



Microsoft Office 2016

Word 2016: Part 2

Student Manual

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Microsoft® Office Word® 2016: Part 2

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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:

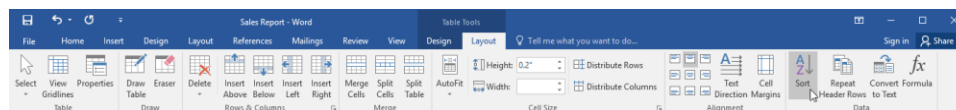
- How to sort tables

SORTING TABLES

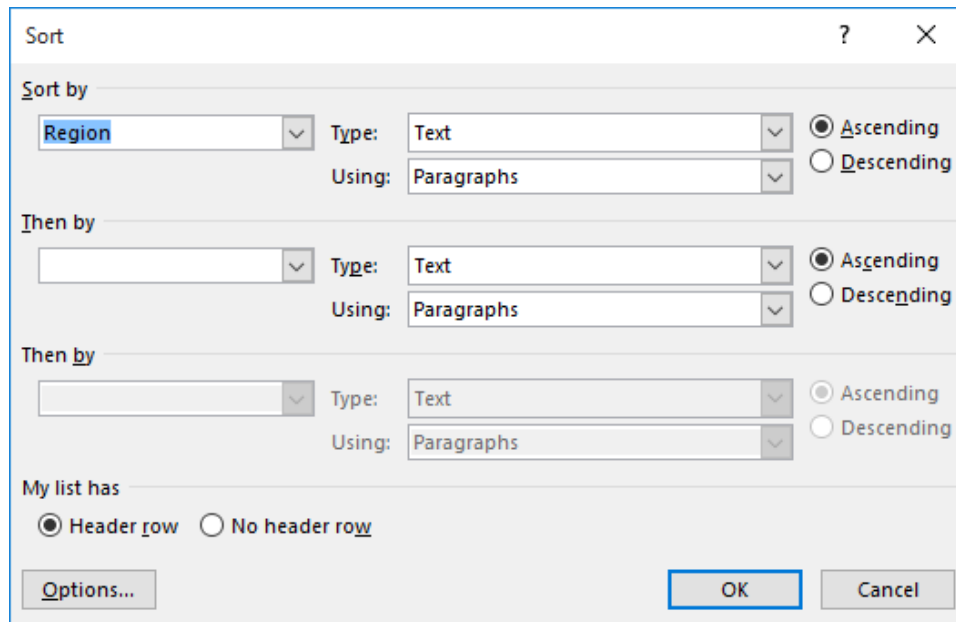
The Sort command on the Table Tools – Layout tab is an excellent tool for arranging data in any way that you want. As an example, take a look at this table:

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:



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



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

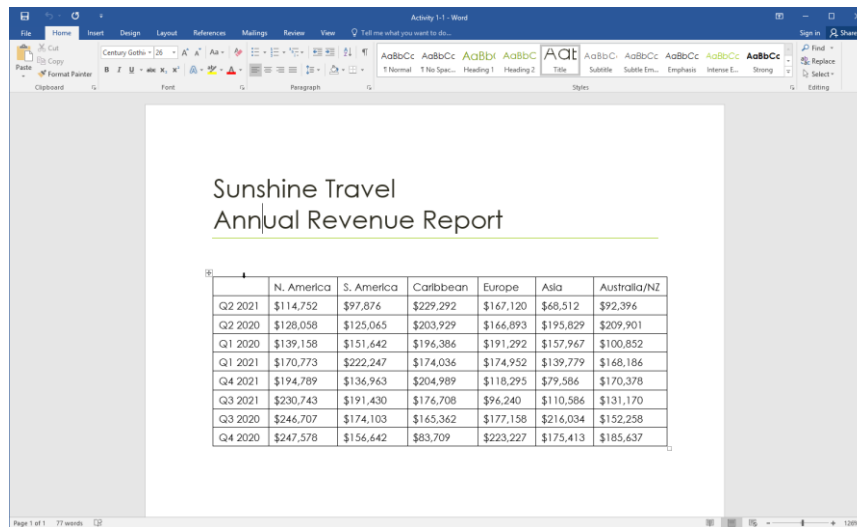
Sorting Table Data

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

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



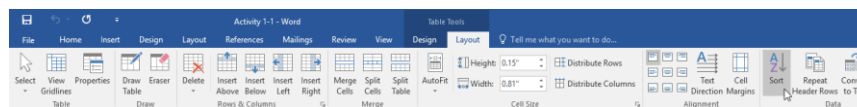
2. Select the first column of the table:



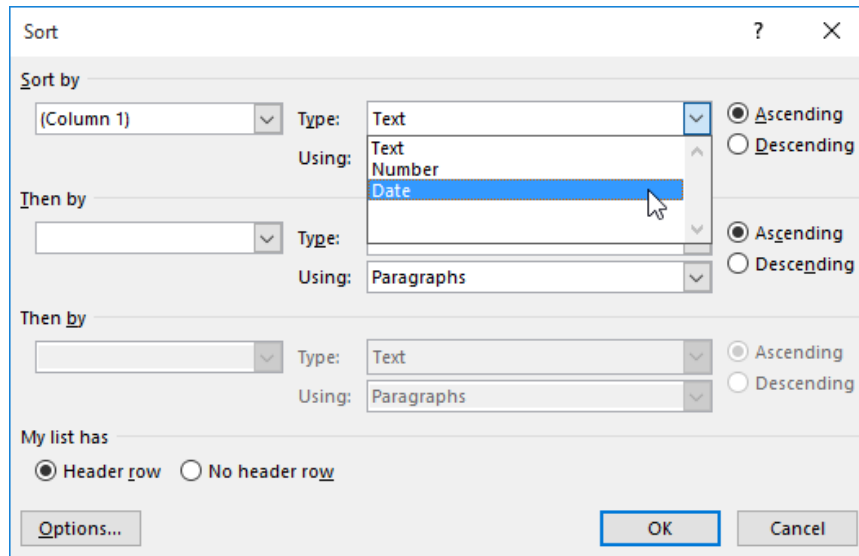
Sunshine Travel
Annual Revenue Report

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

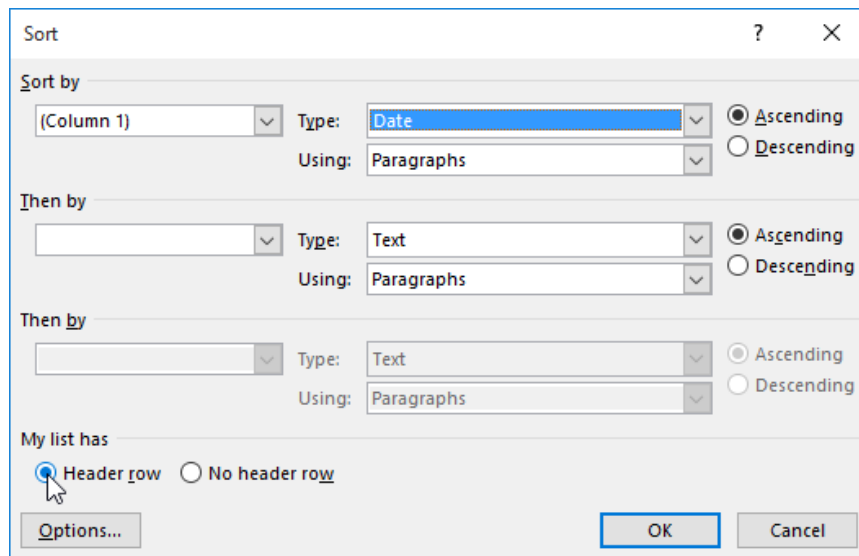
3. Click Table Tools – Layout → Sort:



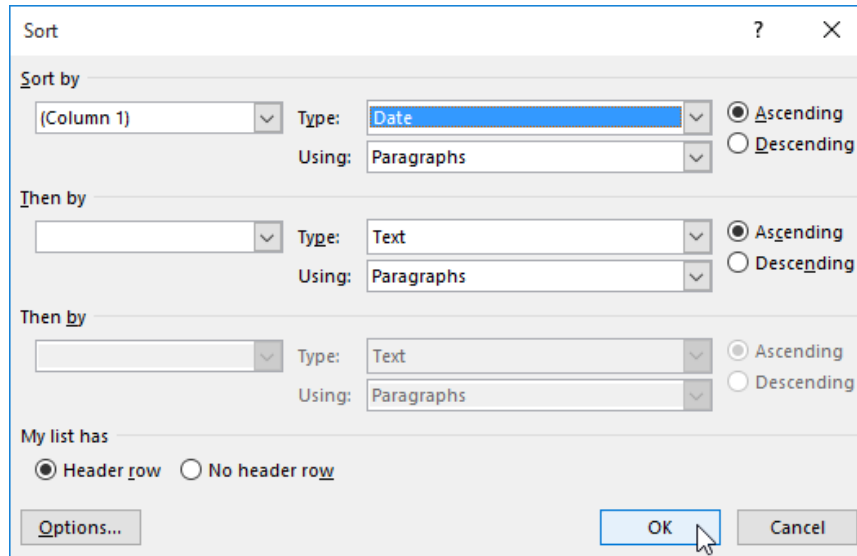
4. Ensure that “(Column 1)” is displayed in the “Sort by” menu. Click the Type menu and choose Date:



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



- Click OK to perform the sort:



- 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

- 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.

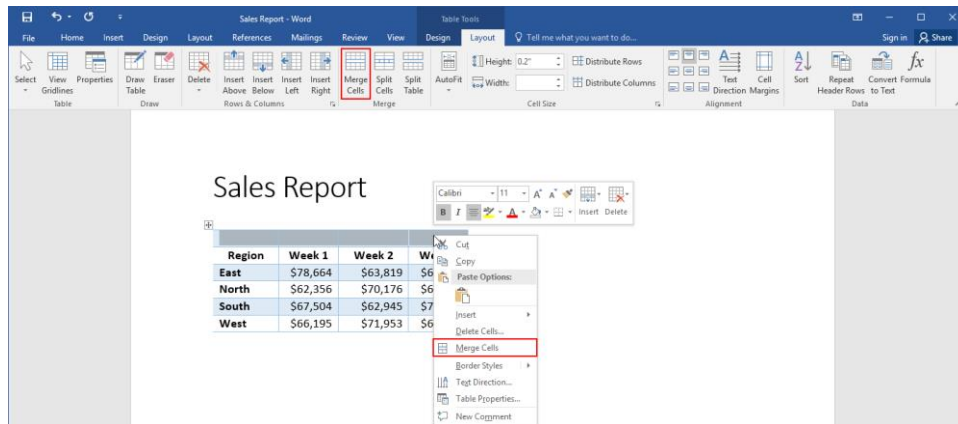
Topic Objectives

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:

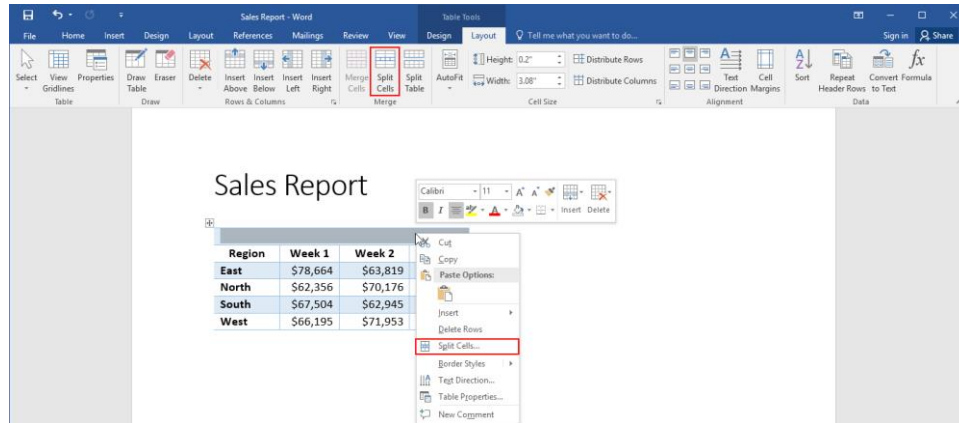


The cells will now be merged together to form one cell:

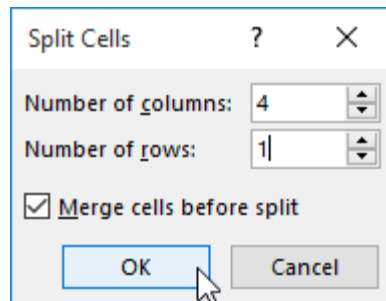
Region	Week 1	Week 2	Week 3
East	\$78,664	\$63,819	\$65,235
North	\$62,356	\$70,176	\$68,871
South	\$67,504	\$62,945	\$72,894
West	\$66,195	\$71,953	\$67,482

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:



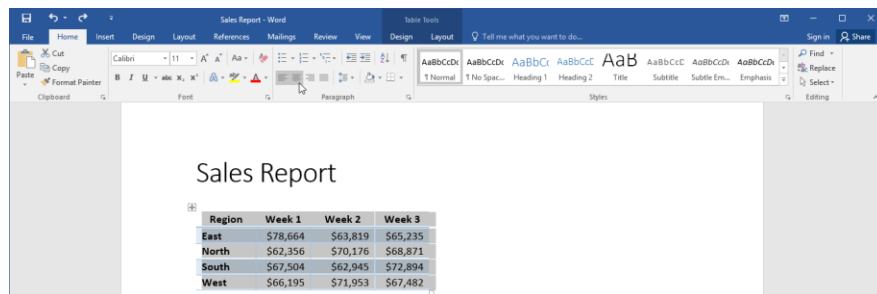
Then, Word will ask you for the configuration of the split. Enter the desired dimensions and click OK:



The split will then be performed.

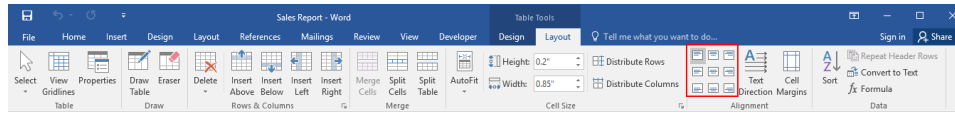
CELL ALIGNMENT

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



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

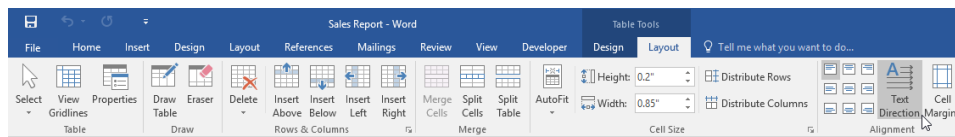
To change both the horizontal and vertical alignment of a cell, use the commands in the Alignment group of the Table Tools – Layout tab:



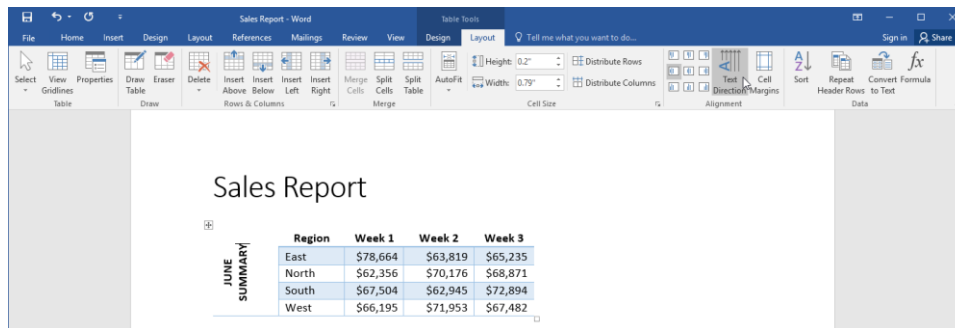
All of these commands can be used on one or multiple cells.

TEXT DIRECTION

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



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



ACTIVITY 1-2

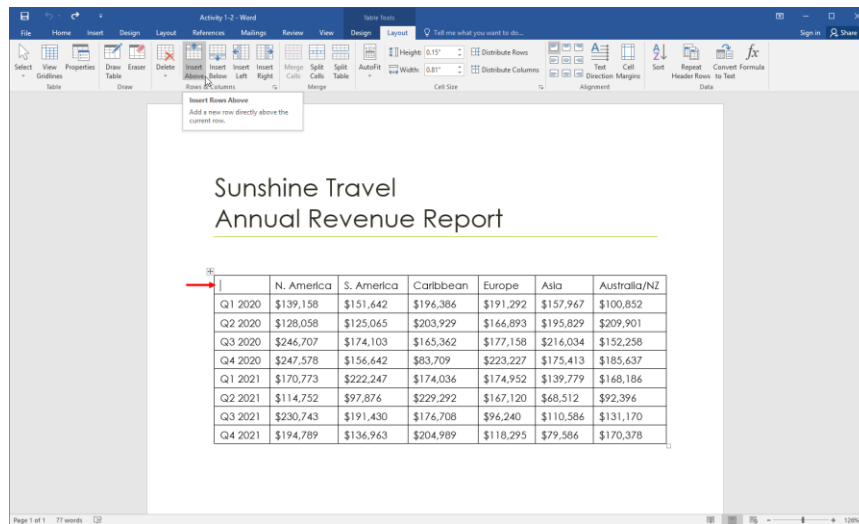
Controlling Cell Layout

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

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



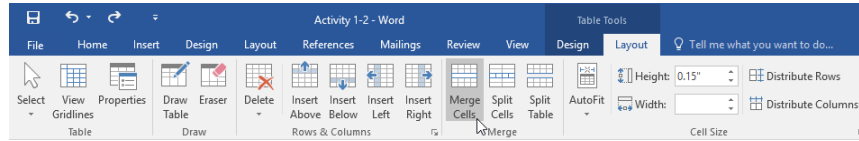
2. Click in the first row of the table to place your cursor there. Click Table Tools – Layout → Insert Above:



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

	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

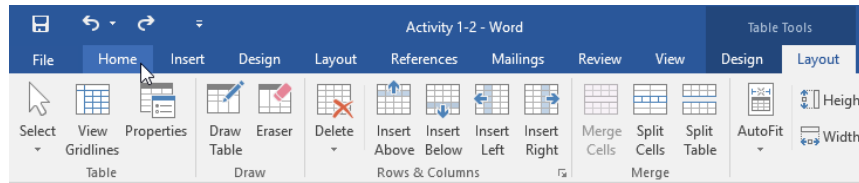
4. Click Table Tools – Layout → Merge Cells:



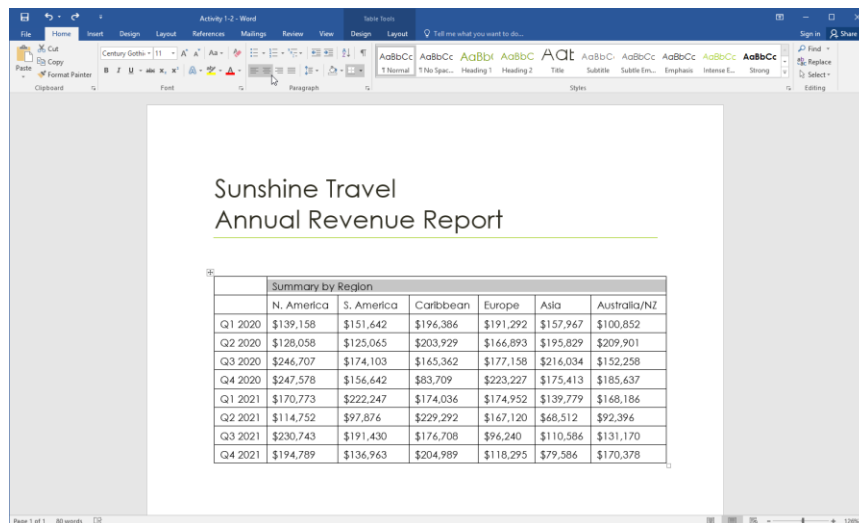
5. Type “Summary by Region” in this new cell:

	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
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Q4 2021	\$194,789	\$136,963	\$204,989	\$118,295	\$79,586	\$170,378

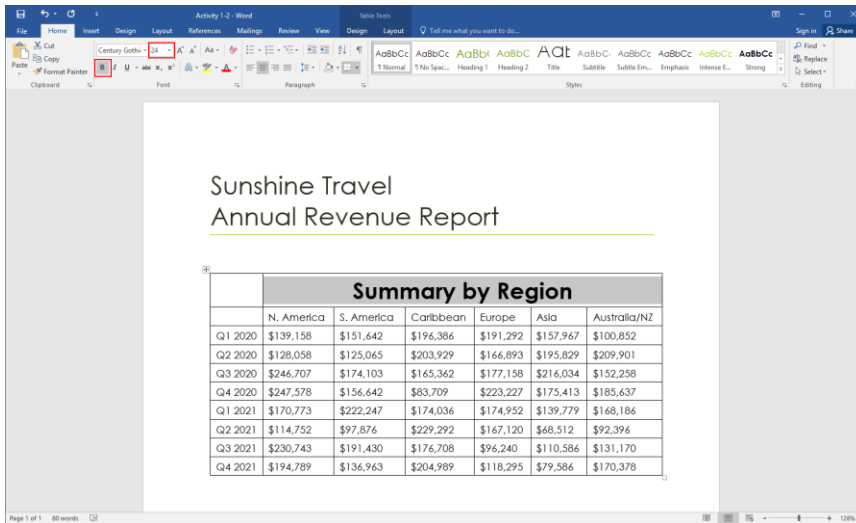
6. Click the Home tab:



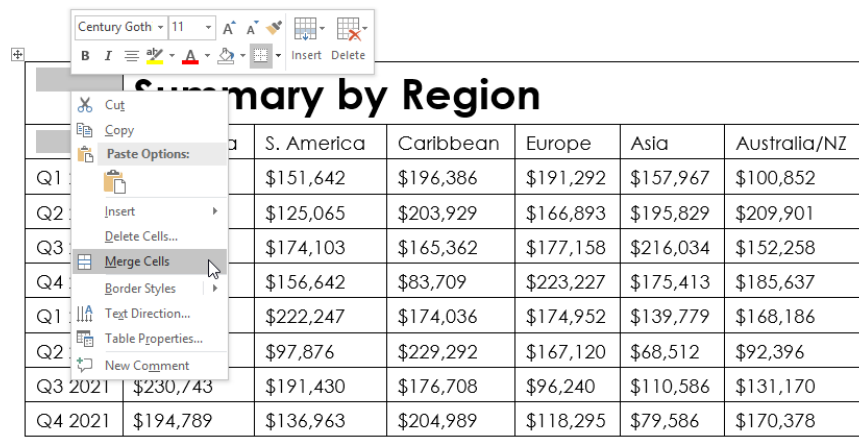
7. Select the merged cell. Center-align the text:



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



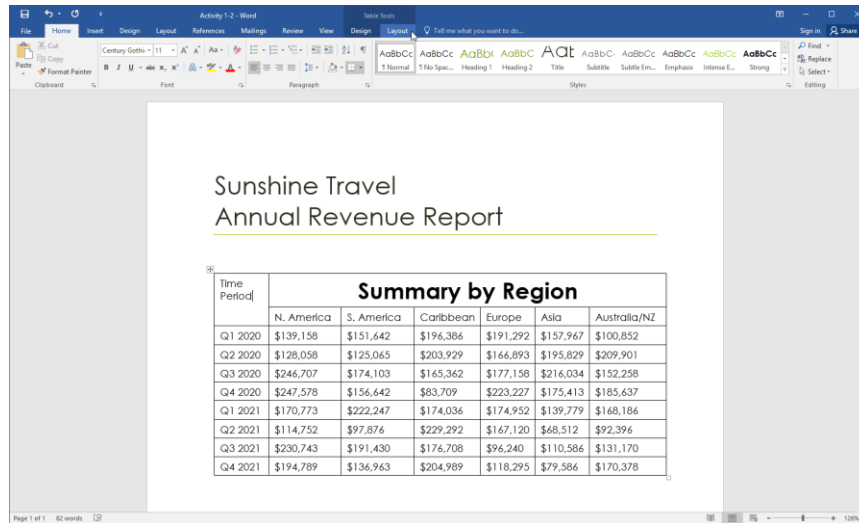
- Select the two blank cells in the first two rows of this table. Right-click the selection and click Merge Cells:



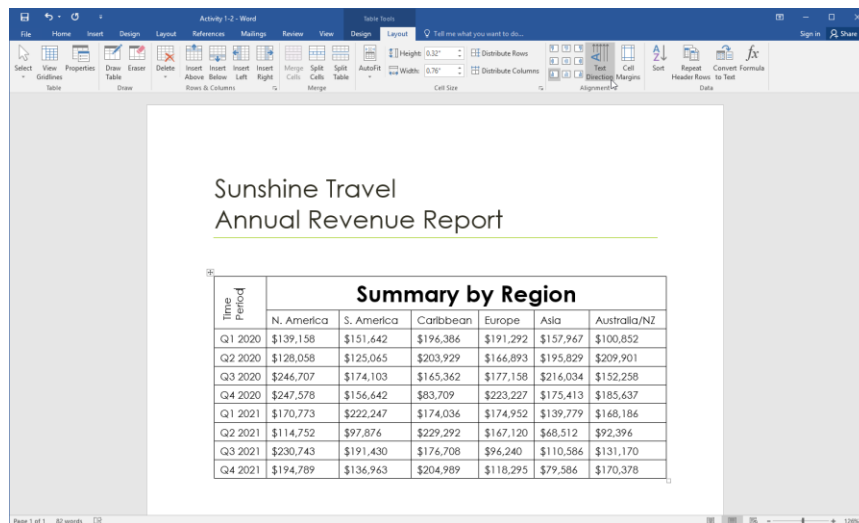
- Type "Time Period" in this new cell:

Time Period	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
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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

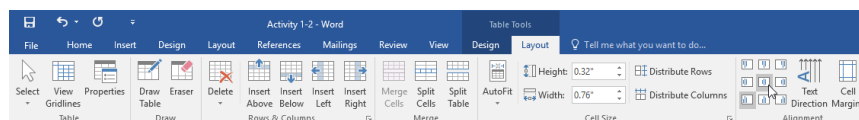
- With your cursor still in that cell, click the Table Tools – Layout tab.:



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



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



- 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:

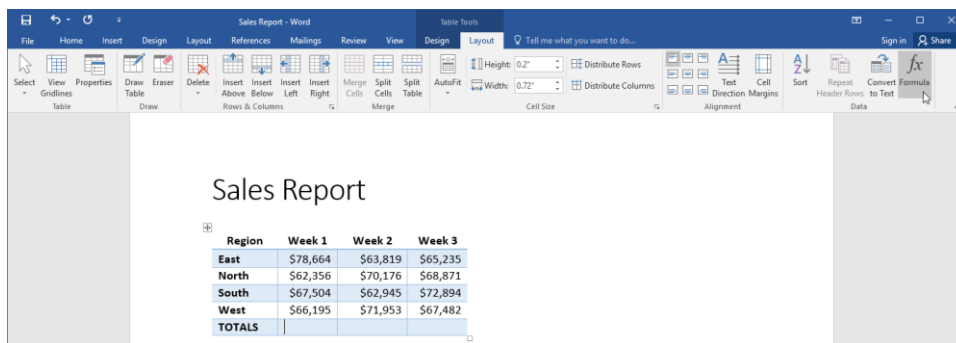
`=SUM(ABOVE)`

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

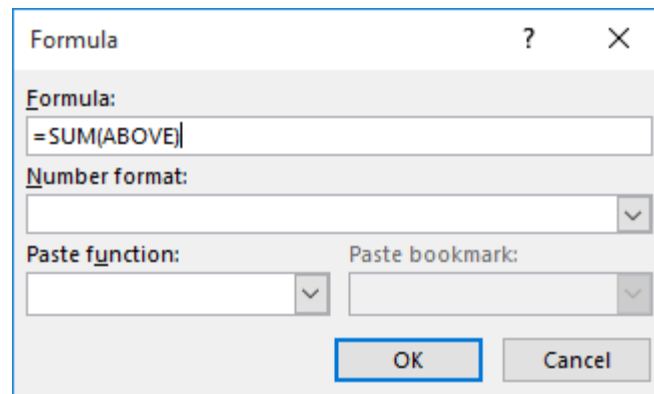
`=SUM(B2:B5)`

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 → Formula:



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:



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

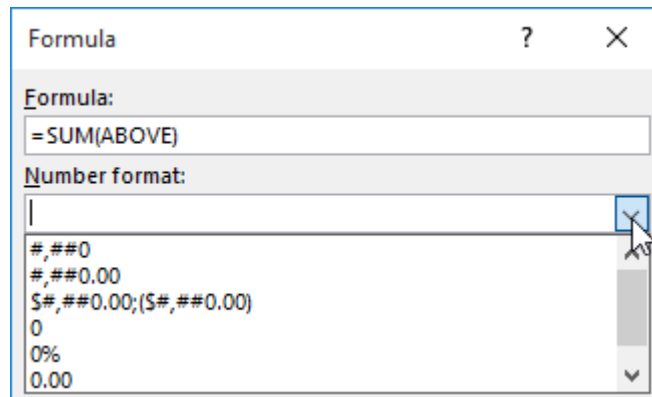
Updating Formula Results

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.

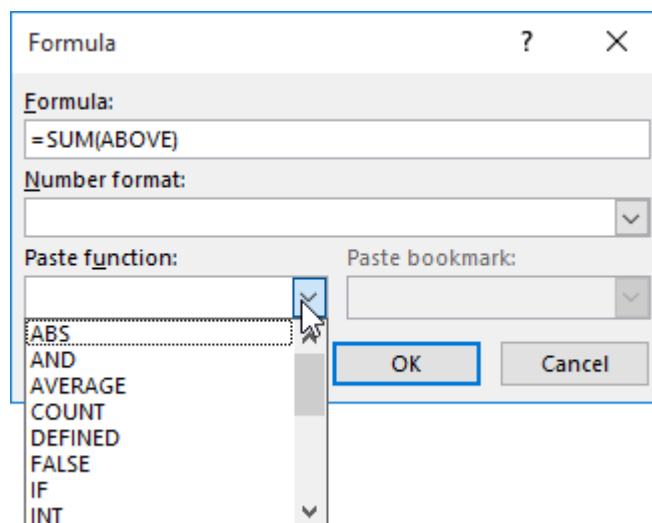
To customize the number format, click the appropriate menu in the Formula dialog and choose the desired option:



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:”



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			

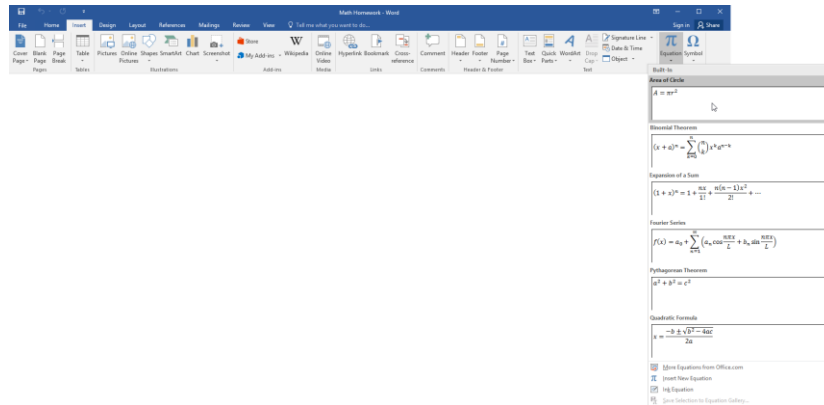
Now, let’s look at what the arguments would be for the numeric values in the Week 1 column.

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

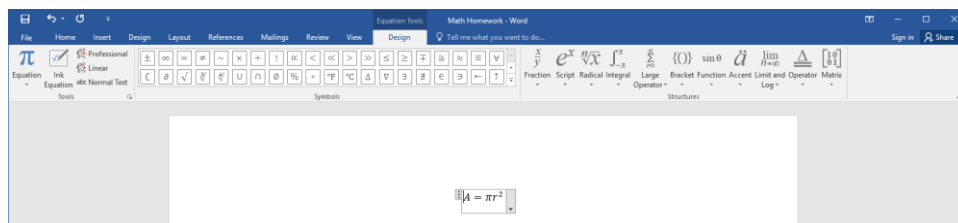
Microsoft Word also allows you to insert equations into your documents. These diagrams allow you to demonstrate complex calculations, but do not provide mathematical functionality.

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

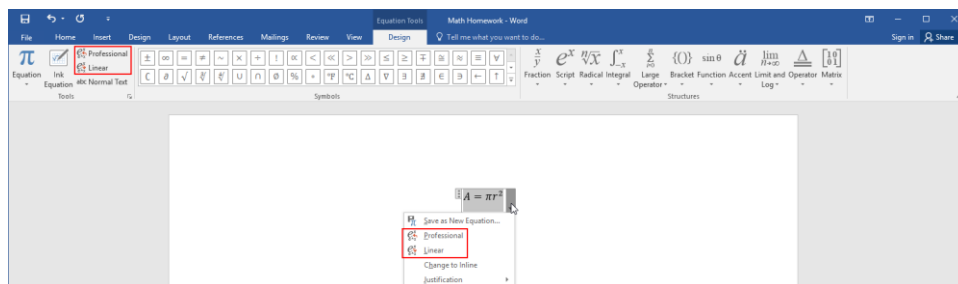


Note the scroll bars to see more equations, and the option to see more equations on Office.com. You can also create your own custom equation.

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:

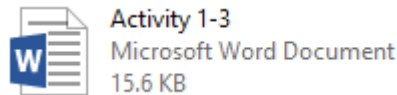


ACTIVITY 1-3

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 → Formula:

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	\$116,295	\$79,586	\$170,378
AVERAGE SALES						
GRAND TOTAL						

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

Formula

Formula:

=AVERAGE(ABOVE)

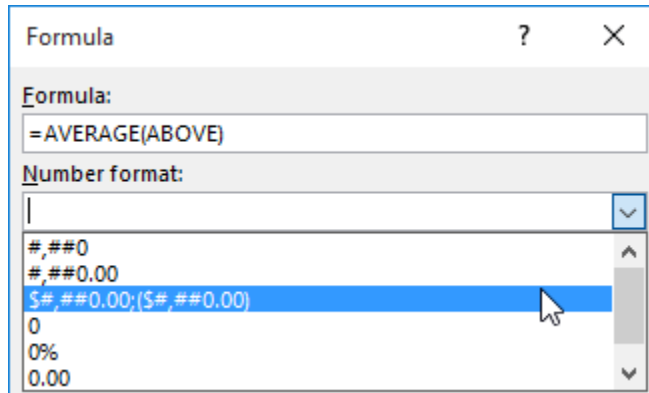
Number format:

Paste function:

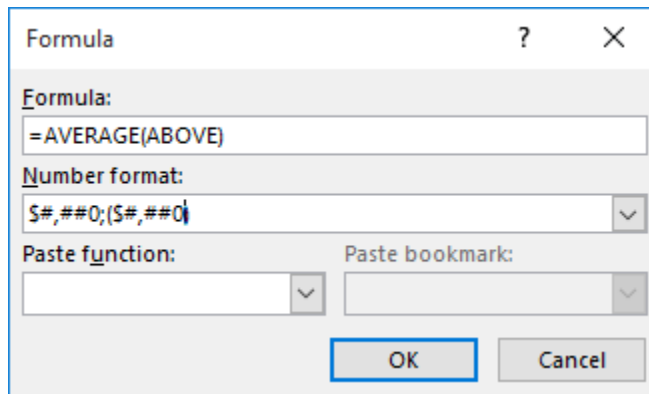
Paste bookmark:

OK Cancel

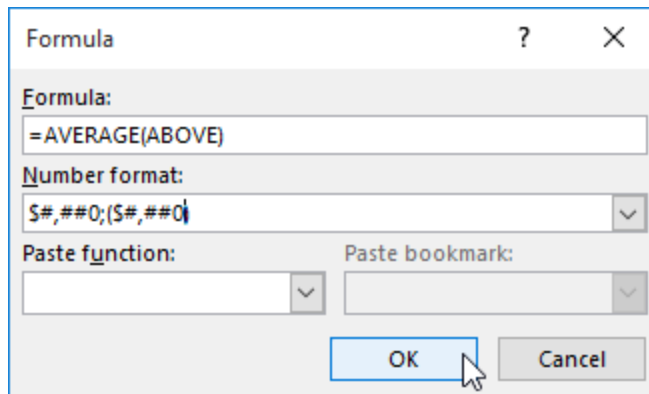
- Click the “Number format” menu and choose the third format in the list:



- Remove the period and two zeros from both sections of the format mask so that it looks like the example shown below:



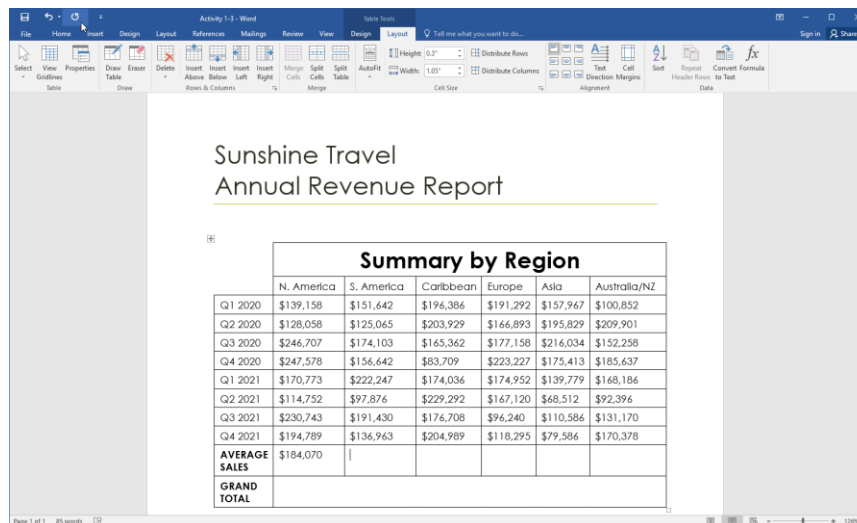
- Click OK:



7. You will see the average for North American sales in the designated 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
AVERAGE SALES	\$184,070					
GRAND TOTAL						

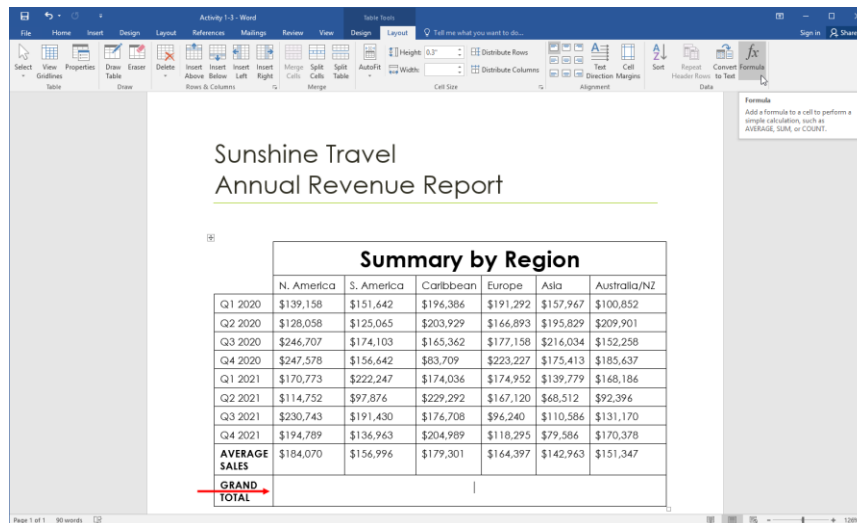
8. Press the right arrow key on your keyboard to move to the next cell in the table. Click the Repeat arrow on the Quick Access toolbar to apply this formula to this cell:



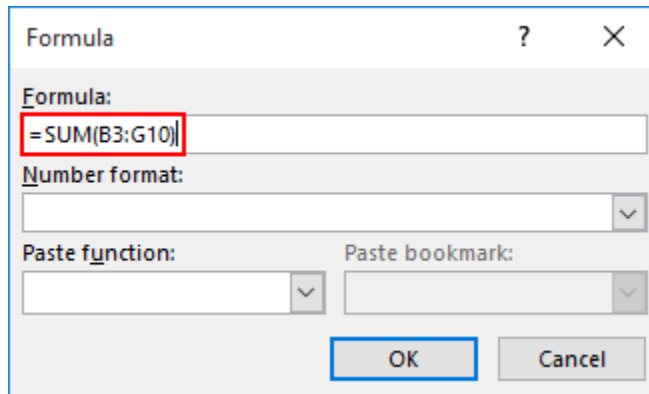
9. You will see the results of the formula in the designated cell. Repeat Step 8 to apply the formula to the remaining cells in the Average Sales row:

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						

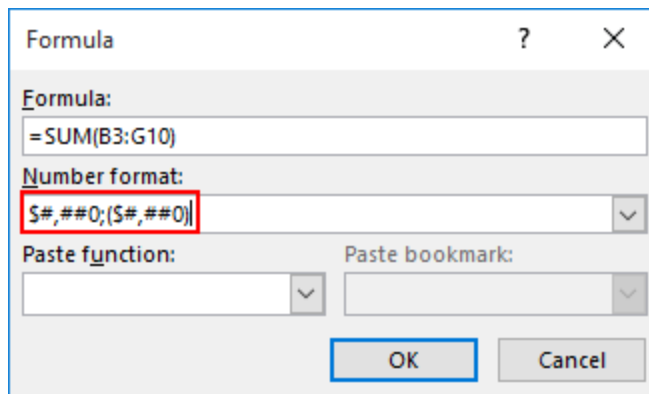
10. Now let’s total up all the sales. Click to place your cursor in the blank row next to “Grand Total.” Click Table Tools – Layout → Formula:



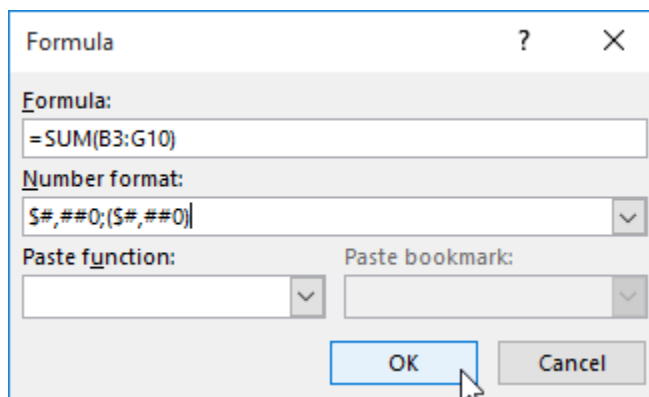
11. We want to sum up all the values in the table except for the Average Sales row that we just created, so replace the "ABOVE" reference text with "B3:G10":



12. Choose the same number format that we used previously, removing the decimal point and the trailing zeroes:



13. Click OK:



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:

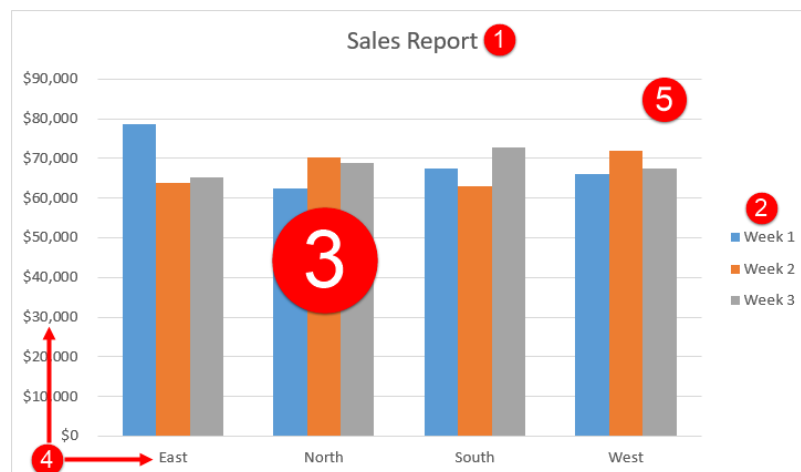
- What a chart is
- What components make up a chart
- About the chart types available in Microsoft Word
- How to create a basic chart
- About the commands on the Chart Tools contextual tab set
- About the Quick Analysis buttons available for charts
- How to change the chart type
- How to edit chart data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

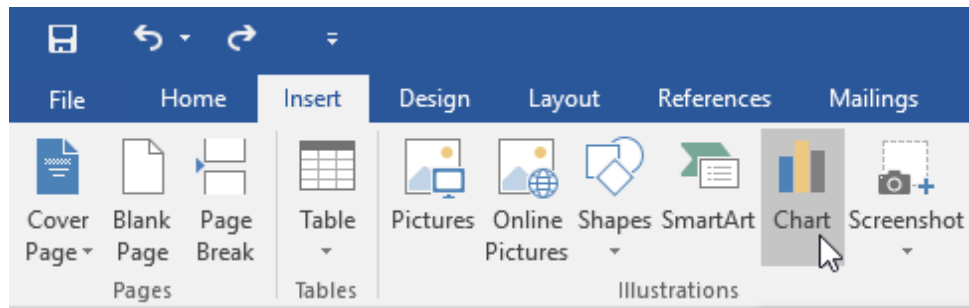
As well, Microsoft Word features a few built-in combinations of the above chart types and the ability to create custom combinations.

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.

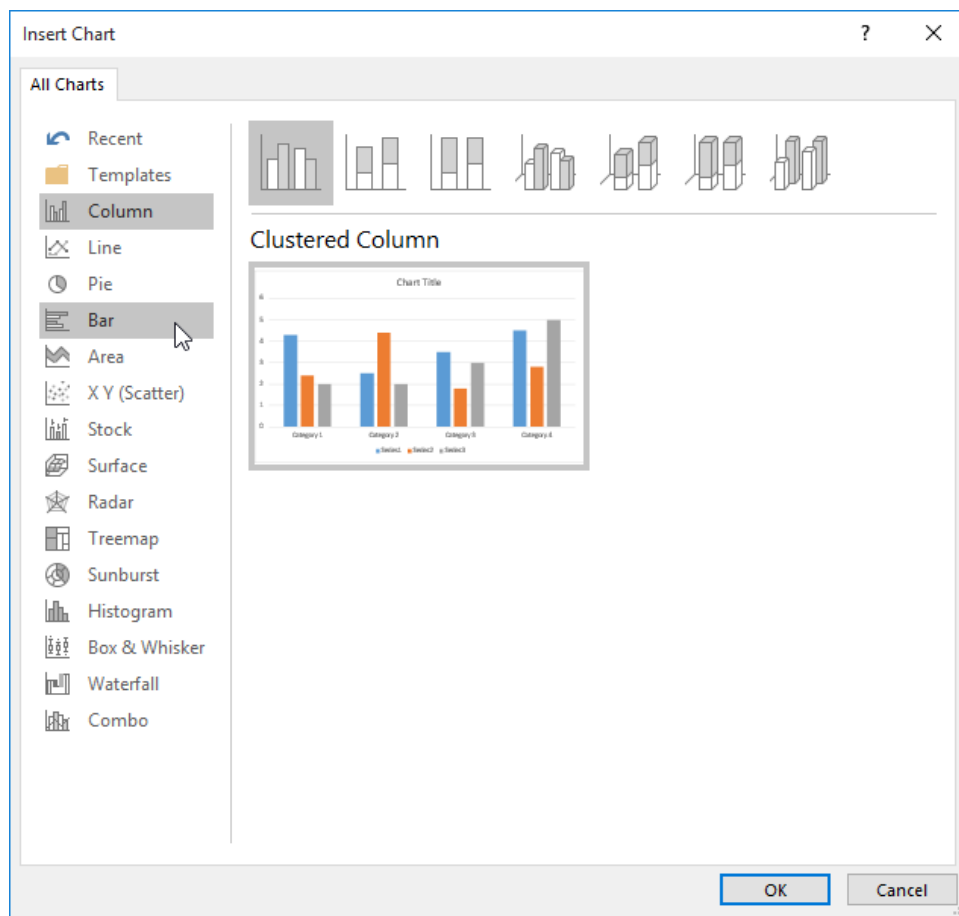
CREATING A CHART

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.

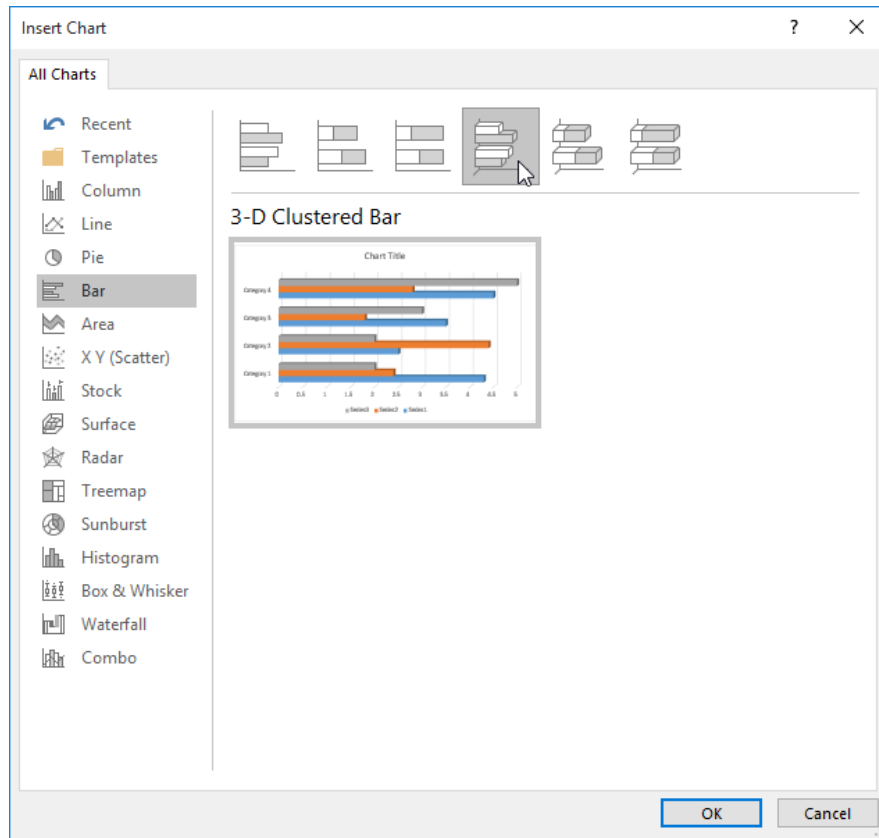
Next, click to place your cursor where you want the chart to go and click Insert → Chart:



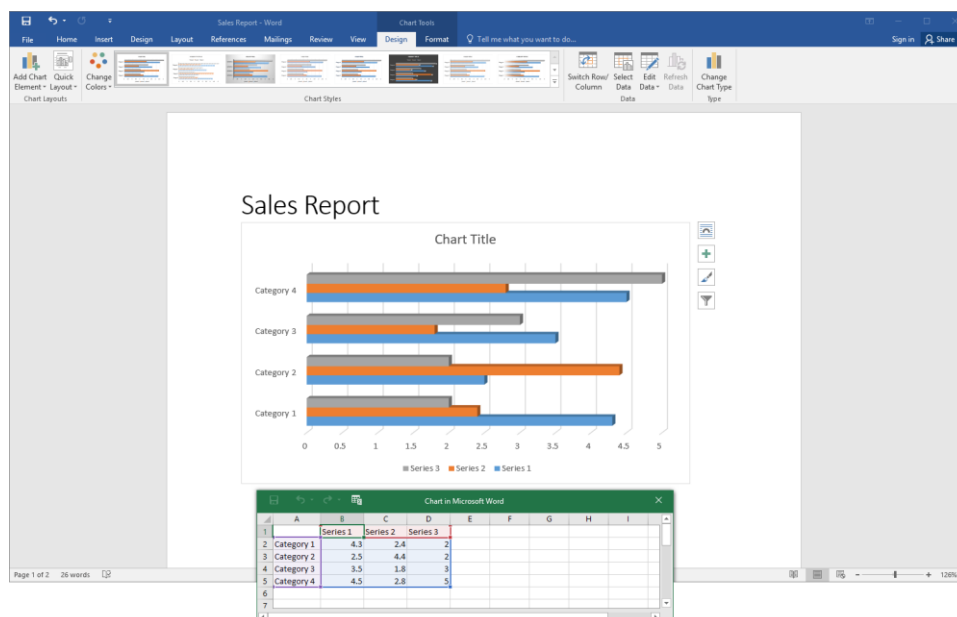
The Insert Chart dialog box will open. Click a chart type from the left-hand side:



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:



When you're ready, click OK to create the chart. You will now see a Microsoft Excel window on top of the Word window:



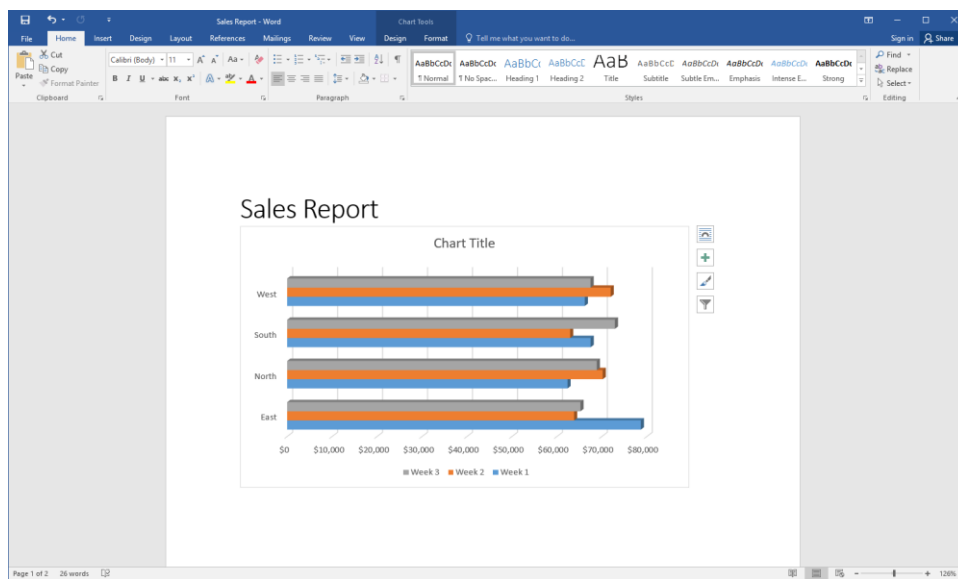
Now, you can paste the data into the Excel sheet or enter it by hand:

	A	B	C	D	E	F	G	H	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									
7									

You can make the source data larger or smaller by clicking and dragging the blue triangle at the bottom of the chart data:

	A	B	C	D	E	F	G	H	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									
7									

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

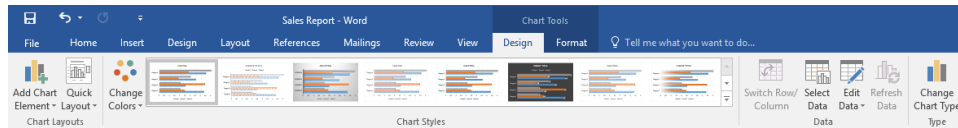


THE CHART TOOLS TABS

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:

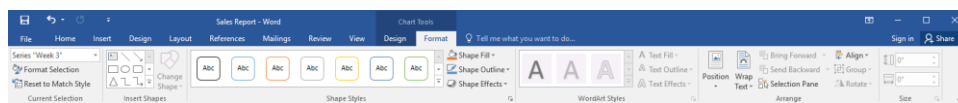


The groups are:

- **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:

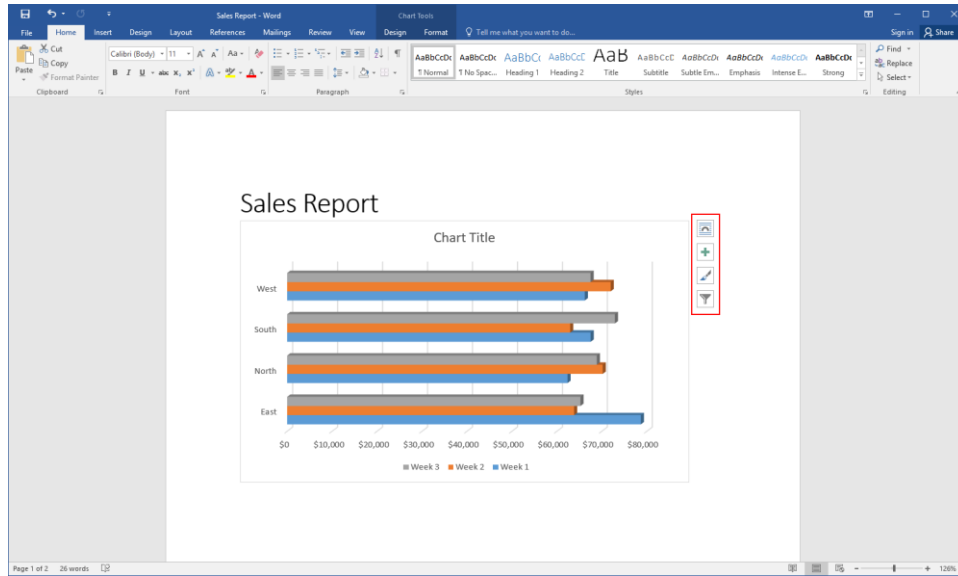


The groups are:

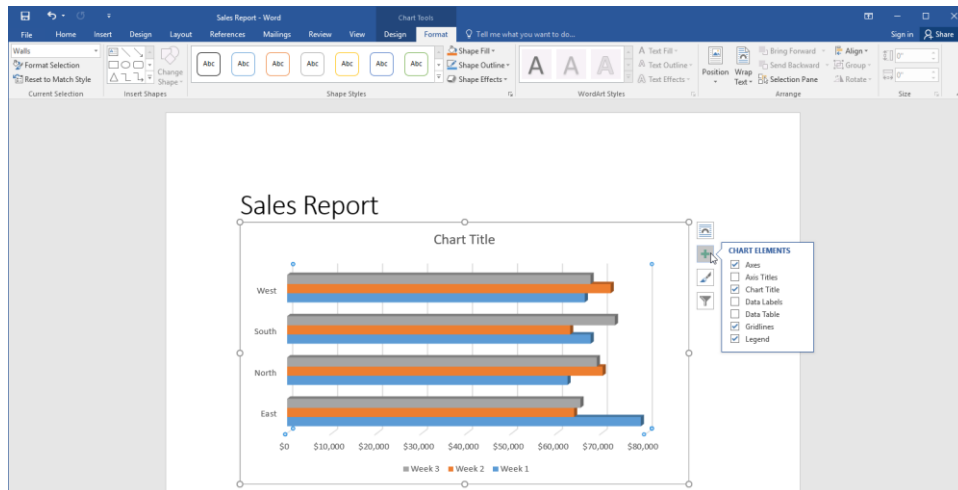
- **Current Selection group:** Choose what part of the chart to format, open the Format dialog for that component, or reset the component.
- **Insert Shapes group:** Add shapes or a text box to your chart.
- **Shape Styles group:** Choose a style for the selected component, or manually format its fill, 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

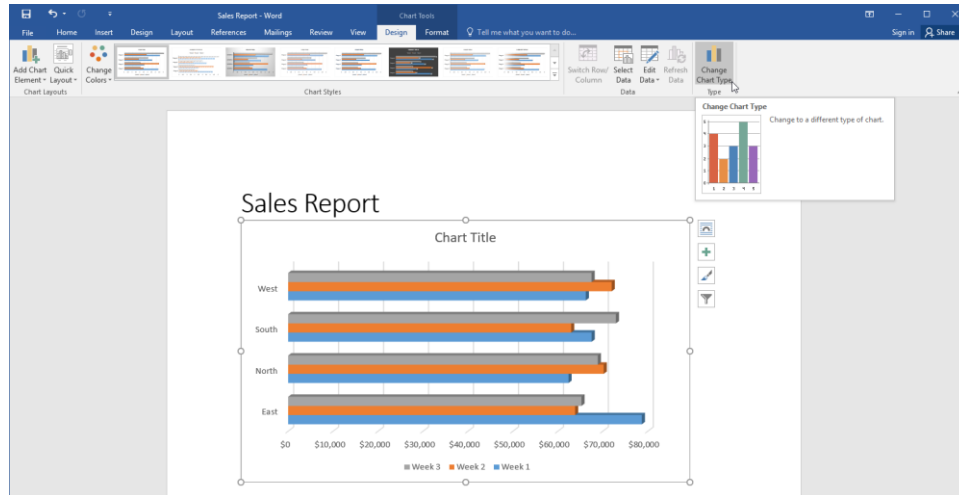


From top to bottom, these buttons will open a mini task pane for Layout Options, Chart Elements, Chart Styles, and Chart Filters:



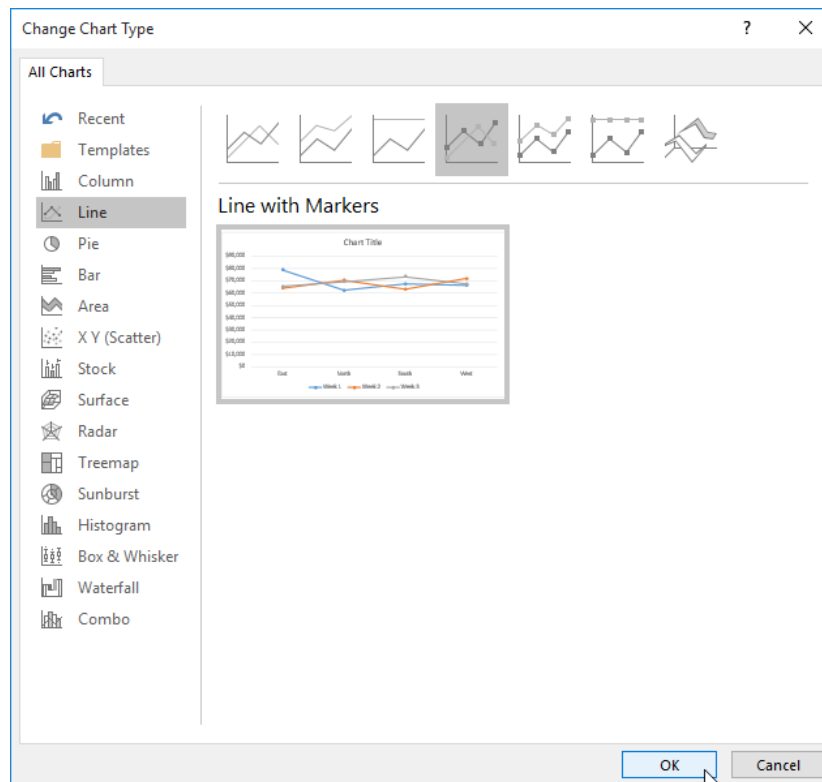
CHANGING THE CHART TYPE

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 → Change Chart Type:

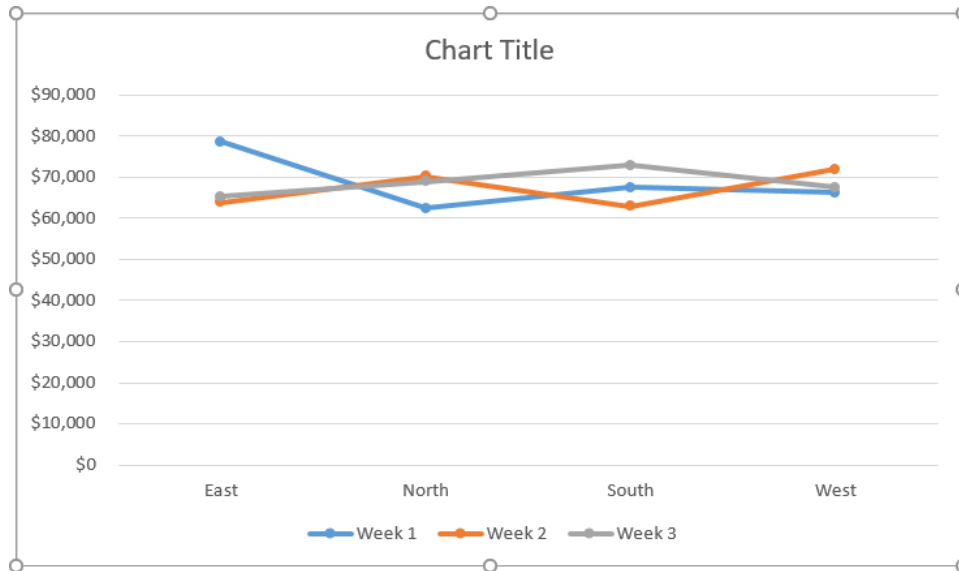


(You can also find this command on the right-click menu.)

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:

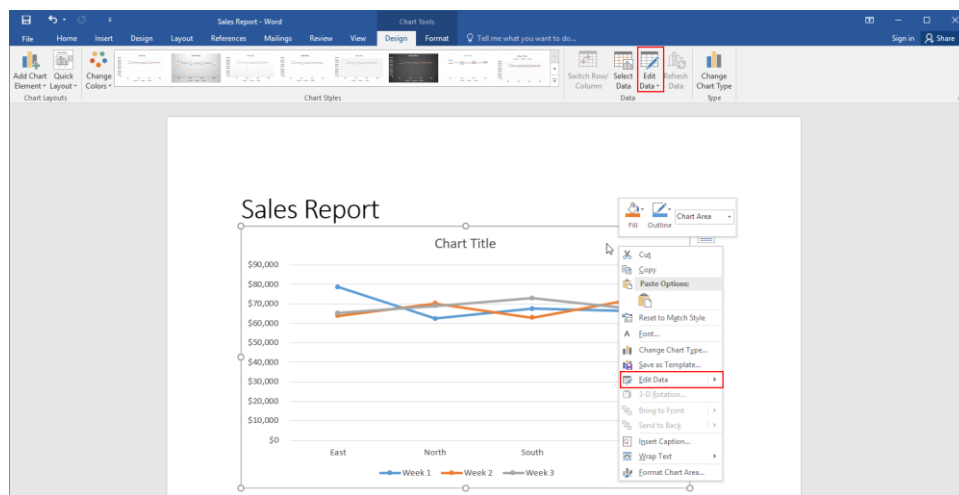


All chart formatting options and data will be shown in the new chart:

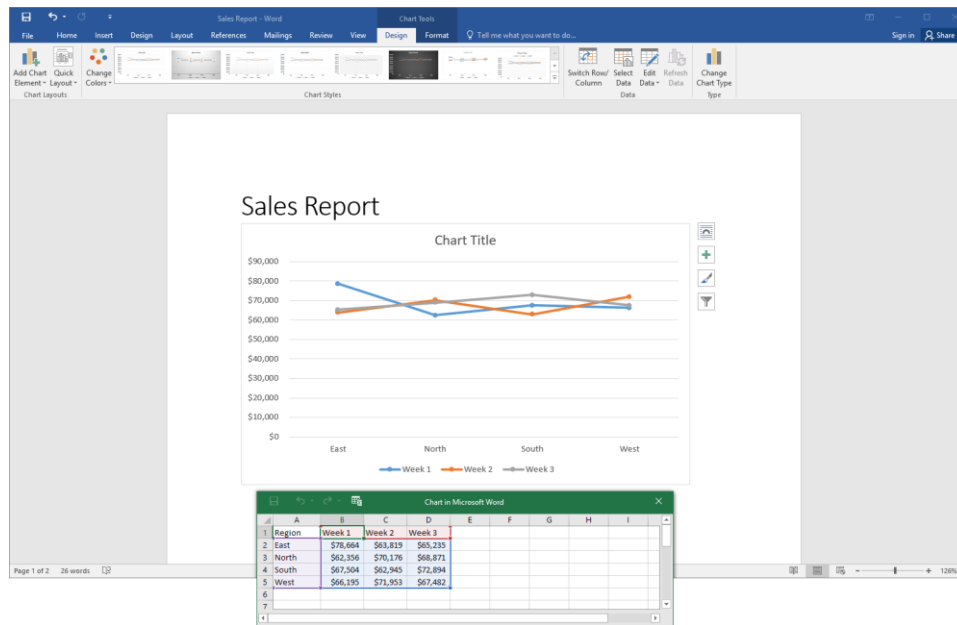


EDITING CHART DATA

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:



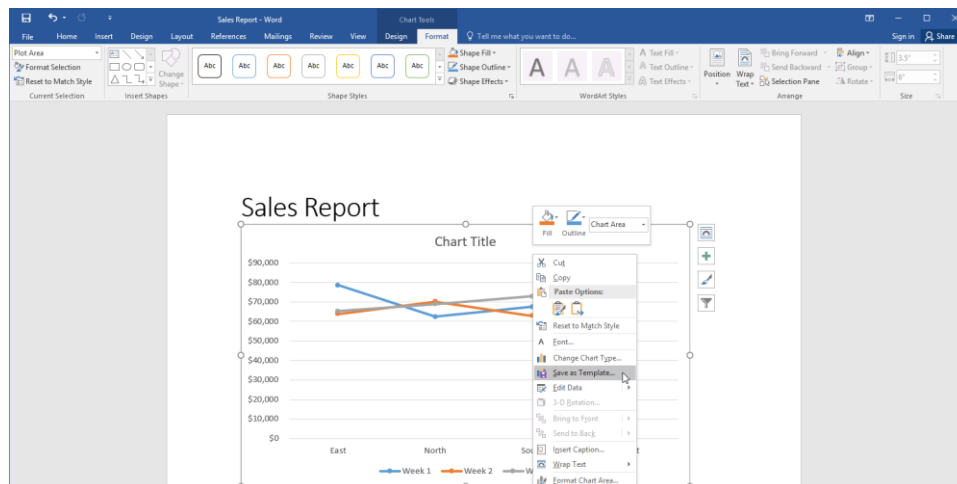
This will re-open the miniature Excel window so that you can edit your data:



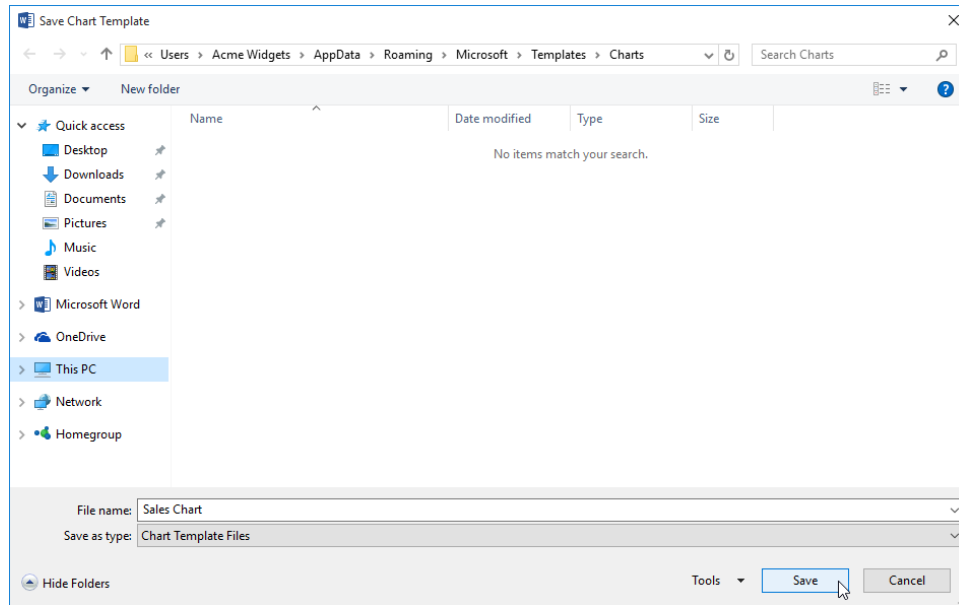
As you make your changes, Word will update the chart. Just close the Excel window when you're done.

SAVING A CHART AS A TEMPLATE

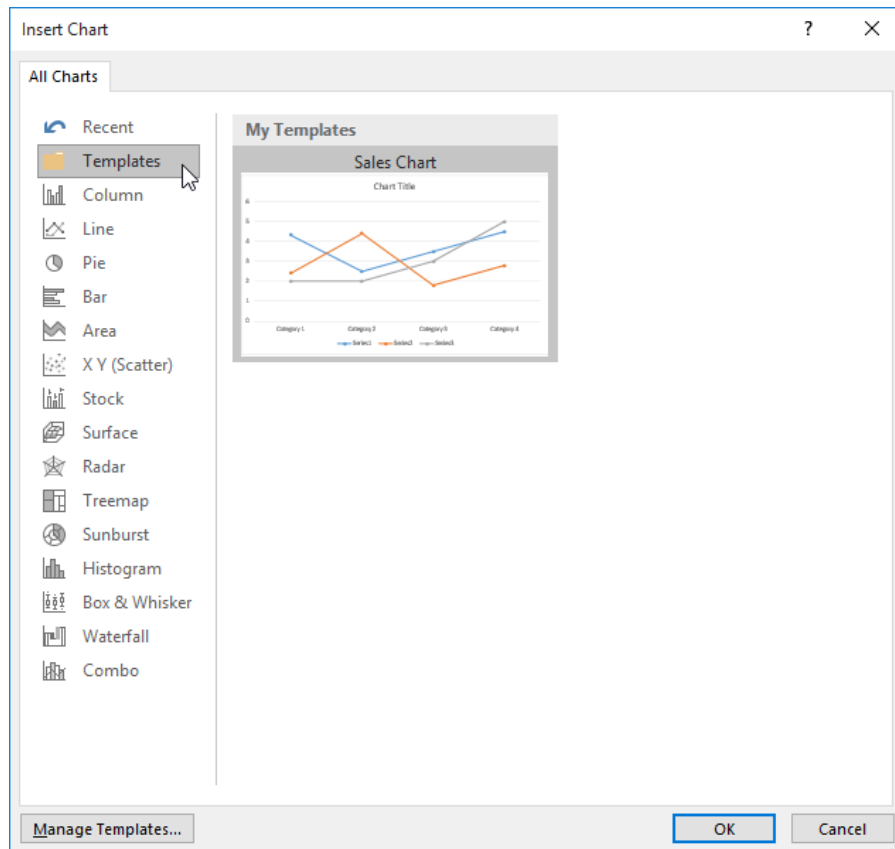
If you have customized a chart and would like to save it for re-use, right-click the chart and click "Save as Template:"



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

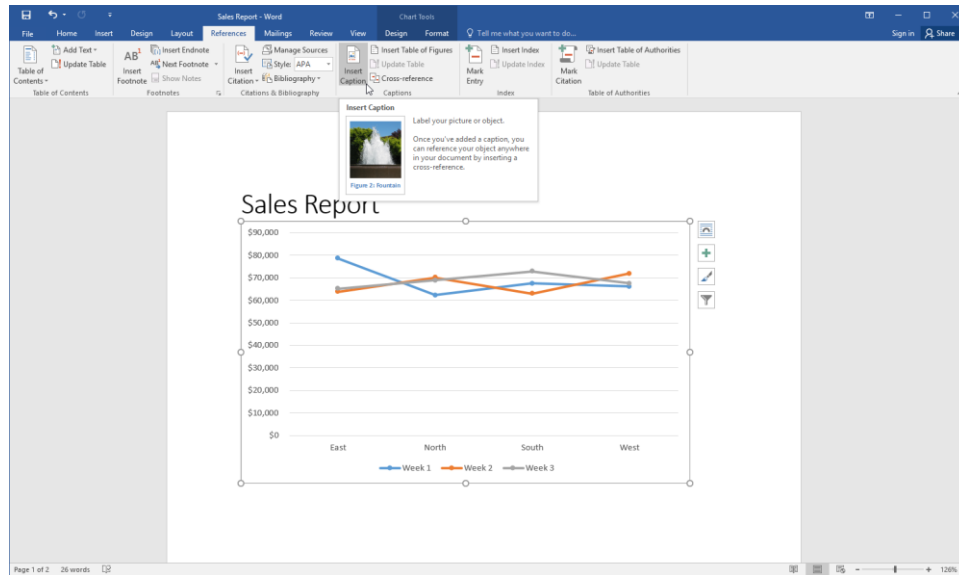


We highly recommend leaving the location set to the default chosen by Word. This way, your new template will be accessible from the Templates category in the Insert Chart and Change Chart Type dialog boxes:

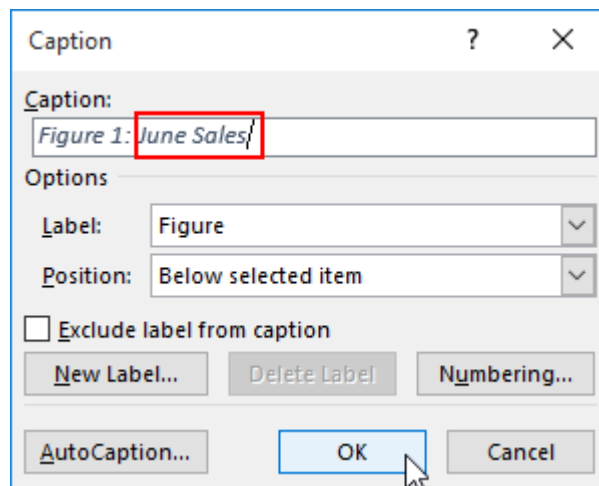


THE CAPTION DIALOG BOX

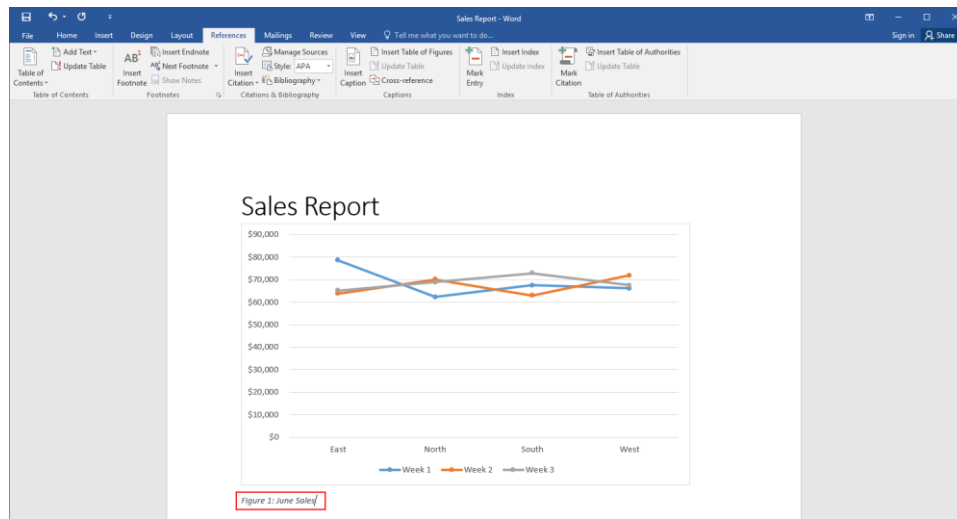
To add a caption to a chart, start by selecting it. Then, click References → Insert Caption:



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



The caption will then appear with the chart:



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.

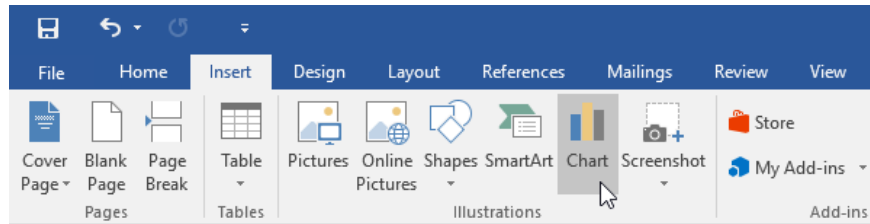
1. Open Microsoft Word 2016 and open Activity 1-4:



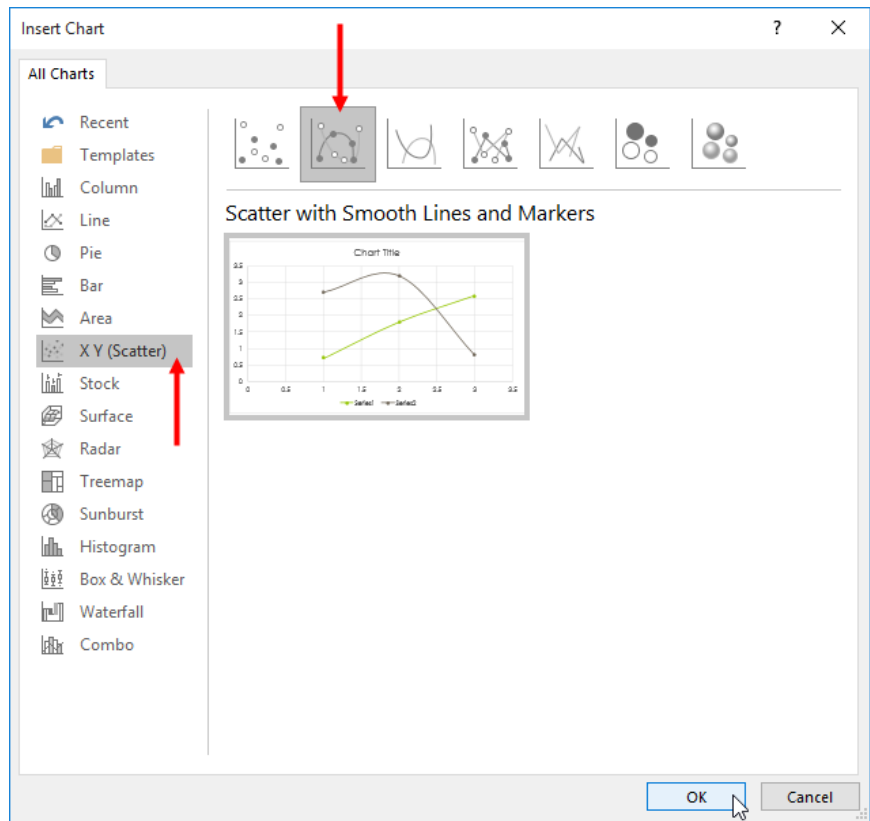
2. To begin, select all rows in the table except the first. Right-click the selection and click Copy:

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

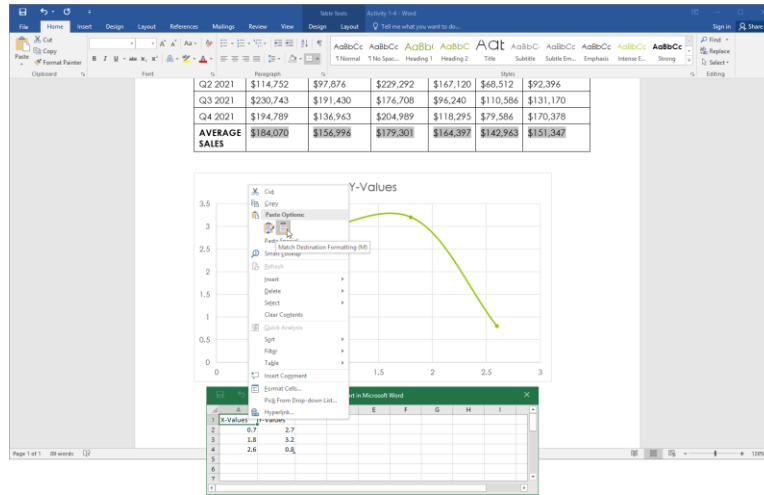
3. Click to place your cursor at the bottom of the document. Click Insert → Chart:



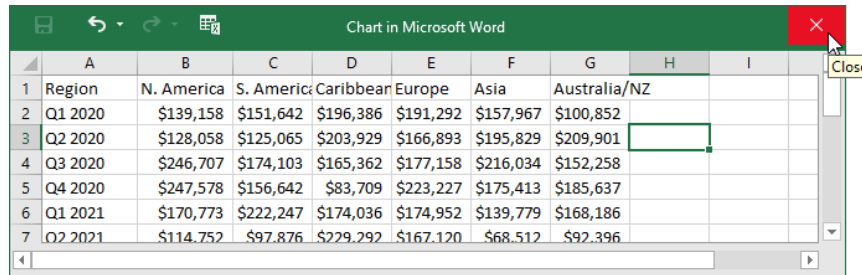
4. Click the XY (Scatter) category on the left-hand side. Click the second type and click OK:



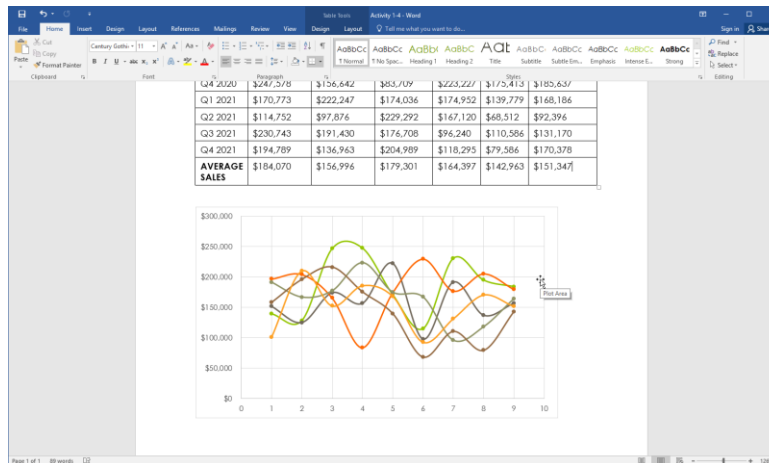
5. A small Microsoft Excel window will open. Right-click in cell A1 and click Paste (Match Destination Formatting):



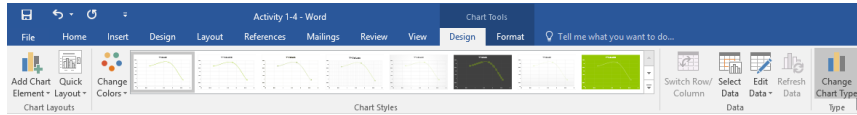
6. Close the Excel window:



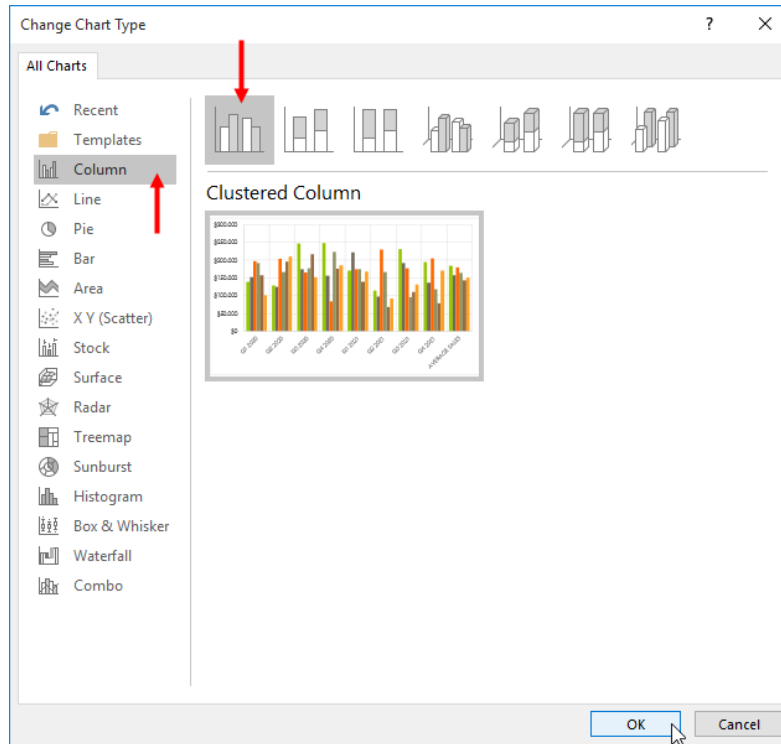
7. You will see your chart in the Microsoft Word window. However, you can also see that this particular chart type is not very useful for displaying our data. Let's try changing the chart type. Click the chart to select it and display the Chart Tools tabs:



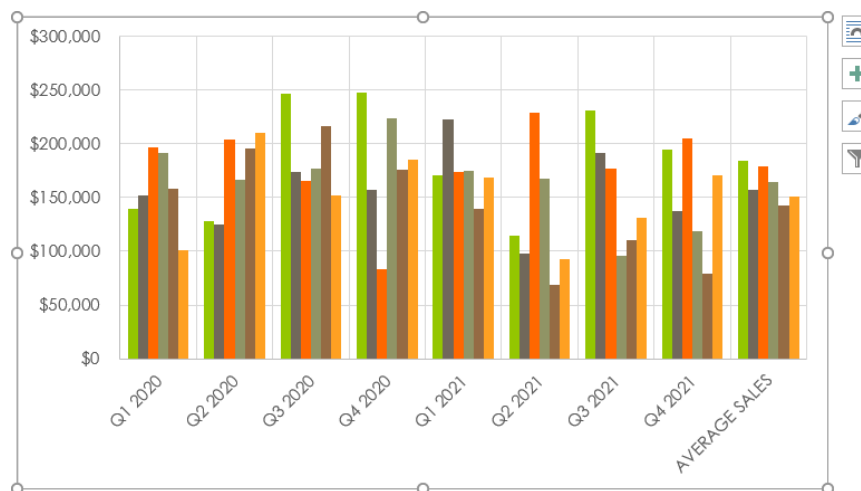
- Click Chart Tools – Design → Change Chart Type:



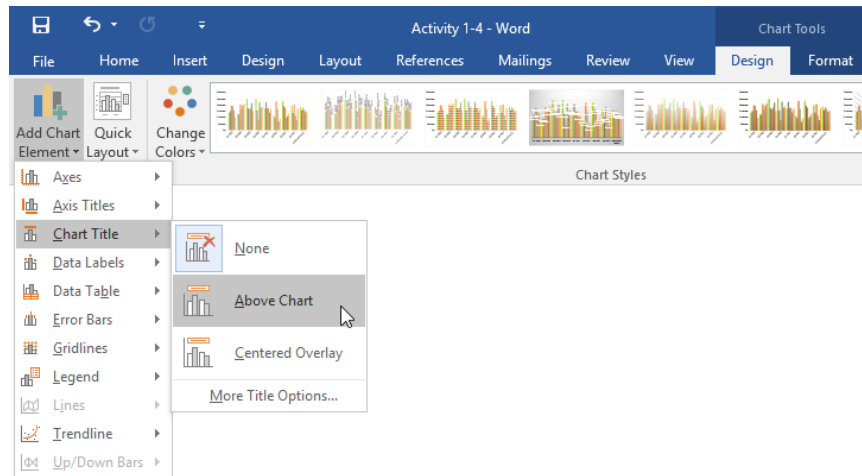
- The Change Chart type dialog box will open. Click the Column category. The first type should be selected automatically. Click OK:



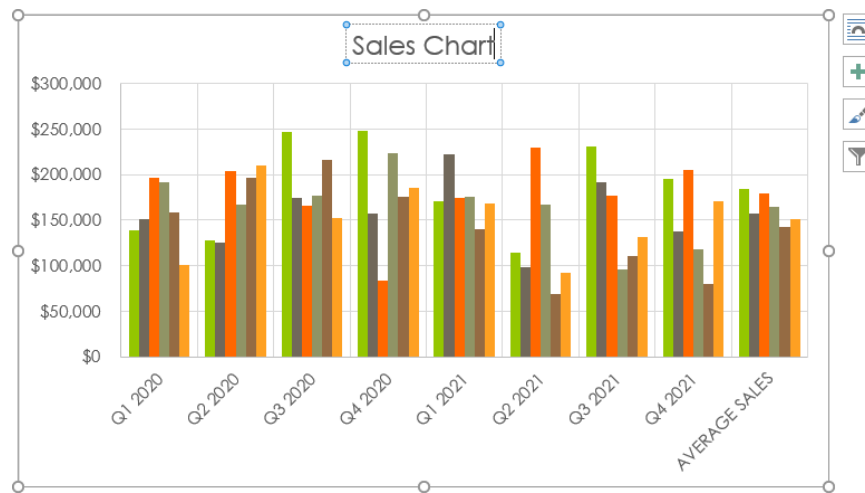
- The new chart type will be applied:



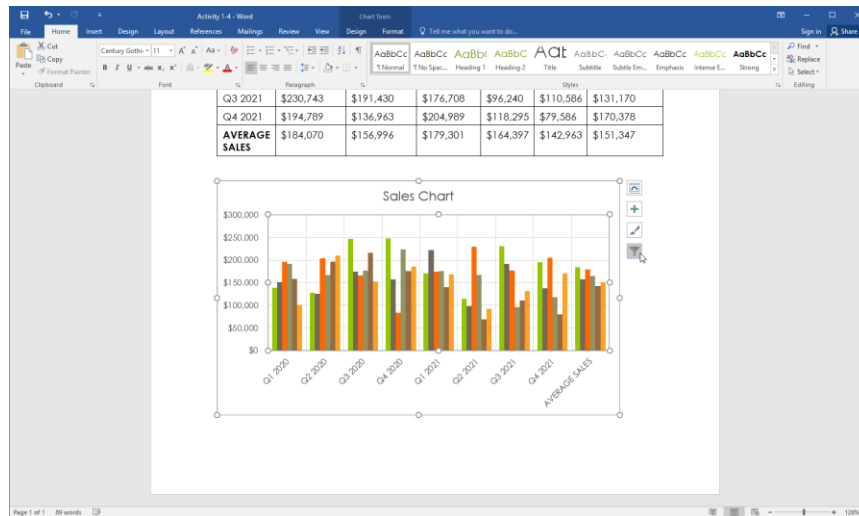
11. Now let's add a title. Click Chart Tools – Design → Add Chart Element → Chart Title → Above Chart:



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

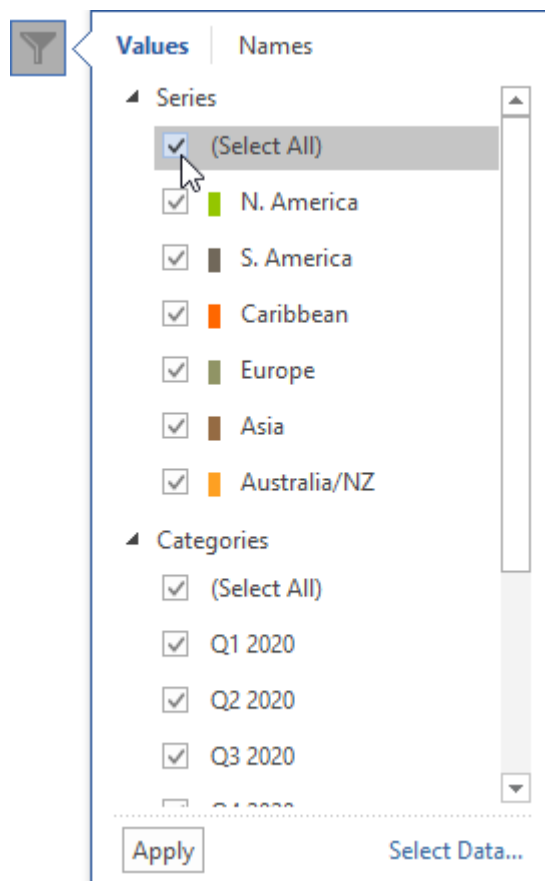


13. Finally, let's filter out some of the chart data. Click the Chart Filters Quick Analysis button next to the chart:

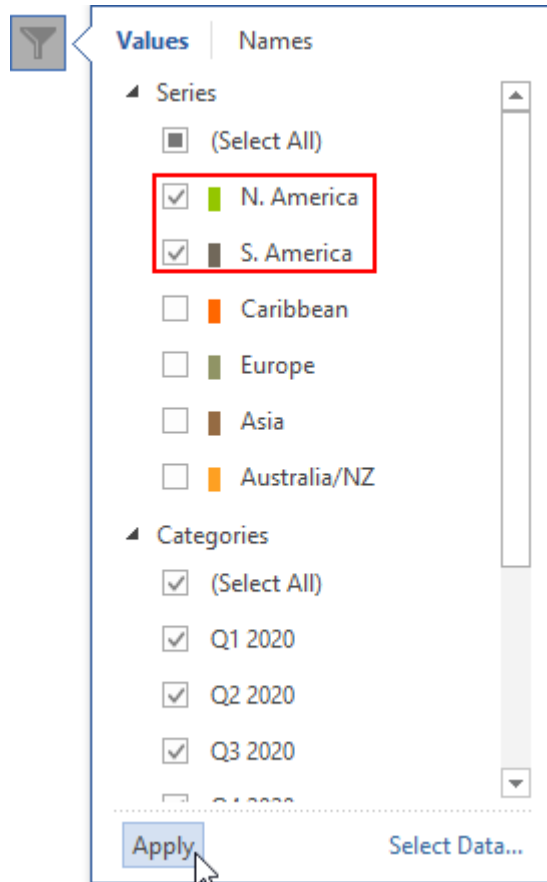


(If you do not see this button, click off of the chart and re-select it.)

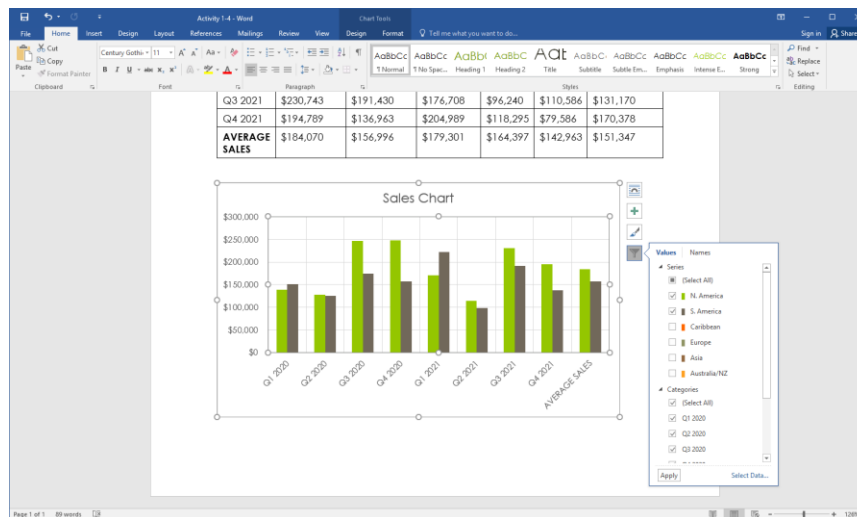
14. In the task pane that opens, uncheck the "Select All" box:



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



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



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.

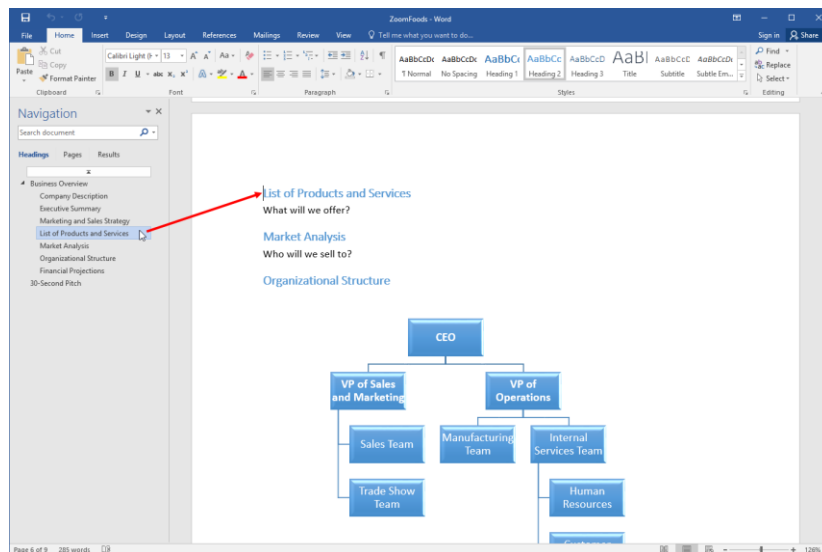
Style Types

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

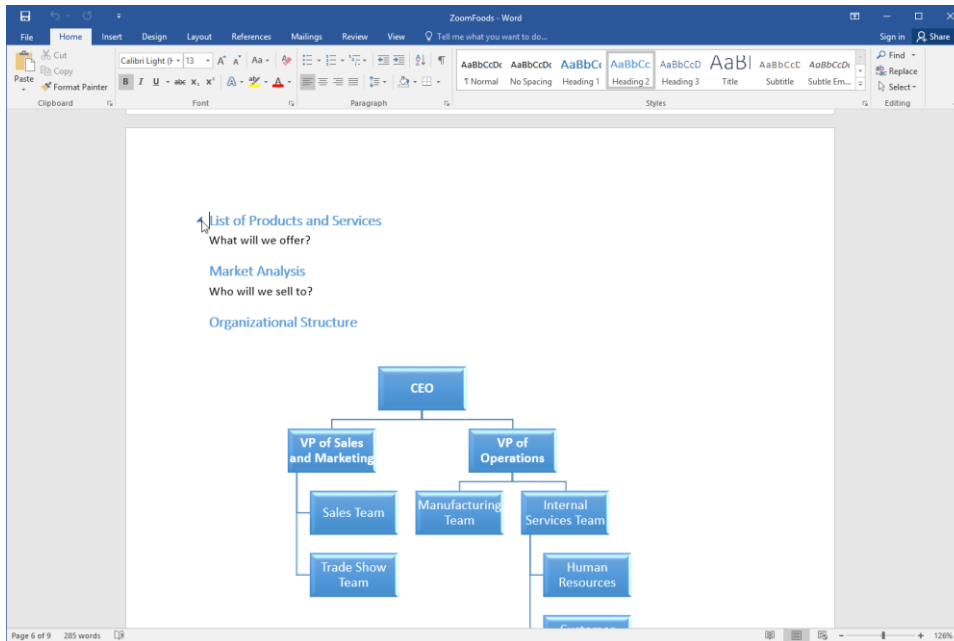
Style Type	Description	Example Style
Character	These styles can be applied to individual characters. Attributes can include font face, size, color, and effects.	Strong a
Paragraph	These styles must be applied to entire paragraphs. Attributes can include spacing, borders, and alignment.	<i>Caption</i> ¶
Linked Paragraph and Character	Contains both a paragraph style and a character style that are linked.	Heading 1 ¶a
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:

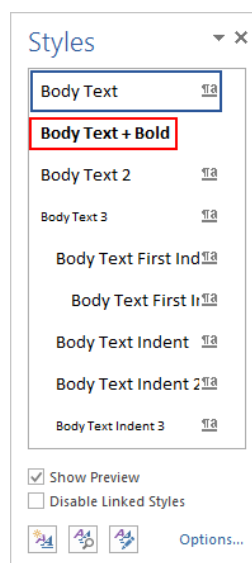


Body and Heading Styles

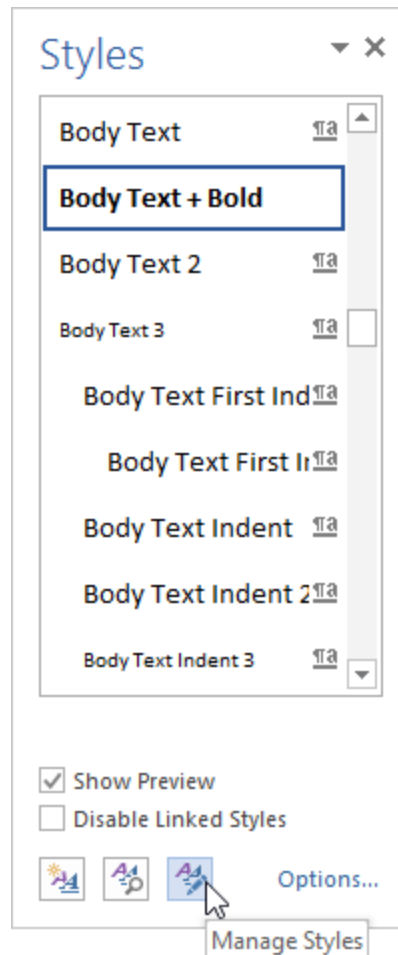
The appearance of the styles available in each document are controlled by the document's theme and style set, which will be discussed in Topic C. Each theme contains a heading and body font, which act as the top-level setting for those styles of that type.

+Styles

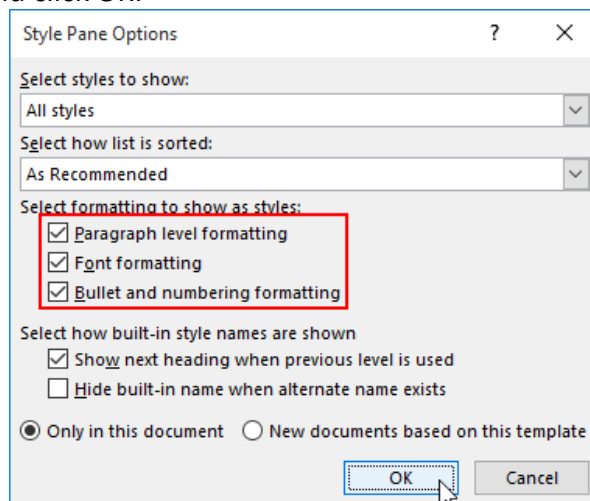
If you add your own formatting to text, it can be shown in the Styles pane as its own ad-hoc style:



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



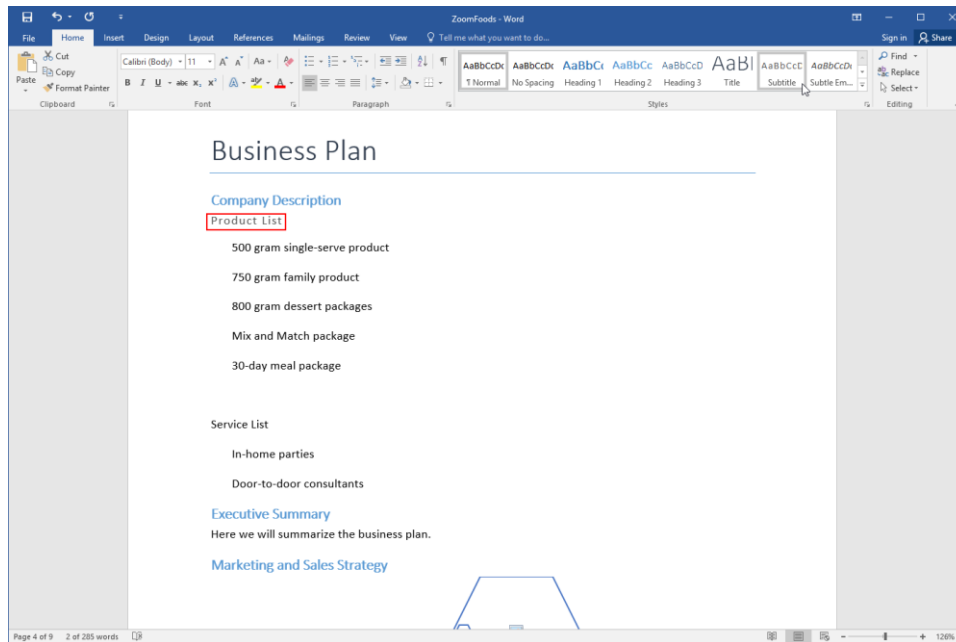
The Style Pane Options dialog box will open. Check all three options in the “Select formatting to show as styles” section and click OK:



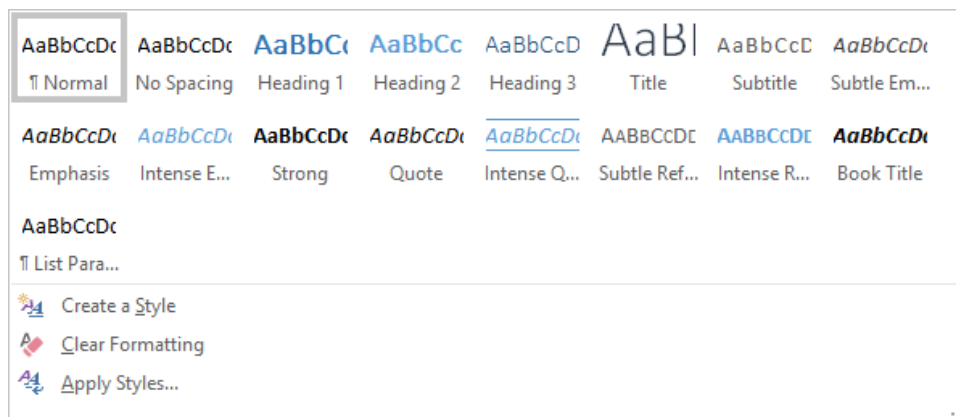
These options can be disabled at any time.

APPLYING STYLES

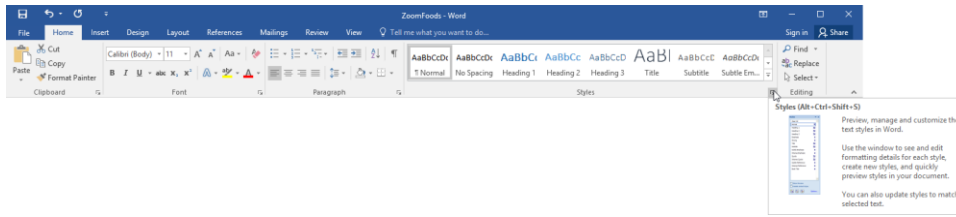
To apply a style, select the text that you want to format and then click the appropriate style from the Styles gallery on the Home tab:



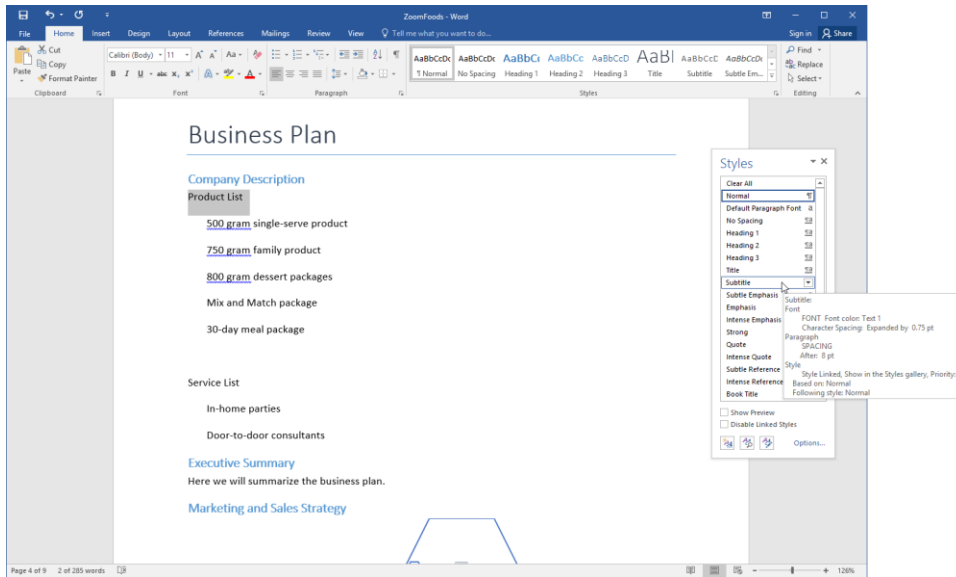
If you don't see a style that you like, click the up and down arrows at the right of the gallery to scroll through the available styles. Alternatively, you may see all styles at once by clicking the More arrow (⌵) below the arrow buttons:



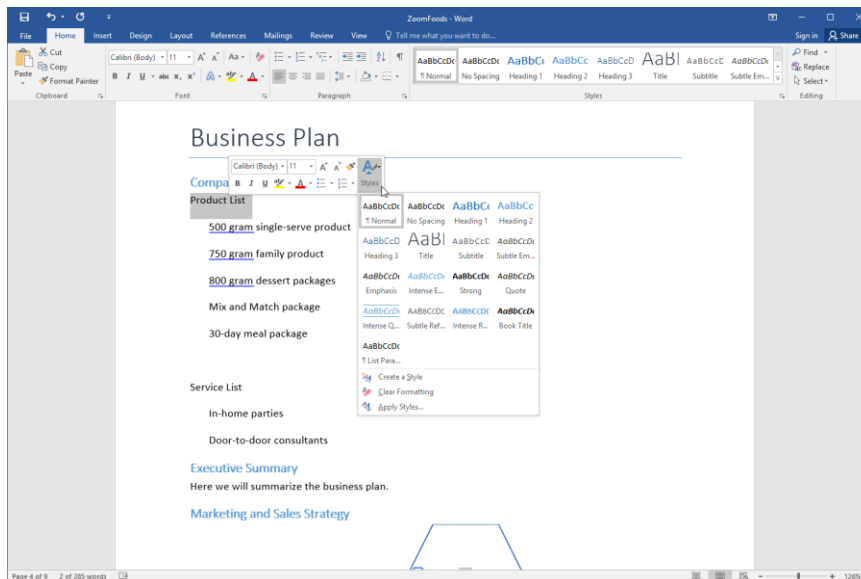
As you move your cursor over each style, you will see a preview of it on the page (as long as your cursor is placed within text). You can click any style to apply it. You can also use the Styles task pane to apply styles. To start, click the option button in the Styles group on the Home tab:



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:

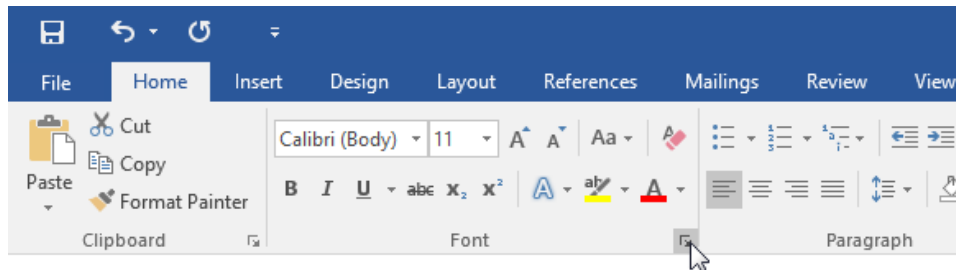


There is also a Styles gallery available on the mini toolbar:

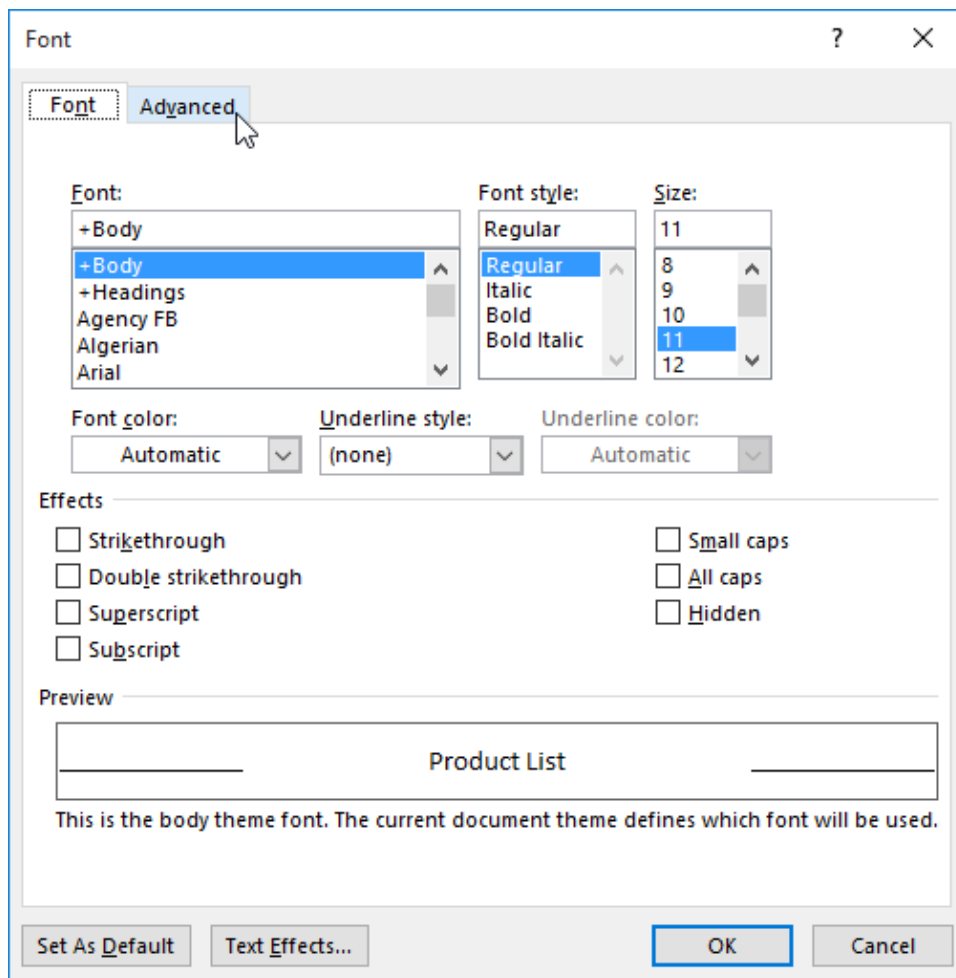


CHARACTER SPACING

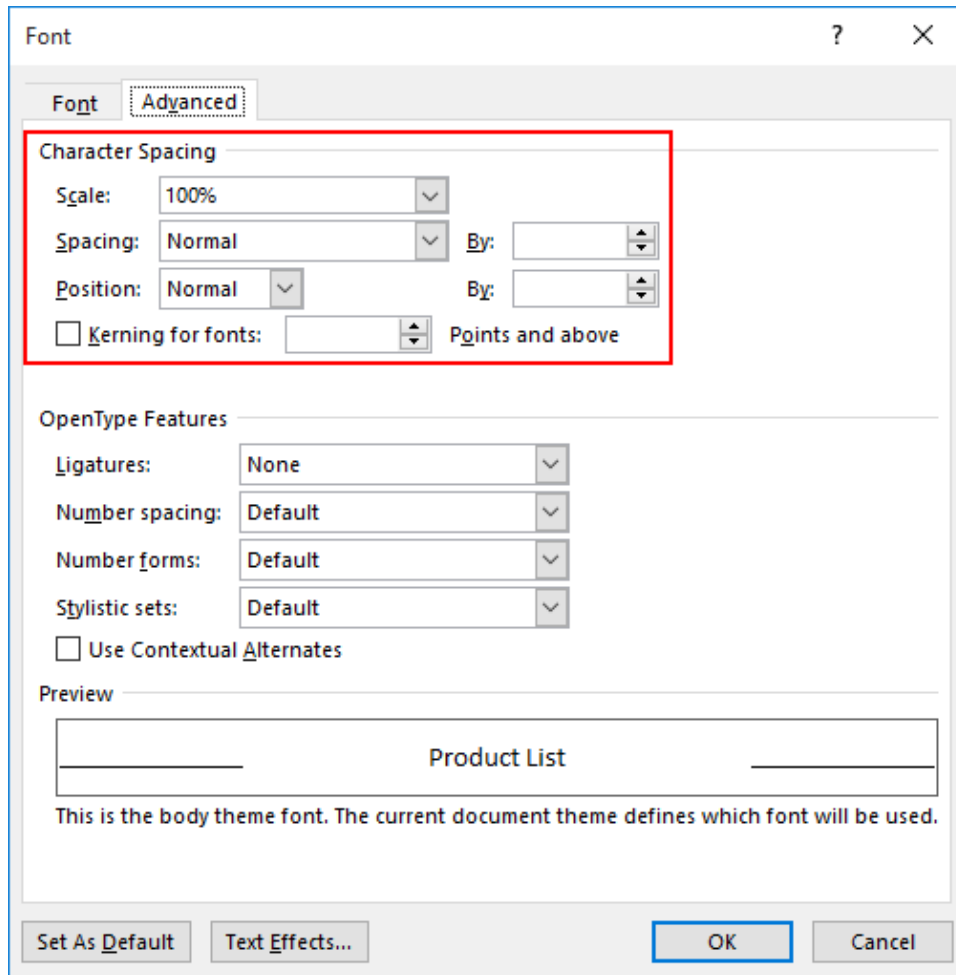
Another element of text customization is the spacing and kerning of characters. To view these options, select the text that you want to modify. Then, click the option button in the Font group of the Home tab or press Ctrl + D:



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



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



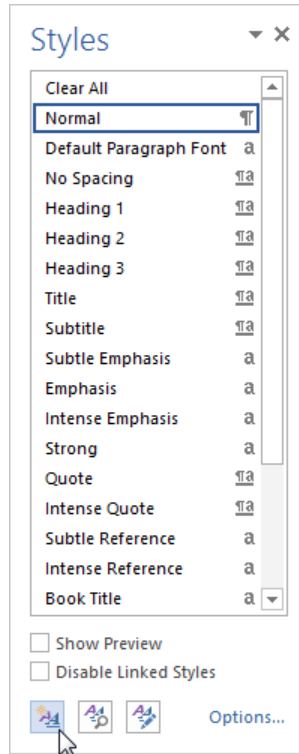
The first option in this section is **Scale**. You can use a regular size font, but select a percentage so the font is scaled up or down.

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.

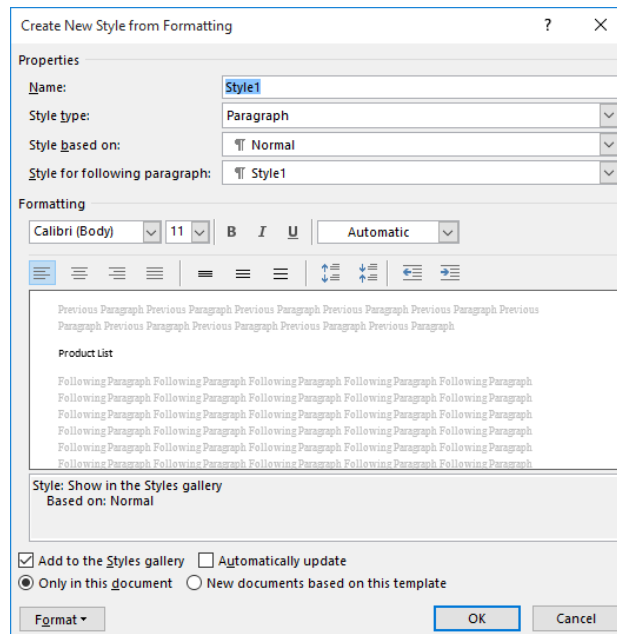
The last check box enables **Kerning**, which adjusts the spacing between letters so that it looks consistent. If you enable kerning, you can also specify what sizes you want Word to kern (from a certain point on).

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:



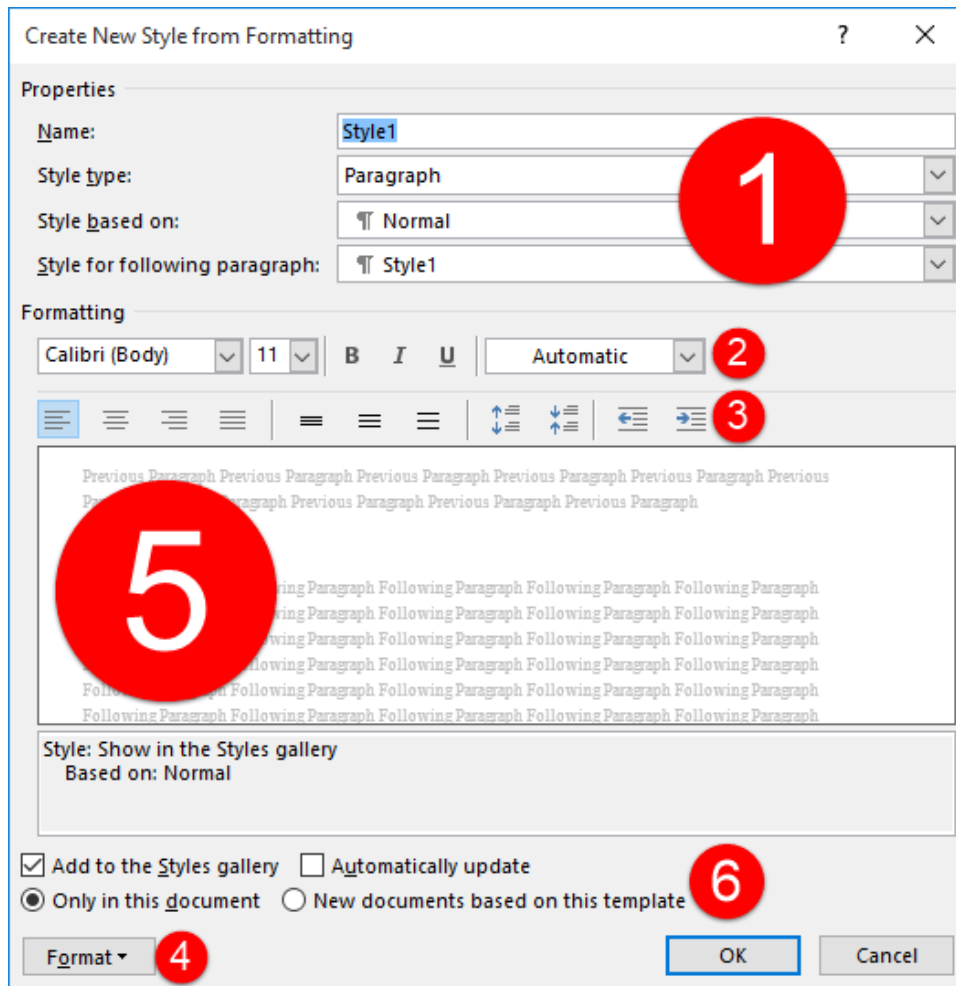
You will then see the Create New Style from Formatting dialog:



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:



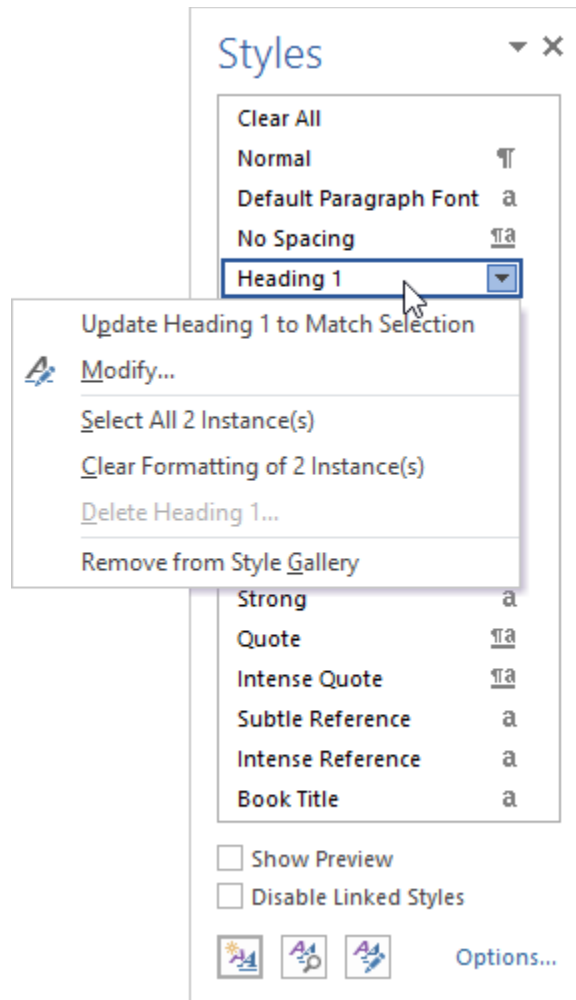
At the **top of the dialog (1)**, you can enter a name and choose a type for the style (character, paragraph, linked, etc.). You can also choose the style that it is based on and the style for the following paragraph.

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.

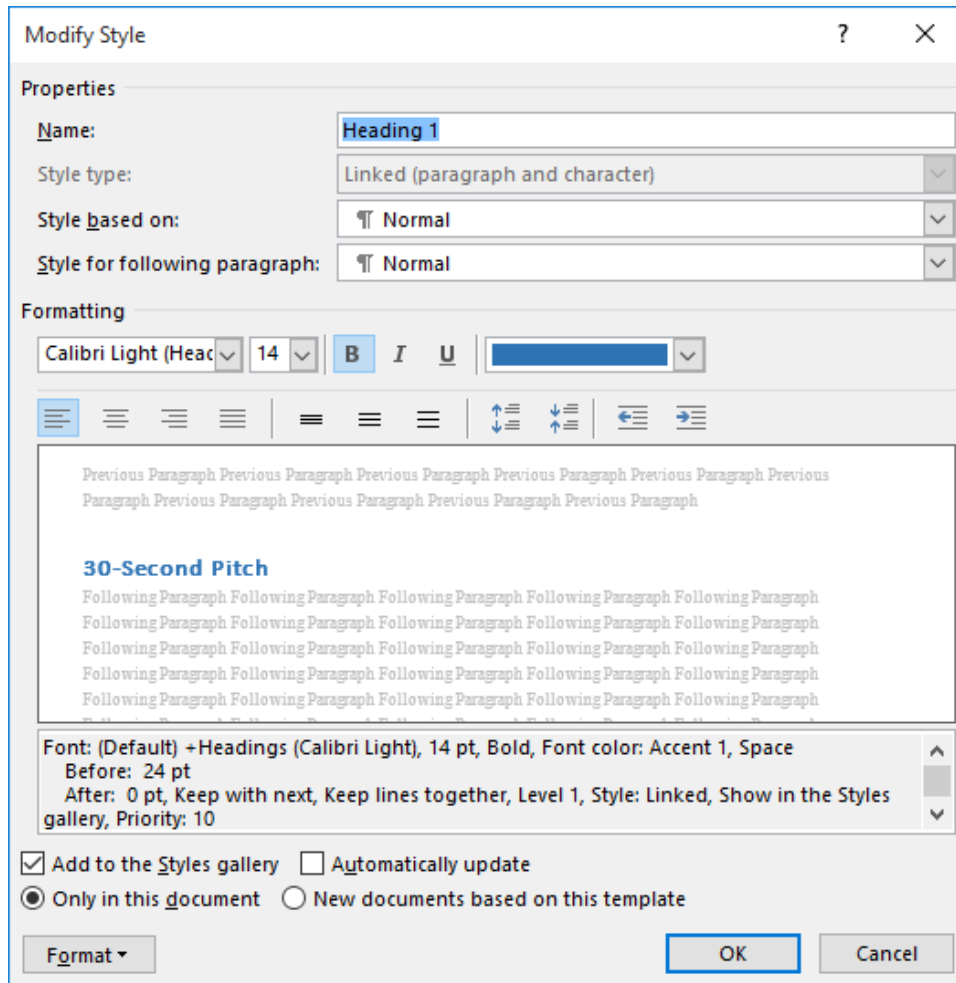
STYLE MODIFICATION OPTIONS

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



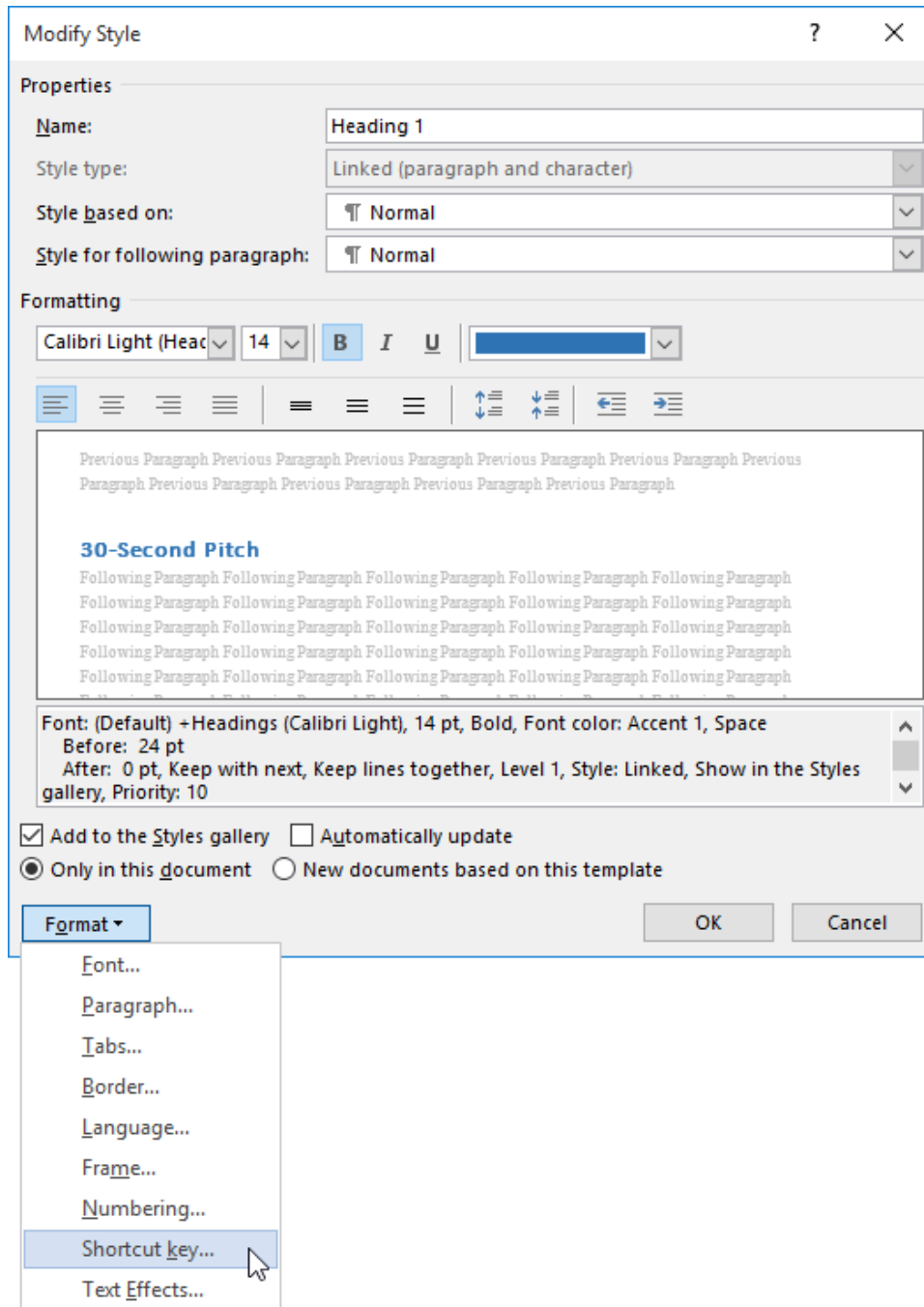
These options are fairly self-explanatory, allowing you to modify, select, and delete the style in question. Note that built-in styles cannot be deleted.

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:

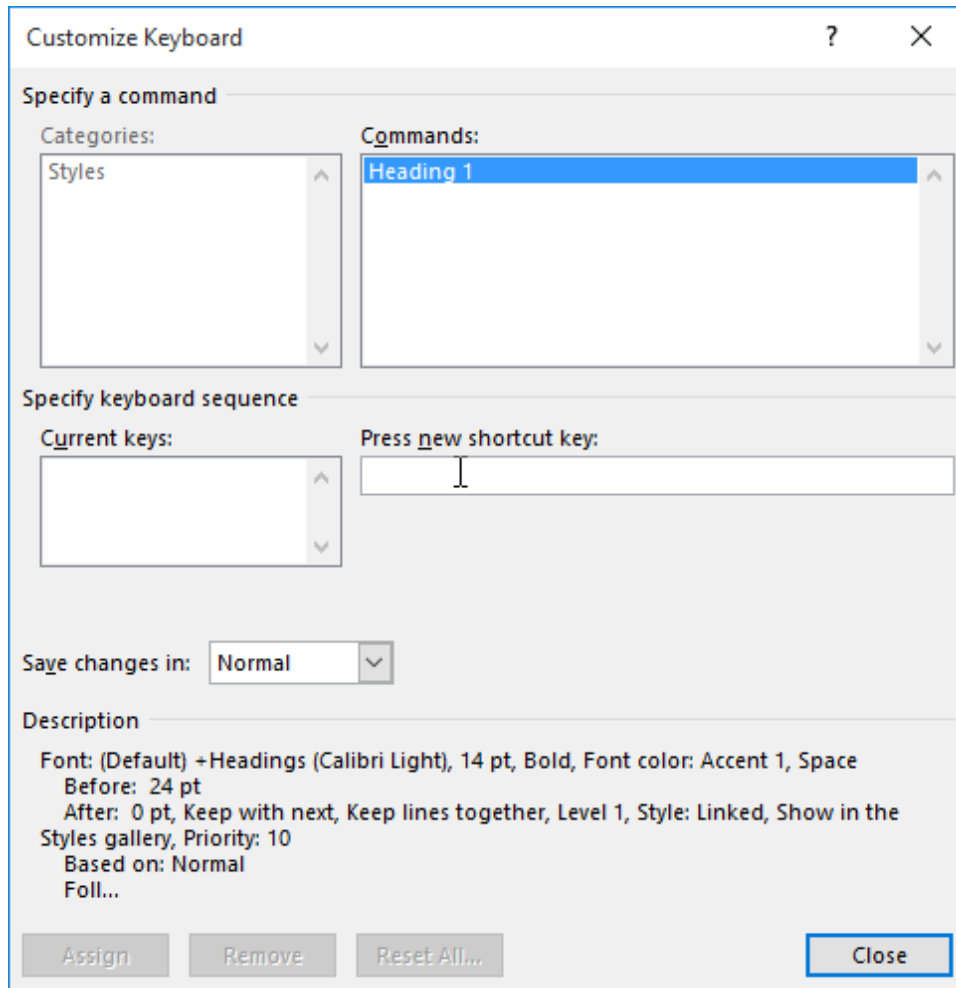


ASSIGNING KEYBOARD SHORTCUTS TO STYLES

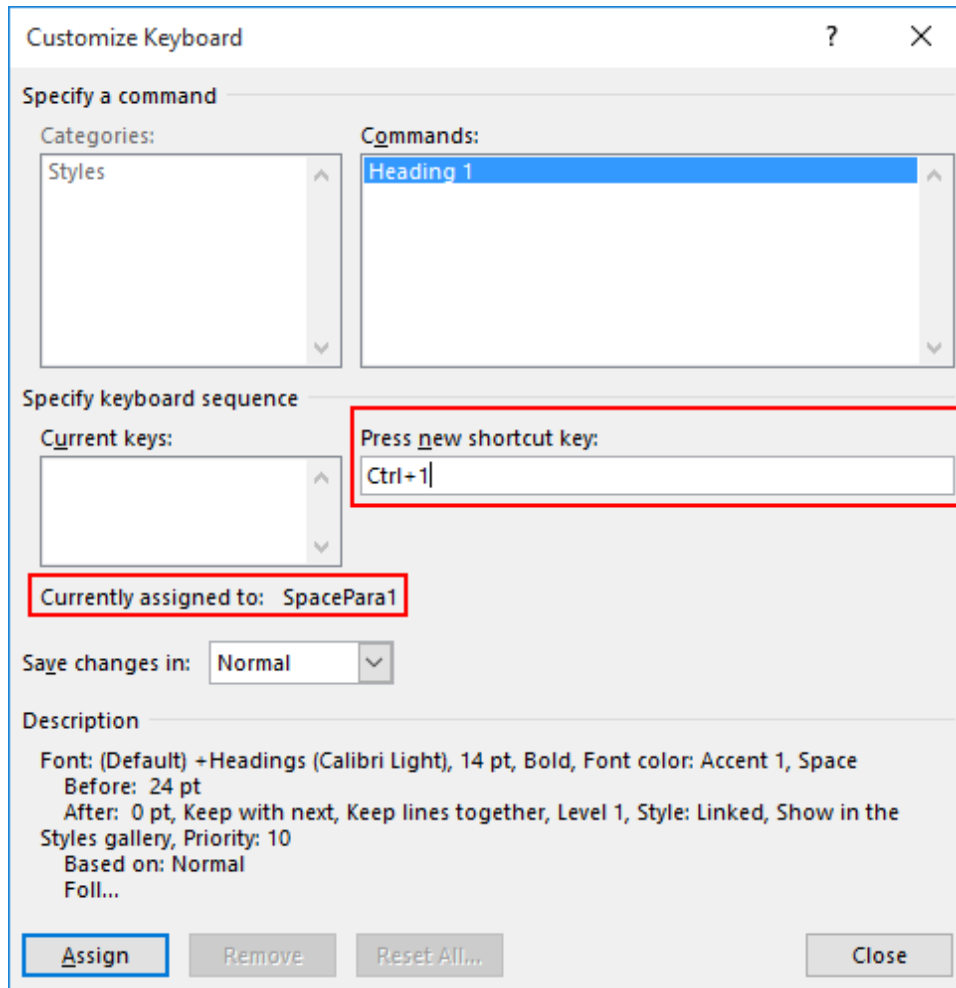
You can assign a keyboard shortcut to a style when creating or modifying it. To begin, click the Format button and click “Shortcut key:”



The Customize Keyboard dialog box will open, with the appropriate style selected. Click inside the “Press new shortcut key” field:

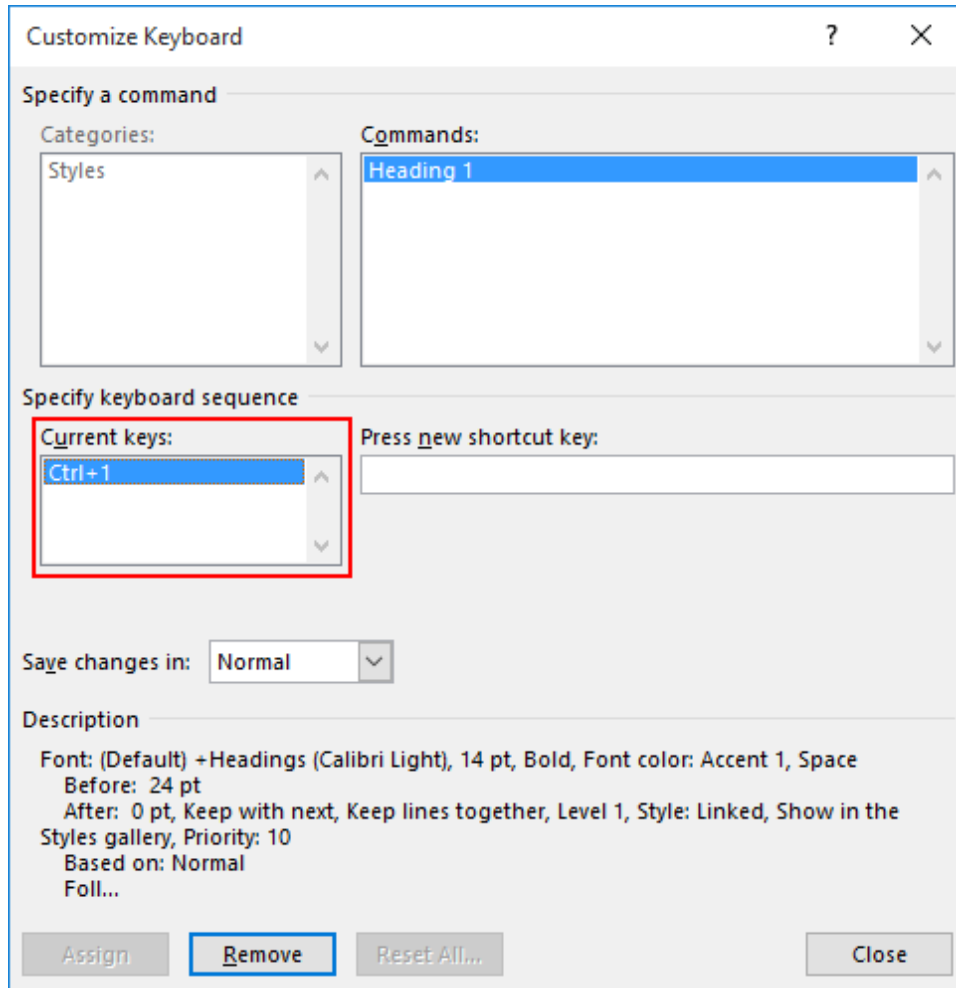


Now, press the keys that you want to assign to this heading. They will be shown in the selected field. You will also see what command this shortcut sequence is assigned to, if any:



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:

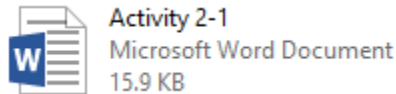


ACTIVITY 2-1

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:



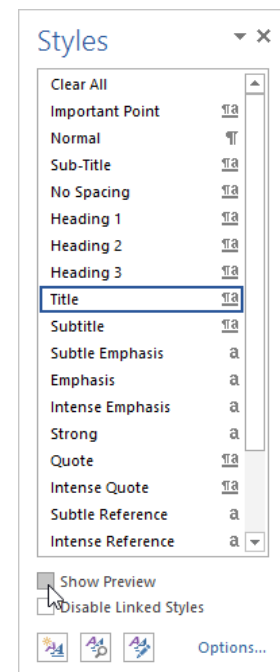
2. Click the option button in the Styles group on the Home tab to open the Styles task pane:



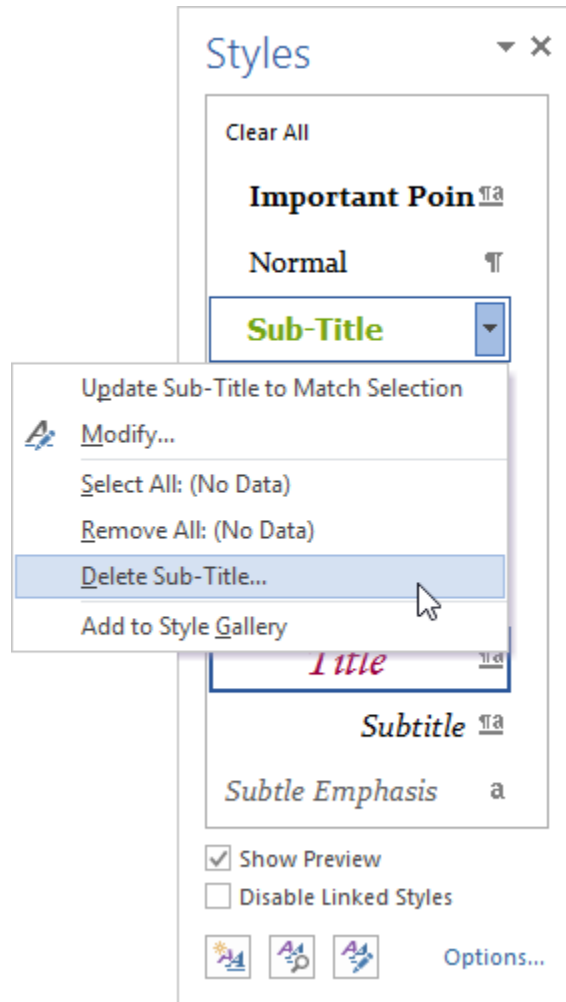
(It does not matter where the Styles task pane is positioned as long as you can fully see it. If necessary, you can move and resize the pane.)

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

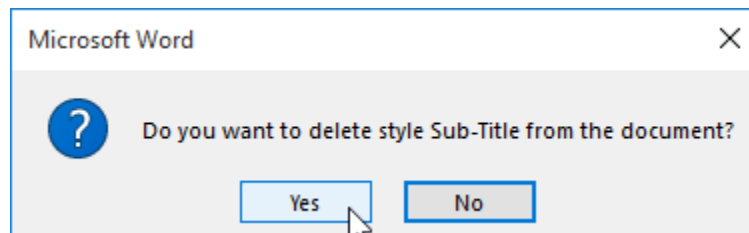
(If this box is already checked, skip to the next step.)



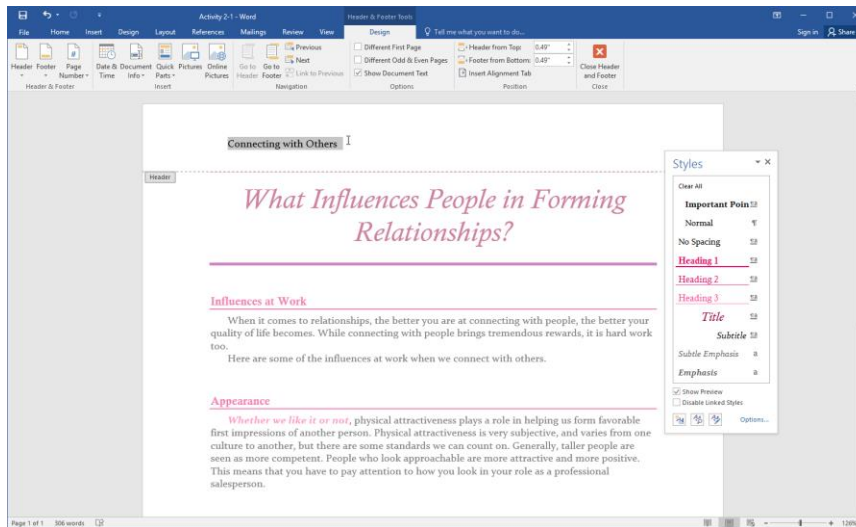
- There is a duplicate style in this list. Right-click the Sub-Title style and click Delete Sub-Title:



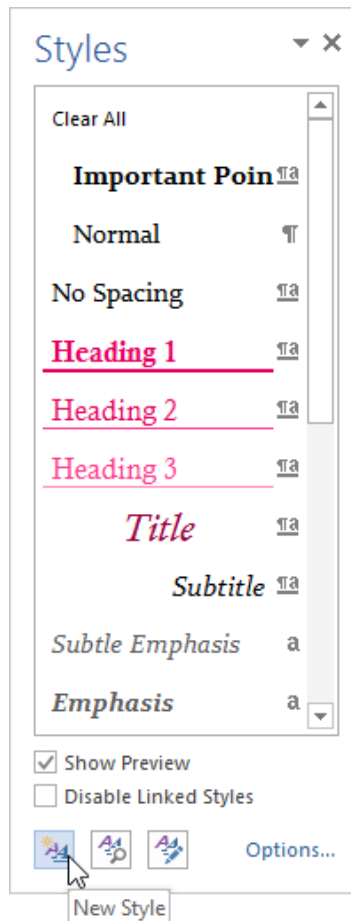
- Click Yes to confirm the operation:



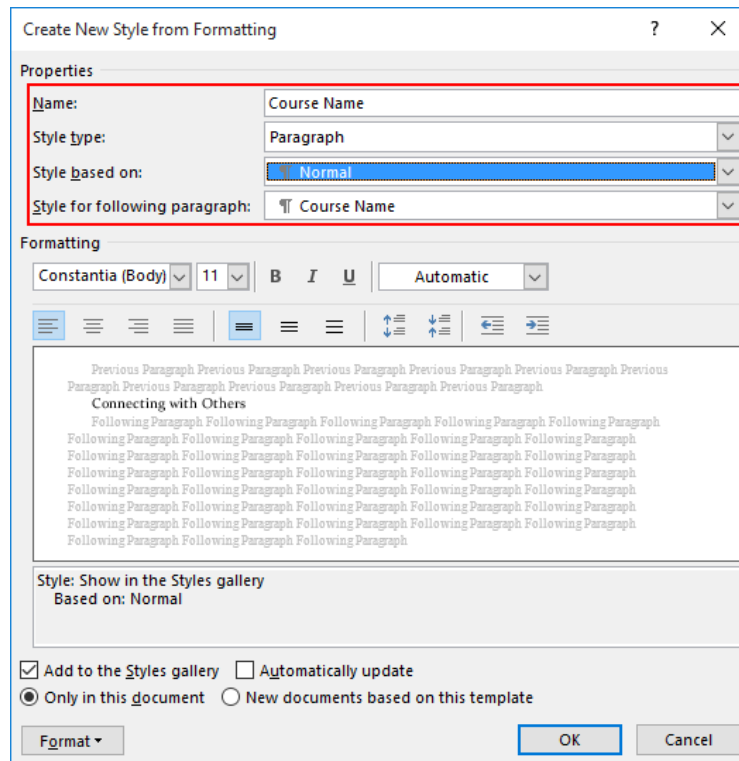
- Now let's create a new style. Double-click in the header of the document and select its text:



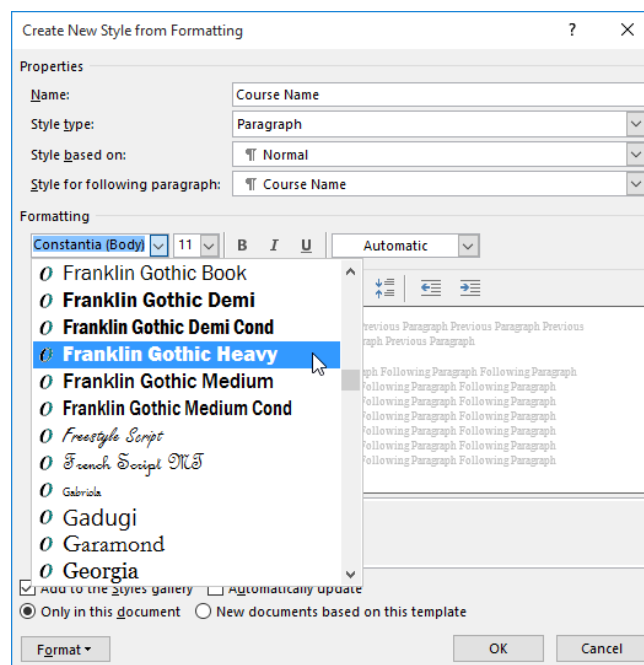
- Click the New Style button in the Styles task pane:



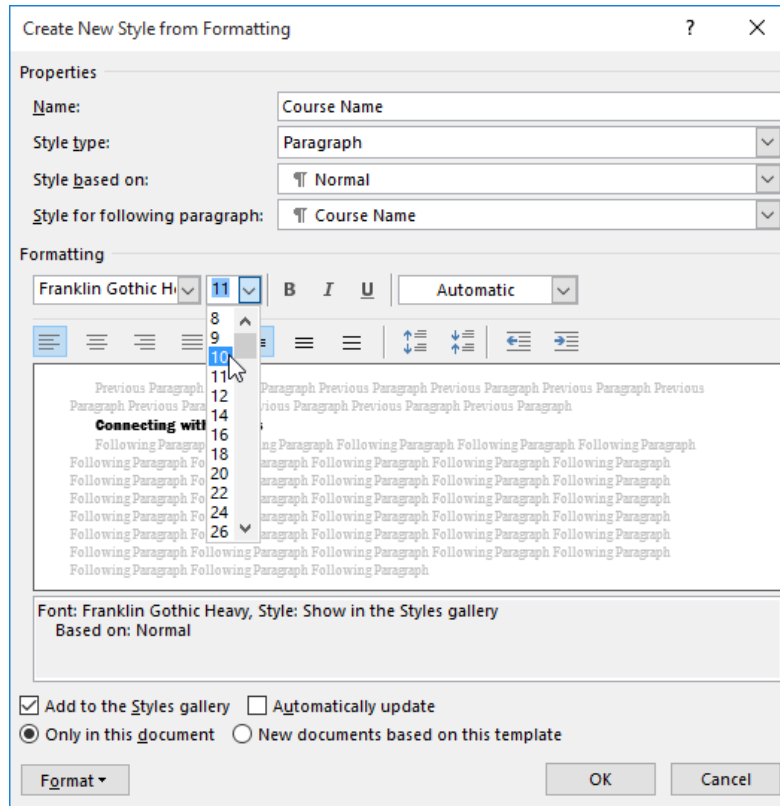
8. Type “Course Name” for the style name. Ensure that the “Style type” is set to Paragraph and that the style is based on Normal. The “Style for following paragraph” menu should also be set to “Course Name:”



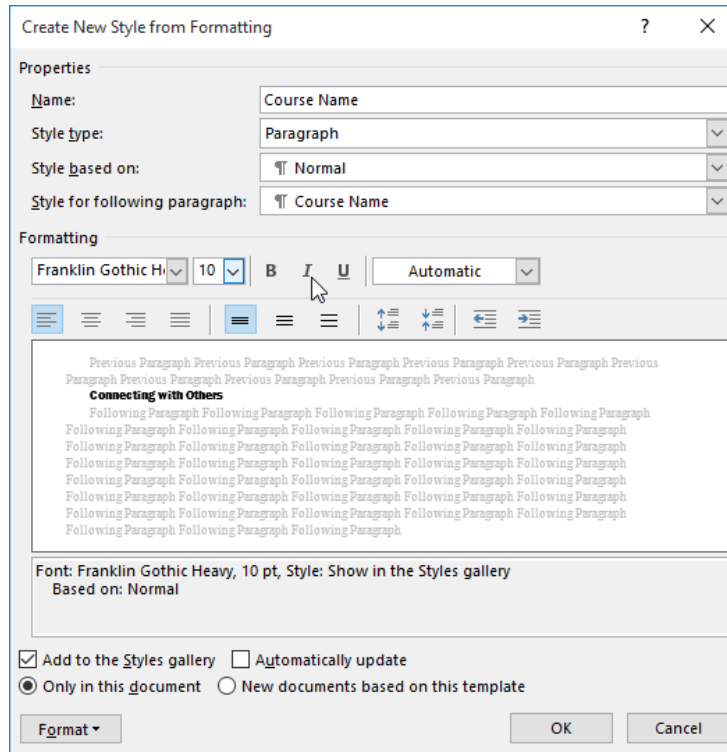
9. Change the font face to Franklin Gothic Heavy:



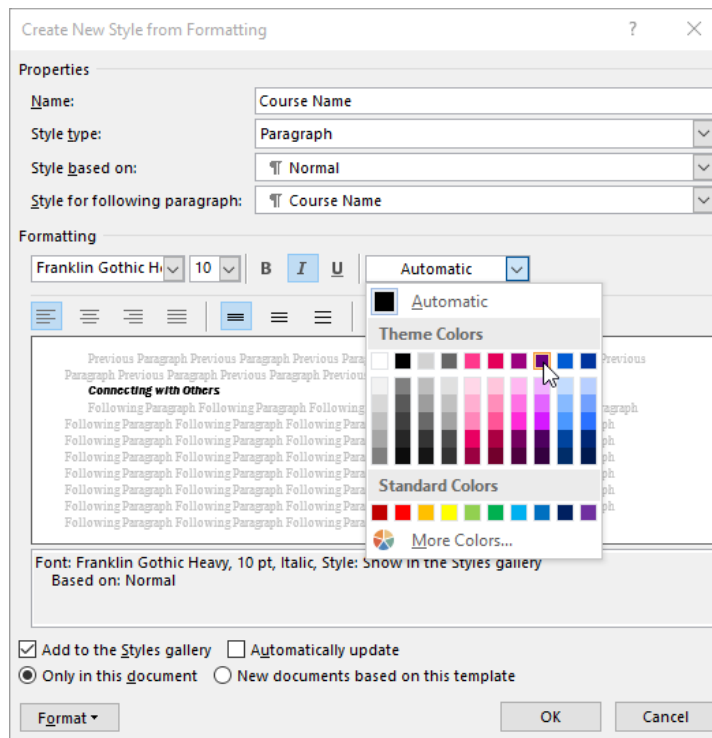
10. Decrease the font size to 10:



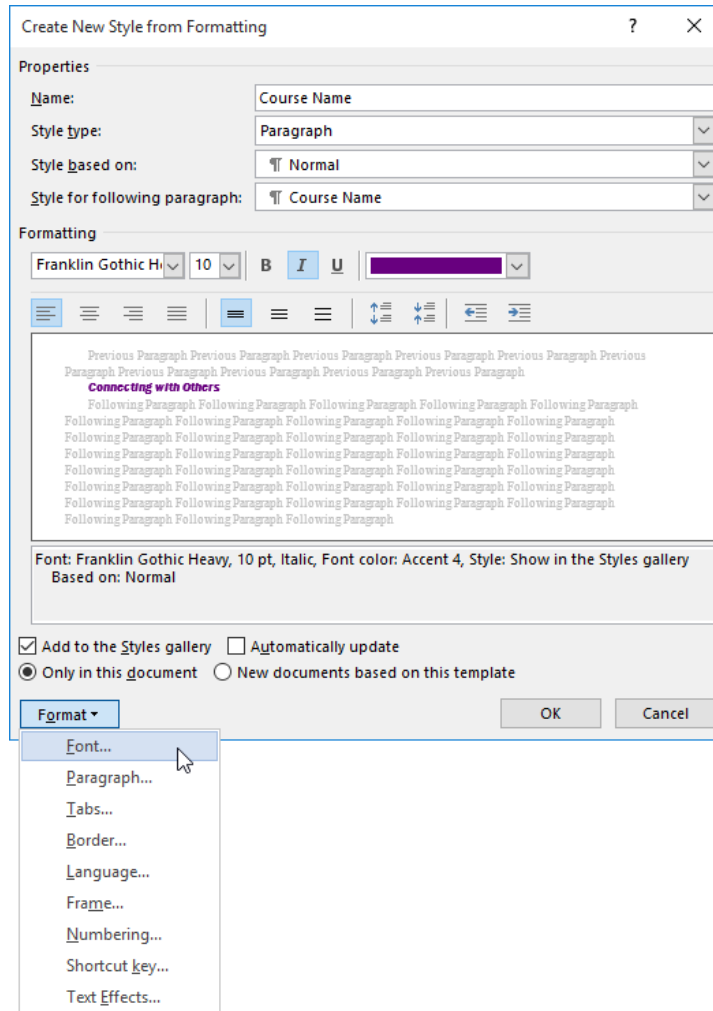
11. Apply an italic effect:



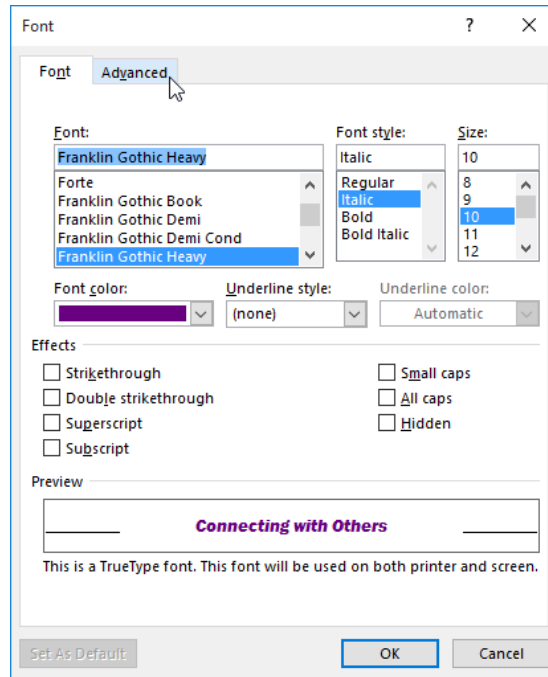
12. Finally, click the color menu and choose any theme color in the top row of the palette:



13. Click Format → Font:

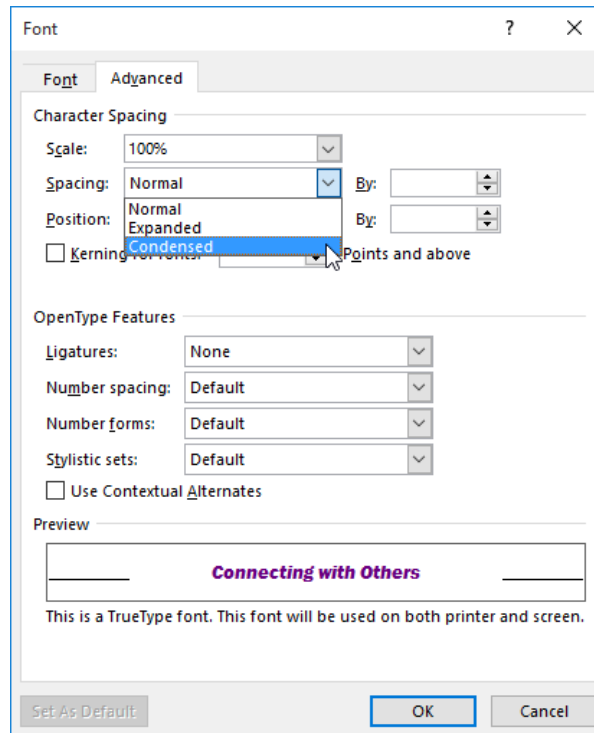


14. This will open the Font dialog. Click the Advanced tab:

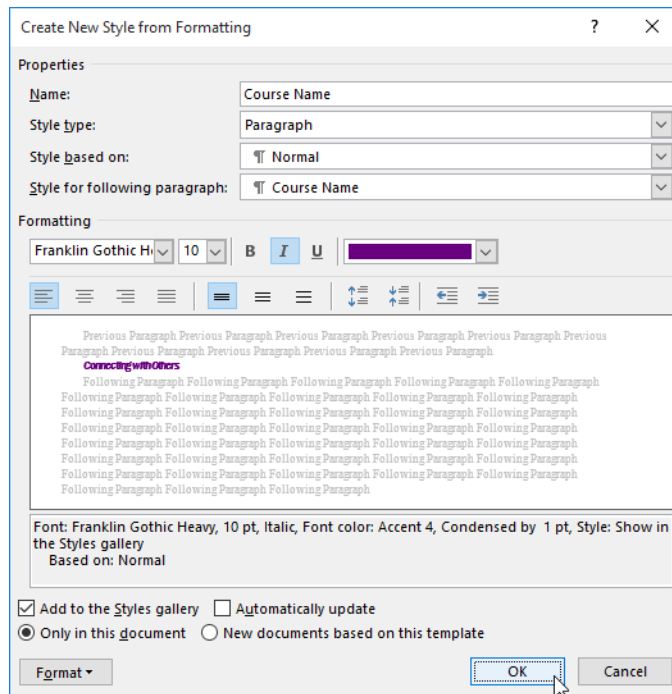


(If the Advanced tab is already displayed, skip to the next step.)

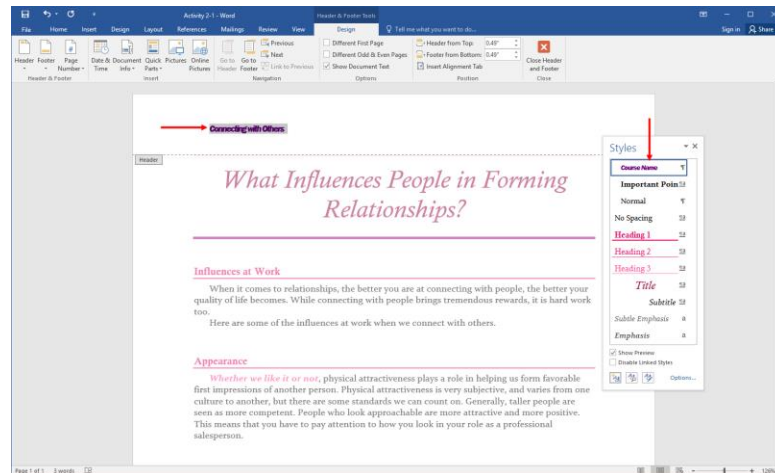
15. Click the Spacing drop-down menu and click Condensed. Then, click OK:



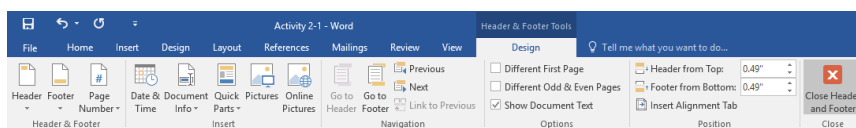
16. Click OK in the Create New Style from Formatting dialog box to create your style:



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



18. Close Header and Footer view:



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.

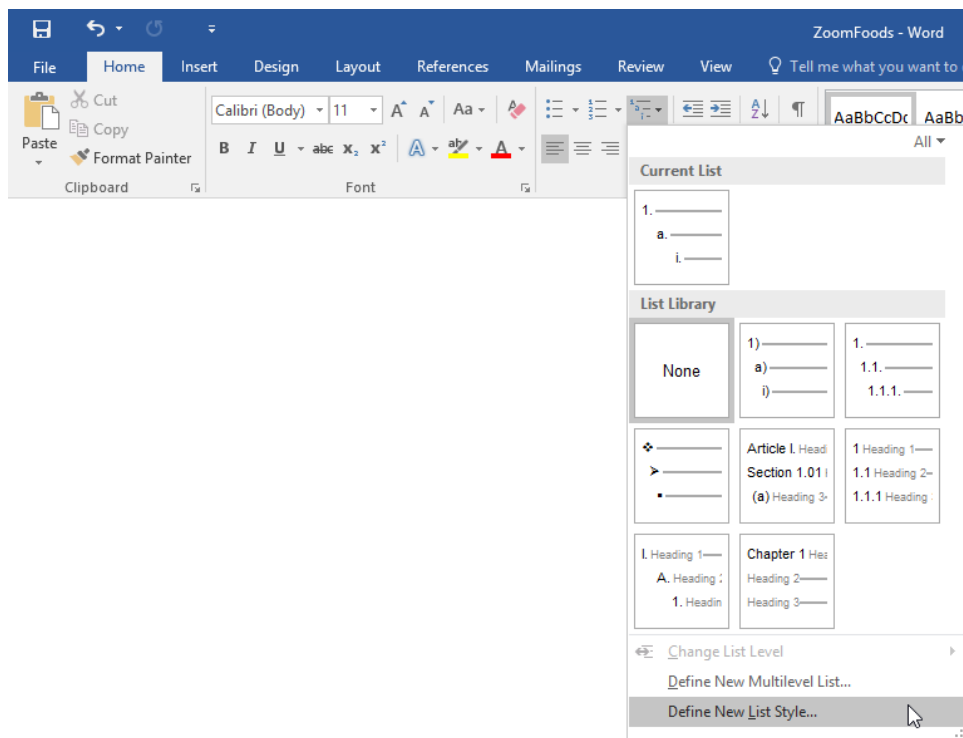
Topic Objectives

In this topic, you will learn:

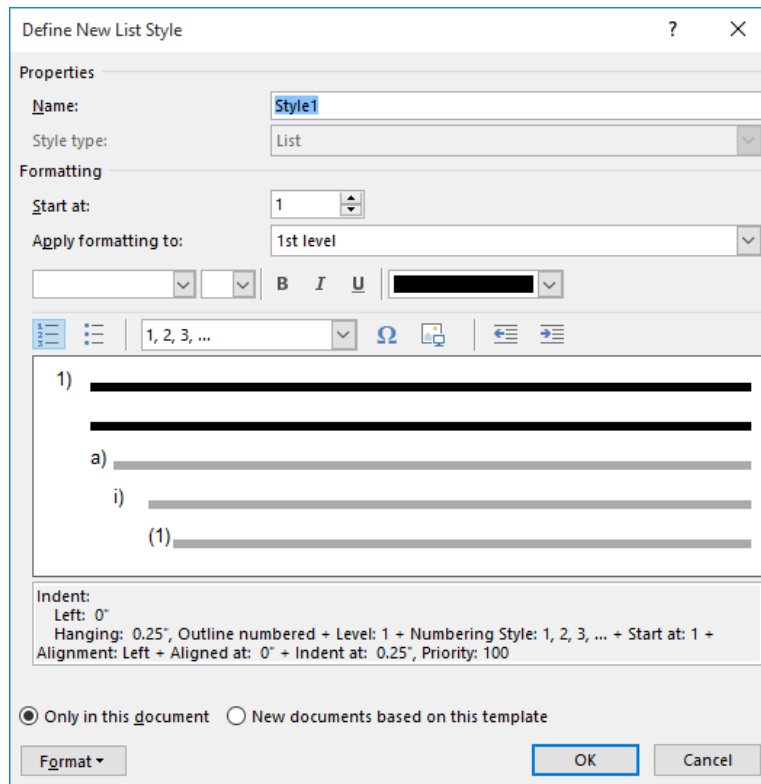
- How to create list styles
- How to create table styles

TOOLS FOR LIST STYLES

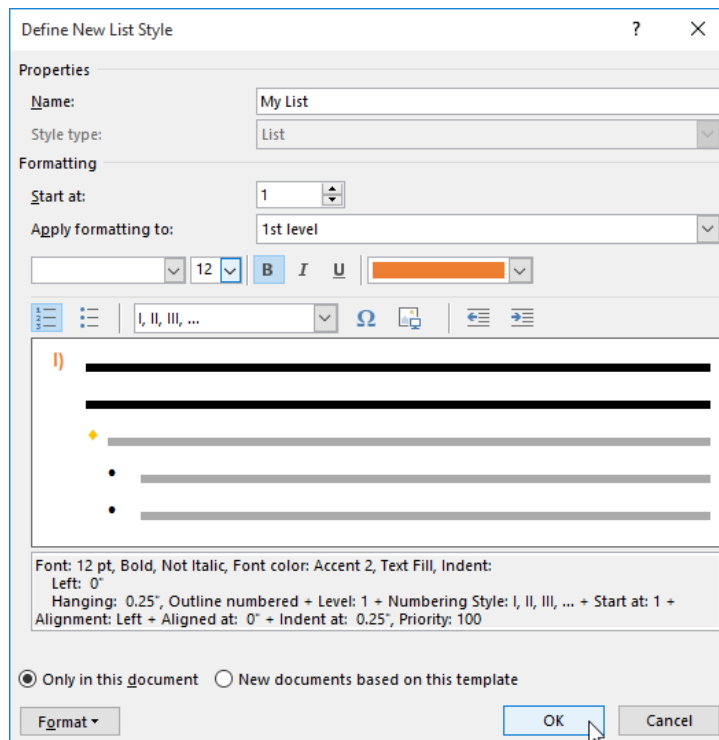
To create a new list style, click Home → Multilevel List → Define New List Style:



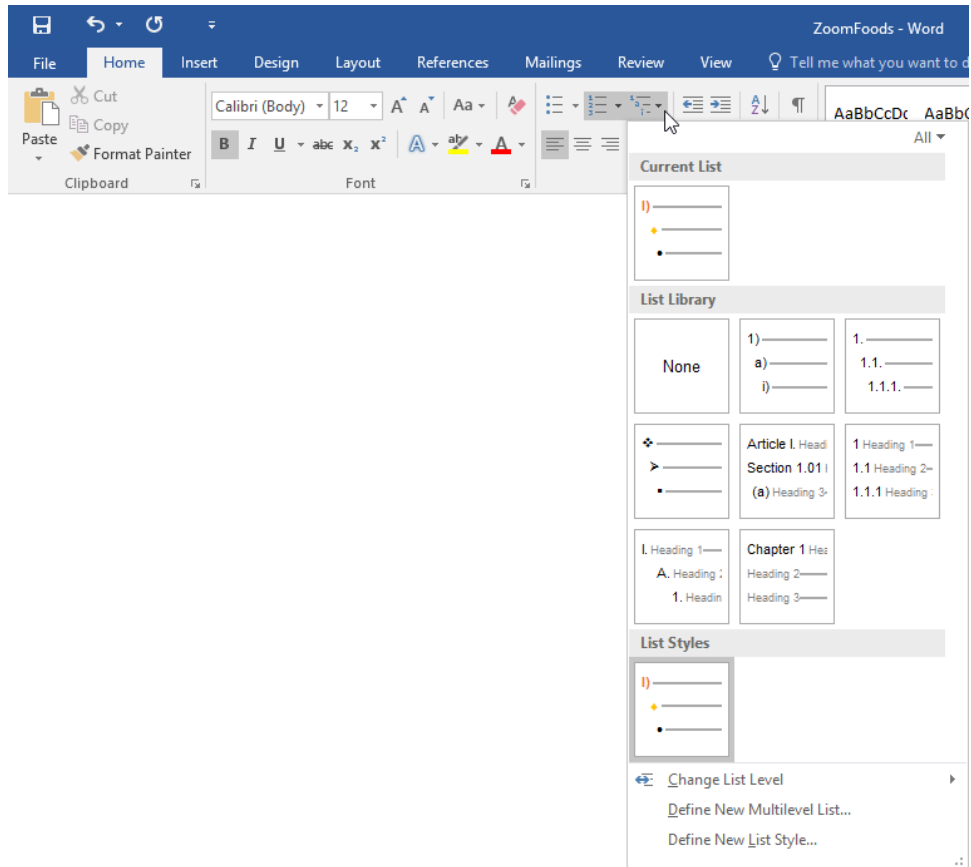
The Define New List Style dialog box will open:



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

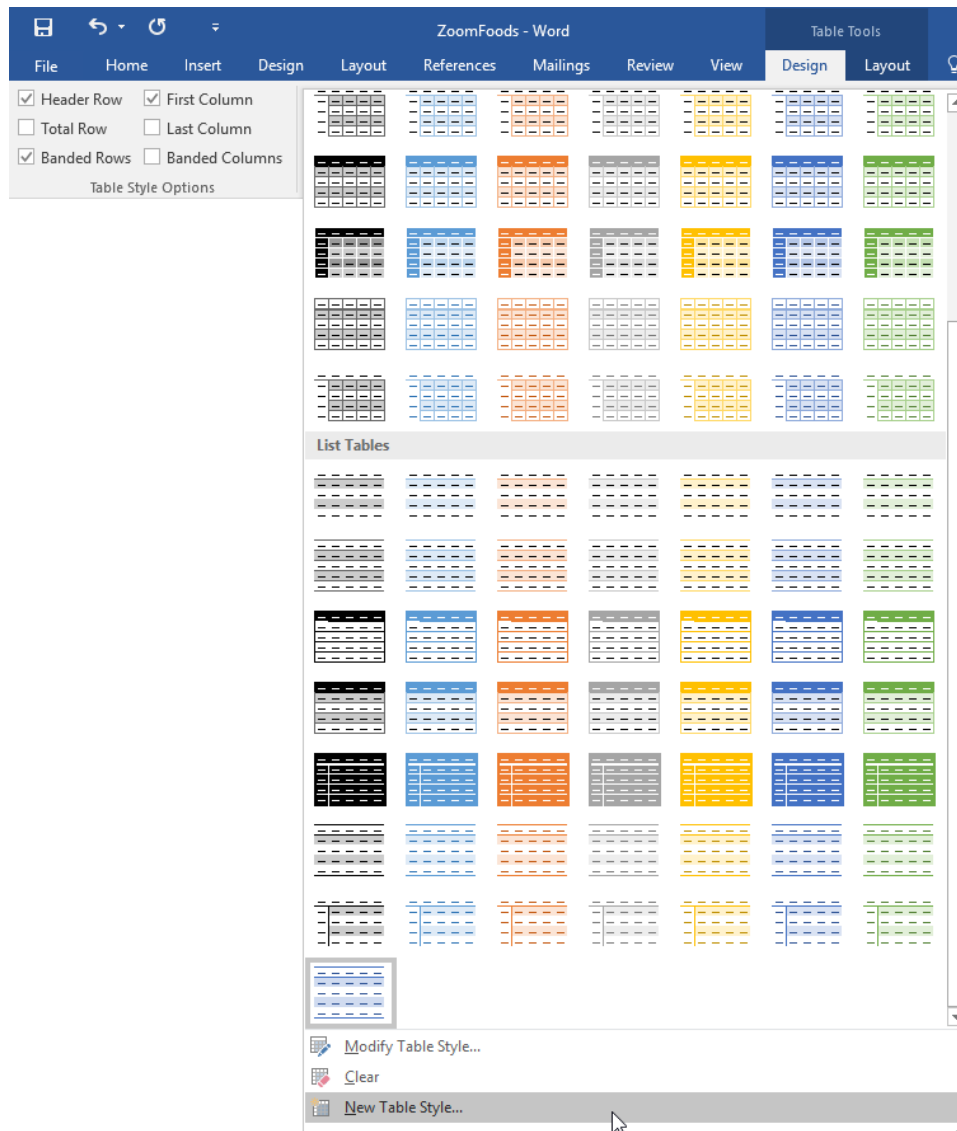


Once you have defined a style, it will appear in the Multilevel List drop-down menu:



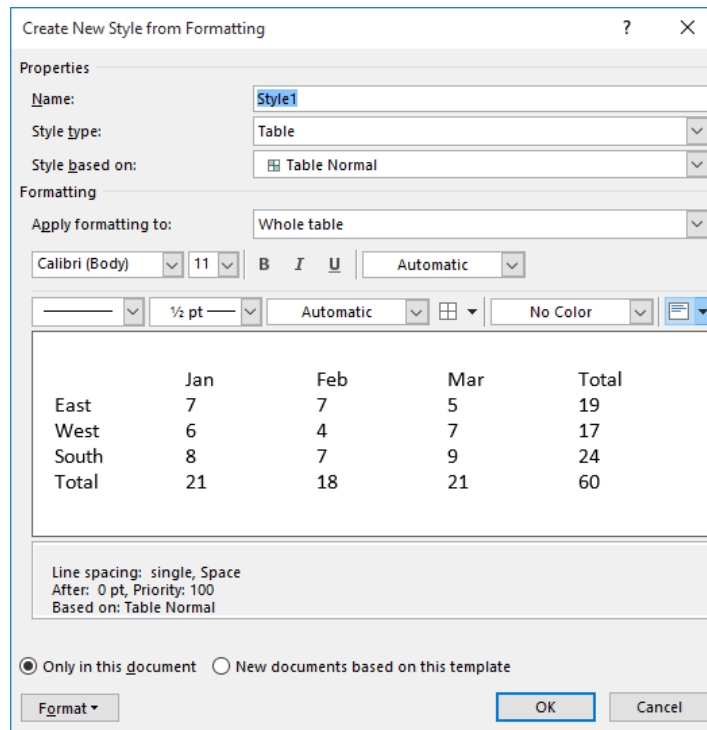
TOOLS FOR TABLE STYLES

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 → More arrow in the Table Styles group → New Table Style:

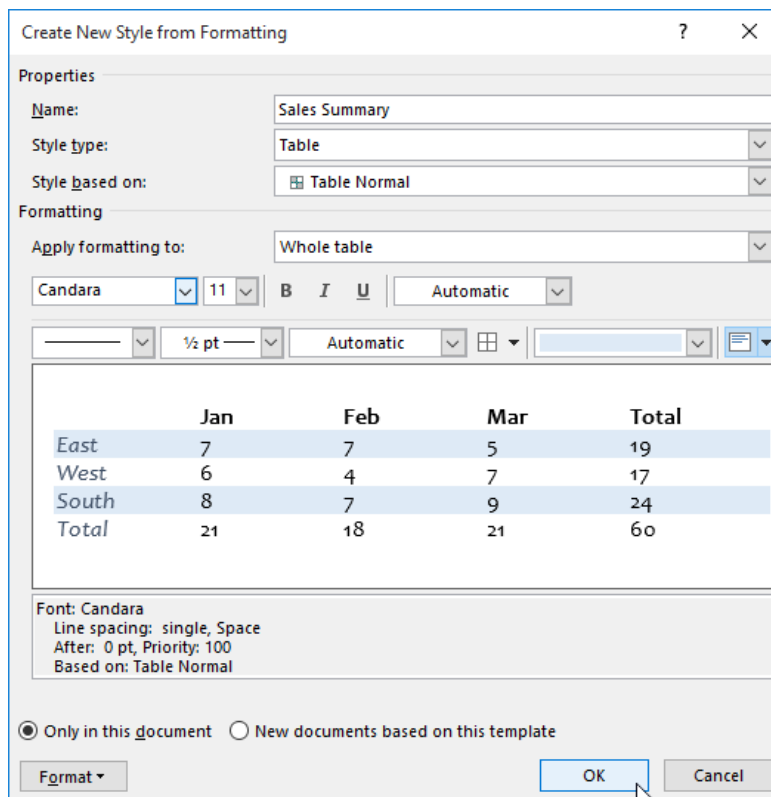


(You can also open the Create New Style from Formatting dialog from the Styles task pane and choose Table from the “Style type” menu.)

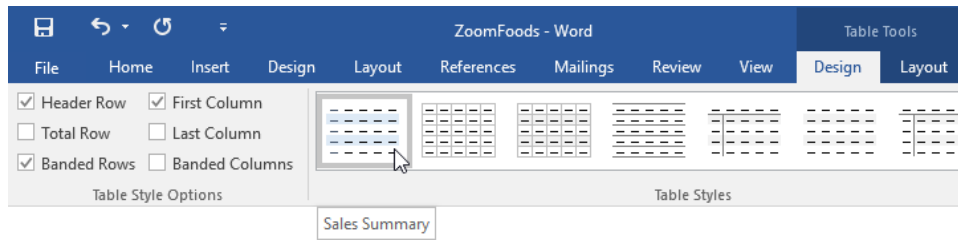
The Create New Style from Formatting dialog will open, ready to create a new table style:



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



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

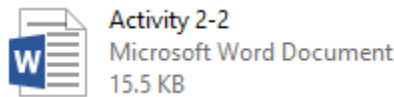


ACTIVITY 2-2

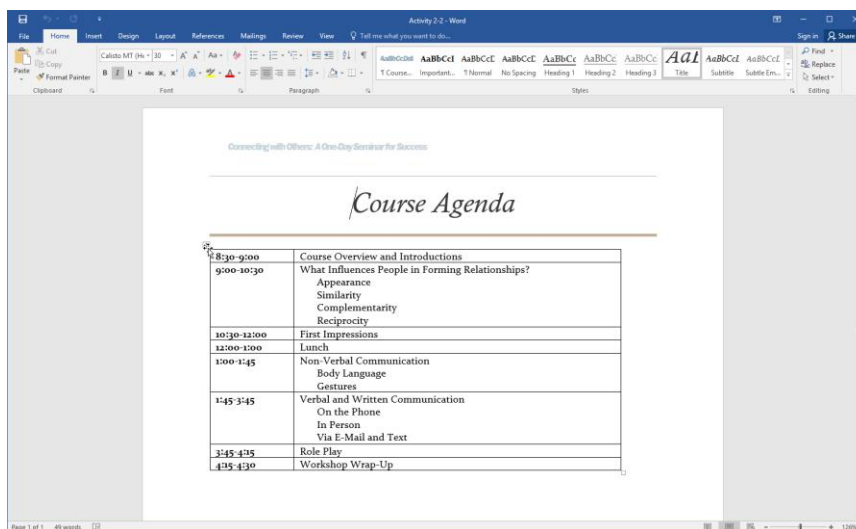
Creating Custom List and Table Styles

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

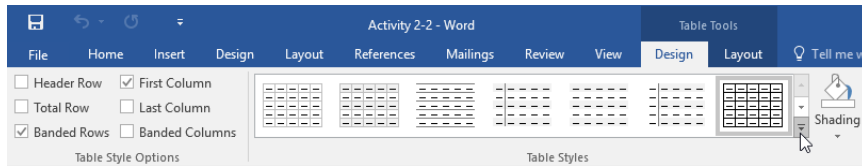
1. Open Microsoft Word 2016 and open Activity 2-2:



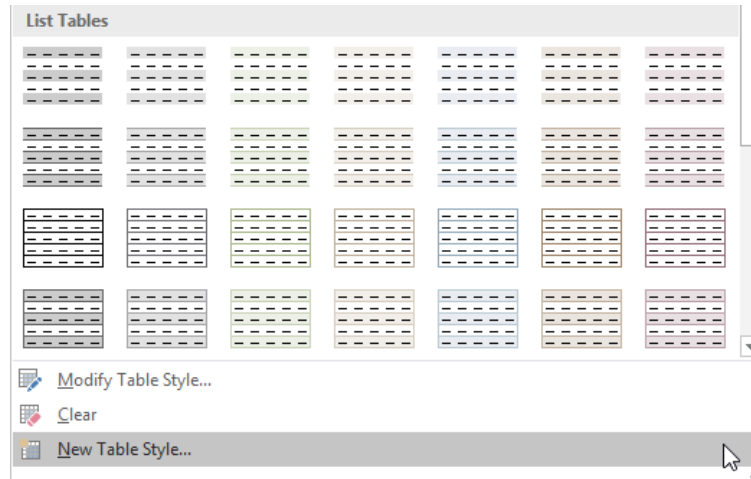
2. First, let's spruce up the table. Select the table in the document:



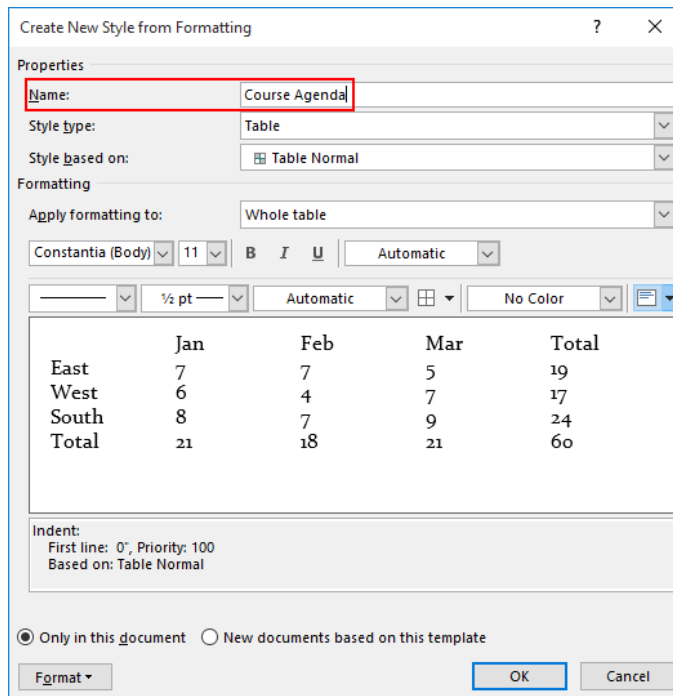
- Click the Table Tools – Design tab and click the More arrow in the Table Styles group:



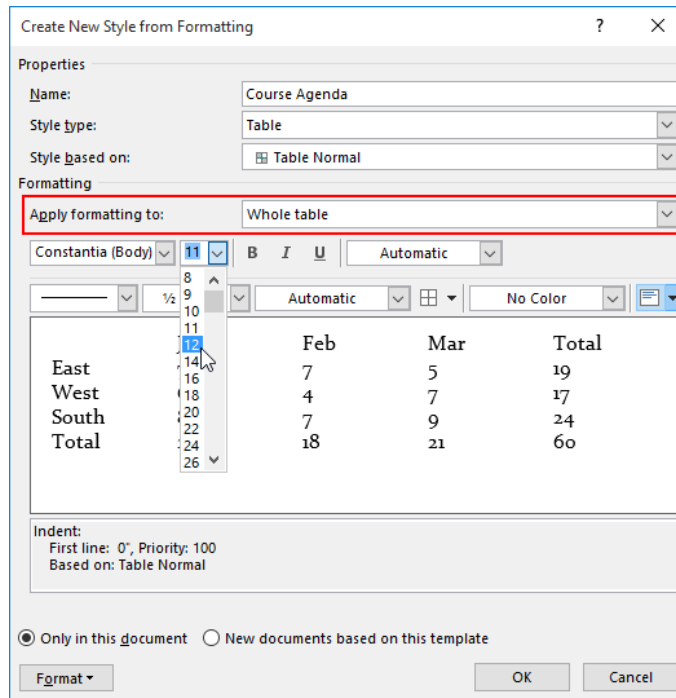
- Click New Table Style at the bottom of the expanded gallery:



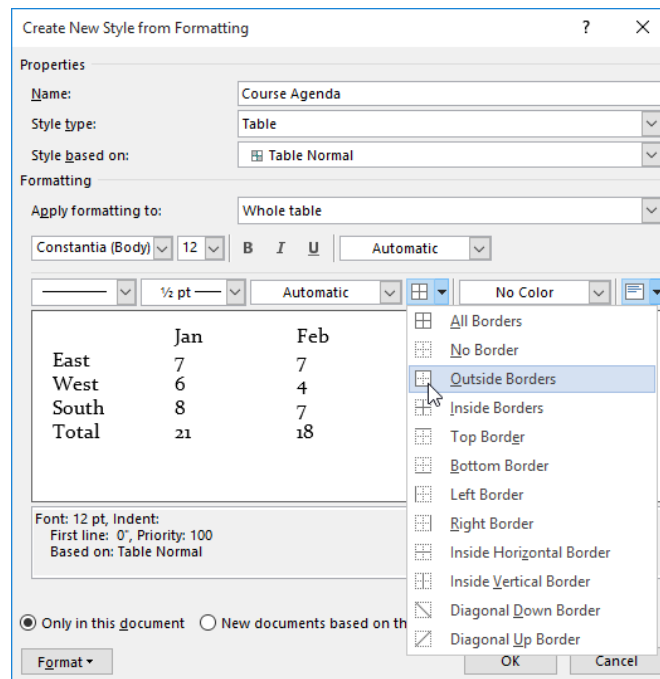
- The Create New Style from Formatting dialog box will open. Enter “Course Agenda” in the Name text box:



- Ensure that the “Apply formatting to” menu says “Whole table.” Then, increase the font size to 12:

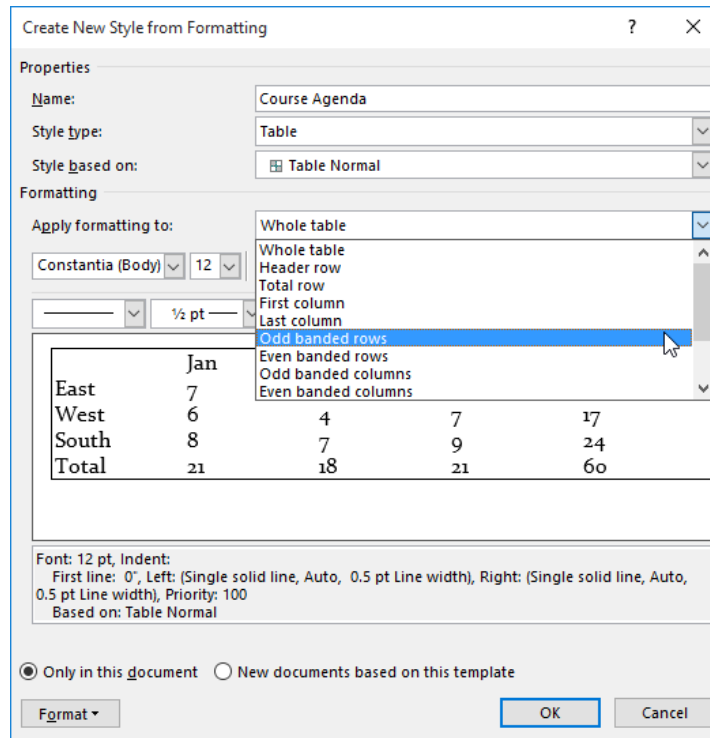


- Click the Borders menu and click Outside Borders:

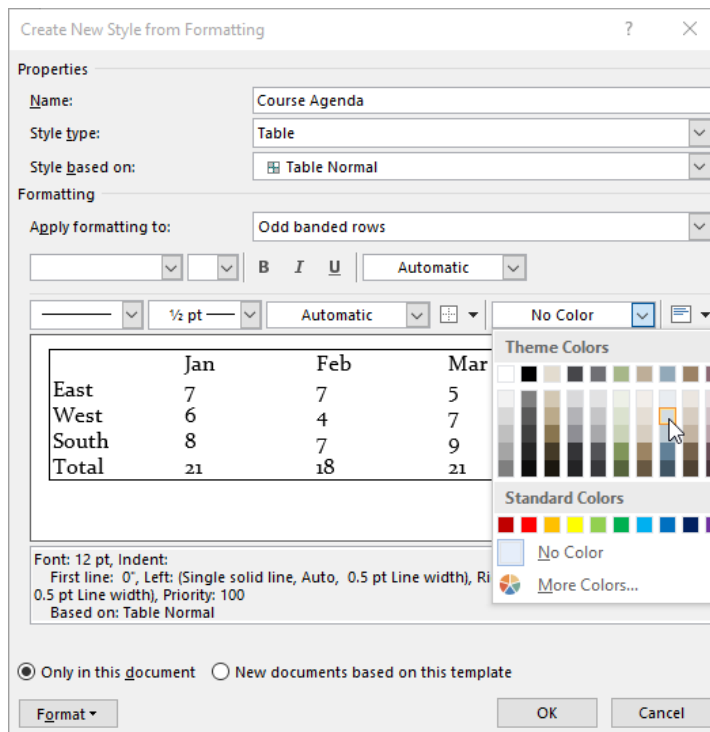


This will apply a border only to the outside of the table.

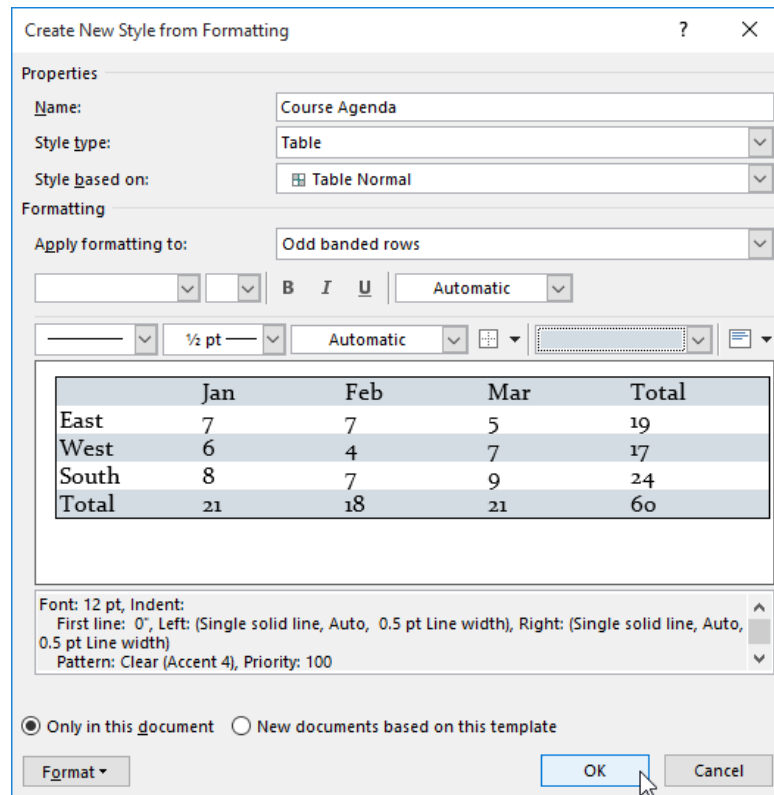
- Now let's create banded rows. Click the "Apply formatting to" menu and click "Odd banded rows:"



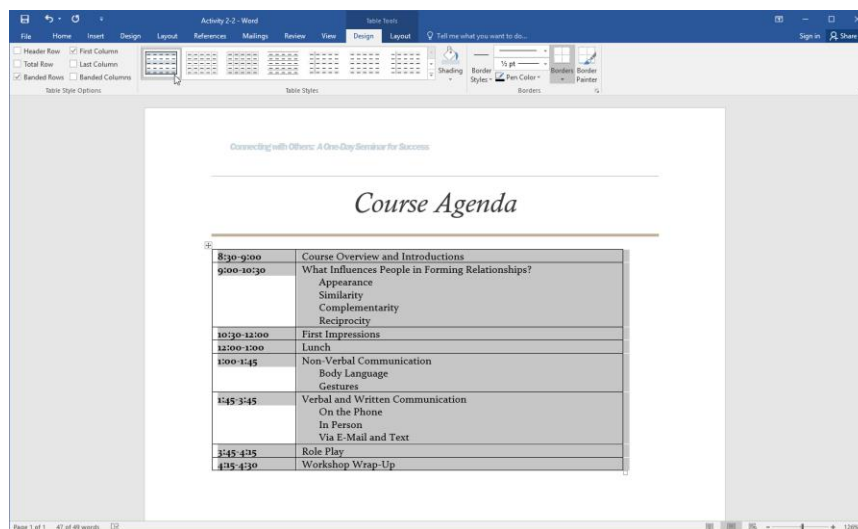
- Click the Fill Color menu and click "Blue-Gray, Accent 4, Lighter 60%:"



- Click OK to create the style:



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

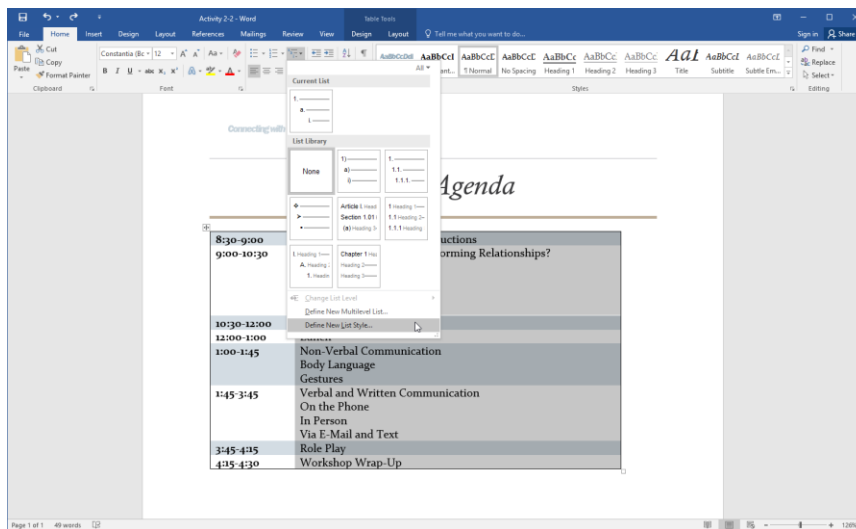


(You may need to browse through the gallery using the arrows on its right-hand side.)

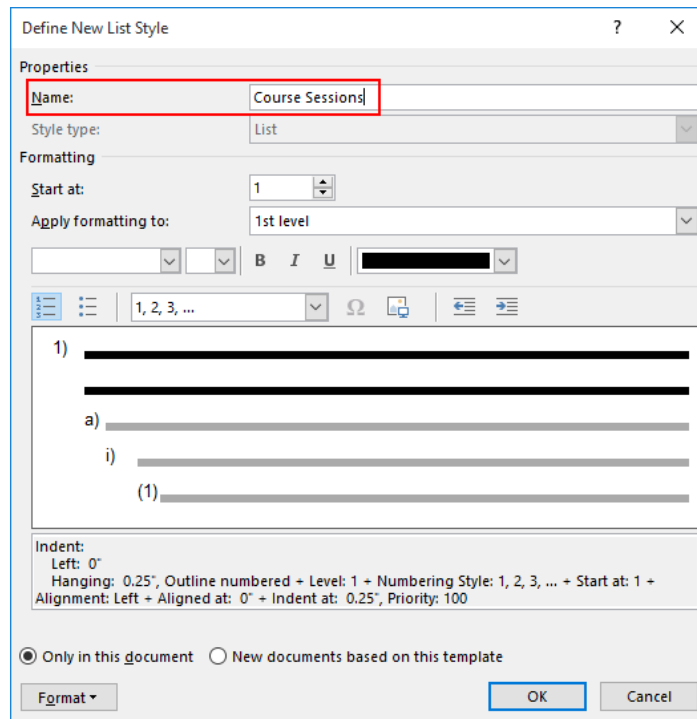
12. Review the formatting changes that have been applied to the table:

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

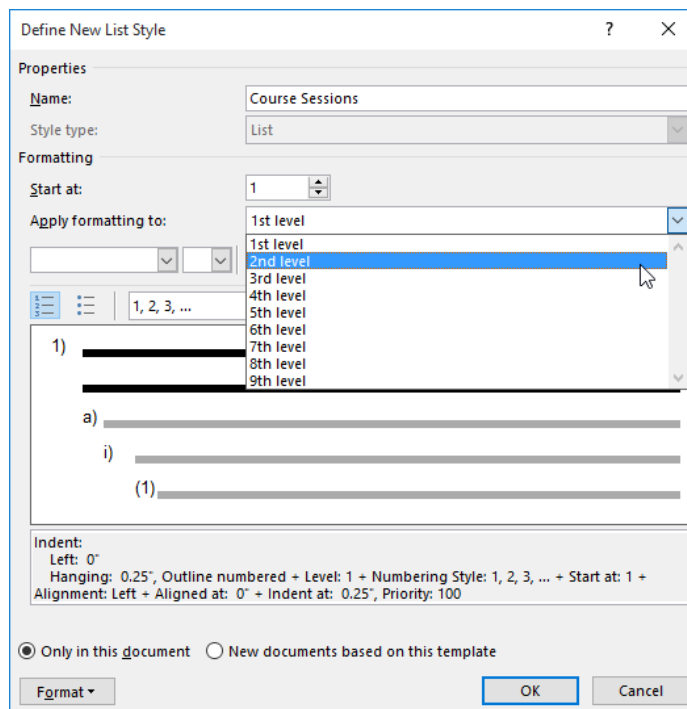
13. Now let's format the list inside the table. Select the text in the second column and click Home → Multilevel List → Define New List Style:



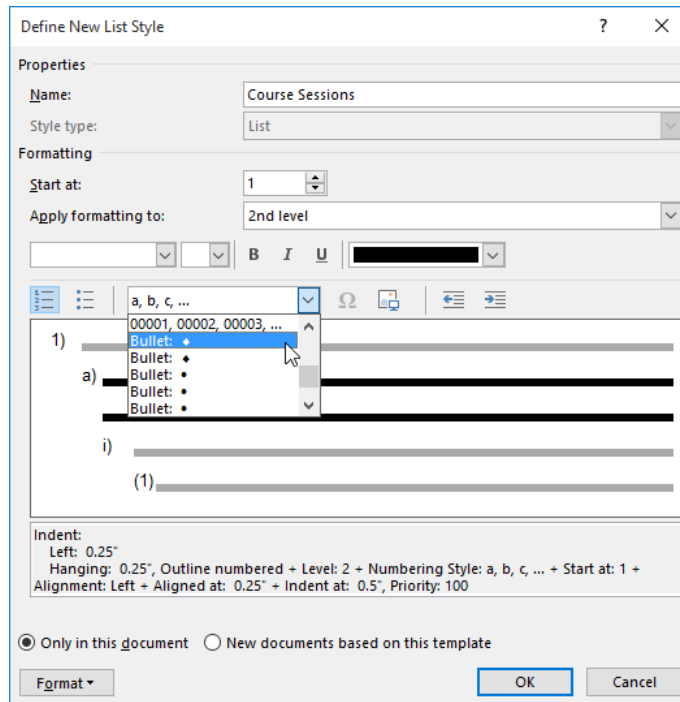
14. Enter “Course Sessions” in the Name text box:



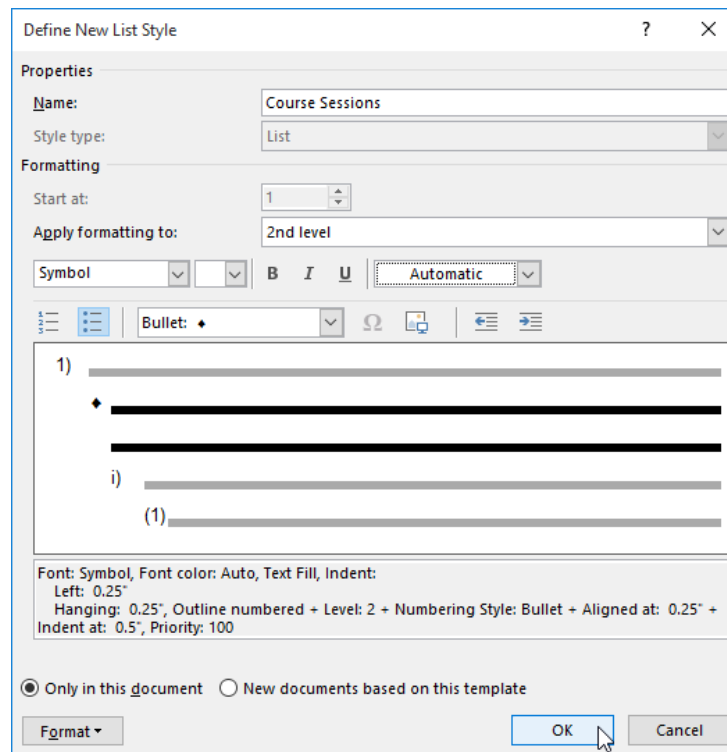
15. By default, the first level of numbering will be a numeral with a closing parenthesis. This is fine, so let's change the next level. Click the “Apply formatting to” menu and choose “2nd level:”



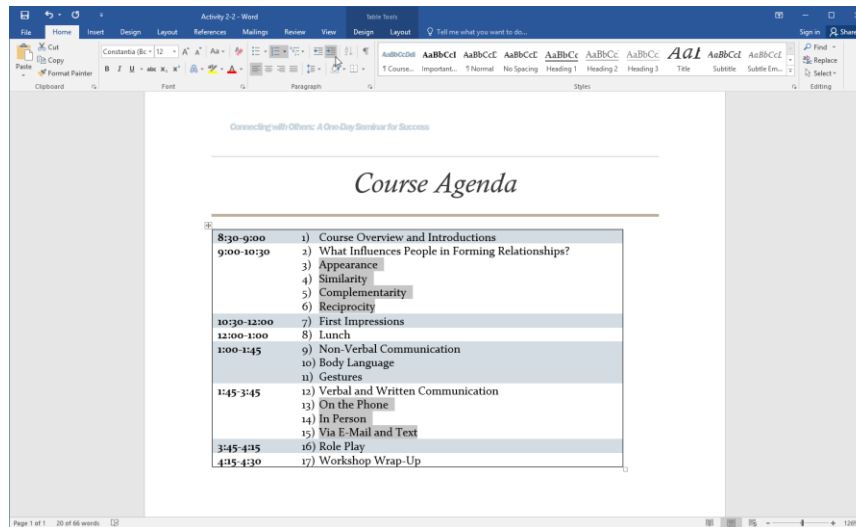
16. Click the drop-down arrow next to the Bullets command and choose the diamond bullet:



17. Click OK to create the style:



18. Next, select the sub-points for the 9 a.m. session and the 1:45 p.m. session. Click Home → Increase Indent:



(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.

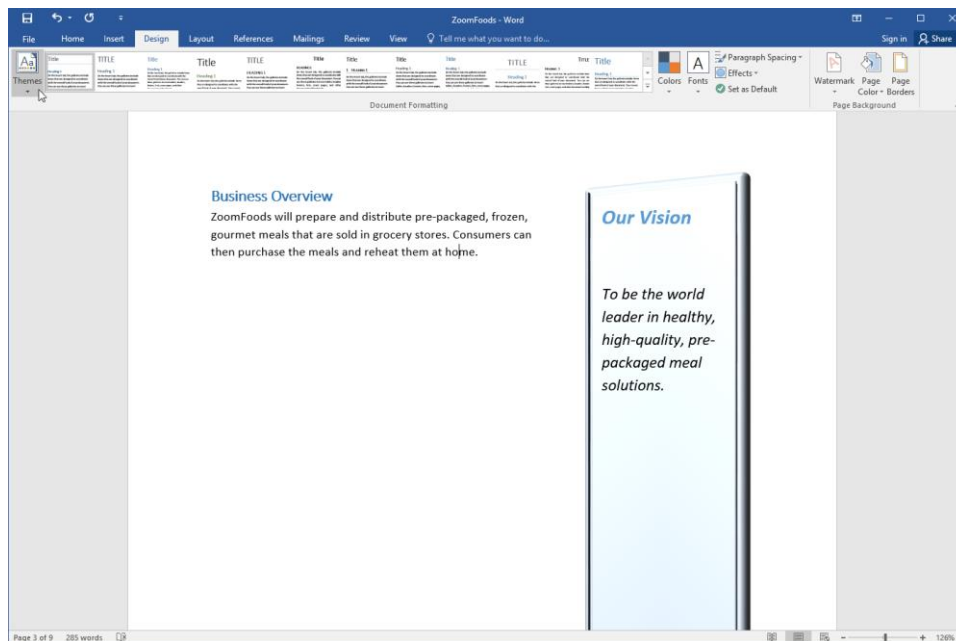
Topic Objectives

In this topic, you will learn:

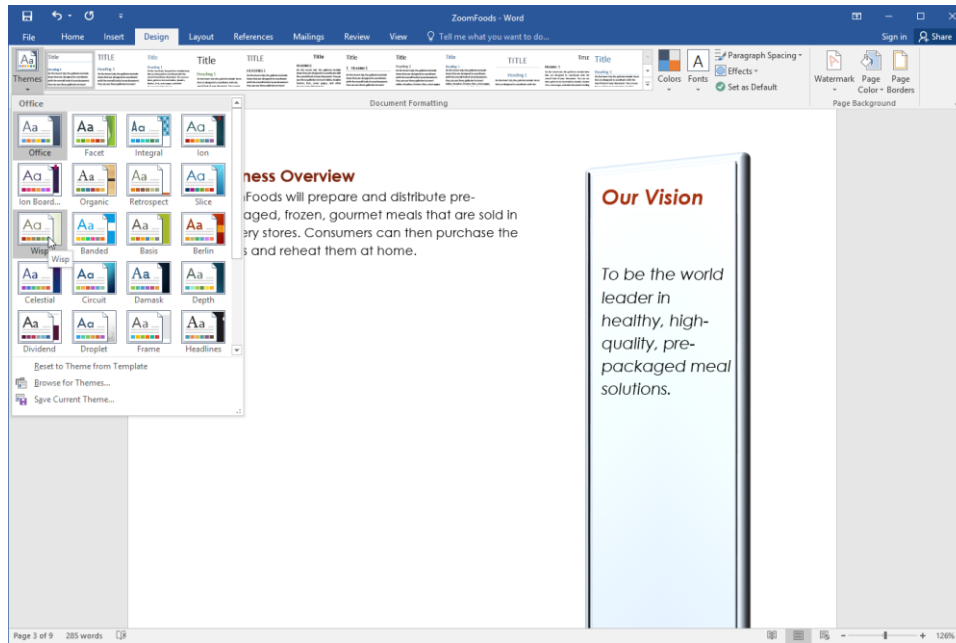
- How to apply document themes and style sets
- How to create custom style sets
- How to use the Document Formatting group on the Design tab
- How to create custom color and font schemes
- How to save and access custom themes

APPLYING DOCUMENT THEMES

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

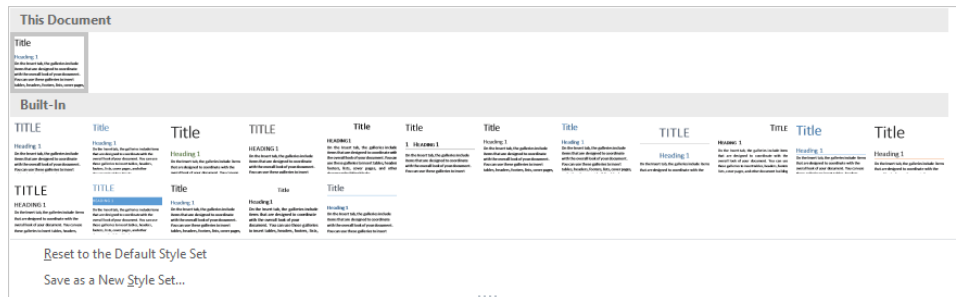


This will show a gallery of themes. As you mouse over each thumbnail in this gallery, you will see a preview applied to your document (if it has theme elements such as page backgrounds, headers, styles, or diagrams). Click the new theme to apply it:



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:

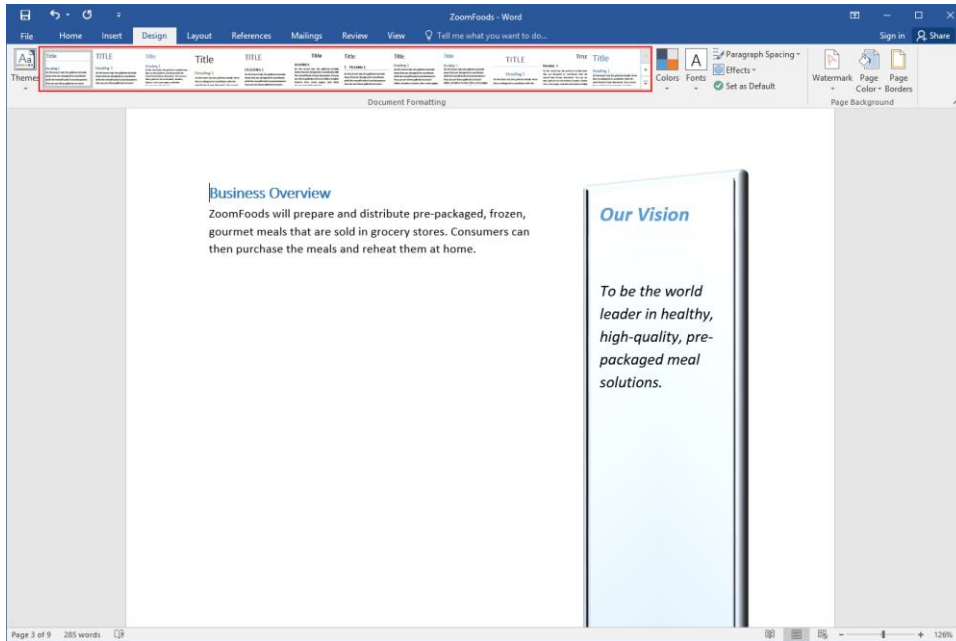


You can find this gallery in the Document Formatting group of the Design tab.

CHANGING THE STYLE SET

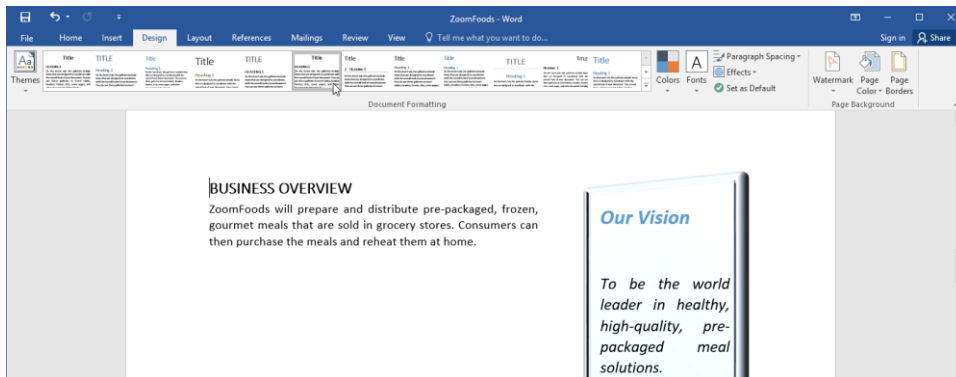
In Microsoft Office Word 2016, there are 17 style sets to choose from. Each of these style sets includes different styles so that you can keep the current look of the theme, but customize the appearance of text.

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



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.

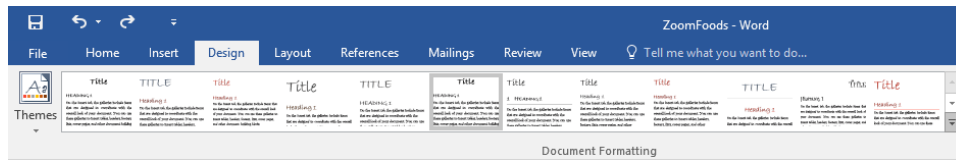
As you move your cursor over each style set, you will see a preview applied to your document:



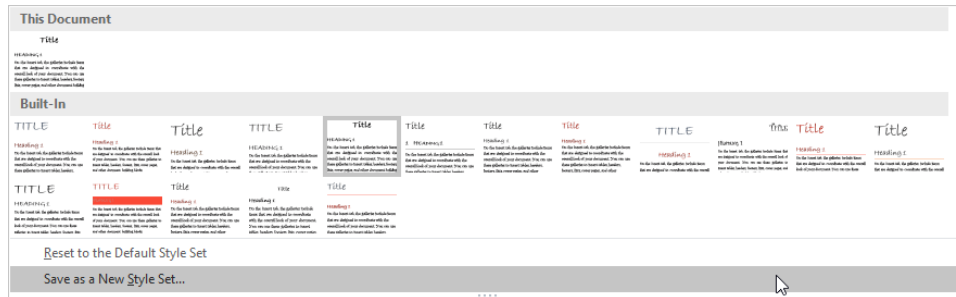
In addition, a document can only have one style set applied to it at a time, although you can change this set whenever you want.

CREATING CUSTOM STYLE SETS

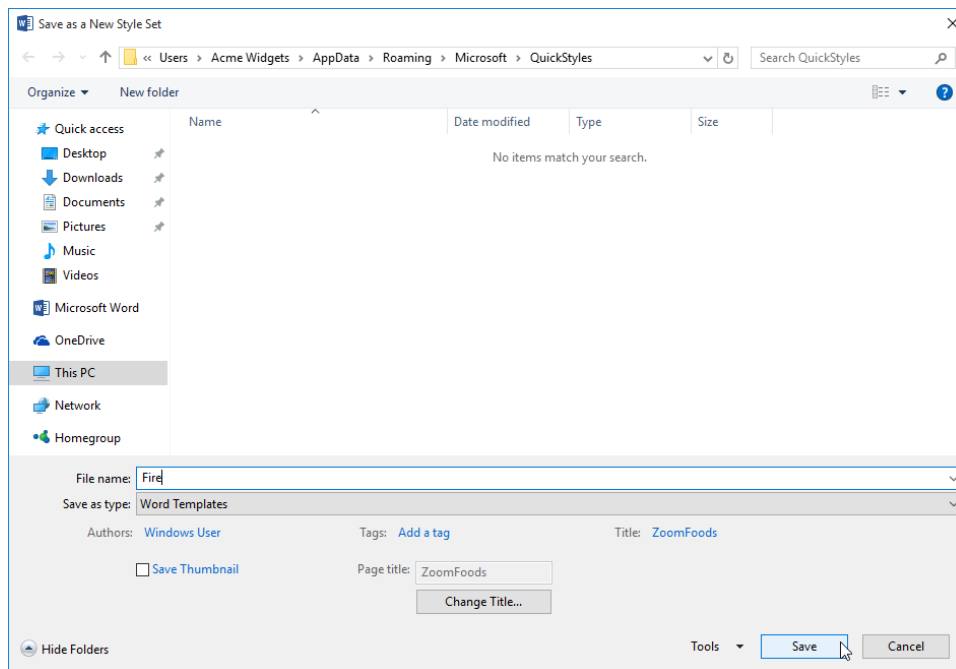
If you have created custom styles, you can save your current style set. To begin, click the More arrow in the Document Formatting gallery on the Design tab:



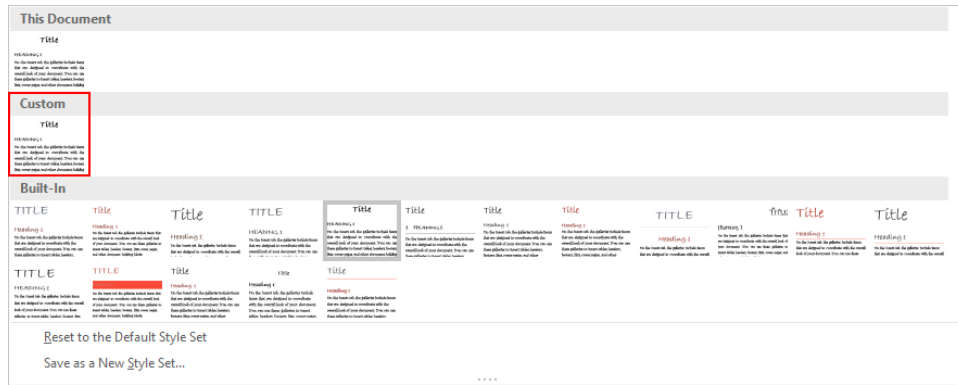
Then, click “Save as a New Style Set:”



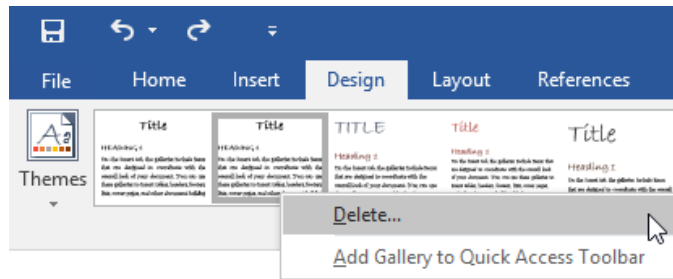
(Notice that you can reset the current style set with this menu as well.)
The “Save as a New Style Set” dialog box will open. Enter the name and click Save. Do not modify any other settings:



The style set will now appear in the Document Formatting gallery in a special Custom section:

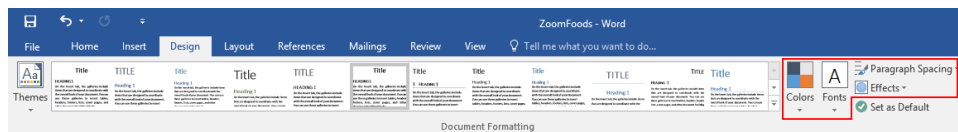


If a style set is no longer needed, you can delete it by right-clicking on it and clicking Delete:

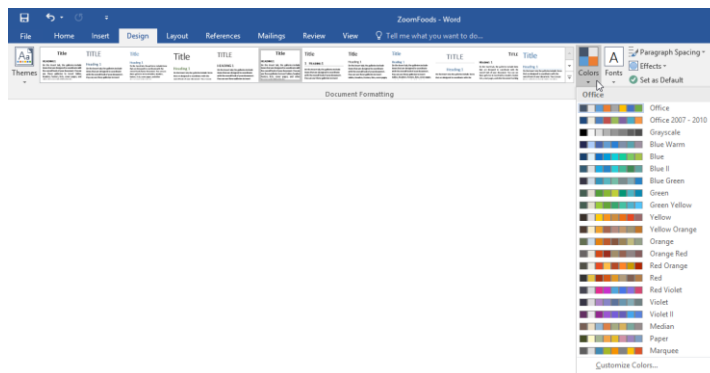


THE DOCUMENT FORMATTING GROUP

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

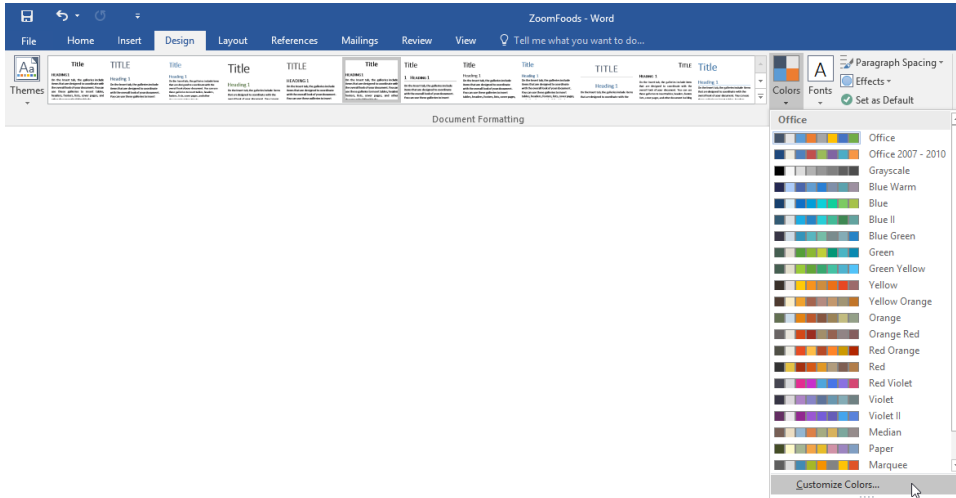


Click a menu and choose the desired option:

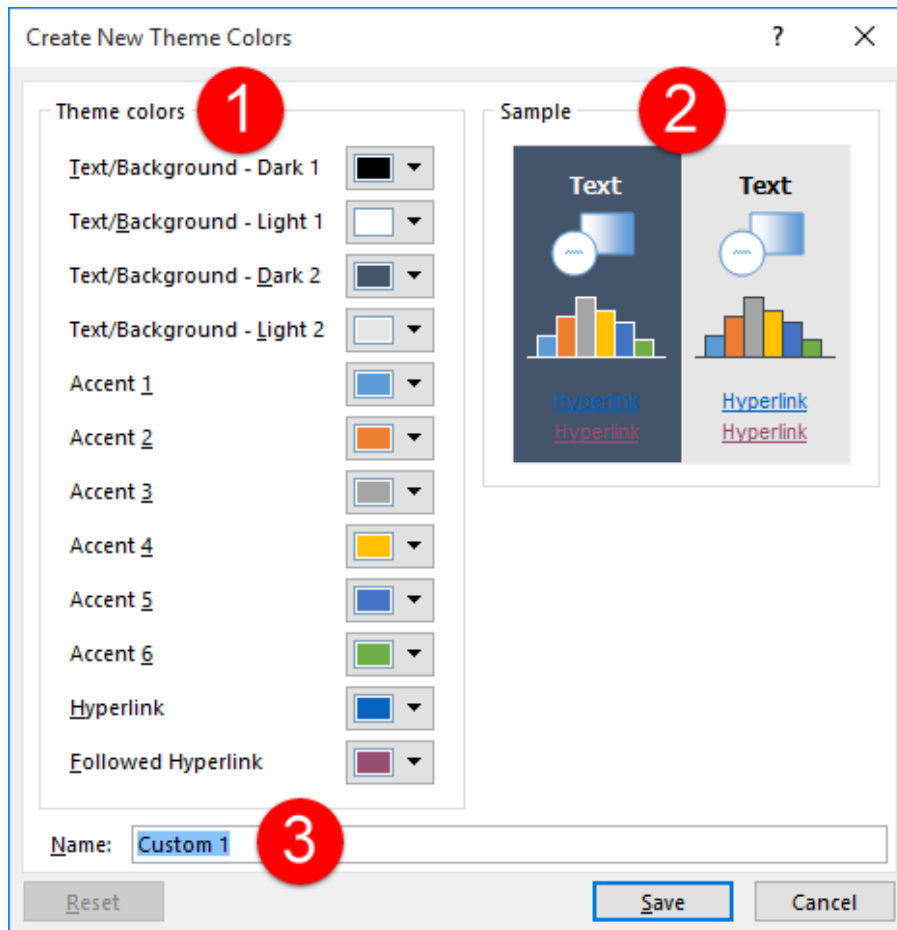


CREATING CUSTOM COLOR SCHEMES

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

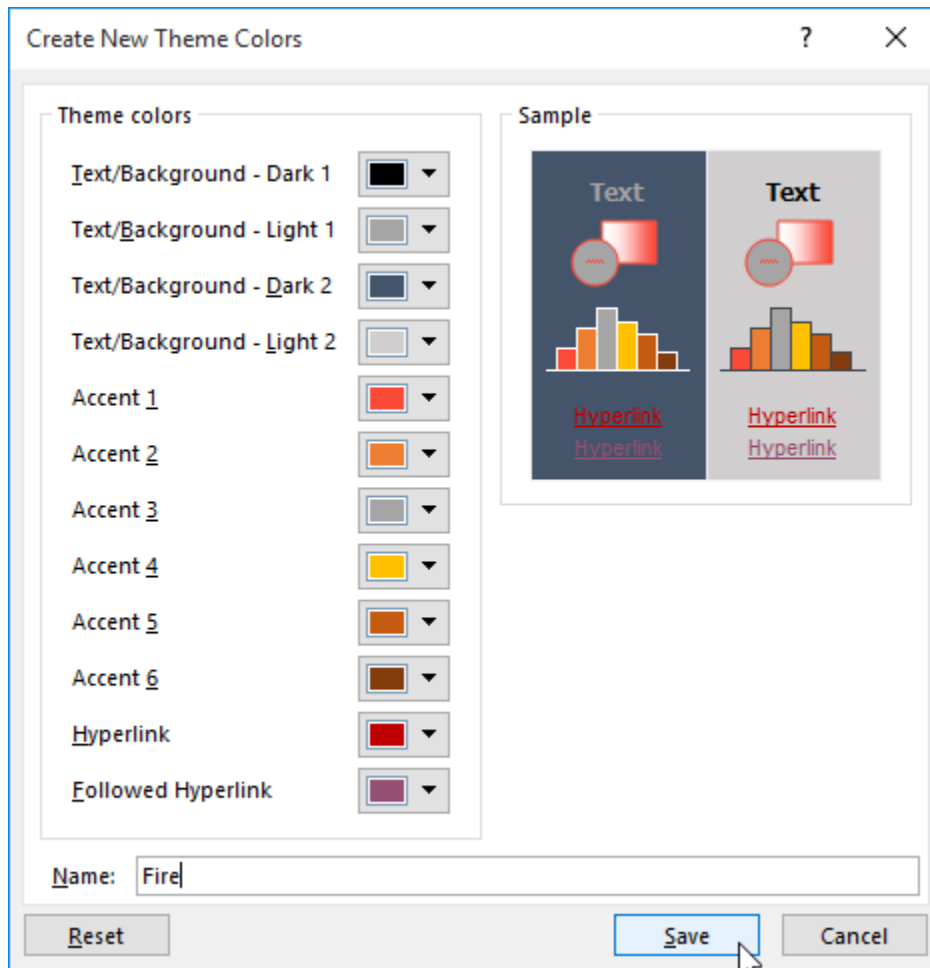


The Create New Theme Colors dialog box will open:

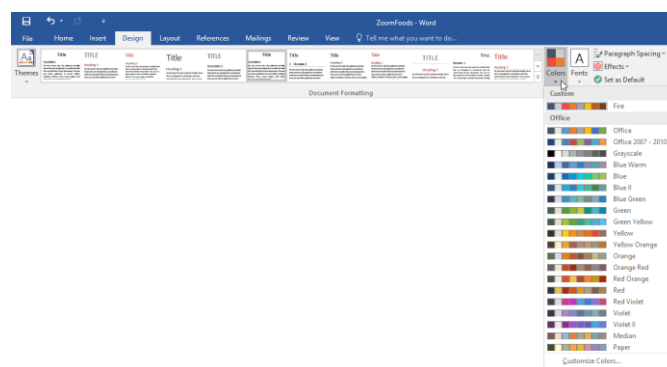


On the left-hand side, you can choose a **color for each aspect (1)** of the theme. A **preview (2)** will be shown on the right-hand side. At the bottom, you can enter a **name (3)** for the custom scheme.

Click Save when you have set your options:

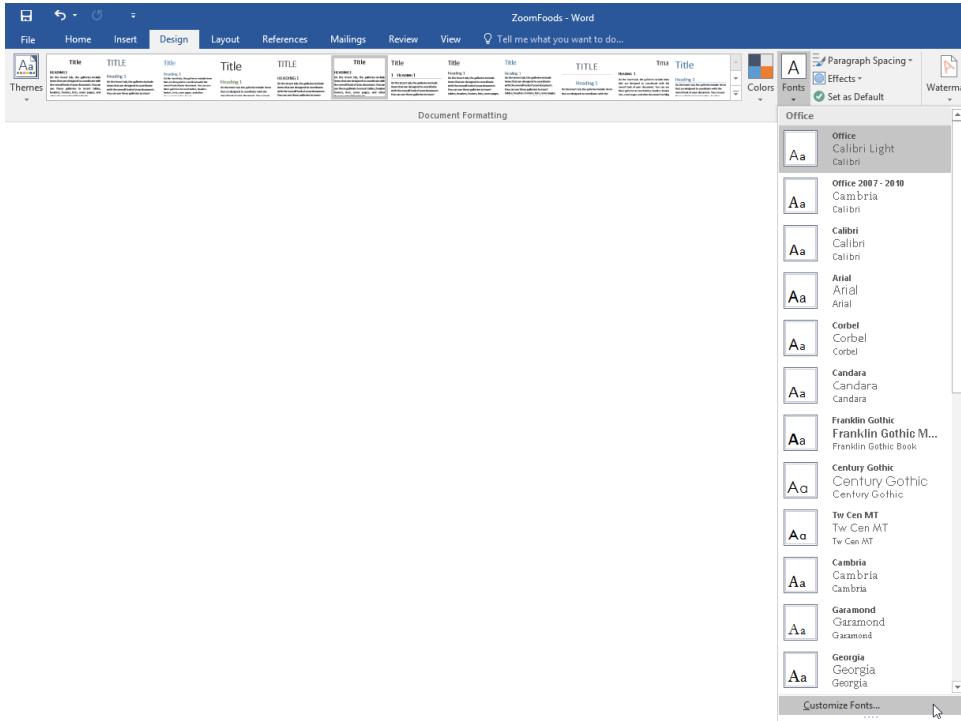


Your custom color scheme will now be applied and will be available from the Colors menu. Notice its impact on the available style sets:

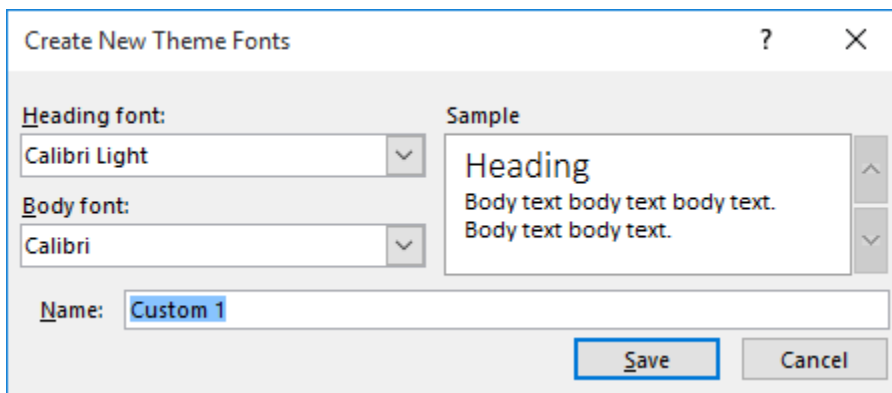


CREATING CUSTOM FONT SCHEMES

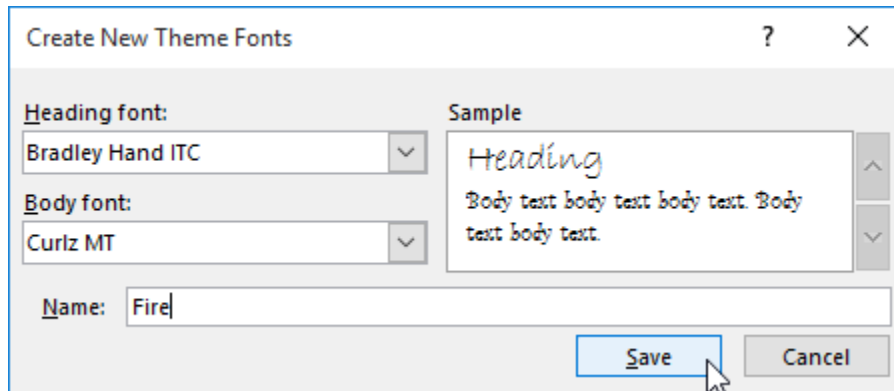
The Fonts menu also contains a command to create a custom scheme:



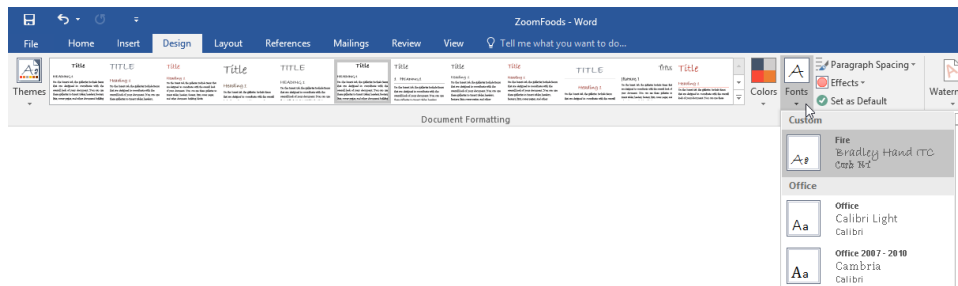
The Customize Fonts command will open the Create New Theme Fonts dialog box:



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:

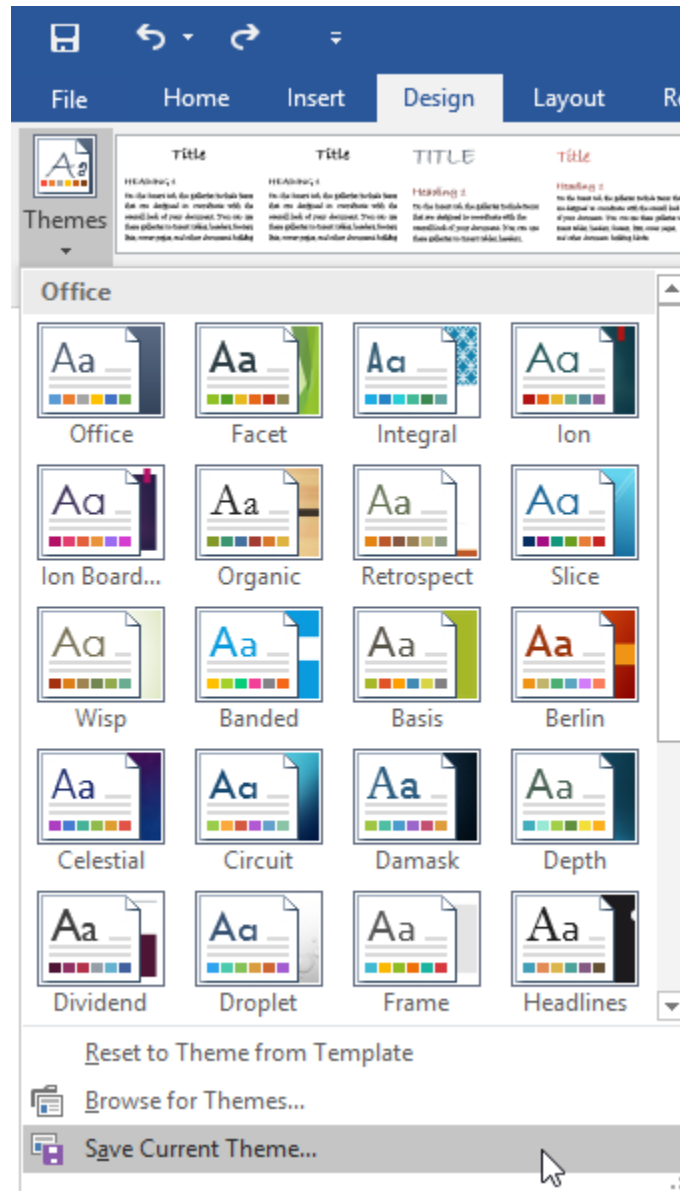


Your custom font scheme will now be applied and will be available from the Fonts menu. Notice its impact on the available style sets:

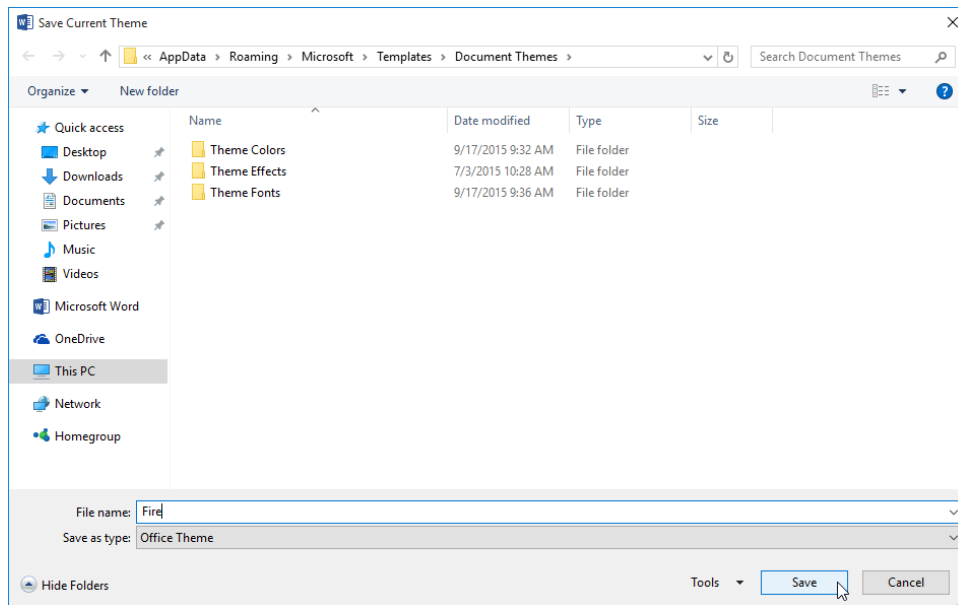


SAVING CUSTOM THEMES

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 → Themes → Save Current Theme:

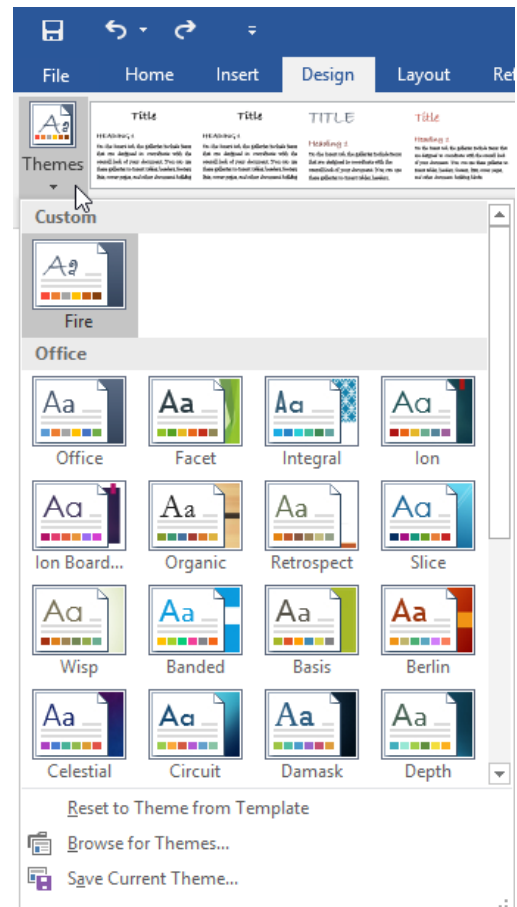


Enter the file name and click Save. Do not modify any other settings:



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.

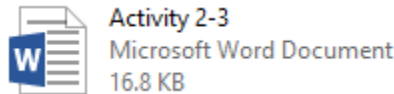


ACTIVITY 2-3

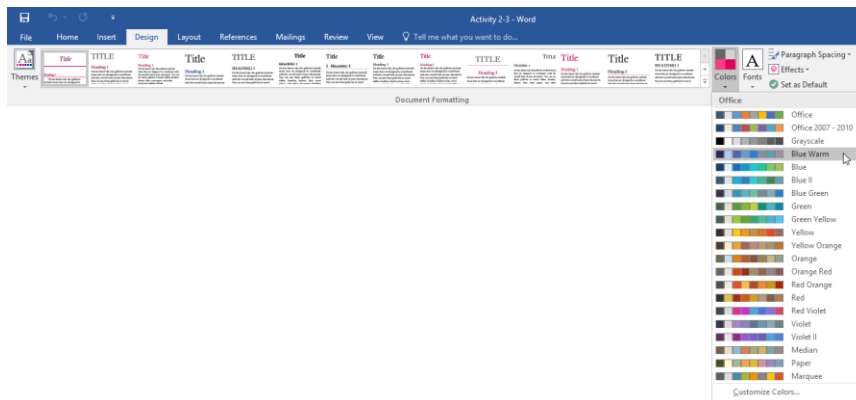
Applying and Customizing Document Themes

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

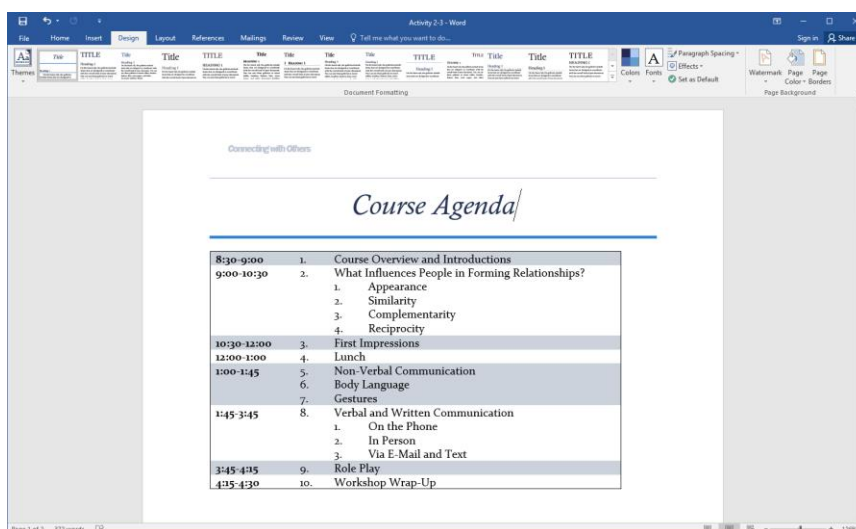
1. Open Microsoft Word 2016 and open Activity 2-3:



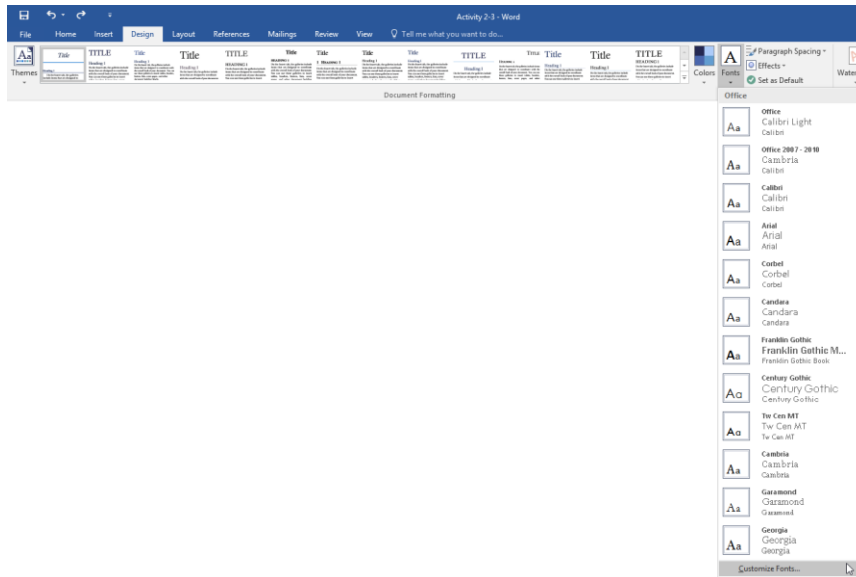
2. First, let's change the color scheme to something a bit more visually appealing. Click Design → Colors → Blue Warm:



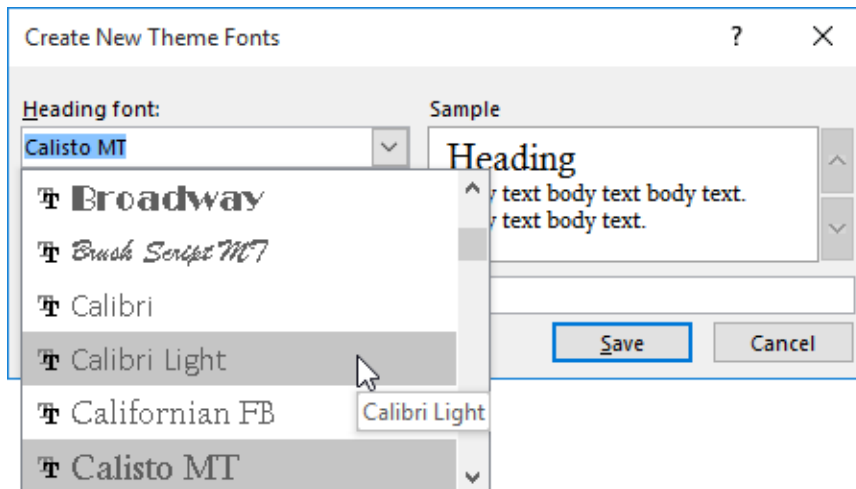
3. The color change will be applied to the document:



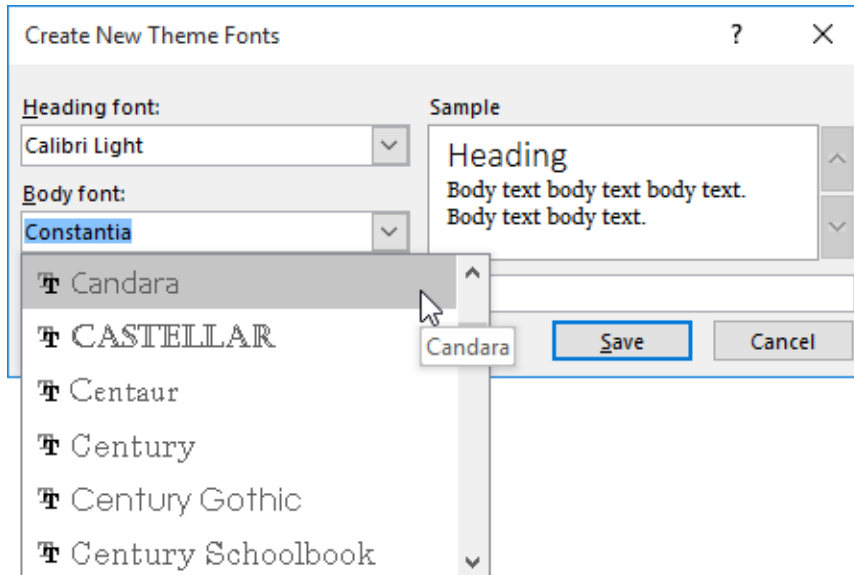
- Now, let's create a new font scheme. Click Design → Fonts → Customize Fonts:



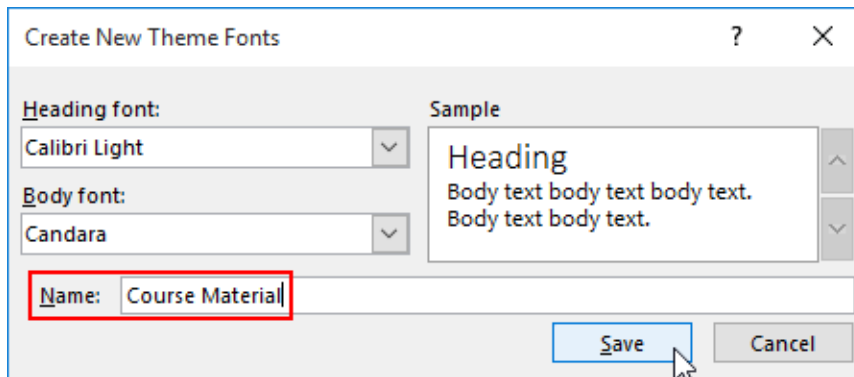
- The Create New Theme Fonts dialog box will open. Click the "Heading font" menu and click Calibri Light:



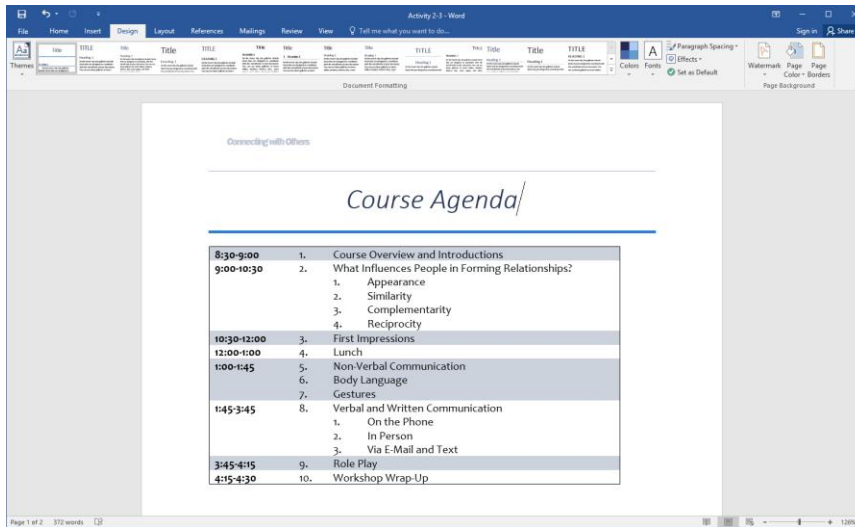
6. Click the “Body font” menu and click Candara:



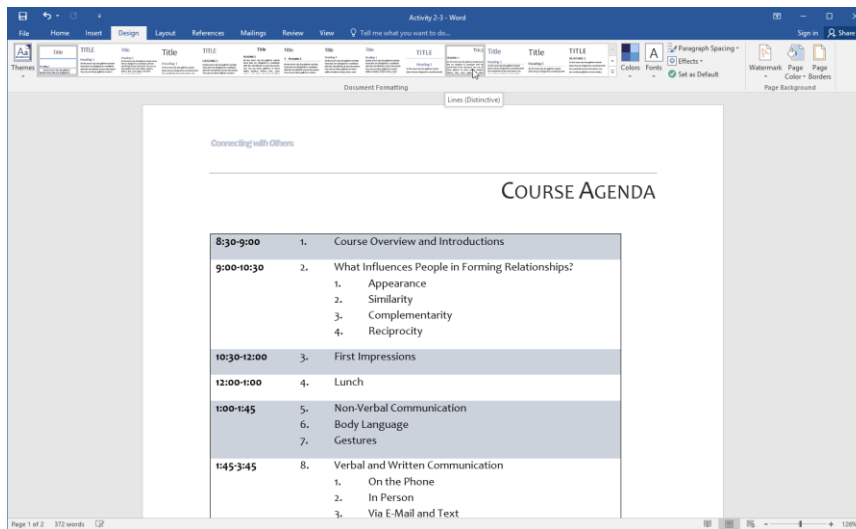
7. Type “Course Material” in the Name box and click Save:



8. The new font scheme will be saved and applied:

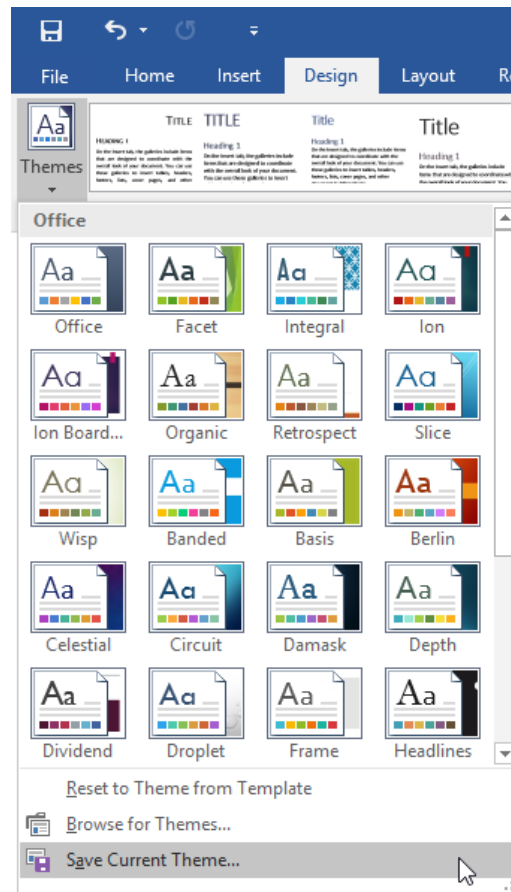


9. Now let's customize the style set. Click the "Lines (Distinctive)" style set from the Document Formatting gallery on the Design tab. Observe the changes to the document:

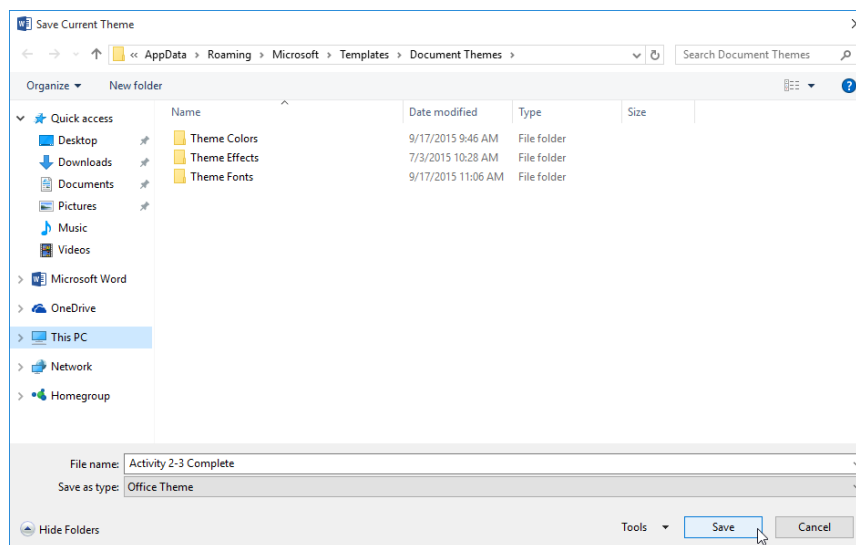


(You may need to browse through the gallery using the up and down arrows on its right-hand side to find this style set.)

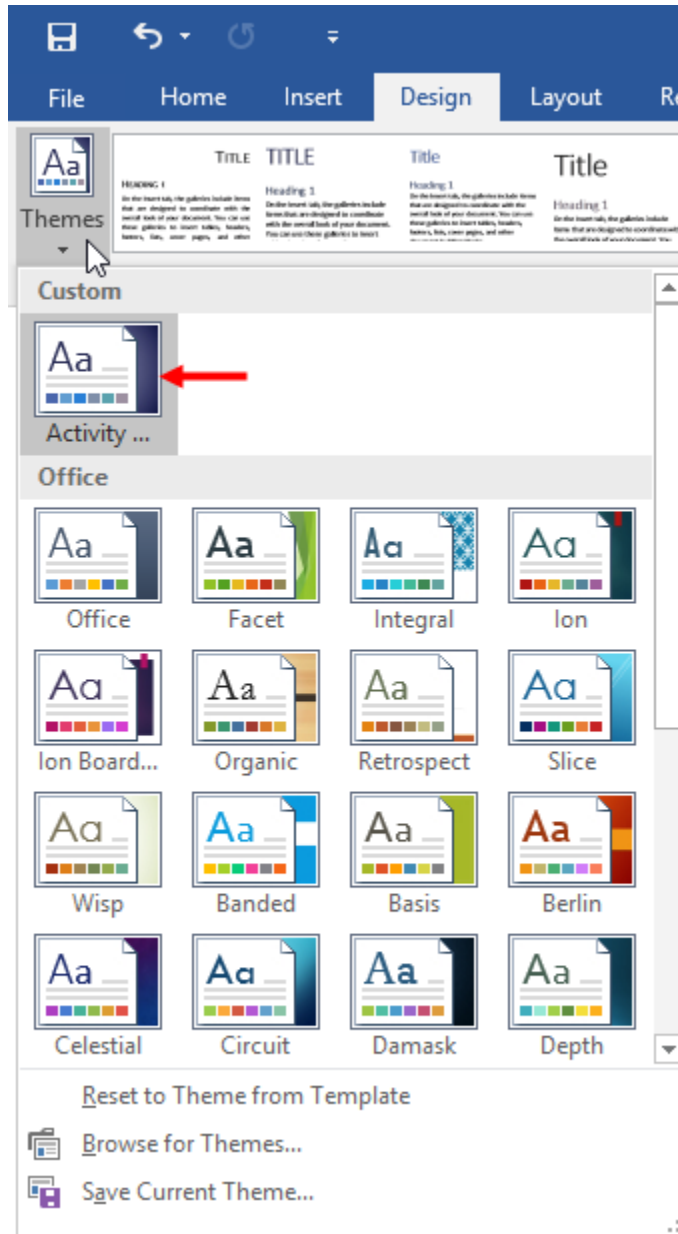
10. Now we can save the theme. Click Design → Themes → Save Current Theme:



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



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



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.

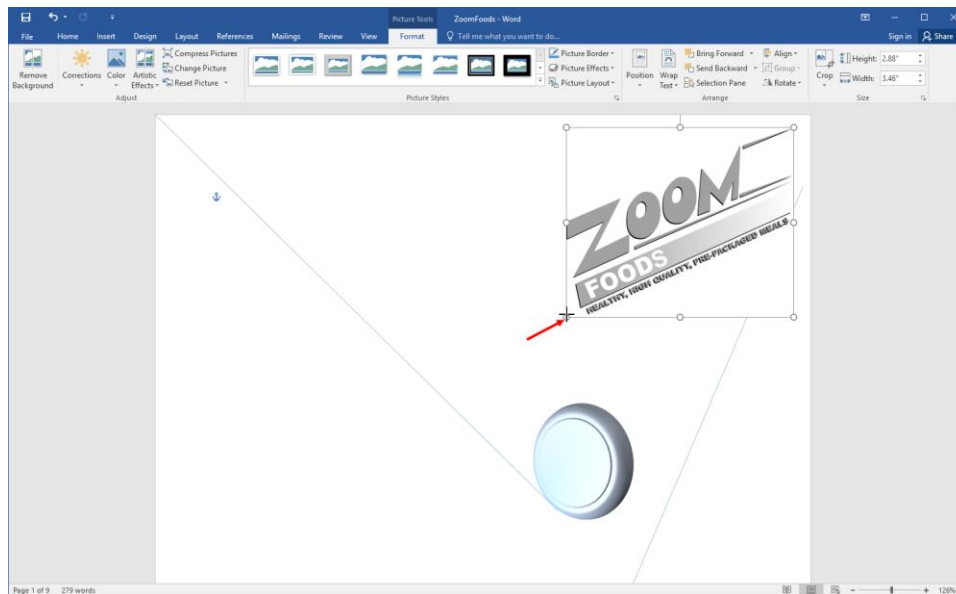
Topic Objectives

In this topic, you will learn:

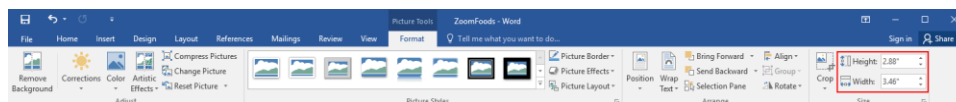
- How to resize an image
- How to crop images

RESIZING OPTIONS

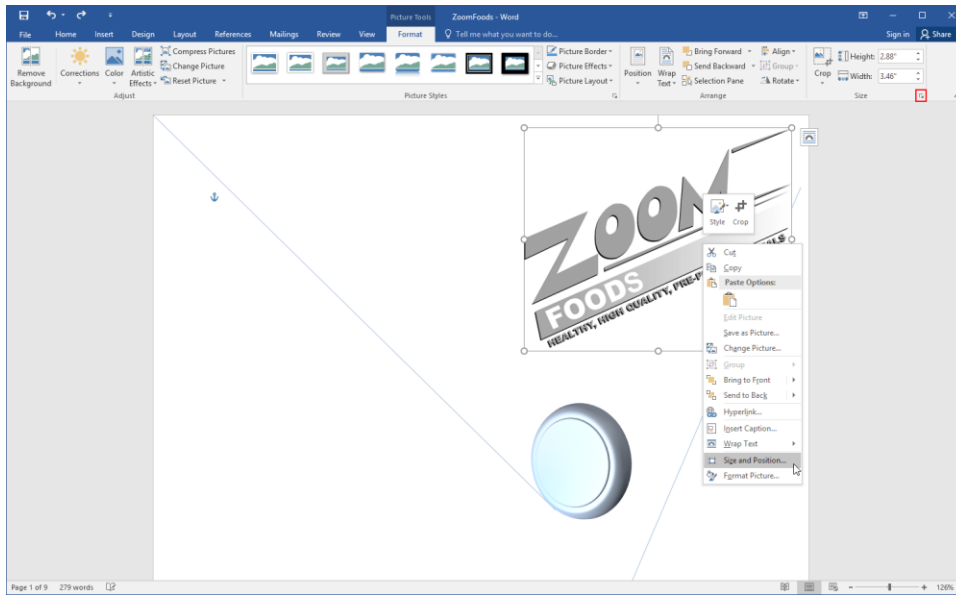
To resize a picture, first click it to select it. Then, click and drag any of the handles to resize the photo in that direction. As you drag the handles, you will see the photo become larger or smaller, depending on the direction that you drag in:



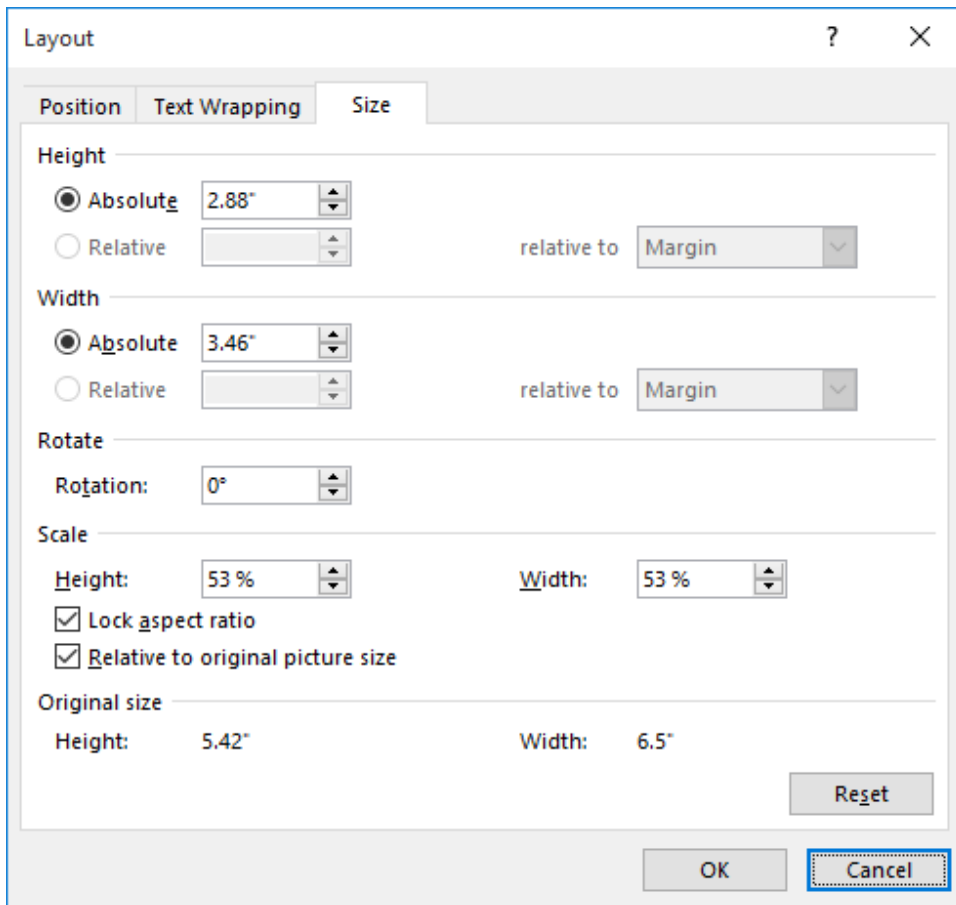
You can also enter exact dimensions in the Size group of the Picture Tools – Format tab:



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

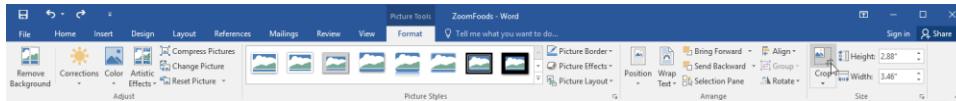


Either command will open the Size tab of the Layout dialog, offering advanced sizing and scaling options:

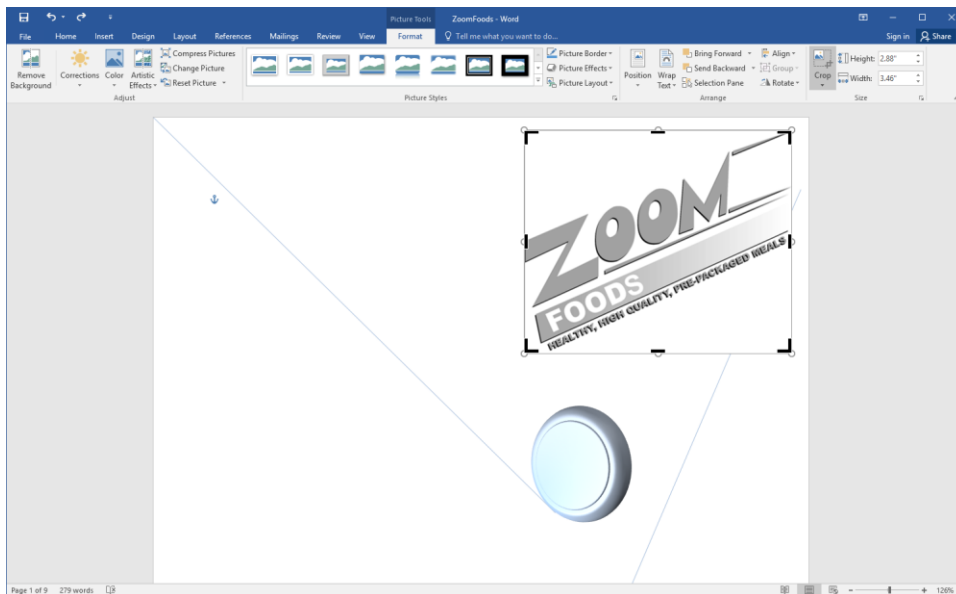


CROPPING IMAGES

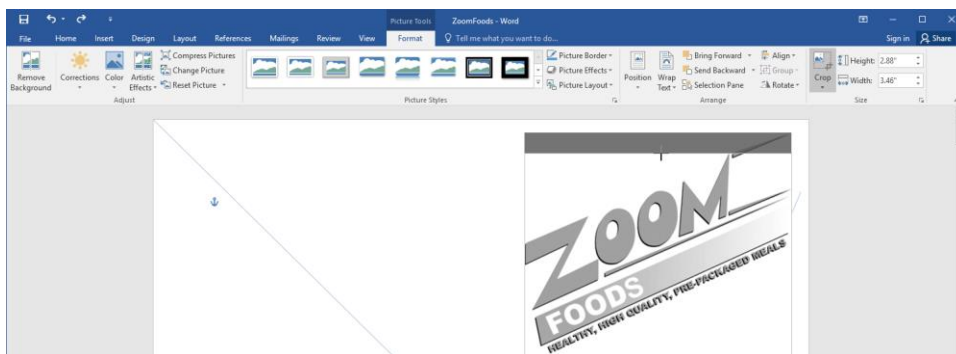
Microsoft Word also provides tools to remove areas of your photo. To start, click the picture to select it. Then click Picture Tools – Format → Crop:



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

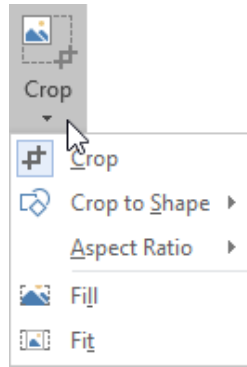


Click and drag these handles to remove part of the photo, like this:



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:

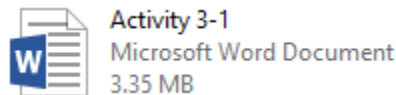
- **Crop:** Shows handles for simple cropping, which we just looked at.
- **Crop to Shape:** Allows you to pick a shape for cropping.
- **Aspect Ratio:** Crop a picture for a particular height/width ratio.
- **Fill:** Resize a picture so that the original area is filled.
- **Fit:** Make all picture content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

ACTIVITY 3-1

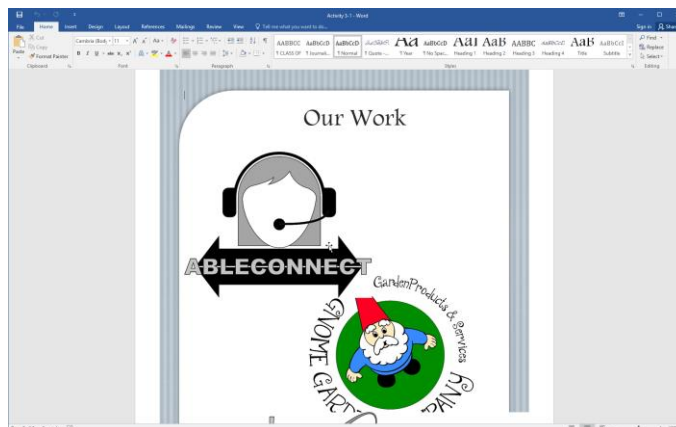
Resizing an Image

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.

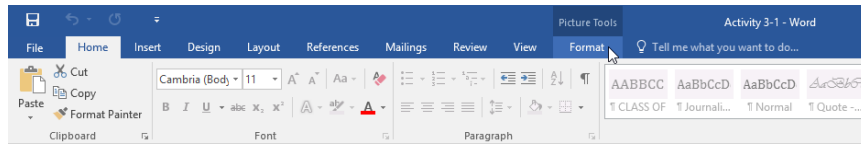
1. Open Microsoft Word 2016 and open Activity 3-1:



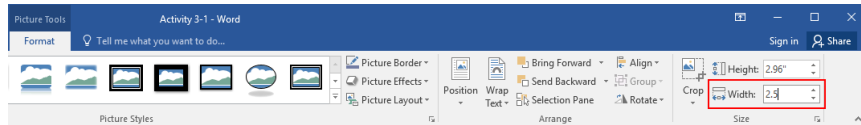
2. Scroll to the second page of the document. Click the first logo to select it:



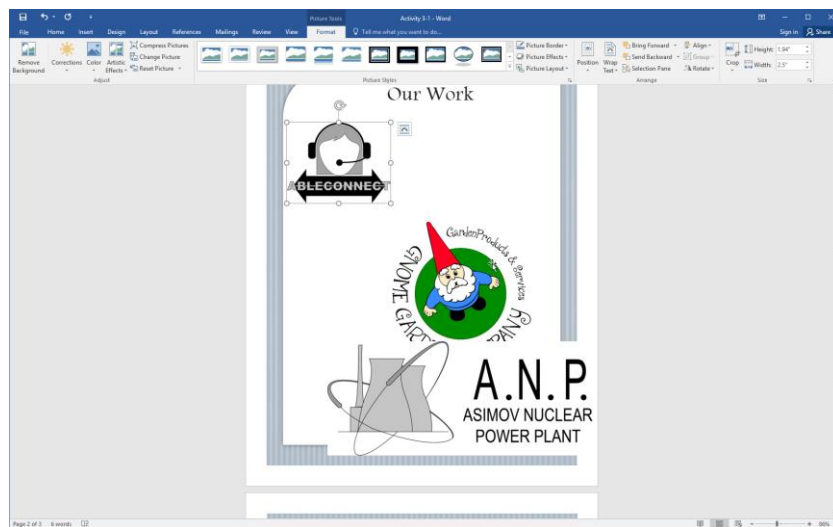
3. Click the Picture Tools – Format tab:



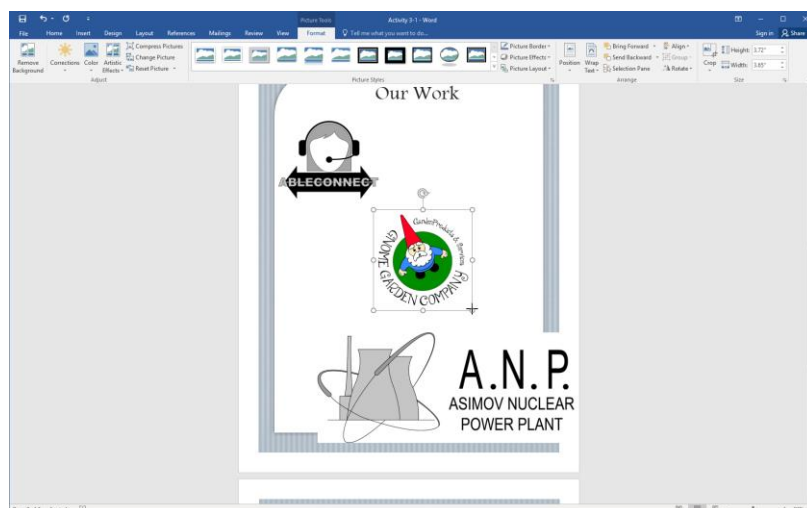
4. Type "2.5" in the Width field and press Enter:



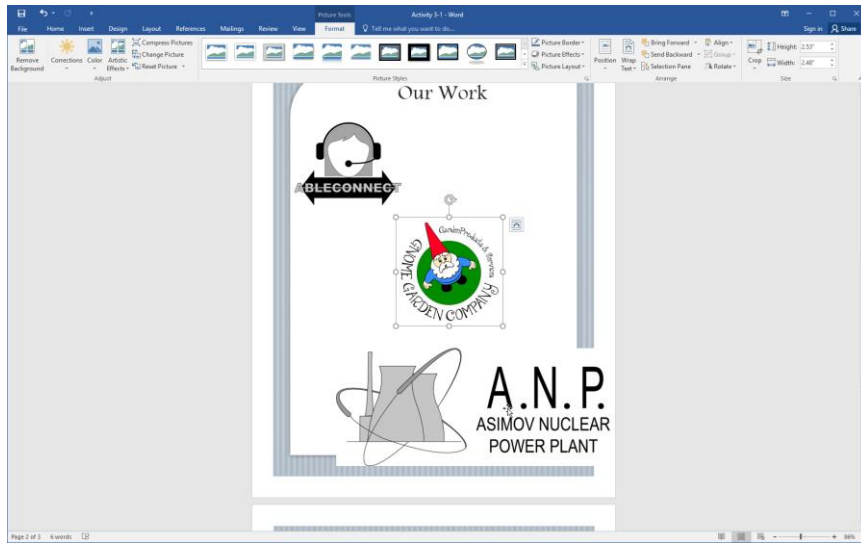
5. Click the second logo on the page:



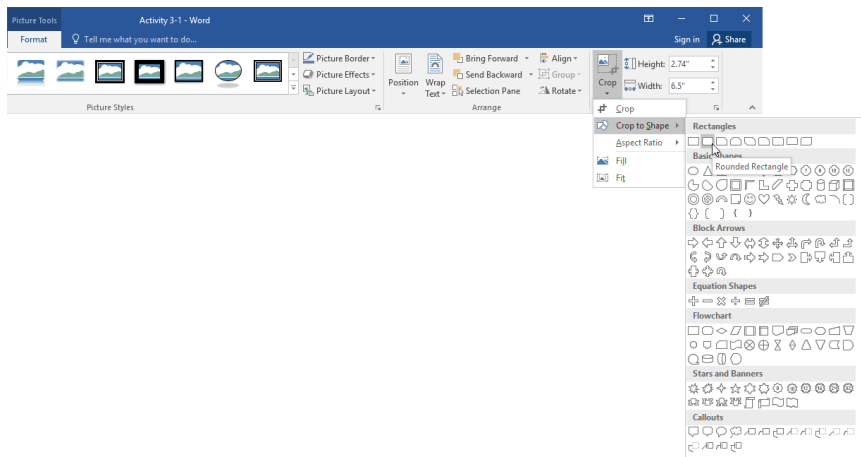
6. Click and drag the bottom right-hand corner handle up and inwards, like this:



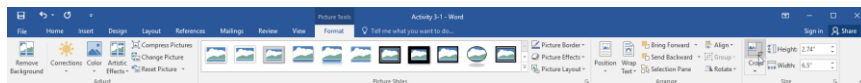
7. Now, click the final logo to select it:



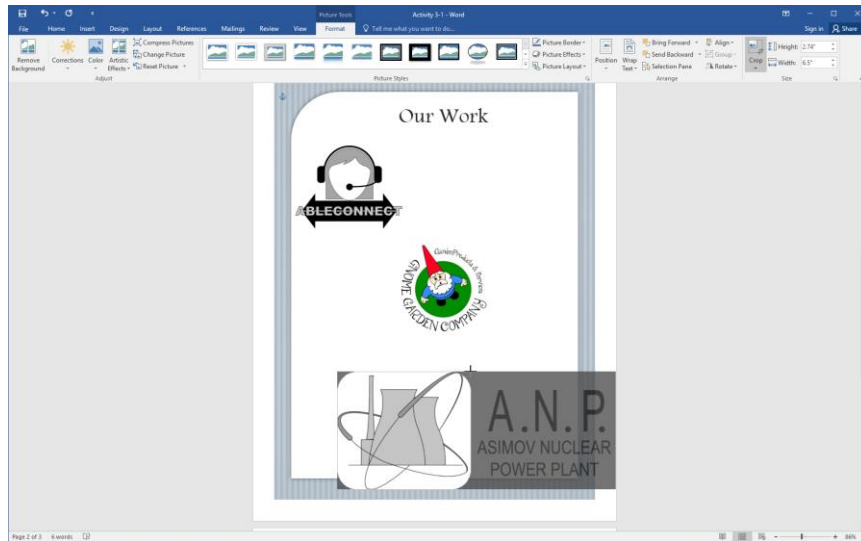
8. Click Picture Tools – Format → Crop → Crop to Shape → Rounded Rectangle:



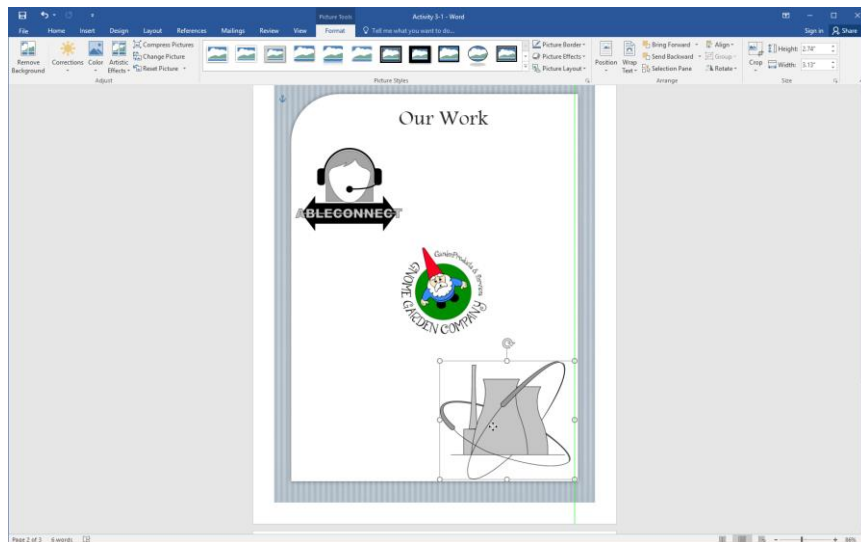
9. Click the Crop command to activate the feature:



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.

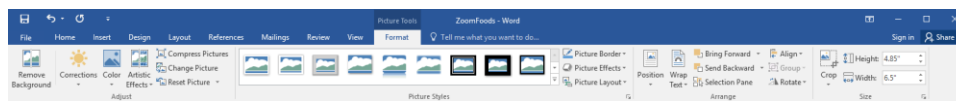
Topic Objectives

In this topic, you will learn:






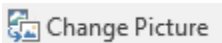
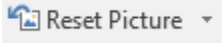
- About the commands in the Adjust group on the Picture Tools – Format tab
- How to correct an image
- How to recolor an image
- How to apply artistic effects to an image
- How to compress an image
- How to remove the background of an image
- How to apply styles to an image

THE ADJUST GROUP

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

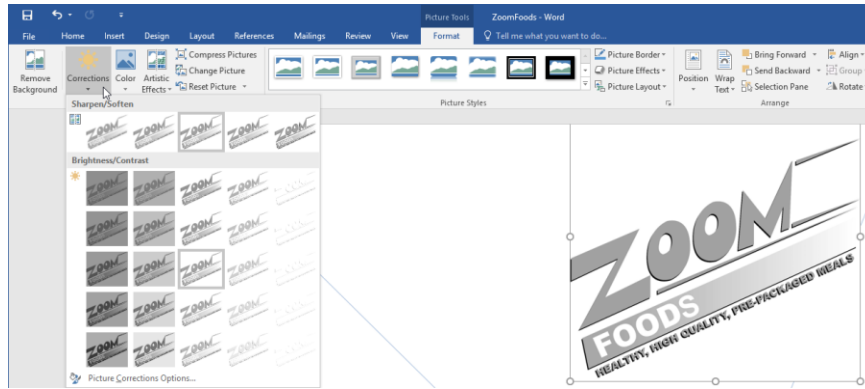


Let's review the commands in the Adjust group, which will be the focus of this topic.

 <p>Remove Background</p>	<p>Opens the Background Removal tab, which provides tools to remove parts of the picture's background.</p>
 <p>Corrections ▼</p>	<p>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.</p>
 <p>Color ▼</p>	<p>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.</p>
 <p>Artistic Effects ▼</p>	<p>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.</p>
 <p>Compress Pictures</p>	<p>Opens the Compress Pictures dialog, where you can set the target resolution in pixels per inch for the current photo or all photos.</p>
 <p>Change Picture</p>	<p>Swap the current photo for another photo, preserving the size, location, and some formatting options.</p>
 <p>Reset Picture ▼</p>	<p>Remove any formatting applied to the picture. Or, click the drop-down arrow to reset both formatting and size.</p>

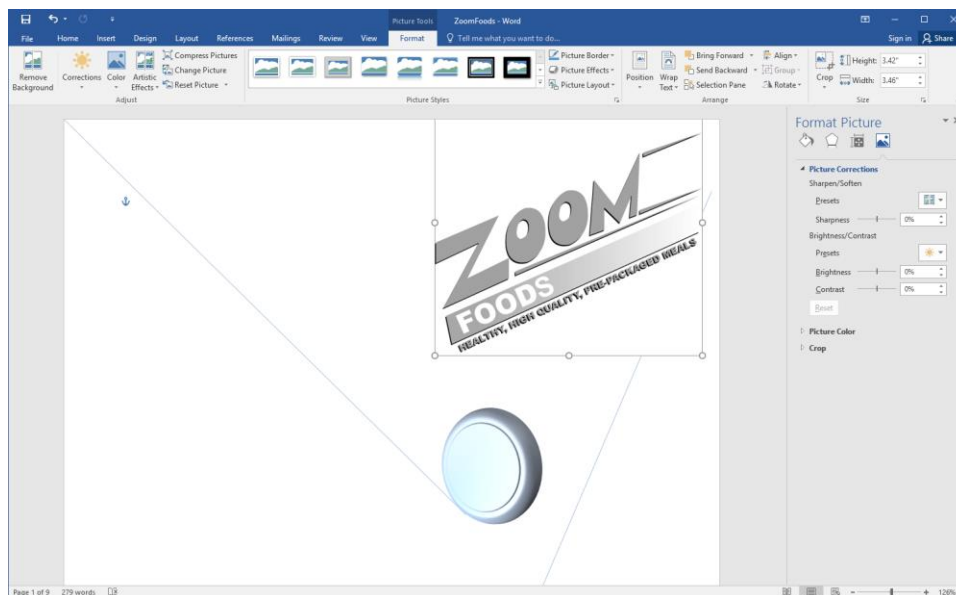
CORRECTIONS OPTIONS

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:



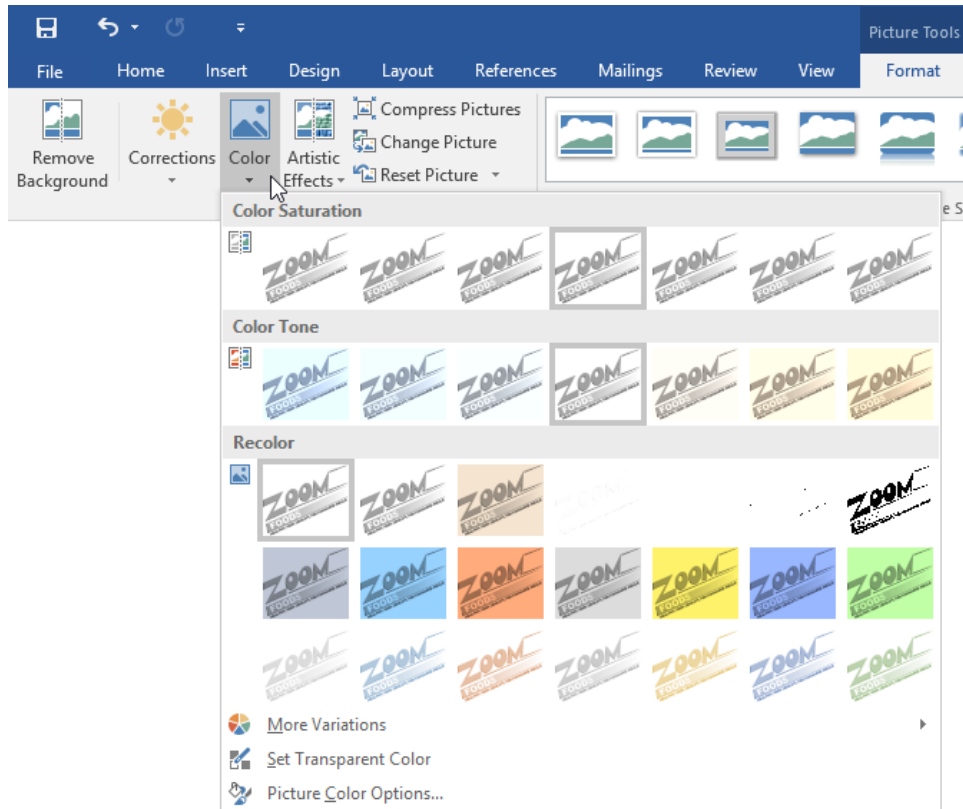
Notice that you can choose a preset for each category or use the slider to manually set each option. There is also a Reset command that will become available after you make changes.

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.

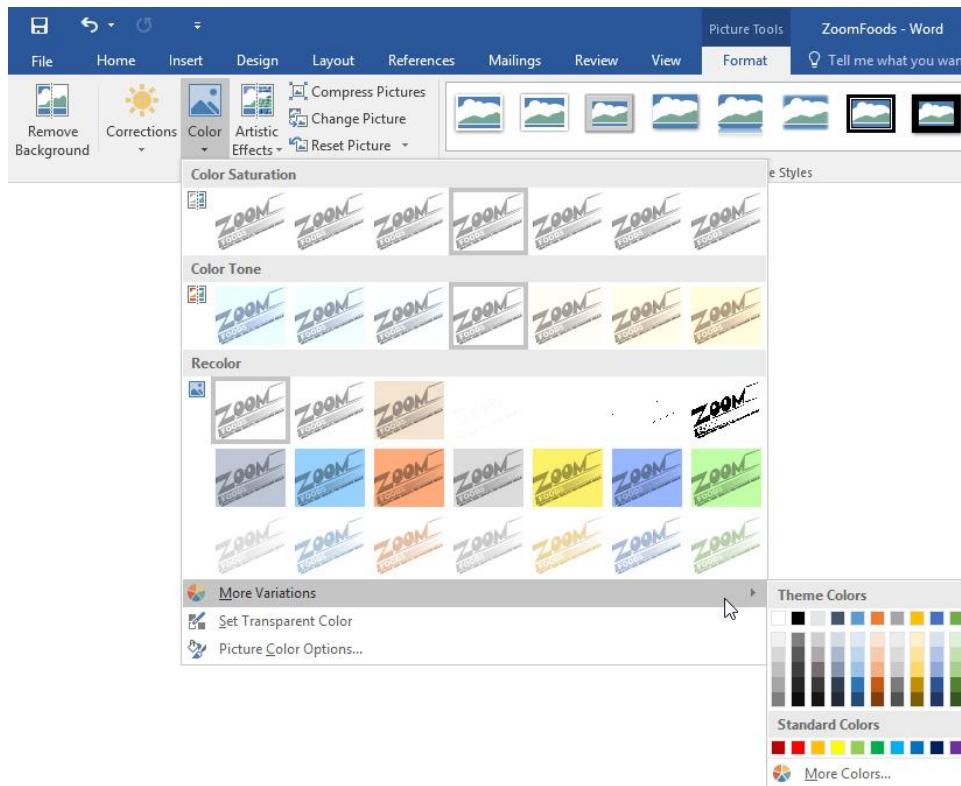
COLOR OPTIONS

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

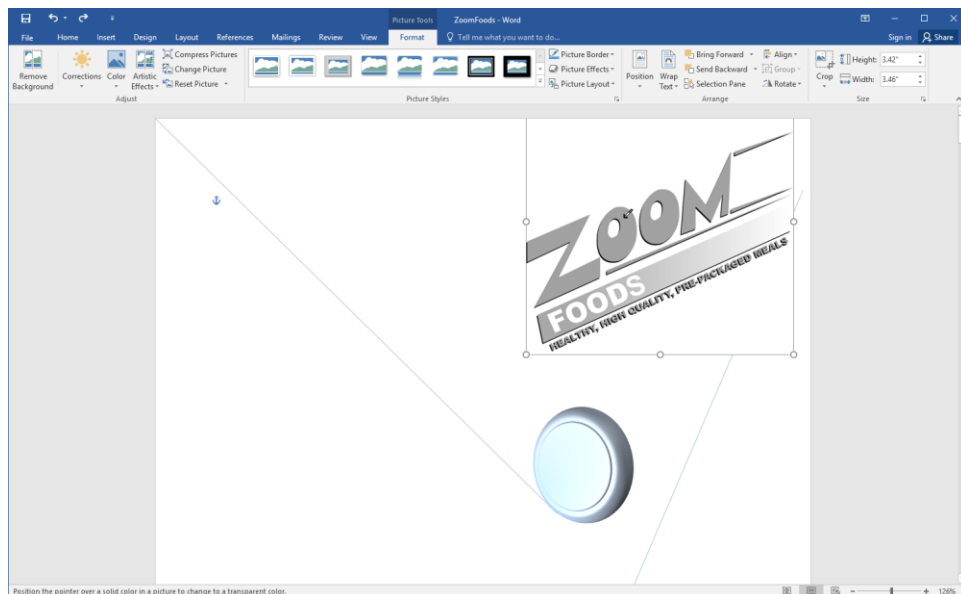


Once again, we have several categories of presets, including Color Saturation, Color Tone, and Recolor. You can click any of the presets to apply them; the current presets have borders surrounding them.

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



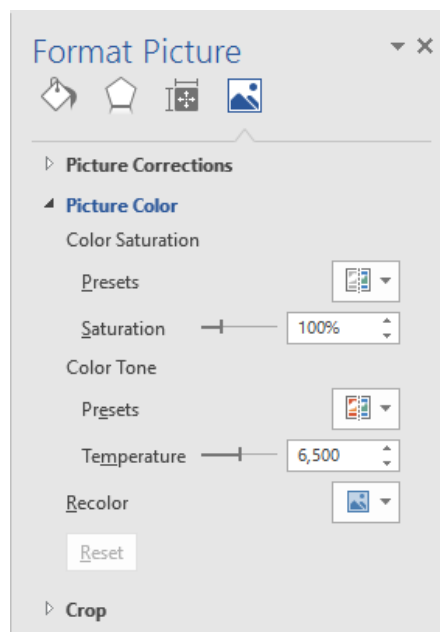
The next option in the Color menu, **Set Transparent Color**, will allow you to mark a color to be made transparent for the whole image. Here, we have clicked the Set Transparent Color command and are selecting a shade of gray to be made transparent:



Here are the results:



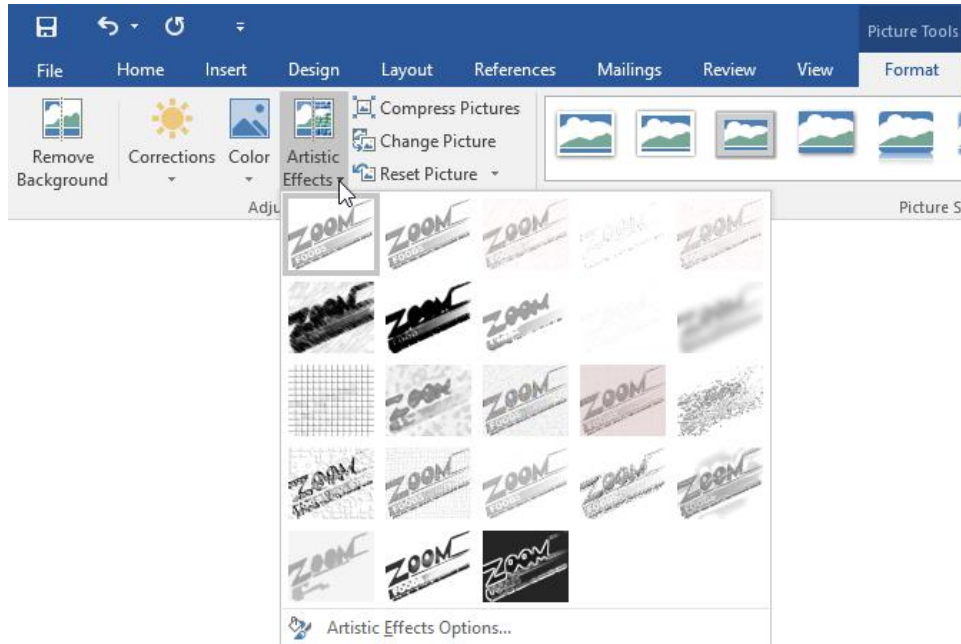
Finally, you can click the Picture Color Options command at the bottom of the menu to open the Format Picture task pane to the Picture Color sub-category of the Picture category:



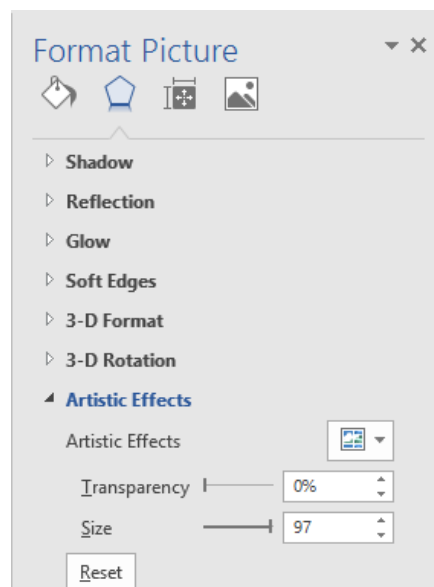
This task pane provides much finer control over saturation, tone, and color options. You will also find a Reset command to reverse any changes that you have made to the currently selected preset.

ARTISTIC EFFECTS OPTIONS

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



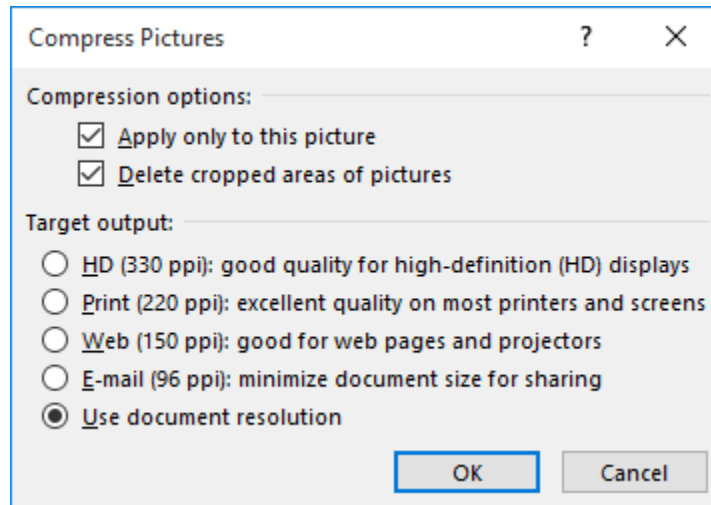
Just click a preset to apply it. Or, click the Artistic Effects Options command at the bottom of the menu to open the Format Picture task pane to the Artistic Effects sub-category of the Effects category:



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:

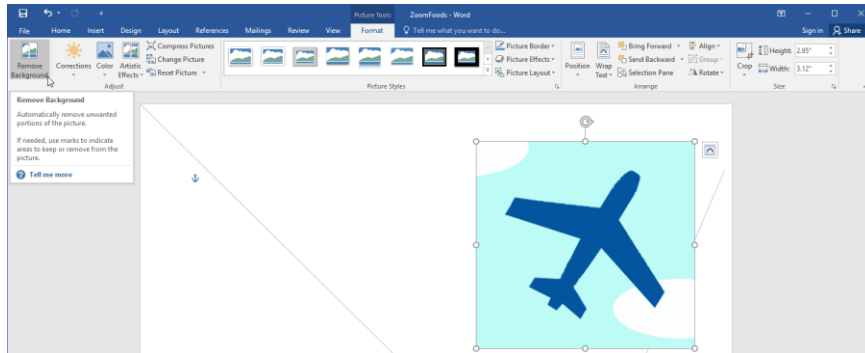


The first option indicates that these options will **apply only to this picture**; uncheck it if you want these settings to apply to all photos in the document. The second option allows Word to **delete cropped areas** of pictures. (If you've finished editing a picture, this is a good way to trim down the size of a file.)

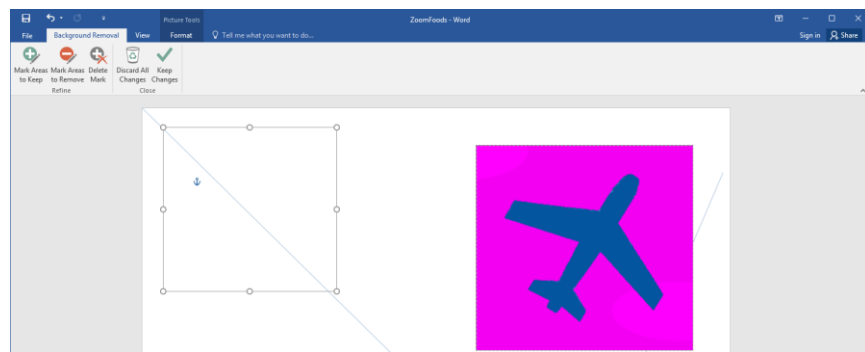
Then, you have options to **set the resolution** of the pictures in the document. Normally, you won't need to change these settings, but they can be useful if you need to reduce a document's size to e-mail it. Once you've set your options, click OK to apply the settings or click Cancel to discard them.

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:

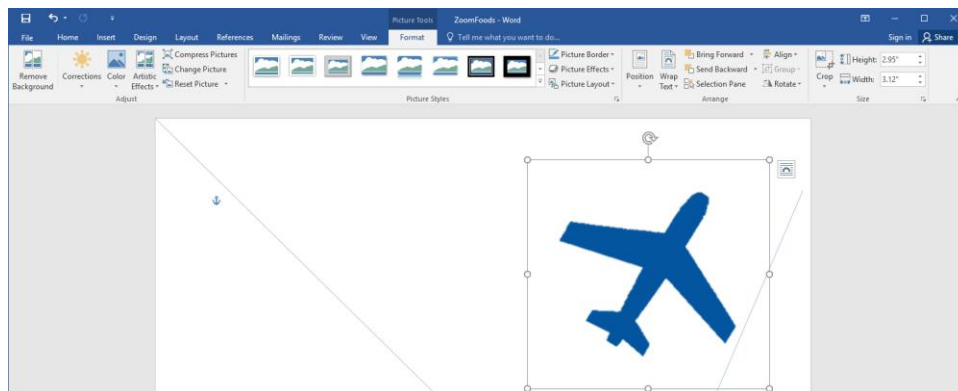


This will highlight the background area to be removed in pink and open the Background Removal tab:



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.

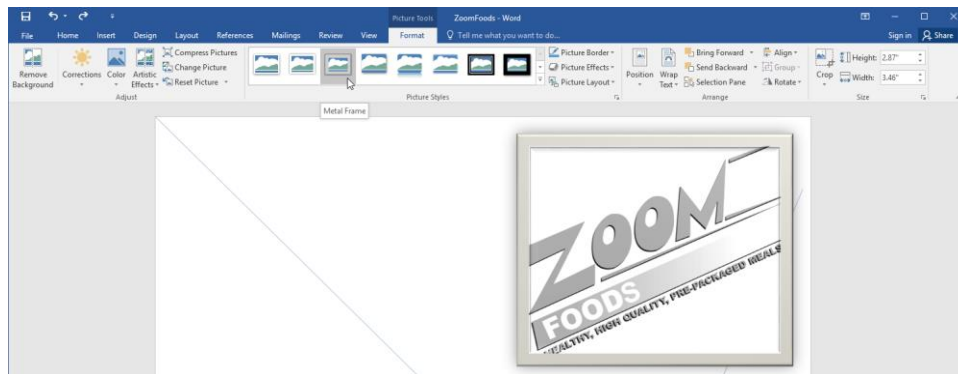
Once you have finished, click the Keep Changes command. Here is the final result:



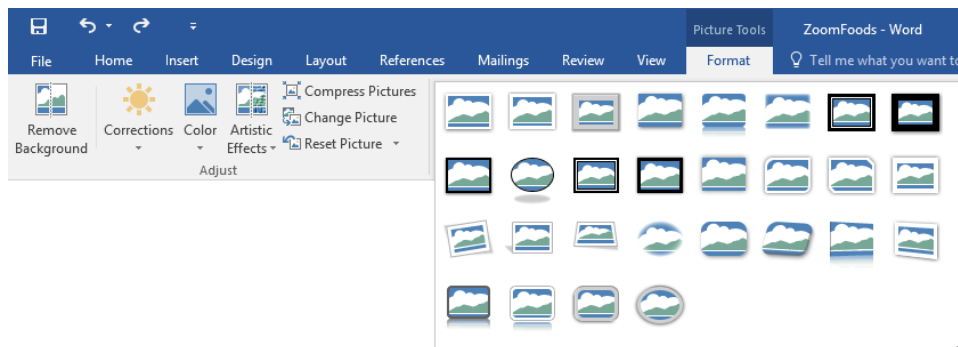
APPLYING PICTURE STYLES

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.

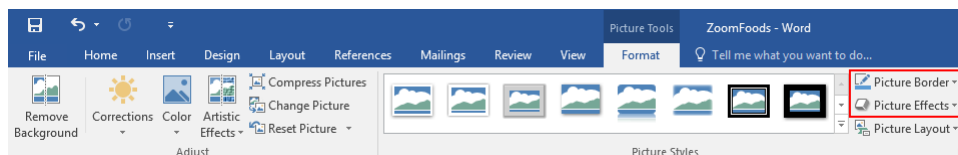
You will see a preview of the style applied to the photo as you mouse over each thumbnail:



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



Last but not least, you can use the menus to the right of the gallery to customize the current style:



ACTIVITY 3-2

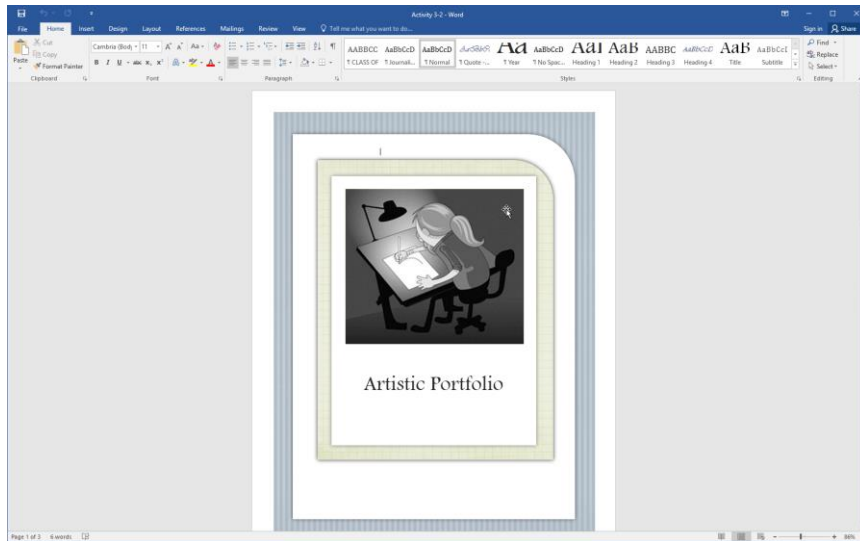
Adjusting Image Appearance

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

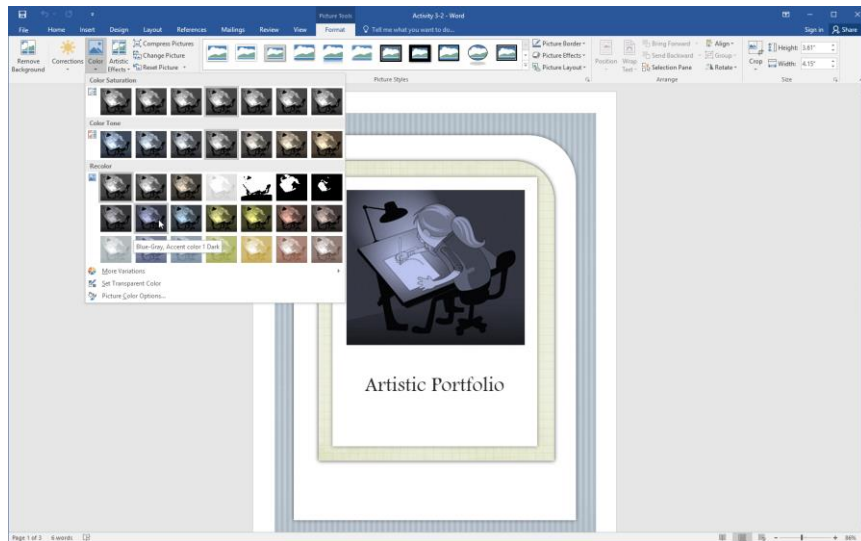
1. Open Microsoft Word 2016 and open Activity 3-2:



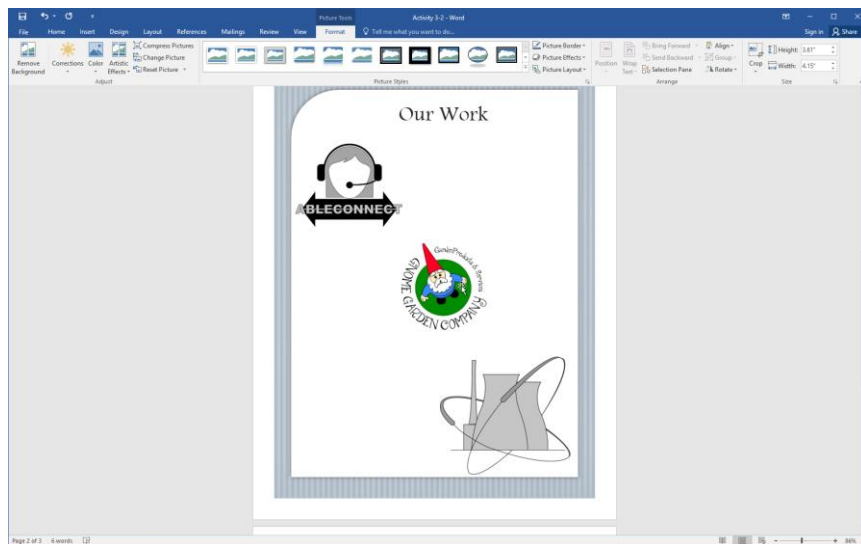
2. Click the image on the first page of the document to select it:



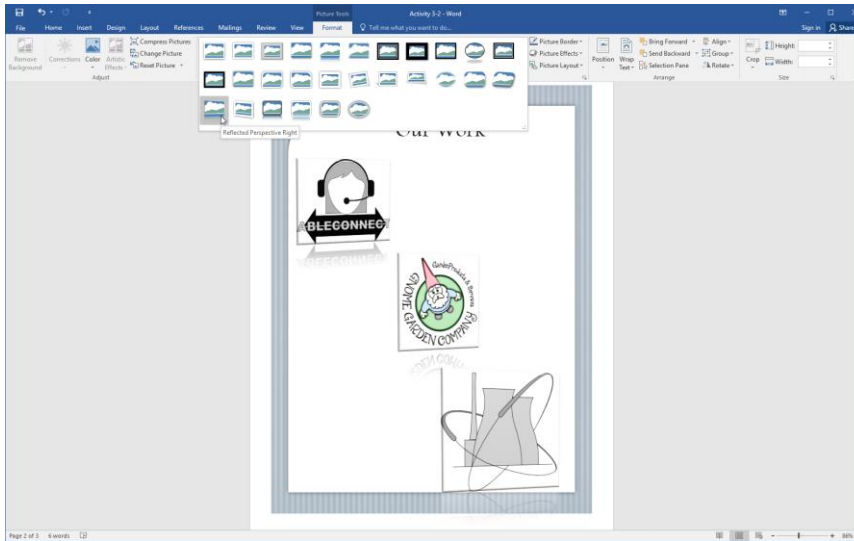
3. Click Picture Tools – Format → Color. Choose a color that complements the rest of the title page:



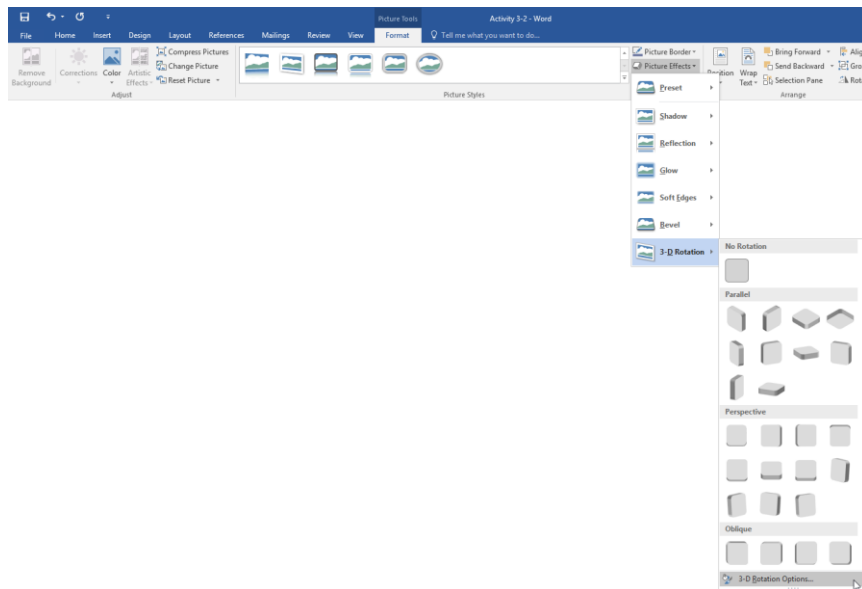
4. Scroll to the second page of the document. Click the second logo:



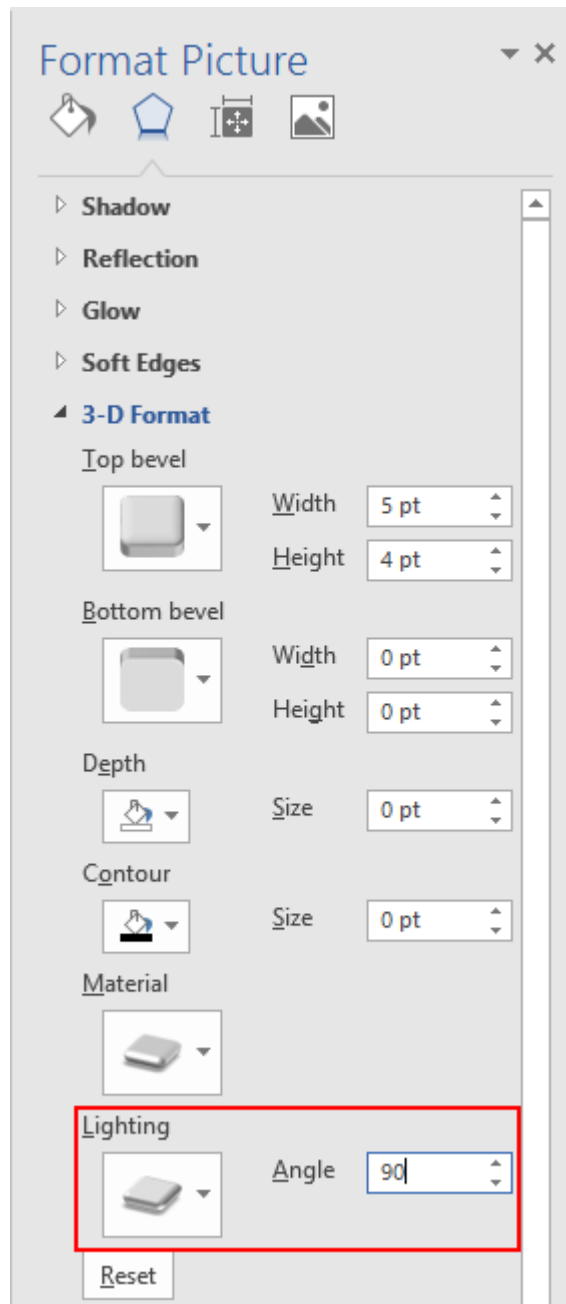
8. Move your mouse over some different styles to see how they will look. When you are finished, click “Reflected Perspective Right.”



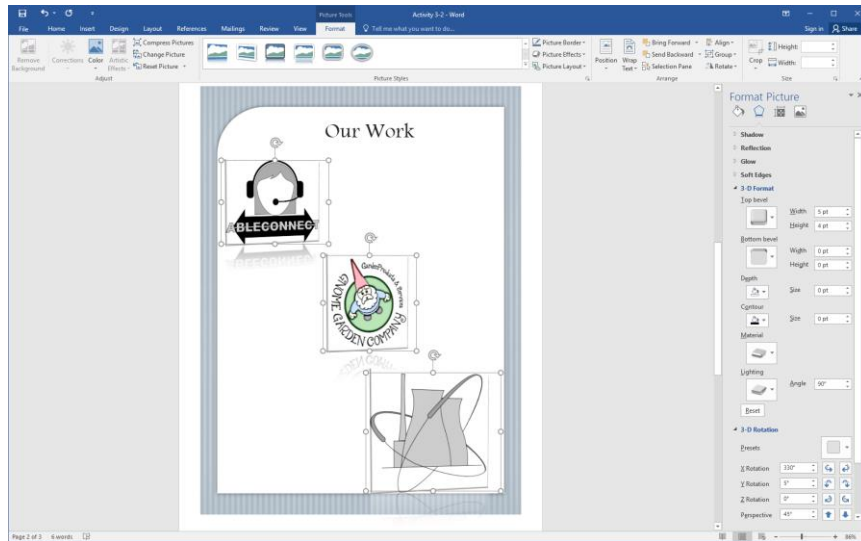
9. Now, let's customize this style. With all three images still selected, click Picture Tools – Format → Picture Effects → 3-D Rotation → 3-D Rotation Options:



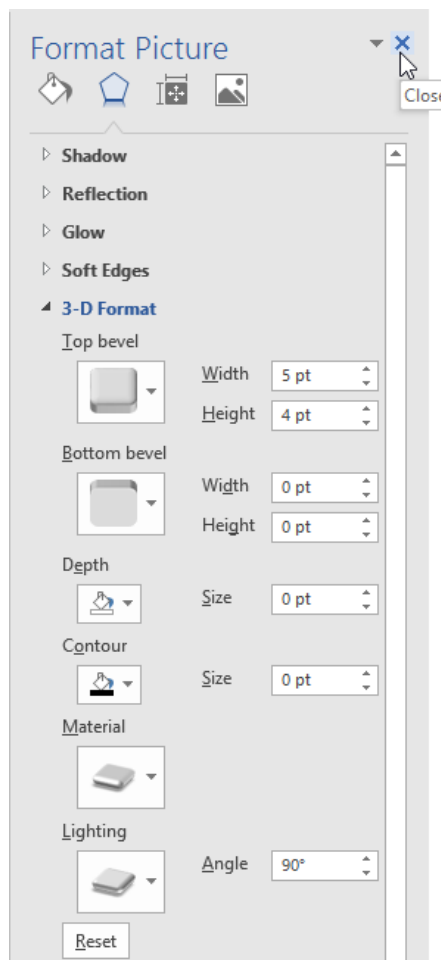
10. The Format Picture task pane will open to the Effects category with both the 3-D Format and 3-D Rotation sub-categories expanded. (If one of these categories is not expanded, click its name to see its options.) Change the value in the Lighting – Angle field to 90:



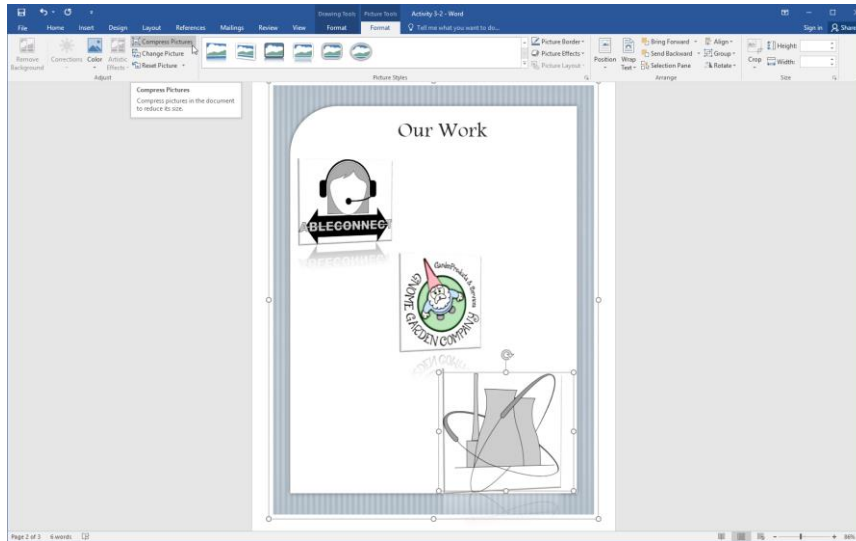
11. How has this change affected the logos?



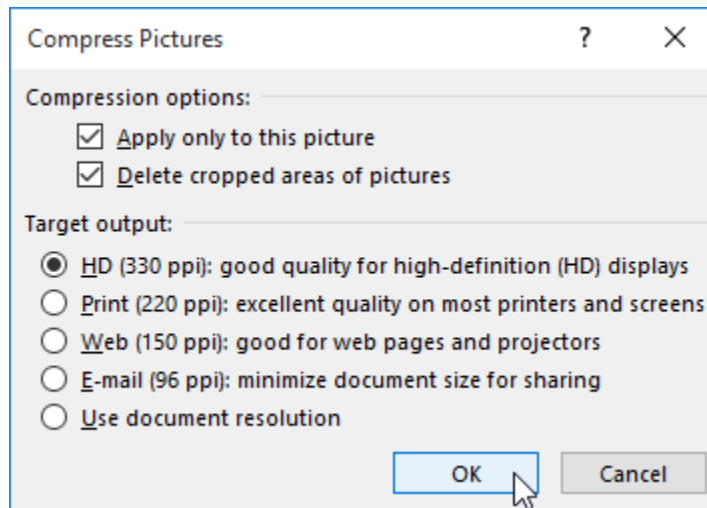
12. Close the Format Picture task pane:



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:



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.

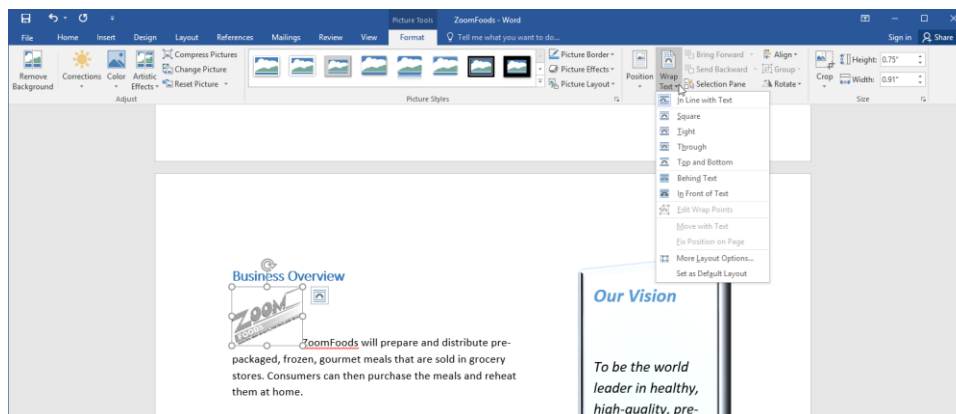
Topic Objectives

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

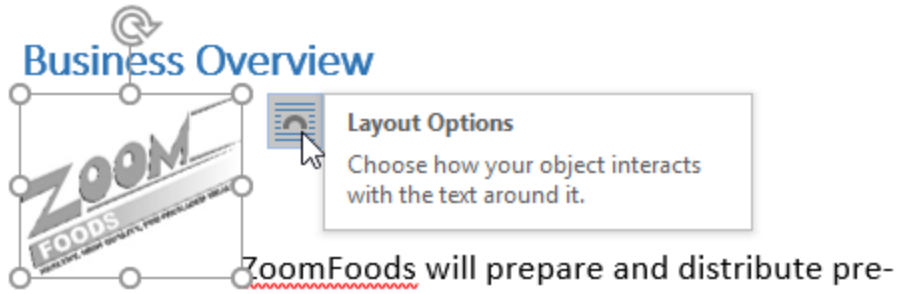
TEXT WRAPPING STYLES

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 → Wrap Text:

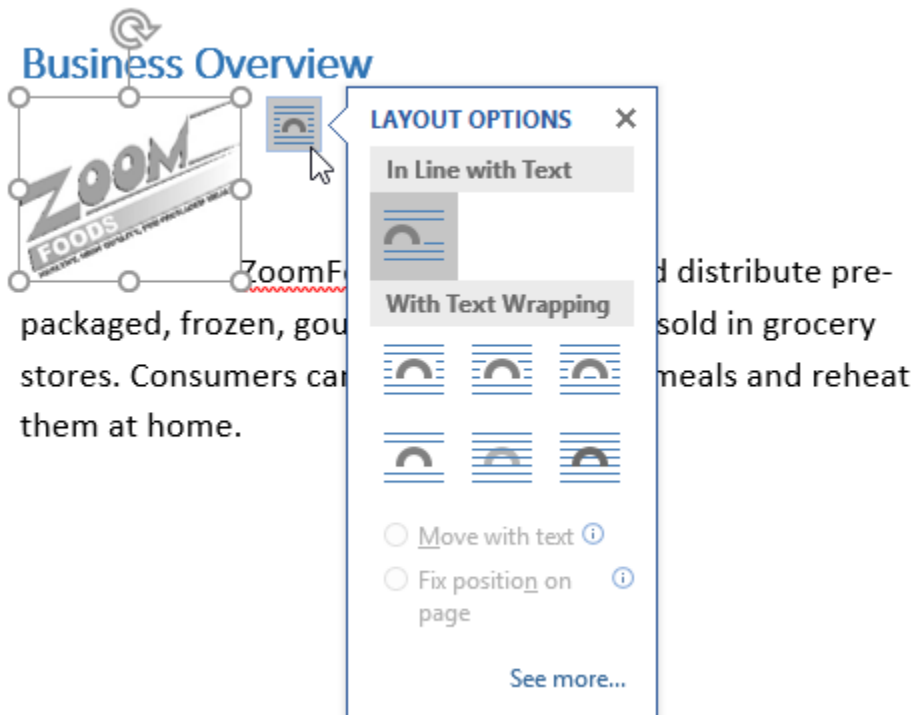


You will see a menu of wrapping styles; just click the style that you want to apply. Each option’s icon shows a small preview of what the image and text will look like. The icon for the current text wrapping method will be highlighted, and new options will be previewed as you mouse over them. (Note that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

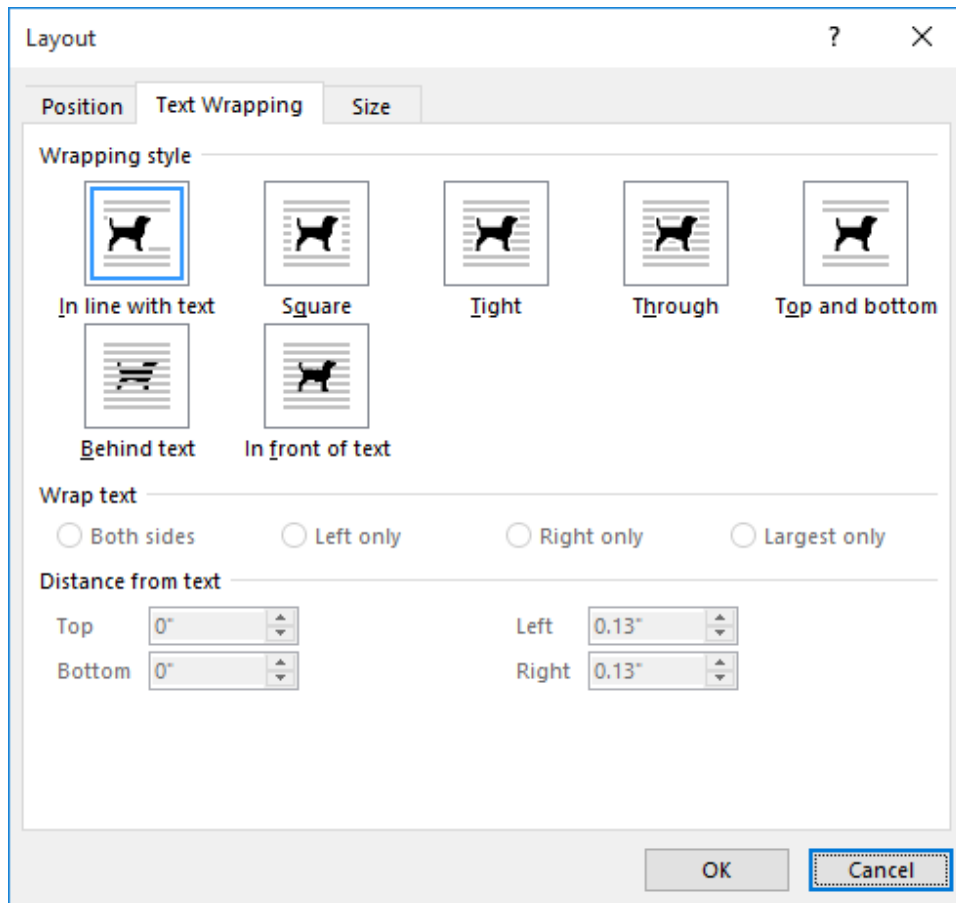
A quicker way to access these options is to click the Layout Options button next to a selected image:



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

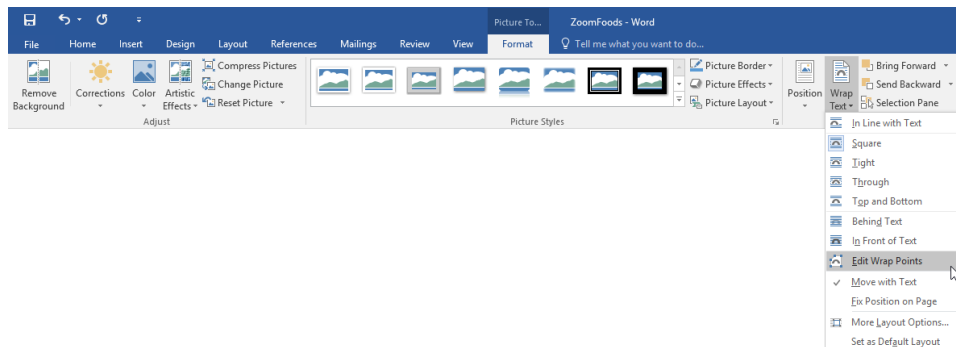


The More Layout Options command in the Wrap Text menu (and the “See more” link in the Layout Options pane) will open the Layout dialog, where you can access advanced text wrapping and position options:

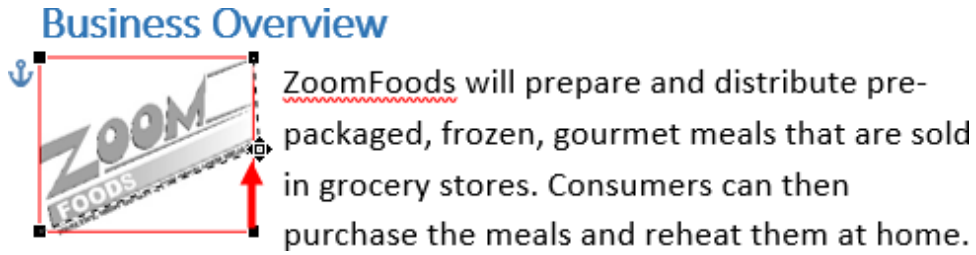


Configuring Wrap Points

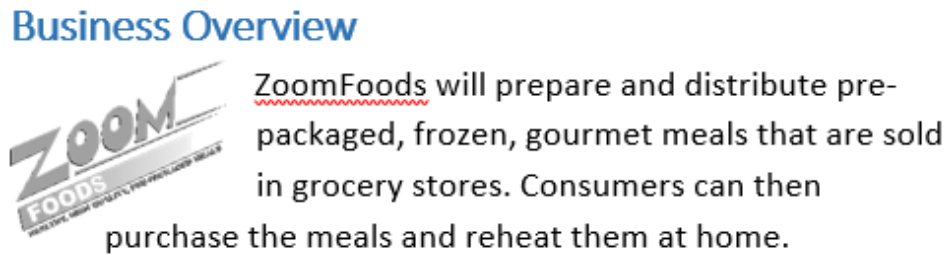
To customize exactly how text wraps around the image, click Picture Tools – Format → Wrap Text → Edit Wrap Points:



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

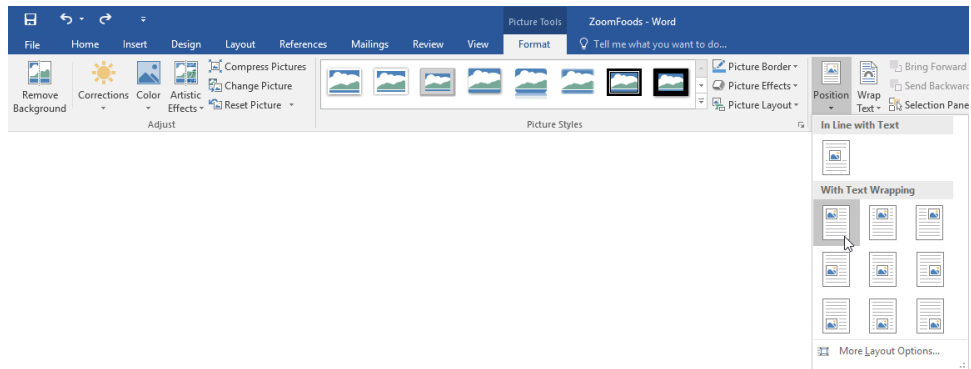


Here are the results of this change:

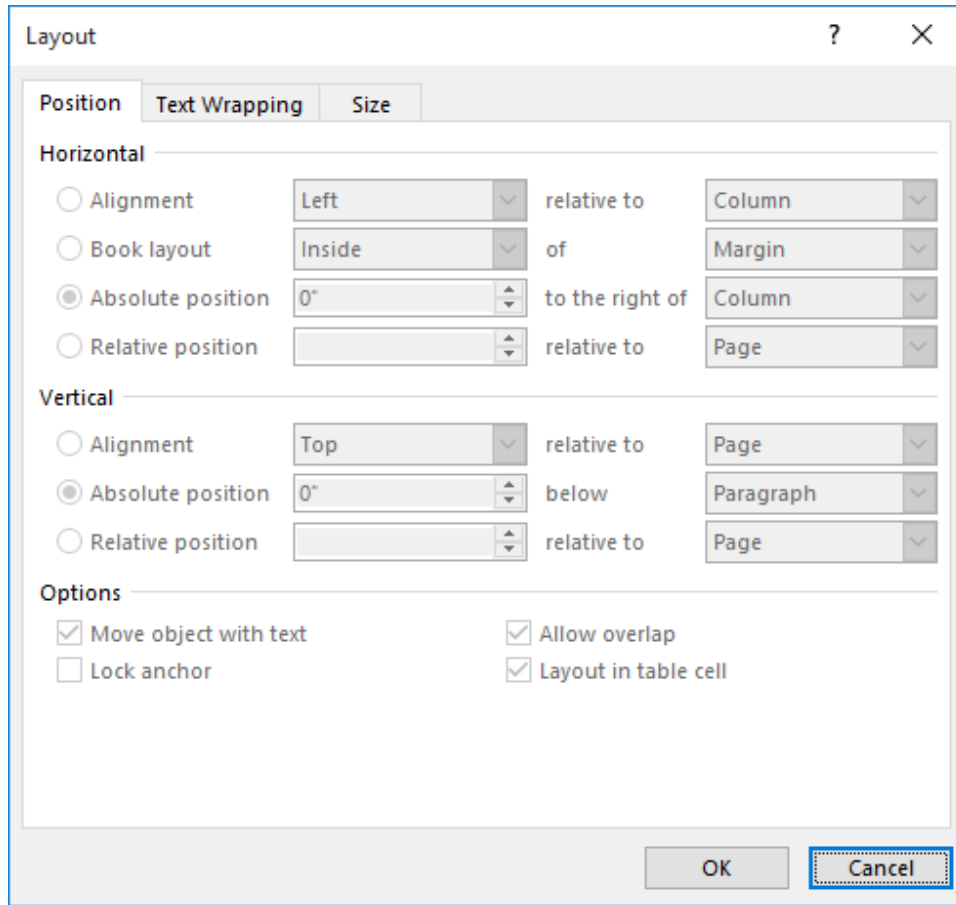


PICTURE POSITIONING OPTIONS

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:



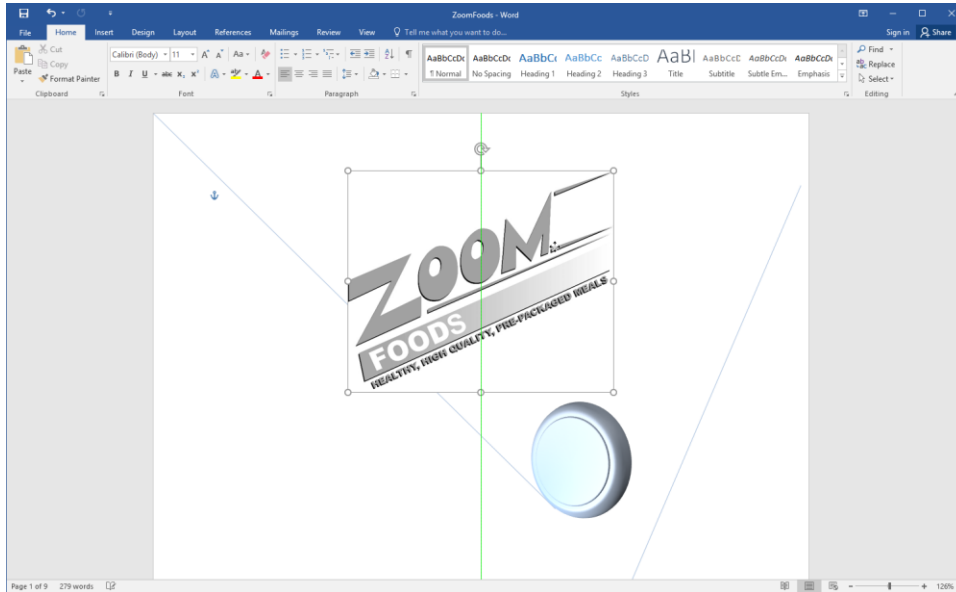
The More Layout Options command will open the Position tab of the Layout dialog:



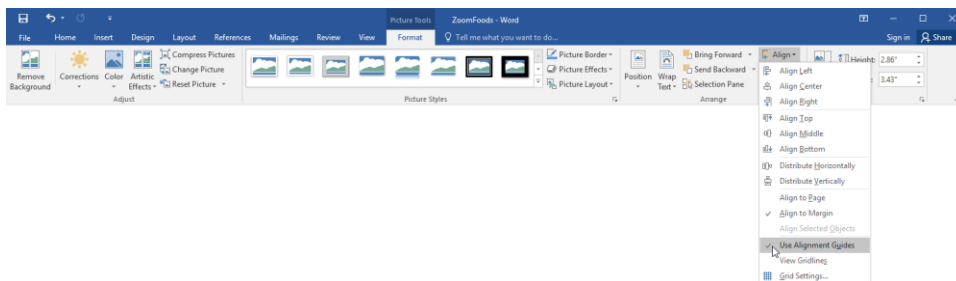
Here you will find options to precisely control the position of this image.

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 → Align → Use Alignment Guides:

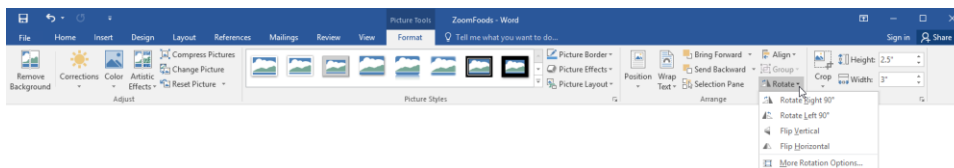


ROTATING IMAGES

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

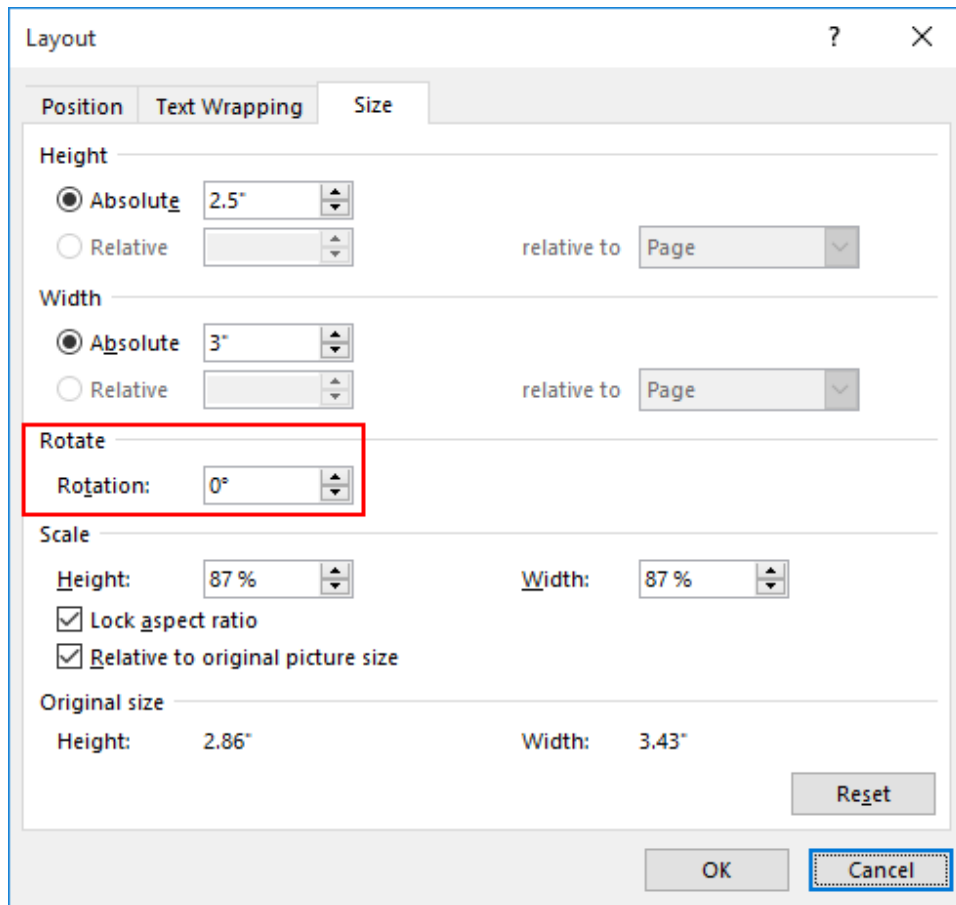


Or, select a picture, click Picture Tools – Format → Rotate, and choose a rotation option:



You can also see options in this menu to flip the picture vertically or horizontally.

The More Rotation Options command will open the Layout dialog to the Size tab:

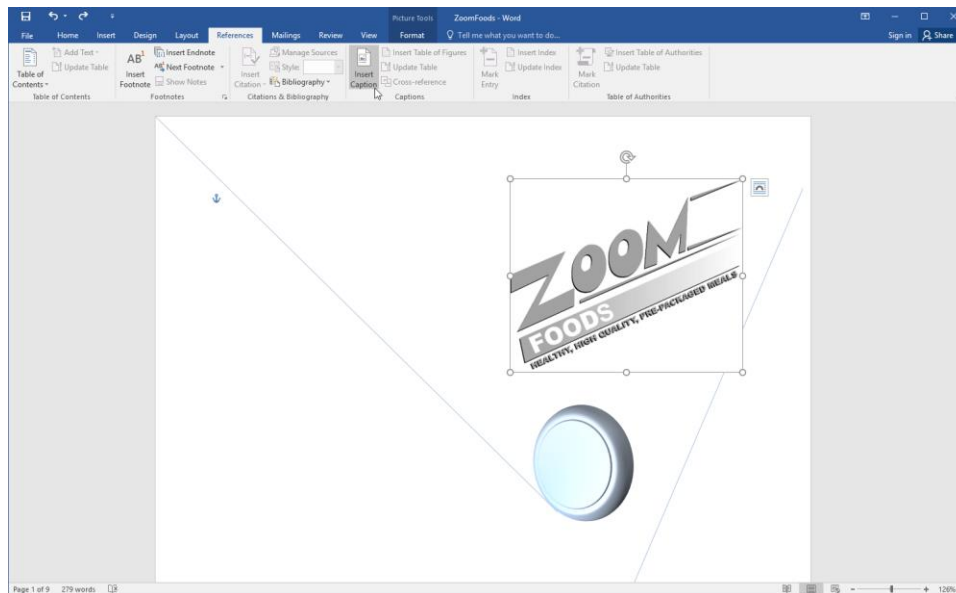


Here, you can enter a specific degree of rotation in the appropriate field. Then, click OK to apply it.

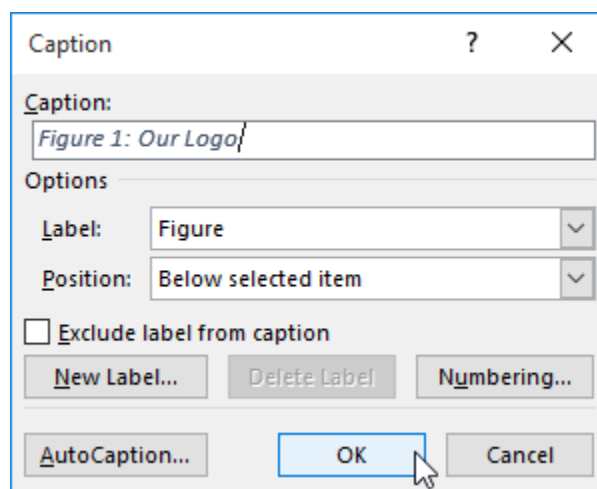
ADDING CAPTIONS

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.

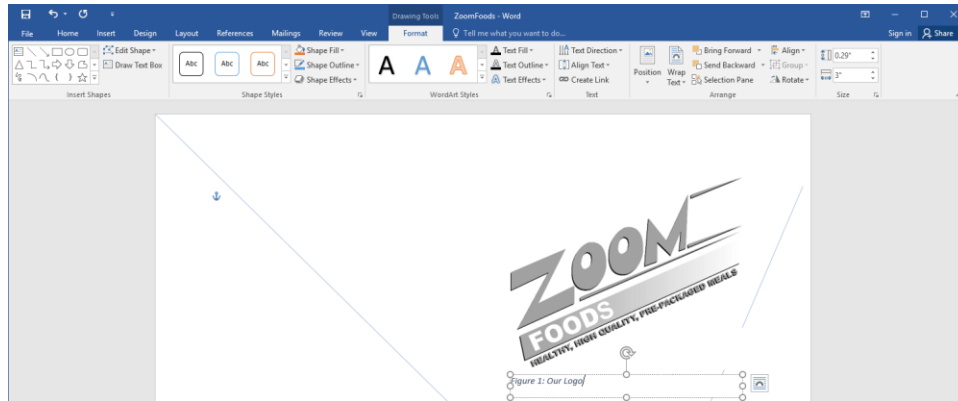
To insert a caption, select the image that you would like the caption to be applied to. Then, click References → Insert Caption:



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:



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

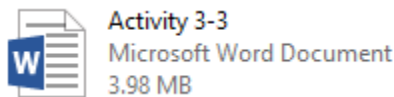


ACTIVITY 3-3

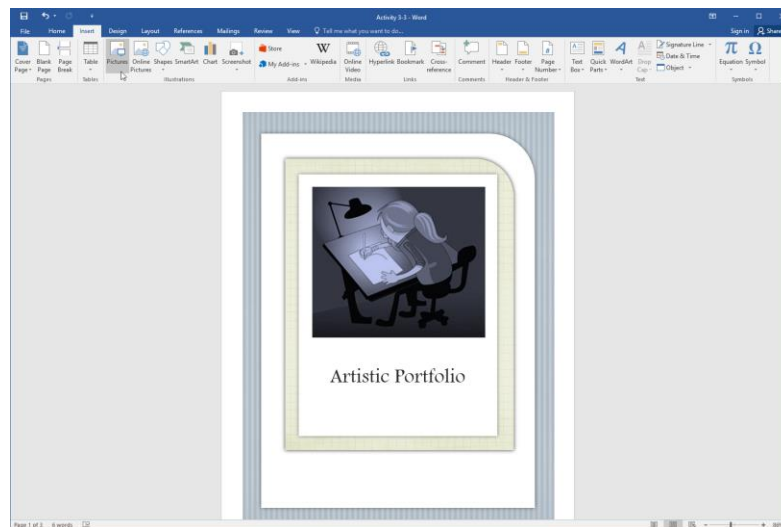
Integrating Pictures and Text

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

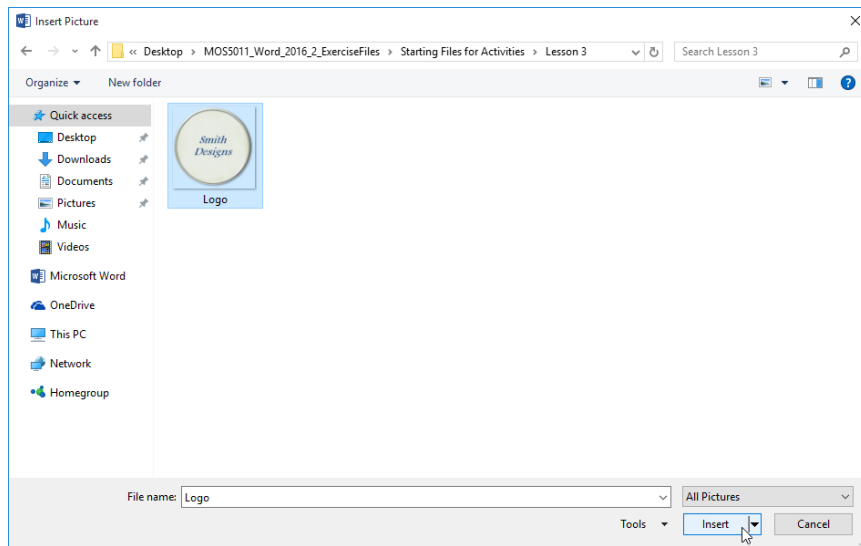
1. Open Microsoft Word 2016 and open Activity 3-3:



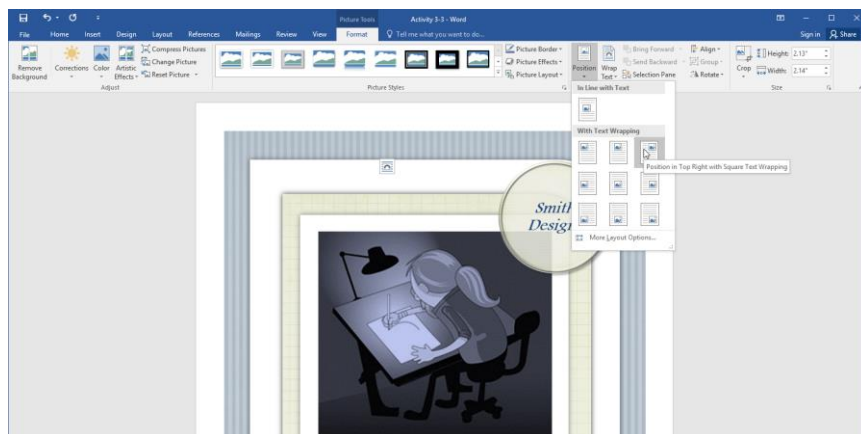
2. Ensure that your cursor is on the first page of the document. Click Insert → Pictures:



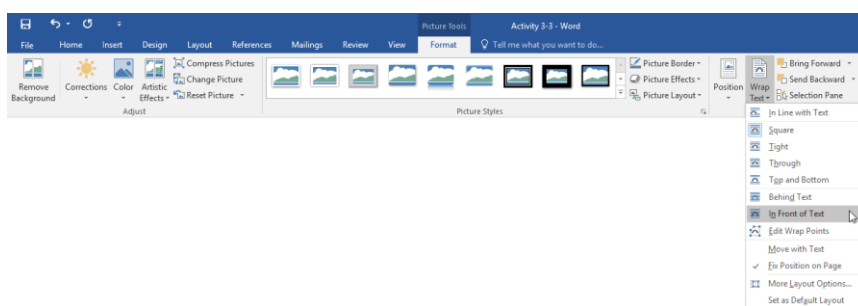
3. Browse to your Exercise Files folder. Locate and select the Logo image. Click Insert:



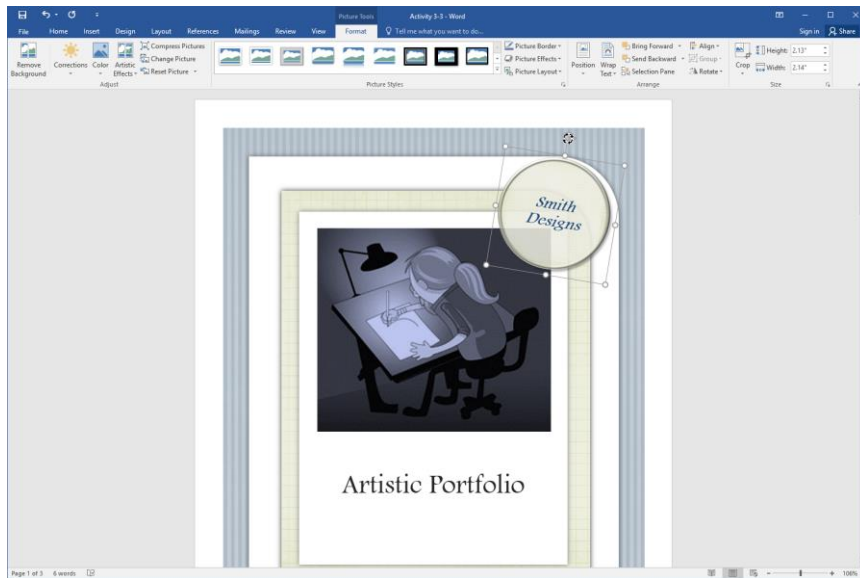
4. The image will be added, but will not be visible due to its position. To fix this, click Picture Tools – Format → Position and choose the position shown below:



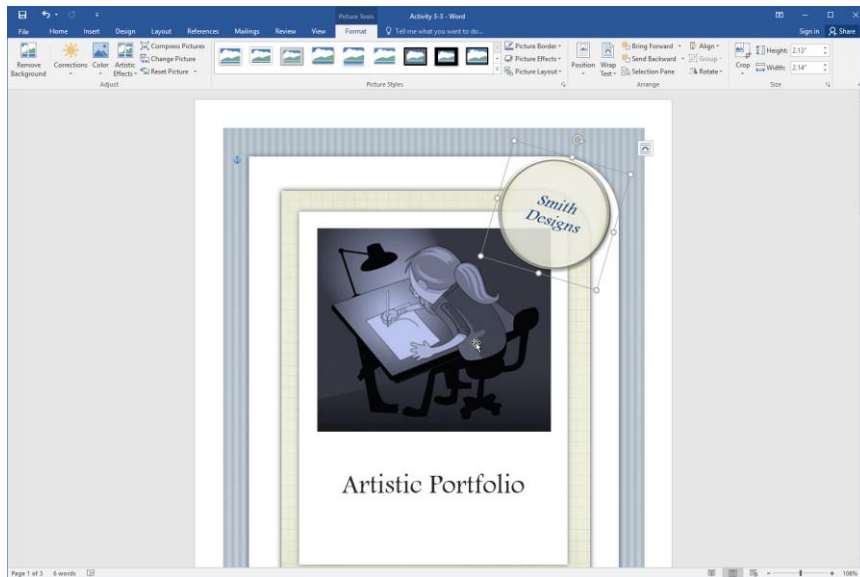
5. To ensure that the new image stays visible, click Picture Tools – Format → Wrap Text → In Front of Text:



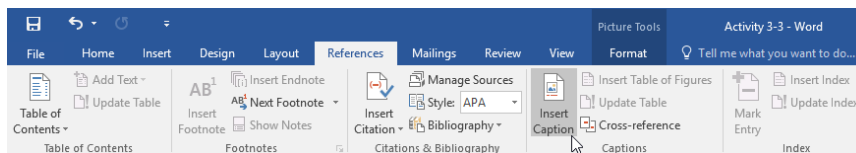
- Now, click the rotation handle at the top of the image and drag it slightly to the right, like this:



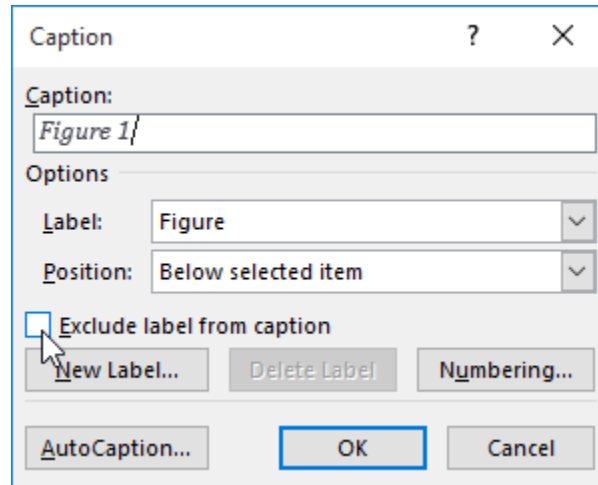
- Next, let's add a caption to the other image on the title page. Click it to select it:



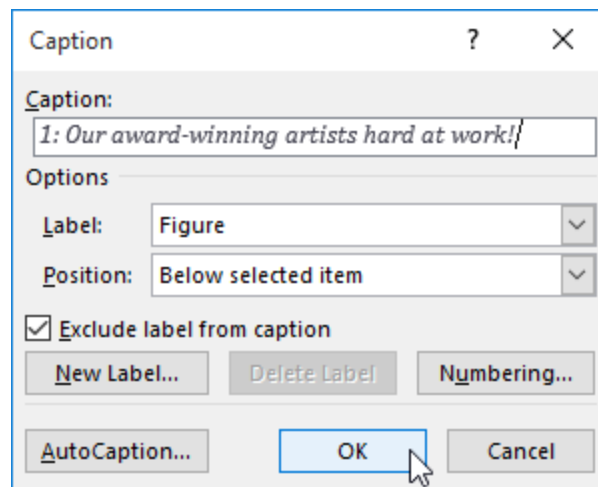
- Click References → Insert Caption:



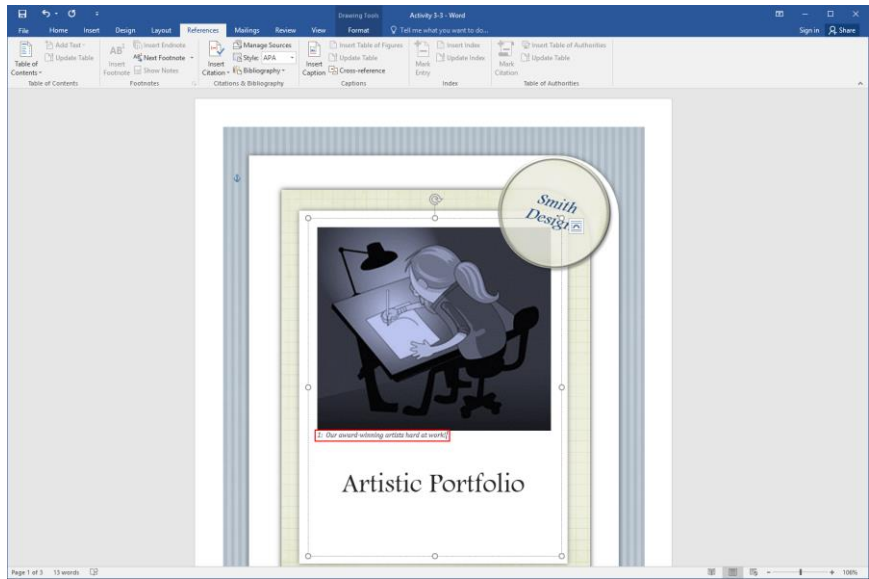
- The Caption dialog box will open. Check the “Exclude label from caption” box:



- In the Caption box, type, “: Our award-winning artists hard at work!” Then, click OK:



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

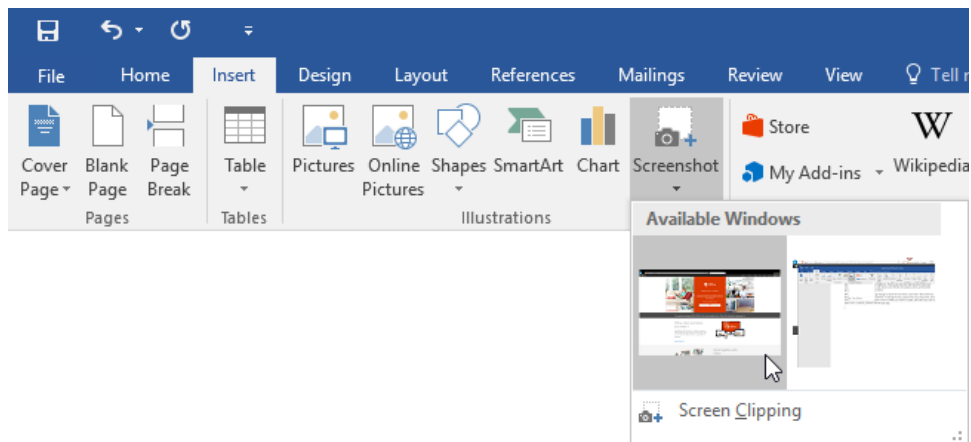
In this topic, you will learn:

- About the Screenshot tool

THE SCREENSHOT TOOL

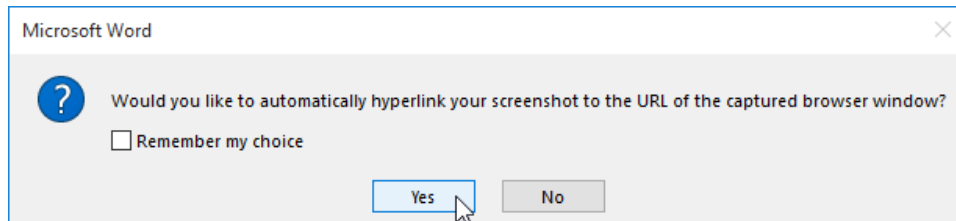
Adding a screenshot to a document involves a few steps. To start, make sure that the window that you want to take a picture of is maximized. Then, bring up Microsoft Word. Click to place your cursor in the document at the location where you want the image to be inserted.

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

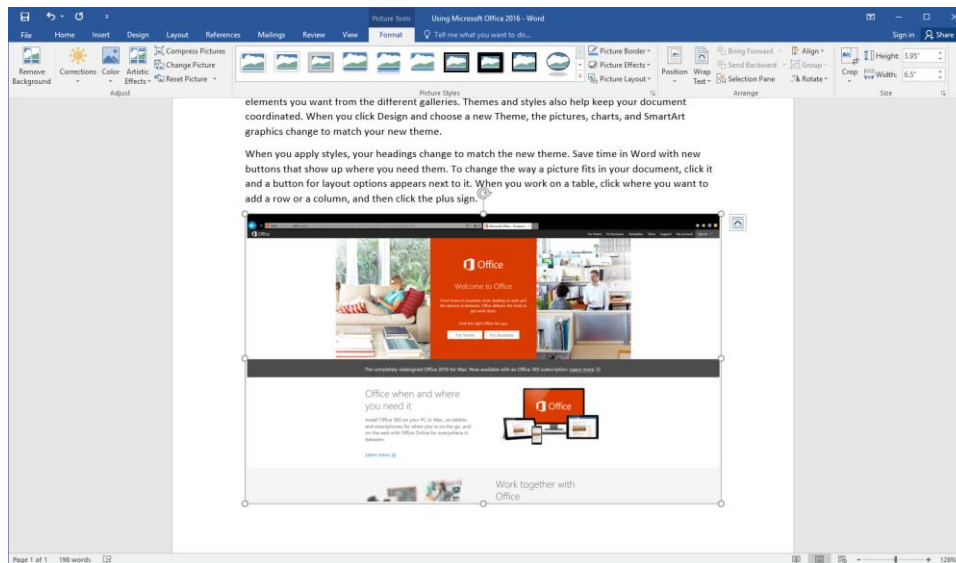


If you do not see the desired window in the list, first minimize all windows. Then, maximize the desired window and maximize Word. Now, click Insert → Screenshot → Screen Clipping. You will now be able to manually select the portion of the window that you want to take an image of.

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:



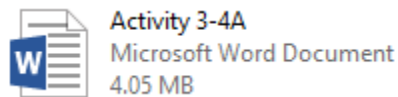
You can now work with the screenshot as you would any other image.

ACTIVITY 3-4

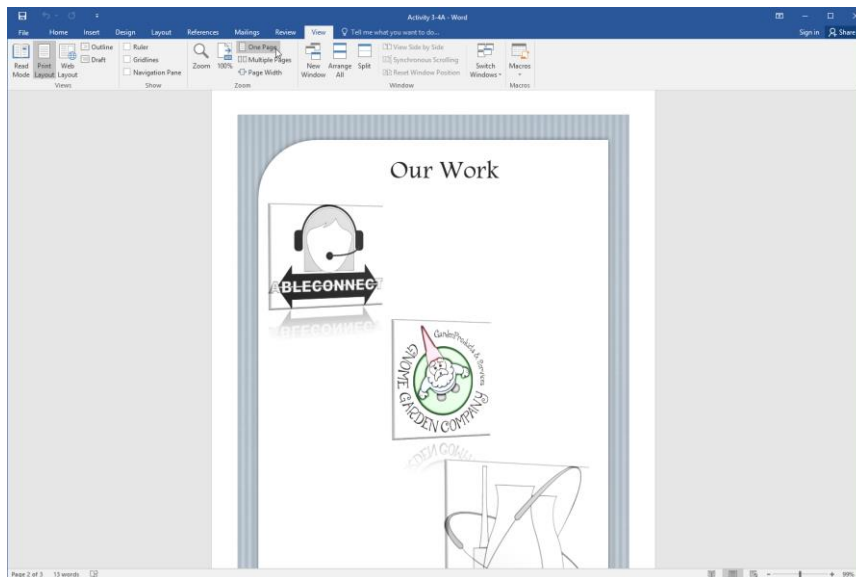
Inserting and Formatting Screenshots

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

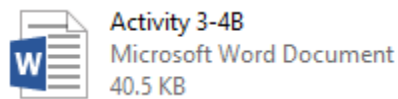
1. Open Microsoft Word 2016 and open Activity 3-4A:



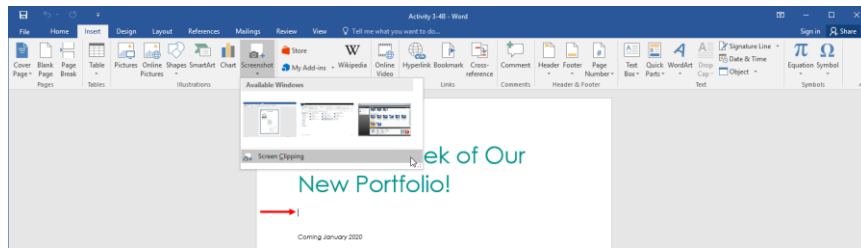
2. Go to the second page of the document. Click View → One Page:



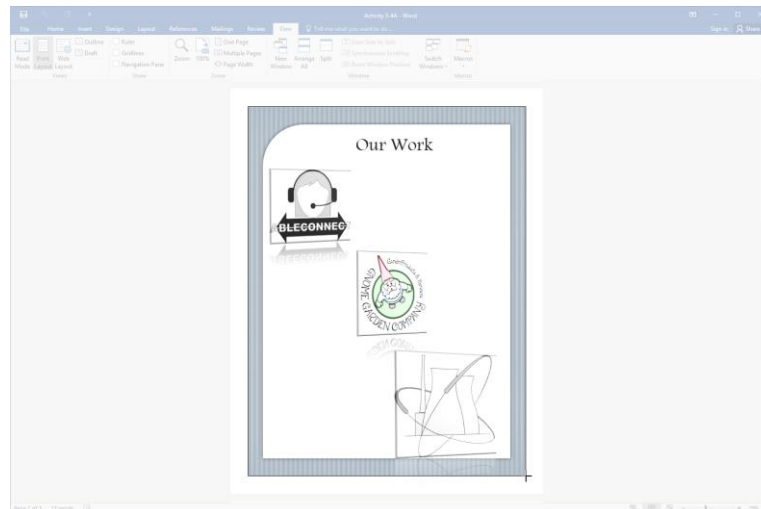
3. Now, open Activity 3-4B:



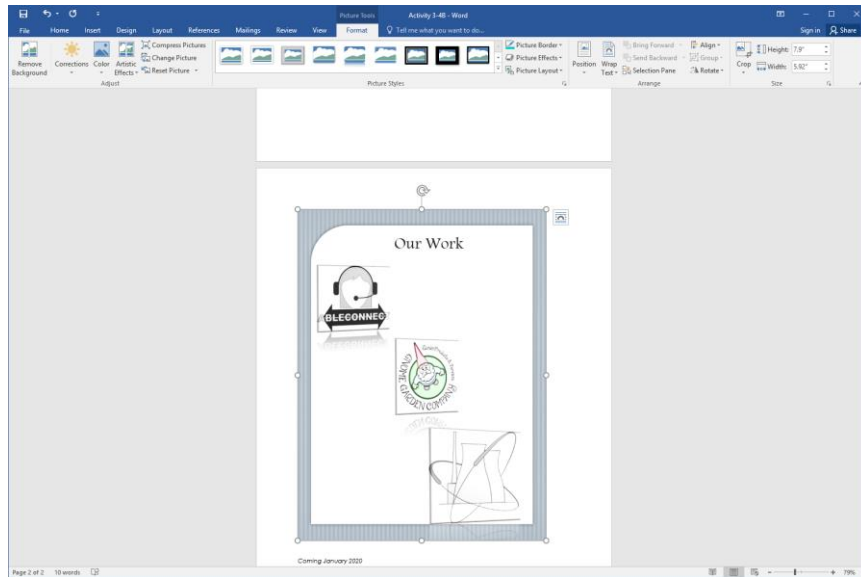
4. Ensure that your cursor is below the title, but before the final line of text. Click Insert → Screenshot → Screen Clipping:



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:

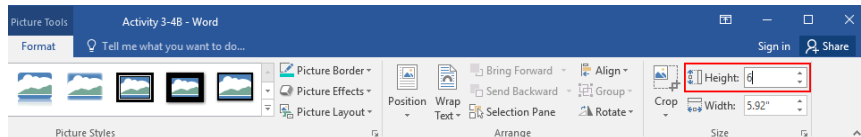


- The image will be captured and added to the Activity 3-4B document:

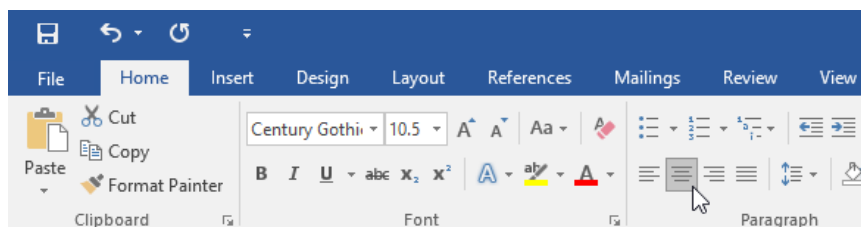


(The size may vary slightly depending on your monitor and window size. If so, that's OK.)

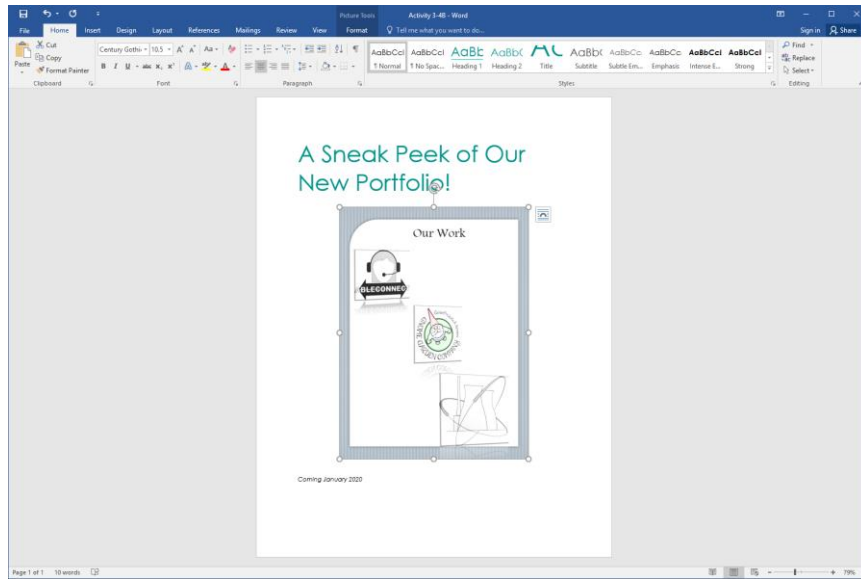
- Now, let's resize it. Type "6" in the Height field on the Picture Tools – Format tab and press Enter:



- Click Home → 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

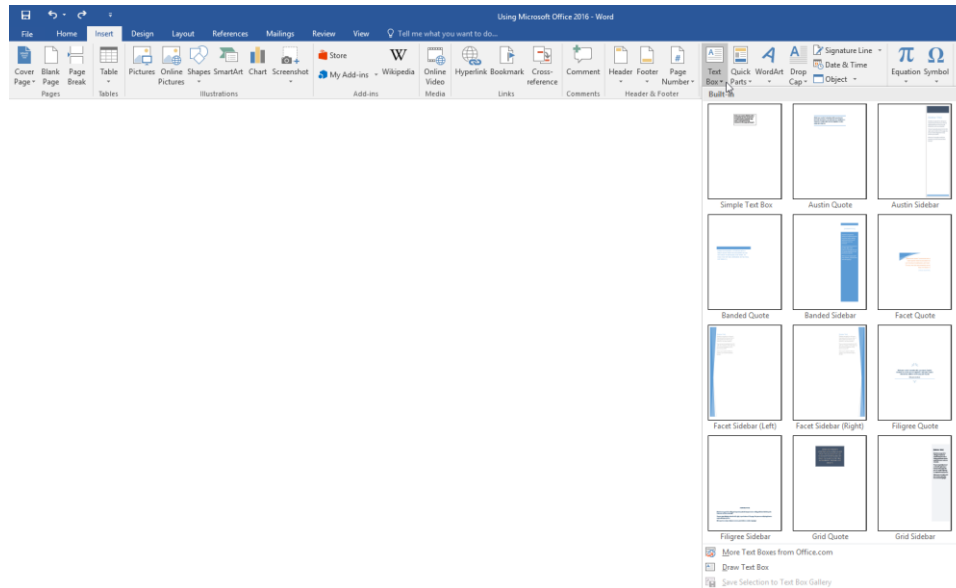
TYPES OF TEXT BOXES

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 pre-designed 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.

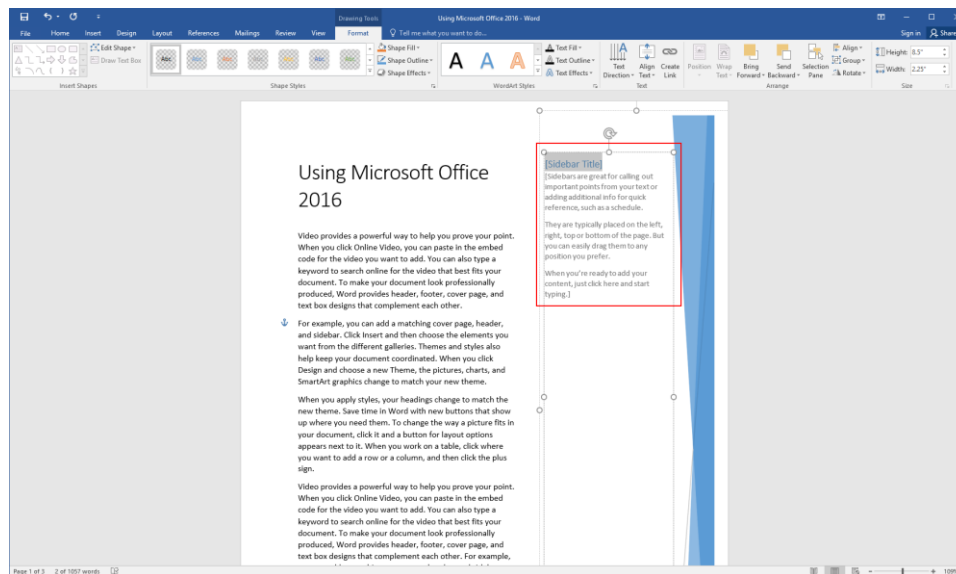
INSERTING A TEXT BOX WITH THE TEXT BOX GALLERY

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



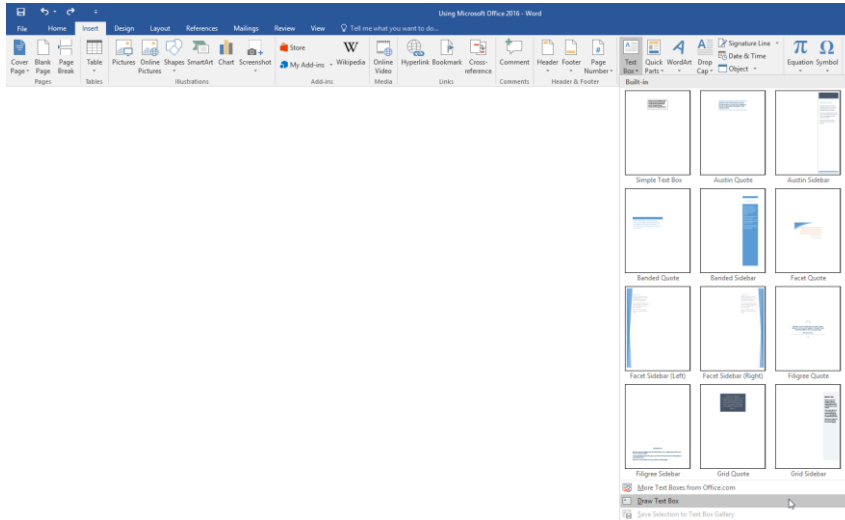
Note that you can scroll up or down to view the entire list.

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 → Text Box → Draw Text Box:



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



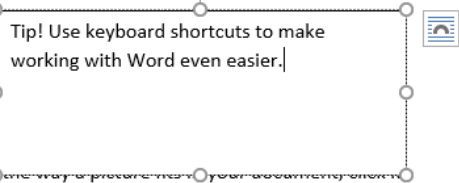
Once you have finished, you can type in the box:

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.

For example, you can add a matching cover page, header, and sidebar. Click 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 sounds that 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.



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

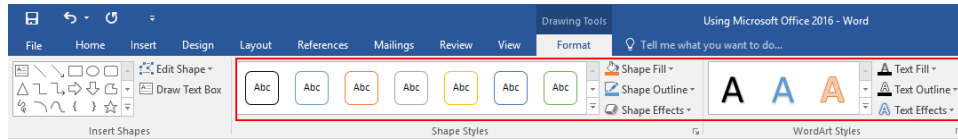
To apply a style to a text box, ensure it is selected. Then, click a thumbnail in the Shape Styles gallery. You will see a preview as you mouse over each thumbnail:



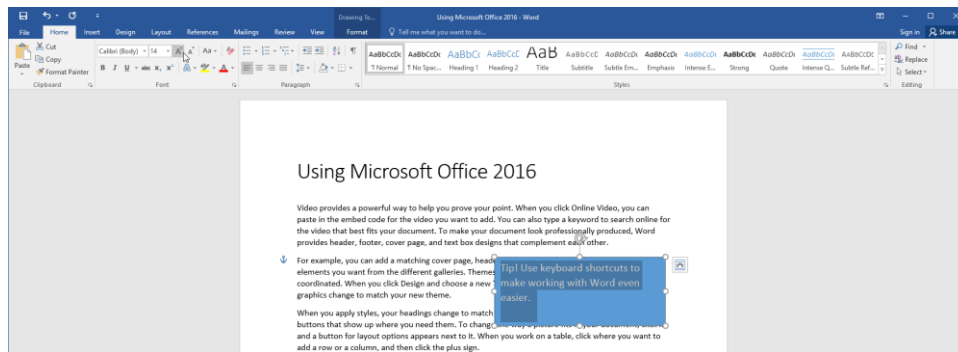
Remember, you can use the up or down arrows to navigate through the gallery, or click the More arrow to view all available styles.

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:

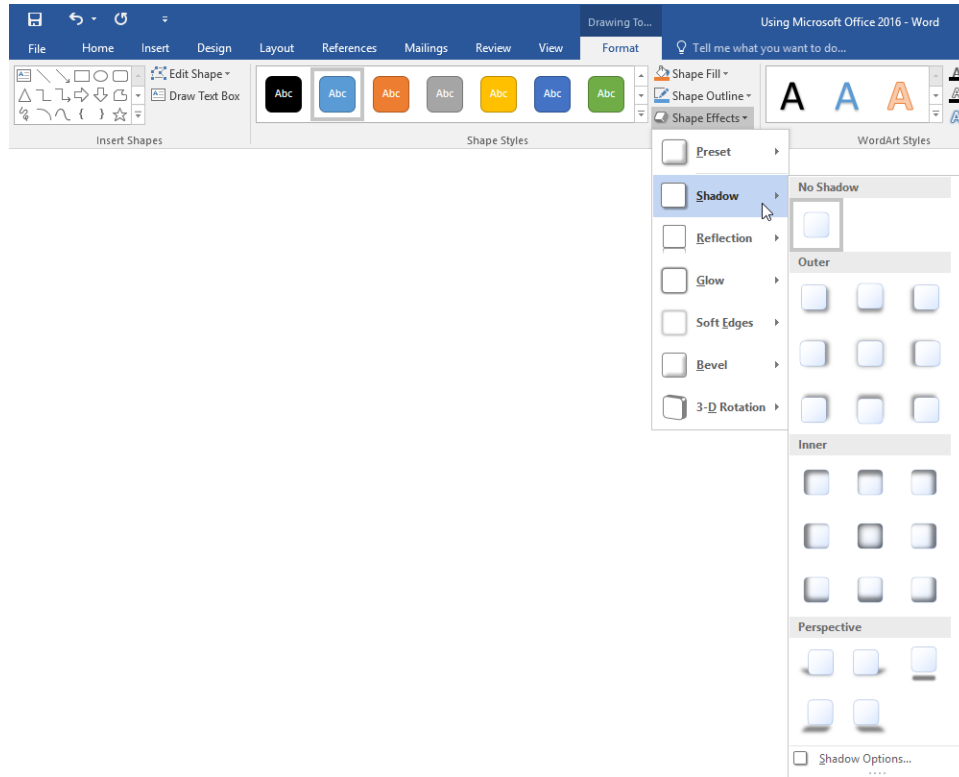


You can even use the tools on the Home tab and the mini toolbar to format the contents of the text box:

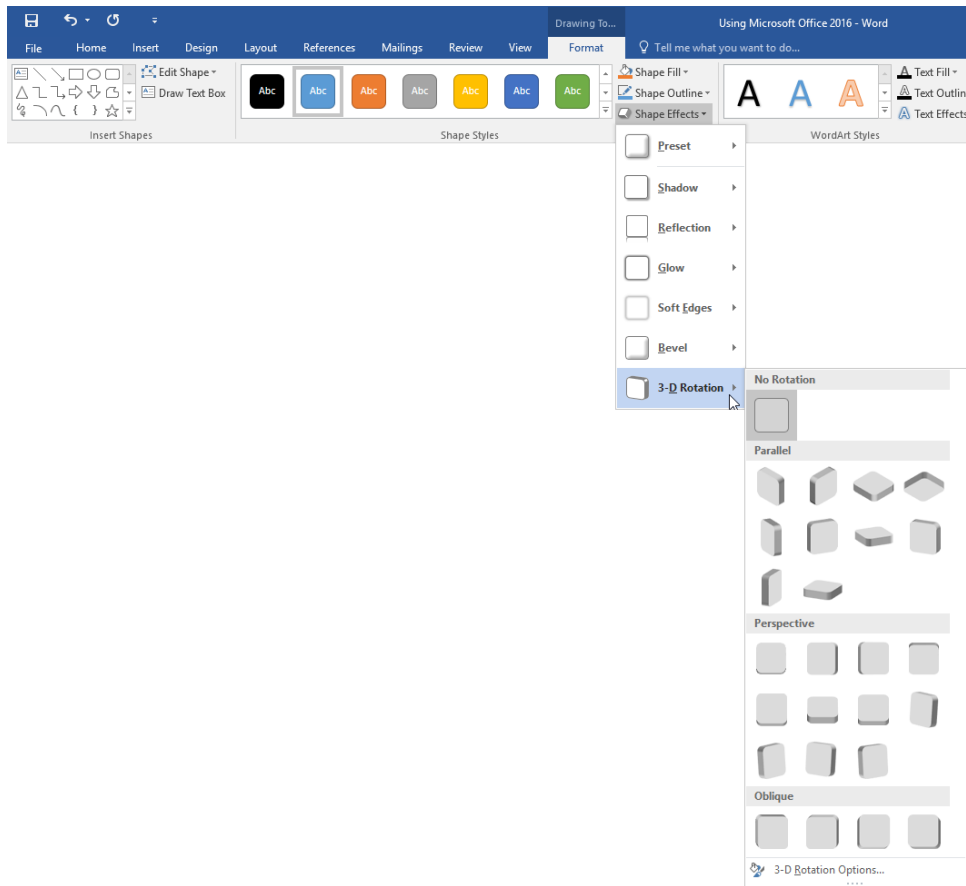


APPLYING SHADOW AND 3-D EFFECTS

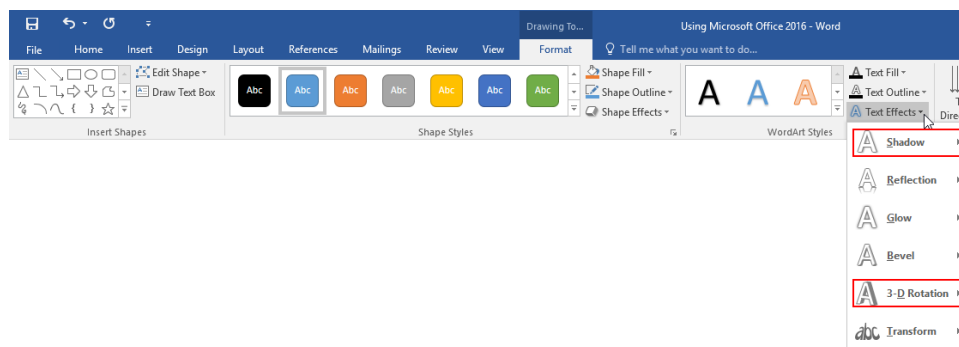
To add a shadow to your text box, click Drawing Tools – Format → Shape Effects → Shadow, and choose the effect that you want:



To add a 3-D effect to your text box, click Drawing Tools – Format → Shape Effects → 3-D Rotation and choose the rotation style that you want:

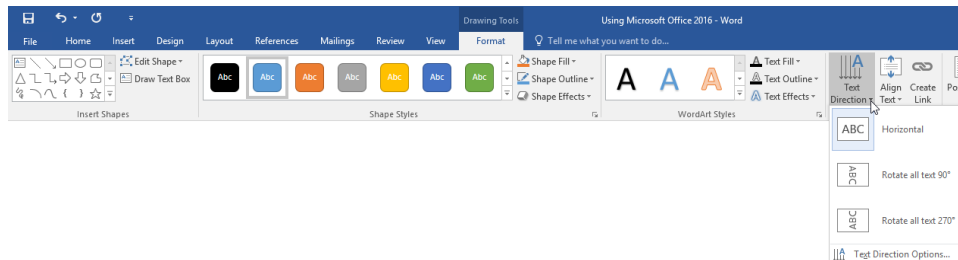


You can also apply a shadow or 3-D effect to the text itself with the Text Effects menu:

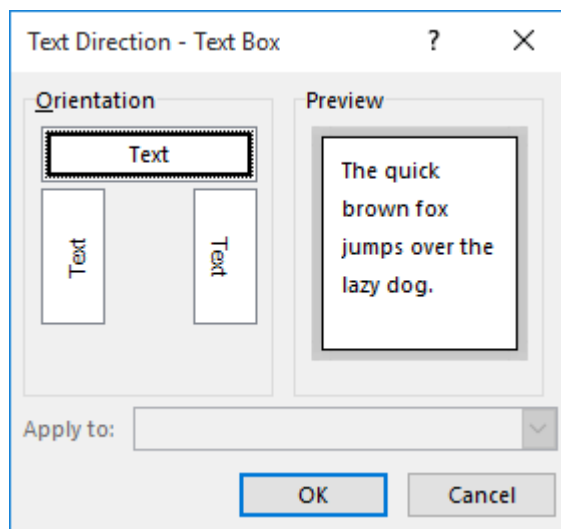


CHANGING TEXT DIRECTION

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

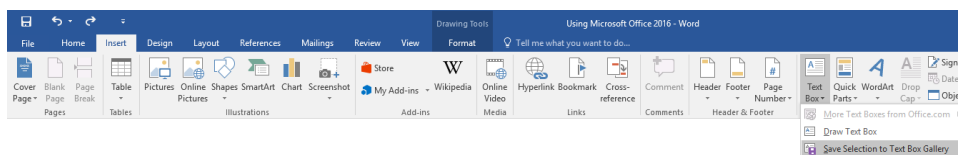


To modify advanced settings, click Text Direction Options from this menu:

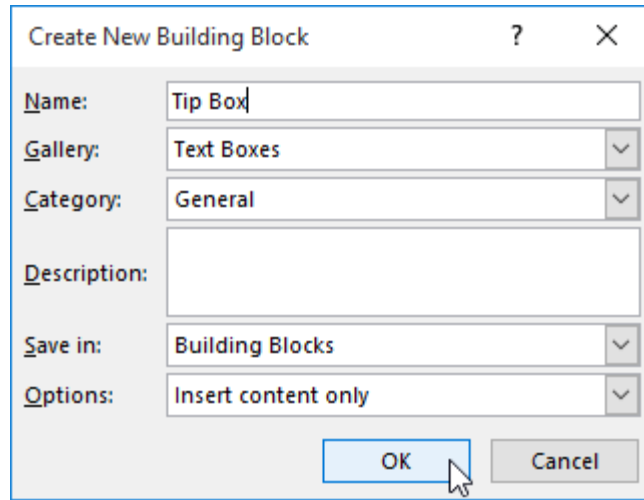


SAVING THE SELECTION TO THE TEXT BOX GALLERY

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



Now, set your options and click OK:

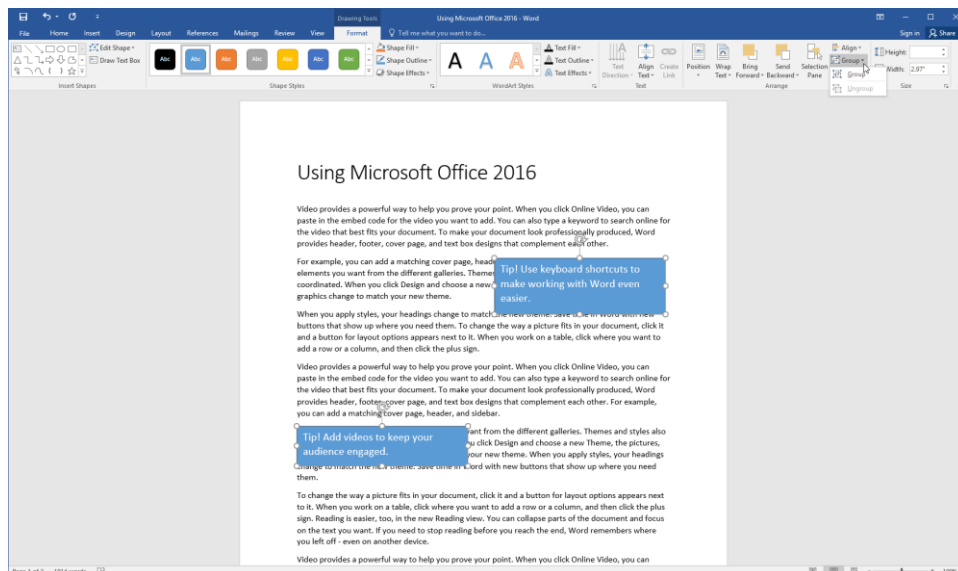


If you choose to save the object in the Building Blocks template, you will be prompted to save the changes the next time you close Microsoft Word. Then, the custom text box will be available in any document.

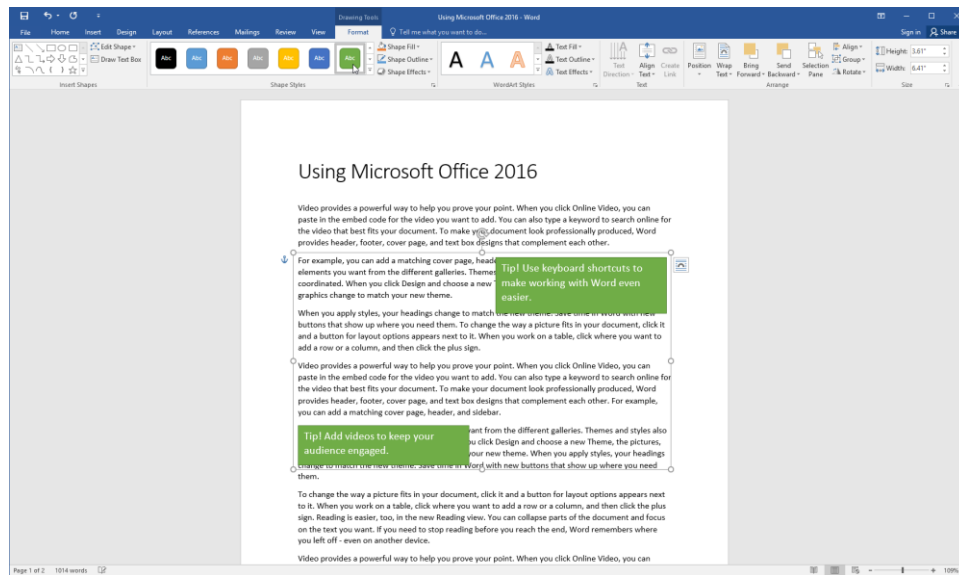
ARRANGING TEXT BOXES

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 → Group on the Drawing Tools – Format tab or the right-click menu:



The text boxes can now be manipulated as one object:



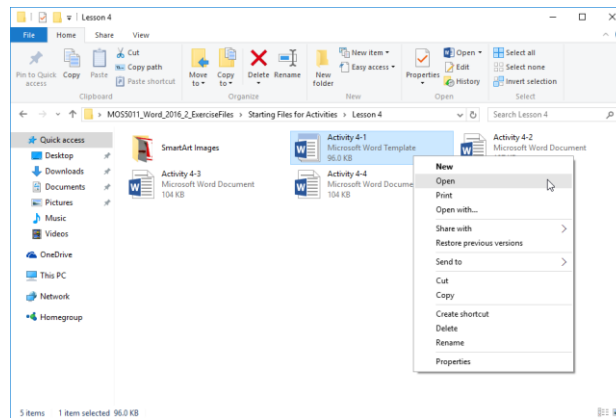
If you want to edit an individual text box, use the Ungroup command on the Drawing Tools – Format tab or the right-click menu.

ACTIVITY 4-1

Creating Text Boxes

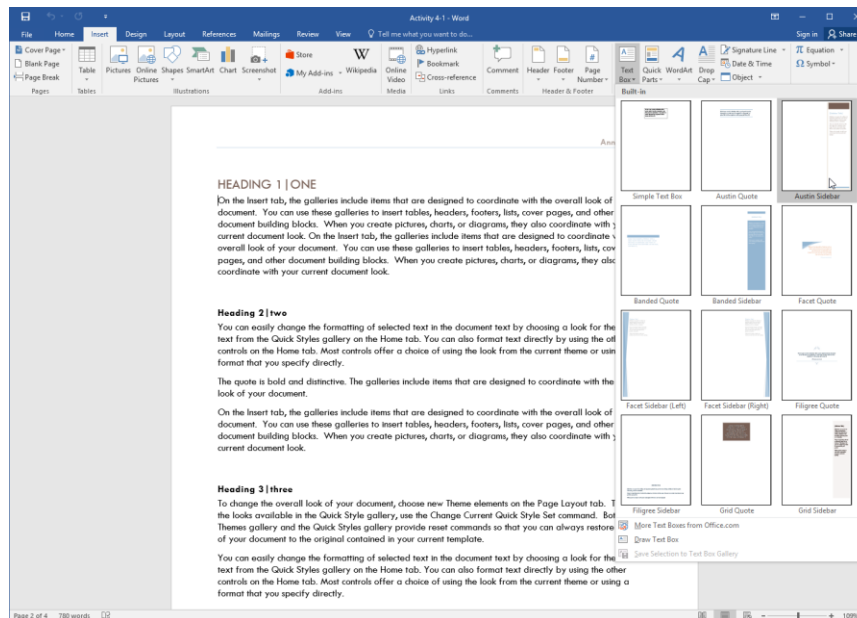
In this activity, you will add a text box to the template for Lesson 4 for an annual report. You will also customize this text box and save it for future use.

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

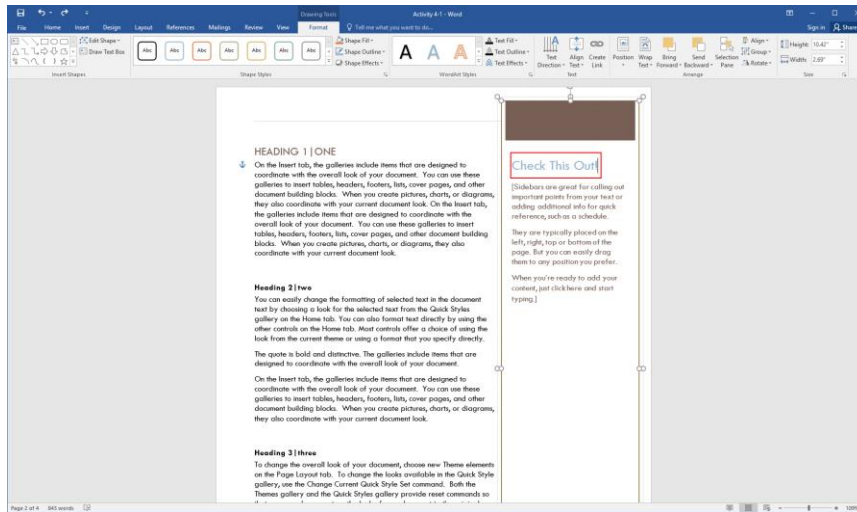


This will open the template file directly for editing.

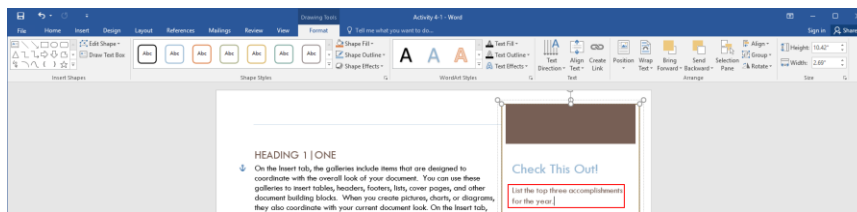
2. Scroll to page two of the document. Click anywhere on this page to place your cursor there. Then, click Insert → Text Box → Austin Sidebar:



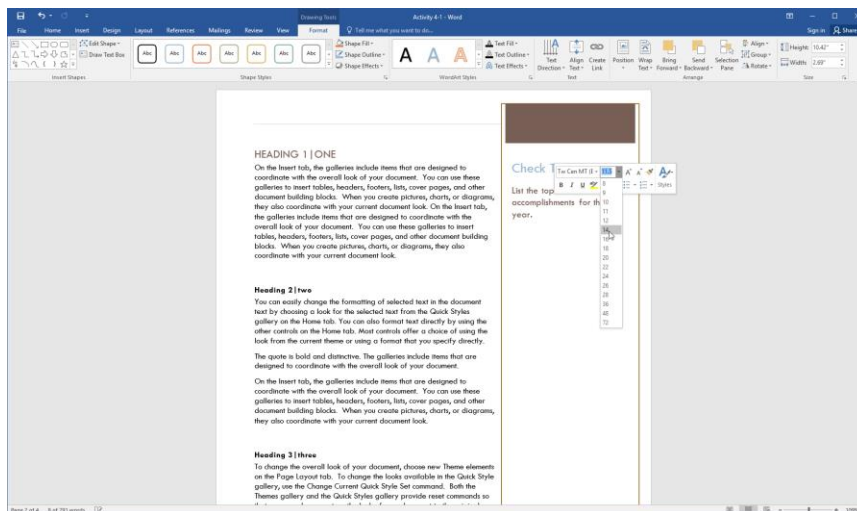
3. The “Sidebar Title” placeholder text should be selected. Type, “Check This Out!”



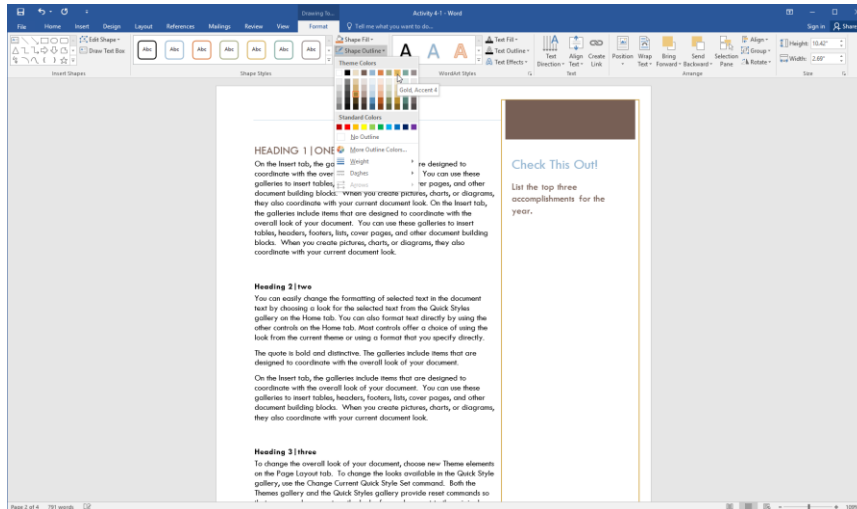
4. Click inside the sample body area of the text box and replace it with the following text: “List the top three accomplishments for the year.”



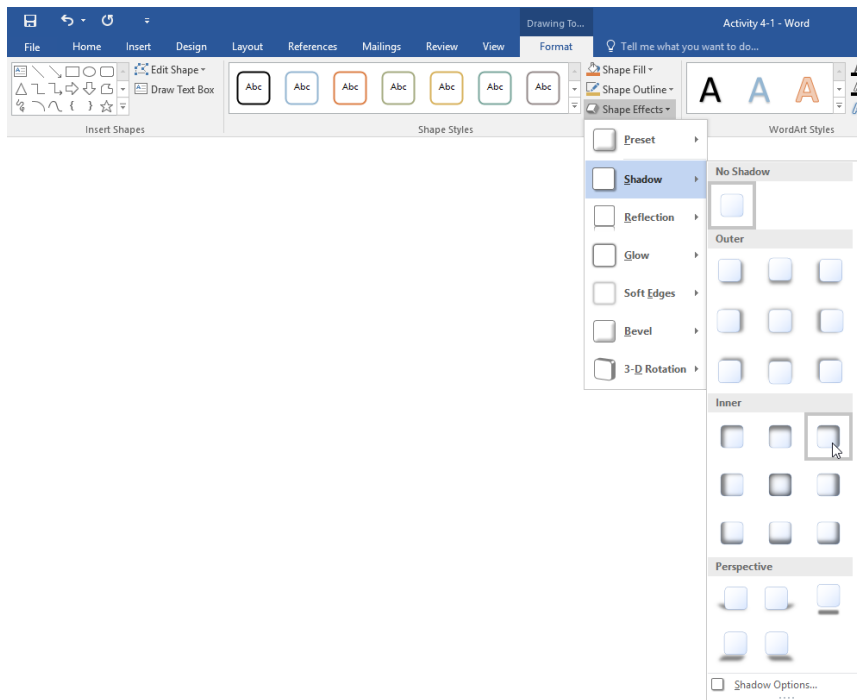
5. Select this text and use the mini toolbar to increase the font size to 14:



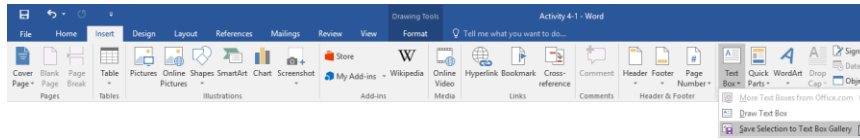
- Now let's make the box a bit more noticeable. De-select the text but make sure your cursor is still inside the text box. Click Drawing Tools – Format → Shape Outline → Gold, Accent 4:



- Click Drawing Tools – Format → Shape Effects → Shadow → Inside Diagonal Top Right:

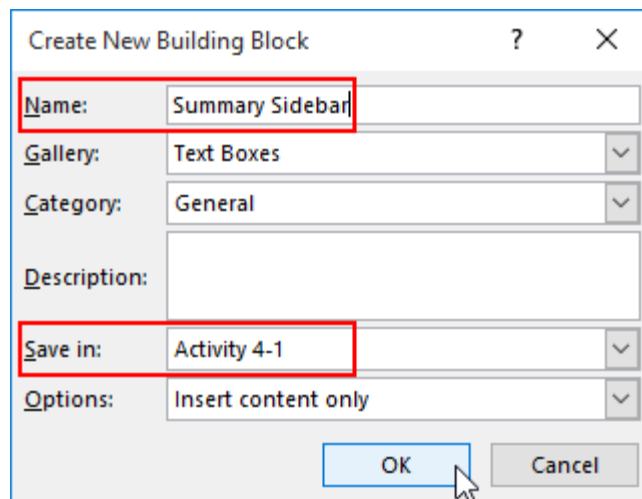


8. With the text box still selected, click Insert → Text Box → Save Selection to Text Box Gallery:



(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:



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

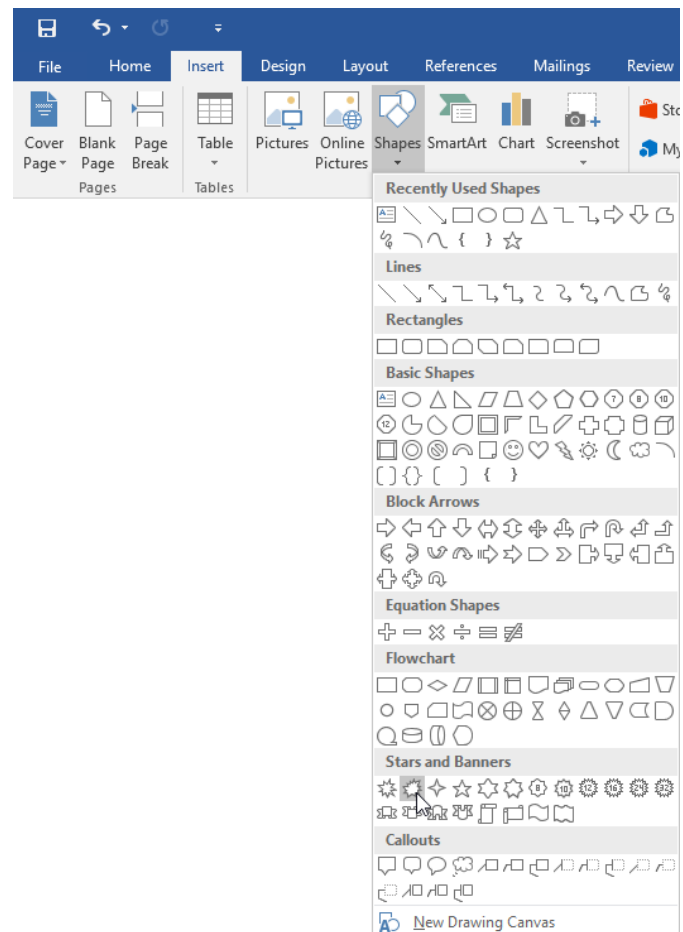
In this topic, you will learn:

- 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:



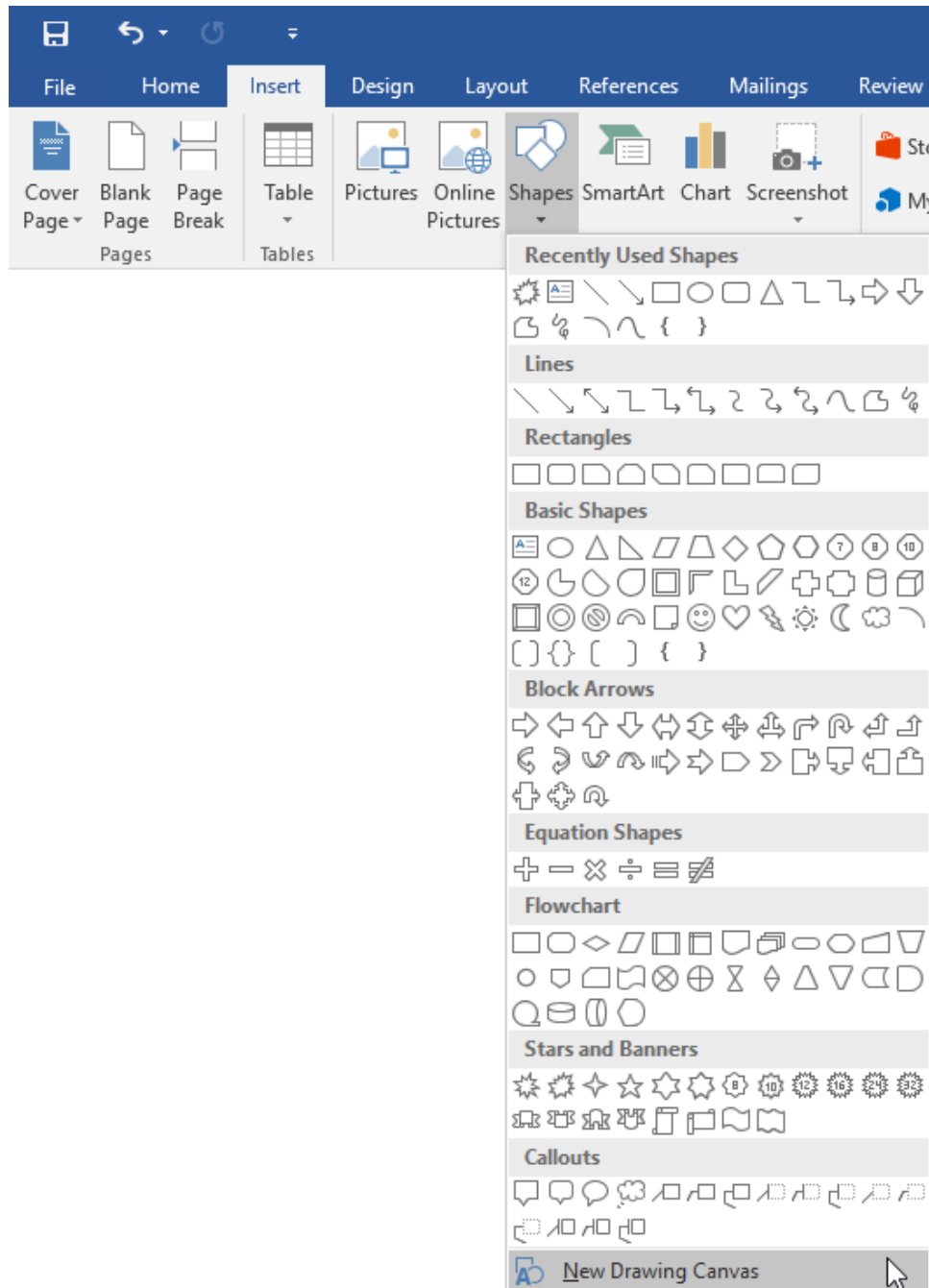
TYPES OF SHAPES

There are nine major categories in the Shapes menu:

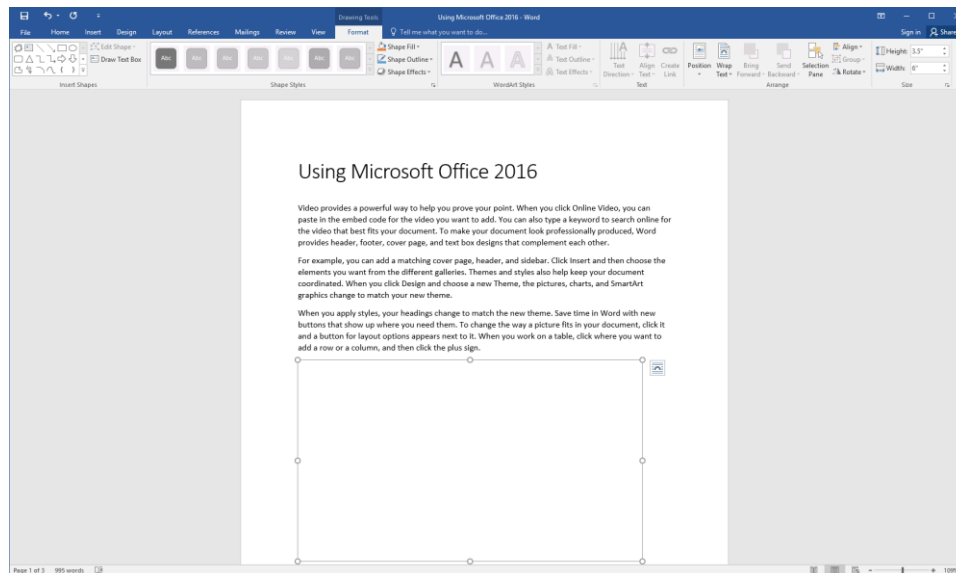
- **Recently Used Shapes:** Contains the most recently used shapes (up to the last 24).
- **Lines:** Create a variety of lines and plain arrows.
- **Rectangles:** Create a variety of rectangular shapes.
- **Basic Shapes:** Create basic shapes, such as circles and triangles. Fun shapes like smiley faces 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 → Shapes → New Drawing Canvas:

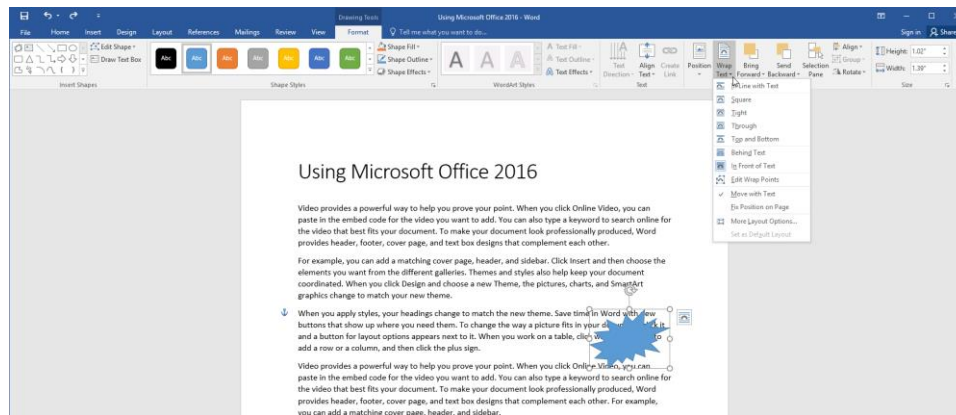


The canvas will now be inserted, ready to accept shapes:



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 → Wrap Text:

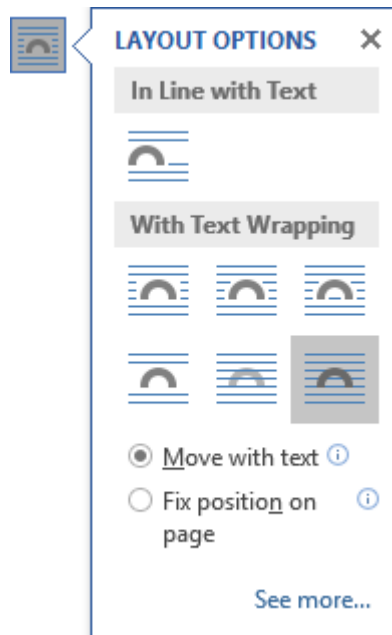


You will see a menu of wrapping styles. Each option's icon shows a small preview of what the shape and text will look like. The icon for the current text wrapping method will be highlighted, and new options will be previewed as you mouse over them. Note that all styles except "In Line with Text" allow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

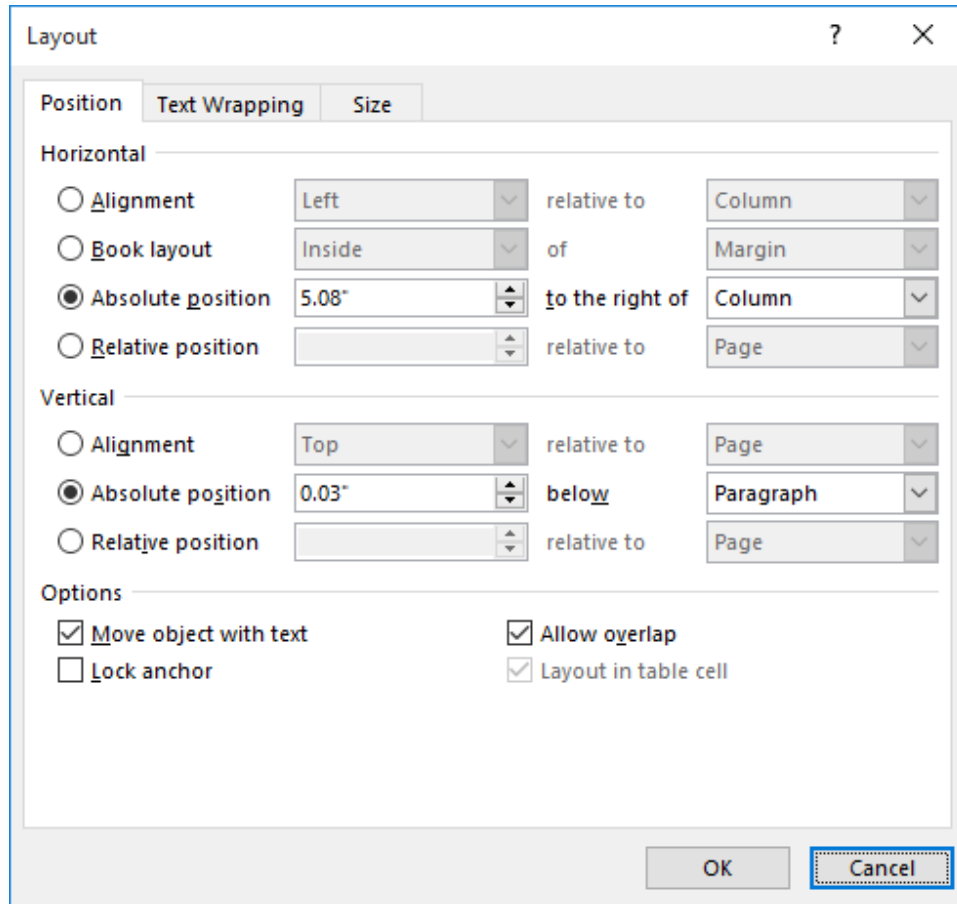
A quicker way to access these options is to click the Layout Options button next to a selected shape:



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

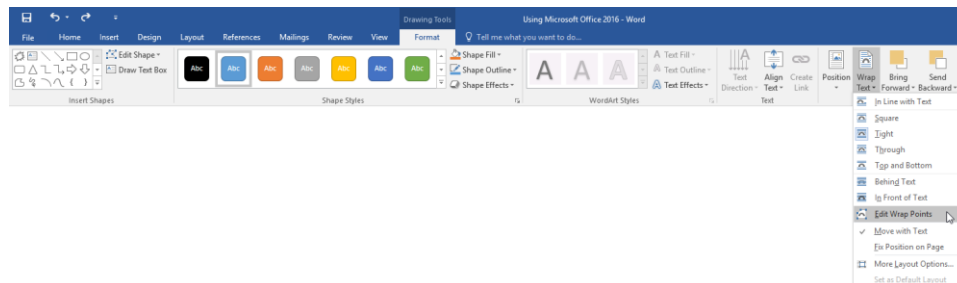


The More Layout Options command in the Wrap Text menu (and the “See more” link in the Layout Options pane) will open the Layout dialog, where you can access advanced text wrapping and position options:

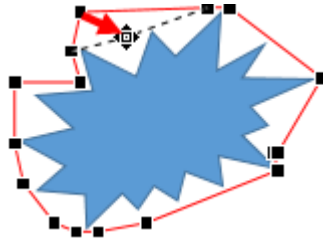


Configuring Wrap Points

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

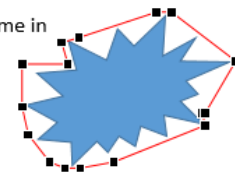


The shape will now be surrounded with a red border and black resize handles. Click and drag these handles to modify the associated point:



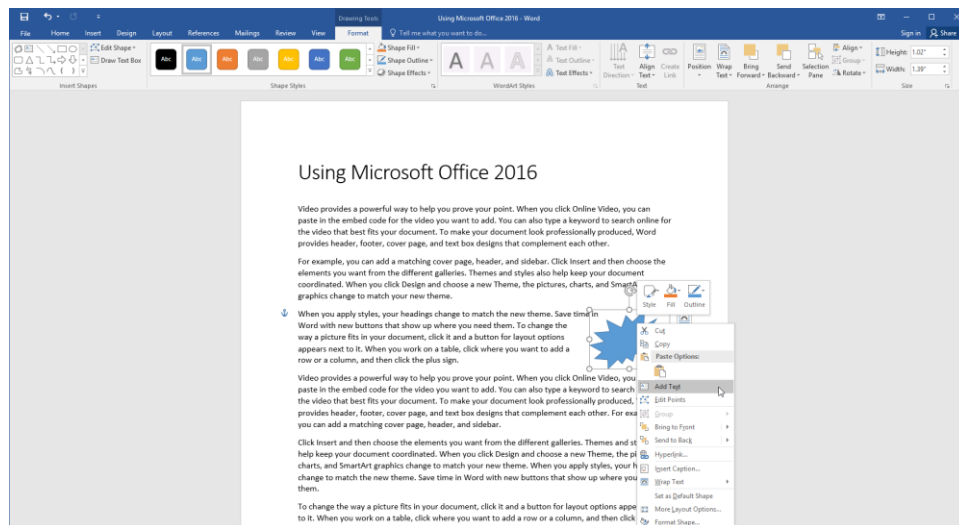
Here are the results of this change:

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:



(The command will differ with different types of shapes.)

Then a cursor will appear inside the shape. Type your text:

For example, you can add a matching cover page, header, and sidebar. Click 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.



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

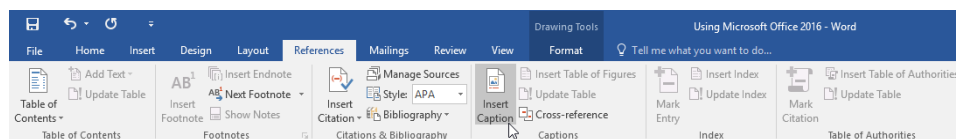
Word provides some pre-formatted styles that you can format shape text with. First, select the text. Then, click a thumbnail in the WordArt Styles group of the Drawing Tools – Format tab:



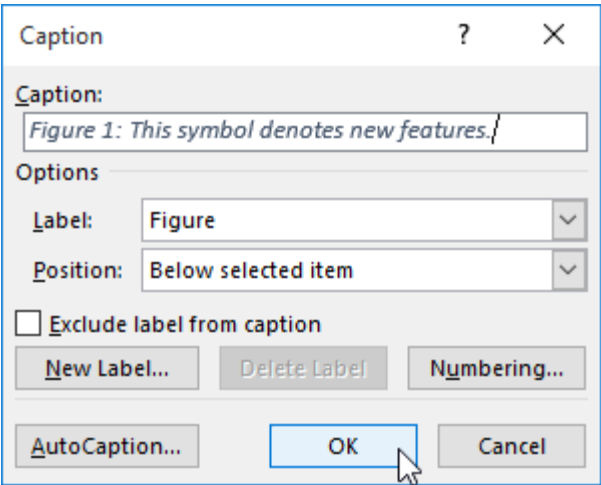
Remember, you can use the up or down arrows to navigate through the gallery. Or, click the More arrow to expand the gallery and view all styles. You can also use the tools on the Home tab and the mini toolbar to format shape text.

ADDING CAPTIONS

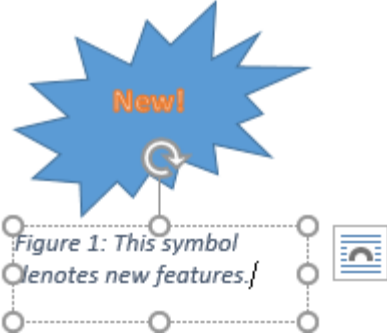
To add a caption to a shape, select the shape that you would like the caption to be applied to. Then, click References → Insert Caption:



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:

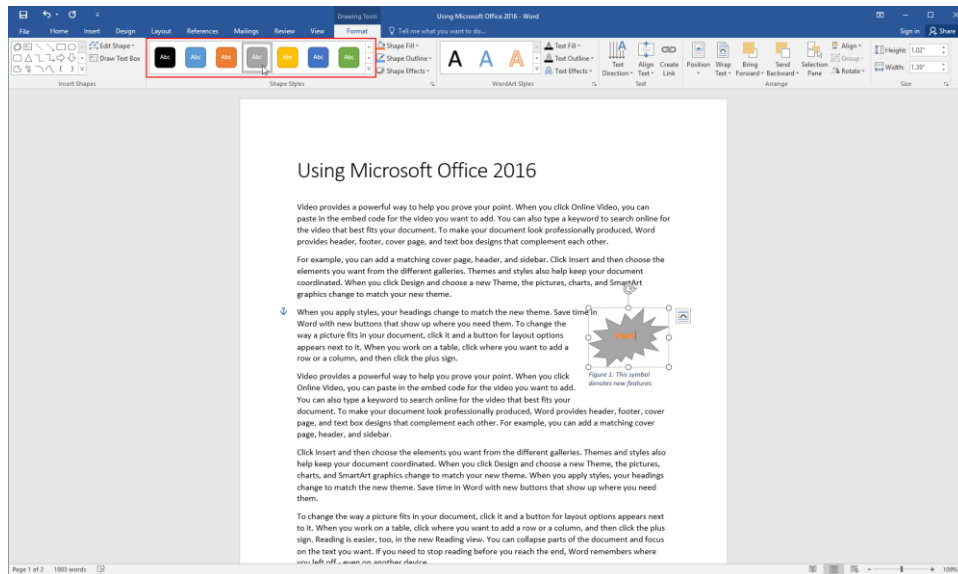


The caption will now be applied:



SETTING SHAPE STYLES

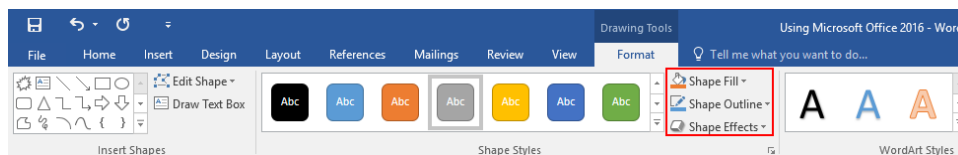
To apply a style to a shape, ensure that it is selected. Then, click a thumbnail in the Shape Styles gallery of the Drawing Tools – Format tab. You will see a preview as you mouse over each thumbnail:



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.

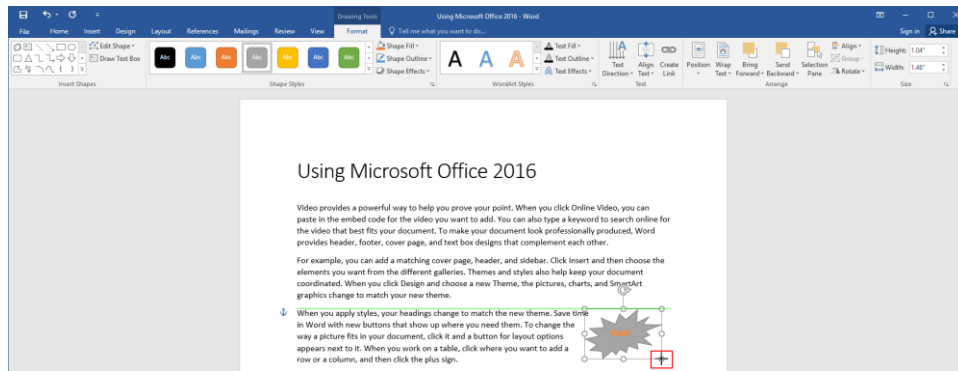
The styles available will depend on the theme currently selected. Likewise, the appearance of the shape will change if it is formatted with a style and you change the theme.

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:

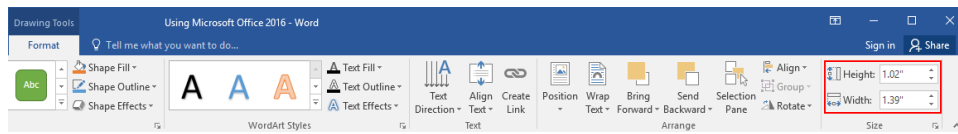


RESIZING OPTIONS

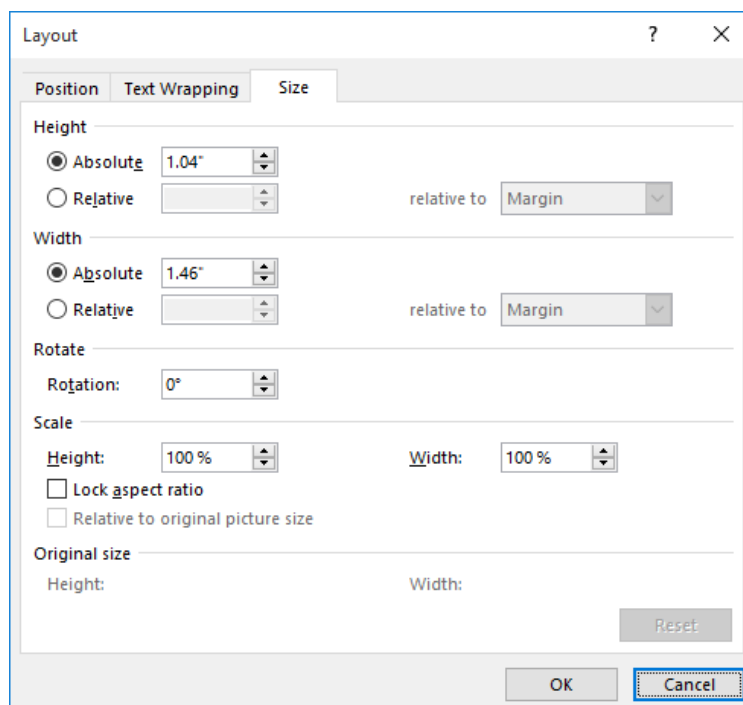
To resize a shape, first click it to select it. Then, click and drag any of the handles to resize the shape in that direction. As you drag the handles, you will see the shape become larger or smaller, depending on the direction that you drag in:



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

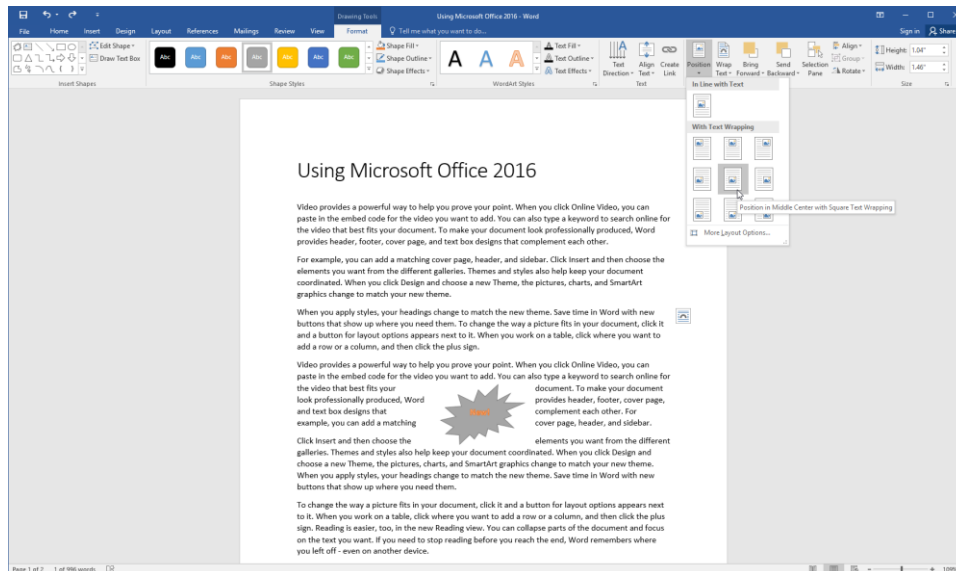


For advanced resizing options, click the option button in the Size group. This will open the Size tab of the Layout dialog, offering advanced sizing and scaling options:

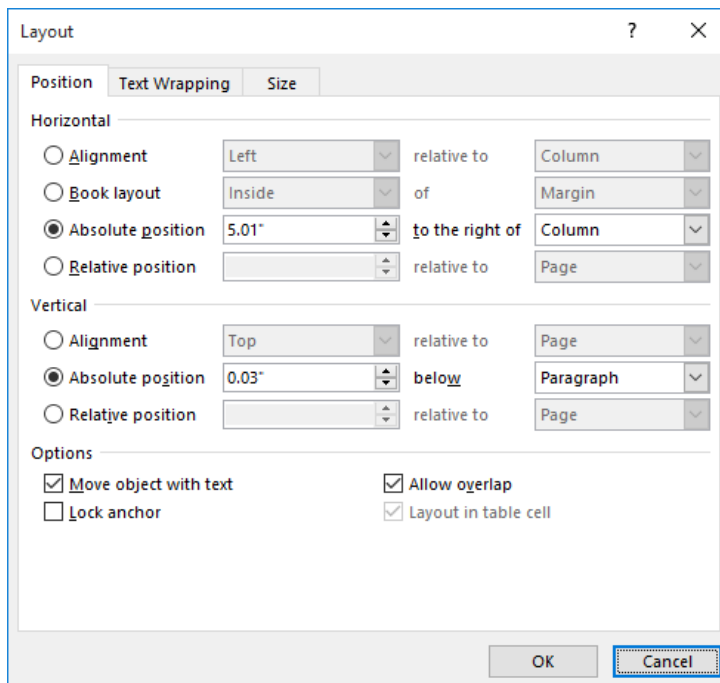


POSITIONING OPTIONS

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:



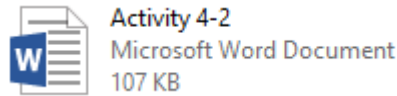
Here you will find options to precisely control the position of this shape.

ACTIVITY 4-2

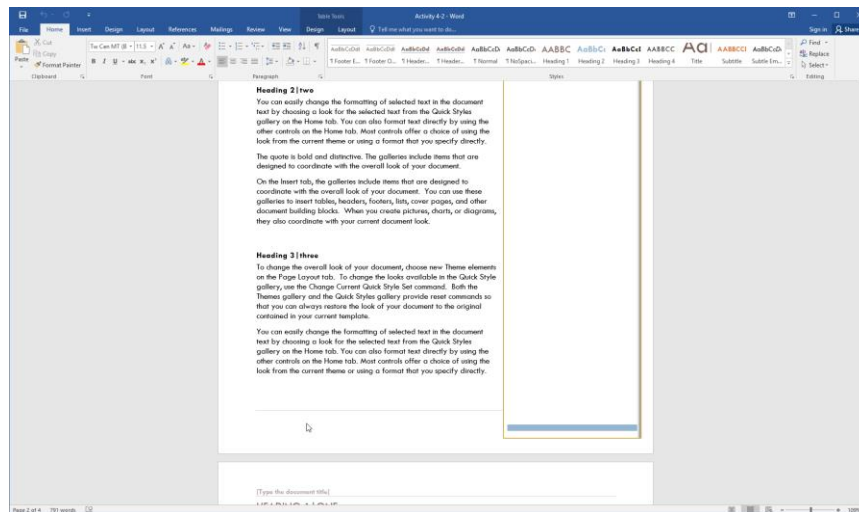
Drawing Shapes

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

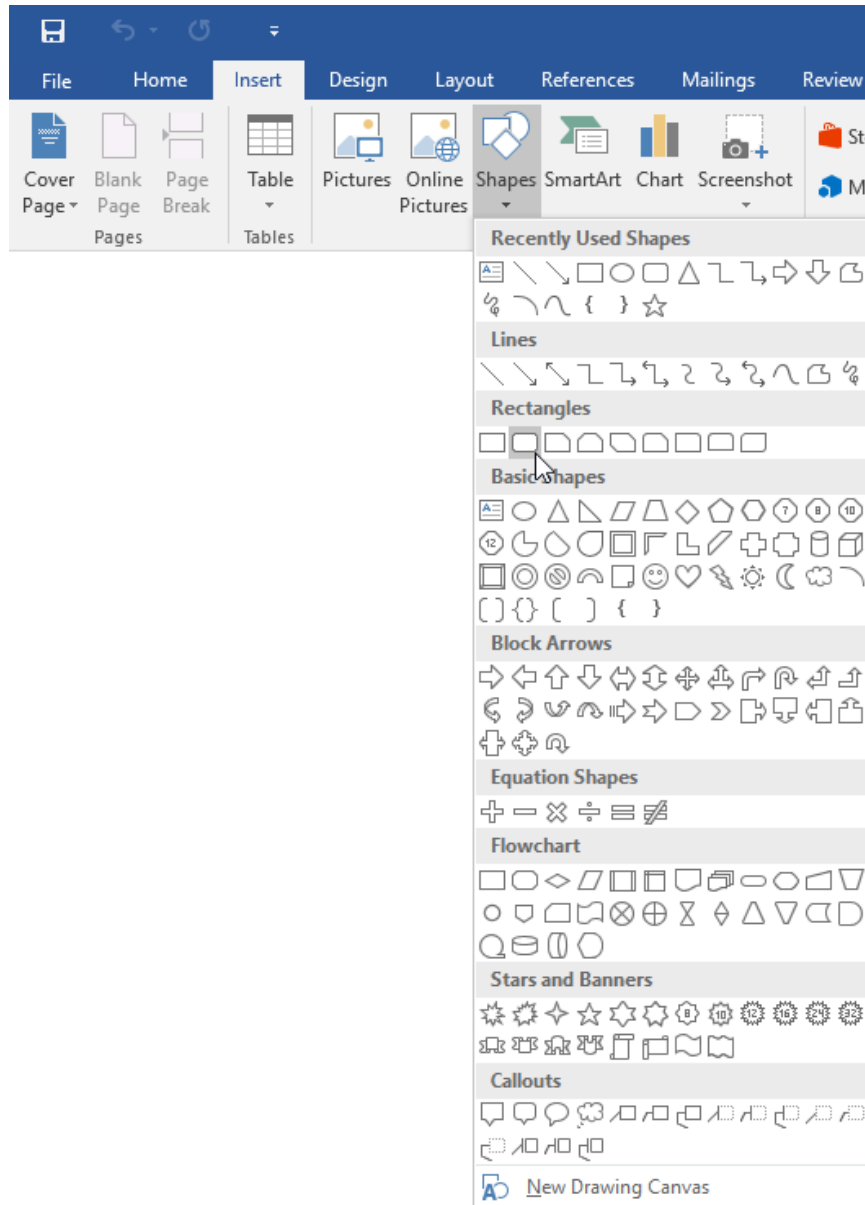
1. Open Microsoft Word 2016 and open Activity 4-2:



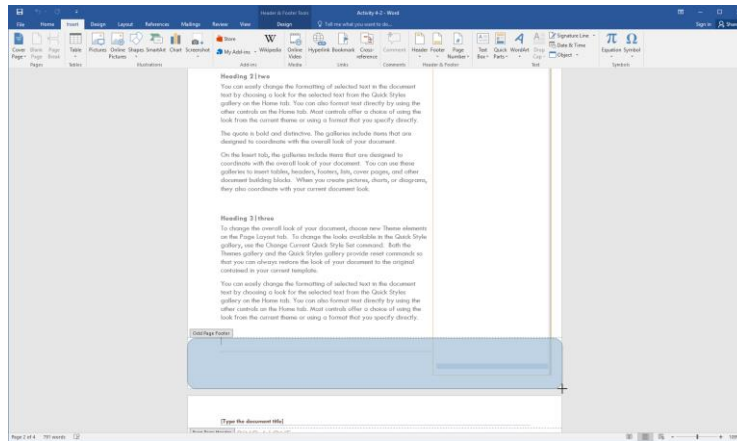
2. Scroll to the bottom of page two in the document. Double-click the footer area:



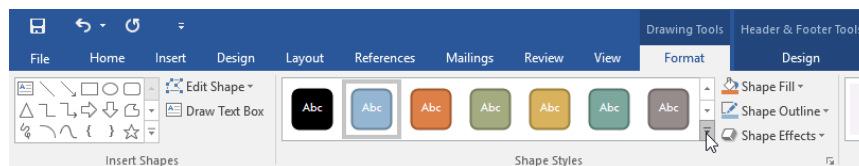
3. Now, click Insert → Shapes → Rounded Rectangle:



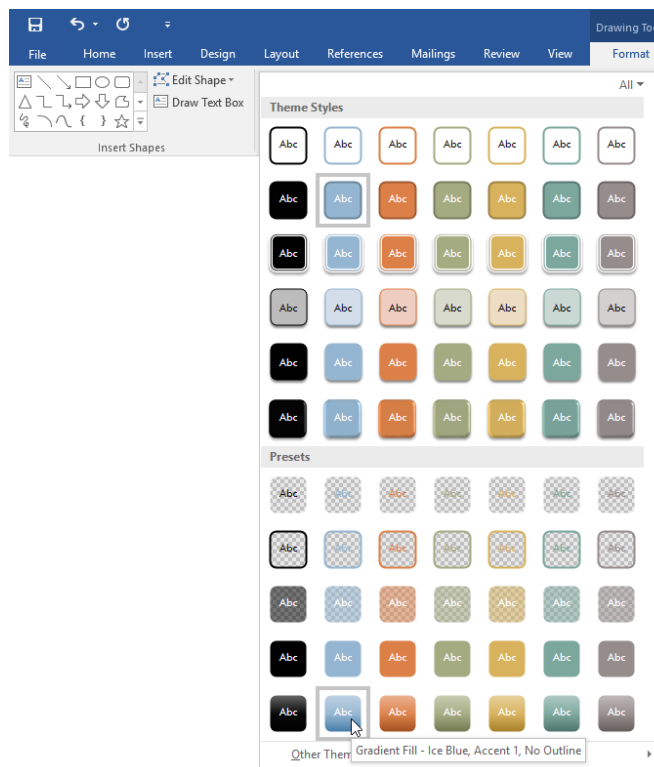
- Click and drag to draw a rectangle that is approximately the same size as the footer:



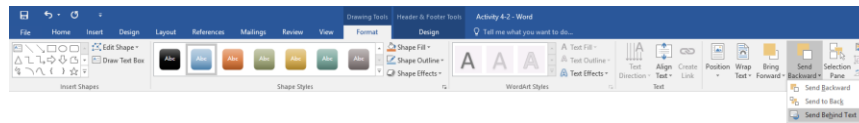
- With the rectangle selected, click the Drawing Tools – Format tab. Click the More arrow in the Shape Styles gallery:



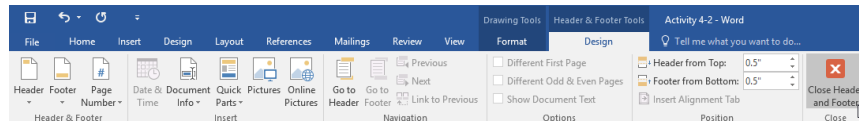
- Click the “Gradient Fill– Ice Blue, Accent 1, No Outline” style:



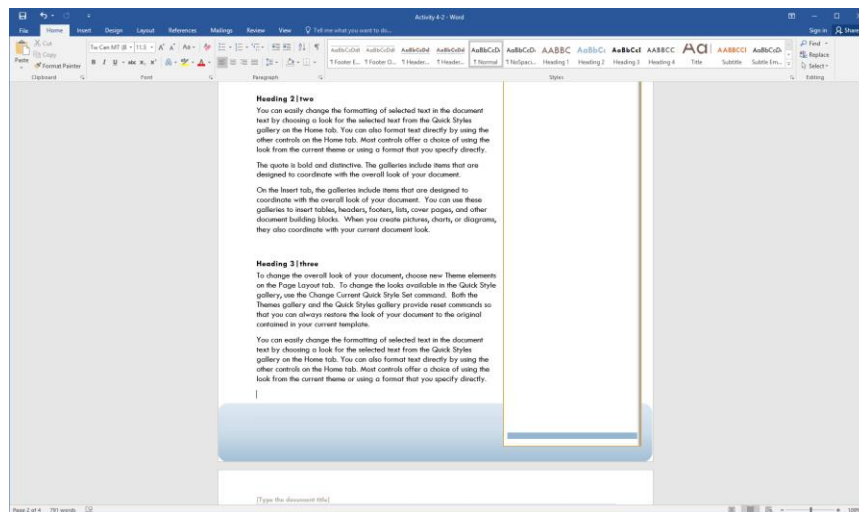
- Now, click the Send Backward arrow on the Drawing Tools – Format tab and click Send Behind Text:



- Click Header & Footer Tools – Design → Close Header and Footer:



- Check out the new footer design that you have created:



- 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.

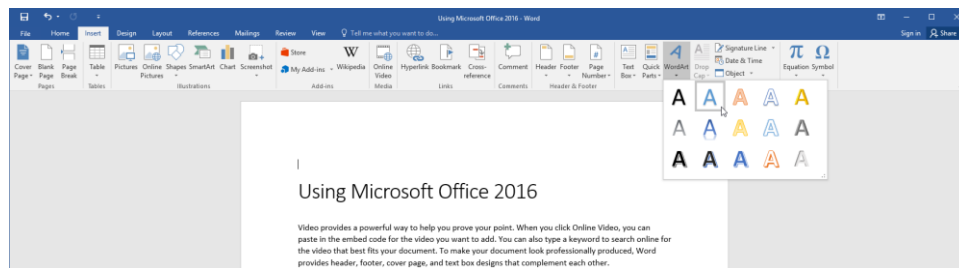
Topic Objectives

In this topic, you will learn:

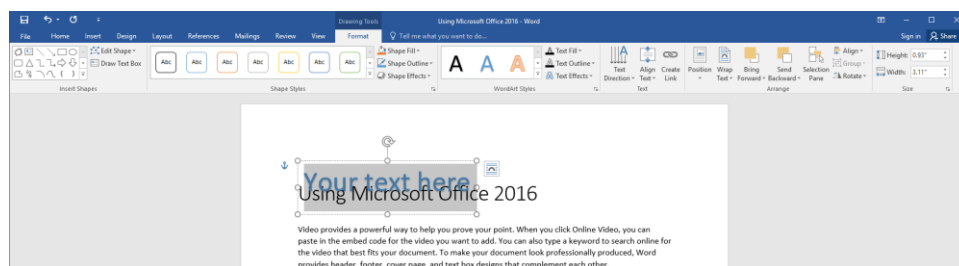
- How to insert WordArt into a document
- How to format text with drop caps

WORDART

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



Then, you will be prompted to type your text. You will also see the Drawing Tools – Format tab:

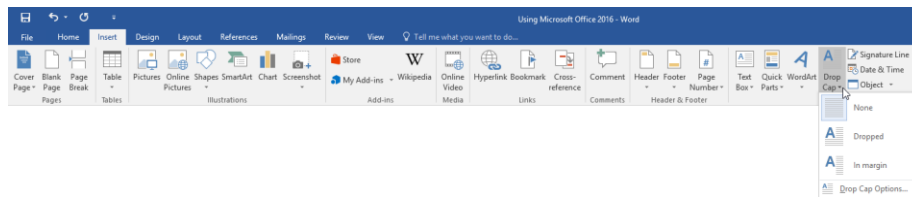


You can work with this object just like text boxes and shapes using the handles on the WordArt box and the commands on the Drawing Tools – Format tab. Note that if there is existing text in your document that you want to convert to WordArt, you can select it before performing the WordArt command.

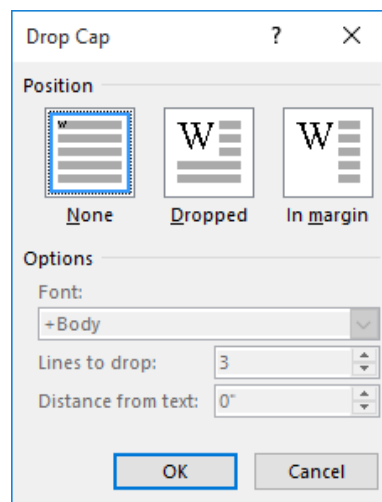
DROP CAPS

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):



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



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 → Drop Cap → None.

ACTIVITY 4-3

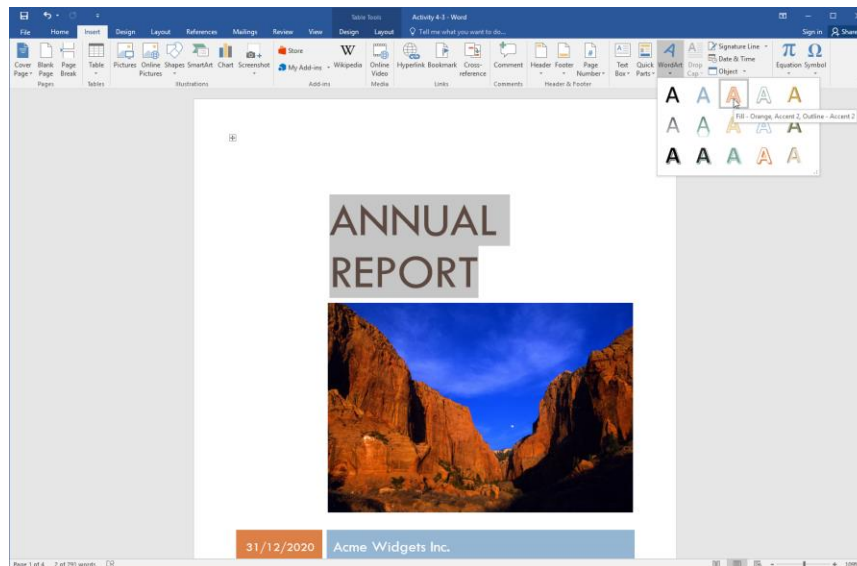
Adding WordArt and Other Text Effects

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

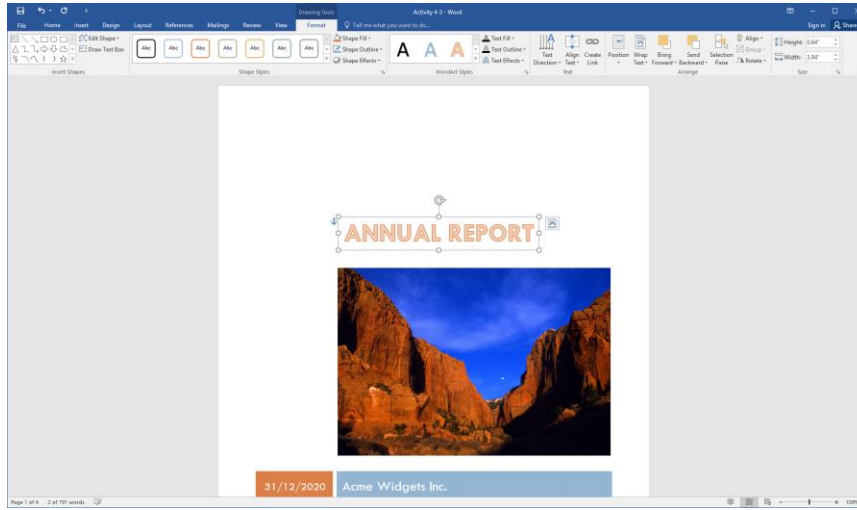
1. Open Microsoft Word 2016 and open Activity 4-3:



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:



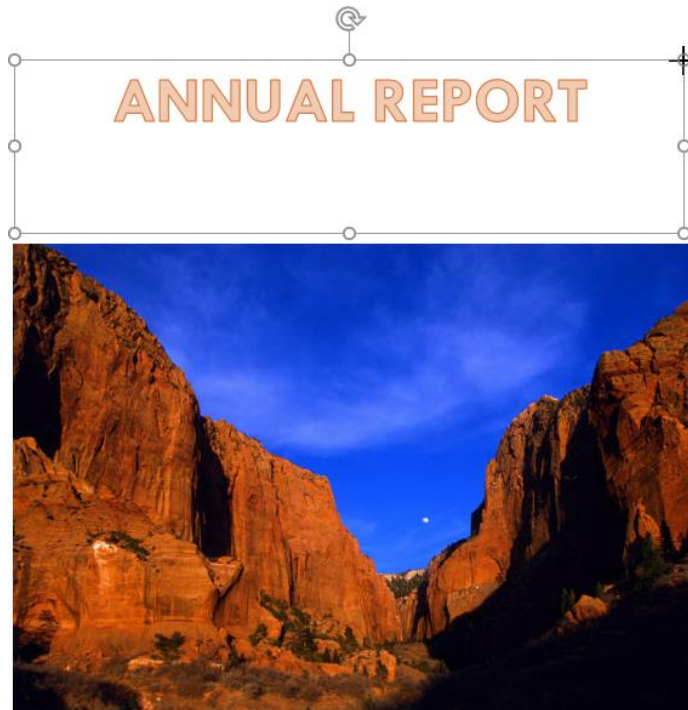
4. Click the Layout Options button beside the WordArt:



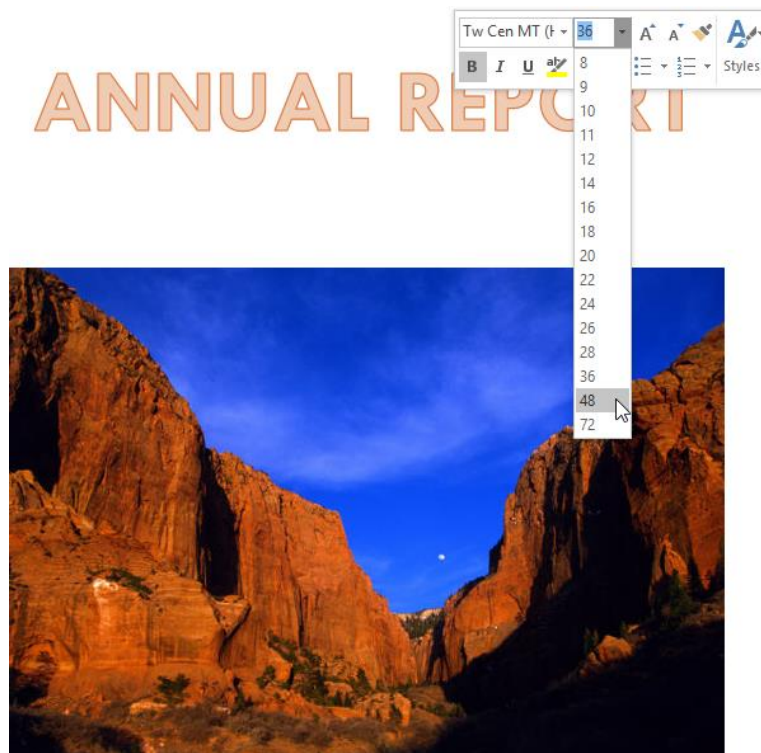
5. Click the “Fix position on page” radio button:



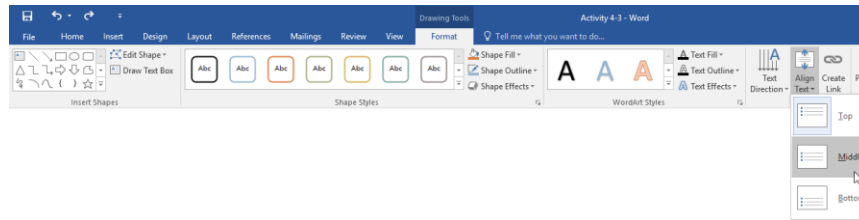
- Click and drag the top right-hand corner handle of the WordArt up and out so that the box is about the same length as the image and about 1.5 inches tall:



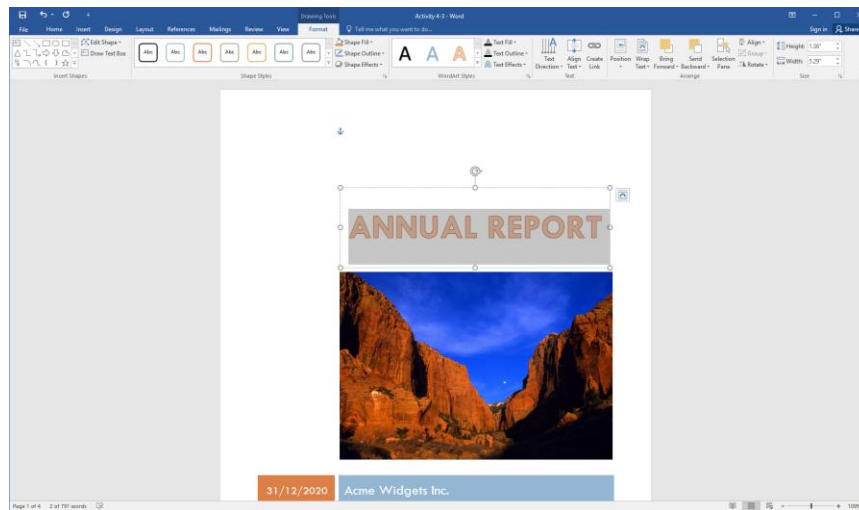
- Select the text in the WordArt box. Use the mini toolbar to increase the font size to 48:



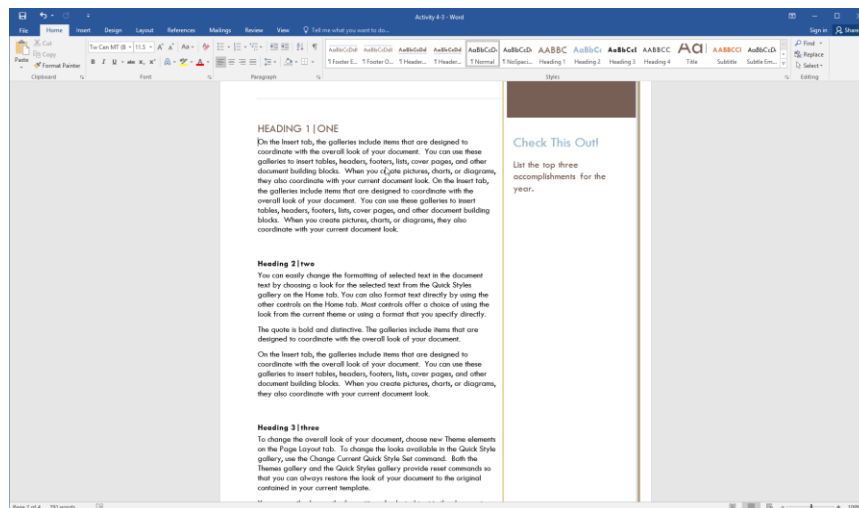
8. Now, click Drawing Tools – Format → Align Text → Middle:



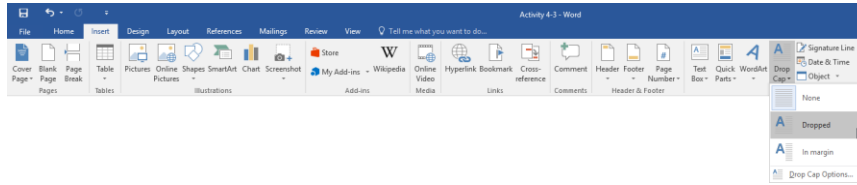
9. Your cover page should now look like this:



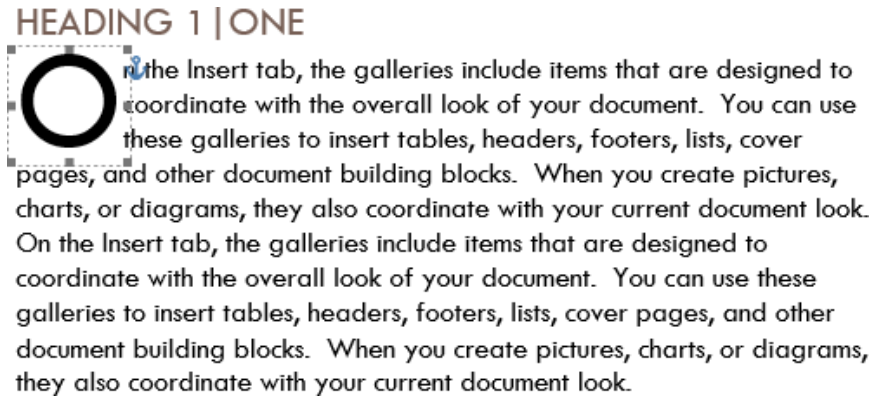
10. Scroll to the second page of the document. Click to place your cursor inside the first paragraph of this page:



11. Click Insert → Drop Cap → Dropped:



12. Here is the result:



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

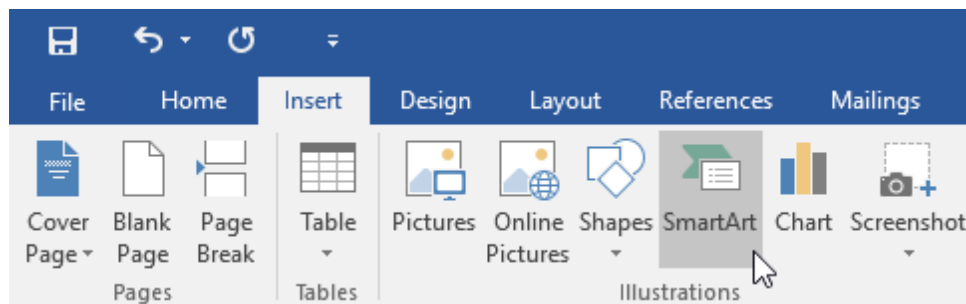
SMARTART GRAPHICS

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

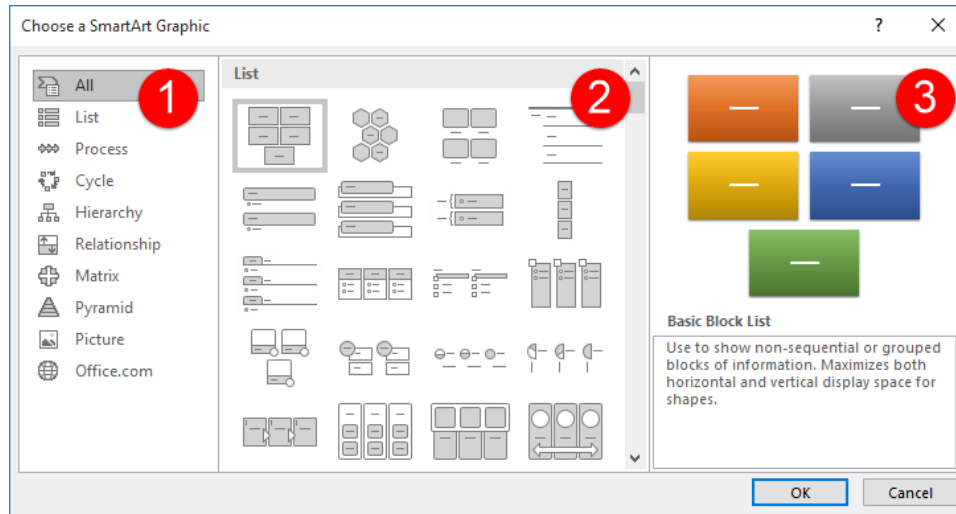
Like other objects, SmartArt designs coordinate with your current theme. As well, there are many different design, color, and layout options available so that you can choose the right style for each document.

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 → SmartArt:

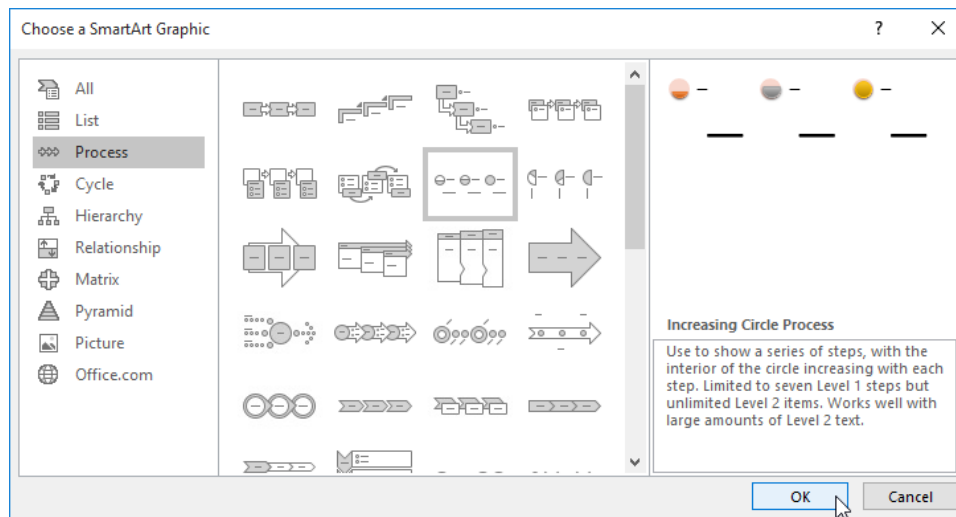


The Choose a SmartArt Graphic dialog will open:

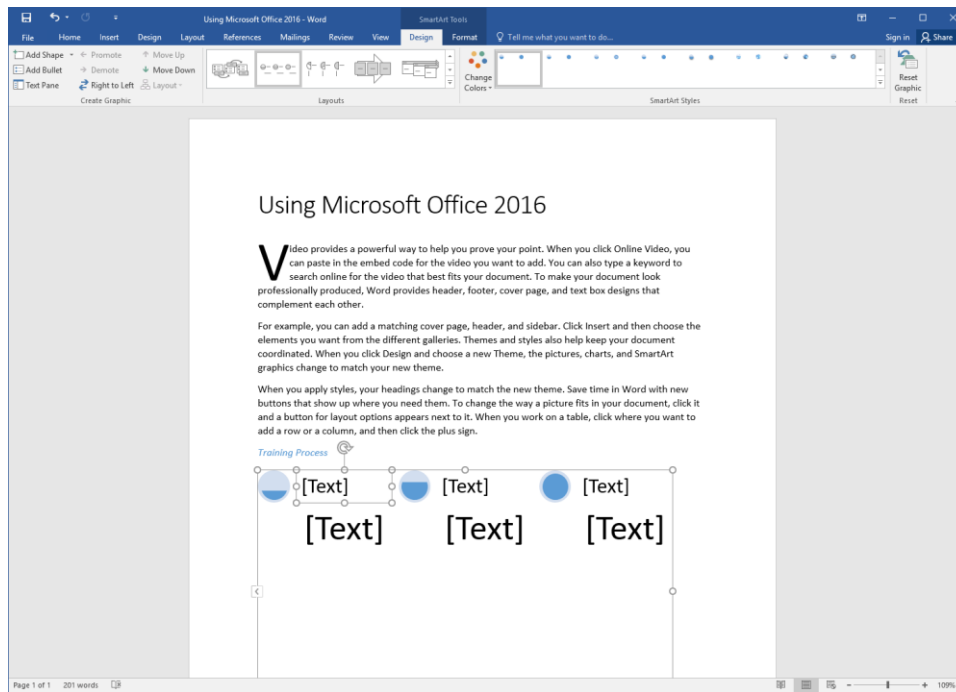


First, choose a **category (1)** from the list on the left. Then, choose a **specific diagram type (2)** to view **additional details** about it and a preview in the pane on the right **(3)**.

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

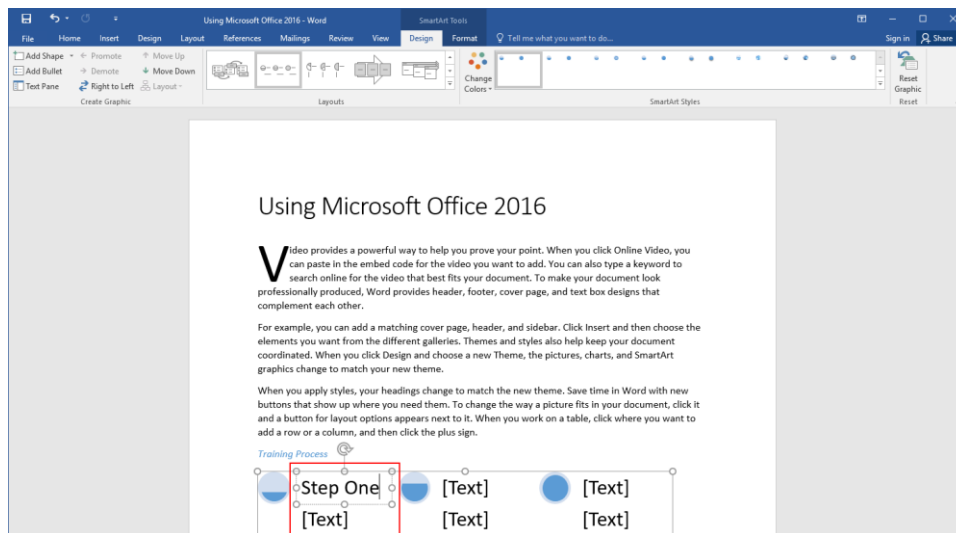


Now, the diagram will appear in your document:

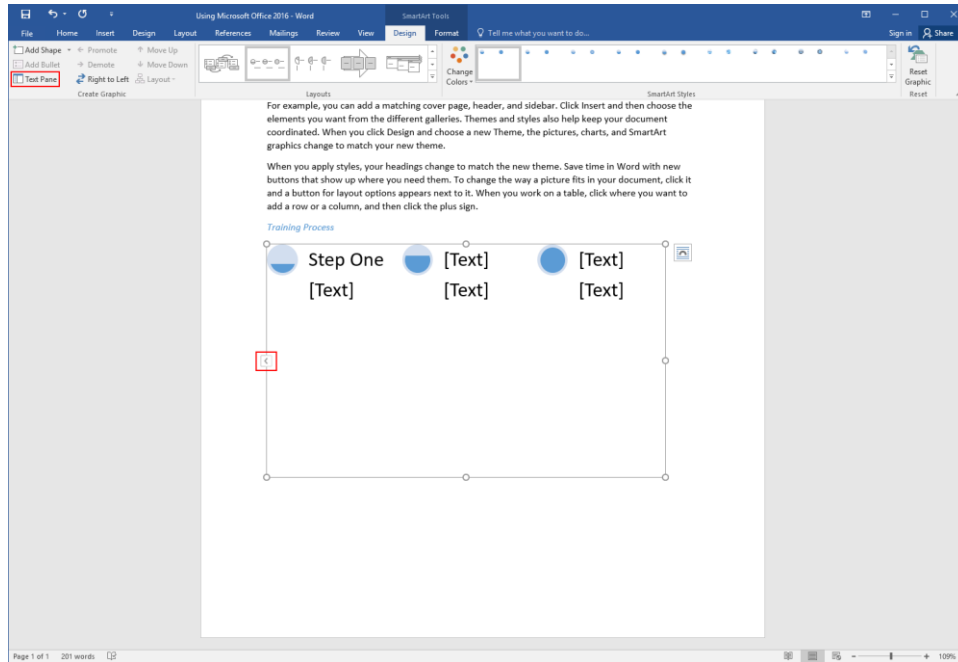


ADDING TEXT AND IMAGES TO THE DIAGRAM

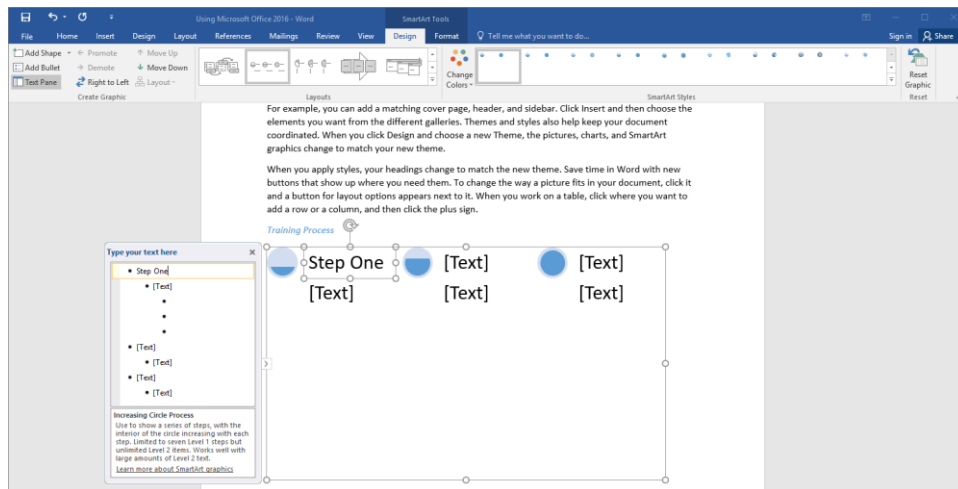
To add text to the diagram, click where it says [Text] and type:



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 → Text Pane:



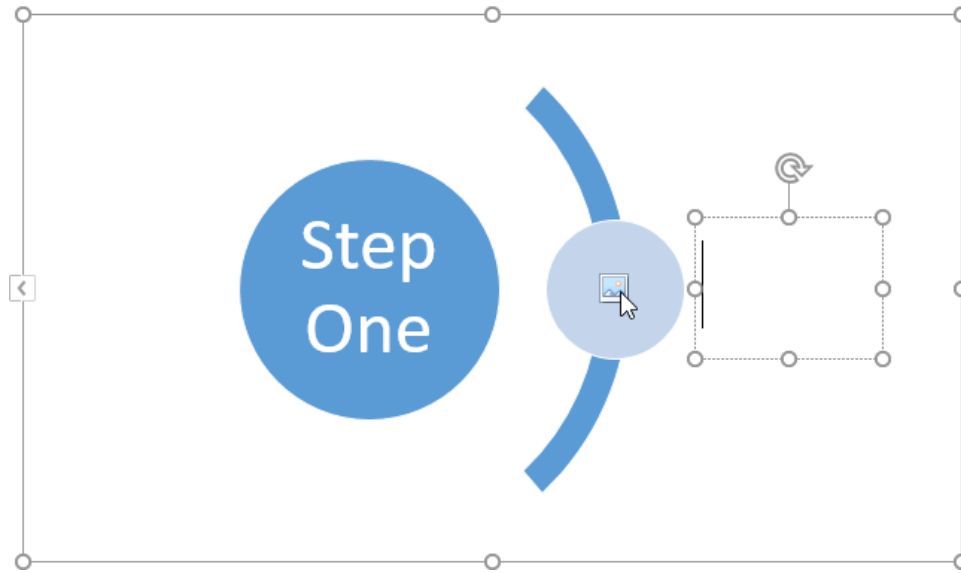
The Text pane will now be displayed. Click and type to enter the diagram's information:



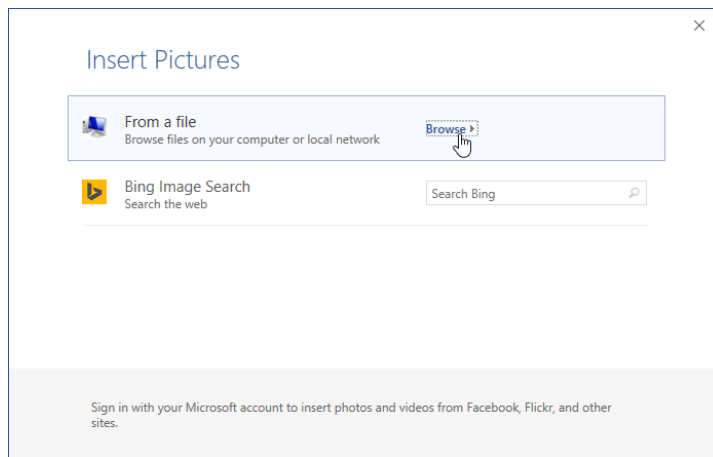
You can press Tab to demote items or Shift + Tab to promote them. Microsoft Word will adjust the size of the text and the diagram as you add more information. Note that different diagrams support different numbers of shapes and sub-shapes; Word will let you know if you exceed the supported amount.

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

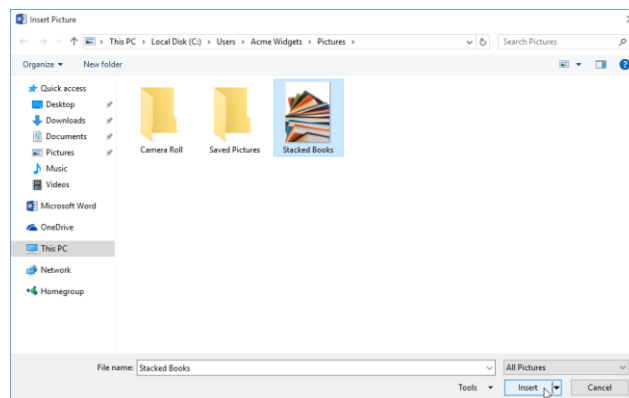
Training Process



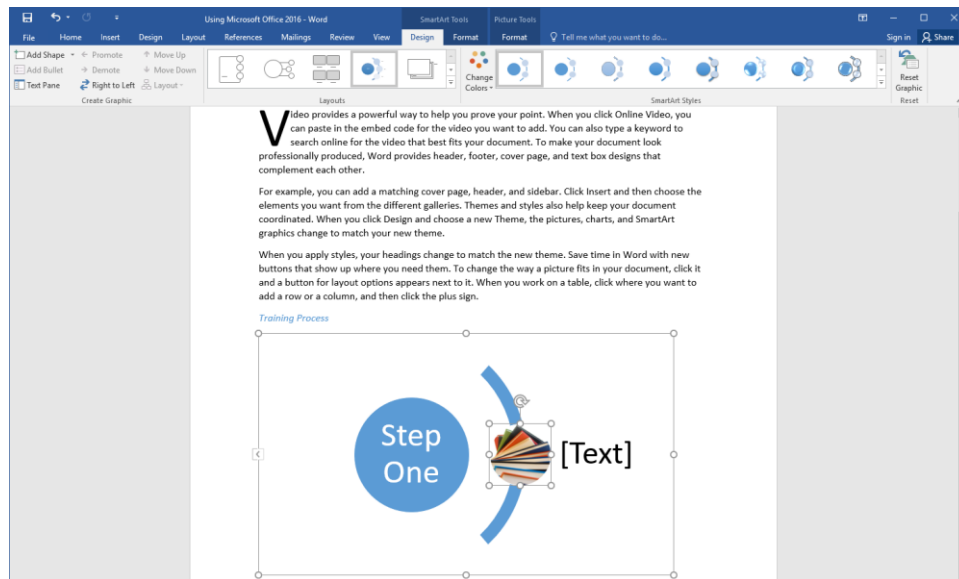
The Insert Pictures dialog box will open. You can click Browse to choose an image from your computer, or browse the Internet for an image. For this example, we will choose a local image:



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.	<ul style="list-style-type: none"> ▪ N/A
List	Present blocks of information.	<ul style="list-style-type: none"> ▪ Basic Block List ▪ Square Accent List
Process	Outline steps in a process or workflow.	<ul style="list-style-type: none"> ▪ Funnel ▪ Converging Text
Cycle	Show a continuous sequence of steps.	<ul style="list-style-type: none"> ▪ Cycle Matrix ▪ Gear ▪ Radial Venn
Hierarchy	Present hierarchical information, like an organization chart.	<ul style="list-style-type: none"> ▪ Organization Chart ▪ Hierarchy ▪ Lined List

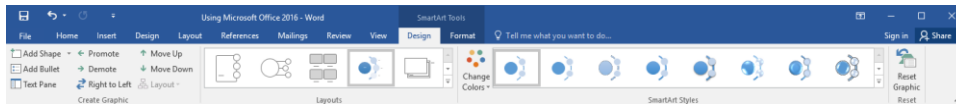
Relationship	Show how different elements are connected to each other.	<ul style="list-style-type: none"> ▪ Basic Venn ▪ Gear
Matrix	Illustrate how different parts relate to the whole.	<ul style="list-style-type: none"> ▪ Basic Matrix ▪ Titled Matrix
Pyramid	Present proportional relationships, like the food pyramid.	<ul style="list-style-type: none"> ▪ Basic Pyramid ▪ Segmented Pyramid
Picture	Lists all diagram types that include image placeholders.	<ul style="list-style-type: none"> ▪ Spiral Picture ▪ Accented Picture
Office.com	Lists diagrams available from Office.com. As such, this category may change at any time.	<ul style="list-style-type: none"> ▪ Vertical Bracket List ▪ Theme 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:

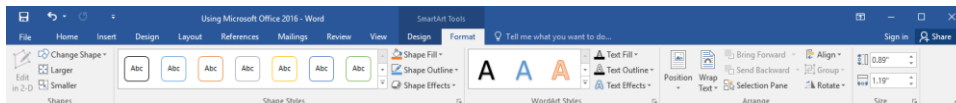


The groups on this tab are:

- **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:

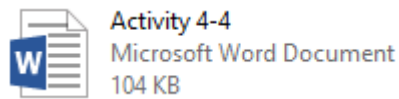
- **Shapes group:** Change the selected shape, or make it larger or smaller.
- **Shape Styles group:** Customize the appearance of the shape.
- **WordArt Styles group:** Customize the text in the shape.
- **Arrange group:** Arrange the shapes and objects in the graphic.
- **Size group:** Enter specific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

ACTIVITY 4-4

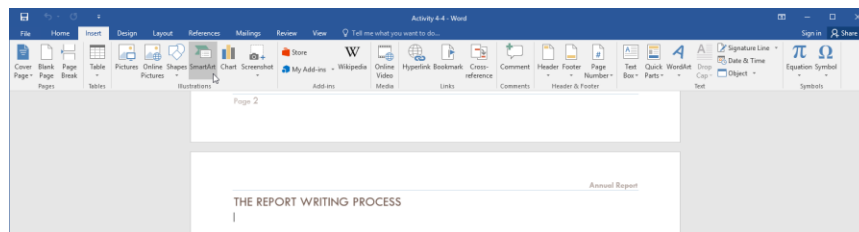
Creating Complex Illustrations with SmartArt

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

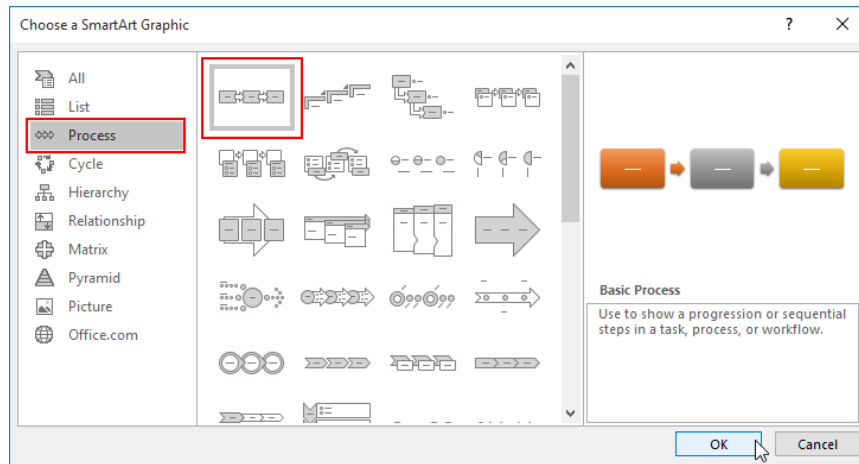
1. Open Microsoft Word 2016 and open Activity 4-4:



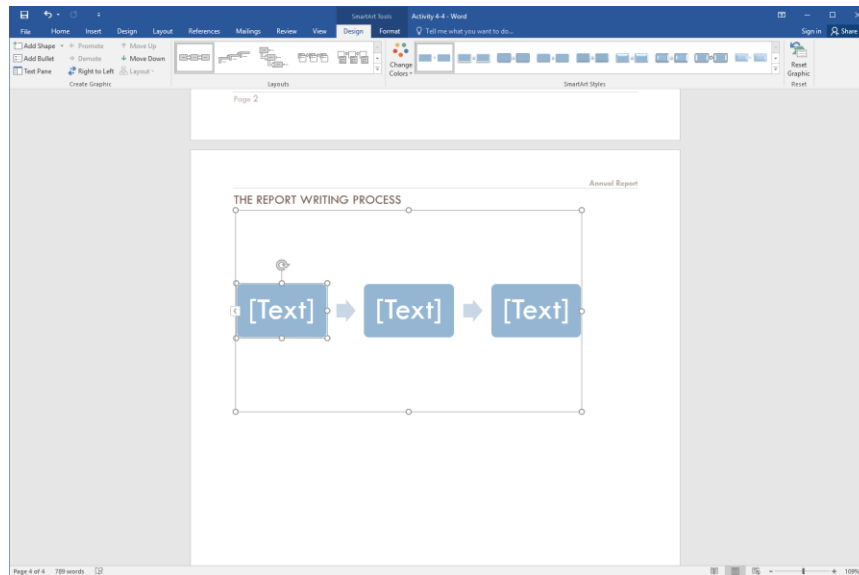
2. Press Ctrl + End to go to the last line of the document: a blank line after “The Report Writing Process” header. Then, click Insert → SmartArt:



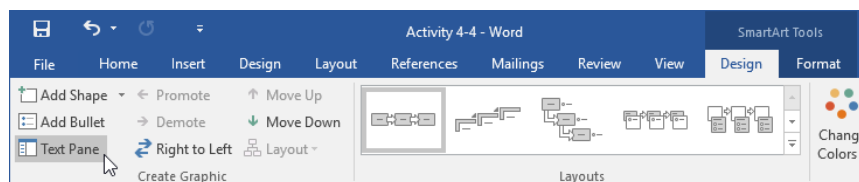
3. The Choose a SmartArt Graphic dialog box will open. Click the Process category. Ensure that the first diagram type (Basic Process) is selected and click OK:



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

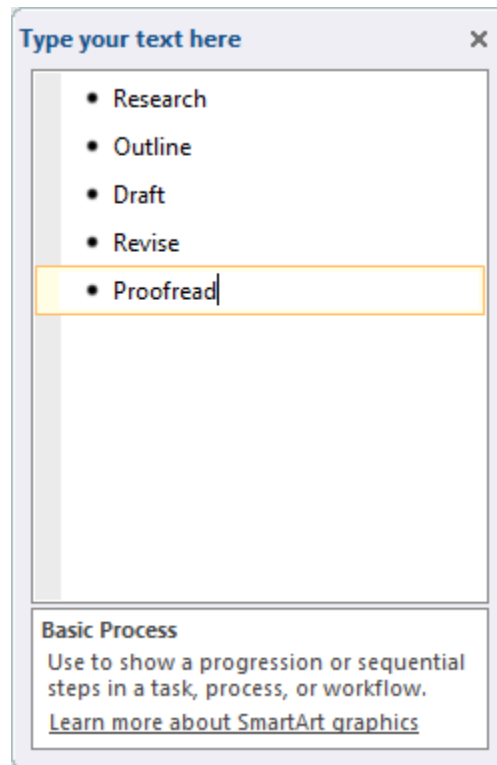


5. If the Text pane is not currently shown, click SmartArt Tools – Design → Text Pane:

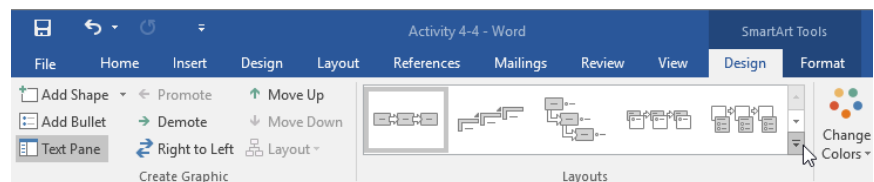


(If the Text pane is already displayed, skip to the next step.)

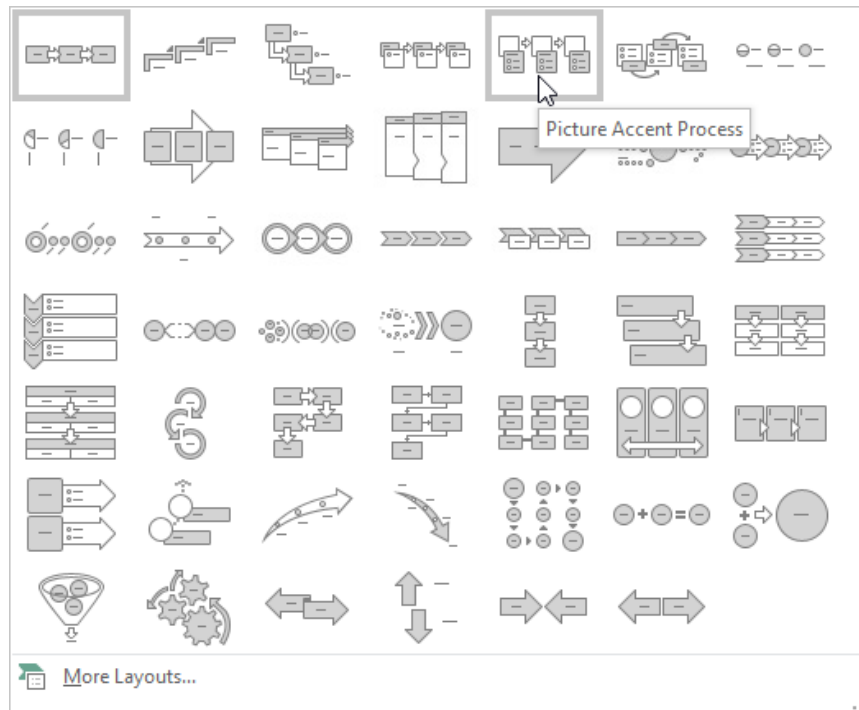
6. Fill out the Text pane as shown below, and then close it:



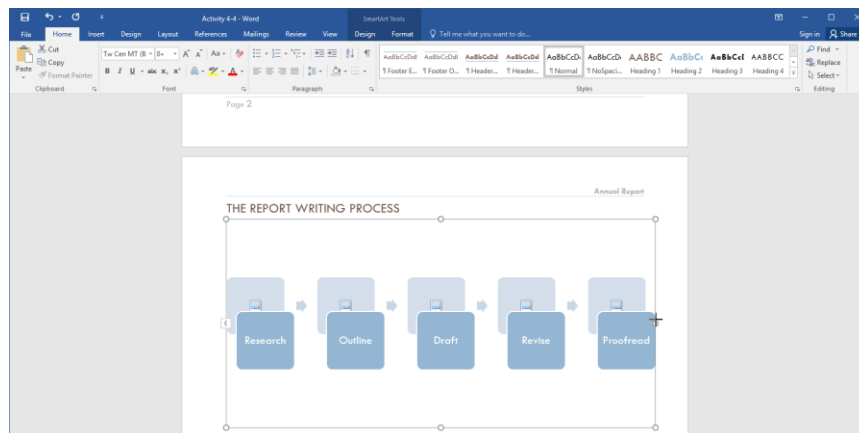
7. This diagram is pretty plain. Let's change the layout so that we can add some images. Click the More arrow in the Layouts gallery on the SmartArt Tools → Design tab:



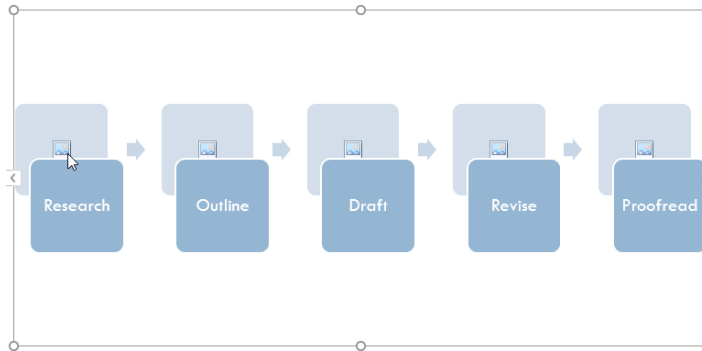
8. Mouse over some of the different layouts that are available. When you are ready, click Picture Accent Process:



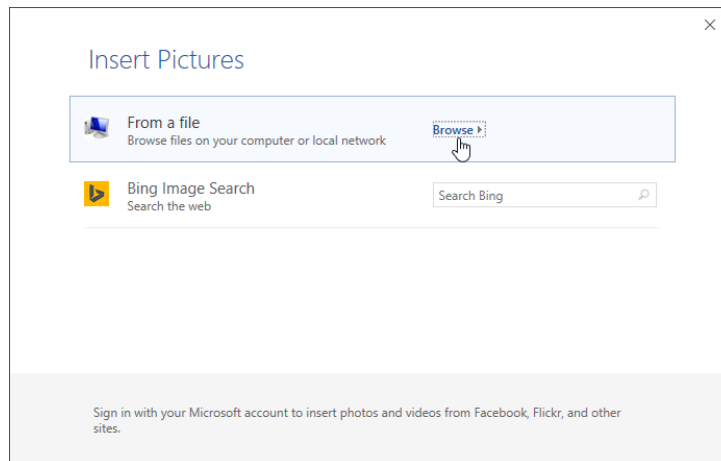
9. Click the outer border of the SmartArt diagram. Drag the right edge outwards to make it bigger:



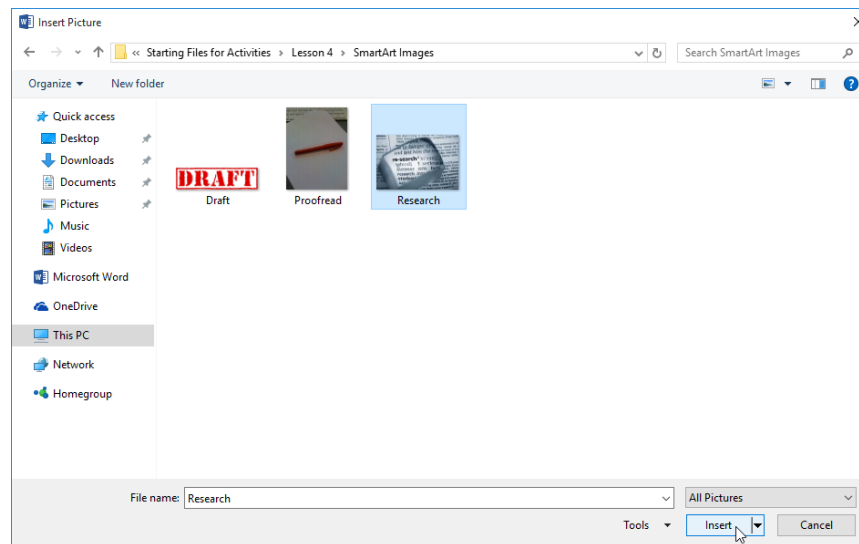
10. Now, click the picture placeholder for the first item in the diagram:



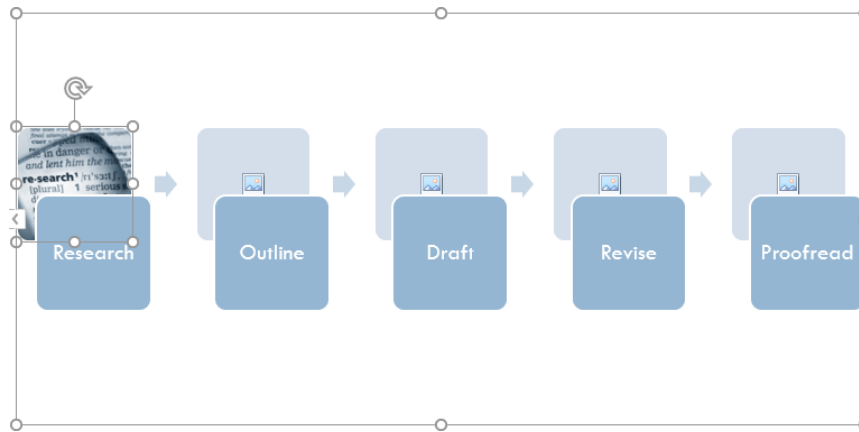
11. In the Insert Pictures dialog box, click Browse to choose a local image:



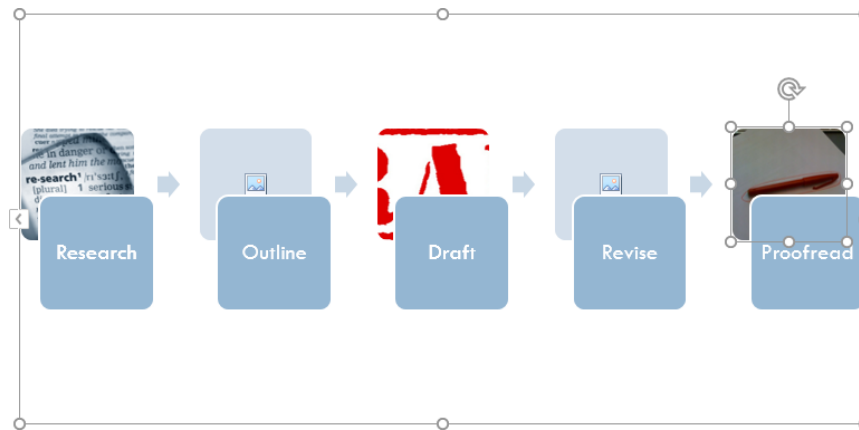
12. The Insert Picture dialog box will open. Browse to Lesson 4 of your Exercise Files and open the SmartArt Images folder. Select the Research image and click Insert:



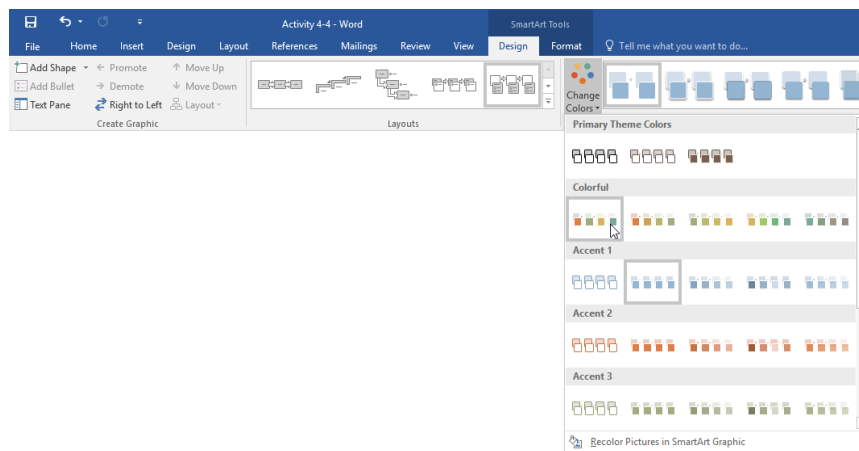
- 13. The image will be inserted and resized:



- 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:



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.

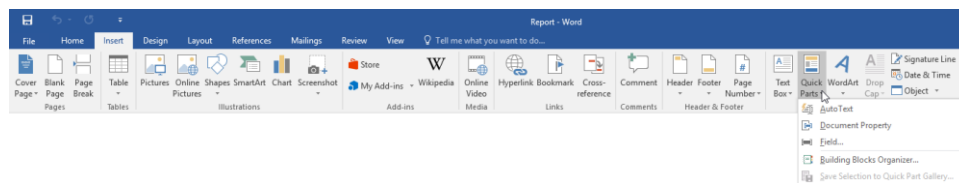
Topic Objectives

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 → Quick Parts:



The options are:

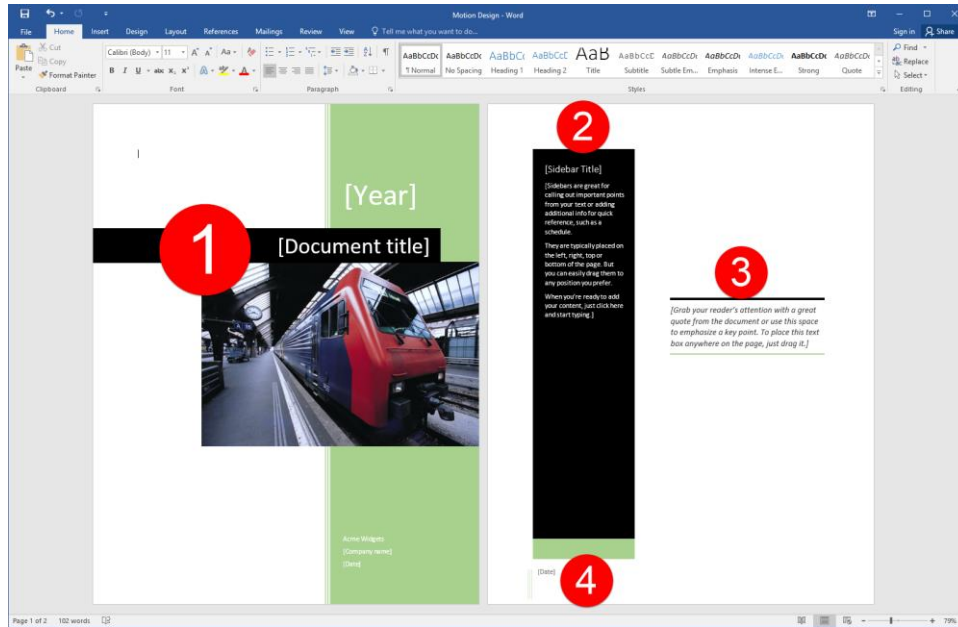
- **AutoText:** Customizable pieces of text that you can save for re-use, like a company motto or favorite saying.
- **Document Property:** Controls with information about the document (based on file properties).
- **Field:** Controls that can automatically update information, like index entries or the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

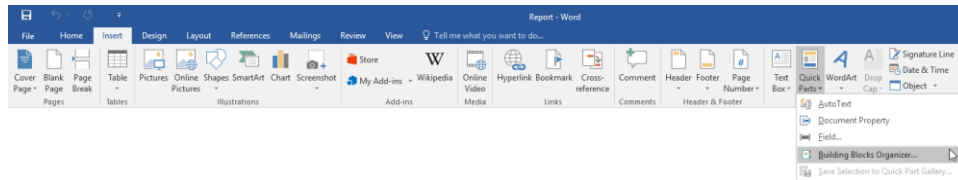
As we mentioned earlier, **building blocks** are pre-formatted elements that can be combined to create a cohesive look for a document. As well, they are integrated with themes and styles so they can be updated quickly and easily.

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

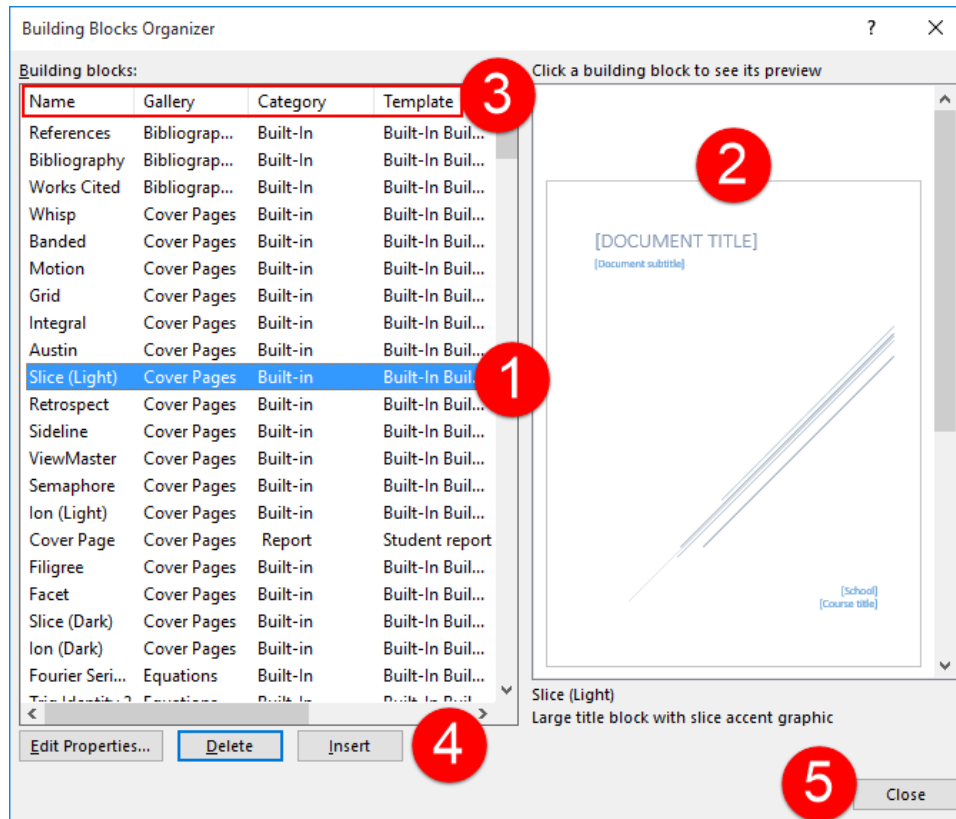


THE BUILDING BLOCKS ORGANIZER DIALOG BOX

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:



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.

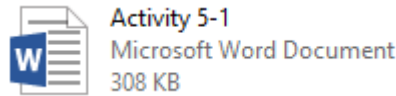
When you have finished working with the Building Blocks Organizer, click **Close (5)**.

ACTIVITY 5-1

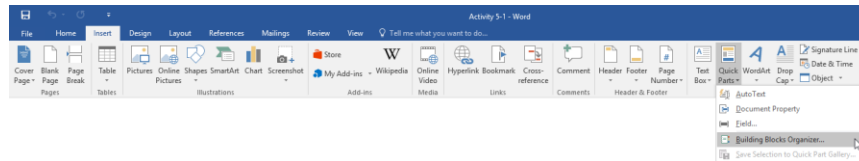
Inserting Building Blocks and Quick Parts

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:

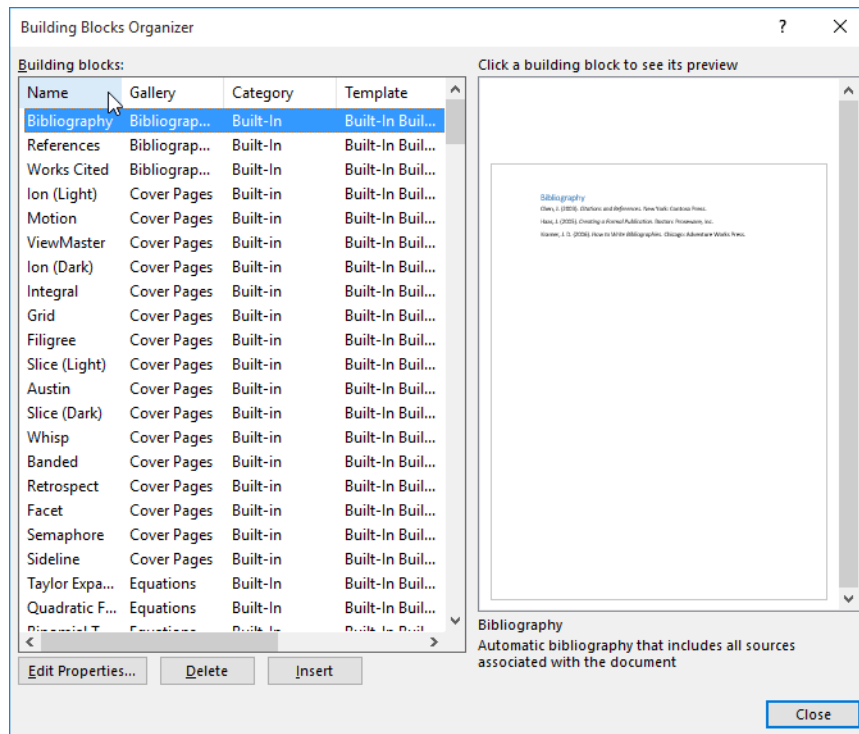


2. Let's see what kinds of building blocks we can add to this document. Click Insert → Quick Parts → Building Blocks Organizer:

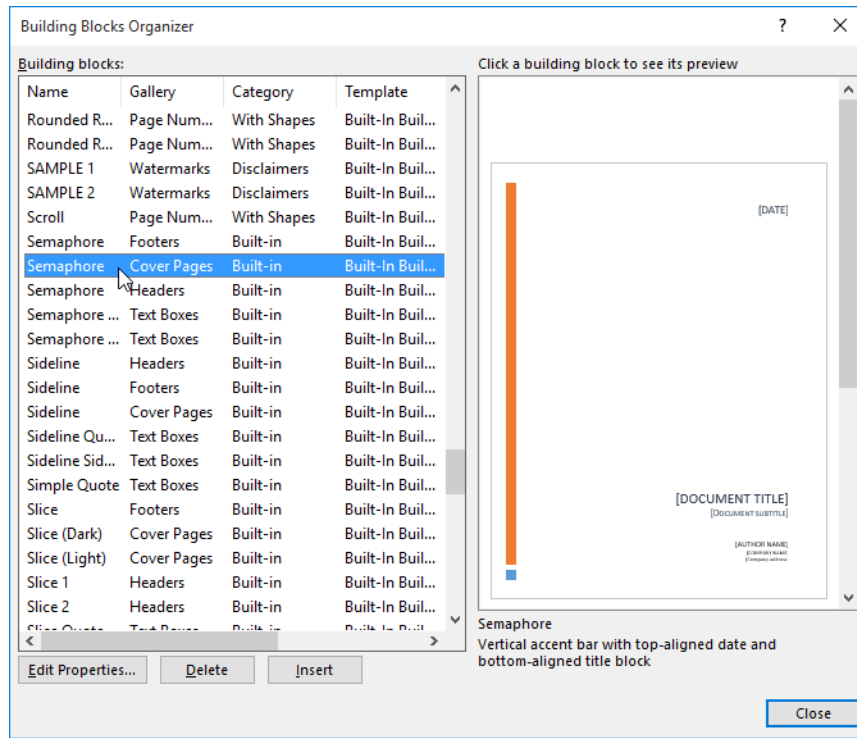


(You may need to click inside the document to make this command available.)

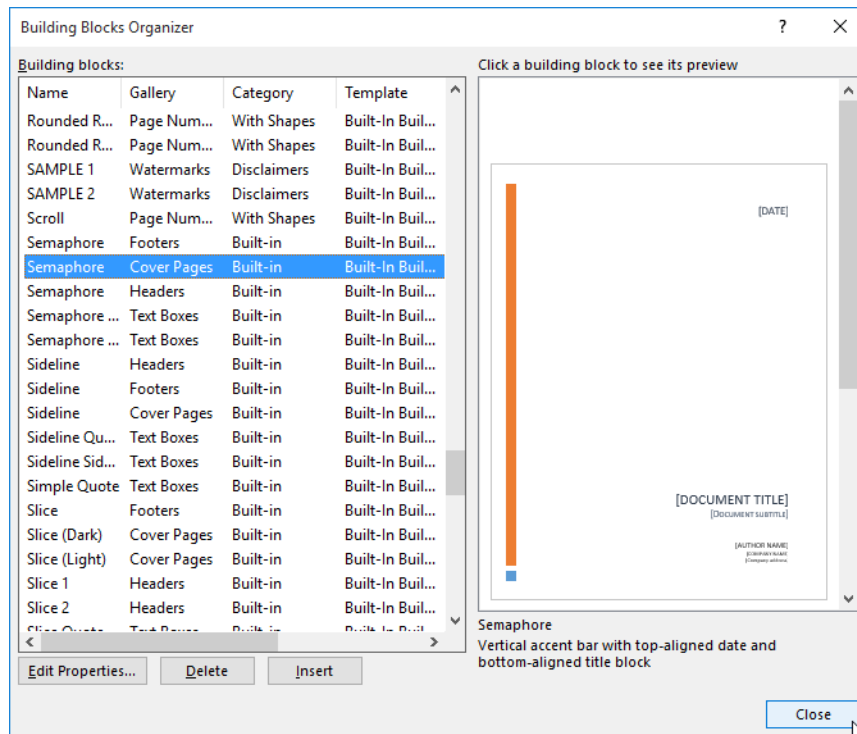
3. In the Building Blocks Organizer dialog, click the Name header to sort by that field:



4. Scroll through the list of building blocks and click some of the entries to see a preview. The Semaphore building block look nice:



5. Close the Building Blocks Organizer:

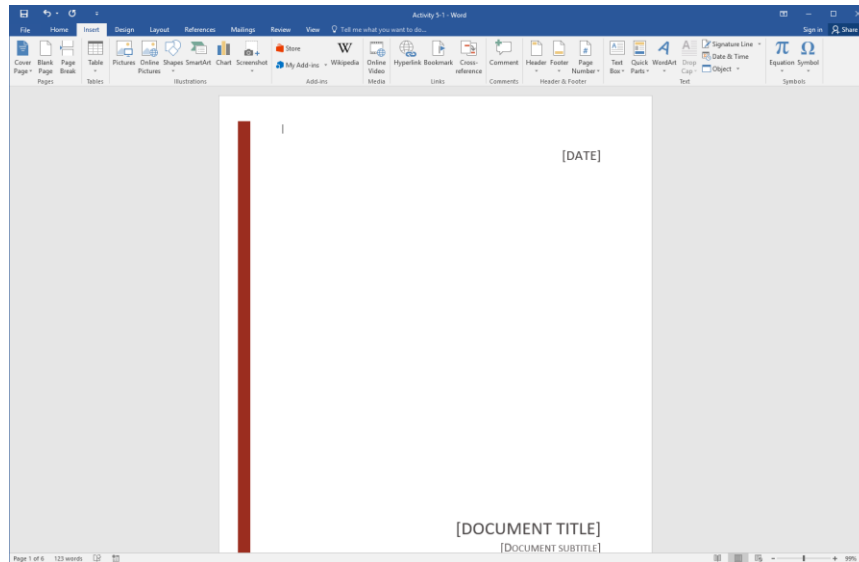


6. Now, let's add a cover page building block. Click Insert → Cover Page → Semaphore:

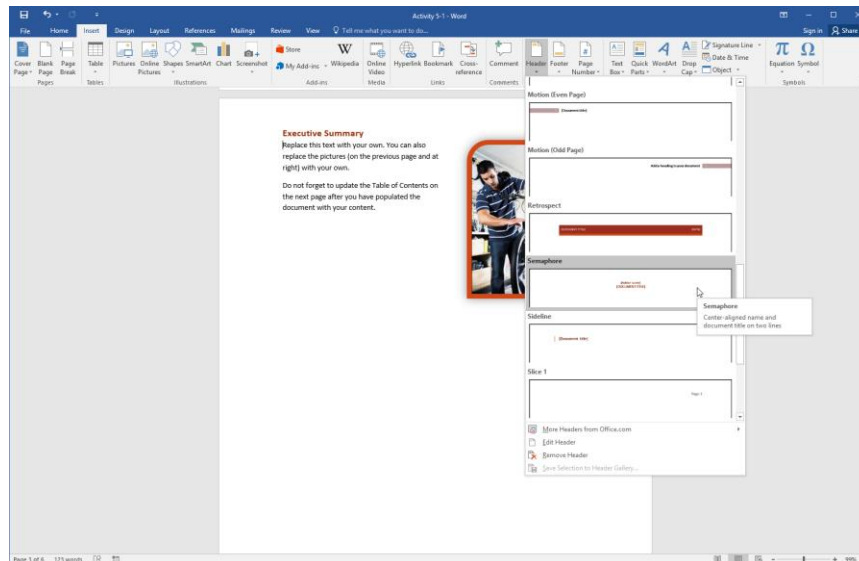


(You may need to scroll down in the menu to see this cover page.) You can see that the color already reflects the document's theme.

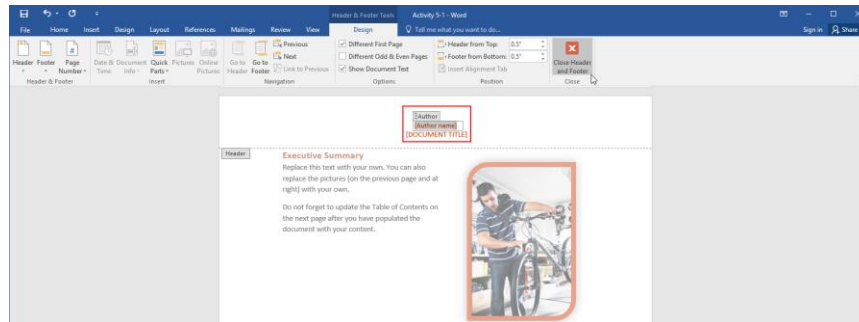
7. The cover page will be inserted:



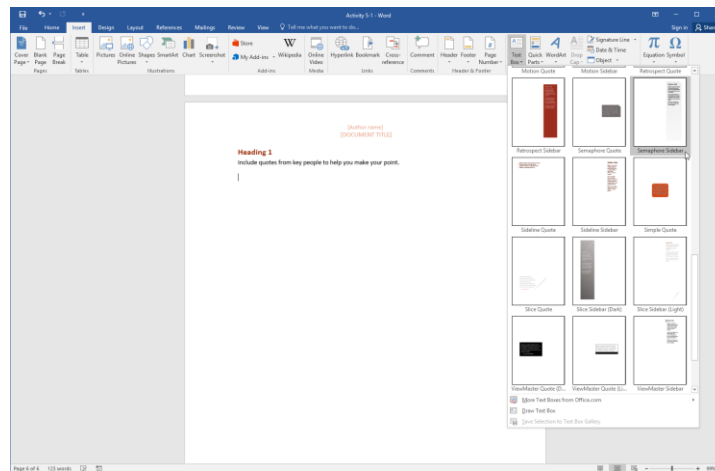
8. Now let's see if there is a matching header. Scroll to the third page of the document and click to place your cursor there. Click Insert → Header → Semaphore:



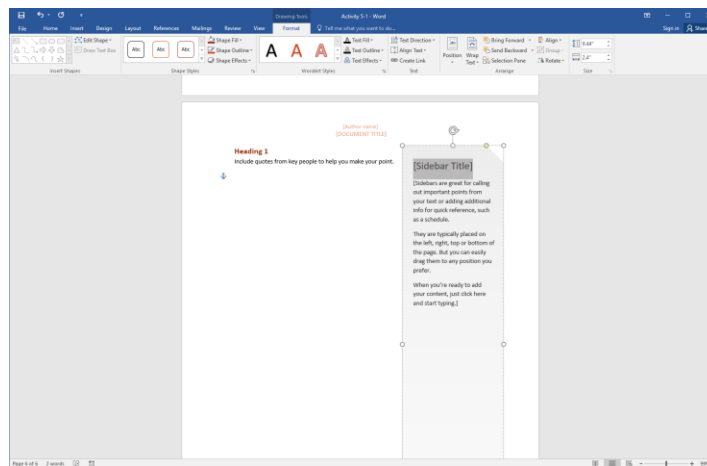
9. Review the new header. Then, close Header and Footer view:



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



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

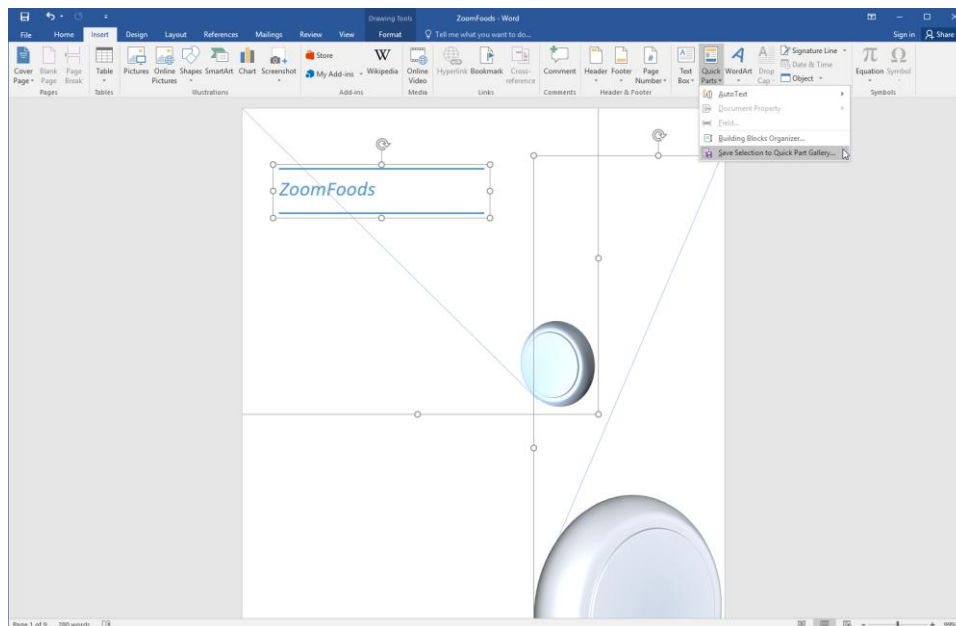
In this topic, you will learn:

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

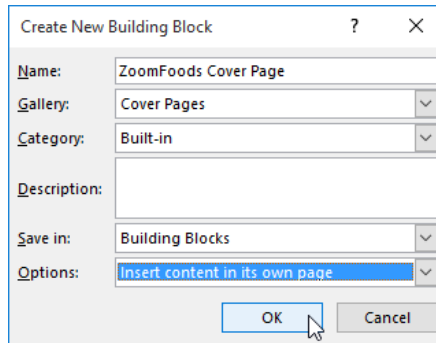
THE CREATE NEW BUILDING BLOCKS DIALOG BOX

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 → Quick Parts → Save Selection to Quick Part Gallery:

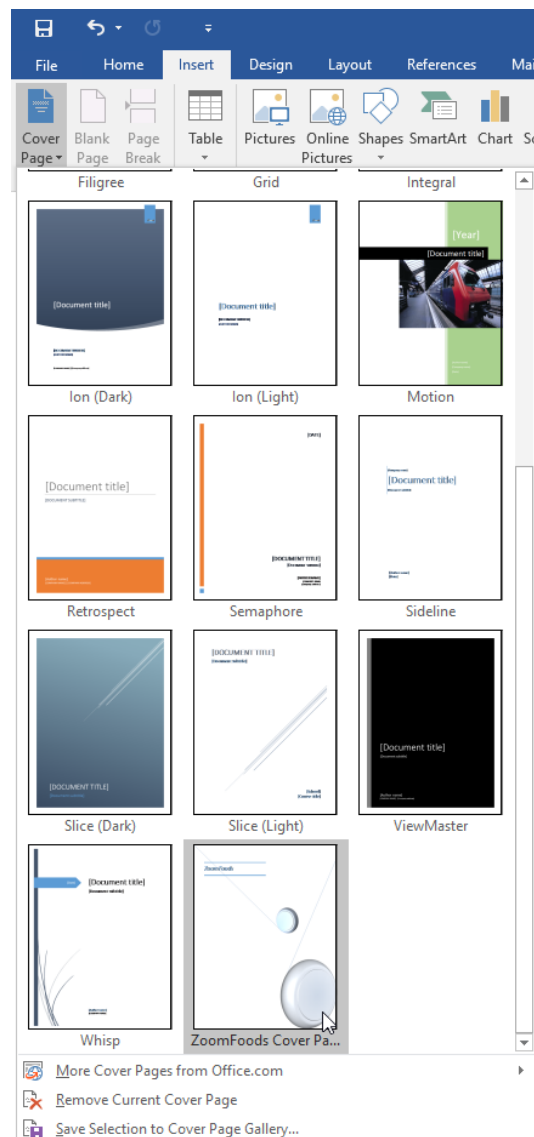


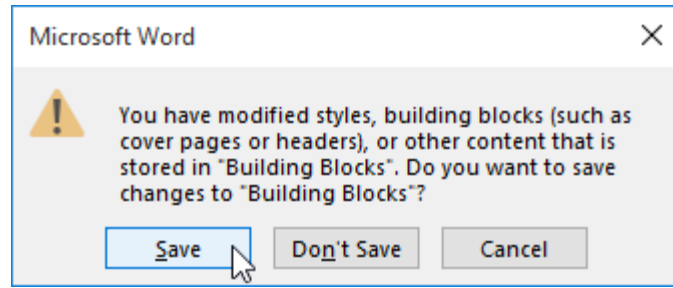
The Create New Building Block dialog box will open. Set your options and click OK:



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:

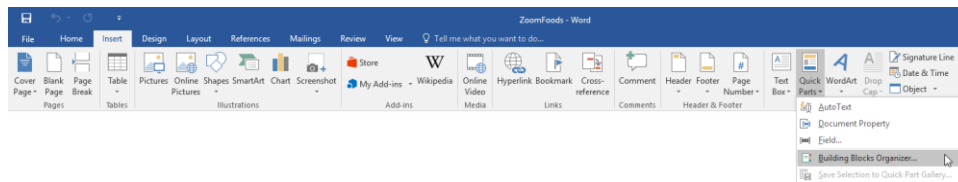




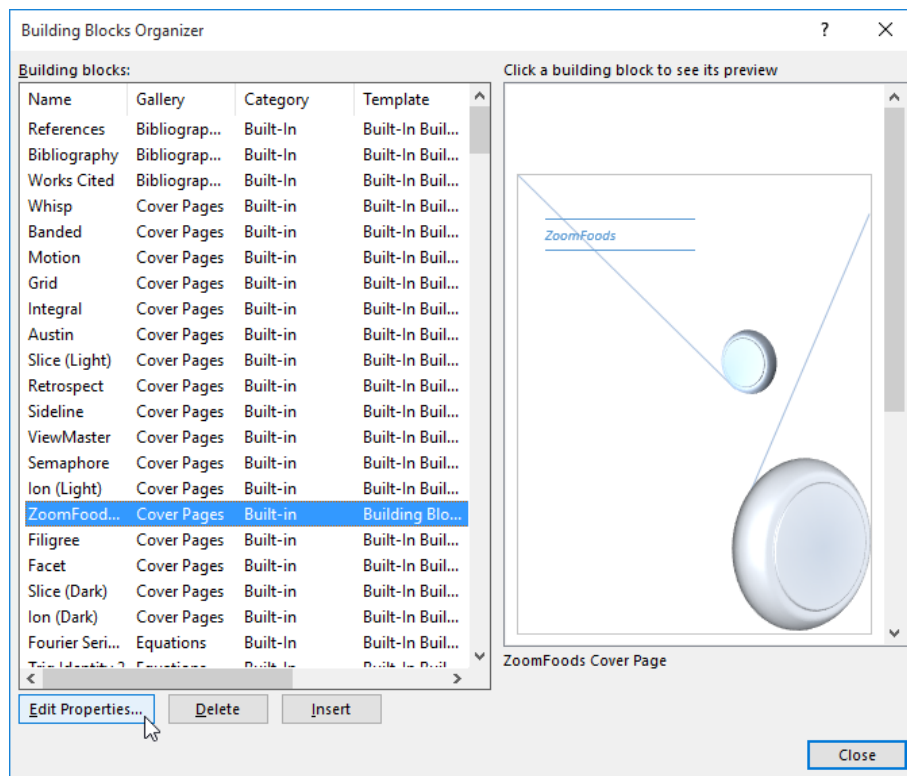
Be sure to click Save or your changes will be discarded.

BUILDING BLOCK MODIFICATION OPTIONS

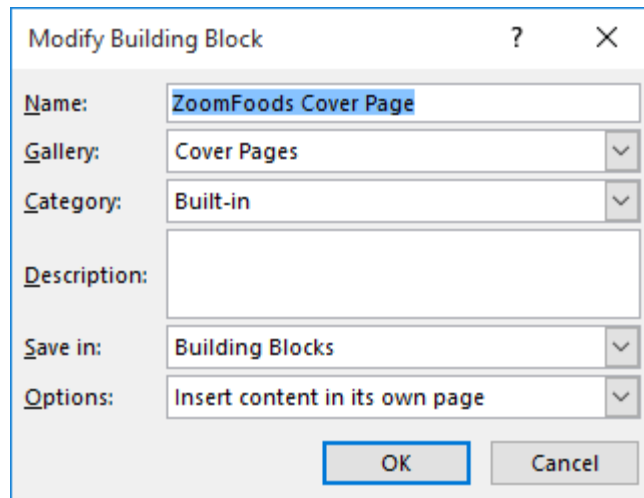
To modify a building block, click Insert → Quick Parts → Building Block Organizer:



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

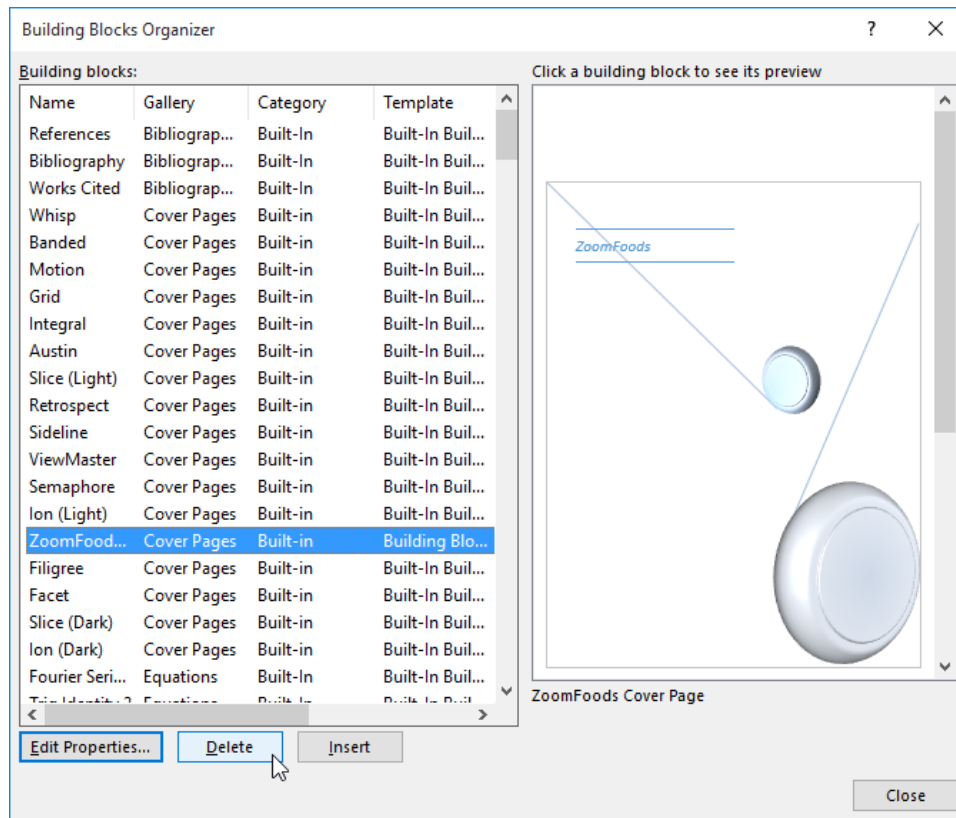


Now, you can modify the options that you originally set when creating the building block:



Click OK to save your changes.

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



COPYING BUILDING BLOCKS BETWEEN DOCUMENTS

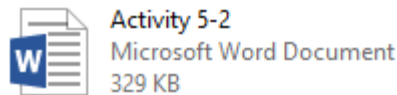
As long as you have saved the building block to the default Building Blocks template, it will be available to add to any document using the normal commands. You can also copy and paste Building Block content between documents just like regular document content.

ACTIVITY 5-2

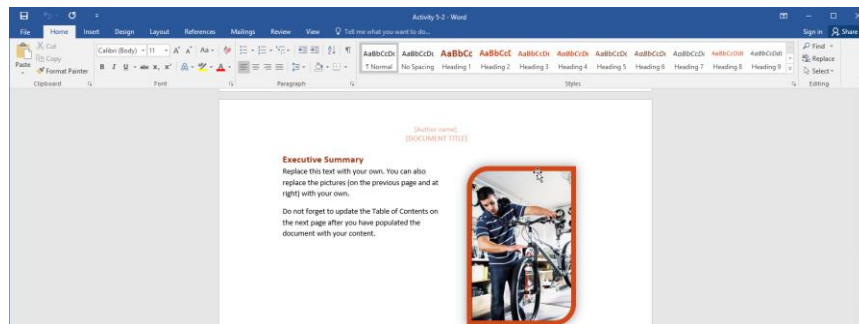
Creating and Modifying Building Blocks

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

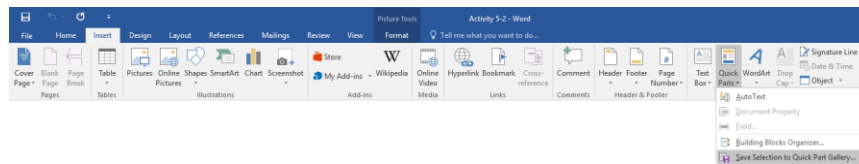
1. Open Microsoft Word 2016 and open Activity 5-2:



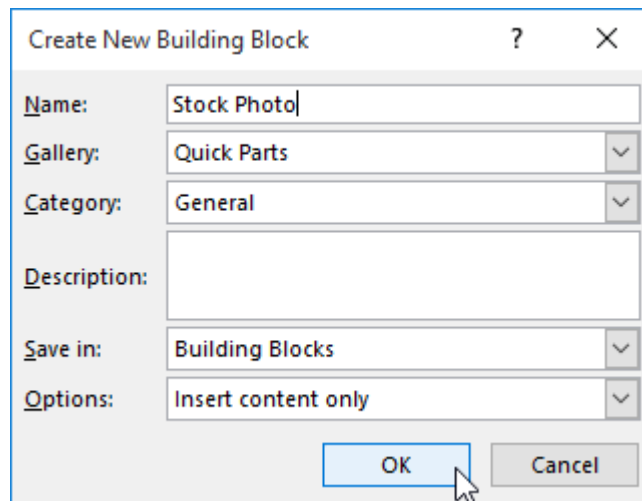
2. Scroll to the third page of the sample document. Click the photo to select it:



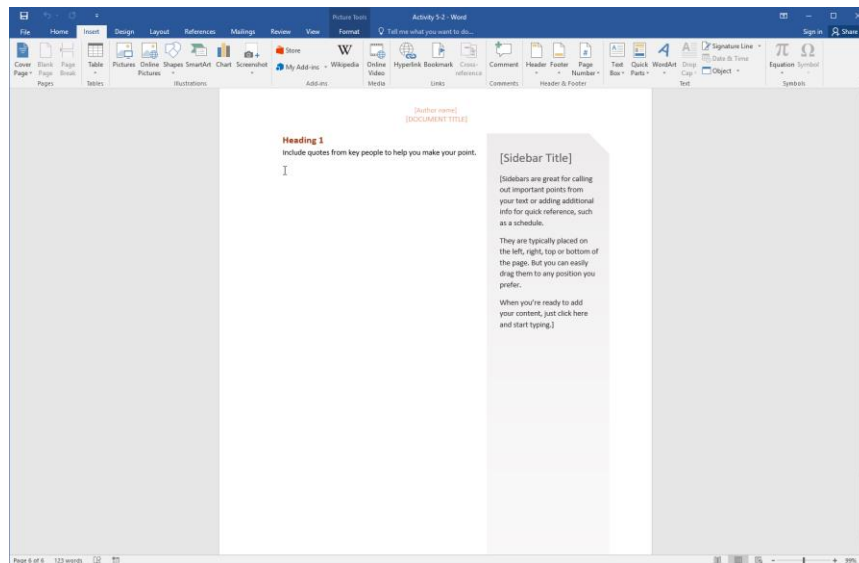
3. Now, click Insert → Quick Parts → Save Selection to Quick Part Gallery:



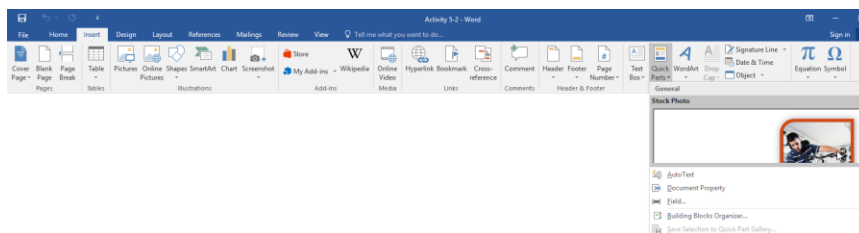
4. The Create New Building Block dialog will open. Enter “Stock Photo” as the name and click OK:



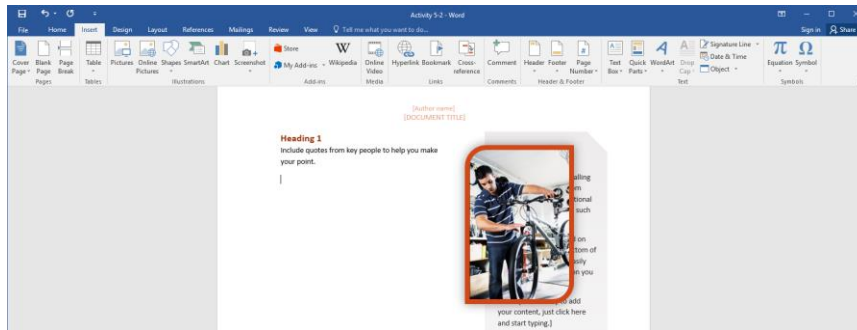
5. Scroll to the last page of the document and click to place your cursor on the last line:



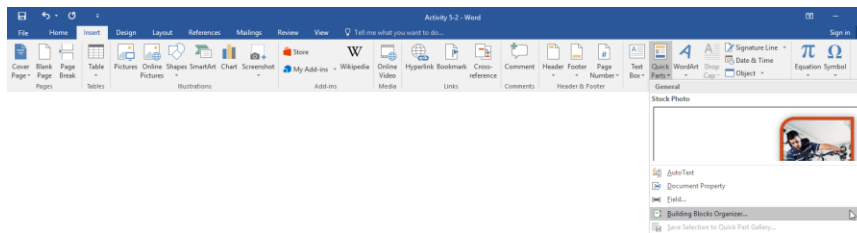
6. Click Insert → Quick Parts. You will see our stock photo listed at the top of the gallery. Click it to insert it:



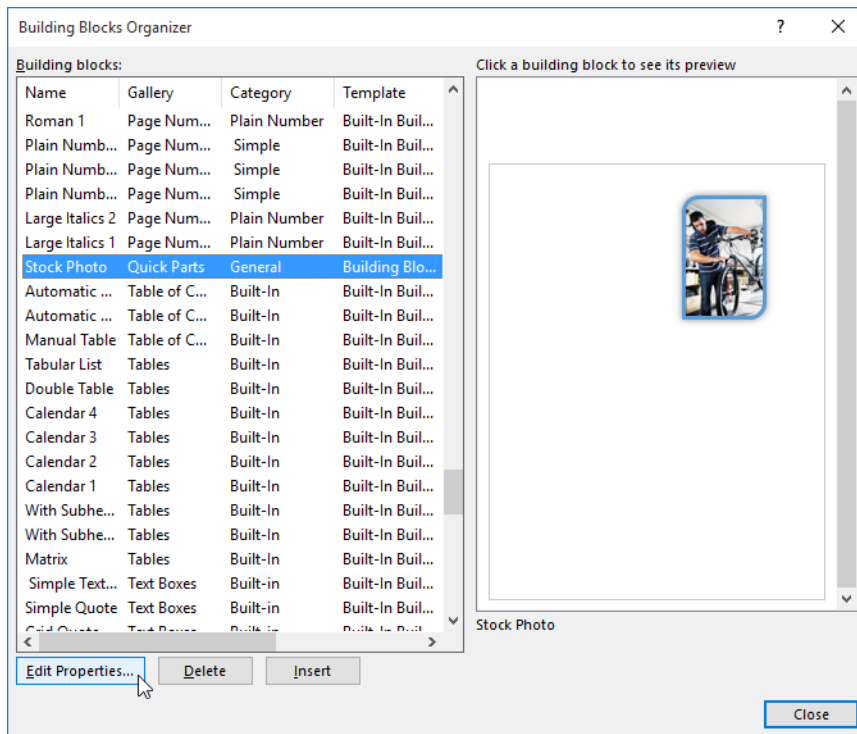
- The image will now be added to the page:



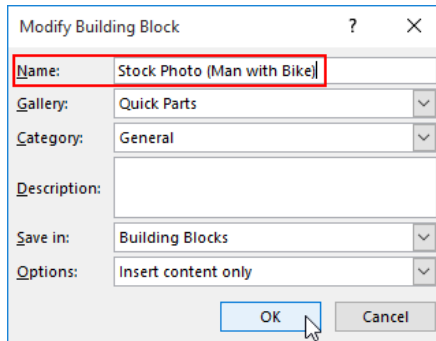
- Let's modify the description of this object so that it is more expressive. Click Insert → Quick Parts → Building Blocks Organizer:



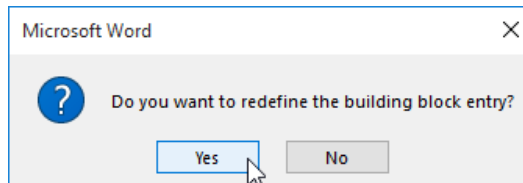
- Locate the Stock Photo item and click it to select it. Then, click Edit Properties:



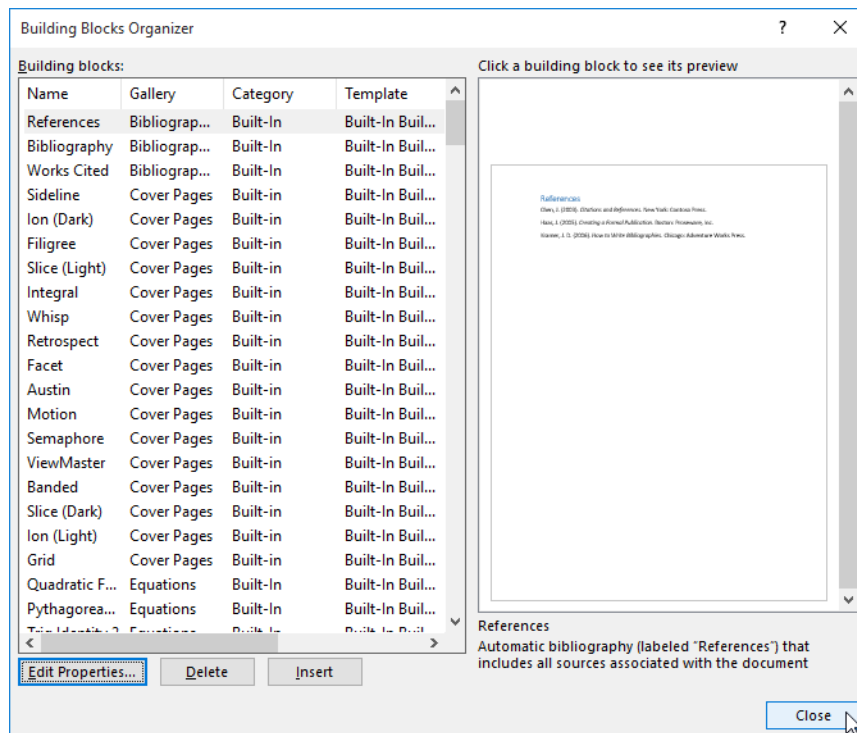
10. Add the text “(Man with Bike)” to the Name field and click OK:



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



12. Close the Building Blocks Organizer dialog:



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:

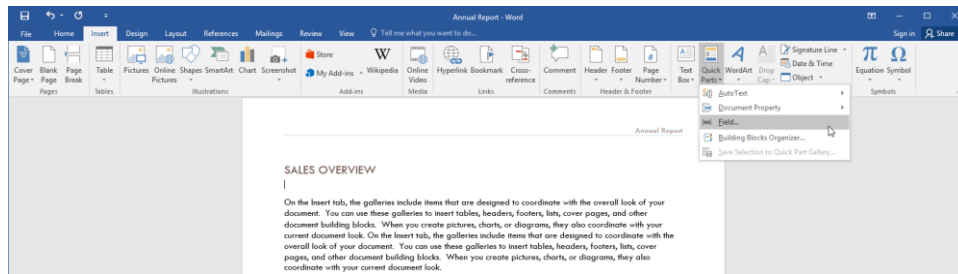
Prepared B¹{ AUTHOR * Upper²*
MERGEFORMAT³

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.)

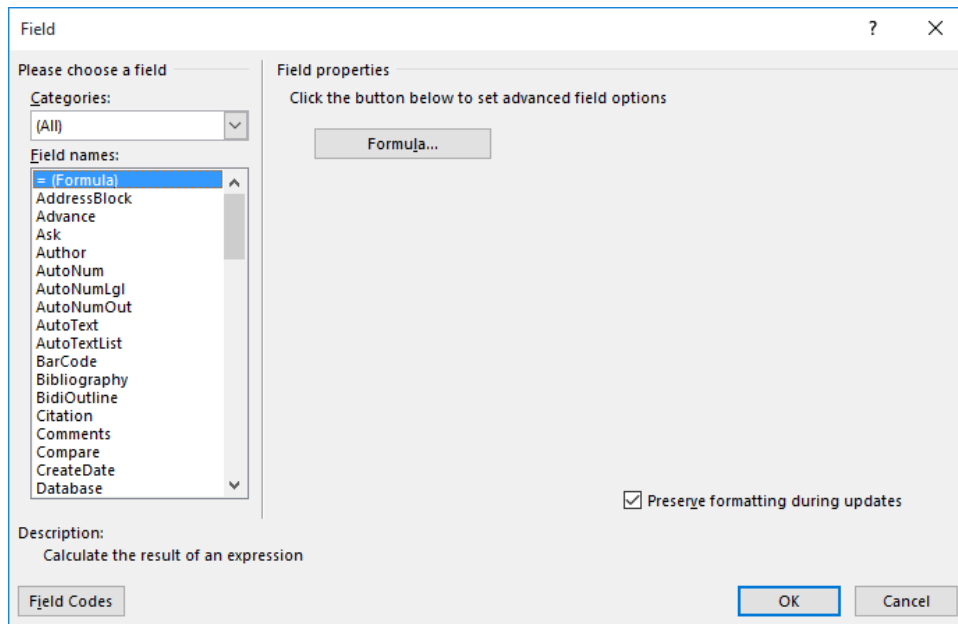
You can press Alt + F9 at any time to re-display the field result.

THE FIELD DIALOG BOX

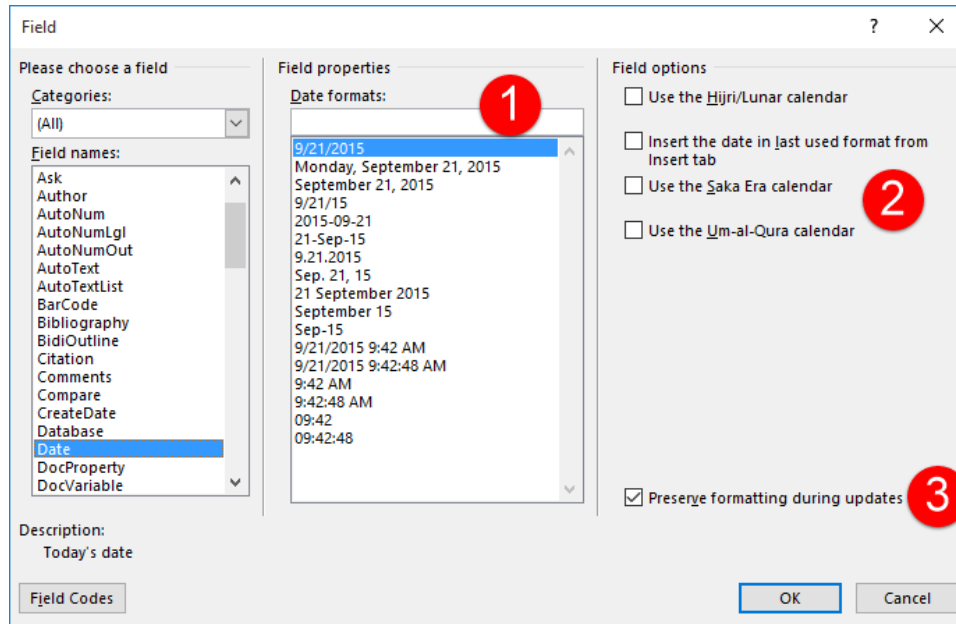
Although you can manually type fields, it is far easier to insert them with the Field dialog box. To start, place your cursor where you want the field information to go. Then, click Insert → Quick Parts → Field:



The Field dialog box will open:

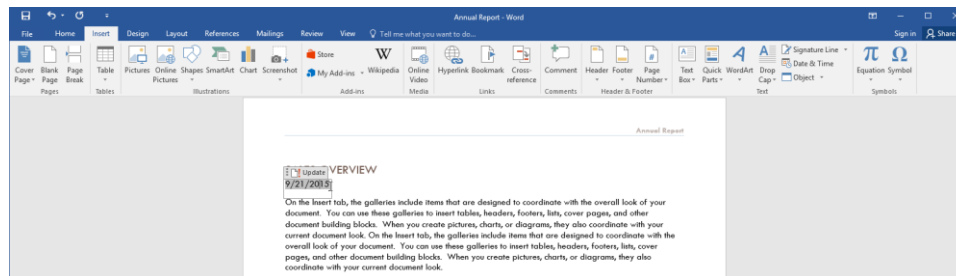


First, select the field name from the list on the left. Then, appropriate options will be shown in the pane on the right:



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.

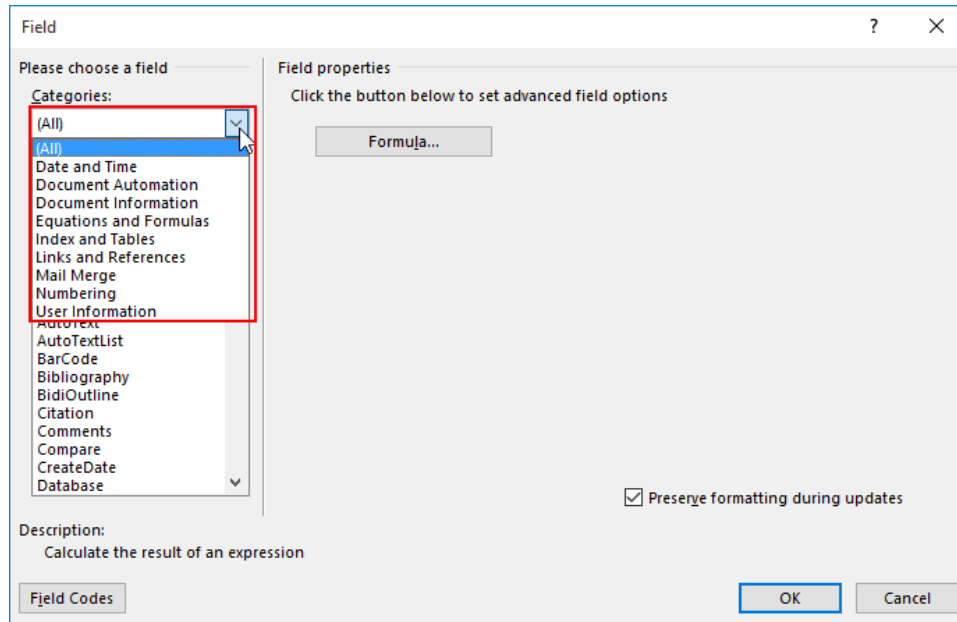
The field will now be inserted. If you click it, you will see a command to update it:



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:



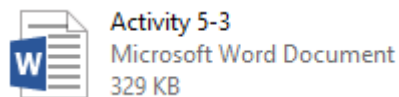
Selecting a category will show only the related fields in the Field dialog box.

ACTIVITY 5-3

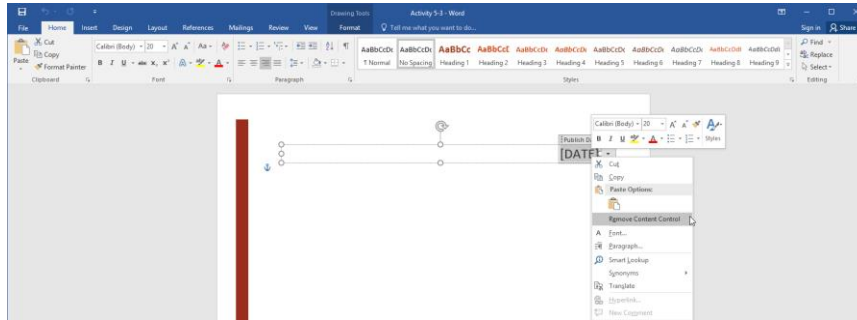
Inserting Fields Using Quick Parts

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

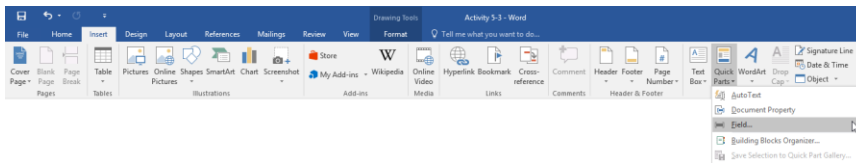
1. Open Microsoft Word 2016 and open Activity 5-3:



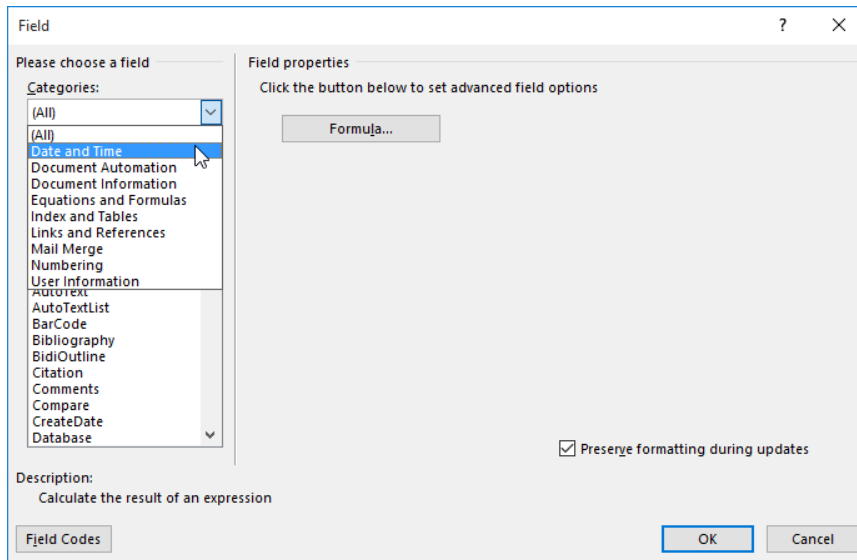
2. Right-click the Date text on the first page. Click Remove Content Control:



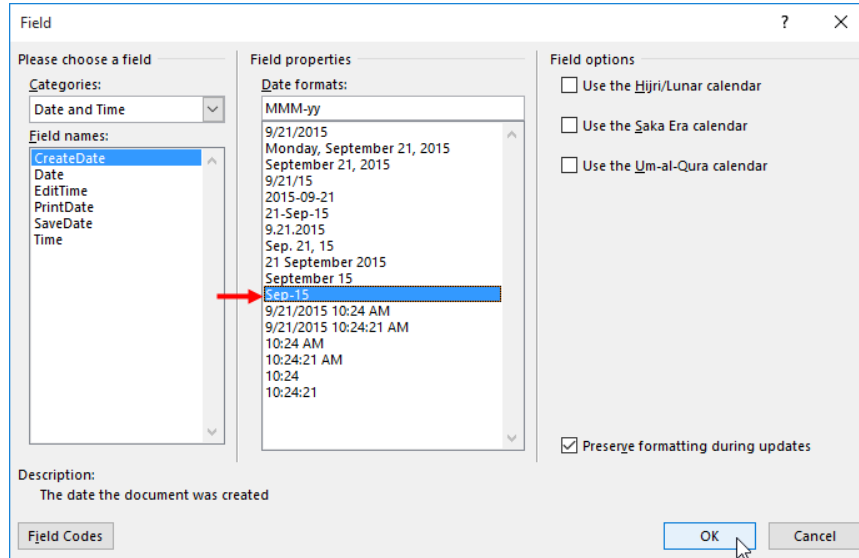
3. Your cursor should still be at the top of the document. Click Insert → Quick Parts → Field:



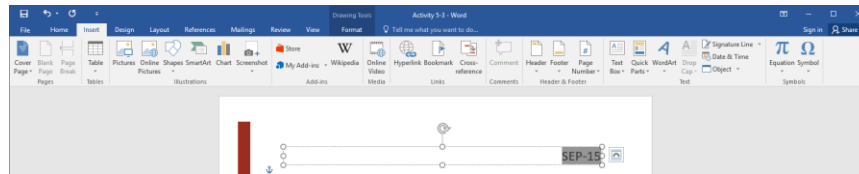
4. Click the Categories menu and click “Date and Time:”



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



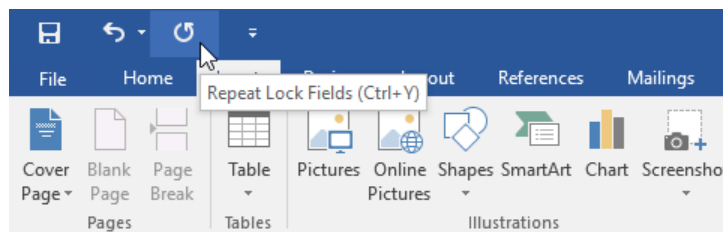
6. The field will now be inserted. Ensure that it is selected and press Alt + F9 to view the field code:



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.

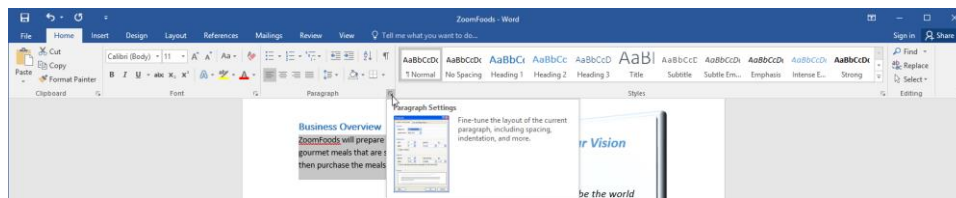
Topic Objectives

In this topic, you will learn:

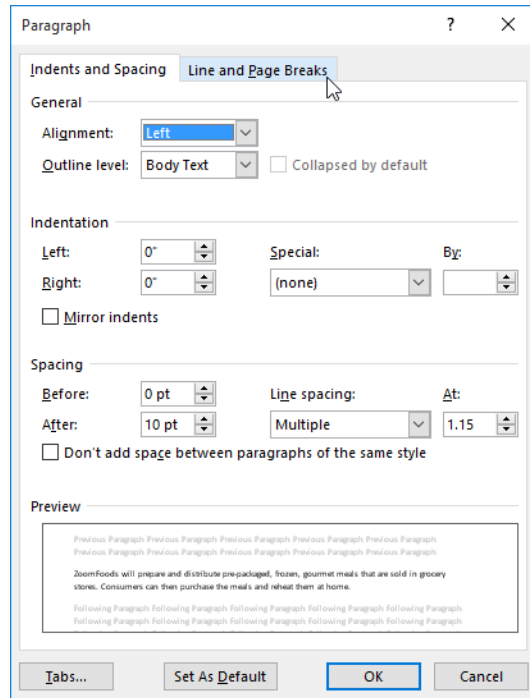
- About the paragraph flow options in the Paragraph dialog

PARAGRAPH FLOW OPTIONS

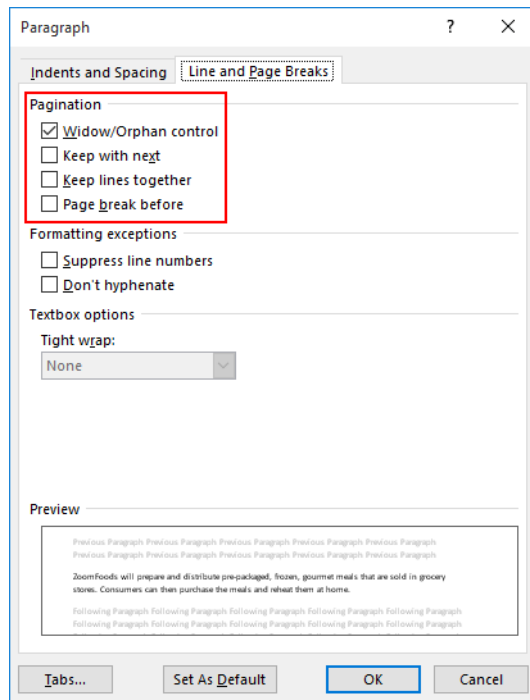
To customize paragraph flow options, first select the text that you want to modify. Then, click the option button in the Paragraph group of the Home tab:



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



You will see the following options:



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.

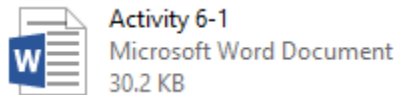
Once you have set your options, click OK to apply them.

ACTIVITY 6-1

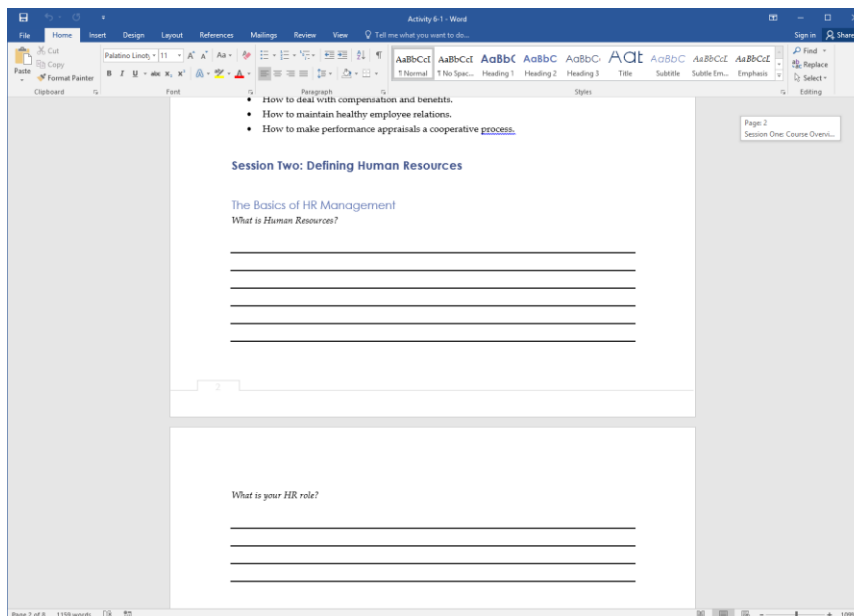
Controlling Paragraph Flow

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

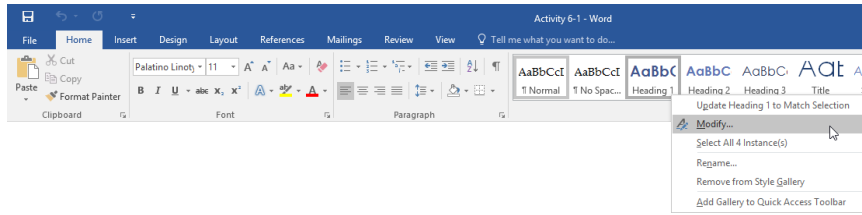
1. Open Microsoft Word 2016 and open Activity 6-1:



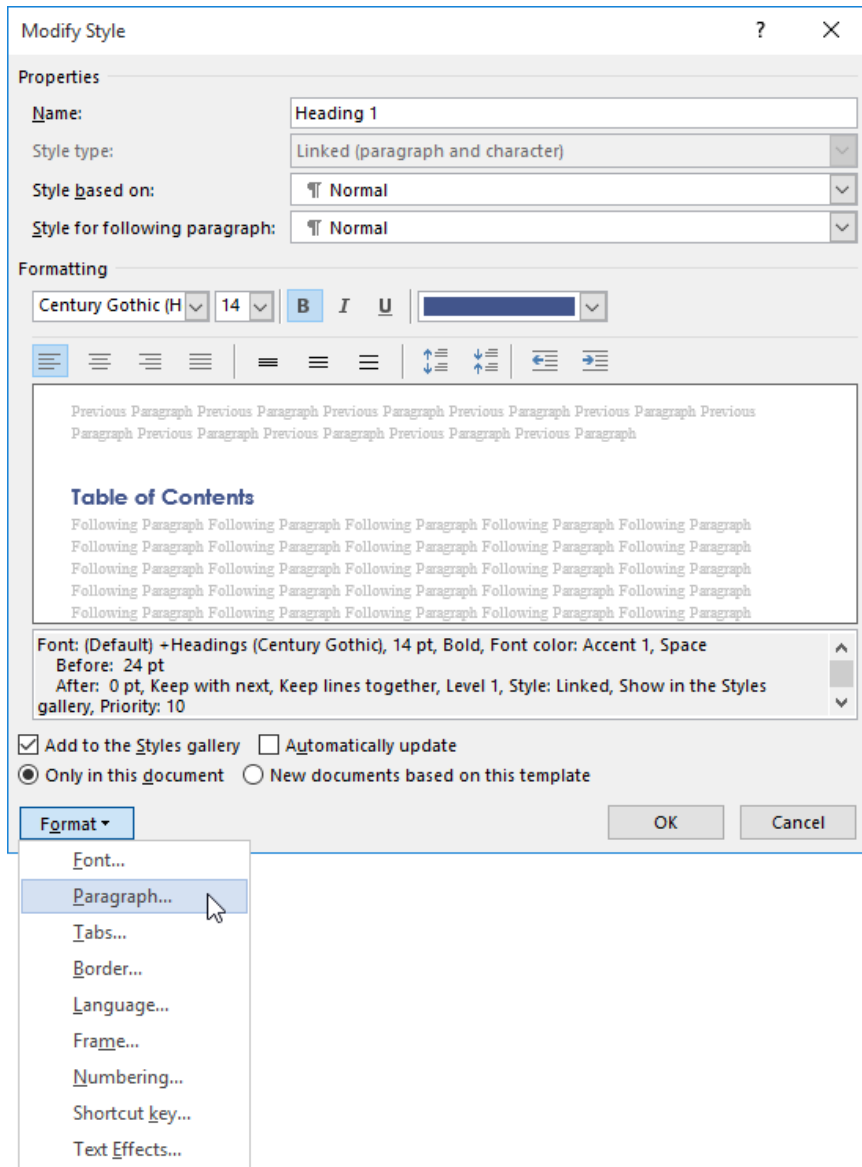
2. Scroll through the document. You can see that the pagination needs some help:



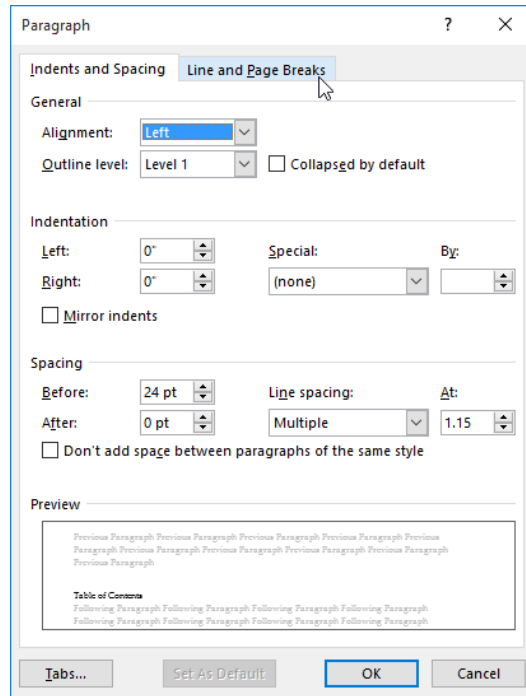
- 3. First, let's make sure that each session starts on its own page. Right-click the Heading 1 style in the Styles gallery and click Modify:



- 4. Click Format → Paragraph:

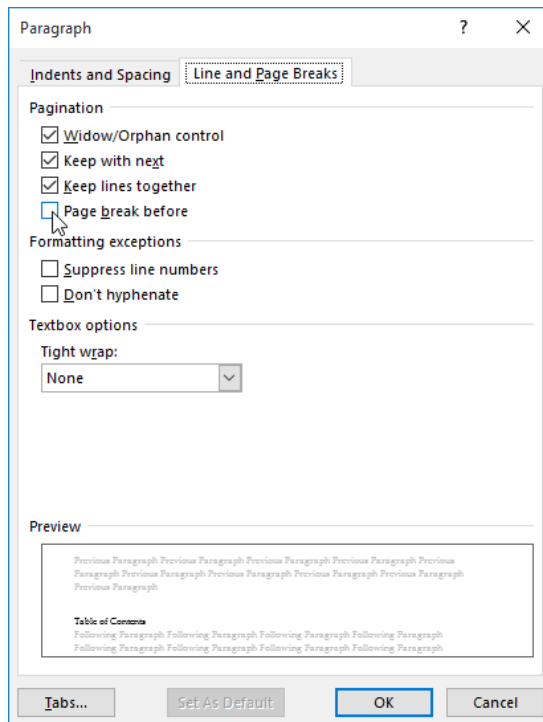


5. Click the “Line and Page Breaks tab” if it is not already selected:

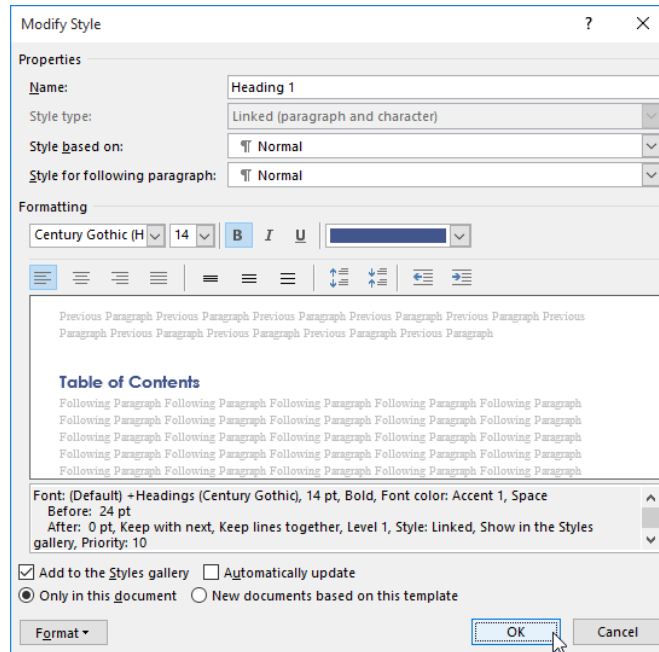


(If this tab is selected, skip to the next step.)

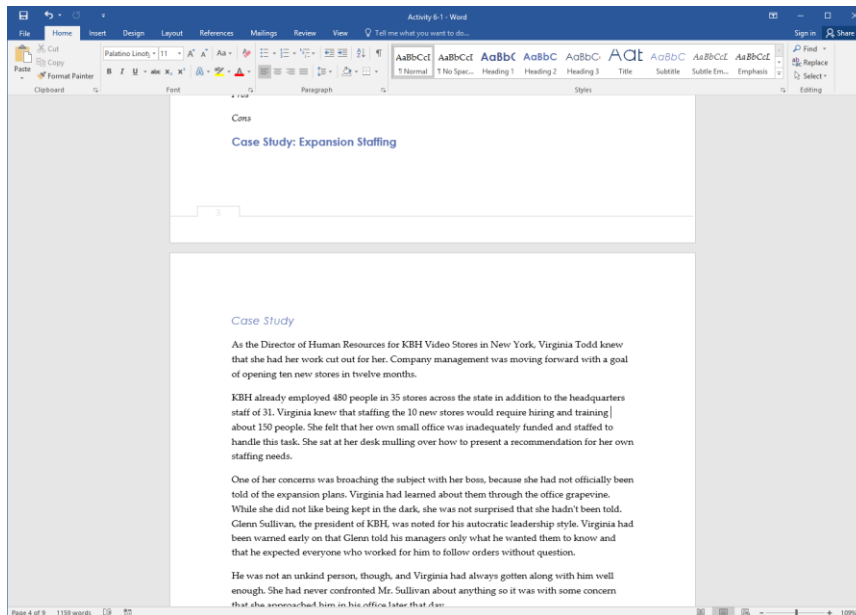
6. Check the “Page break before” box and click OK:



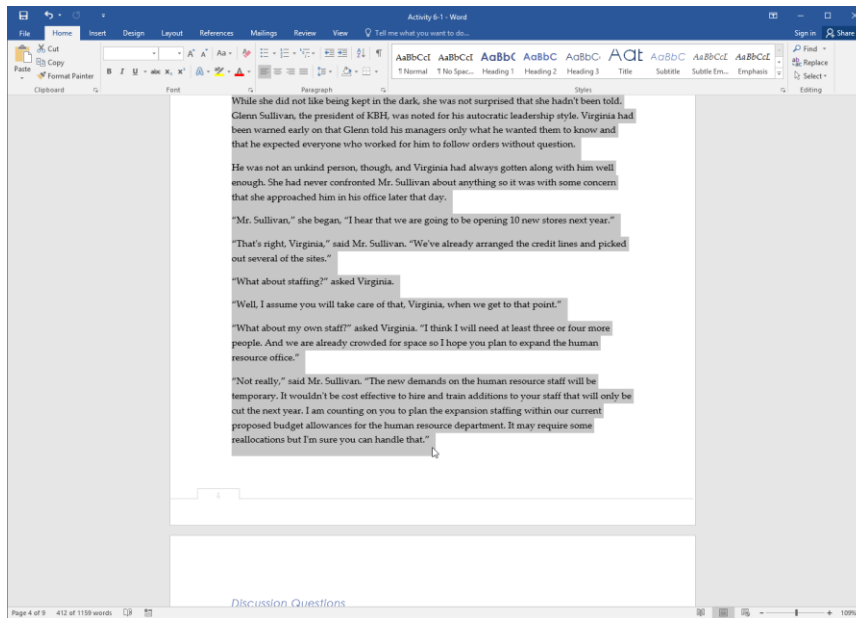
7. Click OK to save the style settings:



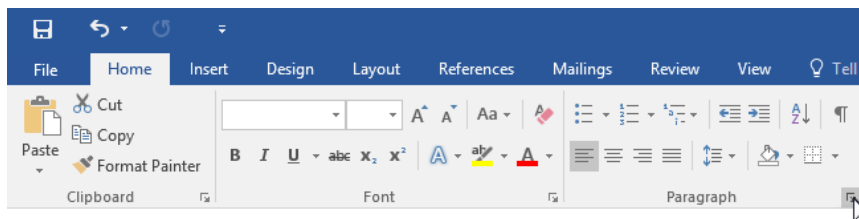
8. Now, let's see what our changes look like. Scroll through the first two pages and stop at page three:



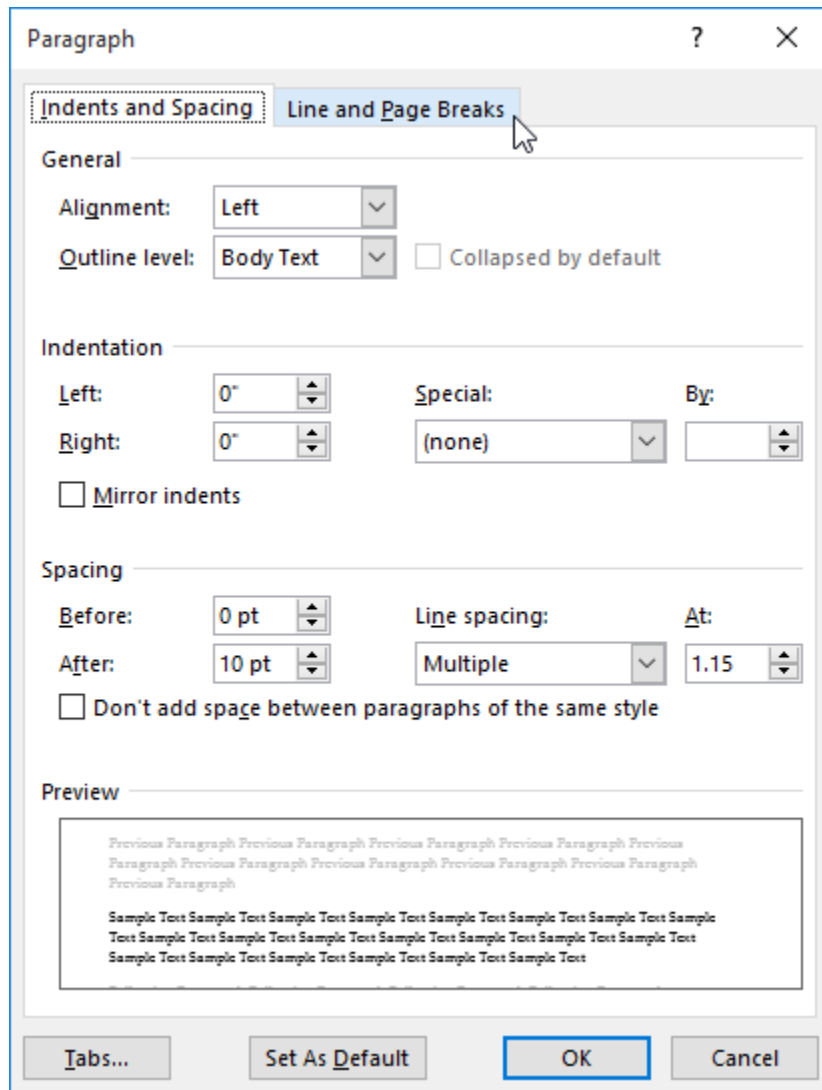
- You will see that the “Case Study: Expansion Staffing” title is abandoned on its own line. Select it as well as the contents of page four:



- Click the option button in the Paragraph group of the Home tab:



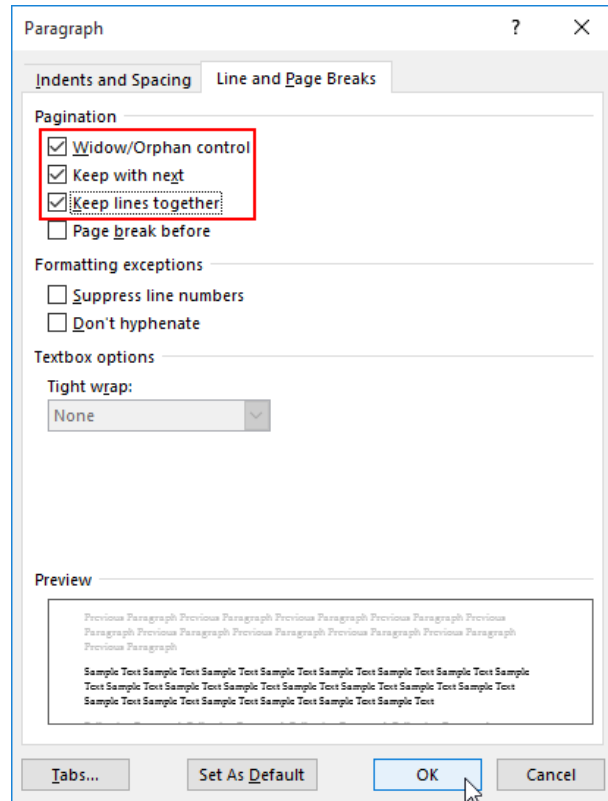
11. Click the “Line and Page Breaks tab” if it is not already selected:



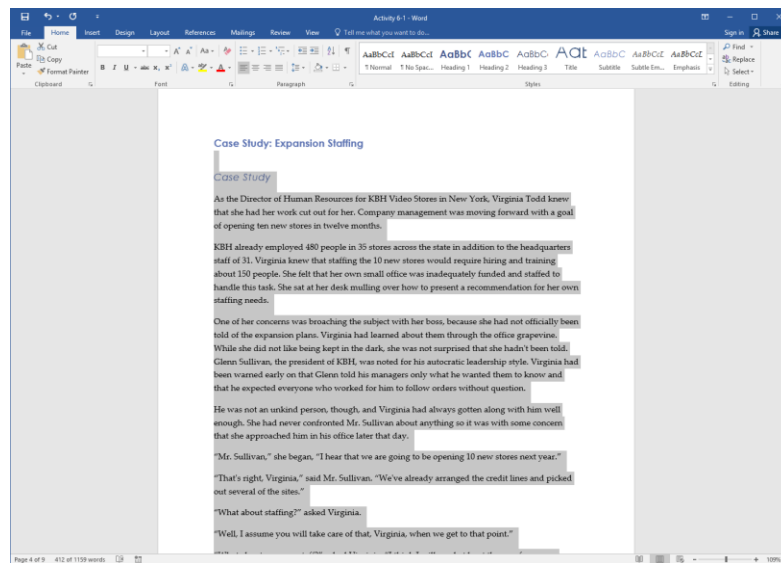
(If this tab is selected, skip to the next step.)

- 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.)

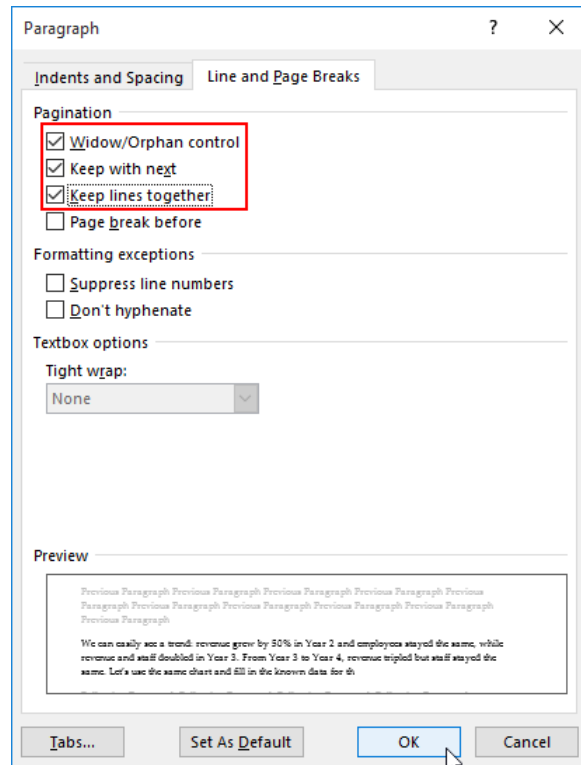


- You will see that the text is now kept together over two pages:

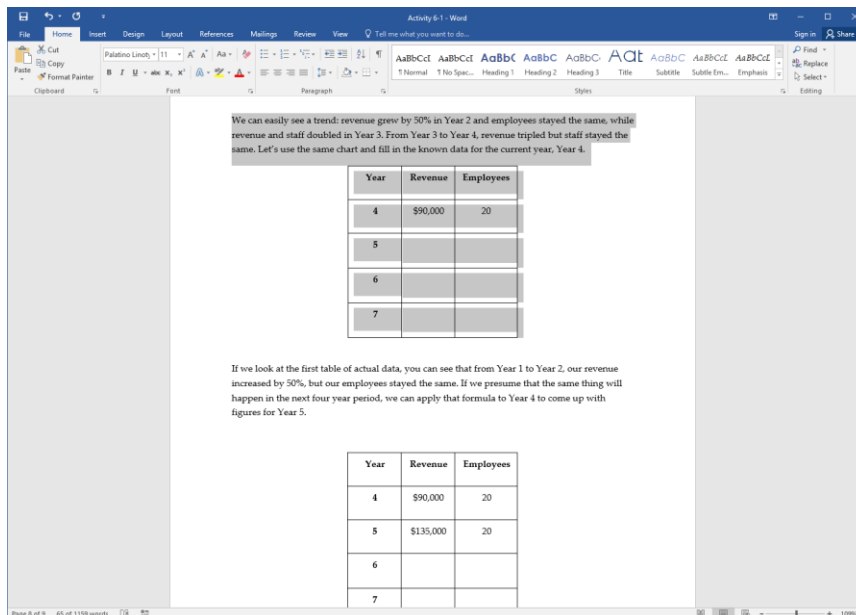


- Scroll to page seven. Let's see if we can use the same setting to fix the pagination of this paragraph and table. Select the affected items that span two pages and click the option button in the Paragraph group of the Home tab:

- 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:



- The problem is now fixed:



- 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

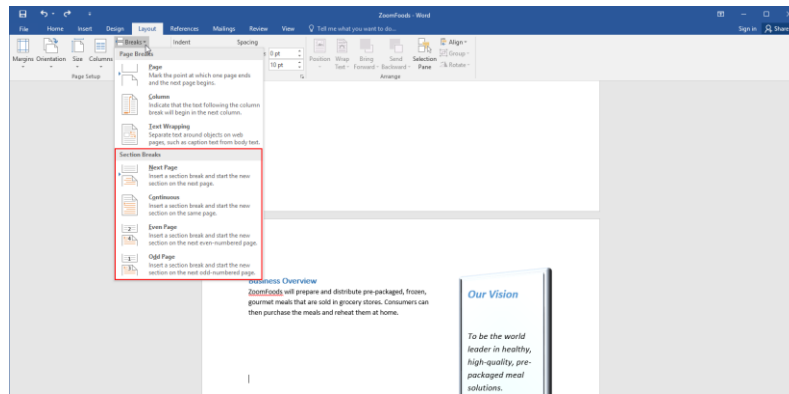
If you often create long, complicated documents, you'll probably find that **section breaks** will come in handy. Section breaks let you divide your document into independent sections, allowing you to apply different headers, footers, and formatting per section.

WHEN TO USE SECTION BREAKS

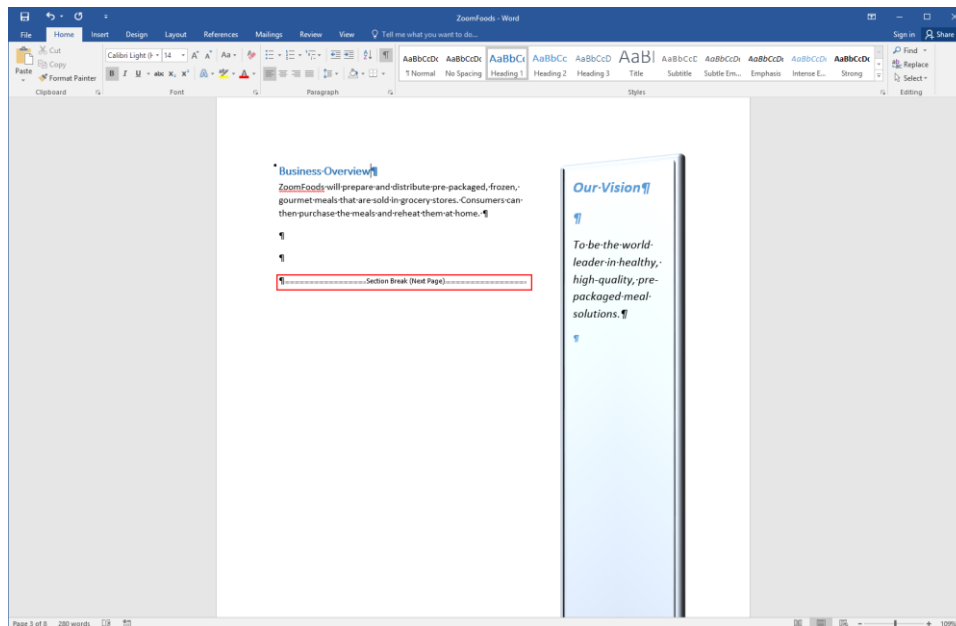
There are many useful applications for section breaks. One usage is to orient one or more pages in a different way than the rest of the document. For example, a workbook might have a few pages oriented in landscape to accommodate wide charts that wouldn't fit on a page with portrait orientation. You 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 → 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:



TYPES OF SECTION BREAKS

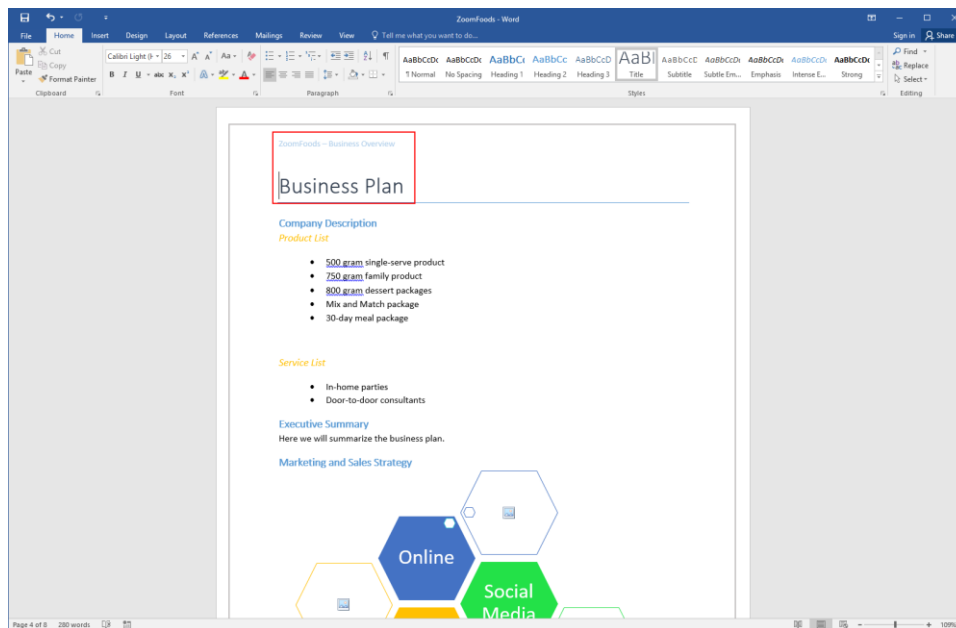
There are four types of section breaks available in Microsoft Word.

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.

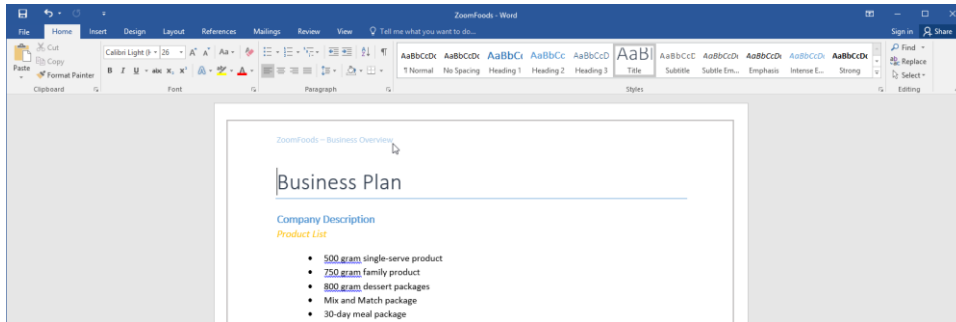
CREATING SECTION TITLES

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.

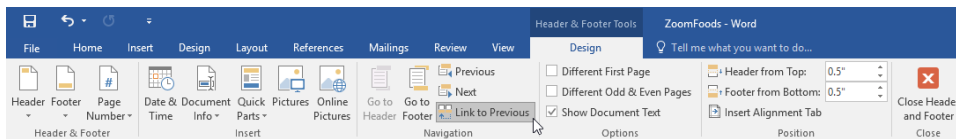
In this example, a new section has begun in the document, but it is still using the title from the previous section:



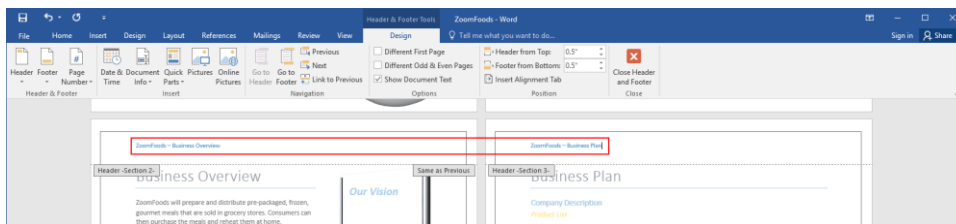
To resolve this, we will double-click in the header area to open the Header and Footer Tools – Design tab:



Then, on the Header and Footer Tools – Design tab, we will click the “Link to Previous” command to toggle it off:



Now, we can edit each header section independently:



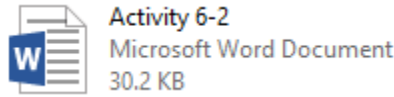
Notice that the header tags identify whether each header or footer is the same as the previous, or if it is a new title. You can repeat the “Link to Previous” command for each section title that you want to modify. Or, to re-link the headers or footers, click the command again.

ACTIVITY 6-2

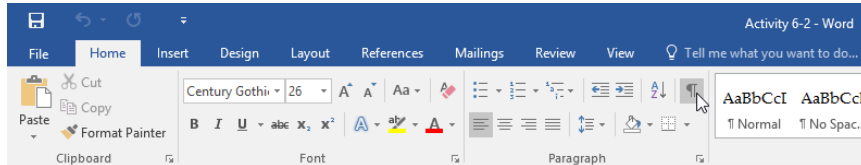
Inserting Section Breaks

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 → 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¶

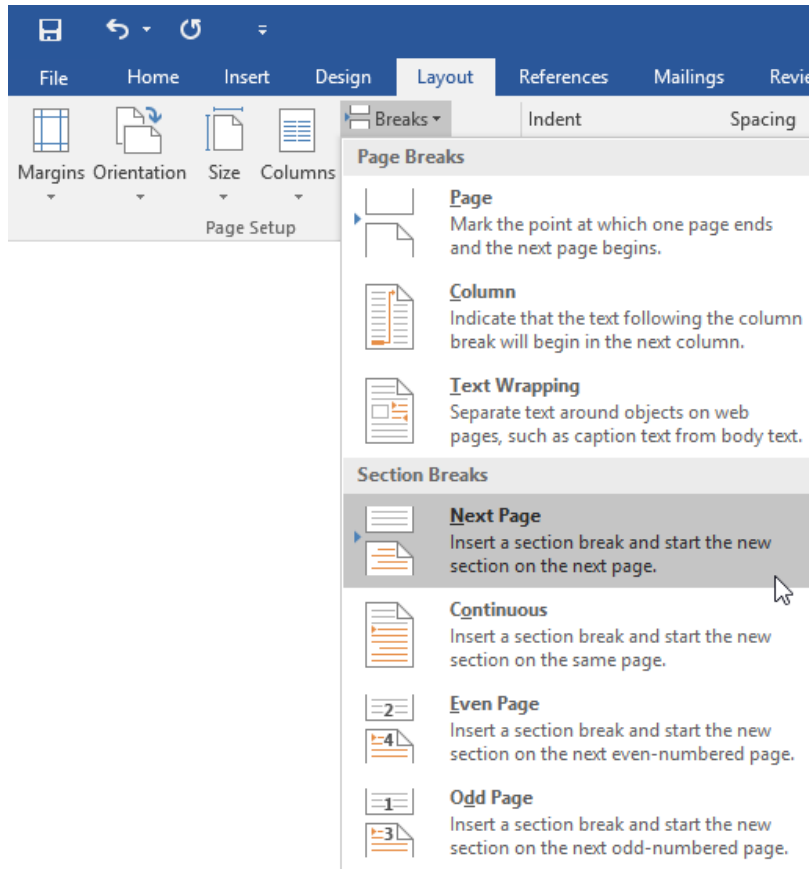
Session Three: Skills Inventory 5¶

Session Four: Forecasting 6¶

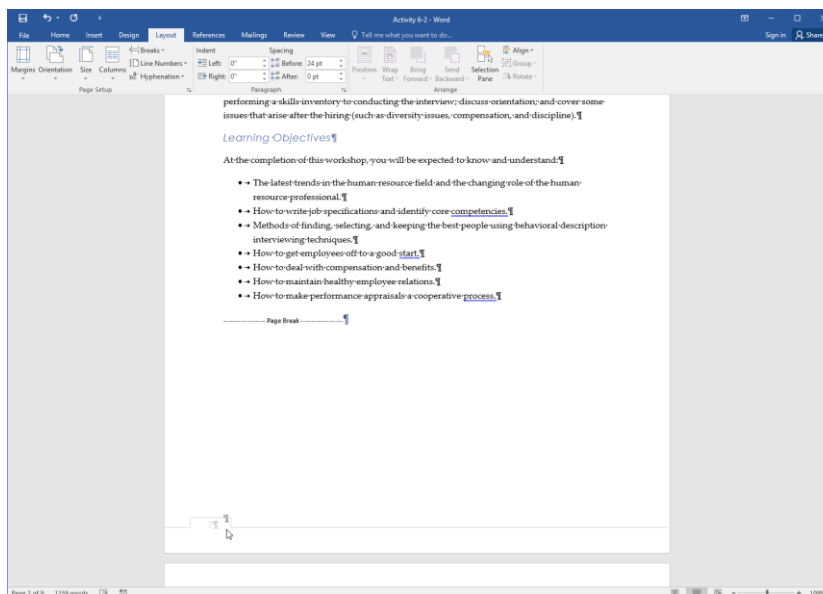
¶

..... Page Break ¶

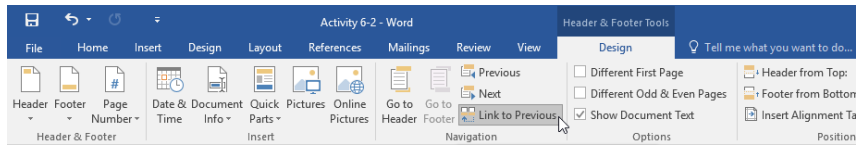
4. Without moving your cursor, click Layout → Breaks → Next Page:



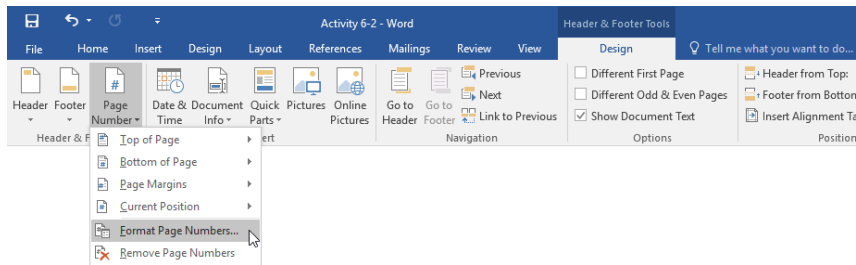
5. The section break will now be inserted. Double-click in the footer area of the second page:



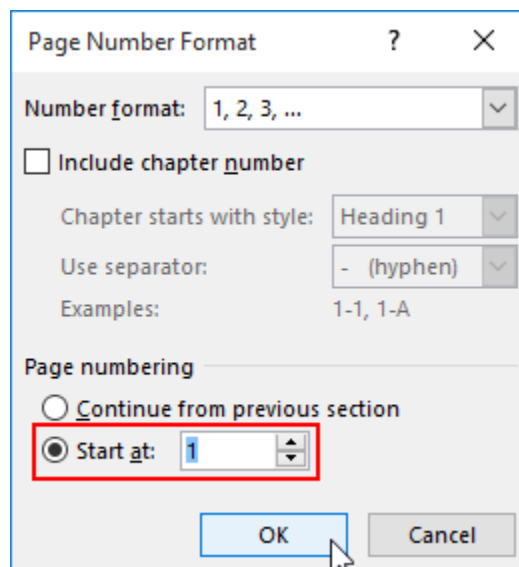
- The Header & Footer Tools – Design tab will become active. Deselect “Link to Previous:”



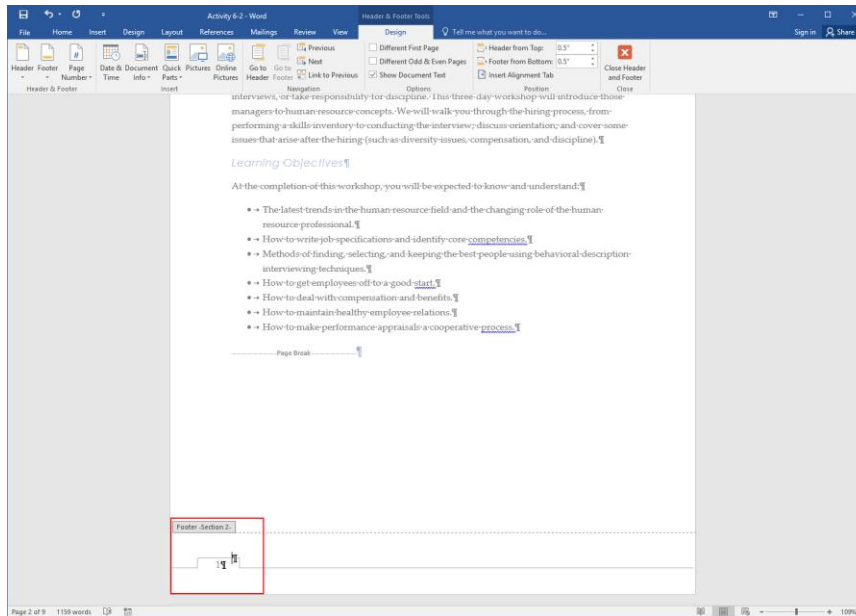
- This will break the link between sections. Now, click Header & Footer Tools – Design → Page Number → Format Page Numbers:



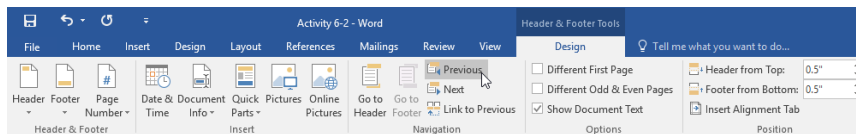
- The Page Number Format dialog box will open. Click the “Start at” radio button and ensure that “1” is displayed in the increment box beside it. This will tell Microsoft Word to re-start numbering at this section. Click OK:



9. Your changes will be applied to the footer:

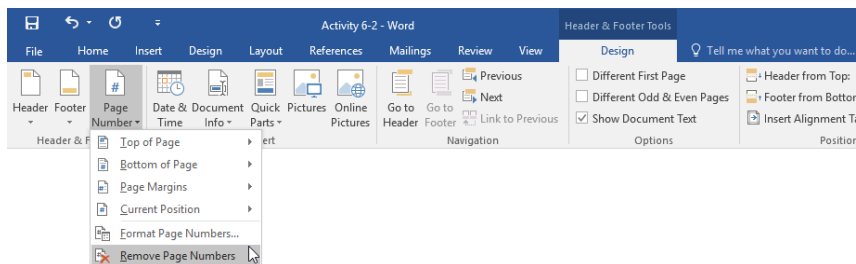


10. Click the Previous button on the Header and Footer Tools – Design tab.

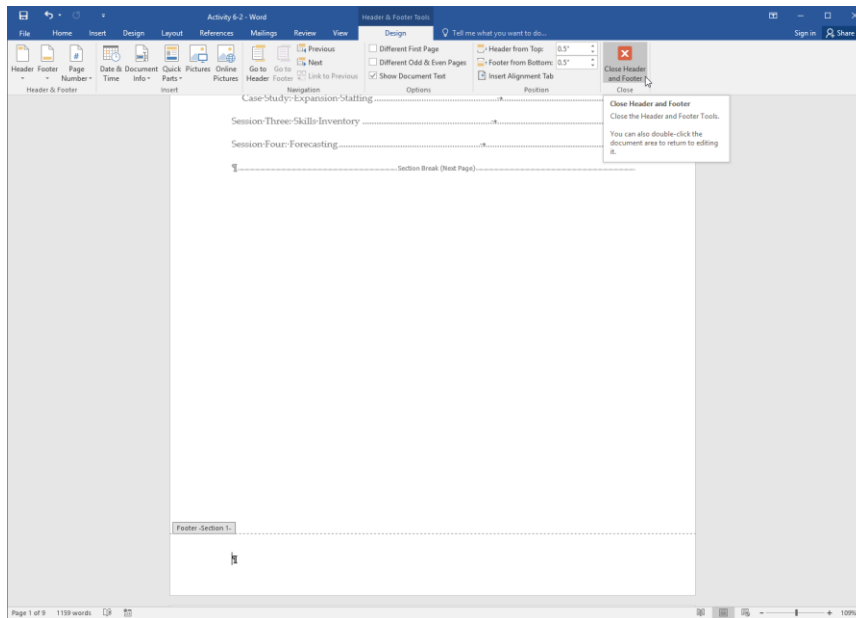


This will take you to the footer for the first page and place your cursor in that area.

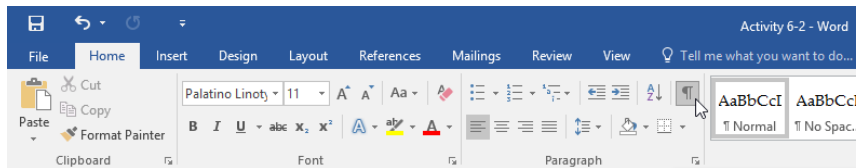
11. Click Header & Footer Tools – Design → Page Number → Remove Page Numbers:



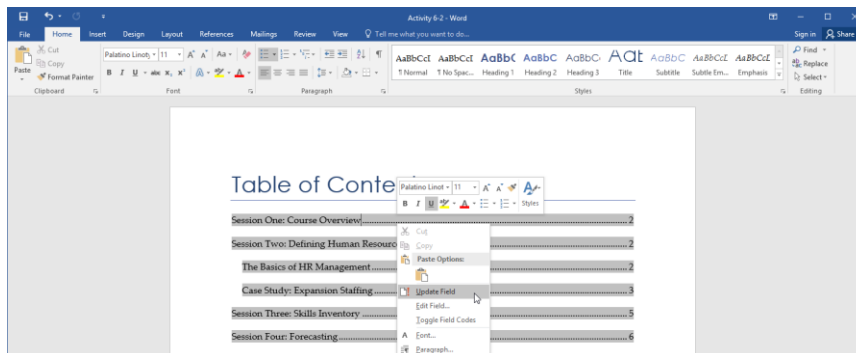
- The footer will be removed from the table of contents page only. Close header and footer view:



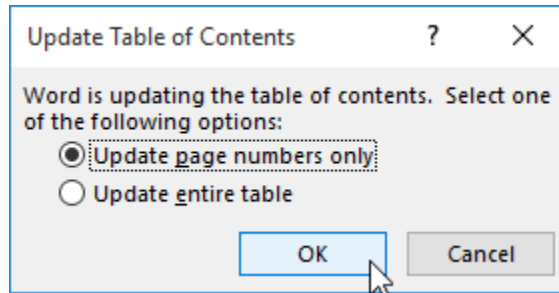
- Click Home → Show/Hide to hide formatting marks:



- Finally, scroll up to the top of page 1. Right-click the table of contents and click Update Field:



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.

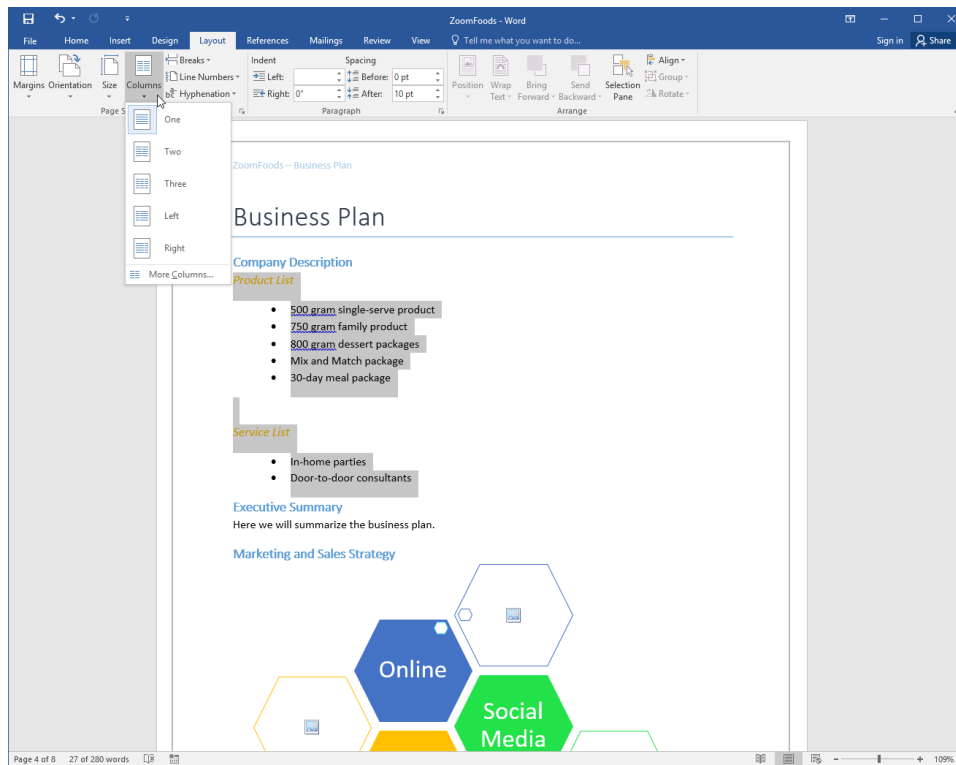
Topic Objectives

In this topic, you will learn:

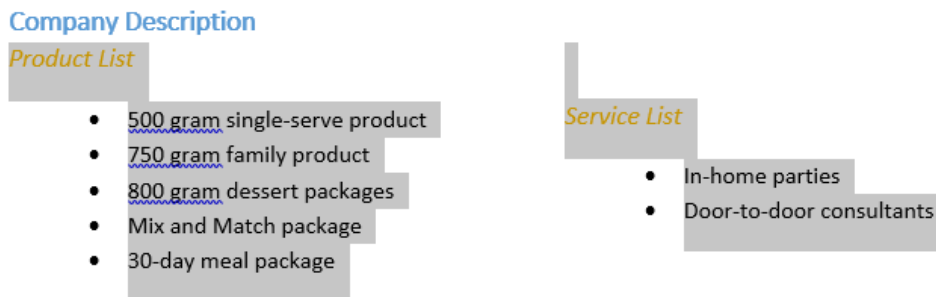
- How to format text as columns
- How to set column options

TEXT COLUMNS

To create columns, select the text that you want to format. Then, click Layout → Columns and choose how many columns you want to create:

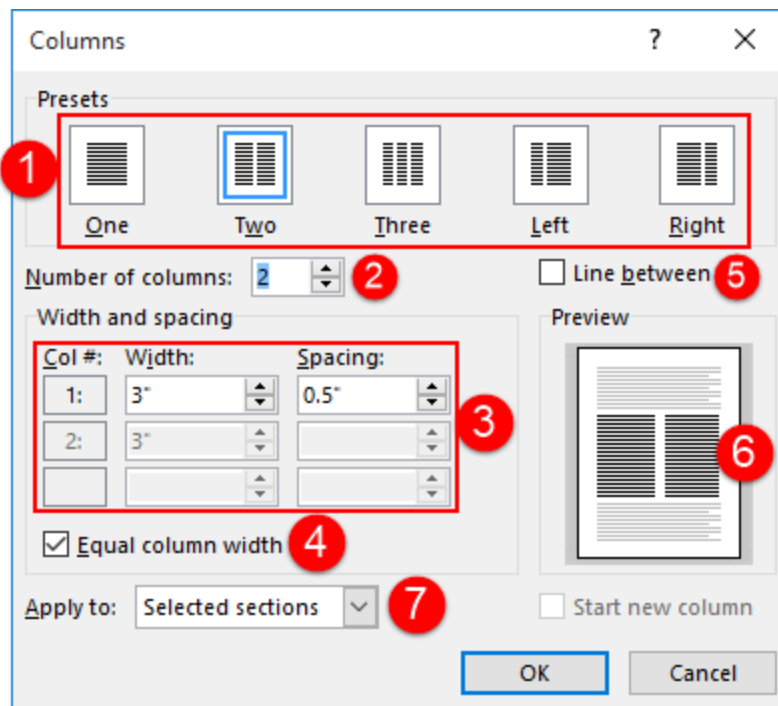


The selected text will then be formatted according to the number and/or style of columns you have chosen:



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:



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.

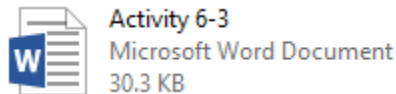
Once you have finished setting your options, click OK to apply them.

ACTIVITY 6-3

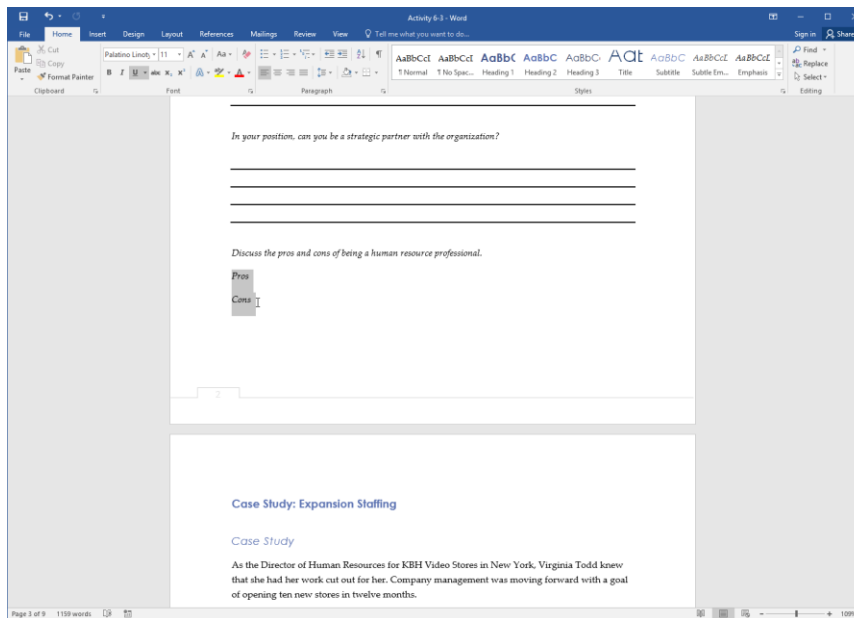
Inserting Columns

In this activity, you will format text as columns.

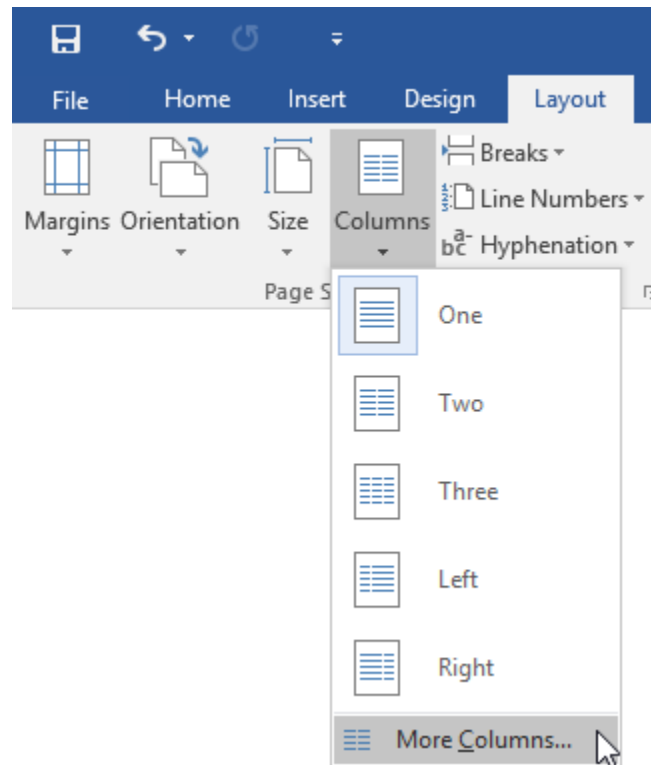
1. Open Microsoft Word 2016 and open Activity 6-3:



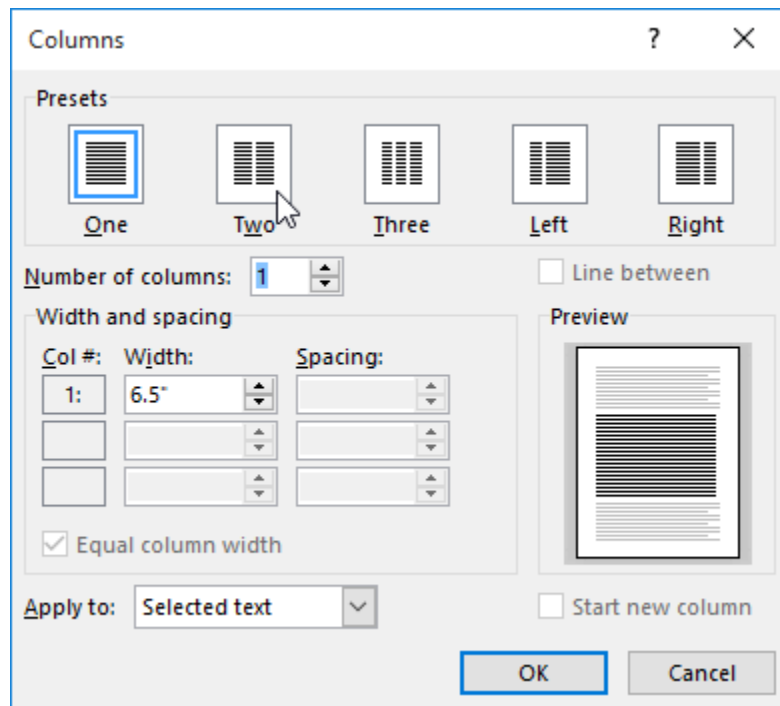
2. Scroll to the bottom of the third page. Select the text “Pros” and “Cons:”



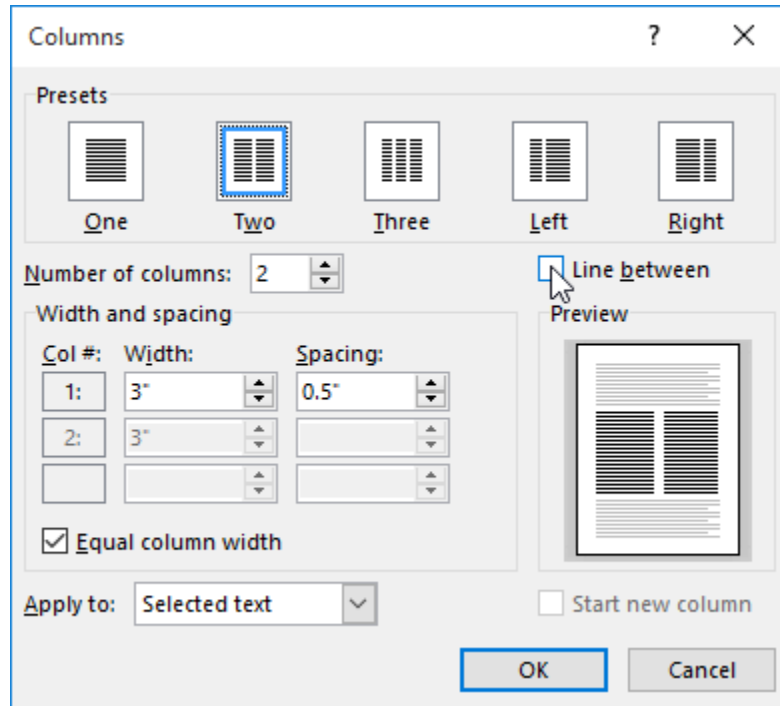
3. Now, click Layout → Columns → More Columns:



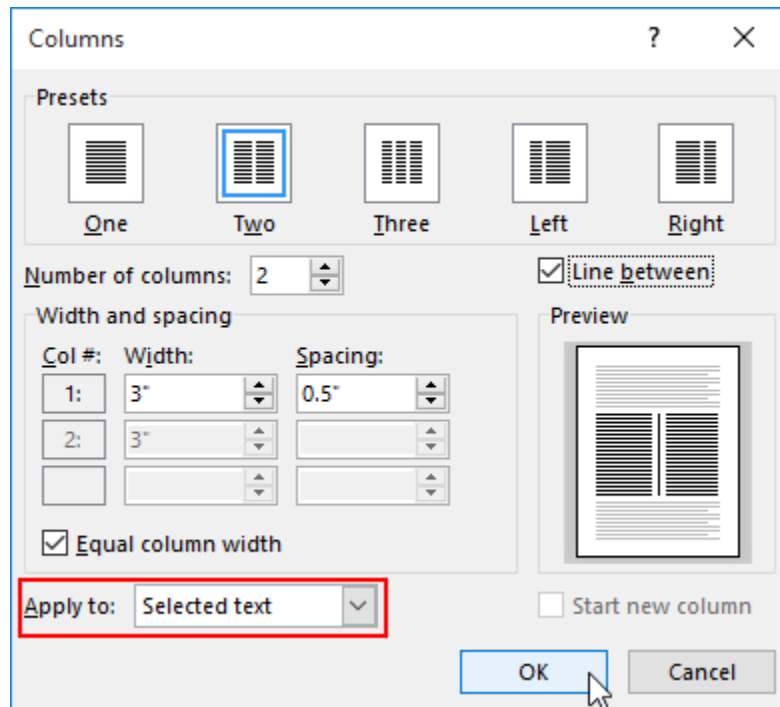
4. The Columns dialog will open. Select Two from the Presets section at the top:



5. Check the “Line between” box:



6. Ensure that the “Apply to” menu says “Selected text” and click OK:

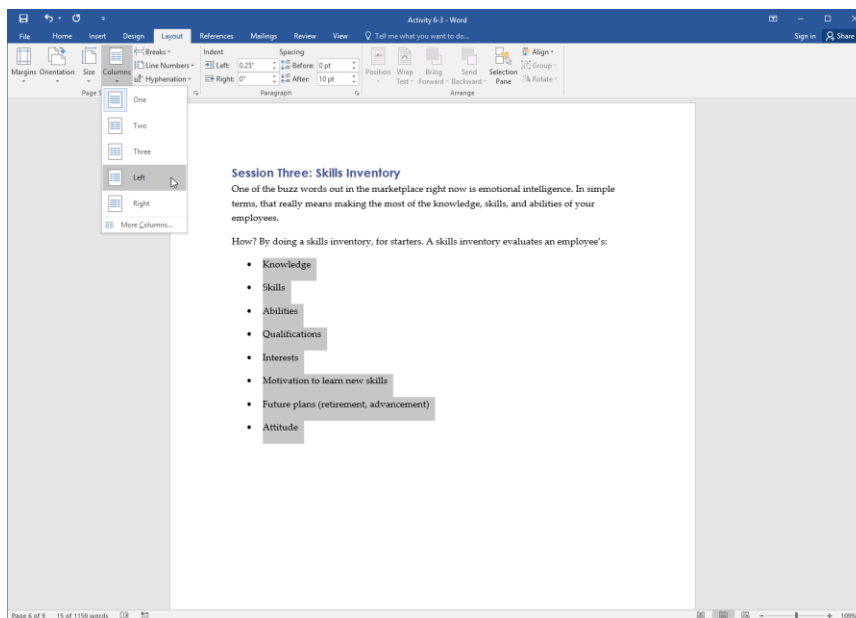


7. The text will now be formatted as columns. Click after the word “Pros” and press Shift + Enter three times to lengthen the line:

Discuss the pros and cons of being a human resource professional.

<i>Pros</i>		<i>Cons</i>
/		

8. Now, scroll to the sixth page of the document. Select the bulleted list and click Layout → Columns → Left:



9. The formatting will now be applied:

How? By doing a skills inventory, for starters. A skills inventory evaluates an employee's:

- Knowledge
- Skills
- Abilities
- Qualifications
- Interests
- Motivation to learn new skills
- Future plans (retirement, advancement)
- Attitude

10. Save your document as Activity 6-3 Complete. Close Microsoft Word 2016 to complete 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.

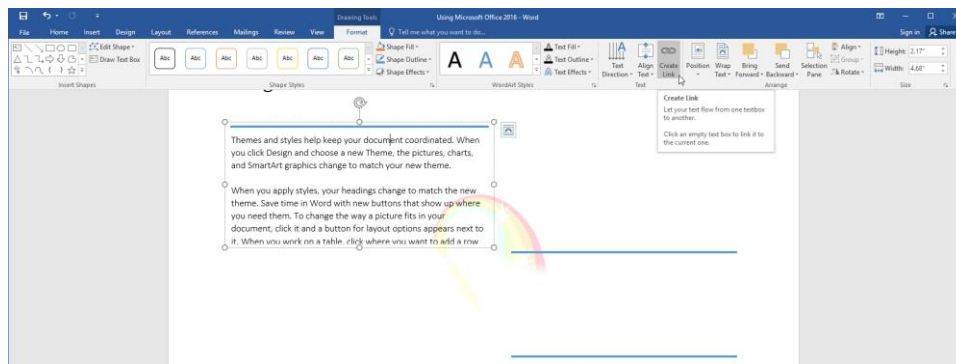
Topic Objectives

In this topic, you will learn:

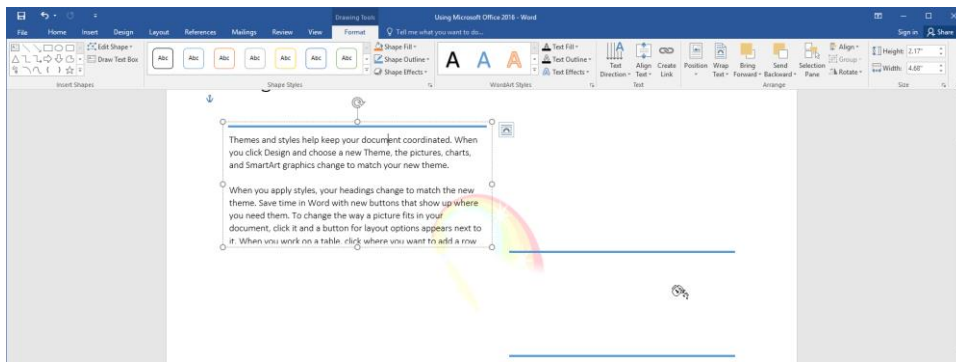
- How to link text boxes
- How to insert text from a file

LINKED TEXT BOXES

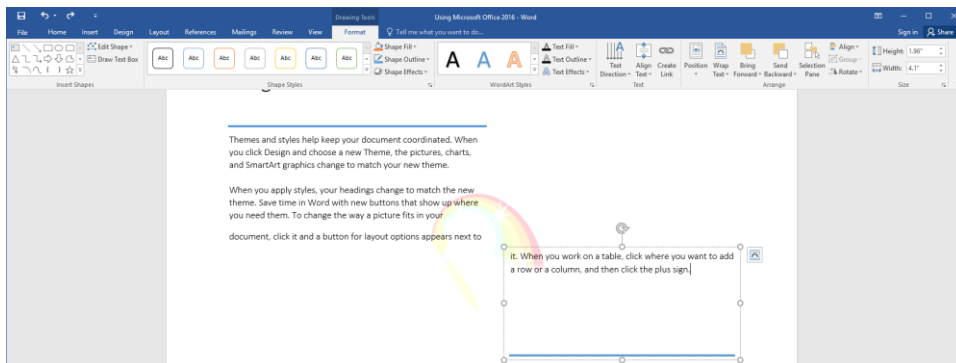
To link text boxes, click the first box. (Notice how in this example, there is currently too much text in the first text box to be displayed.) Then, click Drawing Tools – Format → Create Link:



Now, click a second, empty text box:

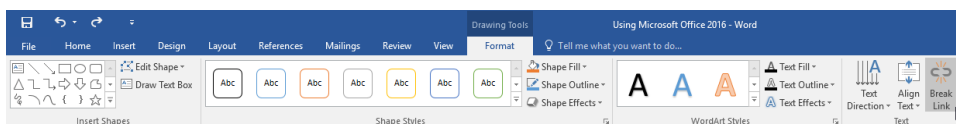


Now the boxes will be linked. Notice how the text flows from one box to the next:



(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:

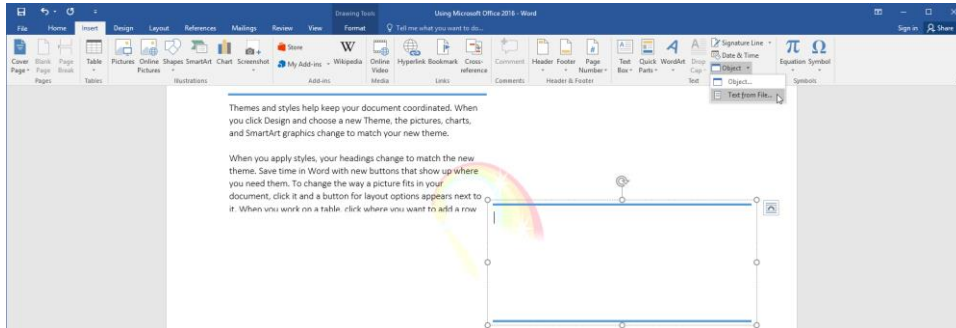


Following this action, all text will now be moved back to the original text box (or back one box in the chain, if multiple text boxes are linked).

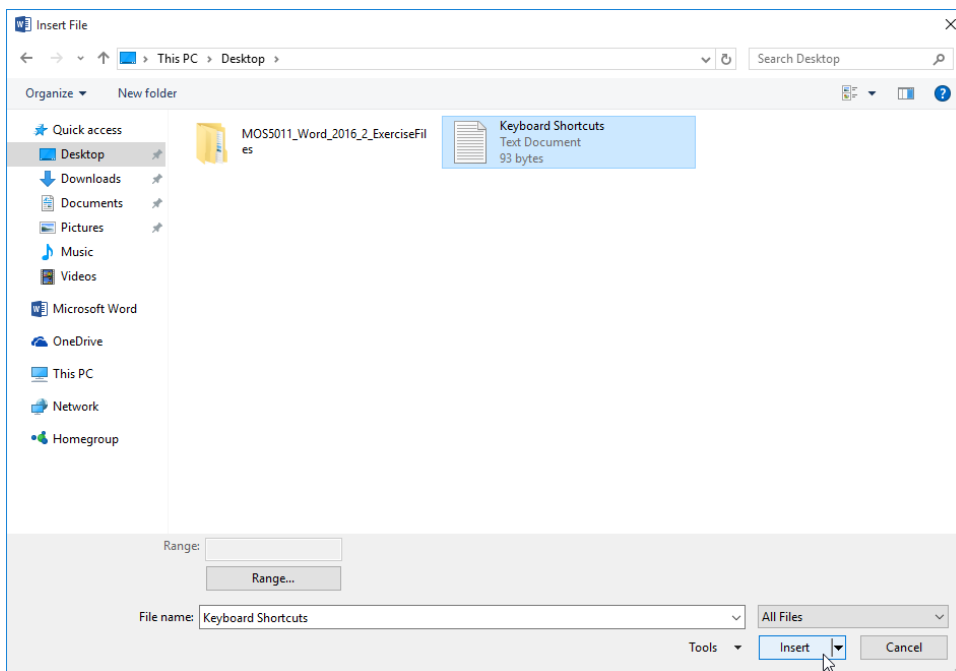
INSERTING TEXT FROM A FILE

Although you can copy and paste text between programs, you may occasionally find it easier to insert the text directly from the file.

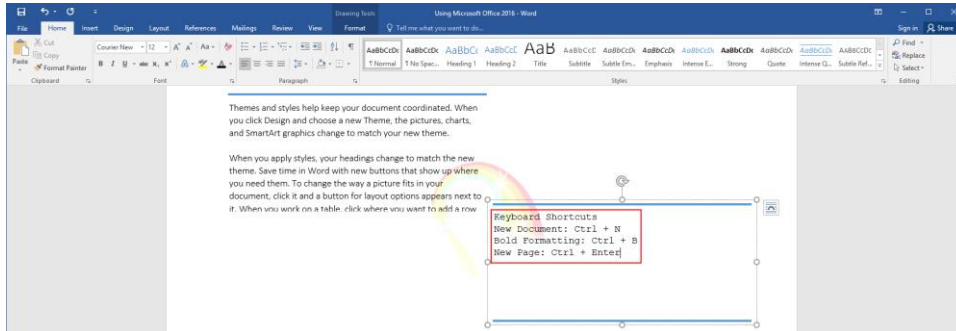
To do this, place your cursor at the location in your current Word document where you want the inserted text to go. (You can choose any place in the document, including a text box.) Then, click Insert → Object → Text from File:



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:



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:

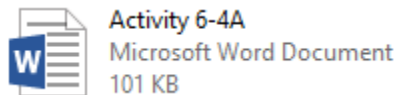


ACTIVITY 6-4

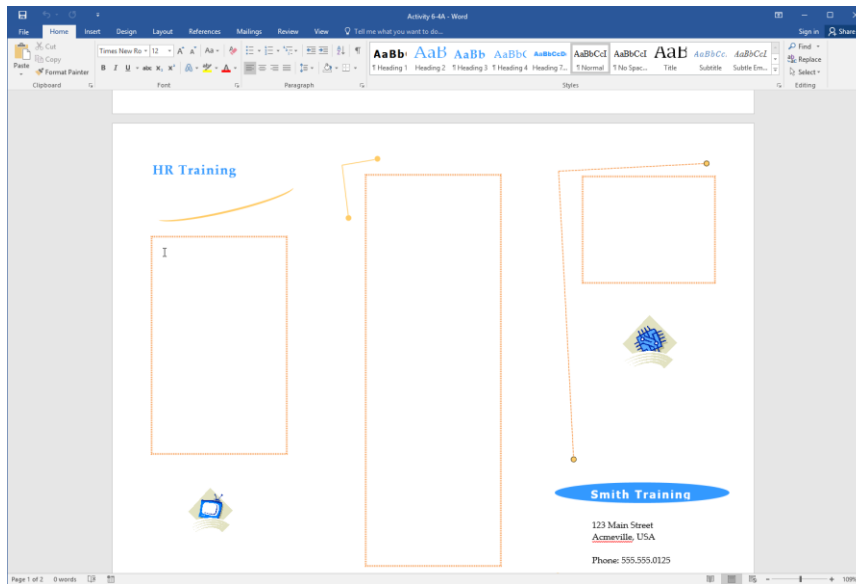
Linking Text Boxes

In this activity, you will use your training document to create a brochure.

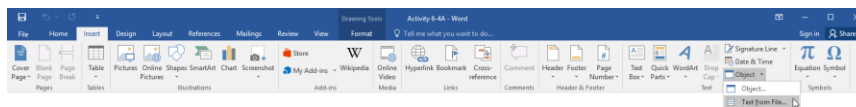
1. Open Microsoft Word 2016 and open Activity 6-4A:



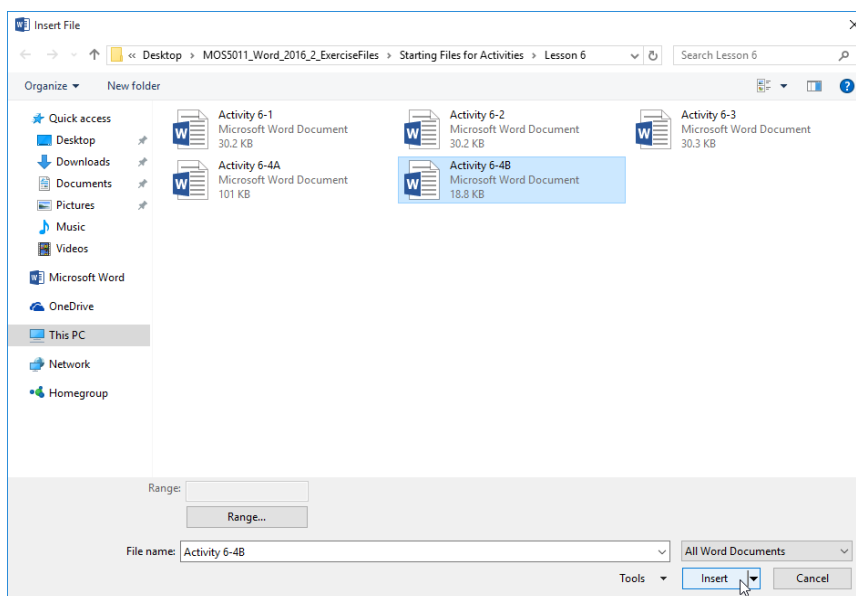
2. Ensure that you are viewing the second page of the document. Click to place your cursor in the text box on the left-hand side:



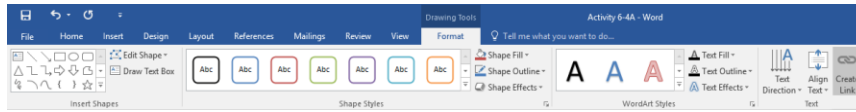
3. Now, let's insert our Course Overview and Course Objectives from the handout. We've already saved it as a separate file, so click Insert → Object → Text from File:



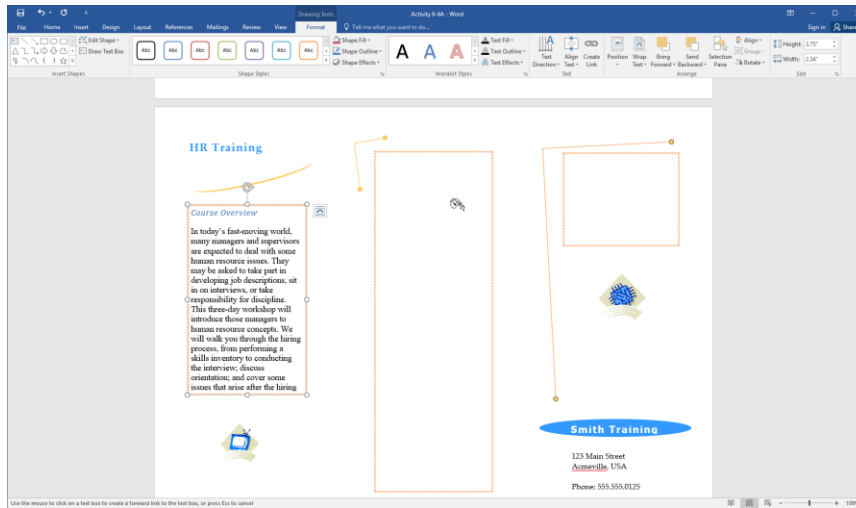
4. Use the Insert File dialog to browse to your Exercise Files folder. Locate the Activity 6-4B file. Select it and click Insert:



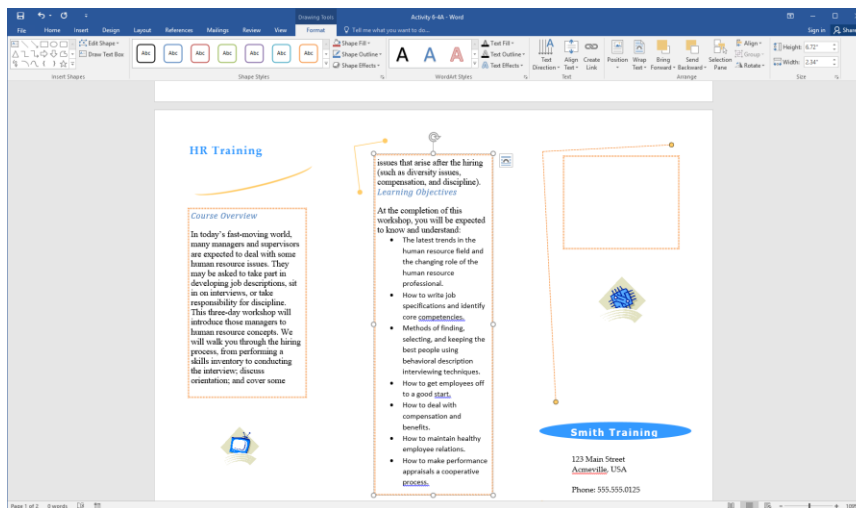
- The text will be inserted. However, you can see that there is too much text for this text box. To resolve this, let's link it to the second box. With the first text box still selected, click Drawing Tools – Format → Create Link:



- Your cursor will turn into a pouring icon. Click the second text box:

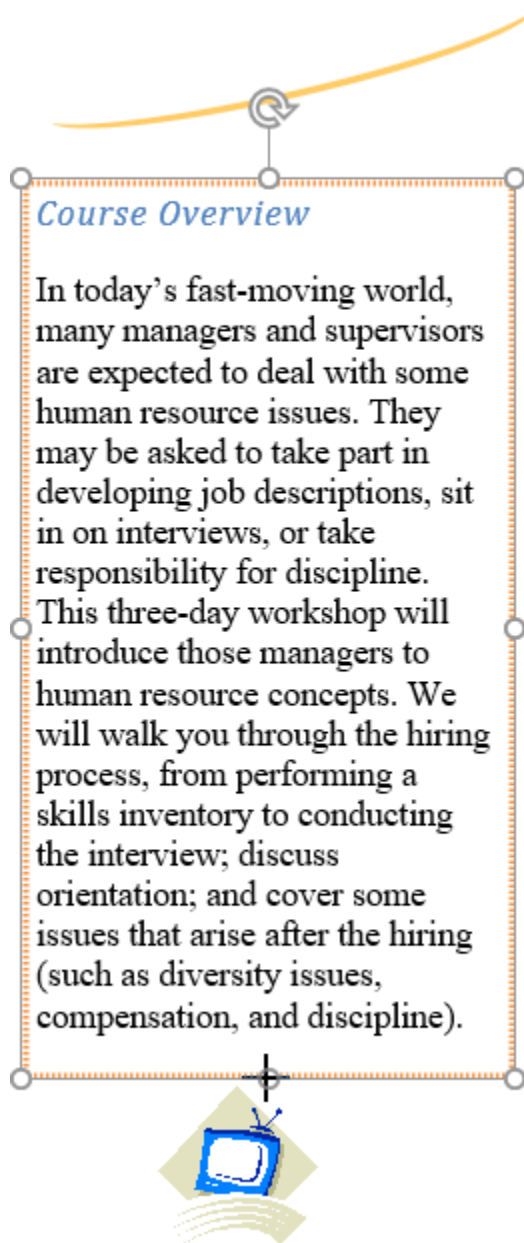


- The overflow text will be inserted:




- 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

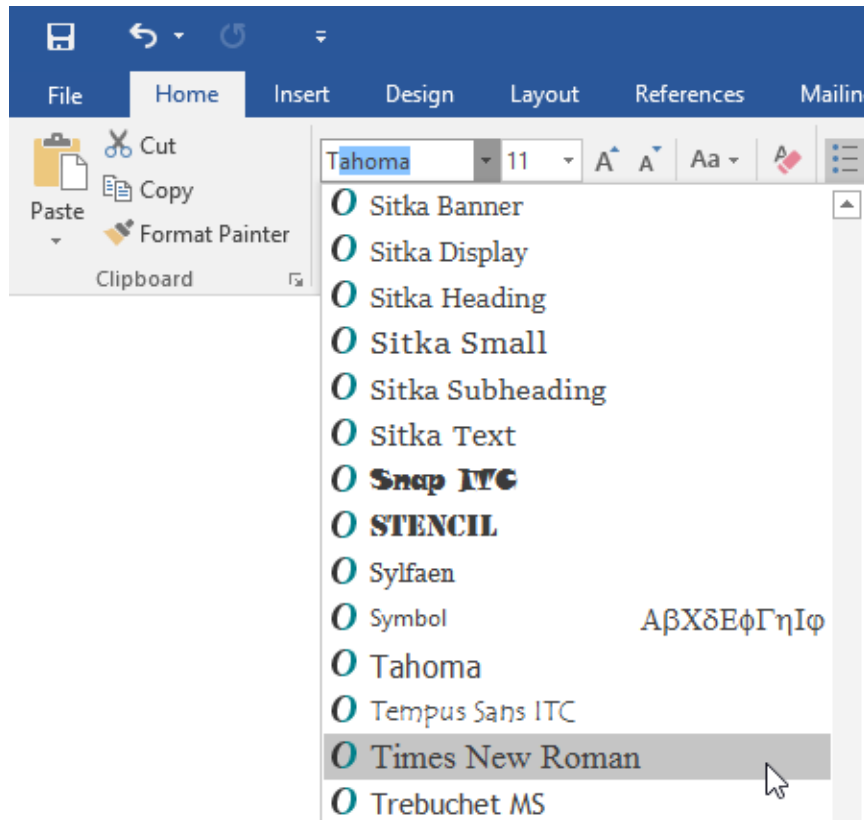


Course Overview

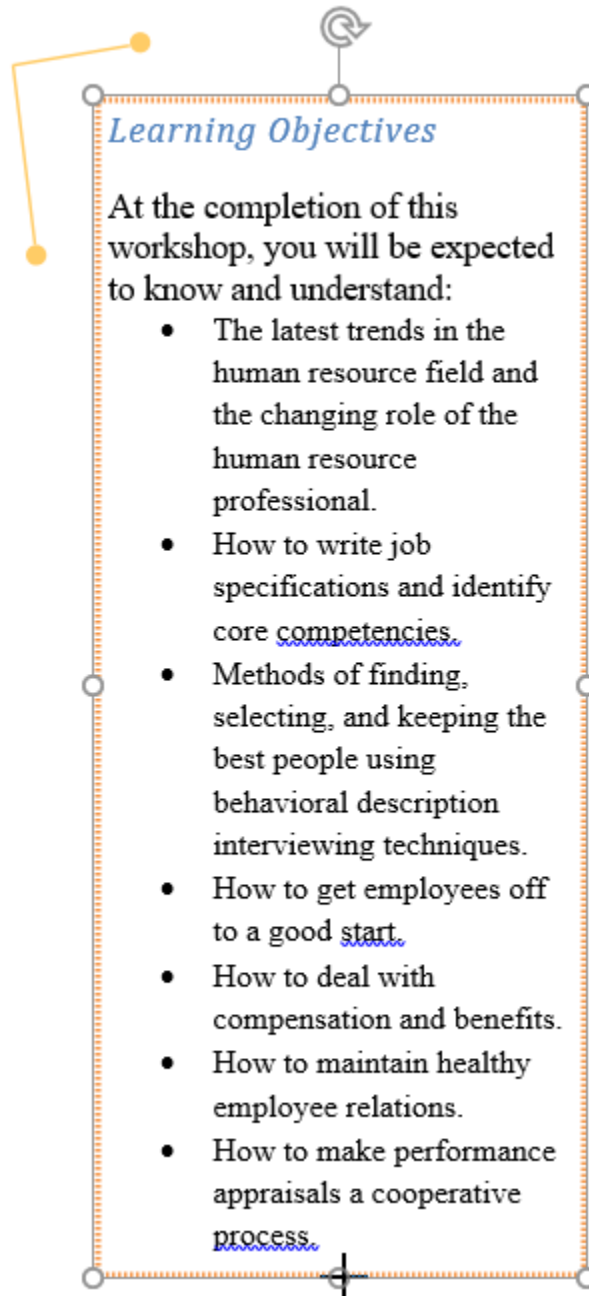
In today's fast-moving world, many managers and supervisors are expected to deal with some human resource issues. They may be asked to take part in developing job descriptions, sit in on interviews, or take responsibility for discipline. This three-day workshop will introduce those managers to human resource concepts. We will walk you through the hiring process, from 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).



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.

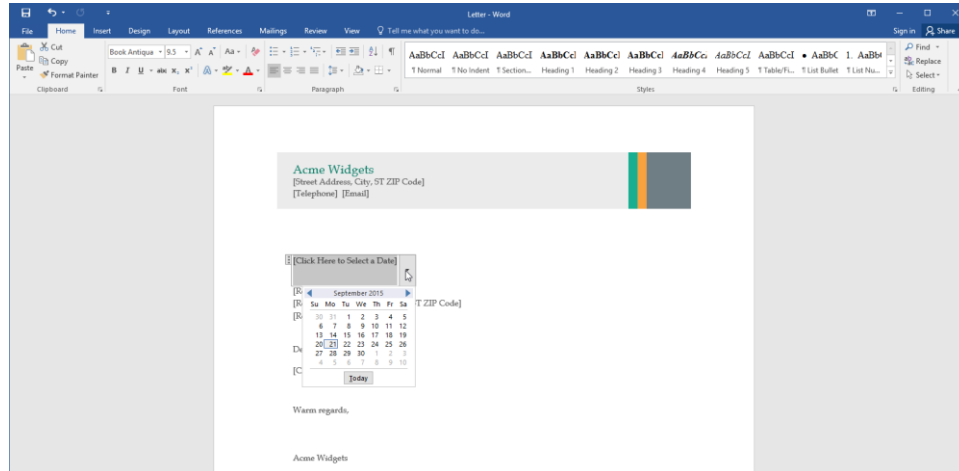
Microsoft Word templates are saved as **.dotx files**. This way, they can be re-used without overwriting the template contents. You can also save templates with macros using the **.dotm** extension.

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.

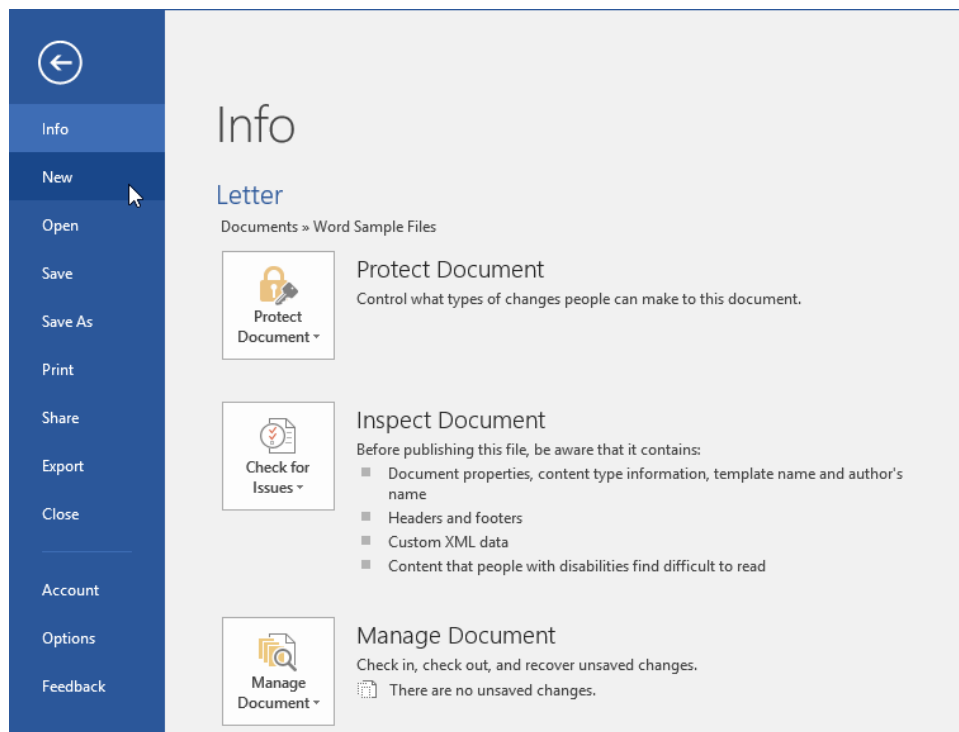
Content Controls

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:

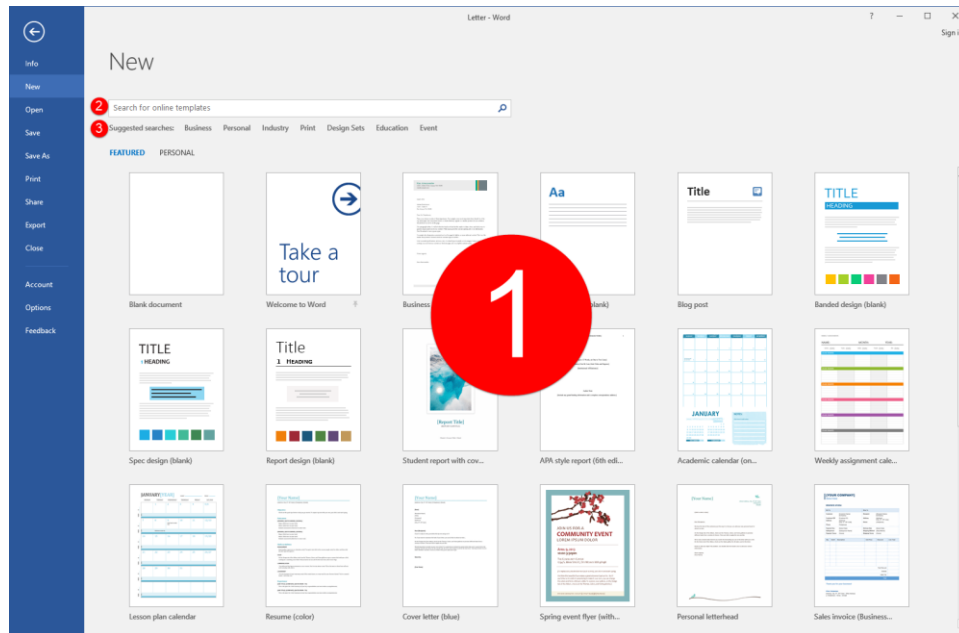


CREATING A DOCUMENT FROM A TEMPLATE

To create a document from a template, click File → New:

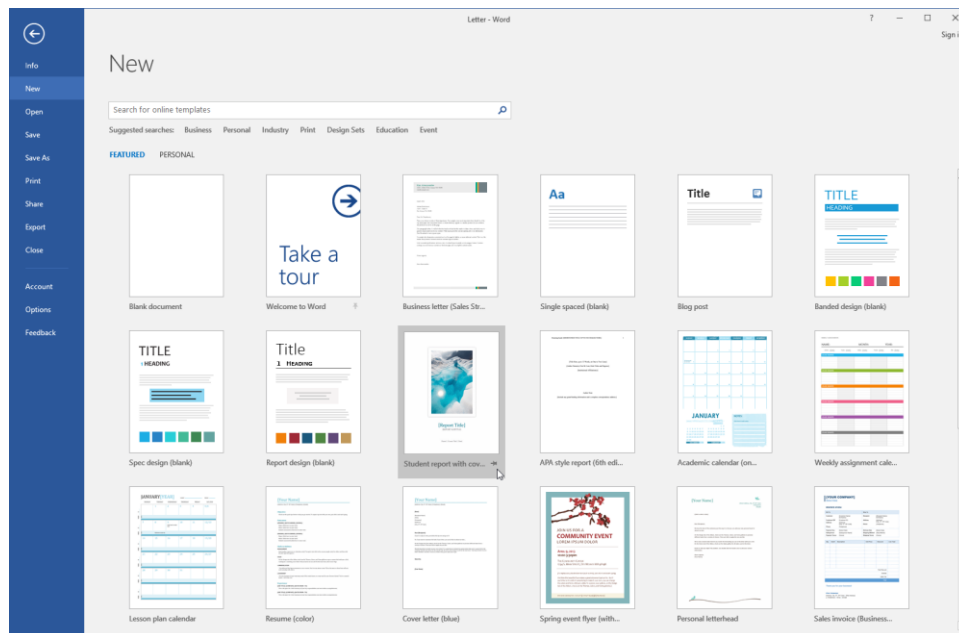


With the New category displayed, you will see a **list of templates (1)** in the middle pane. There is also a **search box (2)** with **suggested search links (3)** at the top of the window:



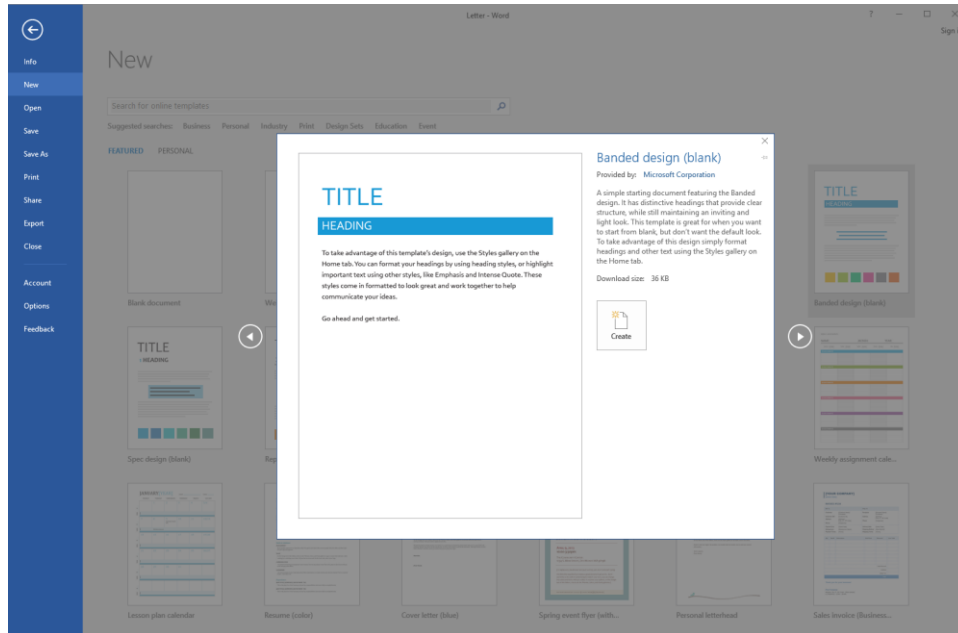
(Note that Internet access is recommended for the best results.)

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:

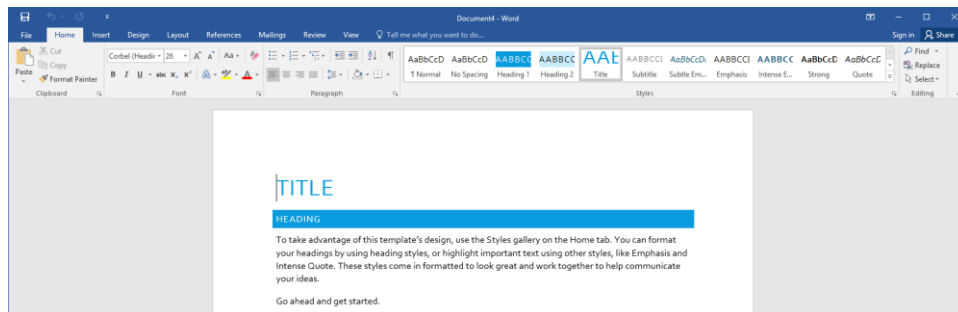


You can always click this icon again to unpin it.

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:

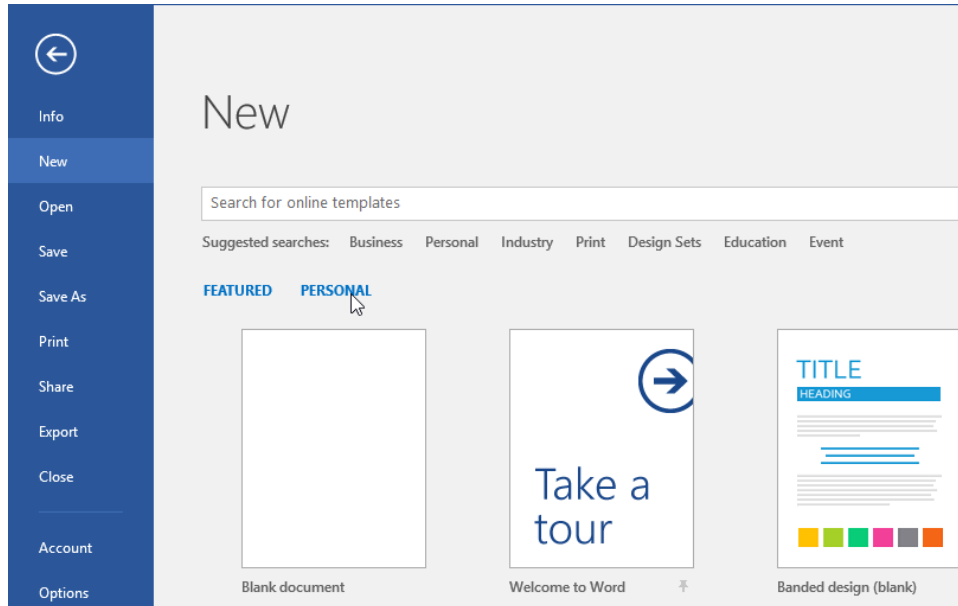


You can click the left or right arrows to preview different templates, or click Create to download the template and open it as a Word document, ready for editing. This is the option we have chosen for this example:

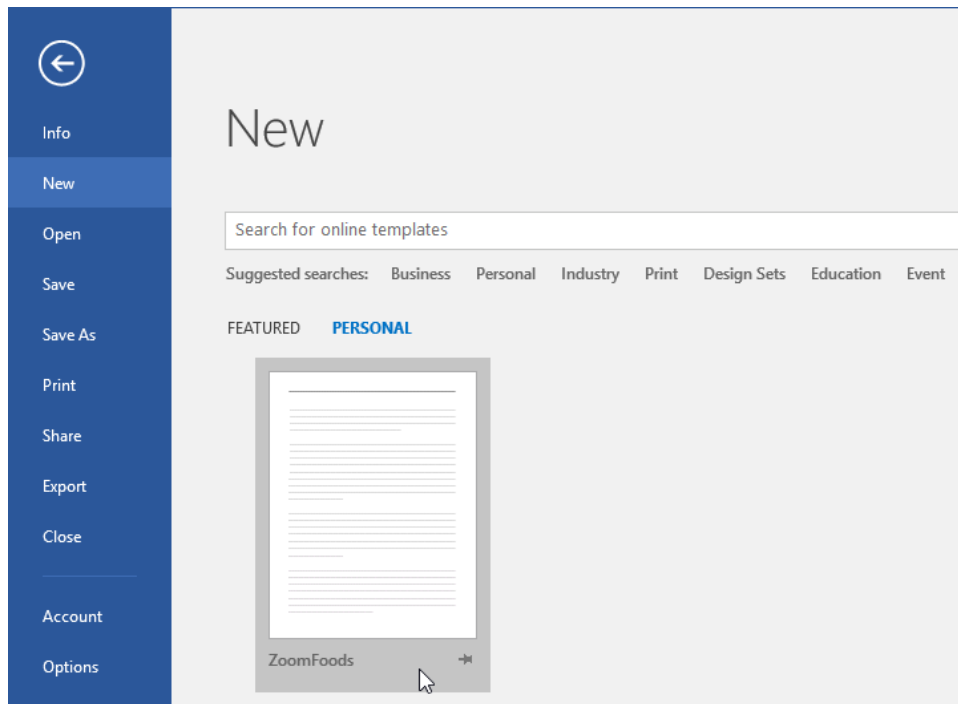


VIEWING PERSONAL TEMPLATES

To view templates that you have saved to your computer, click the Personal link in the New category of Backstage view:



Templates stored in your user account will now be displayed. Click the desired file to create a new document from it:



TEMPLATE STORAGE LOCATIONS

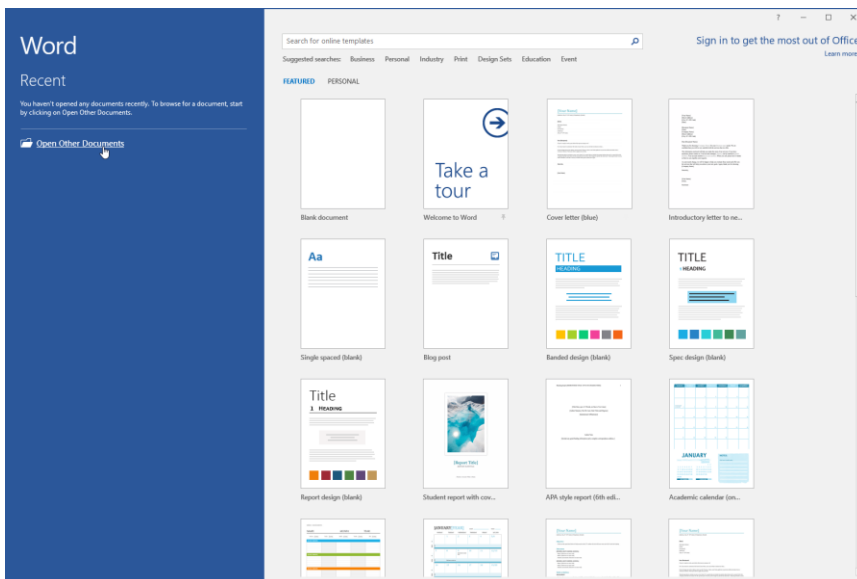
Your personal templates are typically saved in **C:\Users\\Documents\Custom Office Templates**. Templates that are included with Microsoft Word, or that have been downloaded locally, are saved in **C:\Users\\AppData\Roaming\Microsoft\Templates**.

ACTIVITY 7-1

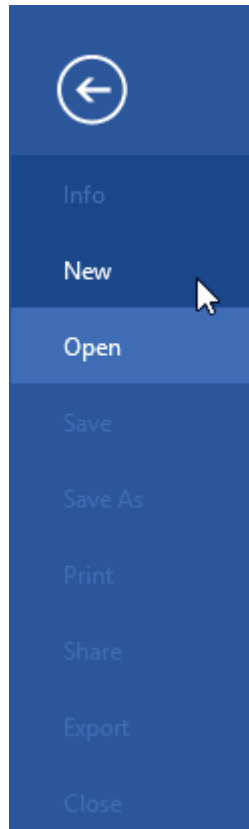
Creating a Document Using a Template

In this activity, you will set up a scorecard using a template. Internet access is required for this exercise.

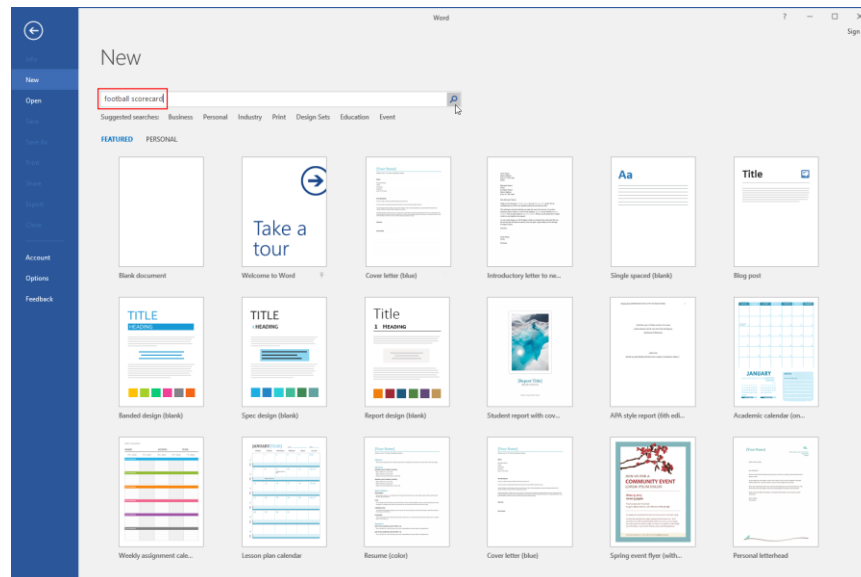
1. To begin, open Microsoft Word 2016.
2. On the Start screen, click the Open Other Documents link to switch to Backstage view:



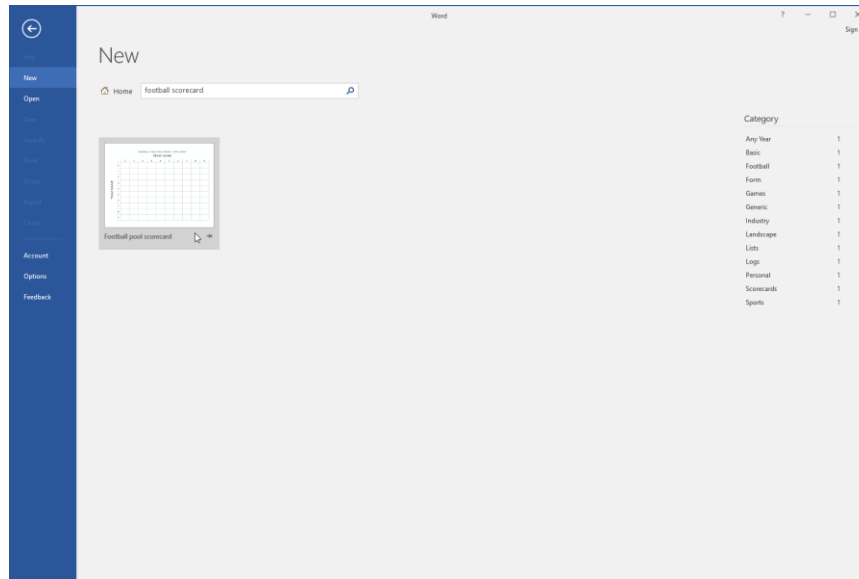
3. Click the New category:



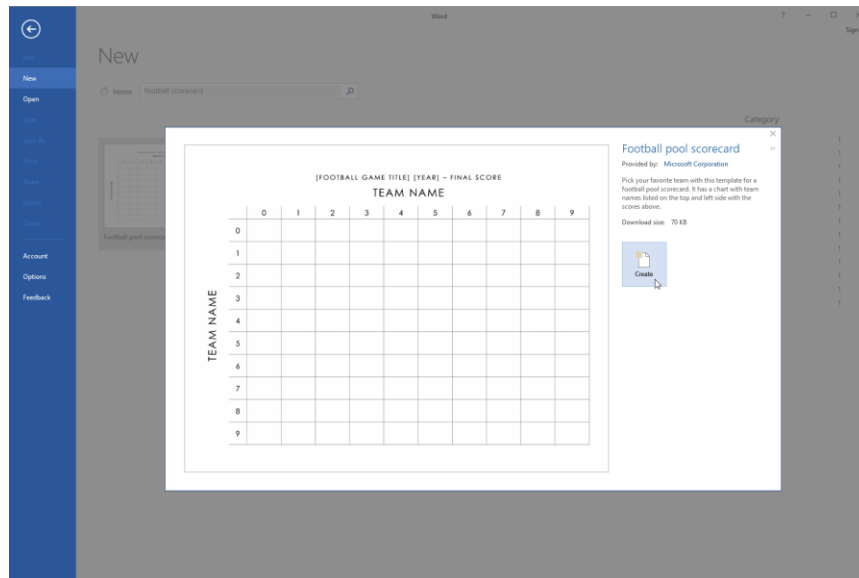
4. In the search field, type “football scorecard.” Click the magnifying glass to perform the search:



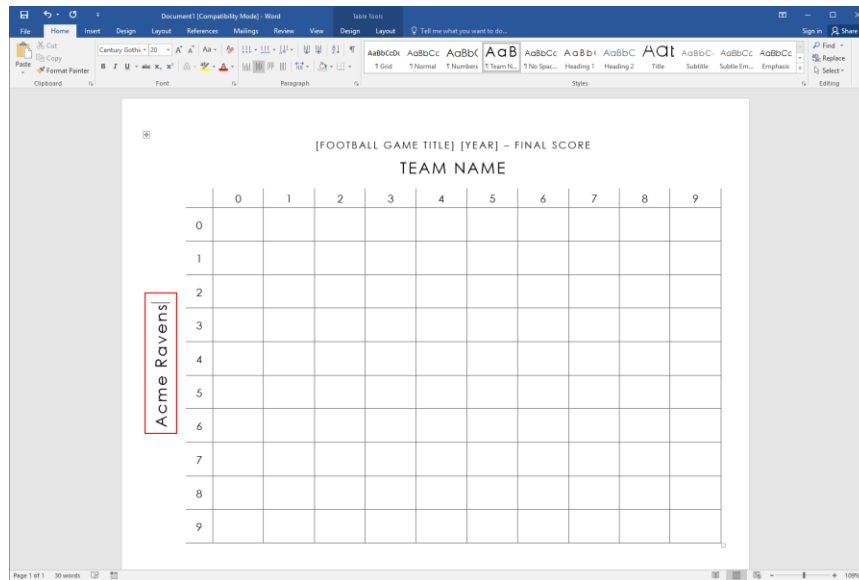
5. One result should appear. Click its thumbnail to select it:



6. Click Create to confirm the process:

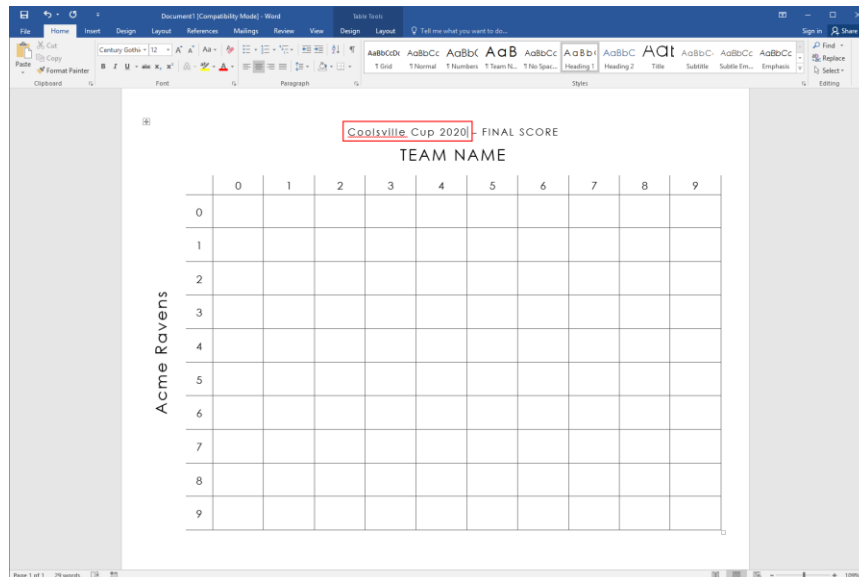


- The template will download and open. Enter the name of your favorite football team on the left-hand side:

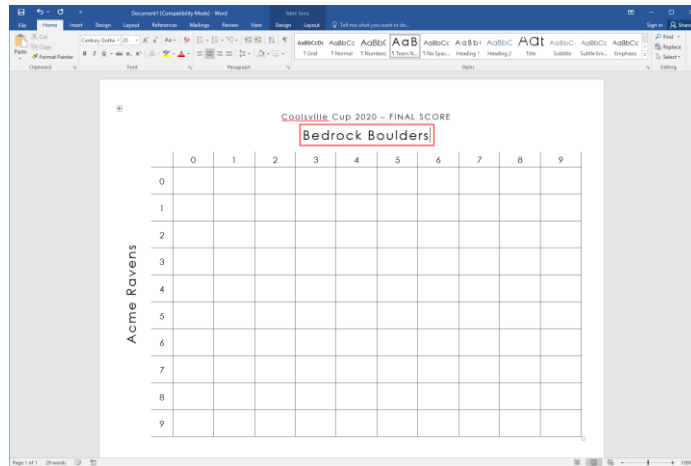


(You can use our sample team name, Acme Ravens, if you can't think of anything.)

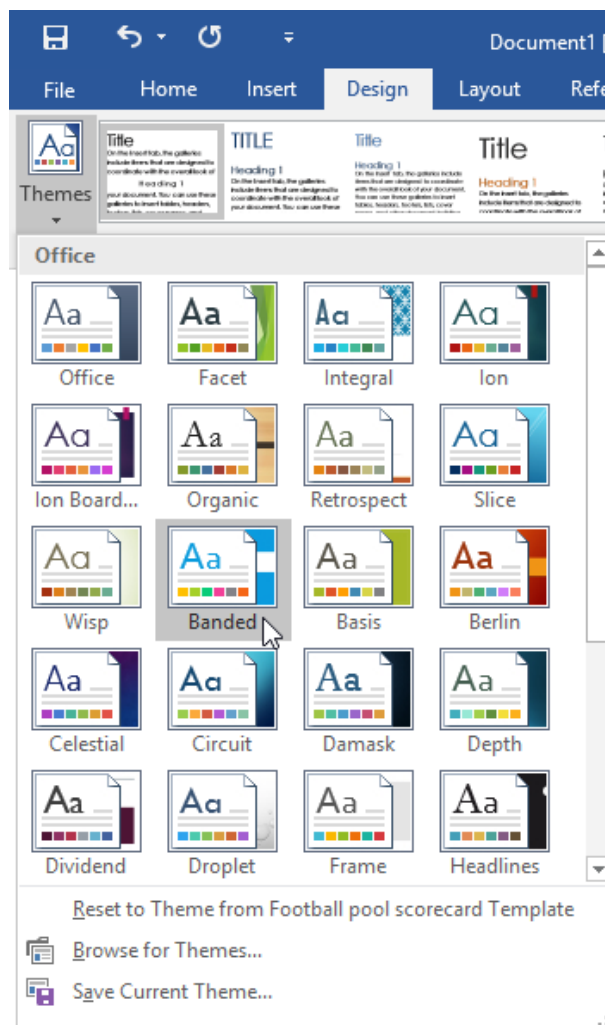
- Type in "Coolsville Cup" for the game title and "2020" for the year:



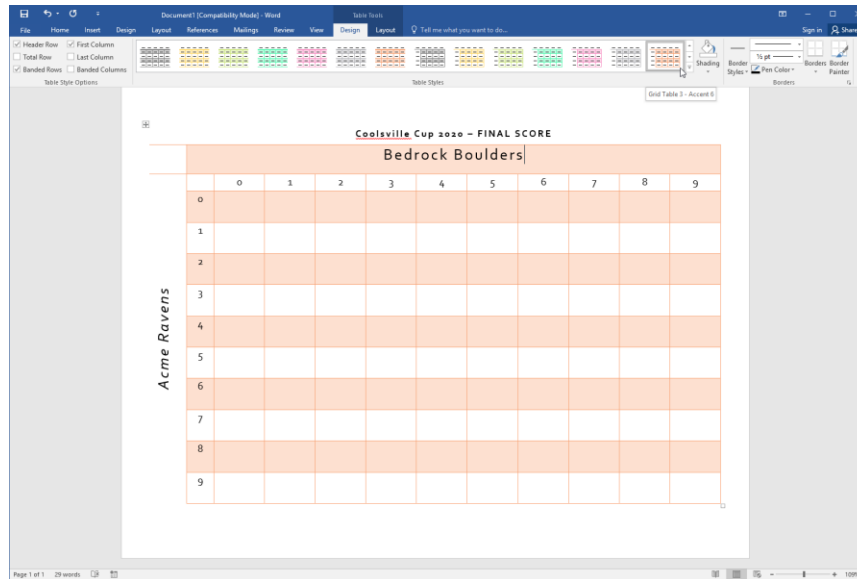
9. Type “Bedrock Boulders” for the top team name:



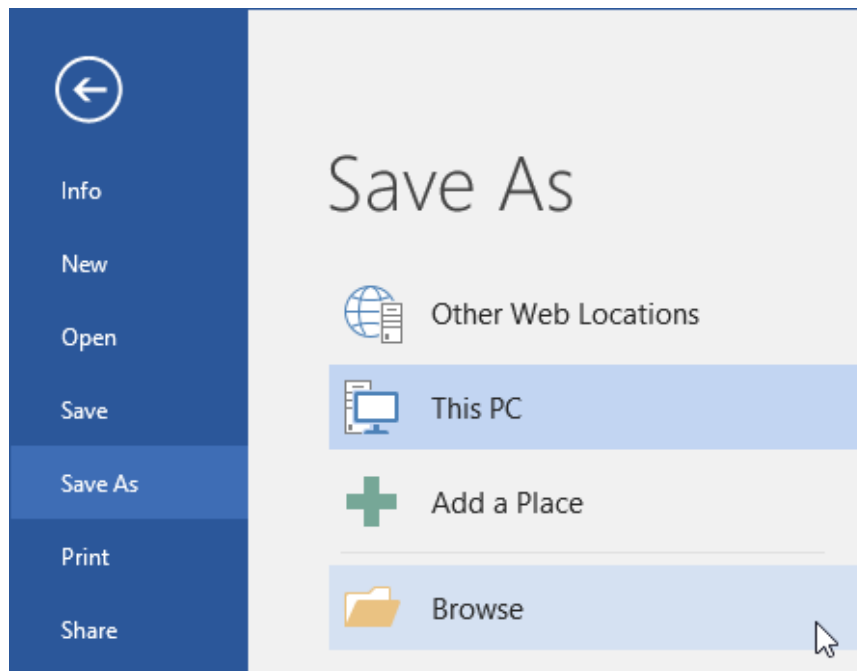
10. Let's customize the document a bit more. Click Design → Themes → Banded:



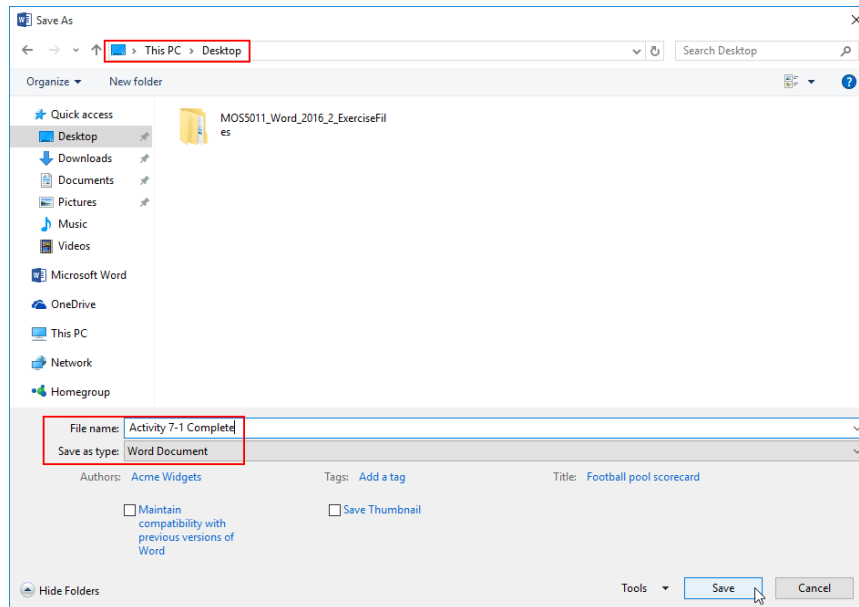
11. Now, click the Table Tools – Design tab and pick a new style for the table:



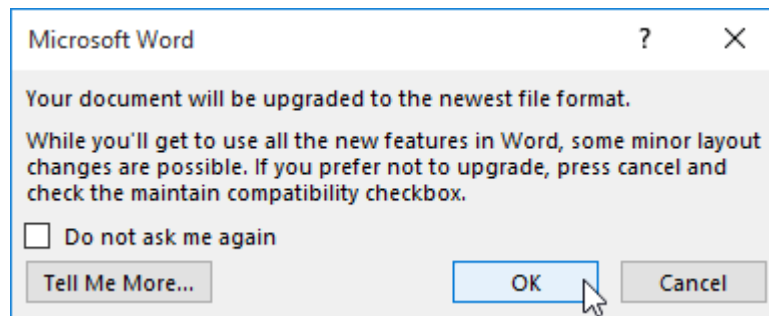
12. Click File → Save As → Browse:



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:



14. When prompted to convert the file, click OK:



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.

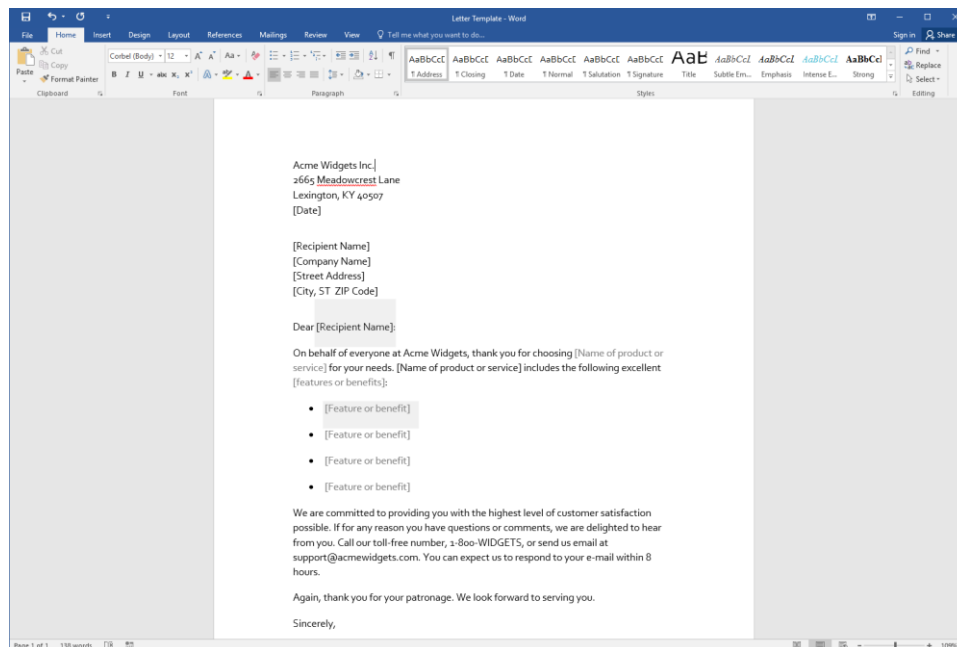
Topic Objectives

In this topic, you will learn:

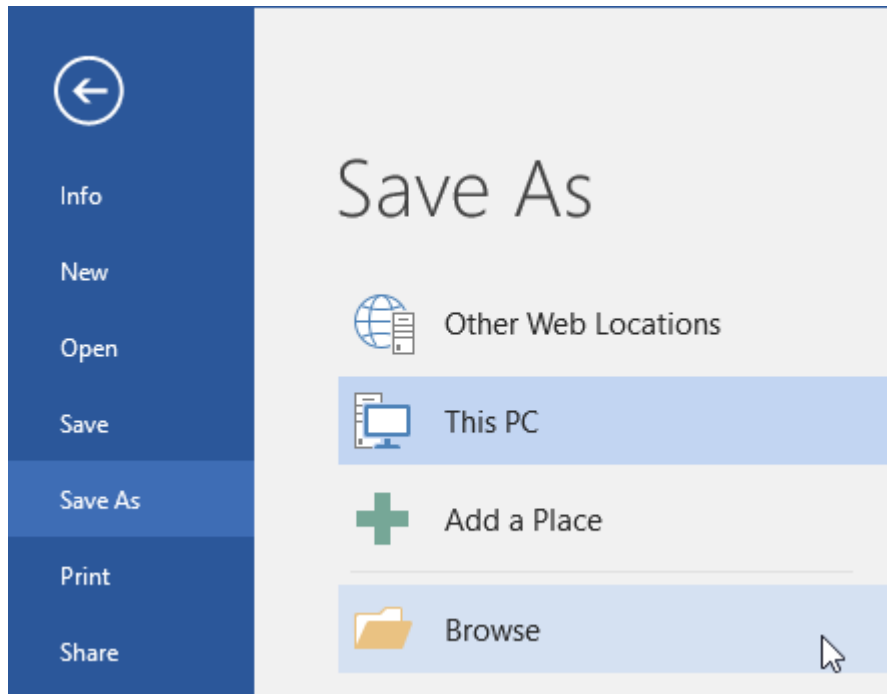
- How to create a new template
- How to modify an existing template
- How to attach a template to a document
- About the Organizer
- About the default template location

CREATING A NEW TEMPLATE

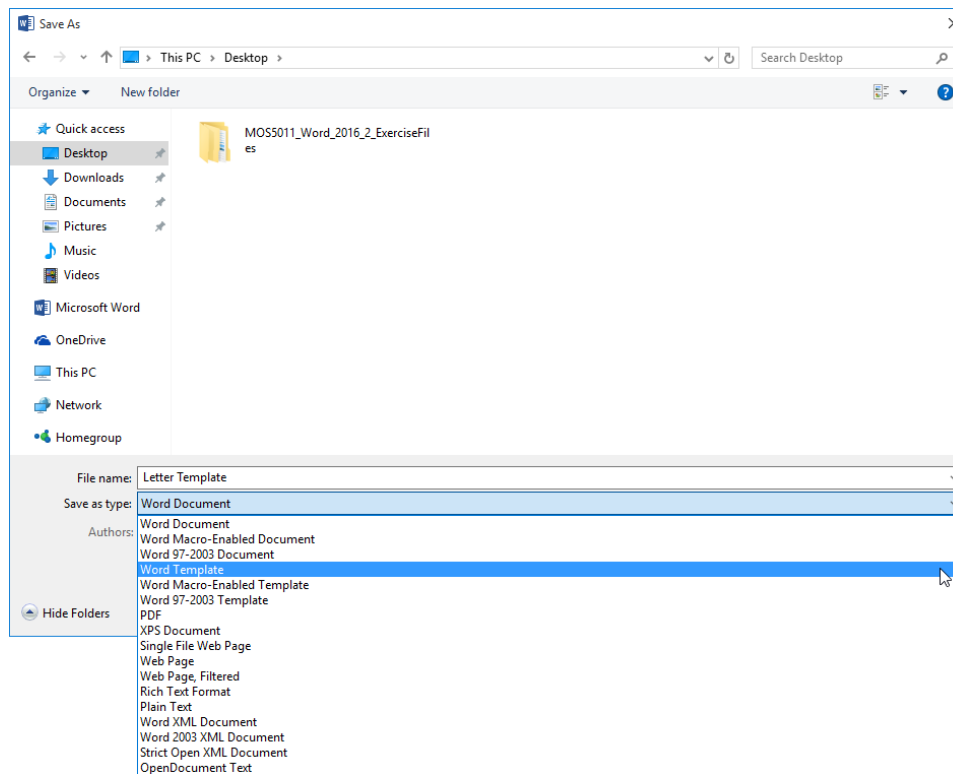
If you want to create your own template, it's easy! First, create the document with placeholder information. For example, if you are creating a letter template, you might want to include the company name and information, but leave the other fields blank:



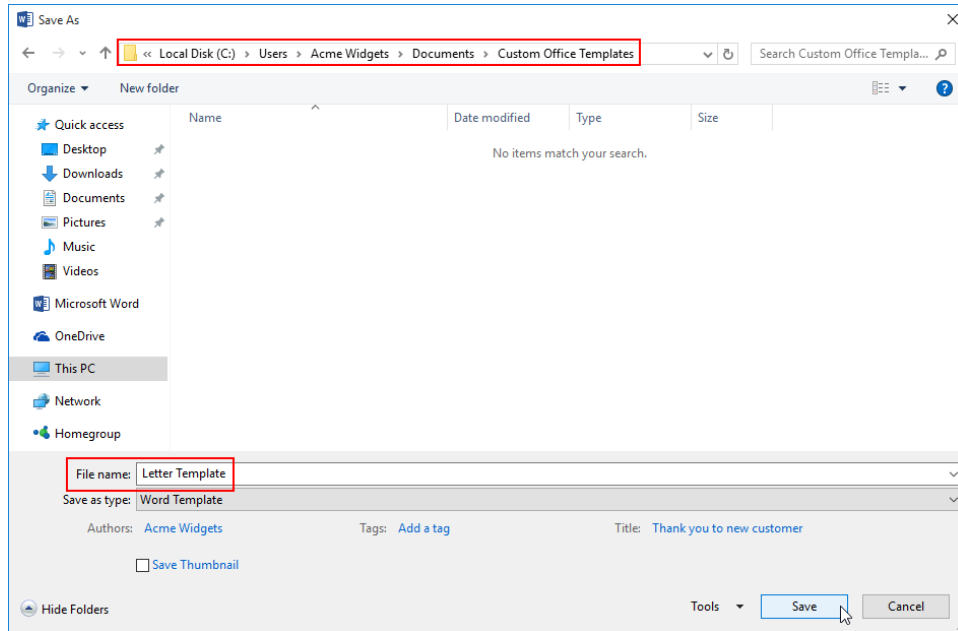
Once relevant information has been placed in the template, save it by clicking File → Save As → Browse:



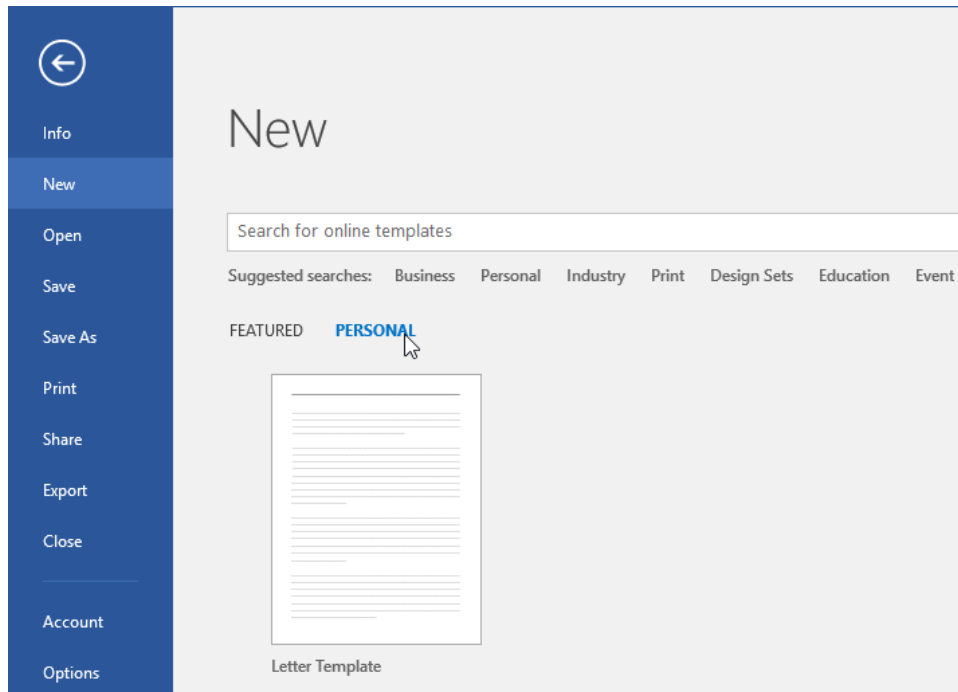
The Save As dialog will open. First, click the “Save as type” menu and choose Word Template:



This will automatically choose the correct file location for you. Now, enter a file name and click Save:

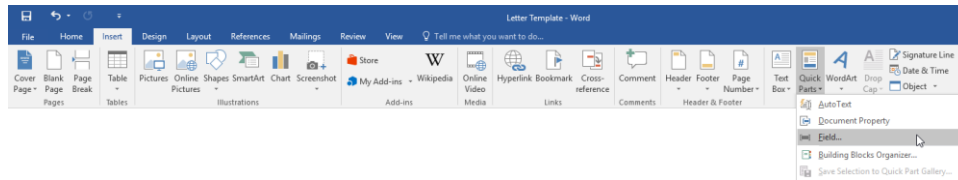


Saving the file in the default location will ensure that it is displayed in the Personal category of the New category in Backstage view:

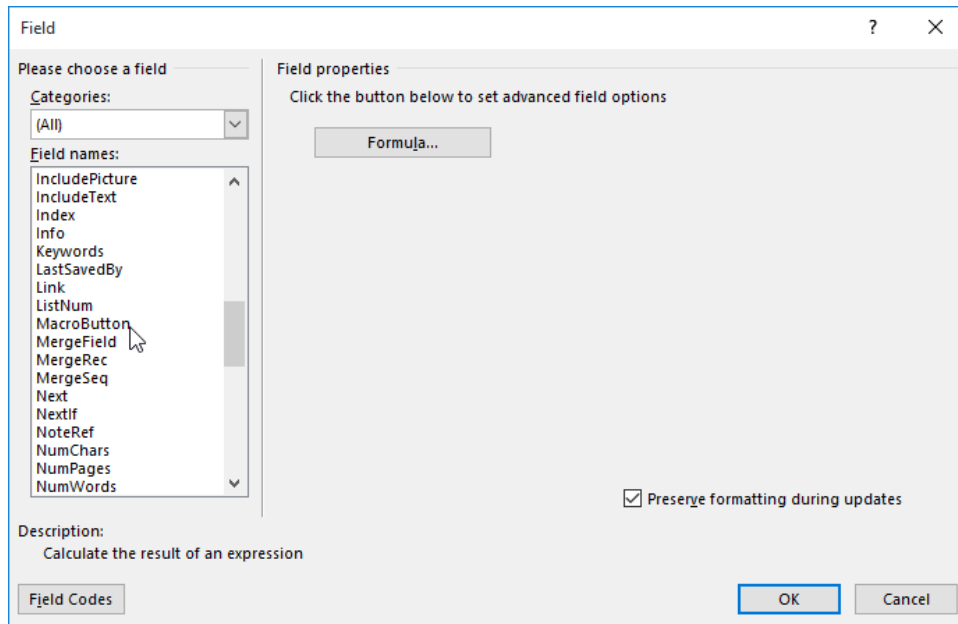


MacroButton Fields

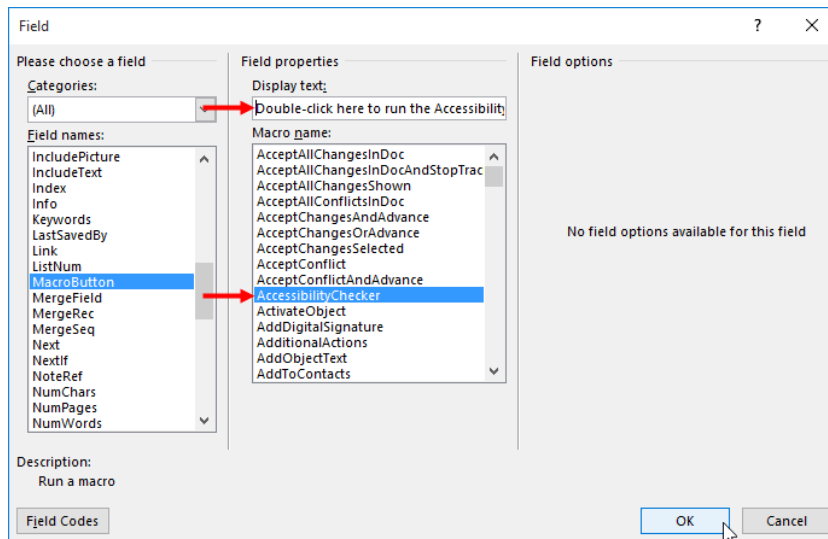
You can also use fields to make using templates even easier. To begin, place your cursor where you want the field to go. Then, click Insert → Quick Parts → Field:



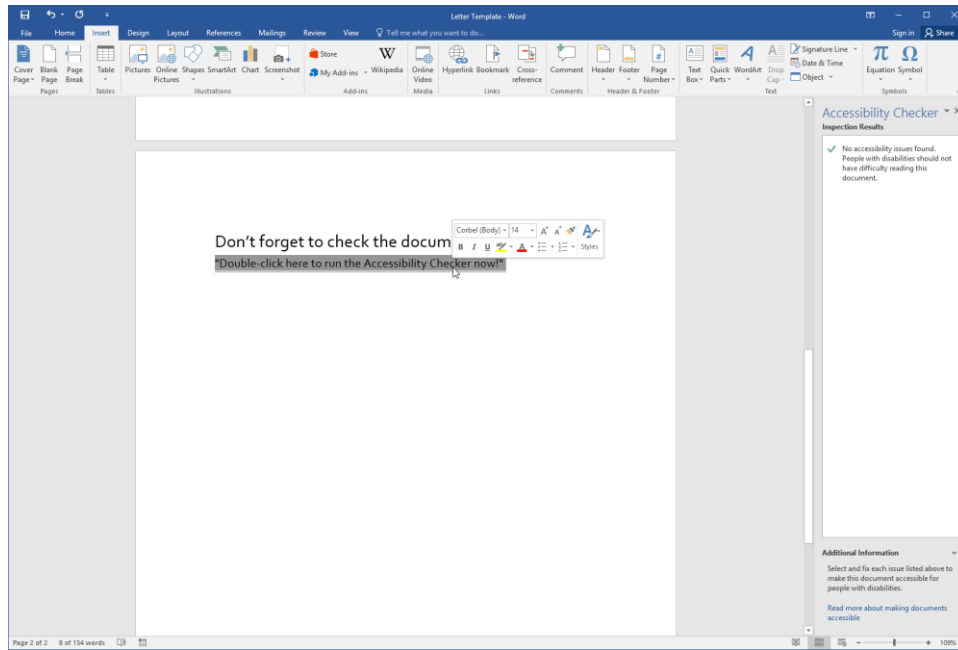
In the Fields dialog box, locate and select the MacroButton category:



Now, you can choose the desired action and set the display text. Click OK:

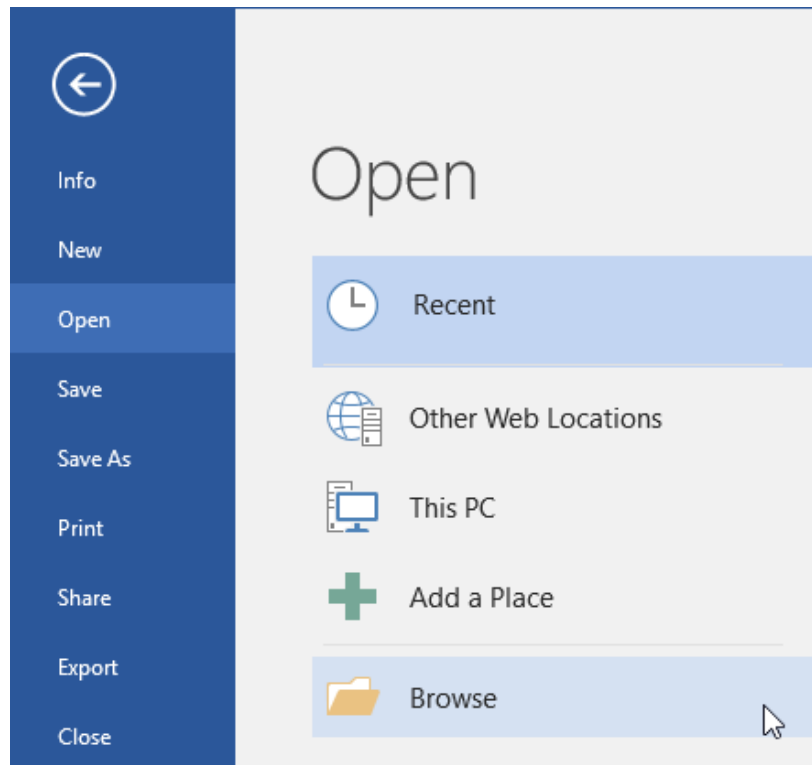


The field will be inserted and will run the related command when double-clicked:

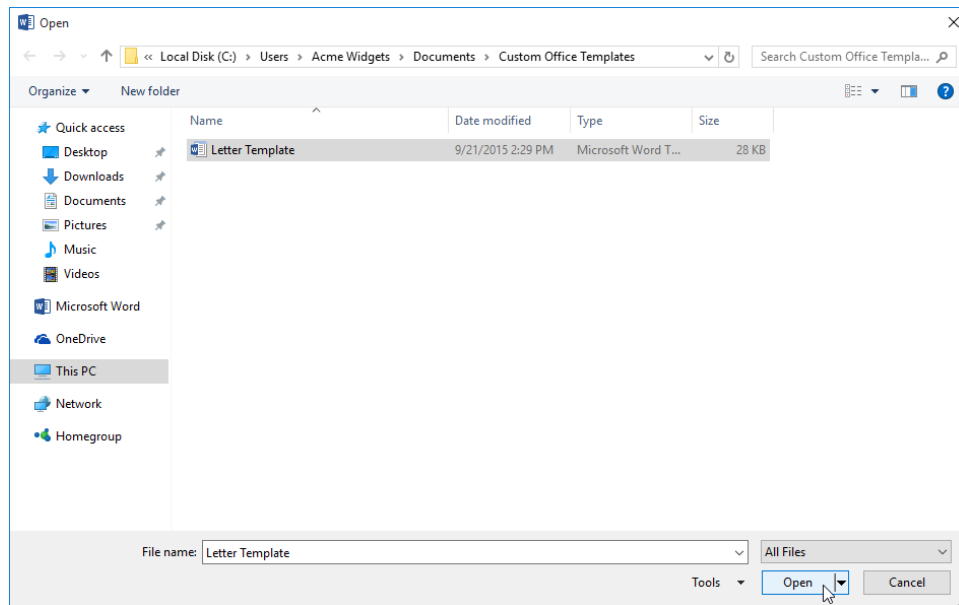


MODIFYING A TEMPLATE

To modify a template, click File → Open → Browse:

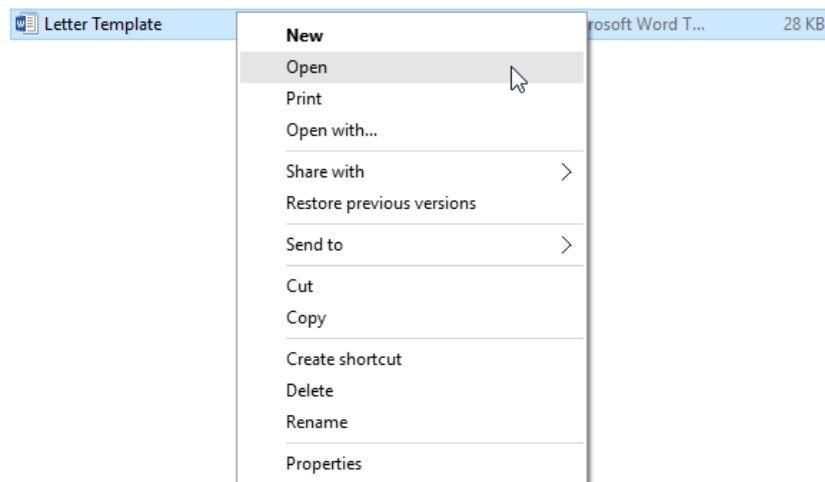


In the Open dialog box, navigate to the location of the template file, select it, and click Open:

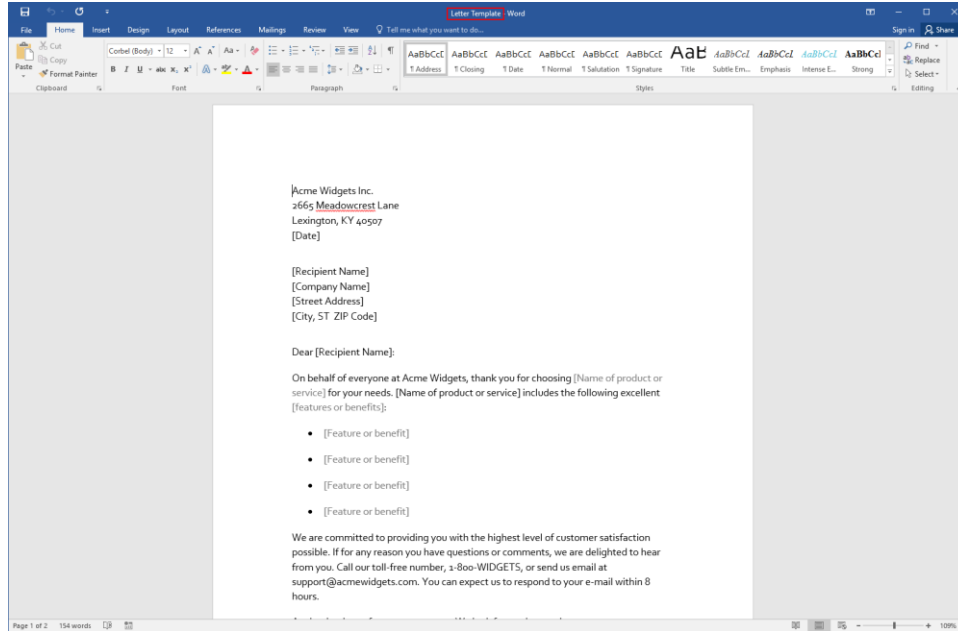


(If you cannot see your template file, ensure that the filter above the Open button is set to All Files.)

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:



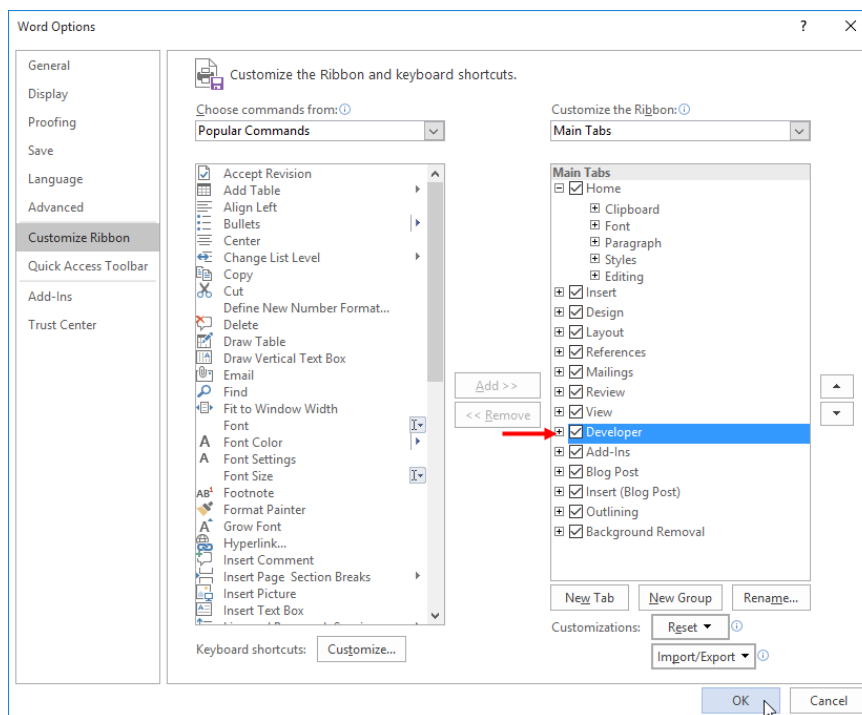
With either of these actions, the template file will open and let you make changes. Word’s title bar will display the template name (not Document1, Document2, etc.):



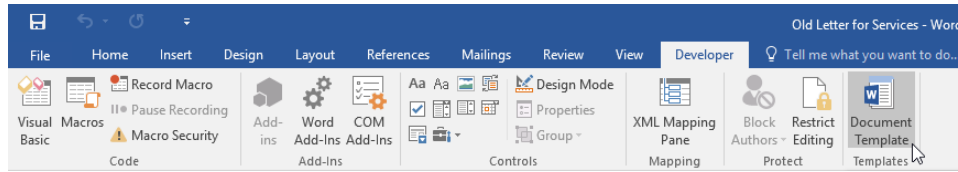
ATTACHING A TEMPLATE TO A DOCUMENT

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.

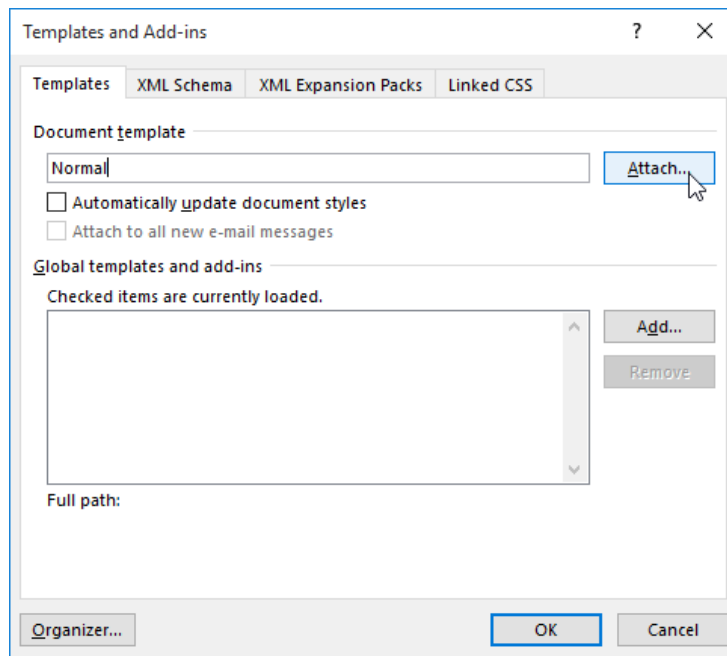
First, make sure the Developer tab is visible. You can enable this tab by clicking File → Options → Customize Ribbon. Then, in the list on the right-hand side, check Developer. Click OK to apply the change:



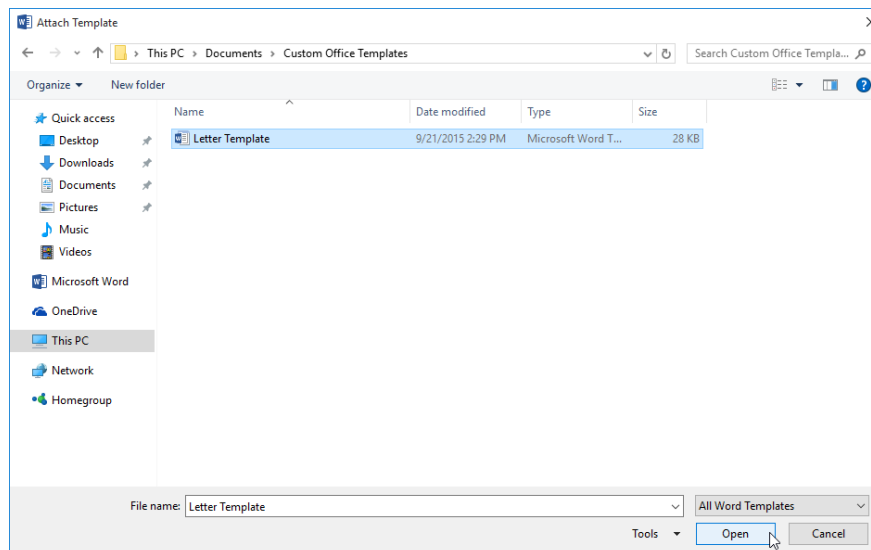
Now open the old document you want to enhance with the new template. Click Developer → Document Template:



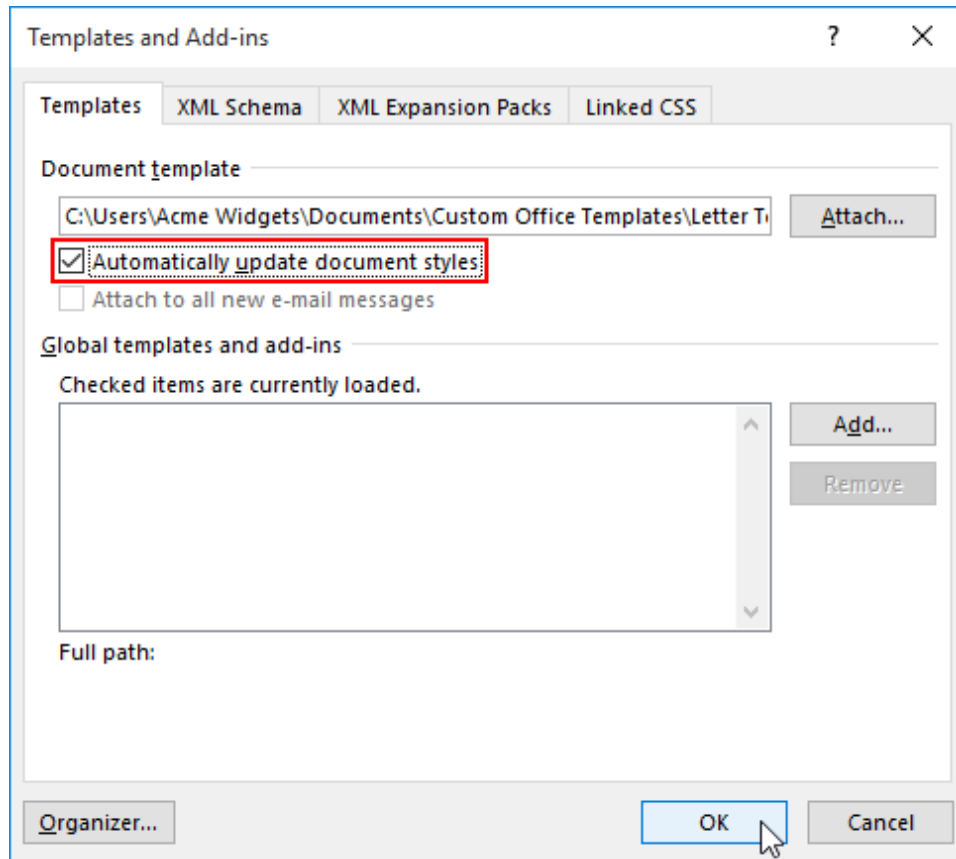
The Templates and Add-ins dialog will appear. Click the Attach button:



Choose the template that you want to attach to the document and click Open:



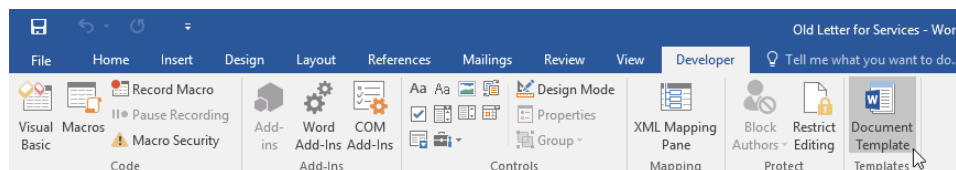
Back in the Templates and Add-ins dialog, check “Automatically update document styles” and click OK:



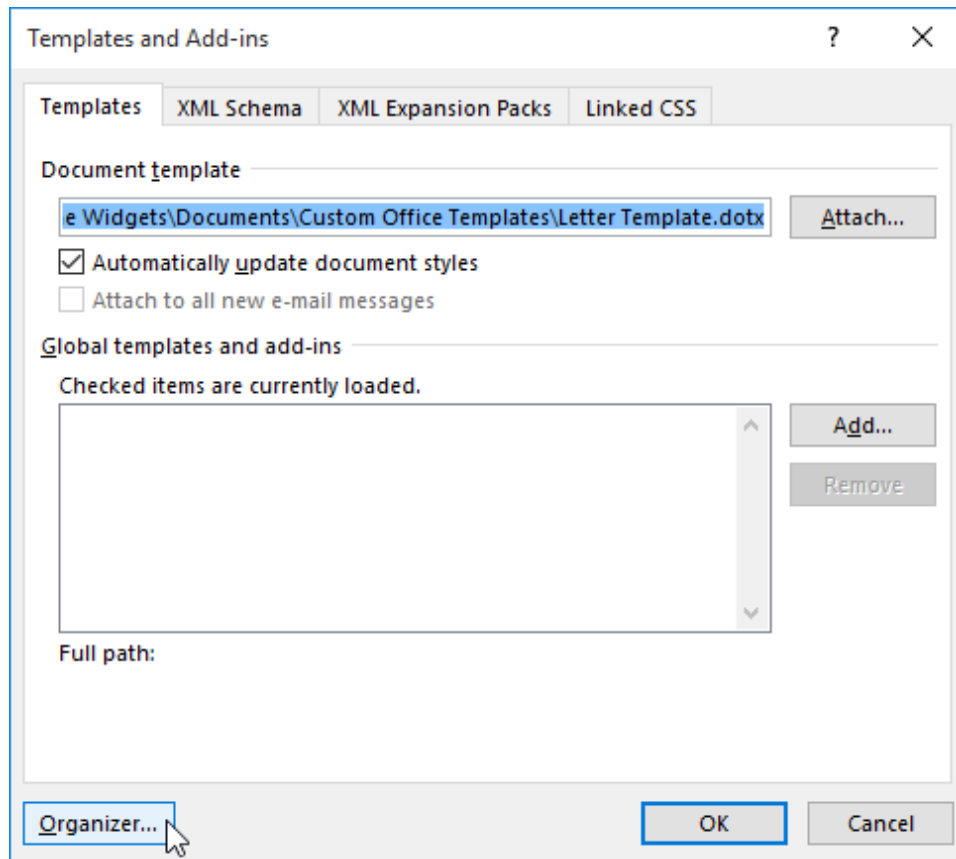
The old document will now be using the components defined in the template. You will likely need to do some tweaking, but the basic elements should be intact.

MANAGING TEMPLATES WITH THE ORGANIZER

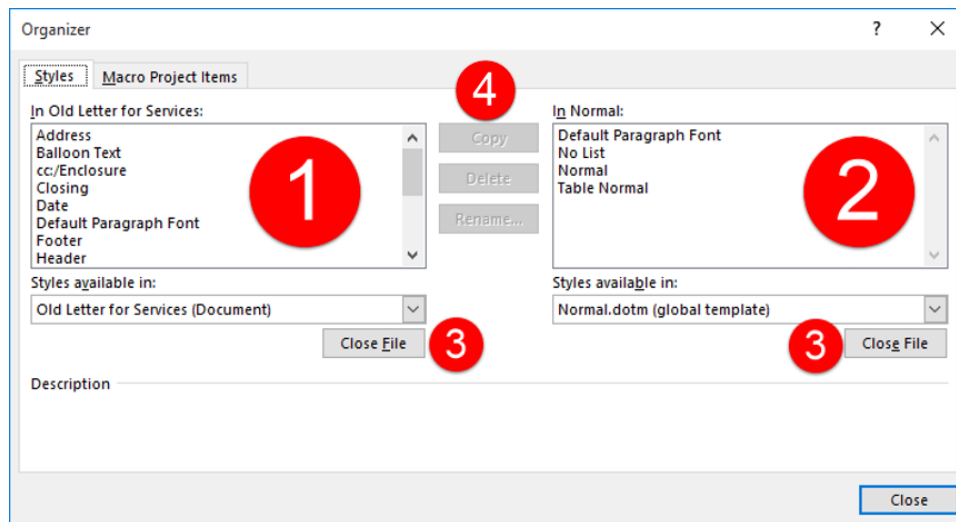
You can also copy individual styles from a template to a particular document. To begin, ensure that the Developer tab is displayed. Then, click Developer → Document Template:



In the Templates and Add-ins dialog, click Organizer:



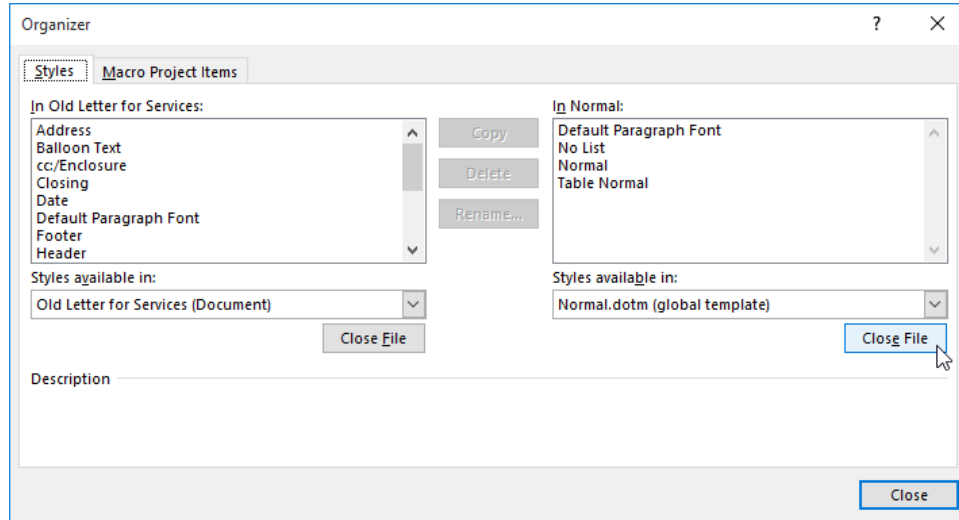
The Organizer dialog will appear:



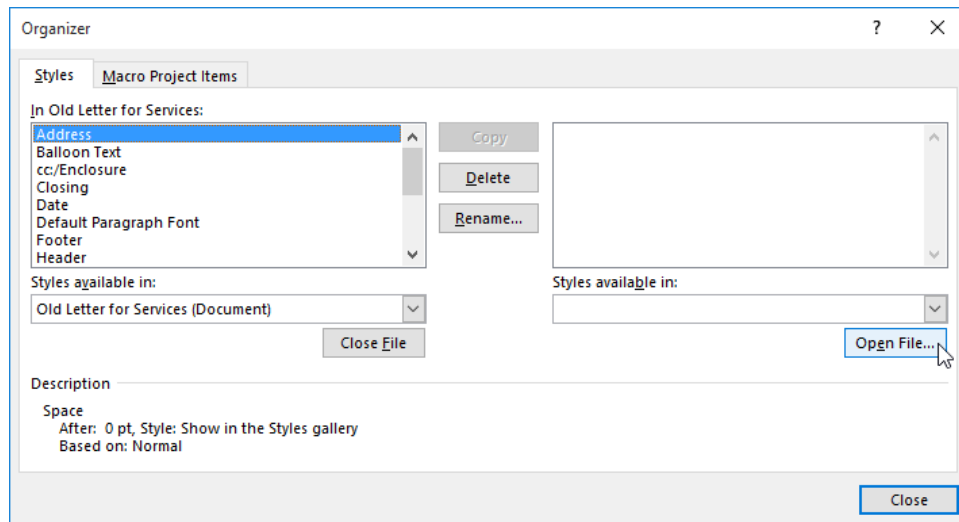
Your **current document** should appear on the left **(1)**. On the right, you will see all styles that have been saved in **Normal.dotm (2)**, the document template for all new blank documents opened in Word. You can use the **drop-down menus and the Close File buttons (3)** for each list to modify 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.

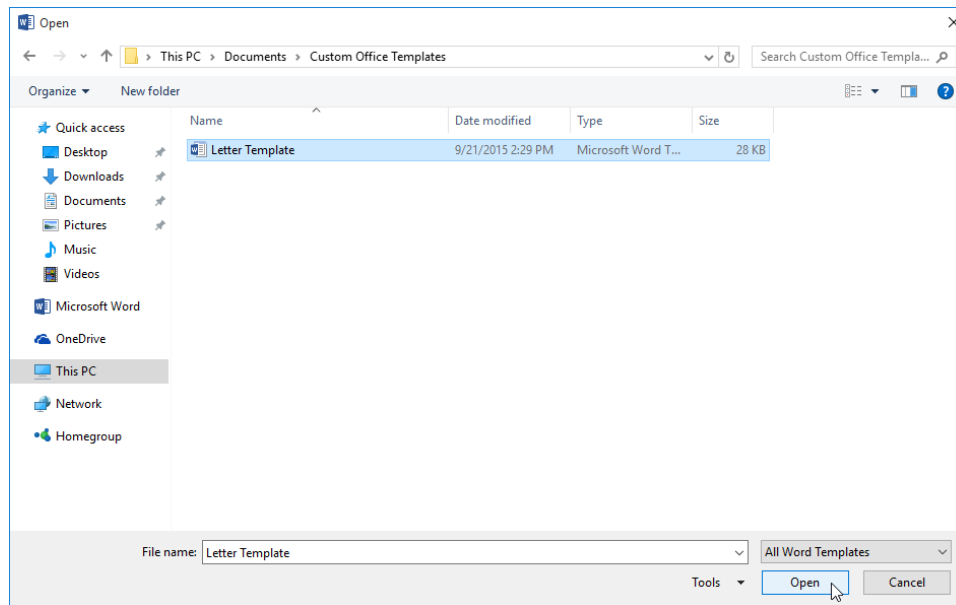
For example, let's close the Normal template:



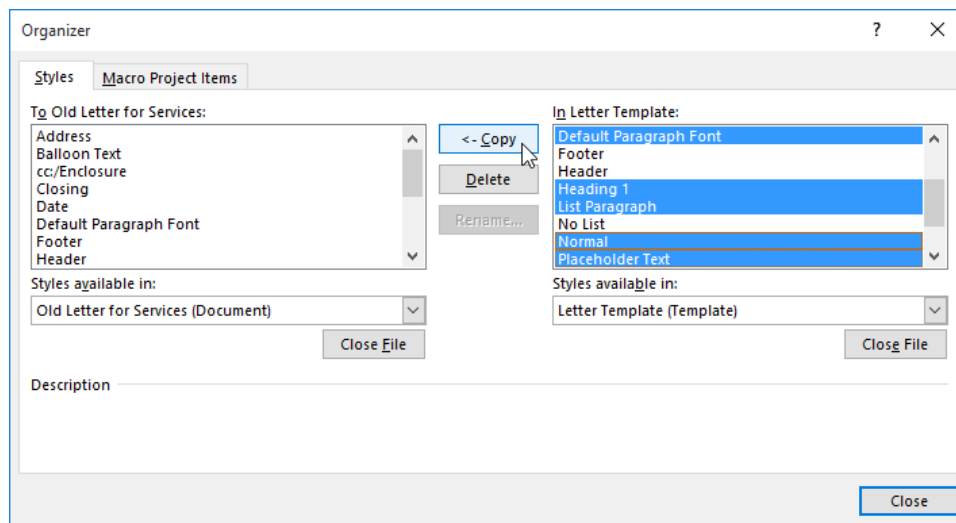
We can now click Open File to choose a new template:



Now, we can use the Open dialog to select the template whose styles we want to view:



The styles from this template will now be shown in the Organizer. Let's copy some of these styles to our current template:

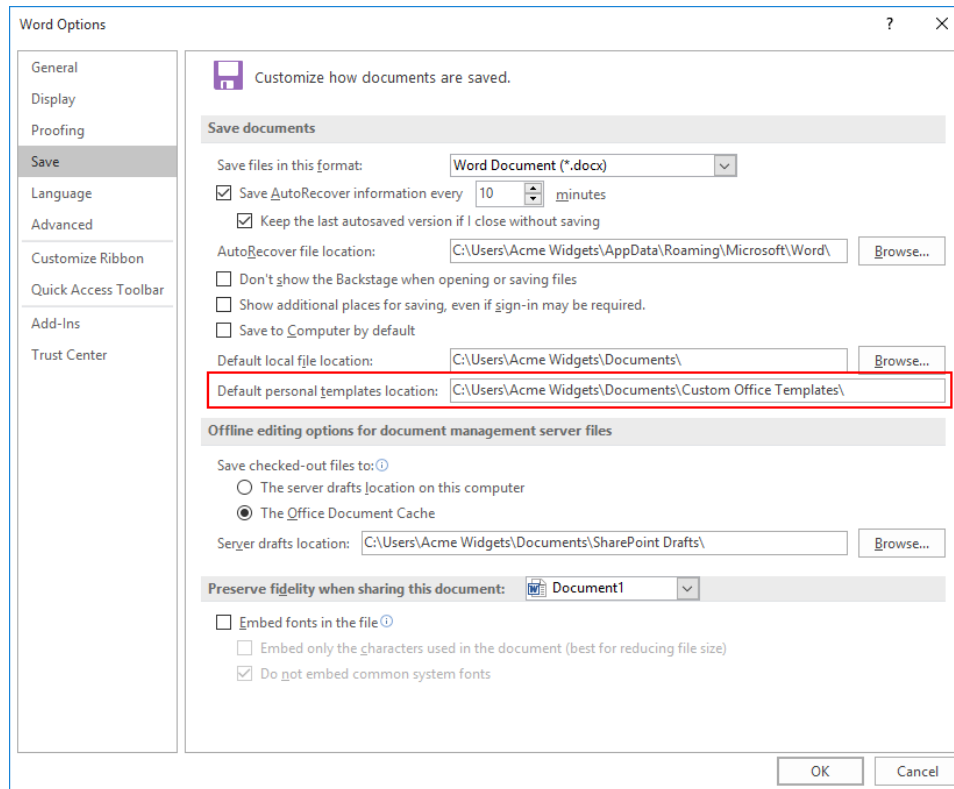


(Note that you will be prompted to confirm delete operations, as well as copy operations if a style with the same name already exists.)

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\\Documents\Custom Office Templates**. You can change this location in the Save category of the Word Options dialog box:

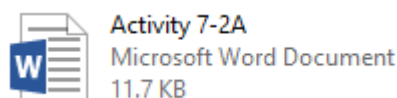


ACTIVITY 7-2

Creating a Template

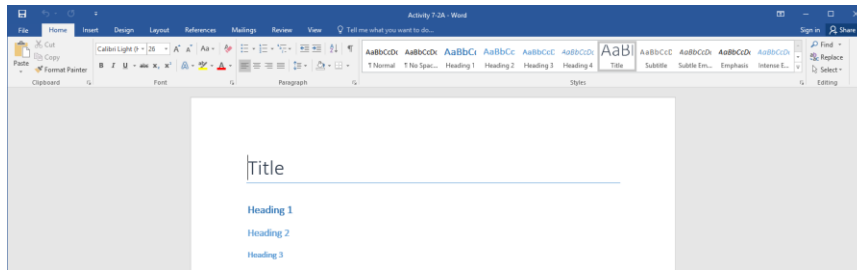
In this activity, you will create a template. You will also add styles to it and modify the existing styles.

1. To begin, open Microsoft Word 2016 and open Activity 7-2A:

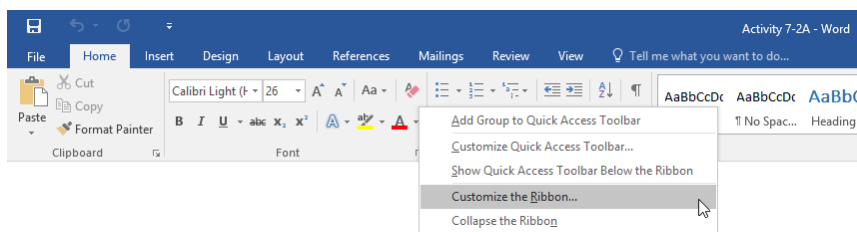


(Notice that this is a regular Microsoft Word document.)

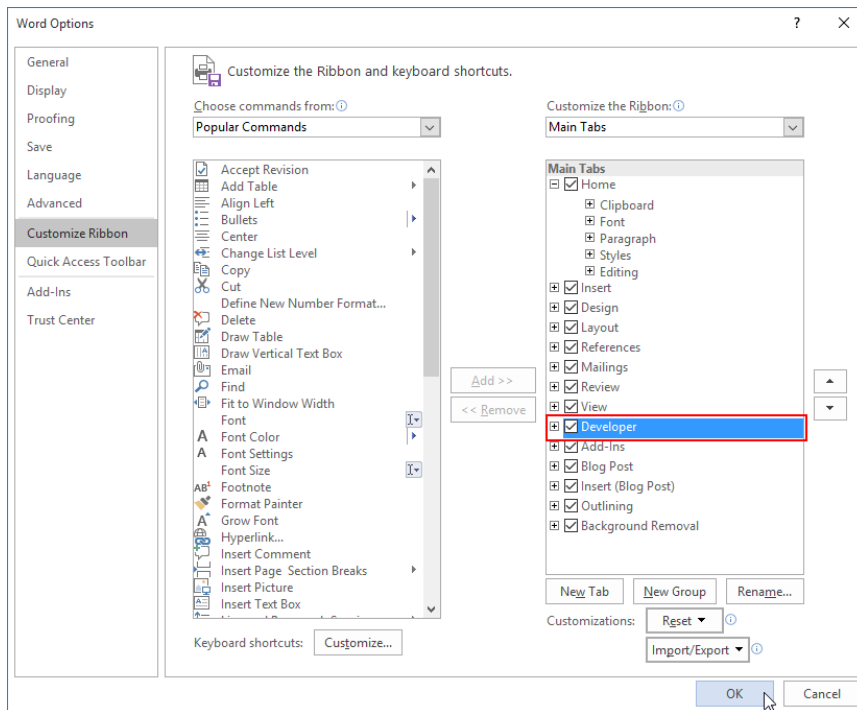
2. Examine the formatting in the document:



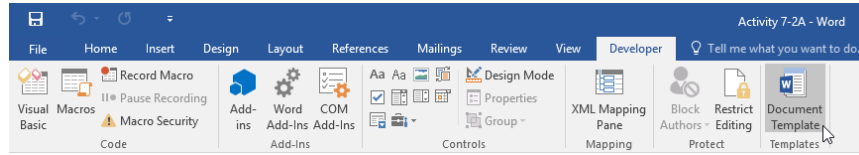
3. Now, we need to enable the Developer tab. Right-click a blank area of the ribbon interface and click “Customize the Ribbon.”



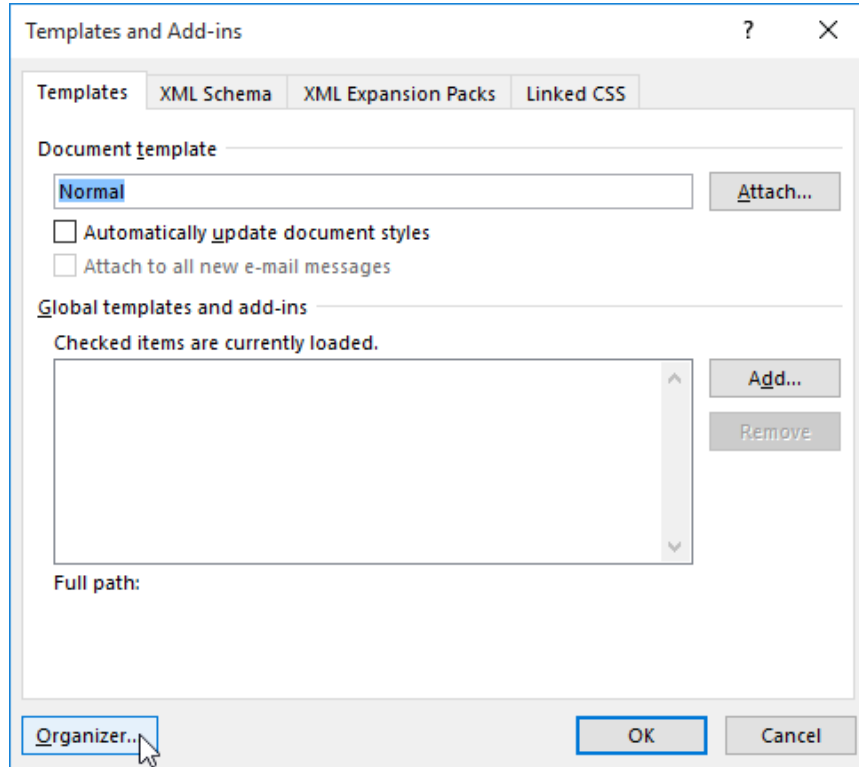
4. The Word Options dialog box will open to the Customize Ribbon category. In the list on the right-hand side, check Developer. Click OK to apply the change:



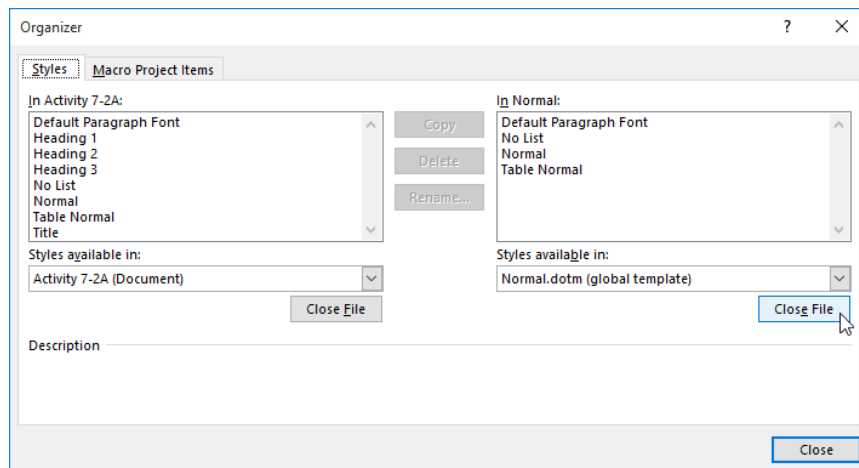
- Now, click Developer → Document Template:



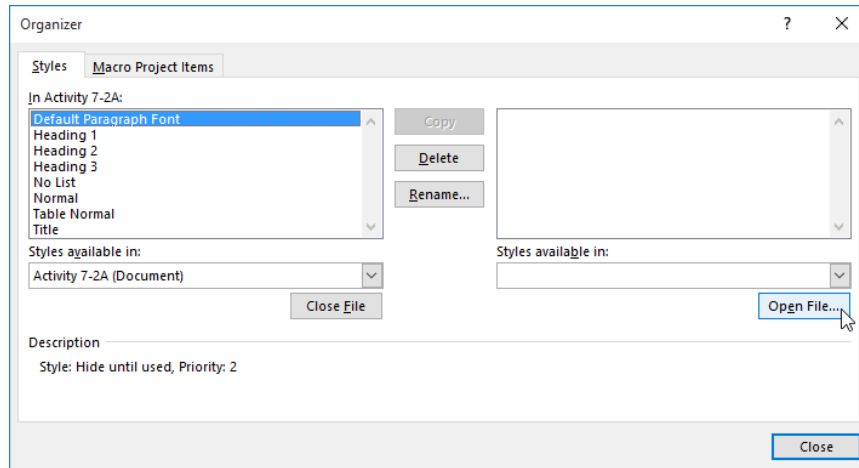
- The Templates and Add-ins dialog will open. Click Organizer:



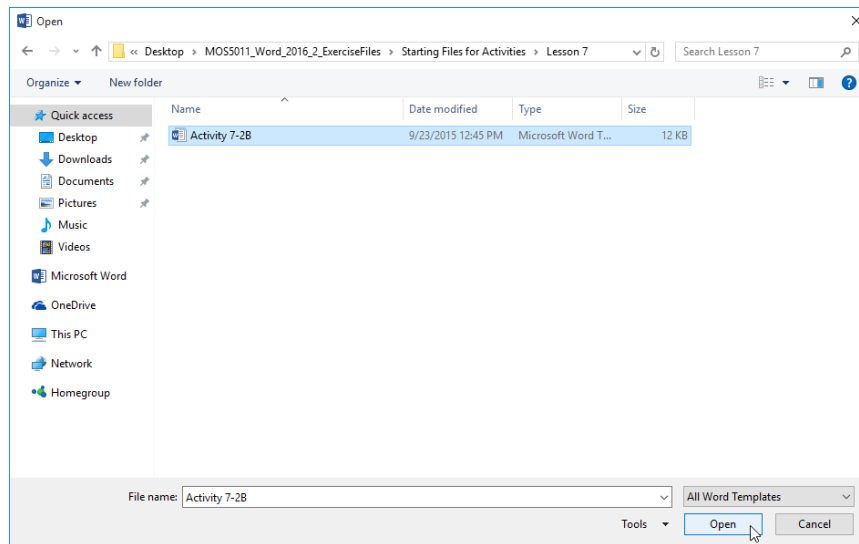
- The Organizer will open. Click the Close File button on the right-hand side of the dialog:



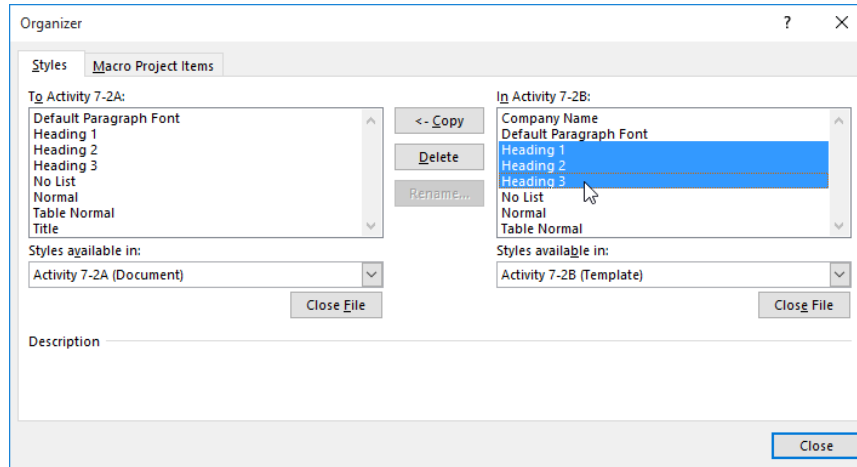
8. The button will now say Open File. Click it:



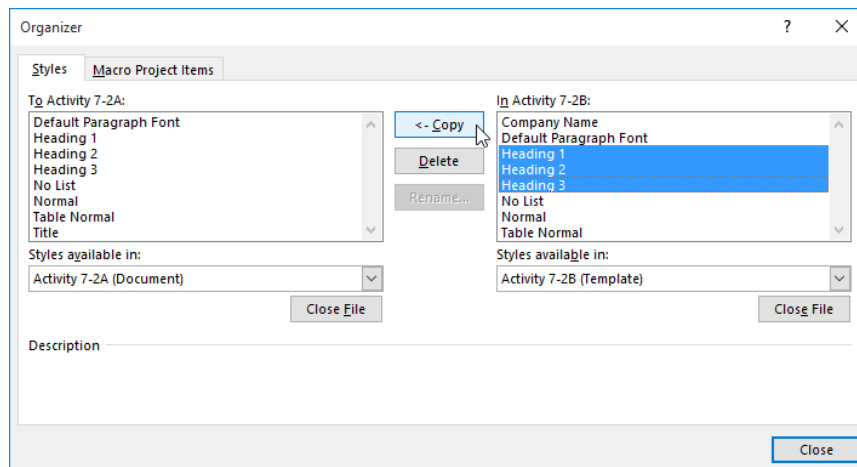
9. Navigate to your Exercise Files folder. Locate and select Activity 7-2B. Click Open:



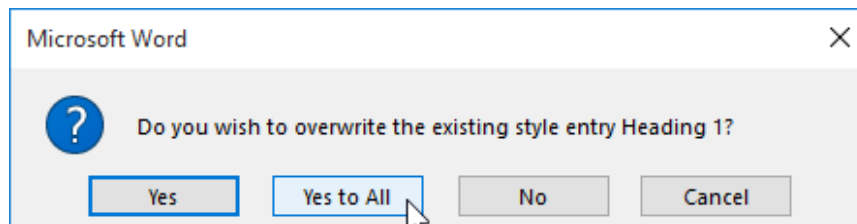
- Let's update the heading styles in this document. Hold the Ctrl key and click Heading 1, Heading 2, and Heading 3 in the list on the right-hand side to select all three entries from the Activity 7-2B file:



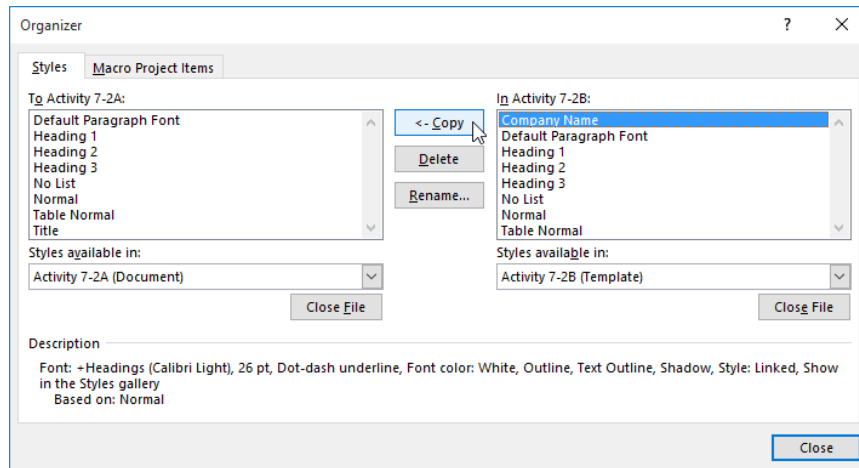
- Click Copy to transfer them to the Activity 7-2A file:



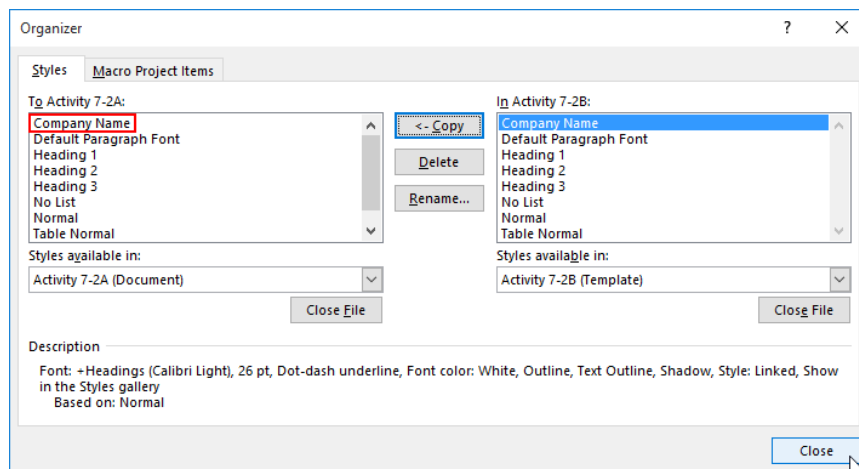
- When prompted to confirm the operation, click "Yes to All:"



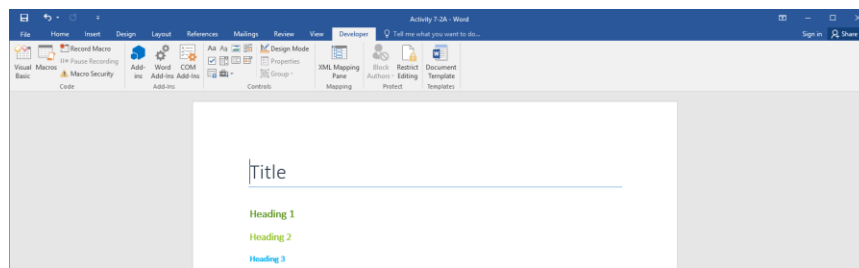
- 13. The styles will now be copied. Now, let's copy a unique style. Click to select the Company Name style from Activity 7-2B and click Copy:



- 14. The operation will complete without requiring confirmation since that style did not exist in the original document. Close the Organizer:

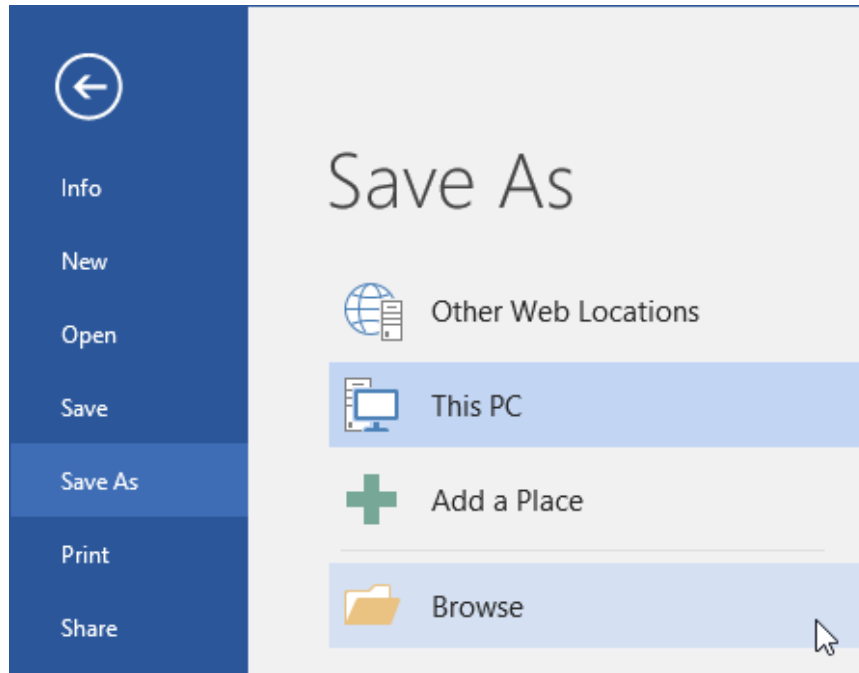


- 15. Check out the changes to the document:

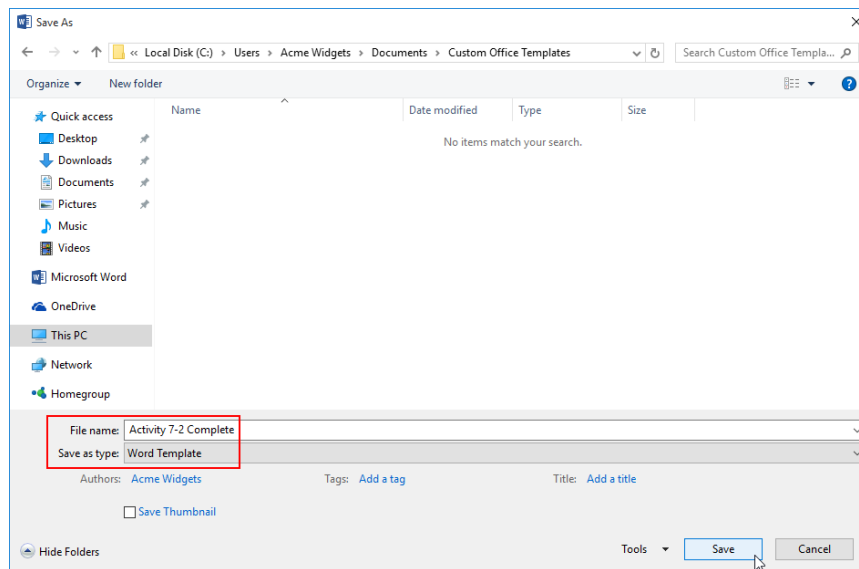


The three heading styles that we copied from the template have been updated, but the Title style has not been affected.

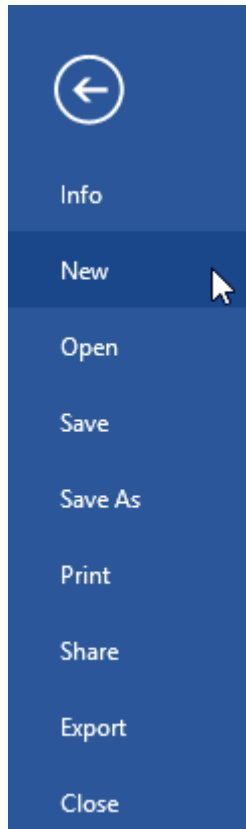
16. Now let's save this file as a template for future use. Click File → Save As → Browse:



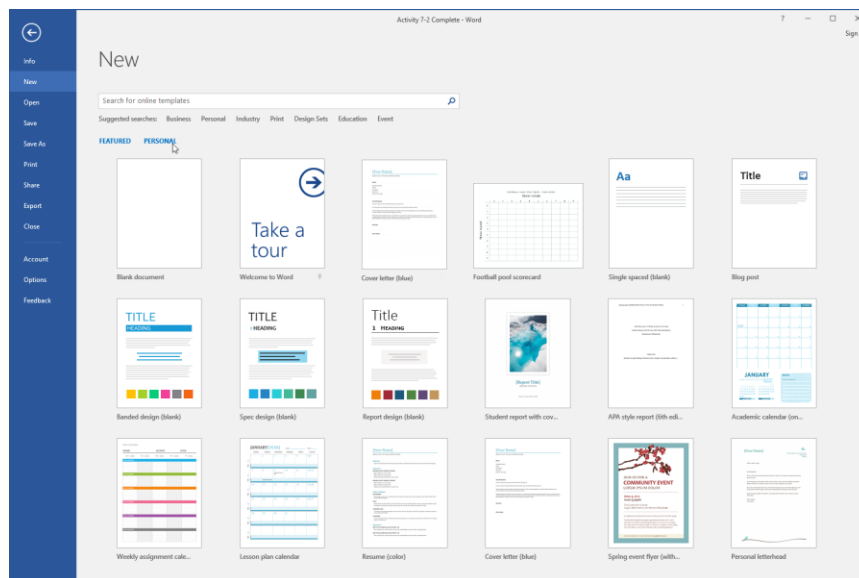
17. The Save As dialog will open. Change the file name to Activity 7-2 Complete. Choose Word Template as the file type and accept the default file location. Finally, click Save:



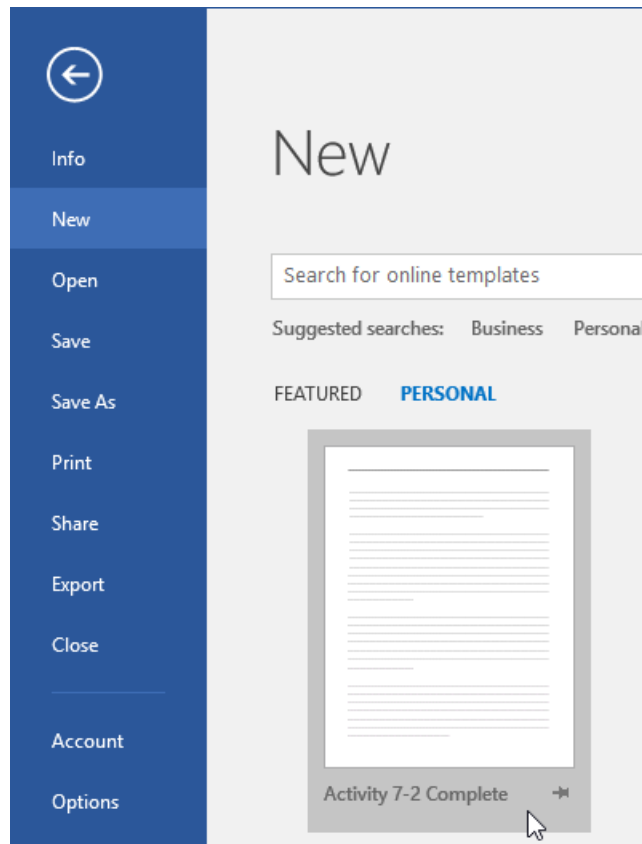
18. Let's make sure that our new template works. Click File → New:



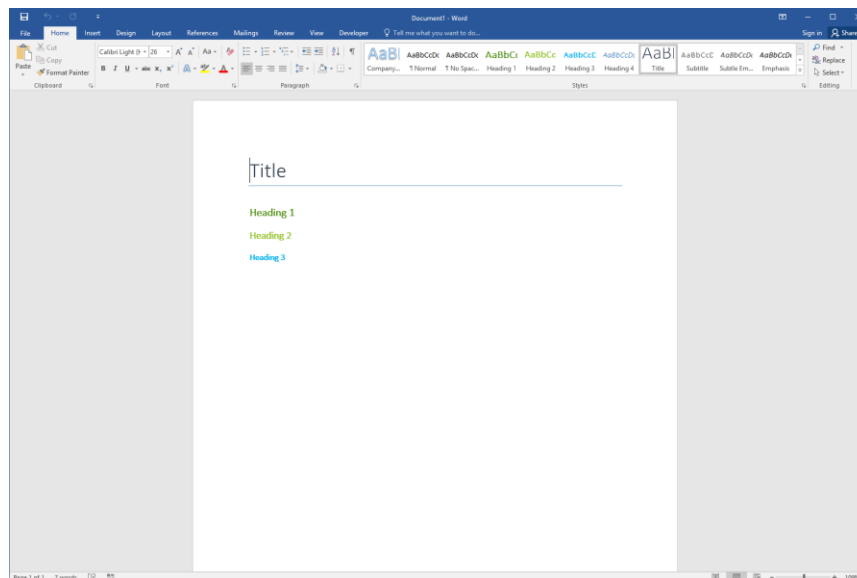
19. In the New category of Backstage view, click the Personal link:



20. You should see your template. Double-click it to create a new document from it:



21. The new document will open:



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

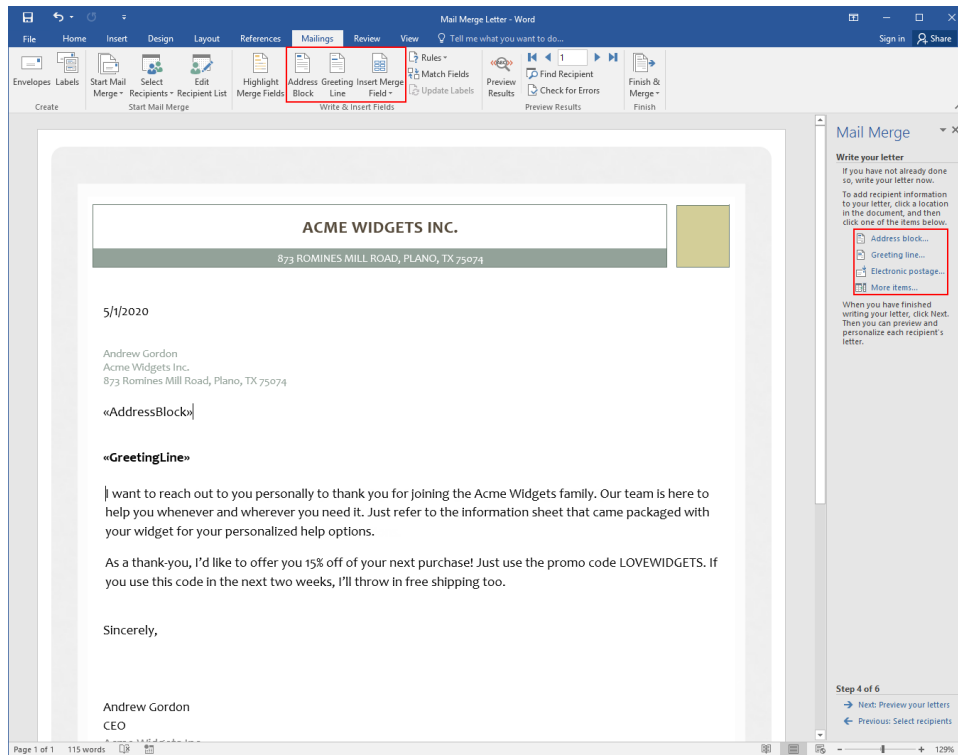
MAIL MERGE

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.

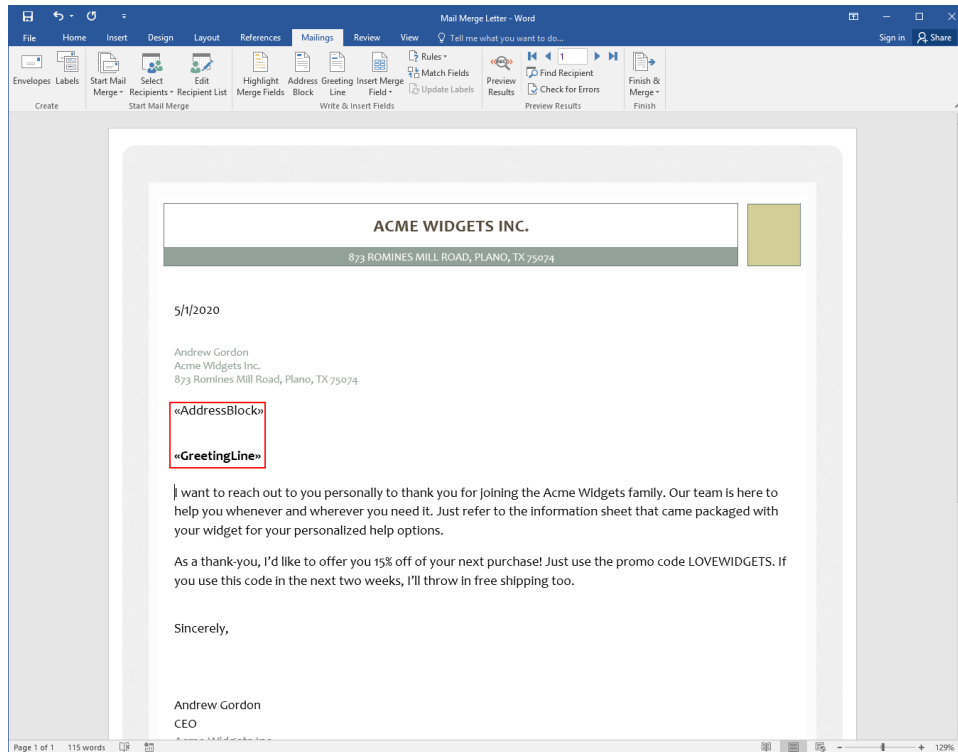
For example, let's say you want to send a quarterly newsletter summing up the events of the year to shareholders in your company. You can use mail merge to create the letter and then merge it with your address list so that each letter is addressed to the recipient.

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:



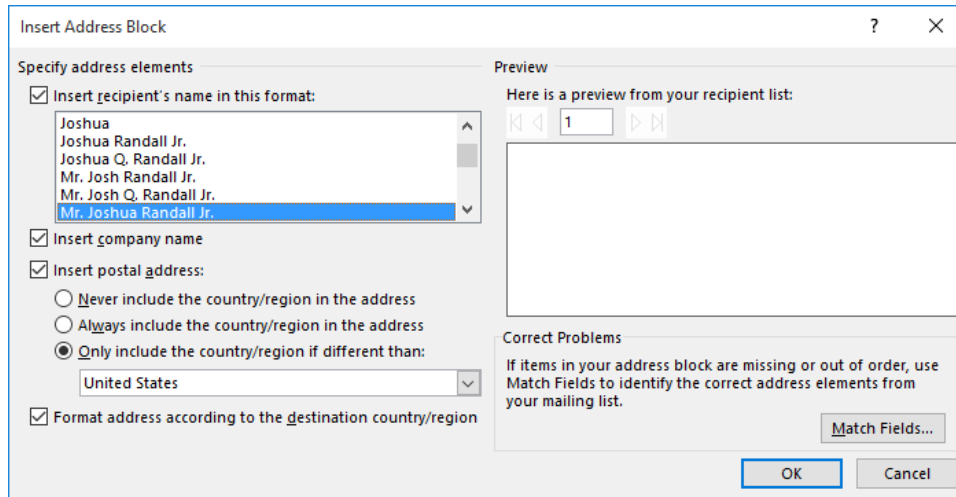
You can easily identify fields by the chevrons that appear around them:



Let's look at the four categories of merge fields shown in the Mail Merge Wizard above.

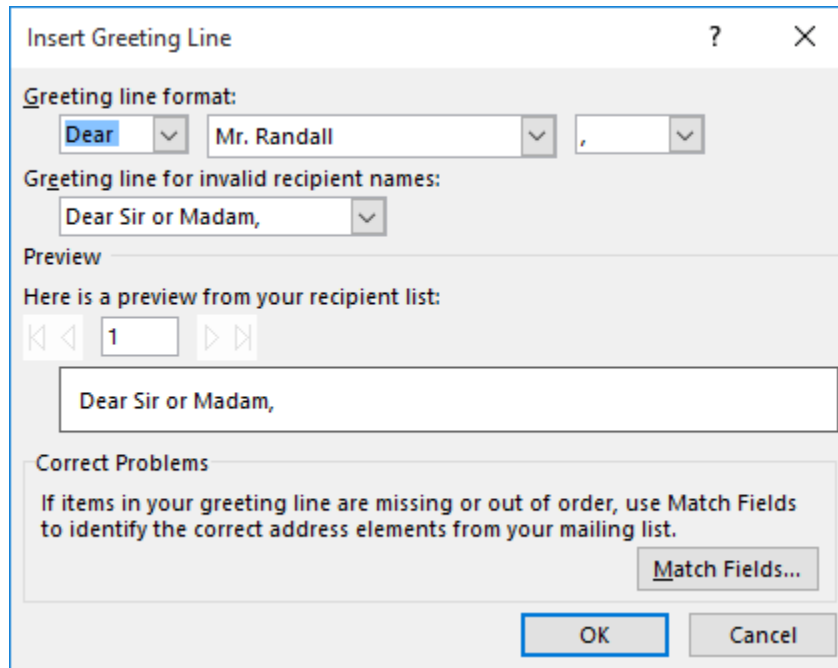
Address Block

This merge field marks where each person’s address will go. It can be customized to display whatever elements you like:



Greeting Line

This merge field allows you to customize how each recipient is addressed:



More Items

To see a full list of fields that you can insert, click Mailings → Insert Merge Field or click the “More items” link in Step 4 of the Mail Merge Wizard.

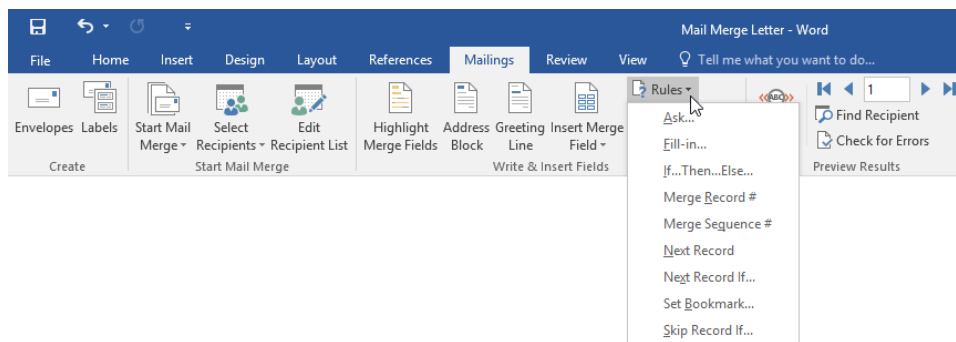
Electronic Postage

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 → 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

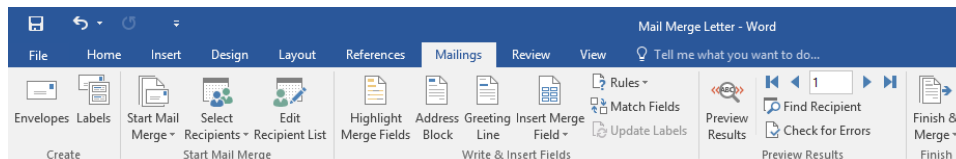
The mail merge process has five main steps:

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:



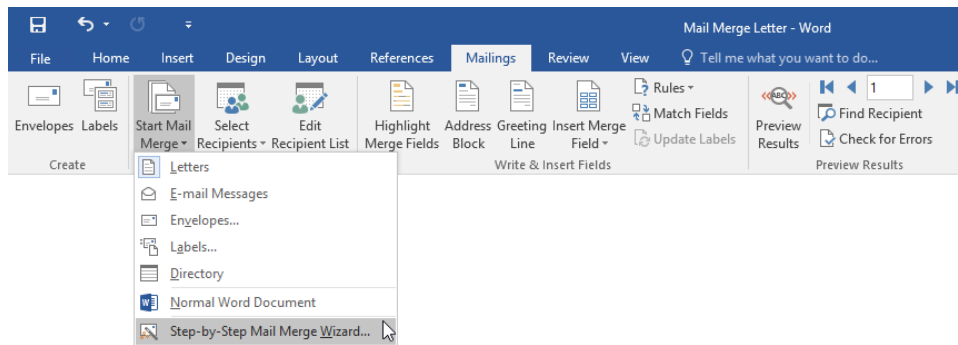
Let's go over its groups.

- **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.

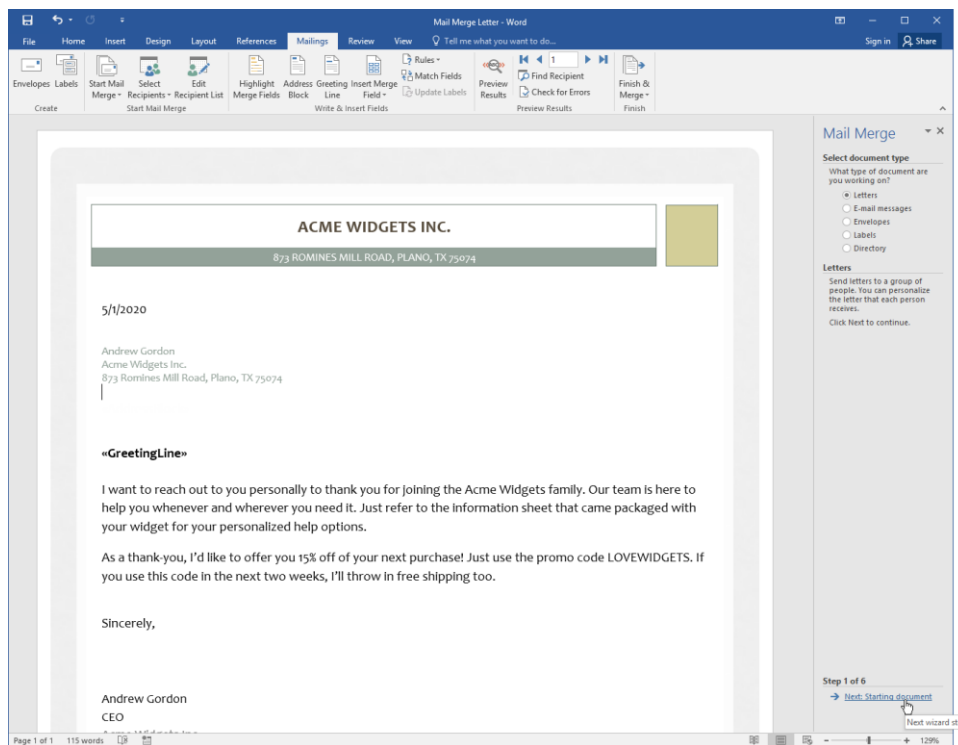
THE MAIL MERGE WIZARD AND RELATED DIALOG BOXES

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 → Start Mail Merge → Step-by-Step Mail Merge Wizard:

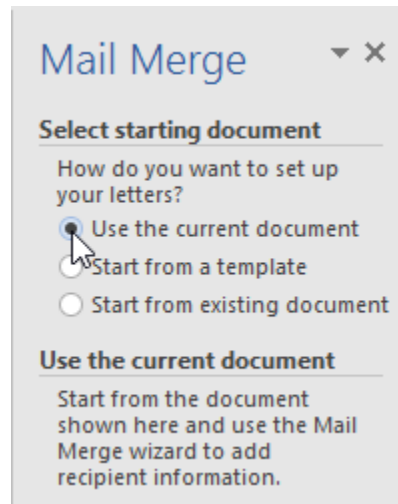


The Mail Merge Wizard will open as a task pane on the right-hand side of your screen. Your first step is to **choose a document type**. When you're ready, click Next:



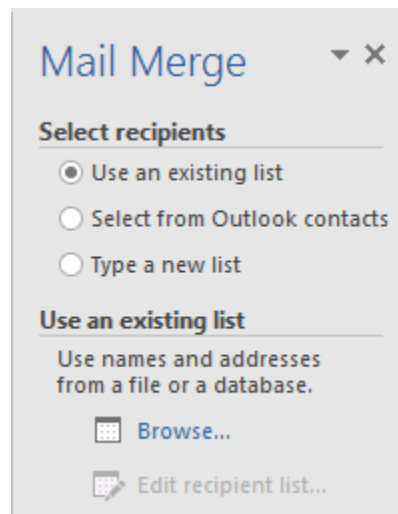
For this example, we'll stick with letters. The remaining steps may differ slightly depending on the type of document you're creating, but the basic concept remains the same.

Once you click Next, you will be able to **choose what document you want to use** for the mail merge:

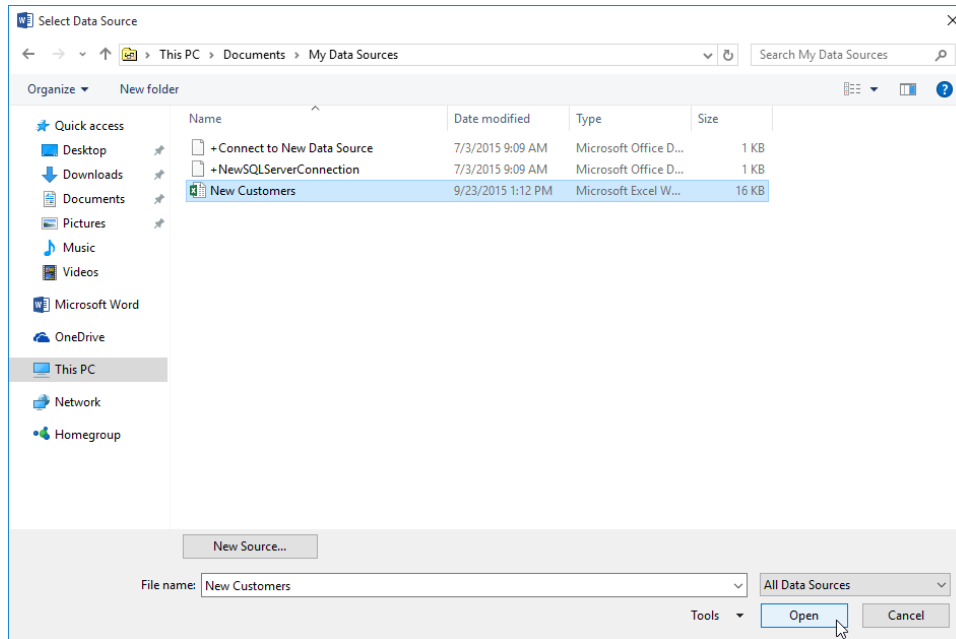


In this case, we've already created a letter, so we'll choose the current document. (Note that you can also use a template or an existing document, meaning a document that you've created but isn't open.) Once you've chosen the document, click Next.

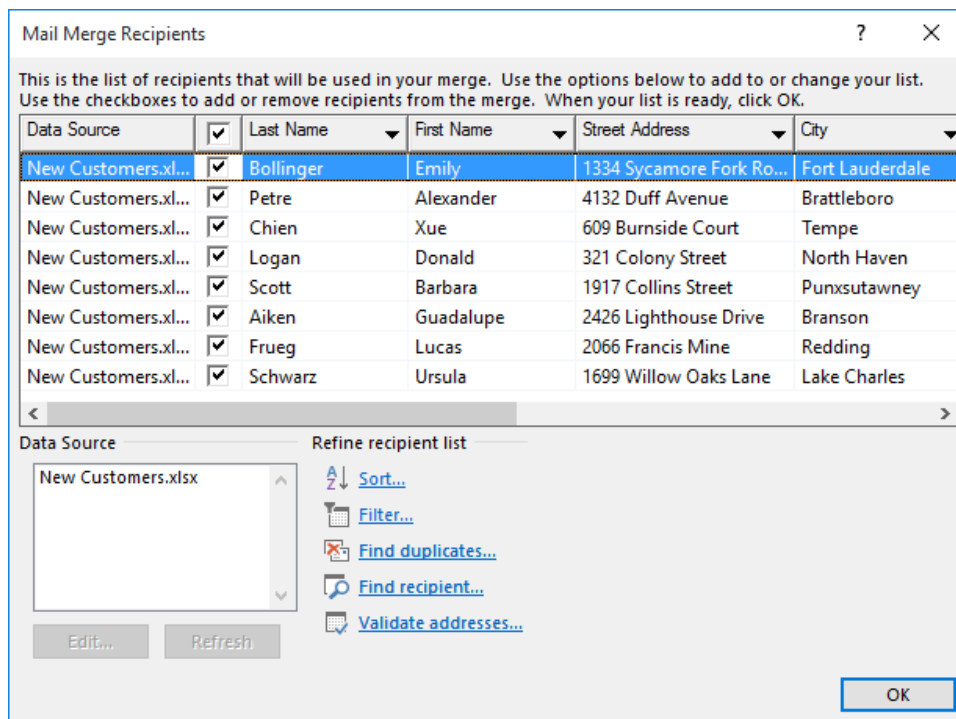
The third step of the Mail Merge Wizard prompts you to **choose the recipients** of the merge. Depending on the option you select, the commands in the bottom part of the task pane will be different. The options for using an existing list are shown in this example:



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:

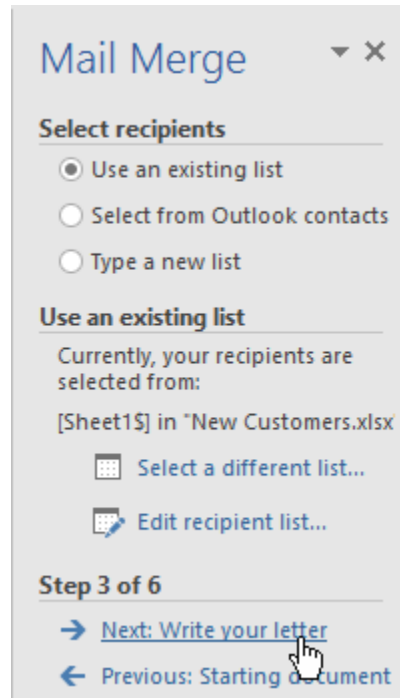


Depending on the data source type, you may also be prompted to select a particular range of the file. Once this step is complete, you will see the Mail Merge Recipients dialog box:

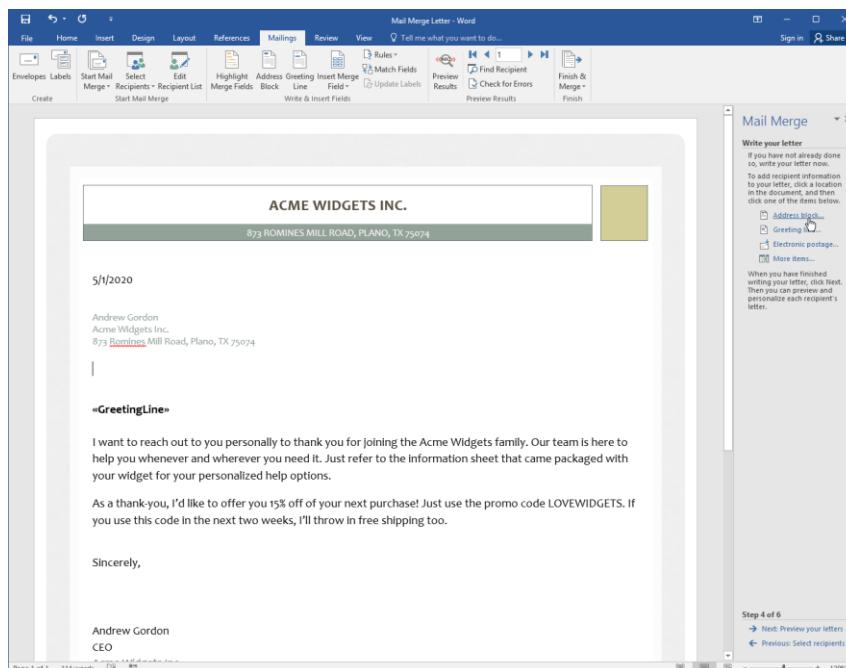


Simply check a record to include it or uncheck a record to exclude it from the merge.

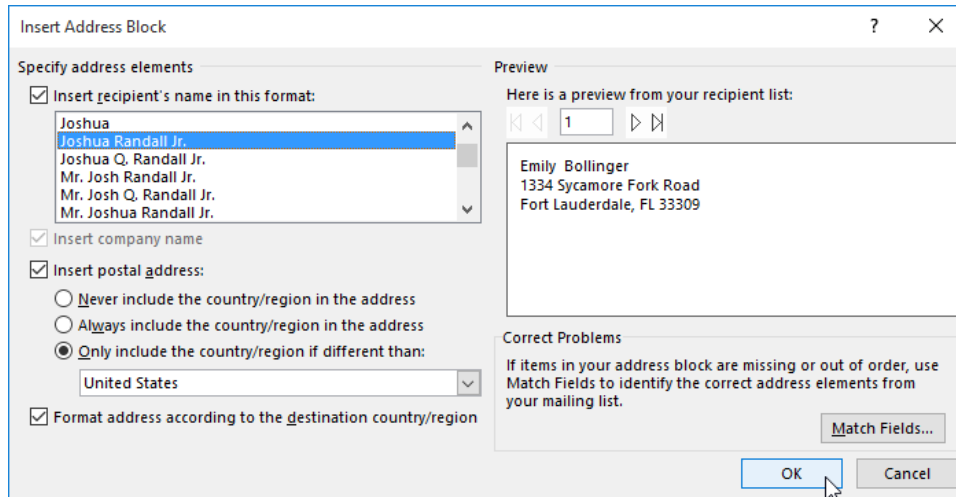
After you click OK, the Mail Merge Recipients dialog will close. Click Next in the task pane to proceed to the next step:



Now you can **write your document** and **insert the merge fields**. Let's add the "Address block" merge field:



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:



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:

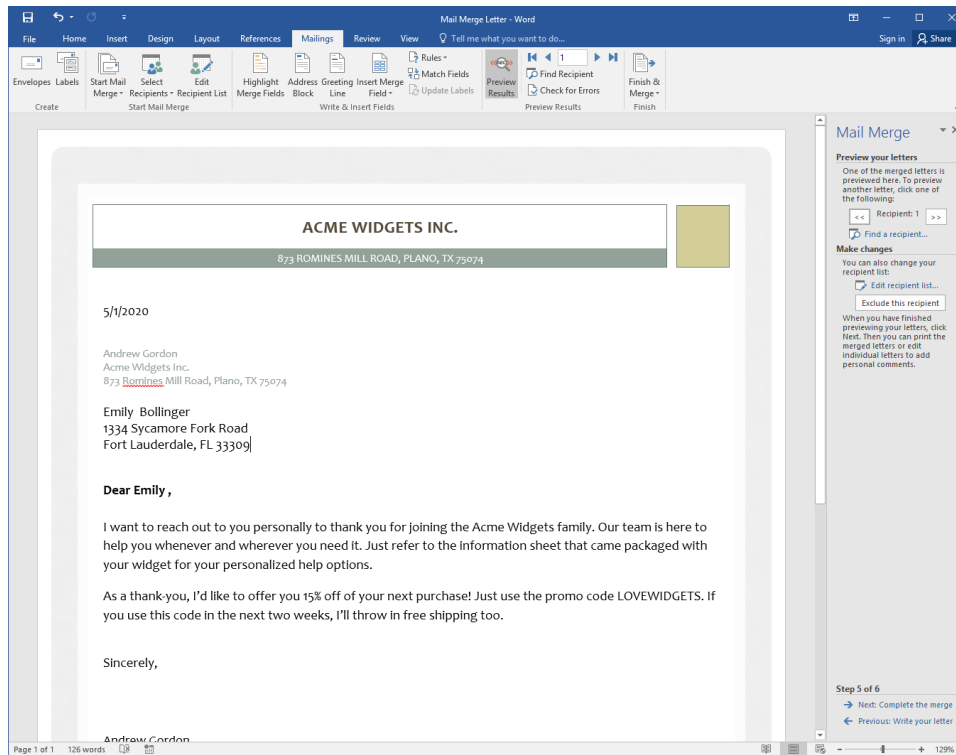
Andrew Gordon
Acme Widgets Inc.
873 Romines Mill Road, Plano, TX 75074

«AddressBlock»

«GreetingLine»

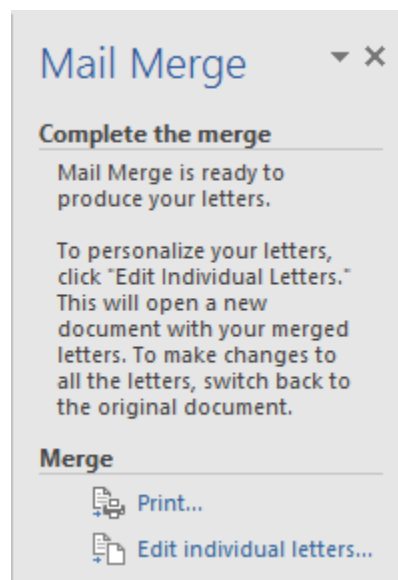
I want to reach out to you personally to thank you for joining the Acme Widgets family. Our team is here to help you whenever and wherever you need it. Just refer to the information sheet that came packaged with your widget for your personalized help options.

Once your fields are in place, click Next. This step will show you a **preview** of your document. You can use the arrow buttons in the task pane to scroll through the recipients:

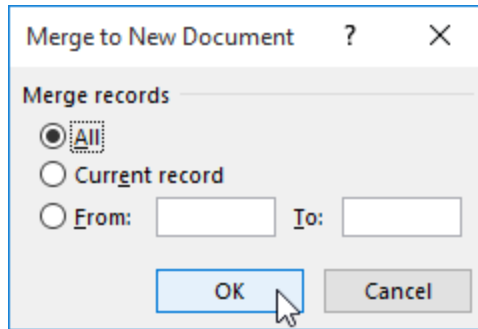


If you need to make any changes to the recipients, click the “Edit recipient list” link in the Mail Merge Wizard. You can also click the Previous link in the task pane to go back to any step and make changes. When you are satisfied with the result, click Next to proceed to Step 6.

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:

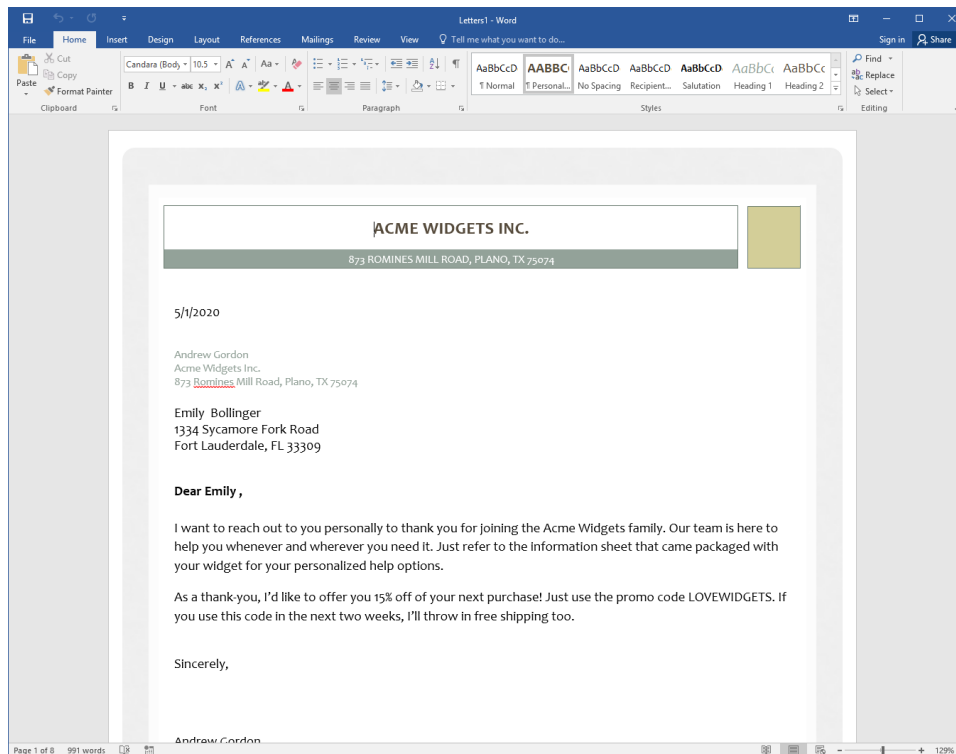


Click OK to confirm the operation:



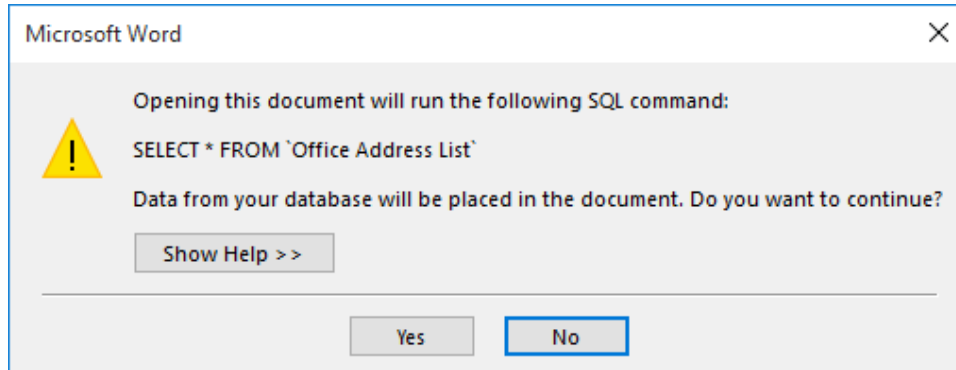
The merge will always be performed to a new document so that you can still make changes to the original letter and re-merge them.

Here is our finished file:



OPENING A MAIL MERGE DOCUMENT WITH A DATA SOURCE ATTACHED

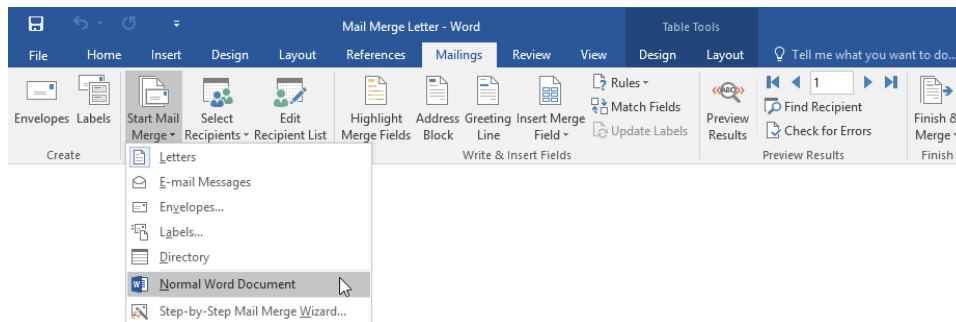
When you open a mail merge document that has a data source attached, you will see a security warning like the following:



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 → Start Mail Merge → Normal Word Document:



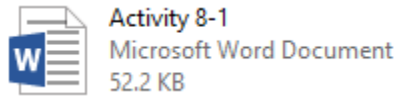
The document will now be returned to a normal file and the data source will be unlinked.

ACTIVITY 8-1

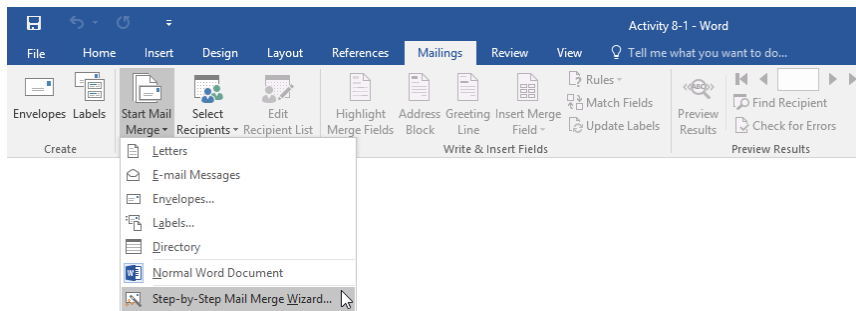
Performing a Mail Merge

In this exercise you will perform a mail merge from start to finish.

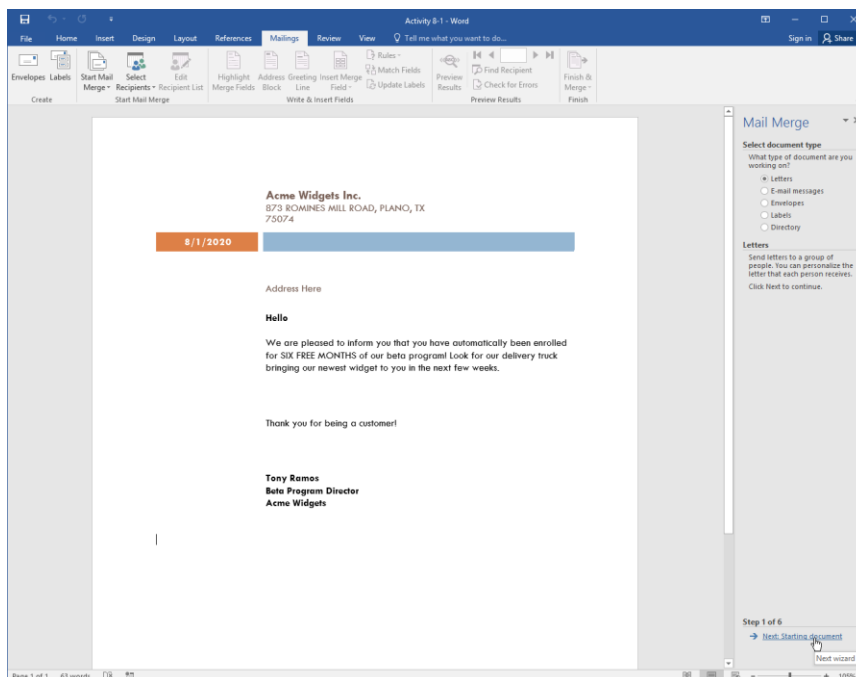
1. To begin, open Microsoft Word 2016 and open Activity 8-1:



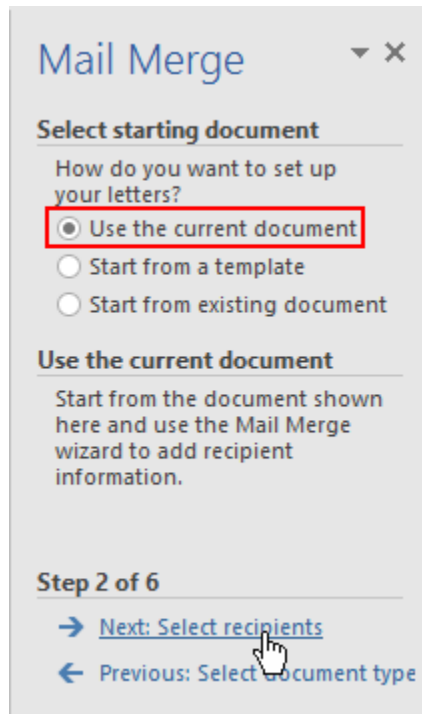
2. Click Mailings → Start Mail Merge → Step-by-Step Mail Merge Wizard:



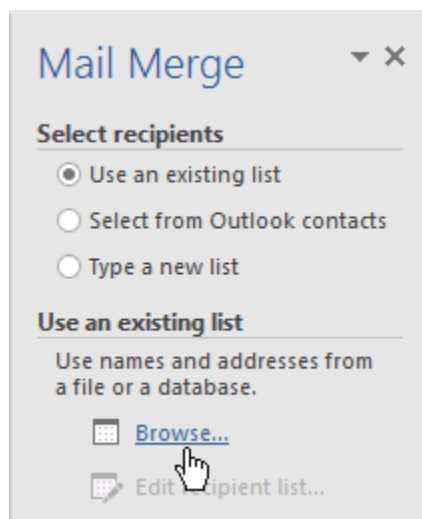
3. The Mail Merge pane will appear on the right-hand side of the Microsoft Word window. Click the Letters radio button and then click Next at the bottom of the pane:



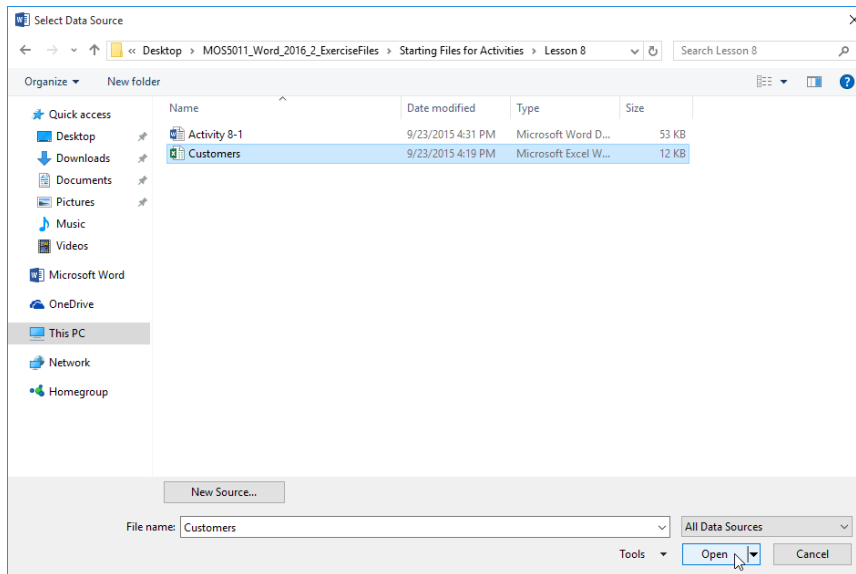
4. In Step 2, ensure that the “Use the current document” radio button is selected. Then, click Next:



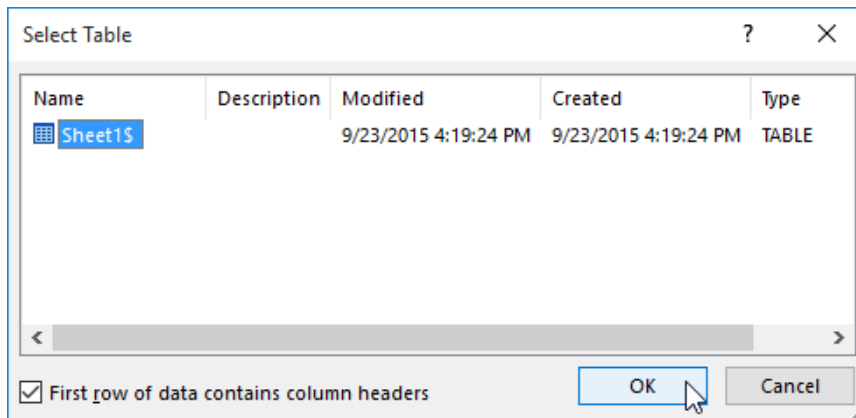
5. In Step 3, ensure that the “Use an existing list” radio button is selected. Click Browse:



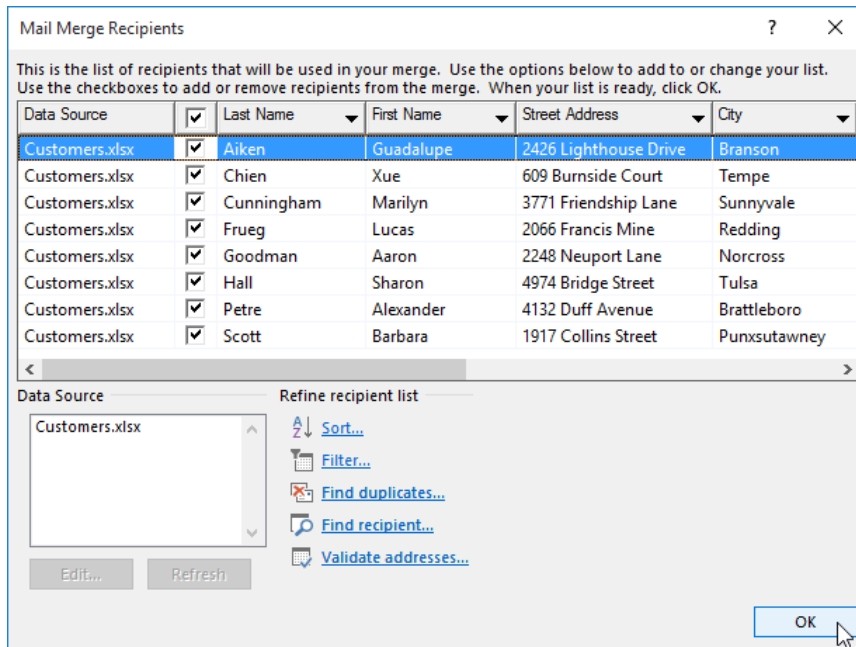
6. Browse to the Lesson 8 folder of your Exercise Files. Select the Customers spreadsheet and click Open:



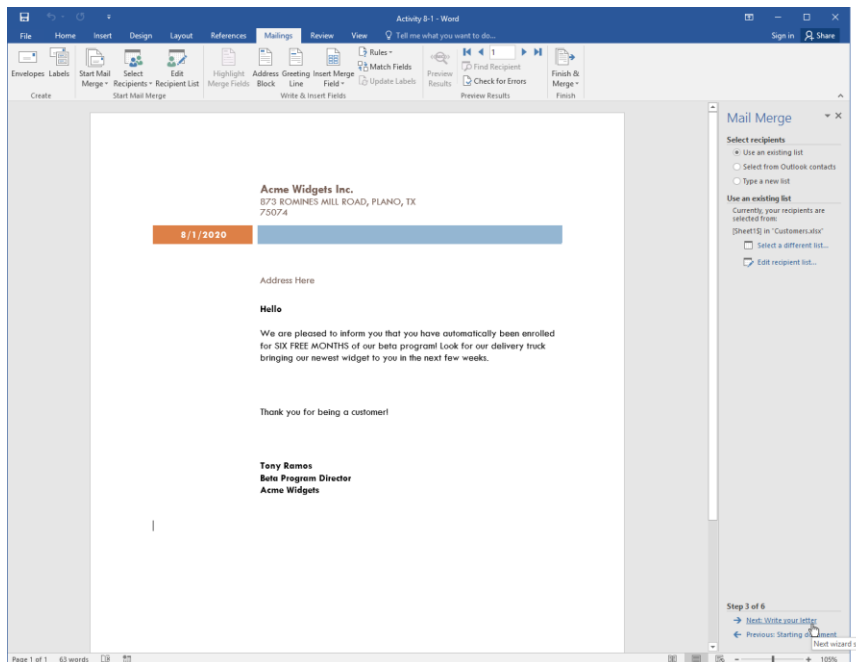
7. The Select Table dialog box will open. Click OK to use the selected sheet:



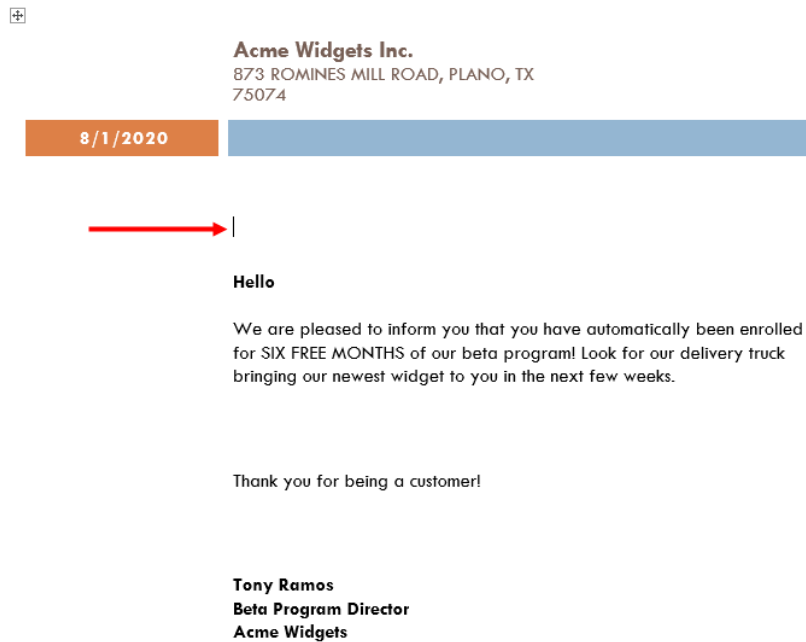
- The Mail Merge Recipients dialog will open and show the data contained within the spreadsheet. Make sure that all of the records are checked and click OK:



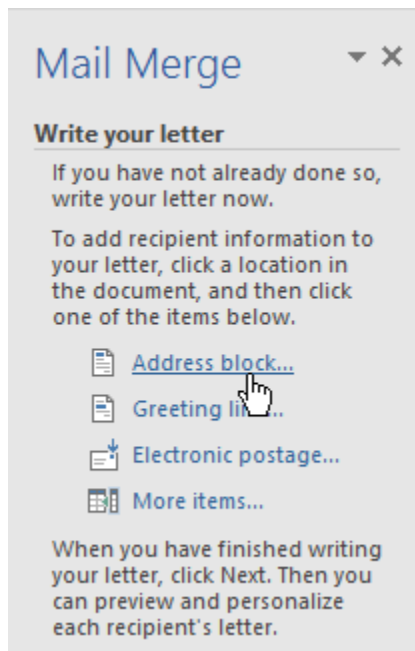
- Click Next in the Mail Merge task pane to advance to the next step:



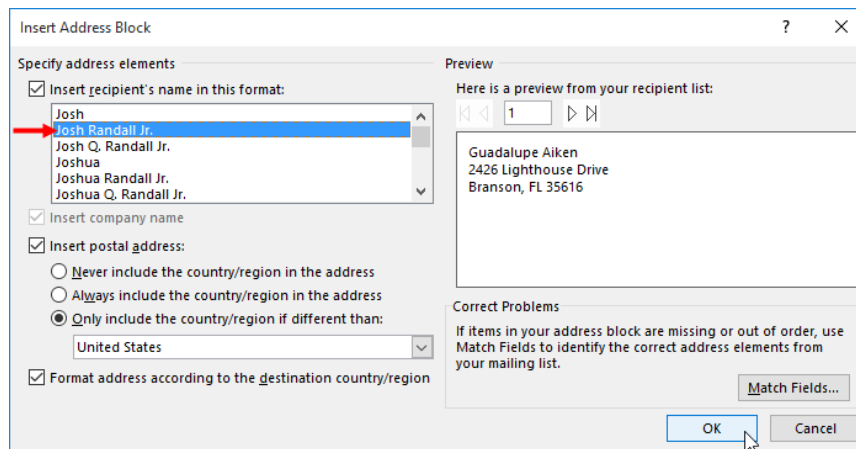
10. Select the “Address Here” text and delete it. Your cursor should be in the position shown below:



11. Click the “Address block” link in the Mail Merge Wizard:



- When the Insert Address Block dialog appears, choose the second salutation from the first list on the left-hand side. Click OK to continue:



- The field will now be inserted:

+

Acme Widgets Inc.
873 ROMINES MILL ROAD, PLANO, TX
75074

8 / 1 / 2020

«AddressBlock»

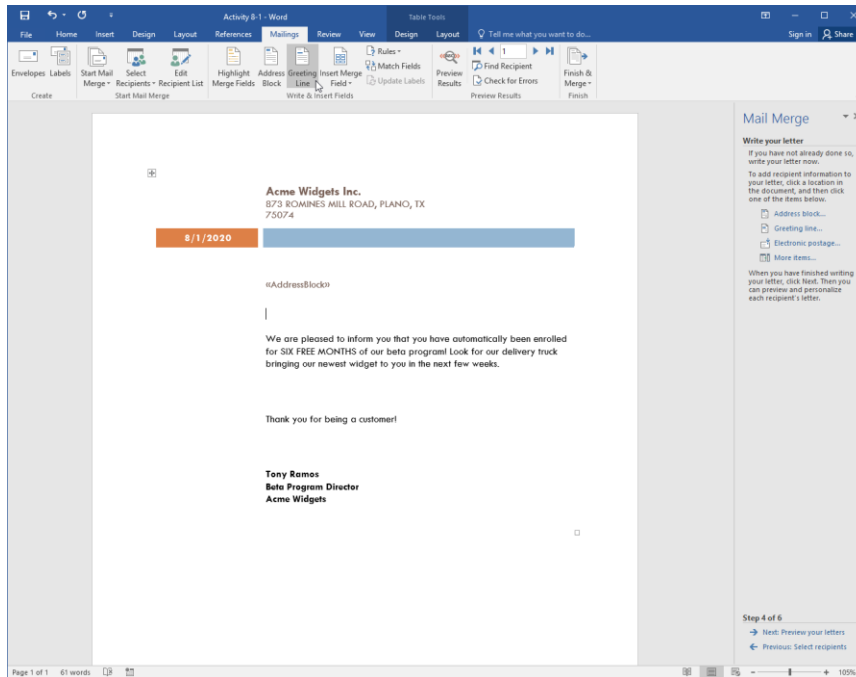
Hello

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.

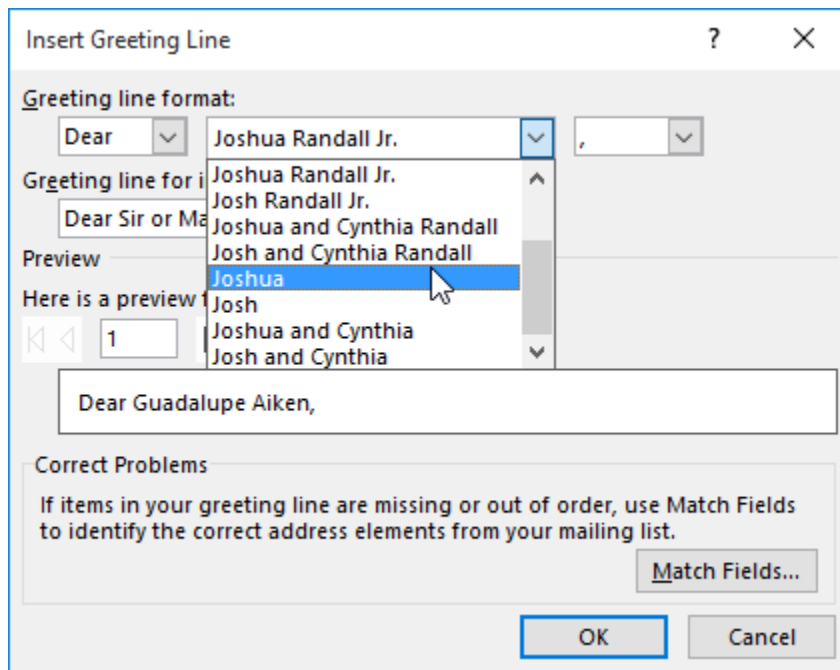
Thank you for being a customer!

Tony Ramos
Beta Program Director
Acme Widgets

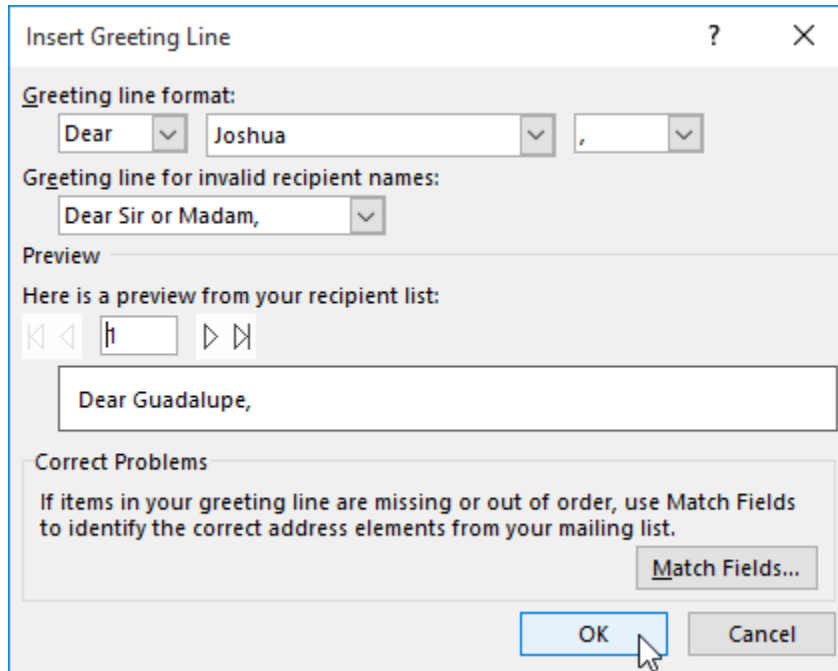
- 14. Delete the “Hello” text, leaving your cursor on that line. Click Mailings → Greeting Line:



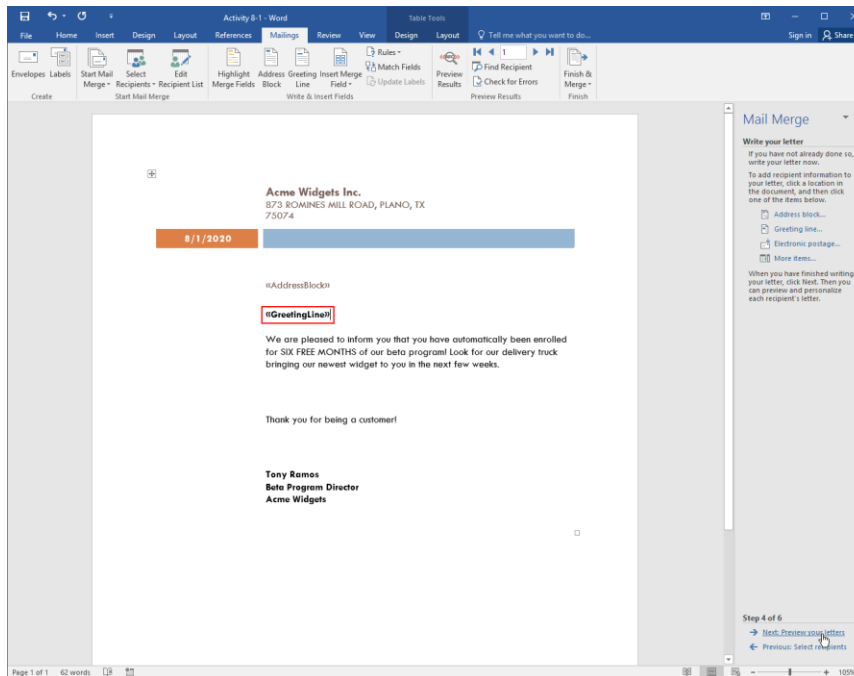
- 15. The Insert Greeting Line dialog box will open. Click the middle menu in the top row and choose “Joshua:”



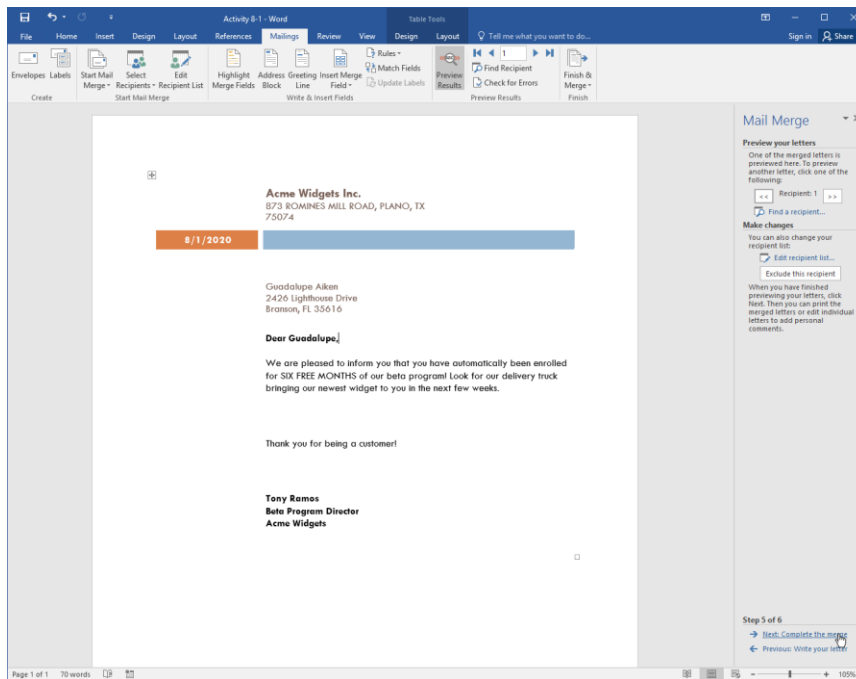
16. Click OK:



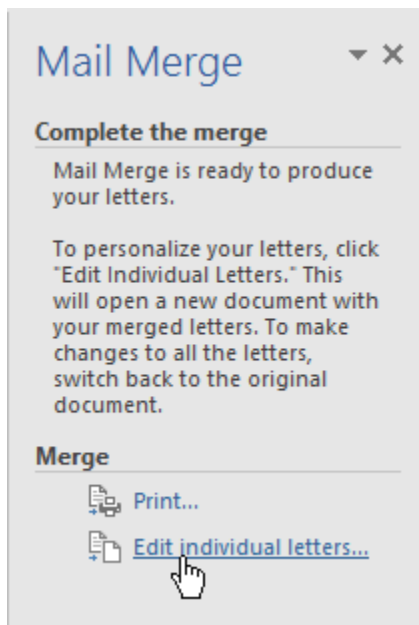
17. The field will now be inserted. Click Next to advance in the Mail Merge Wizard:



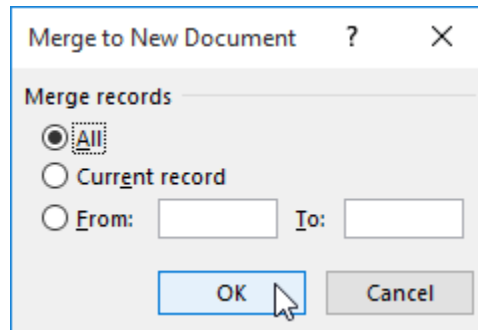
18. Now, a preview of your letter will be shown. Make sure that everything is correct. (If you need to change anything, click the Previous link at the bottom of the task pane.) When you are satisfied, click Next:



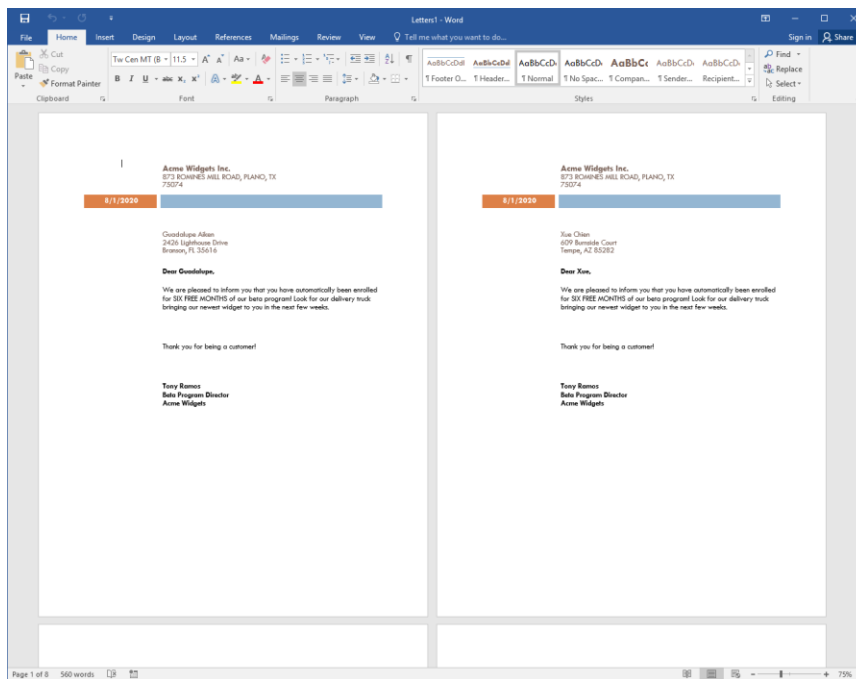
19. Click “Edit individual letters” in the Mail Merge Wizard:



20. You will be prompted to select what records to merge. Leave the All radio button selected and click OK:



21. This will create a new document with a letter for each person on each page:



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.

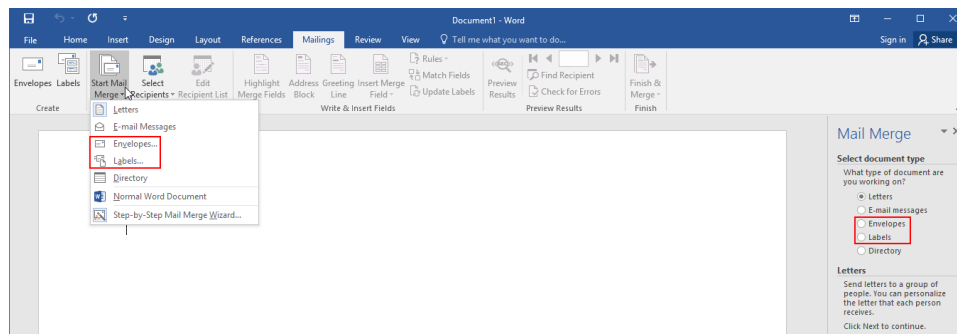
Topic Objectives

In this topic, you will learn:

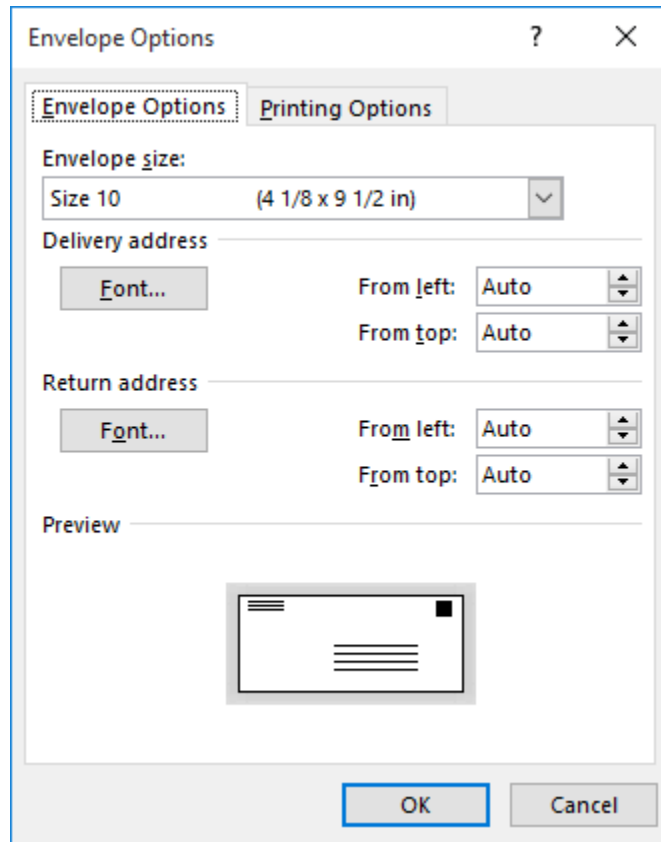
- About merge options for envelopes and labels
- How to create a single envelope or label
- How to set up your return address

MERGE OPTIONS FOR ENVELOPES AND LABELS

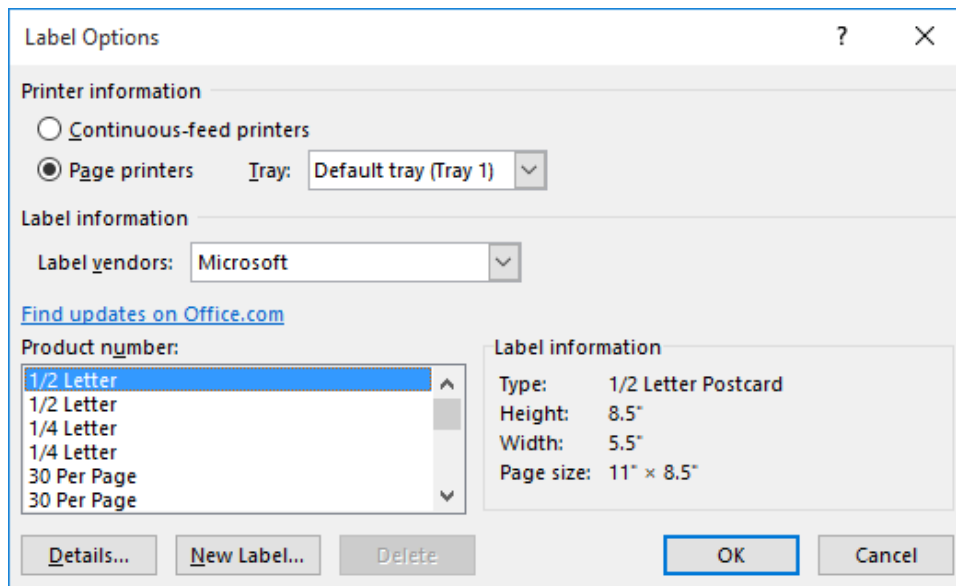
You can perform a mail merge for envelopes or labels by choosing that option from the Start Mail Merge menu on the Mailings tab or in the first step of the Mail Merge Wizard:



With either choice, you will be prompted to choose how your labels or envelopes are set up. Here are the options for envelopes:

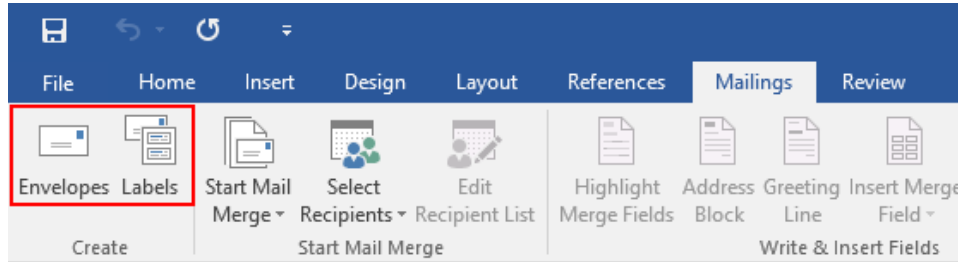


And here are the options for labels:

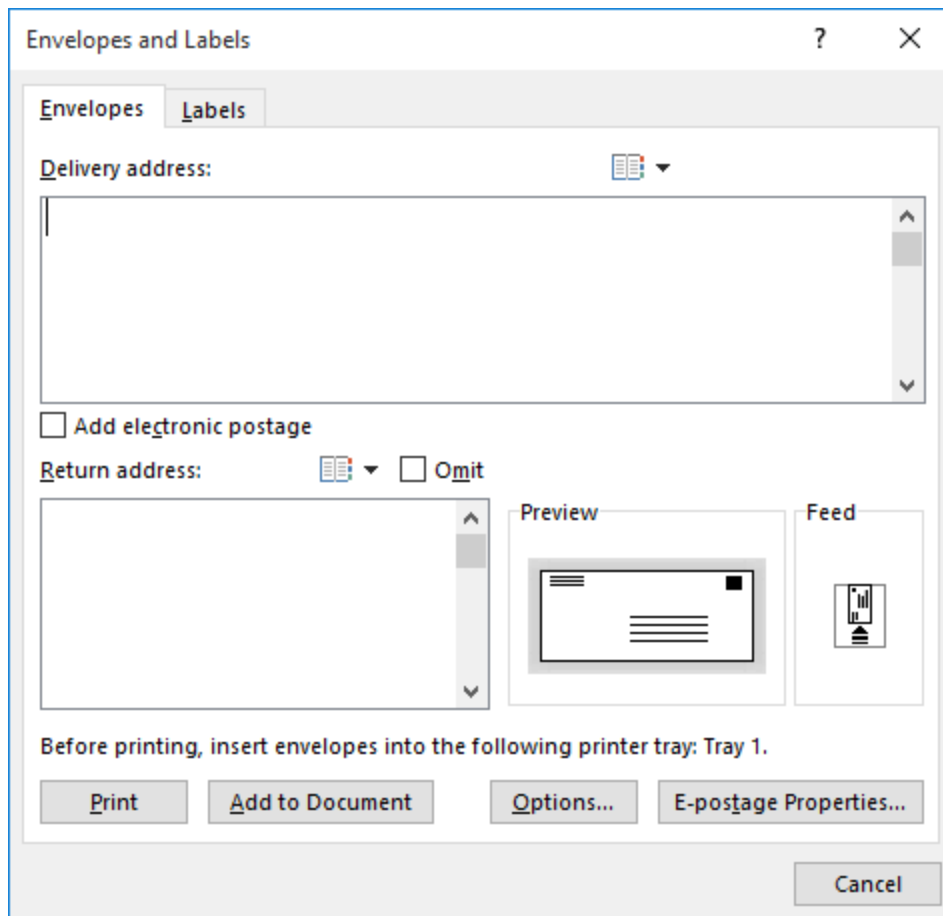


CREATING A SINGLE ENVELOPE OR LABEL

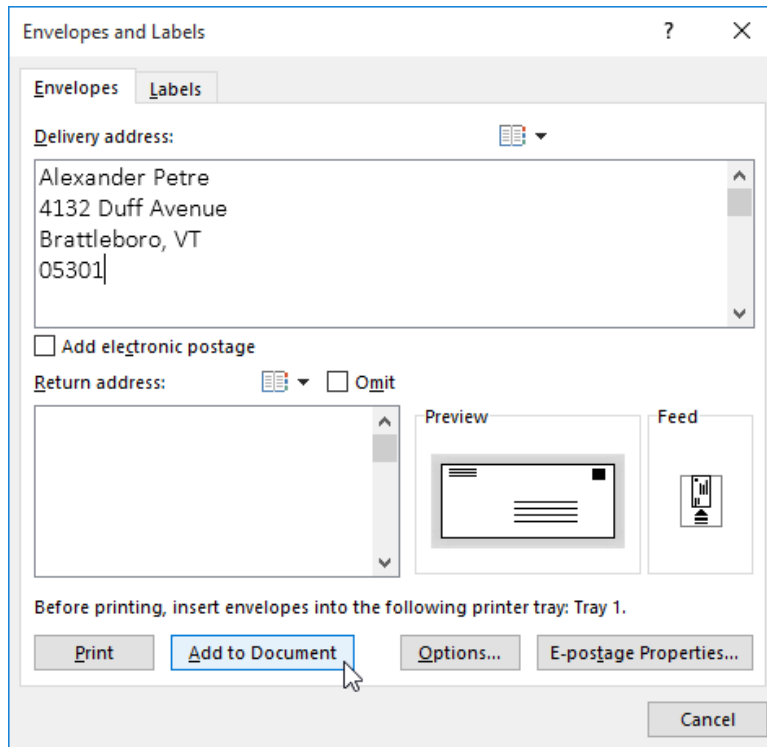
To create just a single envelope or label, click the appropriate command on the Mailings tab:



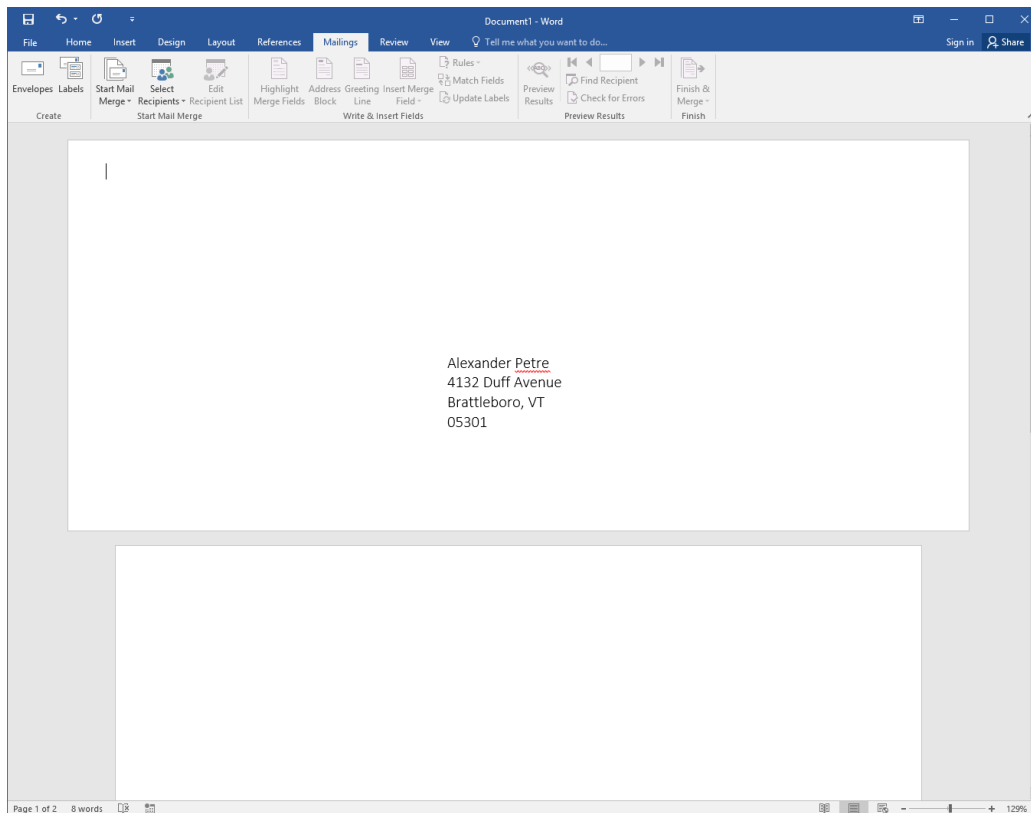
With either command, you will see the Envelopes and Labels dialog box. If you choose to create an envelope, the Envelopes tab will be displayed. It contains text boxes where you can enter the delivery and return address, as well as some additional options:



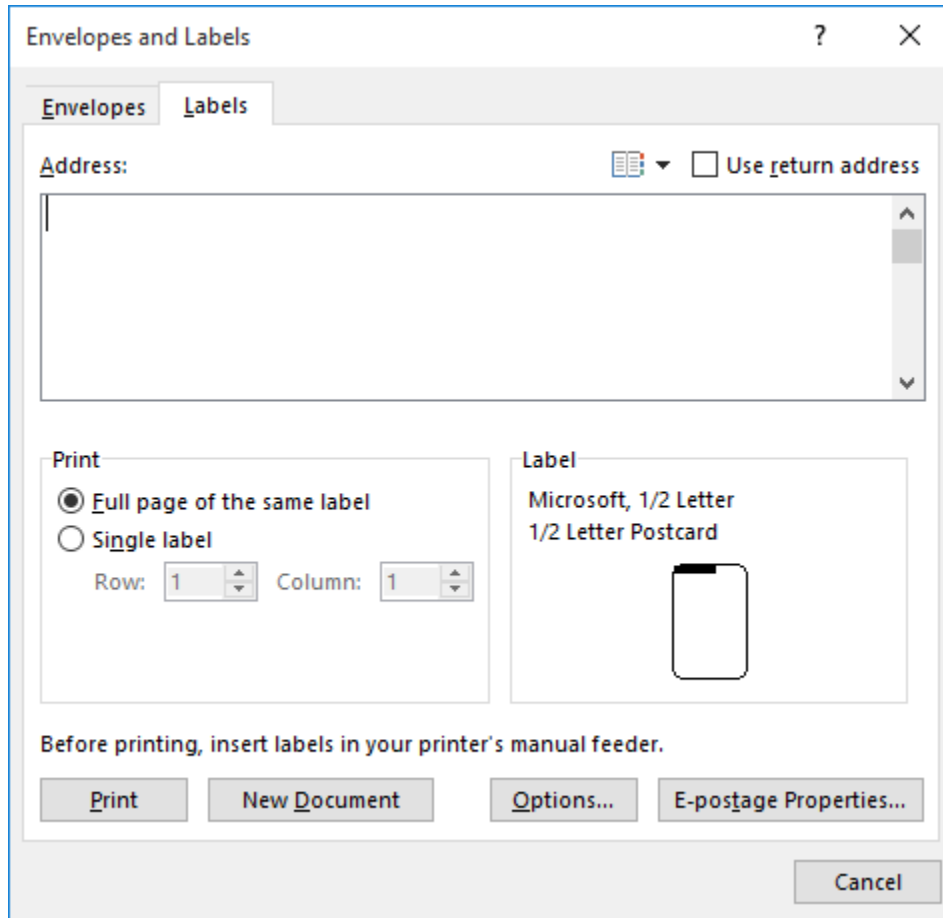
Once your options are set, click “Add to Document:”



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:

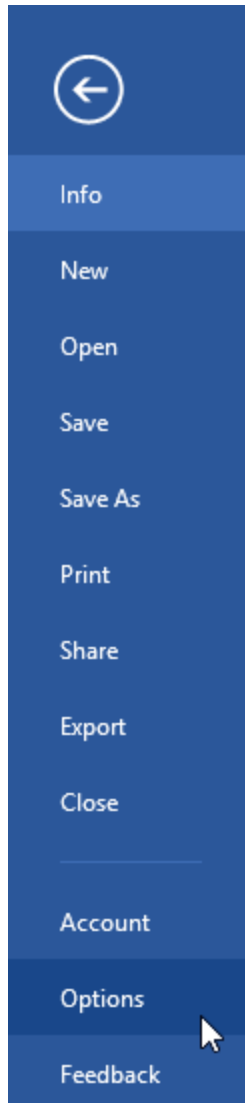


When you are ready, you can add the label to a new document or send it right to the printer.

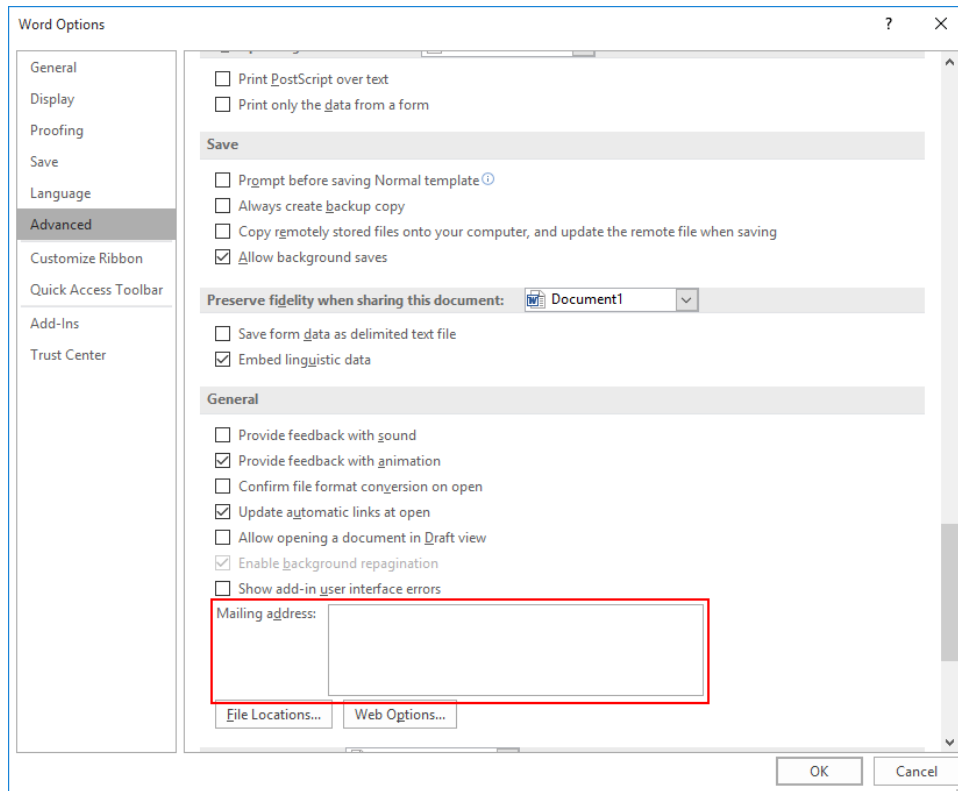
SET UP A RETURN ADDRESS

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.

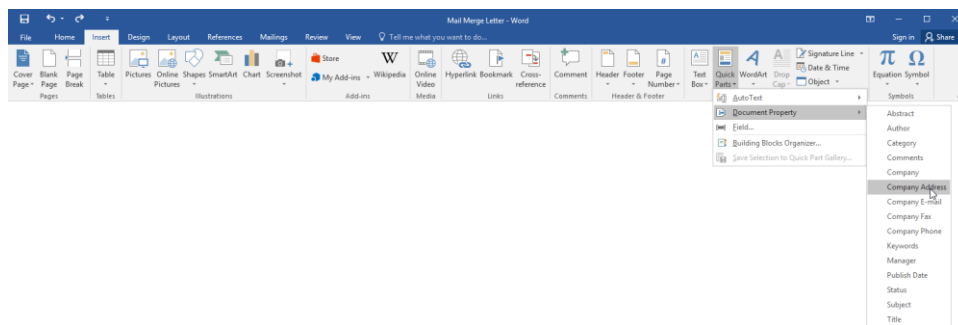
To open this dialog, click File → Options:



Now, click the Advanced category. Scroll to the bottom of this category and you will see the appropriate field:



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 → Quick Parts → Document Property → Company Address:

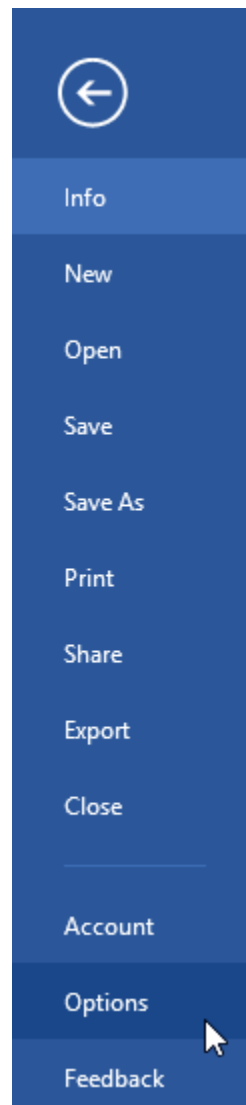


ACTIVITY 8-2

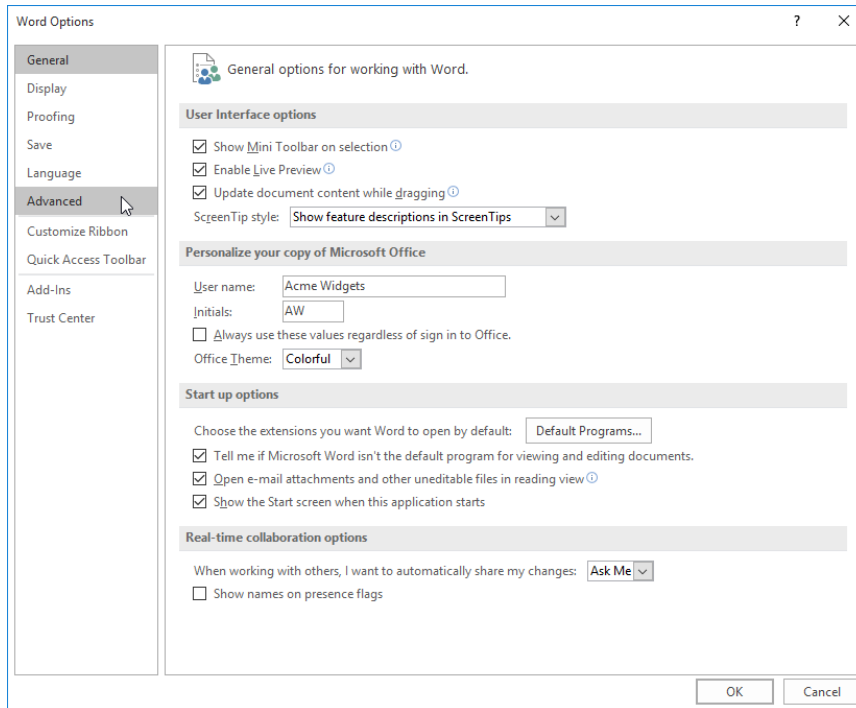
Merging Envelopes and Labels

In this activity, you will create envelopes for the letters that we created in the last activity.

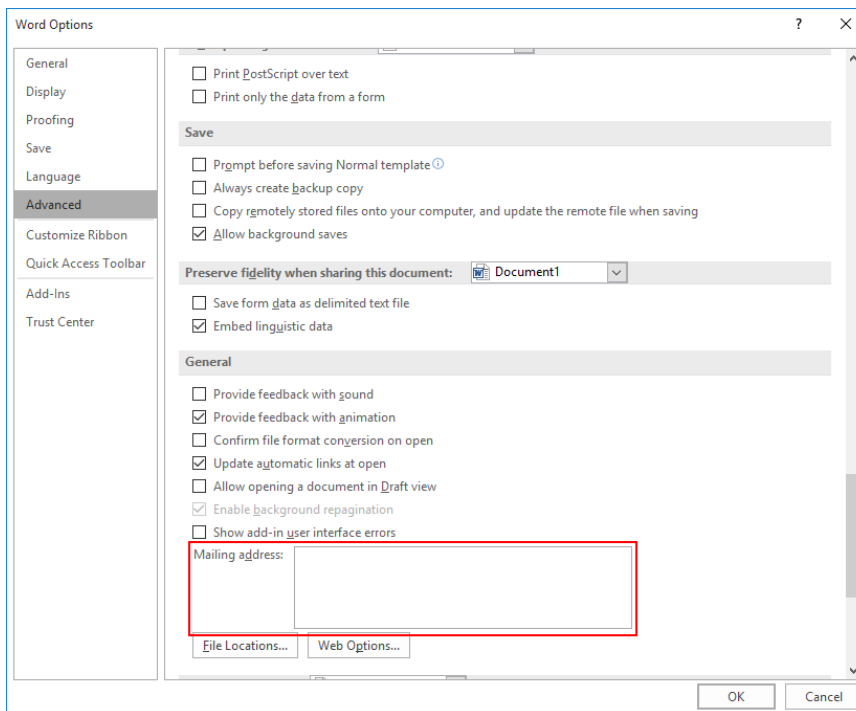
1. To begin, open Microsoft Word 2016 to a blank document.
2. First, let's set up our return address. Click File → Options:



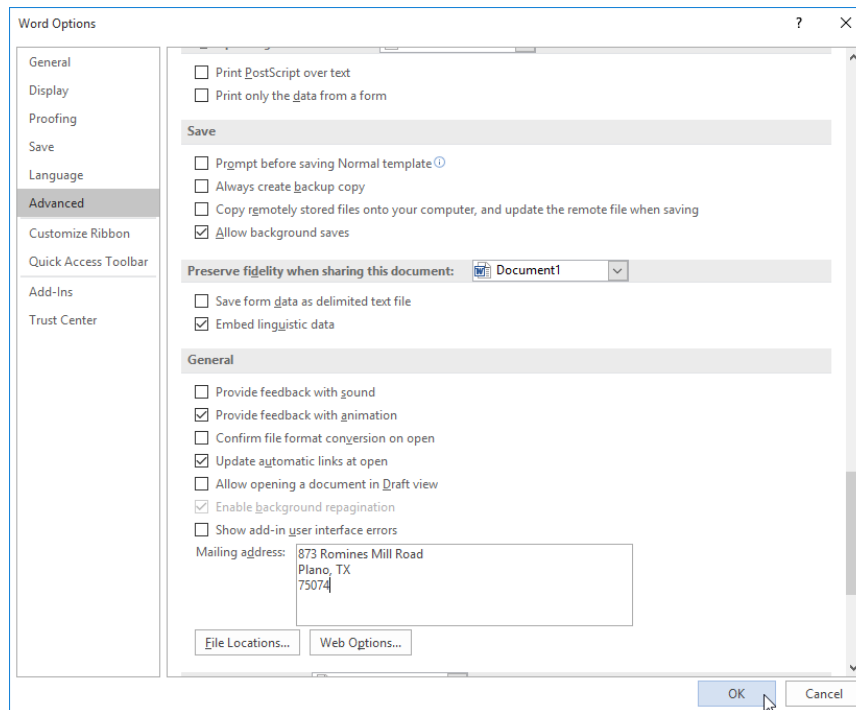
3. Click the Advanced category of the Word Options dialog box:



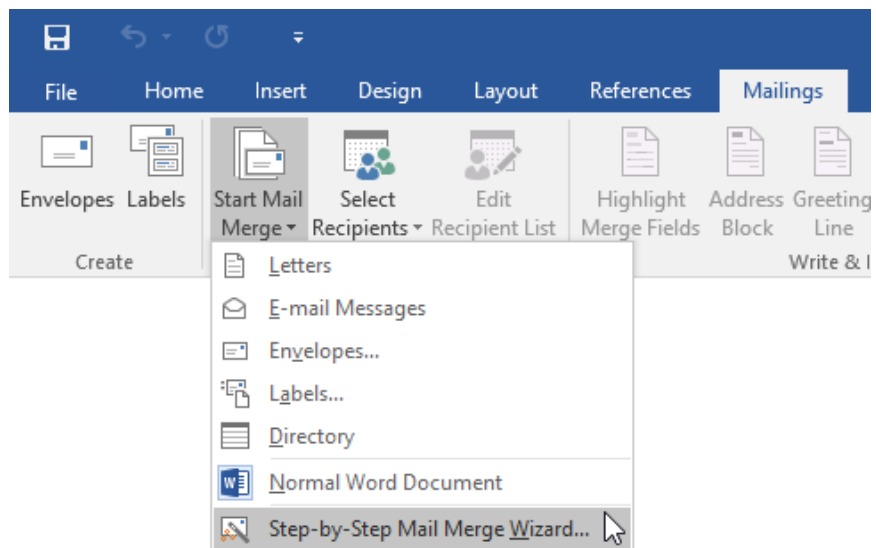
4. Scroll to the bottom of the options in this category and click to place your cursor in the “Mailing address” field:



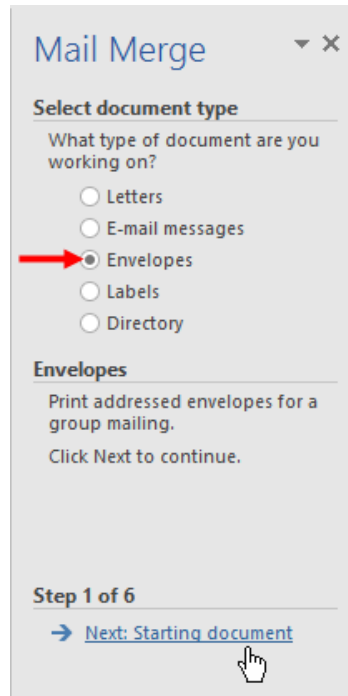
5. Enter the address as shown below and click OK:



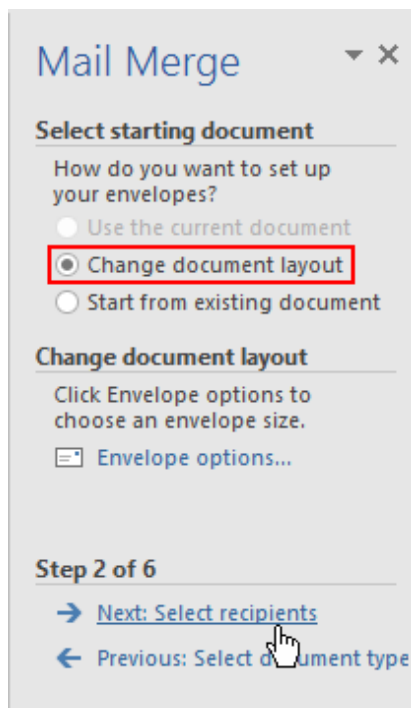
6. Now, let's do an envelope mail merge. Click Mailings → Start Mail Merge → Step-by-Step Mail Merge Wizard:



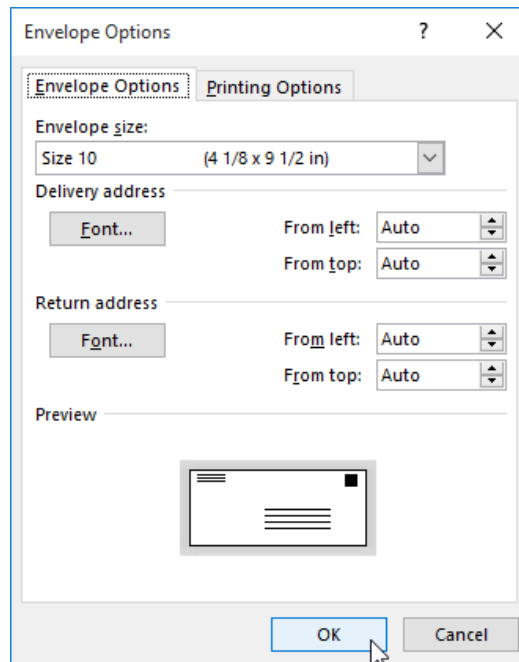
7. In the first step of the wizard, select Envelopes as the document type and click Next:



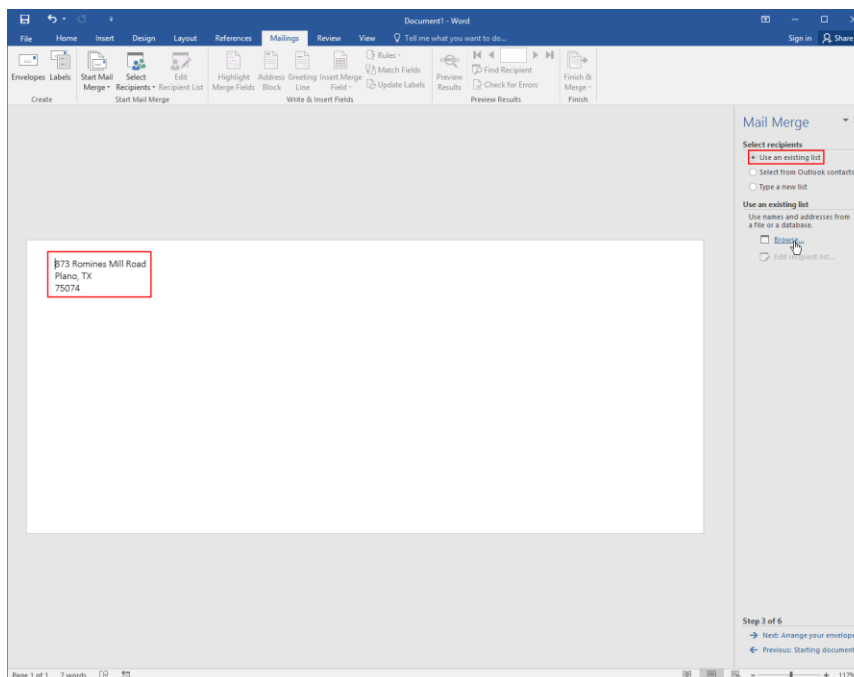
8. Choose to change the current document's layout and click Next:



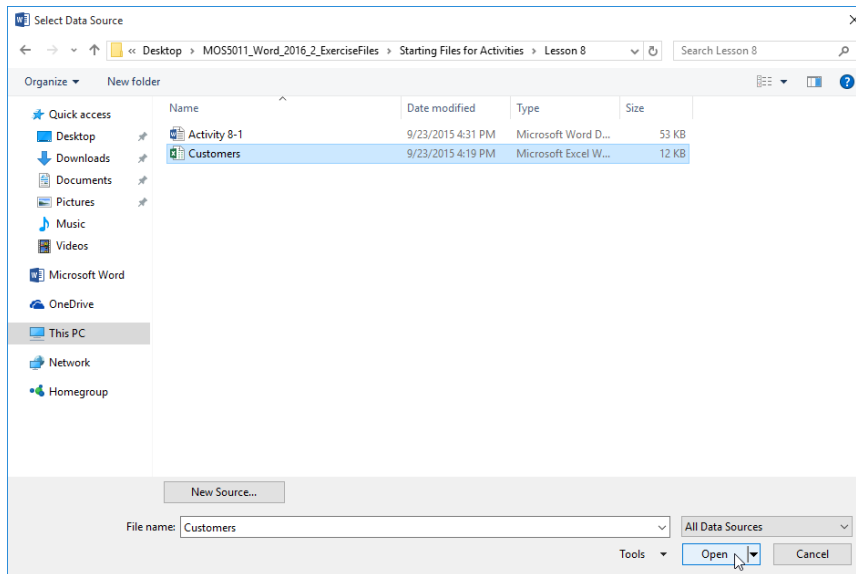
- The Envelope Options dialog box will open. Click OK to accept the default settings:



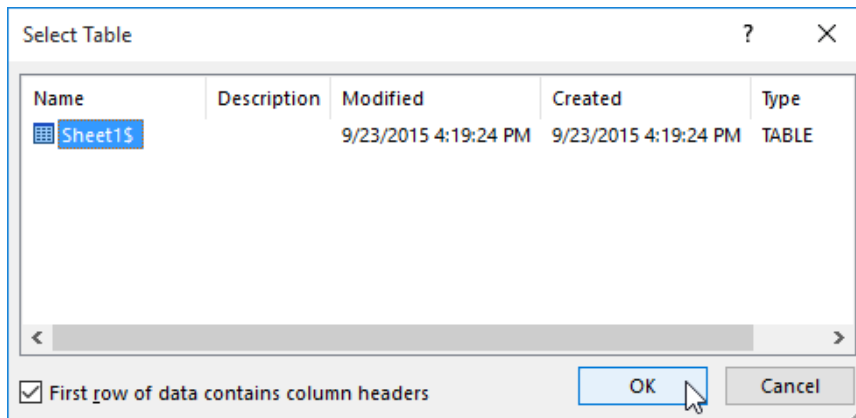
- The envelope will be created and your pre-set mailing address will be included. Now, let's add the recipients. In the third step of the Mail Merge Wizard, ensure that "Use an existing list" is selected. Click Browse:



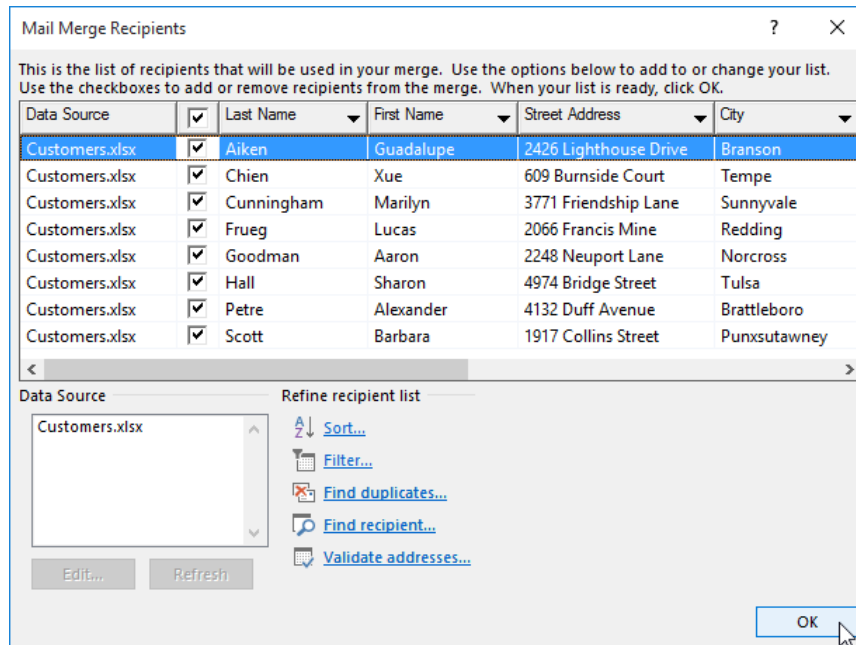
11. Browse to the Lesson 8 folder of your Exercise Files. Select the Customers spreadsheet and click Open:



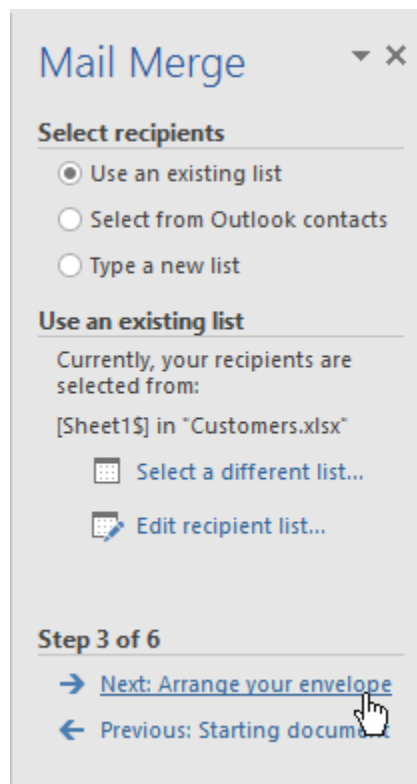
12. The Select Table dialog box will open. Click OK to use the selected sheet:



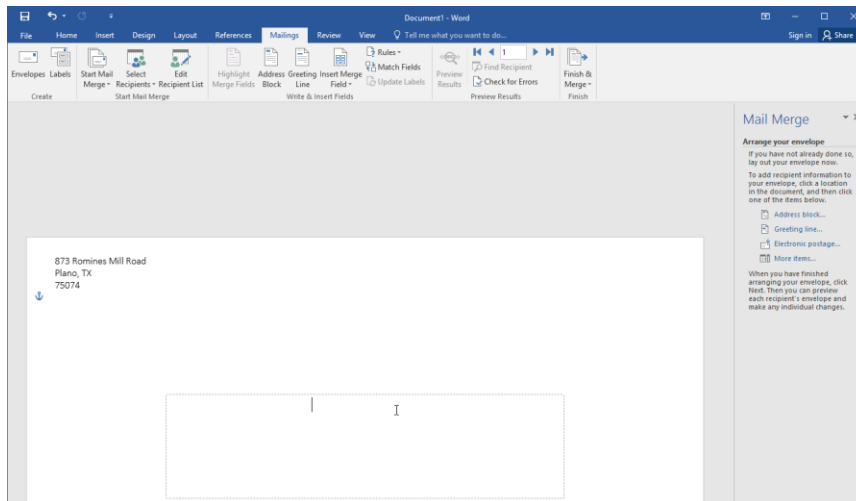
13. The Mail Merge Recipients dialog will open and show the data contained within the spreadsheet. Make sure that all of the records are checked and click OK:



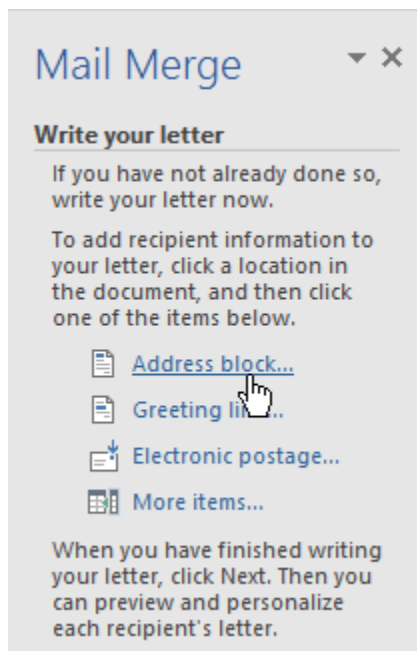
14. Click Next in the Mail Merge task pane to advance:



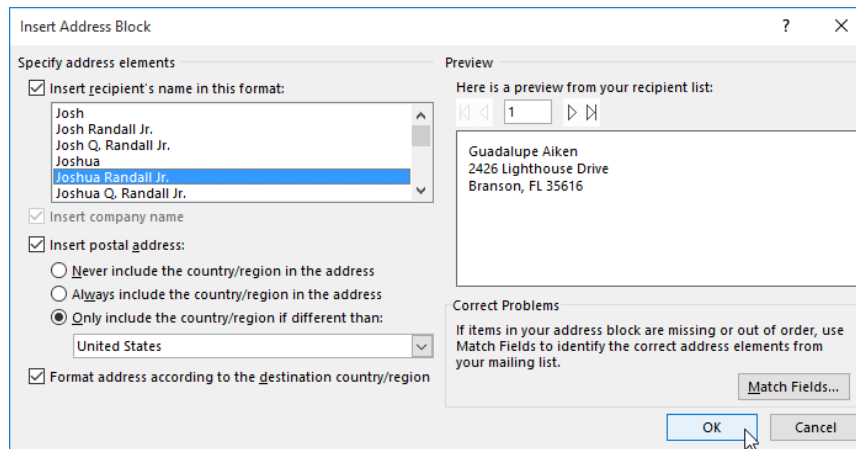
15. Now you will be prompted to set up your envelope. Move your cursor to the center of the envelope until you see the icon change to the I-beam. Click here:



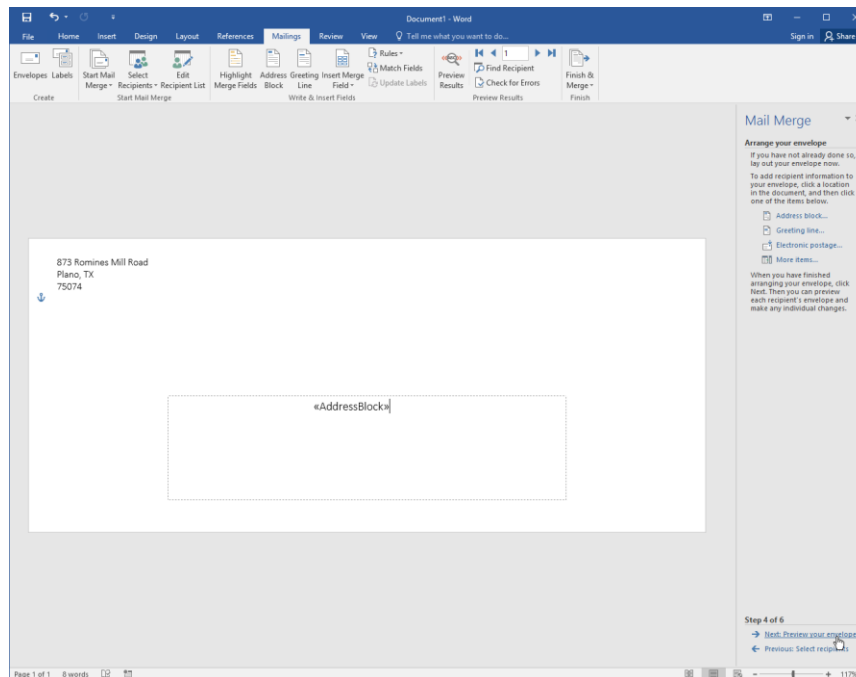
16. Now, click the “Address block” link in the Mail Merge task pane:



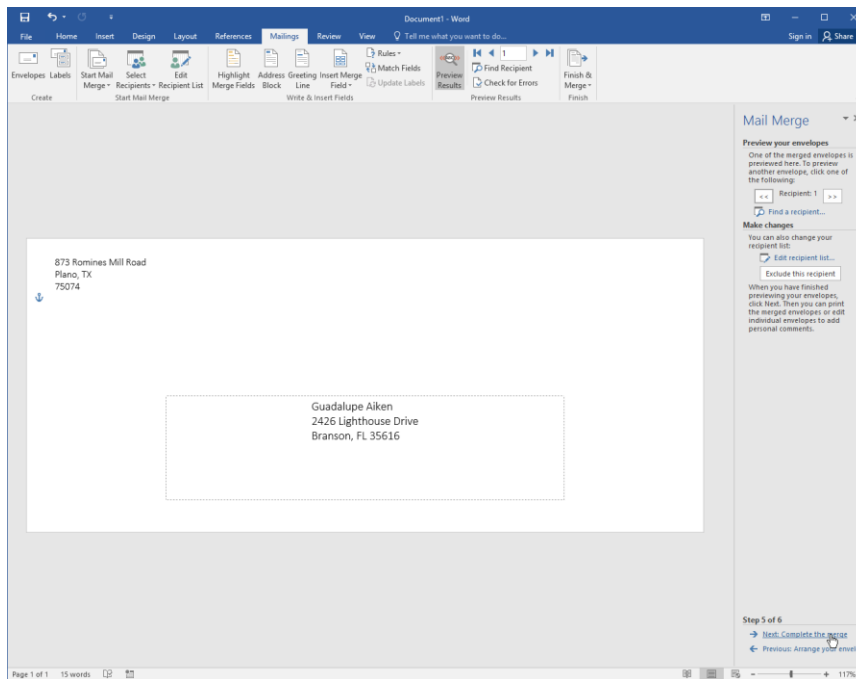
17. The Insert Address Block dialog will open. Click OK to accept the default settings:



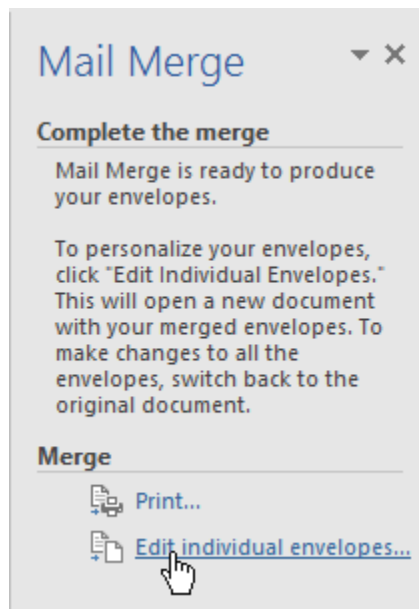
18. The Address Block merge field will be inserted. Click Next in the Mail Merge task pane:



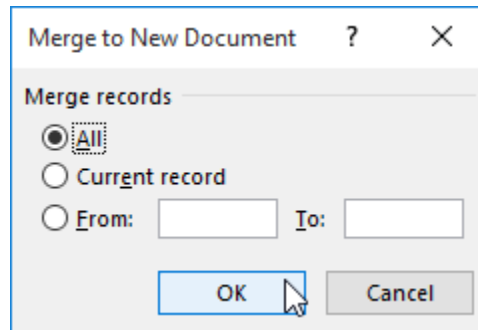
19. Now, a preview of your envelope will be shown. Make sure that everything is correct. (If you need to change anything, click the Previous link at the bottom of the task pane.) When you are satisfied, click Next:



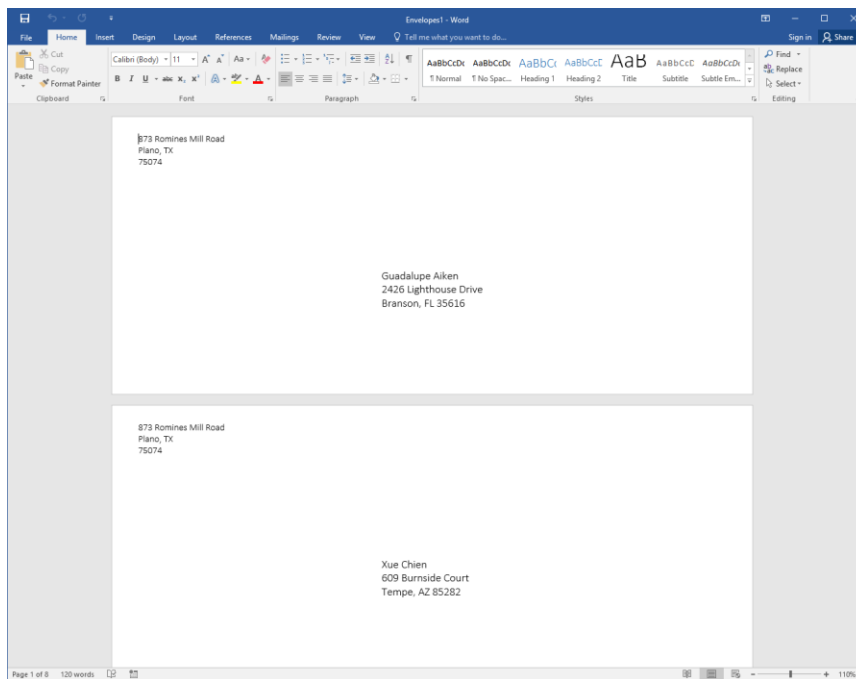
20. Click “Edit individual envelopes” in the Mail Merge Wizard to complete the merge:



21. You will be prompted to select which records to merge. Leave the All radio button selected and click OK:



22. This will create a new document with an envelope for each person on each page:



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

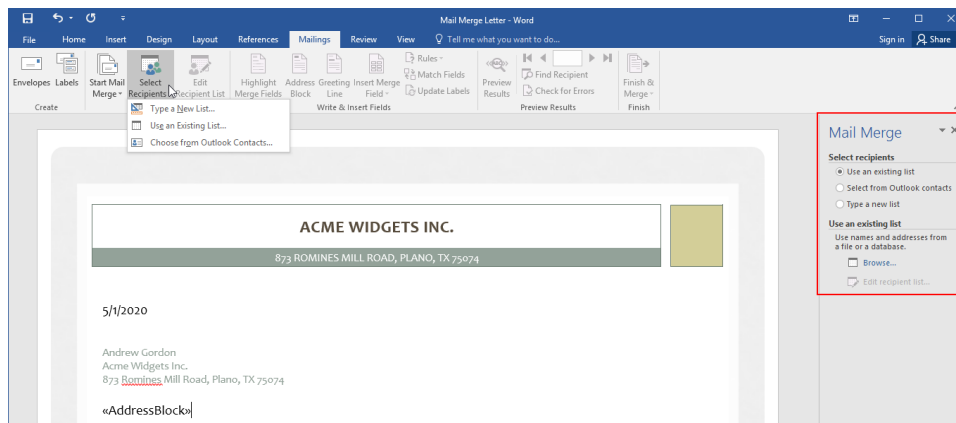
In this topic, you will learn:

- 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:



There are three options:

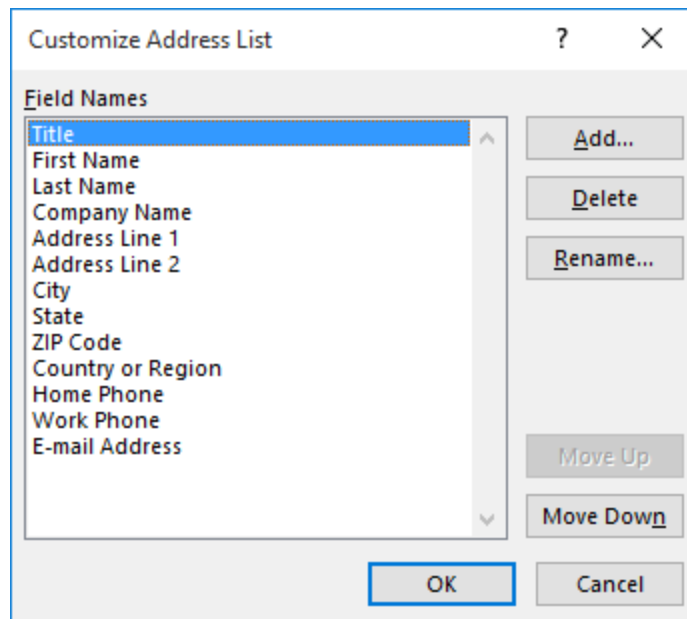
- Type a new list using Microsoft Word
- Use an existing list (such as an Access database, Excel spreadsheet, Word document, or text file)
- Select data from your Outlook contacts

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.

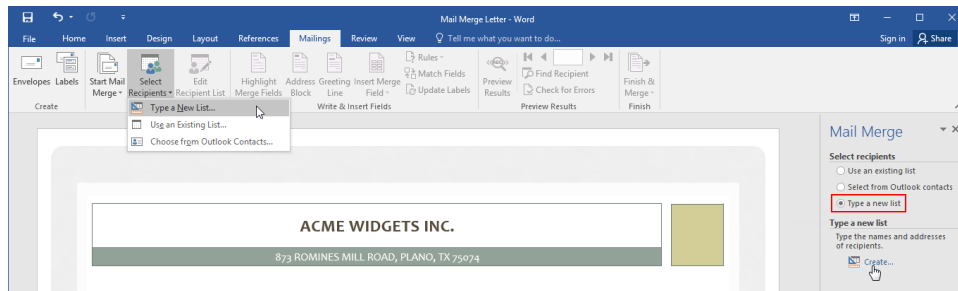
As well, try to use Microsoft Word's default fields as your field headers:



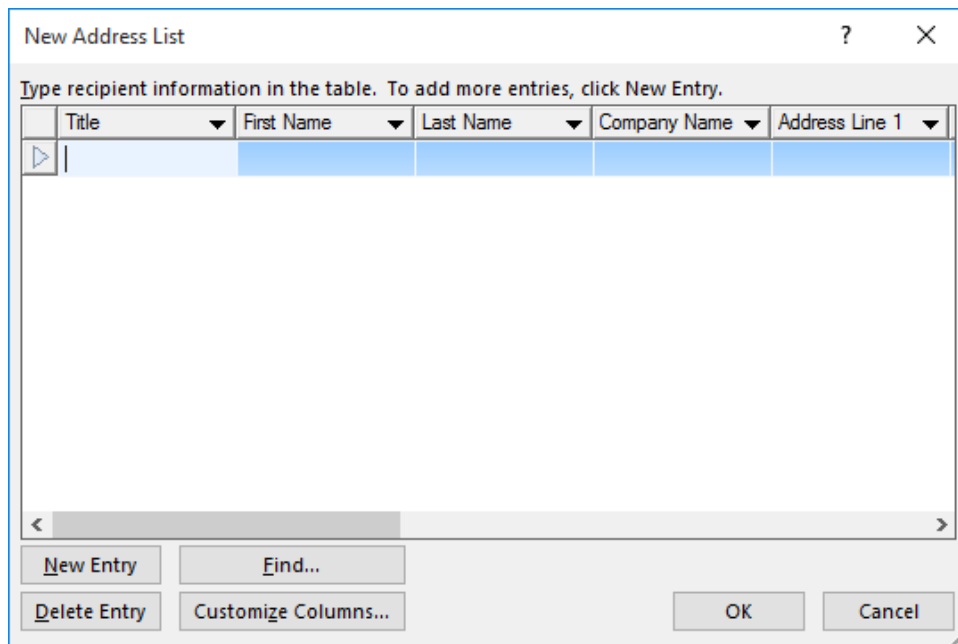
You can create custom fields and map them to your data source if necessary, but it is far easier to use the existing fields.

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 → Select Recipients → Type a New List:

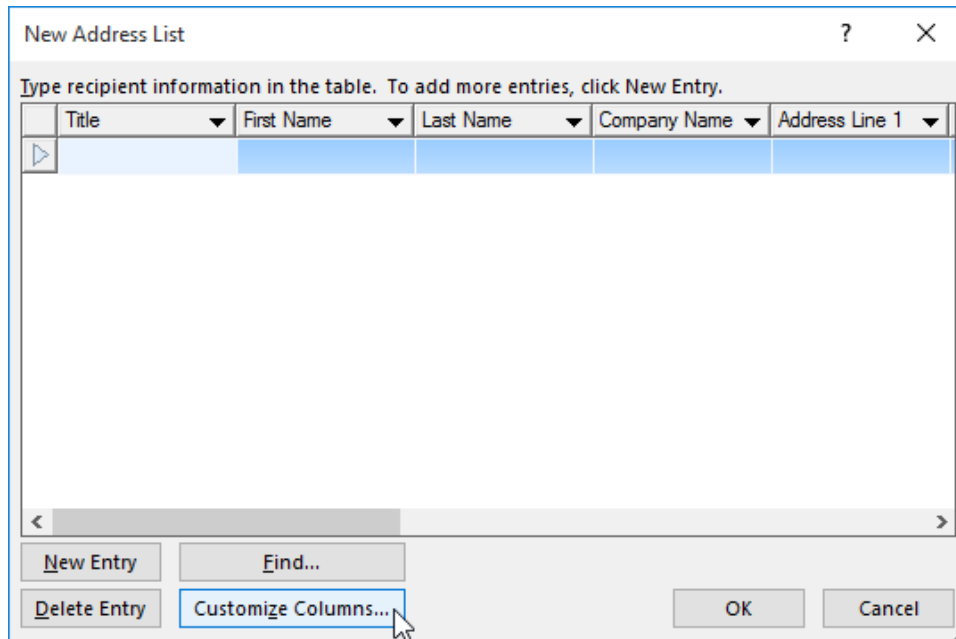


With either command, the New Address List dialog will open:

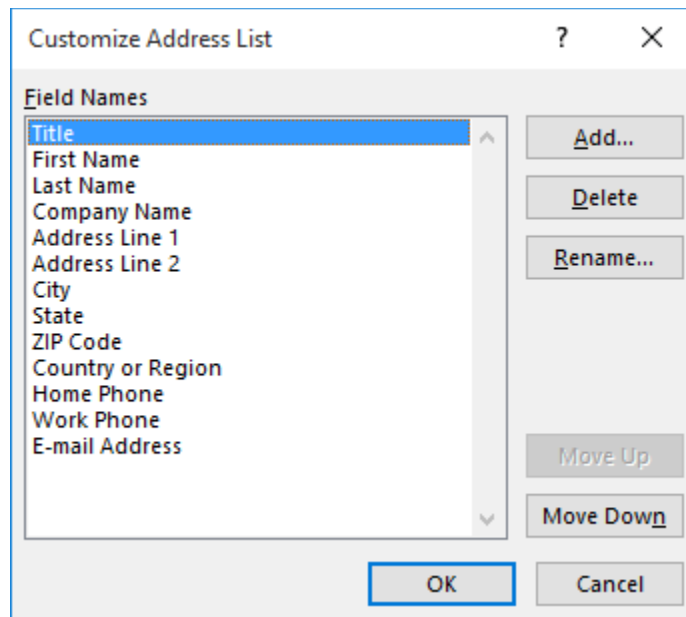


Here, you can enter your data on each row.

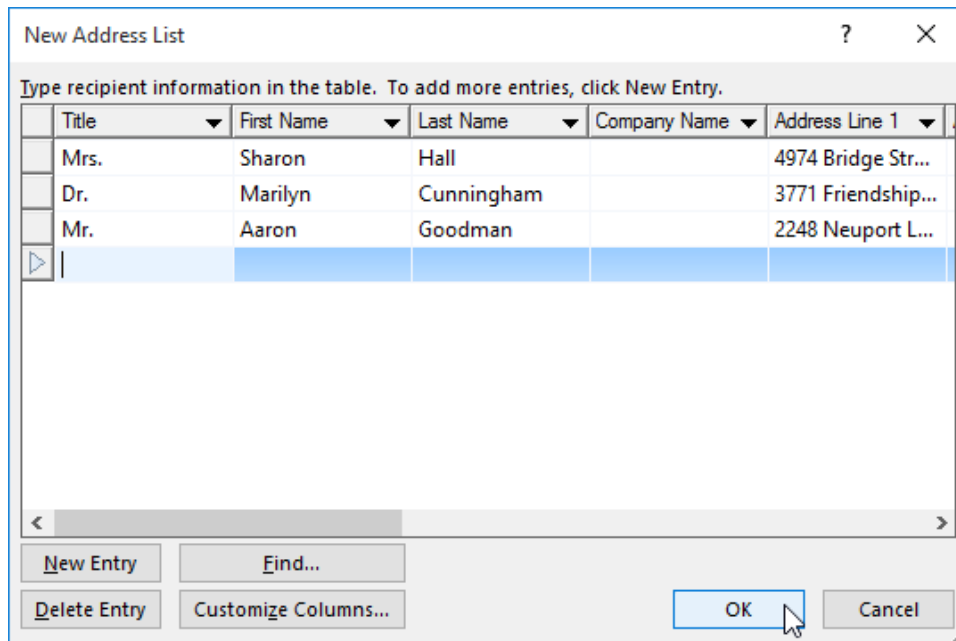
To customize the columns that appear, click the appropriate command near the bottom left-hand corner of the dialog:



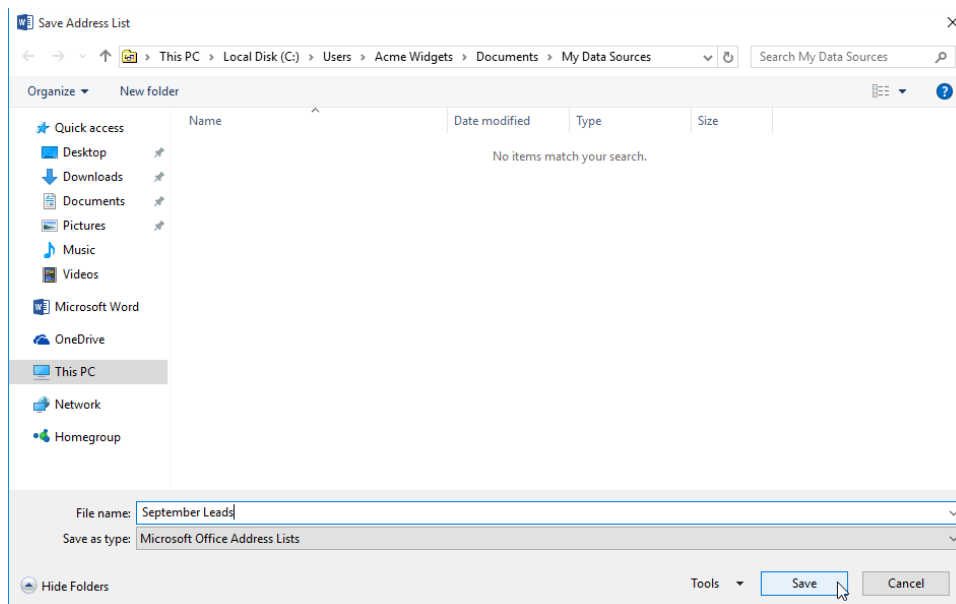
Now you can add, remove, and rename fields as desired:



Once the list is complete, click OK to save it:

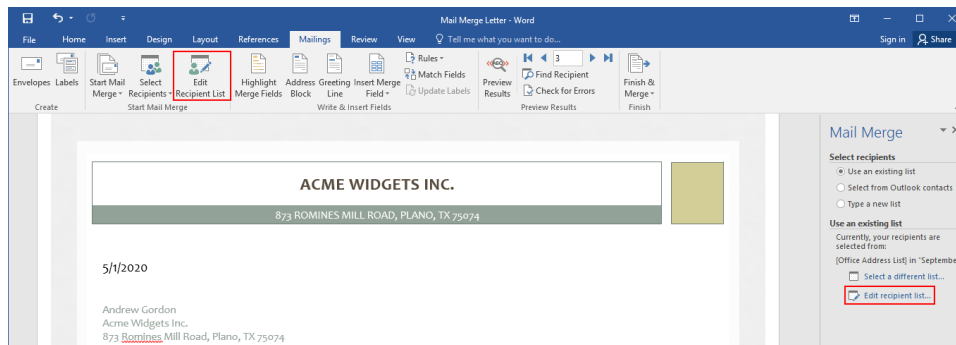


You will be prompted to enter a file name. Leave the file type and the location at the default settings and click Save:



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.

ACTIVITY 8-3

Creating a Data Source Using Word

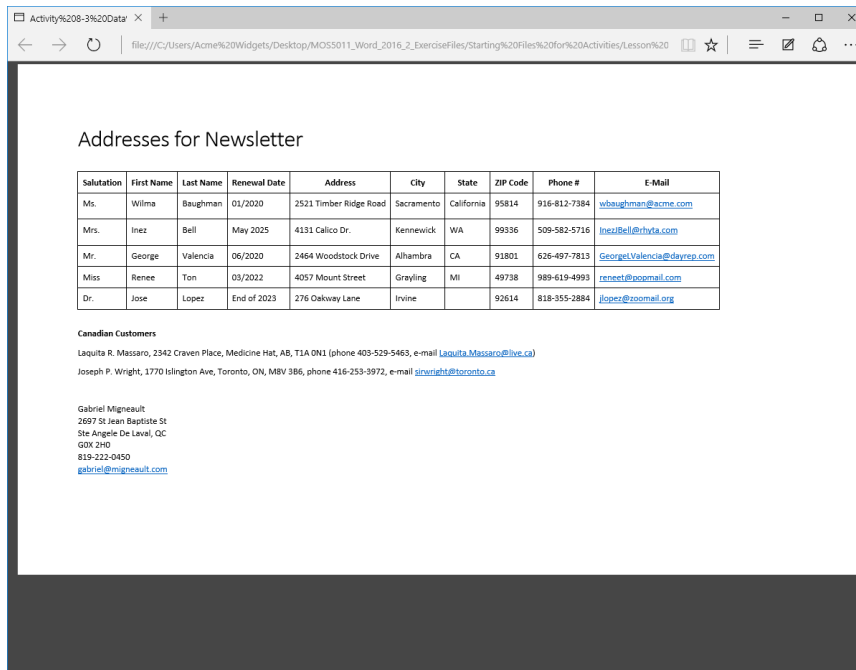
You have been given a list of names and addresses in PDF format that needs to be turned into a proper data source. In this activity, you will complete this task. You will need a PDF reader for this activity.

1. First, open the Activity 8-3 Data Source file:

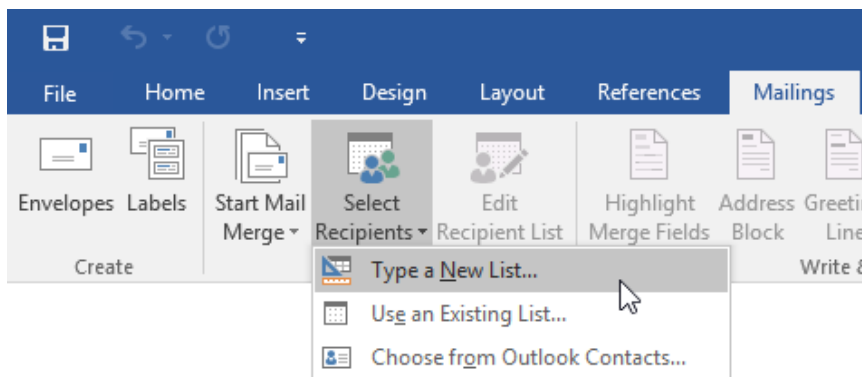


You can print this file to paper or leave it open and read from your screen.

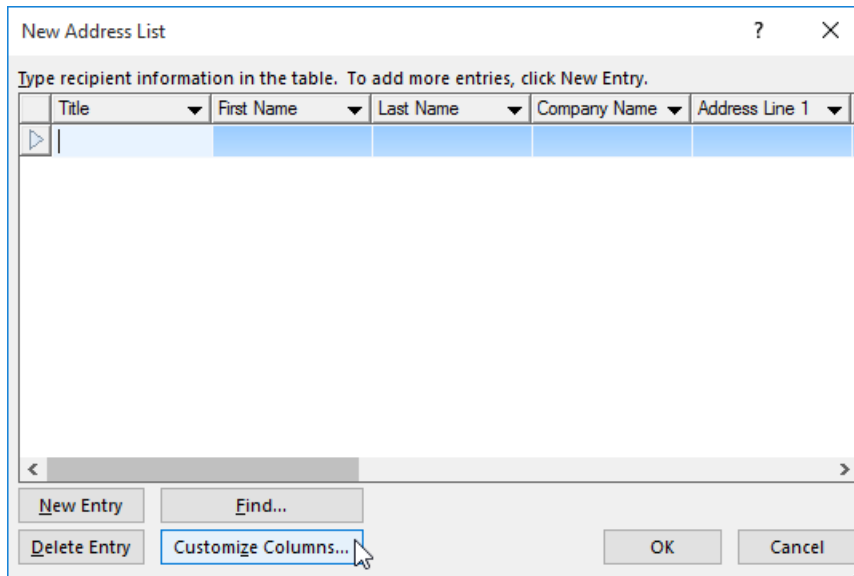
- You will see that this document contains poorly formatted, inconsistent data. It needs a number of improvements before it can be used as a data source:



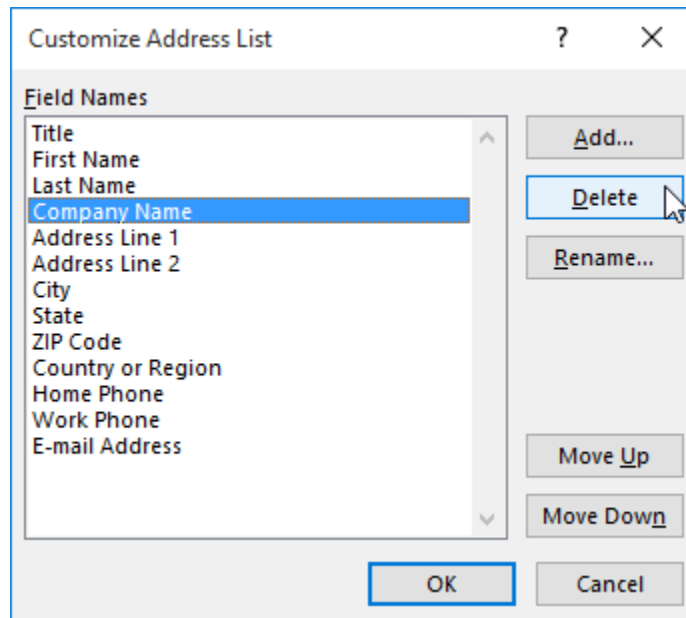
- Now, open Microsoft Word 2016 to a blank document. Click Mailings → Select Recipients → Type a New List:



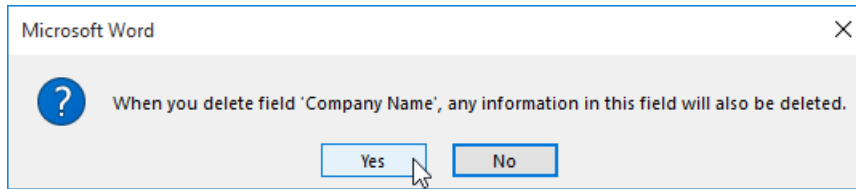
4. The New Address List dialog box will open. We need to customize the available columns, so click the Customize Columns command:



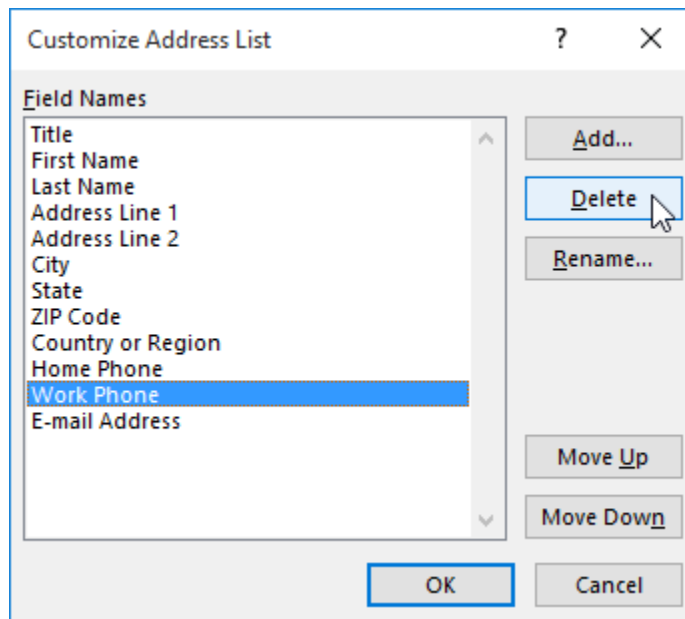
5. Select the Company Name field and click Delete:



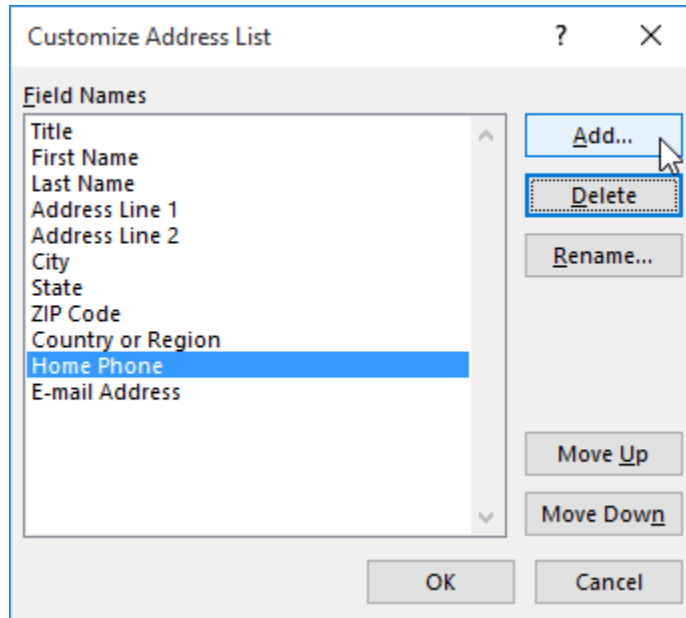
6. Click Yes to confirm the operation:



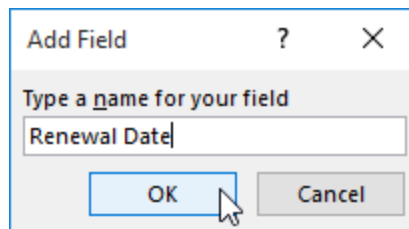
7. Repeat steps 5 and 6 to delete the Work Phone field:



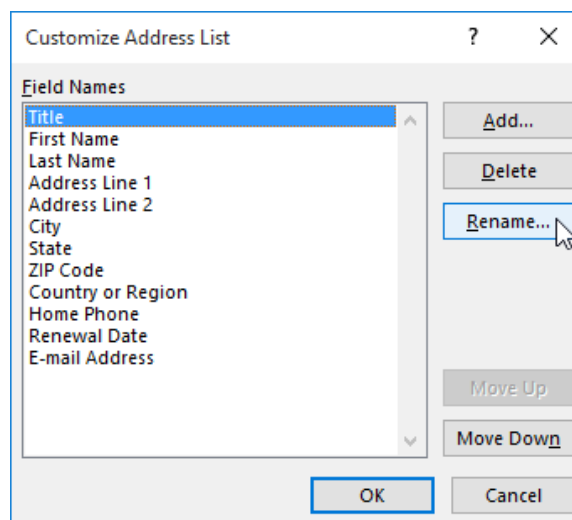
8. Next, click Add:



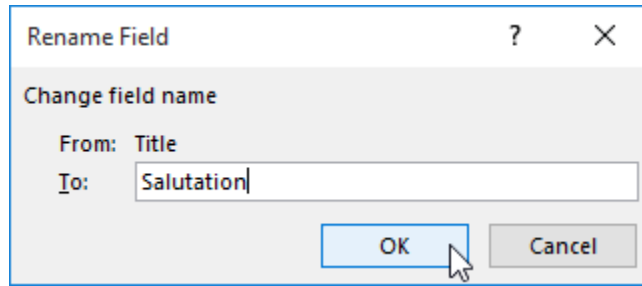
9. In the Add Field dialog, type “Renewal Date” for the field name and click OK:



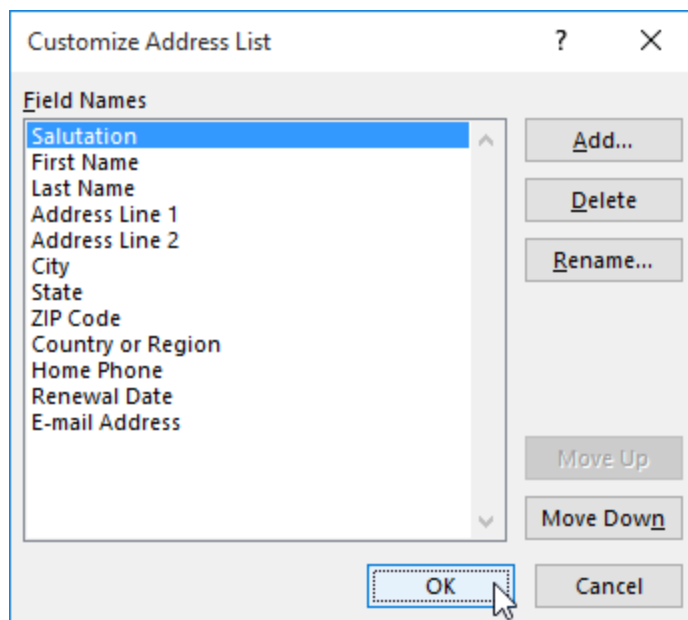
10. You will be returned to the Customize Address List dialog. Click the Title field and click Rename:



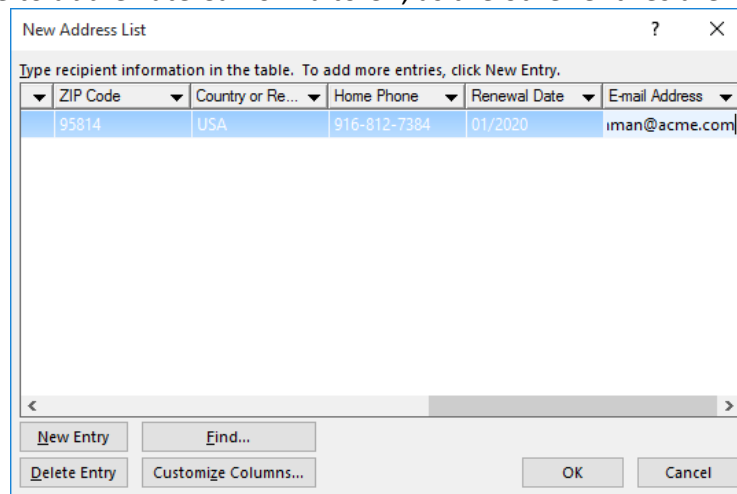
- In the Rename Field dialog box, enter “Salutation” for the new field name and click OK:



- Click OK to close the Customize Address List dialog:



- 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:



14. When you press Tab after the last field (E-mail Address), a new row will be created:

Salutation	First Name	Last Name	Address Line 1	Address Line 2
Ms.	Wilma	Baughman	2521 Timber Ri...	

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:

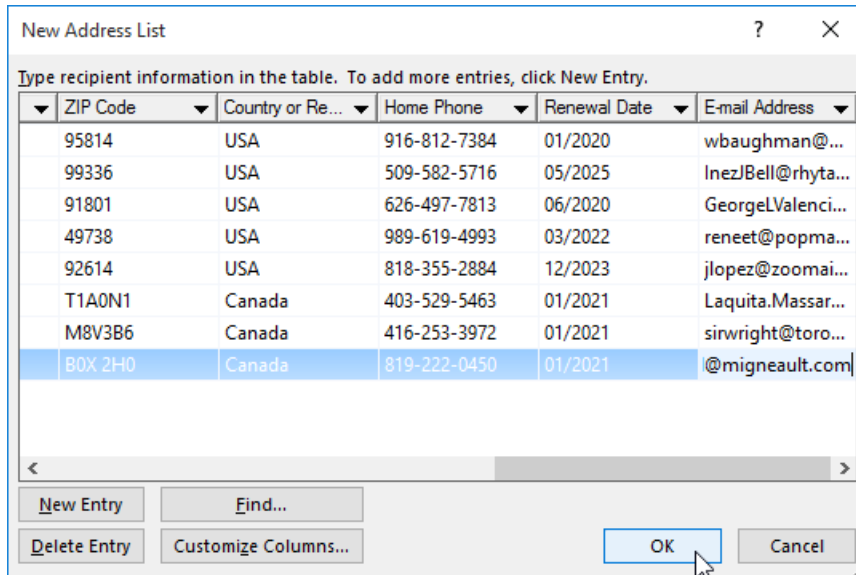
ZIP Code	Country or Re...	Home Phone	Renewal Date	E-mail Address
95814	USA	916-812-7384	01/2020	wbaughman@...
99336	USA	509-582-5716	05/2025	zJBell@rhyta.com

16. Continue entering information from the table and the list underneath it, correcting errors as you go.

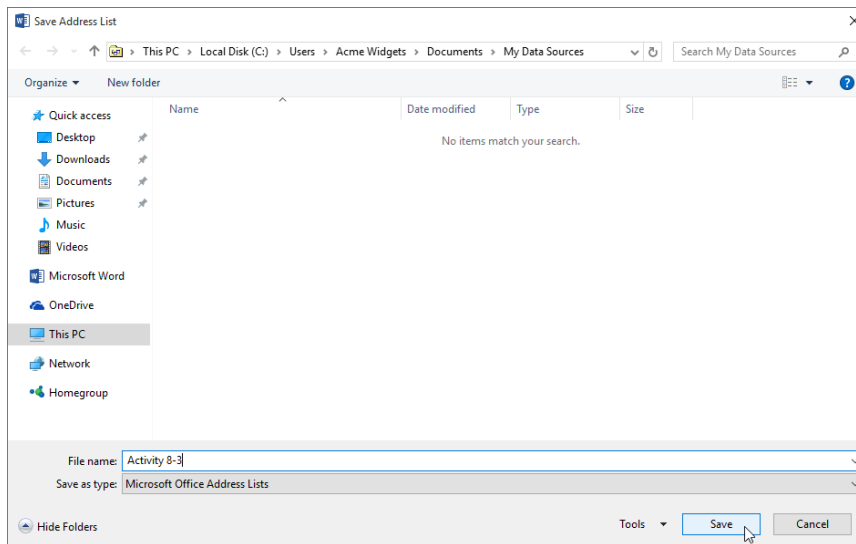
The following information may help:

- 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:



18. The Save Address List dialog will open. Enter Activity 8-3 for the file name and click Save:



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.
- 2. 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

- 1. 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.
- 3. 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 → 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

1. 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.

3. 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.

5. 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.
- 5. 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.
- 2. 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

File Management	Open a new document	Ctrl + N
	Save a file	Ctrl + S
	Open a file	Ctrl + O
	Print document	Ctrl + P
	Close Microsoft Word	Alt + F4
Text Editing	Select all	Ctrl + A
	Copy text	Ctrl + C
	Cut text	Ctrl + X
	Paste text	Ctrl + V
	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 Dialogs	Open Macros dialog	Alt + F8
	Open Visual Basic for Applications	Alt + F11
	Open Create New Building Block dialog	Alt + F3
	Open Font dialog	Ctrl + D (w/text selected)
	Get help	F1
	Check spelling	F7

Text Formatting Tools	Apply bold formatting	Ctrl + B
	Apply underlining	Ctrl + U
	Apply italic formatting	Ctrl + I
	Align text to center	Ctrl + E
	Align text to left	Ctrl + L
	Align text to right	Ctrl + R
	Justify text	Ctrl + J
	Increase font size	Ctrl + Shift + .
	Decrease font size	Ctrl + Shift + ,
	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
Styles Commands	Reveal formatting	Shift + F1
	Open Apply Styles task pane	Ctrl + Shift + S
	Open Styles task pane	Alt + Ctrl + Shift + S
	Apply Normal style	Ctrl + Shift + N
	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

Table Navigation	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
	Move one row down	Down arrow key
	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
Fields	Insert an empty field	Ctrl + F9
	Update a field	F9
	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.

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