

Microsoft Office 2016 Word 2016: Part 2

Student Manual

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Microsoft[®] Office Word[®] 2016: Part 2

Contents

About This Course	
Course Prerequisites	
Course Overview	
Course Objectives	
How To Use This Book	
Lesson 1: Working with Tables and Charts	
TOPIC A: Sort Table Data	4
Sorting Tables	4
Activity 1-1	
TOPIC B: Control Cell Layout	9
Cell Merging	9
Cell Splitting	
Cell Alignment	
Text Direction	
Activity 1-2	
TOPIC C: Perform Calculations in a Table	16
Formulas in Word	
Functions in Word	
Equations	
Activity 1-3	
TOPIC D: Create a Chart	27
Charts	
Chart Components	
Types of Charts	
Creating a Chart	
The Chart Tools Tabs	
Chart Quick Analysis Buttons	
Changing the Chart Type	
Editing Chart Data	
Saving a Chart as a Template	
The Caption Dialog Box	
Activity 1-4	
Summary	
Review Questions	
Lesson 2: Customizing Formats Using Styles and Theme	s 47
TOPIC A: Create and Modify Text Styles	48

Applying Styles	
Character Spacing	
Custom Styles	
The Create New Style from Formatting Dialog Box	
Style Modification Options	
Assigning Keyboard Shortcuts to Styles	
Activity 2-1	
TOPIC B: Create Custom List or Table Styles	73
Tools for List Styles	
Tools for Table Styles	
Activity 2-2	
TOPIC C: Apply and Customize Document Themes	
Applying Document Themes	
Chanaina the Style Set	88
Creating Custom Style Sets	29 89
The Document Formatting Group	91
Creating Custom Color Schemes	92
Creating Custom Eart Schemes	عرد
Saving Custom Themes	+ر ۵۵
Activity 2-2	00
Activity 2-5	104
Summary	
sson 3: Using Images in a Document	
sson 3: Using Images in a Document TOPIC A: Resize an Image	
sson 3: Using Images in a Document TOPIC A: Resize an Image Resizing Options	
sson 3: Using Images in a Document TOPIC A: Resize an Image Resizing Options Cropping Images	
sson 3: Using Images in a Document TOPIC A: Resize an Image Resizing Options Cropping Images Activity 3-1	105 106 106 108 109
SSON 3: Using Images in a Document TOPIC A: Resize an Image Resizing Options Cropping Images Activity 3-1 TOPIC B: Adjust Image Appearance	105 106 106 108 108 109 113
sson 3: Using Images in a Document TOPIC A: Resize an Image Resizing Options Cropping Images Activity 3-1 TOPIC B: Adjust Image Appearance The Adjust Group	105 106 106 108 109 113 113
sson 3: Using Images in a Document TOPIC A: Resize an Image Resizing Options Cropping Images Activity 3-1 TOPIC B: Adjust Image Appearance The Adjust Group Corrections Options	105 106 106 108 109 109 113 113 113
sson 3: Using Images in a Document TOPIC A: Resize an Image Resizing Options Cropping Images Activity 3-1 TOPIC B: Adjust Image Appearance The Adjust Group Corrections Options Color Options	105 106 106 108 109 109 113 113 113 115
sson 3: Using Images in a Document TOPIC A: Resize an Image Resizing Options Cropping Images Activity 3-1 TOPIC B: Adjust Image Appearance The Adjust Group Corrections Options Color Options Artistic Effects Options	105 106 106 108 109 113 113 113 115 116 119
sson 3: Using Images in a Document TOPIC A: Resize an Image Resizing Options Cropping Images Activity 3-1 TOPIC B: Adjust Image Appearance The Adjust Group Corrections Options Color Options Artistic Effects Options Compression Tools	105 106 106 108 109 113 113 113 115 116 119 120
sson 3: Using Images in a Document TOPIC A: Resize an Image Resizing Options Cropping Images Activity 3-1 TOPIC B: Adjust Image Appearance The Adjust Group Corrections Options Color Options Artistic Effects Options Compression Tools The Background Removal Tool	105 106 106 108 109 113 113 115 116 119 120 121
sson 3: Using Images in a Document TOPIC A: Resize an Image Resizing Options Cropping Images Activity 3-1 TOPIC B: Adjust Image Appearance The Adjust Group Corrections Options Color Options Artistic Effects Options Compression Tools The Background Removal Tool Applying Picture Styles	105 106 106 108 109 113 113 113 115 116 119 120 121
sson 3: Using Images in a Document TOPIC A: Resize an Image Resizing Options Cropping Images Activity 3-1 TOPIC B: Adjust Image Appearance The Adjust Group Corrections Options Color Options Artistic Effects Options Compression Tools The Background Removal Tool Applying Picture Styles Activity 3-2	105 106 106 108 109 113 113 113 115 116 116 119 120 121 122
sson 3: Using Images in a Document TOPIC A: Resize an Image Resizing Options Cropping Images Activity 3-1 TOPIC B: Adjust Image Appearance. The Adjust Group. Corrections Options Color Options. Artistic Effects Options Compression Tools The Background Removal Tool. Applying Picture Styles Activity 3-2 TOPIC C: Integrate Pictures and Text	105 106 106 108 109 113 113 113 115 116 119 120 121 122 123 130
sson 3: Using Images in a Document TOPIC A: Resize an Image Resizing Options Cropping Images Activity 3-1 TOPIC B: Adjust Image Appearance The Adjust Group Corrections Options Color Options Artistic Effects Options Compression Tools The Background Removal Tool Applying Picture Styles Activity 3-2 TOPIC C: Integrate Pictures and Text Text Wranning Styles	105 106 106 108 109 109 113 113 113 115 116 119 120 121 122 123 130 130 130 130
sson 3: Using Images in a Document TOPIC A: Resize an Image Resizing Options Cropping Images Activity 3-1 TOPIC B: Adjust Image Appearance The Adjust Group Corrections Options Color Options Artistic Effects Options Compression Tools The Background Removal Tool Applying Picture Styles Activity 3-2 TOPIC C: Integrate Pictures and Text Text Wrapping Styles Picture Positioning Options	105 106 106 108 109 113 113 115 116 119 120 121 122 123 130 130 130 133
sson 3: Using Images in a Document TOPIC A: Resize an Image Resizing Options Cropping Images Activity 3-1 TOPIC B: Adjust Image Appearance The Adjust Group Corrections Options Color Options Artistic Effects Options Compression Tools The Background Removal Tool Applying Picture Styles Activity 3-2 TOPIC C: Integrate Pictures and Text Text Wrapping Styles Picture Positioning Options Botating Images	105 106 106 108 109 113 113 115 116 116 119 120 121 122 123 130 130 133 136
sson 3: Using Images in a Document TOPIC A: Resize an Image Resizing Options Cropping Images Activity 3-1 TOPIC B: Adjust Image Appearance The Adjust Group Corrections Options Color Options Color Options Artistic Effects Options Compression Tools The Background Removal Tool Applying Picture Styles Activity 3-2 TOPIC C: Integrate Pictures and Text Text Wrapping Styles Picture Positioning Options Rotating Images Adding Cantions	105 106 106 108 109 109 113 113 115 116 116 119 120 121 122 123 130 130 133 136 138
sson 3: Using Images in a Document TOPIC A: Resize an Image Resizing Options Cropping Images Activity 3-1 TOPIC B: Adjust Image Appearance. The Adjust Group Corrections Options Color Options Artistic Effects Options Compression Tools The Background Removal Tool Applying Picture Styles Activity 3-2 TOPIC C: Integrate Pictures and Text. Text Wrapping Styles Picture Positioning Options Rotating Images Adding Captions Activity 3-3	105 106 106 108 109 109 113 113 115 116 116 119 120 121 122 123 130 130 133 136 138 138
sson 3: Using Images in a Document TOPIC A: Resize an Image Resizing Options Cropping Images Activity 3-1 TOPIC B: Adjust Image Appearance. The Adjust Group Corrections Options Color Options. Artistic Effects Options Compression Tools The Background Removal Tool. Applying Picture Styles Activity 3-2 TOPIC C: Integrate Pictures and Text. Text Wrapping Styles. Picture Positioning Options Rotating Images Adding Captions Activity 3-3 TOPIC D: Insert and Format Screenshots	105 106 106 108 109 109 113 113 113 115 116 119 120 120 121 122 123 130 130 133 136 138 138 139 144
sson 3: Using Images in a Document. TOPIC A: Resize an Image Resizing Options Cropping Images Activity 3-1 TOPIC B: Adjust Image Appearance The Adjust Group Corrections Options Color Options Color Options Artistic Effects Options Compression Tools The Background Removal Tool Applying Picture Styles Activity 3-2 TOPIC C: Integrate Pictures and Text Text Wrapping Styles Picture Positioning Options Rotating Images Adding Captions Activity 3-3	105 106 106 108 109 109 113 113 113 115 116 119 120 120 121 122 123 130 130 130 133 136 138 139 144
sson 3: Using Images in a Document TOPIC A: Resize an Image Resizing Options Cropping Images Activity 3-1 TOPIC B: Adjust Image Appearance The Adjust Group Corrections Options Color Options Artistic Effects Options Compression Tools The Background Removal Tool Applying Picture Styles Activity 3-2 TOPIC C: Integrate Pictures and Text Text Wrapping Styles Picture Positioning Options Rotating Images Adding Captions Activity 3-3 TOPIC D: Insert and Format Screenshots The Screenshot Tool	105 106 106 108 109 109 113 113 113 115 116 116 119 120 121 122 123 130 130 130 133 136 138 139 144
Sson 3: Using Images in a Document. TOPIC A: Resize an Image Resizing Options Cropping Images Activity 3-1 TOPIC B: Adjust Image Appearance The Adjust Group. Corrections Options. Color Options. Color Options. Artistic Effects Options Compression Tools The Background Removal Tool. Applying Picture Styles. Activity 3-2 TOPIC C: Integrate Pictures and Text. Text Wrapping Styles. Picture Positioning Options. Rotating Images. Adding Captions Activity 3-3 TOPIC D: Insert and Format Screenshots The Screenshot Tool Activity 3-4	105 106 106 108 109 109 113 113 113 115 116 116 119 120 121 122 123 130 130 130 133 136 138 139 144 144
sson 3: Using Images in a Document. TOPIC A: Resize an Image Resizing Options Cropping Images Activity 3-1 TOPIC B: Adjust Image Appearance The Adjust Group Corrections Options Color Options. Artistic Effects Options Compression Tools The Background Removal Tool Applying Picture Styles Activity 3-2 TOPIC C: Integrate Pictures and Text Text Wrapping Styles Picture Positioning Options Rotating Images Adding Captions Activity 3-3 TOPIC D: Insert and Format Screenshots The Screenshot Tool Activity 3-4	105 106 106 108 109 109 113 113 113 115 116 116 119 120 121 122 123 130 130 130 130 130 131 136 138 139 144 144 144 144
sson 3: Using Images in a Document. TOPIC A: Resize an Image Resizing Options Cropping Images Activity 3-1 TOPIC B: Adjust Image Appearance The Adjust Group Corrections Options Color Options Artistic Effects Options Compression Tools The Background Removal Tool Applying Picture Styles Activity 3-2 TOPIC C: Integrate Pictures and Text Text Wrapping Styles Picture Positioning Options Rotating Images Adding Captions Activity 3-3 TOPIC D: Insert and Format Screenshots The Screenshot Tool Activity 3-4 Summary Review Questions	105 106 106 108 109 113 113 113 113 115 116 119 120 121 122 123 130 130 133 136 138 139 144 144 144 144 144 144
sson 3: Using Images in a Document TOPIC A: Resize an Image Resizing Options Cropping Images Activity 3-1 TOPIC B: Adjust Image Appearance The Adjust Group Corrections Options Color Options Artistic Effects Options Compression Tools The Background Removal Tool Applying Picture Styles Activity 3-2 TOPIC C: Integrate Pictures and Text Text Wrapping Styles Picture Positioning Options Rotating Images Adding Captions Activity 3-3 TOPIC D: Insert and Format Screenshots The Screenshot Tool Activity 3-4 Summary Review Questions	

TOPIC A: Create Text Boxes and Pull Quotes	
Types of Text Boxes	
Inserting a Text Box with the Text Box Gallery	
Drawing a Text Box	154
The Drawing Tools – Format Contextual Tab	
Applying Text Box Styles	
Formatting Text Boxes	156
Applying Shadow and 3-D Effects	
Changing Text Direction	
Saving the Selection to the Text Box Gallery	
Arranging Text Boxes	
Activity 4-1	
TOPIC B: Draw Shapes	
Shapes in Word	
Types of Shapes	
The Drawing Canvas	
Text Wrapping Styles	
Adding Text to a Shape	
Modifying Text in a Shape	
Adding Captions	
Setting Shape Styles	
Resizing Options	
Positioning Options	
Activity 4-2	
TOPIC C: Add WordArt and Other Text Effects	
WordArt	
Drop Caps	
Activity 4-3	
TOPIC D: Create Complex Illustrations with SmartArt	
SmartArt Graphics	
The Choose a SmartArt Graphic Dialog Box	
Adding Text and Images to the Diagram	
SmartArt Graphic Categories	
The SmartArt Tools Contextual Tabs	
Activity 4-4	
Summary	
Review Questions	
Lasson F. Incorting Contact Using Quick Parts	303
Lesson 5. Inserting Content Osing Quick Purts	
TOPIC A: Insert Building Blocks	
Quick Parts	
Building Blocks	
The Building Blocks Organizer Dialog Box	
Activity 5-1	
TOPIC B: Create and Modify Building Blocks	212
The Create New Building Blocks Dialog Box	
Building Block Modification Options	
Copying Building Blocks Between Documents	216
Activity 5-2	216
TOPIC C: Insert Fields Using Quick Parts	
Fields	

Field Code Syntax	
The Field Dialog Box	
Activity 5-3	
Summary	
Review Questions	
Lesson 6: Controlling Text Flow	229
TOPIC A: Control Paragraph Flow	230
Paragraph Flow Options	230
Activity 6-1	232
TOPIC B: Insert Section Breaks	240
Sections and Section Breaks	
When to Use Section Breaks	
Inserting a Section Break	241
Types of Section Breaks	
Creating Section Titles	
Activity 6-2	
TOPIC C: Insert Columns	250
Text Columns	
Text Column Options	
Activity 6-3	
TOPIC D: Link Text Boxes to Control Text Flow	
Linked Text Boxes	
Inserting Text from a File	
Activity 6-4	
Summary	
Review Questions	265
Review Questions Lesson 7: Using Templates	
Review Questions Lesson 7: Using Templates TOPIC A: Create a Document Using a Template	
Review Questions Lesson 7: Using Templates TOPIC A: Create a Document Using a Template Templates in Word	
Review Questions Lesson 7: Using Templates TOPIC A: Create a Document Using a Template Templates in Word Creating a Document from a Template	
Review Questions	265
Review Questions	265 267 268 268 268 269 272 273
Review Questions	265 267 268 268 268 269 272 273 273
Review Questions Lesson 7: Using Templates TOPIC A: Create a Document Using a Template Templates in Word Creating a Document from a Template Viewing Personal Templates Template Storage Locations Activity 7-1 TOPIC B: Create a Template	265 267 268 268 268 269 272 273 273 273 273 273
Review Questions	265
Review Questions	265
Review Questions	265 267 268 268 269 272 273 273 273 273 273 280 280 284 284
Review Questions	265 267 268 268 268 269 272 273 273 273 273 273 273 280 280 280 284 286 288
Review Questions	265
Review Questions	265
Review Questions	265 267 268 268 268 269 272 273 273 273 280 280 280 280 284 286 288 292 292 301
Review Questions	265
Review Questions	265 267 268 268 268 269 272 273 273 273 280 280 280 280 284 286 288 292 292 301 301 301
Review Questions	265 267 268 268 268 269 272 273 273 273 273 280 280 280 284 286 288 292 292 301 301 301 301 303
Review Questions	265 267 268 268 269 272 273 273 273 280 280 280 280 280 280 280 280
Review Questions	265 267 268 268 268 269 272 273 273 280 280 280 280 280 280 280 280

Data Sources	
The Mail Merge Process	
The Mailings Tab	
The Mail Merge Wizard and Related Dialog Boxes	
Opening a Mail Merge Document with a Data Source Attached	
Unlinking a Data Source	
Activity 8-1	
TOPIC B: Merge Envelopes and Labels	
Merge Options for Envelopes and Labels	
Creating a Single Envelope or Label	
Set Up a Return Address	
Activity 8-2	
TOPIC C: Create a Data Source Using Word	
Data Sources	
Data Guidelines	
Creating a Data Source Using Word	
Activity 8-3	
Summary	
Review Questions	
Answer Keys	
Lesson 1 Review Questions	
Lesson 2 Review Questions	
Lesson 3 Review Questions	
Lesson 4 Review Questions	
Lesson 5 Review Questions	
Lesson 6 Review Questions	
Lesson 7 Review Questions	
Lesson 8 Review Questions	
Appendices	363
Keyboard Shortcut Quick Reference Sheet	363
Glossory	
Inaex	

ABOUT THIS COURSE

COURSE PREREQUISITES

This manual assumes that the user has 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
- Inserting tables and graphical objects
- Controlling paragraph and page layout using the tools on the Home tab, Layout tab, and Page Setup dialog
- Proofing a document for errors
- Customizing the Microsoft Word environment

COURSE OVERVIEW

This intermediate-level course is designed to help users who are familiar with Word's basic features take their skills to the next level.

COURSE OBJECTIVES

By the end of this course, users should be comfortable with using tools like styles, macros, templates, mail merge, and building blocks to automate tasks. Students will also understand how to create complex documents using tables, charts, and various types of illustrations.

How To Use This Book

This course is broken up into nine 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.

LESSON 1: WORKING WITH TABLES AND CHARTS

Lesson Objectives

In this lesson you will learn how to:

- Sort table data
- Control cell layout
- Perform calculations in a table
- Create a chart

TOPIC A: Sort Table Data

Although Microsoft Word is primarily designed for word processing, it does provide tools for managing table-based data. One key tool is the ability to sort data in different ways.

Topic Objectives

In this topic, you will learn:

How to sort tables

SORTING TABLES

The Sort command on the Table Tools – Layout tab is an excellent tool for arranging data in any way that you want. As an example, take a look at this table:

Region	Week 1	Week 2	Week 3
East	\$78,664	\$63,819	\$65,235
North	\$62,356	\$70,176	\$68,871
West	\$66,195	\$71,953	\$67,482
South	\$67,504	\$62,945	\$72,894

Currently, the areas appear in the order that they were entered. If we wanted to sort the areas alphabetically, we could place our cursor in that column (or select the appropriate data) and click the Sort command on the Table Tools – Layout tab:

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B		7			• •		H H		👔 🛛 Heigl	ht: 0.2" 🗘 🗄 Distribute Rows		2 ↓ 🖻	fx	
Select	View Properties Gridlines	Draw Eraser Table	Delete	Insert Insert Above Below	Insert Insert Left Right	Merge Cells	Split Spli Cells Tabl	t AutoFit le *	🛺 Widtl	1: Distribute Columns	Text Cell	Sort Repeat	Convert Formula to Text	
	Table	Draw		Rows & Column	s līs		Merge			Cell Size 12	Alignment	Data	, i e	~

Now, we can choose how we want to sort the data:

Sort				?	×
Sort by					
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	Using:	Paragraphs	\sim	O Desce <u>r</u>	nding
Then <u>b</u> y					
\sim	Type:	Text	\sim	Ascent	ding
	Using:	Paragraphs	\sim	O Descer	nding
My list has					
● Header <u>r</u> ow ○ No heade	r ro <u>w</u>				
Options		E	ОК	Cano	el

These settings are the default; they will sort the first column (labeled Region in this example) by its text in ascending (A-Z order), excluding the header row.

Here is the result after clicking OK:

Region	Week 1	Week 2	Week 3
East	\$78,664	\$63,819	\$65,235
North	\$62,356	\$70,176	\$68,871
South	\$67,504	\$62,945	\$72,894
West	\$66,195	\$71,953	\$67,482

ACTIVITY 1-1 Sorting Table Data

In this activity, you will sort data in a sales report.

1. Open Microsoft Word 2016 and open Activity 1-1:



2. Select the first column of the table:

8 5 0 ×				Activity 1-1 - Word					1	œ.	- 0	×
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App1ell 77week (2)	Suns Ann 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9	hine Ti Jal Re \$114,752 \$128,058 \$139,158 \$170,773 \$194,789 \$230,743 \$246,707 \$247,578	x America \$97,876 \$125,065 \$151,642 \$222,247 \$136,963 \$191,430 \$174,103 \$156,642	Carlbbean 5229,292 \$203,929 \$196,386 \$174,036 \$174,036 \$174,036 \$174,036 \$165,362 \$83,709	Europe \$167,120 \$166,893 \$191,292 \$174,952 \$118,295 \$96,240 \$177,158 \$223,227	Asia \$48,512 \$195,827 \$139,779 \$79,586 \$110,586 \$216,034 \$175,413	Australia/N2 \$92,396 \$209,901 \$100,852 \$131,81,86 \$170,378 \$131,170 \$152,258 \$185,637				4 4	120%

3. Click Table Tools – Layout \rightarrow Sort:

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Select v	View Properties Gridlines	Draw Eraser Table	Delete	Insert Insert Above Below	Insert Insert Left Right	Merge Spli Cells Cell	t Split s Table	AutoFit v	Widtle	я 0.81° 🗘	🔛 Distribute Columns		Text Cell Direction Margins	Sort	Repeat Header Row	Conver to Text
	Table	Draw		Rows & Column	ns lā	Merc	e .			Cell Size	5	Alii	anment	00.	Daf	a

4. Ensure that "(Column 1)" is displayed in the "Sort by" menu. Click the Type menu and choose Date:

Sort				? ×
Sort by				
(Column 1) 🗸 🗸	Type:	Text	~	Ascending
	Using:	Text Number	^	O <u>D</u> escending
<u>T</u> hen by		Date	2	
✓	Ty <u>p</u> e:		~~~ v	• As <u>c</u> ending
	Using:	Paragraphs	\sim	O Descending
Then <u>b</u> y				
\sim	Type:	Text	\sim	Ascending
	Using:	Paragraphs	\sim	 Descending
My list has				
● Header <u>r</u> ow ○ No heade	er ro <u>w</u>			
Options			OK	Cancel

5. Ensure that the "Header row" radio button is selected:

Sort			?	×
Sort by				
(Column 1) 🗸	Type:	Date 🗸 🗸	● <u>A</u> sce	ending
	Using:	Paragraphs 🗸	○ <u>D</u> es	cending
<u>T</u> hen by				
~	Ty <u>p</u> e:	Text 🗸	• As <u>c</u> e	ending
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Then <u>b</u> y				
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	Using:	Paragraphs 🗸	O Des	cending
My list has				
Reader <u>r</u> ow O No head	er ro <u>w</u>			
Options		ОК	Ca	incel

6. Click OK to perform the sort:

Sort				?	×
Sort by					
(Column 1) 🗸 🗸	Тұре:	Date	~	<u>A</u> scence	ding
	Using:	Paragraphs	\sim	O <u>D</u> escer	nding
<u>T</u> hen by					
~	Type:	Text	\sim	• As <u>c</u> enc	ding
	Using:	Paragraphs	\sim	O Desce <u>r</u>	nding
Then <u>b</u> y					
\sim	Type:	Text	\sim	Ascence	ding
	Using:	Paragraphs	\sim	 Descer 	nding
My list has					
● Header <u>r</u> ow ○ No heade	er ro <u>w</u>				
Options			ок 🖓	Cano	el

7. The data will now be sorted in chronological order:

+						
	N. America	S. America	Caribbean	Europe	Asia	Australia/NZ
Q1 2020	\$139,158	\$151,642	\$196,386	\$191,292	\$157,967	\$100,852
Q2 2020	\$128,058	\$125,065	\$203,929	\$166,893	\$195,829	\$209,901
Q3 2020	\$246,707	\$174,103	\$165,362	\$177,158	\$216,034	\$152,258
Q4 2020	\$247,578	\$156,642	\$83,709	\$223,227	\$175,413	\$185,637
Q1 2021	\$170,773	\$222,247	\$174,036	\$174,952	\$139,779	\$168,186
Q2 2021	\$114,752	\$97,876	\$229,292	\$167,120	\$68,512	\$92,396
Q3 2021	\$230,743	\$191,430	\$176,708	\$96,240	\$110,586	\$131,170
Q4 2021	\$194,789	\$136,963	\$204,989	\$118,295	\$79,586	\$170,378
Q2 2021 Q3 2021 Q4 2021	\$114,752 \$230,743 \$194,789	\$97,876 \$191,430 \$136,963	\$229,292 \$176,708 \$204,989	\$167,120 \$96,240 \$118,295	\$68,512 \$110,586 \$79,586	\$92,396 \$131,170 \$170,378

8. Save your document as Activity 1-1 Complete. Close Microsoft Word 2016 to complete this activity.

TOPIC B: Control Cell Layout

Microsoft Word offers many tools to help you format and customize tables. In this topic, you will learn about the basic ways to merge and split cells, change their alignment, and change the direction of text.

Topic Objectives

In this topic, you will learn:

- How to merge and split cells
- How to change cell alignment
- How to change the direction of text in a cell

CELL MERGING

There may be times when you want to merge a group of cells into one (for example, to create a table title). To do this, select the cells that you would like to merge and click Merge Cells on the Table Tools – Layout tab or on the right-click menu:

B 5.0		Sales Rep	ort - Word		1	Table Tools					æ	-	o x	
File Home Inse	ert Design Li	yout References	Mailings	Review View	Desig	gn Layout						Sign in	A Share	
Select - Gridlines Table	Draw Eraser Draw Draw	elete - Above Below Rows & Colum	Insert Insert Left Right ns ra	Merge Cells Merge	Split Au Table	toFit Widt	ht: 0.2" : ht: : Cell Size	Distribute Rows	Text Cell	Sort Re Head	epeat C ler Rows t Data	Convert Fo to Text	fx emuls	~
		Sales 	Repo	ort	a B	alibri - 1 B I 🗮 😤 -	1 - A* A* ▲ - 盐 - ⊞	 Insert Delete 						
		Region	Week 1	Week 2	W	6 Cur								
		East	\$78,664	\$63,819	\$6	Paste Ootio	16							
		North	\$62,356	\$70,176	\$6	-								
		South	\$67,504	\$62,945	\$7									
		West	\$66,195	\$71,953	\$6	Delete Cells	÷ .							
					開催な	Merge Cells Border Styles Test Directio Table Proper New Comma	> ties nt							

The cells will now be merged together to form one cell:

_			
Region	Week 1	Week 2	Week 3
East	\$78,664	\$63,819	\$65,235
North	\$62,356	\$70,176	\$68,871
South	\$67,504	\$62,945	\$72,894
West	\$66,195	\$71,953	\$67,482

CELL SPLITTING

To split a cell, select the cell and then click the Split Cells command on the right-click menu or the Table Tools – Layout tab:

🗄 🐬 🔿		Sales Rep	ort - Word			
File Home I	nsert Design	Layout References	Mailings	Review View	ign Layout 🗘 Tell me what you want to do	Sign in 🔉 Share
Select View Propertie Gridlines Table	es Draw Eraser Table Draw	Delete - Above Below Rows & Colum	Insert Insert Left Right	Merge Cells Merge	Image: Second	Text Cell Direction Margins Ignment Cell Sort Repeat Convert Formula Header Rows to Text
		Sales	Repo	ort	$\vec{n} = 1 + \vec{h} \cdot \vec{h} \cdot \vec{v} \text{invert Determ}$ $I = 2 + n \cdot 2 + n$	
		Perion	Week 1	Week 2	Cut	
		Fast	\$78 664	\$63.819	Copy	
		North	\$62,356	\$70,176	Paste Options:	
		South	\$67,504	\$62,945		
		West	\$66,195	\$71,953	Insert +	
					Delete Kows	
					Dender Chiler	
					Test Direction	
					Table Properties	
					New Comment	

Then, Word will ask you for the configuration of the split. Enter the desired dimensions and click OK:

Split Cells	?	×
Number of <u>c</u> olumns: Number of <u>r</u> ows:	4 1	4
Merge cells before	split	
ОК	Cance	el

The split will then be performed.

CELL ALIGNMENT

To align a table, select it and use one of the alignment commands in the Paragraph group on the Home tab:

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Paste	Cut Copy Format F	Painter	Calibri B <i>I</i> <u>U</u> ≁	* 11 * /	A° A° Aa - ∧ - <u>*</u> -	◆ E -] ▲ - ■ ■	= + '== + == = ‡1 ∂	== == ⊪ + <u>∆</u> -	21 ¶ •⊞ •	AaBbCcDr 1 Normal	AaBbCcDr 1 No Spac	AaBbC(Heading 1	AaBbCcE Heading 2	AaB Title	AaBbCcE Subtitle	AaBbCcDe Subtle Em	AaBbCcDr Emphasis		Find Find Find Find Find Find Find Find		
				C) III	Sales	Rep	ort														
					Region	Week 1	Wee	ek 2	Week	3											
					East	\$78,664	\$63	3,819	\$65,23	85											
					North	\$62,356	5 \$70	0,176	\$68,87	/1											
					South	\$67,504	\$63	2,945	\$72,89	94											
				3	West	\$66,195	5 \$7:	1,953	\$67,48	32											

You can also adjust the horizontal alignment of individual cells by selecting them and using these commands.

To change both the horizontal and vertical alignment of a cell, use the commands in the Alignment group of the Table Tools – Layout tab:

					Sal	es Report - Wor											1 –		
	Home		Design	Layout	References	Mailings	Review		Developer	Design	Layout						Sign ir	n A Sh	are
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	Table		Draw		Rows & Column	ns Ga		Merge			Cell Size		s A	lignment			Data		~

All of these commands can be used on one or multiple cells.

TEXT DIRECTION

To change the direction of text in a cell, click the Text Direction command on the Table Tools – Layout tab:

	5- C	÷		Sal	les Report - Wor	d			Table Tools			
	Home Ins	ert Design	Layout	References	Mailings	Review	View	Developer	Design Layou	ıt		nt to do
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Select	View Properties Gridlines	Draw Eraser Table	Delete	Insert Insert Above Below	Insert Insert Left Right	Merge Cells	Split Split Cells Table	AutoFit	Width: 0.85"	÷	🛗 Distribute Columns	Text Cell
	Table	Draw		Rows & Column	ns G		Merge		Cell S	ize	5	Alianment 6

This command acts as a toggle, with the image on the button reflecting the current direction of the text:

E	1						Sales Rep	ort - Word												
F	le	Hom	ie Insi	ent (Design	Layout	References	Mailings	Review	View	Design	Layout	🖓 Tell me w	hat you want to do				Sign in	β , s	hare
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							Calac	Don	ort											
							Sales	кер	JIL											
						-1-		Region	We	ek 1	Week 2	Wee	ik 3							
							ARY	East	\$78	3,664	\$63,819	\$65	,235							
							NN	North	\$62	2,356	\$70,176	5 \$68	871							
							L NUS	South	\$67	7,504	\$62,945	5 \$72	,894							
								West	\$66	5,195	\$71,953	3 \$67	482							

ACTIVITY 1-2 Controlling Cell Layout

In this activity, you will perform some additional modifications to the travel sales report.

1. Open Microsoft Word 2016 and open Activity 1-2:



2. Click in the first row of the table to place your cursor there. Click Table Tools – Layout \rightarrow Insert Above:

- E - S - C ² - ∓	Activity 1-2 - Word		Table Tools							-	o x
File Home Insert Design	Layout References Mailing	s Review View	Design Layout	Q Tell me what y	you want to do					Sign in	A Share
Select View Properties GridInes Table Draw	Delete Above Below Left Rig Rows Columns	ert Merge Split S ght Cells Cells T 5 Merge	plit AutoFit www.	ight: 0.15" CEL idth: 0.81" CEL CELSIZE	Distribute Rows		Text Cell irection Margins nment	Sort Repeat Header Rows Date	Convert Formula to Text		
	The set R-main of the se	N. America \$199,158 \$1247,573 \$170,773 \$170,773 \$170,773 \$170,773 \$170,773 \$194,752 \$230,743	ravel venue \$151,642 \$152,065 \$174,103 \$156,642 \$222,247 \$97,876 \$191,430 \$136,963	Catibbean \$196,386 \$203,929 \$165,382 \$33,709 \$174,036 \$229,2922 \$176,708 \$204,989	Europe \$191,292 \$166,893 \$223,227 \$177,158 \$223,227 \$174,952 \$167,120 \$96,240 \$118,295	Asia \$157,967 \$195,829 \$216,034 \$175,413 \$139,779 \$68,512 \$110,586 \$79,586	Australia/N \$100,852 \$209,901 \$152,258 \$185,637 \$168,186 \$92,396 \$131,170 \$170,378				

3. Select all cells in this new row except the first one:

						I
	N. America	S. America	Caribbean	Europe	Asia	Australia/NZ
Q1 2020	\$139,158	\$151,642	\$196,386	\$191,292	\$157,967	\$100,852
Q2 2020	\$128,058	\$125,065	\$203,929	\$166,893	\$195,829	\$209,901
Q3 2020	\$246,707	\$174,103	\$165,362	\$177,158	\$216,034	\$152,258
Q4 2020	\$247,578	\$156,642	\$83,709	\$223,227	\$175,413	\$185,637
Q1 2021	\$170,773	\$222,247	\$174,036	\$174,952	\$139,779	\$168,186
Q2 2021	\$114,752	\$97,876	\$229,292	\$167,120	\$68,512	\$92,396
Q3 2021	\$230,743	\$191,430	\$176,708	\$96,240	\$110,586	\$131,170
Q4 2021	\$194,789	\$136,963	\$204,989	\$118,295	\$79,586	\$170,378

4. Click Table Tools – Layout \rightarrow Merge Cells:

H	ار ا	ç				Act	tivity 1-	2 - Wor	d							
File	Ho	me	Insert	Design	Layout	Refer	ences	Mai	lings	Review	Vie	w (Design	Layout	♀ Tell me wh	at you want to do
\searrow				1 📫				€	•					1 Height	: 0.15" 🗘	🗄 Distribute Rows
Select +	View Gridlines	Propert	ties Di Ta	raw Eraser ible	Delete *	Insert Above	Insert Below	Insert Left	lnsert Right	Merge Cells	Split Cells	Split Table	AutoFit	🛺 Width:	÷	🛗 Distribute Columns
	Table			Draw		Rows &	Colum	ns	5	L D	Merge				Cell Size	5

5. Type "Summary by Region" in this new cell:

	Summary by	Region				
	N. America	S. America	Caribbean	Europe	Asia	Australia/NZ
Q1 2020	\$139,158	\$151,642	\$196,386	\$191,292	\$157,967	\$100,852
Q2 2020	\$128,058	\$125,065	\$203,929	\$166,893	\$195,829	\$209,901
Q3 2020	\$246,707	\$174,103	\$165,362	\$177,158	\$216,034	\$152,258
Q4 2020	\$247,578	\$156,642	\$83,709	\$223,227	\$175,413	\$185,637
Q1 2021	\$170,773	\$222,247	\$174,036	\$174,952	\$139,779	\$168,186
Q2 2021	\$114,752	\$97,876	\$229,292	\$167,120	\$68,512	\$92,396
Q3 2021	\$230,743	\$191,430	\$176,708	\$96,240	\$110,586	\$131,170
Q4 2021	\$194,789	\$136,963	\$204,989	\$118,295	\$79,586	\$170,378

6. Click the Home tab:

H	ა . ა	÷			Activity 1-	-2 - Word			Table 1	ĩools
File	Home	Insert	Design	Layout	References	Mailings	Review	View	Design	Layout
2			1			€ ₽				🐌 🛛 Height:
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	Table		Draw		Rows & Colum	ns 🗔		Merge		

7. Select the merged cell. Center-align the text:

🖬 र्जन्द म Addivity 1-2	- Word	Table Tools							- (x c
File Home Insert Design Layout References	Mailings Review View	Design Layout	♀ Tell me what y						Sign in	A Share
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	Summary by	Region								
	N. America	S. America	Caribbean	Europe	Asia	Australia/NZ				
Q1	2020 \$139,158	\$151,642	\$196,386	\$191,292	\$157,967	\$100,852				
Q2	2020 \$128,058	\$125,065	\$203,929	\$166,893	\$195,829	\$209,901				
Q3	\$ 2020 \$246,707	\$174,103	\$165,362	\$177,158	\$216,034	\$152,258				
Q4	2020 \$247,578	\$156,642	\$83,709	\$223,227	\$175,413	\$185,637	7			
Q1	2021 \$170,773	\$222,247	\$174,036	\$174,952	\$139,779	\$168,186				
Q2	2021 \$114,752	\$97,876	\$229,292	\$167,120	\$68,512	\$92,396	1			
Q3	\$ 2021 \$230,743	\$191,430	\$176,708	\$96,240	\$110,586	\$131,170	1			
Q4	2021 \$194,789	\$136,963	\$204,989	\$118,295	\$79,586	\$170,378	1			
Page 1 of 1 80 words 🔯		I					-1	III 15 -	1	+ 126%

8. Apply a bold effect and increase the font size to 24:

E 5 C Activity	1-2 - Word	Table Tools							– 🗆 X
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G	21 2020 \$139,158	\$151,642	\$196,386	\$191,292	\$157,967	\$100,852			
G	22 2020 \$128,058	\$125,065	\$203,929	\$166,893	\$195,829	\$209,901			
G	3 2020 \$246,707	\$174,103	\$165,362	\$177,158	\$216,034	\$152,258			
G	4 2020 \$247,578	\$156,642	\$83,709	\$223,227	\$175,413	\$185,637			
G	\$170,773	\$222,247	\$174,036	\$174,952	\$139,779	\$168,186			
G	2 2021 \$114,752	\$97,876	\$229,292	\$167,120	\$68,512	\$92,396			
G	3 2021 \$230,743	\$191,430	\$176,708	\$96,240	\$110,586	\$131,170			
G	24 2021 \$194,789	\$136,963	\$204,989	\$118,295	\$79,586	\$170,378			
Rang 1 of 1 - Museum - 102									4 4 1265

9. Select the two blank cells in the first two rows of this table. Right-click the selection and click Merge Cells:

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÷ B I	≡ ª <u>"</u> • <u>A</u> • ≙ •	Insert Delete								
X C		ary by	y Region							
	opy aste Options:	S. America	Caribbean	Europe	Asia	Australia/NZ				
Q1: 🕤		\$151,642	\$196,386	\$191,292	\$157,967	\$100,852				
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Q3 :	elete Cells	\$174,103	\$165,362	\$177,158	\$216,034	\$152,258				
	order Styles	\$156,642	\$83,709	\$223,227	\$175,413	\$185,637				
Q1 IIA T	e <u>x</u> t Direction	\$222,247	\$174,036	\$174,952	\$139,779	\$168,186				
Q2	able P <u>r</u> operties	\$97,876	\$229,292	\$167,120	\$68,512	\$92,396				
Q3 2021	\$230,/43	\$191,430	\$176,708	\$96,240	\$110,586	\$131,170				
Q4 2021	\$194,789	\$136,963	\$204,989	\$118,295	\$79,586	\$170,378				

10. Type "Time Period" in this new cell:

+	1					
Time Period	Summ	ary by	Regio	n		
	N. America	S. America	Caribbean	Europe	Asia	Australia/NZ
Q1 2020	\$139,158	\$151,642	\$196,386	\$191,292	\$157,967	\$100,852
Q2 2020	\$128,058	\$125,065	\$203,929	\$166,893	\$195,829	\$209,901
Q3 2020	\$246,707	\$174,103	\$165,362	\$177,158	\$216,034	\$152,258
Q4 2020	\$247,578	\$156,642	\$83,709	\$223,227	\$175,413	\$185,637
Q1 2021	\$170,773	\$222,247	\$174,036	\$174,952	\$139,779	\$168,186
Q2 2021	\$114,752	\$97,876	\$229,292	\$167,120	\$68,512	\$92,396
Q3 2021	\$230,743	\$191,430	\$176,708	\$96,240	\$110,586	\$131,170
Q4 2021	\$194,789	\$136,963	\$204,989	\$118,295	\$79,586	\$170,378

11. With your cursor still in that cell, click the Table Tools – Layout tab.:

⊟ +5 + 0 ≠ Aa	ivity 1-2 - Word		Table Tools							۲	- 1	o x
File Home Insert Design Layout Refere	nces Maiings	Review View	Design Layout	Tell me what yo	u want to do						Sign in	A Share
Marchine Century Gothine 11 * A* A* Paste	∧a - 🏕 🖽 - K - 🔺 - 📰 =	: :::::::::::::::::::::::::::::::::::	AdBbCc	AdBbCc Adl TNo Spac Head	Bb(AdBbC ng1 Heading 2	Aat /	aBbC AaBbCa Subtitle Subtle Em.	AdBbCc Emphasis	AaBbCc Intense E.,	AaBbCc Strong v	P Find *	, e ,
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	01 2020	N. America	\$151.442	¢104.384	¢101.202	#157.947	4100.852	-				
	00 2020	\$137,130	\$105.075	\$176,306	\$171,272	\$107,767	\$100,052	-				
	02 2020	\$120,030	\$125,065	\$203,929	\$166,073	\$195,029	\$209,901	-				
	Q3 2020	\$246,707	\$174,103	\$160,362	\$177,108	\$216,034	\$102,208	-				
	Q4 2020	\$247,370	\$136,642	\$03,707	\$223,227	\$175,415	\$100,607	-				
	Q12021	\$170,773	\$222,247	\$174,036	\$174,952	\$139,779	\$160,106	-				
	Q2 2021	\$114,752	\$97,876	\$229,292	\$167,120	\$68,512	\$92,396	-				
	Q3 2021	\$230,743	\$191,430	\$176,708	\$96,240	\$110,586	\$131,170	_				
	Q4 2021	\$194,789	\$136,963	\$204,989	\$118,295	\$79,586	\$170,378					
Page 1 of 1 82 words DR										15	1	+ 126%

12. Click the Text Direction command twice so that the text looks like the image shown below:

E 5·0 -	Activity 1-2 - Word	Table Tools				œ	-	o ×
File Home Insert Design Layout R	eferences Mailings Review	w View Design Layout	Q Tell me what you want to do				Sign in	A Share
Select View Properties Gridlines Table Draw Eraser Table Draw Row	t Inset Inset Inset Relative Left Right Calls s & Columns 75	ge Split Split Is Cells Table Merge	ht: 0.32" If Distribute Rows h: 0.76" Distribute Column Cell Size	ns Aigment	Sort Repeat Convert Formula Header Rows to Text Data			~
	Sunshin Annual ™ N. Arr 01 2020 \$139, 02 2020 02 2020 \$128, 03 2020 04 2020 \$139, 02 2020 01 2020 \$139, 02 2020 02 2020 \$139, 02 2020 03 2021 \$142, 03 2021 03 2021 \$142, 03 2021 04 2021 \$194, 3194,	Summ I Revenue I Revenue 198 1911,42 058 1912,42 058 1914,42 058 1915,642 077 1978 1956,642 173 192,247 752 197,876 743 191,430 789 136,963	Report Caribbean Europe 199,386 191,292 \$194,386 \$191,292 \$194,386 \$191,292 \$203,297 \$166,893 \$163,362 \$177,158 \$83,709 \$223,227 \$174,036 \$174,952 \$229,292 \$167,100 \$176,708 \$96,240 \$204,287 \$118,295	Asia Australia, 157.967 \$197.967 \$100.852 \$195.828 \$209.901 \$214.034 \$152.263 \$175.7413 \$185.637 \$103.9779 \$168.186 \$46.315 \$22.393 \$103.9779 \$168.185 \$45.110.586 \$31.170 \$110.586 \$131.170 \$479.586 \$170.378	NZ			
Page 1 of 1 82 words					単 🗏 15 -		+	+ 126%

13. Click the Align Center command in the Alignment group of the Table Tools – Layout tab:

	ج .					Activity	1-2 - Word										
	Ho		sert	Design	Layout	References	Mailings	Review	v View	D	lesign	Layout					
2			E	1	×		•					🚺 Heigl	nt: 0.32" 🗘	H Distribute Rows	999		
Select	View Gridlines	Propertie	s D Ta	raw Eraser able	Delete	Insert Inser Above Below	t Insert Insert v Left Right	Merge Cells	Split S Cells T	Split Fable	AutoFit *	🛺 Widt	n: 0.76° ‡	🛗 Distribute Columns		Text Direction	Cell Margins
	Table			Draw		Pours & Colu	mnr	-	Merge				Cell Size	E	A1	ignment	

14. Save your document as Activity 1-2 Complete. Close Microsoft Word 2016 to complete this activity.

TOPIC C: Perform Calculations in a Table

Another handy feature of tables in Microsoft Word is support for basic mathematical operations. While the list of supported formulas and functions is not as comprehensive as Microsoft Excel, you will be able to perform simple calculations. Microsoft Word also enables you to insert professional, non-functional equation diagrams.

Topic Objectives

In this topic, you will learn:

- About formulas and functions in Microsoft Word
- How to insert equations into a document

FORMULAS IN WORD

Defining Formulas

A **formula** is a mathematical expression used to calculate data. In Microsoft Word, formula results are stored as **fields**, enabling easy re-calculation and updating.

Microsoft Word's formulas take the following format:

=FUNCTION(ARGUMENTS)

For example, if you wanted to total Week 1 in this table:

]			
Region	Week 1	Week 2	Week 3
East	\$78,664	\$63,819	\$65,235
North	\$62,356	\$70,176	\$68,871
South	\$67,504	\$62,945	\$72,894
West	\$66,195	\$71,953	\$67,482
TOTALS			

You would use this formula:

=SUM(ABOVE)

Or, you can express the argument with the reference style used in Excel:

Entering Formulas

To perform a calculation in a table, place your cursor in the cell that you want the result to appear. Then, click Table Tools – Layout \rightarrow Formula:

8					Sales Rep	ort - Word												
File	Hon	ne Inse	rt Design	Layout	References	Mailings	Review	View	Design	Layout	🖓 Tell me	vhat you want to do				Sign ir	n A_s	hare
Select	View Gridlines Table	Properties	Draw Eraser Table Draw	Delete	Insert Insert Above Below Rows & Colum	Insert Insert Left Right Ins 5	Merge Spl Cells Cel	it Spi Is Tat ge	lit AutoFit	🚺 Heigl	nt: 0.2" n: 0.72" Cell Size	Distribute Rows	nns G A Direction Margins Alignment	A Z Sort Hea	Repeat der Rows Dat	Convert F to Text	fx ormula ⊳	~
					Sales	Rend	ort											
				•	Juics	пер	510											
					Region	Week 1	Week	2	Week 3									
					East	\$78,664	\$63,8	319	\$65,235									
					North	\$62,356	\$70,1	76	\$68,871									
					South	\$67,504	\$62,9	945	\$72,894									
					West	\$66,195	\$71,9	953	\$67,482									
					TOTALS													

Word will automatically choose the formula that it thinks is best. You can also enter a different formula, set the number format, or view a list of available functions:

Formula					?	\times
<u>F</u> ormula:						
=SUM(ABOVE)						
Number format:						
						\sim
Paste function:		Past	e book	cmark:		
	\sim					\sim
			ОК		Canc	el

Once you click OK, the result will be inserted into the cell.

Updating Formula Results

If your data changes at any time, click in the cell and press F9 on your keyboard to refresh the data. To lock the result to prevent updating, select the data and press Ctrl + F11. You can unlock the formula at any time by selecting it again and pressing Ctrl + Shift + F11. **Customizing the Number Format** If desired, you can specify a particular number format for the results when creating a formula. This is the preferred method as any customizations you make after inserting the formula may be overwritten if the results are later updated. As well, note that Word may apply its own format if it detects that the values to be calculated are all formatted in a similar way.

To customize the number format, click the appropriate menu in the Formula dialog and choose the desired option:

Formula	?	\times
<u>F</u> ormula:		
=SUM(ABOVE)		
<u>N</u> umber format:		
		X
#,##0		
#,##0.00		
S#,##0.00;(S#,##0.00)		
0		
0.00		~

You can then make further customizations to the data in the "Number format" field (such as removing or adding decimal values) and they will be applied to the formula results.

FUNCTIONS IN WORD

A **function** is the action specified in a formula that determines what mathematical operation will be performed on the target data. You can view the available functions in the Formula dialog box by clicking the "Paste function:"

Formula		?	\times
<u>F</u> ormula:			
= SUM(ABOVE)			
Number format:			
			\sim
Paste f <u>u</u> nction:	Paste bookma	rk:	
X			\sim
ABS			
AND	OK	Car	ncel
AVERAGE			
COUNT			
DEFINED			
FALSE			
IF			
INT Y			

To insert a function into the Formula text box, click on one of the options listed. Alternatively, you can also type the formula in manually if desired.

Arguments

As we saw earlier, there are several different ways that you can enter the cells to be calculated (called **arguments**).

Let's look at our sample table again:

]			
Region	Week 1	Week 2	Week 3
East	\$78,664	\$63,819	\$65,235
North	\$62,356	\$70,176	\$68,871
South	\$67,504	\$62,945	\$72,894
West	\$66,195	\$71,953	\$67,482
TOTALS			

Now, let's look at what the arguments would be for the numeric values in the Week 1 column.

Argument Type	Description	Example
Bookmarks	If a cell range is bookmarked, use the name as the argument.	SUM(Week1)
Column-Row	Enter the column letter followed by the row number.	SUM(B2:B5)
Numerical	Enter the values to calculate.	SUM(78664,62356,67504,66195)
Positional	Choose values to calculate relative to the selected cell.	SUM(ABOVE)

EQUATIONS

Microsoft Word also allows you to insert equations into your documents. These diagrams allow you to demonstrate complex calculations, but do not provide mathematical functionality.

To add an equation to your document, click Insert \rightarrow Equation and choose the equation that you want to use:



Note the scroll bars to see more equations, and the option to see more equations on Office.com. You can also create your own custom eqation.

Once you choose an equation, you will see it in your document. The Equation Tools – Design tab will also become available:



To change the alignment or appearance (professional vs. linear) of the equation, click the arrow on the right-hand side of its container. You can also use the commands in the Tools group on the Equation Tools – Design tab:

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π Equati	on Ec	Ink Juation	Dinea	ssional r ial Text	± C	∞ = ∂ √	≠ ^ ∛	~ × ∜ ∪ [+ ! (x < «	> ≫ °C ∆ s	≤	≥ ∓ ∃ ₿	F (≚ ≈ : Э	=	∀ ^ * *	$\frac{x}{y}$ Fraction	e ^x	$\sqrt[n]{\chi}$ Radic	€ ∫_ cal integ	r d x pral Lar Open	ige I ator*	{()} Bracket	sin 6 Functio	on Acce	nt Limit Log	and Op	Denator Mat	0 1 trix				^
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ACTIVITY 1-3

Performing Calculations in a Table

In this activity, you will create formulas to calculate average and total sales in our sample travel report.

1. Open Microsoft Word 2016 and open Activity 1-3:



2. Our first task is to calculate the average sales for each region. Click in the first cell next to Average Sales to place your cursor there. Click Table Tools – Layout \rightarrow Formula:

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File Home Insert Design	Layout References Mailings	Review View	Design Layout	V Tell me what yo	u want to do					Sign in 🔉 Share
Select View Properties - Gridlines Table Draw Eraser Table Draw	Delete * Delete	t Merge Split Spl t Cells Cells Tab	it AutoFit	he 0.3"	Distribute Rows Distribute Column		Test Cell S Direction Margins	iont Repeat Com Header Rows to T Data	fx Vert Formula	~
	Suns Annu ®	hine Tr Jal Re	avel venue Sumr	Repo	ort oy Reg	gion				
		N. America	S. America	Caribbean	Europe	Asla	Australia/NZ			
	Q1 2020	\$139,158	\$151,642	\$196,386	\$191,292	\$157,967	\$100,852			
	Q2 2020	\$128,058	\$125,065	\$203,929	\$166,893	\$195,829	\$209,901			
	Q3 2020	\$246,707	\$174,103	\$165,362	\$177,158	\$216,034	\$152,258			
	Q4 2020	\$247,578	\$156,642	\$83,709	\$223,227	\$175,413	\$185,637			
	Q1 2021	\$170,773	\$222,247	\$174,036	\$174,952	\$139,779	\$168,186			
	Q2 2021	\$114,752	\$97,876	\$229,292	\$167,120	\$68,512	\$92,396			
	Q3 2021	\$230,743	\$191,430	\$176,708	\$96,240	\$110,586	\$131,170			
	Q4 2021	\$194,789	\$136,963	\$204,989	\$118,295	\$79,586	\$170,378			
	AVERAGE	1								
	GRAND									

3. The Formula dialog will open. In the Formula text box, type, "=AVERAGE(ABOVE)":

Formula				?	×
<u>F</u> ormula: =AVERAGE(ABOVE)					
<u>N</u> umber format:					~
Paste f <u>u</u> nction:	~	Paste bool	kmark:		>
		OK		Cance	el

4. Click the "Number format" menu and choose the third format in the list:

Formula	?	×
<u>F</u> ormula:		
=AVERAGE(ABOVE)		
<u>N</u> umber format:		
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5. Remove the period and two zeros from both sections of the format mask so that it looks like the example shown below:

Formula			?	×
<u>F</u> ormula:				
=AVERAGE(ABOVE)				
Number format:				
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Paste f <u>u</u> nction:	\sim	Paste bookn	nark:	~
		OK		Cancel

6. Click OK:

Formula				?	×
<u>F</u> ormula:					
=AVERAGE(ABOVE)					
Number format:					
\$#,##0;(\$#,##0)					\sim
Paste function:		Paste bo	okmark:		
	\sim				\sim
		OK	2	Canc	el

÷												
		Summary by Region										
		N. America	S. America	Caribbean	Europe	Asia	Australia/NZ					
	Q1 2020	\$139,158	\$151,642	\$196,386	\$191,292	\$157,967	\$100,852					
	Q2 2020	\$128,058	\$125,065	\$203,929	\$166,893	\$195,829	\$209,901					
	Q3 2020	\$246,707	\$174,103	\$165,362	\$177,158	\$216,034	\$152,258					
	Q4 2020	\$247,578	\$156,642	\$83,709	\$223,227	\$175,413	\$185,637					
	Q1 2021	\$170,773	\$222,247	\$174,036	\$174,952	\$139,779	\$168,186					
	Q2 2021	\$114,752	\$97,876	\$229,292	\$167,120	\$68,512	\$92,396					
	Q3 2021	\$230,743	\$191,430	\$176,708	\$96,240	\$110,586	\$131,170					
	Q4 2021	\$194,789	\$136,963	\$204,989	\$118,295	\$79,586	\$170,378					
	AVERAGE SALES	\$184,070										
	GRAND TOTAL											

7. You will see the average for North American sales in the designated cell:

8. Press the right arrow key on your keyboard to move to the next cell in the table. Click the Repeat arrow on the Quick Access toolbar to apply this formula to this cell:

File Home Insert Design	Activity 1-3 - Word Layout References Mailings	Review View	Table Tools Design Layout	♀ Tell me what yo	u want to do				0	1 — Sign in	□ × A Share
Select View Properties Draw Eraser * Gridlines Table Draw	Pelete * Above Below Left Right Rows & Columns	Merge Split Spl Cells Cells Tab	it AutoFit Widt	ht 0.3" : : : : : : : : : : : : : : : : : : :	Distribute Rows Distribute Column		Test Cell Sor lirection Margins	t Repeat Co Header Rows to Data	nvert Formula Text		^
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			Sumr	nary b	y Reg	gion					
		N. America	S. America	Caribbean	Europe	Asia	Australia/NZ	1			
	Q1 2020	\$139,158	\$151,642	\$196,386	\$191,292	\$157,967	\$100,852				
	Q2 2020	\$128,058	\$125,065	\$203,929	\$166,893	\$195,829	\$209,901]			
	Q3 2020	\$246,707	\$174,103	\$165,362	\$177,158	\$216,034	\$152,258				
	Q4 2020	\$247,578	\$156,642	\$83,709	\$223,227	\$175,413	\$185,637				
	Q1 2021	\$170,773	\$222,247	\$174,036	\$174,952	\$139,779	\$168,186				
	Q2 2021	\$114,752	\$97,876	\$229,292	\$167,120	\$68,512	\$92,396				
	Q3 2021	\$230,743	\$191,430	\$176,708	\$96,240	\$110,586	\$131,170				
	Q4 2021	\$194,789	\$136,963	\$204,989	\$118,295	\$79,586	\$170,378				
	AVERAGE SALES	\$184,070	1								
Bana 1 of 1 - 35 seconds - 172	GRAND TOTAL										a 1265

	Summary by Region								
	N. America	S. America	Caribbean	Europe	Asia	Australia/NZ			
Q1 2020	\$139,158	\$151,642	\$196,386	\$191,292	\$157,967	\$100,852			
Q2 2020	\$128,058	\$125,065	\$203,929	\$166,893	\$195,829	\$209,901			
Q3 2020	\$246,707	\$174,103	\$165,362	\$177,158	\$216,034	\$152,258			
Q4 2020	\$247,578	\$156,642	\$83,709	\$223,227	\$175,413	\$185,637			
Q1 2021	\$170,773	\$222,247	\$174,036	\$174,952	\$139,779	\$168,186			
Q2 2021	\$114,752	\$97,876	\$229,292	\$167,120	\$68,512	\$92,396			
Q3 2021	\$230,743	\$191,430	\$176,708	\$96,240	\$110,586	\$131,170			
Q4 2021	\$194,789	\$136,963	\$204,989	\$118,295	\$79,586	\$170,378			
AVERAGE SALES	\$184,070	\$156,996	\$179,301	\$164,397	\$142,963	\$151,347			
GRAND TOTAL									

9. You will see the results of the formula in the designated cell. Repeat Step 8 to apply the formula to the remaining cells in the Average Sales row:

10. Now let's total up all the sales. Click to place your cursor in the blank row next to "Grand Total." Click Table Tools – Layout \rightarrow Formula:

日 5·	Activity 1-3 - Word ayout References Mailings	Review View	Table Tools Design Layout	🖗 Tell me what yo	u want to do				œ	l — Sign in	□ × A Share
Select View Properties Gridlines Table Draw	velete velete	Menge Split Spli Calls Cells Tab	it AutoFit widt	he 0.3"	Distribute Rows Distribute Column		Test Cell Sor Nirection Margins	Repeat Con Header Rows to Data	fx Formula Text		~
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			venue	Kept				1			
			Sumr	nary b	y Reg	gion					
		N. America	S. America	Caribbean	Europe	Asia	Australia/NZ]			
	Q1 2020	\$139,158	\$151,642	\$196,386	\$191,292	\$157,967	\$100,852				
	Q2 2020	\$128,058	\$125,065	\$203,929	\$166,893	\$195,829	\$209,901]			
	Q3 2020	\$246,707	\$174,103	\$165,362	\$177,158	\$216,034	\$152,258				
	Q4 2020	\$247,578	\$156,642	\$83,709	\$223,227	\$175,413	\$185,637				
	Q1 2021	\$170,773	\$222,247	\$174,036	\$174,952	\$139,779	\$168,186				
	Q2 2021	\$114,752	\$97,876	\$229,292	\$167,120	\$68,512	\$92,396				
	Q3 2021	\$230,743	\$191,430	\$176,708	\$96,240	\$110,586	\$131,170				
	Q4 2021	\$194,789	\$136,963	\$204,989	\$118,295	\$79,586	\$170,378				
	AVERAGE SALES	\$184,070	\$156,996	\$179,301	\$164,397	\$142,963	\$151,347				
	GRAND			I							

11. We want to sum up all the values in the table except for the Average Sales row that we just created, so replace the "ABOVE" reference text with "B3:G10":

Formula		?	×
<u>F</u> ormula: = SUM(B3:G10)			
			\sim
Paste f <u>u</u> nction:	Paste bookr	mark:	~
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12. Choose the same number format that we used previously, removing the decimal point and the trailing zeroes:

Formula				?	×
<u>F</u> ormula:					
=SUM(B3:G10)					
Number format:					
\$#,##0;(\$#,##0)					\sim
Paste function:		Paste boo	okmark:		
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		OK		Cance	el

13. Click OK:

Formula		?	×
<u>F</u> ormula:			
=SUM(B3:G10)			
<u>N</u> umber format:			
\$#,##0;(\$#,##0)			\sim
Paste f <u>u</u> nction:	Paste bookr	nark:	
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14. The grand total will now be displayed:

•											
	Summary by Region										
	N. America	S. America	Caribbean	Europe	Asia	Australia/NZ					
Q1 2020	\$139,158	\$151,642	\$196,386	\$191,292	\$157,967	\$100,852					
Q2 2020	\$128,058	\$125,065	\$203,929	\$166,893	\$195,829	\$209,901					
Q3 2020	\$246,707	\$174,103	\$165,362	\$177,158	\$216,034	\$152,258					
Q4 2020	\$247,578	\$156,642	\$83,709	\$223,227	\$175,413	\$185,637					
Q1 2021	\$170,773	\$222,247	\$174,036	\$174,952	\$139,779	\$168,186					
Q2 2021	\$114,752	\$97,876	\$229,292	\$167,120	\$68,512	\$92,396					
Q3 2021	\$230,743	\$191,430	\$176,708	\$96,240	\$110,586	\$131,170					
Q4 2021	\$194,789	\$136,963	\$204,989	\$118,295	\$79,586	\$170,378					
AVERAGE SALES	\$184,070	\$156,996	\$179,301	\$164,397	\$142,963	\$151,347					
GRAND TOTAL	\$7,832,598										

15. Save your document as Activity 1-3 Complete. Close Microsoft Word 2016 to complete this activity.

TOPIC D: Create a Chart

Tables are a great way to summarize data, but sometimes a picture is worth a thousand words. Luckily, Microsoft Word integrates with Microsoft Excel so that you can easily turn table data into a chart.

Topic Objectives

In this topic, you will learn:

- What a chart is
- What components make up a chart
- About the chart types available in Microsoft Word
- How to create a basic chart
- About the commands on the Chart Tools contextual tab set
- About the Quick Analysis buttons available for charts
- How to change the chart type
- How to edit chart data
- How to save a chart as a template for future use
- How to add a caption to a chart

CHARTS

A **chart** is a graphical representation of data and relationships in a dataset. Charts are commonly used in situations where readers need to be able to quickly interpret data and view key points.

CHART COMPONENTS



There are many different types of charts available in Microsoft Word, but most of them share the same components. Let's look at a few of the most common elements that you will see.

At the top of the chart, you will usually see a **title (1)**. As well, a **legend (2)** is often shown with the chart to help readers identify what the various **data points (3)** represent. Most charts represent these points using **X and Y axes (4)**. The overall working area of the chart is called the **plot area (5)**.

TYPES OF CHARTS

There are 13 main categories of charts that you can create with Microsoft Word. (These categories are the same as those available in Excel.) They are:

- Column
- Line
- Pie
- Bar
- Area
- X Y (Scatter)
- Stock
- Surface
- Radar
- Treemap
- Sunburst
- Histogram
- Box & Whisker

As well, Microsoft Word features a few built-in combinations of the above chart types and the ability to create custom combinations.

Note that not all chart types will do justice to your data. In fact, some chart types just won't make sense at all! You may need to experiment with different chart formats in order to find one that makes sense.

CREATING A CHART

Now that we fully understand what charts are, let's create one. To start, determine where your data is going to come from. If it is already in your document (or in another location), copy it. If you still have to enter the data, that's OK – we can do it after creating the chart.
Next, click to place your cursor where you want the chart to go and click Insert \rightarrow Chart:



The Insert Chart dialog box will open. Click a chart type from the left-hand side:

Then, you will see specific chart styles at the top of the dialog, with a preview of the selected style shown in the middle of the dialog. Click an option to select it:

Insert Chart		?	Х
All Charts			
IC harts Image: Recent Image: Templates Image: Column Image: Column			
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When you're ready, click OK to create the chart. You will now see a Microsoft Excel window on top of the Word window:



Now, you can paste the data into the Excel sheet or enter it by hand:

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	А	В	С	D	E	F	G	Н	I		
1	Region	Week 1	Week 2	Week 3							
2	East	\$78,664	\$63,819	\$65,235							
3	North	\$62,356	\$70,176	\$68,871							
4	South	\$67,504	\$62,945	\$72,894							
5	West	\$66,195	\$71,953	\$67,482							
6											
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You can make the source data larger or smaller by clicking and dragging the blue triangle at the bottom of the chart data:

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	А	В	С	D	E	F	G	Н	I	
1	Region	Week 1	Week 2	Week 3						
2	East	\$78,664	\$63,819	\$65,235						
3	North	\$62,356	\$70,176	\$68,871						
4	South	\$67,504	\$62,945	\$72,894						
5	West	\$66,195	\$71,953	\$67,482	1					
6										
7										
•										Þ

Once you have finished editing the data, close the Excel window. Your chart will now appear in Word:



THE CHART TOOLS TABS

Let's take a quick look at the Chart Tools contextual tabs.

Chart Tools – Design Tab

The first tab that appears when working with charts is Design:

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File	Home	Insert	Design	Layout	References	Mailings	Review	View	Design	Format	t 🛛 🖓 Tell i	me what you war	it to	do				
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Element	* Layout *	Colors -	And provided		and part of	-		and the star					Ŧ	Column	Data	Data 🕶	Data	Chart Type
Charl	Layouts						Chart Style	es							Data			Type

The groups are:

- Chart Layouts group: Change the way the chart is organized and choose what elements are displayed.
- **Chart Styles group**: Change the appearance of the chart.
- Data group: Select, edit, or refresh data, or change how data is displayed.
- **Type group**: Change the chart type.

Chart Tools – Format Tab

Next we have the Format tab:

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File										Design Forma	t 🛛 🖓 Tell me wh										R s⊧	are
Series 'W	leek 3* at Selection	•			Abc	Abc	Abc	Abc	Abc	Abc Abc v	A Shape Fill *	Α	А	A	A Text Fill *	Position	Wrap	Bring Forward	P Align ▼ 「白」Group ~	\$1] o*		
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Curr	ent Selection		Insert Shane	P.5				Sh	ane Styles		5		We	ordårt Styles				Arrange		Stre		~

The groups are:

- **Current Selection group**: Choose what part of the chart to format, open the Format dialog for that component, or reset the component.
- Insert Shapes group: Add shapes or a text box to your chart.
- Shape Styles group: Choose a style for the selected component, or manually format its fill, outline, and effects.
- WordArt Styles group: Choose a style for the selected text, or manually format its fill, outline, and effects.
- **Arrange group**: Send the current component forward or backward in the stack; align, rotate, or group the component; or view the Selection Pane.
- Size group: Set the size of the current component.

CHART QUICK ANALYSIS BUTTONS

In addition to the contextual tabs, you can use the Quick Analysis buttons to customize your chart. These buttons will appear to the right of a chart when it is selected



From top to bottom, these buttons will open a mini task pane for Layout Options, Chart Elements, Chart Styles, and Chart Filters:



CHANGING THE CHART TYPE

To change the chart type (say, from a bar chart to a line chart), click the chart to select it. Then, click Chart Tools – Design \rightarrow Change Chart Type:

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File Home Insert Design Layout Referen	nces Mailings Review View	Design Format	Q Tell me what you want to do		Sign in 🧏 Share
Add Chart Quick Bernert * Layout * Chart Layout *	Chart Styles		Switch Row Select Eds Refresh Column Data Data	Change Chat Type Type	
				Dange Chart Type Change to a different type of chart.	
	Sales Report	-			
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(You can also find this command on the right-click menu.)

The Change Chart Type dialog box will open. It works in the same way as the Insert Chart dialog box that we discussed earlier. Simply choose the new type of chart and click OK:

Chang	e Chart Type		?	×
All Ch	arts			
	Recent Templates Column Line Pie Bar Area X Y (Scatter) Stock Surface Radar Treemap Sunburst Histogram Box & Whisker Waterfall Combo	<image/>		
		ок	Can	icel



All chart formatting options and data will be shown in the new chart:

EDITING CHART DATA

If you need to make changes to the chart's data, click the Edit Data command on the Chart Tools – Design tab, or right-click the chart and click Edit Data:



This will re-open the miniature Excel window so that you can edit your data:



As you make your changes, Word will update the chart. Just close the Excel window when you're done.

SAVING A CHART AS A TEMPLATE

If you have customized a chart and would like to save it for re-use, right-click the chart and click "Save as Template:"

File Home Insert Design Layout	References Mailings Review View	Design Format 🖓 Tell me	ne what you want to do	Sign in	A Share
Plot Area	Abc Abc Abc Abc Abc	Abc Abc v Shape Fill v Abc v Shape Outlin v Shape Effect	ine - Karal A A Text Fill A Te	Align * 2 Group * A Rotate *	:
	Sales Repor	t Chart Title	Image: Clean Area Image		
	Ó \$40,000 \$30,000 \$20,000 \$10,000 \$0 East	North	Hit Change Chart Type. O Hit San at Transition. O Die Station. O O O O O O O O O O O O O O O O O O O O		
		WEEK 1 WEEK 2	dit. Format Chart Area		

In the Save Chart Template dialog box, enter the desired file name and click Save:

Save Chart Templa	ate									Х
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✓		Name	^		Date modified	Туре	Size			
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👆 Downloads	*									
🔮 Documents	*									
Pictures	*									
J Music										
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File name:	Sales Cl	hart								~
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We highly recommend leaving the location set to the default chosen by Word. This way, your new template will be accessible from the Templates category in the Insert Chart and Change Chart Type dialog boxes:

Insert (Chart		?	×
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5	Recent	My Templates		
le di	Templates	Sales Chart Chart Title		
	Line			
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e e	Surface			
	Radar			
	Support			
աներ հաներ	Histogram			
ŢŽŽ	Box & Whisker			
	Waterfall			
leBa	Combo			
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THE CAPTION DIALOG BOX

To add a caption to a chart, start by selecting it. Then, click References \rightarrow Insert Caption:

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The Caption dialog will open. Here, you can type your caption and set related options. Click OK when you are finished:

Caption			?	×
Caption: Figure 1: J Options	une Sales			
<u>L</u> abel:	Figure			\sim
Position:	Below sele	ected item		\sim
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AutoCapti	on	ОК	Can	cel

The caption will then appear with the chart:

E 5·0 ·	Sales Report - Word	00 – 0 ×
File Home Insert Design Layout References Mailin	gs Review View ♀ Tell me what you want to do	Sign in 🔉 Share
Image: Table of Contents Add Text - Footnets Add Text - Footnets Image: Table of Contents Image: Table of	nage Source: Diver Table of Figure 1 (a JAA - U) Update Table of Figure 1 Update Table of Figure 1 Update Table of Figure 1 Update Table of Authorities Mark Cation 2 Caption 2 Caption 2 Table of Authorities 1 Table of Authorities 1 Tabl	^
		-
Sale	es Report	
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\$50,000		
\$40,000		
\$30,000		
\$20,000		
\$10,000		
\$0	East North South West	
	Week 1 Week 3	
Figure 1: Ju	ne Sales	

Note that captions can be edited like any other text.

ACTIVITY 1-4 Creating a Chart

In this activity, we will complete our sales report by adding a chart to it.

1. Open Microsoft Word 2016 and open Activity 1-4:



2. To begin, select all rows in the table except the first. Right-click the selection and click Copy:

		Sum	n		1	• D	rion	
Region	N. America	S. America	в	I ≡ ª½ - ▲ -	2	👌 🕶 🔛 🕶 Inse	rt Delete	Australia/NZ
Q1 2020	\$139,158	\$151,642	×	¢107.207 Cut		\$191,292	\$157,967	\$100,852
Q2 2020	\$128,058	\$125,065		<u>С</u> ору		\$166,893	\$195,829	\$209,901
Q3 2020	\$246,707	\$174,103	ĥ	Paste Options?		\$177,158	\$216,034	\$152,258
Q4 2020	\$247,578	\$156,642		locart		\$223,227	\$175,413	\$185,637
Q1 2021	\$170,773	\$222,247		Delete Cells	ŕ	\$174,952	\$139,779	\$168,186
Q2 2021	\$114,752	\$97,876		Merge Cells		\$167,120	\$68,512	\$92,396
Q3 2021	\$230,743	\$191,430		Border Styles	ŀ	\$96,240	\$110,586	\$131,170
Q4 2021	\$194,789	\$136,963	••••	Table Properties		\$118,295	\$79,586	\$170,378
AVERAGE SALES	\$184,070	\$156,996	\$2	New Co <u>m</u> ment		\$164,397	\$142,963	\$151,347

3. Click to place your cursor at the bottom of the document. Click Insert \rightarrow Chart:

⊟	জ - ত	÷							
File	Home	Insert	Design	Layout	Reference	s N	/lailings	Review	View
				1			0+	肖 Store	
Cover Page ∗	Blank Page Page Break	Table •	Pictures	Online Shap Pictures *	oes SmartArt	Chart	Screenshot *	🕤 My A	dd-ins 👻
	Pages	Tables		1	llustrations	63	a		Add-ins

4. Click the XY (Scatter) category on the left-hand side. Click the second type and click OK:



5. A small Microsoft Excel window will open. Right-click in cell A1 and click Paste (Match Destination Formatting):



6. Close the Excel window:

6	ب ک	∂ - ≣	Chart in Microsoft Word						×	
	A	В	С	D	E	F	G	Н	1	
1	Region	N. America	S. America	Caribbear	Europe	Asia	Australia/	NZ		
2	Q1 2020	\$139,158	\$151,642	\$196,386	\$191,292	\$157,967	\$100,852			
3	Q2 2020	\$128,058	\$125,065	\$203,929	\$166,893	\$195,829	\$209,901			
4	Q3 2020	\$246,707	\$174,103	\$165,362	\$177,158	\$216,034	\$152,258			
5	Q4 2020	\$247,578	\$156,642	\$83,709	\$223,227	\$175,413	\$185,637			
6	Q1 2021	\$170,773	\$222,247	\$174,036	\$174,952	\$139,779	\$168,186			
7	02 2021	\$114.752	\$97.876	\$229.292	\$167.120	\$68.512	\$92,396			
•									1	Þ

7. You will see your chart in the Microsoft Word window. However, you can also see that this particular chart type is not very useful for displaying our data. Let's try changing the chart type. Click the chart to select it and display the Chart Tools tabs:



8. Click Chart Tools – Design \rightarrow Change Chart Type:



9. The Change Chart type dialog box will open. Click the Column category. The first type should be selected automatically. Click OK:



10. The new chart type will be applied:



11. Now let's add a title. Click Chart Tools – Design \rightarrow Add Chart Element \rightarrow Chart Title \rightarrow Above Chart:



12. Double-click in the Chart Title text box that appears. Type, "Sales Chart" in place of the existing text:



13. Finally, let's filter out some of the chart data. Click the Chart Filters Quick Analysis button next to the chart:



(If you do not see this button, click off of the chart and re-select it.)

14. In the task pane that opens, uncheck the "Select All" box:

Values	Names		
 Series 			-
💌 (S	elect All)		
√3 <mark> </mark>	N. America		
\checkmark	S. America		
\checkmark	Caribbean		
\checkmark	Europe		
\checkmark	Asia		
\checkmark	Australia/NZ		
▲ Catego	ories		
✓ (S	elect All)		
✓ Q	1 2020		
✓ Q	2 2020		
✓ Q	3 2020		
	•		▼
Apply		Select Data	

15. Check the boxes for North and South America only. Click Apply:

Values Names	
▲ Series	
(Select All)	
N. America	
S. America	
Caribbean	
Europe	
Asia	
Australia/NZ	
▲ Categories	
✓ (Select All)	
✓ Q1 2020	
✓ Q2 2020	
V Q3 2020	
Q 4 9 9 9 9	r
Apply Select Data	

16. Now, only those values will be shown in the chart:

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17. Save your document as Activity 1-4 Complete. Close Microsoft Word 2016 to complete this activity.

Summary

In this lesson, we learned about various ways to manage numerical data in Microsoft Word. We began by looking at how to sort table data, control cell layout, and perform calculations in a table. We also learned how to display numerical data as a chart or equation.

REVIEW QUESTIONS

- 1. What are the two contextual tabs available for modifying charts?
- 2. What is the command sequence to sort table data?
- 3. Which tab other than the Table Tools Layout tab can be used to align table data?
- 4. What feature do graphical equations not contain?
- 5. What is the command sequence to edit chart data?

LESSON 2: CUSTOMIZING FORMATS USING STYLES AND THEMES

Lesson Objectives

In this lesson you will learn how to:

- Create and modify text styles
- Create styles for lists
- Create styles for tables
- Apply and customize document themes

TOPIC A: Create and Modify Text Styles

Styles should be used for most Microsoft Word documents. This powerful tool can help you keep even the most complex document organized and consistent. It can also make updates simple and seamless. In this topic, you'll receive an introduction to using and creating styles.

Topic Objectives

In this topic, you will learn:

- About the types of styles available in Microsoft Word
- How to apply styles to text
- How to modify character spacing and apply kerning
- How to create custom styles with the Create New Style from Formatting dialog box
- How to modify styles
- How to assign keyboard shortcuts to styles

TYPES OF TEXT STYLES

What Is A Style?

A **style** is a saved set of formatting options. For example, let's say that you have a design that you would like to use for major headings, minor headings, and sub-headings. Microsoft Word will allow you to save this formatting so that you can apply it multiple times. This will increase productivity, save time, and ensure that your document remains consistent.

Microsoft Word also includes a wide variety of themes, style sets, and text styles to give you a starting point for your document's design.

Style Types

There are five types of styles available in Microsoft Word 2016.

Style Type	Description	Example Style
Character	These styles can be applied to individual characters. Attributes can include font face, size, color, and effects.	Strong a
Paragraph	These styles must be applied to entire paragraphs. Attributes can include spacing, borders, and alignment.	Caption ¶
Linked Paragraph and Character	Contains both a paragraph style and a character style that are linked.	Heading 1 📲
Table	Contains formatting particular to tables.	Table styles are visible in the Table Styles group of the Table Tools – Design tab.
List	Contains formatting particular to lists.	1. List Number ¶

Heading and Subheading Styles

Styles can also make your document easier to navigate. Headings can be used in tools like the Navigation Pane and tables of contents:



You can also collapse and expand headings right within the document to make it easier to navigate. Just move your cursor to the left side of text that has a heading style applied and click the arrow:

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Paste V Format Painter	albeitüght 0 · 13 · A A · 4 E · 王 · 元 · 田田 如 机 Aabbook Aabboo	aBbCcD AaBbCcDi Subtitle Subtle Em =	P Find ▼ ab Replace Select ▼	
Clipboard r ₂	Font 12 Paragraph 12 Styles		5 Editing	^
	List of Products and Services What will we offer? Market Analysis Who will we sell to? Organizational Structure VP of Sales and Marketing VP of Sales Sales Team Trade Show Team			
rear on a roomona roo				

Body and Heading Styles

The appearance of the styles available in each document are controlled by the document's theme and style set, which will be discussed in Topic C. Each theme contains a heading and body font, which act as the top-level setting for those styles of that type.

+Styles

If you add your own formatting to text, it can be shown in the Styles pane as its own ad-hoc style:

Styles	- ×
Body Text	<u>¶a</u>
Body Text + Bold	
Body Text 2	<u>¶a</u>
Body Text 3	<u>¶a</u>
Body Text First In	d¶a
Body Text First	Ir <u>¶a</u>
Body Text Indent	<u>¶a</u>
Body Text Indent	2 <u>¶a</u>
Body Text Indent 3	<u>¶a</u>
Show Preview Disable Linked Styles	ptions

To enable this option, click the Manage Styles button in the Styles task pane:

Styles	- ×
Body Text	<u>па</u> 📤
Body Text + Bold	
Body Text 2	<u>¶a</u>
Body Text 3	<u>¶a</u>
Body Text First Ir	nd <u>¶a</u>
Body Text First	Ir <u>¶a</u>
Body Text Indent	<u>¶a</u>
Body Text Indent	t 2 <u>¶a</u>
Body Text Indent 3	<u>¶a</u> ▼
Show Preview Disable Linked Styles)ptions

The Style Pane Options dialog box will open. Check all three options in the "Select formatting to show as styles" section and click OK:

Style Pane Options	?	×
Select styles to show:		
All styles		\sim
S <u>e</u> lect how list is sorted:		
As Recommended		\sim
Select formatting to show as styles: <u>Paragraph level formatting</u> <u>Font formatting</u> <u>Bullet and numbering formatting</u>		
Select how built-in style names are shown Sho <u>w</u> next heading when previous level is used <u>H</u> ide built-in name when alternate name exists		
Only in this document O New documents based on	this te	mplate
OK	Car	ncel

These options can be disabled at any time.

APPLYING STYLES

To apply a style, select the text that you want to format and then click the appropriate style from the Styles gallery on the Home tab:

E 5.0 -	ZoomFoods - Word	•	-		×
File Home Insert Design Layout	References Mailings Review View 🖓 Tell me what you want to do		Sign in	A, Shar	e
A Cut Paste → Gopy Paste → Format Painter → Galibri (Body) → 11 → B I <u>U</u> → abe x, x ³	ペ ネ AsbCct AaBbCc Aa	Dt v	P Find	r re r	
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E	Business Plan				
P	Company Description Product List				
	500 gram single-serve product				
	750 gram family product				
	800 gram dessert packages				
	Mix and Match package				
	30-day meal package				
s	Service List				
	In-home parties				
	Door-to-door consultants				
E	Executive Summary Here we will summarize the business plan.				
N	Marketing and Sales Strategy				
Page 4 of 9 2 of 285 words []8	Ø		4	+ 126	%

If you don't see a style that you like, click the up and down arrows at the right of the gallery to scroll through the available styles. Alternatively, you may see all styles at once by clicking the More arrow ($\overline{}$) below the arrow buttons:

AaBbCcDc	AaBbCcDc	AaBbC	AaBbCc	AaBbCcD	AaBl	AaBbCcD	AaBbCcDu
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44. Apply S	Styles						

As you move your cursor over each style, you will see a preview of it on the page (as long as your cursor is placed within text). You can click any style to apply it.

You can also use the Styles task pane to apply styles. To start, click the option button in the Styles group on the Home tab:



Now, select the text to format. Then, click the style you want to apply from the Styles task pane. You will see the details of each style as you mouse over it:

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	Marketing and Sales Strategy	
Page 4 of 9 2 of 285 words	Q8	00 📰 05 - 🕂 + 126%

There is also a Styles gallery available on the mini toolbar:

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	30-day meal package AaBbCcDc 1 List Pare	Book Title
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	Door-to-door consultants Executive Summary Here we will summarize the business plan.	
Page 4 of 9 2 of 285 words	Marketing and Sales Strategy	

CHARACTER SPACING

Another element of text customization is the spacing and kerning of characters. To view these options, select the text that you want to modify. Then, click the option button in the Font group of the Home tab or press Ctrl + D:



Either action will open the Font dialog. Click the Advanced tab:

Font		? ×
Font Advanced		
Ent: +Body +Bedy +Headings Agency FB Algerian Arial Font <u>c</u> olor: <u>Underline style</u> (none) Effects	Font style: Size: Regular Italic Bold Bold Italic Underline color: V Automatic	
 Strikethrough Double strikethrough Superscript Subscript 	Small ca All caps Hidden	ps
Preview Pro Pro This is the body theme font. The current of	oduct List	font will be used.
Set As <u>D</u> efault Text <u>Effects</u>	ОК	Cancel

The options in this tab are divided into three sections. Let's focus on the first section, which deals with character spacing and kerning:

Font	?	×
Font Advanced		
Character Spacing		
S <u>c</u> ale: 100%		
Spacing: Normal V By:		
Position: Normal V By:		
■ Kerning for fonts:		
OpenType Features		
Ligatures: None 🗸		
Number spacing: Default 🗸		
Number <u>f</u> orms: Default		
Stylistic sets: Default 🗸		
Use Contextual <u>A</u> lternates		
Preview		
Product List		
This is the body theme font. The current document theme defines which	font will b	oe used.
Set As <u>D</u> efault Text <u>Effects</u> OK	с	ancel

The first option in this section is **Scale**. You can use a regular size font, but select a percentage so the font is scaled up or down.

The next option is **Spacing**. You can set spacing to Normal, Condensed, or Expanded, and then choose a point size. You can also modify **position** options to normal, raised, or lowered, and specify a point size for this position.

The last check box enables **Kerning**, which adjusts the spacing between letters so that it looks consistent. If you enable kerning, you can also specify what sizes you want Word to kern (from a certain point on).

CUSTOM STYLES

You can also create your own style with the Styles task pane. To start, click the New Style button at the bottom of the Styles task pane:

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You will then see the Create New Style from Formatting dialog:

Create New Style from Formattin	ng	?	×
Properties			
<u>N</u> ame:	Style1		
Style type:	Paragraph		\sim
Style <u>b</u> ased on:	¶ Normal		\sim
Style for following paragraph:	¶ Style1		~
Formatting			
Calibri (Body) 🗸 11 🗸	B I U Automatic V		
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Previous Paragraph Previous Paragra	ph Previous Paragraph Previous Paragraph Previous Paragraph Previous		
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Note that the settings here will be based on the text around the current location of your cursor. Simply set your options and click OK to create the style.

THE CREATE NEW STYLE FROM FORMATTING DIALOG BOX

Let's take a closer look at the Create New Style from Formatting dialog box:

Create New Style from Formatti	ng	?	Х
Properties			
<u>N</u> ame:	Style1		
Style <u>t</u> ype:	Paragraph		\sim
Style <u>b</u> ased on:	¶ Normal		\sim
Style for following paragraph:	¶ Style1		\sim
Formatting			
Calibri (Body) 🗸 11 🗸	B I U Automatic V 2		
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At the **top of the dialog (1)**, you can enter a name and choose a type for the style (character, paragraph, linked, etc.). You can also choose the style that it is based on and the style for the following paragraph.

In the next section of the dialog, you can customize **font formatting (2)** and **set paragraph options (3)**. For more advanced options, click the **Format button (4)** and choose a category to modify. The appropriate dialog 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. When you are finished, click OK to create the style.

STYLE MODIFICATION OPTIONS

To modify a style, right-click it in the Styles pane or the Styles gallery:

		Styles	- ×
		Clear All	
		Normal	T
		Default Paragraph Fo	nt a
		No Spacing	па
		Heading 1	-
	U <u>p</u> date He	ading 1 to Match Selection	on
A	Modify		
	Select All 2	Instance(s)	
	Clear Form	latting of 2 Instance(s)	
	<u>D</u> elete Hea	ding 1	
	Remove fr	om Style <u>G</u> allery	
		Strong	a
		Quote	<u>¶a</u>
		Intense Quote	<u>¶a</u>
		Subtle Reference	a
		Intense Reference	a
		Book Title	a
		Show Preview	
		Disable Linked Style	s
			-
		Ma Ma Ma	Options

These options are fairly self-explanatory, allowing you to modify, select, and delete the style in question. Note that built-in styles cannot be deleted.

The Modify command will open the Modify Style dialog box, which works in exactly the same way as the Create New Style from Formatting dialog box that we looked at earlier:



Assigning Keyboard Shortcuts to Styles

You can assign a keyboard shortcut to a style when creating or modifying it. To begin, click the Format button and click "Shortcut key:"

moully style			?	×
Properties				
<u>N</u> ame:	Heading 1			
Style type:	Linked (paragraph and character)			\sim
Style <u>b</u> ased on:	¶ Normal			\sim
Style for following paragrap	h: ¶ Normal			\sim
Formatting				
Calibri Light (Heac 🗸 14 🗸	/ B I U	\sim		
	= = = ‡≣ *≣ €	→ Ξ		
30-Second Pitch Following Paragraph Following Following Paragraph Following Following Paragraph Following Following Paragraph Following Following Paragraph Following Following Paragraph Following Fort: (Default) +Headings (C Before: 24 pt After: 0 pt, Keep with new gallery, Priority: 10	Paragraph Following Paragraph Following Paragraph Paragraph Following Paragraph Following Paragraph Paragraph Following Paragraph Following Paragraph Paragraph Following Paragraph Following Paragraph Calibri Light), 14 pt, Bold, Font color: Ac dt, Keep lines together, Level 1, Style: Lir	Following Paragrap Following Paragrap Following Paragrap Following Paragrap Following Paragrap cent 1, Space iked, Show in t	հ հ հ հ h h	^
Add to the styles gallery				
Only in this document) New documents based on this templa	te OK	Can	el
Only in this <u>d</u> ocument Format Fort.) New documents based on this templa	OK	Cano	el
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The Customize Keyboard dialog box will open, with the appropriate style selected. Click inside the "Press new shortcut key" field:

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Now, press the keys that you want to assign to this heading. They will be shown in the selected field. You will also see what command this shortcut sequence is assigned to, if any:

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Click Assign and then click Close to complete the process.

Note that if you open this dialog box and shortcut keys have already been assigned to the style in question, you can select the sequence from the "Current keys" section and click Remove to turn the shortcut key sequence off:

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ACTIVITY 2-1

Creating and Modifying Text Styles

In this activity, you will view, modify, and create styles in a document.

1. Open Microsoft Word 2016 and open Activity 2-1:



2. Click the option button in the Styles group on the Home tab to open the Styles task pane:



(It does not matter where the Styles task pane is positioned as long as you can fully see it. If necessary, you can move and resize the pane.)

3. Check the Show Preview checkbox in the Styles task pane so that we can see what each style looks like:

(If this box is already checked, skip to the next step.)


4. There is a duplicate style in this list. Right-click the Sub-Title style and click Delete Sub-Title:



5. Click Yes to confirm the operation:



6. Now let's create a new style. Double-click in the header of the document and select its text:



7. Click the New Style button in the Styles task pane:

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8. Type "Course Name" for the style name. Ensure that the "Style type" is set to Paragraph and that the style is based on Normal. The "Style for following paragraph" menu should also be set to "Course Name:"

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9. Change the font face to Franklin Gothic Heavy:

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11. Apply an italic effect:

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12. Finally, click the color menu and choose any theme color in the top row of the palette:

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13. Click Format \rightarrow Font:

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14. This will open the Font dialog. Click the Advanced tab:

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Preview — Connecting w This is a TrueType font. This font will b	ith Others e used on both printer	and scree

(If the Advanced tab is already displayed, skip to the next step.)

15. Click the Spacing drop-down menu and click Condensed. Then, click OK:

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16. Click OK in the Create New Style from Formatting dialog box to create your style:

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17. The style will be applied to the selected text and you will see it in the Styles task pane:

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18. Close Header and Footer view:

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19. Save your document as Activity 2-1 Complete. Close Microsoft Word 2016 to complete this activity.

TOPIC B: Create Custom List or Table Styles

In addition to text styles, you can also create styles for lists and tables. These styles coordinate with text styles, as well as your document's theme, to create a consistent, professional design.

Topic Objectives

In this topic, you will learn:

- How to create list styles
- How to create table styles

TOOLS FOR LIST STYLES

To create a new list style, click Home \rightarrow Multilevel List \rightarrow Define New List Style:

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The Define New List Style dialog box will open:

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Set your options and click OK to create the new style:

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Once you have defined a style, it will appear in the Multilevel List drop-down menu:

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TOOLS FOR TABLE STYLES

You can also create a style for tables. To begin, select any table to open the Table Tools contextual tabs. Then, click Table Tools – Design \rightarrow More arrow in the Table Styles group \rightarrow New Table Style:

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(You can also open the Create New Style from Formatting dialog from the Styles task pane and choose Table from the "Style type" menu.)

The Create New Style from Formatting dialog will open, ready to create a new table style:

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Set your options and click OK to create the new style:

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The style will be added to the Table Styles gallery, where it can be applied and modified like any other style:

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				S	ales Summa	ry					

ACTIVITY 2-2

Creating Custom List and Table Styles

In this activity, you will customize a document by creating a table style and a list style.

1. Open Microsoft Word 2016 and open Activity 2-2:



2. First, let's spruce up the table. Select the table in the document:

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	10:30-12:00	First Impressions	
	12:00-1:00	Lunch	
	1:00-1:45	Non-Verbal Communication Body Language Gestures	
	1:45-3:45	Verbal and Written Communication On the Phone In Person Via E-Mail and Text	
	3:45-4:15	Role Play	
	4:15-4:30	Workshop Wrap-Up	
Bendard Manual 72			R

3. Click the Table Tools – Design tab and click the More arrow in the Table Styles group:

H	- رې	Q	÷			Activity 2-	-2 - Word			Table	Tools	
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🗹 Bande	ed Rows	E	Banded Colu	mns								
	Table S	tyle O	ptions					Table St	yles			13

4. Click New Table Style at the bottom of the expanded gallery:

List Tables			
Modify Tabl	e Style		
New Table S	tyle		ا

5. The Create New Style from Formatting dialog box will open. Enter "Course Agenda" in the Name text box:

Create New Style	from Formatting				?	Х			
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6. Ensure that the "Apply formatting to" menu says "Whole table." Then, increase the font size to 12:

Create New Style from Format	ting			?	×
Properties					
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Style <u>t</u> ype:	Table				\sim
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7. Click the Borders menu and click Outside Borders:

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<u></u>		Z	Diagonal <u>U</u> p Bord	ler	
F <u>o</u> rmat ▼			OK	Car	icel

This will apply a border only to the outside of the table.

8. Now let's create banded rows. Click the "Apply formatting to" menu and click "Odd banded rows:"

Cre	ate New Style	from Formatti	ng			?	×
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9. Click the Fill Color menu and click "Blue-Gray, Accent 4, Lighter 60%:"

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10. Click OK to create the style:

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11. Now, with the table still selected, click the new style on the Table Tools – Design tab to apply it:

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	Connecting with Others: A One-	Day Sensitur for Socress	
		Course Agenda	
	8:20-0:00 Course C	Diverview and Introductions	
	9:00-10:30 What Ini Appe Simil Com Recip	fluences People in Forming Relationships? arance arity plementarity rocity	
	10:30-12:00 First Imp	pressions	
	12:00-1:00 Lunch		
	1:00-1:45 Non-Ver Body Gesti	bal Communication Language ares	
	1:45-3:45 Verbal au On ti In Pe Via E	nd Written Communication he Phone rson -Mail and Text	
	3:45-4:15 Role Play	<i>t</i>	
	4:15-4:30 Worksho	op Wrap-Up	
Base 1 of 1 _ 47 of Blowerds _ 12			a

(You may need to browse through the gallery using the arrows on its right-hand side.)

12. Review the formatting changes that have been applied to the table:

8:30-9:00	Course Overview and Introductions
9:00-10:30	What Influences People in Forming Relationships?
	Appearance
	Similarity
	Complementarity
	Reciprocity
10:30-12:00	First Impressions
12:00-1:00	Lunch
1:00-1:45	Non-Verbal Communication
	Body Language
	Gestures
1:45-3:45	Verbal and Written Communication
	On the Phone
	In Person
	Via E-Mail and Text
3:45-4:15	Role Play
4:15-4:30	Workshop Wrap-Up

13. Now let's format the list inside the table. Select the text in the second column and click Home → Multilevel List → Define New List Style:

	Activity 2-2 - Word	Table Tools		• – • ×
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14. Enter "Course Sessions" in the Name text box:

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15. By default, the first level of numbering will be a numeral with a closing parenthesis. This is fine, so let's change the next level. Click the "Apply formatting to" menu and choose "2nd level:"

Define New List Style		?	\times
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<u>N</u> ame:	Course Sessions		
Style type:	List		\sim
Formatting			
<u>S</u> tart at:	1		
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16. Click the drop-down arrow next to the Bullets command and choose the diamond bullet:

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17. Click OK to create the style:

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Style type:	List		\sim
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18. Next, select the sub-points for the 9 a.m. session and the 1:45 p.m. session. Click Home \rightarrow Increase Indent:

Home Insert Design Layout References	2-Word Table Tools Mailings Review View Design Layout Q Tell me what you want to do	œ	– □ X Sign in Ø Share
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7	Course Agenda		
8: 9:0	o-9:00 1) Course Overview and Introductions 2) What Influences People in Forming Relationships? 3) Appearance 4) Similarity 5) Complementarity 6) Reciprocity		
10: 12: 1:0	30-12:00 7) First Impressions boo-1:00 8) Lunch 0-1:45 9) Non-Verbal Communication 10) Body Language 10) 10) Gestures 10)		
314	5:3:45 12) Verbal and Written Communication 13) On the Phone 14) In Person 15) Via E-Mail and Text		
3:4 4:1	5 4 :35 16) Role Play 5:4:30 17) Workshop Wrap-Up		

(To select two separate sets of text, hold down the Ctrl key when selecting the second set.)

19. The second level of your list style will be applied:

8:30-9:00	1) Course Overview and Introductions
9:00-10:30	2) What Influences People in Forming Relationships?
	 Appearance
	♦ Similarity
	 Complementarity
	Reciprocity
10:30-12:00	3) First Impressions
12:00-1:00	4) Lunch
1:00-1:45	5) Non-Verbal Communication
	6) Body Language
	7) Gestures
1:45-3:45	8) Verbal and Written Communication
	 On the Phone
	♦ In Person
	 Via E-Mail and Text
3:45-4:15	9) Role Play
4:15-4:30	10) Workshop Wrap-Up

20. Save your document as Activity 2-2 Complete. Close Microsoft Word 2016 to complete this activity.

TOPIC C: Apply and Customize Document Themes

Themes are a combination of preset style sets, colors, fonts, and effects that are tied to the styles that we discussed earlier. As long as the document has been formatted with styles, you can change the look of the entire document with just a few clicks. In this topic, you will learn how to apply and customize themes.

Topic Objectives

In this topic, you will learn:

- How to apply document themes and style sets
- How to create custom style sets
- How to use the Document Formatting group on the Design tab
- How to create custom color and font schemes
- How to save and access custom themes

APPLYING DOCUMENT THEMES

To change the document's theme, click Design \rightarrow Themes:

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File	Home Insert	Design Layout References Mailings Review View 🖓 Tell me what you want to do	Sign in 🔉 Share
Aa Themes	Title TITLE	International Title Title	Watermark Page Page - Color - Borders Page Background
Page 3 of	9 281 words 3	Business Overview ZoomFoods will prepare and distribute pre-packaged, frozen, gournet meals that are sold in grocery stores. Consumers can then purchase the meals and reheat them at home. To be the world leader in healthy, high-quality, pre- packaged meal solutions.	

This will show a gallery of themes. As you mouse over each thumbnail in this gallery, you will see a preview applied to your document (if it has theme elements such as page backgrounds, headers, styles, or diagrams). Click the new theme to apply it:



Default Theme

The default theme for new documents in Microsoft Word 2016 is Office. You can customize the styles offered by this theme by choosing a new style set from one of the 17 default options:

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You can find this gallery in the Document Formatting group of the Design tab.

CHANGING THE STYLE SET

In Microsoft Office Word 2016, there are 17 style sets to choose from. Each of these style sets includes different styles so that you can keep the current look of the theme, but customize the appearance of text.

To change your style set, click the Design tab and click a thumbnail from the gallery in the Document Formatting group:

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Like other galleries we have looked at, you can use the up and down arrows to browse through the styles, or click the More arrow to view all style sets.

As you move your cursor over each style set, you will see a preview applied to your document:



In addition, a document can only have one style set applied to it at a time, although you can change this set whenever you want.

CREATING CUSTOM STYLE SETS

If you have created custom styles, you can save your current style set. To begin, click the More arrow in the Document Formatting gallery on the Design tab:

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Then, click "Save as a New Style Set:"

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(Notice that you can reset the current style set with this menu as well.)

The "Save as a New Style Set" dialog box will open. Enter the name and click Save. Do not modify any other settings:

Save as a New Style Set					
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The style set will now appear in the Document Formatting gallery in a special Custom section:

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If a style set is no longer needed, you can delete it by right-clicking on it and clicking Delete:

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THE DOCUMENT FORMATTING GROUP

Next to the Document Formatting gallery, you will see menus to customize the colors, fonts, spacing, and effects of the current theme:

	5 • ()	÷							ZoomFood	ls - Word					
File	Home	Insert	Design	Layout Rel	ferences	Mailings	Review	View 🖓	Tell me what y	ou want to de	o				
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Click a menu and choose the desired option:



CREATING CUSTOM COLOR SCHEMES

To create a custom color scheme, click Design \rightarrow Colors \rightarrow Customize Colors:

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File	Home	Insert	Design	Layout R	eferences	Mailings	Review	View Q	Tell me what y	you want to d	lo					
Aa Themes	Title HEADEG1 To the care the for palence in the back of an effective theorem is the forward that if year theorem is the forward the forward the forward the forward the forward that if year the forward the forward the forward the forward the forward the forward the forward the forward the forward the forward the forw	TITLE Heading 1 Material and an and and and feature and and an and and feature and and and and and feature and an address of the	The Hades 1 In the least of the product of the first interval of the product of the product of the first interval of the product of the product of the first interval of the product of the product of the first interval of the product of the product of the first interval of the product of the product of the first interval of the product of the product of the first interval of the product of the product of the product of the first interval of the product of the product of the product of the first interval of the product of the product of the product of the product of the first interval of the product of the pr	Title	TITLE ILACING 1 Indexed the frequencies and frequencies of the second second second at the second second second second frequencies frequencies and second frequencies of the second second second second frequencies of the second second second second frequencies of the second second second second second frequencies of the second second second second second second second frequencies of the second s	Title HEADEG1 for dis location of the address include the overlap of the ove	Title 1. Houses 1 Minister Angelmenter Angelmenter Angelmenter Angelmenter gehinner	Title Honing 1 In data kan ki da phononia Indonesi	Tible Fraing 1 Distances in Engelineschaft with ensure in Engelineschaft with ensure in Engelineschaft with ensure in Engelineschaft heter state in Engelineschaften in Engelineschaften in Engelineschaften in Engelineschaften i	TITLE Heading 1	TITU Houses 1 for an approximation for any phone scattering to be any phone scattering to be any phone scattering to be any phone scattering to be	Title Hudfig 1 bitransition and an additional from bitransition and additional from bitransition and additional from bitransition and additional from bitransition addition addition addited bitransition addition addition	Colors Font	Pa Eff S	ragraph Spacing ~ fects ~ t as Default	W
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The Create New Theme Colors dialog box will open:

Create New Theme Colors		? ×
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Text/Background - Dark 1 📃 🔻	Text	Text
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Name: Custom 1]	
<u>R</u> eset	<u>S</u> ave	Cancel

On the left-hand side, you can choose a **color for each aspect (1)** of the theme. A **preview (2)** will be shown on the right-hand side. At the bottom, you can enter a **name (3)** for the custom scheme.

Click Save when you have set your options:

Create New Theme Colors			?	×
Theme colors		Sample		
Text/Background - Dark 1	-	Text	Text	11
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Your custom color scheme will now be applied and will be available from the Colors menu. Notice its impact on the available style sets:



CREATING CUSTOM FONT SCHEMES

The Fonts menu also contains a command to create a custom scheme:

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File	Home	Insert	Design	Layout	References	Mailings	Review	View S	Tell me wha	t you want to d	lo					
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The Customize Fonts command will open the Create New Theme Fonts dialog box:

Create New Theme Fonts		?	×
<u>H</u> eading font: Calibri Light	Sample Heading		~
<u>B</u> ody font: Calibri	~	Body text body text body text. Body text body text.	~
Name: Custom 1		Save	Cancel
		<u> </u>	

Here, you can choose a heading and body font, as well as enter a name for your new theme. Click Save once you have entered your settings:

Create New Theme Fonts		?	×
<u>H</u> eading font: Bradley Hand ITC	~	Sample Heading	~
<u>B</u> ody font: Curlz MT	\sim	Body text body text body text. Body text body text.	~
<u>N</u> ame: Fire			
		<u>Save</u> Car	ncel

Your custom font scheme will now be applied and will be available from the Fonts menu. Notice its impact on the available style sets:



SAVING CUSTOM THEMES

Once you have customized the color, fonts, and/or effects settings for a theme, you can save those settings as your own custom theme. To begin, click Design \rightarrow Themes \rightarrow Save Current Theme:



Enter the file name and click Save.	Do not modify any other settings:
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Save Current Theme X						
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👆 Downloads	* Theme Effects	7/3/2015 10:28 AM	File folder			
🔮 Documents	* Theme Fonts	9/17/2015 9:36 AM	File folder			
E Pictures	*					
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Hide Folders				Tools 👻	Save Cance	

The theme will now be available in the Themes menu for all future documents:

If you have changed the file location, you can locate it using the "Browse for Themes" command in this menu.



ACTIVITY 2-3 Applying and Customizing Document Themes

In this activity, you will customize and save a document theme.

1. Open Microsoft Word 2016 and open Activity 2-3:



2. First, let's change the color scheme to something a bit more visually appealing. Click Design \rightarrow Colors \rightarrow Blue Warm:



3. The color change will be applied to the document:

B 5.0 ·		Activity 2-3 - Word	100 - D X
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There is a second secon	TLE The Tile	The The TITLE THAT THE THE THE THE THE THE THE THE THE TH	Watermark Page Page
		Document Hormatting	Page background
	Connecting with Others	Course Agendal	
		Course Agenaa	
	8:30-9:00 1.	Course Overview and Introductions	
	9:00-10:30 2.	Appearance Similarity Complementarity Reciprocity	
	10:30-12:00 3.	First Impressions	
	12:00-1:00 4.	Lunch	
	1:00-1:45 5. 6. 7.	Non-Verbal Communication Body Language Gestures	
	1:45-3:45 8.	Verbal and Written Communication 1. On the Phone 2. In Person 3. Via E-Mail and Text	
	3:45-4:15 9.	Role Play	
	4:15-4:30 10.	Workshop Wrap-Up	
Page 1 of 2 372 words []		14 M	15 - 4 + 126%

4. Now, let's create a new font scheme. Click Design \rightarrow Fonts \rightarrow Customize Fonts:

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File	Home	Insert	Design I	Layout R	eferences	Mailings	Review	View 🖓	Tell me what y	ou want to d	0						
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5. The Create New Theme Fonts dialog box will open. Click the "Heading font" menu and click Calibri Light:

Create New Theme Fonts	?	×
Heading font:	Sample	_
Calisto MT	✓ Heading	~
∓ Broadway	v text body text body text.	
🕆 Bruch Script M7		
™r Calibri		
🕆 Calibri Light	<u>Save</u> Can	cel
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₽ Calisto MT	~	

6. Click the "Body font" menu and click Candara:

Create New Theme Fonts	? ×
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Calibri Light	🔟 Heading 📃 🔨
Body font:	Body text body text body text.
Constantia	> Body text body text.
👁 Candara	
T CASTELLAR	Candara <u>S</u> ave Cancel
™ Centaur	
T Century	
₱ Century Gothic	
₱ Century Schoolbook	~

7. Type "Course Material" in the Name box and click Save:

Create New Theme Fonts	? ×
Heading font: Calibri Light ✓ Body font: Candara ✓	Sample Heading Body text body text. Body text body text.
<u>N</u> ame: Course Material	<u>Save</u> Cancel
8. The new font scheme will be saved and applied:

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File Home	Insert Design				Sign in & Share
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		0	onnecting with Others	Course Agenda	
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		9:00	-10:30 2.	What Influences People in Forming Relationships? 1. Appearance 2. Similarity 3. Complementarity 4. Reciprocity	
		10:3	0-12:00 3.	First Impressions	
		1:00	-1:45 5. 6. 7.	Non-Verbal Communication Body Language Gestures	
		1:45	- 3:45 8.	Verbal and Written Communication 1. On the Phone 2. In Person 3. Via E-Mail and Text	
		3:45	-4:15 9.	Role Play	
		4:15	-4:30 10.	Workshop Wrap-Up	
Page 1 of 2 372 we	irds CR				15 · · · · · · · · · · · · · · · · · · ·

9. Now let's customize the style set. Click the "Lines (Distinctive)" style set from the Document Formatting gallery on the Design tab. Observe the changes to the document:

8	5 •0 =						Activity 2-3 - Word	œ − □ ×
File	Home Insert	Design Løyr	out References	Mailings	Review	View Q	Tell me what you want to do	Sign in 🔉 Share
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			10:3	0-12:00	3.	First	Impressions	
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Page 1 of	2 572 words []?		1:45	-3:45	8.	Verb 1. 2. 3.	al and Written Communication On the Phone In Person Via E-Mail and Text	10 15 - 4 + 1205

(You may need to browse through the gallery using the up and down arrows on its righthand side to find this style set.) **10.** Now we can save the theme. Click Design \rightarrow Themes \rightarrow Save Current Theme:



11. Enter "Activity 2-3 Complete" as the file name in the Save Current Theme dialog. Do not change any other settings. Click Save:

Save Current Then	ne						Х
$\leftarrow \rightarrow \vee \uparrow$	« AppData > Roaming > Microsoft > Templates	> Document Themes >		v ē	Search Document	Themes	9
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File name:	Activity 2-3 Complete						~
Save as type:	Office Theme						~
🔿 Hide Folders				Tools 🔻	Save	Cancel	

12. Click Design \rightarrow Themes to confirm that your theme is now available from the menu:

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Themes	TITLE TITLE	A, the galaxies is taken basis of para desamenta famili of para desamenta ang galakiris is kinen taken of para desamenta same galakiris is kinen taken same same same same same same same same same same same same same same same	Title Heading 1 for handing 1 for handing of the constraints of the heading of the constraints of the
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Aa Celestial	Aa Circuit	Aa Damask	Aa Depth
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Browse	for Themes Irrent Theme		

13. Save your document as Activity 2-3 Complete. Close Microsoft Word 2016 to complete this activity.

Summary

In this lesson, we learned about using text, list, and table styles to keep documents organized and consistent. We learned about how you can use styles in conjunction with themes and schemes to create the right design for every document. Finally, we learned how to customize color schemes, font schemes, style sets, and document themes to further modify style and design options.

REVIEW QUESTIONS

- 1. What is the command sequence to save a custom theme?
- 2. How do you assign a keyboard shortcut to a style?
- 3. What is the command sequence to create a new list style?
- 4. What type of style contains both a paragraph style and a character style?
- 5. How do you modify a style's settings?

LESSON 3: USING IMAGES IN A DOCUMENT

Lesson Objectives

In this lesson you will learn how to:

- Resize an image
- Adjust image appearance
- Integrate pictures and text
- Insert and format screenshots
- Add videos to a document

TOPIC A: Resize an Image

Often, images that you add to your Microsoft Word documents will need to be resized and/or cropped. In this topic, you will learn some different techniques for resizing and reshaping images.

Topic Objectives

In this topic, you will learn:

- How to resize an image
- How to crop images

RESIZING OPTIONS

To resize a picture, first click it to select it. Then, click and drag any of the handles to resize the photo in that direction. As you drag the handles, you will see the photo become larger or smaller, depending on the direction that you drag in:



You can also enter exact dimensions in the Size group of the Picture Tools – Format tab:

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			es mailings	Review 1	View	Format			Sign in 🔉 Share
Remove Background	ections Color Artist	Compress Pictures			2		Picture Border → Picture Effects → Picture Effects → Picture Layout →	Position * Text * Selection Pane * Align * Send Backward * Coup * * Group * * Rotate *	Image: Crop Image: Height: 2.88° Image: Display the i

For advanced resizing options, click the option button in the Size group or right-click the image and click "Size and Position:"



Either command will open the Size tab of the Layout dialog, offering advanced sizing and scaling options:

Layout	?	×
Position Text Wrapping Size		
Height		
● Absolut <u>e</u> 2.88 [*]		
Relative relative to Margin	\sim	
Width		
● A <u>b</u> solute 3.46 ⁺		
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Scale		
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Height: 5.42" Width: 6.5"		
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CROPPING IMAGES

Microsoft Word also provides tools to remove areas of your photo. To start, click the picture to select it. Then click Picture Tools – Format \rightarrow Crop:

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File		Design		References	Mailings	View	Format	Q Tell me what you want to do					R ₽	hare
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	,	djust					Picture	itales	5	Arrange	Size		5	~

Now, crop handles will appear on each side of the image:



Click and drag these handles to remove part of the photo, like this:



Cropping Options

If you click the drop-down arrow on the Crop command on the Picture Tools – Format tab, you will see advanced cropping options:



The options are as follows:

- **Crop:** Shows handles for simple cropping, which we just looked at.
- Crop to Shape: Allows you to pick a shape for cropping.
- Aspect Ratio: Crop a picture for a particular height/width ratio.
- Fill: Resize a picture so that the original area is filled.
- Fit: Make all picture content fit inside the cropped area.

Астіvіту 3-1

Resizing an Image

Imagine that you work for a graphic design company. One of the managers has put together a simple portfolio, but they need your help with arranging and formatting the images in the document. In this activity, you will begin that task.

1. Open Microsoft Word 2016 and open Activity 3-1:



2. Scroll to the second page of the document. Click the first logo to select it:



3. Click the Picture Tools – Format tab:

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File	Home	Inser	t Design	Layout	References	Mailings	Review	View	Format	Tell	me what you	want to do	
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c	lipboard	5		Font		6	Paragr	aph	5				

4. Type "2.5" in the Width field and press Enter:

Picture Tools	Activity 3-1 - Word						Ŧ	-		×
Format								Sign in	Яs	hare
		Picture Border → Q Picture Effects → ₹ Picture Layout →	Position Wr	Bring Forward	· I I Group - - III Group - ∠N Rotate -	Crop	🚺 Height:	2.96" 2.5	*	
	Picture Styles	G.		Arrange			Size		G.	~

5. Click the second logo on the page:



6. Click and drag the bottom right-hand corner handle up and inwards, like this:



7. Now, click the final logo to select it:



8. Click Picture Tools – Format \rightarrow Crop \rightarrow Crop to Shape \rightarrow Rounded Rectangle:

Actury 1001 Actury 51- Word Image: Comparison of the second of the						
Format Q Tall me what you want to do Sign In Q Image: Comparison of the company of	Picture Too	ols Activity 3-1 - Word				
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9. Click the Crop command to activate the feature:



- Image: Section of the section of th
- **10.** Click and drag the middle right-hand crop handle to remove the text from the image:

11. Click off of the image to complete the crop. Now, click and drag the image upwards until it is just above the page border. Continue dragging to the right until you see the green guideline shown below. Release your mouse button to position the image here:



12. Save your document as Activity 3-1 Complete and close Microsoft Word 2016.

TOPIC B: Adjust Image Appearance

Although Microsoft Word is not designed to be a photo editing program, it does contain basic tools to modify the appearance of an image. In this lesson, we will introduce you to some of these options, which are located on the Picture Tools – Format tab.

Topic Objectives

In this topic, you will learn:

- About the commands in the Adjust group on the Picture Tools Format tab
- How to correct an image
- How to recolor an image
- How to apply artistic effects to an image
- How to compress an image
- How to remove the background of an image
- How to apply styles to an image

THE ADJUST GROUP

You've seen that when you add any type of picture to a document, the Picture Tools – Format tab will open:



Let's review the commands in the Adjust group, which will be the focus of this topic.

Remove Background	Opens the Background Removal tab, which provides tools to remove parts of the picture's background.
Corrections	Opens a menu with commands to sharpen or soften the picture, or change brightness and contrast. The Picture Corrections Options command at the bottom of the menu opens the related area of the Format Picture task pane.
Color	Opens a menu with commands to adjust the saturation and tone of the image or recolor the picture. You can also make a particular color in the image transparent. The Picture Color Options command at the bottom of the menu opens the related area of the Format Picture task pane.
Artistic Effects -	Opens a menu with thumbnails of artistic effects that can be applied to the photo. The Artistic Effects Options command at the bottom of the menu opens the related area of the Format Picture task pane.
ِلَّا ِ Compress Pictures	Opens the Compress Pictures dialog, where you can set the target resolution in pixels per inch for the current photo or all photos.
🚰 Change Picture	Swap the current photo for another photo, preserving the size, location, and some formatting options.
Reset Picture 🔹	Remove any formatting applied to the picture. Or, click the drop-down arrow to reset both formatting and size.

CORRECTIONS OPTIONS

The first command that we will explore is the Corrections menu in the Adjust group of the Picture Tools – Format tab:



Here, you can choose from a variety of presets to sharpen or soften the picture, and to adjust the brightness and contrast. The current presets will be highlighted, as shown above.

To manually set options for each of these categories, click the Picture Corrections Options command at the bottom of the menu. This will open the Format Picture task pane to the Picture Corrections sub-category of the Picture category:



Notice that you can choose a preset for each category or use the slider to manually set each option. There is also a Reset command that will become available after you make changes.

Picture Contrast and Picture Brightness

Contrast refers to the difference between tones in an image. **Brightness** refers to the amount of white in the image.

COLOR OPTIONS

Next, let's look at the Color menu, also found in the Adjust group of the Picture Tools – Format tab:



Once again, we have several categories of presets, including Color Saturation, Color Tone, and Recolor. You can click any of the presets to apply them; the current presets have borders surrounding them.

To recolor the picture with a color not shown here, click More Variations and choose a colo

日 5· () File Home In	≠ Picture To sert Design Layout References Mailings Review View Forma	ols ZoomFoods - Word Ω Tell me what you want
Remove ackground	Color Artistic • Effects * Reset Picture *	
	Color Saturation	e Styles
	200M 200M 200M 200M 200M 200M 200M	
	Color Tone	
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	🗞 More Variations	Theme Colors
	월 Set Transparent Color 나중	
	Picture <u>Color</u> Options	Standard Colors
		🚷 More Colors

The next option in the Color menu, **Set Transparent Color**, will allow you to mark a color to be made transparent for the whole image. Here, we have clicked the Set Transparent Color command and are selecting a shade of gray to be made transparent:



Here are the results:



Finally, you can click the Picture Color Options command at the bottom of the menu to open the Format Picture task pane to the Picture Color sub-category of the Picture category:

Format Picture ▼×
Picture Corrections
Picture Color
Color Saturation
Presets
Saturation - 100% ‡
Color Tone
Pr <u>e</u> sets
Temperature ————————————————————————————————————
Recolor
Reset
⊳Сгор

This task pane provides much finer control over saturation, tone, and color options. You will also find a Reset command to reverse any changes that you have made to the currently selected preset.

ARTISTIC EFFECTS OPTIONS

Finally, the Artistic Effects menu will show you some presets for adding an artistic flair to your picture:

	o - 0	Ŧ							Picture Tools
File	Home In	isert	Design	Layout	References	Mailings	Review	View	Format
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		Adju	Zoon Zoon Zoon Zoon Zoon Zoon Zoon Zoon	ZOOM ZOOM ZOOM ZOOM	tions	ZOOM	COONC -		Picture St

Just click a preset to apply it. Or, click the Artistic Effects Options command at the bottom of the menu to open the Format Picture task pane to the Artistic Effects sub-category of the Effects category:



Here, you will be able to set different options for each effect, or reset the effect to its default appearance.

COMPRESSION TOOLS

Next, let's look at the Compress Pictures command. When you click this command, you will see the following dialog box:

Compress Pictures	?	×
Compression options: Apply only to this picture Delete cropped areas of pictures		
Target output: <u>H</u> D (330 ppi): good quality for high-definitio <u>P</u> rint (220 ppi): excellent quality on most print <u>W</u> eb (150 ppi): good for web pages and propose of the print (96 ppi): minimize document size for states of the print of t	n (HD) di iters and jectors haring	splays screens
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The first option indicates that these options will **apply only to this picture**; uncheck it if you want these settings to apply to all photos in the document. The second option allows Word to **delete cropped areas** of pictures. (If you've finished editing a picture, this is a good way to trim down the size of a file.)

Then, you have options to **set the resolution** of the pictures in the document. Normally, you won't need to change these settings, but they can be useful if you need to reduce a document's size to e-mail it. Once you've set your options, click OK to apply the settings or click Cancel to discard them.

THE BACKGROUND REMOVAL TOOL

Word also features some powerful background removal tools. To start, select a picture, click the Picture Tools – Format tab, and click Remove Background:



This will highlight the background area to be removed in pink and open the Background Removal tab:



You can accept Word's default assessment of what to remove, or you can click Mark Areas to Keep/Mark Areas to Remove and paint the picture. Also note the Delete Mark command. This acts like an eraser so that you can remove marks that you have placed.

Once you have finished, click the Keep Changes command. Here is the final result:



APPLYING PICTURE STYLES

Just as with text, there are a number of pre-defined styles that you can apply to pictures. Just select the image and choose the appropriate thumbnail from the Picture Styles group on the Picture Tools – Format tab.

You will see a preview of the style applied to the photo as you mouse over each thumbnail:



Like other galleries, you can use the arrows to scroll through the available styles, or click the More arrow to view all styles:

H	ა - ი	÷							Picture Tools	ZoomFoods	- Word
File	Home	Insert	Design	Layout	References	Mailings	Review	View	Format	♀ Tell me wha	t you want to
Remove Backgrour	Correcti	ons Color	Artistic	🞑 Compress 🚰 Change Pi 🐿 Reset Picto	icture						
backgroui		Adj	ust								
								٢			
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Last but not least, you can use the menus to the right of the gallery to customize the current style:

B	ნ- თ										Is ZoomFoods - Word
File	Home	Insert	Design	Layout	Reference	es Mai	lings	Review	View	Format	${f Q}$ Tell me what you want to do
Remove Background	Correctio	ons Color	Artistic Effects	🛋 Compress 🚰 Change Pi 🖼 Reset Picto	Pictures icture ure *						Image: Second secon
		Adj	ust							Picture	Styles

ACTIVITY 3-2

Adjusting Image Appearance

In this activity, you will try some different image manipulation techniques on your artist's portfolio.

1. Open Microsoft Word 2016 and open Activity 3-2:



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



3. Click Picture Tools – Format → Color. Choose a color that complements the rest of the title page:



4. Scroll to the second page of the document. Click the second logo:



5. Let's add an effect to this logo to help it stand out. Click Picture Tools – Format → Artistic Effects → Photocopy:



6. Now, hold the Ctrl key and click all three logos to select them:



7. Click the More arrow in the Picture Styles gallery on the Picture Tools – Format tab:

8											Activity 3-2 - Wo		
File	Home	Insert	Design	Layout	References	Mailings	Review	View	Format	Q Tell me who	at you want to do		
Remove	Correctio	ns Color	Artistic	Compress	s Pictures Picture ture +	-					-	\bigcirc	Picture Border * Q Picture Effects * Q. Picture Layout *
background		Adj	ust							Picture Styl	es		6

8. Move your mouse over some different styles to see how they will look. When you are finished, click "Reflected Perspective Right:"



9. Now, let's customize this style. With all three images still selected, click Picture Tools – Format \rightarrow Picture Effects \rightarrow 3-D Rotation \rightarrow 3-D Rotation Options:

⊟ ১ • ৫ ÷	Picture Tools	Activity 3-2 - Word		
File Home Insert Design Layout Refere	nces Mailings Review View Format	Q Tell me what you want to do		
Remove Background Corrections Color Artistic Ffects Adjust		Picture Styles	Picture Border Picture Effects	Test + Constant + Cons
			Shadow >	
			Reflection >	
			Soft Edges	
			Bevel >	
			3-D Rotation >	No Rotation
				Parallel
				ſ 🛩
				Oblique
				24 3iD Retation Ontions

10. The Format Picture task pane will open to the Effects category with both the 3-D Format and 3-D Rotation sub-categories expanded. (If one of these categories is not expanded, click its name to see its options.) Change the value in the Lighting – Angle field to 90:

Format Picto	ure		* X
Shadow			
Reflection			
▷ Glow			
Soft Edges			
▲ 3-D Format			
<u>T</u> op bevel			
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	Wi <u>d</u> th	0 pt	÷
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	<u>S</u> ize	0 pt	÷
Contour			
_ 	<u>S</u> ize	0 pt	÷
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<u>ivi</u> ateriai			
_			
<u>L</u> ighting			
2 •	<u>A</u> ngle	90	÷
<u>R</u> eset			

11. How has this change affected the logos?



12. Close the Format Picture task pane:

Format Pict	ure		~	Close
Shadow			4	
Reflection				
▷ Glow				
Soft Edges				
4 3-D Format				
<u>T</u> op bevel				
	<u>W</u> idth	5 pt	÷	
	<u>H</u> eight	4 pt	÷	
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	Height	0 pt	÷	
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<u>M</u> aterial				
-				
Lighting				
	<u>A</u> ngle	90°	* *	
Reset				

13. Finally, let's discard the crop settings from the last activity for the third logo. Hold the Ctrl key and click the first two logos to de-select them. Then, click Picture Tools – Format → Compress Pictures:



14. Leave the settings at the default and click OK:

Compress Pictures	?	×
Compression options:		
Target output: <u>H</u> D (330 ppi): good quality for high-definition <u>P</u> rint (220 ppi): excellent quality on most print <u>W</u> eb (150 ppi): good for web pages and proje <u>E</u> -mail (96 ppi): minimize document size for sh <u>U</u> se document resolution	n (HD) di ters and ectors aring	splays screens
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15. Save your document as Activity 3-2 Complete and close Microsoft Word 2016.

TOPIC C: Integrate Pictures and Text

Now that we understand how to customize all aspects of an image's appearance, let's look at how to integrate that image with text using tools such as text wrapping and rotation. We'll also look at creating a caption that is integrated with an image.

Topic Objectives

In this topic, you will learn:

- About text wrapping styles in Microsoft Word
- How to change a picture's position on the page
- Techniques for rotating images
- How to add captions to an image

TEXT WRAPPING STYLES

The way that a picture interacts with the text around it is controlled by **text wrapping options**. To change text wrapping, select the picture and click Picture Tools – Format \rightarrow Wrap Text:



You will see a menu of wrapping styles; just click the style that you want to apply. Each option's icon shows a small preview of what the image and text will look like. The icon for the current text wrapping method will be highlighted, and new options will be previewed as you mouse over them. (Note that all styles except "In Line with Text" allow you to drag the image wherever you want on the page.)

A quicker way to access these options is to click the Layout Options button next to a selected image:



The Layout Options mini task pane will then open, allowing you to choose a text wrapping style:



The More Layout Options command in the Wrap Text menu (and the "See more" link in the Layout Options pane) will open the Layout dialog, where you can access advanced text wrapping and position options:

Layout				? ×
Position Text Wra	pping Size			
Wrapping style				
×	×	×	×	Ħ
In line with text	S <u>q</u> uare	<u>T</u> ight	T <u>h</u> rough	T <u>o</u> p and bottom
Behind text	In <u>f</u> ront of text			
Wrap text				
○ Both sides	Left only	🔵 Righ	nt only	Largest only
Distance from text				
Top 0"		Left	0.13"	
Bottom 0"		Right	0.13"	
			ОК	Cancel

Configuring Wrap Points

To customize exactly how text wraps around the image, click Picture Tools – Format \rightarrow Wrap Text \rightarrow Edit Wrap Points:

.	,	G	÷								Picture To	Z	ZoomFoods	- Word				
File	Hom	ie Ir	isert	Design	Layout	Reference	s Mail	ings	Review	View	Format	Q	Tell me wha					
Remove Background	Cor	rrections	Color	Artistic Effects *	🔄 Compress 🚰 Change Pi 🔁 Reset Pict	icture ure *									Picture Border Q Picture Effects B Picture Layout	Position	Wrap Text	Bring Forward *
			Adju	ıst							Picture	Styles				r _a	Δ.	In Line with Text
																	1	Square
																	~	Tight
																	0	T <u>h</u> rough
																	~	Top and Bottom
																	ā	Behin <u>d</u> Text
																	n	In Front of Text
																	6	Edit Wrap Points
																	~	Move with Text
																		Eix Position on Page
																	Π	More Layout Options
																		Set as Default Layout

The image will now be surrounded with a red border and black resize handles. Click and drag these handles to modify the wrap point:

Business Overview



ZoomFoods will prepare and distribute prepackaged, frozen, gourmet meals that are sold in grocery stores. Consumers can then purchase the meals and reheat them at home.

Here are the results of this change:

Business Overview



ZoomFoods will prepare and distribute prepackaged, frozen, gourmet meals that are sold in grocery stores. Consumers can then purchase the meals and reheat them at home.

PICTURE POSITIONING OPTIONS

You can also use the Position menu on the Picture Tools - Format tab to choose where to place the picture on the page and have Word automatically set text wrapping. Once again, each icon will show you the related settings, and you will see a preview as you mouse over each option:



The More Layout Options command will open the Position tab of the Layout dialog:

Text Wrapping Size Horizontal	Column Margin Column Page								
Horizontal Alignment Left relative to Book layout Inside of Absolute position 0" to the right of Relative position + relative to Vertical Top relative to	Column Margin Column Page								
Alignment Left ✓ relative to Book layout Inside of Absolute position 0° ↓ to the right of Relative position ↓ relative to Vertical Alignment Top	Column Margin Column Page								
Book layout Inside of Absolute position 0" to the right of Relative position Image: state of the stat	Margin Column Page								
 Absolute position Relative position Vertical Alignment Top relative to 	Column Page								
Relative position relative to Vertical Alignment Top relative to	Page								
Alignment Top relative to									
○ Alignment Top ✓ relative to									
	Page								
Absolute position O below	Paragraph								
Relative position	Page								
Options									
✓ Move object with text ✓ Allow overlap	Allow overlap								
Lock anchor Zayout in table ce	11								

Here you will find options to precisely control the position of this image.

Alignment Guides

When you are moving an object or image in Word 2016, bright green guides will appear when the object is in line with other objects or elements. For example, the center of this image is in line with the center of the page:



This feature can be enabled or disabled by clicking Picture Tools – Format \rightarrow Align \rightarrow Use Alignment Guides:



ROTATING IMAGES

To rotate a picture, click and drag the circular handle at the top of the image:



Or, select a picture, click Picture Tools – Format \rightarrow Rotate, and choose a rotation option:

⊟ ಕ್.್ :		
File Home Insert Design Layout References Mailings Review View	Format Q Tell me what you want to do Sign	n in 🔎 Share
Remove Background Corrections Color Attails * Effects * Reset Picture *	Image: Second	0
Adjust	Picture Styles 74 Arrange Arrange	5 A
	▲C. Rotate Left 90"	
	4 Flip Vertical	
	▲ Flip <u>H</u> orizontal	
	III More Rotation Options	

You can also see options in this menu to flip the picture vertically or horizontally.
Layout			?	×
Position Text Wrapping Size				
Height				
Absolut <u>e</u> 2.5*		-		
Relative	relative to	Page	\sim	
Width				
Relative	relative to	Page	\sim	
Rotate				
Rotation: 0°				
Scale				
<u>H</u> eight: 87 %	Width:	87 %		
✓ Lock <u>a</u> spect ratio				
Relative to original picture size				
Original size				
Height: 2.86"	Width:	3.43"		
			Re <u>s</u> et	
		ОК	Cano	el

Here, you can enter a specific degree of rotation in the appropriate field. Then, click OK to apply it.

ADDING CAPTIONS

Captions allow you add text descriptors to visual elements in your document, such as pictures or charts. In addition, they can be used when creating cross-reference links.

To insert a caption, select the image that you would like the caption to be applied to. Then, click References \rightarrow Insert Caption:



The Caption dialog will open. In this dialog, 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.) Click OK to create the caption:

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<u>L</u> abel:	Figure	•		\sim
Position:	Below	selected item		\sim
Exclude	label fro	om caption		
<u>N</u> ew Lab	el	Delete Label	N <u>u</u> mbe	ering
<u>A</u> utoCapti	on	ОК	C:	ancel

The caption will now be applied and the Drawing Tools – Format tab will be available so that you can modify it:

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Астіvіту 3-3

Integrating Pictures and Text

In this activity, you will integrate a new image into the title page of the artistic portfolio.

1. Open Microsoft Word 2016 and open Activity 3-3:



Activity 3-3 Microsoft Word Document 3.98 MB

2. Ensure that your cursor is on the first page of the document. Click Insert \rightarrow Pictures:



3. Browse to your Exercise Files folder. Locate and select the Logo image. Click Insert:



4. The image will be added, but will not be visible due to its position. To fix this, click Picture Tools – Format \rightarrow Position and choose the position shown below:

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Remove Background Controling Color Artistic Deckground Controling Color Artistic Diffects + Sul Reset Picture - Adjust		Zhones Note** Image Shores for the Shore Shores for the Shore Shores for the Shore Shore Shore for the Shore Shore Shore Shore for the Shore Sh
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5. To ensure that the new image stays visible, click Picture Tools – Format \rightarrow Wrap Text \rightarrow In Front of Text:



6. Now, click the rotation handle at the top of the image and drag it slightly to the right, like this:



7. Next, let's add a caption to the other image on the title page. Click it to select it:



8. Click References \rightarrow Insert Caption:

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Table of Contents ×	AB ¹ (i) Insert Endnote AB ¹ Next Footnote Footnote Show Notes	Insert Citation	Manage Sources	Insert Caption	Insert Table o Update Table	f Figures Insert Index Mark Entry

9. The Caption dialog box will open. Check the "Exclude label from caption" box:

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Position:	Below se	elected item		\sim
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<u>A</u> utoCapti	on	OK	Can	icel

10. In the Caption box, type, ": Our award-winning artists hard at work!" Then, click OK:

Caption		? ×
Caption: 1: Our awa Options	ard-winning artists har	d at work!
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<u>N</u> ew Labe	el Delete Label	N <u>u</u> mbering
<u>A</u> utoCapti	on OK	Cancel

11. The caption will be created:



12. Save your document as Activity 3-3 Complete and close Microsoft Word 2016.

TOPIC D: Insert and Format Screenshots

Microsoft Word 2016 also offers the ability to add screenshots (pictures of your computer screen) to documents. In this topic, we will learn all about this tool.

Topic Objectives

In this topic, you will learn:

About the Screenshot tool

THE SCREENSHOT TOOL

Adding a screenshot to a document involves a few steps. To start, make sure that the window that you want to take a picture of is maximized. Then, bring up Microsoft Word. Click to place your cursor in the document at the location where you want the image to be inserted.

Finally, click Insert \rightarrow Screenshot, and click the window that you want to take an image of:



If you do not see the desired window in the list, first minimize all windows. Then, maximize the desired window and maximize Word. Now, click Insert \rightarrow Screenshot \rightarrow Screen Clipping. You will now be able to manually select the portion of the window that you want to take an image of.

With either method, you will be asked if you want to link the image back to the source (if you are capturing an image from a website). We will click Yes for this example:



The image will then be inserted into your document at the position of your cursor:



You can now work with the screenshot as you would any other image.

ACTIVITY 3-4 Inserting and Formatting Screenshots

In this activity, you will create a special sneak peek memo for your artistic portfolio, which is almost complete.

1. Open Microsoft Word 2016 and open Activity 3-4A:



2. Go to the second page of the document. Click View \rightarrow One Page:



3. Now, open Activity 3-4B:



Activity 3-4B Microsoft Word Document 40.5 KB 4. Ensure that your cursor is below the title, but before the final line of text. Click Insert → Screenshot → Screen Clipping:



5. The Activity 3-4A document will re-maximize, with a transparent mask placed around it. Click and drag around the outer edge of the blue page border to capture it:



6. The image will be captured and added to the Activity 3-4B document:



(The size may vary slightly depending on your monitor and window size. If so, that's OK.)

7. Now, let's resize it. Type "6" in the Height field on the Picture Tools – Format tab and press Enter:

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		Picture Border * Q Picture Effects * Picture Layout *	Position	Wrap Text •	Bring Forward - Send Backward	F Align •	Crop	Height:	6 5.92"	•	
Pictu	ure Styles	Fa.			Arrange			Size		G	~

8. Click Home \rightarrow Center to align the image to the middle of the page:



9. Your document should now look like this:



10. Save your document as Activity 3-4 Complete and close Microsoft Word 2016.

Summary

In this lesson, we learned all about working with images in a document. To begin, we covered basic resizing and cropping tasks. We also took a close look at the modifications you can make with the Adjust group, including recoloring, correcting, and compressing an image. The lesson wrapped up with information on integrating pictures and text and adding supplementary items, like screenshots and captions, to a document.

REVIEW QUESTIONS

- 1. Which command on the Picture Tools Format tab allows you to sharpen or soften an image?
- 2. What is the command sequence to add a caption to an image?
- 3. List the steps to add a screenshot to a document.
- 4. What aspects of a picture style can be customized?

LESSON 4: CREATING CUSTOM GRAPHIC ELEMENTS

Lesson Objectives

In this lesson you will learn how to:

- Create text boxes and pull quotes
- Draw shapes
- Add WordArt and drop caps to text
- Create complex illustrations with SmartArt

TOPIC A: Create Text Boxes and Pull Quotes

It's now time to look at some advanced types of graphics. To begin, we will learn about the various types of text boxes that you can add to a Microsoft Word document. We will also explore ways to format and customize text boxes.

Topic Objectives

In this topic, you will learn:

- About the types of text boxes available in Microsoft Word
- How to insert a pre-defined text box
- How to draw a text box from scratch
- About the commands on the Drawing Tools Format tab
- How to apply text box styles
- How to manually format text boxes
- How to add shadow and 3-D effects to a text box
- How to change the direction of text in a text box
- How to save a custom text box to the text box gallery
- How to arrange text boxes

TYPES OF TEXT BOXES

A **text box** is an object that is primarily designed to hold text. However, it can also hold other illustrations, like pictures and shapes. Text boxes are an excellent tool for advanced layout requirements as they enable you to arrange text however you like. Text boxes and the text within them also offer almost unlimited formatting options. As well, they integrate with styles and themes to help create a consistent look throughout the document.

There are several common uses for text boxes which are reflected in Microsoft Word's predesigned gallery. **Pull quotes**, for example, are designed to sit within a block of text, breaking it up and drawing the reader's eye to a key point. **Sidebars** are designed to sit in the margin and provide additional information. Keep this in mind when choosing a pre-defined text box.

INSERTING A TEXT BOX WITH THE TEXT BOX GALLERY

To insert a pre-defined text box, click Insert \rightarrow Text Box and choose the box that you want:

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File Home Insert Design Layout References Mailings	Review View 🛛 Tell me what you want to d	lo	
Cover Blank Page Table Pictures Online Shapes SmartAit Chart Screenhot Pictures Online Shapes SmartAit Chart Screenhot Pictures Illustrations	Store William Online Hyperlink	Bookmark Cross- reference Links Comments Header & Footer	Test Quick WordArt Drop Diste & Time π Ω Box = Parts Cap Object Object Function Symbol
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Note that you can scroll up or down to view the entire list.

Once you click a thumbnail, the text box will be inserted in your document. Now you can click inside the box and type your text:



DRAWING A TEXT BOX

To create a simple text box, click Insert \rightarrow Text Box \rightarrow Draw Text Box:

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Your cursor will turn into a crosshair. Click and drag to create the text box:

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Once you have finished, you can type in the box:

Using Microsoft Office 2016

Video provides a powerful way to help you prove your point. When you click Online Video, you can paste in the embed code for the video you want to add. You can also type a keyword to search online for the video that best fits your document. To make your document look professionally produced, Word provides header, footer, cover page, and text box designs that complement each other.



buttons that show up where you need them. To chango and a button for layout options appears next to it. When you work on a table, click where you want to

add a row or a column, and then click the plus sign.

THE DRAWING TOOLS – FORMAT CONTEXTUAL TAB

The Drawing Tools – Format tab is used for sizing, positioning, and aligning objects like shapes, text boxes, and WordArt:



It contains six groups:

- Insert Shapes group: Includes a gallery of shapes, as well as a menu of shape editing options and a command to draw a simple text box.
- **Shape Styles group:** Customize the appearance of the shape.
- WordArt Styles group: Customize the text in the shape.
- **Text group:** Control different aspects of text in text boxes.
- Arrange group: Arrange shapes and objects.
- **Size group:** Enter specific dimensions for the height and width of the shape.

APPLYING TEXT BOX STYLES

To apply a style to a text box, ensure it is selected. Then, click a thumbnail in the Shape Styles gallery. You will see a preview as you mouse over each thumbnail:



Remember, you can use the up or down arrows to navigate through the gallery, or click the More arrow to view all available styles.

FORMATTING TEXT BOXES

You can use the Shape Styles and WordArt styles groups on the Drawing Tools – Format tab to change the appearance of the text box and its contents:

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	Insert	Shapes					Shape Style	s		G.		WordArt Styles	G.

You can even use the tools on the Home tab and the mini toolbar to format the contents of the text box:

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APPLYING SHADOW AND 3-D EFFECTS

To add a shadow to your text box, click Drawing Tools – Format \rightarrow Shape Effects \rightarrow Shadow, and choose the effect that you want:

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	Insert S	hapes					Shape Styles			Preset	+	WordA	rt Styles
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To add a 3-D effect to your text box, click Drawing Tools – Format \rightarrow Shape Effects \rightarrow 3-D Rotation and choose the rotation style that you want:

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				<u>₿</u> evel →	
				3- <u>D</u> Rotation →	No Rotation
					Parallel
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					Perspective
					Oblique
					3-D Rotation Options

You can also apply a shadow or 3-D effect to the text itself with the Text Effects menu:



CHANGING TEXT DIRECTION

To change the direction of text in a text box, click Drawing Tools – Format, click Text Direction, and choose the desired orientation:

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Insert Shapes	Shape Styles	ra WordArt Styles ra	ABC Horizontal
			B Rotate all text 90°
			Rotate all text 270"
			A Text Direction Options

To modify advanced settings, click Text Direction Options from this menu:

Text Directio	on - Text Box	? ×								
Orientation		Preview								
Te B H	xt Text	The quick brown fox jumps over the lazy dog.								
Apply to:		OK Cancel								

SAVING THE SELECTION TO THE TEXT BOX GALLERY

Once you have customized a text box, you can save it for future use by selecting the box and clicking Insert \rightarrow Text Box \rightarrow Save Selection to Text Box Gallery:

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Now, set your options and click OK:

Create New	Create New Building Block ?								
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Options:	Insert content only	\sim							
	ок с	ancel							

If you choose to save the object in the Building Blocks template, you will be prompted to save the changes the next time you close Microsoft Word. Then, the custom text box will be available in any document.

ARRANGING TEXT BOXES

Once you have text boxes arranged just the way you want them, you can group them so that you can move them as a single unit. (Note that you cannot group text boxes that use "In Line with Text" wrapping.)

To start, select the text boxes to group by holding Ctrl and clicking each text box. Then, click Group \rightarrow Group on the Drawing Tools – Format tab or the right-click menu:

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The text boxes can now be manipulated as one object:



If you want to edit an individual text box, use the Ungroup command on the Drawing Tools – Format tab or the right-click menu.

ACTIVITY 4-1 Creating Text Boxes

In this activity, you will add a text box to the template for an annual report. You will also customize this text box and save it for future use.

1. Open your Exercise Files folder. Find the Activity 4-1 file, right-click it, and click Open:



This will open the template file directly for editing.

2. Scroll to page two of the document. Click anywhere on this page to place your cursor there. Then, click Insert \rightarrow Text Box \rightarrow Austin Sidebar:



3. The "Sidebar Title" placeholder text should be selected. Type, "Check This Out!"



4. Click inside the sample body area of the text box and replace it with the following text: "List the top three accomplishments for the year."



5. Select this text and use the mini toolbar to increase the font size to 14:



6. Now let's make the box a bit more noticeable. De-select the text but make sure your cursor is still inside the text box. Click Drawing Tools – Format → Shape Outline → Gold, Accent 4:

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7. Click Drawing Tools – Format \rightarrow Shape Effects \rightarrow Shadow \rightarrow Inside Diagonal Top Right:

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Insert Shapes		Shape Styles	Preset	WordArt Styles
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				Perspective
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8. With the text box still selected, click Insert \rightarrow Text Box \rightarrow Save Selection to Text Box Gallery:



(If this command is not available, ensure that the outer border of the text box is selected.)

9. In the Create New Building Block dialog, enter "Summary Sidebar" as the name. Ensure that the "Save in" menu says "Activity 4-1" and click OK:

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<u>G</u> allery:	Text Boxes				\sim
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<u>S</u> ave in:	Activity 4-1				\sim
Options:	Insert content on	ly			\sim
		OK	L.	Canc	el

10. Save your document as Activity 4-1 Complete. Close Microsoft Word 2016 to complete this activity.

TOPIC B: Draw Shapes

Shapes are another type of illustration that you can add to a document. These objects can include arrows, callouts, mathematical symbols, and more. In this topic, you will learn how to insert, modify, and format all types of shapes.

Topic Objectives

In this topic, you will learn:

- About shapes in Word
- How to draw a shape
- What types of shapes are available to you
- About the drawing canvas
- How to set wrapping options for shapes
- How to add text to a shape and modify it
- How to add a caption to a shape
- How to format a shape using styles
- How to resize and position shapes

SHAPES IN WORD

A **shape** is a geometric object. It can be a standard shape (like a square or circle) or it can be something more complex (like a flowchart shape).

To add a shape to a document, click the Insert tab and click Shapes. Then, click the shape that you want to draw:



Then, click and drag in the document to create the shape:



You can also single-click to create a shape of default size. With either action, when you release your cursor, the shape will be selected and the Drawing Tools – Format tab will be accessible:



TYPES OF SHAPES

There are nine major categories in the Shapes menu:

- Recently Used Shapes: Contains the most recently used shapes (up to the last 24).
- Lines: Create a variety of lines and plain arrows.
- **Rectangles:** Create a variety of rectangular shapes.
- Basic Shapes: Create basic shapes, such as circles and triangles. Fun shapes like smiley faces are also included here.
- Block Arrows: Create block-style arrows and lines.
- Equation Shapes: Create mathematical shapes.
- Flowchart: Create shapes used in flowcharts, such as decision points and terminators.
- Stars and Banners: Offers 20 different types of these shapes.
- **Callouts:** Annotate other drawings and images.

THE DRAWING CANVAS

A drawing canvas is a container that you can add multiple shapes to. These shapes then behave as one unit. To create one, click Insert \rightarrow Shapes \rightarrow New Drawing Canvas:

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File	Ho	ome	Insert	Design	Layo	out	Reference	s N	lailings	Review
Cover Page ▼	Blank Page	Page Break	Table	Pictures	Online Pictures	Shapes	SmartArt	Chart	Screenshot	👋 Sto
-	Pages		Tables			Rece	ntly Used	Shapes		
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						Lines		ث 1	250	26
						Recta	anales		991	. L. q
						Basic	Shapes			
								7	\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	
						Block	Arrows	,		
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							ew Drawin	ng Canva	35	\searrow

The canvas will now be inserted, ready to accept shapes:

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File Home Inset Design	Layout References Mailings K	evew View Format V Tell me what yo	su want to do		- C Balance	Sign in 📯 Share
O ∆ L L ↔ ↔ · E Draw Text Box	Abc Abc Abc Abc	Abx Abx Abx · Z Shape Outline *	Δ Δ Δ Text Outline -		Group -	Height: 3.5"
6471() V		T 🖓 Shape Effects *	Text Effects -	Test Align Create Position Wrap Bring Direction - Test - Link • Test • Forward	Send Selection - Backward - Pane A Rotate -	Width: 6"
Insert Shapes	Sha	ape Styles ra	WordArt Styles 5	Text	Arrange	Size 15 A
App1#3 90wm6 (3		Using Microsoft O	Diffice 2016	Video, you can do search online for produced. Word her. on then choose the and foundation is focument; downerst a focument; downerst downerest downerst downerst downerst downerst downerst downerst down		

TEXT WRAPPING STYLES

The way that a shape interacts with the text around it is controlled by **text wrapping styles**. To change text wrapping, select the shape and click Drawing Tools – Format \rightarrow Wrap Text:



You will see a menu of wrapping styles. Each option's icon shows a small preview of what the shape and text will look like. The icon for the current text wrapping method will be highlighted, and new options will be previewed as you mouse over them. Note that all styles except "In Line with Text" allow you to drag the shape wherever you want on the page.

A quicker way to access these options is to click the Layout Options button next to a selected shape:



The Layout Options mini task pane will then open, allowing you to choose a text wrapping style:

LAYOUT OPTIONS ×						
In Line with Text						
With Text Wrapping						
 <u>M</u>ove with text ¹ Fix position on ¹ 						
page						
See more						

The More Layout Options command in the Wrap Text menu (and the "See more" link in the Layout Options pane) will open the Layout dialog, where you can access advanced text wrapping and position options:

Layout				?	×			
Position Text Wrappin	g Size							
Horizontal								
○ <u>A</u> lignment	Left	\sim	relative to	Column		\sim		
◯ <u>B</u> ook layout	Inside	\sim	of	Margin		\sim		
Absolute <u>p</u> osition	5.08-	•	<u>t</u> o the right of	Column		\sim		
O <u>R</u> elative position		*	relative to	Page		\sim		
Vertical								
⊖ Ali <u>a</u> nment	Тор	\sim	relative to	Page		\sim		
Absolute position	0.03-	* *	belo <u>w</u>	Paragraph		\sim		
Relative position		*	relative to	Page		\sim		
Options								
Move object with text			Allow overlap					
Lock anchor	Layout in table cell							
				ОК	Cano	el		

Configuring Wrap Points

To customize exactly how text wraps around the shape, click Drawing Tools – Format \rightarrow Wrap Text \rightarrow Edit Wrap Points:



The shape will now be surrounded with a red border and black resize handles. Click and drag these handles to modify the associated point:



Here are the results of this change:

When you apply styles, your headings change to match the new theme. Save time in Word with new buttons that show up where you need them. To change the way a picture fits in your document, click it and a button for layout options appears next to it. When you work on a table, click where you want to add a row or a column, and then click the plus sign.



ADDING TEXT TO A SHAPE

To add text to a shape, right-click the shape and click Add Text or Edit Text:

⊟ 5 • ″ =	Drawing Tests Using Microsoft Office 2016 - Word	∞ – □ ×
File Home Insert Design Layout Re	erences Mailings Review View Format 🗘 Tell me what you want to do	Sign in 🔍 Share
Ø □ A	The second secon	E Height: 1.02° ↓ Width: 1.39° ↓
Insert Shapes	Shape Styles to WordArd Styles to Text Arrange	Size G A
	<section-header></section-header>	

(The command will differ with different types of shapes.)
Then a cursor will appear inside the shape. Type your text:



You can click the text at any time after adding it to make changes to it or to format it.

MODIFYING TEXT IN A SHAPE

Word provides some pre-formatted styles that you can format shape text with. First, select the text. Then, click a thumbnail in the WordArt Styles group of the Drawing Tools – Format tab:



Remember, you can use the up or down arrows to navigate through the gallery. Or, click the More arrow to expand the gallery and view all styles. You can also use the tools on the Home tab and the mini toolbar to format shape text.

ADDING CAPTIONS

To add a caption to a shape, select the shape that you would like the caption to be applied to. Then, click References \rightarrow Insert Caption:

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File Home	nsert	: Design	Layout	Refe	erences	Mailings	Review	View	Format				
Table of Contents *	ble	AB ¹	Next Footnot Show Notes	e -	Insert Citation	🖓 Manage 📴 Style: 🛛 🗸 🎼 Bibliogra	Sources PA + phy +	Insert Caption	Insert Table of I Update Table	Figures	Mark Entry	Mark Citation	L Insert Table of Authorities
Table of Contents		Foo	tnotes	5	Citat	ions & Biblioar	aphy	6	Captions		Index		Table of Authorities

The Caption dialog box will open. In this dialog, 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 shape.) Click OK to create the caption:

Caption			?	Х
Caption: Figure 1: 7 Options	'his syn	bol denotes new j	features.	
<u>L</u> abel:	Figure			\sim
Position:	Below	selected item		\sim
Exclude I	abel fro	om caption		
<u>N</u> ew Labe	el	Delete Label	N <u>u</u> mberi	ng
<u>A</u> utoCapti	on	ОК	Can	cel

The caption will now be applied:

N cror I	
Figure 1: This symbol Qlenotes new features.	^
00	

SETTING SHAPE STYLES

To apply a style to a shape, ensure that it is selected. Then, click a thumbnail in the Shape Styles gallery of the Drawing Tools – Format tab. You will see a preview as you mouse over each thumbnail:



Remember, you can use the up or down arrows to navigate through the gallery. You can also use the More arrow to expand the gallery and view all styles.

The styles available will depend on the theme currently selected. Likewise, the appearance of the shape will change if it is formatted with a style and you change the theme.

Even if you apply a style, you can customize the fill, outline, and effects of a shape using the commands to the right of the gallery:

B	∙ ত										Using Micro	osoft Office	2016 - Wo	ord
File	Home	Insert	Design	Layout	Reference	s Mailings	Review	View	Format	♀ Tell me what	you want to	o do		
	\\□0 L\\$\$ \\{}	▲ Constant ▲ Ed ★ Dr ▼	lit Shape - aw Text Box	Abc	Abc	Abc Abc	Abc	Abc	Abc 🔹	 △ Shape Fill ▼ ✓ Shape Outline ▼ ✓ Shape Effects ▼ 	Α	Α	A	4 4
	Insert S	hapes					Shape Style	es		r <u>s</u>		Wo	ordArt Style	s

RESIZING OPTIONS

To resize a shape, first click it to select it. Then, click and drag any of the handles to resize the shape in that direction. As you drag the handles, you will see the shape become larger or smaller, depending on the direction that you drag in:



You can also enter exact dimensions in the Size group of the Drawing Tools – Format tab:



For advanced resizing options, click the option button in the Size group. This will open the Size tab of the Layout dialog, offering advanced sizing and scaling options:

Layout		?	×
Position Text Wrapping Size			
Height			
Absolut <u>e</u>			
○ Re <u>l</u> ative	relative to Margin	\sim	
Width			
● A <u>b</u> solute 1.46"		_	
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Rotate			
Ro <u>t</u> ation: 0°			
Scale			
Height: 100 % ≑	<u>W</u> idth: 100 %		
Lock <u>a</u> spect ratio			
Relative to original picture size			
Original size	Width		
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	ОК	Can	cel

POSITIONING OPTIONS

You can also use the Position menu on the Drawing Tools – Format tab to choose how to place the shape on the page and have Word automatically set text wrapping. Each icon will show you how that command works, and you will see a preview as you mouse over each option:



The More Layout Options command will open the Position tab of the Layout dialog:

Layout					?	×
Position Text Wrappin	ng Size					
Horizontal						
○ <u>A</u> lignment	Left	\sim	relative to	Column		\sim
◯ <u>B</u> ook layout	Inside	\sim	of	Margin		\sim
Absolute position	5.01	-	to the right of	Column		\sim
<u>R</u> elative position		-	relative to	Page		\sim
Vertical						
◯ Ali <u>q</u> nment	Тор	\sim	relative to	Page		\sim
Absolute position	0.03"	-	belo <u>w</u>	Paragrap	h	\sim
O Relat <u>ive position</u>		*	relative to	Page		\sim
Options						
✓ Move object with t	ext	\checkmark	Allow overlap			
Lock anchor		\checkmark	Layout in table o	ell		
				ОК	Can	cel

Here you will find options to precisely control the position of this shape.

ACTIVITY 4-2 Drawing Shapes

In this activity, you will add a shape to your annual report template.

1. Open Microsoft Word 2016 and open Activity 4-2:



2. Scroll to the bottom of page two in the document. Double-click the footer area:



3. Now, click Insert \rightarrow Shapes \rightarrow Rounded Rectangle:



4. Click and drag to draw a rectangle that is approximately the same size as the footer:



5. With the rectangle selected, click the Drawing Tools – Format tab. Click the More arrow in the Shape Styles gallery:

⊟ 5 •	5 ÷							Drawing Tools	Header & Footer Tools
File Home	Insert	Design	Layout	References	Mailings	Review	View	Format	Design
) ∧ ∰Ed 3 ▼ Dr 3 ₹	it Shape - aw Text Box	Abc	Abc	Abc	Abc	Abc	Abc -	Shape Fill *

6. Click the "Gradient Fill– Ice Blue, Accent 1, No Outline" style:



7. Now, click the Send Backward arrow on the Drawing Tools – Format tab and click Send Behind Text:



8. Click Header & Footer Tools – Design \rightarrow Close Header and Footer:

H	\$	- U	÷							Drawing Tools	Header & Footer To	ols Activity 4-2 - Word	ł	
	н	ome	Insert	Design	Layout	References	Mailings	Review	View	Format	Design	Q Tell me what yo		
							i 🗖 i	🔄 Previ	ious	Different	First Page	Header from Top:	0.5" ‡	X
Header	Eooter	Page	Date 8	Documen	Ouick	Pictures Online	Go to Go	Next		Different	Odd & Even Pages	Footer from Bottom:	0.5" 🗘	Close Header
*	+	Numbe	r Time	Info *	Parts *	Pictures	Header For	oter 🚠 Link	to Previous	Show Doo	cument Text	Insert Alignment Tab		and Footer
Hei	ader & F	ooter			Insert			Navigation		0	Options	Position		Close 6

9. Check out the new footer design that you have created:



10. Save your document as Activity 4-2 Complete. Close Microsoft Word 2016 to complete this activity.

TOPIC C: Add WordArt and Other Text Effects

In addition to text boxes and shapes, you can use WordArt and drop caps to make text in your document stand out. In this topic, we will learn how to use these tools.

Topic Objectives

In this topic, you will learn:

- How to insert WordArt into a document
- How to format text with drop caps

WORDART

To add WordArt to your document, place your cursor where you want the WordArt to go. Then, click Insert \rightarrow WordArt and choose a style:

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	le	Home	Insert	Design	Løyout	Reference	es N	Aailings	Review	View	🛛 Tell m	e what y	ou want to	do														Sign i	R,	Share
Co Pe	er Bla e* Pa Pag	nk Page pe Break	Table 	Pictures	Online Sha	pes SmartArt	Chart	Screenshot	🚔 Store 🎝 My A	r Add-ins ~ Add-ins	W Wikipedia	Online Video Media	Hyperlin	k Bookmar Links	k Cross- reference	Comments	Header Foots	er Page Number - k Footer	Text Box *	Quick Parts *	WordArt	A Drop Cap -	Signature Date & Ti Object	Line *	π Equatio	Ω an Symbol				~
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Then, you will be prompted to type your text. You will also see the Drawing Tools – Format tab:



You can work with this object just like text boxes and shapes using the handles on the WordArt box and the commands on the Drawing Tools – Format tab. Note that if there is existing text in your document that you want to convert to WordArt, you can select it before performing the WordArt command.

DROP CAPS

A **drop cap** is a capital letter at the beginning of a paragraph that is larger than the other letters and is often dropped down into the paragraph. Drop caps can be a good way to draw the reader's eye to portions of your document, or just to make it more visually appealing.

To apply a drop cap, place your cursor in the paragraph where you want the drop cap to appear. (You can only apply drop caps to one paragraph at a time.) Then, click the Insert tab. Next, click the Drop Cap button and choose Dropped (which places it in the paragraph) or "In margin" (which places it beside the text):

⊟	<u>م</u> ، و	5 -										Using M	icrosoft Of	fice 2016 - W	ord							
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Cover Page *	Blank Pag Page Bre Pages	Tables	Pictures Or Pict	line Shapes Sn tures	aartArt Ch	art Screenshot	🗎 Store	e . Add-ins + Wi Add-ins	W	Online Video Media	Hyperlink Be	Dookmark Links	Cross- reference	Comment Comments	Header *	Faoter *	Page Number * ooter	Text Box *	Quick Parts *	A WordArt	A Drop Cap *	Signature Line - Date & Time Object - None Dropped In margin
																					A [orop Cap Options

You can also choose Drop Cap Options to specify advanced settings:

Drop Cap		?	×
Position	7 oped	W In <u>m</u> a	argin
Options			
+Body			\sim
Lines to drop:	3		*
Distance from text:	0"		*
ОК		Cano	el

Here is the result of a basic Dropped style drop cap applied to the sample paragraph shown earlier:

Using Microsoft Office 2016

Video provides a powerful way to help you prove your point. When you click Online Video, you can paste in the embed code for the video you want to add. You can also type a keyword to search online for the video that best fits your document. To make your document look professionally produced, Word provides header, footer, cover page, and text box designs that complement each other.

To remove a drop cap, place your cursor in the paragraph and click Insert \rightarrow Drop Cap \rightarrow None.

ACTIVITY 4-3 Adding WordArt and Other Text Effects

In this activity, you will add WordArt and a drop cap to your annual report document.

1. Open Microsoft Word 2016 and open Activity 4-3:



2. On the title page, select the "Annual Report" text. Click Insert → WordArt → Fill – Orange, Accent 2, Outline – Accent 2:



3. The WordArt will be created and selected:



4. Click the Layout Options button beside the WordArt:



5. Click the "Fix position on page" radio button:



6. Click and drag the top right-hand corner handle of the WordArt up and out so that the box is about the same length as the image and about 1.5 inches tall:



7. Select the text in the WordArt box. Use the mini toolbar to increase the font size to 48:



8. Now, click Drawing Tools – Format \rightarrow Align Text \rightarrow Middle:

E 5 · c =			- Word	
File Home Insert Design	Layout References Mailings Review View	Format Q Tell me what you want to do		
E \	Abc Abc Abc Abc Abc	Abc	A Text Fill * A Text Outline * Text Direction *	Align Create Por Text - Link
Insert Shapes	Shape Styles	rs W	ordArt Styles rs	Iop Iop
				Middle
				<u>B</u> ottom

9. Your cover page should now look like this:



10. Scroll to the second page of the document. Click to place your cursor inside the first paragraph of this page:



11. Click Insert \rightarrow Drop Cap \rightarrow Dropped:

⊟	5 • 0	÷									Activity	I-3 - Word						
File	Home	Insert	Design Layout	References	Mailings													
Cover Page *	Blank Page	Table	Pictures Online Shape	es SmartArt Ch	art Screenshot	着 Store 🎝 My Add-ins	W Wikipedia	Online Video	Hyperlink	Bookmark	Cross-	Comment	Header Foote	Page Number -	Text C	uick WordAr	A Drop	Signature Line
	Pages	Tables		lustrations		Add-in	5	Media		Links		Comments	Header &	Footer				None
																	Α	Dropped
																	Α	In margin
																	<u>^</u>	prop Cap Options

12. Here is the result:

HEADING 1 ONE

The lnsert tab, the galleries include items that are designed to coordinate with the overall look of your document. You can use these galleries to insert tables, headers, footers, lists, cover pages, and other document building blocks. When you create pictures, charts, or diagrams, they also coordinate with your current document look. On the Insert tab, the galleries include items that are designed to coordinate with the overall look of your document. You can use these galleries to insert tables, headers, footers, lists, cover pages, and other document building blocks. When you create pictures, charts, or diagrams, they also coordinate with your current document look.

13. Save your document as Activity 4-3 Complete. Close Microsoft Word 2016 to complete this activity.

TOPIC D: Create Complex Illustrations with SmartArt

If you need to combine shapes and text to create a diagram, then SmartArt is the best tool to use. In this topic, you will learn how to insert and modify SmartArt diagrams.

Topic Objectives

In this topic, you will learn:

- What SmartArt graphics are
- How to insert SmartArt using the Choose a SmartArt Graphic dialog box
- How to add text and images to a SmartArt diagram
- About the types of SmartArt graphics that are available in Microsoft Word
- About the commands available on the SmartArt Tools contextual tab set

SMARTART GRAPHICS

SmartArt is Microsoft's intelligent way of adding diagrams to your Office documents. These predesigned templates can include picture placeholders, shapes, and text boxes, providing you with a framework to enter many types of information.

Like other objects, SmartArt designs coordinate with your current theme. As well, there are many different design, color, and layout options available so that you can choose the right style for each document.

THE CHOOSE A SMARTART GRAPHIC DIALOG BOX

To add SmartArt to a document, click to place your cursor where you want the diagram to appear. Then, click Insert \rightarrow SmartArt:

H	ار ا	G	÷						
File	Ho	me	Insert	Design	Layo	out	Reference	s N	Mailings
						\bigcirc		d.	0+
Cover	Blank	Page	Table	Pictures	Online	Shapes	SmartArt	Chart	Screenshot
Page 🔻	Page	Break	-		Pictures	-			-
	Pages		Tables			Illus	strations ¹	5	

The Choose a SmartArt Graphic dialog will open:

Choose a SmartArt Graphic				? ×
 All List Process Cycle 品 Hierarchy 限 Relationship ① Matrix 	List		Î	
Pyramid Picture Office.com		⊖_ ⊖_ O	<	Basic Block List Use to show non-sequential or grouped blocks of information. Maximizes both horizontal and vertical display space for shapes.
				OK Cancel

First, choose a **category (1)** from the list on the left. Then, choose a **specific diagram type (2)** to view **additional details** about it and a preview in the pane on the right **(3)**.

When you are ready to create your diagram, click OK:

Choose a SmartArt Graphic		?	×
지 All List		• -	
୦୦୦ Process ବ୍ଲାହ Cycle			
品 Hierarchy 副 Relationship 色 Matrix			
Pyramid	Increasing Circle Proc	ess of steps, with	the
Office.com	OOO DOD THE LINE OF LI	creasing with Level 1 steps s. Works well l 2 text.	u each but with
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Now, the diagram will appear in your document:



ADDING TEXT AND IMAGES TO THE DIAGRAM

To add text to the diagram, click where it says [Text] and type:



You can also use the Text pane to enter text. To show this pane, click the left-facing arrow on the left edge of the diagram or click SmartArt Tools – Design \rightarrow Text Pane:

	Using Microsoft Office 2016 - Word SmartArt Tools	■ – ■ ×
File Home Insert Design Layout	References Mailings Review View Design Format Q Tell me what you want to do	Sign in 🔍 Share
Create Graphic Create Graphic Create Graphic Create Graphic Create Graphic Create Graphic	Layout States	Reset Graphic Reset
	For example, you can add a matching cover page, header, and sidebar. (Icik insert and then choose the elements you want from the different galleries. Themes and styles also help keep your document coordinated. When you click Design and choose a new Theme, the pictures, charts, and SmartArt graphics change to match your new theme.	
	When you apply styles, your headings change to match the new theme. Save time in Word with new buttons that show up where you need them. To change the way a picture fits in your document, click it and a button for layout options appears next to it. When you work on a table, click where you want to add a row or a column, and then click the plus sign.	
	Training Process	
	🦢 Step One 🔵 [Text] 🔵 [Text] ဳ 🗖	
	[Text] [Text] [Text]	
	òo	
Page 1 of 1 201 words D2		- + 1095

The Text pane will now be displayed. Click and type to enter the diagram's information:

🖬 👆 - 🗗 = Using Microsoft	Office 2016 - Word	SmartArt Tools		📼 – 🗆 X
File Home Insert Design Layout References	Mailings Review View	Design Format 🖓 Tell me wh		Sign in 🔒 Share
Add Shape - ← Promote ↑ Move Up Add Builet → Demote ↓ Move Down Test Pane		Change Colors*		 Reset Graphic
Contrologate	Leyests For example, you can add a r elements you want from the coordinated. When you citks graphics change to match yo When you apply styles, your buttons that show up where and a button for layout optic add a row or a column, and t Training Proces	matching cover page, header, and different galleries. Themes and st Design and choose a new Theme, sur new theme. headings change to match the ner you need them. To change the wa mus appears next to it. When you w then click the plus sign.	idebar. Click insert and then choose the les also help keep your document he pictures, chars, and SmartAt with the second second second second second the second second second second second of the second se	Reset
• Stee One	Step One	ሳ 🛑 [Text]	[Text]	
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Increasing Circle Process Up to show a sinite of steps, with the Up to show a sinite of steps, with the reputing of the sinite show the sinite show the unimited level 2 items. Works well with large amount of Level 2 item. Learn more about 5 method				

You can press Tab to demote items or Shift + Tab to promote them. Microsoft Word will adjust the size of the text and the diagram as you add more information. Note that different diagrams support different numbers of shapes and sub-shapes; Word will let you know if you exceed the supported amount.

Some graphics offer the option to include pictures. To do this, click the picture placeholder:



The Insert Pictures dialog box will open. You can click Browse to choose an image from your computer, or browse the Internet for an image. For this example, we will choose a local image:

			×						
Insert Pictures									
	From a file Browse files on your computer or local network	Browse ▶							
b	Bing Image Search Search the web	Search Bing							
Sign sites	in with your Microsoft account to insert photos and vide	os from Facebook, Flickr, and other							

Next, browse to the picture that you want to use, click to select it, and click Insert:



Word will then insert the picture in the proper size:



You can then format the image using the tools that we learned about in Lesson 3.

SMARTART GRAPHIC CATEGORIES

Let's take a closer look at the categories available in the Choose a SmartArt Graphic dialog box.

Category	Description	Sample Diagram Types
All	All available SmartArt diagrams, sorted by category type.	• N/A
List	Present blocks of information.	Basic Block ListSquare Accent List
Process	Outline steps in a process or workflow.	FunnelConverging Text
Cycle	Show a continuous sequence of steps.	Cycle MatrixGearRadial Venn
Hierarchy	Present hierarchical information, like an organization chart.	Organization ChartHierarchyLined List

Relationship	Show how different elements are connected to each other.	Basic VennGear
Matrix	Illustrate how different parts relate to the whole.	Basic MatrixTitled Matrix
Pyramid	Present proportional relationships, like the food pyramid.	Basic PyramidSegmented Pyramid
Picture	Lists all diagram types that include image placeholders.	Spiral PictureAccented Picture
Office.com	Lists diagrams available from Office.com. As such, this category may change at any time.	Vertical Bracket ListTheme Picture Grid

THE SMARTART TOOLS CONTEXTUAL TABS

Let's look at the two contextual tabs that become available when editing SmartArt.

SmartArt Tools – Design Tab

The first tab (Design) lets you apply a variety of preset styles and colors to your diagram:



The groups on this tab are:

- **Create Graphic group:** Contains commands to add shapes and bullets to the graphic, as well as modify those elements. Also contains a command to show and hide the Text pane.
- Layouts group: Change the layout of the currently selected graphic. View more layouts by clicking the More arrow. (The Choose a SmartArt Graphic dialog box can also be opened from here.)
- SmartArt Styles group: Change the style and/or color scheme of the graphic.
- **Reset group:** Reset the graphic to its default settings and appearance. Text will not be removed.

SmartArt Tools – Format Tab

The other SmartArt Tools tab (Format) gives you finer control over the shape, style, and position of your diagram:



The groups on this tab are:

- **Shapes group:** Change the selected shape, or make it larger or smaller.
- Shape Styles group: Customize the appearance of the shape.
- WordArt Styles group: Customize the text in the shape.
- Arrange group: Arrange the shapes and objects in the graphic.
- Size group: Enter specific dimensions for the height and width of the shape or graphic.

ACTIVITY 4-4

Creating Complex Illustrations with SmartArt

In this activity, you will add a diagram about the process of creating a report to help template users.

1. Open Microsoft Word 2016 and open Activity 4-4:



2. Press Ctrl + End to go to the last line of the document: a blank line after "The Report Writing Process" header. Then, click Insert → SmartArt:



3. The Choose a SmartArt Graphic dialog box will open. Click the Process category. Ensure that the first diagram type (Basic Process) is selected and click OK:

Choose a SmartArt Graphic						? ×
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Pyramid			Ó??Ó??	<u> </u>		Basic Process Use to show a progression or sequential
Office.com	000		777	$ \rightarrow \rightarrow$		steps in a task, process, or workflow.
		<u> </u>			¥	
						OK Cancel

4. The diagram will be inserted and ready for editing:

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Add Shape ▼ + Promote ↑ Move Up Add Bullet → Demote ♦ Move Down Text Pane ♦ Right to Left & Layout ↑ Casta Example /		Reset Graphic	
Credit Graphs	two two description Prop 2 Annual Report	Read	
Page 4 of 4 789 words	10 gi	05 - I	+ 109%

5. If the Text pane is not currently shown, click SmartArt Tools – Design \rightarrow Text Pane:

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tan Add S	Shape 👻	\in	Promote	↑ Mov	/e Up						-	
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💷 Text P	ane N	₹	Right to Left	යි Layo	out -						Ŧ	Colors *
	63	Cre	ate Graphic					Layouts				

(If the Text pane is already displayed, skip to the next step.)

6. Fill out the Text pane as shown below, and then close it:



7. This diagram is pretty plain. Let's change the layout so that we can add some images. Click the More arrow in the Layouts gallery on the SmartArt Tools \rightarrow Design tab:

	5 - 0								SmartA	art Tools
File	Home	Insert	Design	Layout	References	Mailing	s Review	View	Design	Format
tan Add S	Shape 🝷 🗧	Promote	1 Move	Up						
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📃 Text 🛙	Pane 孝	Right to Lef	t 🖧 Layoi	ut -			~ <u>~</u> ~			Colors
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8. Mouse over some of the different layouts that are available. When you are ready, click Picture Accent Process:



9. Click the outer border of the SmartArt diagram. Drag the right edge outwards to make it bigger:

B 5·0 ×	Activity 4-4 - Word	SmartArt Tools	• - • ×
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Paste S Cut Tw Can MT (B * B+ * B I U + 466 x, x'	A X Ar (상 프로프 영) 프로 (A X - 소 · 프로프 (파) 쇼	ĝ↓ ¶ Ao8bCcDdi • ⊡ • I Footer E	AntibiCitiel AntibiCitiel AntibiCitiel AntibiCitie Ant
Clipboard IS Font	rs Paragraph	5	Styles 15 Editing A
	Page 2	PROCESS	Annual Report

- Research Outline Draft Revise Proofread
- **10.** Now, click the picture placeholder for the first item in the diagram:

11. In the Insert Pictures dialog box, click Browse to choose a local image:



12. The Insert Picture dialog box will open. Browse to Lesson 4 of your Exercise Files and open the SmartArt Images folder. Select the Research image and click Insert:

1 Insert Picture					×
← → × ↑ 📙 « Starti	ing Files for Activities > Lesson 4 >	SmartArt Images	5 v	Search SmartArt Images	P
Organize 🔻 New folder				•	•
 ↓ Quick access ▶ Desktop ↓ Downloads ↓ Downloads ↓ Downloads ↓ Pictures ↓ Music ♥ Videos ♥ Microsoft Word ▲ OneDrive ■ This PC ♥ Network ▲ Homegroup 	Draft Proofread	Research			
File nam	e: Research		∽ Tools ▼	All Pictures	→ ancel

13. The image will be inserted and resized:



14. Repeat steps 10 to 12 to add the Draft and Proofread images to the appropriate steps:



15. Finally, let's change the color scheme. Click SmartArt Tools – Design → Change Colors and choose any color scheme you like:

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File	Hom	e Ins	ert	Design	Layout	Reference	es Mailing	s Reviev	v View	Design	Format	Q Tell me wha	t you want to d	o	
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16. The diagram is now complete:



17. Save your document as Activity 4-4 Complete. Close Microsoft Word 2016 to complete this activity.

Summary

In this lesson, we explored some of the different types of illustrations that you can add to Microsoft Word documents. We covered text boxes, shapes, WordArt, drop caps, and SmartArt. You should now feel comfortable adding these types of graphics to any document.

REVIEW QUESTIONS

- 1. Which two contextual tabs are available when editing SmartArt diagrams?
- 2. What is the command sequence to create a drop cap in the margin of a paragraph?
- 3. Which contextual tab is available when working with shapes and text boxes?
- 4. What is the easiest way to add an image from the Internet to a SmartArt diagram that contains picture placeholders?
- 5. In Microsoft Word, what is a drawing canvas?

LESSON 5: INSERTING CONTENT USING QUICK PARTS

Lesson Objectives

In this lesson you will learn how to:

- Insert building blocks
- Create and modify building blocks
- Insert fields using Quick Parts

TOPIC A: Insert Building Blocks

In Lesson 4, we saved custom text boxes for re-use. You can, in fact, save many types of elements as **building blocks**, which can then be combined to create the framework for a document. You can also create **Quick Parts**, which are pieces of content that are saved as building blocks and can be re-used over and over. In this topic, we will examine both of these useful tools.

Topic Objectives

In this topic, you will learn:

- How to insert and use Quick Parts and building blocks
- How to use the Building Blocks Organizer dialog box

QUICK PARTS

Quick Parts are reusable chunks of content, such as a company motto or a document property. There are three categories of Quick Parts, visible when you click Insert \rightarrow Quick Parts:



The options are:

- AutoText: Customizable pieces of text that you can save for re-use, like a company motto or favorite saving.
- Document Property: Controls with information about the document (based on file properties).
- **Field**: Controls that can automatically update information, like index entries or the current date and time.

Custom Quick Parts (such as images) can also be saved, and will be available in the top part of the menu.

BUILDING BLOCKS

As we mentioned earlier, **building blocks** are pre-formatted elements that can be combined to create a cohesive look for a document. As well, they are integrated with themes and styles so they can be updated quickly and easily.

For example, the document shown below uses four Motion building blocks: a **cover page (1)**, **sidebar (2)**, **quote (3)**, and **footer (4)**.



THE BUILDING BLOCKS ORGANIZER DIALOG BOX

You will find the Building Blocks Organizer command in the Quick Parts menu:



This command will open the Building Blocks Organizer dialog box. This lists all of the building blocks that are available:

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<u>B</u> uilding blocks	:				Click a building block to see its preview	
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Bibliography	Bibliograp	Built-In	Built-In Buil			
Works Cited	Bibliograp	Built-In	Built-In Buil			
Whisp	Cover Pages	Built-in	Built-In Buil			
Banded	Cover Pages	Built-in	Built-In Buil		[DOCUMENT TITLE]	
Motion	Cover Pages	Built-in	Built-In Buil		(Document subtitle)	
Grid	Cover Pages	Built-in	Built-In Buil			
Integral	Cover Pages	Built-in	Built-In Buil			
Austin	Cover Pages	Built-in	Built-In Buil			
Slice (Light)	Cover Pages	Built-in	Built-In Buil.	1		
Retrospect	Cover Pages	Built-in	Built-In Buil			
Sideline	Cover Pages	Built-in	Built-In Buil			
ViewMaster	Cover Pages	Built-in	Built-In Buil			
Semaphore	Cover Pages	Built-in	Built-In Buil			
lon (Light)	Cover Pages	Built-in	Built-In Buil			
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Facet	Cover Pages	Built-in	Built-In Buil		(School)	
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You can click any **building block (1)** in the list on the left to see a **preview (2)**. (Click the **column headers**, marked with a **3**, to sort the entries.) You can also use the commands at the bottom of the dialog to **edit** or **delete** the currently selected building block, or to **insert (4)** it into the document.

When you have finished working with the Building Blocks Organizer, click **Close (5)**.

ACTIVITY 5-1 Inserting Building Blocks and Quick Parts

In this activity, you will add building blocks to a document to create a polished look.

1. Open Microsoft Word 2016 and open Activity 5-1:



2. Let's see what kinds of building blocks we can add to this document. Click Insert \rightarrow Quick Parts \rightarrow Building Blocks Organizer:

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Cover Page *	Blank Page Page Break	Table	Pictures Online Shapes SmartArt Chart Screenshot	🚔 Store 🛛 🖤 🎝 My Add-ins - ^{Wikipedis}	Online Video	Cross- reference	Header Footer Page	Iest Quick WordArt Drop Cap - Object -
	Pages	Tables	Illustrations	Add-ins	Media Links	Comments	Header & Footer	AutoText >
								 ▶ Document Property ▶ Eield
								Building Blocks Organizer Save Selection to Quick Part Gallery

(You may need to click inside the document to make this command available.)

3. In the Building Blocks Organizer dialog, click the Name header to sort by that field:

Building Blocks	organizer				?	\times
Building blocks				Click a building block to see its preview		
Name N	Gallery	Category	Template ^			^
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lon (Light)	Cover Pages	Built-in	Built-In Buil	Bibliography		
Motion	Cover Pages	Built-in	Built-In Buil	Chen, J. (1020). Charlonce and Beforences. New York: Cardona Proces. Hand, J. (2025). Creating a Formal Authiostics. Bostance Proceedings. Inc.		
ViewMaster	Cover Pages	Built-in	Built-In Buil	Manner, J. D. (2026). How in Mrite Ablingraphies. Chicago: Adventure Warks Press.		
lon (Dark)	Cover Pages	Built-in	Built-In Buil			
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Filigree	Cover Pages	Built-in	Built-In Buil			
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4. Scroll through the list of building blocks and click some of the entries to see a preview. The Semaphore building block look nice:

Building Blocks	; Organizer					?	Х
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Rounded R	Page Num	With Shapes	Built-In Buil				
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Scroll	Page Num	With Shapes	Built-In Buil			[DATE]	
Semaphore	Footers	Built-in	Built-In Buil				
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Semaphore	Headers	Built-in	Built-In Buil				
Semaphore	Text Boxes	Built-in	Built-In Buil				
Semaphore	Text Boxes	Built-in	Built-In Buil				
Sideline	Headers	Built-in	Built-In Buil				
Sideline	Footers	Built-in	Built-In Buil				
Sideline	Cover Pages	Built-in	Built-In Buil				
Sideline Qu	Text Boxes	Built-in	Built-In Buil				
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Slice	Footers	Built-in	Built-In Buil			[DOCUMENT TITLE] [DOCUMENT SUBTTLE]	
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5. Close the Building Blocks Organizer:

Building Blocks	Organizer				?	×
uilding blocks				Cli	ck a building block to see its preview	
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Rounded R	Page Num	With Shapes	Built-In Buil			
SAMPLE 1	Watermarks	Disclaimers	Built-In Buil			
SAMPLE 2	Watermarks	Disclaimers	Built-In Buil		•	
Scroll	Page Num	With Shapes	Built-In Buil		[DATE]	
Semaphore	Footers	Built-in	Built-In Buil			
Semaphore	Cover Pages	Built-in	Built-In Buil			
Semaphore	Headers	Built-in	Built-In Buil			
Semaphore	Text Boxes	Built-in	Built-In Buil			
Semaphore	Text Boxes	Built-in	Built-In Buil			
Sideline	Headers	Built-in	Built-In Buil			
Sideline	Footers	Built-in	Built-In Buil			
Sideline	Cover Pages	Built-in	Built-In Buil			
Sideline Qu	Text Boxes	Built-in	Built-In Buil			
Sideline Sid	Text Boxes	Built-in	Built-In Buil			
Simple Quote	Text Boxes	Built-in	Built-In Buil			
Slice	Footers	Built-in	Built-In Buil		[DOCUMENT TITLE] [DOCUMENT SUBTILE]	
Slice (Dark)	Cover Pages	Built-in	Built-In Buil			
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Slice 1	Headers	Built-in	Built-In Buil			
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					Cla	se
6. Now, let's add a cover page building block. Click Insert \rightarrow Cover Page \rightarrow Semaphore:



(You may need to scroll down in the menu to see this cover page.) You can see that the color already reflects the document's theme.

7. The cover page will be inserted:



8. Now let's see if there is a matching header. Scroll to the third page of the document and click to place your cursor there. Click Insert \rightarrow Header \rightarrow Semaphore:

⊟ 5·0 :	Activity 5-1 - Word	■ - □ ×	
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9. Review the new header. Then, close Header and Footer view:



10. Scroll to the last page of the document. Click to place your cursor on the page. Click Insert \rightarrow Text Box \rightarrow Semaphore Sidebar:

8														
File	Home	insert	Design Layout References	Mailings Revi	iew View 🖓 Tellma	what you wa	ent to do						Sign ir	A Share
Cover Page 1	Blank Page Page Break Pages	Table Tables	Richares Christe Shapes Smathet Pictures - Illustrations	Chart Screenshot	Store W My Add-ins - Wikipedia Add-ins	Online Video Metha	gerfink Bookmark	Cross- eference Corre	ment Header Foo	ter Page Number= ik Poster	Test Box - Parts	A Signature Line Doop Date & Time Cap - Cobject - Motion Sidebar	πΩ Equation Symbol Retrospect Quote	•
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Page 6	of 6 123 wa	ds 1,8	to									14 10	6 - I	+ 99%

11. The sidebar will be inserted:



12. The document is now complete. Save your document as Activity 5-1 Complete and close Microsoft Word 2016 to complete this activity.

TOPIC B: Create and Modify Building Blocks

Although Microsoft Word provides many built-in building blocks for you to use, you can also create your own blocks and save them in either the global Building Blocks template (Building Blocks.dotx) or your own custom template.

Topic Objectives

In this topic, you will learn:

- How to create and modify building blocks
- How to copy building blocks between documents

THE CREATE NEW BUILDING BLOCKS DIALOG BOX

If you have created a custom element (such as a text box or cover page) that you want to save for future use, you can store it in the Building Blocks Organizer.

To start, select the desired object(s). Then, click Insert \rightarrow Quick Parts \rightarrow Save Selection to Quick Part Gallery:



The Create New Building Block dialog box will open. Set your options and click OK:

Create New	Building Block ? ×
<u>N</u> ame:	ZoomFoods Cover Page
Gallery:	Cover Pages 🗸
<u>C</u> ategory:	Built-in 🗸
<u>D</u> escription:	
<u>Save in:</u>	Building Blocks
Options:	Insert content in its own page 🗸 🗸
	OK Cancel

It will now be available in the Building Blocks Organizer for all documents, as well as any related menus:

When you close Microsoft Word after saving custom building blocks, you will again be prompted to save your changes:





Be sure to click Save or your changes will be discarded.

BUILDING BLOCK MODIFICATION OPTIONS

To modify a building block, click Insert \rightarrow Quick Parts \rightarrow Building Block Organizer:

₽	ა . დ	÷						ZoomFo	ds - Word							ſ
File	Home	Insert	Design Layout References	s Mailings	Review View											
Cover Page	Blank Page Page Break	Table	Pictures Online Shapes SmartArt	Chart Screenshot	🚔 Store 🎝 My Add-ins 🔹	W Wikipedia	Online Video	Hyperlink Bool	mark Cross-	Comment	Header Footer	Page Number *	Text Box *	Quick WordA	A Signature Line Topo Cap - Object -	¥
	Pages	Tables	Illustrations		Add-in:		Media	Li Li	ks	Comments	Header &	Footer		Mi AutoText	•	,
														Documer	nt Property	۲
														Eield		
														Building	Blocks Organizer	
														Save Sele	ction to Quick Part Gallery	

The Building Blocks Organizer dialog box will open. In it, find and select the building block that you want to modify. Click Edit Properties:

Building Blocks	s Organizer					?	×
Building blocks					Click a building block to see its preview		
Name	Gallery	Category	Template	^			^
References	Bibliograp	Built-In	Built-In Buil				
Bibliography	Bibliograp	Built-In	Built-In Buil				
Works Cited	Bibliograp	Built-In	Built-In Buil				
Whisp	Cover Pages	Built-in	Built-In Buil			,	
Banded	Cover Pages	Built-in	Built-In Buil		ZoomFoods	/	
Motion	Cover Pages	Built-in	Built-In Buil				
Grid	Cover Pages	Built-in	Built-In Buil				
Integral	Cover Pages	Built-in	Built-In Buil				
Austin	Cover Pages	Built-in	Built-In Buil				
Slice (Light)	Cover Pages	Built-in	Built-In Buil				
Retrospect	Cover Pages	Built-in	Built-In Buil				
Sideline	Cover Pages	Built-in	Built-In Buil				
ViewMaster	Cover Pages	Built-in	Built-In Buil				
Semaphore	Cover Pages	Built-in	Built-In Buil				
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Facet	Cover Pages	Built-in	Built-In Buil				
Slice (Dark)	Cover Pages	Built-in	Built-In Buil				
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Edit Properties	s <u>D</u> elet	e <u>I</u> nsert					
	63				Ε	Close	:

Now, you can modify the options that you originally set when creating the building block:

Modify Build	Modify Building Block ? >									
<u>N</u> ame:	ZoomFoods Cover Page									
<u>G</u> allery:	Cover Pages	\sim								
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<u>D</u> escription:										
<u>S</u> ave in:	Building Blocks	\sim								
Options:	Insert content in its own page	\sim								
	OK Canc	el								

Click OK to save your changes.

You can also delete the building block from the Building Blocks Organizer:

Building Blocks	organizer				? ×
Building blocks					Click a building block to see its preview
Name	Gallery	Category	Template	^	^
References	Bibliograp	Built-In	Built-In Buil		
Bibliography	Bibliograp	Built-In	Built-In Buil		
Works Cited	Bibliograp	Built-In	Built-In Buil		
Whisp	Cover Pages	Built-in	Built-In Buil		
Banded	Cover Pages	Built-in	Built-In Buil		ZoomEoods
Motion	Cover Pages	Built-in	Built-In Buil		
Grid	Cover Pages	Built-in	Built-In Buil		
Integral	Cover Pages	Built-in	Built-In Buil		
Austin	Cover Pages	Built-in	Built-In Buil		
Slice (Light)	Cover Pages	Built-in	Built-In Buil		
Retrospect	Cover Pages	Built-in	Built-In Buil		
Sideline	Cover Pages	Built-in	Built-In Buil		
ViewMaster	Cover Pages	Built-in	Built-In Buil		
Semaphore	Cover Pages	Built-in	Built-In Buil		
lon (Light)	Cover Pages	Built-in	Built-In Buil		
ZoomFood	Cover Pages	Built-in	Building Blo		
Filigree	Cover Pages	Built-in	Built-In Buil		
Facet	Cover Pages	Built-in	Built-In Buil		
Slice (Dark)	Cover Pages	Built-in	Built-In Buil		
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Edit Properties	<u>D</u> elet	e <u>I</u> nsert			
		3			
					Close

COPYING BUILDING BLOCKS BETWEEN DOCUMENTS

As long as you have saved the building block to the default Building Blocks template, it will be available to add to any document using the normal commands. You can also copy and paste Building Block content between documents just like regular document content.

ACTIVITY 5-2 Creating and Modifying Building Blocks

In this activity, you will create and save a building block.

1. Open Microsoft Word 2016 and open Activity 5-2:



2. Scroll to the third page of the sample document. Click the photo to select it:



3. Now, click Insert \rightarrow Quick Parts \rightarrow Save Selection to Quick Part Gallery:

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																		(=)	Eield			
																		0	Building Bl	ocks Or	ganizer	
																		lin :	Save Select	ion to (Quick Part Galle	y D

4. The Create New Building Block dialog will open. Enter "Stock Photo" as the name and click OK:

Create New B	Building Block ?	×
<u>N</u> ame:	Stock Photo	
<u>G</u> allery:	Quick Parts	\sim
<u>C</u> ategory:	General	\sim
<u>D</u> escription:		
<u>S</u> ave in:	Building Blocks	\sim
Options:	Insert content only	\sim
	ОК	Cancel

5. Scroll to the last page of the document and click to place your cursor on the last line:

E 5 C :	Picture Tools Activity 5-2 - Word		100 − □ ×
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	[Author serve] [DOCUMENT TITL]		
	Heading 1 Include quales from key people to help you make your point. I	(Sidebar Title) Roleinar are great for calling out proporties points from where for our active stress, such as a suchasile. They are hyperblap based on the page, the byse can easily all points are your break to a they are stress, such as the profession of the stress of the base and start typing.)	
Page 6 of 6 123 words [2]			11 15 - 1 + 295

6. Click Insert \rightarrow Quick Parts. You will see our stock photo listed at the top of the gallery. Click it to insert it:



7. The image will now be added to the page:



8. Let's modify the description of this object so that it is more expressive. Click Insert \rightarrow Quick Parts \rightarrow Building Blocks Organizer:

8	ა . თ								Activity 5-2	- Word						α	1 –	6
File	Home	Insert	Design Layout	References	Mailings	Review Vie	w 🖓 Tellm	ie what you	want to do								Sign	in j
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																	ly and	
															AutoText Document Property Field			
															Building Blocks Organizer	Gallery		

9. Locate the Stock Photo item and click it to select it. Then, click Edit Properties:

Building Blocks	Organizer					?	×
<u>B</u> uilding blocks:					Click a building block to see its preview		
Name	Gallery	Category	Template	^			^
Roman 1	Page Num	Plain Number	Built-In Buil				
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Stock Photo	Quick Parts	General	Building Blo			i i	
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Calendar 3	Tables	Built-In	Built-In Buil				
Calendar 2	Tables	Built-In	Built-In Buil				
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Edit Properties	Delet	a Incert					
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10. Add the text "(Man with Bike)" to the Name field and click OK:

Modify Build	ling Block	?)	×
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<u>G</u> allery:	Quick Parts			\sim
<u>C</u> ategory:	General			\sim
<u>D</u> escription:				
<u>S</u> ave in:	Building Blocks			\sim
Options:	Insert content only			\sim
	ОК		Cancel	

11. Click Yes when you are prompted to confirm the action:

Microsof	t Word X
?	Do you want to redefine the building block entry?
	Yes No

12. Close the Building Blocks Organizer dialog:

Building Blocks	s Organizer					?	×	
Building blocks					(Click a building block to see its preview		
Name	Gallery	Category	Template	^				٨
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Sideline	Cover Pages	Built-in	Built-In Buil			References		
lon (Dark)	Cover Pages	Built-in	Built-In Buil			Chan, J. (2009). Obstican: and References. New York: Gardona Press. Hans, J. (2009). Constring a Forward Publication. Instrume Proceedings. Inc.		
Filigree	Cover Pages	Built-in	Built-In Buil			Kanner, J. D. (2006) How to Write shifting up hits: Chicago: Adventure Warks Press.		
Slice (Light)	Cover Pages	Built-in	Built-In Buil					
Integral	Cover Pages	Built-in	Built-In Buil					
Whisp	Cover Pages	Built-in	Built-In Buil					
Retrospect	Cover Pages	Built-in	Built-In Buil					
Facet	Cover Pages	Built-in	Built-In Buil					
Austin	Cover Pages	Built-in	Built-In Buil					
Motion	Cover Pages	Built-in	Built-In Buil					
Semaphore	Cover Pages	Built-in	Built-In Buil					
ViewMaster	Cover Pages	Built-in	Built-In Buil					
Banded	Cover Pages	Built-in	Built-In Buil					
Slice (Dark)	Cover Pages	Built-in	Built-In Buil					
lon (Light)	Cover Pages	Built-in	Built-In Buil					
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							Close	2

13. Save your document as Activity 5-2 Complete. Close Microsoft Word 2016 to complete this activity. Be sure to save the changes to the Building Blocks file when prompted.

TOPIC C: Insert Fields Using Quick Parts

Let's take a closer look at the fields available to insert as Quick Parts. This feature allows you to add variable text to the document, such as the author's name (based on the file properties) or the current date.

Topic Objectives

In this topic, you will learn:

- About fields in Microsoft Word
- The syntax that Microsoft Word fields use
- How to use the Field dialog box

FIELDS

A field is a placeholder for variable text. Some examples of fields include:

- Index entries
- Formulas in tables
- Page numbers
- The current date

Fields are used automatically for all of these functions, but you can also manually create fields as required.

FIELD CODE SYNTAX

A **field code** is the programming that tells Microsoft Word what to show in the actual field. For example, this title page shows us who prepared the report:

ANNUAL REPORT



Prepared By BOB SMITH

If we press Alt + F9 with this information selected, we will see the field code:



The field code has three parts. The first part contains the **field name (1)**. (Here, we can see that the Author field is being used.) Next, the **properties (2)**, if available, are listed. (In our example, the properties indicate that the field will be displayed in uppercase.) Finally, **optional switches (3)** can be added to the end. (In this case, the MergeFormat switch tells Word to match the formatting of the underlying paragraph.)

You can press Alt + F9 at any time to re-display the field result.

THE FIELD DIALOG BOX

Although you can manually type fields, it is far easier to insert them with the Field dialog box. To start, place your cursor where you want the field information to go. Then, click Insert \rightarrow Quick Parts \rightarrow Field:



The Field dialog box will open:

Field		?	×
Please choose a field	Field properties		
<u>C</u> ategories:	Click the button below to set advanced field options		
(All) ~	Formula		
<u>F</u> ield names:			
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AddressBlock			
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Comments			
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Descriptions			
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First, select the field name from the list on the left. Then, appropriate options will be shown in the pane on the right:

Field properties	Field options
Date formats:	Use the <u>H</u> ijri/Lunar calendar
9/21/2015	Insert the date in last used format from
Monday, September 21, 2015 September 21, 2015 9/21/15	Use the Saka Era calendar
2015-09-21 21-Sep-15 0-21-2015	Use the Um-al-Qura calendar
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September 15	
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9:42:48 AM	
09:42	
03,42,40	
u	
	Field properties Date formats:

Typically, you can customize the **field properties (1)**, set **field options (2)**, and toggle the **MergeFormat** switch on or off **(3)**. When you are ready, click OK to insert the field.

The field will now be inserted. If you click it, you will see a command to update it:

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You can also use the F9 keyboard shortcut to update it. To lock the field to prevent it from being updated, press Ctrl + F11 with it selected. To unlock it, select it and press Ctrl + Shift + F11.

Field Categories

You can narrow down the fields that are being displayed using the Categories menu at the top of the Field dialog box:

Field		?	×
Please choose a field	Field properties		
Please choose a field <u>Categories:</u> (All) Date and Time Document Automation Document Information Equations and Formulas Index and Tables Links and References Mail Merge Numbering User Information AutoTextList BarCode Bibliography BidiOutline	Field properties Click the button below to set advanced field options Formula		
Compare CreateDate Database	✓ Preserve formatting during u	pdates	
Description: Calculate the result of an expr	ession		
F <u>i</u> eld Codes	ОК	Cano	el

Selecting a category will show only the related fields in the Field dialog box.

Астіvіту 5-3

Inserting Fields Using Quick Parts

In this activity, you will add fields to our annual report document.

1. Open Microsoft Word 2016 and open Activity 5-3:



2. Right-click the Date text on the first page. Click Remove Content Control:



3. Your cursor should still be at the top of the document. Click Insert \rightarrow Quick Parts \rightarrow Field:

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4. Click the Categories menu and click "Date and Time:"

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Field Please choose a field <u>Categories:</u> (All) <u>Date and Time</u> Document Automation Document Information Equations and Formulas Index and Tables Links and References Mail Merge Numbering User Information AutoTextList BarCode Bibliography	Field properties Click the button below to set advanced field options Formu <u>l</u> a	?	×
BidOutline Citation Comments Compare CreateDate Database v Description: Calculate the result of an express Fjeld Codes	Preser <u>v</u> e formatting during up	dates	el

5. Choose the Month-Year format and click OK:

Field	? ×
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Description: The date the document was created Field Codes	OK Cancel

6. The field will now be inserted. Ensure that it is selected and press Alt + F9 to view the field code:



7. Examine the field code. Can you identify the field name, properties, and switch?



8. Press Alt + F9 again to view the field results. Now, press Ctrl + F11 to lock the field to prevent it from updating. It won't look like anything has happened, but if you move your mouse over the Repeat arrow on the Quick Access toolbar, you will see that the command has been performed:



9. Save your document as Activity 5-3 Complete. Close Microsoft Word 2016 to complete this activity.

Summary

In this lesson, we learned how to insert different types of content using Quick Parts, including custom Quick Parts, building blocks, and fields. You should now feel comfortable adding all of these elements to a document.

REVIEW QUESTIONS

- 1. What are Quick Parts?
- 2. What are document properties based on?
- 3. What are the steps to saving a custom building block?
- 4. What is the command sequence to insert a custom cover page that was previously saved as a building block?
- 5. What is the shortcut key to lock a field to prevent it from updating?

LESSON 6: CONTROLLING TEXT FLOW

Lesson Objectives

In this lesson you will learn how to:

- Control paragraph flow
- Insert section breaks
- Insert columns
- Link text boxes to control text flow

TOPIC A: Control Paragraph Flow

When working with complex documents, you may need to fine-tune how text flows from one page to another. In this topic, we will learn how to set various text flow options using the Paragraph dialog.

Topic Objectives

In this topic, you will learn:

About the paragraph flow options in the Paragraph dialog

PARAGRAPH FLOW OPTIONS

To customize paragraph flow options, first select the text that you want to modify. Then, click the option button in the Paragraph group of the Home tab:

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The Paragraph dialog box will open. Now, click the "Line and Page Breaks" tab:

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Let's focus on the pagination options circled above. You will see checkboxes for the following items:

- Widow/Orphan control: Keeps a paragraph together so that single lines are not abandoned at the top or bottom of a page.
- Keep with next: Keeps the selected paragraph on the same page as the next paragraph.
- **Keep lines together:** Keeps a selection of text together and prevents it from being broken across pages.
- **Page break before:** Ensure that the selected text always appears on a new page.

Once you have set your options, click OK to apply them.

ACTIVITY 6-1

Controlling Paragraph Flow

In this activity, you will use paragraph options to control text flow in a workshop handout.

1. Open Microsoft Word 2016 and open Activity 6-1:



2. Scroll through the document. You can see that the pagination needs some help:

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	How to maintain healthy employee relations. How to make performance appraisals a cooperative <u>process.</u>	Page: 2 Session One: Course Overvi	
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Page 2 of 8 1159 words D8 1	10	- + 109	95

3. First, let's make sure that each session starts on its own page. Right-click the Heading 1 style in the Styles gallery and click Modify:

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4. Click Format \rightarrow Paragraph:

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5. Click the "Line and Page Breaks tab" if it is not already selected:

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<u></u>	-		
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(If this tab is selected, skip to the next step.)

6. Check the "Page break before" box and click OK:

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8. Now, let's see what our changes look like. Scroll through the first two pages and stop at page three:

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	Cens Case Study: Expansion Staffing	
	Case Study As the Director of Human Resources for KBH Video Stores in New York, Virginia Todd knew that he had her vork out of or her. Company management was moving forward with a goal of opening then new stores in hoview months. KBH already employed 400 people in 35 stores across the state in addition to the beadquarters stati of 31. Vagnita know that staffing the 10 new stores would equire hinting and training [] about 350 people. She left that her own small office was inadequately funded and staffed to handle this task. She sait a ther dark multiling over how to present a recommendation for her own staffing meeks. Note of her concerns was broaching the subject with her bons, hecause she had not officially been told of the oppanison plane. Virginia had leaves are than starting the badn't been told. Gene follow, the president of KBH, was noted for his autocraft is leadership style. Virginia had been varande auto on that leaves that he follow in define the tok now that he widt for here optionent who worked for him to follow orders without question. He was not an unkind person, though, and Virginia had always gotten along with nowne concern	1

9. You will see that the "Case Study: Expansion Staffing" title is abandoned on its own line. Select it as well as the contents of page four:



10. Click the option button in the Paragraph group of the Home tab:

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11. Click the "Line and Page Breaks tab" if it is not already selected:

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(If this tab is selected, skip to the next step.)

12. Ensure that the first three options in the Pagination section are checked. Click OK:

(If a box is shaded, it means that the setting is only applied to part of the text. Clicking the box will re-check it and apply the setting to all text.)

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13. You will see that the text is now kept together over two pages:



14. Scroll to page seven. Let's see if we can use the same setting to fix the pagination of this paragraph and table. Select the affected items that span two pages and click the option button in the Paragraph group of the Home tab:

15. The "Line and Page Breaks" tab should be open. (If not, click it to select it.) Ensure that the first three options in the Pagination section are checked and click OK:

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16. The problem is now fixed:

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Page 8 of 9 65 of 115	9 words 🛛 🕄 🐒	1									10	076 -	1	+ 109%

17. Save your document as Activity 6-1 Complete. Close Microsoft Word 2016 to complete this activity.

TOPIC B: Insert Section Breaks

Another useful feature for complex documents are section breaks. For example, a textbook like this one might use section breaks to set apart the different lessons. In this topic, you will learn how to insert and manage section breaks.

Topic Objectives

In this topic, you will learn:

- What sections and section breaks are and when to use them
- How to insert a section break
- About the types of section breaks
- How to work with headers and footers to create section titles

SECTIONS AND SECTION BREAKS

If you often create long, complicated documents, you'll probably find that **section breaks** will come in handy. Section breaks let you divide your document into independent sections, allowing you to apply different headers, footers, and formatting per section.

WHEN TO USE SECTION BREAKS

There are many useful applications for section breaks. One usage is to orient one or more pages in a different way than the rest of the document. For example, a workbook might have a few pages oriented in landscape to accommodate wide charts that wouldn't fit on a page with portrait orientation. You can also use section breaks to tell Word not to number the initial pages of a document (such as the cover page and table of contents).

INSERTING A SECTION BREAK

To insert a section break, click to place your cursor where you want the break to appear. Then, click Layout \rightarrow Breaks and choose what kind of section break you want to create from the bottom section of the menu:



The break will then be inserted. You can view it by showing hidden characters:

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TYPES OF SECTION BREAKS

There are four types of section breaks available in Microsoft Word.

Next Page	This command places a combination page and section break and moves the text to the next page.
Continuous	This section break can be placed anywhere within a page. Does not move text to a new page.
Even Page	Adds a section break and then jumps ahead to the next even numbered page in the document.
Odd Page	Adds a section break and then jumps ahead to the next odd numbered page in the document.

CREATING SECTION TITLES

Sections also allow you to identify different parts of a document with different headers and/or footers. This can help users navigate through the document, particularly if they are using accessibility tools like a screen reader. Creating section titles is just like creating regular headers and footers, except there are a few additional steps involved.

In this example, a new section has begun in the document, but it is still using the title from the previous section:



To resolve this, we will double-click in the header area to open the Header and Footer Tools – Design tab:

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Then, on the Header and Footer Tools – Design tab, we will click the "Link to Previous" command to toggle it off:

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Now, we can edit each header section independently:

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Notice that the header tags identify whether each header or footer is the same as the previous, or if it is a new title. You can repeat the "Link to Previous" command for each section title that you want to modify. Or, to re-link the headers or footers, click the command again.

ACTIVITY 6-2 Inserting Section Breaks

In this activity, you will use section breaks to improve the appearance of our workshop handout.

1. Open Microsoft Word 2016 and open Activity 6-2:



2. In order to work with section breaks, we should turn on formatting marks. Click Home \rightarrow Show/Hide:



3. Now, select the page break and the page character at the bottom of the first page. Press Delete on your keyboard:

Table of Contents¶

Session One: Course Overview	2¶
Session·Two:·Defining·Human·Resources	2¶
The Basics of HR Management	2¶
Case Study: Expansion Staffing	3¶
Session Three: Skills Inventory	5¶
Session Four: Forecasting	6¶
I	


4. Without moving your cursor, click Layout \rightarrow Breaks \rightarrow Next Page:

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5. The section break will now be inserted. Double-click in the footer area of the second page:

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			performing a skills inventory to conducting the interview; discuss orientation; and cover some issues that arise after the hiring (such as diversity issues, compensation, and discipline). If					
			Learning Objectives ¶					
			At the completion of this workshop, you will be expected to know and understand:					
			 The latest trends in the human resource field and the changing role of the human resource professional. 					
			 How-to-write-job-specifications and identify core competencies. 					
			 Methods-of-finding, selecting, and keeping the best-people using behavioral description. 					
			interviewing-techniques.¶					
			 How-to-get-employees-off-to-a-good-start. 					
			 → How-to-deal-with-compensation and benefits. ¶ 					
			 How-to-maintain-healthy-employee-relations. 					
			 → How-to-make-performance-appraisals-a-cooperative-process. ¶ 					
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Page 2	of 9 1159 w	ords DR 10		10 10 116	-	-	+ 109%	

6. The Header & Footer Tools – Design tab will become active. Deselect "Link to Previous:"



7. This will break the link between sections. Now, click Header & Footer Tools – Design \rightarrow Page Number \rightarrow Format Page Numbers:

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		🖻 🖸	urrent Pos	ition	•							
		En Er	ormat Pag	<mark>e Numbers</mark> ge Numbers	6							

8. The Page Number Format dialog box will open. Click the "Start at" radio button and ensure that "1" is displayed in the increment box beside it. This will tell Microsoft Word to re-start numbering at this section. Click OK:

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9. Your changes will be applied to the footer:



10. Click the Previous button on the Header and Footer Tools – Design tab.

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He	ader & Fo	ooter			Insert			Na	vigation		Options		Position	

This will take you to the footer for the first page and place your cursor in that area.

11. Click Header & Footer Tools – Design \rightarrow Page Number \rightarrow Remove Page Numbers:

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12. The footer will be removed from the table of contents page only. Close header and footer view:

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Page 1 of 9 1159 words []8 10	× 10	况 -	+ 1025

13. Click Home \rightarrow Show/Hide to hide formatting marks:

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14. Finally, scroll up to the top of page 1. Right-click the table of contents and click Update Field:

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15. When prompted, choose "Update page numbers only" and click OK:



16. The page numbers will now be properly displayed:

Table of Contents

Session One: Course Overview	1
Session Two: Defining Human Resources	2
The Basics of HR Management	2
Case Study: Expansion Staffing	3
Session Three: Skills Inventory	5
Session Four: Forecasting	6

17. Save your document as Activity 6-2 Complete. Close Microsoft Word 2016 to complete this activity.

TOPIC C: Insert Columns

Columns are another way to control the flow of text in your document. This is particularly useful for documents like newsletters and brochures. You can let Word set up the columns automatically, or you can customize their appearance.

Topic Objectives

In this topic, you will learn:

- How to format text as columns
- How to set column options

TEXT COLUMNS

To create columns, select the text that you want to format. Then, click Layout \rightarrow Columns and choose how many columns you want to create:

For Hore: Interd Deepsile Under spacing Margins: Directions Size Margins: Size <	⊟	5 • ₫	Ŧ		ZoomFoods - Word	Œ	-	o x
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Eget Company Description Image: More Columns SOD gram single-serve product • S2D gram family product • S2D day meal package • Sale day meal package • Sale day meal package • In-home parties • Door-to-door consultants Executive Summary Here we will summarize the business plan. Marketing and Sales Strategy Image: Sale Strategy Online Online				Left	Business Plan			
SOD gram single-serve product SOD gram family product ZSO gram family product SOD gram desser package SOD gram desser package Sorvice List Onor-to-door consultants Executive Summary Here we will summarize the business plan. Marketing and Sales Strategy Online				Right More <u>C</u> olumns	Company Description Product List			
Errivice List Door-to-door consultants Executive Summary Here we will summarize the business plan. Marketing and Sales Strategy Online 					 500 gram single-serve product 750 gram family product 800 gram dessert packages Mix and Match package 30-day meal package 			
Here we will summarze the business plan. Marketing and Sales Strategy					Evecutive Summary			
Social					Marketing and Sales Strategy Online Social Media			

The selected text will then be formatted according to the number and/or style of columns you have chosen:



TEXT COLUMN OPTIONS

If you don't like the preset column choices, click More Columns at the bottom of the Columns menu. The Columns dialog box will appear:

Co	lumn	s					?	Х
Pr	esets							
0								
	<u>O</u> n	e	T <u>w</u> o	<u>T</u> hree		<u>L</u> eft	<u>R</u> ig	jht
<u>N</u> ur	mber	of colum	ns: <mark>2</mark>	÷ 2		Line	e <u>b</u> etwee	n 6
W	idth a	nd spaci	ng	-		Previe	w	-
<u>c</u>	ol #:	Width:		Spacing:				
	1:	3"	÷	0.5" ≑	0			
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Арр	oly to:	Selecte	ed sectior	ns 🗸 7		Star	rt new co	lumn
						OK	Car	ncel

At the top of the dialog, you can choose a **preset (1)** column configuration. (This can be a useful starting point, and includes the same list that is offered in the Columns menu on the Layout tab.) You can also **manually enter the desired number of columns** in the appropriate text box **(2)**.

The next section of the dialog box (3) lets you customize the width and spacing for each column. You can also tell Word to create columns of equal width (4) and/or to add a line between columns (5). All of your choices will be shown in the preview area (6). As a final note, you can use the **"Apply to" menu (7)** to choose what part of the document the columns will be applied to. Your options include particular sections, a selection of text, or the entire document.

Once you have finished setting your options, click OK to apply them.

ACTIVITY 6-3

Inserting Columns

In this activity, you will format text as columns.

1. Open Microsoft Word 2016 and open Activity 6-3:



2. Scroll to the bottom of the third page. Select the text "Pros" and "Cons:"

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→ Cut Palatino Linot, • 111 • A* A* → Copy B Pate → Format Painter Clubbard 5	Aa / シード・ビー 短目 対「 AaBbCct AaBbCc AaBbC AoBbC AOBbC AOBbC ACt AaBbCct	AdbC AabbCcE Subtitle Subtle Em	AaBbCcL Emphasis	P Find ▼ ab Replace Select ▼ Folding	
Ugenoni u rem	 respen spen 			coung	
	Discuss the prov and cons of being a human resource professional. Pros Cons <u>T</u>				
	Case Study: Expansion Staffing				
	Case Study As the Director of Human Resources for KBH Video Stores in New York, Virginia Todd knew that the had have work cut out for her. Company management was moving forward with a goal of opening ten new stores in twelve months.				
Page 3 of 9 1159 words 108 10				+ 109	66

3. Now, click Layout \rightarrow Columns \rightarrow More Columns:



4. The Columns dialog will open. Select Two from the Presets section at the top:

Columns		?	×
Presets	Left	Righ	I
Number of columns:	Preview	between /	
Apply to: Selected text	OK Start	new colu Cano	umn cel

5. Check the "Line between" box:

Columns				? ×
Presets				
<u>O</u> ne	T <u>w</u> o	Three	<u>L</u> eft	<u>R</u> ight
Number of 0 Width and Col #: W 1: 3 2: 3	columns: 2 I spacing /idth: 		Previe	e <u>b</u> etween w
Equal •	column width			
Apply to:	Selected text	\sim	Star	t new column
			OK	Cancel

6. Ensure that the "Apply to" menu says "Selected text" and click OK:

Columns	? ×
Presets	Left Right
Number of columns: 2 Width and spacing Col #: Width: Spacing: 1: 3* 2: 3* 2: 3* 4 4 4 4 4 4 4 4 4 4 5 5 6 4 1 5 1 4 1 4 1 4	Preview
Apply to: Selected text	OK Cancel

The text will now be formatted as columns. Click after the word "Pros" and press Shift + 7. Enter three times to lengthen the line:

Discuss the pros and cons of being a human resource professional.

Pros	Cons
1	
/	

Now, scroll to the sixth page of the document. Select the bulleted list and click Layout \rightarrow 8. Columns \rightarrow Left:

E 5 · C = Activity 6-3 - Word			-	n ×
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Image Image <th< td=""><td></td><td></td><td></td><td></td></th<>				
Page S One Is Arrange				^
Two				
There				
Session Three: Skills Inventory				
One of the buzz words out in the marketplace right now is emotional intelligence. In simple				
Right terms, that really means making the most of the knowledge, skills, and abilities of your				
employees.				
How? By doing a skills inventory, for starters. A skills inventory evaluates an employee's:				
Knowledge				
Skills				
Abilities				
Qualifications				
Interest				
Motivation to learn new skills				
Future plans (retirement, advancement)				
Attitude				
Page 6 of 9 15 of 1159 words 🛛 🕼 🛅	90 III	- 50		+ 109%

9. The formatting will now be applied:

How? By doing a skills inventory, for starters. A skills inventory evaluates an employee's:

- Knowledge
- Interests

Skills

- Motivation to learn new skills .

- Abilities
- Future plans (retirement, advancement) •

•

- Qualifications
- Attitude •
- Save your document as Activity 6-3 Complete. Close Microsoft Word 2016 to complete 10. this activity.

TOPIC D: Link Text Boxes to Control Text Flow

If you're creating a story type of document (such as a newsletter), you can create multiple text boxes and link them. This way, when there is too much text for one text box, it will overflow into the other box. In this lesson, you will learn how to use linked text boxes.

Topic Objectives

In this topic, you will learn:

- How to link text boxes
- How to insert text from a file

LINKED TEXT BOXES

To link text boxes, click the first box. (Notice how in this example, there is currently too much text in the first text box to be displayed.) Then, click Drawing Tools – Format \rightarrow Create Link:

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	Constants Const	

Now, click a second, empty text box:

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Tay Hore and Darger	Vertex Vertex	S Height S Width S	2.17" 4.68" #	Sher

Now the boxes will be linked. Notice how the text flows from one box to the next:

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File Home Insert Design	Layout References Mailings Review View	Format Q Tell me what you want to do				Sign	in A Share
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	Themes and styles help: you click Design and cho and SmartArt graphics of When you apply styles theme. Save time in No you need them. To cham	eep your document coordinated. When see a new Theme, the pictures, charts, ange to match your new theme. our headings change to match the new d with new buttons that show up where se the way a picture fits in your					
	document, click it and a	uuton for layout options appears next to	it. When you work on a table, click whe a row or a column, and then click the pl	re you want to add			

(If there is still too much text for the second box, you will be able to continue linking to additional text boxes.)

To break the link, select the first linked box and click the Break Link command on the Drawing Tools – Format tab:

		Drawing Tools Using Microsoft Office 2016 - Word	
File Home Insert Design	Layout References Mailings Review View	Format 👰 Tell me what you want to do	
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Insert Shapes	Shape Styles	Ta WordArt Styles Ta Text	43

Following this action, all text will now be moved back to the original text box (or back one box in the chain, if multiple text boxes are linked).

INSERTING TEXT FROM A FILE

Although you can copy and paste text between programs, you may occasionally find it easier to insert the text directly from the file.

To do this, place your cursor at the location in your current Word document where you want the inserted text to go. (You can choose any place in the document, including a text box.) Then, click Insert \rightarrow Object \rightarrow Text from File:

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Fi		Inset	Design																				A Share
Covi Page	Fages	Table * Tables	Pictures 0	Mine Shapes Sm itures	artArt Char Ions	Screenshot	🚔 Store 🎝 My Ar	Mid-ins - Wikip Add-ins	7 Cellin Video Medi	Hyperlei	k Bookmark Links	Cross- reference	Connerts	Header Footer Header at No Header & No	Page umber =	Test Quict Box+ Parts	A A WordArt Dr City Text	Signature Lin Date & Time Digect *	ne 7	πΩ Equation Symbol			,
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When the Insert File dialog appears, browse to your file, select it, and click Insert. (You may need to select your file type from the menu in the bottom right-hand corner of the dialog box.) Here, we will insert text from a plain text document:

🛯 Insert File					×
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Range:	Range				
File name: Ke	yboard Shortcuts		~	All Files	~
			Tools 👻	Insert 🔽 Car	ncel

The text from the file will then be inserted and the original file formatting should mostly be intact (which in this case is no formatting at all). You can now format and edit the text as you normally would in Word:

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ACTIVITY 6-4 Linking Text Boxes

In this activity, you will use your training document to create a brochure.

1. Open Microsoft Word 2016 and open Activity 6-4A:



Activity 6-4A Microsoft Word Document 101 KB **2.** Ensure that you are viewing the second page of the document. Click to place your cursor in the text box on the left-hand side:



3. Now, let's insert our Course Overview and Course Objectives from the handout. We've already saved it as a separate file, so click Insert \rightarrow Object \rightarrow Text from File:

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	Pages		Tables			Illustrations				Add-ins		Media		Links		Comments	Hea	der & F	aater				Text	Object	Sym	bols	~
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4. Use the Insert File dialog to browse to your Exercise Files folder. Locate the Activity 6-4B file. Select it and click Insert:



5. The text will be inserted. However, you can see that there is too much text for this text box. To resolve this, let's link it to the second box. With the first text box still selected, click Drawing Tools – Format → Create Link:



6. Your cursor will turn into a pouring icon. Click the second text box:



7. The overflow text will be inserted:

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8. Clearly we still have some adjusting to do. Click the first text box and resize it lengthwise so that there is room for the entire Course Overview section:

HR Training



(such as diversity issues,

compensation, and discipline).

.....

262 of 385

9. Finally, select the bullets in the second text box. Apply the Times New Roman font so that this text matches the rest of the document:



10. Resize this text box to fit the text:



11. We can leave the third text box blank as an image will be added there later. Save your document as Activity 6-4 Complete. Close Microsoft Word 2016 to complete this activity.

Summary

In this lesson, you learned different ways to control text flow in a document. We explored the different options in the "Line and Page Breaks" tab of the Paragraph dialog. We also learned how to use section breaks, columns, and text boxes to lay text out in different ways. You should now feel comfortable controlling text flow using a variety of tools in all types of documents.

REVIEW QUESTIONS

- 1. How do you open the Paragraph dialog box?
- 2. What is the command sequence to format a selected block of text into three columns?
- 3. Name two types of section breaks available in Microsoft Word.
- 4. What is the command sequence to insert text from a file?
- 5. Which tab contains commands to create and break text box links?

LESSON 7: USING TEMPLATES

Lesson Objectives

In this lesson you will learn how to:

- Create a document using a template
- Create and manage templates

TOPIC A: Create a Document Using a Template

Microsoft Word provides hundreds of pre-designed documents called **templates**, such as letters, brochures, and reports. You can take these documents, add your own information, and have a completed file within minutes. In this topic, we will learn all about this useful tool.

Topic Objectives

In this topic, you will learn:

- About templates in Word
- How to create a document from a template
- Where templates are stored on your computer and how to view them

TEMPLATES IN WORD

A **template** is a document that contains preformatted styles, graphics, objects, and/or sample text. Its purpose is to provide a method of laying out content to save you time and help you keep your documents consistent. Templates can be used with styles and themes to provide even more customization options.

Microsoft Word templates are saved as .**dotx files**. This way, they can be re-used without overwriting the template contents. You can also save templates with macros using the **.dotm** extension.

Types of Templates

There are two main types of templates that Microsoft Word uses. The templates that we will be interacting with are called **document templates**, which focus on the formatting and layout of a particular file. Microsoft Word also uses a template called Normal.dotm to remember settings like your default font size, program options, and more.

Content Controls

Many templates feature **content controls**, which are placeholders that include important document information for you (or make it easy to do so). For example, this date placeholder allows us to easily choose what date to display:

E <u>5 · 0</u> =	Letter - Word	∞ – □ ×
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CREATING A DOCUMENT FROM A TEMPLATE

To create a document from a template, click File \rightarrow New:



With the New category displayed, you will see a **list of templates (1)** in the middle pane. There is also a **search box (2)** with **suggested search links (3)** at the top of the window:



(Note that Internet access is recommended for the best results.)

If you see a template that you like, move your mouse over it and click the pin icon to keep it at the top of the templates displayed in the New category:

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Open	Search for online templates		م				
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You can always click this icon again to unpin it.

To create a document from any template, click its thumbnail. With any template except "Blank document," you will then see additional information about the template:



You can click the left or right arrows to preview different templates, or click Create to download the template and open it as a Word document, ready for editing. This is the option we have chosen for this example:



VIEWING PERSONAL TEMPLATES

To view templates that you have saved to your computer, click the Personal link in the New category of Backstage view:

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Info	New		
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Open	Search for online templates		J
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Options	Blank document	Welcome to Word 🛛 🔻	Banded design (blank)

Templates stored in your user account will now be displayed. Click the desired file to create a new document from it:

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Info	New
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TEMPLATE STORAGE LOCATIONS

Your personal templates are typically saved in C:\Users\<Your User Name>\Documents\Custom Office Templates. Templates that are included with Microsoft Word, or that have been downloaded locally, are saved in C:\Users\<Your User Name>\AppData\Roaming\Microsoft\ Templates.

ACTIVITY 7-1

Creating a Document Using a Template

In this activity, you will set up a scorecard using a template. Internet access is required for this exercise.

- **1.** To begin, open Microsoft Word 2016.
- 2. On the Start screen, click the Open Other Documents link to switch to Backstage view:



3. Click the New category:



4. In the search field, type "football scorecard." Click the magnifying glass to perform the search:

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5. One result should appear. Click its thumbnail to select it:

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6. Click Create to confirm the process:

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cipori	2			0	1	2	3	4	5	6	7	8	9	scores above.				
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7. The template will download and open. Enter the name of your favorite football team on the left-hand side:



(You can use our sample team name, Acme Ravens, if you can't think of anything.)

8. Type in "Coolsville Cup" for the game title and "2020" for the year:



9. Type "Bedrock Boulders" for the top team name:



10. Let's customize the document a bit more. Click Design \rightarrow Themes \rightarrow Banded:



11. Now, click the Table Tools – Design tab and pick a new style for the table:



12. Click File \rightarrow Save As \rightarrow Browse:

Save As	
Other Web Locations	
This PC	
Add a Place	
Browse	6
	Save As Other Web Locations Image: Display state Image: Display state

13. The Save As dialog box will open. Notice that the file type defaults to a regular Microsoft Word document. Save the file to your desktop as Activity 7-1 Complete:

🔃 Save As				×
← → → ↑ 🛄 > This PC > Desktop		ٽ ~	Search Desktop	Q
Organize 🔻 New folder				
Quick access Desktop Downloads P	55011_Word_2016_2_ExerciseFil			
File name: Activity 7-1 Complete				~
Save as type: Word Document				~
Authors: Acme Widgets	Tags: Add a tag	Title: Football pool sco	recard	
Maintain compatibility with previous versions of Word	Save Thumbnail			
Hide Folders		Tools 👻	Save	Cancel

14. When prompted to convert the file, click OK:

Microsoft Word	?	×		
Your document will be upgraded to the newest file format. While you'll get to use all the new features in Word, some minor layout changes are possible. If you prefer not to upgrade, press cancel and check the maintain compatibility checkbox.				
Do not ask me again Tell Me More OK	Ca	ncel		

15. Close Microsoft Word 2016 to complete this activity.

TOPIC B: Create a Template

Once you have become comfortable using pre-defined templates, you can begin constructing your own templates and using them to create new documents. In this topic, you will learn how to create, modify, and manage templates.

Topic Objectives

In this topic, you will learn:

- How to create a new template
- How to modify an existing template
- How to attach a template to a document
- About the Organizer
- About the default template location

CREATING A NEW TEMPLATE

If you want to create your own template, it's easy! First, create the document with placeholder information. For example, if you are creating a letter template, you might want to include the company name and information, but leave the other fields blank:

B 5.0 -	Letter Template - Word	œ - □ ×
Home Inset Design Layout Image: Second Secon	Address Maining Norm Yes Yes	bloCcl_daBbCcl_AaBbCci phasis Intense EStrong v Find v Select v Find v Select v Find v Select v Find v Select v
Aggt Laf 1 Uzbanda DF 100	Arme Widgets Inc. a665 Meadowcreat Lane Lesington, KY eggor [Date] Recipient Name] Street Address] [Street Address] [City, ST ZIP Code] Dear [Recipient Name]: Do bahalf of everyone at Arme Widgets, thank you for choosing [Name of product or streice] for your needs. [Name of product or service] includes the following excellent [features or benefits]: Peature or benefits]: Peature or benefits] Peature or benefits] Peature or benefits] Freature or benefits] Freature or benefits] Meator on breated to providing you with the highest level of customer satisfaction possible. If for any reason, you have questions or comments, we are delighted to hear fromyous. Call or tuel-free number, 3-80-WIDGETS, so send us email at hours. Again, thank you for your patronage. We look forward to serving you. Sincerely,	第 副 称+ 106
Once relevant information has been placed in the template, save it by clicking File \rightarrow Save As \rightarrow Browse:



The Save As dialog will open. First, click the "Save as type" menu and choose Word Template:



This will automatically choose the correct file location for you. Now, enter a file name and click Save:

-									
Save As									×
← → ∽ ↑ 📘	« Local Disk (C:)) > Users > Acme V	/idgets → Docum	nents → Custom Offic	ce Templates	√ Ö	Search Custor	m Office Ter	mpla 🔎
Organize 🔻 Nev	w folder								• ?
📌 Quick access	Name	^		Date modified	Туре	Size			
E Desktop	*			No items mat	ch your search.				
👆 Downloads	*								
Documents	*								
E Pictures	*								
👌 Music									
📑 Videos									
Microsoft Word									
i OneDrive									
💻 This PC									
💣 Network									
•4 Homegroup									
File name:	Letter Template								~
Save as type:	Word Template								~
Authors:	Acme Widgets		Tags: Add a tag)	Title:	Thank you to new	customer		
[Save Thumbnai	il							
Hide Folders						Tools 🔻	Save	C C	ancel

Saving the file in the default location will ensure that it is displayed in the Personal category of the New category in Backstage view:

¢	
Info	New
New	
Open	Search for online templates
Save	Suggested searches: Business Personal Industry Print Design Sets Education Event
Save As	FEATURED PERSONAL
Print	
Share	
Export	
Close	
Account	
Options	Letter Template

MacroButton Fields

You can also use fields to make using templates even easier. To begin, place your cursor where you want the field to go. Then, click Insert \rightarrow Quick Parts \rightarrow Field:

						Letter Template - V	Nord							
File	Home	Insert	Design Layout References Mailings	Review View Q Tell me										
Cove Page	Blank Page Bre	ge Table	Pictures Online Shapes SmartAtt Chart Screenshol	🗎 Store W Store Wikipedia	Online Video	Hyperlink Bookmark	Cross- reference	Comment	Header Footer	Page Number *	A Text Box *	Quick WordAr	A Si Torop Cap - O	ignature Line 👻 late & Time Ibject 👻
-	Pages	Tables	Illustrations	Add-ins	Media	Links		Comments	Header & Fo	ooter		MutoText		•
												Documen	t Property	•
												(=) Eield		
												📑 Building B	llocks Organize	f
												Save Selec	tion to Quick P	Part Gallery

In the Fields dialog box, locate and select the MacroButton category:

Field	?	×
Please choose a field	Field properties	
(AII)	Click the button below to set advanced field options	
Field names: IncludePicture IncludeText Index Info Keywords LastSavedBy Link ListNum MacroButton MergeRec MergeRec MergeSeq Nert	, oundia	
Next Nextif NoteRef NumPages NumWords V Description: Calculate the result of an expre	Preserve formatting during updates	21

Now, you can choose the desired action and set the display text. Click OK:

Field		? ×
Please choose a field <u>Categories:</u> [All] <u>Eield names:</u> IncludePicture IncludeText Index Info Keywords LastSavedBy Link ListNum <u>MargoBitton</u> MergeField MergeRec MergeSeq Next Next NoteRef NumChars NumPages NumWords Description: Run a macro	Field properties Display text; Double-click here to run the Accessibility Macro name: AcceptAllChangesinDocAndStopTrac AcceptAllChangesinDocAndStopTrac AcceptAllChangesShown AcceptAllCongesAndAdvance AcceptConflictsnDoc AcceptConflictAndAdvance AcceptConflict	Field options No field options available for this field
Field Codes		OK Cancel

The field will be inserted and will run the related command when double-clicked:



MODIFYING A TEMPLATE

To modify a template, click File \rightarrow Open \rightarrow Browse:



In the Open dialog box, navigate to the location of the template file, select it, and click Open:

🔄 Open										×
$\leftarrow \rightarrow \vee \uparrow$	« Loca	al Disk (C:) > Users > Acme Wi	dgets → Docu	ments → Custom Offi	ce Templates	~ Ū	Search Custom	Office Te	empla	9
Organize 🔻 Nev	v folder									?
🖈 Quick access		Name		Date modified	Туре	Size				
E. Desktop	*	📳 Letter Template		9/21/2015 2:29 PM	Microsoft Word T	28	KB			
Downloads	*									
Documents	*									
	~									
📕 Videos										
🔃 Microsoft Word										
🕿 OneDrive										
🛄 This PC										
💣 Network										
🔩 Homegroup										
	File nan	ne: Letter Template				~	All Files			\sim
						Tools 👻	Open -		Cancel	

(If you cannot see your template file, ensure that the filter above the Open button is set to All Files.)

If you are using File Explorer to open the file, double-clicking a template will open a new Word document based on the template, not the actual template itself. In order to open the template for modification, right-click the template file and click Open:

Letter Template	New		rosoft Word T	28 KB
	Open	Ν		
	Print	43		
	Open with			
	Share with	>		
	Restore previous versions			
	Send to	>		
	Cut			
	Сору			
	Create shortcut			
	Delete			
	Rename			
	Properties			

With either of these actions, the template file will open and let you make changes. Word's title bar will display the template name (not Document1, Document2, etc.):



ATTACHING A TEMPLATE TO A DOCUMENT

If you have older files that you would like to update with a new template, Word can apply the formatting of a template to an existing file, saving you the trouble of recreating the old files.

First, make sure the Developer tab is visible. You can enable this tab by clicking File \rightarrow Options \rightarrow Customize Ribbon. Then, in the list on the right-hand side, check Developer. Click OK to apply the change:

Word Options						?	×
General	Customize the Ribbon and	keybo	oar	d shortcuts.			
Display	Choose commands from:				Customize the Ribbon: (1)		
Proofing	Popular Commands		\sim		Main Tabs		
Save	•	_					
Language	Accept Revision	•	^		Main Tabs □ ☑ Home		
Advanced	Align Left						
Customize Ribbon	Bullets Center	•			⊞ Font ⊞ Paragraph		
Quick Access Toolbar	Change List Level Copy Copy Cut	•			E Styles		
Add-Ins	Define New Number Format						
Trust Center	🏷 Delete						
	Draw Table				T References		
	III Draw Vertical Text Box						_
	Find			<u>A</u> dd >>	E Review		
	Fit to Window Width			CC Remove	E View		ΞI
	Font	1-		ss Welliove	T Developer		-
	A Font Color						
	A Font Settings	Ĩ.			Blog Post		
	AB ¹ Footnote	x			E VInsert (Blog Post)		
	💉 Format Painter				E 🗹 Outlining		
	A Grow Font						
	Hyperlink						
	Insert Page Section Breaks	►					
	Insert Picture				New Tab New Group Rename	1	
	Insert Text Box		~				
					Customizations: Reset -		
	Keyboard shortcuts: Cus <u>t</u> omize				Import/Export 🔻 🛈		
					ок	Cance	el

Now open the old document you want to enhance with the new template. Click Developer \rightarrow Document Template:

H	ട - ഗ	÷										Old Lette	er for Services	- Word
File	Home	Insert	Design	Layout	Refer	ences	Mailing	s Review	View	Develope	er ₽	Tell me w	hat you want	to do
Visual Basic	Macros	cord Macro use Recordi acro Securit	ng Add- ins	Word Add-Ins	COM Add-Ins	Aa A	• 🛋 📁 ; 🗈 📑	Design Mode Properties	XMI	L Mapping Pane	Block Authors	Restrict Editing	Document Template	
	Code			Add-Ins			Cor	ntrols	N	lapping	Pro	tect	Templates	6

The Templates and Add-ins dialog will appear. Click the Attach button:

Templates ar	nd Add-ins				?	×
Templates	XML Schema	XML Expansion Packs	Linked CSS			
Document <u>t</u>	emplate					
Normal					<u>A</u> ttacl	1
Autom	atically <u>u</u> pdate o	document styles				43
Attach	to all new e-ma	il messages				
<u>G</u> lobal temp	plates and add-in	ns				
Checked in	tems are current	ly loaded.				
				\sim	A <u>d</u> d.	
					Remo	ve
				\sim		
Full path:						
	_					
Organizer			0	К	Car	ncel

Choose the template that you want to attach to the document and click Open:

🔃 Attach Template							×
← → • ↑ 📘	> This	PC > Documents > Custom Office Templates	•		~ ⊽	Search Custom Office Templa ,	P
Organize 🔻 Ne	w folder					== • •	?
📌 Quick access		Name	Date modified	Туре	Size		
📃 Desktop	*	🗐 Letter Template	9/21/2015 2:29 PM	Microsoft Word T	28	КВ	
🖶 Downloads	*						
Documents	*						
Pictures	*						
Ji Music							
Microsoft Wor	в						
a OneDrive							
💻 This PC							
igen Network							
• 4 Homegroup							
	File nam	e: Letter Template			~	All Word Templates	~
					Tools 👻	Open Cancel	

Back in the Templates and Add-ins dialog, check "Automatically update document styles" and click OK:

Templates and	d Add-ins				?	×
Templates	XML Schema	XML Expansion Packs	Linked CSS			
Document <u>t</u> e	mplate cme Widgets\D	ocuments\Custom Office	e Templates\Le	tter Tı	<u>A</u> ttach.	
Automa	tically <u>u</u> pdate c o all new e-mai	locument styles il messages				
<u>G</u> lobal templ	ates and add-ii	ns				_
Full path:	ems are current	ly loaded.		<	A <u>d</u> d Remov	2
<u>O</u> rganizer]		0	к	Cano	:el

The old document will now be using the components defined in the template. You will likely need to do some tweaking, but the basic elements should be intact.

MANAGING TEMPLATES WITH THE ORGANIZER

You can also copy individual styles from a template to a particular document. To begin, ensure that the Developer tab is displayed. Then, click Developer \rightarrow Document Template:

H	- رې	Q	÷										Old Lette	er for Services - Word
File	Hom	ıe	Insert	Design	Layout	Refer	ences	Mailing	s Review	View	Develope	er Q	Tell me w	hat you want to do
?		Rec	ord Macro se Recordii	ng State	0		Aa 🖌	Aa 🚬 📁	Design Mode	2				
Basic	Macros	Ma	ro Security	Add- ins	Word Add-Ins	Add-Ins		-	Group -	XM	Pane	Authors	 Restrict Editing 	Template
	C	ode			Add-Ins			Cor	ntrols	- N	lapping	Pro	tect	Templates 🗸

In the Templates and Add-ins dialog, click Organizer:

Templates and Add-ins		?	×
Templates XML Schema XML Expansion Packs Linked CSS			
Document <u>t</u> emplate			
e Widgets\Documents\Custom Office Templates\Letter Templat	e.dotx	<u>A</u> ttac	h
Automatically update document styles			
Attach to all new e-mail messages			
Global templates and add-ins			
Checked items are currently loaded.			
	\sim	A <u>d</u> d	
		Remo	ve
	~		
Full path:			
Organizer	ок	Ca	ncel

The Organizer dialog will appear:

Organizer			?	×
Styles Macro Project Items				
In Old Letter for Services:	U	I <u>n</u> Normal:		
Address Balloon Text cc:/Enclosure Closing Date Default Paragraph Font Footer Header	Copy Delete Rename	Default Paragraph Font No List Normal Table Normal	2	<
Styles a <u>v</u> ailable in:		Styles availa <u>b</u> le in:		
Old Letter for Services (Document)	~	Normal.dotm (global template)		\sim
Cle	ose <u>F</u> ile		Clos <u>e</u> I	File
			Clo	ose

Your **current document** should appear on the left **(1).** On the right, you will see all styles that have been saved in **Normal.dotm (2)**, the document template for all new blank documents opened in Word. You can use the **drop-down menus and the Close File buttons (3)** for each list to modify the

document whose styles are being displayed. Once a style is selected, you can use the buttons **in the middle of the dialog (4)** to copy them between templates, as well as delete or rename a style.

For example, let's close the Normal template:

Organizer				?)
Styles Macro Project Items				
In Old Letter for Services:			I <u>n</u> Normal:	
Address Balloon Text cc/Enclosure Closing Date Default Paragraph Font Footer Header	~	Copy Delete Rename	Default Paragraph Font No List Normal Table Normal	
Styles available in:			Styles availa <u>b</u> le in:	
Old Letter for Services (Document)	\sim		Normal.dotm (global template)	`
Description	Close <u>F</u> ile			Clos <u>e</u> File
				Close

We can now click Open File to choose a new template:

Organizer			? ×
Styles Macro Project Items			
In Old Letter for Services:			
Address Balloon Text cc:/Enclosure Closing	^	Copy Delete	^
Default Paragraph Font Footer Header	~	<u>R</u> ename	~
Styles a <u>v</u> ailable in:		Styles availa <u>b</u> le in:	
Old Letter for Services (Document)	Close <u>F</u> ile		Op <u>e</u> n File
Description			
Space After: 0 pt, Style: Show in the Styles g Based on: Normal	allery		
			Close

Now, we can use the Open dialog to select the template whose styles we want to view:

→ • ↑ 📘	> This	PC > Documents > Custom Off	ice Templates		√ Č	Search Custom Office Templa	Q
rganize 👻 New	/ folder					:== ▾ Ⅲ	?
🖈 Quick access		Name	Date modified	Туре	Size		
E Desktop	*	Letter Template	9/21/2015 2:29 PM	Microsoft Word T	28	KB	
	A						
🔮 Documents	A						
Pictures	*						
Music							
Microsoft Word							
🖀 OneDrive							
This PC							
Network							
Homegroup							
	File nam	ne: Letter Template			~	All Word Templates	~
						Oran Cravel	

The styles from this template will now be shown in the Organizer. Let's copy some of these styles to our current template:

Organizer				?	Х
Styles Macro Project Items					
To Old Letter for Services: Address Balloon Text cc/Enclosure Closing Date Default Paragraph Font Encter	^	<- <u>C</u> opy Delete Rename	In Letter Template: Default Paragraph Font Footer Header Heading 1 List Paragraph No List Normal		^
Header Styles available in:	*		Placeholder Text Styles available in:		~
Old Letter for Services (Document)	\sim		Letter Template (Template)		\sim
Description	Close <u>F</u> ile			Clos <u>e</u> F	ile
				Clo	se

(Note that you will be prompted to confirm delete operations, as well as copy operations if a style with the same name already exists.)

When we are finished modifying the styles, we'll click Close to close the Organizer. The document styles will now be updated.

THE DEFAULT TEMPLATE LOCATION

By default, user-created templates are saved in C:\Users\<Your User Name>\Documents\Custom Office Templates. You can change this location in the Save category of the Word Options dialog box:

Word Options		?	×
General	Customize how documents are saved.		
Display			
Proofing	Save documents		
Save	Save files in this <u>format</u> : Word Document (*.docx)		
Language	Save AutoRecover information every 10 🚔 minutes		
Advanced	Keep the last autosaved version if I close without saving		
Customize Ribbon	AutoRecover file location: C:\Users\Acme Widgets\AppData\Roaming\Microsoft\Word\	Browse	
Quick Access Toolbar	Don't show the Backstage when opening or saving files		
	Show additional places for saving, even if sign-in may be required.		
Add-Ins	Save to <u>C</u> omputer by default		
Trust Center	Default local file location: C:\Users\Acme Widgets\Documents\	Browse	
	Default personal templates location: C:\Users\Acme Widgets\Documents\Custom Office Templates\		
	Offline editing options for document management server files		_
	Save checked out filer to (1)		
	O The server drafts location on this computer		
	The Office Document Cache		
	Server drafts location: C:\Users\Acme Widgets\Documents\SharePoint Drafts\	Browse	
	Preserve fidelity when sharing this document:		
	Embed ronts in the file U		
	\square Embed only the characters used in the document (best for reducing hie size)		
	E bo for emora common system rones		
	ОК	Car	ncel

ACTIVITY 7-2

Creating a Template

In this activity, you will create a template. You will also add styles to it and modify the existing styles.

1. To begin, open Microsoft Word 2016 and open Activity 7-2A:



(Notice that this is a regular Microsoft Word document.)

2. Examine the formatting in the document:



3. Now, we need to enable the Developer tab. Right-click a blank area of the ribbon interface and click "Customize the Ribbon:"

H	5 - O		÷								Activity 7-2	A - Word
File	Home	Inse	rt Design	Layout	References	Mailings	Review	View	Q Tell	me what you	want to do	
	K Cut		Calibri Light (H	• 26 • A	A A	♦ 🗄 • 🗄	* [*] a_1 1-	€≣ ₹≣	2↓ ¶	AaBbCcDc	AaBbCcDc	AaBbC
Paste	💉 Format Pai	nter	В <u>I</u> <u>U</u> -	abe X ₂ X ²	🔉 - 🎽 - 🔒	▲ - <u>A</u> dd (Group to Q	uick Acces	ss Toolbar		¶ No Spac	Heading 1
	Clipboard	Es.		Font		r <u>C</u> usto	mize Quic	k Access T	oolbar			
						Show	Quick Ace	cess Toolb	ar Below the	Ribbon		
						Custo	mize the <u>F</u>	Ribbon		N		
						Colla	pse the Rib	obo <u>n</u>		13		

4. The Word Options dialog box will open to the Customize Ribbon category. In the list on the right-hand side, check Developer. Click OK to apply the change:

d Options						?	>
eneral	Customize the Ribbon and k	keybo	oar	d shortcuts.			
splay	Chaosa commands from:				Customize the Pibbon()		
oofing	Popular Commands	_	\sim		Main Tabs	~	
ve							
nguage	Accept Revision	•	^		Main Tabs		
vanced	Align Left				Clipboard		
tauria Dibban	Bullets				⊞ Font		
tomize Ribbon	Center				Paragraph		
ick Access Toolbar	Change List Level				🗄 Styles		
	Cut						
i-ins	Define New Number Format						
st Center	🏹 Delete						
	🔣 Draw Table						
	Draw Vertical Text Box				E Mailines		
	Email O Find			Add >>			
	Eit to Window Width						-
	Font	1-		<< <u>R</u> emove		1	
	A Font Color						
	A Font Settings				E Add-ins		
	Font Size	١×			E O blog Post		
	AB FOOTNOTE				E Outlining		
	A Grow Font				E Cutining		
	Hyperlink				E Dackground Kemoval		
	5 Insert Comment						
	Insert Page Section Breaks	Þ				_	
	All Insert Picture				New Tab <u>N</u> ew Group Rename		
			۷		Customizations: Reset		
	Keyboard shortcuts: Customize				Import/Export V		
					OK N	Ca	ance

5. Now, click Developer \rightarrow Document Template:

⊟												Acti	vity 7-2A - Word	
File	Home	Insert	Design	Layout	Refer	ences	Mailing	s Review	View	Develop	er 🛛 🖸	Tell me w	hat you want to do	
Visual Basic	Macros	cord Macro use Record acro Securi	o ding Add- ins	Word Add-Ins	COM Add-Ins	Aa A	ka ा 🧊	Design Mod	e XM	L Mapping Pane	Block Authors	Restrict Editing	Document Template	
	Code			Add-Ins			Cor	ntrols	- N	lapping	Prot	tect	Templates 13	

6. The Templates and Add-ins dialog will open. Click Organizer:

Templates and	I Add-ins				?	×
Templates	XML Schema	XML Expansion Packs	Linked CSS			
Document <u>t</u> e	mplate					_
Normal					<u>A</u> ttach.	
Automat	tically <u>u</u> pdate o	locument styles				
Attach t	o all new e-ma	il messages				
<u>G</u> lobal templ	ates and add-ii	15				
Checked ite	ms are current	ly loaded.				_
				\sim	A <u>d</u> d	
					Remov	e
				~		
Full path:						
Organizer			C	K	Can	cel

7. The Organizer will open. Click the Close File button on the right-hand side of the dialog:

Organizer				?	×
Styles Macro Project Items					
In Activity 7-2A:			I <u>n</u> Normal:		
Default Paragraph Font Heading 1 Heading 2 Heading 3 No List Normal Table Normal Title	< >	Copy Delete Rename	Defauit Paragraph Font No List Normal Table Normal		< >
Styles available in:			Styles availa <u>b</u> le in:		
Activity 7-2A (Document)	\sim		Normal.dotm (global template)		\sim
Description	Close <u>F</u> ile			Clos <u>e</u>	File
				CI	ose

8. The button will now say Open File. Click it:

Organizer		?	×
Styles Macro Project Items			
In Activity 7-2A:			
Default Paragraph Font 🔗	Сору		\sim
Heading 1 Heading 2			
Heading 3	Delete		
No List Normal	Rename		
Table Normal			
Title			~
Styles available in:	Styles availa <u>b</u> le in:		_
Activity 7-2A (Document) 🗸 🗸			\sim
Close <u>F</u> ile		Op <u>e</u> n File	e
Description			1/2
Style: Hide until used, Priority: 2			
		Clos	se
			-

9. Navigate to your Exercise Files folder. Locate and select Activity 7-2B. Click Open:

🕎 Open								×
← → • ↑ <mark> </mark>	« Desk	top > MOS5011_Word_2016_2_ExerciseFiles	 Starting Files for Activi 	ities > Lesson 7	v 0	Search Lesson 7		9
Organize 🔻 New	folder					Bee 👻		?
🖈 Quick access		Name	Date modified	Туре	Size			
E. Desktop	A	Activity 7-2B	9/23/2015 12:45 PM	Microsoft Word T	12 KB	1		
🕹 Downloads	*							
Documents	*							
Pictures	*							
👌 Music								
Videos								
🚺 Microsoft Word								
🐔 OneDrive								
💻 This PC								
💣 Network								
•4 Homegroup								
1	File nam	e: Activity 7-2B			~	All Word Templates		\sim
					Tools 🔻	Open	Cancel	

10. Let's update the heading styles in this document. Hold the Ctrl key and click Heading 1, Heading 2, and Heading 3 in the list on the right-hand side to select all three entries from the Activity 7-2B file:

Organizer			?	×
Styles Macro Project Items				
To Activity 7-2A:		In Activity 7-28:		
Defauit Paragraph Font Heading 1 Heading 2 Heading 3 No List Normal Table Nermel	 ∧ <- <u>C</u>opy <u>D</u>elete Rename 	Company Name Default Paragraph Font Heading 1 Heading 2 Heading 3 No List		^
Title	~	Table Normal		\sim
Styles a <u>v</u> ailable in:		Styles availa <u>b</u> le in:		
Activity 7-2A (Document)	\sim	Activity 7-2B (Template)		\sim
Close	e <u>F</u> ile		Clos <u>e</u> F	ile
Description				
			Clo	ose

11. Click Copy to transfer them to the Activity 7-2A file:

Organizer		? ×
Styles Macro Project Items		
To Activity 7-2A:	In Activity 7-2B:	
Default Paragraph Font A Heading 1 Heading 2 Heading 3	Company Name Default Paragraph For Delete Delete	nt
No List Normal Table Normal Title	Rename No List Normal Table Normal	~
Styles a <u>v</u> ailable in:	Styles available in:	
Activity 7-2A (Document)	Activity 7-2B (Template)
Close <u>F</u> ile		Clos <u>e</u> File
Description		
		Close

12. When prompted to confirm the operation, click "Yes to All:"



13. The styles will now be copied. Now, let's copy a unique style. Click to select the Company Name style from Activity 7-2B and click Copy:

Organizer				?	×
Styles Macro Project items To Activity 7-2A: Default Paragraph Font Heading 1 Heading 2	^	<- <u>C</u> opy	In Activity 7-28: Company Name Default Paragraph Font Heading 1		^
No List Normai Table Normal Title Styles agailable in:	~	<u>R</u> ename	Heading 2 Heading 3 No List Normal Table Normal Styles availa <u>b</u> le in:		~
Activity 7-2A (Document)	Close <u>F</u> ile		Activity 7-2B (lemplate)	Clos <u>e</u> F	ile
Font: +Headings (Calibri Light), 26 pt, 1 in the Styles gallery Based on: Normal	Dot-dash underlin	ne, Font color: W	hite, Outline, Text Outline, Shadow, Style	:: Linked, Sh	ow
				Clo	se

14. The operation will complete without requiring confirmation since that style did not exist in the original document. Close the Organizer:

Organizer				?	Х
Styles Macro Project Items					
To Activity 7-2A: Company Name Default Paragraph Font Heading 1 Heading 2 No List Normal Table Normal	~	<- <u>C</u> opy <u>D</u> elete <u>R</u> ename	In Activity 7-28: Company Name Default Paragraph Font Heading 1 Heading 2 Heading 3 No List Normal Table Normal		< >
Styles a <u>v</u> ailable in:			Styles availa <u>b</u> le in:		
Activity 7-2A (Document)	\sim		Activity 7-2B (Template)		\sim
	Close <u>F</u> ile			Clos <u>e</u> F	ile
Description Font: +Headings (Calibri Light), 26 pt, in the Styles gallery Based on: Normal	, Dot-dash underlin	ne, Font color: W	'hite, Outline, Text Outline, Shadow, Style:	Linked, Sh	ow
				Clo	se

15. Check out the changes to the document:



The three heading styles that we copied from the template have been updated, but the Title style has not been affected.

16. Now let's save this file as a template for future use. Click File \rightarrow Save As \rightarrow Browse:



17. The Save As dialog will open. Change the file name to Activity 7-2 Complete. Choose Word Template as the file type and accept the default file location. Finally, click Save:

💽 Save As					×
← → → ↑ 📙 « Local Disk (C:) → U	lsers > Acme Widgets > Documents > Cu	stom Office Templates	~ Ö	Search Custom Of	fice Templa 🔎
Organize 🔻 New folder					III - 🕐
✓ Quick access Name ■ Desktop # ▲ Downloads # ☑ Documents # ☑ Pictures # ▲ Wideos # ☑ Microsoft Word @ ④ OneDrive # ☑ This PC # ☑ Network #	A Date modif	ed Type tems match your search.	Size		
• Homegroup					
File name: Activity 7-2 Complete					~
Save as type: Word Template					~
Authors: Acme Widgets	Tags: Add a tag	Title: Add a	title		
Save Thumbnail					
Hide Folders			Tools 🔻	Save	Cancel

18. Let's make sure that our new template works. Click File \rightarrow New:



19. In the New category of Backstage view, click the Personal link:

¢			Activity 7-2 Complet	te - Word		7 -	□ × Sign in
info	New						
New							
Open	Search for online templates		م				
Save	Suggested searches: Business Perso	onal Industry Print Design Sets	Education Event				
Save As	FEATURED PERSONAL						
Print	10						
Share		(→	-		Aa	Title 🖸	
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Options	Blank document	Welcome to Word +	Cover letter (blue)	Football pool scorecard	Single spaced (blank)	Blog post	
Ferdback		TITLE HEADING	Title 1 HEADHG	Figure 1	A CONTRACTOR OF A CONTRACTOR O		
	Banded design (blank)	Spec design (blank)	Report design (blank)	Student report with cov	APA style report (6th edi	Academic calendar (on	
	Weddy antigeneet cale.	Incomplex calendar	renteries Transmission Trans	Cover letter (blue)	Provide the second seco	Frend Control of Contr	

20. You should see your template. Double-click it to create a new document from it:



21. The new document will open:

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		*
	Title	
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Pase 1 of 1 7 words D2 11		v 15 + 1095

22. Close Microsoft Word 2016 without saving the new document to complete this activity.

Summary

In this lesson, you learned all about templates. Topics included creating, managing, modifying, and using template files. You should now feel comfortable using templates in your daily workflow.

REVIEW QUESTIONS

- 1. When updating styles, what is the difference between attaching a template and using the Organizer?
- 2. What tab provides commands to manage templates?
- 3. What is the default template location?
- 4. What is the first step to creating a template?
- 5. True or False: Document wizards have been removed from Microsoft Word 2016.

LESSON 8: USING MAIL MERGE

Lesson Objectives

In this lesson you will learn:

About the mail merge features, including manual mail merge tools and the Mail

Merge Wizard

- How to use mail merge to create envelopes and labels
- How to create a data source using Microsoft Word

TOPIC A: The Mail Merge Features

When used properly, mail merge is one of the best time-saving tools in Word. However, it offers many complex options and can be confusing for new users. In this topic, we will take an in-depth look at the mail merge features and how to access them in Microsoft Word.

Topic Objectives

In this topic, you will learn:

- What mail merge is and the steps that it involves
- About key elements of a mail merge, including fields, rules, and data sources
- About the commands on the Mailings tab
- How to use the Mail Merge Wizard and its related dialog boxes
- How to open a document with a data source attached
- How to unlink a data source from a mail merge document

MAIL MERGE

Mail merge is the process of combining a document (such as an e-mail message, a letter, or a label) and a data source (such as a list of addresses). The finished document is customized to each entry in the data source.

For example, let's say you want to send a quarterly newsletter summing up the events of the year to shareholders in your company. You can use mail merge to create the letter and then merge it with your address list so that each letter is addressed to the recipient.

MAIL MERGE FIELDS

Fields are the places where Word will insert your data into the mail merge document. These fields can be added in Step 4 of the Mail Merge Wizard or manually using the Mailings tab:

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Envelopes Labels	Lart Mail Select Edit Highlight Address Greeing Intert Merge Rules * Previow Rules * Finish & Lart Mail Select Edit Herge Fields Block Line Field Dupdate Labels Previow Rules * Finish & Start Mail Herge Fields Block Line Field * Dupdate Labels Previow Rules * Finish &				orgin in	74 ond	~
	ACME WIDGETS INC. By3 ROMINES MILL ROAD, PLANO, TX 75074 Sf//2020 Andrew Gordon Acme Widgets Inc. By3 RomMes Mill Road, Plano, TX 75074 eAddressBlocko eGreetingLine- want to reach out to you personally to thank you for joining the Acme Widgets family. Our team is here to help you whenever and wherever you need it. Just refer to the information sheet that came packaged with your widget for your personalized help options. As a thank-you, I'd like to offer you 15% off of your next purchase! Just use the promo code LOVEWIDGETS. If you use this code in the next two weeks, I'll throw in free shipping too. Sincerely,			Mail M Write your If you have to be added to be added to be added of the second second second second of the second	letter letter letter lipient inf inf inf inf inf inf eeting lini tertonic p ore items. inf inf inf eeting lini tertonic p ore items. inf inf inf inf inf inf inf inf inf eeting lini tertonic p ore items. inf	ady donne now. Jocation Jocation Jocation Jocation Stabelow. Ck e Ostage Shed Uick Next wand tipient's	×
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Page 1 of 1 115 we	rds 🕼 🛅	3	F6 -	-	4	+ 129	P%

You can easily identify fields by the chevrons that appear around them:

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«AddressBlock» «GreetingLine»	
want to reach out to you personally to thank you for joining the Acme W help you whenever and wherever you need it. Just refer to the informatio your widget for your personalized help options.	Widgets family. Our team is here to on sheet that came packaged with
As a thank-you, I'd like to offer you 15% off of your next purchase! Just us you use this code in the next two weeks, I'll throw in free shipping too.	e the promo code LOVEWIDGETS. If
Sincerely,	
Andrew Gordon	

Let's look at the four categories of merge fields shown in the Mail Merge Wizard above.

Address Block

This merge field marks where each person's address will go. It can be customized to display whatever elements you like:

Insert Address Block		?	\times
Specify address elements ✓ Insert recipient's name in this format: Joshua Joshua Randall Jr. Josh Randall Jr. Mr. Joshua Randall Jr. Mr. Joshu	Preview Here is a preview from your recipient list: Here is a preview from your recipient list: Correct Problems If items in your address block are missing or out or Match Fields to identify the correct address element your mailing list. Mat	f order, i nts from ch Field:	use
	ОК	Cano	el

Greeting Line

This merge field allows you to customize how each recipient is addressed:

Insert Greeting Line	?	\times
Greeting line format:		
Dear 🗸 Mr. Randall 🗸 , 🗸	•	
Greeting line for invalid recipient names:		
Dear Sir or Madam, 🗸		
Preview		
Here is a preview from your recipient list:		
Dear Sir or Madam,		
Correct Problems		
If items in your greeting line are missing or out of order, use Ma to identify the correct address elements from your mailing list.	atch Field	ds
Mat	ch Fields	5
ОК	Cano	el

More Items

To see a full list of fields that you can insert, click Mailings \rightarrow Insert Merge Field or click the "More items" link in Step 4 of the Mail Merge Wizard.

Electronic Postage

If you have electronic postage software installed, you can include it on envelopes using the appropriate link in Step 4 of the Mail Merge Wizard.

MAIL MERGE RULES

Rules are similar to fields in a mail merge in that they insert variable information into your document. The difference is that they operate on conditions rather than using all the information available.

To create a rule, click Mailings \rightarrow Rules and choose the type of rule that you want to create:



Let's look at each option.

- Ask: If you have created bookmarks, insert this field at the beginning of your document. Then, Word will ask you what text you want to put in and place that text at each bookmark as it merges each record. (Text can be different for each record.)
- **Fill-in:** When you complete the merge, Word will ask you what text you want to place in this field as it merges each record.
- If...Then...Else...: If a field equals a certain value, Word will insert a certain text string. Else, Word will insert a different text string.
- Merge Record #: Will add a number to each merge result.
- Merge Sequence #: Counts the number of successfully merged records.
- Next Record: Inserts the next record into the current document.
- Next Record If: Inserts next record into the current document if certain conditions are met.
- Set Bookmark: Sets a bookmark at a specified location.
- Skip Record If: Skips the record if certain conditions are met.

DATA SOURCES

The **data source** is the file that contains the information that will be used during the merge, such as a list of addresses. You can use any of the following items as data sources:

Microsoft Access databases

- Microsoft Excel spreadsheets
- Tables in Microsoft Word documents
- Contacts from Microsoft Outlook

You can also create the data source during the mail merge using Microsoft Word.

THE MAIL MERGE PROCESS

The mail merge process has five main steps:

- 1. Create the mail merge document.
- 2. Connect the data source to the document.
- 3. Select the recipients for the mail merge from the data source.
- 4. Add merge fields.
- 5. Preview and complete the merge.

You can use the Mail Merge Wizard to guide you through these steps or you can perform them manually.

THE MAILINGS TAB

The Mailings tab is where you will find all the commands that you need when performing a mail merge:

H	ب ج	، ک	:							Mail Merg	e Letter - W	/ord	
File	Home	Inser	t Desigr	1 Layout	References	Mail	ings	Review	View	♀ Tell me	what you v		
Envelopes	Labels	Start Mail Merge •	Select Recipients	Edit Recipient List	Highlight Merge Fields	Address Block	Greeting	g Insert Merg Field +	[? R ₽ ₽ № ₽ [∂ U	ules * latch Fields pdate Labels	۲ Preview Results	Image: Check for Errors	Finish & Merge •
Crea	ate		Start Mail N	lerge			Write &	Insert Fields				Preview Results	Finish

Let's go over its groups.

- **Create group:** Create envelopes and labels.
- Start Mail Merge group: Start the mail merge and manage the recipients list.
- Write & Insert Fields group: Add merge fields to the document and create rules.
- **Preview Results group:** Preview how the merge will look when finished.
- Finish group: Complete the merge.

THE MAIL MERGE WIZARD AND RELATED DIALOG BOXES

Now that we are familiar with all the elements of a mail merge, let's learn how to perform the process using the Mail Merge Wizard.

To start, click Mailings \rightarrow Start Mail Merge \rightarrow Step-by-Step Mail Merge Wizard:

B	ب ب	, گ								Mail Merge	e Letter - W	/ord	
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Envelope	s Labels	Start Mail	Select Recipients - F	Edit Recipient List	Highligh Merge Fiel	Address	Greeting	g Insert Merge Field •	e 🖓 Rul Mai	es ▼ tch Fields date Labels	Results	Find Recipient	rs
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		Norn	nal Word Doc	ument									
		🔊 Step-	by-Step Mail	Merge <u>W</u> izard	i 🕞								

The Mail Merge Wizard will open as a task pane on the right-hand side of your screen. Your first step is to **choose a document type**. When you're ready, click Next:

Hand Merge Letter - Word	
Table Norme Version Version	sign in 54, share
ACME WIDGETS INC.	Mail Merge * × Select document type What type of document are providenting with type of document are providenting with type of ty
873 ROMINES MILL ROAD, PLANO, TX 75074	 Directory
5/1/2020	Letters Send letters to a group of people. You can personalize the letter that each person receives. Click Next to continue.
Arme Widgets Inc. Arme Widgets Inc. 873 Romines Mill Road, Plano, TX 75074	
«GreetingLine»	
I want to reach out to you personally to thank you for joining the Acme Widgets family. Our team is here to help you whenever and wherever you need it. Just refer to the information sheet that came packaged with your widget for your personalized help options.	
As a thank-you, I'd like to offer you 15% off of your next purchase! Just use the promo code LOVEWIDGETS. If you use this code in the next two weeks, I'll throw in free shipping too.	
Sincerely,	
	Step 1 of 6
Andrew Gordon	→ Next: Starting document
CEO	Next wizard st
Page of 1 115 words 🛛 🕼 🛅	目 国 - + 129%

For this example, we'll stick with letters. The remaining steps may differ slightly depending on the type of document you're creating, but the basic concept remains the same.

Once you click Next, you will be able to **choose what document you want to use** for the mail merge:



In this case, we've already created a letter, so we'll choose the current document. (Note that you can also use a template or an existing document, meaning a document that you've created but isn't open.) Once you've chosen the document, click Next.

The third step of the Mail Merge Wizard prompts you to **choose the recipients** of the merge. Depending on the option you select, the commands in the bottom part of the task pane will be different. The options for using an existing list are shown in this example:



Since we are using an existing list, we will click the Browse button and navigate to the folder that contains the source file. Word 2016 is capable of accepting and reading data from numerous sources:

rganize Vew folder Vew Source Vew Data Source Vision Vision Source Vision Vision Source Vision Source Vision Vision Source Vision Vision Source Vision Vision Source Vision Vision Vision Source Vision Vision Source Vision Vision Vision Source Vision Visio	⇒ ∨ ∧ छिरा	his PC > Documents > My Data Sources			× 71	Search My Data Sc	ources	Q
Quick access Name Date modified Type Size Desktop Image: Connect to New Data Source 7/3/2015 9:09 AM Microsoft Office D 1 KB Downloads Image: Connect to New Customers 7/3/2015 9:09 AM Microsoft Office D 1 KB Documents Image: Connect to New Customers 9/23/2015 1:12 PM Microsoft Excel W 16 KB Pictures Image: Connect to New Customers 9/23/2015 1:12 PM Microsoft Excel W 16 KB Microsoft Word Image: Connect to New Customers Notework Network Homegroup	rganize 🔻 New fold	er			. 0		E 🕶 🔟	?
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Downloads Pretvorg New Customers 9/23/2015 1:12 PM Microsoft Excel W 16 KB Videos Microsoft Word OneDrive This PC Network Homegroup	📃 Desktop 🛛 🖈	+ Connect to New Data Source	7/3/2015 9:09 AM	Microsoft Office D	1	KB		
Documents * Total Preferences * Total Pref	👆 Downloads 🛛 🖈	+NewSQLServerConnection	7/3/2015 9:09 AM	Microsoft Office D	16	KB		
	➢ Pictures							

Depending on the data source type, you may also be prompted to select a particular range of the file. Once this step is complete, you will be see the Mail Merge Recipients dialog box:

Use the checkboxes to add or remove recipients from the merge. When your list is ready, click OK.							
Data Source	\checkmark	Last Name			City	•	
New Customers.xl	☑	Bollinger	Emily	1334 Sycamore Fork Ro.	Fort Lauderdale	2	
New Customers.xl	\checkmark	Petre	Alexander	4132 Duff Avenue	Brattleboro		
New Customers.xl	\checkmark	Chien	Xue	609 Burnside Court	Tempe		
New Customers.xl	\checkmark	Logan	Donald	321 Colony Street	North Haven		
New Customers.xl	\checkmark	Scott	Barbara	1917 Collins Street	Punxsutawney		
New Customers.xl	\checkmark	Aiken	Guadalupe	2426 Lighthouse Drive	Branson		
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Data Source		Refine r	ecipient list				
New Customers.xlsx		∧ Â↓ so	<u>rt</u>				
		EI	ter				
		🔀 Ei	nd duplicates				
Find recipient							
Edit Refresh							

Simply check a record to include it or uncheck a record to exclude it from the merge.

After you click OK, the Mail Merge Recipients dialog will close. Click Next in the task pane to proceed to the next step:



Now you can write your document and insert the merge fields. Let's add the "Address block" merge field:

🔿 🔹 Mail Merge Letter - Word		• – • ×
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Start Mail Select Cool Market Product Labels Cool Market Product C		
	^	Mail Merge
		Weite www.letter
		If you have not already done so write your letter now.
		To add recipient information
		in the document, and then click one of the items below.
ACME WIDGETS INC.		Address block
873 ROMINES MILL ROAD, PLANO, TX 75074		Greeting IS.2
		Electronic postage More items
5/1/2020		When you have finished
<i>J</i> /1====		Then you can preview and personalize each recipient's
Andrew Gordon		letter.
Acme Widgets Inc.		
873 Komines Mill Road, Plano, 1X 75074		
«GreetingLine»		
I want to reach out to you personally to thank you for joining the Arme Widgets family. Our team is here to		
help you whenever and wherever you need it. Just refer to the information sheet that came packaged with		
your widget for your personalized help options.		
As a thank you, I'd like to offer you 15% off of your payt purchased, just use the promo code LOVEWIDGETS. If		
you use this code in the next two weeks. I'll throw in free shipping too.		
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anicerenty.		
		Step 4 of 6
Andrew Gordon		→ Next: Preview your letters
CEO		 Previous: Select recipients
ords UB 82	# E 5	- + 129%

When you click this link, you will be prompted to format the address block as desired, based on the information available in your data source:

Insert Address Block	?	×
Specify address elements ✓ Insert recipient's name in this format: Joshua Joshua Randall Jr. Mr. Josh Randall Jr. Mr. Josh Q. Randall Jr. Mr. Joshua Randall Jr. ✓ Insert company name	Preview Here is a preview from your recipient list: 1 D D Emily Bollinger 1334 Sycamore Fork Road Fort Lauderdale, FL 33309	
 ✓ Insert postal address: Never include the country/region in the address Always include the country/region in the address Only include the country/region if different than: United States ✓ Format address according to the <u>d</u>estination country/region 	Correct Problems If items in your address block are missing or out of order, Match Fields to identify the correct address elements from your mailing list.	, use n ds
	OK Car	ncel

The Address Block field will then appear in your document with chevrons around its position. This field will be customized for each recipient when you perform the merge:



can use the arrow buttons in the task pane to scroll through the recipients:

your widget for your personalized help options. Once your fields are in place, click Next. This step will show you a **preview** of your document. You

E 5-	う マ Mail Merge Letter - Word				-		x
File Home	Insert Design Lavout References Mailings Review View 🗘 Tell me what you want to do				ian in	Q. Shar	e
Envelopes Labels Create	Sate Mail Select Edit Edit Edit Edit Edit Edit Edit Edit Finds Address Greeting Inset Merge Sate Mail Recipients Recipients Recipients Edit Edit Finds Address Greeting Inset Merge Edit Provide Recipients Finds Address Sate Mail Merge Merge Fields Biost Line Fields Edit Provide Recipients Finds Address Sate Mail Merge Works Edits Enter Fields Provide Recults Provide Recults Finds Address						^
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Page 1 of 1 126 w	Andrew Cordon	8	-			+ 129	ž%

If you need to make any changes to the recipients, click the "Edit recipient list" link in the Mail Merge Wizard. You can also click the Previous link in the task pane to go back to any step and make changes. When you are satisfied with the result, click Next to proceed to Step 6.

In the final step, the merge will actually be performed. The options under the Merge heading will vary depending on the document type that you're creating. In this case, we can **edit** the individual letters or we can choose to **print** them:



Click OK to confirm the operation:

Merge to Ne	Document	?	×
Merge record	ecord		
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	ок	Cano	el 👘

The merge will always be performed to a new document so that you can still make changes to the original letter and re-merge them.

Here is our finished file:

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A Cut Candara (Body Paste	105 · Å Å Å Aa · Aabbccb AaBbcbcb AaBbccbc	aBbCc eading 2		Find * Replace Select * diting	^
					Ê
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Er 13 Fo	mily Bollinger 134 Sycamore Fork Road ort Lauderdale, FL 33309				
D	ear Emily ,				
L v he yc	want to reach out to you personally to thank you for joining the Acme Widgets family. Our team is here to elp you whenever and wherever you need it. Just refer to the Information sheet that came packaged with our widget for your personalized help options.				
As	s a thank-you, I'd like to offer you 15% off of your next purchase! Just use the promo code LOVEWIDGETS. If ou use this code in the next two weeks, I'll throw in free shipping too.				
Si	incerely,				
Δ1	ndraw Cordon				
Page 1 of 8 991 words 🛛 🕺 🛅		10	-		+ 129%

OPENING A MAIL MERGE DOCUMENT WITH A DATA SOURCE ATTACHED

When you open a mail merge document that has a data source attached, you will see a security warning like the following:



Click Yes to open the document and give the database access to it. If you open a document and you are not sure why you are seeing this notice, click No as the file may contain malicious data. You can also click Show Help to view more information about this warning.

UNLINKING A DATA SOURCE

To remove a data source from a mail merge file, click Mailings \rightarrow Start Mail Merge \rightarrow Normal Word Document:



The document will now be returned to a normal file and the data source will be unlinked.
ACTIVITY 8-1 Performing a Mail Merge

In this exercise you will perform a mail merge from start to finish.

1. To begin, open Microsoft Word 2016 and open Activity 8-1:



2. Click Mailings \rightarrow Start Mail Merge \rightarrow Step-by-Step Mail Merge Wizard:



3. The Mail Merge pane will appear on the right-hand side of the Microsoft Word window. Click the Letters radio button and then click Next at the bottom of the pane:

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File Home Insert Design Layout Reference	Mailings Review View Q Tell me what you want to do	Sign in 👂 Share
Envelopes Labes Create	Address Greeting Insert Marge To Update Labels S Block Line Fields - D Update Labels Write & Nurer Heids	A
<i>8/1/2020</i>	Acrose Wridgets Inc. BY ROWNES MILL ROAD, PLANO, TX 2007 Address Here Hele Was preased to inform you that you have automatically been enrolled for SX FREE MONTHS of our betta program Look for our delivery truck bridget or newest widget to you in the next few weeks. Thenk you for being a customert	Maintered Section Section
		Next: Starting opcument Next wizard ste
Page 1 of 1 63 words []B 🛗		BB 📰 😼 - 📕 + 105%

4. In Step 2, ensure that the "Use the current document" radio button is selected. Then, click Next:



5. In Step 3, ensure that the "Use an existing list" radio button is selected. Click Browse:



6. Browse to the Lesson 8 folder of your Exercise Files. Select the Customers spreadsheet and click Open:

🕎 Select Data Source									×
← → • ↑ <mark> </mark> •	Ø Deskto	p → MOS5011_Word_2	2016_2_ExerciseFiles >	Starting Files for Activi	ities → Lesson 8	~ Ö	Search Lesson 8		P
Organize 🔻 New	folder						8==	•	?
Quick access Desktop Downloads Documents Pictures Music Videos Videos Microsoft Word OneDrive This PC Network Homegroup	N 間 回	lame ▲		Date modified 9/23/2015 4:31 PM 9/23/2015 4:19 PM	Type Microsoft Word D Microsoft Excel W	Size 53 12	1 K3 K8		
		New Source					All Data Sauras		
F	ne name:	Customers				Tools 🔻	Open	Cancel	- - -

7. The Select Table dialog box will open. Click OK to use the selected sheet:

Select Table			7	· >	<
Name I Sheet1\$	Description	Modified 9/23/2015 4:19:24 PM	Created 9/23/2015 4:19:24 PM	Type TABLE	
<					>
First row of data	contains colu	mn headers	ок	Cancel	

8. The Mail Merge Recipients dialog will open and show the data contained within the spreadsheet. Make sure that all of the records are checked and click OK:

Data Source	~	Last Name		Street Address	City
Customers.xlsx		Aiken	Guadalupe	2426 Lighthouse Drive	Branson
Customers.xlsx	~	Chien	Xue	609 Burnside Court	Tempe
Customers.xlsx	v	Cunningham	Marilyn	3771 Friendship Lane	Sunnyvale
Customers.xlsx	~	Frueg	Lucas	2066 Francis Mine	Redding
Customers.xlsx	~	Goodman	Aaron	2248 Neuport Lane	Norcross
Customers.xlsx	v	Hall	Sharon	4974 Bridge Street	Tulsa
Customers.xlsx	v	Petre	Alexander	4132 Duff Avenue	Brattleboro
Customers.xlsx	~	Scott	Barbara	1917 Collins Street	Punxsutawney
<					
Data Source		Refine re	cipient list		
Customers.xlsx		∧ Â↓ <u>so</u>	<u>rt</u>		
		T Fil	ter		
		Eir Fir	nd duplicates		
			d cosisiont		
			id recipient		
		Va	lidate addresses		

9. Click Next in the Mail Merge task pane to advance to the next step:

🖬 5·0 🔹		œ – □ ×
File Home Insert Design Layout References	Mailings Review View Q Tell me what you want to do	Sign in 🔉 Share
Envelopes Labels Create	Image: Constraint of the set of the se	^
8/1/2020	Acme Widgets Inc. 873 ROMINES MILL ROAD, PLANO, TX 73074	Mail Merge * X Select recipients * Use an entring its grave raise its Use are entring its grave are wits Use are entring its Currently, your projects are satisfied from Diverting in "Contineers.its" Select are from the
	Address Here	Edit recipient list
	Hello	
	We are pleased to inform you that you have automatically been enrolled for SIX FREE MONTHS of our betta program Look for our delivery truck bringing our newest widget to you in the next few weeks.	
	Thank you for being a customer!	
	Tany Romos Beite Program Director Acme Widgets	
1		
Juni di Janete (d. 19		Step 3 of 6 → Net: Write your letter ← Pressus Starting © Diment Net wisherd Ste
Page 1 of 1 63 words		BR 📰 🛯 - + 105%

10. Select the "Address Here" text and delete it. Your cursor should be in the position shown below:

+	
	Acme Widgets Inc. 873 ROMINES MILL ROAD, PLANO, TX 75074
8/1/2020	
\longrightarrow	.
	Hello
	We are pleased to inform you that you have automatically been enrolled for SIX FREE MONTHS of our beta program! Look for our delivery truck bringing our newest widget to you in the next few weeks.
	Thank you for being a customer!
	Tony Ramos Beta Program Director Acme Widgets

11. Click the "Address block" link in the Mail Merge Wizard:



12. When the Insert Address Block dialog appears, choose the second salutation from the first list on the left-hand side. Click OK to continue:

Insert Address Block	? ×
Specify address elements Insert recipient's name in this format: Josh Iosh Randall Jr. Joshua Joshua Joshua Joshua Randall Jr. Joshua Randall Jr. Voshua Randall Jr. Voshua Randall Jr. Voshua	Preview Here is a preview from your recipient list: 1 ↓ ↓ Guadalupe Aiken 2426 Lighthouse Drive Branson, FL 35616
 ✓ Insert postal <u>a</u>ddress: ○ <u>N</u>ever include the country/region in the address ○ <u>Always</u> include the country/region in the address ● <u>O</u>nly include the country/region if different than: United States ✓ Format address according to the <u>d</u>estination country/region 	Correct Problems If items in your address block are missing or out of order, use Match Fields to identify the correct address elements from your mailing list.
	OK

13. The field will now be inserted:

+		Acme Widgets Inc. 873 ROMINES MILL ROAD, PLANO, TX 75074
	8/1/2020	
		«AddressBlock» Hello We are pleased to inform you that you have automatically been enrolled for SIX FREE MONTHS of our beta program! Look for our delivery truck bringing our newest widget to you in the next few weeks.
		Thank you for being a customer! Tony Ramos

Tony Ramos Beta Program Director Acme Widgets **14.** Delete the "Hello" text, leaving your cursor on that line. Click Mailings \rightarrow Greeting Line:

E 5.														
File Home		Design		References	Mailings	Review View	Design	Layout						A Share
Envelopes Labels Create	Start Mail Merge • F	Select Recipients + F Rart Mail Mer	Edit Recipient List ge	Highlight Merge Fields	Address Greeting Block Line C	Insert Merge	tules + Aatch Fields Ipdate Labels	Preview Results	Find Recipient Check for Errors Preview Results	Finish & Merge * Finish				^
		æ	8/1/:	2020	Acme Wid 873 ROMINE 75074	igets Inc. ES MILL ROAD, I	PLANO, TX					Mail M Write your I If you have write your To add red your letter, the docum one of the Ad G G f E E	erge Jetter inot alread letter now. pient infor click a loci ent, and th items belo dress block eeting line. ectronic po:	y done so, trmation to ation in ten dick iw.
					«AddressBlov We are plea for SIX FREE bringing our	do) ased to inform y MONTHS of ou newest widget :	ou that you r beta prog to you in the	have aut raml Looi next fev	omatically been enrolls for our delivery truck r weeks.	ed		When you your letter, can previe each recipi	re items have finish click Next. wand pers- ient's letter	sed writing Then you onalize f
					Thank you fo	or being a custor	nerl							
					Tony Ramos Beta Prograr Acme Widge	s m Director ets								
Page 1 of 1 61 w	ords DB	81									14 MI	Step 4 of 6 → Next: F ← Previou	Preview you us: Select ri	ar letters ecipients

15. The Insert Greeting Line dialog box will open. Click the middle menu in the top row and choose "Joshua:"

Insert Greeting Li	7	?	×						
<u>G</u> reeting line form Dear v	aat: Joshua Randall Jr.	~	,	\sim					
Gr <u>e</u> eting line for i Dear Sir or Ma Preview	Joshua Randall Jr. Josh Randall Jr. Joshua and Cynthia Randall Josh and Cynthia Randall	^							
Here is a preview i	Joshua Josh Joshua and Cynthia Josh and Cynthia	~							
Dear Guadal	upe Aiken,								
Correct Problems If items in your greeting line are missing or out of order, use Match Fields to identify the correct address elements from your mailing list.									
			!	<u>M</u> atch	Fields	i			
			OK		Canc	el			

16. Click OK:

Insert Greeting Line	?	×					
Greeting line format: Dear V Joshua V , Gr <u>e</u> eting line for invalid recipient names:	/						
Dear Sir or Madam, V Preview							
Here is a preview from your recipient list:							
Dear Guadalupe,							
Correct Problems If items in your greeting line are missing or out of order, use Match Fields to identify the correct address elements from your mailing list. <u>Match Fields</u>							
ОК	Can	cel					

17. The field will now be inserted. Click Next to advance in the Mail Merge Wizard:



18. Now, a preview of your letter will be shown. Make sure that everything is correct. (If you need to change anything, click the Previous link at the bottom of the task pane.) When you are satisfied, click Next:

🗄 🔊 ্	•	_	Activity 8	1 - Word	_		Table	Tools					-		×
File Home	Insert Design		References	Mailings			Design	Layout						∕₽, Sh	hare
Ervelopes Labels Sta Create	rt Mail Select erge * Recipients * F Start Mail Mer	Edit Recipient List	Highlight Merge Fields	Address Greetin Block Line Write 8	ig Insert Merg Field +	ge 🕃 Upi	les * itch Fields date Labels	Preview Results	Image: Check for Errors Preview Results	Finish & Merge - Finish					^
Create	Recipitets * 8 Start Mail Mer	€/1//	Mrga Fidds	Bick Line work & Wor	Field- dgets Inc. #ES MILL RC #Akon hourse Drive added to inf #Akon hourse Drive #Akon hourse Drive #Akon #Akon hourse Drive #Akon # #Akon # #Akon # #Akon # #Akon # #Akon # # # # # # # # # # # # # # # # # # #	Co Upin	date Labels	have out	omotically been enroll	ed a		Mail N Protecting of the second secon	lenge werketter e nerged Recpeied Recpeied ges Bochange due this re have the have th	s leften is previous one of the 1 the the the the the the the the	The International Internationa
Page 1 of 1 70 words	Cp8 111										88	→ <u>Next.</u> ← Previa	Complete ous: Write	your lette	5

19. Click "Edit individual letters" in the Mail Merge Wizard:



20. You will be prompted to select what records to merge. Leave the All radio button selected and click OK:

Merge to Ne	w Document	?	×
Merge record All Curr <u>e</u> nt	record		
O <u>F</u> rom:	<u>T</u> o:		
	ок 🖓	C	ancel

21. This will create a new document with a letter for each person on each page:

		٠						Le	tters1 - Word							æ	-		×
File	Home	Insert	Design	Layout	References	Mailings	Review View	/ Q Telli	me what you w	ant to do							Sign in	,Ą, s	hare
Paste	Cut Copy Format Pair Clipboard	nter G	w Cen MT (i B <i>I</i> <u>⊔</u> ≁	8 * 11.5 * A alse x, x ² Font	(∧ Aa -	♦ E • E A • E = E	= 17: + €≣ ♥ ≡ ≡ \$≡ + & Paragraph	2↓ ¶ ≧•⊡• s	Ao8bCcDdl 1 Footer O	AnBhCcDd 1 Header	AaBbCcDe 1 Normal	AaBbCcDr 1 No Spac Styles	AaBbCc 1 Compan	AaBbCcDi 1 Sender	AaBbCcD+ Recipient		ind + leplace ielect + liting		~
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Page 1	of 8 560 word	ts DB	11 1											BB				+	75%

22. Save the documents as Activity 8-1A Complete and Activity 8-1B Complete, and then close Word to complete this activity.

TOPIC B: Merge Envelopes and Labels

While the ability to create custom letters is great, you may also need to mail them out. Luckily, Word is also able to create individualized envelopes and mailing labels. During this lesson, we will learn how to merge address information and print envelopes or labels just as we did with letters.

Topic Objectives

In this topic, you will learn:

- About merge options for envelopes and labels
- How to create a single envelope or label
- How to set up your return address

MERGE OPTIONS FOR ENVELOPES AND LABELS

You can perform a mail merge for envelopes or labels by choosing that option from the Start Mail Merge menu on the Mailings tab or in the first step of the Mail Merge Wizard:

	<u>ج</u> - ا	ب 10							Docum	ent1 - Wor	d			œ	-		×
File	Home	Insert	Design	Layout	References	Mailings	Review	View	🛛 Tell me	what you	want to do				Sign in	Яs	hare
Envelopes Crea	Labels	Start Mail Merge *	Select Recipients *	Edit Recipient List	Highlight Merge Fields	Address Greetin Block Line Write &	ng Insert Me • Field & Insert Field	C? Ri Prge Cô Uj Is	ules ~ latch Fields pdate Labels	(Results	Find Recipient Check for Errors Preview Results	Finish & Merge - Finish					^
		E-m Enye Labe	ail Messages elopes els ctory											Mail Select d What t	Merge ocument 1 ype of docu orking on?	ype ment a	₩ ×
		Non	mal Word Doi -by-Step Mai	:ument I Merge <u>W</u> izan	d										Letters E-mail mess Envelopes Labels Directory	ages	
														Letters Send le people the lett receive Click N	etters to a g . You can p ter that eac s. ext to conti	roup or ersonal n perso nue.	ize n

With either choice, you will be prompted to choose how your labels or envelopes are set up. Here are the options for envelopes:

Envelope Options		?	×
Envelope Options	Printing Options		
Envelope <u>s</u> ize:			
Size 10	(4 1/8 x 9 1/2 in)	\sim	
Delivery address			
<u>F</u> ont	From left:	Auto	-
	From top:	Auto	-
Return address			
F <u>o</u> nt	Fro <u>m</u> left:	Auto	-
	F <u>r</u> om top:	Auto	-
Preview			
ſ	= •	1	
l]	
	OK		ncal
	UK		incer

And here are the options for labels:

Label Options	?	×
Printer information O Continuous-feed printers Image printers Image Irray: Default tray (Tray 1) Label information Label vendors: Microsoft		
Find updates on Office.com Label information 1/2 Letter ^ 1/2 Letter ^ 1/2 Letter ^ 1/4 Letter ^ 1/4 Letter ^ 1/4 Letter ^ 30 Per Page ~ 30 Per Page ~		
Details Delete OK	Car	ncel

CREATING A SINGLE ENVELOPE OR LABEL

To create just a single envelope or label, click the appropriate command on the Mailings tab:



With either command, you will see the Envelopes and Labels dialog box. If you choose to create an envelope, the Envelopes tab will be displayed. It contains text boxes where you can enter the delivery and return address, as well as some additional options:

Envelopes and Labels			? ×
Envelopes Labels			
<u>D</u> elivery address:		•	
			^
Add ele <u>c</u> tronic postage			*
<u>R</u> eturn address:	0 <u>m</u> it		
	Preview		Feed
		-	Ū.
	v		
Before printing, insert envelopes into t	he following printer	tray: Tray 1.	
Print Add to Document	Options	E-pos <u>t</u> age Pr	operties
			Cancel

Once your options are set, click "Add to Document:"

Envelopes and Labels	?	×
Envelopes Labels		
Delivery address:		
Alexander Petre 4132 Duff Avenue Brattleboro, VT 05301		^
Add ele <u>c</u> tronic postage Return address:		~
Preview	Feed	
]
Before printing, insert envelopes into the following printer tray: Tray 1.		
Print Add to Document Options E-postage	Propertie	5
× ×	Can	cel

When you click "Add to Document," your envelope will be created:



If you choose to create a label, you will see the Labels tab of the Envelopes and Labels dialog box. It contains options for configuring its size and the position of the various elements, as well as the address to include on it:

Envelopes and Labels	? ×
<u>E</u> nvelopes <u>L</u> abels	
<u>A</u> ddress:	📑 🔻 🗌 Use <u>r</u> eturn address
	^
	×
Print <u>F</u> ull page of the same label Single label Row: 1 + Column: 1 +	Label Microsoft, 1/2 Letter 1/2 Letter Postcard
Before printing, insert labels in your printer Print New Document	s manual feeder. Options E-pos <u>t</u> age Properties
	Cancel

When you are ready, you can add the label to a new document or send it right to the printer.

SET UP A RETURN ADDRESS

Both tabs of the Envelopes and Labels dialog offer the option to automatically insert your return address. To set this address, we will need to use the Word Options dialog box.

To open this dialog, click File \rightarrow Options:



Now, click the Advanced category. Scroll to the bottom of this category and you will see the appropriate field:

Word Options		?	×
General Display Proofing	Print PostScript over text Print only the data from a form Save		^
Save Language Advanced Customize Ribbon	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		
Quick Access Toolbar Add-Ins Trust Center	Preserve fidelity when sharing this document: Image: Document 1 image: Doc		I
	Provide feedback with animation 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: Eile Locations		~
	ОК	Can	cel

In this field, enter the desired return address and click OK to save it. It will automatically be populated in various Mail Merge dialog boxes. Or, you can insert it as document text by clicking Insert \rightarrow Quick Parts \rightarrow Document Property \rightarrow Company Address:



ACTIVITY 8-2 Merging Envelopes and Labels

In this activity, you will create envelopes for the letters that we created in the last activity.

- **1.** To begin, open Microsoft Word 2016 to a blank document.
- **2.** First, let's set up our return address. Click File \rightarrow Options:



3. Click the Advanced category of the Word Options dialog box:

Word Options		?	Х
General	General options for working with Word.		
Proofing	User Interface options		
Save Language Advanced Customize Ribbon Quick Access Toolbar Add-Ins Trust Center	Show Mini Toolbar on selection ① ✓ Enable Live Preview ① ✓ Update document content while gragging ① Screen Tip style: Show feature descriptions in ScreenTips ✓ Personalize your copy of Microsoft Office User name: Acrne Widgets Initials: AW △ Always use these values regardless of sign in to Office. Office Theme: Confut		
	Start up options		
	Choose the extensions you want Word to open by default: Default Programs Tell me if Microsoft Word isn't the default program for viewing and editing documents. Open e-mail attachments and other uneditable files in reading view Show the Start screen when this application starts		
	Real-time collaboration options		
	When working with others, I want to automatically share my changes: Ask Me v Show names on presence flags		
	OK	Ca	ncel

4. Scroll to the bottom of the options in this category and click to place your cursor in the "Mailing address" field:

Word Options		?	×
General Display	Print PostScript over text Print only the data from a form		^
Proofing	Save		
Save Language Advanced Customize Ribbon	Prompt before saving Normal template ① Always create backup copy Copy remotely stored files onto your computer, and update the remote file when saving Allow background saves		
Quick Access Toolbar	Preserve fidelity when sharing this document:		
Add-Ins Trust Center	□ Save form data as delimited text file ☑ Embed linguistic data		
	General		
	Provide feedback with gound Provide feedback with gnimation Confirm file format conversion on open Update automatic links at open Allow opening a document in Draft view Finable background repagination Show add-in user interface errors		
	Mailing address:	Ca	v ncel

5. Enter the address as shown below and click OK:

Word Options		?	×
General Display	Print PostScript over text Print only the data from a form		^
Proofing	Save		
Language	Prompt before saving Normal template 🛈		
Advanced	Always create <u>b</u> ackup copy		
Customize Pilshon	Copy remotely stored files onto your computer, and update the remote file when saving		
Quick Access Toolbar	Preserve fidelity when sharing this document: Document1		
Add-Ins	Save form data as delimited text file		
Trust Center	☑ Embed ling <u>u</u> istic data		
	General		
	Provide feedback with sound		
	Provide feedback with animation		
	Confirm file format conversion on open		
	Opuale automatic links at open Allow opening a document in Draft view		
	Finable background repagination		
	Show add-in user interface errors		
	Mailing a <u>d</u> dress: 873 Romines Mill Road Plano, TX 75074		
	Eile Locations Web Options		
		1	~
	ОК	Car	ncel

6. Now, let's do an envelope mail merge. Click Mailings → Start Mail Merge → Step-by-Step Mail Merge Wizard:



7. In the first step of the wizard, select Envelopes as the document type and click Next:



8. Choose to change the current document's layout and click Next:



9. The Envelope Options dialog box will open. Click OK to accept the default settings:

Envelope Options		? ×
Envelope Option	Printing Options	
Envelope <u>s</u> ize:		
Size 10	(4 1/8 x 9 1/2 in)	\sim
Delivery address		
<u>F</u> ont	From left:	Auto ≑
	From top:	Auto 🖨
Return address		
F <u>o</u> nt	From left:	Auto 🖨
	F <u>r</u> om top:	Auto ≑
Preview		
	=	
	OK	Cancel

10. The envelope will be created and your pre-set mailing address will be included. Now, let's add the recipients. In the third step of the Mail Merge Wizard, ensure that "Use an existing list" is selected. Click Browse:

🗄 🖘 - 🗇 👘		
File Home Insert Design	Layout References Mailings Review View Q Tell me what you want to do	Sign in 👂 Share
Envelopes Labels Create	Edit Hogh Fields Greeting Insert Marge Dr. Dublic Labor Fields Provide Concentration of the C	
B73 Romines Mill Road Plano, TX 75074		Mail Merge Kett recipient Charlen the Model canada Charlen the Model canada Charlen the Model canada Charlen the Model canada
		Step 3 of 6
		Previous: Starting document
Page 1 of 1 7 words		創 圖 局 - 4 + 117%

11. Browse to the Lesson 8 folder of your Exercise Files. Select the Customers spreadsheet and click Open:

関 Select Data Source									×
← → • ↑ 📙	< Deskto	p → MOS5011_Word_	_2016_2_ExerciseFiles >	Starting Files for Activi	ties → Lesson 8	~ Ö	Search Lesson 8		P
Organize 🔻 New	folder						833	-	?
 ✓ Quick access Desktop Downloads Documents Pictures Music Videos Videos Microsoft Word OneDrive This PC Network Homegroup 	1 7 7 7 7 7	lame ^	^	Date modified 9/23/2015 4:31 PM 9/23/2015 4:19 PM	Type Microsoft Word D Microsoft Excel W	Size 53 K 12 K	9 18		
	ile name	New Source					All Data Sources		×
	ne name	Customers				Tools 💌	Open	Cancel	

12. The Select Table dialog box will open. Click OK to use the selected sheet:

Select Table			7	· >	<
Name I Sheet1\$	Description	Modified 9/23/2015 4:19:24 PM	Created 9/23/2015 4:19:24 PM	Type TABLE	
<					>
First <u>r</u> ow of data	contains colur	mn headers	ок 🖓	Cancel	

13. The Mail Merge Recipients dialog will open and show the data contained within the spreadsheet. Make sure that all of the records are checked and click OK:

Data Source		Last Name	First Name	✓ Street Address	City
Customers.xlsx		Aiken	Guadalupe	2426 Lighthouse Drive	Branson
Customers.xlsx	~	Chien	Xue	609 Burnside Court	Tempe
Customers.xlsx	~	Cunningham	Marilyn	3771 Friendship Lane	Sunnyvale
Customers.xlsx	~	Frueg	Lucas	2066 Francis Mine	Redding
Customers.xlsx	~	Goodman	Aaron	2248 Neuport Lane	Norcross
Customers.xlsx	~	Hall	Sharon	4974 Bridge Street	Tulsa
Customers.xlsx	~	Petre	Alexander	4132 Duff Avenue	Brattleboro
Customers.xlsx	~	Scott	Barbara	1917 Collins Street	Punxsutawney
<					
ata Source		Refine rec	ipient list		
Customers.xlsx		∧ AJ Sort	<u></u>		
		Filte	er		
		Eine	duplicates		
			1 raciniant		
			reupienta		

14. Click Next in the Mail Merge task pane to advance:



15. Now you will be prompted to set up your envelope. Move your cursor to the center of the envelope until you see the icon change to the I-beam. Click here:

E 5 · C · Document - Word	⊞ – ⊡ ×
File Home Insert Design Layout References Mailings Review View 🖓 Tell me what you want to do	Sign in 👂 Share
Evelopes Labels Sout Mala Select Edit Merger Registerst Sreepiert List Merger Endit Block Line Field * Departe Labels Create Create Control	^
	Arange your envelope Arange your enve
873 Romines MII Road Plano, TX 75074 ♥	 Centroline paragat. More feas. When you have finished annonging you can preview each respense revelope, citic restriction of the service and make any individual changet.
II	

16. Now, click the "Address block" link in the Mail Merge task pane:

Mail Merge
Write your letter
lf you have not already done so, write your letter now.
To add recipient information to your letter, click a location in the document, and then click one of the items below.
Address block
🖹 Greeting lii 💭
Electronic postage
More items
When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.

17. The Insert Address Block dialog will open. Click OK to accept the default settings:

Insert Address Block	? ×
Specify address elements Insert recipient's name in this format: Josh Josh Randall Jr. Joshua Joshua Joshua Joshua Q. Randall Jr. Insert company name Insert postal address: Always include the country/region in the address O Always include the country/region if different than:	Preview Here is a preview from your recipient list: Guadalupe Aiken 2426 Lighthouse Drive Branson, FL 35616 Correct Problems Here and done biochemistic and the formula formul
United States	Match Fields to identify the correct address elements from your mailing list. <u>Match Fields</u> OK Cancel

18. The Address Block merge field will be inserted. Click Next in the Mail Merge task pane:

⊟	ب ه	ت ا								Docume	nt1 - Word	I.				Ð	-	o ×
File	Hom	e Insert	Design	Layout	References	Mail	lings	Review	View	Q Tell me	vhat you v	rant to do					Sign in	A₁ Share
Envelop	es Labels	Start Mail Merge *	Select Recipients * R Start Mail Merg	Edit lecipient List	Highlight Merge Field	Address s Block	Greeting Line Write & I	Insert Me Field	Rule erge 🔂 Mat	es * Ich Fields late Labels	Preview Results	Find Recipi Check for E Preview Results	ent rrors	Finish & Merge * Finish				^
ŝ	873 Plan Plan 7507	tomines h 9, TX 4	6il Road					Addres	sBlocka							Mail N Arzagey Ily out ha Ily out ha oner the Constitution of the Constitution of the States of the seath free makes are	Acres our envelops or envelops or envelops or envelops or envelops or envelops of envelops	✓ X
																Step 4 of → Next ← Prev	6 : Pteview you ious: Select ri	r emelopes cipDs
Page 1 d	of 1 8 we	irds D2	11												88	E6 -	-	+ 117%

19. Now, a preview of your envelope will be shown. Make sure that everything is correct. (If you need to change anything, click the Previous link at the bottom of the task pane.) When you are satisfied, click Next:

File Norme Inset Design Loyad Reference Malings Romer You Q Tale masked you sand to do.	Sign i	A Share
Constructions Construction Construction		
Merger Recipients Recipient List Merge Fields Block Line Field - Check for Errors Merge- Start Mail Merge Write & Insert Fields Write & Insert Fields Preview Results Finish		^
873 Romines Mil Road Pino, 1X 15074 ♥ Guadatupe Aiken 2426 Lidebhoven Drin	Mail Merge Preview your enver One of the merger previewed here: the totological Previewed here: Previewed here: Previe	v X v
2426 Lighthouse Drive Branson, FL 35616	Step 5 of 6 → Next: Complet ← Previous: Arra	ithe merae ge yoor envelop

20. Click "Edit individual envelopes" in the Mail Merge Wizard to complete the merge:



21. You will be prompted to select which records to merge. Leave the All radio button selected and click OK:

Merge to Ne	ew Document	?	×
Merge record	ds record		
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	ок 🔓	C	ancel

22. This will create a new document with an envelope for each person on each page:

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Prime Pare Described pill If and Pare If and Pare Pare<	File Home Insert Design Layout References Mailings Review View 🖓 Tell me what you want to do	Sign in 🙎 Share
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23. Save the documents as Activity 8-2A Complete and Activity 8-2B Complete, and then close Word to complete this activity.

TOPIC C: Create a Data Source Using Word

In order for a mail merge to work properly, your data source must be correctly configured. In this topic, we will take a closer look at working with data sources.

Topic Objectives

In this topic, you will learn:

- What a data source is
- The guidelines for creating a data source
- How to create a data source using Microsoft Word

DATA SOURCES

As we discussed at the beginning of this lesson, **the data source** is the file that contains the information that will be used during the merge, such as a list of addresses.

You can choose the desired data source in the third step of the Mail Merge Wizard, or using the Select Recipients menu on the Mailings tab:

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File H	lome	Insert Design	Layout	References	Mailings	Review							Sign in	۶.	hare
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There are three options:

- Type a new list using Microsoft Word
- Use an existing list (such as an Access database, Excel spreadsheet, Word document, or text file)
- Select data from your Outlook contacts

DATA GUIDELINES

If you are creating a data source, follow these guidelines to ensure that it will be interpreted properly during the mail merge:

- The first row of the data should contain field headers that describe each column of data.
- Each of these field names must be unique.
- Field names must be less than 40 characters and should start with a letter.

As well, try to use Microsoft Word's default fields as your field headers:

Customize Address List			?	\times
<u>F</u> ield Names				
Title		^	<u>A</u> d	d
First Name Last Name			_	
Company Name			<u>D</u> e	lete
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City			_	
State ZIR Code				
Country or Region				
Home Phone				
E-mail Address			May	e l le
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You can create custom fields and map them to your data source if necessary, but it is far easier to use the existing fields.

CREATING A DATA SOURCE USING WORD

During a mail merge, you can create a data source on the fly using Microsoft Word. To do this, select "Type a new list" in the third step of the Mail Merge Wizard and then click Create. Or, click Mailings \rightarrow Select Recipients \rightarrow Type a New List:

	ن ه	، گ						N	Aail Merge Letter	- Word				æ	-		×
File	Home	Inser	: Design	Layout	References	Mailings	Review								Sign in	Яs	hare
Envelop	es Labels	Start Mail Merge *	Select Recipients * Recipi Type a New Usg an Exist Choose from	Edit pient List v List m Outlook	Highlight Merge Fields	Address Greeti Block Line Write	ng Insert Mer e Field - & Insert Fields	[²] Rules - ² ² Match i ge [³ Update	Fields Labels Frevie Result		s M	Finish & Merge * Finish		Mail M Select red Use ar Select Type a	lerge pients existing li from Outli new list	ist bok con	→ ▼ × tacts
						ACME	EWIDG	ETS INC						Type a new Type the r of recipie	v list names and nts.	addres	ses
					87	73 ROMINES	MILL ROAI	D, PLANO, T.	X 75074					5 00	eate		

With either command, the New Address List dialog will open:

New Address Li	st			?	×
Type recipient in	formation in the table. T	o add more entries,	click New Entry.		
Title		- Last Name -	🖌 Company Name 👻	Address Line 1	•
<					>
<u>N</u> ew Entry	<u>F</u> ind				
<u>D</u> elete Entry	Customize Columns		ОК	Canc	el

Here, you can enter your data on each row.

To customize the columns that appear, click the appropriate command near the bottom left-hand corner of the dialog:

New Address Lis	st				?	×
Type recipient inf	formation in the tabl	e. To add mo	re entries, o	lick New Entry.		
Title		👻 Last Na	me 👻	Company Name 👻	Address Line 1	-
<						>
<u>N</u> ew Entry	<u>F</u> ind					
Delete Entry	Customi <u>z</u> e Column	IS		ОК	Canc	el

Now you can add, remove, and rename fields as desired:

Customize Address List	?	×
<u>F</u> ield Names		
Title	<u>A</u> d	d
Last Name Company Name	<u>D</u> e	lete
Address Line 1 Address Line 2	<u>R</u> ena	me
City State		
ZIP Code		
Country or Region Home Phone		
Work Phone	_	_
E-mail Address	Mov	e Up
~	Move	Dow <u>n</u>
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Ne	w Address List				?	×
Тур	e recipient info	rmation in the table. To	add more entries,	click New Entry.		
	Title	✓ First Name ✓	Last Name 🗨	Company Name 👻	Address Line	1 🔻 .
	Mrs.	Sharon	Hall		4974 Bridge	Str
	Dr.	Marilyn	Cunningham		3771 Friends	ship
	Mr.	Aaron	Goodman		2248 Neupo	rt L
\triangleright	1					
<						>
<u>N</u>	lew Entry	<u>F</u> ind				
D	elete Entry	Customi <u>z</u> e Columns		ОК	Car	ncel

Once the list is complete, click OK to save it:

You will be prompted to enter a file name. Leave the file type and the location at the default settings and click Save:

👿 Save Address List							\times
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Microsoft Word	3						
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•4 Homegroup							
File name:	September Leads						~
Save as type:	Microsoft Office Address Lists						\sim
Alide Folders			Тоо	ls 👻 [Save	Cancel	

You will see the Mail Merge Recipients dialog once gain. Click OK to confirm that you want to use it in this mail merge. You will now be able to use this list in future mail merges as well.

You can also edit the list using the Mail Merge Wizard or the Mailings tab:



Either command will re-open the Mail Merge Recipients list, where you can make the desired changes.

АСТІVІТУ 8-3

Creating a Data Source Using Word

You have been given a list of names and addresses in PDF format that needs to be turned into a proper data source. In this activity, you will complete this task. You will need a PDF reader for this activity.

1. First, open the Activity 8-3 Data Source file:



You can print this file to paper or leave it open and read from your screen.

2. You will see that this document contains poorly formatted, inconsistent data. It needs a number of improvements before it can be used as a data source:

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		Gab 269 Ste GOX 819 gab	eph P. Wri oriel Migne 17 St Jean I Angele De C 2HO I-222-0450 riel@migr	ght, 1770 Islin eault Baptiste St E Laval, QC meault.com	ngton Ave, To	ronto, ON, MBV	386, phone 416-253-3972,	e-mail <u>sirwrig</u> t	it@toronto.r	2						

3. Now, open Microsoft Word 2016 to a blank document. Click Mailings \rightarrow Select Recipients \rightarrow Type a New List:



4. The New Address List dialog box will open. We need to customize the available columns, so click the Customize Columns command:

New Address Li	st					?	×
Type recipient in	formation in the table	. To a	dd more en	tries, c	lick New Entry.		
Title		- L	.ast Name	-	Company Name 👻	Address Line	1 🗸
<							>
<u>N</u> ew Entry	<u>F</u> ind						
Delete Entry	Customi <u>z</u> e Columns				ОК	Can	cel

5. Select the Company Name field and click Delete:

Customize Address List	?	×
<u>F</u> ield Names		
Title	<u>A</u> c	id
Last Name	D	lata N
Company Name		
Address Line 1 Address Line 2	<u>R</u> en	ame
City		
ZIP Code		
Country or Region		
Work Phone		
E-mail Address	Mo	/e <u>U</u> p
×	Move	Dow <u>n</u>
ОК	Ca	ancel
6. Click Yes to confirm the operation:



7. Repeat steps 5 and 6 to delete the Work Phone field:

Customize Address List		?	×
<u>F</u> ield Names			
Title First Name Last Name	^	Ac	ld
Address Line 1 Address Line 2			
City		<u>R</u> ena	ame
ZIP Code			
Country or Region Home Phone			
Work Phone E-mail Address			
		Mov	re <u>U</u> p
	~	Move	Dow <u>n</u>
OK		Ca	incel

8. Next, click Add:

Customize Address List			?	×
<u>F</u> ield Names				
Title First Name Last Name Address Line 1 Address Line 2 City State ZIP Code Country or Region Home Phone E-mail Address		~	<u>A</u> d De <u>R</u> ena	ld lete
			Mov	re <u>U</u> p
		\sim	Move	Dow <u>n</u>
	OK		Ca	incel

9. In the Add Field dialog, type "Renewal Date" for the field name and click OK:

Add Field	?	×				
Type a <u>n</u> ame for your field Renewal Date						
ОК	Ca	ncel				

10. You will be returned to the Customize Address List dialog. Click the Title field and click Rename:

Customize Address List		? ×
Eield Names Title First Name Last Name Address Line 1 Address Line 2 City State ZIP Code Country or Region Home Phone Bargard Data	^	<u>A</u> dd <u>D</u> elete <u>R</u> ename
E-mail Address	~	Move Up Move Dow <u>n</u>
	ОК	Cancel

11. In the Rename Field dialog box, enter "Salutation" for the new field name and click OK:

Rename I	Field		?	×
Change fi	eld name			
From:	Title			
<u>T</u> o:	Salutation			
		ОК	C C	ancel

12. Click OK to close the Customize Address List dialog:

Customize Address List			?	×
<u>F</u> ield Names				
Salutation First Name	~		<u>A</u> d	d
Last Name Address Line 1			<u>D</u> el	ete
Address Line 2 City			<u>R</u> ena	me
State ZIP Code				
Country or Region Home Phone				
Renewal Date E-mail Address				
			Mov	e Up
	~	/ [Move	Dow <u>n</u>
	OK	2	Car	ncel

13. Now, fill in the first row of data shown in the PDF file, pressing Tab to move from field to field. Be sure to abbreviate California to CA, as the other entries are:

New Address List	t				?	\times		
Type recipient info	(ype recipient information in the table. To add more entries, click New Entry.							
	✓ Country or Re ▼	Home Phone	 Renewal Date 		ail Addre:	ss 🔻		
95814				ima	n@acm	e.com		
<						>		
<u>N</u> ew Entry	<u>F</u> ind							
Delete Entry	Customize Columns		ОК		Can	cel		

14. When you press Tab after the last field (E-mail Address), a new row will be created:

New Address Lis	t				?	×
Type recipient inf	ormation in the table	. To add mo	re entries, (click New Entry.		
Salutation		👻 Last Na	me 🔻	Address Line 1 👻	Address Line	2 🗸
Ms.	Wilma	Baugh	man	2521 Timber Ri		
<						>
<u>N</u> ew Entry	<u>F</u> ind					
Delete Entry	Customize Columns			ОК	Car	ncel

15. Enter the next set of information from the PDF file (for Inez Bell) on this row. Be sure to format the date just like the last entry and spell out the word "Drive" rather than using an abbreviation:

 ZIP Code 95814 	 Country or Re 	 Home Phone 	Densuural Data	E ALL
95814				 E-mail Address
22011	USA	916-812-7384	01/2020	wbaughman(
99336			05/2025	zJBell@rhyta.c

16. Continue entering information from the table and the list underneath it, correcting errors as you go.

The following information may help:

- Irvine is in California.
- Laquita is a female name.
- Gabriel is a male name.
- Middle initials can be omitted.
- Instead of zip codes, Canada uses postal codes that are a combination of letters and numbers. These can be entered in the ZIP Code field.
- The renewal date for all Canadian customers is January 1, 2021.

17. When you are finished, click OK:

New A	Address List				? ×
<u>Type</u> re	ecipient informatio	on in the table. To a	dd more entries, o	lick New Entry.	
v Z	ZIP Code 🛛 👻	Country or Re 👻	Home Phone	Renewal Date 👻	E-mail Address 👻
9	95814	USA	916-812-7384	01/2020	wbaughman@
9	99336	USA	509-582-5716	05/2025	InezJBell@rhyta
9	91801	USA	626-497-7813	06/2020	GeorgeLValenci
4	49738	USA	989-619-4993	03/2022	reneet@popma
9	92614	USA	818-355-2884	12/2023	jlopez@zoomai
Т	F1A0N1	Canada	403-529-5463	01/2021	Laquita.Massar
N	M8V3B6	Canada	416-253-3972	01/2021	sirwright@toro
B					@migneault.com
<					>
New	v Entry	<u>F</u> ind			
<u>D</u> elet	te Entry Custo	mi <u>z</u> e Columns		OK	Cancel

18. The Save Address List dialog will open. Enter Activity 8-3 for the file name and click Save:

📲 Save Address List										×
A Control of the second dependence of								ta Sources	, P	
Organize 🔻 Ne	w folder									?
 ♀ Quick access Desktop ♦ Downloads ⋈ Documents ♥ Pictures ♦ Music ♥ Videos ♥ Microsoft Word ♦ OneDrive ■ This PC 	Na * * *	me	^		Date modified No items ma	Type tch your search.	Size			
💣 Network 崤 Homegroup										
File name: Save as type:	Activity 8-3 Microsoft O	ffice Address List	ts							~
Hide Folders							Tools 💌	Save	Can	icel

19. The list will now be complete. Close Microsoft Word 2016 without saving your document.

Summary

In this lesson, you learned all about mail merge. We began by discussing simple mail merges, moved on to creating envelopes and labels, and finished by learning how to create a data source from scratch. You should now feel ready to perform your own mail merges to create all types of personalized documents.

REVIEW QUESTIONS

- 1. Which tab contains many of the commands used during a mail merge?
- 2. Where can you enter or change your return address?
- 3. How do you unlink a data source from a mail merge document?
- 4. What is the command sequence to start the Mail Merge Wizard?
- 5. What is the difference between using the Envelopes command on the Mailings tab and performing an envelope mail merge?

Answer Keys

LESSON 1 REVIEW QUESTIONS

- **1. What are the two contextual tabs available for modifying charts?** The Chart Tools contextual tab set contains the Design and Format tabs.
- What is the command sequence to sort table data? Click Table Tools – Layout → Sort.
- **3.** Which tab other than the Table Tools Layout tab can be used to align table data? The normal alignment commands on the Home tab can be used to align table data.
- **4. What feature do graphical equations not contain?** Equations do not provide mathematical functionality.
- 5. What is the command sequence to edit chart data? Click Chart Tools – Design → Edit Data.

LESSON 2 REVIEW QUESTIONS

- What is the command sequence to save a custom theme? Click Design → Themes → Save Current Theme.
- 2. How do you assign a keyboard shortcut to a style? In the Modify Style or Create New Style from Formatting dialog box, click Format → Shortcut key. Then, click in the "Press new shortcut key" field, press the desired keys, and click Assign. Close the dialog box to complete the process.
- What is the command sequence to create a new list style?
 Click Home → Multilevel List → Define New List Style.
- 4. What type of style contains both a paragraph style and a character style? Linked styles contain both a paragraph style and a character style.
- 5. How do you modify a style's settings? Right-click the style in the Styles task pane or the Styles gallery and click Modify.

LESSON 3 REVIEW QUESTIONS

1. Which command on the Picture Tools – Format tab allows you to sharpen or soften an image?

This statement describes the Corrections button.

- 2. What is the command sequence to add a caption to an image? Click References → Insert Caption.
- 3. List the steps to add a screenshot to a document. Make sure that the window that you want to take a picture of is maximized. Then, bring up Microsoft Word. Click to place your cursor wherever you want the image to be inserted. Finally, click Insert → Screenshot, and click the window that you want to take an image of.
- **4.** What aspects of a picture style can be customized? The border and effects can be customized.

LESSON 4 REVIEW QUESTIONS

- 1. Which two contextual tabs are available when editing SmartArt diagrams? The SmartArt contextual tab set includes the Design tab and the Format tab.
- 2. What is the command sequence to create a drop cap in the margin of a paragraph? Click Insert → Drop Cap → Margin.
- **3.** Which contextual tab is available when working with shapes and text boxes? The Drawing Tools – Format tab is available for objects like shapes and text boxes.
- 4. What is the easiest way to add an image from the Internet to a SmartArt diagram that contains picture placeholders? Click the picture placeholder. Then, use the Insert Pictures dialog to search for the appropriate image.
- 5. In Microsoft Word, what is a drawing canvas? A drawing canvas is a container that you can add multiple shapes to.

LESSON 5 REVIEW QUESTIONS

1. What are Quick Parts?

Quick Parts are reusable chunks of content, such as a company motto or a document property.

2. What are document properties based on?

Document properties are based on the properties of the file itself.

3. What are the steps to saving a custom building block? To start, select the desired object(s). Then, click Insert → Quick Parts → Save Selection to Quick Part Gallery. Finally, set your options in the Create New Building Block dialog box and click OK.

4. What is the command sequence to insert a custom cover page that was previously saved as a building block?

Click Insert \rightarrow Cover Page and choose the saved cover page from the menu.

5. What is the shortcut key to lock a field to prevent it from updating?
 To lock a field, press Ctrl + F11 with it selected. To unlock it, select it and press Ctrl + Shift + F11.

LESSON 6 REVIEW QUESTIONS

- How do you open the Paragraph dialog box?
 Click the option button in the Paragraph group of the Home tab.
- 2. What is the command sequence to format a selected block of text into three columns? Click Layout → Columns → Three.
- Name two types of section breaks available in Microsoft Word. The four available types of section breaks are Next Page, Continuous, Even Page, and Odd Page.
- 4. What is the command sequence to insert text from a file? Click Insert → Object → Text from File. Then, use the Insert File dialog box to locate and select your file.
- Which tab contains commands to create and break text box links? These commands are found on the Drawing Tools – Format tab.

LESSON 7 REVIEW QUESTIONS

1. When updating styles, what is the difference between attaching a template and using the Organizer?

Attaching a template updates all styles, while using the Organizer allows you to update only select styles.

- 2. What tab provides commands to manage templates? You will find these commands on the Developer tab.
- **3. What is the default template location?** By default, custom Word templates are stored in the Custom Office Templates folder in your user account's Documents folder.
- 4. What is the first step to creating a template? First, create the document with placeholder information.
- True or False: Document wizards have been removed from Microsoft Word 2016. This statement is true. By default, document wizards are no longer available in Microsoft Word.

LESSON 8 REVIEW QUESTIONS

- 1. Which tab contains many of the commands used during a mail merge? The Mailings tab contains commands related to mail merge.
- Where can you enter or change your return address? The Advanced category of the Word Options dialog contains a text field where you can enter or modify your return address.
- **3.** How do you unlink a data source from a mail merge document? Click Mailings → Start Mail Merge → Normal Word Document.
- 4. What is the command sequence to start the Mail Merge Wizard? Click Mailings → Start Mail Merge → Step-by-Step Mail Merge Wizard.
- 5. What is the difference between using the Envelopes command on the Mailings tab and performing an envelope mail merge? The Envelopes command will let you create one envelope at a time, while an envelope mail merge will let you create envelopes for each entry in a data source.

APPENDICES

Keyboard Shortcut Quick Reference Sheet

	Open a new document	Ctrl + N
men	Save a file	Ctrl + S
anage	Open a file	Ctrl + O
ile M	Print document	Ctrl + P
	Close Microsoft Word	Alt + F4
	Select all	Ctrl + A
	Copy text	Ctrl + C
	Cut text	Ctrl + X
iting	Paste text	Ctrl + V
Text Ed	Duplicate image or object	Ctrl + D (w/object selected)
	Toggle Format Painter on	Ctrl + Shift + C
	Undo last action	Ctrl + Z
	Redo last action	Ctrl + Y
	Open Macros dialog	Alt + F8
	Open Visual Basic for Applications	Alt + F11
alogs	Open Create New Building Block dialog	Alt + F3
Open Di	Open Font dialog	Ctrl + D (w/text selected)
	Get help	F1
	Check spelling	F7

	Apply bold formatting	Ctrl + B
	Apply underlining	Ctrl + U
	Apply italic formatting	Ctrl + I
	Align text to center	Ctrl + E
ols	Align text to left	Ctrl + L
ng To	Align text to right	Ctrl + R
matti	Justify text	Ctrl + J
kt For	Increase font size	Ctrl + Shift + .
Тех	Decrease font size	Ctrl + Shift + ,
	Change font face via Font dialog	Ctrl + Shift + F
	Change font size via Font dialog	Ctrl + Shift + P
	Cycle through cases	Shift + F3
	Clear formatting	Ctrl + Spacebar
	Reveal formatting	Shift + F1
	Open Apply Styles task pane	Ctrl + Shift + S
S	Open Styles task pane	Alt + Ctrl + Shift + S
nand	Apply Normal style	Ctrl + Shift + N
Styles Comn	Apply Heading 1 style	Alt + Ctrl + 1
	Apply Heading 2 style	Alt + Ctrl + 2
	Apply Heading 3 style	Alt + Ctrl + 3
	Show formatting marks	Ctrl + Shift + 8
	Insert page break	Ctrl + Enter

ation	Move one cell to the right	Tab (right arrow if cell is empty)
	Move one cell to the left	Shift + Tab (left arrow if cell is empty)
	Move one row up	Up arrow key
Navi	Move one row down	Down arrow key
Table	Go to first row	Alt + Page Up
	Go to last row	Alt + Page Down
	Go to first column	Alt + Home
	Go to last column	Alt + End
Mail Merge	Preview the merge	Alt + Shift + K
	Perform the merge	Alt + Shift + N
	Print the document	Alt + Shift + M
	Edit the merged document	Alt + Shift + E
	Insert an empty field	Ctrl + F9
	Update a field	F9
Fields	Unlink a field	Ctrl + Shift + F9
	Lock a field	Ctrl + F11
	Unlock a field	Ctrl + Shift + F11
	Toggle between field code/value display	Alt + F9

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.

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.

cell

The area where a row and column intersect in a table.

chart

Graphical representation of data and relationships in a dataset.

clipboard

An area of your computer's memory that stores cut and copied items.

column Vertical elements in a table.

contextual tabs

Special tabs that appear when you are working with a specific object.

data source

File that contains external data for a particular operation, such as a chart or a mail merge.

drawing canvas

A container that you can add multiple shapes to.

drop cap

A capital letter at the beginning of a paragraph that is larger than the other letters. Is often dropped down into the paragraph.

equation

A diagram that demonstrates mathematical calculations. Does not provide functionality.

field A placeholder for variable text.

field code

The programming that tells Microsoft Word what to display in the actual field.

font

A complete set of characters, including typeface and style.

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.

formula

A mathematical expression used to calculate data.

function

The action specified in a formula that determines what mathematical operation(s) will be performed on the target data.

kerning

Feature that adjusts the spacing between letters so that it looks consistent.

line break

Feature that creates a new line while retaining the formatting from the previous line.

macro

A small program that is created to complete a specific task or set of tasks.

mail merge

The process of combining a document and a data source to generate customized results.

margin

The white space separating text from the edge of a page or other object.

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.

Organizer

Tool that allows the user to manage macros and styles in documents and templates.

page break

Horizontal line that indicates where one page ends and another begins.

Quick Access toolbar

Customizable toolbar providing quick access to frequently used commands.

Quick Parts

Reusable chunks of content that can be customized and modified.

Quick Table

A type of table template that allows the user to quickly insert objects like calendars and matrices.

ribbon interface

The group of commands at the top of the Microsoft Word screen. Encompasses File tab, Quick Access toolbar, tabs, and groups.

row

Horizontal elements in a table.

screenshot

An image of a computer screen.

section

A particular part of a document delineated by section breaks.

shape

In Microsoft Word, any one of a number of drawn geometric objects.

SmartArt

Microsoft Word feature that allows you to create and edit diagrams.

sort fields

The criteria that data is sorted by.

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

An object that allows the user to organize information in rows and columns.

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.

text box

An object that is primarily designed to hold text but can also hold other graphics. Sidebars and pull quotes are two types of text boxes.

text wrapping

Options that control how a graphic interacts with the text around it.

theme

A pre-designed combination of colors, fonts, and effects.

Widow/Orphan Control

Setting that keeps a paragraph together so that single lines are not abandoned at the top or bottom of a page.

WordArt

Microsoft Word feature that allows you to insert stylized text.

Index

Α

Alignment Guides

В

Building Blocks	
Creating	
Deleting	
Inserting	
Modifying	
Sorting	
Template warning	
Viewing	
What are?	

С

Caption	
Customizing	
Inserting	
What is?	
Chart	
Adding caption to	
Adding title to	
Available types	
Changing type	
Components of	
Design tab	
Editing data	
Entering data	
Filtering data	
Format tab	
Inserting	
Quick Analysis buttons	
Saving as template	
What is?	
Columns	
Formatting text as	
Setting advanced options	
Customize Keyboard Dialog Box	61
And styles	
Clearing shortcuts	

D

Developer Tab	
Enabling	286, 293
Template commands	287, 294

Drop Cap	
Customizing	
Inserting	
Removing	
What is?	

Ε

Envelopes and Labels	
Configuring return address	
Creating single	
Creating with mail merge	
Entering text	
Setting options	
Equations	
Aligning	
Design tab	
Inserting	
Switching to Linear	
Switching to Professional	
What are?	

F

Field	
And field code	220, 226
Inserting	222, 225
Locking/unlocking	223, 226
MacroButton	
Updating	223, 248
Viewing code	221, 226
What is?	204, 220
Font Options	
Character spacing	55, 71
Kerning	55
Scaling	55
Formula	
Available functions	
Customizing number format	18, 22, 25
Inserting	17, 21, 24
Locking	
Referencing cells in	
Syntax	
Updating	
What is?	

Н

Headers and Footers	
And themes	
Clearing page numbers from	
Closing view	
Editing	
Formatting page numbers	
Identifying	

Inserting	
Linking/unlinking	
Navigating	

I

Images			
Adding artistic effects	114,	119,	125
Adding captions to		138,	141
Adjusting brightness and contrast	114,	115,	116
Adjusting saturation		114,	116
Adjusting tone		114,	116
Aligning			148
And Background Removal tab			121
Applying 3-D effect to			126
Applying style to		122,	125
Arranging			140
Changing			114
Compressing		114,	120
Crop aspect ratio			109
Cropping to fill			109
Cropping to fit			109
Cropping to shape		109,	111
Customizing wrap points		· · · · · · · · ·	132
Deleting cropped areas		120,	129
Editing background		114,	121
Flipping			136
Format Picture task pane			
Effects category	114,	119,	127
Picture category	114,	115,	118
Inserting	·····		139
Inserting screenshot		144,	147
Layout dialog box			
, Position tab		107,	134
Size tab			137
Text Wrapping tab			132
Layout Options command			130
, Making portions transparent			117
Moving		112,	135
Positioning		, 133,	140
Recoloring	114,	116,	124
Resetting		, ,	114
Resizing	106.	110.	148
Rotating		136.	141
Sharpening		114.	115
Simple cropping			108
Softening		114	115
Text wrapping			130
Inserting Text from File		257	260
		,	200

М

Macro	
MacroButton field	
Mail Merge	
Choosing document type	

Completing	
Configuring return address	331, 335
Data Source	
Creating in Word	
Customizing fields	
Editing	
Linking document to	
Saving	
Supported types	
Tips for creating	
Unlinking	
What is?	
Defining rules	
Editing individual documents	
Electronic postage	
Envelopes	327, 337
Fields	
Customizing display	313, 322, 323
Identifying	
Inserting	.304, 312, 321, 323, 341
Types of	
Mailings tab	
Opening existing document	
Performing with wizard	309, 317, 337
Previewing	313, 325, 343
Process of	
Selecting recipients	310, 318, 338
What is?	
Microsoft Office Excel	
Microsoft Visual Basic for Applications	

N

Navigation Pane

0

Organizer			
Managing styles with	289,	290,	294
Opening			289

Ρ

Paragraph Dialog Box					
Line and Page Breaks tab	.230,	234,	237,	239,	361

Q

Quick Parts	
Return address	
Types of	
What are?	

S

Screenshot	See Images
Section Breaks	
Inserting	
lypes of	
Uses for	
What are?	
Selection Pane	
Shapes	470
Adding caption to	
Adding text to	
Applying style to	
Applying style to text	
Arranging	
Customizing wrap points	
Editing toxt in	
Luiting text in	166 167 170
Inserting drawing canvas	168
Layout dialog box	
Position tab	171 177
Size tah	
Lavout Ontions button	170
Overview of Drawing Tools – Format tab	155
Positioning	177
Resizing	
Setting wranning style	169
Types of	
What are?	
SmartArt	
Adding images to	
Adding text to	
Available types of graphics	
Changing color scheme	
Changing layout of	
Design tab	
Format tab	
Inserting	189, 196
Resizing	
Showing Text pane	191, 197
What is?	
Style Sets	
Changing	89, 101
Creating custom	
Deleting	
Previewing	
What are?	
Styles	
Applying with gallery	
Applying with mini toolbar	53
Applying with task pane	53
Assigning shortcut key to	
Character styles	
Create New Style from Formatting dialog box	
Creating	56, 66, 73, 76, 79, 83
Define New List Style dialog box	
Deleting	

Heading	
Linked paragraph and character	49, 104, 359
List	49, 73, 83
Managing with the Organizer	
Modifying	
Opening Styles task pane	
Paragraph	
Style Sets	See Style Sets
Table	
Types of	
What are?	

Τ

Tables	
Aligning	
Applying style to	
Changing cell alignment	11, 13, 15
Changing text direction	
Creating formulas	
Layout tab	4, 9, 10, 11, 12, 15, 17
Merging cells	
Sorting data	
Splitting cells	
Template	
And content controls	
And fields	
Attaching to a document	
Creating document from	
Creating new	
Managing with Organizer	
Modifying	
Saving	
Searching for	
Storage locations	
Types of	
Updating styles from	
Using	
Viewing personal	
What is?	
Text Boxes	
Adding 3-D effect to	
Adding effects to text	
Adding shadow to	
Adding text to	153, 154, 163
Applying style to	
Changing direction of text	
Customizing style of	156, 164
Drawing	
Formatting text in	
Grouping	
Inserting	153, 162, 211
Linking	256, 261
Overview of Drawing Tools – Format tab	
Resizing	
Saving to gallery	159 <i>,</i> 165
Types of	

Ungrouping	
Unlinking	
What are?	
Themes	
Accessing custom	
And galleries	
And styles	
Changing	
Creating custom colors	
Creating custom fonts	
Customizing	
Default	
Saving custom	
What are?	

W

Word Options Dialog Box	
Advanced category	
Customize Ribbon category	
Save category	
WordArt	
Aligning	
Converting text to	
Inserting	
Layout Options button	
Overview of Drawing Tools – Format tab	
Resizing	