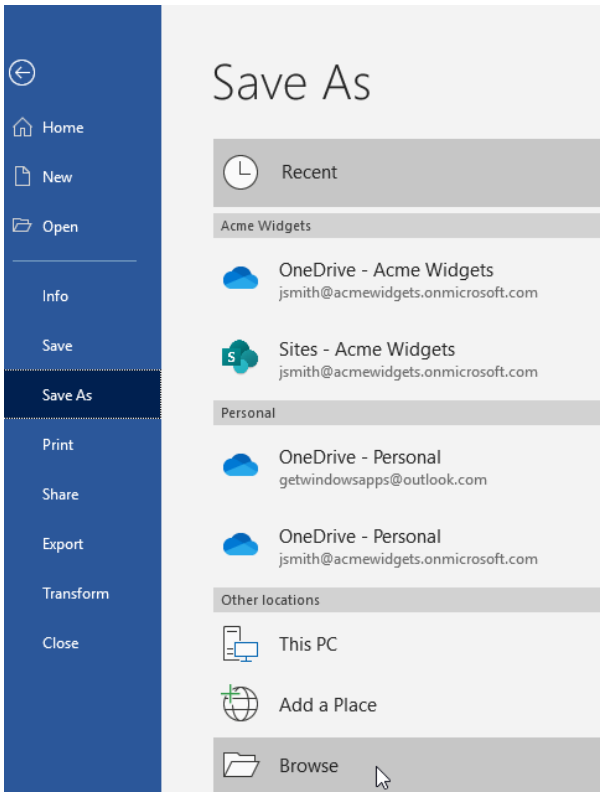


4. With the Developer tab now displayed, create a table that looks like the following. Use the Insert tab to create the table and the contextual tabs to design it. (You can start by creating a 2x7 table and then merging/splitting cells as necessary.) Do not forget the "Store Survey" title!

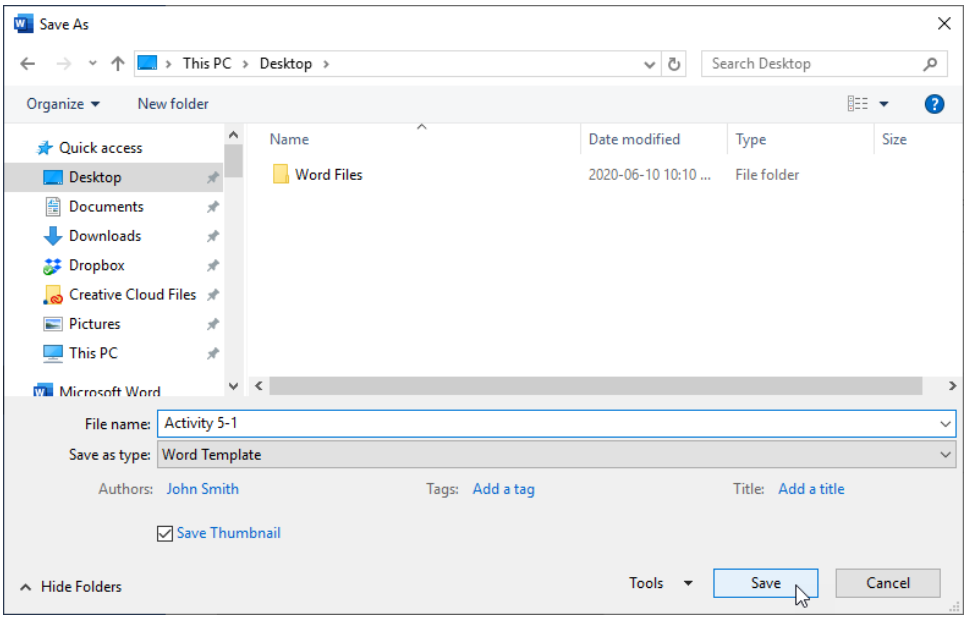
Store Survey

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:**

5. Click **File → Save As → Browse**:

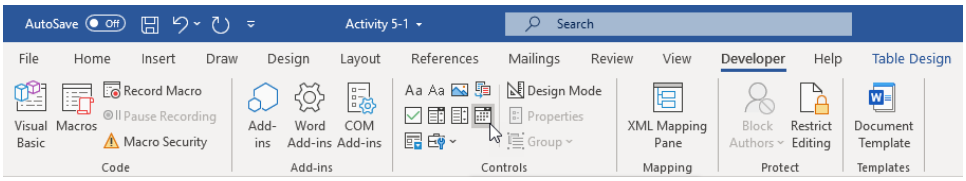


6. When the Save As dialog box appears, select **Word Template** from the "Save as type" drop-down menu. Name the document **Activity 5-1** and save it to your desktop. Click **Save**:

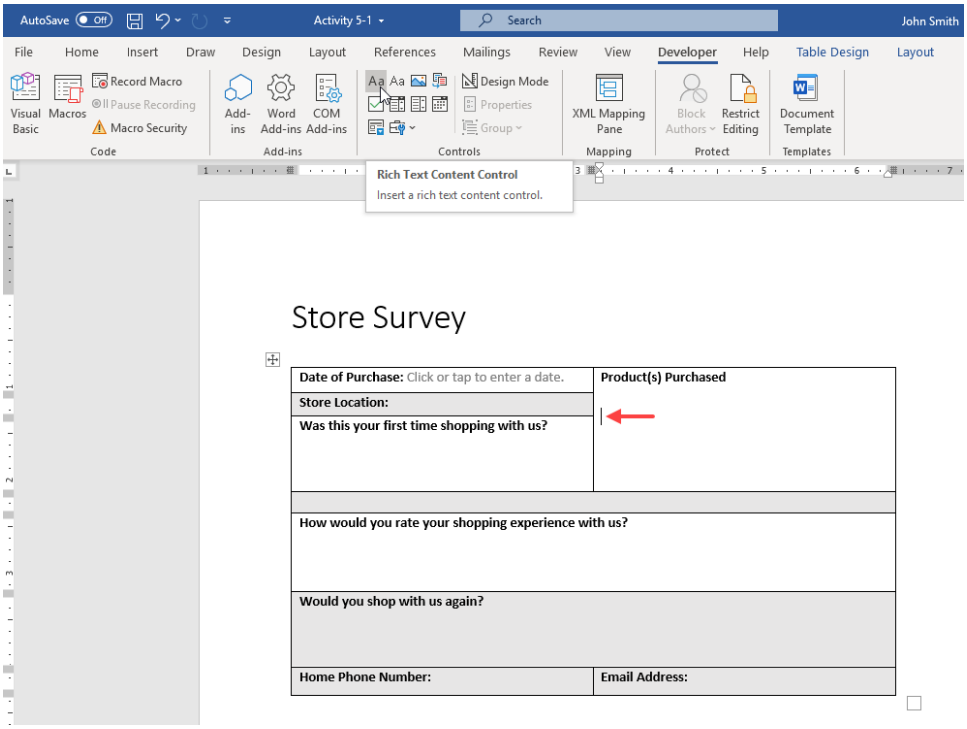


7. Returning to the document, click inside the Date of Purchase cell to place the cursor there. Add a space after the colon if necessary:

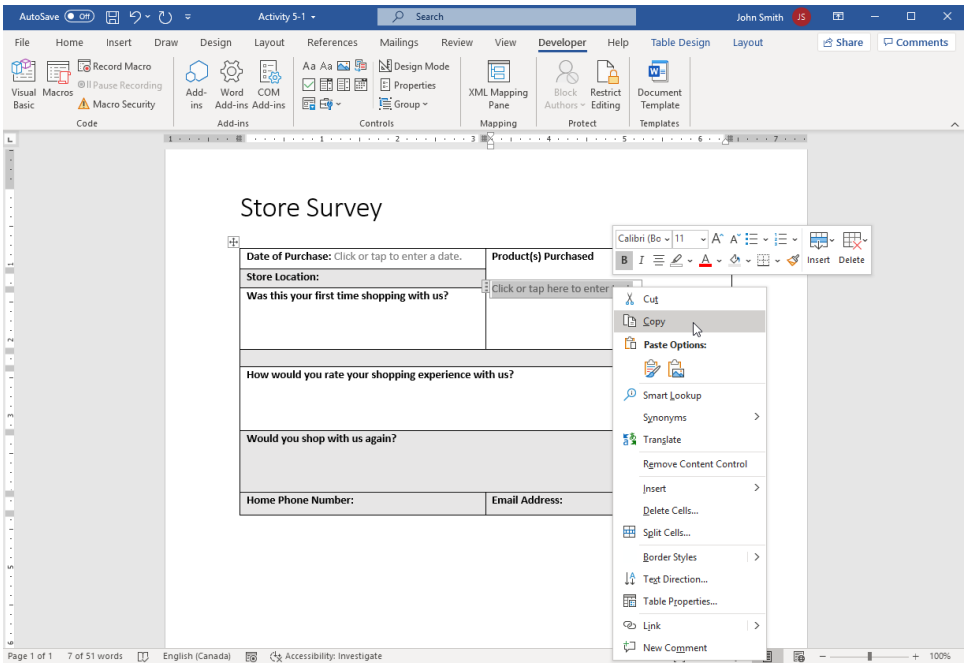
8. Click **Developer → Date Picker**:



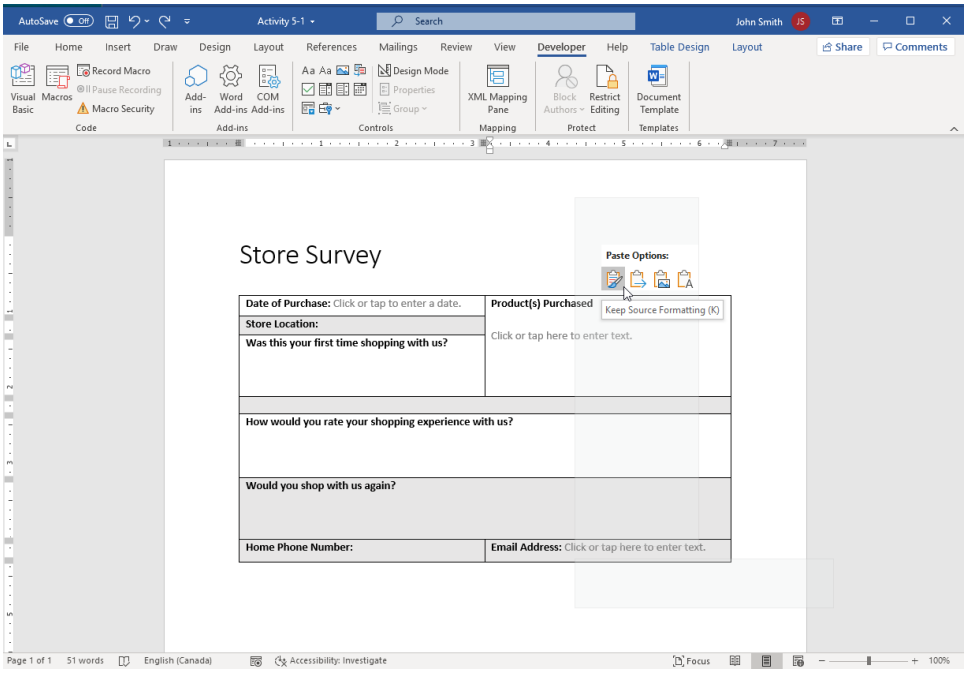
9. The control will be added. Click to **place your cursor** beside the words "Product(s) Purchased." **Press Enter twice**. Click the **Rich Text** control on the Developer tab:



10. This will insert the control. Next, **select it** and **copy it**:

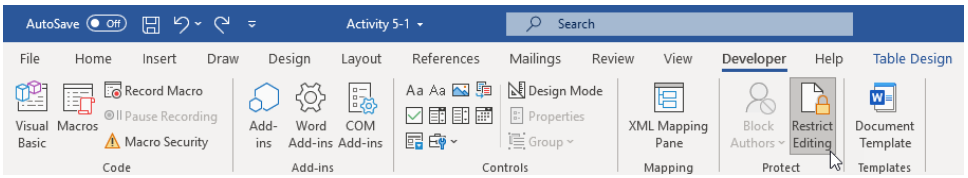


11. **Right-click inside the "E-mail address" field** and click **Paste → Keep Source Formatting** from the context menu:

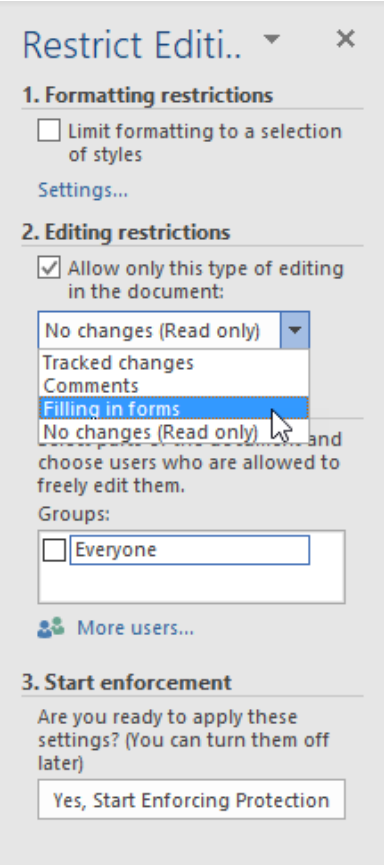


Note that the rest of the right-click menu fades away when you point to Keep Source Formatting. The control will be pasted once you click the command.

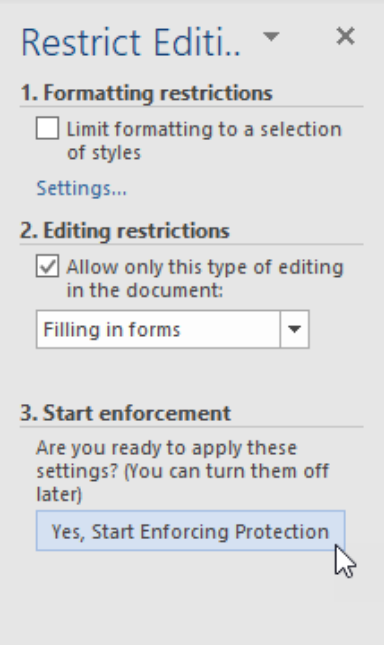
12. Click **Developer → Restrict Editing**:



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:

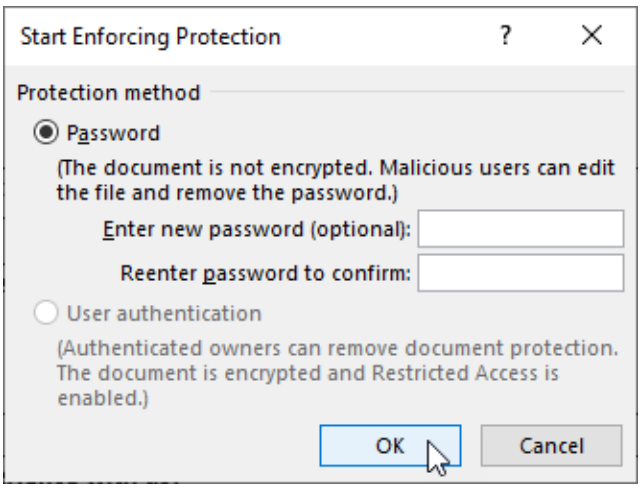


14. Now click "**Yes, Start Enforcing Protection**" at the bottom of the pane:



(If this command is not available, click Developer → Design Mode.)

15. The Start Enforcing Protection dialog box will open. Click **OK** to protect the form without a password:



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.

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.

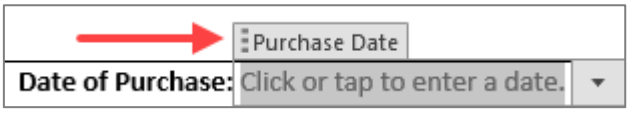
Topic Objectives

In this session, you will learn:

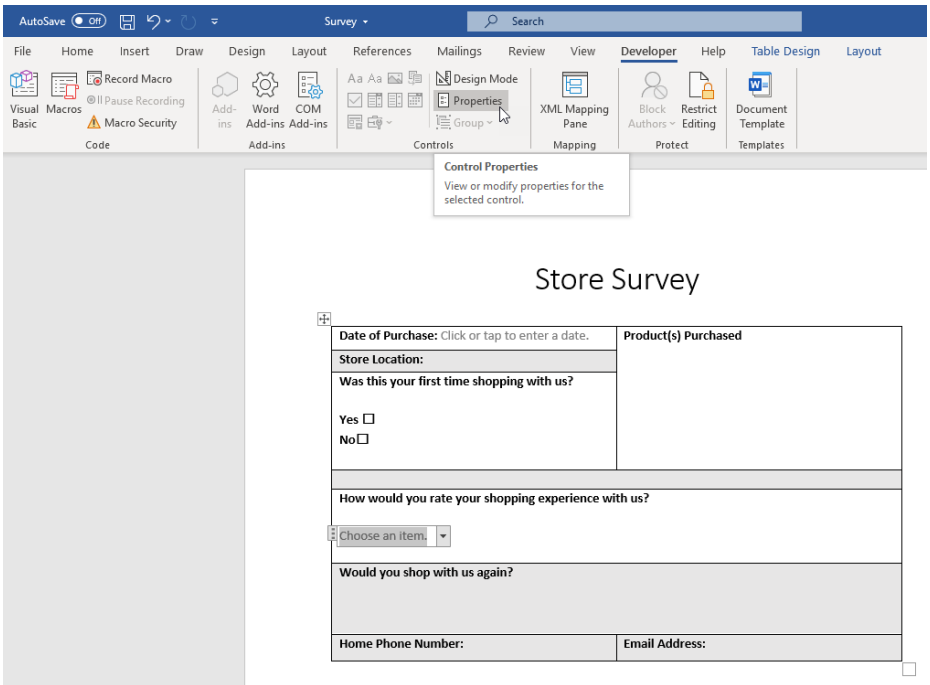
- How to modify the title tab for a control
- How to add help to a form field

Modifying a Control's Title Tab

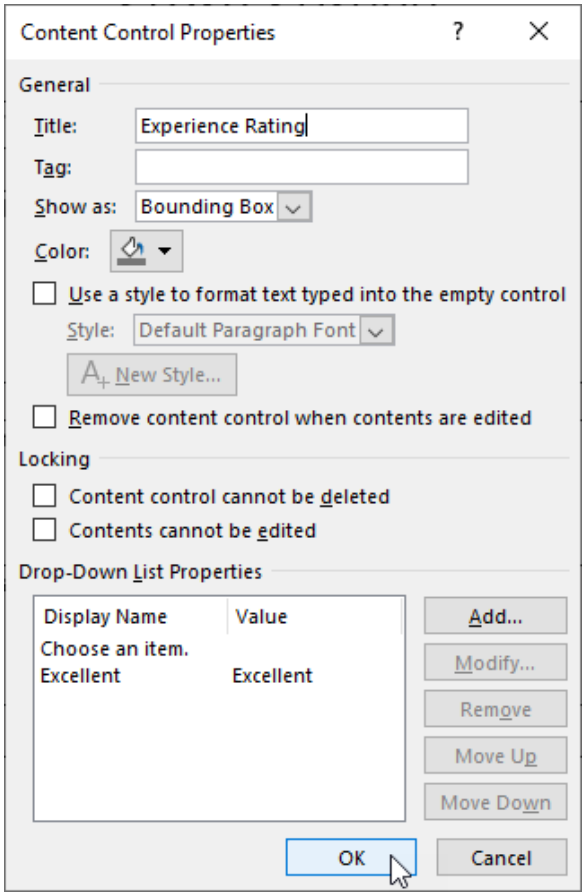
Many controls are identified by a title that appears at the top of its bounding box:



To modify a title (or to add one if none is present), select the control and click **Developer → Properties**:



The Properties dialog box for that control will open. Enter the desired title in the appropriate field and click **OK**:

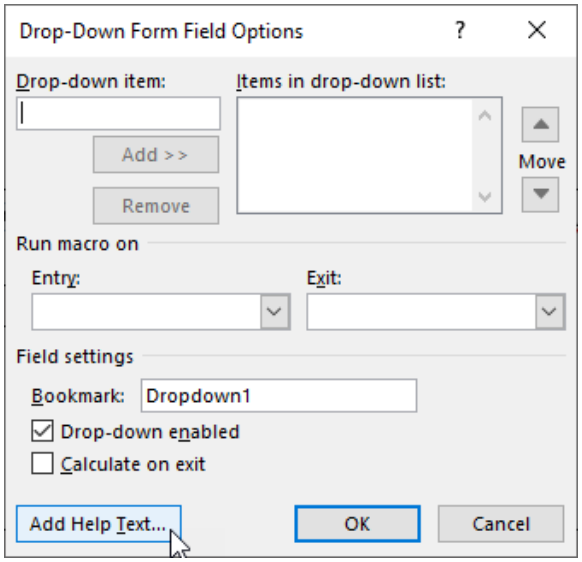


The title will now be applied:

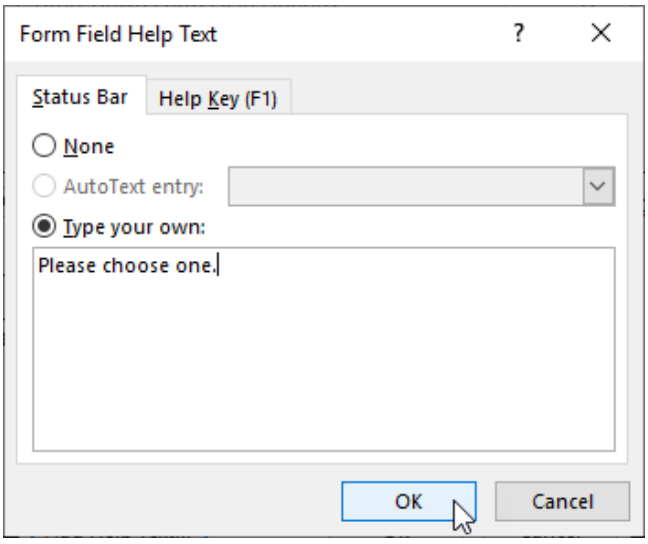
Adding Help Contents to Form Fields

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 → Properties**. Then, click the **Add Help Text** button:



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**:

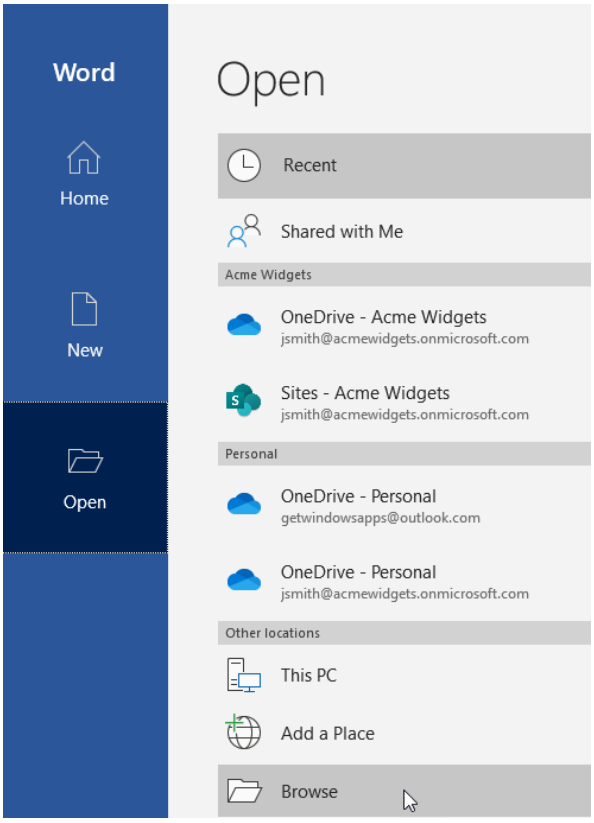


Once you click **OK**, the help information will be applied to the selected control.

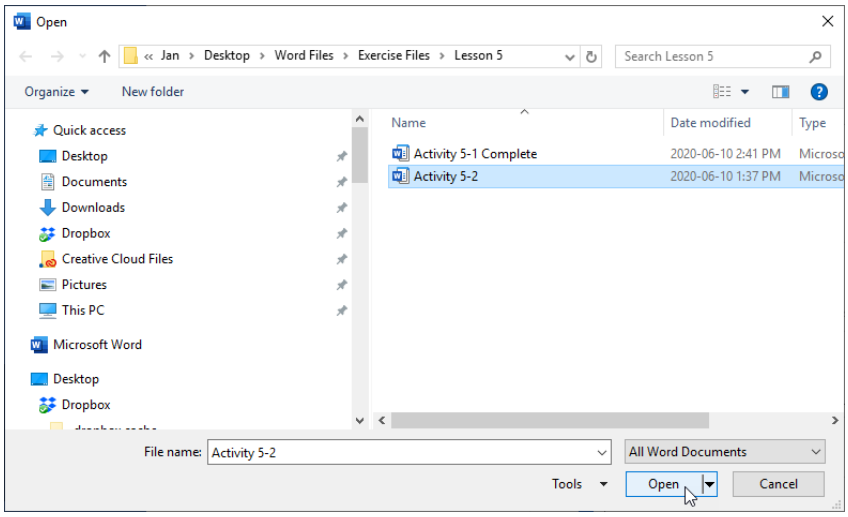
Activity 5-2: Manipulating Forms

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.

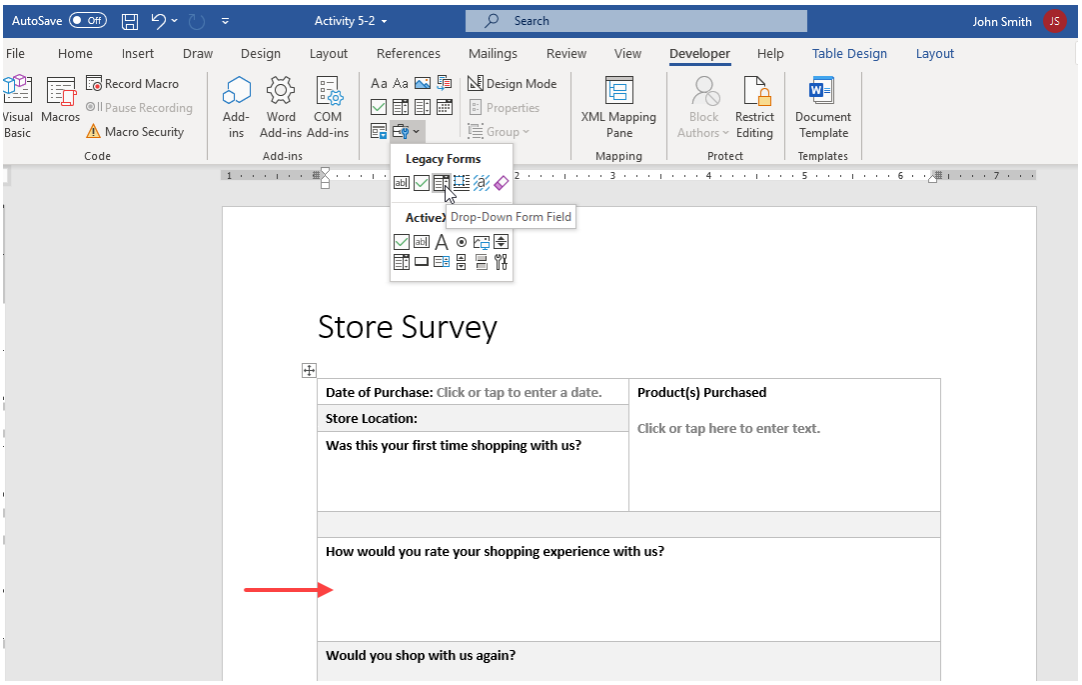
1. Open Microsoft 365 Word. At the Start screen, click **Open → Browse**:



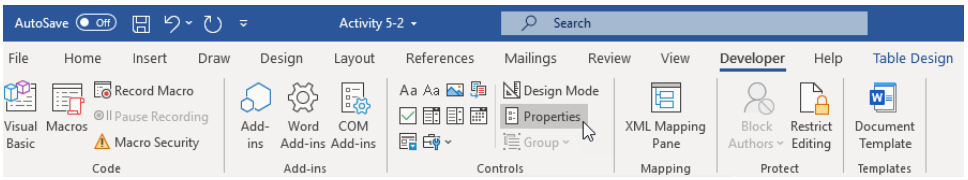
3. Browse to the Lesson 5 folder of your Exercise Files. Click to select Activity 5-2 and click **Open**:



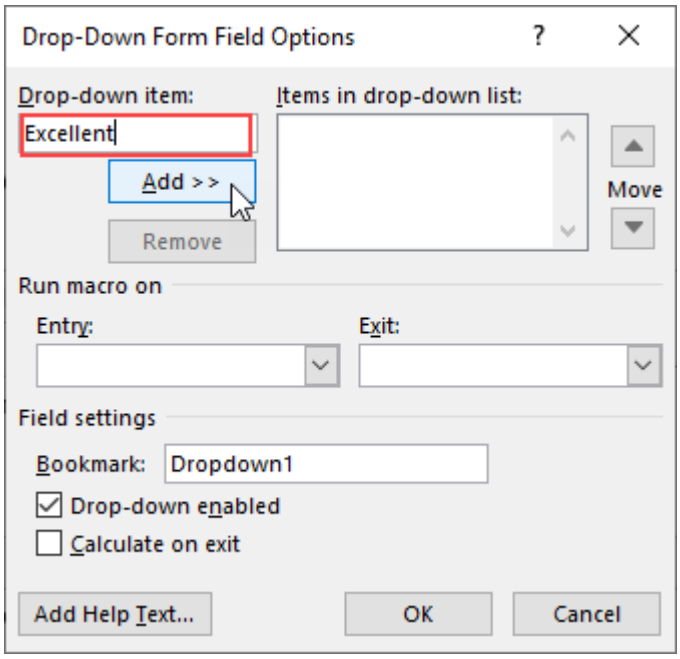
4. The template will open for editing. Click to place your cursor at the end of the line "How would you rate your shopping experience with us?" text. Press ENTER twice. Click **Developer → Legacy Tools → Drop-Down Form Field**:



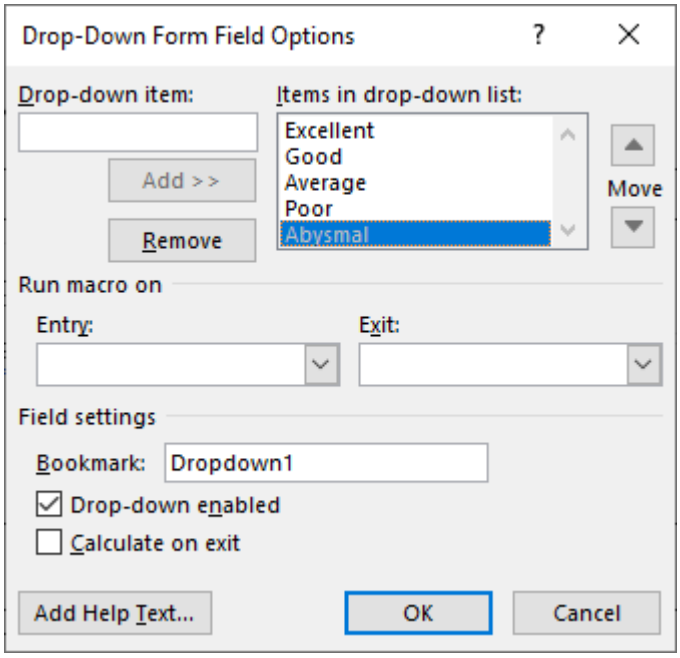
5. The field will be inserted. Now we should add entries to it. With the field still selected, click **Developer → Properties**:



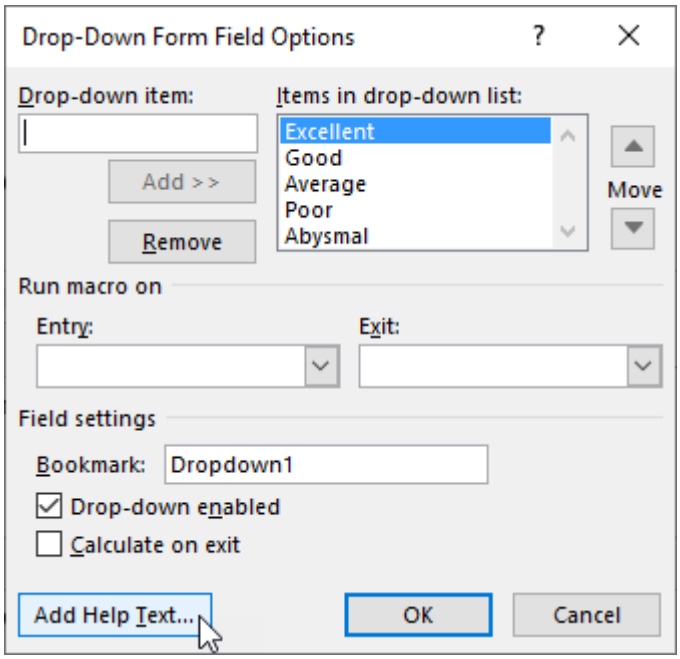
6. The Drop-Down Form Field Options dialog box will open. In the "Drop-down item" field, type "**Excellent**." Click **Add >>**:



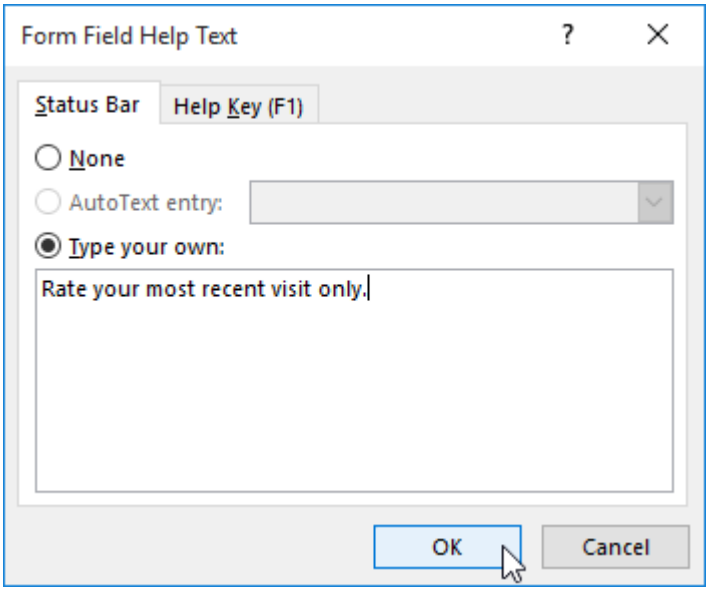
7. Repeat Step 6 to add entries for **Good**, **Average**, **Poor**, and **Abysmal**:



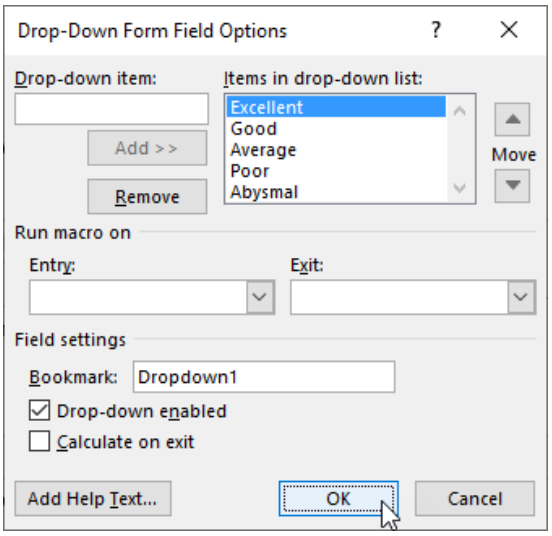
8. Click **Add Help Text**:



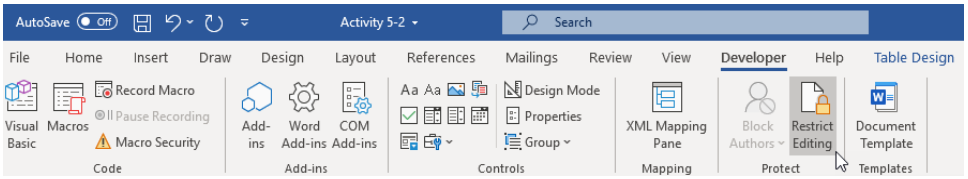
9. The Form Field Help Text dialog box will open. In the "Type your own" field of the Status Bar tab, type, "**Rate your most recent visit only.**" Click **OK**:



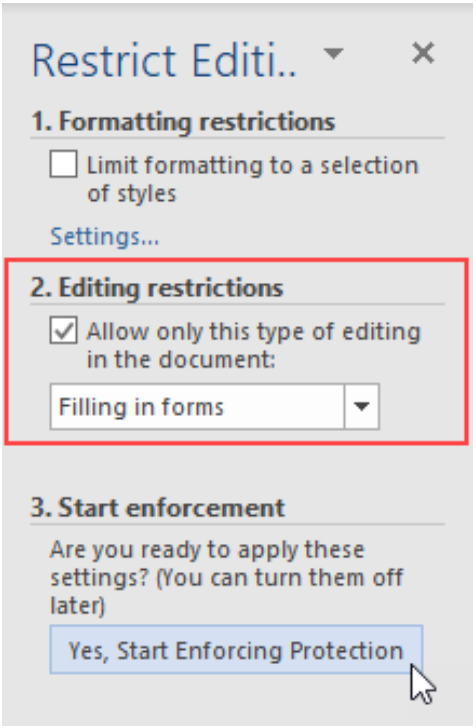
10. Click **OK** in the Drop-Down Form Field Options dialog box:



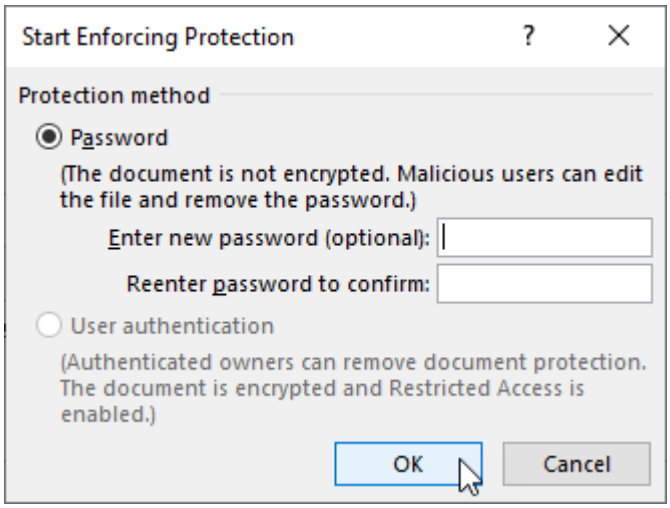
11. Let us test our new field. Click **Developer → Restrict Editing**:



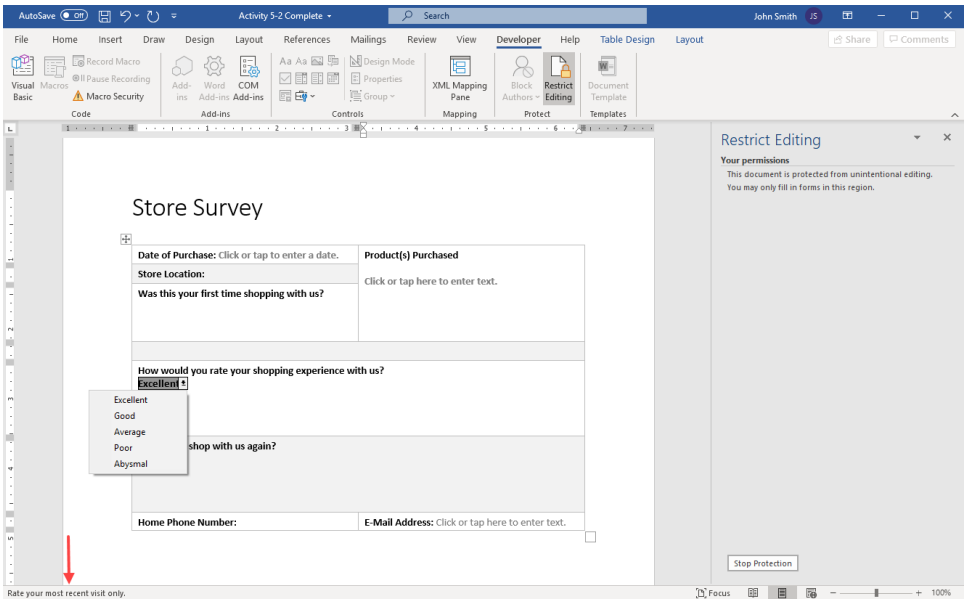
12. You will see the Restrict Editing task pane appear. Check the second box and choose "**Filling in forms**" from the drop-down menu. Then, click **Yes, Start Enforcing Protection**:



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:



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.

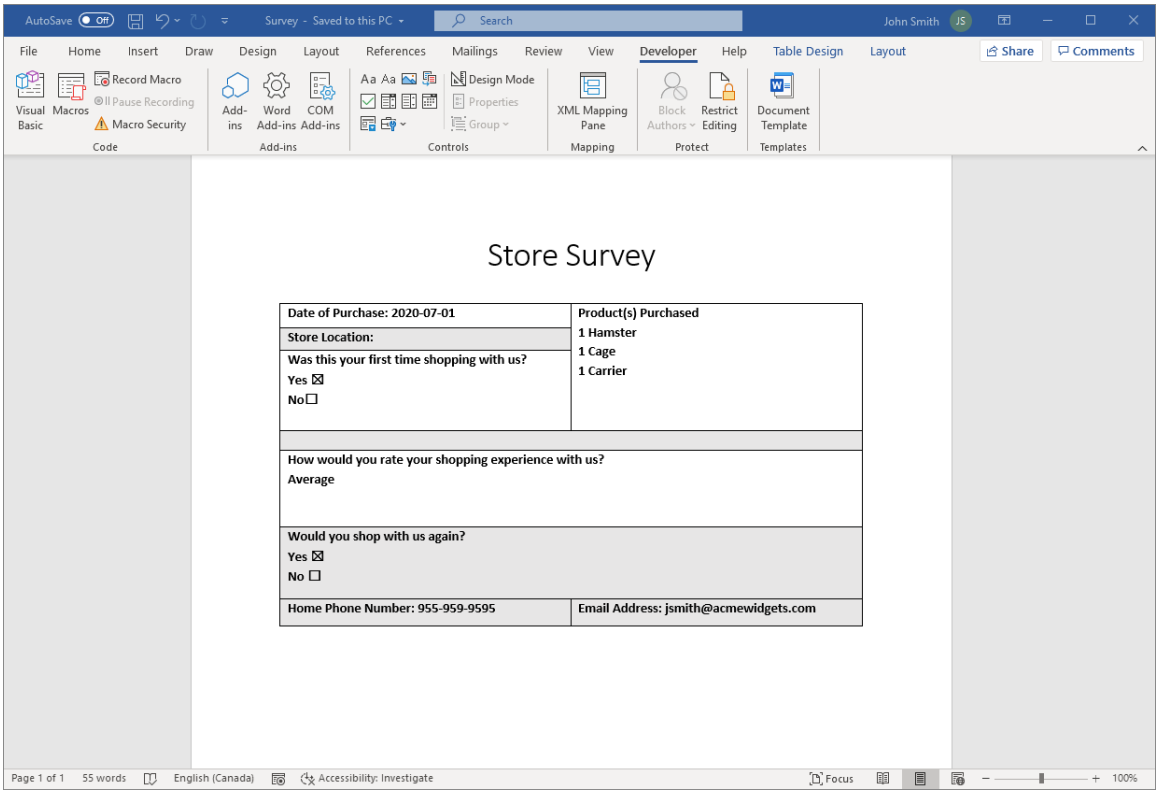
Topic Objectives

In this session, you will learn:

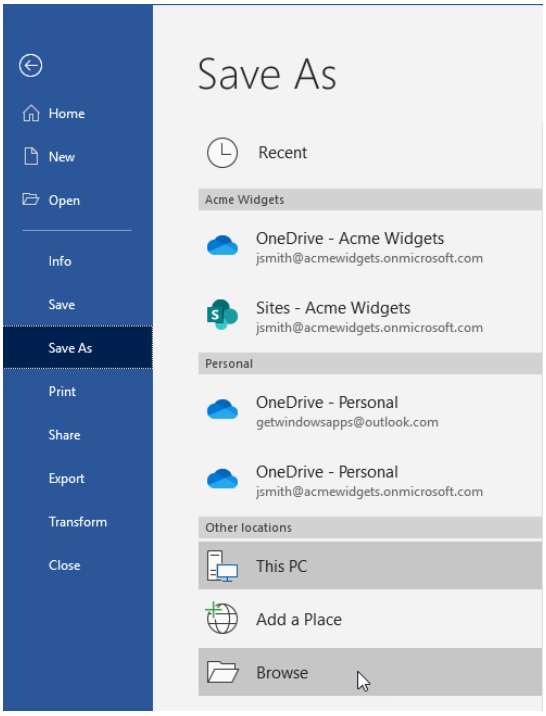
- How to save form data as a plain text file
- How form data is saved
- How to link a form to a database
- How to set tab order for controls

Save Form Data as a Text File

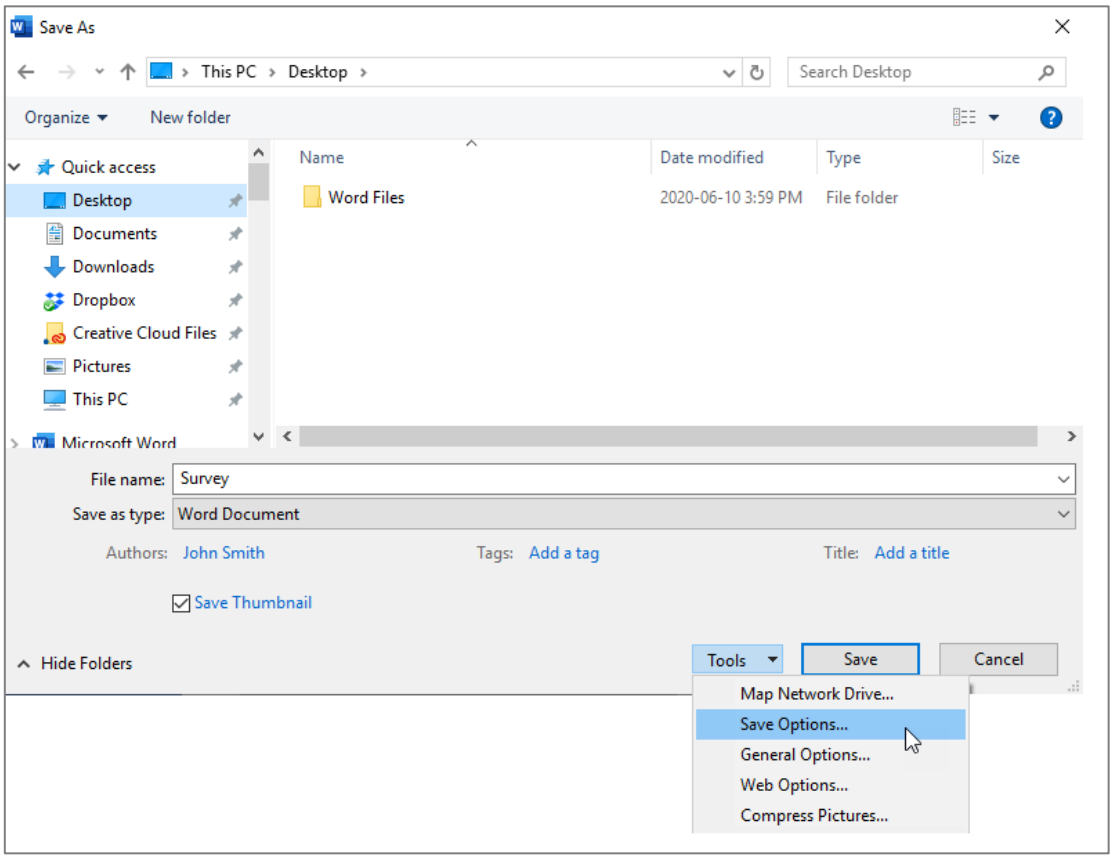
Here is a sample form that uses legacy controls. You can see that the form has been filled out:



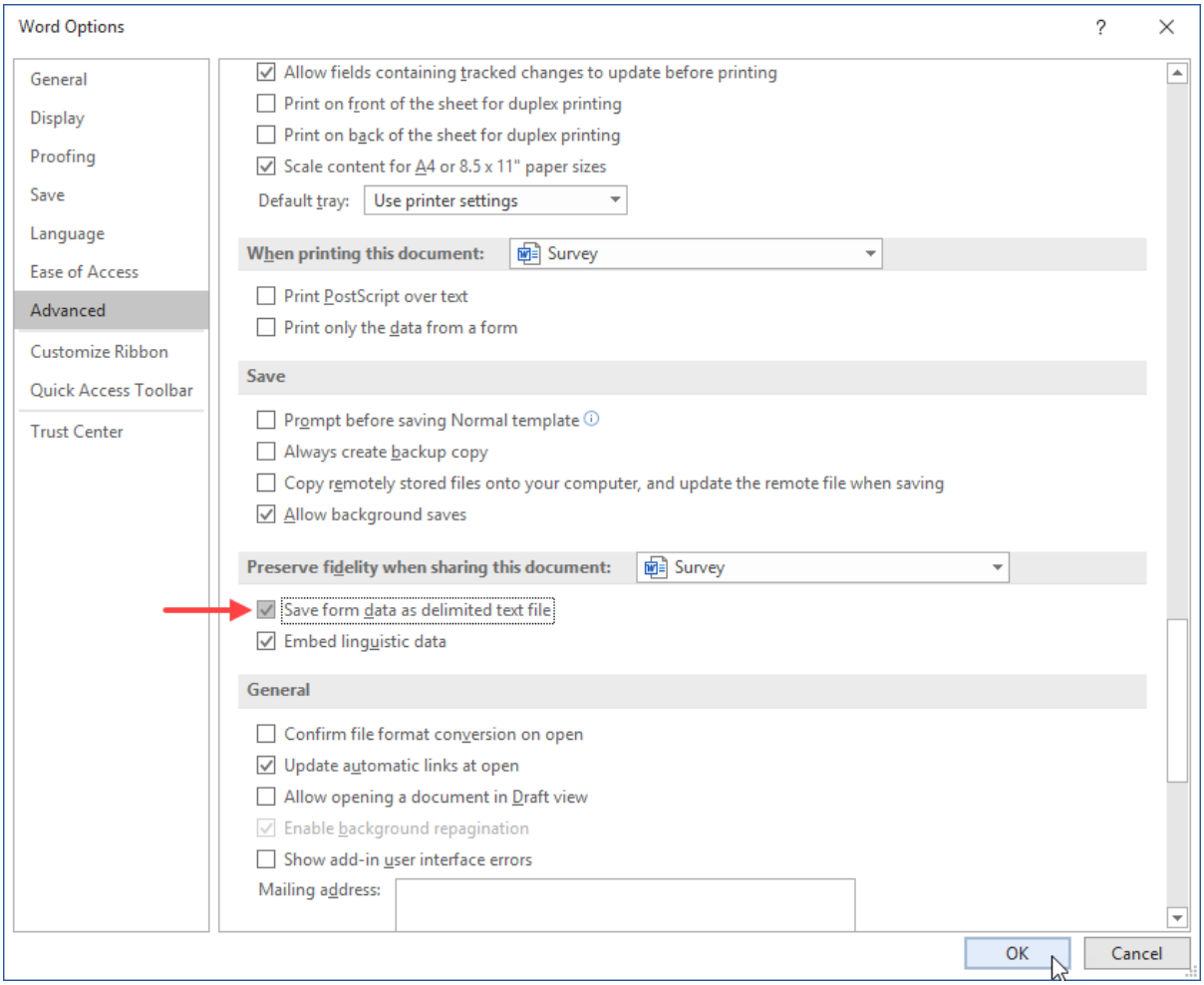
To save form data as plain text, click **File → Save As → Browse**:



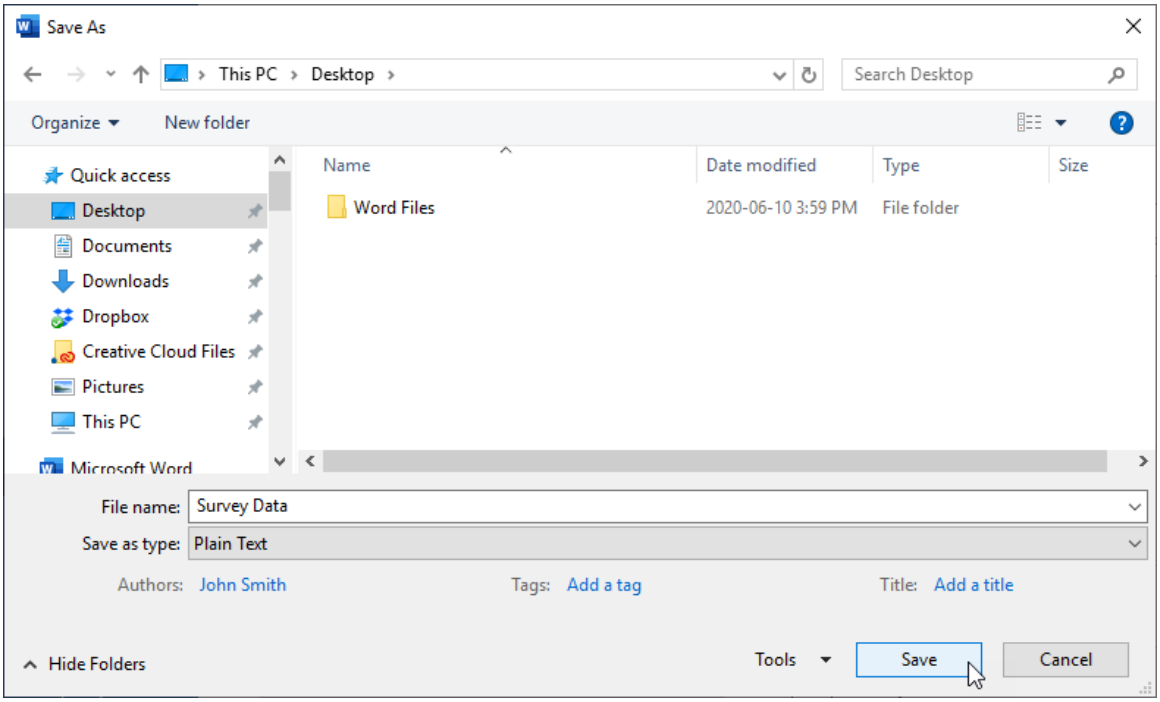
Then, in the Save As dialog box, click **Tools → Save Options**:



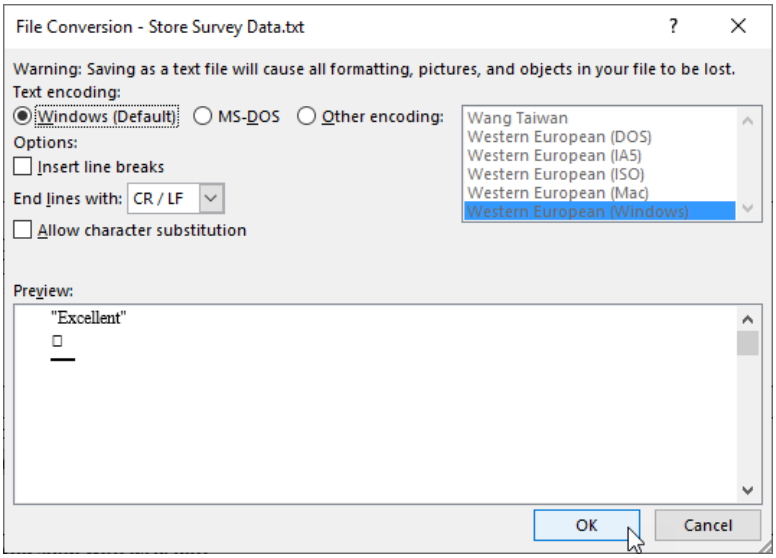
Click the Advanced category and check "**Save form data as delimited text file**:"


Word Options
General
Display
Proofing
Save
Language
Ease of Access
Advanced
Customize Ribbon
Quick Access Toolbar
Trust Center
Allow fields containing tracked changes to update before printing
Print on front of the sheet for duplex printing
Print on back of the sheet for duplex printing
Scale content for A4 or 8.5 x 11" paper sizes
Default tray: Use printer settings
When printing this document: Survey
Print PostScript over text
Print only the data from a form
Save
Prompt before saving Normal template
Always create backup copy
Copy remotely stored files onto your computer, and update the remote file when saving
Allow background saves
Preserve fidelity when sharing this document: Survey
Save form data as delimited text file
Embed linguistic 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 user interface errors
Mailing address:
OK
Cancel

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**:



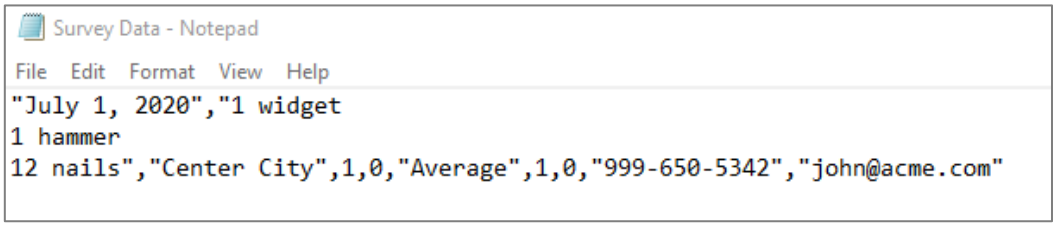
After you click **Save**, you will see the File Conversion dialog box:



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

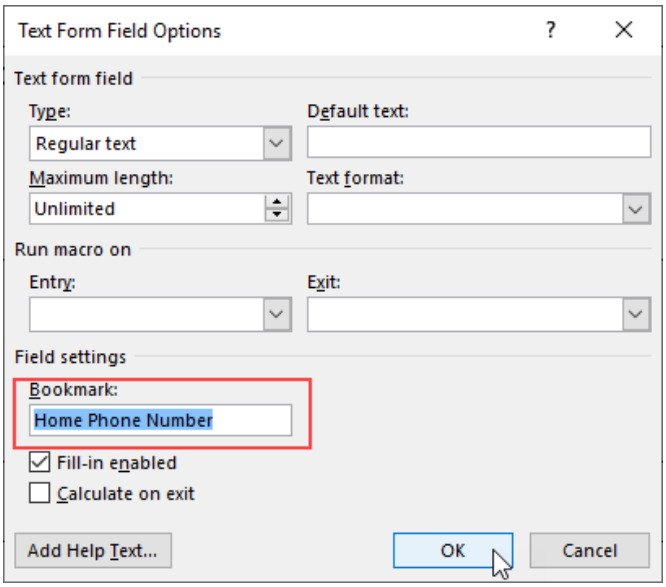
When you open a plain text file that contains form data, you will see the information that was entered in the fields:



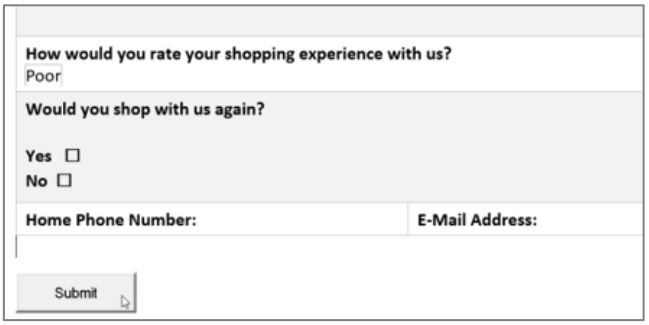
Most of the data should be quite readable. Checkboxes will be represented as 1 for Yes and 0 for no, with the first number representing the selected value.

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:



You can then create a button to execute the macro and transfer the data in each form field to the appropriate database field:



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

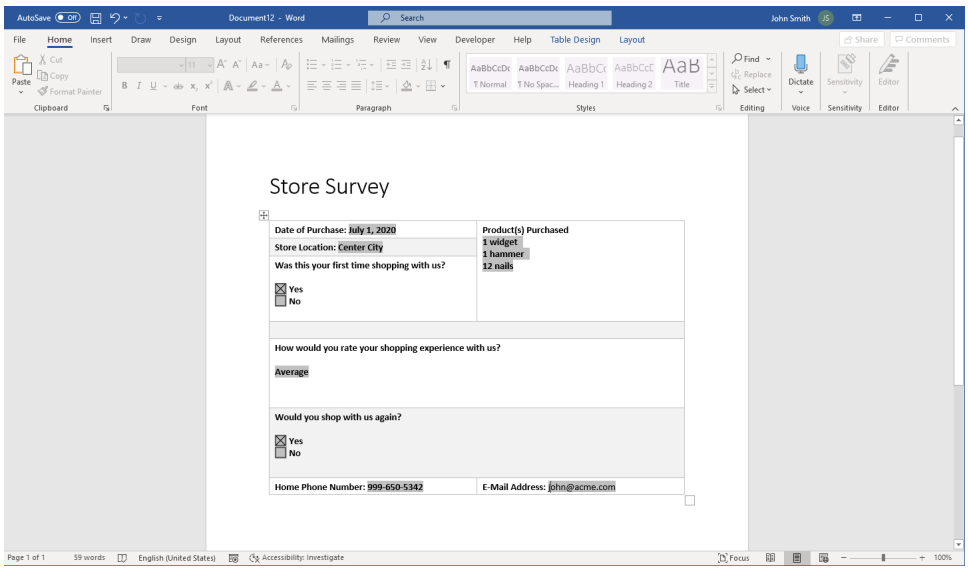
In order to speed up data entry, form developers often choose to set the order in which fields are selected when the user presses the Tab key. Unfortunately, there is no interface command for this feature when using Word forms. You must manually code a macro to achieve this. This process requires advanced knowledge of Visual Basic, and is beyond the scope of this manual.

Activity 5-3: Converting Form Data

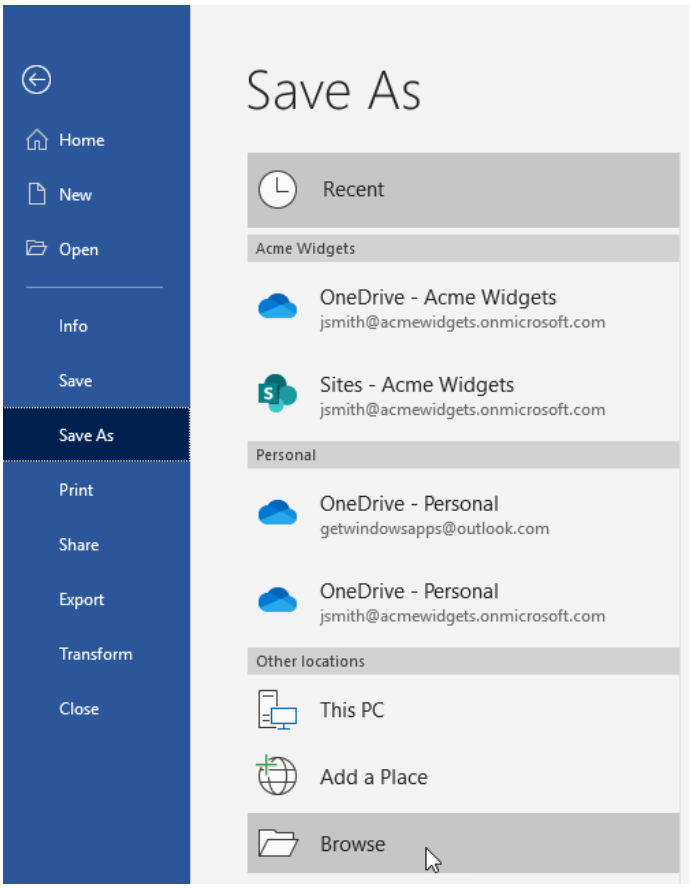
In this activity, you will fill out a form, save the data as plain text, and view the converted file.

1. Open Microsoft 365 Word and create a new document based on Activity 5-3:

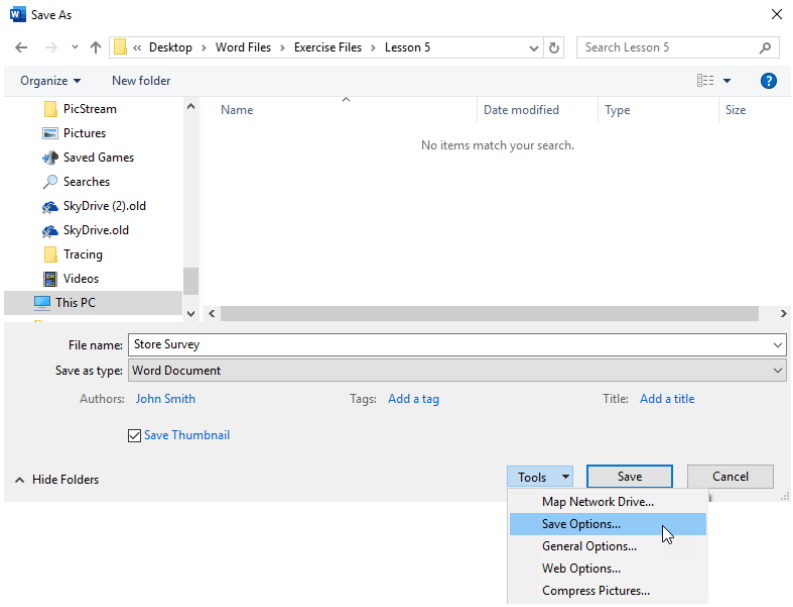
2. Fill out the form by entering data in the appropriate fields and using the provided controls:



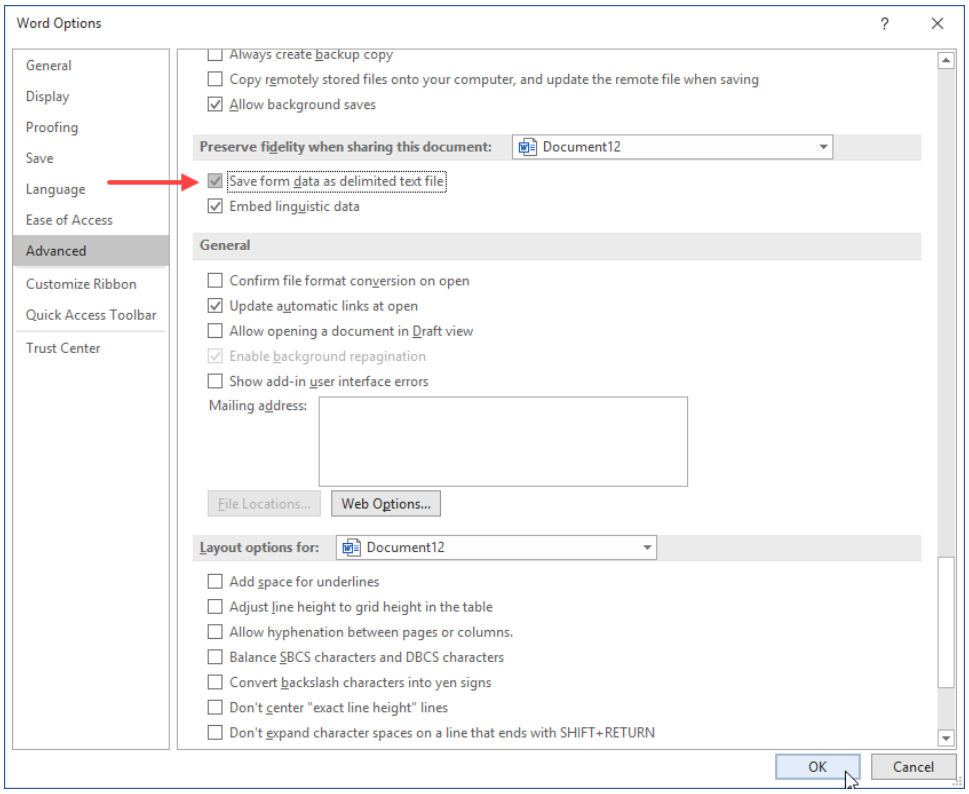
3. Next, click **File → Save As → Browse**:



4. In the Save As dialog box, click **Tools → Save Options**:

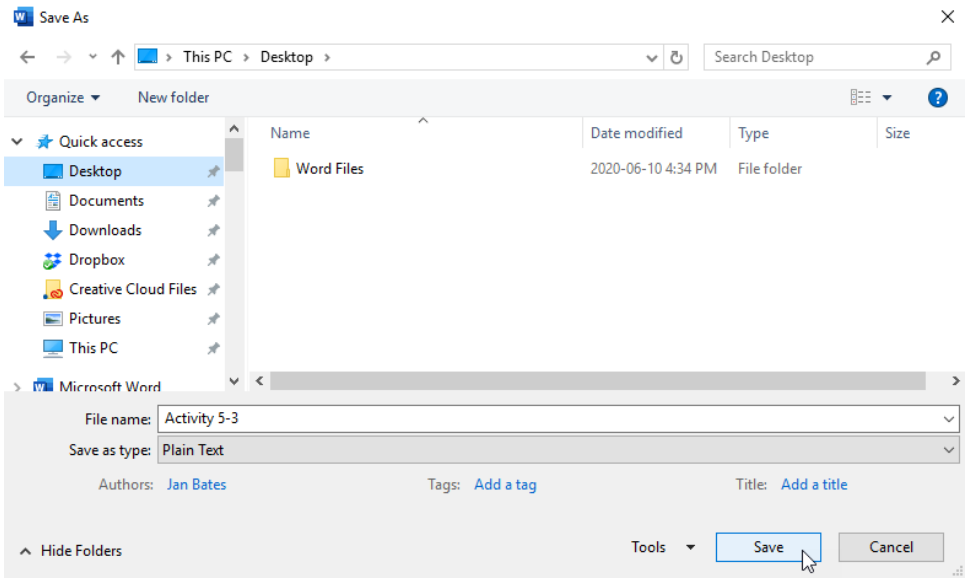


5. Click the **Advanced** category. Scroll to the "Preserve fidelity when sharing this document" section. Check "**Save form data as delimited text file**:"

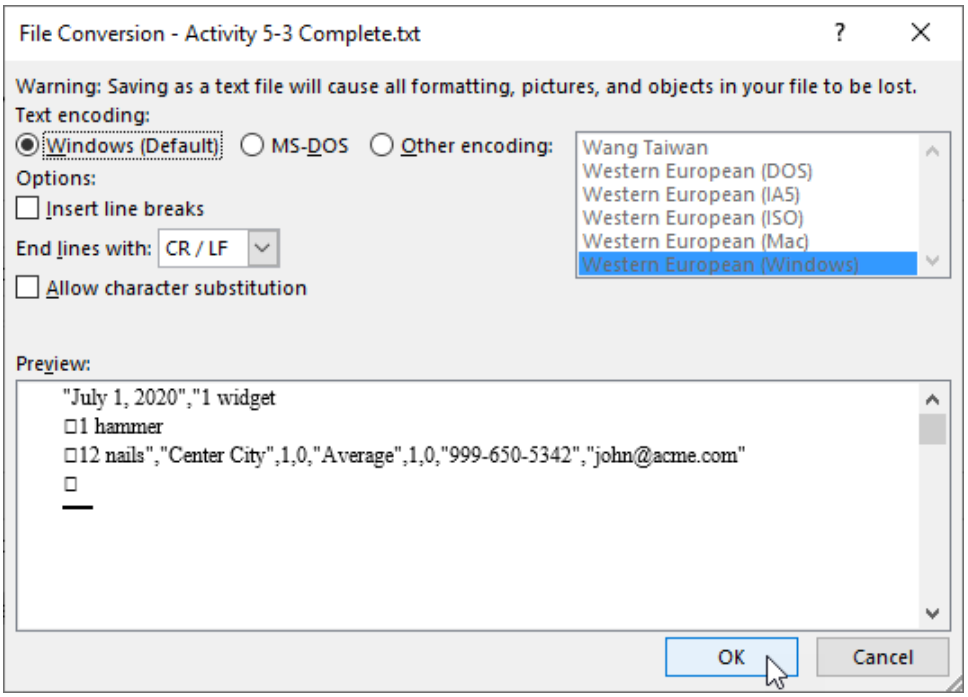


Click **OK**.

6. 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**:

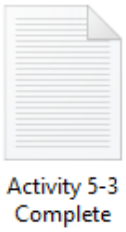


7. Click **OK** in the File Conversion dialog box to complete the process:

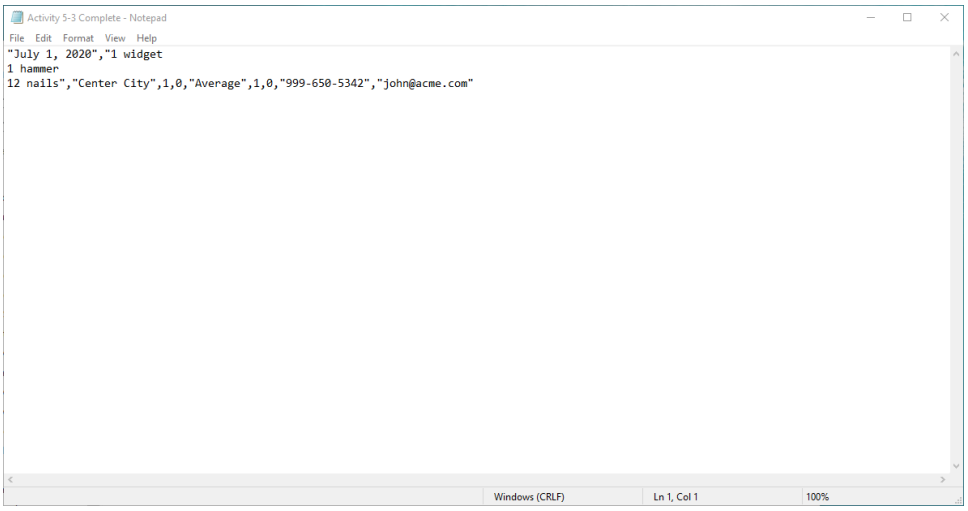


8. Close Microsoft 365 Word. Do not save any changes to the document.

9 Find the document you saved to your desktop and double-click it:



10. Notepad (or a similar program) should open and you will see the data that you entered:



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

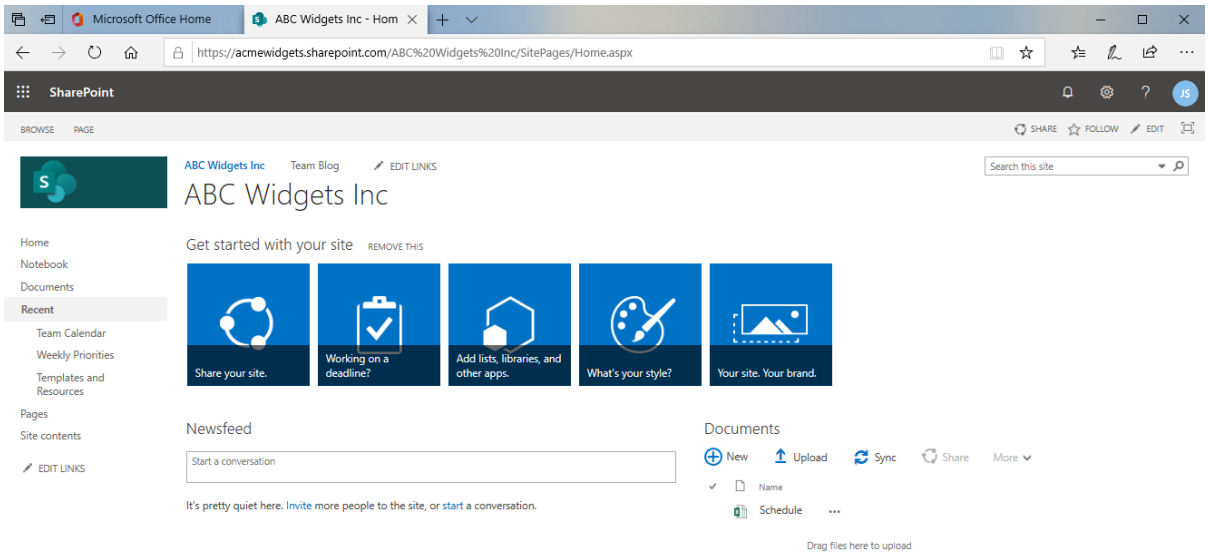
In this session, you will learn:

- 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:

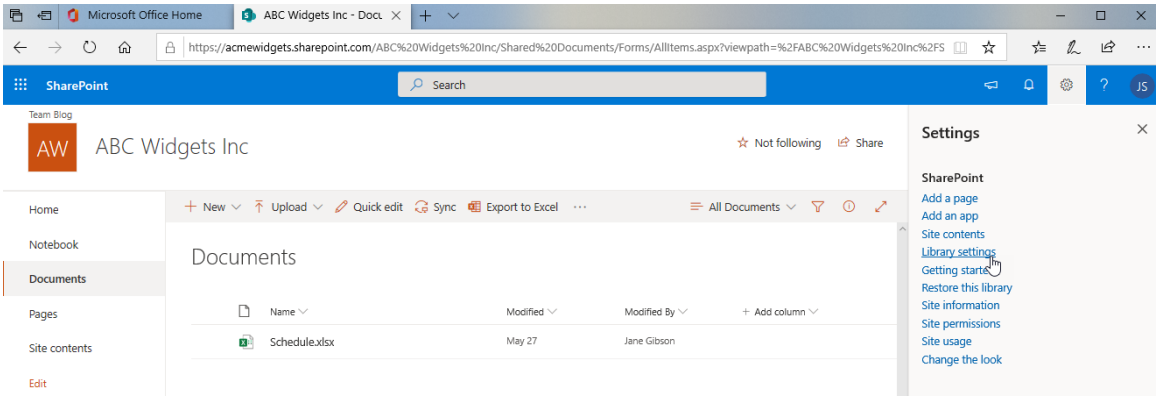


Versioning

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.

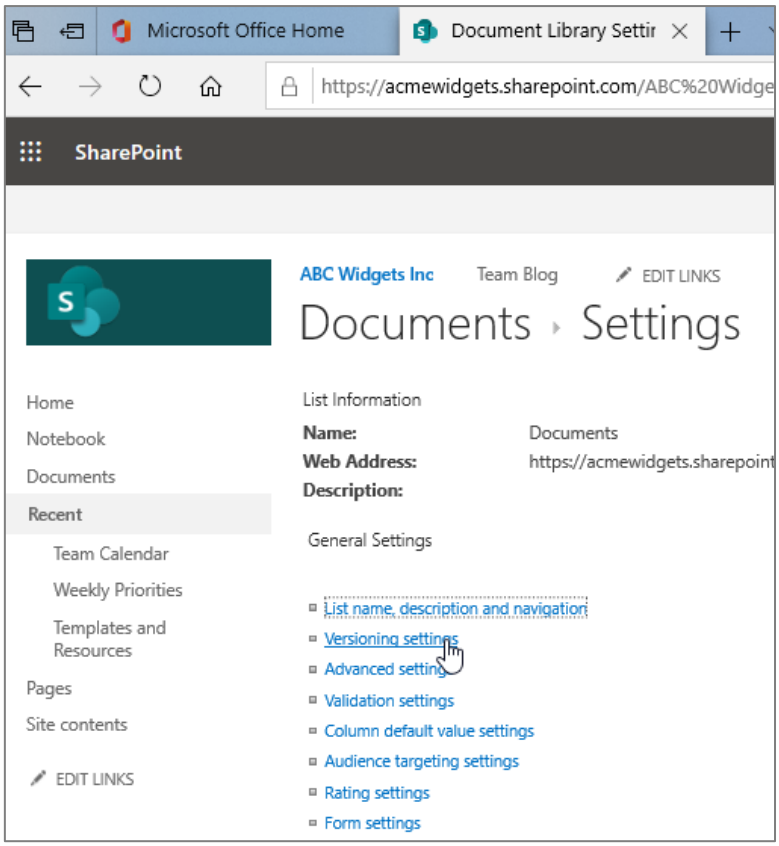
Versioning Settings

To enable versioning in a SharePoint Server library, open the desired library. Then, click **Settings → Library settings**:

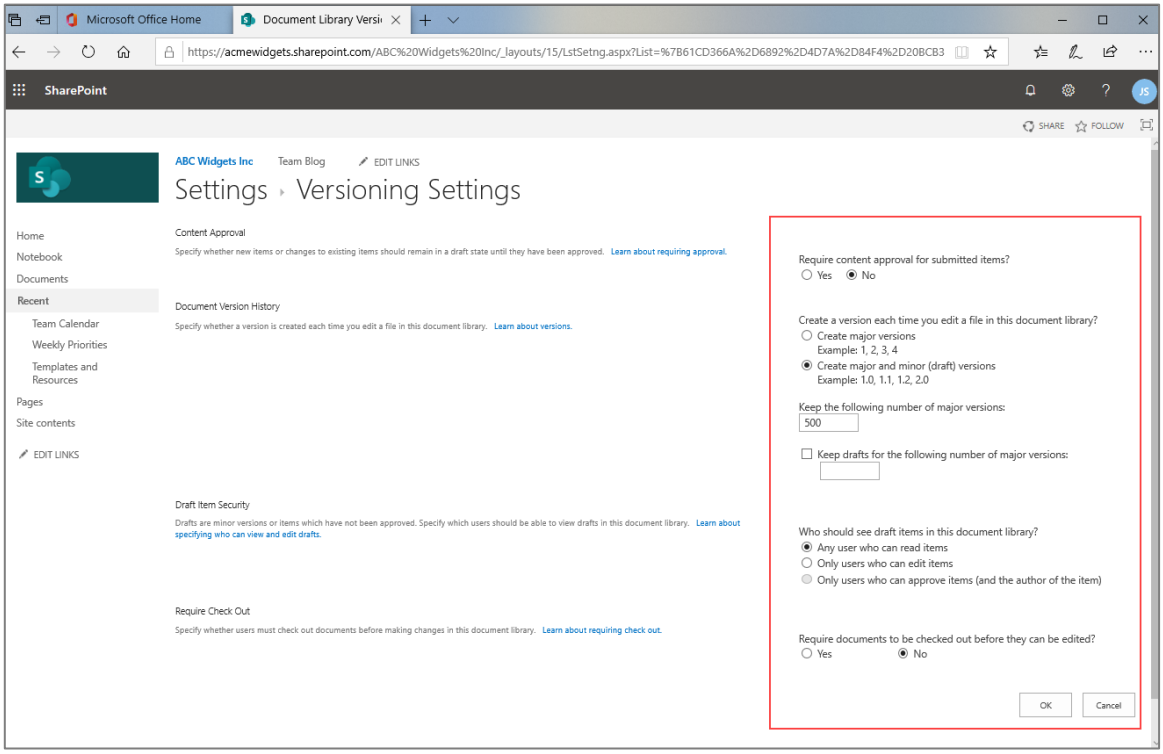


(You may require administrative privileges to access this command.)

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:



Simply choose the desired options and click **OK** at the bottom of the page.

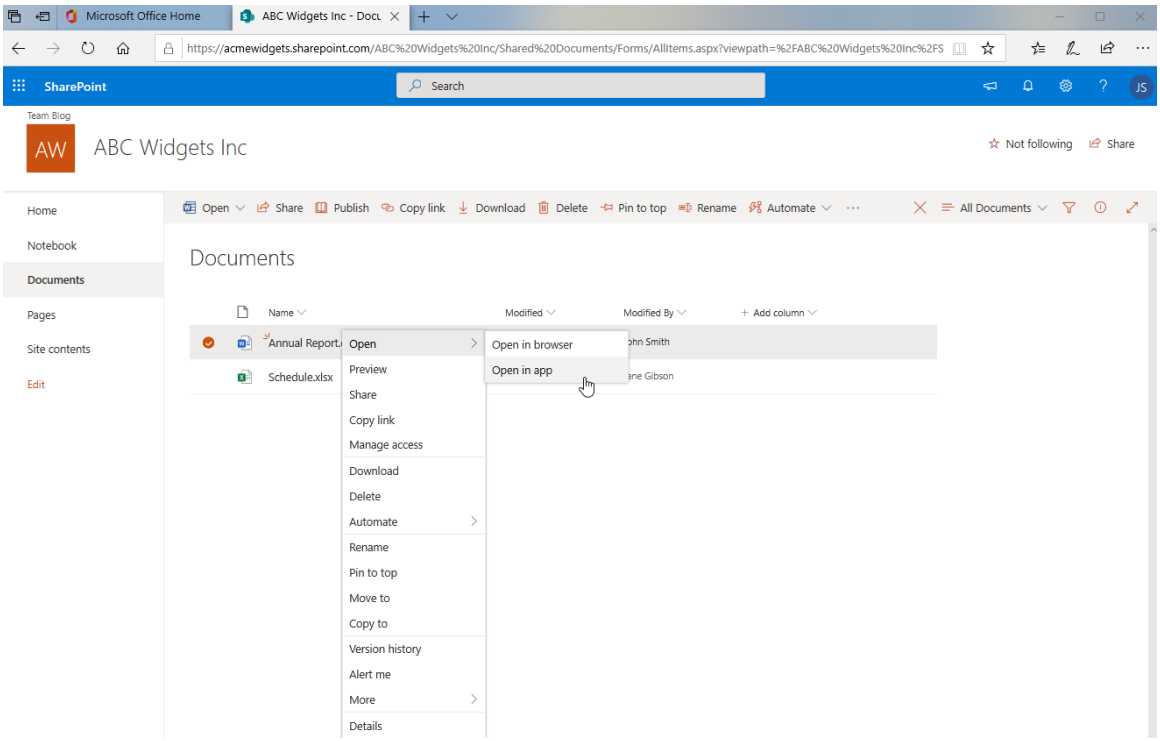
Major versus Minor Versions

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.

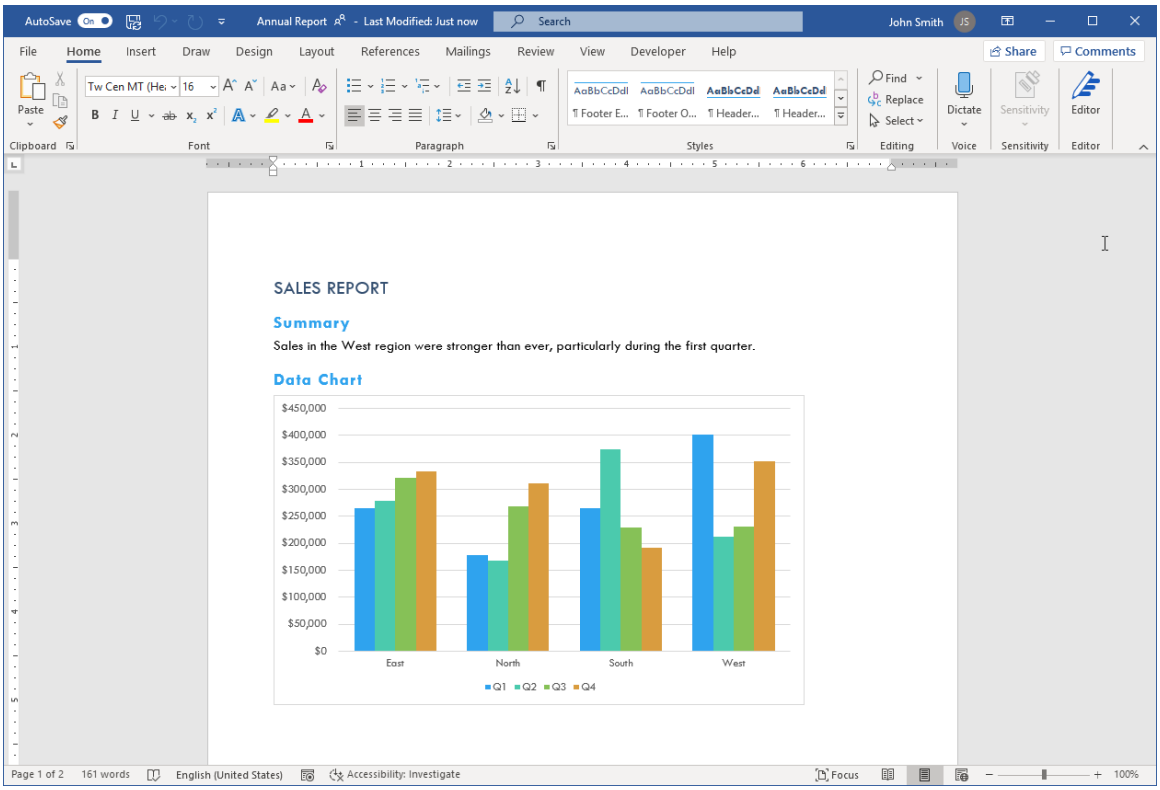
Consider a standard operating procedure document (SOP) for the production of a widget. A minor revision to the SOP might include a new subsection or an address change. A major revision might include adding or removing an entire section from the SOP.

Accessing Documents Directly from a SharePoint Site

To open a document stored on a SharePoint server, right-click it and click **Open → Open in app**:



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:



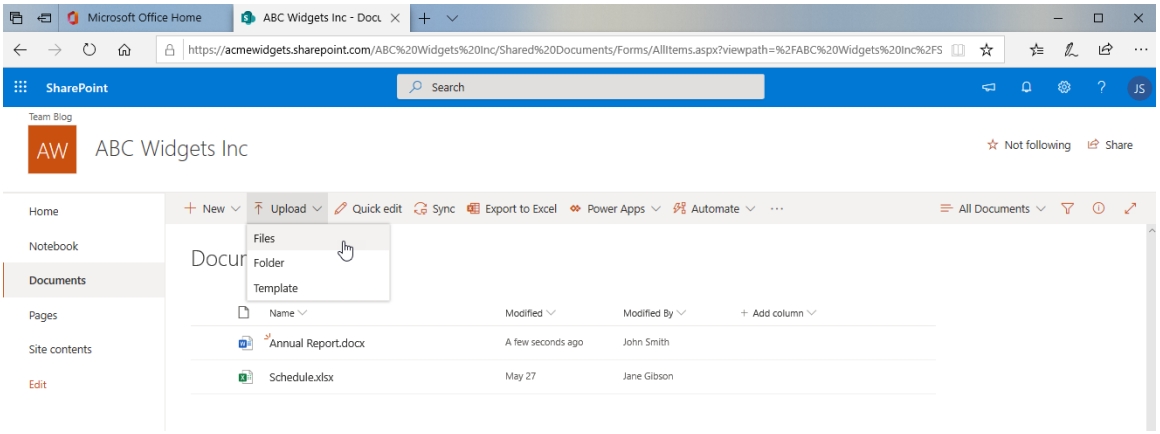
This file is still saved on the SharePoint server. Therefore, if you click **Save** in the Quick Access toolbar or click **File → Save**, you will be directly saving the file to SharePoint. You will notice that the Save command looks a bit different because of this:

As well, when saving content to a SharePoint server, you may be asked to enter your username and password to complete the operation.

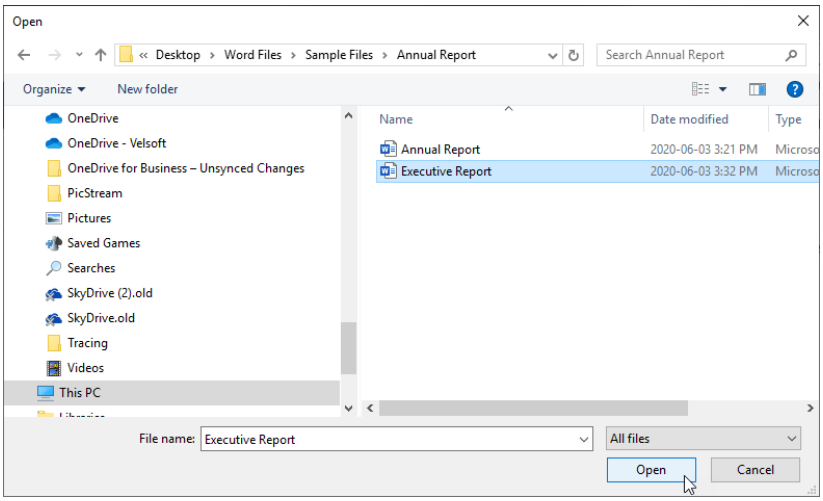
Begin Working with Document Versions

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:



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:

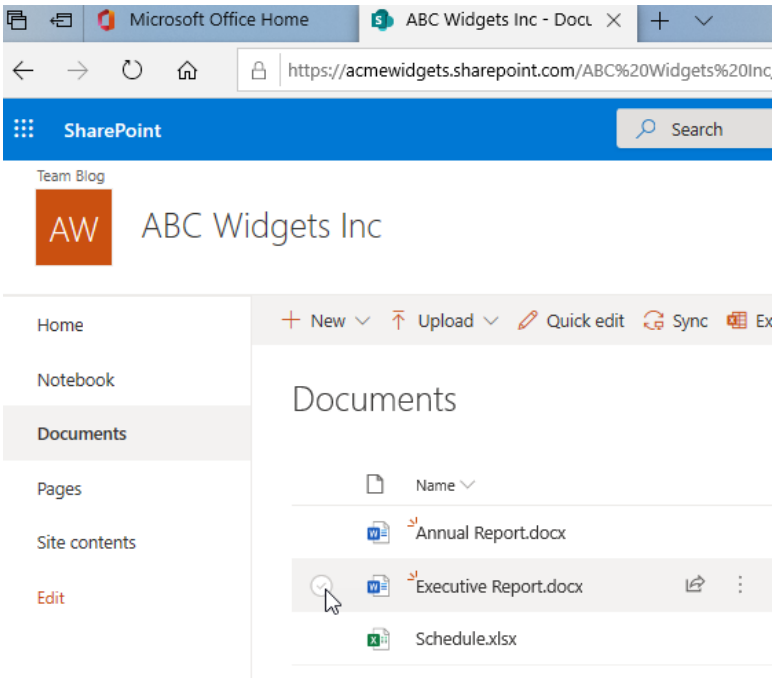


Checking Out a Document with the SharePoint Server

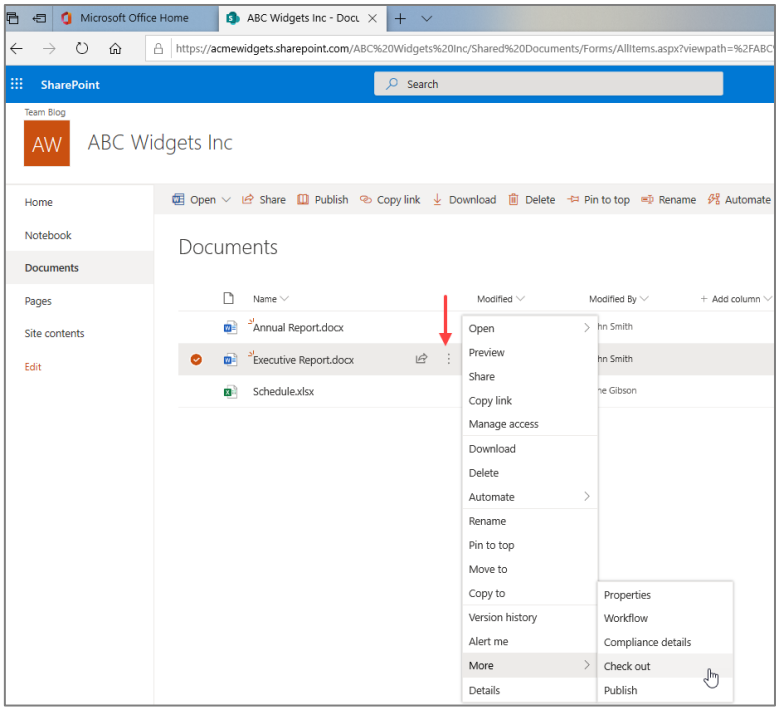
In order to keep track of what is happening with documents that are uploaded to a SharePoint server, you can use the Check In/Check Out commands. This system works just like a library or video rental store. Once the item has been added to the repository, it can be checked out, used in some way, and then 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.

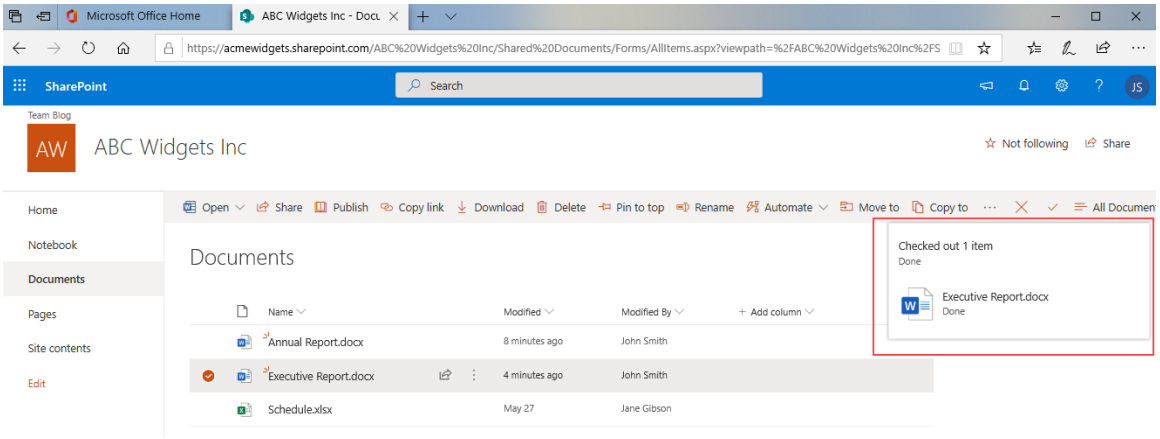
In order to check out a file, you will need to select it. Do this by clicking the box to the left of the file name:



With the file selected, click the **ellipses (…) → More → Check Out**:



You will be notified that the file has been checked out:

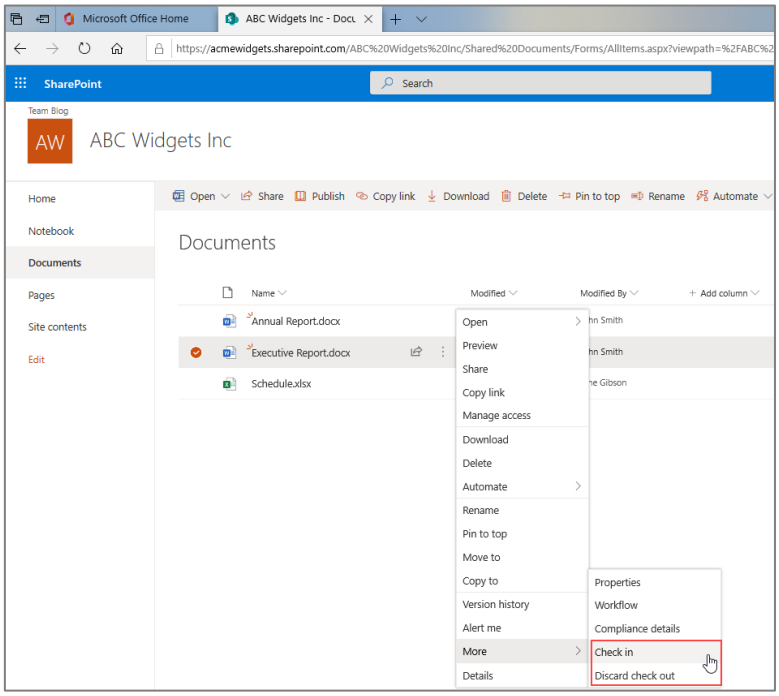


The check-out notification to the right of the file name will identify that the file has been checked out:

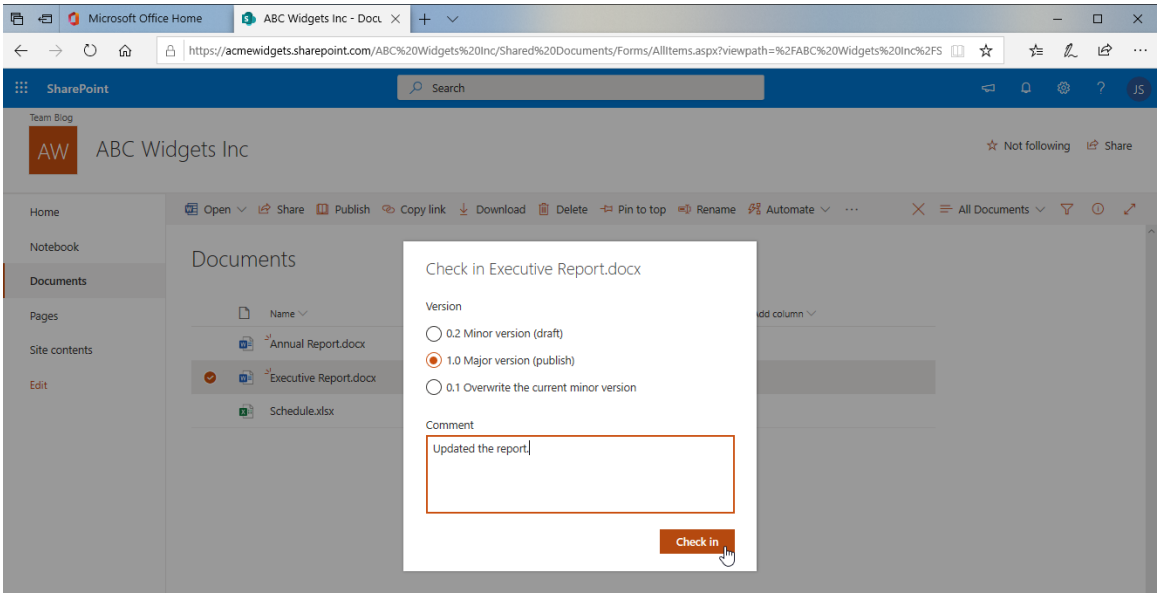
You can now download, edit, and save it as previously discussed.

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 (⋯) → More → Check in** (or, **Discard check out**):



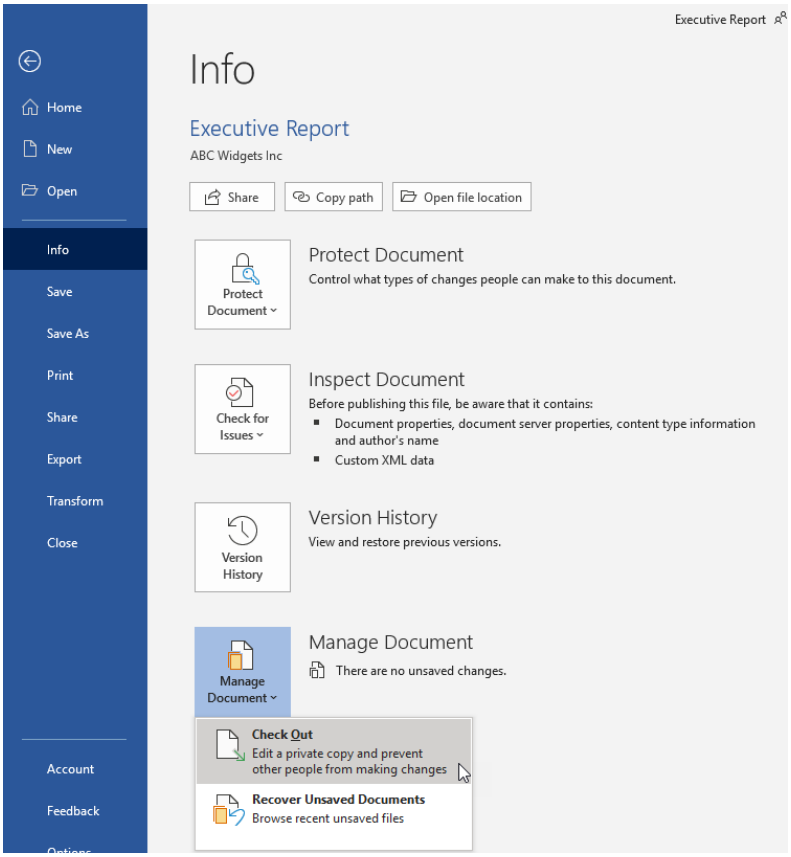
If you click **Discard check out**, you will be prompted to check in any unsaved changes. If you click Check In, you will be prompted to set your version options and add a comment. Then click **Check in**:



The document will now be checked in.

Checking Out a Document Using Word 365

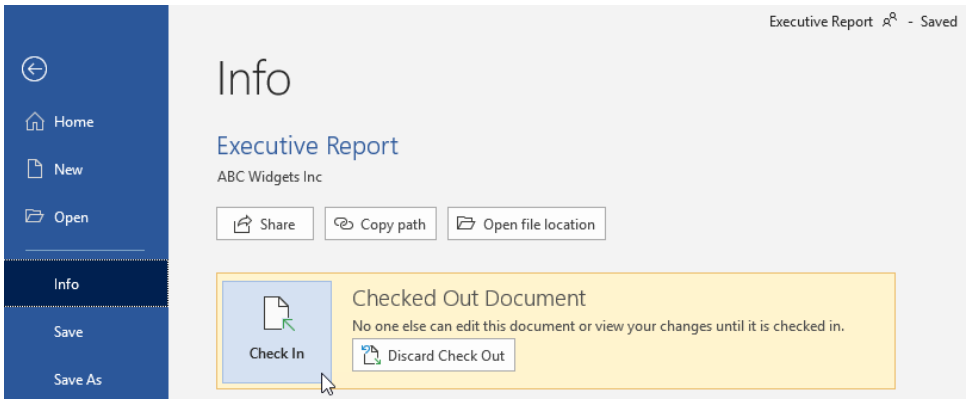
You can also check out a document after it has been opened in Microsoft Word 365. Click **File → Info → Manage Document → Check Out**:



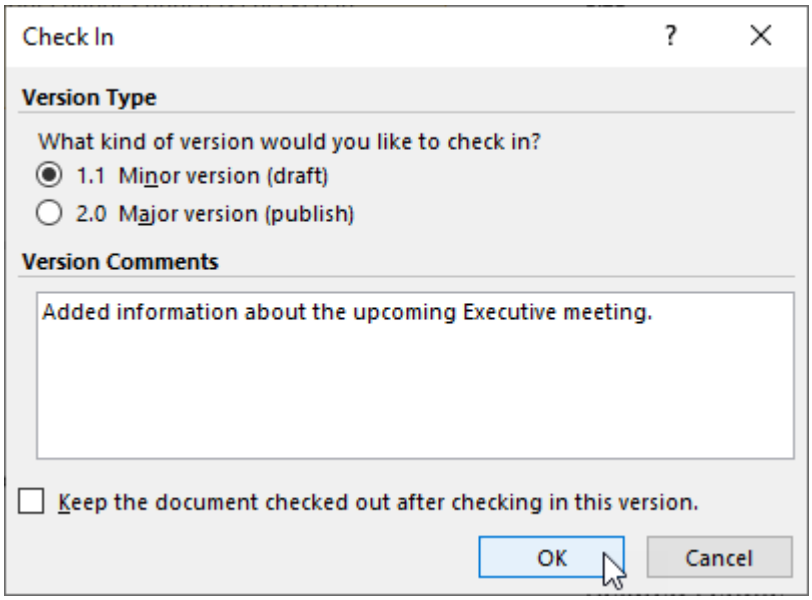
The document will then be checked out. (You may be prompted to enter your user name and password before this can be done.)

Checking in a Document Using Word 365

To check a document back in, click **File → Info → Check In**:



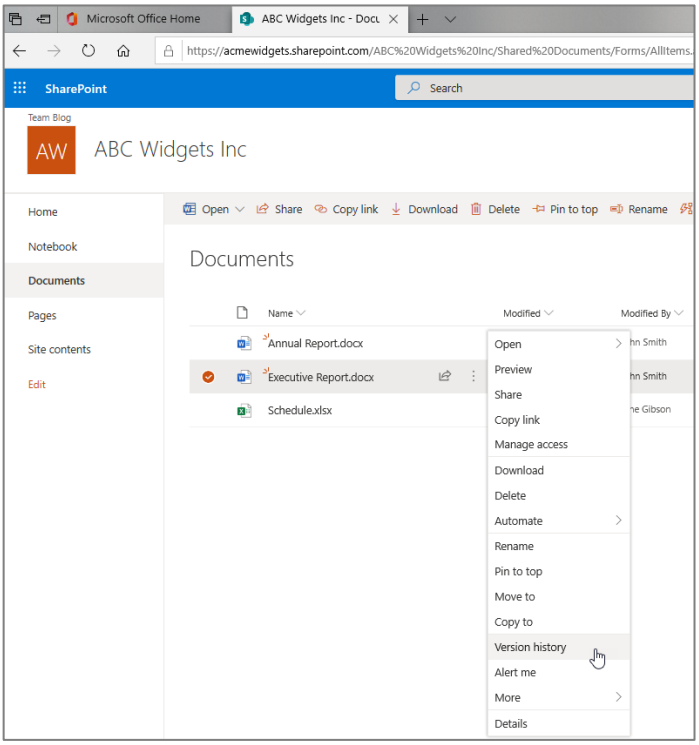
(Notice that you can also discard the check out from here.) You can now enter the details of the check in:



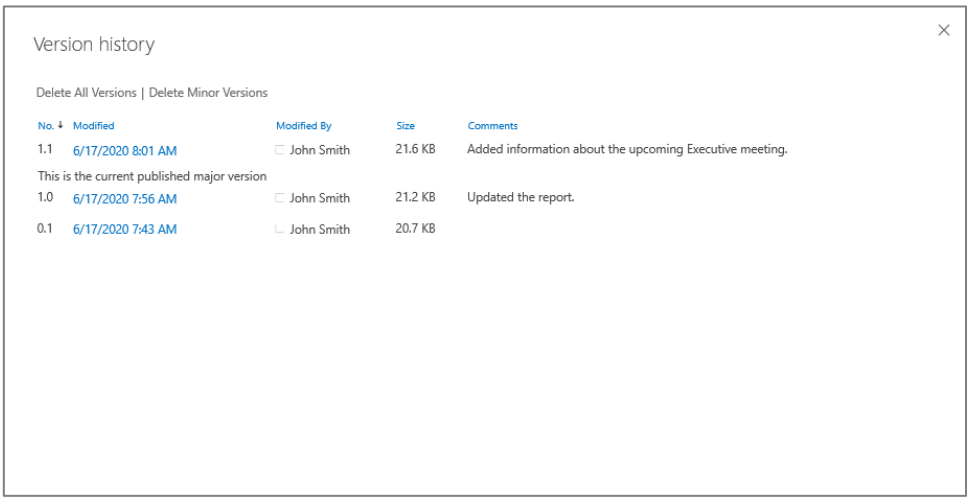
Once you click **OK**, the file will be checked back in.

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**:



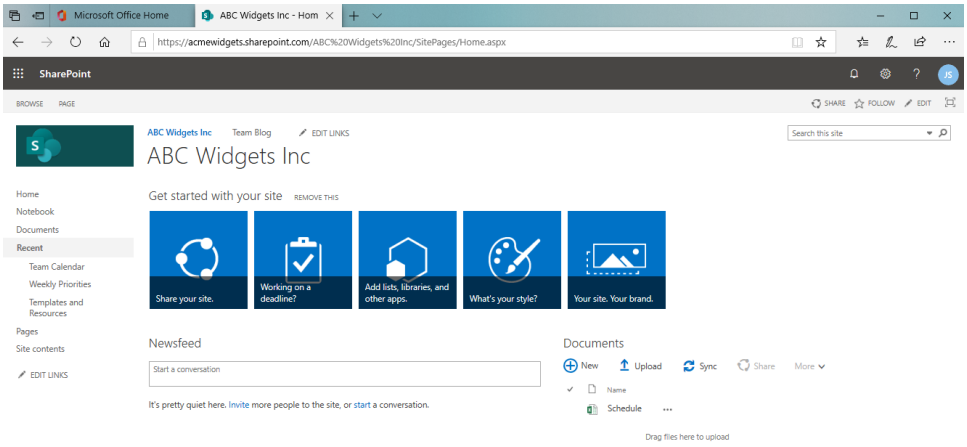
Version history will be shown. Click the **X** to close once you are finished.



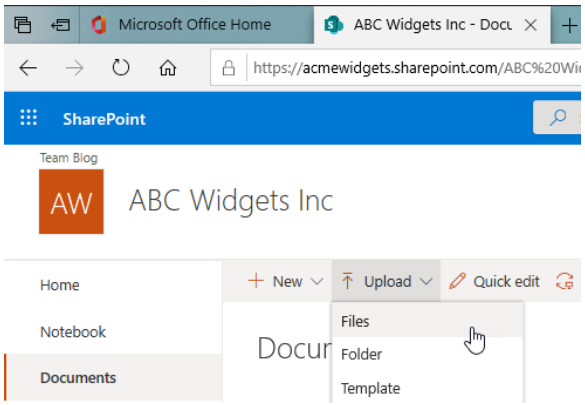
Activity 6-1: Creating a New Document Version

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.

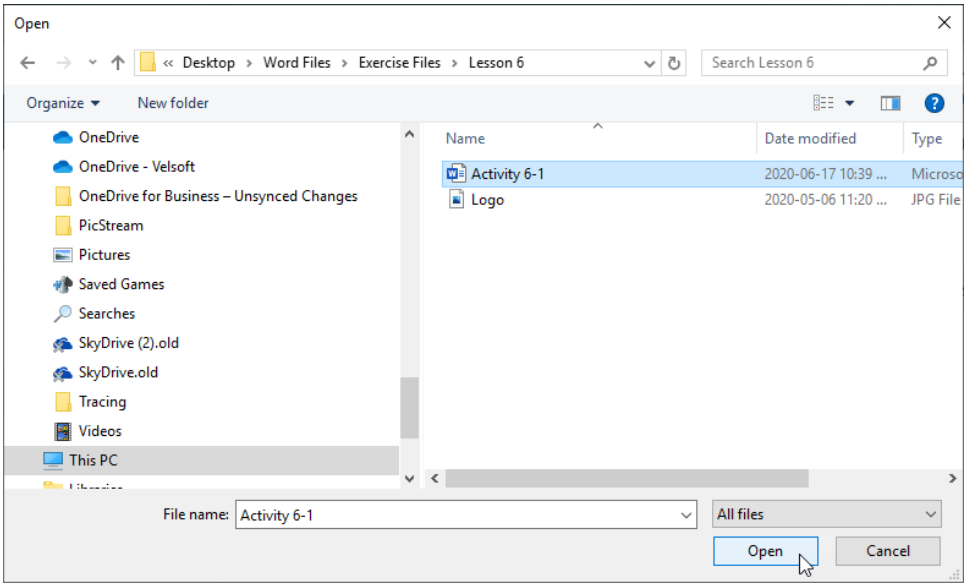
1. Open your browser and navigate to your SharePoint site:



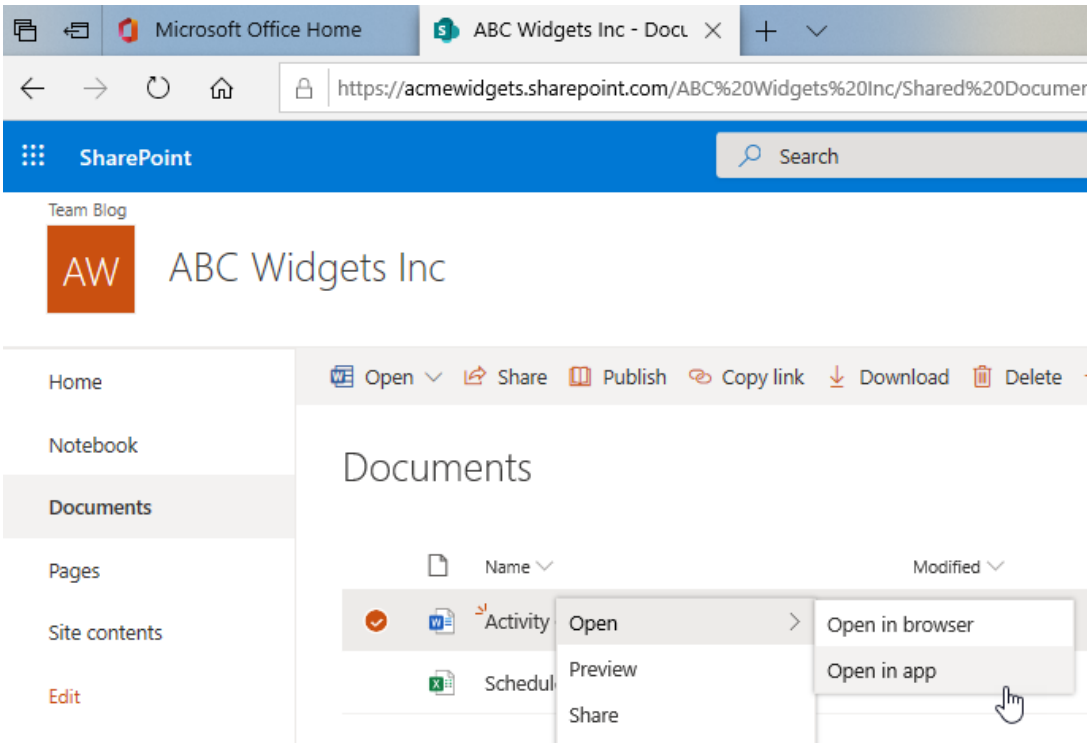
2. Open the Documents library. Click **Upload** → **Files**:



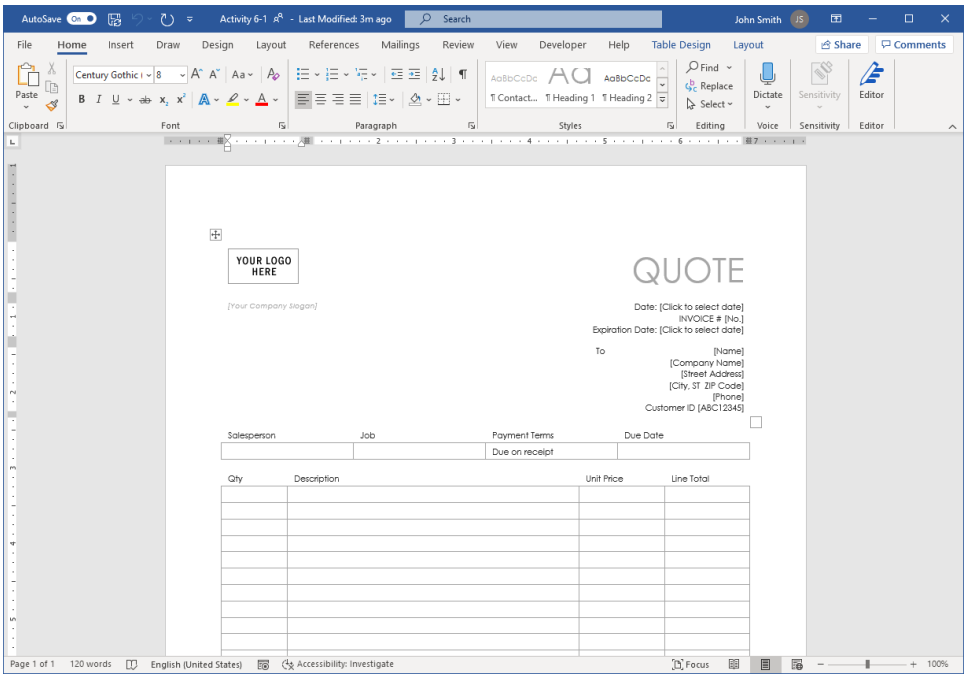
3. Browse to the Lesson 6 folder of your Exercise Files. Select **Activity 6-1** and click **Open**:



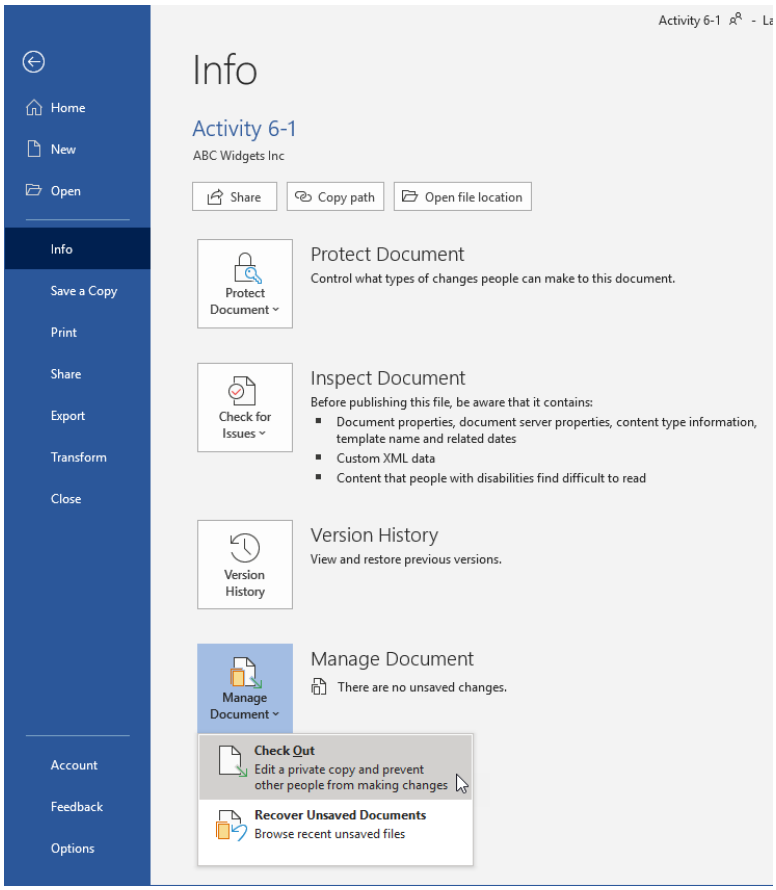
4. Now, let us test the document out. Right-click it and click "**Open → Open in app**:"



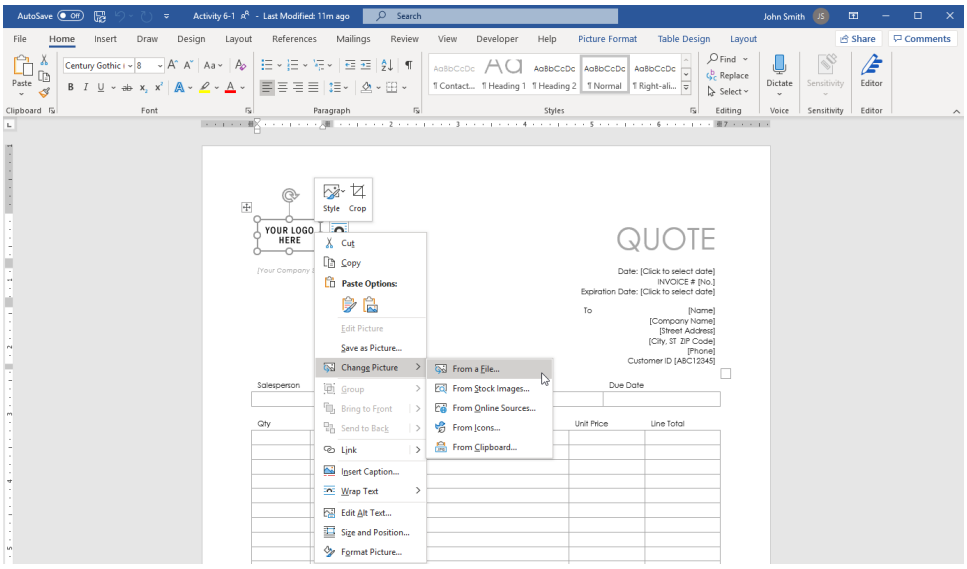
5. The document will open in Microsoft 365 Word:



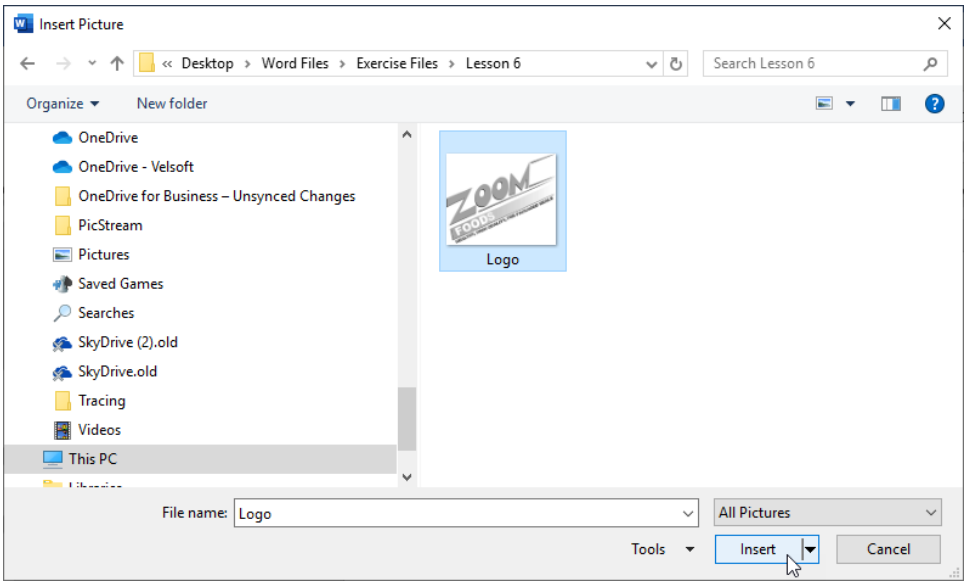
6. We need to add a logo to this document. First, let us check it out. To do this, click **File → Info → Manage Document → Check Out**:



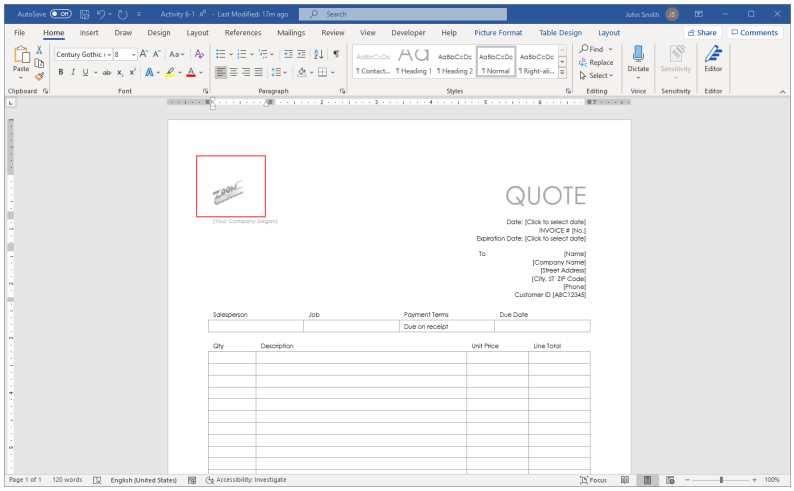
7. Now, right-click the Logo placeholder in the document and click **Change Picture → From a file**:



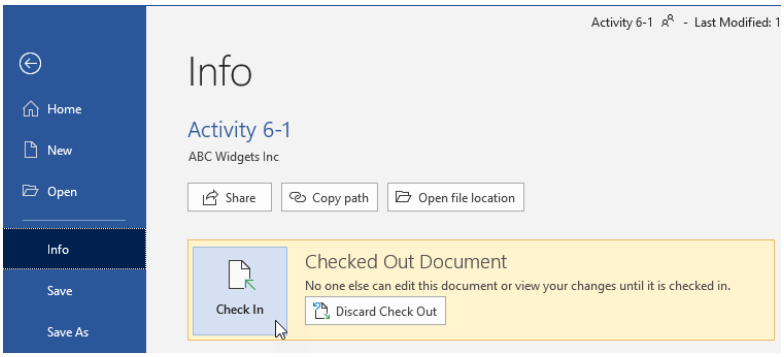
8. Use the Insert Picture dialog box to open the Lesson 6 sub-folder of your Exercise Files folder. Select the **Logo** file and click **Insert**:



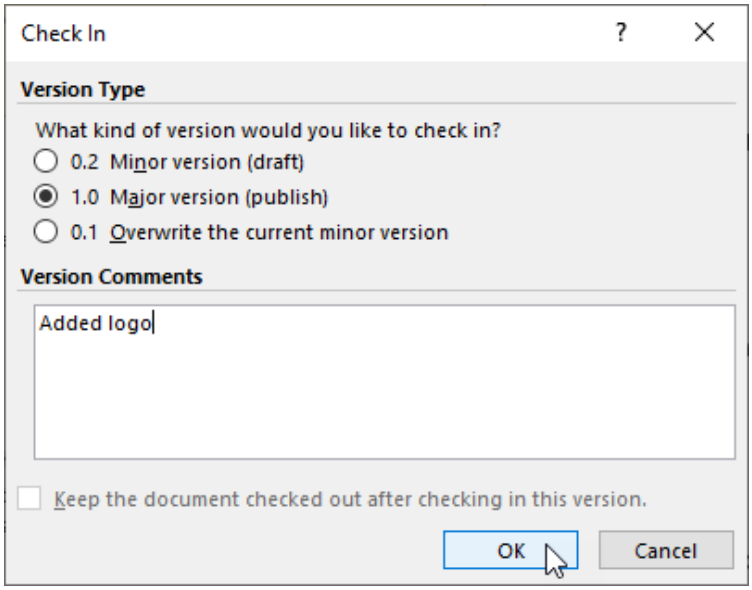
9. The logo will be inserted:



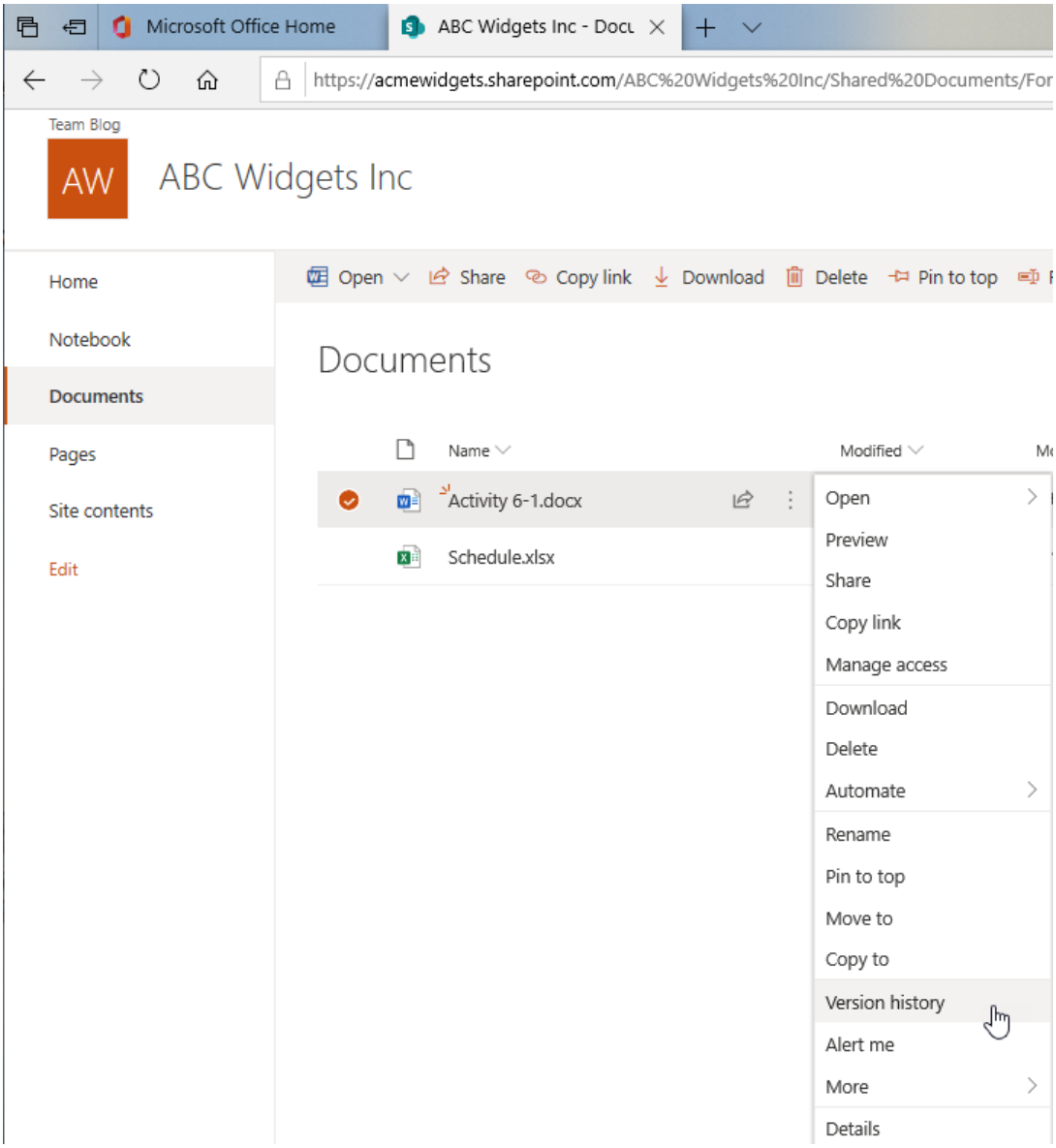
10. Now, let us check the document back in. Click **File → Info → Check In**:



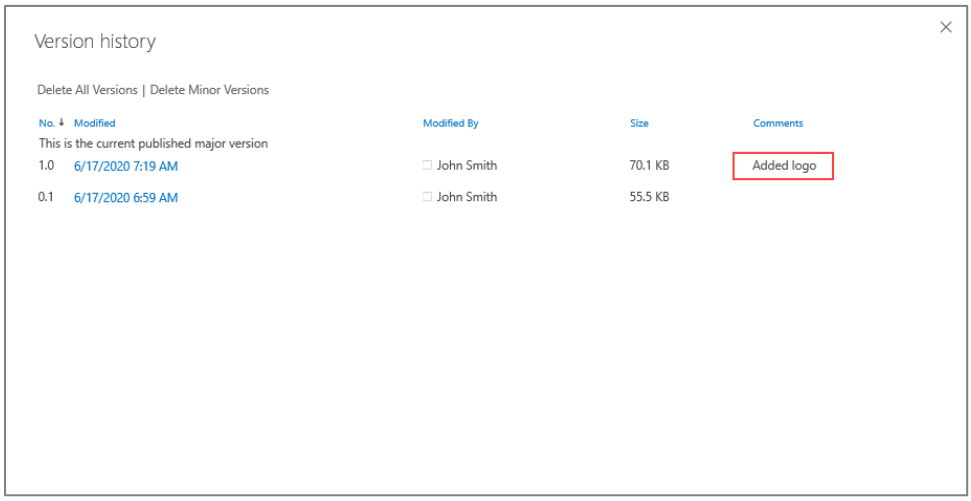
11. The Check In dialog box will open. Select "**Major version**" from the Version Type list. Type, "**Added logo**" for the Version Comments. Click **OK**:



12. 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:



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

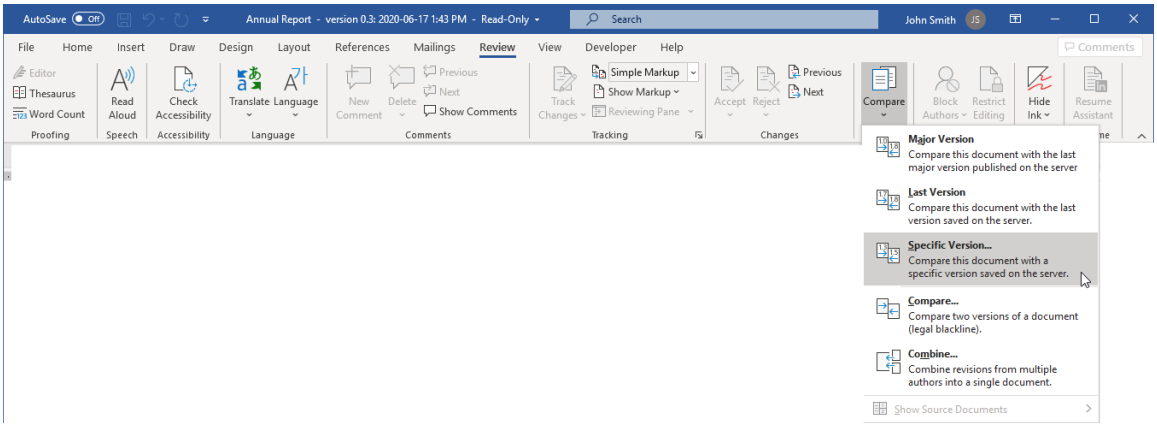
The Compare Feature

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

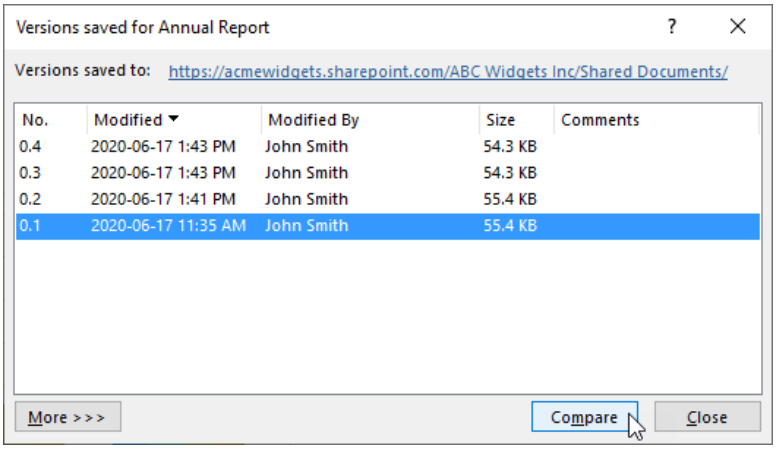
options to access various versions of a document. Of course, this only works as long as the feature has been enabled and if multiple versions of the file exist on the server.

Compare Document Versions

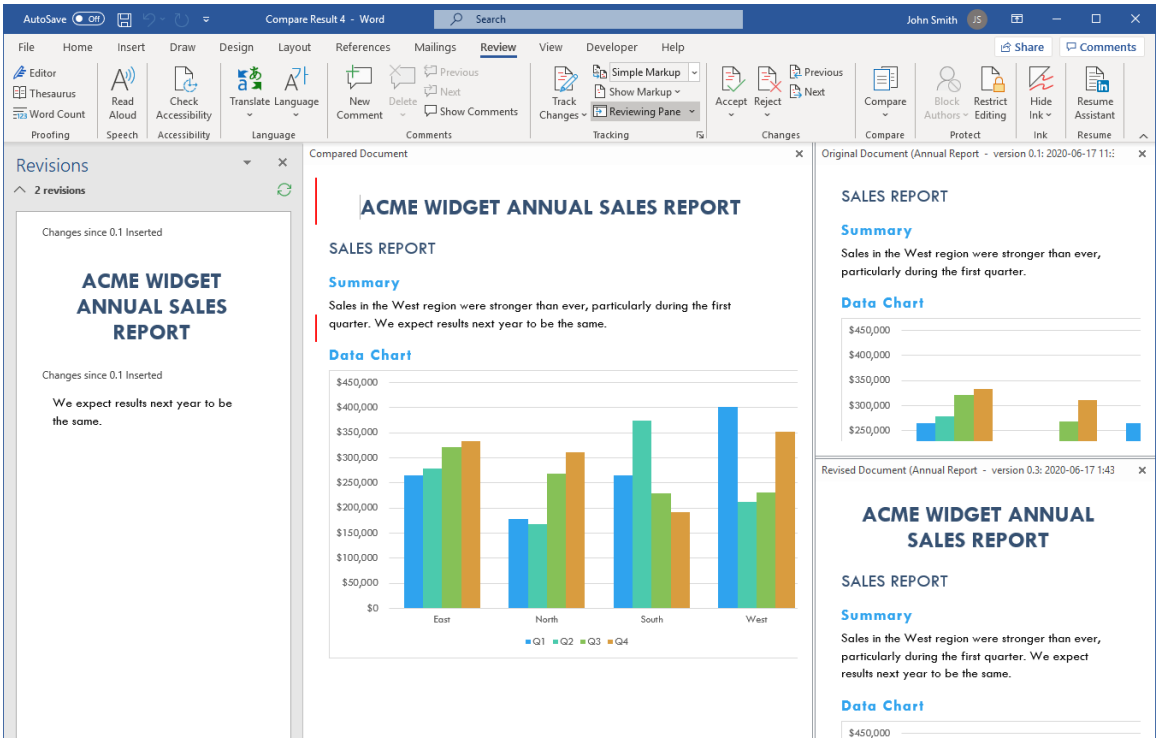
To compare a Microsoft Word document stored on a SharePoint server to other versions of that document, first check the document out and open it in Microsoft Word. Then, click **Review → Compare** and choose the version that you want to compare the document with:



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**.



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

File Management	**Open a new document**	Ctrl + N
	Save a file	Ctrl + S
	Open a file	Ctrl + O
	Print document	Ctrl + P
	Close Microsoft Word	Alt + F4
Text Editing	**Select all**	Ctrl + A
	Copy text	Ctrl + C
	Cut text	Ctrl + X
	Paste text	Ctrl + V
	Toggle Format Painter on	Ctrl + Shift + C
	Undo last action	Ctrl + Z
	Redo last action	Ctrl + Y
	Get help	F1
	Check spelling	F7
Text Formatting Tools	**Apply bold formatting**	Ctrl + B
	Apply underlining	Ctrl + U
	Apply italic formatting	Ctrl + I
	Align text to center	Ctrl + E
	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
Outline View	**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
	Move selected paragraphs up or down	Alt + Shift + Up Arrow/Down Arrow
	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	Alt + Shift + Heading #
References	**Mark a table of contents entry**	Alt + Shift + O
	Mark a citation	Alt + Shift + I
	Mark an index entry	Alt + Shift + X
	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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