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# ***Word 2010*** **ALL-IN-ONE** **FOR** **DUMMIES®**

**by Doug Lowe**  
**with Ryan Williams**



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# Dedication

**Doug Lowe:** To Rebecca, Sarah, and Bethany.

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# Introduction

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**W**elcome to *Word 2010 All-in-One For Dummies*, the book written especially for people who use Word every day and need a handy reference to all the various and sundry things this mighty program can do. This book contains all the basic and not-so-basic information you need to know to get the most from Word, whether you use it to compose simple letters or write 200-page government grants.

## About This Book

*Word 2010 All-in-One For Dummies* is a big book that's composed of nine smaller books, each of which covers a specific aspect of using Word. You find minibooks on such topics as editing documents, formatting pages, creating mailings, and customizing Word to make it work the way you want.

*Word 2010 All-in-One For Dummies* doesn't pretend to be a comprehensive reference for every detail of these topics. Instead, this book shows you how to get up and running fast so that you have more time to do the things you want to do. Designed using the easy-to-follow *For Dummies* format, this book helps you get the information you need without having to labor to find it.

Whenever one big thing is made up of several smaller things, confusion is always a possibility. That's why *Word 2010 All-in-One For Dummies* is designed to have multiple access points (I hear an acronym coming on — MAP!) to help you find what you want. At the beginning of the book is a detailed table of contents that covers the entire book. Each minibook begins with a miniature table of contents that shows you at a glance which chapters are included in that minibook. Useful running heads appear at the top of each page to point out the topic discussed on that page. And, handy thumb tabs run down the sides of the pages to help you quickly find each minibook. Finally, a comprehensive index lets you find information anywhere in the entire book.

This book isn't the kind you have to pick up and read from start to finish, as though it were a cheap novel. If I ever see you reading it at the beach, I'll kick sand in your face. This book is more of a reference, the kind of book you can pick up, turn to just about any page, and start reading. You don't have to memorize anything in this book. It's a need-to-know book: You pick it up when you need to know something. Need to know how to do a mail merge? Pick up the book. Need to know how to crop an image? Pick up the book. After you find what you need, put down the book and get on with your life.

## How to Use This Book

After you find your topic in the table of contents or the index, turn to the area of interest and read as much as you need or want. Then close the book and get on with it.

This book is loaded with information, of course, so if you want to take a brief excursion into your topic, you're more than welcome. If you want to know everything about customizing Word, read Book VIII. But if you just want to find out how to create a simple keyboard shortcut to apply a style you use 200 times a day, just read the section on keyboard shortcuts. You get the idea.

If you need to type something, you see the text you need to type like this: **Type this stuff**. In this example, you type **Type this stuff** at the keyboard. An explanation usually follows, just in case you're scratching your head and grunting, "Huh?"

Whenever I describe a message or information that you see onscreen, I present it this way:

A message from your friendly word processor

**Note:** The names of dialog boxes, menu commands, and options are spelled with the first letter of each main word capitalized, even though these letters might not be capitalized onscreen. This format makes sentences filled with long option names easier for you to read. (Haven't we thought of everything?)

## How This Book Is Organized

Each of the nine minibooks contained in *Word 2010 All-in-One For Dummies* stands alone. The first minibook covers the basics of using Word. The remaining minibooks cover a variety of Word topics. Even those minibooks that cover familiar ground are packed with techniques and commands you might not know about. You can find something useful in every chapter. Here's a brief description of what you find in each minibook.

### ***Book 1: What's in a Word?***

This minibook covers the basics you need in order to get going with Word. Even if you've been using Word for years, you should read these chapters. Word 2010 introduces an entirely new user interface in which the familiar menus and toolbars are replaced by a gadget named *the Ribbon*. So, be sure to familiarize yourself with this new user interface. You should also take a close look at Chapter 3, "Working with Templates." Many Word users don't realize the power of the lowly template.

### ***Book II: All about Editing***

I discuss in Book II the ins and outs of editing and formatting your text. You discover basic formatting styles such as bold and italics as well as a variety of useful editing techniques. The more you use Word, the more it pays to know all the tips and shortcuts I present in this minibook.

### ***Book III: All about Formatting***

In Book III, I give you the lowdown on formatting pages. I cover the basics of working with pages and sections, using themes to create great-looking pages, and creating advanced features such as columns and lists.

### ***Book IV: Inserting Bits and Pieces***

The Ribbon has an entire tab devoted to elements you can insert into your document, and this minibook covers the most useful of these bits and pieces. You find out about inserting graphics such as pictures and clip art; using drawing objects such as rectangles and text boxes; and formatting visual aids such as charts, diagrams, and tables.

### ***Book V: Publish or Perish***

The chapters in Book V are devoted to various ways you can use Word to share your work with others. First, you find out how to use Word's new blogging feature, which lets you use Word as the word processor for your blog site. You also read about how to use Word's collaboration and reviewing features, and how to use Word with SharePoint, a server-based collaboration program that integrates with Word.

### ***Book VI: Using Reference Features***

Book VI covers all the features found on the References tab on the Ribbon, including tables of contents, footnotes, and indexes.

### ***Book VII: Mailings***

In the chapters in Book VII, I tell you all about creating letters, envelopes, and labels in Word, from single letters to mass mailings using the mail merge feature. You even see how to use Word to send faxes. If you use Word to mail letters to customers, friends, or relatives, you should focus on Chapters 3 and 4.

### ***Book VIII: Customizing Word***

The chapters in Book VIII show you how to customize Word so that it works the way you want. You discover how to customize the user interface, set options, insert fields, and create custom forms.

## ***Book IX: Features for Developers***

The last minibook is devoted to readers who want to dig deep into the depths of Word by writing macros using Word's powerful programming language, Visual Basic for Applications (VBA). The chapters in this minibook aren't for the faint of heart, but if you're willing to take the plunge, you can make Word do things you never thought possible.

## ***Icons Used in This Book***

Like any *For Dummies* book, this book is chock-full of helpful icons that draw your attention to items of particular importance. You find these icons throughout this book:



Did I tell you about the memory course I took?



Hold it — technical stuff is just around the corner. Read on only if you have your pocket protector.



Pay special attention to this icon; it lets you know that a particularly useful tidbit is at hand — perhaps a shortcut or a little-used command that pays off big.



Danger, Will Robinson! This icon highlights information to help you avert disaster.

## ***Where to Go from Here***

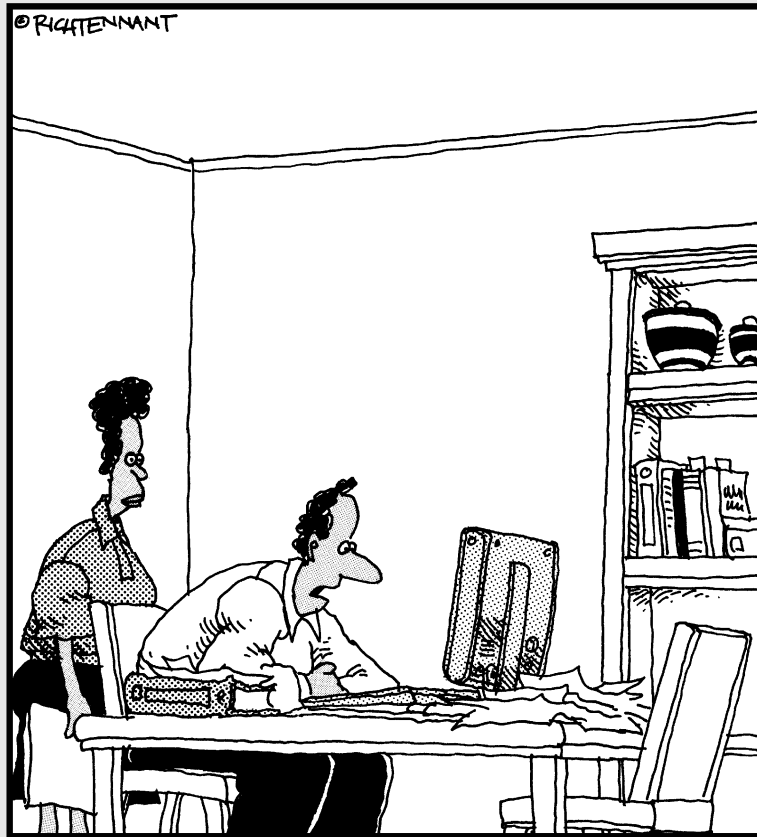
Yes, you can get there from here. With this book in hand, you're ready to plow through the rugged networking terrain. Browse through the table of contents and decide where you want to start. Be bold! Be courageous! Be adventurous! Above all, have fun!

# Book I

## What's in a Word?

The 5<sup>th</sup> Wave

By Rich Tennant



"I love the way Word justifies the text in my resume. Now if I can just get it to justify my asking salary."

## *Contents at a Glance*

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# *Chapter 1: Getting to Know Word 2010*

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## *In This Chapter*

- ✓ Getting Word started
- ✓ Making sense of all the stuff onscreen
- ✓ Dealing with the Ribbon
- ✓ Entering and editing text
- ✓ Printing your document
- ✓ Saving your work
- ✓ Closing a document and quitting Word

**T**his chapter is an introduction to the basic principles of using Word: starting the program; working with its user interface; typing and editing text; printing and saving a document; and, perhaps most important, quitting Word when you're done. Have fun!

## *Starting Word*

You can start Word in so many different ways that you can probably use a different technique every day for a fortnight. Rather than bore you with the details of every possible way to start Word, I show you the most common way first. Then I show you a couple of shortcuts that are useful if you use Word a lot.

Turn on your computer and then follow these steps to start Word:

### **1. Get ready.**

Light some votive candles. Take two Tylenol. Put on a pot of coffee. If you're allergic to banana slugs, take an allergy pill. Sit in the lotus position facing Redmond, Washington, and recite the Windows creed three times:

Bill Gates is my friend. Resistance is futile. No beer and no TV make Homer something something. . . .

## 2. Click the Start button.

Find the Start button in the lower-left corner of the Windows display. In Windows XP, it's a round-cornered box with the word *Start* in it. In Windows Vista or Windows 7, it's a round button with a four-colored flag. Either way, clicking the Start button summons the Start menu.

You can quickly summon the Start menu by pressing Ctrl+Esc.



## 3. Point to All Programs on the Start menu.

Move the cursor up to *All Programs* and hold it there a moment. Another menu appears, revealing a bevy of commands.

## 4. Click Microsoft Office on the Start menu and then click Microsoft Word 2010.

Your computer whirs and clicks and possibly makes other unmentionable noises while Word comes to life.

The following paragraphs describe some quick ways to start Word. Look into these methods if you use Word frequently and you grow weary of trudging through the depths of the Start menu:

- ◆ If you use Word frequently, its icon might appear in the *Frequently Used Programs List*, an area of the Start menu. If so, you can start Word by clicking it directly from the Start menu.



If you want Word to always appear at the top of the Start menu, choose Start⇨All Programs⇨Microsoft Office. Then right-click Microsoft Word 2010 and choose the Pin to Start Menu command. This command pins Word to the Start menu, above the Frequently Used Programs List.

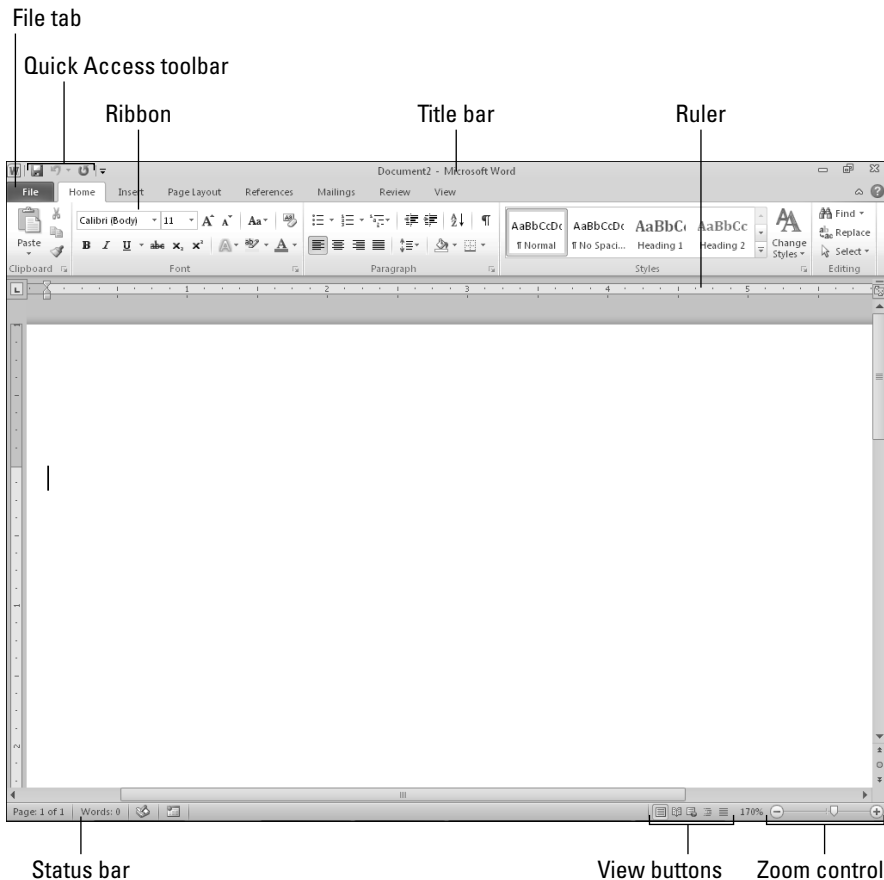
- ◆ You can create an icon for Word on your desktop. Then you can start Word by double-clicking its desktop icon. To create a desktop icon for Word, open the Start menu, navigate through All Programs and Microsoft Office, and then right-click Microsoft Word 2010 and choose Send To⇨Desktop.
- ◆ My personal favorite way to start Word is to pin it to the taskbar. To do so, while Word is running, right-click it on the taskbar and choose Pin This Program to Taskbar. From that point on, an icon for Word appears on the taskbar even when Word is not running.
- ◆ Another way to start Word is by using Windows Explorer to browse to a folder that contains a document you want to edit. Then, double-click the icon for the document. Windows responds by starting Word and opening the document you chose.
- ◆ Here's one more trick before moving on. If you use Word every day, you can set it to start automatically every time you start your computer. To do that, navigate your way through the Start menu to the Microsoft Word 2010 command. Then drag it into the Startup group under Start⇨All Programs.

## What Is All This Stuff?

When you start Word, it greets you with a screen that's so cluttered with stuff that you're soon ready to dig out your grandfather's manual typewriter. The center of the screen is mercifully blank and vaguely resembles a piece of typing paper, but all around the edges and tucked into every corner are little icons, buttons, rulers, menus, and whatnot.

Figure 1-1 shows the basic Word screen, in all its cluttered glory. The following list points out the more important parts of the Word screen:

- ◆ **Title bar:** At the very top of the Word screen is the *title bar*, which displays the name of the document you're working on. The title bar also includes the standard Minimize, Restore, and Close buttons present in every window as well as the Quick Access toolbar (described later in this list).



**Figure 1-1:**  
The cluttered Word screen.

- ◆ **The Ribbon:** Across the top of the screen, just below the title bar, is Word's main user interface gadget, the *Ribbon*. If you've worked with previous versions of Word, you were probably expecting to see a menu bar followed by one or more toolbars in this general vicinity. After meticulous research, Microsoft gurus decided that menus and toolbars are hard to use. So they replaced them with the Ribbon, which combines the functions of both. The Ribbon takes some getting used to, but after you figure it out, it does become easier to use than the old menus and toolbars. The deepest and darkest secrets of Word are hidden on the Ribbon. Wear a helmet when exploring it.

Note that the exact appearance of the Ribbon varies a bit depending on the size of your monitor. On smaller monitors, Word might compress the Ribbon a bit by using smaller buttons and arranging them differently (for example, stacking them on top of one another instead of placing them side by side).

For more information about working with the Ribbon, see the section "Unraveling the Ribbon," later in this chapter.



Although Word 2010 doesn't have menus, like versions 2003 and earlier had, many of the keyboard shortcuts (technically, they're *accelerators*) that were associated with the Word 2003 and earlier menu commands still work. For example, to call up the Open dialog box, press Alt, F, and O (for the old File⇨Open command). To insert clip art, press Alt, I, P, and C (for the old Insert⇨Picture⇨Clip Art command). To keep things simple, this book doesn't specifically mention these accelerators. However, if you remember them from your Word 2003 days, you can continue to use them. Keyboard shortcuts with the Alt key are also available for the 2010 menu system; press the Alt key to display key tips for each tab; then type the letter for one of the tabs to see key tips for each command on that tab.

- ◆ **The File tab:** The File tab replaces the Office button from Word 2007. You can click it to reveal a major new feature of Word 2010: *Backstage view*. Backstage view is the place to come when you need to open or save files, create new documents, print a document, and do other file-related chores. For more information, see the section "Taking the Backstage Tour," later in this chapter.
- ◆ **Quick Access toolbar:** Just above the File tab is the *Quick Access toolbar*. Its sole purpose in life is to provide a convenient resting place for the Word commands you use the most often.

Initially, this toolbar contains just three buttons: Save, Undo, and Redo. However, you can add buttons, if you want. To add a button to the Quick Access toolbar, right-click the button on the Ribbon and choose Add to Quick Access toolbar. You can also find a pull-down menu at the end of the toolbar that lists several frequently used commands. You can use this menu to add these common commands to it.

- ◆ **Ruler:** Word has two rulers: a horizontal ruler and a vertical ruler. The horizontal ruler appears just beneath the Ribbon and is used to set margins and tab stops. The vertical ruler appears on the left edge of the Word window and is used to gauge the vertical position of elements on the page. (If the ruler doesn't appear, you can summon it by clicking the View tab on the Ribbon and then selecting the Ruler check box in the Show group.)

- ◆ **Task pane:** Some commands and options open a *task pane* to the right or left of the main editing pane, containing additional controls or features. For example, the Clip Art task pane appears on the right when inserting clip art, and the Clipboard task pane appears at the left when using the Office Clipboard. Figure 1-1 doesn't show task panes; they appear on their own whenever you need them. If a task pane gets in the way, you can always get rid of it by clicking its Close button (the X in the upper-right corner of the task pane).

- ◆ **Status bar:** At the bottom of the screen is the *status bar*, which tells you the page that's displayed (for example, Page 5 of 11).



You can configure the status bar by right-clicking anywhere on it. This action reveals a list of options that you can select or deselect to determine which elements appear on the status bar.

- ◆ **View buttons:** The group of five buttons located to the left of the Zoom control, near the bottom of the screen, lets you switch among Word's various document views. You can find out more about these views in the later section "The View from Here Is Great."

- ◆ **Zoom control:** In the lower-right corner of the screen is the Zoom control, which lets you zoom in for a closer look at your text. The zoom control consists of a slider that you can slide left or right to zoom in or out, – and + buttons you can click to increase or decrease the zoom factor, and a number that indicates the current zoom percentage. Note that this number consists of a button; if you click it, Word displays a dialog box with additional zoom options.

You never get anything done if you feel that you have to understand every pixel of the Word screen before you can do anything. Don't worry about the stuff that you don't understand; just concentrate on what you need to know to get the job done and worry about the bells and whistles later.



Lots of stuff is crammed onto the Word screen — enough stuff that the program works best if you let it run in *maximized* mode. If Word doesn't take over your entire screen, find the boxy-looking Maximize button on the right side of the title bar. (It's the middle of the three buttons.) Click it to maximize the Word screen. Click it again to restore Word to its smaller size.

### *Unraveling the Ribbon*

The Ribbon, first introduced in Word 2007, is the all-in-one user interface gadget that replaces the menus and toolbars found in earlier versions of Word. The Ribbon is not just for Word 2010 but also for Excel 2010, PowerPoint 2010, and Access 2010.

Across the top of the Ribbon is a series of tabs. You can click one of these tabs to reveal a set of controls specific to that tab. For example, the Ribbon (refer to Figure 1-1) shows the Home tab. Initially, the Ribbon displays these seven tabs:

- ◆ **Home:** Basic commands for creating and formatting documents. You can find controls for working with the Clipboard, setting the font, formatting paragraphs, applying styles, and using Find and Replace.
- ◆ **Insert:** Commands for inserting various items into your document, including new pages, tables, pictures, shapes, and other types of illustrations, headers and footers, specially formatted text, and much more! Most of these features are covered in Book IV.
- ◆ **Page Layout:** Commands that let you tweak the layout of your document's pages. You can apply a theme to your document to set the overall look of the document or control details such as the page margins and background colors. You find out about these features in Book III.
- ◆ **References:** Commands that let you create tables of contents, footnotes, bibliographies, indexes, and other elements. You discover how to use these features in Book VI.
- ◆ **Mailings:** Commands for creating mail merges. I show you how to use this tab in Book VII.
- ◆ **Review:** Commands for proofing and adding comments to your documents and tracking changes. For more information, see Chapter 3 of Book V.
- ◆ **View:** Commands that let you change the view. You can use this tab to switch to different document views, to show or hide certain types of information (such as paragraph marks), and to zoom in for a closer look at your document.

Besides these basic tabs, additional tabs appear from time to time. For example, if you select a picture, a Picture Tools contextual tab appears with commands that let you manipulate the picture. These contextual tabs display in a different color to make them easy to spot. Also, sometimes two or more contextual tabs appear at the same time. For example, if you select a picture within a table, two contextual tabs appear: one for the table, the other for the picture.



The commands on a tab are organized into groups. Within each group, most commands are simple buttons that are similar to toolbar buttons in previous versions of Word.

One of the most important differences between Word 2007 and Word 2010 is that you can easily customize the Word 2010 user interface. In Word 2007, the Ribbon was not customizable; you could only add and remove buttons from the Quick Access toolbar. Word 2010 enables you to create your own groups and tabs on the Ribbon. For more information, see Chapter 1 of Book VIII.

## The View from Here Is Great

On the lower-right edge of the Word screen (just to the left of the Zoom control) is a series of five View buttons that let you switch among various document views. The following paragraphs describe these five views:



- ◆ **Print Layout view** displays pages exactly as they will appear when printed, complete with columns, headers, footers, and all other formatting details. This view is the one you'll work in most often.



- ◆ **Full Screen Reading view** was designed for easy onscreen reading.



- ◆ **Web Layout view** shows how a document appears when viewed by a Web browser, such as Internet Explorer. Web Layout view is the mode you normally work in when you use Word to create HTML documents.



- ◆ **Outline view** lets you work with outlines established using Word's standard heading styles. For more information about using outlines, consult Book VI, Chapter 6.



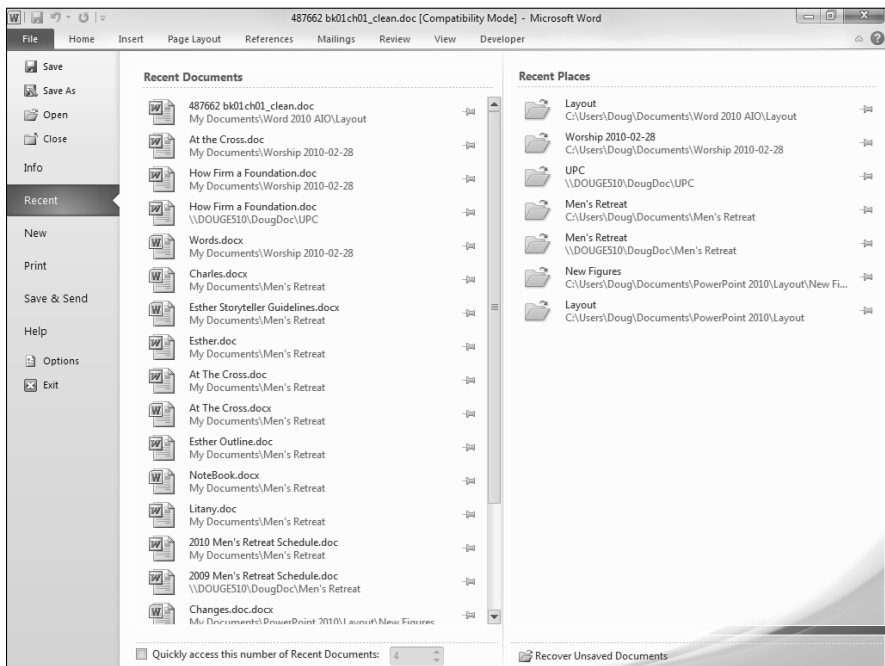
- ◆ **Draft view** formats text as it appears on the printed page with a few exceptions. For example, headers and footers aren't shown. Most people prefer this mode.

## Taking the Backstage Tour

Every June I attend the Oregon Shakespeare Festival in Ashland, Oregon. A few years ago, I took the special backstage tour, in which I learned all kinds of nifty secrets worthy of a Dan Brown novel.

Let's take a brief tour of Word's Backstage feature, which provides access to document management features previously found on the File menu. When you click the File tab in the upper-left corner of the Word window, Word switches to Backstage view, shown in Figure 1-2.

**Figure 1-2:**  
Backstage view.



The information initially displayed in Backstage view depends on whether you have an active document open. If no document is open, Backstage view displays a list of documents you've recently worked with. If a document is open, Backstage view displays information about the document.

The menu on the left — which bears a striking resemblance to what we used to call the File menu, back in the day when programs had plain menus instead of fancy ribbons — provides access to the hidden features of Word available only to those who venture backstage.

I briefly introduce you to some of these commands later in this chapter, but I take you on a more detailed backstage tour in Chapter 2 of this minibook.



At this point, probably the most important thing you need to know about Backstage view is how to get out of it. You can close Backstage view and return to your document by pressing the Escape key or by clicking the File tab again (or any Ribbon tab, for that matter).



Okay, the only secret I learned on the backstage tour at Ashland that was truly worthy of a Dan Brown novel is the one about Psalm 46 in the King James translation of the Bible, which was published in 1611 — when William Shakespeare turned 46. If you count 46 words from the start of the Psalm, you see the word *Shake*. And, if you count 46 words backward from the end



of the psalm, you see the word *Spear* — which clearly means that treasure is buried directly beneath the stage in Ashland’s outdoor theater. Next year, I’m taking a shovel.

## Creating a Basic Document

Creating a basic document in Word 2010 is easy: All you have to do is start Word 2010 and a basic document is automatically created for you. This document is initially named Document1, but you give it a more meaningful name when you save it, as described later in this chapter, in the section “Saving Your Work.”

For more information about creating documents, refer to Chapter 2 in this minibook.

## Typing and Editing Text

I devote all of Book II to the many and sundry techniques for editing your documents. In the following paragraphs, I just highlight some basic editing techniques to get you started:

- ◆ Any text you type is inserted into the document at the location of the *insertion point*. You can move the insertion point around the screen by using the movement keys (the four keys with arrows pointing up, down, left, and right) or by simply clicking at the location you want to move the insertion point to.



- ◆ In previous versions of Word, you could switch to *Overtyping mode* by pressing the Insert key. Then any text you typed replaced the text already on the page. Few people switched to Overtyping mode on purpose, and it was all too easy to switch to it accidentally. As a result, Microsoft wisely disabled the Insert key for this purpose. (You can reactivate this feature from the Word Options dialog box, if you want, but I don’t recommend it.)

- ◆ If you make a mistake (never!), press Backspace to back up, erasing text as you go. For more efficient ways to correct mistakes, refer to Book II.



- ◆ Press Enter at the end of each paragraph to begin a new paragraph.  
Don’t press Enter at the end of every line. Word automatically wraps your text to the next line when it reaches the margin.
- ◆ Press Tab to indent text. Don’t press the spacebar repeatedly to indent text; that’s a rookie mistake.

## Printing Your Masterpiece

After you finish your masterpiece, you might want to print it. I have a lot more to say about printing in Chapter 4 of this minibook. But for now, here's the quick procedure for printing a document:

### 1. Make sure that your printer is turned on and ready to print.

Check the paper supply while you're at it.

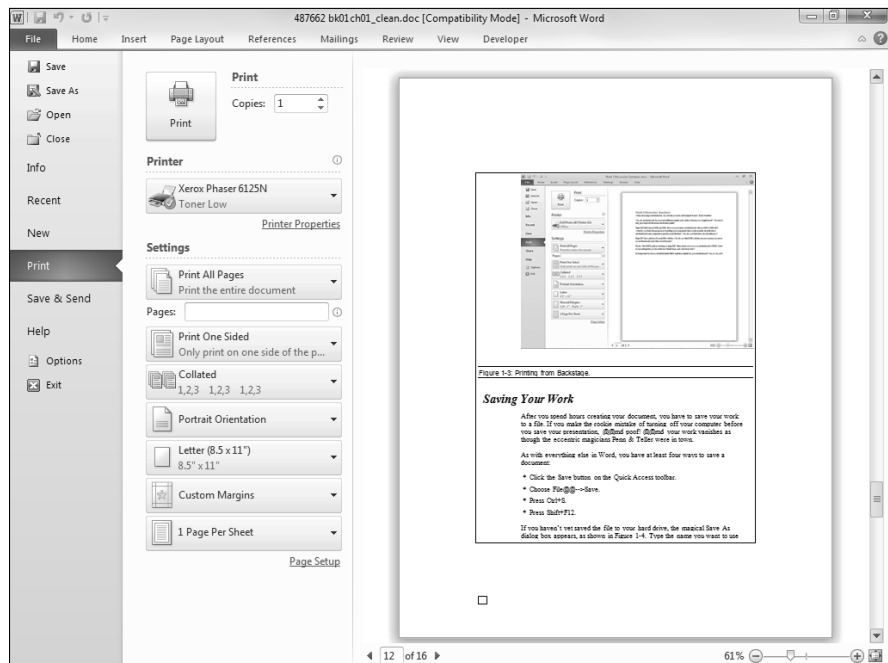
### 2. Click the File tab to open Backstage view and then choose Print from the backstage menu.

This action summons the Backstage Print page, as shown in Figure 1-3. The Print page has a myriad of options you can fiddle with to print just parts of your document or to print more than one copy. To print a single copy of the entire document, you can leave these settings alone.

### 3. Click the Print button.

Make sure that you say "Print" in a knowing manner, pointing at your printer as you do so. The secret is to fool your printer into thinking you know what you're doing.

**Figure 1-3:**  
Printing  
from  
Backstage.



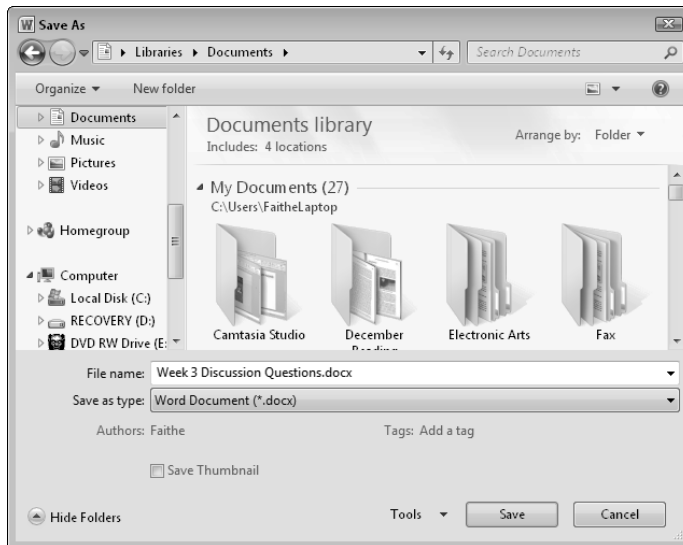
## Saving Your Work

After you spend hours creating your document, you have to save your work to a file. If you make the rookie mistake of turning off your computer before you save your presentation, — poof! — your work vanishes as though the eccentric magicians Penn & Teller were in town.

As with everything else in Word, you have at least four ways to save a document:

- ◆ Click the Save button on the Quick Access toolbar.
- ◆ Choose File⇨Save.
- ◆ Press Ctrl+S.
- ◆ Press Shift+F12.

If you haven't yet saved the file to your hard drive, the magical Save As dialog box appears, as shown in Figure 1-4. Type the name you want to use for the file in the File Name text box and click the Save button to save the file. After you save the file once, subsequent saves update the hard drive file with any changes that you made to the document since the last time you saved it.



**Figure 1-4:**  
The Save As  
dialog box.



If you somehow miss out on saving your work, such as if the power goes out unexpectedly or Word crashes, all is not lost. Word autosaves your work for you at defined intervals (by default, it's every ten minutes), and when you restart Word, a Recover Unsaved Documents pane appears listing any recoverable temporary saves.

Keep these notes in mind when saving files:

- ◆ Put on your thinking cap when assigning a name to a new file. The file-name is how you can recognize the file later on, so pick a meaningful name that indicates the file's contents.
- ◆ After you save a file for the first time, the name on the Word title bar changes from *Document1* to the name of your file. This name is simply proof that you saved the file.



- ◆ Don't work on your file for hours at a time without saving it. Word's Recover Unsaved Documents feature might save you when disaster strikes, but it's not perfect, so don't count on it. I learned the hard way to save my work every few minutes. After all, I live in California, so I never know when a rolling blackout will hit my neighborhood. Get into the habit of saving every few minutes, especially after making a significant change to a document. In fact, I usually save after completing every paragraph. You should also save every time you print.

## *Opening a Document*

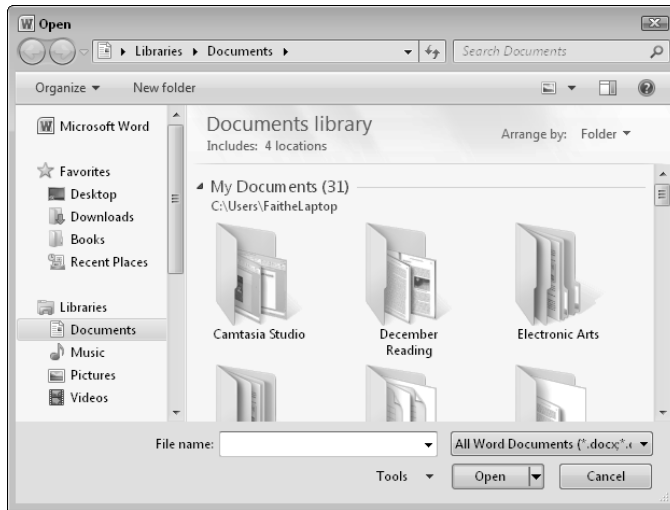
After you save a document to your hard drive, you can retrieve the document later when you want to make additional changes or to print it. As you might guess, Word gives you 2,037 ways to accomplish the retrieval. Here are the most common:

- ◆ Choose File⇨Open.
- ◆ Press Ctrl+O.
- ◆ Press Ctrl+F12.

Each of these methods pops up the Open dialog box, which gives you a list of files to choose from, as shown in Figure 1-5. Click the file you want and then click the Open button or press Enter.

The Open dialog box has controls that enable you to rummage through the various folders on your hard drive in search of your files. If you know how to open a file in any Windows application, you know how to do it in Word; the Open dialog box is much the same in any Windows program.

**Figure 1-5:**  
The Open  
dialog box.



**TIP**

The fastest way to open a file from the Open dialog box is to double-click the file you want to open. This action spares you from having to click the file once and then clicking Open. Double-clicking also exercises the fast-twitch muscles in your index finger.



**TIP**

Word keeps track of files you've recently opened and displays them on the right side of the File tab (Recent page). To open a file you've recently opened, click the File tab, click Recent (if necessary), and inspect the list of files that appear on the menu. If the file you want is in the list, click it to open it. (Note that in previous versions, Word displayed only the four most recent documents you've edited. Word 2010 displays 20 recent documents by default, and you can use the File⇨Options command to change the number of recent documents displayed.)

## Closing a Document

Having finished your document and printed it just right, you have come to the time to close it. Closing a document is kind of like gathering up your papers, putting them neatly in a file folder, and returning the folder to its proper file drawer. The document disappears from your computer screen. Don't worry: It's tucked safely away on your hard drive, where you can get to it later if you need to.

To close a file, choose File⇨Close. You also can use the keyboard short-cut Ctrl+W, but you need a mind like a steel trap to remember that Ctrl+W stands for Close.



You don't have to close a file before exiting Word. If you exit Word without closing a file, Word graciously closes the file for you. The only reason you might want to close a file is that you want to work on a different file and you don't want to keep both files open at the same time.

If you made changes since the last time you saved the file, Word offers to save the changes for you. Click Save to save the file before closing or click Don't Save to abandon any changes you've made to the file.

If you close all open Word documents, you might discover that most Word commands are rendered useless. (They're grayed out on the menu.) Fear not. Open a document, or create a new one, and the commands return to life.

## *Exiting Word*

Had enough excitement for one day? Use any of these techniques to shut down Word:

- ◆ Choose File⇨Exit.
- ◆ Click the X box in the upper-right corner of the Word window.
- ◆ Press Alt+F4.

Bam! Word is history.

You should know a few things about exiting Word (or any application):

- ◆ Word doesn't let you abandon ship without first considering whether you want to save your work. If you made changes to any documents and haven't saved them, Word offers to save the documents for you. Lean over and plant a fat kiss right in the middle of your monitor — Word just saved you your job.
- ◆ *Never* turn off your computer while Word or any other program is running. It's a bad idea! You might lose whatever work you've done since the last time you saved, and you run the risk of losing your document altogether and perhaps even corrupting other documents. Always properly exit Word and all other programs that are running before you turn off your computer.



# *Chapter 2: Your Backstage Pass for Managing Documents*

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## *In This Chapter*

- ✓ Creating new documents
- ✓ Opening existing documents
- ✓ Finding files gone astray
- ✓ Retrieving files from the Internet
- ✓ Saving documents and setting the Word file-saving options
- ✓ Password-protecting your files

**T**he new Backstage view in Word is the central place for managing your documents — creating new documents, saving and opening documents, printing and sharing documents, and so on. You can't get far in Word without knowing how to work with the Backstage view. So, this chapter provides a quick tour of its features.

Note that one of the major features available from Backstage view — printing — is covered in detail in Chapter 4 of this minibook.

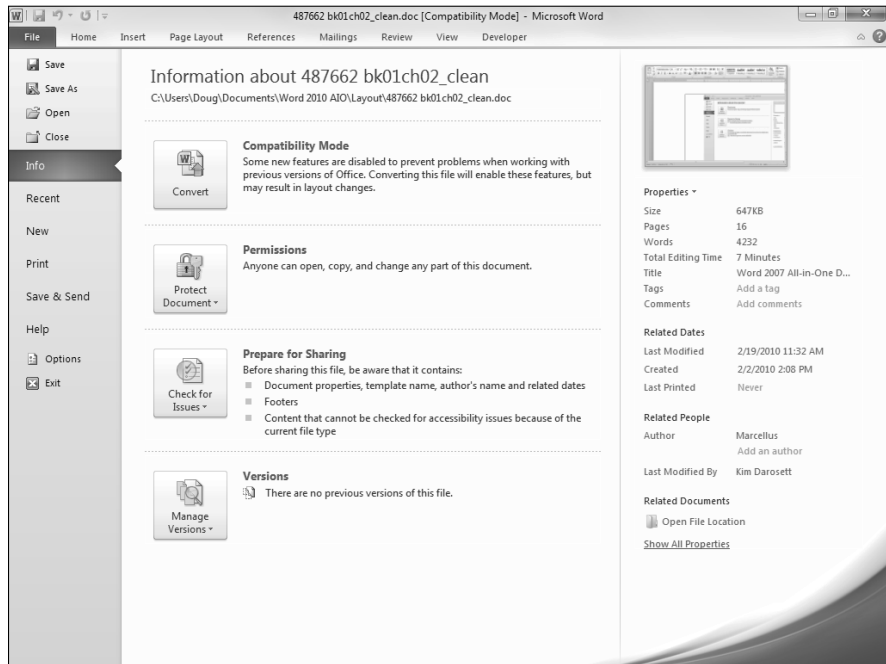
Getting to the Backstage feature is easy: Just click the File tab, located in the upper-left corner of the Word Ribbon, as shown in the margin. After you're in Backstage view, you can get out by clicking any other tab (Home, for example) or by pressing the Esc key.

## *Getting Information about Your Document*

Assuming a document is open when you click the File tab, Word opens Backstage view with a display of interesting and useful information about the current document, as shown in Figure 2-1.

## 22 *Getting Information about Your Document*

**Figure 2-1:** Backstage view displays information about the current document, assuming that a document is open.



As you can see, the information on the Info page is grouped into categories:

- ◆ **Compatibility Mode:** If the document is not a native Word 2007/2010 document, a Convert button appears here, enabling you to easily update its format. Otherwise, this category does not appear.
- ◆ **Permissions:** Indicates whether the document is locked to prevent editing or is still being edited. You can use the controls in this group to finalize the document so that it can't be accidentally changed, or you can protect the document with a password so that only people who know the password can read the document. For more information, see Book VI, Chapter 3.
- ◆ **Prepare for Sharing:** This section highlights important information you should know about your document before you send it to others, such as a record of the edits you made as you developed the document. You can also use the Check for Issues button to find specific issues you might want to address or correct before sharing the document. For more information, refer to Book V, Chapter 3.
- ◆ **Versions:** If the document has been saved several times, you may be able to access previous versions of it from this section.



## Creating a New Document

Backstage view includes a New command that lets you create a new document. However, as I mention in Chapter 1 of this minibook, the easiest way to create a new document in Word is to simply start Word from the Start menu. Then the program creates a blank document named Document1.

When you create a new document this way, the document is based on the template named `Normal.dotm`. A *template* is simply a model document from which new documents are created. New documents based on the `Normal.dotm` template have these characteristics:

- ◆ The margins are set at 1 inch from the top and bottom and 1 inch from the left and right. If you want to change these margin settings, turn to Book III, Chapter 1.
- ◆ The text is formatted using 11-point Calibri. To change the text format, check out Book II, Chapter 2.
- ◆ The document includes a few — and by *a few*, I mean more than 100 — built-in styles you can use to format headings. (You can find 16 as quick styles and other types of text.) To discover how to work with these styles or to create your own styles, see Book II, Chapter 3.

The `Normal.dotm` template is adequate for generic types of documents, such as book reports and letters to your mom. For more specialized types of documents, you can use other templates that come with Word. Or, you can create your own templates. For more information about working with templates, see Chapter 3 of this minibook.

You can create as many such documents as your heart desires without having to worry about closing any of your other open documents. If you've already started Word, you can create a second (or third or fourth) blank document based on the Normal template in any of the following ways:

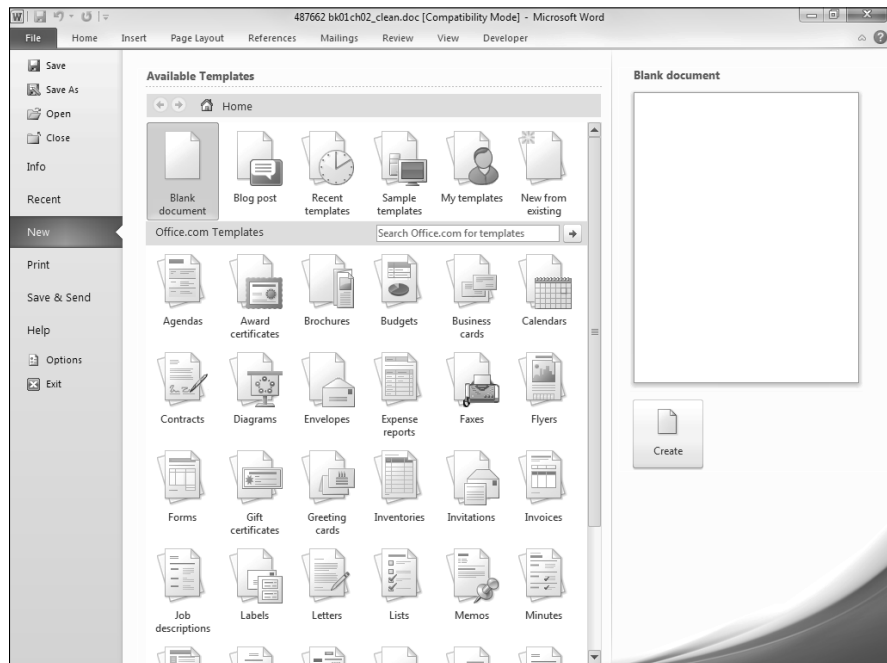
- ◆ **Press Ctrl+N.** You use this keyboard shortcut to create a new, blank document.
- ◆ **Click the New button on the Quick Access toolbar.** The New button doesn't initially appear on the Quick Access toolbar, but you can easily place it there by clicking the Customize Quick Access Toolbar button at the right end of the Quick Access toolbar. Then click New from the list of buttons that appears.
- ◆ **Choose File⇨New, and then click the Blank Document icon.** (This is the long way around, though; if you want a blank document, either of the other two methods is easier.)

After you create a new document, you can add text and other content and edit the document however you want. Then you can save the document as described later in this chapter.

If you want to create a document based on a template other than the Normal template, click the File tab to open Backstage view and then click New. This command summons the New page in Backstage view, shown in Figure 2-2.

The New page provides several alternatives to creating simple blank documents:

- ◆ **Blank Document:** Double-click this icon to create a blank document, the same as if you click the New button on the Quick Access toolbar.
- ◆ **Blog Post:** Double-click this icon to create a new post at a blogging Web site. For more information, refer to Book V, Chapter 1.
- ◆ **Recent Templates:** Click this icon to list the templates you have recently used. For more information, see Chapter 3 of this minibook.
- ◆ **Sample Templates:** Click this option to display a list of templates that are available on your computer. For more information about templates, see Chapter 3 of this minibook.



**Figure 2-2:**  
The New  
page in  
Backstage  
view.

- ◆ **My Templates:** Click this option to display a list of templates that you have downloaded from the Microsoft Web site and customized for your own use. For more information, see Chapter 3 of this minibook.
- ◆ **New From Existing:** Click this option to create a new document based on a copy of an existing document.
- ◆ **Office.com Templates:** This section of the New page lets you access templates from the Microsoft Web site.

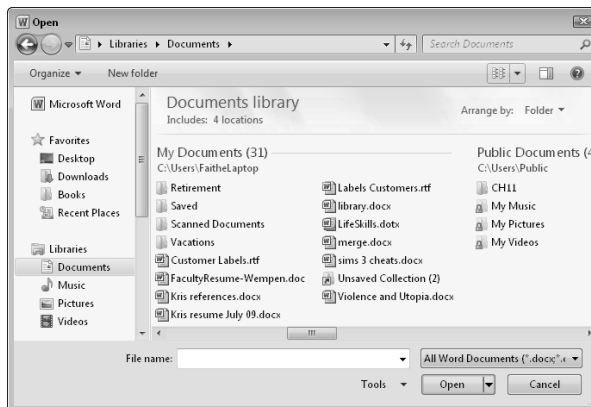
## Opening Documents

The most direct way to open a saved document is to choose File→Open. Alternatively, you can use the keyboard shortcut Ctrl+O or Ctrl+F12. Or, you can click the Open button on the Quick Access toolbar. Although this button doesn't initially appear on the Quick Access toolbar, you can easily place it there by clicking the Customize Quick Access Toolbar button at the right end of the Quick Access toolbar and then clicking Open from the list of buttons that appears.



Ctrl+O is the more intuitive keyboard shortcut for the File→Open command (O is for Open, of course), but Ctrl+F12 is left over from the early days of Windows, before Microsoft programmers decided that keyboard shortcuts make more sense. Rather than drop an antiquated and senseless keyboard shortcut in favor of one that makes sense and is consistent across all Windows applications (or at least is supposed to be), the Word developers at Microsoft decided to leave *both* keyboard shortcuts in place.

No matter which method you choose, the Open dialog box appears, as shown in Figure 2-3.



**Figure 2-3:**  
The Open  
dialog box.

One quick way to access different locations is by using the Folders pane, on the left side of the dialog box. It lists shortcuts to many common locations, including the Documents library (the default save location in Word 2010) and Computer, which you can select to browse the entire content of your system. You can also browse and navigate locations by using the Address bar, along the top of the dialog box. Click the right-pointing arrows in the path on that bar to open menus of locations, or click the left-pointing arrows (<<) at the beginning of the path to view the top level of the path.

The folder navigation method on your system may be somewhat different from the one shown and described here if you're using Windows XP. In Windows XP, you see a Look In drop-down list, as well as an Up One Level button for navigation control.



You can open more than one document at a time by selecting several files and clicking the Open button. Use one of these techniques to select several files:

- ◆ Hold down the Ctrl key while clicking the files you want to select.
- ◆ To select a range of files, click the first file in the range, hold down the Shift key, and click the last file in the range.

### *Changing views*

The Open dialog box lets you switch among several different views of your documents. A Views button near the top of the dialog box displays a menu that lets you choose the view you want.

The views available to you depend on your Windows version. (Word takes many of its settings for saving, opening, and viewing files directly from Windows.)

The available views in Windows Vista and Windows 7 are described in this list:

- ◆ **Icons (Extra Large, Large, Medium, or Small):** Shows each file as an icon, with the size of the icon dictated by the view you choose.
- ◆ **List:** Displays a list of folders and documents with small icons.
- ◆ **Details:** Displays a list of folders and documents with details, including the filename, type, size, and creation date. Headers at the top of columns are buttons; you can sort the list on any column by simply clicking the column's button.
- ◆ **Tiles:** Displays medium-size icons with filenames and file information to the right.
- ◆ **Content:** Displays a horizontal bar for each figure, including an icon and a name and file size information.

In Windows Vista and Windows 7, you can use the Preview button to toggle on or off a Preview pane in the dialog box, regardless of the chosen view.

If you have Windows XP, these views are available:

- ◆ **Thumbnails:** Displays a large icon that represents the contents of each file. For an image file, the thumbnail displays a small view of the image contained in the file. For Windows XP, Word documents don't display useful thumbnails by default, but in Windows Vista, they do.
- ◆ **Tiles:** Displays each document using large icons, with descriptive information listed to the right of each icon.
- ◆ **Icons:** Displays each document with a medium-size icon and descriptive information listed below each icon.
- ◆ **List:** Displays a list of folders and documents with small icons.
- ◆ **Details:** Displays a list of folders and documents with details, including the name, date modified, type, and size. Headers at the top of columns are buttons; you can sort the list on any column by simply clicking the column's button.
- ◆ **Properties:** Displays a panel showing various properties for the selected file, including the title, author, template, word count, and other useful information.
- ◆ **Preview:** Displays a preview of the selected file in a separate pane.

## *Deleting and renaming documents and folders*

You can delete and rename files and folders from the Open dialog box. Here's how:

- ◆ **To delete a file or folder,** select the file or folder and press Delete.
- ◆ **To rename a file or folder,** select it by clicking it once and then click the filename again. A text-editing box appears around the file or folder name, allowing you to edit the name. (Don't click it too quickly or else Word thinks that you double-clicked and the file or folder opens.)

## *Setting the default document location*

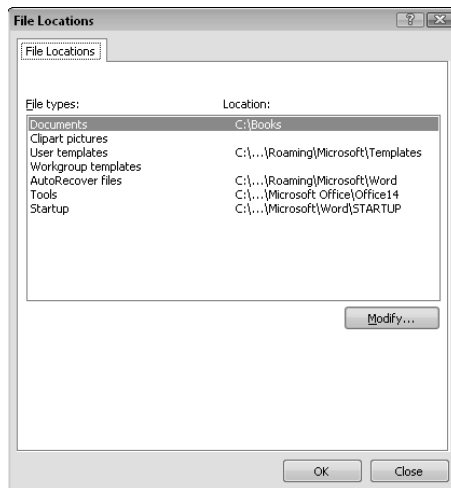
When you call up the Open dialog box, Word initially displays the contents of the folder indicated by the default Document File Location option setting. When you install Word, this option is initially set to the My Documents folder on your computer's local hard drive. However, you can change that location, if you want. For example, you might want to set up Word so that the default document location is on a network drive. To do so, follow these steps:

- 1. Click the File tab to open Backstage view and then click Options.**

The Word Options dialog box appears.

- 2. Click the Advanced tab on the left side of the Word Options dialog box.**
- 3. Use the scroll bar to scroll all the way to the bottom of the Advanced tab.**
- 4. Click the File Locations button.**

The File Locations dialog box appears, as shown in Figure 2-4.



**Figure 2-4:**  
The File  
Locations  
dialog box.

- 5. Click Documents and then click the Modify button.**

This step opens the Modify Location dialog box.

- 6. Use the Modify Location dialog box to select the new location for your documents.**

You can either type the complete path (drive letter and folder) of the location where you want to store documents in the Folder Name box or use the controls in the Modify Location dialog box to navigate to the folder.

- 7. Click OK to return to the File Locations dialog box.**
- 8. Click OK again to return to the Word Options dialog box.**
- 9. Click OK one more time to dismiss the Word Options dialog box.**

## *Using the Organize menu in Vista and Windows 7 (or the Tools menu in XP)*

If you're using Windows Vista or Windows 7, the Open dialog box contains an Organize button that opens a menu of actions and options. A Tools button near the bottom of the dialog box also opens a menu of additional options.

If you're using Windows XP, you don't have an Organize button or menu, but you have the Tools button, and some of the options that the Organize button would provide are on your Tools menu.

The commands on the Organize menu (or the Tools menu) include the ones described in this list:

- ◆ **Cut, Copy, and Paste:** Use the Clipboard to move and copy files. For example, you might cut a file from one location and then display another location and paste it.
- ◆ **Undo and Redo:** Undo (or redo) a file operation that you have performed since opening the dialog box, such as cutting or pasting.
- ◆ **Select All:** Select all files and folders in the displayed location. Ctrl+A is this shortcut.
- ◆ **Layout:** Open a fly-out menu from which you can fine-tune how the dialog box appears. For example, you can display or hide certain panes in it.
- ◆ **Delete:** Delete the document or folder. You can achieve the same result by selecting a document or folder and pressing Delete.
- ◆ **Rename:** Change the document's name.
- ◆ **Remove Properties:** Remove any personally identifiable information stored in the file's properties.
- ◆ **Properties:** Display the document's properties, the same as though you opened the document and chose Properties→Advanced Properties on the Info tab in Backstage view. I cover file properties in more detail later in this chapter.
- ◆ **Map Network Drive:** Associate a drive letter with a network folder. Don't mess with this command unless you know something about networks. This command is on the Tools menu in all Windows versions.

## *Using the Navigation pane (Favorites bar)*

The *Navigation pane* (in Windows 7) or *Favorites bar* (in Windows Vista) is the list of locations that runs down the left side of the Open dialog box. In Windows 7, it's one big pane, with expandable sections for Favorites, Libraries, Homegroup (if enabled), Computer, and Network. In Windows

Vista, the Navigation pane has a Favorite Links section at the top, followed by a Folders section from which you can browse all locations on your computer. You can also add your own favorite places to the listing (in either version).

In Windows 7, these shortcuts are available by default:

- ◆ **Desktop:** The folder that stores data directly on the Windows desktop
- ◆ **Downloads:** A folder specified for downloads within your personal folder set (for the logged-in user)
- ◆ **Recent Places:** A list of recently accessed locations
- ◆ **Libraries:** Shortcuts to the Documents, Pictures, Music, and Videos libraries that Windows 7 maintains (more on these in a minute)
- ◆ **Homegroup:** Shared locations on any computers that are part of your Homegroup network (a home networking feature in Windows 7), if enabled
- ◆ **Computer:** All drives on your local PC
- ◆ **Network:** All shared network locations available to you (not just your Homegroup)

In Windows Vista, these shortcuts are available:

- ◆ **Templates:** Templates stored on your computer
- ◆ **Recently Changed:** A list of recently used documents
- ◆ **Documents:** Your Documents folder, which is the normal location for storing documents
- ◆ **More:** Displays a menu with several additional locations

You can quickly access any of these document locations by clicking the icon on the Favorite Links bar.



You can add your own locations to the Favorites section (in Windows 7) or Favorite Links bar (in Windows Vista). To do so, summon the Open dialog box (Ctrl+O is one way) and navigate to the folder you want to add a shortcut to. Then drag the folder to the Favorites list or Favorite Links bar.

## *Using the Save As Command*

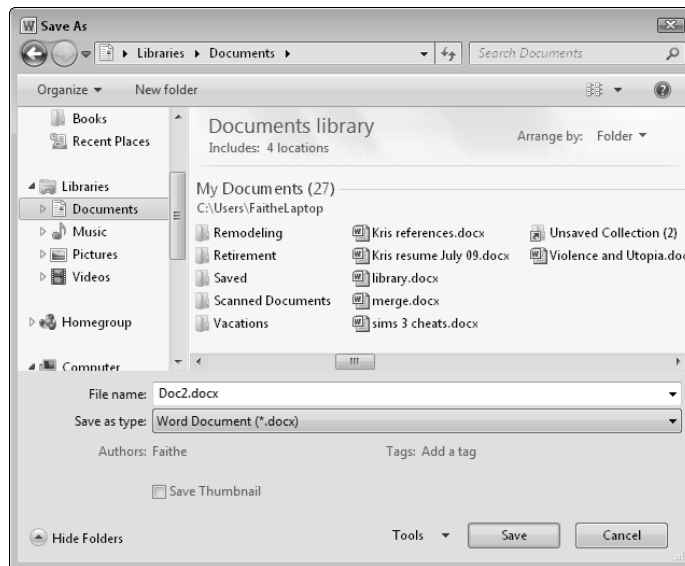
The Save As command saves a new file or an existing file under a different name. You can summon this command in two ways:

- ◆ Choose File⇨Save As.
- ◆ Press F12.



You can also invoke the Save As command by using the Save command for any document that isn't yet saved to your hard drive.

Figure 2-5 shows the Save As dialog box, displayed when you invoke the Save As command. As you can see, this dialog box shares many features and controls with the Open dialog box: the Organize button, the address bar, the navigation bar, and so on. And just like in the Open dialog box, you can change views, manage files with the commands on the Organize and Tools button menus, and so on.



**Figure 2-5:**  
The Save As  
dialog box.

In the Save As dialog box, navigate to the folder where you want to save the document, type a new name for the document, and click the Save button.

If you want to replace an existing document with the current document, double-click the document you want replaced. Word displays a dialog box asking whether you truly want to replace the document. Your choices are

- ◆ Replace existing file.
- ◆ Save changes with a different name.
- ◆ Merge changes into existing file.

You can also click Cancel to abort the entire process.

When you first call up the Save As dialog box, Word takes a wild guess that you want the text in the first paragraph of the document to be the filename.

This guess makes sense if the first paragraph is the title of the document, but in most cases, you want to type a more sensible document name.

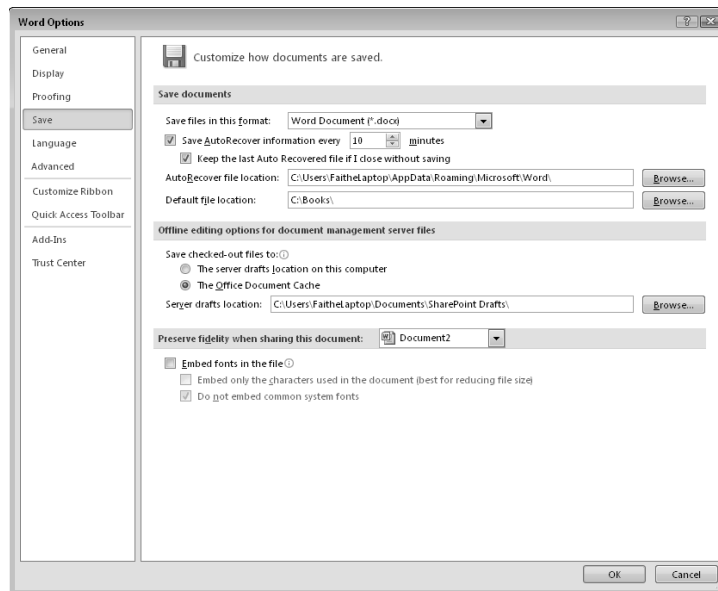
To navigate to a different save location, use the address bar at the top of the dialog box (just like using the Open dialog box) or use the Favorites bar along the left side (again, just like with Open). Click the New Folder (or Create New Folder) button if you want to create a new folder in the current location.

Notice that the Save As dialog box also includes a Save As Type drop-down list. Normally, this field is set to Word Document (\*.docx) so that documents are stored in Word format. You can change this setting to save a document in another format. For example, if you're exchanging work with someone who has only Word 2003, use the Word 97-2003 format (\*.doc).

Not all file types support all Word formatting features. Any special formatting not supported by the file type is lost when you save the file. So, if you want to save your masterpiece in one of these formats, you might want to keep a version in Word format, too.

## *Save Options*

You can set several options that affect how files are saved by clicking the File tab to summon Backstage view and then clicking Options to open the Word Options dialog box. Then click the Save tab to show the Save options, as shown in Figure 2-6.



**Figure 2-6:**  
Setting  
the Save  
options.

The following paragraphs describe what you can do by choosing each of these options:

- ◆ **Save Files in This Format:** Specify the default format for saving files.
- ◆ **Save AutoRecover Info Every *n* Minutes:** Automatically save recovery information at regular intervals. The default setting is to save the recovery information every ten minutes, but you can change the time interval, if you want.
- ◆ **AutoRecover File Location:** Using this option, set the location where you want the AutoRecover files saved.
- ◆ **Default File Location:** Set the default location for Word documents.
- ◆ **Save Checked-Out Files To:** If you're working with a document-management system such as SharePoint, use this option to specify where files should be saved when you check them out.
- ◆ **Embed Fonts in the File:** Have Word save TrueType fonts in the document file. This option increases the size of the document file but enables you to copy the file to another system without worrying about whether the other system has the fonts used in the document.

Amazingly, even though Microsoft created a separate tab for Save options, it didn't put all its Save options on the Save tab. If you switch over to the Advanced tab and scroll down a bit, you can find a Save section that includes more saving options:

- ◆ **Prompt Before Saving Normal Template:** Force Word to ask for your permission before saving changes to the `Normal.dotm` template. If you're concerned about proliferating changes to this template, select this option.
- ◆ **Always Create Backup Copy:** If you select this option, Word always saves the previous version of the document as a backup copy every time it saves the document. The backup copy uses the extension BAK.



Don't rely on the Always Create Backup Copy option as your only backup of important documents. The backup copy created by this option resides on the same drive and in the same folder as the document itself. As a result, if a hard drive failure or another type of problem renders the drive or folder inaccessible, the backup copy is inaccessible as well. Always back up important documents to a separate hard drive, flash drive, or writable CD or DVD.

- ◆ **Copy Remotely Stored Files onto Your Computer, and Update the Remote File When Saving:** Create a local copy of documents stored on network or removable drives so that they can be recovered in case you lose access to the network or removable drive.

- ◆ **Allow Background Saves:** Saves documents while allowing you to continue working. This option is activated by default. Don't change it. Just know that it's there and go about your business.

## Password-Protecting Your Files

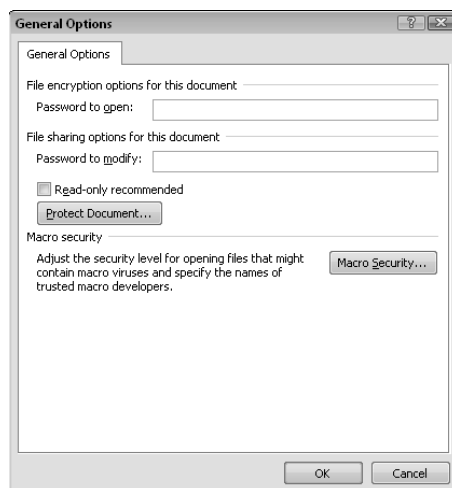
Word allows you to protect your sensitive files from snooping eyes by using passwords. You can apply two types of passwords to your documents:

- ◆ A **Password to Open** password prevents users who don't know the password from opening the file. Use this password for files you don't want unauthorized users to examine.
- ◆ A **Password to Modify** password prevents users who don't know the password from saving the file. Use this password for files you don't want unauthorized users to modify.

To password-protect a document, follow these steps:

1. **Open the document.**
2. **Choose File→Save As.**  
This step opens the Save As dialog box.
3. **Click the Tools button and then click General Options from the drop-down menu that appears.**

The General Options dialog box, shown in Figure 2-7, appears.



**Figure 2-7:**  
Setting a  
password.

4. **Type a password in the Password to Open field or the Password to Modify field (or both, if you want to provide a different password for each type of access).**

Word displays asterisks as you type the password, which prevents looky-loos from seeing your password as you type it.

5. **Click OK.**
6. **When Word prompts you to reenter the password, type it again, exactly as you did the first time.**
7. **Click OK.**
8. **Save the file.**

If you attempt, or anyone else attempts, to open a file that's password protected, Word displays a dialog box demanding the password. No password, no access.



Here are some cautionary tips for working with passwords:

- ◆ Don't forget your password! If you forget, you can't access your document.
- ◆ Don't use different passwords for every document. You'll never remember them all. Instead, use the same password for all your documents.
- ◆ Don't write down your password on a sticky note and stick it on your computer monitor.
- ◆ Don't use obvious passwords, such as your kids' names, your spouse's name, your dog's name, or the name of your boat.



To remove password protection from a file, open the file (you have to supply the password to do it), choose **File**⇨**Save As**, click **Tools**, click **General Options**, and then highlight and delete the password. Click **OK** and save the file.



# Chapter 3: Working with Templates

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## *In This Chapter*

- ✓ Discovering templates
- ✓ Enabling default settings for Word documents
- ✓ Creating documents based on a template
- ✓ Building your own templates
- ✓ Using global templates properly
- ✓ Working with the Organizer

**I**ncluding an entire chapter on Word templates near the front of a book might seem premature, but I want to impress on you from the start that understanding templates is one key to using Word as efficiently as possible. You can use Word for years without even knowing what a template is, but either your documents all look the same or you spend way too much time fiddling repeatedly with the same formatting options. Besides, the topic of the proper use of templates comes up again and again throughout this book, so I might as well get the subject of templates out in the open.

Note that the themes feature lets you easily change the appearance of documents without changing templates. For more information about working with themes, turn to Chapter 2 of Book III. However, templates still play a crucial role in the efficient use of Word because they store much more than just formatting information. And, somewhat in contrast to themes, one main strength of templates is that they help you easily create multiple documents that have a similar, if not identical, appearance.

## *Understanding How Templates Work*

A *template* is a special type of document file used as the basis for formatting your documents. Whenever you create a new document, a template file is the starting point for the new document. The following items are copied from a template into the new document:

- ♦ **Styles:** Apply paragraph and character formatting quickly. For more information about working with styles, see Book II, Chapter 3.

- ◆ **Default theme:** The theme used for the document is copied from the template. For more information, see Book III, Chapter 2.
- ◆ **Margins and other page layout information:** You can use settings such as paper size, orientation, headers, and footers.
- ◆ **Text and graphics:** A template can contain document content (text and graphics) so that every time you start a new document with that template, the content is already there. A template can be useful if you have to start every report with your company name and logo, for example.
- ◆ **Building Block entries:** Quickly insert these sections of text into your documents by simply typing a few keystrokes.
- ◆ **Macros:** Use these miniprograms to automate routine chores. For more information, see Book IX.



Each document has only one template attached to it. If you don't specify a template to attach to a new document, Word attaches the generic `Normal.dotm` template, which contains such standard styles as Normal, Heading 1, Heading 2, and Heading 3, plus default margins, keyboard shortcuts, and others. You can attach a different template to a document later, and you can copy the styles from the new template into the existing document, if you want. Then you have access to the styles from the new template as well as from the existing document.



A template is basically the same as a normal document, except that it has the extension `DOTX` or `DOTM` rather than `DOCX`, as normal documents do. The difference between `DOTX` and `DOTM` templates is that `DOTM` templates allow macros and `DOTX` templates don't.



Word permits you to open and edit templates as though they're documents, and you can easily convert a document to a template by saving it as a template rather than as a document. The real difference between documents and templates lies in how you use them.

## *Getting to Know the Normal.dotm Template*

When you create a new, blank document, Word attaches the `Normal.dotm` template to it. Word obtains the default document format, margins, and page orientation and standard styles such as Normal, Heading 1, Heading 2, and Heading 3 from the `Normal.dotm` template. In other words, `Normal.dotm` is where Word stores its default settings for any feature controlled by templates.

Computer nerds call `Normal.dotm` a *global template*, which means that it's always available in Word, whether or not the document you're working with is attached to it. (We computer nerds love to use the term *global* because we dream of dominating the world someday.) Even if you attach a different



template to a document, the settings in `Normal.dotm` are still available because `Normal.dotm` is a global template.

Any changes you make to `Normal.dotm` effectively change Word's default behavior. For example, if you don't like the default style for Heading 1 paragraphs, you can change the Heading 1 style in `Normal.dotm`. Or, you can add keyboard shortcuts to `Normal.dotm`. By making careful changes to `Normal.dotm`, you can change Word's behavior to suit your own working style. In effect, you can create your own, individualized version of Word.



You can restore your `Normal.dotm` template to its pristine condition by quitting Word and deleting the template. Then, when you restart Word, Word regenerates a standard `Normal.dotm` template. You can find the template in this folder:

`C:\Users\user\AppData\Roaming\Microsoft\Templates`

If Word discovers that the `Normal.dotm` template is missing, it reverts to its original default settings and creates a new `Normal.dotm` template. Be aware that when you delete the template, you lose everything you added to it.

## Creating a Document from an Online Template

Microsoft maintains the Office Online Web site, which has a large collection of templates you can use to create your documents. To use one of these templates, just follow these steps:

- 1. Click the File tab to summon Backstage view and then click New.**

The New page of Backstage view, shown in Figure 3-1, appears.

- 2. Select a category listed under Office.com Templates.**

The list of templates available in the category you select is displayed, as shown in Figure 3-2.

- 3. Click the template you want to use and then click the Download button.**

The template is downloaded to your computer and automatically creates a new document based on it.

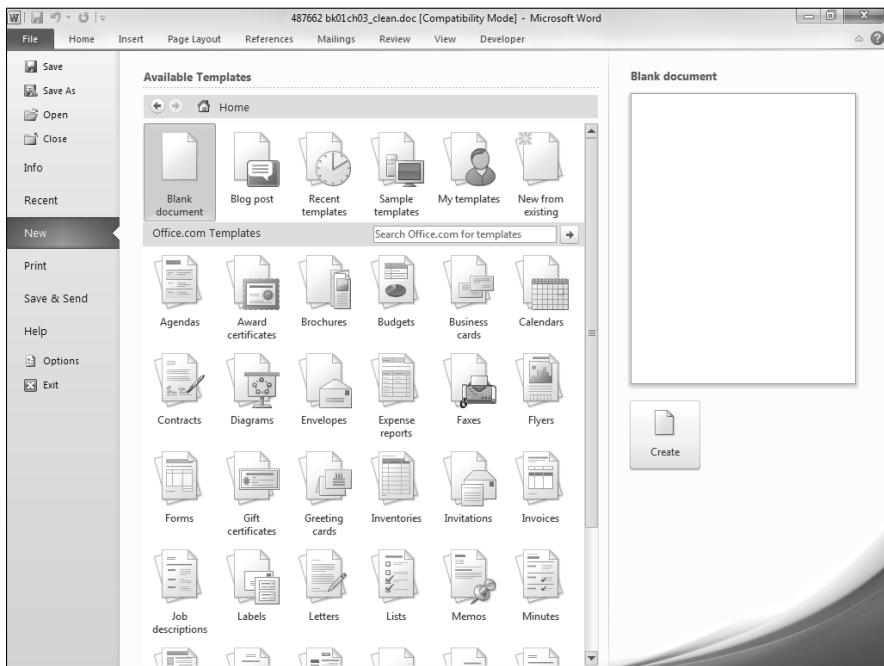
- 4. You're done.**

A new document is created from the template you selected.

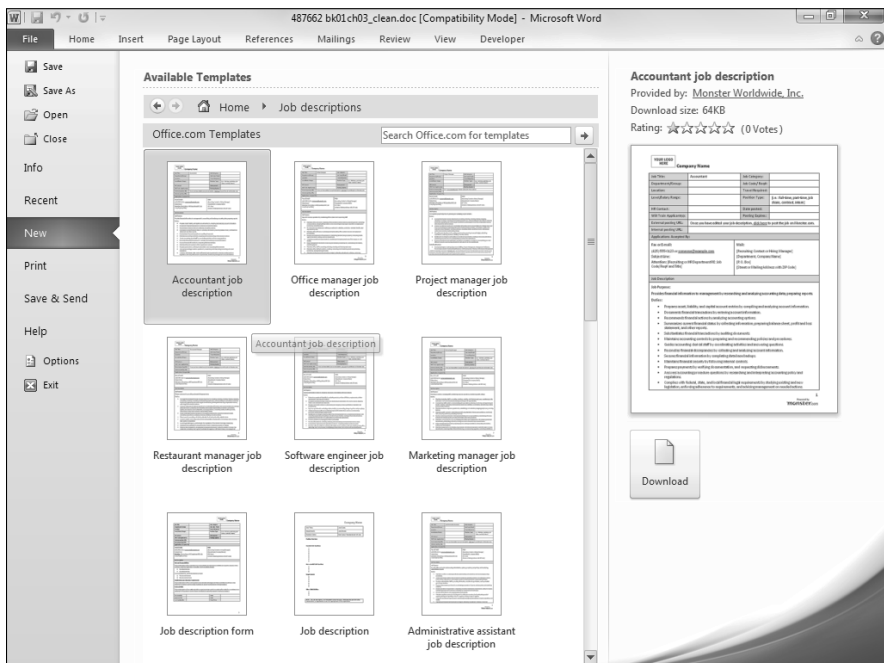
When you create a new document based on a template, any text and graphics contained in the template are automatically copied into the new document. People often use templates for this purpose to supply text or graphics that always appear in certain types of documents. Many of the templates available in Office Online include this type of text and graphics.

## 40 *Creating a Document from an Online Template*

**Figure 3-1:**  
Creating  
a new  
document  
from an  
online  
template.



**Figure 3-2:**  
Selecting  
a template  
from a  
category.



## *Creating a New Document Based on a Recently Used Template*

Word 2010 keeps track of the templates you use and makes it easy to reuse them. To reuse a template you have recently used, click the File tab to open Backstage view, click New, and then click Recent Templates. A list of templates you have used recently appears; just double-click the template you want to use to create a new document based on the template.

## *Using a Sample Template*

Word 2010 also comes with a collection of approximately 30 templates you can use. To create a document based on one of these templates, click the File tab to open Backstage view, click New, and then click Sample Templates. A list of the sample templates appears. Double-click the template you want to use.

## *Changing the Template Attached to a Document*

You can change the template attached to a document at any time. When you do, all the macros, keyboard shortcuts, as well as Building Block entries from the new template, automatically copy into the document. No boilerplate text or graphics that may be in the template are copied into the document. Styles from the template are copied into the document only if you select the Automatically Update Document Styles option when you attach the template.

### **You can't go back**

Changing the template attached to a document is one of the few Word actions that you cannot undo with the Undo command. As a result, if you inadvertently attach the wrong template to a document, correcting your error can be difficult. That's because when you attach a new template, Word copies elements from the new template into the document but doesn't remove elements from the document derived from the previous template.

To illustrate the type of problem this situation can cause, suppose that you're working on a document that has a handful of custom styles and you mistakenly attach a template that has 50 custom styles. Because you used the Automatically

Update Document Styles option, those 50 styles are copied into your document. The problem arises: How can you get rid of them? You can use the Templates and Add-Ins dialog box to attach the correct template, but the 50 styles copied in from the incorrect template remain in your document! And you can't remove them easily.

To avoid this type of problem, save your document immediately before changing templates. Then, if you're not satisfied with the results after attaching the new template, you can revert to the previously saved version of the document if necessary by closing the document without saving changes and reopening the previously saved copy of the document.

To change the template attached to a document, follow these steps:

1. **Click the File tab to open Backstage view and then click Options.**

The Word Options dialog box appears.

2. **Select Add-Ins from the list of categories on the left side of the Word Options dialog box.**

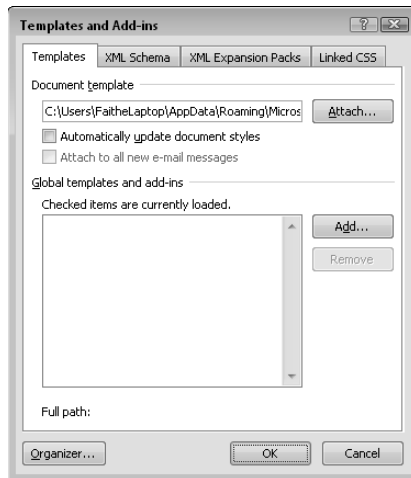
The Add-Ins options screen appears.

3. **Select Templates in the Manage drop-down list and then click the Go button (found near the lower-left corner of the dialog box).**

This step opens the Templates and Add-Ins dialog box, shown in Figure 3-3.



If the Developer tab on the Ribbon is visible, you can skip Steps 1 through 3. Instead, just click the Document Template button on the Developer tab to display the Templates and Add-Ins dialog box. For more information, see the later section “Activating the Developer Tab on the Ribbon.”



**Figure 3-3:**  
The  
Templates  
and Add-Ins  
dialog box.

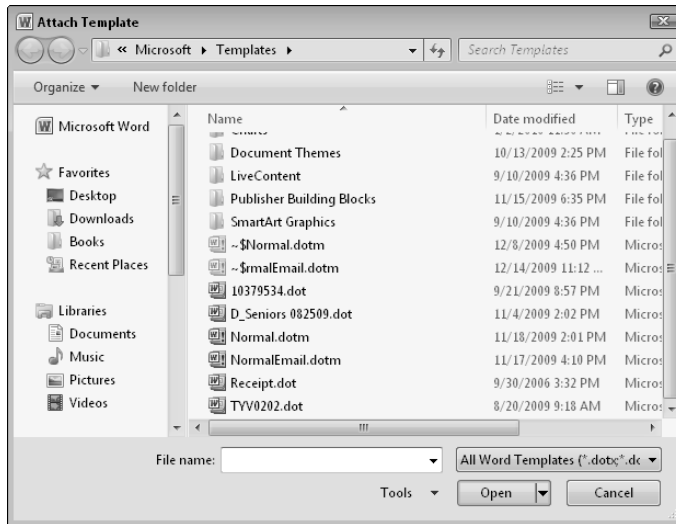
4. **Click the Attach button.**

This step opens the Attach Template dialog box, shown in Figure 3-4.

5. **Select the template you want to attach to the document and then click Open.**

You might have to look in various folders to find the template you want to attach. When you click Open, you return to the Templates and Add-Ins dialog box.

**Figure 3-4:**  
Attaching a  
template.



6. If you want the styles from the template you're attaching to replace the styles in your document, make sure that the **Automatically Update Document Styles** check box is selected.

You usually want to select this check box because the most common reason to change templates is to switch to the styles offered by the other template.

7. Click **OK** to attach the template.

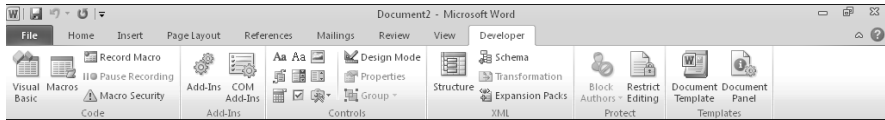
If you update styles and your document uses styles to control its formatting, the effects of the new template are immediately visible.

## Activating the Developer Tab on the Ribbon

If you plan to work much with templates, you can simplify your life by revealing the Developer tab on the Ribbon. This tab includes a Document Template button, which provides direct access to the Templates and Add-Ins dialog box, eliminating the need to wade through the Word Options dialog box as described in the preceding section.

To display the Developer tab, choose **File**➤**Options**, click **Customize Ribbon**, and from the list of tabs on the right side, select the **Developer** check box. Then click **OK**. Figure 3-5 shows Word with the Developer tab open.

**Figure 3-5:**  
The  
Developer  
tab.



## *Creating Your Own Templates*

Word comes with a collection of templates that let you create a wide variety of document types, but sooner or later you'll almost certainly want to create your own templates. The sections that follow explain everything you need to know about creating and using your own templates.

### *Converting a document to a template*

Suppose that you've been working on a document for hours, toiling over its formats until they're just the way you want them, and you realize that you might want to create other documents using the same formats. Creating a template from this document is a simple matter.

Open the document you want to use to create the template and choose File→Save As to open the Save As dialog box. At the bottom of the Save As dialog box is a Save As Type drop-down list. The default setting is Word Document. Change this field to Word Template or Word Macro-Enabled Template, depending on whether you want to include macros in the template. Type a name for your template, navigate to the folder where you want to save the template, and click Save to save the document as a template.



Before you save your document as a template, take a few moments to improve the template's usefulness. Follow this list of guidelines:

- ◆ **Remove unnecessary text.** Any text you leave in the template appears in any new documents you create with the template.
- ◆ **Perfect boilerplate text.** Leave only true boilerplate text that you want to appear in every document based on the template, and make sure that this boilerplate text is exactly as you want it.



To delete all text from the document, press Ctrl+A to select the entire document and then press Delete.

- ◆ **Remove any unnecessary styles or macros or other elements that aren't template-worthy.** Leave only the elements you want to be included in documents created from your template.



You might be tempted to open the document, delete text and other unnecessary elements, and then save the document. I caution you against this strategy, though, because you can easily delete an entire document's worth of text and accidentally using Save rather than Save As! To avoid this disaster, save the document as a template before you begin deleting massive amounts of text.

### ***Creating a new template from scratch***

To create a new template from scratch, choose File⇨New and select My Templates. Select the template you want use as the starting point for your new template. In the lower-right corner of the dialog box, you can see a set of radio buttons that let you indicate whether you want to create a new document or a new template. Select the Template option and then click OK.

Your new template inherits the styles, text, and other elements contained in the template you based it on. Now is the time to add any more styles, macros, or other new elements to the template or to change existing template elements. In addition, you can add boilerplate text and graphics. When you're ready, use the Save command to save the template, assigning it an appropriate name and placing it in the correct folder.

## **Boring details about where to store templates**

By default, Word stores its templates in the folder named `C:\Users\user\AppData\Roaming\Microsoft\Templates`. But you can change the location where templates are stored by choosing File⇨Options, clicking the Advanced tab, and then clicking the File Locations button. Then double-click the User Templates option.

You can also specify a location for *workgroup templates*, which are templates you access via a network. Workgroup templates come in handy if you and other network users need to share a set of common templates. In that case, place the common templates on a network file server and then use the Workgroup Templates option on the File Locations tab to indicate the location of the shared templates.

When you create your own templates, you usually store them in the `C:\Users\username\AppData\Roaming\`

`Microsoft\Templates` folder, and they appear on the default Personal Folders tab when you create a new document based on a template with the My Templates option. You can create new folders within that location, and place templates into them, to create additional tabs in that dialog box. This strategy is helpful if you have a lot of templates to keep organized.

*The Trusted Locations* feature in Word 2010 lets you designate certain folders as trusted, which means that documents and templates opened from those locations are considered safe by Word. You may want to designate your user template folder as a trusted location. To do so, choose File⇨Options, click the Trust Center tab, and click the Trust Center Settings button. This action opens a dialog box that lets you designate a folder as a trusted location.

### *Modifying an existing template*

To modify an existing template, choose File⇨Open to call up the Open dialog box. Change the Files of Type list box from Word Documents to Word Templates (or All Word Templates, if you want to include templates from Word 97-2003) and locate and select the template you want to modify. Click Open to open the template, make any changes you want to make, and choose File⇨Save to save the changes. That's all there is to it.

Another way to modify an existing template is to open a document based on the template and change those elements of the document stored in the template rather than in the document. This method is a bit confusing, however: Some elements of a document are stored only in the template, whereas other elements are copied from the template at the time the template is attached and subsequently stored in the document.

The following list indicates how changes to various elements of a document affect the template attached to the document:

- ◆ **Text:** No text you add to the document affects the template. The only way to change boilerplate text in a template is to edit the template directly.
- ◆ **Direct formatting:** Any direct formatting you apply to the document affects only the document and isn't copied back to the template.
- ◆ **Styles:** When you modify a style, you have the option to apply the change to styles in the current document or to styles in the template. If you apply the change only to the document, the change doesn't affect other documents created from the template.
- ◆ **Macros:** Macros are always stored in a template, so any macros you create or modify are stored in the template, not in the document itself. When you create a macro, you must indicate whether you want the macro stored in `Normal.dotm`, the attached template, or another global template.
- ◆ **Customizations:** Changes to custom keyboard shortcuts are stored in the template. You must specify whether you want the change stored in `Normal.dotm`, the attached template, or a global template.
- ◆ **Building Blocks:** Changes to Building Blocks are also stored in the template, either `Normal.dotm`, the attached template, or a global template.

## *Using Global Templates*

A *global template* is a template with macros, Building Blocks, and customized keyboard shortcut elements available to all open documents regardless of which template is attached to the document. `Normal.dotm` is a global



template, which means that its elements are available even in documents attached to another template. You can add your own templates to the list of global templates, if you want, so that their elements also are available globally.

Note that only the macros, Building Blocks, and customization settings in a global template are available to other documents. Styles and boilerplate text contained in global templates aren't available (unless the document happens to be attached to the template).



A global template is a helpful way to create a library of customized macros. You can place all your macros in the `Normal.dotm` template, but placing them in a separate template for global macros gives you some added flexibility. For example, you can exchange your global macro template with other users without worrying about overwriting their `Normal.dotm` templates. And, you can quickly remove all custom macros by removing the global macro template without losing other custom items in your `Normal.dotm`.

Follow these steps to activate a global template:

**1. Choose File➦Options.**

The Word Options dialog box appears.

**2. Select Add-Ins from the list of categories on the left side of the Word Options dialog box.**

The Add-Ins options screen appears.

**3. Select Templates from the Manage drop-down list and then click the Go button.**



This step opens the Templates and Add-Ins dialog box (refer to Figure 3-3).

If the Developer tab is open, you can skip Steps 1 through 3 and just click the Document Template button on the Developer tab.

**4. Locate the Global Templates and Add-Ins list box.**

It contains a list of all available global templates, along with buttons to add or remove global templates.

**5. Click the Add button.**

The Add Templates dialog box appears.

**6. Select the template that you want to make global and then click OK.**

When you return to the Templates and Add-Ins dialog box, the template you chose appears in the Global Templates and Add-Ins list box.

**7. Click OK.**

You're done.



## Stop me before I tell you about the Startup folder

When you add a template to the Global Templates and Add-Ins list, the template remains in the list every time you start Word. However, you must use the Templates and Add-Ins dialog box and select the check box next to the template in the list to make the template global. If you don't want to do that every time you start Word, follow these steps:

1. **Close Word.**
2. **Open a Computer window (choose Start→Computer in Windows Vista or 7; Start→My Computer in Windows XP). Navigate to the folder that contains the template you want to make global.**
3. **Open a second Computer window. In it, double-click the C drive and then navigate to the C:\Program Files\Microsoft Office\Office 14\Startup folder.**

4. **Drag any templates that you want to be global from the template folder to the Startup folder. Use the right mouse button to drag the template.**

When you release the right mouse button, a pop-up menu appears.

5. **Choose the Create Shortcuts Here command.**
6. **Close both Computer windows and then start Word.**

Any template files in the C:\Program Files\Microsoft Office\Office 14\Startup folder automatically load and are made global. If you previously added the template to the Global Templates and Add-Ins list, remove it before following this procedure.



Check out these tidbits about global templates:

- ◆ To disable a global template temporarily, open the Templates and Add-Ins dialog box and deselect the template's check box in the Global Templates and Add-Ins list box. To remove the template from the list, select it and click the Remove button.
- ◆ After you make a template global, it remains global until you quit Word. The next time you start Word, the template is included in the Global Templates and Add-Ins list box, but its check box is deselected so that it isn't active. To activate the template to make it global, open the Templates and Add-Ins dialog box and select the template's check box. See the earlier sidebar "Stop me before I tell you about the Startup folder" to find out how to set up a global template that's active every time you start Word.

## How Word Resolves Duplicate Template Elements

When you use global templates, you face the possibility of creating duplicate template elements. For example, a global template might have a macro named `CopyStyle` and the template attached to the document might also have a macro named `CopyStyle`. Which one takes precedence?

The following order of precedence (from highest to lowest) determines which template elements to use when name conflicts occur:

- ◆ **The document itself always has first priority.** Any element defined directly in the document supersedes any like-named elements in any templates.
- ◆ **The template attached to the document is second.** Any element defined in the attached template supersedes any like-named elements in `Normal.dotm` or a global template.
- ◆ **The `Normal.dotm` template is next.** Any element that exists in `Normal.dotm` takes precedence over a like-named element in another global template.
- ◆ **Global templates are last.** Elements from global templates are used only if the attached template and `Normal.dotm` don't have a like-named element.

If two or more global templates have identically named elements, Word uses the one that's first alphabetically. For example, if both `Global Template` and `My Global Macros` are loaded as global templates and contain a macro named `CopyStyle`, Word uses the one from `Global Template`.

## Using the Organizer

If you want to move styles *en masse* from one document or template to another, the easiest way is to use the Organizer — the tenacious Word tool for taming templates. The Organizer is especially useful when you create several new styles in a document and you want to copy those files to the document's template.

To copy styles from your document to a template, follow these steps:

### 1. Open the Templates and Add-Ins dialog box.

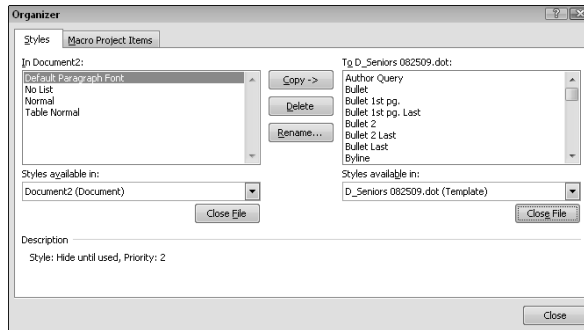
You can do that by choosing `File`➔`Options`, clicking the `Add-Ins` tab, choosing `Templates` in the `Manage` drop-down list, and clicking `Go`. Or,

if the Developer tab is visible on the Ribbon, click the Developer tab and then click the Document Template button in the Templates group. The Templates and Add-Ins dialog box appears. Refer to Figure 3-3.

## 2. Click the Organizer button.

The Organizer dialog box, shown in Figure 3-6, appears.

**Figure 3-6:**  
The  
Organizer  
dialog box.



## 3. (Optional) If you want to copy styles to a template other than Normal.dotm, click the right Close File button, click the Open File button, select the template file, and click Open.

## 4. Choose the styles you want to copy in the left style list (the In list box).

To choose several styles, hold down the Ctrl key while clicking style names. To choose a block of styles, click the first style in the block and then hold down the Shift key and click the last style.

## 5. Click the Copy button.

The styles copy from the document to the template.

## 6. Click the Close button.

The Organizer dialog box is a helpful beast:



- ◆ You can copy styles from either list in the Organizer dialog box. If you select styles in the right box, the In and To designations switch and the arrows on the Copy button change to indicate that styles copy from the right list to the left list.
- ◆ To move styles from the current document to Normal.dotm, skip Step 3 in the preceding step list.



- ◆ Click the down arrow next to the Styles Available In list box on the left side of the Organizer dialog box to reveal a list of style sources that includes the current document, the attached template, and `Normal.dotm`. To move styles from the attached template to `Normal.dotm`, select the template from the Styles Available In list.
- ◆ You can also use the Organizer to delete or rename styles. To delete styles, select them in either the left or right list; then click the Delete button. If you've been good, Word asks for confirmation before it deletes the styles. To rename a style, select it and click the Rename button. When Word asks for a new name, start typing. (Notice that you can rename only one style at a time.)



# Chapter 4: Printing Your Documents

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## *In This Chapter*

- ✓ **Printing a document**
- ✓ **Playing with print options**
- ✓ **Previewing your output**

**T**he Print command. The Printmeister. Big document comin' up. Printin' some pages. The Printorama. The Mentor of de Printor. Captain Toner of the Good Ship Laseroo.

Don't worry — when you print a Word document, no one's waiting to ambush you with annoying nicknames such as the ones doled out by Rich the copy guy in the old *Saturday Night Live* skit. You see just a handful of boring dialog boxes with boring check boxes. Point-point, click-click, print-print.



Note that many printing features described in this chapter — such as collating or scaling — duplicate features provided directly by some printers. If your printer has a feature that duplicates a feature in Word, you should almost always use your printer's feature rather than Word's. That's because your printer can provide these features more efficiently than Word can. To find out which features your printer has, click the Printer Properties link on the Print page in Backstage view.

## *Printing the Quick Way*

Back in the good old days, before Microsoft replaced menus and toolbars with the Ribbon, a handy Print button lived right on the Standard toolbar. It was the quickest way to print a single copy of your document on your favorite printer.

Now that the menus and toolbars of old have been supplanted by the Ribbon, you can't find a handy Print button sitting in plain view. But wait! A Print button is lying in wait on the Customize menu of the Quick Access toolbar, waiting for you to bring it to the top. I suggest that you do so immediately, by following these steps:

1. Click the **Customize Quick Access Toolbar** button, on the far right end of the **Quick Access toolbar**.

This step reveals a menu of commonly used commands.



2. Click the **Quick Print** button, shown in the margin.

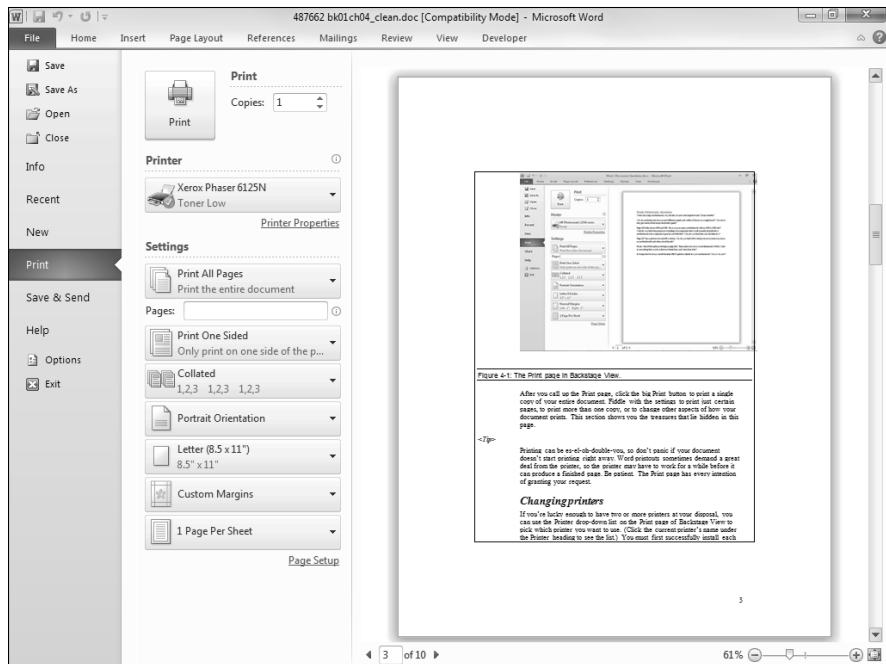
This step adds the Quick Print button to your Quick Access toolbar.

Now the Quick Access toolbar contains the Quick Print button, which prints your document using the current print settings and which I explain in the remaining sections of this chapter. Usually, this action results in printing a single copy of every page in your document. But if you alter print settings, clicking the Quick Print button uses the altered settings automatically.

## *Printing from Backstage View*

For precise control over how your document prints, you must conjure up the Print page in Backstage view, as shown in Figure 4-1. To summon this page, choose **File**⇨**Print** or press **Ctrl+P**.

**Figure 4-1:**  
The Print  
page in  
Backstage  
view.





After you call up the Print page, click the big Print button to print a single copy of your entire document. Fiddle with the settings to print just certain pages, to print more than one copy, or to change other aspects of how your document prints. This section shows you the treasures that lie hidden in this page.



Printing can be es-el-oh-double-you, so don't panic if your document doesn't start printing right away. Word printouts sometimes demand a great deal from the printer, so the printer may have to work for a while before it can produce a finished page. Be patient. The Print page has every intention of granting your request.

### ***Changing printers***

If you're lucky enough to have two or more printers at your disposal, you can use the Printer drop-down list on the Print page of Backstage view to pick which printer you want to use. (Click the current printer's name under the Printer heading to see the list.) You must first successfully install each printer in Windows — a topic beyond the reach of this humble book but one that you can find plenty of information about in the appropriate version of Andy Rathbone's *Windows For Dummies*.

### ***Printing more than one copy***

The Copies box on the Print page lets you print more than one copy of your document. You can click one of the arrows next to this field to increase or decrease the number of copies, or you can type directly in the box to specify the number of copies.

A ways down the Print page is the Collate setting, which lets you choose between collated and uncollated printing. If you chose collated printing (the default setting), Word prints each copy of your document one at a time. In other words, if your document consists of ten pages and you select three copies and select collated printing, Word first prints all ten pages of the first copy of the document, and then all ten pages of the second copy, and then all ten pages of the third copy. If you choose uncollated printing, Word prints three copies of the first page, followed by three copies of the second page, followed by three copies of the third page, and so on.



The Collated option saves you from the chore of manually sorting your copies. If your document takes forever to print because it's laden with heavy-duty graphics, however, you can probably save time in the long run by using uncollated printing. Why? Because many printers are fast when printing a second or third copy of a page. The printer may spend ten minutes determining how to print a particularly complicated page, but after it

figures it out, the printer can print additional copies in ten seconds each. If you print collated copies, the printer must labor over each page separately for each copy of the document that it prints.

### ***Printing part of a document***

The Print All Pages drop-down list lets you choose how much of (or what part of) your document you want to print. When you first access the Print page in Backstage view, the Print All Pages option is selected so that your entire document prints. You use the other options in the Print All Pages drop-down list, as well as the Pages box just below it, to tell Word to print distinct portions of your document:

- ◆ **Print Selection:** Print just the portion of the document you selected before entering Backstage view. First, select the pages you want to print. Then choose File⇨Print, select Print Selection from the Print All Pages drop-down list, and click Print.
- ◆ **Print Current Page:** Print just the current page. Before you display the Print page, move to the page in your document that you want to print. Then select this option in the Print page of Backstage view and click Print. This option is handy when you make a change to one page and don't want to reprint the entire document.
- ◆ **Print Range:** Select specific pages for printing. You can print a range of pages by typing the beginning and ending page numbers, separated by a hyphen, as in *5-8* to print pages 5, 6, 7, and 8. Or, you can list individual pages, separated by commas, as in *4,8,11* to print pages 4, 8, and 11. And, you can combine ranges and individual pages, as in *4,9-11,13* to print pages 4, 9, 10, 11, and 13. Use the Pages box to specify the pages you want to print. Entering page numbers in the Pages box automatically changes the drop-down list setting to Print Range if it wasn't already so.
- ◆ **Document Properties:** Print information about your document.
- ◆ **List of Markup:** Print a list of revisions made to the document.
- ◆ **Styles:** Print the styles in the document.
- ◆ **AutoText Entries:** Print any AutoText entries in the document.
- ◆ **Key Assignments:** Print any custom shortcut keys that are assigned.
- ◆ **Print Markup:** You can enable the Track Changes feature and then use this option to print your document along with any revision marks.
- ◆ **Only Print Odd Pages:** Print pages 1, 3, 5, and so on.
- ◆ **Only Print Even Pages:** Print pages 2, 4, 6, and so on.

Select the type of output you want to print and then click Print or press Enter. Off you go!

## Other settings

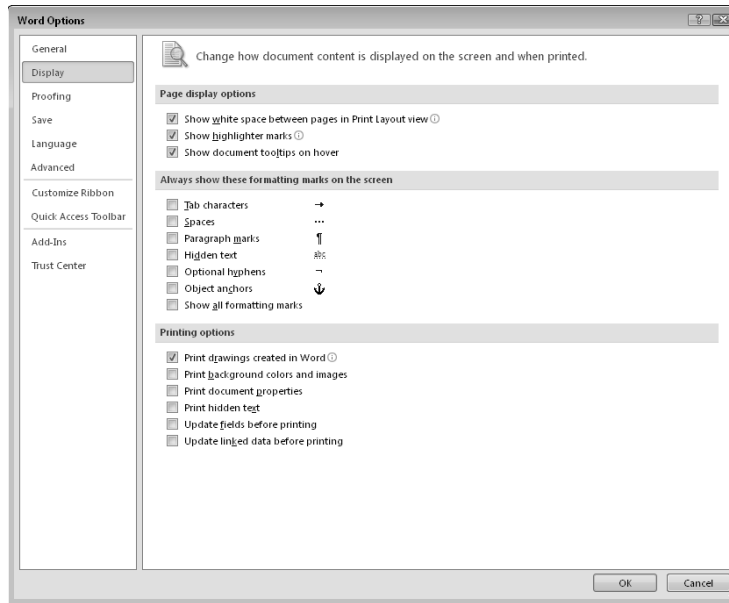
The Print page of Backstage view has several other options worth considering:

- ◆ **Print One Sided:** Most printers print on only one side of the paper. This option lets you manually print on both sides of the paper, if you want. If you choose to print manually on both sides of the paper, Word prompts you to reinsert each page to print the next page on its backside.
- ◆ **Collated:** As described earlier in this chapter, this option is useful when printing multiple copies of a document.
- ◆ **Portrait Orientation:** *Portrait* orientation refers to printing on the paper so that the longest side of the paper is the height and the shorter side is the width. *Landscape* orientation flips the page so that the long side is the width and the short side is the height.
- ◆ **Letter:** Change the paper size. The default is usually Letter (8.5 x 11), but you can select different paper sizes.
- ◆ **Margins:** You can change the margin settings from the Print page.
- ◆ **1 Page Per Sheet:** Print more than one page on each sheet of paper. This option is especially useful for creating quick proof pages to ensure that your document is laid out properly. This option is also useful if your document consists mostly of large text that's still readable when reduced 50 percent or more. You can also select *Scale to Paper Size* to adjust the size of the printed output to fit the paper in the printer.
- ◆ **Page Setup:** This unobtrusive hyperlink near the bottom of the page opens the Page Setup dialog box, from which you can adjust the document margins again before you print.

## Playing with print options

Several options that affect printing are found in the Options dialog box, which you can reach from Backstage view by clicking the Options button. Printing options are on both the Display tab and the Advanced tab of the Options dialog box.

Figure 4-2 shows the Display tab of the Options dialog box, which contains a section of printing options.



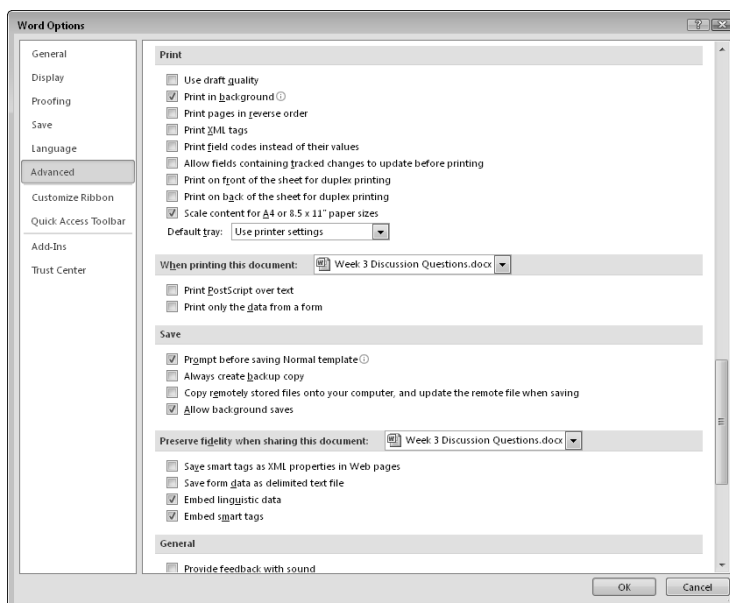
**Figure 4-2:**  
The basic  
print  
options.

The following options are listed in the Printing Options section of the Display tab:

- ◆ **Print Drawings Created in Word:** Prints drawing objects.
- ◆ **Print Background Colors and Images:** Prints background colors and images. These options are disabled by default because using colored paper is easier and cheaper than printing color backgrounds.
- ◆ **Print Document Properties:** Prints document properties on a separate page following the document.
- ◆ **Print Hidden Text:** Prints all hidden text.
- ◆ **Update Fields Before Printing:** Updates all document fields before printing the document.
- ◆ **Update Linked Data Before Printing:** Updates any linked information in the document before printing it.

You can find additional printing options in the Print and When Printing This Document sections of the Advanced tab in the Word Options dialog box, shown in Figure 4-3.

**Figure 4-3:**  
Advanced  
printing  
options.



The following list describes what you can do by using the options you can find in the Print section of the Advanced tab:

- ◆ **Use Draft Quality:** Prints the document in draft format with little formatting. This option might result in slightly faster printing. But if you're concerned with print speed, I recommend that you use your printer's built-in draft mode instead. Most ink-jet printers have a draft mode feature that prints dramatically faster than normal mode. You can find this option by clicking the Printer Properties link on the Print page in Backstage view.
- ◆ **Print in Background:** Prints documents in the background so that you can continue working while the document prints. This option is activated by default, so you don't need to worry about it. If you turn off this option, Word refuses to do anything else while it's printing.
- ◆ **Print in Reverse Order:** Prints the document backward, starting with the last page in your document. This option is useful for printers that stack pages backward in the output tray. By printing the document backward, the pages stack in the correct order.
- ◆ **Print XML Tags:** Prints any XML tags in the document.
- ◆ **Print Field Codes Instead of Their Values:** Prints field codes rather than field results. Use this option only if your document is filled with fields and you're trying to figure out why they aren't working right.

- ◆ **Allow Fields Containing Tracked Changes to Update before Printing:** Allows fields to be updated before printing. If you're using revision marks to track changes and have changed the content of a field, you might want to show the new value in that field rather than in the old (tracked) one.
- ◆ **Print on Front of the Sheet for Duplex Printing:** Sets the order of pages on the front of each sheet. Normally, the odd-numbered pages are printed in order at the top of each page. Select this option to reverse the print order of the odd-numbered pages.
- ◆ **Print on Back of the Sheet for Duplex Printing:** Reverses the print order of even-numbered pages. Normally, even-numbered pages are printed in order on the back of each page.
- ◆ **Scale Content for A4 or 8.5 x 11" Paper Size:** Automatically adjusts your document to fit the paper size.
- ◆ **Default Tray:** Tells the printer to use its default tray.

You can also find two options listed in the When Printing This Document section:

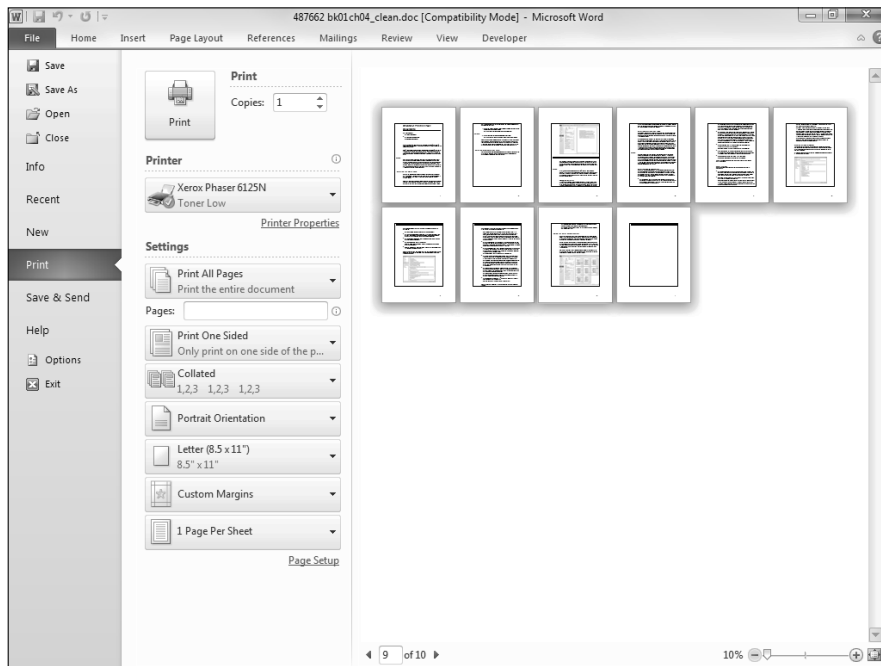
- ◆ **Print PostScript Over Text:** An option that's important only if you're converting documents from Macintosh Word format.
- ◆ **Print Only the Data From a Form:** Prints the data entered into a form but not the form itself.

## *Using the Print Preview Feature*

The Print Preview feature lets you see how your pages will appear before committing them to paper. To use the Print Preview feature, just choose the **File**⇨**Print** command. Your previewed pages display on the Print page of Backstage view. Refer to Figure 4-1 if you don't believe me.

Beneath the print preview area are a couple of controls for manipulating the preview. Specifically, you find a set of navigation controls that let you scroll forward or backward through the document one page at a time. And you find a zoom control that lets you zoom in to see more detail or zoom out to see the big picture.

Note that if you zoom out far enough, Word displays multiple pages in the preview area. For example, Figure 4-4 shows a print preview of this chapter zoomed out far enough to see all ten of its pages.



**Figure 4-4:**  
The Print  
Preview  
feature  
can show  
multiple  
pages at a  
time.





# Chapter 5: Help!

---

## *In This Chapter*

- ✓ Accessing help
- ✓ Finding help that holds your hand
- ✓ Searching for specific help topics
- ✓ Getting help on the Internet

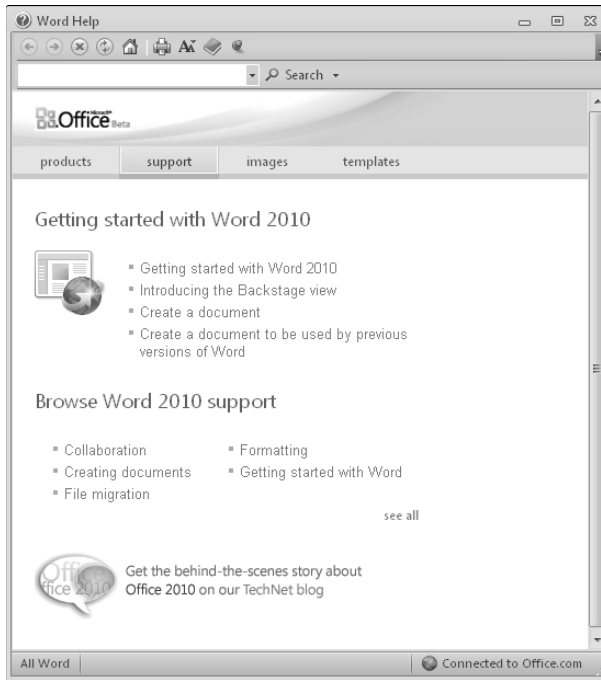
**T**he ideal way to use Word is to have an expert sit patiently at your side and answer your every question with a straightforward answer, gently correcting you when you make silly mistakes and otherwise minding his own business. All you have to do is occasionally toss the expert a Twinkie and let him go outside once a day.

Short of that, the next best method is to find out how to coax Word itself into giving you the answers you need. Fortunately, Word includes a nice built-in help feature that can provide the answers you're looking for. No matter how deeply you're lost in the Word jungle, help is never more than a few clicks or keystrokes away.

## *Several Ways to Get Help*

As with everything else in Office, more than one method is available for calling up help when you need it. The easiest thing to do is yell "Ski-i-pper!" in your best Gilligan voice. Otherwise, you have these options:

- ♦ **Press F1 at any time.** If you press F1 when you're in the midst of doing something, odds are good that Word offers suggestions for help with just the task you're trying to accomplish. This slick little bit of wizardry is its *context-sensitive help*.
- ♦ **Click the Help button located just above the right edge of the Ribbon.** This action activates Word's main Help system, shown in Figure 5-1.
- ♦ **Click the question mark button in the upper-right corner of any dialog box.** You receive help that's specific to the dialog box.



**Figure 5-1:**  
Help!

- ◆ **Hover the cursor over an item on the Ribbon.** A ScreenTip bubble appears and explains what the item does. Many ScreenTips include the phrase “Press F1 for more help.” In that case, you can press F1 to find help specifically about that item.
- ◆ **Choose File⇨Help.** This command opens a page in Backstage view from which you can access the main Help system (by clicking Microsoft Office Help), find product support options, and more.

## *Finding Your Way around the Help System*

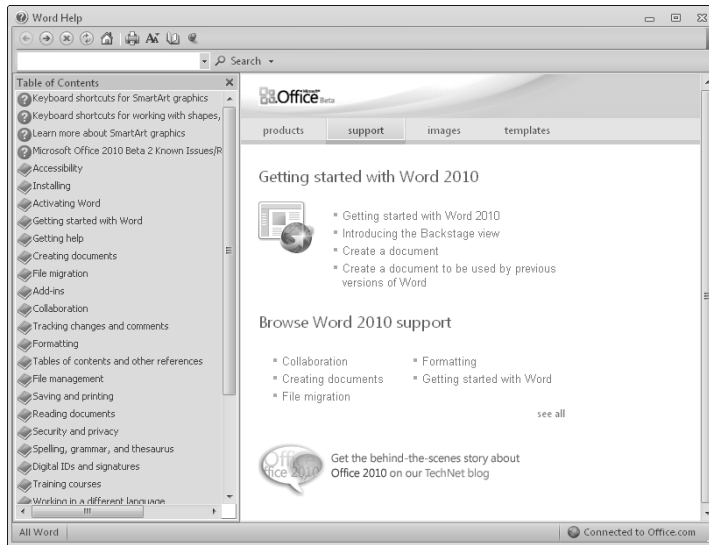
The Word Help window (refer to Figure 5-1) offers several ways to access the help you need. The following list describes the various ways you can work your way through Word’s Help feature:

- ◆ **Word Help window links:** You can click any links that appear in the Word Help window to display help on a particular topic. For example, if you click the Getting Started with Word 2010 link, you find a page of useful information about the basic features of Word 2010.

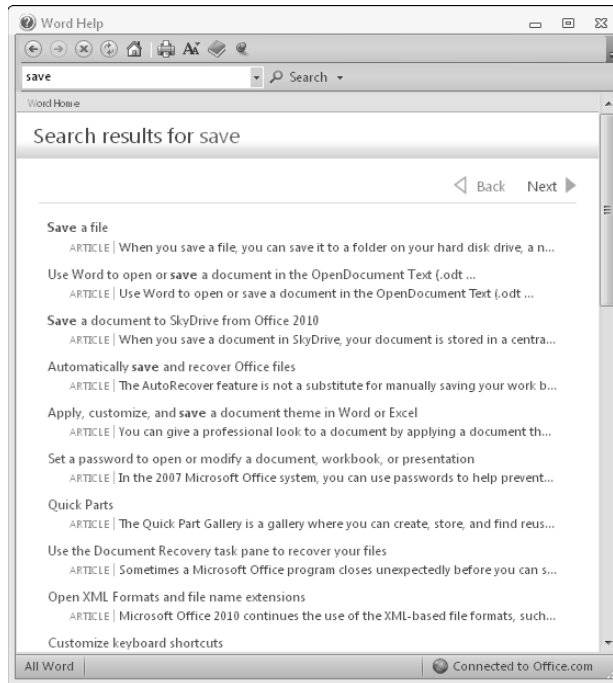


- ◆ **Show Table of Contents button:** You can click the Show Table of Contents button (shown in the margin) to display the table of contents, which gives you an organized overview of the various help topics. (See Figure 5-2.) You can then use the table of contents to access specific topic pages.

**Figure 5-2:**  
Displaying  
the table of  
contents.



- ◆ **Search feature:** If you can't find what you're looking for, try entering a word or phrase in the Search text box and clicking the Search button. A list of topics pertaining to the word or phrase you entered appears. For example, Figure 5-3 shows the results of a search for the word *save*.
- ◆ **Pushpin icon:** By default, the Help window is always displayed on top of other windows. In many cases, this "helpful" feature obscures your access to the Word window. If you don't want the Help window to always stay on top, you can click the pushpin icon. Then the Word Help window minimizes like any other window.
- ◆ **Back button:** You can retrace your steps by clicking the Word Help window's Back button. You can use the Back button repeatedly, retracing all your steps if necessary.
- ◆ **Forward button:** If you have used the Back button, you can then use the Forward button to return to where you were before you clicked Back.



**Figure 5-3:**  
Search  
results.

## *Getting Help on the Internet*

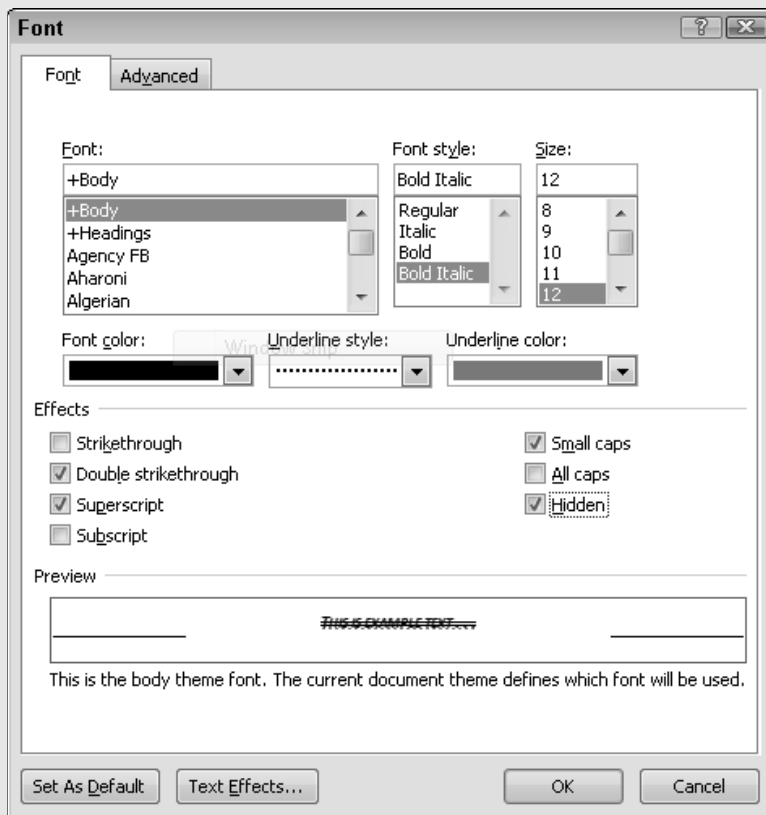
When you access the Help system in Word while your computer has an active Internet connection, Help information is automatically pulled in from the Web, with no extra effort on your part. Just enjoy it. Even more information about Word is available from the Microsoft Web site at <http://office.microsoft.com>. Point your Web browser to the site and explore.

Word itself also has some links and pointers to specific online content and services. Check out some of them at your leisure:

- ◆ **Check for Updates:** Choose File⇨Help⇨Check for Updates to allow Word to use Windows Update on your system (if you're using Windows Vista or Windows 7) to look for updates to Office. If you're using Windows XP, this command points you to a Web page that helps you locate and install Word updates.
- ◆ **Get Training:** Choose File⇨Help⇨Getting Started to open a Web page containing basic information about Word. From there, click the Microsoft Office Training link to access training videos and courses online.
- ◆ **Contact Microsoft.** Choose File⇨Help⇨Contact Us to open a Web page listing ways to contact Microsoft for product support.

# Book II

## All about Editing



## *Contents at a Glance*

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# Chapter 1: Getting Around in Your Documents

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## *In This Chapter*

- ✓ Moving the insertion point
- ✓ Navigating a document
- ✓ Returning to your last edit
- ✓ Browsing with the Navigation pane

**M**aybe you remember the Beach Boys tune “I Get Around.” If you do, it’s probably stuck in your head now that I’ve mentioned it, so you can sing it to yourself as you read this chapter and find out the many ways you can zip from one part of your document to another.

## *The Most Basic Way to Move Around in a Document*

The most basic way to move around a document is to press the arrow keys to move the insertion point one character at a time. The four arrow keys move the insertion point as listed here:

<b><i>Keystroke</i></b>	<b><i>Where the Insertion Point Moves</i></b>
←	Back one character
→	Forward one character
↑	Up one line
↓	Down one line

Admittedly, one character at a time can be a tedious mode of transportation when dealing with a content-heavy document. To speed things up, hold down the Ctrl key while pressing an arrow key, which moves the insertion point as described here:

<b><i>Key Combo</i></b>	<b><i>Where the Insertion Point Moves</i></b>
Ctrl+←	To the previous word
Ctrl+→	To the next word
Ctrl+↑	To the start of the previous paragraph
Ctrl+↓	To the start of the next paragraph

To take even bigger leaps over the useful information you have entered in your document, use the following additional navigation keys, generally found above the arrow keys on your keyboard:

<b>Key or Key Combination</b>	<b>Where the Insertion Point Moves</b>
PageUp	To the previous screen
PageDown	To the next screen
Home	To the beginning of the current line
End	To the end of the current line
Ctrl+PageUp	To the previous browse object
Ctrl+PageDown	To the next browse object
Ctrl+Home	To the beginning of the document
Ctrl+End	To the end of the document

If you're confused by the Ctrl+PageUp and Ctrl+PageDown shortcuts, join the club. These keys work differently depending on the browse object you've selected for use with Word's Go To feature. For more information, see the section "Just Browsing," later in this chapter, where I help you a bit more with that topic.

## *Using the Scroll Bar*

If you've ever used a Windows program, you're certainly acquainted with the scroll bar. The scroll bar in Word is the same all over again. Here are a few things you can do with the scroll bar:

- ◆ Click the arrow buttons at the top or bottom of the scroll bar to scroll the document up or down. The document continues scrolling as long as you hold down the button.
- ◆ Drag the scroll box (sometimes called the *thumb*) to scroll the document up or down. As you drag the scroll box, a balloon appears, indicating the current page number as well as textual information such as the current heading.
- ◆ Click the scroll bar above or below the scroll box to scroll up or down one screen at a time. Pressing PageUp or PageDown does the same thing.
- ◆ Just below the scroll bar is the *browse control*. This set of three buttons consists of a double arrow pointing up, a button that looks like a marble, and a double arrow pointed down. The browse control isn't part of the scroll bar, but you can use it for navigation. For more information, see the section "Just Browsing," later in this chapter.



- ◆ The horizontal scroll bar appears toward the bottom of the screen when, for whatever reason, the screen can't display the entire width of the document (for example, when the document is at a high zoom level or the Clipboard or Research pane is open). Nonetheless, you won't use the horizontal scroll bar much, except perhaps when you're working with Word's drawing features.

## *Rolling Around with the Mouse Wheel*

Most mice have a cool little wheel between the mouse buttons. You can roll the wheel forward or backward or click it as though it were a third mouse button. Word supports these functions in the mouse wheel control:

- ◆ *Scroll* your document by rolling its wheel, which is equivalent to clicking the up- or down-arrow buttons in the scroll bar.
- ◆ *Pan* the document by pressing and holding the wheel and then dragging the mouse up or down. When you do so, the document scrolls in the direction you slide the mouse. The farther you drag the mouse, the faster the document scrolls.
- ◆ *Autoscroll* the document by clicking the mouse wheel once and then moving the mouse slightly. The document starts to slowly scroll down and continues to scroll down until you click any mouse button (including the wheel) or press any key. (As with panning, you can increase the speed of autoscrolling by dragging the mouse. The farther you drag the mouse, the faster the document scrolls. You can also reverse the autoscroll direction by dragging the mouse up.)
- ◆ You can zoom in or out by holding down the Ctrl key while rotating the mouse wheel. For fun, hold down the Ctrl key and roll the mouse wheel back and forth to watch your document zoom in and out.



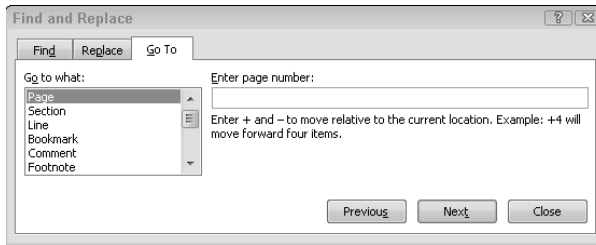
## *Using the Go To Command*

Don't need directions and just want to get there? The Go To command allows you to move where you want when you want. Ironically, you have several ways to find the Go To command:

- ◆ Click the Find button arrow in the Editing group of the Home tab. Then select Go To.
- ◆ Press F5.
- ◆ Press Ctrl+G.

The Find and Replace dialog box (more on this topic in Chapter 4 of this minibook) appears with the Go To tab selected, as shown in Figure 1-1.

**Figure 1-1:**  
The Go To  
tab of the  
Find and  
Replace  
dialog box.



In the Go to What list box, the Page option is automatically selected because it's the most common use of this feature. Simply type the page number in the Enter Page Number text box and click Go To (the Next button changes to a Go To button the moment you type a page number) or press Enter. Click the Close button or press Esc to dismiss the Find and Replace dialog box.



Besides going to a specific page, you can go forward or backward a certain number of pages. To go forward, type a plus sign (+) in the Enter Page Number text box followed by the number of pages you want to skip. For example, to go 3 pages forward, type **+3**. To go backward, type a minus sign (-) rather than a plus sign. For example, type **-20** to go backward 20 pages.

In addition to going to a specific page, the Go To command enables you to go to a particular section or line or any of several types of goodies that might reside in your document, such as bookmarks, annotations, and footnotes. To go to something other than a page, just change the setting in the Go to What list box.

## *Just Browsing*

Just below the vertical scroll bar is a set of three buttons that comprise the *browse control*. Normally, you use the top and bottom double arrows to scroll through your document one page at a time. However, by using the circular Select Browse Object button in the middle, you can train those arrows to do your bidding.













Clicking the Select Browse Object button (or pressing Alt+Ctrl+Home) opens the Browse menu, shown in Figure 1-2.

**Figure 1-2:**  
The Select  
Browse  
Object  
menu.



The first two buttons on the second row of this menu invoke the familiar Go To and Find commands. The ten remaining buttons change the unit by which Word browses the document when you click the double-up or double-down arrow control. Table 1-1 describes the function of each of the 12 buttons on the Browse menu.

**Table 1-1 Options on the Select Browse Object Menu**

<i>Button</i>	<i>What It Does</i>
	Browse by page
	Browse by section
	Browse by comment
	Browse by footnote
	Browse by endnote
	Browse by fields
	Browse by table
	Browse by graphic
	Browse by heading (as indicated by standard heading styles)
	Browse by edits (works in conjunction with revision tracking)
	Find
	Go To

## *Going Back. . . .*

I can't tell you how many times I've pressed Ctrl+Z (Undo) to try to undo the effect of an errant navigation command. For example, I accidentally press Ctrl+End and find myself at the end of the document. Then I press Ctrl+Z, thinking that it takes me back to where I was. Unfortunately, Undo doesn't apply to navigation commands. So what happens instead is that the last editing operation I did gets undone. Sure, you can correct your mistake by pressing Ctrl+Y, the magic Redo command, to reinstate the editing undone by your inadvertent use of Ctrl+Z. But there's a better way.

The Go Back command is a little-known command that isn't accessible from the Ribbon. You can access this command only by using its keyboard shortcut, Shift+F5. Word remembers the last five revisions you made in your document, and each press of Shift+F5 returns the insertion point to one of those previous locations. So if you inadvertently use or misuse one of the navigation commands presented in this chapter and find yourself where you don't want to be, press Shift+F5 to go back to where you were.



When you first open a previously saved document, pressing Shift+F5 takes you to the location you were working on when the document was last closed. *That's* a useful piece of computing!

## *Using Bookmarks*

A *bookmark* identifies a location or a selection of text that you name so that you can call on it as you would your faithful pup.

To create a bookmark, follow these steps:

- 1. Select the text or item to which you want to assign the bookmark.**

You can select a specific point or a selection of text.

- 2. On the Insert tab in the Links group, click the Bookmark button or press Ctrl+Shift+F5.**

This step opens the Bookmark dialog box, shown in Figure 1-3.

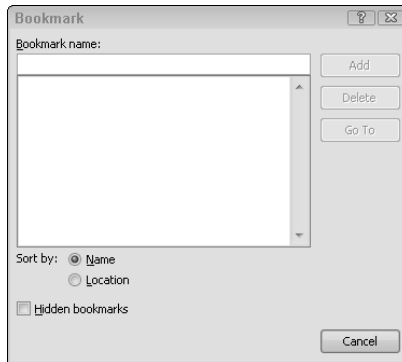
- 3. Enter a name for your selection in the Bookmark Name text box.**

Bookmark names can contain letters and numbers, but they must begin with a letter. No spaces or special characters are allowed. Use an underscore ( `_` ) to separate words in the bookmark name. If you try to use inappropriate characters, Word keeps the Add button grayed out until you change your wayward ways.

- 4. Click Add.**

The Bookmark dialog box closes.

**Figure 1-3:**  
The  
Bookmark  
dialog box.



To return to a place you have bookmarked, simply reopen the Bookmark dialog box by using a method from Step 2, select the location you want to travel to, and press Enter or click the Go To button. Note that you can sort the Bookmark Name list by name or location by using the Sort By radio buttons.



You can also use the Go To dialog box to find a bookmark. Open the dialog box by clicking the Select Browse Object button or by pressing Ctrl+G. In the Enter Page Number text box, type the name of the bookmark. You don't even need to change the Go to What option; Word is smart enough to figure out that you're looking for a bookmark.

Deleting a bookmark is as simple as opening the Bookmark dialog box, selecting the bookmark to be deleted in the Bookmark Name list box, and clicking the Delete button. **Note:** You cannot undo this action.

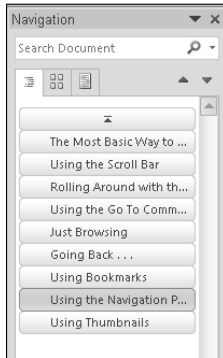
## Using the Navigation Pane

When you're working with a document that has a lot of headings, the Navigation pane is a quick way to navigate. Use this feature to move from heading to heading at a click of the mouse button.

To open the Navigation pane, select the Navigation Pane check box in the Show group on the View tab. As you can see in Figure 1-4, a separate pane opens to the left of the document's text with a list of all the headings. Simply click the heading you want to work with to have your insertion point moved there.

When you're done with the pane, you can close it by clicking the Close box in the upper-right corner of the pane or by deselecting the Navigation Pane check box in the Show group on the View tab.

**Figure 1-4:**  
The  
Navigation  
pane.

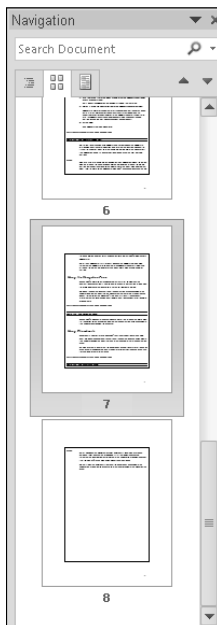


## *Using Thumbnails*

Thumbnails are most useful when you're using graphics to navigate your way. To see the thumbnails, select the Navigation Pane check box in the Show group on the View tab and then click the middle tab in the Navigation pane.

As you can see in Figure 1-5, *thumbnails* are small images of the pages in a document. You can click any thumbnail to open that page. If the document has more than just a few pages, a scroll bar appears in the Navigation pane so that you can scroll through the thumbnails.

**Figure 1-5:**  
Thumbnails.



# Chapter 2: Basic Text Formatting

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## *In This Chapter*

- ✓ Fiddling with fonts
- ✓ Playing with paragraphs
- ✓ Typing with tabs

**W**ord offers an unbelievable number of formatting options and some nifty new features to help your document appear shiny, new, and attractive. When a document looks nice, people are more inclined to assume that the information contained within is accurate and smart. (Unfortunately, sometimes looks can be deceiving.) So, to keep you from presenting a document that looks like your dog ate it, use the formatting techniques and tricks in this chapter.

## *Understanding Formatting*

Digging right in, you can format these three basic elements:

- ◆ **Character:** The smallest element you can format in Word. You can make a character bold, italic, or underlined; change its font size; and more. If you're deranged, you can format every character of your document differently. Doing so gives your documents a ransom note appearance, which is probably something to avoid.
- ◆ **Paragraph:** The next biggest element you can format in Word. You can format each paragraph so that it has its own tab stops, line spacing, extra space before or after the paragraph, indentation, alignment (left, right, centered, or justified), and more. Every paragraph in Word has a paragraph style, which includes some character formatting. So the only time you need to apply a character format is when you want characters to vary from the paragraph's default character format, such as when you italicize or bold a word.
- ◆ **Section:** Word also enables you to control the layout of sections. You can format each page by setting its top, bottom, left, and right margins, specifying the number of columns and their sizes, picking a paper size, controlling the placement of headers and footers, and more. You can format your document so that all pages have the same layout, or you can divide your document into *sections*, each with a different page layout. That's why Word refers to these formats as *section formats*.

## A word about sections

If you use more than one page layout in a document, the document is divided into two or more sections. Each section except the last one ends with a *section break*, displayed as a double line that spans the width of the page. Section breaks work much like paragraph marks: If you delete one, the text before the section break assumes the page layout of the section following the break.

Every document has at least one section, but you see section breaks only if you divide the document into two or more sections. Where's the section break for the last section of a document? The document has none. The formatting information for the last section of a document is stored in the last paragraph mark in the document.



You have not only numerous formatting options to apply but also various ways to apply them. You can use the tools in the Font and Paragraph groups on the Home tab on the Ribbon or on the Mini toolbar or by using keyboard shortcuts. And, if you still can't find what you're looking for, you can open the Font dialog box.

You can apply formatting either before or after you type the text you want to format. To apply formatting before you type the text, follow these steps:





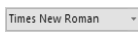
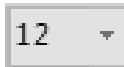



1. **Type text to the point where you want to apply a format.**
2. **Turn on the special character formatting by using one of the keyboard shortcuts or the buttons on the Ribbon listed in Table 2-1.**
3. **Type away.**  
Any text you type now assumes the format you applied in Step 2.
4. **After you type all the text that needs special formatting, use the same Ribbon button or keyboard shortcut you used in Step 2 to turn off the formatting.**

That way, you can continue typing the rest of your document using normal formatting.

**Table 2-1** Character Formatting the Easy Way

<i>Toolbar Button</i>	<i>Keyboard Shortcut</i>	<i>What It Does</i>
	Ctrl+B	Applies bold
	Ctrl+I	Applies italic



<i>Toolbar Button</i>	<i>Keyboard Shortcut</i>	<i>What It Does</i>
	Ctrl+U	Applies underline (continuous)
	Ctrl+Shift+W	Applies Word underline
	Ctrl+Shift+D	Applies double underline
	Ctrl+Shift+A	Changes to all caps
	Ctrl+Shift+K	Changes to small caps
	Shift+F3	Toggles case
	Ctrl+=	Applies subscript
	Ctrl+Shift+=	Applies superscript
	Ctrl+Shift+F	Changes font
	Ctrl+Shift+P	Changes point size
	Ctrl+]	Increases size one point
	Ctrl+[	Decreases size one point
	Ctrl+Shift+>	Increases size to next available size
	Ctrl+Shift+<	Decreases size to previous available size
	Ctrl+Shift+Q	Switches to Symbol font
	Ctrl+Shift+Z or Ctrl+spacebar	Removes character formatting

To apply a character format to text you already typed, follow these steps:

- Highlight the text you want to format.**

To highlight a single word, double-click anywhere in the word. To highlight an entire paragraph, triple-click anywhere in the paragraph. If you want to make a specific selection that doesn't fall into one of those two categories, highlight the text you want to format by clicking and dragging the mouse over it or by using the arrow keys to move the insertion point while holding down the Shift key.



If you enabled Word's Automatic Word Selection option, you don't have to double-click to select a word; Word automatically applies a formatting change to the entire word if the insertion point is anywhere in the word. To activate this option (or to deactivate it if it's already activated),

choose File→Options to open the Word Options dialog box. Select the Advanced tab and then, under Editing Options, select the When Selecting, Automatically Select Entire Word check box. Click OK or press Enter to close the Word Options dialog box.

**2. Apply the format by using one of the keyboard shortcuts or buttons (refer to Table 2-1).**

The effects of your formatting are immediately apparent.

**3. That is all.**

Disperse. There's nothing more to see here. Return to your homes.

Here are some other tidbits on character formatting:

- ◆ You can gang-tackle text with formats, if you want. For example, you can format text as ***bold italic double-underlined*** if you're truly desperate for attention. (Can you hear the applause?)
- ◆ To remove *all* character formatting, highlight the text that you want to restore to normal. Then select the Clear Formatting button in the Font group of the Home tab on the Ribbon or press Ctrl+spacebar.
- ◆ To remove a specific character format, such as bold or italic, but leave other character formats intact, highlight the text and press the keyboard shortcut or click the button on the Ribbon for the format you want to remove.



## Formatting Text

The following sections show you how to apply various formats to characters. The easiest way is to use keyboard shortcuts (if you can remember them) or the various tools in the Font group on the Home tab on the Ribbon. Table 2-1, earlier in this chapter, is an overview of the Font group and those handy keyboard commands.

### Setting the font and size

Okay, so you know you want to see your name in Goudy Stout, 28 point, bold, italicized, double underlined, green font. I want to show you how to do just that, starting by setting that Goudy Stout font and size.

When you create a new document, Word automatically selects the Calibri size 11 font. Here's how to change the font and size:

- 1. Select the text you want to change, or if you just want to format one word, place the insertion somewhere in that word.**

2. In the Font group on the Home tab on the Ribbon, select the Font drop-down list and scroll (or “arrow down” if you have time to burn) to Goudy Stout and click it.

The Font drop-down list now shows Goudy Stout.



Did you notice that when you pointed to different fonts in the Font drop-down list, the selected text in your document temporarily changed to that font? This nifty feature, *Live Preview*, is a fun way to see what your text will look like with different fonts before you apply the font. Go ahead — I *know* you want to play with this feature.

Note that the drop-down list is divided into sections: Theme Fonts, Recently Used Fonts, and All Fonts. If you regularly need to swap between fonts, don't waste time scrolling to search — just check the Recently Used Fonts section.

3. Select the Font Size drop-down list (next to the Font drop-down list) and then select 28, or select the text box and type 28.

Yes, Live Preview is at work again. I'm waiting. Go play.



If you want only to increase the font size, you can click the Grow Font button to the right of the Font Size drop-down list. Use the Shrink Font button next to it to, well, shrink the font.



If you don't particularly care for Calibri 11-point font, go ahead and change the default font for all new documents you create. Click the Font dialog box launcher in the lower-right corner of the Font group on the Home tab. Then, from the Font tab in the dialog box, select the options you want as part of your font and then click the Set As Default button. If you're certain that you want to change your font, click Yes in the window that appears. You're asked whether you want this change to affect all new documents, thereby changing the NORMAL template. Otherwise, click No or Cancel.

## *Applying bold, italics, and other goodies*

In addition to the Font and Size controls, the Font group on the Home tab on the Ribbon also contains buttons you can use to apply special formatting like bold or italics to individual bits of text.

Along with the default options on the Ribbon mentioned previously, the Font dialog box has options to further modify text. Double Strikethrough, Shadow, Outline, Emboss, Engrave, and the mysterious Hidden are the remaining options.






You can open the Font dialog box by clicking the dialog box launcher in the Font group, in its lower-right corner.

## Using text effects



The Text Effects button (shown in the margin) is the key to creating fancy logos, such as text that wraps around circles or text that has a three-dimensional look. When you click this button, a menu with various text formatting options appears. That menu includes a gallery of predefined text effects, as well as the individual formatting options described in Table 2-2.

**Table 2-2**      **Formatting Options on the Text Effects Menu**

<i>Control</i>	<i>Name</i>	<i>What It Does</i>
	Outline	Sets text outline
	Shadow	Adds shadow text
	Reflection	Creates faint reflection on invisible surface beneath text
	Glow	Adds glowing effect to text
	Clear Text Effects	Removes text effects you have applied

## Using the highlighter

Need to make something obvious? Afraid that Goudy Stout in green won't hold the attention of your audience? Highlight the information this way:

1. **Click the Text Highlight Color button in the Font group on the Home tab on the Ribbon.**

You can select the drop-down list and choose from the color palette a color other than the standard yellow.

The cursor becomes an insertion pointer with a marker slanted across it.

2. **Click and drag in the document to select and highlight.**

The mouse continues to act as a highlighter, enabling you to select multiple portions of text until you tell it to go away.

3. **Tell the highlighter to go away by clicking the drop-down list on the Text Highlight Color button and choosing Stop Highlighting.**

To remove highlighting, select the text involved and then select No Color from the Text Highlight Color drop-down list.



To avoid having the highlighter take over your mouse indefinitely, select the text you want highlighted before clicking the Text Highlight Color button.

### *Playing with text colors*

The drop-down list attached to the Font Color button has two color palettes: Theme Colors and Standard Colors. (For a discussion of themes, see Chapter 3 of this minibook.)

If none of those colors is quite what you're looking for, select More Colors at the bottom to open the Colors dialog box. You then choose from two tabs: Standard and Custom. Simply select a color block somewhere in either of the color palettes and click OK.

### *Using the Font dialog box*

The character formatting options you're likely to use most often — bold, italics, underlining, font, and point size — are all readily accessible in the Font group on the Home tab on the Ribbon or by using keyboard shortcuts. Microsoft has now added some of the less often used options to the Ribbon, such as Strikethrough and Change Case. Follow the steps in this section if for some reason you need to apply another formatting option, such as one of these:

- ◆ Character spacing
- ◆ Double strikethrough
- ◆ Emboss
- ◆ Engrave
- ◆ Hidden
- ◆ Outline
- ◆ Shadow

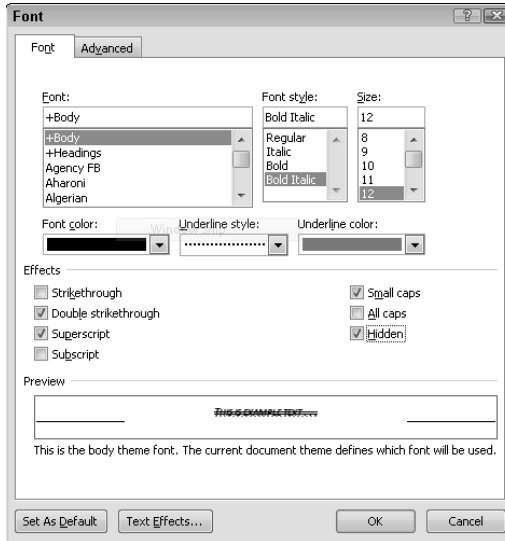
To apply one of these formatting options, follow these steps:

1. **Highlight the text you want to format (or “to mangle with oddball formatting,” as I like to say).**
2. **Open the Font dialog box by clicking the dialog box launcher in the lower-right corner of the Font group or by pressing Ctrl+D.**
3. **Play with the options shown in Figure 2-1.**

Fiddle with the various controls to set the font, font style (bold or italic, for example), and size. Click the effects you want (strikethrough, superscript). Use the drop-down lists to set the underline and color. (Live Preview can't help you here.)

#### 4. Click OK when you've had enough.

The dialog box vanishes and your text magically transforms with the formats you selected.



**Figure 2-1:**  
The Font  
dialog box.

I have a few more tips for using the Font dialog box:

- ◆ If you haven't yet typed the text you want to mangle, use the Font dialog box, select the formats you want, click OK, and then start typing. When you're done, press Ctrl+spacebar to resume normal typing.
- ◆ Do you see the Advanced tab at the top of the Font dialog box? If you click the Advanced tab, you see options to control the spacing between characters, raise or lower characters from the baseline, and apply the spiffy desktop publishing feature named *kerning*. These options are in the realm of desktop publishing, so you can safely ignore them unless you're self-publishing a Pulitzer Prize-winning novel.
- ◆ If you find that you frequently use a formatting option that doesn't have a place on the Ribbon or a keyboard shortcut, you can create your own keyboard shortcut or add the icon to the Ribbon, which I describe in Book VIII, Chapter 1.



To get rid of all formatting and return your content to its default settings, click the Clear Formatting button in the Font group on the Ribbon. The button looks like a piece of paper above a white eraser.

# Formatting Paragraphs

The Paragraph group on the Home tab on the Ribbon is shown in Figure 2-2 and is your first ally in formatting paragraphs.

**Figure 2-2:**  
Paragraph  
group.



To format a paragraph, first click anywhere in the paragraph you want to format. (Where you click in the paragraph doesn't matter.) Then use one of the keyboard shortcuts or buttons on the Ribbon that I describe in the following sections. The effect of your formatting is immediately obvious.

To remove all paragraph formatting, press Ctrl+Q.

## Justification

You can set the paragraph alignment to Align Left, Align Right, Center, or Justify by using the first four buttons at the bottom of the Paragraph group on the Home tab on the Ribbon. Table 2-3 shows the different ways you can align text using the Ribbon.

Table 2-3 Alignment Commands on the Ribbon		
Toolbar Button	Keyboard Shortcut	Alignment
	Ctrl+L	Left
	Ctrl+E	Center
	Ctrl+R	Right
	Ctrl+J	Justify

## Line spacing



In the Paragraph group on the Home tab on the Ribbon, you find the Line and Paragraph Spacing button, which you use to add space between the lines of text in a paragraph. By default, lines are single spaces, with slightly more than that amount below a paragraph. In the Line and Paragraph Spacing drop-down list (in the Paragraph group on the Home tab), you can select several options for the paragraph's line spacing. The ones you use most are 1.0, 1.5, and 2.0. Click the dialog box launcher to open the Paragraph dialog box, where you can select one of these options from the Line Spacing drop-down list:

- ◆ **At Least:** Specify a minimum measurement for the line spacing, such as At Least 14 Points.
- ◆ **Exactly:** Set an exact measurement.
- ◆ **Multiple:** Set other amounts of line spacing, such as 3 Lines.

The following keyboard shortcuts can help you quickly format paragraph spacing:

<i><b>Keyboard Shortcut</b></i>	<i><b>Effect on Paragraph</b></i>
Ctrl+1	Single-space
Ctrl+2	Double-space
Ctrl+5	1.5 line spacing



A paragraph format is stored in the paragraph mark at the end of the paragraph. Don't make the mistake of spending hours polishing a paragraph's appearance and then deleting the paragraph mark to merge the text into the following paragraph. If you do, you lose all the formatting you so carefully applied. (If that happens, quickly press Ctrl+Z to undo the deletion.)

## Simple bullet and number lists

If you're a lover of lists, I have good news and bad news. The good news is that I cover how to create bullet lists and number lists in this book! The bad news is that I don't cover that topic in this chapter. Instead, make your way to Book III, Chapter 3. Then cross that task off your to-do list.

## Indenting

Some publications require that you indent the first line of every paragraph. Others require that you indent all lines by moving them to the right — useful for *nested* paragraphs (a paragraph within a paragraph) or *block quote* (a quote that's set off from the margins to give it more space on the sides). As with most formatting, your first line of defense is the Ribbon.





Place the insertion point somewhere in the paragraph you want nested and click the Increase Indent button in the Paragraph group on the Home tab. This button isn't a toggle, so if you continue to click it, you increase the indent.



Gone too far? To unindent an indented paragraph, use the Decrease Indent button.

To indent both sides of a paragraph, summon the Paragraph dialog box (by clicking the dialog box launcher in the lower-left corner of the Paragraph Group) and set the left and right indents to the same value.

You can have Word automatically indent the first line of every paragraph you type, rather than try to press the spacebar exactly eight times every time. Here's how:

1. **Open the Paragraph dialog box by using the dialog box launcher in the Paragraph group on the Home tab on the Ribbon.**
2. **In the Indentation area, select the First Line option from the Special drop-down list.**
3. **(Optional) If you want, change the amount in the By box.**

The box automatically says 0.5" and can be changed by typing over the figure or using the spinner buttons to the right of the text.

4. **Click OK.**

To indent everything except the first line of a paragraph, select Hanging Indent from the drop-down list in Step 2.

## Sorting

You know how it is: You're quickly dumping a list of information (which has turned into a 32-item list) when you realize how much easier it would be to work from if it were in alphabetical order. Fortunately, you can do that to a one-level bulleted or numbered list. Follow these steps:

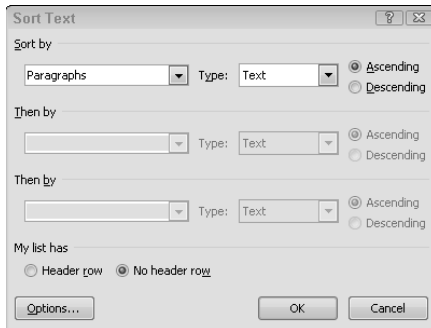


1. **Place the insertion point somewhere in the list and click the Sort button in the Paragraph group on the Home tab on the Ribbon.**

This step opens the Sort Text dialog box, shown in Figure 2-3. When the dialog box opens, the first drop-down list under Sort By has Paragraphs selected and the Type drop-down list is set to Text — exactly what you're trying to do.

2. **Select either the Ascending or Descending option.**
3. **Click OK.**

**Figure 2-3:**  
The Sort  
Text dialog  
box.



You can also use the Sort Text dialog box to sort tables, which I discuss in Book IV, Chapter 4.

## *Paragraph marks*

Paragraph formatting is contained with the paragraph mark at the end of the paragraph. The mark looks like a backward letter P. If you want to permanently see the paragraph marks on your screen, follow these steps:

- 1. Choose File⇨Options to open the Word Options dialog box.**
- 2. Click the Display tab.**
- 3. Select the Paragraph Marks check box under the heading Always Show These Formatting Marks on the Screen.**
- 4. Click OK.**

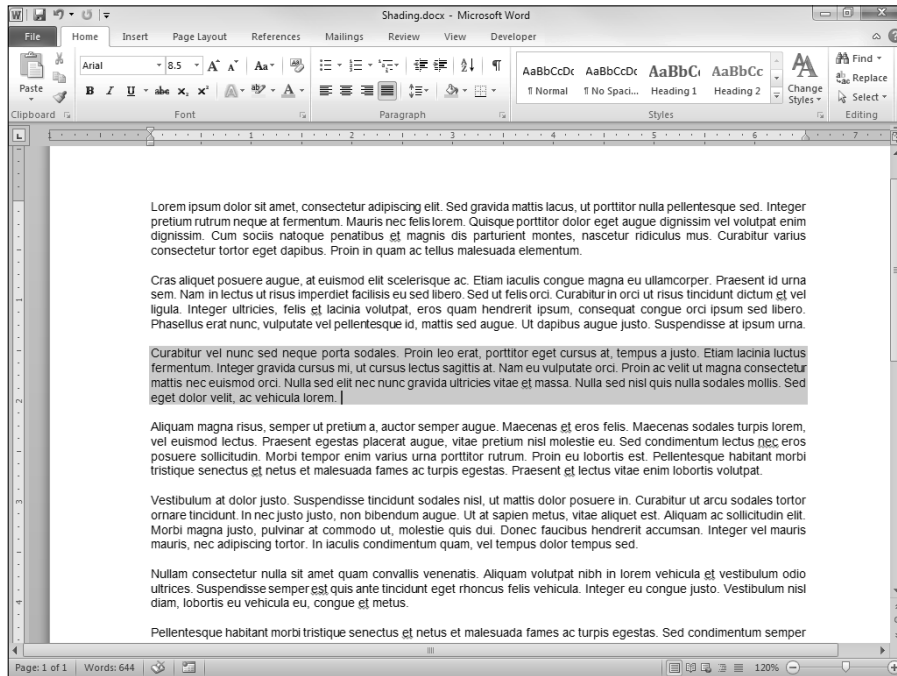
If you decide that you don't want to see the paragraph marks, simply go back through the steps and deselect the check box.



To see paragraph marks and all other hidden formatting symbols, use the Show/Hide button in the Paragraph group on the Home tab on the Ribbon. This button acts as a toggle switch, allowing you to display the symbols or not.

## *Background colors*

The Shading tab in the Borders and Shading dialog box lets you apply shading to a paragraph or a selection of text. Shading is a useful way to draw attention to key parts of your document. For example, Figure 2-4 shows a document with a block of shaded text.



**Figure 2-4:**  
A shaded paragraph.

To apply shading to your text, follow these steps:

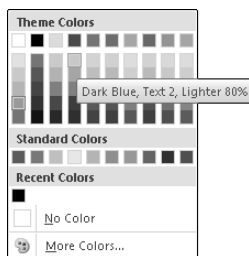
## 1. Select the text you want to shade.

You can select individual characters, a single word or group of words, or a single paragraph or even a group of paragraphs.



## 2. Click the drop-down list on the Shading button in the Paragraph group on the Home tab on the Ribbon.

The color palette appears, as shown in Figure 2-5.



**Figure 2-5:**  
The Shading color palette.

### 3. Select the color you want to use to shade the text.

Your text now has a box of that color behind it.

If you're picky and don't find the color you like, you can click the More Colors option to open a dialog box that lists even more colors.

Notice that the first three columns of the Theme Colors palette list various shades of gray. The remaining columns list other theme colors. Standard colors are at the bottom.

Here are a few points to keep in mind when shading your text:

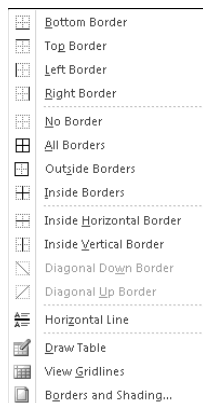
- ◆ Make sure that you can still read the shaded text. For darker shades, you might need to change the font color to keep the text readable. You can use the Font Color button in the Font section of the Home tab to do that.
- ◆ A common text effect creates white text on a black background. To do that, first use the Shading drop-down list in the Paragraph Group on the Home tab to set the background to black. Then use the Font Color button in the Font group on the Home tab to set the font color to white.
- ◆ You must have a color printer to print colors other than black or gray.

## ***Borders***



The Paragraph group on the Home tab on the Ribbon has a handy Border button you can use to apply basic borders. You can click the button to apply the current border type to whatever text you select or click the arrow next to the button to reveal a palette of border types, as shown in Figure 2-6.

**Figure 2-6:**  
Palette  
of border  
types.



To draw a simple box around some text and choose a border, follow these simple steps:

**1. Select the text you want to draw a border around.**

You can select individual characters, a single word, a group of words, a single paragraph, or even a group of paragraphs.

If you don't select any text, Word draws a border around the entire paragraph that the insertion point happens to be sitting in. As a result, if you want to draw a box around an entire paragraph, just click anywhere in the paragraph and proceed to the next step.

**2. Click the down arrow on the Borders button in the Paragraph group in the Home tab on the Ribbon and select the Outside Borders option.**

The list disappears and your text is bordered.

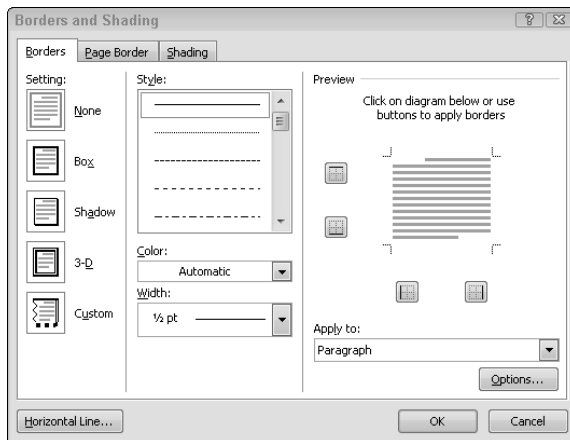
**3. (Optional) To change the border's style, color, or width, select the Borders and Shading option at the bottom of the Border buttons drop-down list. Otherwise, skip to Step 5.**

This step opens the Borders and Shading dialog box.

**4. Make your selections in the Borders and Shading dialog box.**

- In addition to the Box border style, the Borders and Shading dialog box, shown in Figure 2-7, offers two other preset border styles: Shadow and 3-D. You can experiment with these settings to see the effects they have.

**Figure 2-7:**  
The Borders  
and Shading  
dialog box.



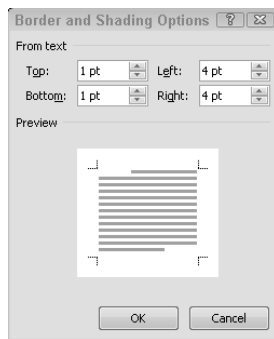
- You can build a custom border one line at a time by clicking the buttons around the various edges of the paragraphs represented in the Preview area to indicate where you want a border to appear. These buttons control whether a border appears above or below or to the left or right of the selection. If you select more than one paragraph, you also see a button that lets you add or remove lines between the paragraphs.

- The Style list lets you choose a fancy style for every line of the border. Various styles, such as double lines and dashed lines, are available. Note that you can change line styles as you apply individual borders so that a paragraph can have a thin border at the top and a thick border at the bottom.
- The Color drop-down list lets you specify the color for your border. You can select a standard or theme color that appears in the palette or click More Colors at the bottom of the palette to open a dialog box that lets you select any color you want.
- The Width drop-down list lets you select a width for each segment of the border.

## 5. Click OK.

By default, the borders are placed one point from the top and bottom and four points from the left and right of the text they surround. If that placement is too tight for you, you can adjust it by clicking the Options button in the Borders and Shading dialog box. The Borders and Shading Options dialog box opens, as shown in Figure 2-8.

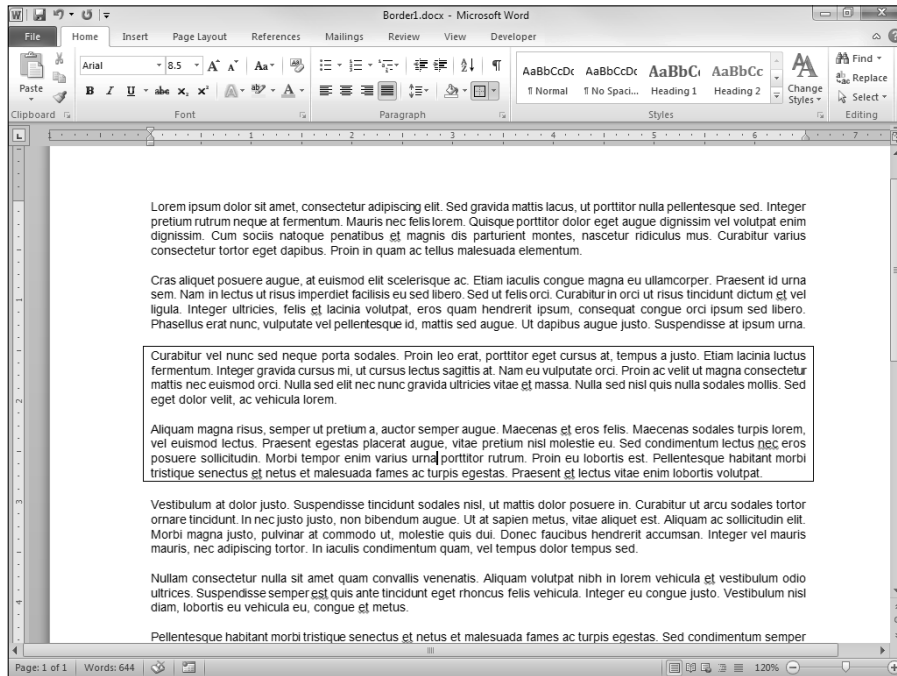
**Figure 2-8:**  
The Borders and Shading Options dialog box.



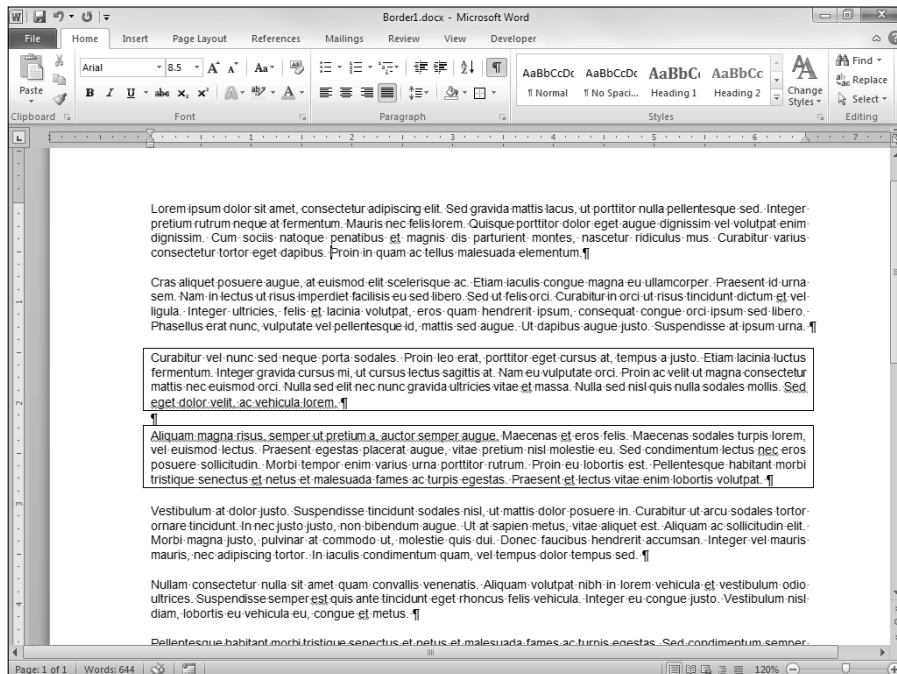
If you select more than one adjacent paragraph of text and format them by using one of the preset border styles, all the paragraphs are contained within a single box, as shown in Figure 2-9.

To box each paragraph separately, place an unboxed paragraph mark between each boxed paragraph by simply pressing Enter to add a blank line, as shown in Figure 2-10. These spacer paragraphs need not contain any text, and you might want to vary their Before or After spacing so that the boxed paragraphs are spaced the way you want.

**Figure 2-9:**  
Paragraph  
borders.



**Figure 2-10:**  
Adjacent  
paragraphs  
showing the  
unboxed  
paragraph  
marker.



Keep these points in mind when playing around with borders:

- ◆ The Borders button applies borders to one or more edges of the selected text or paragraph. The Borders and Shading dialog box controls the style, color, and width of those borders. You have to summon the Borders and Shading dialog box by using the Borders and Shading option on the Borders drop-down list if you want to change those settings.
- ◆ Click the Borders button once to apply a border. To remove a border, click the Borders button again.

## *The Format Paragraph dialog box*

If you find yourself in the unenviable pickle of needing to use a formatting option that isn't on the Home tab and you can't remember its keyboard shortcut, you can always conjure up the Paragraph dialog box and pick and choose your paragraph formats from a palette of delightful formatting treasures.

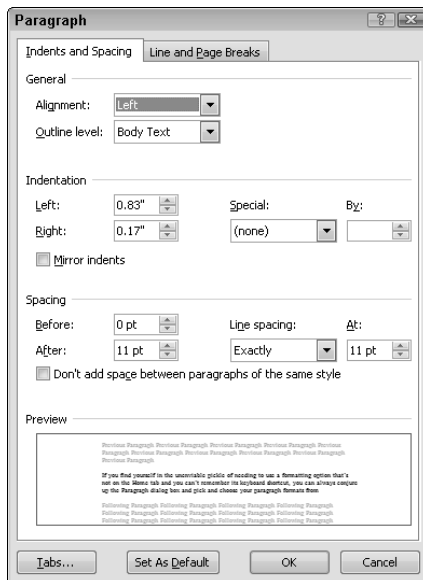
Here's the procedure for using the Paragraph dialog box:

### **1. Click anywhere in the paragraph you want to format.**

Where you click in the paragraph doesn't matter as long as the insertion point is somewhere in the paragraph.

### **2. Click the dialog box launcher on the Paragraph tab on the Ribbon.**

The Paragraph dialog box appears, as shown in Figure 2-11.



**Figure 2-11:**  
The  
Paragraph  
dialog box.



### 3. Play with the controls.

You can set the paragraph alignment (Left, Right, Centered, or Justified) from the Alignment drop-down list. You can increase the Left or Right Indentation or choose a First Line or Hanging indent style from the Special drop-down list. You can also increase or decrease the amount of spacing before and after the paragraph and set the line spacing.

As you play with the controls, keep an eye on the Preview box to see the effect of your changes.

### 4. Click OK when you're done.

Prest-o change-o! You're done.



You can set left and right indentation as well as first-line and hanging indents by playing with the ruler. See the section “Setting tabs by using the ruler,” later in this chapter, for details.

## The Format Painter

You can use the Format Painter to quickly copy character and paragraph formatting from one bit of text to another. The Format Painter works only if you already have some text formatted the way you like. Follow these steps to use the Format Painter:

1. **Highlight the text that has the format you want to copy.**
2. **Click the Format Painter button in the Clipboard group on the Home tab on the Ribbon.**

The button looks like a paintbrush.

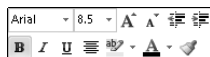
3. **Click and drag the cursor over the text you want to copy the format to.**

Word formats the new text to look just like the already formatted text.

If you want to use the Format Painter to format two or more sections of text, highlight the text you want to use as your template and then double-click the Format Painter button. The Format Painter then continuously formats the text you highlight until you press the Escape key or click the Format Painter button again.

## Using the secret formatting toolbar

One of the more obscure formatting features in Word is the (my term) floating format toolbar, which appears when you select text and hover the mouse over the selection for a moment. The floating format toolbar looks like this:



As you can see, the Mini toolbar lets you quickly access many of the font and paragraph formatting commands discussed in this chapter: Font, Font Size, Bold, Italics, and many more.

Note that the floating format toolbar initially appears in semitransparent form when you hover the mouse over selected text, kind of like a ghostly specter that might make you think you're being haunted by the spirits of departed formatting options. When the specter appears, move the mouse toward it to solidify the toolbar.

## All about Tabs

In Word, you can create seven types of tab stops: left, center, right, decimal, bar, first line indent, and hanging indent. You can set tab stops in one of two ways: by dropping them directly on the ruler or by ditzing around with the Tabs dialog box. Dropping tabs directly on the ruler is far and away the easier method of the two. Get involved with the Tabs dialog box only when you want to use *leaders*, the little rows of dots that run across the page.

### *Setting tabs by using the ruler*

The easiest way to set tabs is to use the ruler. Here's the procedure for setting tabs with the ruler:

- 1. If the ruler isn't visible, click the View Ruler button at the top of the vertical scroll bar.**

- 2. Type some text that you want to line up with tab stops.**

Type several paragraphs, if you want. Press the Tab key only once between each column of information you want to line up. Don't worry if everything doesn't line up at first. You can fix it later.

- 3. Select the paragraph or paragraphs whose tabs you want to set.**

If you're setting tabs for just one paragraph, click anywhere in the paragraph. If you're setting tabs for more than one paragraph, click and drag to select at least some text in each paragraph.

- 4. Click the ruler at every spot where you want to insert a new tab stop.**







Watch as the text you selected in Step 2 lines up under the tabs you create. Add one tab stop to the ruler for each column of information you want to align.

- 5. Adjust.**

Nothing works quite right the first time. If you dropped a tab at 1½ inches and want to move it to 1¾ inches, just click and drag the tab marker and slide it to the new location. When you release the mouse button, text in the selected paragraphs adjusts in the new tab position.

Here's more fascinating information about tabs:

- ◆ Default tab stops are placed every half-inch. However, every time you create a new tab stop, any default tab stops to the left of the new tab stops are deleted. In other words, default tab stops exist only to the right of tab stops you create.
- ◆ To change the type of tab that's created when you click the ruler, click the Tab Alignment button at the far left edge of the ruler. Every time you click the button, its picture changes to indicate the tab type, as shown in Table 2-4.

<b>Table 2-4                      Tab Types</b>		
<i>Tab Alignment Button</i>	<i>Tab Type</i>	<i>What It Does</i>
	Left	Left-aligns text at tab stop (and is default tab style)
	Center	Centers text over tab stop
	Right	Right-aligns text at tab stop
	Decimal	Aligns numbers at decimal point over tab stop
	First Line Indent	Sets indentation for first line of paragraph
	Hanging Indent	Creates hanging indent

## *Using the Tabs dialog box*

If you have an unexplainable aversion to the Word ruler, you can set tab stops by using the Tabs dialog box instead. Just follow these steps:

- 1. Click the dialog box launcher in the Paragraph group of the Home tab on the Ribbon.**

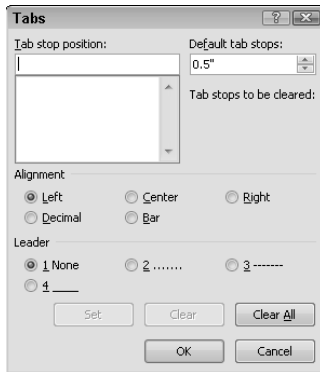
The Paragraph dialog box appears (refer to Figure 2-11).

- 2. Click the Tabs button in the lower-left corner.**

The Tabs dialog box opens, as shown in Figure 2-12.

3. In the **Tab Stop Position** field, type the position where you want the new tab stop to appear.
4. Select the **Alignment** option you want for the new tab stop (**Left**, **Center**, **Right**, **Decimal**, or **Bar**).

For more information about bar tabs, see the later section “Running a bar tab.”



**Figure 2-12:**  
The Tabs  
dialog box.

5. Select the **tab leader** type for the tab stop. If you don’t want leaders, select **1 None**.

I explain leaders later, in the section “Using tab leaders.”

6. Click **Set**.
7. Repeat Steps 3 through 6 for any other tab stops you want to create.
8. Click **OK** to dismiss the Tabs dialog box.



You can quickly summon the Tabs dialog box by double-clicking the lower half of the ruler.

## *Removing all tabs*

To remove a single tab stop by using the ruler, click the tab stop you want to remove and drag it straight down, off the ruler. When you release the mouse button, the tab stop is deleted.

To remove all tab stops, highlight the paragraphs you want to remove the tab stops from. Then complete one of these two actions:

- ◆ Use the dialog box launcher in the Paragraph group on the Home tab on the Ribbon to open the Paragraph dialog box. Then click the Tabs button to open the Tabs dialog box.

- ◆ Double-click the bottom half of the ruler to summon the Tabs dialog box.

Click the Clear All button to remove the tabs and click OK to return to the document.

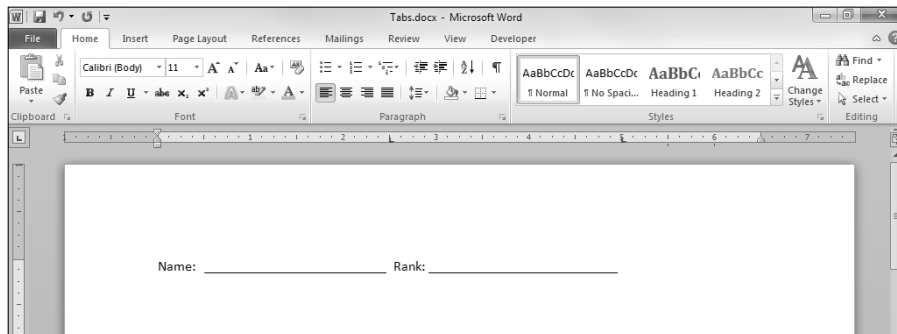
## Using tab leaders

A *tab leader* is a row of dots or dashes or a solid line that precedes the tab, similar to the one you often find on a restaurant menu. Dots and dashes are the leader type you use for lists; solid lines are typical for forms. Just look at the table of contents in the front of this book to see an excellent example of this type of tab leader.

The easiest way to create a tab leader is to first create the tab stop by dropping it on the ruler. Then double-click the bottom of the ruler to open the Tabs dialog box, choose the tab stop you want to add the leader to, and select a leader type (dots, dashes, or solid line). Then click OK and check the results.

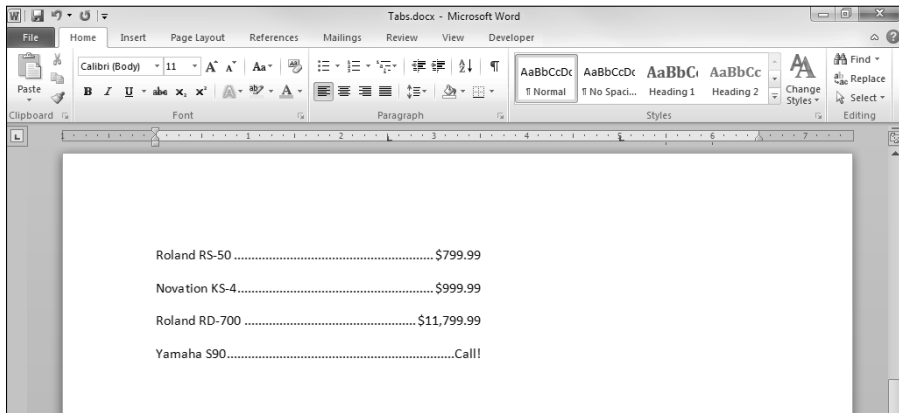
If you want the tab leader to end at a certain location, create a left-aligned tab at that location by using the leader type of your choice. This technique is commonly used to create fill-in-the-blank forms. For example, Figure 2-13 shows two left-aligned tab stops with solid-line leaders, one at 2½ inches and the other at 5 inches.

**Figure 2-13:**  
Solid-line  
leaders.



If you're going to use dot or dash leaders to connect items in a list, you usually use right- or decimal-aligned tabs. For example, I formatted the document in Figure 2-14 with a single, right-aligned, dot-leader tab stop at 4.5 inches.

**Figure 2-14:**  
Dot leaders.



## *Running a bar tab*

You must be 21 to use this feature in most states.

One of the more unusual things you can do with tabs is create vertical bars between columns of information, like the ones shown here:

Hawkeye	James T. Kirk	Gilligan
B.J.	Mr. Spock	The Skipper
Charles	Dr. McCoy	The Professor
Hot Lips	Mr. Chekov	Mary Ann
Radar	Mr. Sulu	Ginger
Col. Potter	Lt. Uhura	Mr. Howell
Father Mulcahy	Nurse Chapel	Mrs. Howell

In this table, the vertical bars between columns are special deviant versions of tab stops. Bar tabs aren't like regular tab stops in that the Tab key doesn't stop at them. As a result, you use only one tab character between each column. To set bar tabs, first create a left tab for each column. Then click the tab type button to the left of the ruler until the Bar Tab button appears. Then add a bar tab a little to the left of each left tab you created.



Bar tabs are a crude way of making tables. A far better way to create tables with ruled lines is to use Word's Table feature, which I cover in Book IV, Chapter 4.

## ***The Ten Commandments of Formatting***

When Bill Gates came down from the mountain, he originally had 15 formatting commandments. But he dropped one of the three tablets, shattering it to pieces, so now we have only ten.

### ***I. Thou shalt learn thy way around the Ribbon while continuing to use keyboard shortcuts***

The Ribbon displays many more handy tools than ever in an easily accessible manner. However, keyboard shortcuts are rarely inadvisable. Don't bother memorizing the keyboard shortcuts for formats you rarely or never use. But be sure to memorize the shortcuts for the formats you use frequently. Pressing Ctrl+B for bold is much faster than clicking the mouse button or contending with the Ribbon and dialog boxes. Make a short list of the shortcuts you want to memorize and tape it to your computer or somewhere within eyesight.

### ***II. Thou shalt not press Enter at the end of every line***

You defeat the whole purpose of word processing if you press Enter at the end of every line you type. Let Word figure out where to break each line. Use Enter to end paragraphs.

### ***III. Thou shalt not create empty paragraphs***

Don't press Enter twice to leave extra space between paragraphs. Instead, format the paragraph with 1½ or 2 blank lines in front of the first line.

### ***IV. Thou shalt not use extraneous spaces***

On a typewriter, you're supposed to press the spacebar twice between sentences. With proportional fonts, use only one space following the period at the end of a sentence. Also, don't use spaces to align text in columns. Use tabs instead.

### ***V. Thou shalt not use extraneous tabs***

Don't press Tab two or three times to move text across the page. Instead, press Tab once and then set a tab stop where you want to align the text.

### ***VI. Thou shalt not underline when italicizing will do***

Underlining is for typewriters. Italics is for computers. You paid lots of hard-earned money for your computer, so you might as well get your money's worth.

***VII. Thou shalt use no more than three fonts on a page***

Avoid the ransom note look at all costs. Use one font for your text, a second font for headings, and maybe a third font for emphasis. But no more than three fonts altogether, please.

***VIII. Thou shalt not use exact line spacing***

The Exact Line Spacing option (find it by clicking the dialog box launcher on the Paragraph group on the Home tab) is a source of much trouble. Use Single, 1.5 lines, or Double instead.

***IX. Thou shalt use the AutoCorrect feature***

The AutoCorrect feature can correct typos on the fly as well as help with simple formatting chores, such as ensuring that sentences start with capital letters and using “curly quotes” properly.

To further define this feature, choose File⇨Options to open the Word Options dialog box. Then click the Proofing tab and click the AutoCorrect Options button at the top of the dialog box. When the AutoCorrect dialog box appears, select the things you want Word to automatically correct; then click OK twice to close the two dialog boxes.

***X. Thou shalt use styles***

The best way to deal with all this formatting nonsense is to put all the formatting you ever need into styles. Then you don’t have to worry about line spacing, hanging indents, fonts and font sizes, or anything else. Just apply the correct style and everything is taken care of. (I discuss styles in detail in Chapter 3 of this minibook. Aren’t you lucky?)



# *Chapter 3: Working with Styles*

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## *In This Chapter*

- ✓ Understanding why styles are important
- ✓ Formatting with styles by using the Styles gallery
- ✓ Changing the document look with style sets and themes
- ✓ Setting the look of new documents you create
- ✓ Exploring other ways of applying styles
- ✓ Finding and clearing the layers of formatting
- ✓ Setting advanced style features

**S**tyles are what Tiggers like best. Using styles is the secret to freeing yourself from the tyranny of using a sequence of formatting commands. With styles, you toil at formatting text until you get the look just right; then you provide a name by which Word remembers all the formatting you applied. From then on, you can apply the same formatting to other text by simply using the style — no more hunting and pecking your way through the various formatting commands, trying to recall how you made the paragraph look so good.

If you aren't yet using styles, I suggest that you find out how to use them right away. Although the concept of styles might be confusing at first, they aren't hard to figure out. An hour or so invested in becoming familiar with how styles work pays off in many saved hours of unnecessary formatting time later.

## *Understanding Styles*

The basic idea behind styles is to store all formatting information for a paragraph under a single name. That way, you can quickly apply saved formats to other paragraphs by simply referring to the style's name. Suppose that you want to format headings in 16-point Arial Bold, with 18 points of space above the heading and 6 points below, and with a line drawn beneath the paragraph. You have to bounce the mouse all over the place to format this heading manually. But if you store the formats in a style, you can apply all formats with a single click or a keyboard shortcut.

Styles can contain any type, or all these types, of formatting:

- ◆ **Paragraph:** Includes left and right indentation, first line indentation and hanging indents, line spacing, before and after spacing, and text flow (widow/orphan control or keep with next, for example).
- ◆ **Tabs:** Includes tab stop positions, tab types, leader tabs, and bar tabs.
- ◆ **Bullets or Numbering:** Enables you to set up numbered or bulleted lists. (See Book III, Chapter 3 for more information about bullets and numbers.)
- ◆ **Borders and Shading:** Includes borders and line styles as well as fill shades.
- ◆ **Font:** Includes the font name, style (regular, bold, italic, or bold italic), and special character attributes such as small caps or superscripts, the font color, and character spacing (including whether kerning is automatically done for some letter pairs).
- ◆ **Language:** Enables you to use an alternative dictionary for spelling and hyphenation or to tell Word to skip a paragraph specified with this style when the document is spell-checked.

With all these formats stored together under one name, you can imagine how much time styles can save you.

Styles are an integral part of the way Word works. Even if you think you don't use styles, you do: Word documents start off using several predefined styles, including the ubiquitous Normal style. It governs the default appearance of paragraphs in your document.

Here are some other benefits of using styles:

- ◆ **Changing the style definition changes all text using that style.** The real beauty of styles emerges when you decide that the headings in your 200-page report are too small. Without styles, you have to adjust the size of each heading separately. With styles, you simply change the style and — *voilà!* — all paragraphs assigned to that style automatically adjust.
- ◆ **You can update the overall document look by changing the style set.** Styles let you take advantage of style sets that let you store collections of styles that you can swap with a single command. For example, you might have one set that defines all styles for a draft format (for example, double-spaced with the headers boxed with a border to make them stand out), another that's used for reviews (with single-spaced formatting but in a larger font), and, finally, one that formats the document into its final form. Word comes with a collection of style sets that let you change the overall look of your document easily — but only if you're using styles to format your text. For more information about style sets, see the section "Switching style sets and themes," later in this chapter.

- ◆ **Styles are part of the document.** Styles are stored along with your text in the document file. Thus, each document can have its own collection of styles, and styles with the same name can have different formatting characteristics in different documents. For example, a style named Bullet List might have ordinary round bullets in one document but check marks or pointy index fingers in another.
- ◆ **Styles can be defined in a template.** When you create a new document, the new document inherits its styles from the template you base the document on. For more information about templates, turn to Book I, Chapter 3.
- ◆ **Styles can be created by others for your use.** Suppose that you don't know how to drop a line three points beneath the paragraph and you don't want to learn how. No problemo. Just bribe a friendly Word guru into creating the style for you. After the style is created, you don't have to know how to use the formatting instructions contained in the style. All you have to know is how to apply the style, and that's as easy as clicking the mouse button.



- ◆ **Some Word features work better if you use styles.** Another benefit of using styles is that some Word features, most notably Table of Contents and Outline view, work best when you use styles for headings and body text. Don't even attempt to use these features if you don't use styles.

For more information about tables of contents, see Book VI, Chapter 1. To find out more about Outline view, see Book VI, Chapter 6.

The various controls discussed in this chapter contain three types of styles:

- ◆ **Character styles**, such as Emphasis, Strong, and Subtle Reference, which apply to only selected text and can contain only font formatting and language information.
- ◆ **Linked styles**, such as Heading 1 and Title, which can apply to either the entire paragraph or selected text.
- ◆ **Paragraph styles**, such as Quote, which can apply only to paragraphs — even if you select only part of the paragraph, the style is applied to the entire paragraph. Paragraph styles are identified by the special *pilcrow* symbol (¶) in front of the style name in the Styles gallery.



Word has five types of styles, but two are so important that they have their own galleries: table styles and list styles. Table styles are discussed in Book IV, Chapter 4, and list styles (used for numbering) are discussed in Book III, Chapter 3.

## Applying Styles with the Styles Gallery

Sitting in the Styles group on the Home tab on the Ribbon is the Styles gallery. It contains the styles that the template designer has decided are most useful for working with the document. Of course, it's your document, so you can add or remove styles as you like. The Styles gallery, shown in Figure 3-1, is the easiest way to work with styles.

**Figure 3-1:**  
Styles  
gallery.



More button

To apply a style to a paragraph, follow these steps:

- 1. Click anywhere in the paragraph you want to format.**

For all styles except character styles, you don't have to select the entire paragraph; just move the insertion point anywhere in it.

- 2. Choose the style you want from the Styles gallery.**

Click the More button next to the Styles gallery to reveal more styles (refer to Figure 3-1). If the text you're formatting is covered by the gallery, thereby preventing the full benefit of Live Preview, use the arrows to scroll additional styles into view without expanding the gallery. Find the one you want and click it. The formatting contained in the style applies to the paragraph.

If the style you want to use isn't showing in the gallery, you can use the Styles pane to find it (see the section "Using the Styles pane," later in this chapter) or, if you know the name of the style, you can use the Apply Styles dialog box (see the section "Using the Apply Styles dialog box," later in this chapter).

To apply a style to two or more adjacent paragraphs, select a range of text that includes all paragraphs you want formatted. Then choose the style. When you press Enter to create a new paragraph, the new paragraph normally assumes the same style as the preceding paragraph. See the section "Setting the style of the next paragraph," later in this chapter, for an important — and useful — exception.



As you work with your document, you might decide that you want to remove the style from a particular paragraph. The best way to remove the style and any formatting is to use the Clear Formatting button, shown in the margin. Even though it's often used when working with styles, the Clear Formatting button prefers to hang out with the font formatting commands and can be

found in the Font group rather than in the Styles group. However, the Clear Formatting command on the bottom of the Styles gallery does the same thing (but you have to show the entire Styles gallery to find this command).

The standard Styles gallery includes several character styles that are intended to be used to format text within your paragraphs. This includes three Emphasis styles, two Reference styles (for indicating text that refers to an element such as a book title), and a style named Strong, used to provide strong emphasis. (The name Strong comes from HTML, where it usually means bold text and Emphasis usually means italic text.) The advantage to using the character styles becomes most obvious when you change themes or style sets and the character styles update so that your document keeps a consistent look.



A paragraph always has a style associated with it (even if it's just the Normal style that Word applies automatically). You can layer a character style on top of the paragraph style, if you want. For example, you can highlight text within a paragraph and assign it the Emphasis style to make it stand out from the rest of the text.

To apply a style to just a portion of text rather than to entire paragraphs, follow these steps:

### 1. Select the text you want to format.

When applying a character style, you can select text in more than one paragraph. When applying a linked style to selected text, all the selected text must be in the same paragraph. You cannot apply a paragraph style to selected text.

### 2. Select the style you want from the Styles gallery.

When you apply a character style, it sticks to the text you've selected. If you move that text to a new paragraph, the character style remains on that text. To remove the character style, use the Clear Formatting button.



Here are some helpful hints to using styles effectively:

- ◆ The name of each style in the Styles gallery is formatted according to the style. This name gives you a hint of how your text will look before you apply the style. What's more, Live Preview shows you exactly what you will see.
- ◆ To quickly return a paragraph to Normal style, press Ctrl+Shift+N.
- ◆ To assign the built-in Heading 1, Heading 2, or Heading 3 styles, press Ctrl+Alt+1, Ctrl+Alt+2, or Ctrl+Alt+3, respectively.
- ◆ You can create keyboard shortcuts for any style you create. See the section "Assigning shortcut keys," later in this chapter.

## Finding Your Own Style

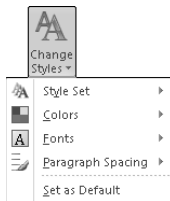
The styles included in the Styles gallery are the ones that Microsoft believes most people need for creating most types of documents. But perhaps you're not like most people and want some different ones. Or, perhaps you don't like the way the standard styles look.

Fear not! You're about to find out how to tailor the styles in the gallery to your needs, rather than have to use the ones Microsoft gave you.

### Switching style sets and themes

Next to the Styles gallery on the Home tab is a button labeled Change Styles that reveals the hundreds of combinations of looks available for the Styles gallery. Clicking the Change Style button reveals controls for changing the main elements that define the look of the Styles gallery. As shown in Figure 3-2, they're Style Set, Colors, Fonts, and Paragraph Spacing.

**Figure 3-2:**  
The Change  
Styles  
control.



If your current document is saved in the Word 2003 format, you can't update the Font and Color aspects for your styles. To gain access to this powerful feature, you need to upgrade your document by selecting the Convert command from the File tab.

The style sets in the Change Styles control update the definitions of the styles used in your document and the Styles gallery. Microsoft ships 11 style sets, but you can also create your own. Figure 3-3 shows the same document with two different style sets applied — the one on the left uses the Word 2010 set, and the one on the right uses the Modern set.

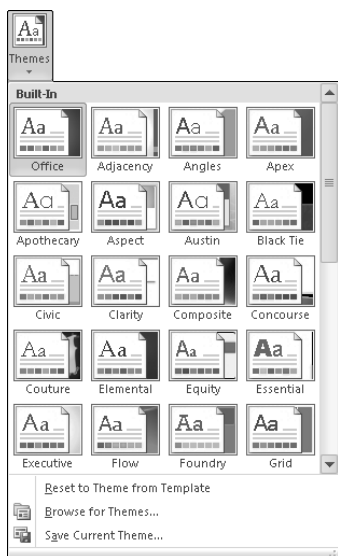
**Figure 3-3:**  
Setting the  
Word 2010  
style set  
(left) and  
Modern  
(right).



The Font and Color controls refine the current theme. A theme provides consistent formatting for not only the text in your document but also objects you might insert, such as tables, charts, and SmartArt diagrams. Each theme has three components: fonts, colors, and effects. Effects are most important when working with charts and diagrams.

You can change the entire theme by using the controls on the Page Layout tab, shown in Figure 3-4. The Font and Color controls are available on the Change Styles control on the Home tab and in the Themes group on the Page Layout tab. PowerPoint and Excel share themes with Word, making it easier to create a collection of documents with quite a similar look.

**Figure 3-4:** Use the Themes control on the Page Layout tab to change all theme settings at one time.



To change the look of the styles in the Styles gallery and in your document, follow these steps:

- 1. Make sure your document includes some text formatted with styles from the Styles gallery.**

Generally, you want to have used Heading 1 and Heading 2 as well as the Normal style and perhaps some character styles. Although you can change the look of the styles in the Styles gallery without having text in your document, styled text makes it much easier to see the various looks.

- 2. Click the Change Styles button on the Home tab, point to the Style Set command, and then select a style set from the list.**

As you move over the various style sets, the text in your document updates to preview the change. However, the styles in the Styles gallery don't change until you commit to your choice.



One major difference among the style sets is the spacing of Normal paragraphs in your document. If you don't like the more open spacing of the Word 2010 default settings, you might prefer the Traditional set. If you want to create a document that's similar to the Word 2003 documents that you have, select the Word 2003 style set.

3. **Click the Themes button on the Page Layout tab and then select a theme from the list.**

When you move your cursor over various themes, the text in your document updates with new fonts and colors. As with style sets, the themes in the Themes gallery update only after you commit to your selection.

4. **To fine-tune the look of the theme used in your document, click the Change Styles button on the Home tab, point to the Fonts command, and then select a font set from the list.**



If you want a document that looks like your old Word 2003 documents, select the Word 2003 style set and the Office Classic font set.

When you find a combination of style set and theme that you want to use for all your documents, you can tell Word to use it for all new documents, as described in the section "Storing the look of your styles," later in this chapter.

## *Changing a style*

You might or might not be able to teach an old dog a new trick, but you can teach Word to use your definitions for any style in the Styles gallery. To do so, follow these steps:

1. **Apply the style you want to update to a paragraph in your document.**

You can just type a temporary paragraph, use it as a sample for the style, and then delete the paragraph. After the style is updated, the paragraph is no longer necessary for Word to remember the style definition.

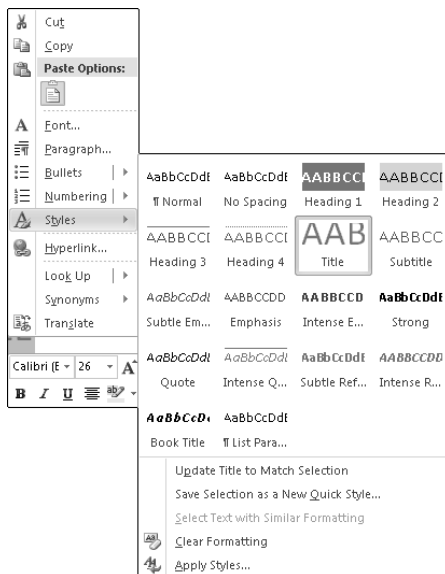
2. **Make whatever formatting changes you want to the formatting of the paragraph.**

If the style you're updating is a character style, Word ignores the paragraph formatting you apply.

3. **Right-click the paragraph and select the Styles submenu, as shown in Figure 3-5.**

If the menu that appears doesn't have the Styles submenu, try right-clicking somewhere else in the paragraph. For example, if you right-click over an unrecognized word, you see the Spelling menu, which doesn't allow you to update the style definition.





**Figure 3-5:**  
The Styles  
submenu.

#### 4. Select Update <style> to Match Selection.

Well, it doesn't say <style> in the command. Instead, the name of the style you applied in Step 1 shows up here. Ensure that you're updating the right style — if the text that your cursor was over when you right-clicked in Step 3 has a character style applied, that character style is updated rather than the paragraph style.

You can also right-click the style in either the Styles gallery or the Styles pane to make the command update it to match the selection. Using those methods, you can be certain that you're updating the style you want to change.



When Word updates the style, it uses the formatting from the start of the paragraph to update the character information stored in the style. So be sure that that part of the paragraph looks the way you want the style to look.



Because the Normal style is so important, Word offers another way to update Normal. One reason that the Normal style is so important is that Word uses it for most paragraphs in your document. Another is that many other styles in your document use its settings as a base. The best method for updating the Normal style is to use the Set As Default buttons found in the Font and Paragraph dialog boxes. For more information about working with these dialog boxes, see Chapter 2 in this minibook.

## Creating your own style

You might find that the styles available in the Styles gallery aren't enough for you. And by golly, you want to add your own style! To do so, follow these steps:

### 1. Format a paragraph with the look you want to store in a style.

You might want to look back at the list at the beginning of this chapter (in the "Understanding Styles" section) to remind yourself of all the things you can store in a style. The most important ones are the character formatting and paragraph indents and whether the paragraph has a number or bullet.

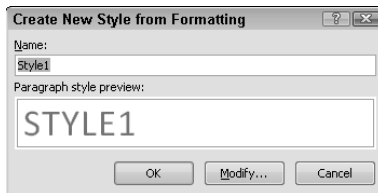


In general, you want to make sure that the paragraph has the Normal style applied before you begin formatting it. If it has another style, it's used as the "Based on" style for the new style, as described in the section "Basing one style on another," later in this chapter.

### 2. Right-click the paragraph and choose **Styles** → **Save Selection As a New Quick Style**.

The dialog box shown in Figure 3-6 appears.

*Quick Style* is the term Word uses to identify styles that appear in the Styles gallery.



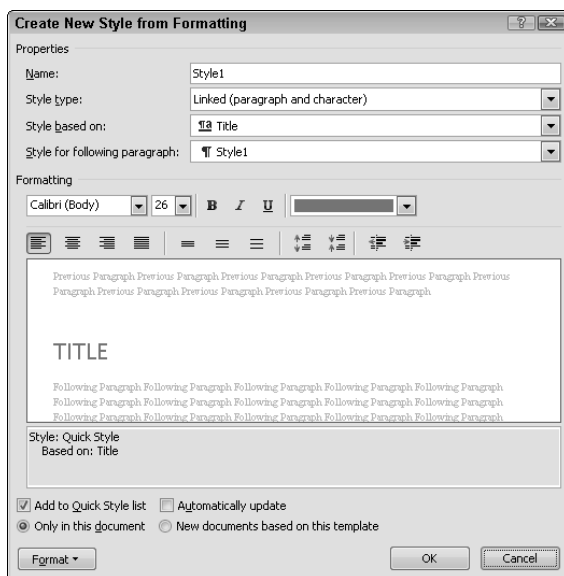
**Figure 3-6:**  
Creating a  
new style.

### 3. Enter a name for the style and click OK.

The style now appears in the Styles gallery, near whichever style was previously applied to the paragraph. (It's usually the Normal style, and the new style appears near the start of the Styles gallery.)

Only linked styles can be created by using this method. To create paragraph and character styles, you click the Modify button to open the Modify Style dialog box, shown in Figure 3-7. If you're changing an existing style, you can open the same dialog box by right-clicking the style in either the Styles gallery or the Styles pane and choosing Modify. In the first approach, the dialog box is named Create New Style from Formatting, but if you open the dialog box by using the other steps, it's named Modify Style. It's the same dialog box either way, so try not to worry about why Microsoft had to make this feature just a bit more confusing to use.

**Figure 3-7:**  
The Create New  
Style from  
Formatting  
dialog box.



The Create New Style from Formatting (or Modify Style) dialog box gives you complete control over the settings used in the style's definition. The controls within the “face” of the dialog box are the most commonly used, but you can use the Format button at the lower left to open additional dialog boxes with even more settings. All the power comes with a price — the Modify Style dialog box is one of the most complex in Word. If you have to use it, try to find a friend to help.

## *Adding and removing styles from the gallery*

You might find that you never use some of the styles in the Styles gallery. You can remove any style from the gallery by right-clicking the style and choosing Remove from Quick Style Gallery.

To add a style back into the Styles gallery, you have to open the Styles pane (press Ctrl+Alt+Shift+S or click the dialog box launcher in the lower-right corner of the Styles group), locate the style, and then right-click the style. From the menu that appears, choose Add to Quick Style Gallery. The Styles pane is shown later in this chapter, in Figure 3-8.

The other thing you might want to do with the items in the Styles gallery is change their order. If you just want to list them alphabetically, you can open the Styles pane, click the Options link, set the Select How List Is Sorted drop-down list to Alphabetical, and click OK.



For more control over the order of the items in the Styles gallery and the Styles pane, you need to use the Styles Management dialog box — arguably the most complex dialog box in all of Word. You can open the Manage Styles dialog box by clicking the Manage Styles button at the bottom of the Styles pane. The Recommend tab lets you specify the order in which styles should appear when the various styles lists are set to show in the As Recommended order (set using the Options link on the Styles pane).

## *Storing the look of your styles*

After the Styles gallery looks exactly the way you want, you might be so happy with what you've done that you want any new document you create to use those exact same settings. Not too surprisingly, Word offers an easy way to do that.

To set the styles that show in the Styles gallery for new documents, follow these steps:

### **1. Update the Styles gallery to have the styles you want.**

This step might involve changing the style set, changing the theme, modifying the styles in the set, adding or removing styles, and even creating your own styles. (I cover all these tasks earlier in this chapter.)

### **2. Click the Change Styles button and then select the Set As Default command.**

That's all there is to it. Go ahead. Try it. Press Ctrl+N and see whether your new document has the right settings. If not, ensure that the document you're working with truly has what you want to store.



In some cases, the command name might have changed to identify a specific template. When that happens, it means that rather than update the settings for all new documents created by using Ctrl+N or any other method that starts with a plain, blank document, you're changing the settings only for documents created with that template.

When you set the look for new documents, you don't create a separate style set or theme. Instead, you update the settings used in the Normal template. If you're working on a document and want to return to your custom default settings, use the Reset to Quick Styles from Template command on the Style Set menu and the Reset to Theme from Template command on the Themes gallery.

You can also update and save just the contents of the Styles gallery as a style set. The command to store a style set is found on the Style Set menu, which you access by clicking the Change Styles button and then selecting Style Set>Save As Quick Style Set. When you save a style set, Word prompts you to provide a name for the new style set. After you name and save the style set, it becomes available on the Style Set menu, and you can use it in any of your Word documents. You can save the current font, color, and

effects setting as a theme by using the Save Current Theme command on the Themes gallery on the Page Layout tab. This command works in the same fashion as saving a style set, with the newly saved theme becoming available in the Themes gallery. One big difference between style sets and themes is that themes become available in PowerPoint and Excel as well as in Word.



When you switch style sets, the styles in both sets are updated. Any style that's in use in your document but not in the new style set is left in the Styles gallery. Any style that's in the new style that wasn't showing previously is added.

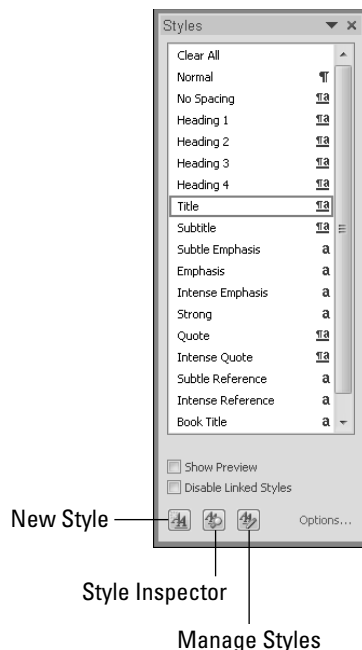
## Stepping Beyond the Styles Gallery

For most situations, the Styles gallery provides access to the styles you need and the commands to work with them. However, some situations require a larger list of styles, or you might want to work with your styles in ways not offered by the Styles gallery.

### Using the Styles pane

One of the most common needs when working with styles is to be able to choose from more styles than the number that can conveniently be displayed in the Styles gallery. For that task, you can use the Styles pane (shown in Figure 3-8), which you can open by clicking the dialog box launcher in the lower-right corner of the Styles group.

**Figure 3-8:**  
The Styles  
pane.



Rather than your having to search the Styles gallery to find which style is highlighted for the particular paragraph you're curious about, the Styles pane gives you the details on every style you have used in a document.

You apply a style from the Styles pane the same way as from the Styles gallery. To apply paragraph styles, place your cursor in the paragraph or select either the entire paragraph or parts of more than one paragraph and click the style you want to apply. To apply character styles, select the text and then click the style you want to apply.

The Styles pane is set to show as many styles as possible. If you make the pane wide enough, it even shows two or more columns of styles. As part of that, the style names are shown in the same font that's used for labels on the Ribbon. If you would rather see the styles formatted to preview the way they format text, select the Show Preview option.



The icon to the right of the Styles pane identifies the style type for each style — character (the *a* character), paragraph (the *pilcrow*, or paragraph mark, also shown in the Styles gallery next to paragraph styles), or linked (with both an *a* and a pilcrow). I cover the difference among these three types of styles in the section “Understanding Styles,” earlier in this chapter.



If you often end up applying linked styles to part of a paragraph when you meant to apply them to the entire paragraph, select the Disable Linked Styles option.

Hovering the cursor over a style displays a description of the style's formatting. Right-clicking a style displays a menu, including an option to select all text using that style.

The three buttons at the bottom of the Styles pane provide you with the ability to (from left to right) create a new style using the Create New Style from Formatting dialog box, gather more information about the current paragraph (see the later section “Using the Style Inspector”), or open the scariest dialog box in Word — Manage Styles.

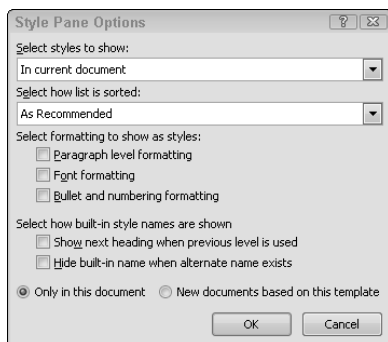
## ***Exploring the Styles Pane Options dialog box***

You can control which styles appear in the Styles pane and how the styles are sorted for both the Styles pane and the Styles gallery by using the Options link (in the lower-right corner). When you click the Options link, the Style Pane Options dialog box appears, as shown in Figure 3-9.

Microsoft certainly recommends that you set both the Select Styles to Show and Select How List Is Sorted drop-down menus to show the recommended styles. The recommended setting for Select Styles to Show is Recommended and for Select How List Is Sorted is As Recommended. (Maybe Microsoft is planning to trademark the word *recommended*.) The reason that these

settings are preferred in most cases is that they tell the controls that list styles to organize the information the way in which the template designer intended. However, you might have a different work style and want to change these settings. Most commonly, folks prefer setting Select Styles to display a listing of all styles in the current document, whether or not the template designer recommended each, and to sort the styles alphabetically.

**Figure 3-9:**  
The Style  
Pane  
Options  
dialog box.

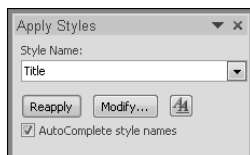


Previous versions of Word kept track of the font and paragraph formatting you had applied. Word 2003 displayed your applied formatting in the Styles and Formatting pane. With that information in hand, you could treat the formatting as though it were a style. This feature is most useful for tasks such as selecting all text with that formatting and changing it. In Word 2010, if you want to display the same information, you click the Options link in the Styles pane and then select the Font Formatting and Paragraph Level formatting check boxes (under Select Formatting to Show As Styles).

## Using the Apply Styles dialog box

If you're the sort of user who prefers to keep your hands on the keyboard, you might prefer working with the Apply Styles dialog box, shown in Figure 3-10. The advantage to using this approach is that you can display the dialog box by pressing Ctrl+Shift+S, typing the style name, and then pressing Enter to apply the style — all without moving your hands from the keyboard to your mouse.

**Figure 3-10:**  
Apply Styles  
dialog box.



As you type a style name, Word provides possible matches from the list of styles defined in the current document. If you don't like Word trying to guess what you're doing, you can turn off this feature by clearing the AutoComplete Style Names check box.

The Apply Styles dialog box also lets you create a new linked style by typing an unused name. If the style name you type isn't already defined, the Apply button becomes the New button. If you want to further refine the definition of the style before creating it, you can click the Modify button to open the Modify Style dialog box, shown earlier (refer to Figure 3-7).

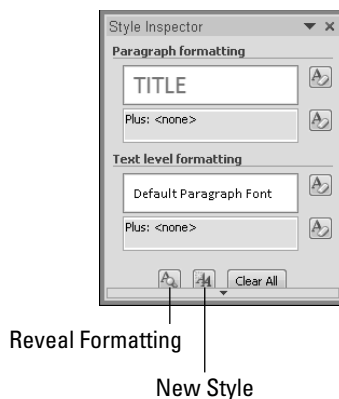
If you've applied character or paragraph formatting and now want to clear the formatting and reapply the paragraph style, you can do it by using the Apply Styles dialog box. Just type the style name for the paragraph and the Apply button becomes Reapply to let you know that you can clear the formatting and reapply the "pure" style.

Another control in the Apply Styles dialog box is the button with the double letter A on it. Click this button to open the Styles pane.

## *Using the Style Inspector*

As you work with styles, you might wonder which styles are applied to the current text. You might even want to know about any formatting that's hanging out in addition to the styles. To view these various levels of formatting, open the Styles pane and then click the Style Inspector button (labeled in Figure 3-8). This action opens the Style Inspector pane, shown in Figure 3-11.

**Figure 3-11:**  
The Style  
Inspector  
pane.



As described in the section "Understanding Styles," earlier in this chapter, all text derives its basic paragraph formatting from its paragraph style and might have additional direct paragraph formatting, formatting from a



character style, and additional direct character formatting. The magic of the Style Inspector is that it reveals each of these levels of formatting and allows you to remove them one level at a time. Here are your options:

- ◆ **Paragraph Formatting:** The large, white box in this section displays the current style for the paragraph. The button to the right resets the paragraph style to Normal. (Remember that all paragraphs in Word must have a paragraph style applied.)

Under this box but still in the Paragraph Formatting section is a list of any paragraph formatting that's applied to the entire paragraph. The button to the right clears all paragraph formatting that isn't part of the paragraph's style. Sometimes, character formatting also appears here if it's applied to the entire paragraph; the button on the right doesn't clear this character formatting but resets it so that it's shown correctly in the Text Level Formatting section.

- ◆ **Text Level Formatting:** The large box in this section reports the current character style. If the text has no character style applied, the text Default Paragraph Font is displayed. The button to the right clears the current character style.

As with the Paragraph Formatting section, any additional character formatting is shown in the box below. The button to the right clears the character formatting that comes from neither the paragraph nor character style.

To clear all formatting and reset the paragraph to the Normal style, you can use the Clear All button on the Style Inspector or the Clear Formatting button in the Font group on the Home tab.



The Reveal Formatting pane provides much greater detail about the formatting applied to the selected text. You can open the Reveal Formatting pane by clicking the leftmost button in the group at the bottom of the Style Inspector pane or by pressing Shift+F1.

## Using the Word 2003 Styles drop-down list

Previous versions of Word used a drop-down list on the Formatting toolbar to list the current style and to let you select which style to apply by either typing the style name (as you now can do in the Apply Styles dialog box) or selecting from a list. The Word 2010 Styles gallery and Styles pane both highlight the current style if it already appears in the list of displayed styles, but neither automatically scrolls to make that style visible. Therefore, you often can't tell at a glance which style is applied.

You can show the current style and provide yourself with an additional way to apply styles by adding the Word 2003 Styles drop-down list to your Quick Access toolbar by following these steps:

**1. Open the Word Options dialog box from the File tab.**

For more information about the Word Options dialog box, see Book I, Chapter 3.

**2. From the list of options on the left side of the dialog box, select Quick Access Toolbar.**

You can see the options for modifying it in the main window.

**3. With the Popular Commands list visible, scroll down and select Style.**

Note that two commands have similar names. You want the one that says Style, not Styles. The Styles entry adds a button to open the Styles pane.

**4. Click the Add button to move the Style control into the list of commands on the Quick Access toolbar.**

If you want, you can use the two arrows at the right of the dialog box to change the order of the commands on the Quick Access toolbar.

**5. Click OK.**

That's it. You can now see the current style with a quick glance at your Quick Access toolbar.

## *Better Living through Styles*

The use of styles is one key to using Word effectively. This list contains the best tips for simplifying your life by using styles correctly:

- ◆ **Always use styles.** This advice is somewhat redundant because, in Word, you *have* to use styles. Whether you realize it or not, every paragraph in Word is based on a style. If you don't use styles, the paragraphs are based on the utilitarian Normal style.

My point here is that for all except the simplest documents, create and apply styles rather than apply direct formatting to your paragraphs. In the long run, using styles rather than direct formatting saves you a great deal of time and grief. You might curse the computer while you climb the sometimes steep learning curve that comes along with using styles, but when you reach the top, you'll say to yourself, "That wasn't so hard."

- ◆ **Use the built-in Heading 1, Heading 2, and Heading 3 styles for your headings.** Word has three predefined heading styles. If you don't like the way they look, redefine them. By using Heading 1, Heading 2, and Heading 3, you can work with your headings in Outline view (see Book VI, Chapter 6) or create a table of contents (see Book VI, Chapter 1).

- ◆ **Whenever possible, create styles by example.** Just format a paragraph to have the look you want, right-click, and select *Styles* ⇨ *Save Selection As a New Quick Style*. Use the *Modify Style* dialog box only when you must.
- ◆ **Check out the style sets, themes, and templates that come with Word.** Microsoft has already done much of the hard work of creating styles for you. When you start to create a new document, check out the various templates available on Office Online (<http://office.microsoft.com>) to see whether any of them is suitable. If not, pick one that's close and modify it to suit your needs. For information on using templates, check out Book I, Chapter 3.
- ◆ **Use keyboard shortcuts to assign styles quickly.** The second fastest way to assign styles is to use keyboard shortcuts. Assign a keyboard shortcut to every style you use frequently. Don't bother with the ones you use infrequently, though — remembering the keyboard shortcuts you use frequently is hard enough. For information about assigning keyboard shortcuts, see the section “Assigning shortcut keys,” later in this chapter.
- ◆ **Base all text variants on the Normal style.** Most documents have several different types of paragraphs that are minor variations on normal text. For example, the bullet list paragraphs in this book are variations of the book's normal text paragraphs: They have the same typeface, point size, and line spacing, but their margins are different and they have bullets. Paragraphs such as bulleted lists should be formatted with styles based on the Normal style. That way, if you decide to make a sweeping change, such as move from 10- to 11-point type or switch from Times New Roman to Palatino, you can change the Normal style rather than change each style individually. For more information, see the section “Basing one style on another,” later in this chapter.
- ◆ **Use the Style for Following Paragraph field to automate your formatting.** The fastest way to assign styles is to have Word do it automatically. Set the *Style for Following Paragraph* field in the *Modify Style* or *New Style* dialog box. Then when you press Enter to create a new paragraph, Word automatically assigns the style. For more information, see the section “Setting the style of the next paragraph,” later in this chapter.
- ◆ **Use Space Before or Space After, but not both.** When you create paragraph styles, decide in advance whether you prefer to add extra space before or after the paragraphs. As much as possible, stick to your decision. If you have two adjacent paragraphs, the first with extra space after and the second with space before, you might end up with more space than you intend between paragraphs.

## *Neat Things to Do with Styles*

You can do much more with styles than create and apply them. The sections that follow chronicle some of the more interesting things you can do with styles. They're not only interesting but also somewhat more complex than the topics discussed earlier in this chapter. If you're not feeling technically minded, you might want to stop reading now.

### *Assigning shortcut keys*

Word enables you to assign keyboard shortcuts to your favorite styles. Then you can apply those styles by simply pressing the keyboard shortcut. To assign a shortcut key, follow these steps:

**1. Display the Styles pane.**

Press Ctrl+Shift+Alt+S or click the dialog box launcher in the lower-right corner of the Styles group on the Home tab.

**2. Point the cursor at the style you want to modify.**

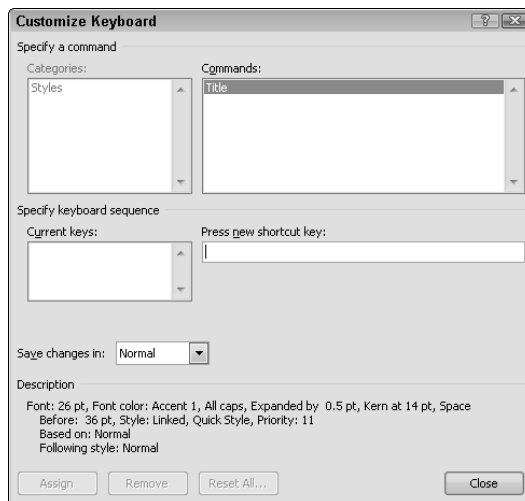
Don't click the style; just point the cursor at it.

**3. Click the down arrow that appears next to the style and then choose Modify from the menu that appears.**

The Modify Style dialog box appears.

**4. Click the Format button and then choose Shortcut Key.**

The Customize Keyboard dialog box appears, ready for you to assign a keyboard shortcut for the style. (See Figure 3-12.)



**Figure 3-12:**  
The  
Customize  
Keyboard  
dialog box.

5. Click in the **Press New Shortcut Key** text box and then press the key combination that you want to assign to the style.

When you press the keys, Word writes out the key combination for you. The plus sign indicates that the keys must be held down together.

6. **Verify that the shortcut isn't already in use.**

If you choose a command that's already in use, an "underwhelming" line appears under the **Current Keys** box to indicate that it's assigned and which command is using it. You can then decide whether you want to find a different shortcut to use or remove it from the command that already has it.

7. Click **Assign** to assign the keyboard shortcut.

8. Click **Close**; then click **OK** to get all the way out of there.

Keep these tidbits in mind when using keyboard shortcuts for styles:

- ◆ To remove a keyboard assignment you previously assigned, select it in the **Current Keys** list in the **Customize Keyboard** dialog box and then click the **Remove** button.
- ◆ The predefined heading styles already have keyboard shortcuts associated with them:
 

Ctrl+Alt+1	Heading 1
Ctrl+Alt+2	Heading 2
Ctrl+Alt+3	Heading 3
- ◆ You can create keyboard shortcuts by using virtually any combination of keys on the keyboard. The shortcuts can use the Shift, Ctrl, and Alt keys, either alone or in combination. For example, you can assign Ctrl+K, Alt+K, Ctrl+Shift+K, Ctrl+Alt+K, or even Ctrl+Alt+Shift+K.
- ◆ You also can create prefix keyboard shortcuts, such as Ctrl+Shift+I, 1. To activate this shortcut, you must press Ctrl+Shift+I and then release those keys and press the 1 key. Using this approach, you can create one prefix key to access a group of styles. To enter this style of shortcut, press the combination of keys you want to use as the prefix and then the specific key you want to use for the style.

## ***Basing one style on another***

Suppose that you create 20 different styles for various types of paragraphs in a complicated document, only to discover that your boss wants the entire document to have single line spacing rather than the ½ lines that was specified last week. Do you have to change all 20 styles to reflect the new spacing? Not if you set up your styles using base styles.

A *base style* provides formatting information for other styles. For example, you might have a style named *Bullet List* and you want to create a similar style named *Bullet List Last* that you use for the last paragraph in a series of bulleted paragraphs. The only difference between *Bullet List* and *Bullet List Last* is that *Bullet List Last* has additional space after the paragraph. Otherwise, the styles are identical. Base styles enable you to do this. In this case, *Bullet List Last* consists of all the formatting from its base style, *Bullet List*, plus six points of space afterward.

A style *inherits* all formats specified in its base style. If the base style changes, the changes are inherited, too. Any styles based on the style you change automatically reflect any changes you make to the base style.

However, a style can override the formats it inherits from the base style. For example, if a style doesn't specify a point size, any paragraphs formatted with the style inherits the point size from the base style. However, if a style specifies a point size, the point size of the base style is ignored.

Thus, if all 20 of your paragraph styles are based on the *Normal* style, you can change the font for all 20 styles by simply changing the font for the *Normal* style. (The exception is any style based on *Normal* that specifies its own font to override the font picked up from the *Normal* style. In that case, the style retains its own font.)

Here's the procedure for creating a style that's based on another style:

- 1. Choose the paragraph you want to format.**
- 2. Apply to the paragraph you selected the style you want to use as the base style.**
- 3. Change the formatting of the paragraph.**

Add whichever extra formats you want applied to the new style. These formats are added to the base style's formats.

- 4. Create the new style.**

The new style is based on the style originally applied to the paragraph. (For detailed steps, refer to the earlier section "Creating your own style.")



You can also set the base style in the *Create New Style from Formatting* dialog box, which opens when you click the *New Style* button on the *Styles* pane.

A style that serves as a base style may itself have a base style. For example, *Bullet List Last* may be based on *Bullet List*, which in turn may be based on *Normal*. In that case, the formats from *Normal*, *Bullet List*, and *Bullet List Last* are merged whenever you apply the style.

## Setting the style of the next paragraph

When you press Enter to create a new paragraph, the new paragraph normally assumes the same style as the previous paragraph. In some cases, you want to do exactly that. However, for some styles, the style of the following paragraph is almost always a different style. For example, a paragraph formatted with the Heading 1 style is rarely followed by another Heading 1 paragraph. Instead, a Heading 1 paragraph is usually followed by a Normal paragraph.

Rather than always change the style assigned to a new paragraph in these situations, you can specify the style you want assigned to the next paragraph by using the Modify Style dialog box. Then when you press Enter, the new paragraph is assigned the style you specified. This little trick can almost completely automate the chore of formatting your documents.

You can set the style for the following paragraph when you're creating a new style by using the New Style button on the Styles pane. In the Styles pane, click the New Style button at the bottom left of the pane to display the Create New Style from Formatting dialog box.

For existing styles, to set the style for the following paragraph, you use the Modify Style dialog box. Click the drop-down list next to the style you want to change and select the Modify option.



Examine the Style for Following Paragraph setting for each of your styles to see whether you can save yourself some work. Heading styles should specify Normal for the following paragraph, as should any other type of paragraph that usually occurs in singles. You might find other styles that should have this field set, too. For example, I have a Chapter Number style that specifies Chapter Title As Style for Following Paragraph.

## Showing the Style area

Adding the Word 2003 Style drop-down list to the Quick Access toolbar (as described earlier in the chapter) provides a way of seeing the style of your current selection at a glance. But wouldn't it be cool to be able to see, all at one time, which paragraph style was assigned to each paragraph? Well, I wouldn't have mentioned it if it weren't possible. Figure 3-13 shows a document in Draft view with the Style area displayed.

To show the current paragraph style in the Style area, follow these steps:

### 1. Make sure that you're in Draft view by checking the View tab.

If you aren't in Draft view, switch to it by clicking the Draft button.

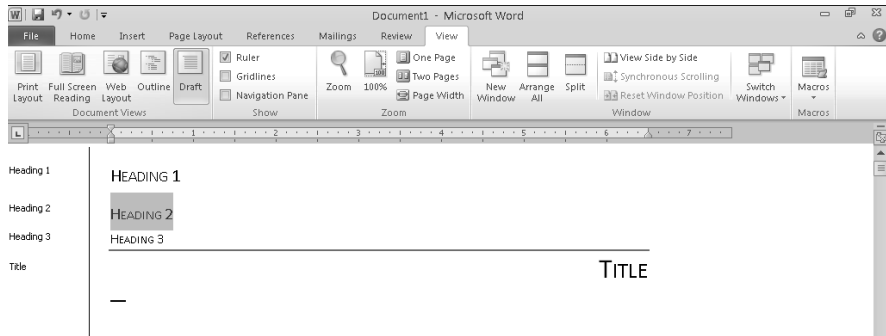
2. Select Options from the File tab to display the Word Options dialog box.
3. Select the Advanced option from the list on the left.
4. In the Display section of the long list of advanced options, type the width you want to use for the Style area in the text box labeled Style Area Pane Width in Draft and Outline Views.

A width of an inch generally works well.

5. Click OK.

The paragraph style for each paragraph now displays to the left of the text aligned with the first line of text in the paragraph.

**Figure 3-13:**  
A document  
with the  
Style area  
displayed.



After the Style area is visible, you can adjust its width by grabbing with the cursor the vertical line that separates the Style area from the document. You can omit the Style area by dragging this line all the way to the left. Or, you can follow the preceding steps and enter 0 as the width.

## *Storing styles in a template*

The easiest way to store styles in a template is to open the template directly and edit the styles within it. You can also save any style you're modifying by selecting the New Documents Based on This Template option in the Modify Style dialog box and then clicking OK. If you want to save all your style settings, follow these steps:

1. Open the Styles pane by pressing Ctrl+Shift+Alt+S or using the dialog box launcher for the Styles group on the Home tab.
2. Click the Manage Styles button (refer to Figure 3-8, where the button is labeled).



The Manage Styles dialog box appears. (You may recall that I consider it the scariest dialog box in all of Word. It's so scary that I don't even show you a picture of it.)

- 3. Select the New Documents Based on This Template option.**
- 4. Click OK.**

Styles stored in the template are available to any document that is created starting from that template. To make styles available for a variety of documents, consider storing them as a style set, as described in the earlier section "Storing the look of your styles."



# Chapter 4: Editing Techniques

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## *In This Chapter*

- ✓ Selecting and deleting text
- ✓ Copying and pasting text
- ✓ Using the Undo and Repeat commands
- ✓ Finding and replacing text

**A**t its heart, Word is editing software. They call it processing software, but it doesn't process much. It's for editing. It offers a lot of features that are involved with the editing of documents.

You would think that this topic is what the entire book is about. Not so fast, my friend — a special set of tools relates directly to the technique of editing. That is what I cover here — the good, the bad, and the ugly of the editing tools of Microsoft Word.

## *Selecting Text*

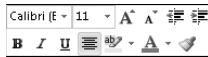
One basic editing skill is selecting text. After you select some text, you can delete it, copy it, move it, apply formatting to it, change its capitalization, and do all sorts of other neat stuff to it.

The easiest way to select text is to click and drag the mouse over the text you want to select. You can also use one of these mouse actions to select text:

- ◆ **To select all text between two points:** Click at the start of the block of text, hold down Shift, and click at the end of the block.
- ◆ **To select a single word:** Double-click anywhere on the word. Click, click.
- ◆ **To select an entire paragraph:** Triple-click anywhere on the paragraph. Click, click, click.
- ◆ **To select an entire sentence:** Hold down Ctrl and click anywhere in the sentence.
- ◆ **To select a column of text:** Hold down Alt, click and hold the mouse button, and drag. Drag the mouse left or right to increase or decrease the width of the column selected, and drag the mouse up or down to extend the column up or down. (This technique is especially useful if you arrange text into columns by using tabs and you want to rearrange the columns.)

Note that after you select some text, a miniature formatting toolbar appears to the upper right of the cursor, as shown in Figure 4-1. You can use the toolbar to quickly format a selection with some of the basic formatting tools discussed in Chapter 2 of this minibook.

**Figure 4-1:**  
Mini toolbar.



## *Using the invisible selection bar*

Way off to the left of your text is an invisible, secret region of the Word screen that's officially named the *selection bar*. To find it, slide the mouse over toward the left edge of the screen (within the left margin area in Print Layout view) until the cursor turns into a rightward-pointing arrow. When the cursor changes, say "Gotcha!" quickly so that Word knows you're on to its game.

Here are a few selection tricks that use the selection bar:

- ◆ **To select an entire line of text:** Click the selection bar once. Click.
- ◆ **To select an entire paragraph:** Double-click the selection bar. Click, click.
- ◆ **To select the entire document:** Triple-click the selection bar. Click, click, click.
- ◆ **To select several paragraphs:** Double-click the selection bar to select the first paragraph, hold down the mouse button after the second click, and drag the mouse up or down the selection bar to select additional paragraphs.

## *Selecting with the keyboard*

If you're allergic to the mouse, you can use the keyboard shortcuts summarized in Table 4-1 to select text.

Table 4-1	Keyboard Shortcuts for Selecting Text
<i>Keyboard Shortcut</i>	<i>What It Does</i>
Ctrl+A	Selects the entire document
Ctrl+Num Pad 5	Selects the entire document
Alt+Num Pad 5	Selects the entire table (NumLock must be off for this shortcut to work.)

<i>Keyboard Shortcut</i>	<i>What It Does</i>
Shift	Extends the selection (if you hold down the Shift key) as you move the insertion point by using the arrow keys
F8	Places Word in Extend mode, which lets you extend the selection by using the arrow keys without holding down the Shift key
Ctrl+Shift+F8	Extends a column selection; similar to using the Alt key with the mouse



After you press F8 to enter Extend mode, you can press it again to select the current word (similar to double-clicking). Press F8 a third time to select a sentence. Press it a fourth time to select the entire paragraph, and a fifth time to select the entire document. To turn off Extend mode, press Esc.

## Selecting cells in a table

If you create a table, you can use these tricks to select individual cells, columns, or rows:

- ◆ **To select several cells:** Click in the cell that is your starting point, and then click and drag across the cells you want to select.
- ◆ **To select an entire column:** Click the top gridline of the column. The cursor changes to a down arrow when it's in position to select the column. You can select several columns by dragging the mouse in this position.
- ◆ **To select an entire row:** Click the selection bar to the left of the row. To select several rows, drag the mouse in the selection bar.

For the scoop on how to build a table, talk to a carpenter — or see Book IV, Chapter 4.



To delete a table or cells within a table, highlight the selection to be deleted and press Backspace. To delete all text within a table or within selected cells, highlight the selection to be deleted and press Delete.

## Deleting Text

Deleting text is one of the basic skills of good editing. Some people think they're such good writers that they shouldn't have to delete anything. Not me. I delete about half of what I write. And that's probably not enough.

Word has many ways to delete text. The most basic deletion technique is to delete characters one at a time by pressing one of these two keys:

- ◆ **Backspace:** Deletes the character to the *left* of the insertion point
- ◆ **Delete:** Deletes the character to the *right* of the insertion point

If you immediately catch a typing mistake, press the Backspace key to obliterate it and then type the correct text. Using the Delete key is more appropriate when you discover your mistake a few moments after the fact. Then you can move the insertion point to the beginning of the text in error, use the Delete key to erase the mistake, and then type the correct text.



You can also use the Backspace and Delete keys in combination with the Ctrl key to delete whole words. The same distinction between Backspace and Delete applies when you use the Ctrl key: pressing Ctrl+Backspace deletes the previous word; Ctrl+Delete deletes the next word.

**Note:** Ctrl+Backspace and Ctrl+Delete work best when the insertion point is positioned between words. If the insertion point is in the middle of a word, Ctrl+Backspace and Ctrl+Delete delete only part of the word. Ctrl+Backspace deletes everything from the insertion point to the beginning of the word, and Ctrl+Delete deletes everything from the insertion point to the end of the word.



If you select text before you use the Backspace or Delete key, the forward and backward distinction between these two keys fades into the distance. With text selected, the Backspace and Delete keys simply delete the selected text. You can use this ability to delete large amounts of text with one blow. For example:

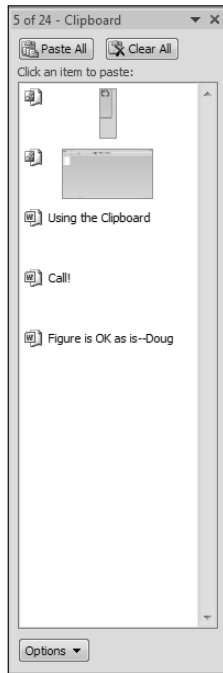
- ◆ **To delete a sentence:** Hold down the Ctrl key and click in the sentence to select it, and then press Delete or Backspace.
- ◆ **To delete a paragraph:** Triple-click the paragraph to select it and then press Delete or Backspace.
- ◆ **To delete the entire document:** (This must be an act of extreme desperation, I would think.) Press Ctrl+A to select the entire document and then press Delete or Backspace.



If you become overzealous with the Delete or Backspace key, you can restore your smitten text by pressing Ctrl+Z to summon the Undo command. For more information, see the section “Undo and Repeat,” later in this chapter.

## *Using the Clipboard*

The nifty Clipboard task pane feature lets you gather as many as 24 different items of text or graphics from Word or any other Office application (such as Excel or PowerPoint) and then selectively paste them into your document. Figure 4-2 shows the Clipboard task pane in action.



**Figure 4-2:**  
The  
Clipboard  
task pane.

You can summon the Clipboard task pane in a couple ways so that you can work with the items you add to the Clipboard:

- ◆ Click the dialog box launcher in the Clipboard group on the Home tab on the Ribbon.
- ◆ In the Clipboard task pane, click the Options button and then select the option labeled Show Office Clipboard When Ctrl+C Pressed Twice. Then you can press Ctrl+C twice to launch the task pane.

To paste an item from the Clipboard task pane, first click to mark the location in the document where you want to insert the item and then click the item in the Clipboard that you want to insert.

If you like everything you copied to the Clipboard, you can paste it all into your document in one fell swoop by clicking the Paste All button. This button lurks near the top of the Clipboard task pane.

To remove an item from the Office Clipboard, point to the item, click the drop-down list arrow, and choose Delete from the menu that appears. To clear everything from the Clipboard, click the Clear All button, which appears near the top of the Clipboard task pane.



For the Clipboard to collect items while it isn't displayed, you must open the Clipboard task pane, click the Options button, and then select the Collect without Showing Office Clipboard option.

## *Dragging and Dropping*

Drag-and-drop editing (or *dragon dropping*) helps you to move text from one location in a document to another by using only the mouse, without using the Clipboard. You simply highlight the text you want to move and use the mouse to drag the text to a new location. When you release the mouse button, the text is cut from its original location and pasted to the new location.



If you hold down the Ctrl key while dragging text, you can copy the text to the new location rather than move it. In other words, the text isn't deleted from its original location.

You can drag and drop text between two open documents, which is easier if both documents are visible onscreen. To ensure that both documents are visible, click the Arrange All button on the View tab on the Ribbon. To drag text from one open document to another without rearranging your windows, try this technique:

1. **Select the text you want to drag to another document.**
2. **Click within the selected text and hold the mouse button.**
3. **While still holding down the mouse button, press Alt+Tab to switch to the document in which you want to drop the text.**  
*Note:* Continue to hold down the Alt key and press Tab as many times as necessary to switch to the right document.
4. **While still holding down the mouse button, drag the text to the location where you want to drop it.**
5. **Release the mouse button to drop the text.**

By my reckoning, this method is more trouble than it's worth. I'd put my money on simple copy and paste (Ctrl+C and Ctrl+V) any day.



If you don't like this feature — and you may well find that you don't — you can disable it by choosing File→Options and then clicking the Advanced tab. Deselect the Allow Text to Be Dragged and Dropped check box and click OK.

## *Undoing and Repeating*

Using the Undo command is one of the best ways to become a Word guru. Without the Undo command, you would be afraid of experimenting with



Word for fear of losing your document. But with this command at hand, you can try anything you want, knowing that the worst that can happen is that you might have to use the Undo command to undo a mistake.

You can access the Undo command from the Quick Access toolbar, but Undo is useful enough that you should simply memorize its keyboard shortcut: Ctrl+Z. While you're at it, go ahead and memorize Ctrl+Y, the keyboard shortcut for an almost equally useful command: Repeat. The following minitable summarizes these shortcuts for your reference:

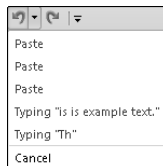
<b>Keyboard Shortcut</b>	<b>What It Does</b>
Ctrl+Z	Undoes the previous action.
Ctrl+Y	Repeats the previous action. If the previous action was Undo, Ctrl+Y redoes the undone action.

The Repeat command, as its name implies, repeats the last action. If you just used the Font dialog box (by using the dialog box launcher in the Font group on the Home tab on the Ribbon) to make a bevy of formatting changes all at one time, select some other text that you want similarly formatted and then press Ctrl+Y. By using this Repeat command, you can apply the same formats to the other text.

The Repeat command repeats just about any action you can complete in Word. But when the most recent command is Undo, the Repeat command becomes the Redo command: It redoes the action undone by the Undo command. Undo and Redo are a perfect combination for people who can't decide whether they like something.

Word keeps track of more than one recent action. In fact, you can undo hundreds of recent actions. I don't think undoing more than one or two at a time is a good idea, but who am I to second-guess what you do with Word? To undo more than one action at a time, click the drop-down list of the Quick Access toolbar's Undo button to reveal all undoable actions. Drag the mouse to select the actions you want to undo, as shown in Figure 4-3. Then release the mouse button to undo them all. The Redo button on the Quick Access toolbar has a similar capability to redo multiple undone actions.

**Figure 4-3:**  
The Undo  
drop-down  
list.



## Finding and Replacing

The Find command enables you to locate specific text in your document. For example, you might remember that somewhere in your 200-page report you discussed the famous Bandersnatch, but you can't recall exactly where. So you fire up the Find command and ask it to find the first mention of Bandersnatch in your document.

You might then decide that whenever you mention the Bandersnatch, you should add the word *Frumious*. So you then summon the Replace command to replace all occurrences of *Bandersnatch* with *Frumious Bandersnatch*.



In previous versions of Word, you used the Find and Replace dialog box to find and replace text. In Word 2010, the Find function is now a part of the Navigation pane, which appears on the left side of the screen. Using the familiar Ctrl+F keyboard combination or clicking the Find button in the Ribbon now summons the Navigation pane rather than the Find and Replace dialog box. If you want to use the old-style Find command, see the section "Searching, the old-fashioned way," later in this chapter.

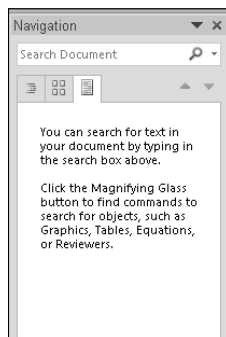
### Finding text

You can use the Find command to find text anywhere in a document. Just follow these steps:

1. **Choose the Find button in the Editing group on the Home tab or press Ctrl+F to summon the Navigation pane.**

See Figure 4-4 for a glimpse of this pane.

**Figure 4-4:**  
Using the  
Navigation  
pane to find  
text.

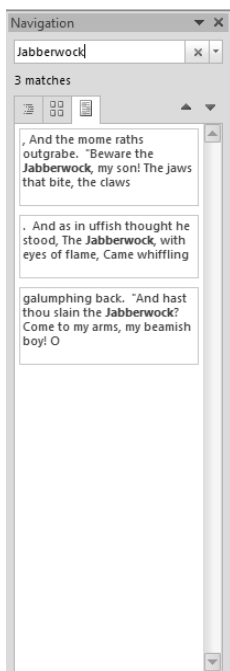


2. **Type the text you want to find in the Search Document field.**

For example, type **Bandersnatch**.

### 3. Wait a moment.

No need to click anything. As soon as you finish typing, Word searches for the text you entered and displays the results in the Navigation pane, as shown in Figure 4-5.



**Figure 4-5:**  
The  
Navigation  
pane  
displays  
search  
results.



### 4. Click a search result to move to that part of the document.

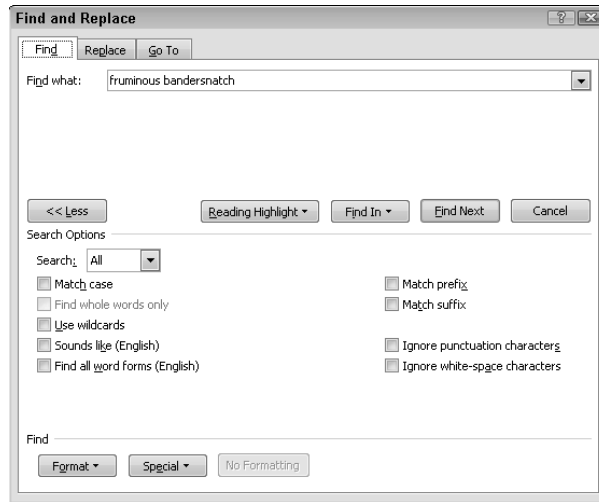
Here are a couple of hints to keep in mind:

- ◆ If Word doesn't find the search text, check your spelling. You might have spelled it wrong in the Search Document field.
- ◆ You can bail out of the Navigation pane at any time by clicking the Close button in the upper-right corner of the pane.

## Searching the Old-Fashioned Way

If you prefer to search the old way, you can bring up the old-style Find and Replace dialog box by clicking the down arrow that appears to the right of the magnifying glass button in the Navigation pane. Alternatively, you can

click the Replace button in the Ribbon and then click the Find tab in the Find and Replace dialog box. The Find tab has several advanced search options that initially aren't displayed, but you can reveal them by clicking the More button, shown in Figure 4-6. The following sections describe these advanced search features.



**Figure 4-6:**  
The Find  
and Replace  
dialog box.

## Changing direction

You can change the direction of Word's search by changing the setting in the Search drop-down list. Three choices are available when choosing a search direction:

- ◆ **All:** Searches the entire document without regard to the position of the insertion point.
- ◆ **Down:** Starts the search at the position of the insertion point and searches forward toward the end of the document.
- ◆ **Up:** Searches backward from the insertion point, toward the beginning of the document.

Both the Down and Up options search until they reach the bottom or top of the document; then they ask whether you want to continue searching the rest of the document.



To hide the Search Options section, click the Less button (which was previously the More button).

## Refining your findings

The check boxes at the bottom of the expanded Find and Replace dialog box let you refine your searches in sometimes helpful ways, as described in the following sections.

### Matching case

Select the Match Case check box before beginning the search if it matters whether the text appears in upper- or lowercase letters. This option is handy when you have, for example, a document about Mr. Mathers the math teacher.

### Finding whole words

Speaking of Mr. Mathers the math teacher, select the Find Whole Words Only check box to find your text only when it appears as a whole word. If you want to find the text where you talk about math teachers in general for example, type **math** in the Find What text box and select the Find Whole Words Only check box. That way, the Find command looks for *math* as a separate word and doesn't show you the *math* in *Mathers*.

### Using wildcards

Select the Use Wildcards check box if you want to include wildcard characters or other search operators in the Find What field. Table 4-2 summarizes the search operators you can use if you select this option.

**Table 4-2 Advanced Search Operators for the Find Command**

Operator	What It Does
?	Finds a single occurrence of any character. For example, <i>f?t</i> finds <i>fat</i> or <i>fit</i> .
*	Finds any combination of characters. For example, <i>b*t</i> finds any combination of characters that begins with <i>b</i> and ends with <i>t</i> , such as <i>bat</i> , <i>bait</i> , <i>ballast</i> , or <i>bacteriologist</i> .
#	Finds any numerical digit.
[abc]	Finds any character enclosed in the brackets. For example, <i>b[ai]t</i> finds <i>bat</i> or <i>bit</i> but not <i>bet</i> or <i>but</i> .
[a-c]	Finds any character in the range of characters enclosed in the brackets. For example, <i>b[a-e]t</i> finds <i>bat</i> or <i>bet</i> but not <i>bit</i> or <i>but</i> .
[!abc]	Finds any character except the ones enclosed in the brackets. For example, <i>b[!ai]t</i> finds <i>bet</i> or <i>but</i> but not <i>bat</i> or <i>bit</i> .
@	Finds one or more occurrences of the preceding character. For example, <i>10@</i> finds <i>10</i> , <i>100</i> , or <i>1000</i> .

(continued)

**Table 4-2 (continued)**

<i>Operator</i>	<i>What It Does</i>
{ <i>n</i> }	Specifies that the preceding character must be repeated exactly <i>n</i> times. For example, 10{2} finds 100 but not 10 or 1000.
{ <i>n</i> ,}	Specifies that the preceding character must be repeated at least <i>n</i> times. For example, 10{2,} finds 100 or 1000 but not 10.
{ <i>n</i> , <i>m</i> }	Specifies that the preceding character must be repeated from <i>n</i> to <i>m</i> times. For example, 10{2,3} finds 100 or 1000 but not 10 or 10000.
<	Finds the following text only if it appears at the beginning of a word. For example, <pre finds <i>predestined</i> and <i>prefabricated</i> but not <i>appreciate</i> or <i>apprehend</i> .
>	Finds the preceding text only if it appears at the end of a word. For example, ing> finds <i>interesting</i> and <i>domineering</i> but not <i>ingenious</i> or <i>ingest</i> .

***First word, short, sounds like. . .***

Select the Sounds Like check box if you aren't sure exactly how to spell the text for which you're searching. Word can search for words that are pronounced the same as the word you're searching for. For example, if you search for **your** with the Sounds Like option on, Word stops when it finds *you're*. Don't expect much from this option, however.

***Finding all word forms***

If you select the Find All Word Forms check box, Word looks for alternative forms of most verbs. For example, if you search for **run**, Word finds *runs*, *running*, and *ran*. And, the program is smart enough to know about certain oddball words, such as *go*: If you search for **go**, Word finds not only *goes*, *going*, and *gone* but also *went*. Searching for **be** finds *is*, *was*, *am*, *were*, *being*, and *been*.

Don't expect miracles, however. Find All Word Forms doesn't pick up every imaginable word form, especially where nouns are concerned. For example, a search for **introduction** doesn't pick up *introductory*, and **religion** doesn't catch *religious*. The Find All Word Forms option is more adept at finding alternative word forms for verbs than for nouns.

***Ignorance is not bliss***

Ignoring punctuation or white spaces *can* be bliss:

- ◆ The **Ignore Punctuation Characters** check box is useful to find out whether you were *online* or *on-line* at the click of the mouse.
- ◆ The **Ignore White-Space Characters** check box is useful to find out whether you typed *white-space* or *white space*, or *cell phone* or *cellphone*.

## Finding formats

The Format button at the bottom of the Find and Replace dialog box (refer to Figure 4-6) lets you choose the type of format you want to search for from the pop-up menu. The following options are available:

- ◆ **Font:** Search for specific font formatting. You can search for specific fonts or for font formatting, such as bold, italics, and font size.
- ◆ **Paragraph:** Search for specific paragraph formatting, such as indentation and alignment.
- ◆ **Tabs:** Search for paragraphs with specific tab settings.
- ◆ **Language:** Search for paragraphs formatted for a particular language.
- ◆ **Frame:** Search for specific frame formatting.
- ◆ **Style:** Search for paragraphs formatted with a particular style.
- ◆ **Highlight:** Search for highlighted text.



Make sure that the Find What field itself is blank; otherwise, the Find command searches for specific text formatted with the style you specify.

## Finding special characters

The Special button at the bottom of the Find and Replace dialog box (refer to Figure 4-6) lets you search for special characters such as em-dashes and annotation marks. When you click this button, a list of special characters you can search for appears, as shown in Figure 4-7. Select the character you want to search for and click Find Next to begin the search.

Paragraph Mark  
Tab Character  
Any Character  
Any Digit  
Any Letter  
Caret Character  
Section Character  
Paragraph Character  
Column Break  
Em Dash  
En Dash  
Endnote Mark  
Field  
Footnote Mark  
Graphic  
Manual Line Break  
Manual Page Break  
Nonbreaking Hyphen  
Nonbreaking Space  
Optional Hyphen  
Section Break  
White Space

**Figure 4-7:**  
The Special  
button drop-  
down list.

When you select a special character, Word inserts a code into the Find What text box. If you know the code, you can bypass the Special button and its huge menu by typing the code directly into the Find What field. Table 4-3 summarizes the codes.

<b>Table 4-3                      Search Codes for Special Characters</b>	
<i>Character</i>	<i>Code</i>
Paragraph mark	^p
Tab character	^t
Any character	^?
Any digit	^#
Any letter	^\$
Section character	^%
Paragraph character	^v
Caret character	^^
Column break	^n
Em dash	^+
En dash	^=
Endnote mark	^e
Field	^d
Footnote mark	^f
Graphic	^g
Manual line break	^l
Manual page break	^m
Nonbreaking hyphen	^~
Nonbreaking space	^s
Optional hyphen	^-
Section break	^b
White space	^w

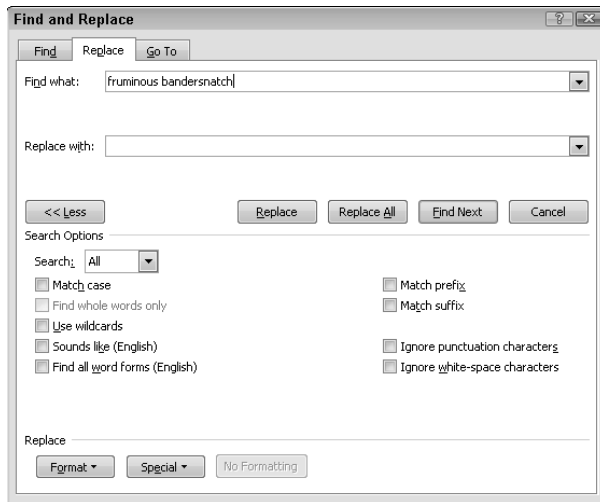
## ***Replacing text***

You can use the Replace command in the Editing group on the Home tab to replace all occurrences of one bit of text with other text. The following steps show you the procedure:



1. Choose the Replace command in the Editing group on the Home tab or press Ctrl+H.

The Find and Replace dialog box appears with the Replace tab selected, as shown in Figure 4-8.



**Figure 4-8:**  
The Replace  
tab of the  
Find and  
Replace  
dialog box.

2. Type in the Find What text box the text you want to find.  
For example, type **Bandersnatch**.
3. Type the text you want to substitute for the Find What text in the Replace With text box.

For example, type **Fruminous Bandersnatch**.

4. Click the Find Next button.

When Word finds the text, it highlights it onscreen.

5. Click the Replace button to replace the text.
6. Repeat the Find Next and Replace sequence until you finish.

If you're absolutely positive that you want to replace all occurrences of your Find What text with the Replace With text, click the Replace All button. Taking this step automatically replaces all remaining occurrences of the text.



Replace All can be hazardous to the health of your document. You're bound to encounter at least one spot where you don't want the replacement to occur. Replacing the word *mitt* with *glove*, for example, changes *committee* to *comgloveee*. (Imagine the confusion *that* could cause.) So be cautious before you click that Replace All button and use the More options.

## Avoiding Overtyping mode

Word has the evil editing feature Overtyping mode. When you're in *Overtyping mode*, any text you type obliterates the text onscreen. In Overtyping mode, typing a character replaces the character to the right of the insertion point with the character you type. Fortunately, turning on this feature is no longer as easy as accidentally pressing the Insert key.

Now you have to enable the Insert key to toggle Overtyping mode on and off by following the steps in this sidebar. If you prefer to use Overtyping mode, obliterating all text in your path, you need to tell the status bar to let you know when Word is in Overtyping or Insert Mode. Here's the information you need:

**1. Choose File➤Options and then click the Advanced tab.**

This step opens the Advanced tab of the Word Options dialog box.

**2. To enable the Insert key to be the Overtyping toggle key, select the Use the Insert Key to Control Overtyping Mode check box.**

**3. Click OK.**

**4. To turn on the status bar notification, right-click the status bar at the bottom of the window and choose Overtyping from the menu that appears.**

Now the word *Insert* appears on your status bar. When you press the Insert key to use Overtyping mode, the word *Insert* changes to *Overtyping*, indicating that Overtyping mode is on.

To turn off Overtyping mode, deselect the Use the Insert Key to Control Overtyping Mode check box on the Advanced tab of the Word Options dialog box, which you can find by following Step 1 in this list.

As with the Find command, you can click the More button to expand the dialog box so that additional options are visible (refer to Figure 4-5). You can then use the Match Case, Find Whole Words Only, Use Wildcards, Sounds Like, and Find All Word Forms options. The last option is even smart enough to properly replace alternative word forms with the correct version of the replacement text. For example, if you replace **run** with **walk**, Word replaces *running* with *walking* and *ran* with *walked*.



Because Word is not 100 percent confident in its capability to properly replace all alternative word forms, you see a warning message if you select the Find All Word Forms option and click Replace All. Find All Word Forms is tricky enough that you should verify each replacement.

# Chapter 5: All about AutoCorrect and Its Siblings

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## In This Chapter

- ✓ Using AutoCorrect
- ✓ Formatting with AutoFormat
- ✓ AutoFormatting as you type
- ✓ Inserting AutoText

**T**his chapter covers several related features in Word that attempt to automate the process of creating documents. AutoCorrect automatically corrects common spelling errors, and AutoFormat applies formatting automatically as you type. Another feature, AutoText, lets you store common words or complete paragraphs (or even several pages) that you can insert into your document with just a click of the mouse.

## Using AutoCorrect

The AutoCorrect feature in Word monitors your typing, carefully watching for common typing mistakes and fixing them quicker than you can say “Bob’s your uncle.” For example, if you type *adn*, AutoCorrect changes it to *and*. A misspelled *teh* becomes *the*, and *recieve* becomes *receive*. You get the idea. AutoCorrect has other features as well: It corrects capitalization, including accidental use of the Caps Lock key, and it lets you insert special symbols.

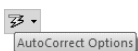
If you don’t like a change made by AutoCorrect, press Ctrl+Z or click the Undo button on the Quick Access toolbar to undo the change. Alternatively, you can play with the AutoCorrect Options button, as I describe in the following steps:

- 1. When Word automatically makes a correction to your text, move the insertion point to the changed word.**

correct

Click in the word or use the arrow keys to move the insertion point to it. When you reach the changed word, a little blue rectangle appears beneath the modified text, as shown in the margin.

- 2. Point directly at the blue rectangle until the insertion point changes to an arrow pointer.**



The AutoCorrect Options button magically appears in place of the blue rectangle, as shown in the margin.

**3. Click to reveal a menu.**

The menu includes these commands:

- *Undo Automatic Corrections That I Don't Want You to Do:* This option is the same as pressing Ctrl+Z or clicking the Undo button on the Quick Access toolbar. Because both these alternatives are easier than hunting for the AutoCorrect Options menu, I doubt you'll use this command often.
- *Stop Doing That:* This menu command doesn't actually say, "Stop Doing That." Instead, it offers to stop making whichever type of AutoCorrect change you just made. For example, if AutoCorrect automatically capitalizes the first letter of a sentence, this command is named Stop Automatically Capitalizing the First Letter of a Sentence. You can choose this command to disable the particular AutoCorrect action that led you to find the AutoCorrect Options menu.
- *Control AutoCorrect Options:* Opens the AutoCorrect Options dialog box so that you can further customize the AutoCorrect options.

**4. Choose the command you want to apply and be done with it.**

If you find the AutoCorrect Options button to be more of an annoyance than a help, you can turn it off by choosing File⇨Options and then clicking the Proofing tab. Next, click the Autocorrect Options button and then deselect the Show AutoCorrect Options Buttons check box on the AutoCorrect tab.

## *Using AutoFormat*

The AutoFormat feature as it was known in the past is no longer available. Word's AutoFormat feature cleans up your document and fixes common formatting problems. AutoFormat tries to deduce such information as which paragraphs in your document should be formatted as headings or which paragraphs should be bulleted or numbered lists. It doesn't always get it right, so you need to carefully review the changes it makes.

You can, however, add the AutoFormat button to the Quick Access toolbar:

- 1. Choose File⇨Options.**
- 2. Click the Quick Access Toolbar tab.**
- 3. In the Choose Commands From drop-down list, select All Commands.**
- 4. Find AutoFormat in the All Commands list and then click Add.**



You can adjust the button's position on the toolbar by using the up and down arrows. Also, you can place separators between commands to help organize your Quick Access toolbar.

After you have added the AutoFormat button to the Quick Access toolbar, you can use the button by following these steps:

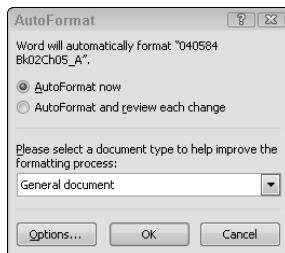
**1. Save your document.**

AutoFormat performs drastic surgery on your document, so you should save it first. That way, if you don't like what AutoFormat does, you have a saved copy to fall back on.

**2. Click the AutoFormat button on the Quick Access toolbar.**

The AutoFormat dialog box opens, as shown in Figure 5-1.

**Figure 5-1:**  
The  
AutoFormat  
dialog box.



**3. Click OK.**

AutoFormat reviews your entire document and makes whatever changes it deems necessary to spiff it up.

**4. Review the changes.**

Look over your document carefully to make sure you like the way it looks.

If AutoFormat makes a complete mess of your document, use the Undo command (click the Undo button on the Quick Access toolbar or press Ctrl+Z) to restore your document to its previous condition.

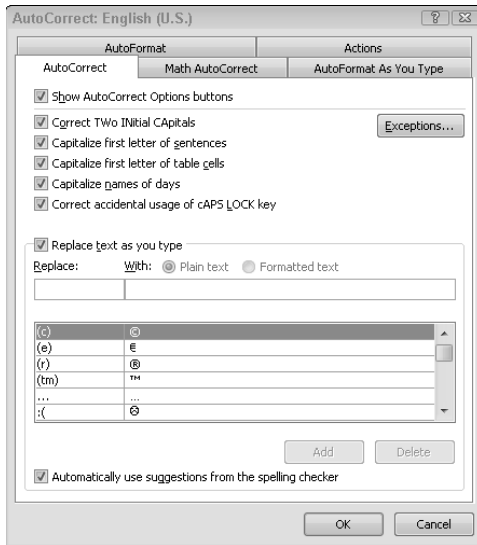


If you don't trust AutoFormat, select the AutoFormat and Review Each Change option in the AutoFormat dialog box. Then AutoFormat gives you an opportunity to review each change.

## Setting AutoFormat Options

You can control the changes made by AutoFormat by calling up the AutoCorrect dialog box, shown in Figure 5-2. To display this dialog box, choose File→Options and then click the Proofing tab. Then click the AutoCorrect Options button and select the AutoFormat tab. (Alternatively, if you've added the AutoFormat button to the Quick Access toolbar, you can choose it and then click the Options button.)

**Figure 5-2:**  
The  
AutoCorrect  
dialog box  
with the  
AutoCorrect  
tab  
selected.



You can find most of the AutoFormat options on the AutoFormat tab or the AutoFormat As You Type tab of the AutoCorrect dialog box, which I describe in the next section. Because AutoFormat As You Type is a more interesting and useful feature, I describe the options in the next section rather than here.

## *Using AutoFormat As You Type*

The Word AutoFormat As You Type feature automatically improves the formatting of documents written with little concern for appearance. This feature applies document formatting as you type, so it's closely related to the AutoCorrect feature. In fact, you find the options for controlling AutoFormat As You Type in the same dialog box as the options for controlling AutoCorrect. Choose File→Options and then click the Proofing tab. Then click the AutoCorrect Options button. (Alternatively, if you've added the AutoFormat button to the Quick Access toolbar, you can choose it and then click the Options button.)

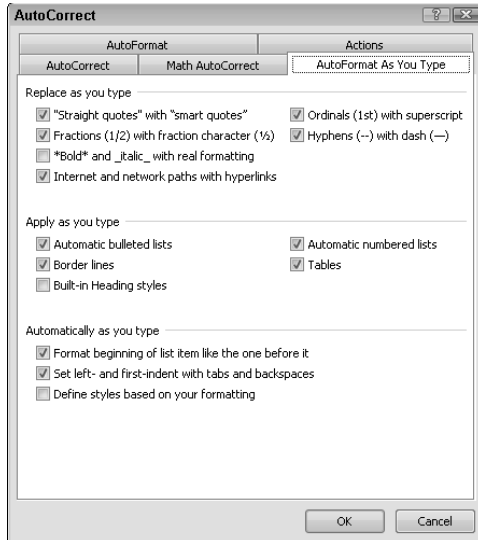
Click the AutoFormat As You Type tab to display the options shown in Figure 5-3. I describe the options in detail in the following sections.

### *Replace as you type*

The first section of the AutoFormat As You Type tab hosts items that are automatically replaced as you type them. These items work essentially the same as AutoCorrect items: When you type a particular bit of text, Word steps in and replaces the text with other, more appropriate text.

The following sections summarize the Replace As You Type options.

**Figure 5-3:**  
AutoCorrect  
dialog box  
with the  
AutoFormat  
As You  
Type tab  
selected.



### "Straight quotes" with "smart quotes"

This option tells Word to replace ordinary apostrophes and quotation marks automatically with curly apostrophes and quotes. The trick of using quotes is figuring out whether to use the left or right variety of curly quote or apostrophe. The left quote appears to the left of quoted material; the right quote or apostrophe appears on the right. Word does its best to figure out which to use and usually gets it right. If a character immediately follows the apostrophe or quote, Word replaces it with a left quote or apostrophe. If a nonspace character is immediately before the quote or apostrophe, Word replaces it with a right quote or apostrophe. Verdict: Thumbs up, with the following caveats.

The Smart Quotes feature works most of the time, but it bombs when you want to use a simple curly apostrophe. For example, try typing **Stop 'n Go**. You can't do it: Word insists on turning the apostrophe the other way 'round. (See, I did it again: Bet you can't!)



Okay, here's the secret to getting these apostrophes right: Simply type *two* apostrophes in a row. Word curls them both, the first one left and the second one right: ". Now go back and delete the first one.

Another way to do it is to hold down Ctrl and press the apostrophe key twice. This trick omits the left apostrophe.



Smart Quotes is such a useful feature that you have little reason to turn it off. If you need to type an ordinary, noncurled apostrophe or quote once in a while, just type the apostrophe or quote and press Ctrl+Z (Undo).

## ***Ordinals (1st) with superscript***

This option replaces ordinal numbers, such as 1st, 2nd, and 3rd with properly formatted superscripts: 1<sup>st</sup>, 2<sup>nd</sup>, and 3<sup>rd</sup>. AutoCorrect can also accomplish ordinals, but the AutoFormat option is convenient. For most people, ordinals are one of the main reasons to use superscripts (the other being footnotes), so automatically converting them in this way is a true convenience.

## ***Replace fractions (1/2) with fraction characters (½)***

The standard Windows character set, which most fonts adhere to, includes three fraction characters: ½, ¼, and ¾. When you enable this option, Word automatically converts 1/2, 1/4, and 3/4 to their fraction equivalents.

Too bad the Windows character set doesn't include a few other fractions — at least 1/3 and 2/3. Sigh.

## ***Two hyphens (--) with a dash (—)***

This option does two things:

- ◆ Replace two hyphens with a typographical dash, or *em dash*, named because it's about as wide as a capital letter *M*. For example, the — character is an em dash.
- ◆ Replaces two hyphens preceded and followed by a space with an *en dash*, named because it's about the width of a capital letter *N*, such as in June – July or Aug – Sep.

## ***\*Bold\* and \_italic\_ with real formatting***

This option applies bold formatting whenever you precede and follow a word or phrase with asterisks, and it applies italic formatting whenever you precede and follow a phrase with underscores. This option is turned off by default because few people use this archaic typing convention to indicate that they mean bold or italics.

## ***Internet and network paths with hyperlinks***

This option watches for text that looks like an Internet address, such as `www.wiley.com` or `Gomez@Addams.com`, or network paths, such as `\\SERVER01\ADMIN`. It then formats these items as hyperlinks so that you can Ctrl+click them in Word to open the Web page or network location they point to in a browser window.



## *Apply as you type*

The Apply As You Type section of the AutoFormat As You Type tab lets you select various formatting options that apply to text as you type. The following sections describe each of these options.

### *Automatic bulleted lists*

If you start a paragraph with a character that resembles a bullet, such as an asterisk (\*), a hyphen (-), the letter o, or the > symbol, followed by a space or tab, Word removes the bullet character and the space or tab and instead formats the paragraph as a bullet list. Automatic bullets are convenient for users who haven't yet learned how to use the Bullets button in the Paragraph group on the Home tab on the Ribbon.

### *Automatic numbered lists*

If you start a paragraph with a number followed by a period, space, tab, or parenthesis, Word removes the number and instead formats the paragraph as a numbered list. This option works for users who haven't yet learned how to use the Numbering button in the Paragraph group on the Home tab on the Ribbon, but it drives me batty. Usually, if I start a paragraph with a number followed by a tab, I'm creating a numbered list in a format that is too complicated for the Numbering button to handle, and I don't want to take the time to mess with Word's multilevel numbered list feature. For simple numbered lists, I just click the Numbering button anyway.

### *Border lines*

If you type three or more hyphens, underscores, or equal signs in a row and press Enter with the Border Lines option selected, Word deletes the characters and instead applies a border to the bottom of the paragraph: a thin line for dashes, a thick line for underscores, or a double line for equal signs. This feature is neat.

### *Tables*

This feature is the strangest of all the AutoFormat As You Type features. It automatically creates a table whenever you type a plus sign followed by one or more hyphens, another plus sign, and (optional) another set of hyphens and plus signs. For example, to create a table with four columns, you could type this line:

+—+—+—+—+

The number of hyphens you type between the plus signs determines the width of each column.

If you ask me, using the Table button in the Tables group on the Insert tab is easier. You can look to Book IV, Chapter 4 for all the delights about tables.

### ***Built-in heading styles***

Whenever you type a line that starts with a capital letter, has no ending punctuation, and is at least 20 percent shorter than the maximum line length, Word makes the paragraph a heading if you select this option. Frankly, the rules for AutoFormatting headings as you type are too restrictive. What if the heading needs to be more than one line long? (Some do.) What if the heading ends with a question mark? What if you need to use two or more levels of headings? Memorizing the keyboard shortcuts for applying the built-in Word heading styles is much easier: Ctrl+Alt+1 for a Heading 1 or Ctrl+Alt+2 for a Heading 2, for example.

### ***Automatically as you type***

Another group of AutoFormat As You Type options applies the formatting described in the following sections.

#### ***Format beginning of list item like the one before it***

This feature attempts to apply consistent formatting to the first portion of every item in a list. For example, if the first list item begins with boldface text and switches to normal after a colon, Word automatically applies that formatting to subsequent list items.

#### ***Set left and first indents with tabs and backspaces***

When you select this feature, pressing the Tab key sets the indentation for paragraphs. For example, if you press Tab at the beginning of a new paragraph, Word automatically increases the paragraph indentation by half an inch. Press Backspace to decrease the indentation by half an inch. If you press Tab when the insertion point is at the beginning of an existing paragraph, Word increases the first line indent by half an inch.

Personally, I'd rather use styles to set indentation so that it's consistent throughout the document. See Chapter 3 of this minibook for more on styles.

#### ***Define styles based on your formatting***

This option automatically creates styles based on AutoFormat formatting. Normally, this option is turned off, and I recommend that you leave it off. Using styles is the best way to apply formatting consistently throughout a document, but you have much more control if you create and apply styles yourself rather than let Word automatically create them. Chapter 3 of this minibook tells you much more about styles.

## Using AutoText

The AutoText feature lets you store words or phrases or longer portions of text and graphics under a user-defined name. Then, to recall stored text, you simply type the AutoText name and press F3, the AutoText key. For example, you might store your address in an AutoText entry named *addr*. To include your address in a document, you just type **addr** and press F3.

An AutoText entry can contain more than text: It can contain complete formatting information as well as graphics. In essence, an AutoText entry can contain any part of a Word document that you can select.



Another way to insert AutoText entries is to use the Quick Parts button on the Insert tab of the Ribbon. Click Quick Parts and then click AutoText and select the AutoText item you want to insert from the gallery that appears.

### Creating an AutoText entry

To create an AutoText entry, follow these simple steps:

1. **Type and format the text exactly as you want to store it.**
2. **Select the text.**
3. **On the Insert tab, click the Quick Parts button and then click AutoText and then click Save Selection to AutoText Gallery.**

The Create New Building Block dialog box, shown in Figure 5-4, opens.

4. **Type a name for the AutoText entry.**

Word suggests the text itself as the AutoText name, but you should change it to a more succinct name. For example, I typed *ta* for the name shown in Figure 5-4.

**Figure 5-4:**  
Creating an  
AutoText  
entry.

**5. Set the Options control to indicate how to insert the text.**

The three options are self-explanatory:

- Insert content only
- Insert content in its own paragraph
- Insert content in its own page

**6. Click OK to create the AutoText entry.*****Editing an AutoText entry***

You cannot directly edit an AutoText entry. You have to follow a roundabout procedure, such as this one:

- 1. Switch to a new document.**
- 2. Insert the AutoText entry by typing its name and pressing F3.**
- 3. Edit the entry however you want.**
- 4. Select the entire entry.**
- 5. Use the procedure described in the previous section to re-create the AutoText entry using the same name.**

## Comparing AutoCorrect and AutoText

The Word AutoCorrect and AutoText features are similar enough that you can easily become confused about which is which, and which

feature you use in a given situation. The following table should help clarify the difference between AutoCorrect and AutoText.

<b><i>AutoCorrect</i></b>	<b><i>AutoText</i></b>
Associates a name with stored text, formatting, and graphics	Associates a name with stored text, formatting, and graphics.
Automatically recalls entries when you type the entry name followed by a space or punctuation	Manually recalls entries when you type the entry name and press the AutoText key (F3)
Intended for correcting simple spelling errors or typing special symbols	Intended for storing commonly used text for quick recall
Stores AutoCorrect entries (always available) with Word options	Stores entries in templates; entries available only when the template is open
Provides other typing-related features, such as smart quotes and capitalization correction	Simply AutoText

# Chapter 6: Spell-Checking and the Thesaurus

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## *In This Chapter*

- ✓ Spell-checking your document with the spell checker
- ✓ Correcting your grammar with the grammar checker
- ✓ Using the thesaurus
- ✓ Employing the dictionary

**T**his chapter shows you how to tap into several Word features designed to help you improve your writing. The spell checker automatically detects and offers to correct spelling mistakes. The grammar checker can help you avoid embarrassing gaffes such as using *it's* rather than *its* or *your* rather than *you're*. The thesaurus can help you find just the right word — the correct, true, accurate, and precise word. And the Word Research feature can help you look up words or topics in online dictionaries and encyclopedias.

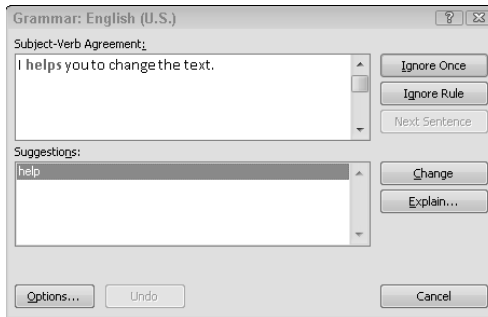
## *Using the Spelling and Grammar Checker*

I was voted Worst Speler in the sixth grade. Not that being Worst Speler qualifies me to run for president or anything, but it shows how much I appreciate computer spell checkers. Spelling makes no sense to me. Many years ago, I saw on public television the program *The Story of English*. It made me feel better. Now at least I know whom to blame for all the peculiarities of English spelling: the Anglos, the Norms (including the guy from *Cheers*), and the Saxophones.

Fortunately, Word has a decent spell checker. In fact, the spell checker in Word is so smart that it knows that you made a spelling mistake almost before you make it. The spell checker watches over your shoulder as you type and helps you correct your spelling errors as you work.

By default, Word also checks for grammatical errors as you type. When it spots what it thinks is an error, it underlines the suspected text with a wavy green underline. You can right-click the underlined text to display a menu of suggested changes. If you choose Grammar from the menu that appears when you right-click the underlined text, the Grammar dialog box appears (see Figure 6-1).

**Figure 6-1:**  
The  
Grammar  
dialog box.



You can use the spelling and grammar checker in two basic ways:

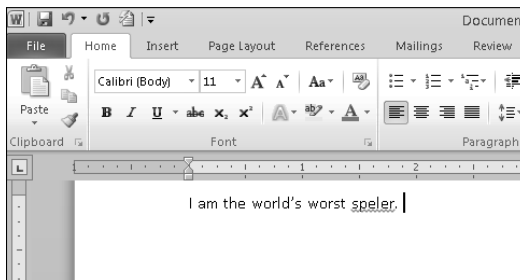
- ◆ Let it do its work, as you type your document, of pointing out and correcting mistakes as you make them.
- ◆ Wait until you finish typing your document and then check it for spelling mistakes all at one time.

You can use whichever of these two techniques best fits your style. If you're an especially bad speller and "grammerer," you might want to use both features for good measure.

### *Checking spelling as you go*

Word's on-the-fly spell checker watches over your shoulder as you type, politely pointing out spelling mistakes as you make them. The spell checker looks up in its dictionary every word you type, to ensure that you spelled it right. If you type something it can't find in its dictionary, the spell checker underlines the mistake with a wavy red line, as shown in Figure 6-2.

**Figure 6-2:**  
The wavy  
red line.  
(Truly, it's  
red.)



I tried to persuade the good people at John Wiley & Sons to spring for an expensive four-color printing process for this book so that you could see the red line shown in the figure. They informed me that they would be happy to

oblige and that the added cost would be deducted from my royalty check. That's when I realized that you could probably just pretend that the wavy black line shown in the figure is a wavy red line.



Word doesn't beep, chime, or yell at you when you misspell a word. As a result, unless you watch the screen as you type, you might not immediately notice a spelling error. Periodically checking the screen is a good idea, even if you're a 90-word-per-minute touch typist who never looks up.

In Figure 6-2, the word *Speler* is marked as misspelled. When you see the tell-tale wavy red line (trust me, it's red), you have these options:

- ◆ **Make the correction:** You can press Backspace to delete the word and then retype it with the correct spelling. After you do that, Word removes the wavy red underline.
- ◆ **Let Word help:** You can right-click the word to open a menu that lists suggested spellings for the word. In most cases, Word makes guesses about what you meant to type and suggests correctly spelled words. For example, when you right-click *Speller*, these suggestions appear:

Speller  
Spell or  
Spiller  
Spellers

To replace the misspelled word with the correct spelling, just choose the correctly spelled word from the menu.

The quick menu that appears when you right-click a misspelled word also shows these commands:

- ◆ **Ignore:** Sometimes, you want to misspell a word on purpose. For example, you might be writing a chapter about how to use the spell checker and you want to spell the word *Speller* on purpose. In that case, you want to just ignore the misspelling. To do that, right-click the word and choose Ignore All. Then the spell checker ignores the word throughout the document.
- ◆ **Ignore All:** Like Ignore, but ignores all occurrences of the same misspelling, not just this one.
- ◆ **Add to Dictionary:** In some cases, the underlined word is spelled correctly, after all; it just happens that the Word dictionary doesn't recognize it. Right-click the word and choose Add to Dictionary to add the word to the Word spelling dictionary. That way, Word won't flag the word as misspelled in the future.

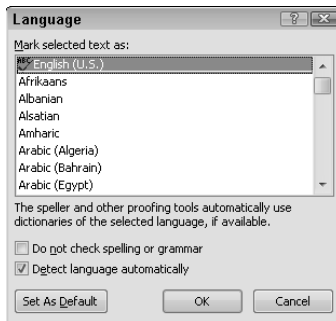
- ◆ **AutoCorrect:** This command reveals a menu that lists the correct spelling suggestions for the misspelled word. When you select a suggestion, Word creates an AutoCorrect entry that automatically corrects this spelling error from now on. Choose this option only for words you frequently misspell that aren't already in the AutoCorrect list.



If you accidentally use this feature and then you want to remove the AutoCorrect entry it creates, don't rely on the Undo command. The Undo command undoes the correction, but it doesn't remove the AutoCorrect entry. To remove the AutoCorrect entry, choose File→Options and click the Proofing tab. Then click the AutoCorrect Options button, select the entry you want to remove from the list, and click Delete. Another way to reach the AutoCorrect Options dialog box is to right-click the wavy red line, select AutoCorrect, and then select AutoCorrect Options from the drop-down list.

- ◆ **Language:** This command lets you open the Language dialog box, shown in Figure 6-3. You use this dialog box to specify the language dictionary that Word uses to check your spelling. You can also use it to suspend spell-checking for the entire paragraph.

**Figure 6-3:**  
The  
Language  
dialog box.



The spell checker can't tell you when you use the wrong word if you spell it correctly. For example, you might type *dime navels* when you mean *dime novels*. Cheap literature may be a bad thing, but cheap citrus certainly is not.

## *Checking for grammatical errors*

By default, Word checks for grammatical errors as you type. When it spots what it thinks is an error, it underlines the suspected text with a wavy green underline. You can right-click the underlined text to display a menu of suggested changes. If you choose Grammar from the menu, the Grammar dialog box appears (refer to Figure 6-1).



You can ignore your mistake or ask the Grammar dialog box to help you understand the errors of your ways by clicking the Explain button. This action opens the Word Help dialog box, which attempts to instruct you to a better grammar way. You can also access this option when you right-click the underlined text by choosing About This Sentence.

## *Spell and grammar checking after the fact*

If you prefer to ignore the constant nagging by Word about your spelling, you can always check your spelling and grammar the old-fashioned way: Run the spell checker after you finish your document. The spell checker works its way through your entire document, looking up every word in its massive list of correctly spelled words and calling to your attention any misspelled words. It performs this task without giggling or snickering. As a bonus, the spell checker even gives you the opportunity to tell it that you're right and it's wrong and that it should discern how to spell words the way you do.

These steps show you how to check the spelling for an entire document:

- 1. If the document you want to check isn't already open, open it.**
- 2. Fire up the spelling and grammar checker.**

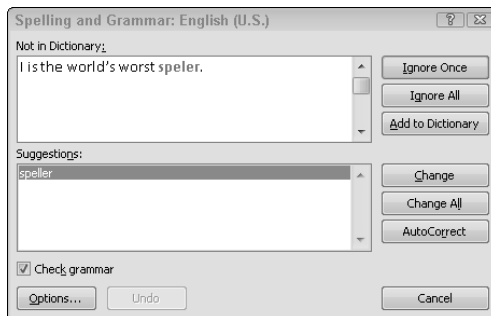
Click the Spelling & Grammar button in the Proofing group on the Review tab on the Ribbon, or press F7.

- 3. Don't be startled if Word finds a spelling or grammatical error, or both.**

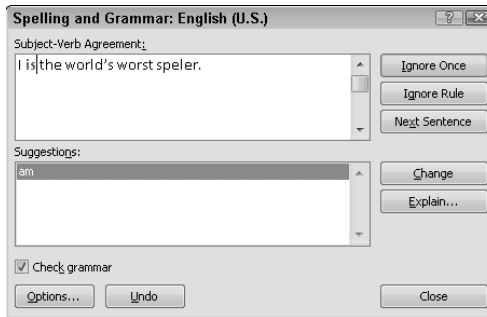
If Word finds a spelling error, it displays the misspelled word along with a suggested correction, as shown in Figure 6-4.

If Word finds a grammatical error, it displays the error word (or words) along with a suggested correction, as shown in Figure 6-5.

**Figure 6-4:**  
The Spelling  
and  
Grammar  
dialog box,  
on spelling.



**Figure 6-5:**  
The Spelling  
and  
Grammar  
dialog box,  
on grammar.



#### 4. Select the correct spelling or laugh in Word's face.

If you agree that the word is misspelled (or your grammar is off), skim the list of corrections that Word offers and select the one you like. Then click the Change button. Other options at your disposal include

- *Ignore Once*: Choose this option to tell the Spelling and Grammar checker to ignore the alleged error. You click this button nine times out of ten (with the possible exception of Cancel).
- *Ignore Rule*: The grammar checker ignores the rule that caused it to flag the text. After Word incorrectly accuses you of using sentence fragments 10 or 12 times in a row, you might want to click this button to make it stop.
- *Next Sentence*: Many times, the grammar checker reports multiple errors for a single sentence. You can often tell when the grammar checker is making neither heads nor tails out of a sentence. For example, the grammar checker usually has trouble with headings and captions and other bits of text that aren't complete sentences. Rather than wade through message after message for these non-sentences, you can click Next Sentence to direct the grammar checker to skip ahead to the next sentence.
- *Change*: Click this button to edit the word or sentence directly in the Grammar dialog box and then record your change in the document.
- *Explain*: The grammar checker displays a description of the rule that caused the sentence to be flagged as a possible error. Some explanations are brief; others are elaborate grammar lessons.
- *Options*: Opens the Word Options dialog box so that you can change the behavior of the grammar checker or spelling options.
- *Undo*: Undoes the last grammar checker action.
- *Cancel*: This button is my favorite one in the Grammar dialog box.

#### 5. Repeat Step 4 until Word gives up.

**6. Click OK when you see this message:**

The spelling and grammar check is complete.

You're finished.

If Word detects a repeated word (that is, the same word twice in a row), it displays a variation of the Spelling and Grammar dialog box that gives you two choices: Ignore Once or Delete. To repeat the word, click Ignore. To delete the second occurrence of the repeated word, click Delete.



If Word can't come up with a suggestion or if none of its suggestions is correct, you can type your own correction directly in the box showing the text with the error and click the Change button. If the word that you type isn't in the dictionary, Word asks whether you're sure you know what you're doing. Double-check and click Yes if you mean it.

If you grow tired of Word's running complaint about a word that isn't in its standard dictionary, click Add to Dictionary to add the word to the custom dictionary. If you can't sleep at night until you know more about the custom dictionary, see the earlier section "Checking spelling as you go."



The speller can't tell the difference between pairs of words: *your* and *you're*, *ours* and *hours*, and *angel* and *angle*, for example. In other words, if the word is in the dictionary, Word passes it by regardless of whether you used the word correctly. The Word spell checker, therefore, is no substitute for good, old-fashioned proofreading. Print your document, sit down with a cup of tea (or bourbon), and *read* it.

If you're interested only in checking the spelling of your document after opening the Spelling and Grammar dialog box, select the Spelling & Grammar button in the Proofing group on the Review tab on the Ribbon, or press F7. Then deselect the Check Grammar check box in the lower-left corner of the dialog box.

## Using the Thesaurus

One nifty Word feature is a built-in thesaurus that can quickly show you synonyms for a word you type. Using it is easy:

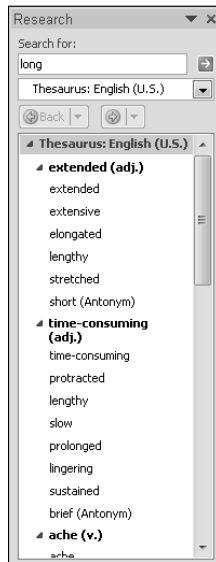
- 1. Right-click a word you typed and choose Synonyms from the menu that appears.**

A menu that lists synonyms for the word appears. (Sometimes, Word throws an antonym into the list, just to be contrary.)

- 2. Click the word that you want to replace your word.**

Word replaces the original word with your selection.

If you choose Thesaurus from the Synonyms menu, the Thesaurus section of the Research task pane appears with synonyms listed, as shown in Figure 6-6. You can also summon this task pane by clicking the Thesaurus button in the Proofing group on the Review tab on the Ribbon or by pressing Shift+F7. Use the Thesaurus task pane to look up words to find even more synonyms.



**Figure 6-6:**  
The  
Thesaurus  
task pane.

For example, if you type **sometimes** in the Search For text box and click the Start Searching button (the arrow pointing to the right in the green square) or press Enter, the results of your search are displayed in the window below. One replacement option is *on occasion*. If you then select that phrase, a whole new list of words is presented. You can keep clicking words to find other synonyms as long as you like, until you're ready to get back to real work. Use the Back button above the results window to navigate back to an earlier results pane. After you go back, the Forward arrow becomes available. Use the drop-down lists attached to either button to quickly navigate to a specific results list.

As you hover the mouse over the results list of synonyms, a drop-down button appears to the right of the word and lets you insert the word into your document, copy it to the Clipboard, or look up its definition. If you want to show results from, say, a French thesaurus, use the drop-down list under the Search For text box to specify which resources are used for your search.



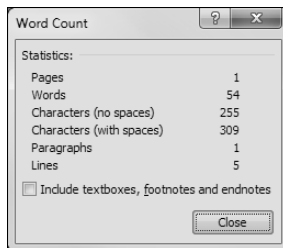
Use the Research Options link at the bottom of the Research task pane to open the Research Options dialog box. You can then add or remove reference books and online resources by selecting or deselecting their check boxes.

## Using Other Proofing Tools

In addition to the Spelling & Grammar button and the Thesaurus button, the Proofing and Language groups on the Review tab on the Ribbon contain more buttons to assist you:

- ◆ **Research:** Opens the Research task pane with the Bing search option initially selected. Simply enter your criteria in the Search For text box. Alternatively, you can highlight the text you're working on before you click the Research button.
- ◆ **Translate:** Translates your text into a different language. Choose from these three options: Translate Document, Translate Selected Text, and Mini Translator, which translates just a single word or phrase. You can also choose the Choose Translation Language option to specify the language you want to translate to.
- ◆ **Language:** Reveals a menu with two choices. The first, Set Proofing Language, lets you change the language used to check the spelling and grammar of a particular portion of text. The second, Language Preferences, lets you change the language used by Word's user interface.
- ◆ **Word Count:** Open the Word Count dialog box to display “vital statistics” about a document. To find out how many words are in a particular paragraph or sentence of your document, for example, select the text you want to count and click this button. Figure 6-7 shows the vital statistics for this paragraph.

**Figure 6-7:**  
Word Count  
in action.



The status bar displays the total number of words in your document at all times. If you're solely interested in the number of words in a selection of text and not all the various information that's shown when using the Word Count button, select the text and glance at the status bar, which tells you how many words in the entire document you have selected.

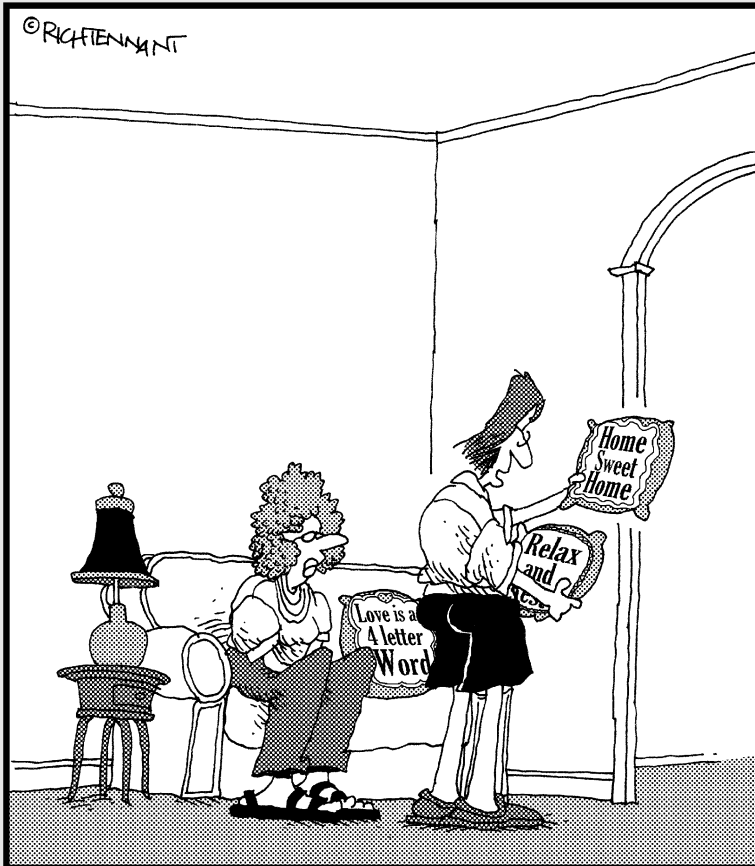


# Book III

## All about Formatting

The 5<sup>th</sup> Wave

By Rich Tennant



“Needlepoint my foot! These are Word fonts.  
What I can’t figure out is how you got the  
pillow cases into your printer.”

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# Chapter 1: Basic Page Formatting and Sections

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## *In This Chapter*

- ✓ Setting margins and page size and other basic page formats
- ✓ Adding page numbers to document pages
- ✓ Creating headers and footers
- ✓ Understanding the relationship between sections and page layout
- ✓ Creating section breaks

**A**lthough character and paragraph formatting determine how text looks, page formatting provides the container to hold all your beautiful content. Tall pages, wide pages, pages with wide margins to make four pages of text meet your teacher's five-page requirement — you can set up all these options with page formatting.

Word doesn't restrict you to using only one page format in a document. You can have as many different page formats as you want as long as you keep each one in its own section. Each section can have its own page number and text that appears at the top of each page (a *header*) or the bottom (a *footer*). Sections can even have different margins or different paper sizes.

Of course, you don't have to have more than one section in a document; in fact, most often a document is just one big, happy section all by itself. But that's okay, and the information in this chapter applies to one section just as well as to many, including such important tasks as setting up page margins, flipping pages from portrait to landscape orientation, and creating headers or footers at the top or bottom of every page.

## *Formatting the Page*

The Page Layout tab on the Ribbon provides controls for the various page layout formats. The Page Layout tab has five groups, but only one of them has much to do with the way you arrange the available space on a page. It's the Page Setup group on the Page Layout tab that's most useful when you want to arrange the way text fits on a page.

I also talk about the Page Background group in this chapter because it fits well with the rest of the material. But the Paragraph group is covered in Book II, Chapter 2; themes are in Book II, Chapter 3; and the Arrange group is in Book IV.

## Setting margins

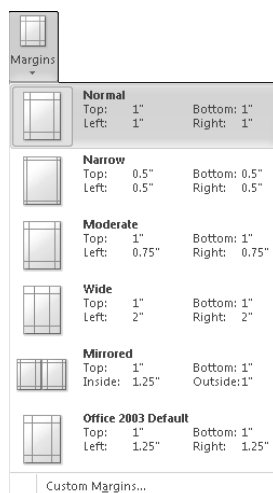
The margins of your document determine the part of the pages that Word uses to position your text. For example, when you start typing on a page, the text starts at the top margin, and when you center text, it's centered between the left and right margins.



You can control whether the top and bottom margins are displayed in Print Layout view by double-clicking the lines that mark the top and bottom page boundaries. You can also change this setting by using the Show White Space between Pages in Print Layout View option on the Display tab of the Word Options dialog box. (For more on views, turn to Chapter 2 of Book I.)

## Selecting a preset page margin

To change the margins of your page, select the Page Layout tab on the Ribbon and then click the Margins button to display the gallery shown in Figure 1-1.



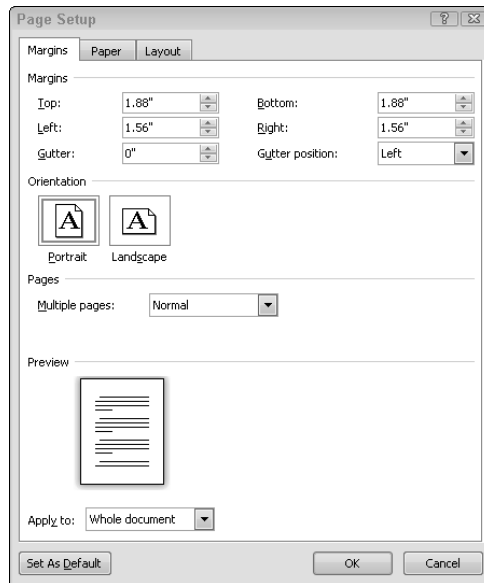
**Figure 1-1:**  
The gallery  
of page  
margin  
choices.

The choices in the gallery include the new standard settings for Word 2010 (1 inch on each of the four sides) as well as the old Word 2003 standard (1.25 inches on the left and right sides). Select a preset page margin to quickly specify the top, bottom, left, and right margins of your page. Here are some more options on the list:

- ◆ **Narrow:** Lets you squeeze more text on your page but makes the margins quite small (only half an inch).
- ◆ **Moderate:** Helps you squeeze just a little more text on your pages.
- ◆ **Wide:** Leaves hardly any room for text.
- ◆ **Mirrored:** Makes your left and right pages behave differently and then sets the inner margin to be slightly wider than the outer margin (which is useful if you're printing double-sided and planning to staple your pages together along the inner edge).

### Using Page Setup to control margins

If the choices in the gallery aren't enough for you, you can display the Margins tab of the Page Setup dialog box by selecting Custom Margins from the bottom of the gallery. Figure 1-2 shows the Margins tab of the Page Setup dialog box.



**Figure 1-2:**  
The Margins  
tab of the  
Page Setup  
dialog box.

Normally, this dialog box contains these options for setting margins:

- ◆ **Top:** Sets the distance from the top of the page to the first line of text. The default is 1".
- ◆ **Bottom:** Sets the distance from the bottom of the page to the last line of text. The default is 1".

- ◆ **Left:** Sets the distance from the left edge of the page to the start of the text. The default is 1".
- ◆ **Right:** Sets the distance from the right edge of the page to the end of the text. The default is 1".
- ◆ **Gutter:** Sets an additional amount of margin space for pages that are to be bound. The space is added to the left or top margin, depending on the Gutter Position setting, unless you select Mirror Margins, 2 Pages Per Sheet, or Book Fold for the Multiple Pages option.

When working with the gallery from the Ribbon, the margins you set are applied to the current section (which is usually the same as your entire document). You can apply the settings to the entire document by pressing Ctrl+A to select the document and then selecting from the gallery. The Page Setup dialog box gives you more precise control of the Apply To drop-down list. You use this control to decide whether to apply the settings

- ◆ To the **Whole Document**
- ◆ From **This Point Forward** (which inserts a section break)
- ◆ To **This Section** (the current section)
- ◆ To **Selected Sections** (multiple sections if you've selected across a section break)

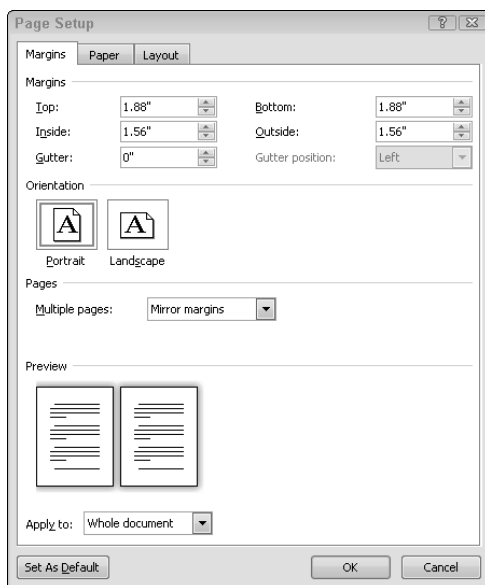
For more on sections, see "Understanding Sections," later in this chapter.

The Multiple Pages drop-down list lets you control how pages are laid out on the sheets of paper that the printer spits out. The options are

- ◆ **Normal:** You see one page per sheet.
- ◆ **Mirror Margins:** The left and right margins switch places every other page.
- ◆ **2 Pages Per Sheet:** You see two pages per sheet.
- ◆ **Book Fold:** You can print booklets. For more information, see the following sidebar, "Printing booklets."

If you select the Mirror Margins option from the Multiple Pages drop-down list, the Margins tab changes, as shown in Figure 1-3. The Left and Right options change to Inside and Outside, and the Gutter Position option becomes unavailable. This setting allows the margins on each page to alternate: On odd-numbered pages, the inside margin is on the left; on even-numbered pages, the inside margin is on the right. Any additional space provided for by the Gutter field is added to the inside margin.

**Figure 1-3:**  
The Margins  
tab with  
Mirror  
Margins  
selected.



## Setting orientation

The Orientation button on the Page Layout tab on the Ribbon displays a gallery with two choices:

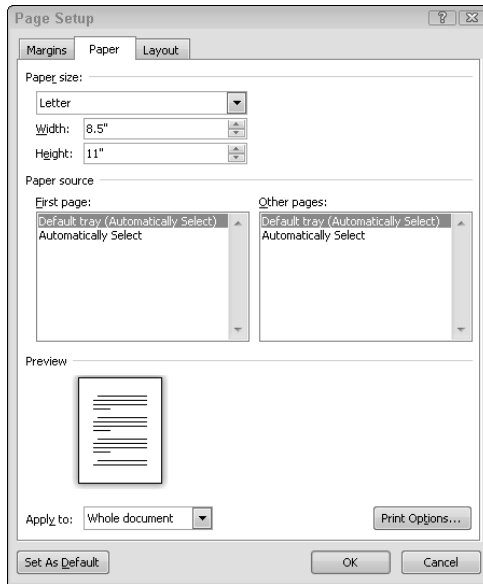
- ◆ **Portrait:** Orients the paper in an upright position, where the height is greater than the width.
- ◆ **Landscape:** Orients the paper sideways so that the width is greater than the height. When you switch from Portrait to Landscape (and vice versa), the Height and Width values are automatically swapped.

## Choosing a paper size

The Size gallery on the Page Layout tab on the Ribbon contains a list of available paper sizes for your computer and printer, which are probably more choices than you have paper in your house. Fortunately, the most commonly used size (Letter) is at the top, and the slightly longer Legal option is just an item away. Select the paper size you want to use for the current section and you're done with this gallery.

If you want greater control, select the More Paper Sizes option from the bottom of the gallery to display the Paper tab of the Page Setup dialog box, shown in Figure 1-4.

**Figure 1-4:**  
The Paper  
tab of the  
Page Setup  
dialog box.



The Paper tab includes these options for setting the paper size:

- ◆ **Paper Size:** Sets the paper size. You can pick from a variety of sizes in the drop-down list, including Letter and Legal and other envelope sizes.
- ◆ **Width:** Sets the width of the paper. This field is automatically set when you choose a paper size. If you change the value of this field, the name of the Paper Size field changes to Custom Size.
- ◆ **Height:** Sets the height of the paper. This field is also set automatically according to the paper size you select, and changing the height automatically changes the Paper Size field to Custom Size.

The Paper tab also has the following controls for telling your printer which paper to use for the pages in your document (controls that are quite useful if your document is supposed to use letterhead only on the first page):

- ◆ **Paper Source — First Page:** Specifies which paper tray the printer uses for the first page of your document
- ◆ **Paper Source — Other Pages:** Specifies which paper tray the printer uses for the second and subsequent pages of your document

## Printing booklets

The Book Fold option in the Multiple Pages drop-down list on the Margins tab of the Page Setup dialog box (wow, that's a mouthful) lets you create booklets from pages you fold in half and staple in the middle. If you've ever assembled that type of booklet, you know that you can't just print the pages in order. Instead, the first sheet of paper must have the first and last page on one side, and the second and next-to-last page on the other. Each additional sheet must have pages that alternate from the front of the booklet to the back. The only sheet that has two consecutive pages side by side is the sheet in the middle.

If you select the Book Fold option, Word automatically shuffles the pages correctly when you print your document so that they come out ready to be folded in half and stapled together. This option is an enormous timesaver if you want to create religious tracts or company songbooks or any other kind of booklet.

If you have no fancy printer that can automatically print on both sides of the page, choose the Manually Print on Both Sides option on the Print page in Backstage view when you print your booklet. Word prints the front side of each page of the booklet and then tells you to take out the pages and reinsert them into the printer's paper tray to print the backsides.

As with the other tabs in the Page Setup dialog box, you can use the Apply To control to specify which parts of your document are formatted with the new settings. For more on sections, see "Understanding Sections," later in this chapter.



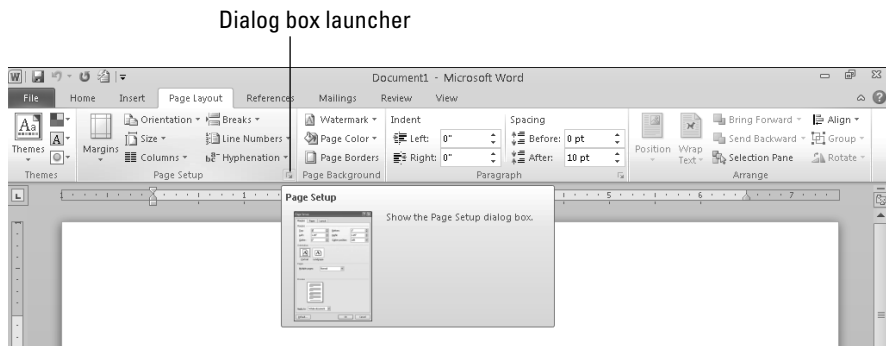
In most cases, you use the same paper source for all pages (both First Page and Other Pages). However, using a different paper source for the first page of business letters is common.

The Paper tab also has a Print Options button that opens a dialog box filled with options to control how Word displays text and works with your printer.

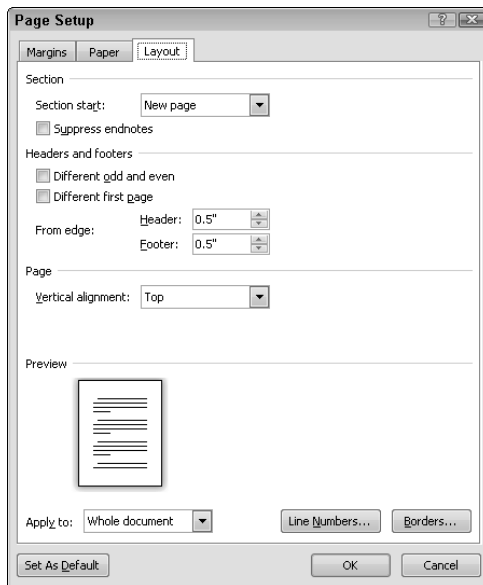
## Choosing layout options

The third tab of the Page Setup dialog box is named Layout, which sounds more exciting than it is. (You can open this dialog box by clicking the dialog box launcher, a little square control, in the lower-right corner of the Page Setup group, as shown in Figure 1-5.) The word *layout* conjures up hopes of an all-encompassing dialog box in which you can control at least the major aspects of your document's layout. Alas, the lowly Layout tab should have been named Leftovers because it contains nothing but a few obscure layout options that apparently didn't seem to fit anywhere else. The Layout tab is shown in Figure 1-6.

**Figure 1-5:**  
The magic  
spot for  
launching  
the Page  
Setup dialog  
box.



**Figure 1-6:**  
The Layout  
tab of the  
Page Setup  
dialog box.



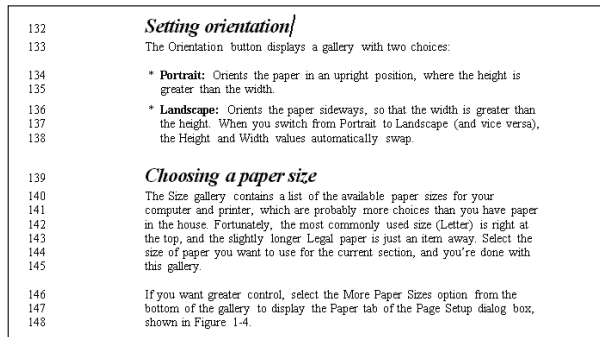
## *Counting the lines in your document*

The Line Numbers control must be the most important command on the Layout tab because it has its own gallery control on the Page Layout tab on the Ribbon. *Line numbers* appear in the margin of your document to count the lines. Figure 1-7 shows an example of a document with line numbers.

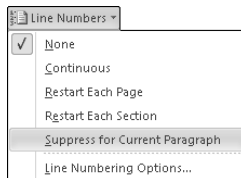
The Line Numbers gallery, shown in Figure 1-8, lets you turn line numbering on or off for the current section and also control when the numbering restarts. (*Continuous* on the menu means that the numbering never restarts until you move to another document.) This gallery is perhaps most useful because it includes the *Suppress for Current Paragraph* command, which lets you skip the current paragraph in the count.



**Figure 1-7:**  
A document  
with line  
numbers.

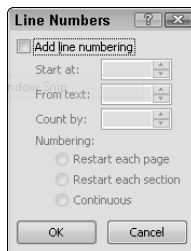


**Figure 1-8:**  
The Line  
Numbers  
gallery.



The Line Numbering Options command opens the Layout tab of the Page Setup dialog box, where you have to click the Line Numbers button to open the Line Numbers dialog box, shown in Figure 1-9. This dialog box gives you more control over the formatting of line numbers. (Microsoft wanted to give you a little more exercise rather than open the dialog box for you.)

**Figure 1-9:**  
The Line  
Numbers  
dialog box.



The most useful part of this dialog box is the setting to control which increment of lines is printed. (The values most commonly used are 5 and 10.) Each line is still counted, but the numbers between the increment values are hidden. You can also set a starting value for the line numbers as well as the same options that are in the gallery — whether line numbering restarts for each page or section or is continuous for the entire document.

### ***Formatting sections***

The only other command on the Layout tab of the Page Setup dialog box that relates to a button on the Ribbon is the one for controlling how sections start. The Breaks button on the Ribbon includes several different types of separators that you can insert into your text, including the standard page break (Ctrl+Enter), a column break, and the various forms of the section break. You can use the Breaks gallery to insert section breaks, but you need to use the Section Starts drop-down list on the Layout tab of the Page Setup dialog box to change a section after it's inserted.

Use the following commands (found on the Layout tab of the Page Setup dialog box; refer to Figure 1-5) to control section breaks and format a page in general:

- ◆ **Section Start:** This drop-down list offers essentially the same options that are available from the Breaks gallery in the Page Setup group on the Page Layout tab. Section Start lets you change the section break type for the current section. For example, if you create the section and originally specify Odd Page but now you want to change it to New Page, you make the change with this option. (For more about different types of section breaks, see “Creating section breaks,” later in this chapter.)
- ◆ **Vertical Alignment:** Top is the default setting. (Center, Justified, and Bottom are the others.) Use Center if you want to center a title in the middle of the page and don't want to press Enter a dozen times to center it. (I've never found a use for Justified or Bottom.)
- ◆ **Borders:** Open the Page Border tab of the Borders and Shading dialog box, where you can add a border to every page of the document.
- ◆ **Different Odd and Even** and **Different First Page:** These two options let you set up different headers and footers for even and odd pages or for the first page in a section. This option is useful if you're printing on both sides of the page or if you don't want the header to appear on the first page. Read the section “Working with Headers and Footers,” later in this chapter, for more on headers and footers.
- ◆ **Header:** Specify the distance from the top of the page to the header area. The default is 0.5”.
- ◆ **Footer:** Specify the distance from the bottom of the page to the footer area. The default is 0.5”.

## ***Hyphenating Your Text***

Word can automatically hyphenate words rather than break lines between words. Hyphenating words results in less empty space on each line, which is important when using justified alignment or working with columns. You can set up hyphenation so that Word hyphenates your words as you type

them, or you can wait until after you type your text and then let Word automatically hyphenate the document. Hyphenating as you type can slow down Word, especially if you don't have a blazingly fast computer. I suggest that you type your document first and then hyphenate it. Here's how:

**1. Type your text.**

Don't worry about hyphens during this step.

**2. Select Automatic from the Hyphenation gallery, located in the Page Setup group on the Page Layout tab.**

Word hyphenates the document.

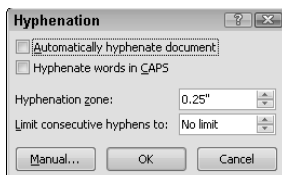
**3. Check the results.**

You might not be happy with the Word hyphenations. Always check the results and make any necessary corrections.

If you aren't happy with the way Word hyphenates your document, you can click the Hyphenation Options command to gain greater control over Word (or at least over the way it's hyphenating your document). Using the Hyphenation dialog box, shown in Figure 1-10, you can

- ◆ **Deselect the Hyphenate Words in CAPS check box if you don't want to hyphenate words made entirely of capital letters.** This option is useful if your writing includes specialized jargon that appears in all capital letters and shouldn't be hyphenated. For example, if you use terms such as TECHNOBABBLE VOCABULATOR that must not, under any circumstances, be hyphenated, you'll love this option.
- ◆ **Adjust the hyphenation zone if you're picky.** This zone is the area in which Word tries to end each line. If necessary, Word hyphenates words that cross into this zone. If you make this zone larger, Word hyphenates more words, but sometimes it results in lines that look too spaced out (for justified text) or right margins that are too ragged (for left-aligned text).
- ◆ **Set the Limit Consecutive Hyphens To list box to 3 or 4.** Having two hyphens in a row isn't wrong, and three is okay once in a while. But the default Word setting for this field places no limit on the number of consecutive lines that Word can hyphenate. You don't want to see a page of 20 hyphenated lines, do you?

**Figure 1-10:**  
The  
Hyphenation  
dialog box.



Here are some hyphenation pointers to keep in mind:



- ◆ Word uses its dictionary to determine where to hyphenate words. It probably spells better than you do. (I know it spells better than *I* do!)
- ◆ If you want to cause Word to hyphenate a word at a particular spot, place the cursor wherever you want the word hyphenated and press Ctrl+- (the hyphen). Pressing this shortcut creates an *optional hyphen*, which is displayed only when the word falls at the end of a line.
- ◆ Do *not* hyphenate a broken word at the end of a line simply by typing a hyphen. It might work for now, but if you later edit the text so that the hyphenated word no longer falls at the end of a line, the hyphen still appears, now in the middle of the line where it doesn't belong. Use Ctrl+- instead.
- ◆ Sometimes you want to insert a hyphen in a compound word but you don't want the word to be split at the end of the line, because it might look funny — for example, *G-Men* (a movie title). In that case, press Ctrl+Shift+-, rather than the hyphen key alone, to create the hyphen. Word displays the hyphen but doesn't break the word at the hyphen.



- ◆ If you click the Manual option in the Hyphenation gallery, Word leads you through the entire document, asking you about each word it wants to hyphenate, which is tiresome beyond belief. Just hyphenate the document and then review it and remove any hyphens you don't like.

## *Inserting Page Numbers*

Headers and footers, which I describe in detail in the next section, are useful for inserting information at the top or bottom of every page. The most common type of information in a header or footer is the page number. If the only information you want to appear in your header or footer is a page number, you don't even have to mess with headers and footers. Instead, just use the Page Numbers gallery from the Insert tab by following these steps:

### **1. Click the Page Number button on the Insert tab.**

The Page Number gallery appears. It lets you decide where you want the page numbers to be located.

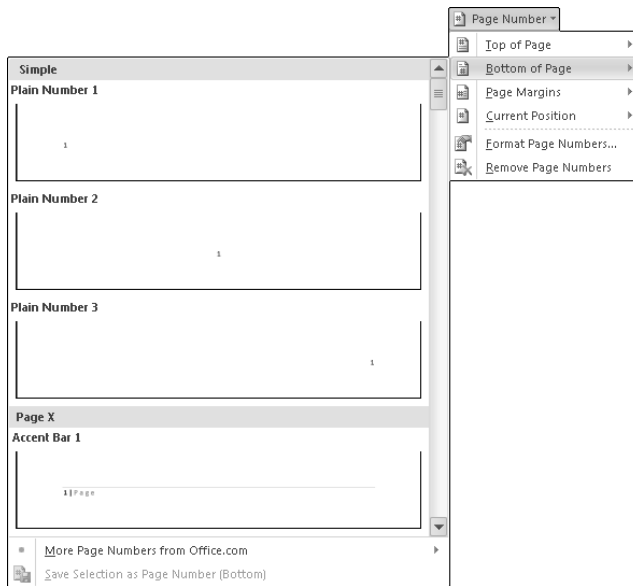
### **2. Set the page number position by selecting from the gallery.**

The choices are Top of Page, Bottom of Page, Page Margins, and Current Position. Each position displays a collection of preformatted page numbering. The display for the Bottom of Page option is shown in Figure 1-11.

### **3. Select the format you want to use for your page numbers.**

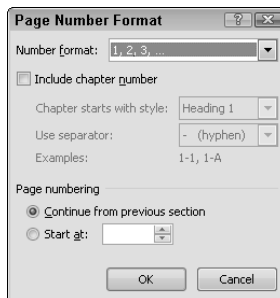
Word updates your document to show the selected page numbers.

**Figure 1-11:**  
The choices for numbering your pages at the bottom of the page.



For greater control, you can click the Format Page Numbers command at the bottom of the gallery. The Page Number Format dialog box appears, as shown in Figure 1-12.

**Figure 1-12:**  
The Page Number Format dialog box.



This dialog box lets you control several aspects of page numbering. For starters, you can change the page number format by selecting an option from the Number Format drop-down list. You can choose normal Arabic numbering (for example, 1, 2, 3), upper- or lowercase letters (A, B, C or a, b, c), or upper- or lowercase roman numbering (I, II, III or i, ii, iii).

You can select the Include Chapter Number option to create compound page numbers that include a number drawn from a heading paragraph, such as 1-1, 1-2, and so on. Follow these steps:

1. **Format the chapter headings by using one of the built-in Word heading styles.**

In most cases, you should use the Heading 1 style.

2. **Choose a list format that numbers the headings. (For more information about working with numbering, see Chapter 3 in this minibook.)**

3. **Click the Page Number button on the Insert tab.**

The Page Number gallery shows up.

4. **Select the Format Page Numbers command to summon the Page Number Format dialog box.**

5. **Select the Include Chapter Number check box and then indicate which style to use for the chapter titles and which character you want to use as a separator between the chapter number and the page number.**

You can use a hyphen, period, colon, or dash as the separator.

6. **Click OK to insert the page numbers into the document.**

The Page Number Format command also lets you set a starting page number for the document or section. Usually, you use Continue from Previous Section in the Page Numbering section of the Page Number Format dialog box so that page numbers are continuous throughout the document. However, if you created a separate section for front matter (such as a title page or table of contents, for example), restarting the page numbers at page 1 for the first chapter of the document is customary.

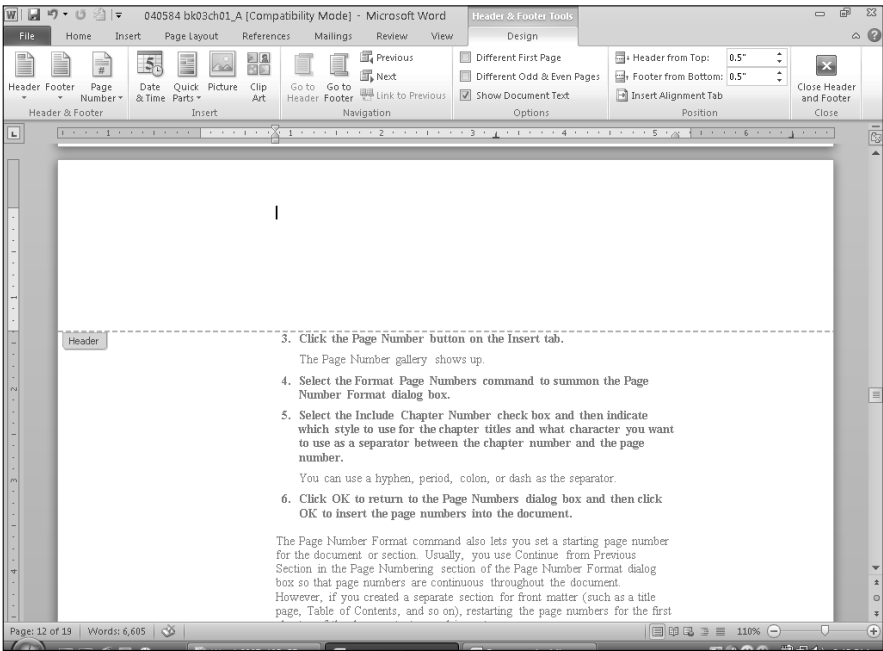
## *Working with Headers and Footers*

The Page Number command is useful if the only element you want to appear at the top or bottom of a page is a plain, unadorned page number. Fortunately, Word provides two other galleries in the Header & Footer group (on the Insert tab) to give you more options. To add a header to the top of your pages, select from the Header gallery. To add a footer to the bottom of your pages, select from the Footer gallery. When you add a header or footer, Word activates the Header and Footer area and displays, on the Ribbon, the Header & Footer Tools tabs with the Design tab active. The body of your document remains visible but is dimmed to indicate that you cannot edit it. See Figure 1-13.







You can activate the header or footer area by double-clicking over the header or footer. Be careful not to double-click between the pages in Print Layout view (see Chapter 2 of Book I for more on views), or else you hide the space between the pages rather than activate the header or footer area.

**Figure 1-13:** Document text dims while you work with a header or footer.


















The Design tab (on the Header & Footer Tools context tab) provides the same three galleries that are in the Header & Footer group of the Insert tab along with commands for creating your own headers and footers. Table 1-1 describes the function of the buttons on this Design tab.

Table 1-1 Header & Footer Tools Design Tab Buttons	
Button	What You Can Do with It
	Insert a variety of predefined headers.
	Insert a variety of predefined footers.
	Insert a variety of predefined page numbers, which can be in the header or footer.
	Insert a marker to be replaced by the current date or time or both.

(continued)

**Table 1-1 (continued)**

<b>Button</b>	<b>What You Can Do with It</b>
 Quick Parts *	Insert document properties or fields.
 Picture	Insert a picture.
 Clip Art	Insert ClipArt.
 Go to Header	Switch from the footer to the header area.
 Go to Footer	Switch from the header to the footer area.
 Previous	If the document has more than one section, move to the header of the previous section.
 Next	If the document has more than one section, move to the header of the following section.
 Link to Previous	Make a header or footer identical to the one in the preceding section.
 Different First Page	Insert a different header and footer on page 1. (You can also set this option on the Layout tab of the Page Setup dialog box.)
 Different Odd & Even Pages	Insert a different header and footer on even and odd pages. (You can also set this on the Layout tab of the Page Setup dialog box.)
 Show Document Text	Control whether the document text is dimmed or not even shown.
 Header from Top: 0.5" ▾	Set the position of the beginning of the header area. (You can also set this option on the Layout tab of the Page Setup dialog box.)
 Footer from Bottom: 0.5" ▾	Set the position of the end of the footer area. (You can also set this option on the Layout tab of the Page Setup dialog box.)
 Insert Alignment Tab	Insert a special tab character that aligns the text following it relative to the margins. Unlike tabs that rely on tab stops to determine position, these alignment tabs change position as the margin changes. This option is most useful for positioning elements at the right margin. If you change the margin using a traditional tab and tab stop, you also have to move the tab stop. But by using an alignment tab, the position is automatically updated.
 Close Header and Footer Close	Return the focus to the document so that the document text is shown normally and the header and footer are dimmed.





## Adding a button to show headers

If you create a lot of documents that have headers and footers, you might want a more convenient way to access them. Unfortunately, the standard Word setup doesn't have a Header and Footer button, though you can create one yourself easily enough. Just follow these steps:

1. **Choose File➔Options and click the Quick Access Toolbar entry.**

You see the Customize view of your options.

2. **In the Categories list, select All Commands.**

3. **Select the Edit Header command from the list on the left.**

It's listed in alphabetical order, so it's easy to find.

4. **Click the Add button.**

This step adds the button to the ones on your Quick Access toolbar. You can use the up and down arrows on the right side of the list to change the order in which the buttons appear.

5. **Click OK to dismiss the Word Options dialog box.**

The Edit Header is added to the Quick Access toolbar, making it quite easy to find.

You can type anything you want in the header or footer areas, and you can apply any type of formatting you want. By default, Word creates a centered tab stop set dead in the middle of the page and a right-aligned tab stop at the right margin. As a result, you can use the Tab key to create a header that has some text flush against the left margin, some more text centered on the page, and still more text flush against the right margin.



You can often spruce up the appearance of a page by adding a border line beneath the header or above the footer. Just use the Borders gallery on the Home tab.

## Understanding Sections

The section is the basis of Word's page layout formatting. Most documents consist of only a single section, so all pages in the document receive the same formatting. If some pages require different formatting, you can break the document into two or more sections, each with its own page format.

Sections control the following formatting information:

- ◆ The size of the paper
- ◆ The left, right, top, and bottom margins

- ◆ The orientation of the paper — that is, whether the document is printed in *portrait* mode (height is larger than width) or *landscape* mode (width is larger than height)
- ◆ The number and spacing of columns
- ◆ Header and footer information, including the positioning of the header or footer as well as its appearance
- ◆ Footnotes and endnotes, again including the positioning and appearance of the footnotes and endnotes
- ◆ Page numbering
- ◆ Line numbering

One of the most confusing aspects of working with sections is that a single page can contain more than one section. For example, a page might start off with a single-column layout, and then switch to two columns, and then switch back to a single column. Such a page has three sections.

Unfortunately, Word doesn't include one convenient command that allows you to set all these formats from one location. In fact, you don't even set most of the section formats from the same tab. Instead, section formatting is scattered about the Ribbon tabs:

- ◆ **The Page Layout tab:** The commands on this tab let you set basic page formatting information such as margins, the position of headers and footers, and paper size and orientation. It's also where you find the Breaks gallery, which lets you insert new sections. You can specify the number of columns and the size and spacing of each column. (For more information about columns, see Chapter 2 of this minibook.)
- ◆ **The Header & Footer group on the Insert tab:** These commands let you add a page number to your pages or add even more complex headers or footers. All settings relating to headers or footers can be set independently for each section.



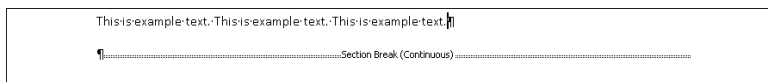
The Design tab (on the Header & Footer Tools context tab) also relates to sections and lets you vary the page numbering style and set the starting page number for the section.

- ◆ **The References tab:** These commands let you create footnotes or endnotes and control their appearance and position. (I cover this topic in Book VI, Chapter 2.)

All documents contain at least one section. In documents with only one section, the section formatting information is stored in the last paragraph mark of the document along with the last paragraph's paragraph formats. If a document contains two or more sections, the end of each section (except the

last one) is indicated by a section break, as shown in Figure 1-14. To see the section break, you must be viewing the paragraph marks; use the Show/Hide Paragraphs button on the Home tab to specify whether they're showing.

**Figure 1-14:**  
The section  
mark.



The section break contains the section formatting information, just as a paragraph mark contains paragraph formatting. As a result, if you delete a section break, the sections before and after the break combine and use the formatting information from the section that followed the break. The text in parentheses shows you how the start of the section is set (Continuous, Next Page, Even Page, or Odd Page).

The one thing that the commands relating to sections usually have in common is the Apply To drop-down list (like the one in the Page Setup dialog box). The settings on this list let you decide which sections within the document receive the formatting you selected. The choices are

- ◆ **Whole Document:** The formatting is applied to the entire document, including any existing sections.
- ◆ **This Point Forward:** Word adds a section break at the cursor position and applies the formatting to the new section. Thus, text that follows the cursor is formatted but text in front of it is not. If your document already contains sections, the formatting is applied only from the current point to the end of the current section.
- ◆ **This Section:** This option is available only if your document has more than one section and your current selection is entirely within the same section; compare this option with the one in the following bullet. The changes are applied only to the current section.
- ◆ **Selected Sections:** This option is available only if your document has more than one section and your current selection is in more than one section; compare this option to the one in the previous bullet. The changes are applied to all sections that include any part of the selection. So if your selection is from the middle of the first section to the middle of the third section, the changes are applied to the first, second, and third sections because a part of each one was included in the selection. (*Section* and *selection* sound much the same when you're trying to understand this concept — how annoying.)
- ◆ **Selected Text:** This option is available only if you selected some text before setting the formatting. When you select this option, a section break is inserted before and after the selected text.

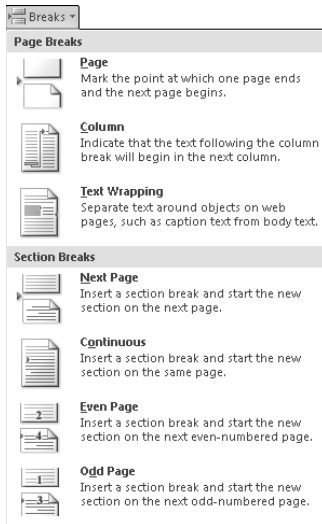
## Creating section breaks

You can create a new section in several ways. One is to use the Breaks gallery from the Page Layout tab on the Ribbon. You can use this method to create a new section that inherits the formatting of the previous section. You can then make whatever formatting changes you want to the new section. To create a new section in this manner, follow these steps:

1. **Position the cursor at the spot where you want the new section to begin.**
2. **Click the Breaks button on the Page Layout tab.**

The Breaks gallery appears, as shown in Figure 1-15.

**Figure 1-15:**  
The Breaks  
gallery lists  
section  
breaks in  
its bottom  
portion.



3. **Select one of these four section break types:**

- *Next Page*: Creates a new section that begins at the top of the following page.
- *Continuous*: Creates a new section that begins on the next line of the same page. This type of section break is commonly used in changing the number of columns on a page.
- *Even Page*: Creates a new section that begins on the next even-numbered page.
- *Odd Page*: Creates a new section that begins on the next odd-numbered page.



You can also use the Breaks gallery to create a page break or a column break. A *page break* simply “skips” the text to the top of the next page without starting a new section. A *column break* skips to the top of the next column. For more information about column breaks, see Chapter 2 of this minibook.

## Creating sections with different page numbers

Many documents require sections that have different page number formats. For example, many documents require that the first page or two — a cover page and perhaps an inside title page — have no page numbers. Then a section of front matter begins, including a table of contents, an acknowledgments page, and perhaps a preface, foreword, or introduction, which can be numbered with roman numerals (i, ii, iii). Then the body of the document begins, numbered with Arabic numerals starting with 1.

To create a document of this sort, you must use sections to format groups of pages with different numbering schemes. You don’t have to perform a special action for the first group of pages — the ones with no page numbers.

To create the proper page numbering for the front matter, follow these steps:

### 1. Place the cursor at the beginning of the front matter.

If you already inserted a page break so that the first page of the front matter begins at the top of a new page, delete the page break. You’ll insert a section break that forces the front matter to start atop a new page later in this procedure.

### 2. Click the Breaks button on the Page Layout tab to display the Breaks gallery.

### 3. Choose Next Page.

This action inserts the section break that forces the front matter to start at the top of the next page.

### 4. (Optional) Choose Edit Footer from the Footer gallery on the Insert tab if you want the page numbers to appear at the bottom of the page.

Use Edit Header from the Header gallery if you want the numbers to appear at the top of the page.

### 5. Click the Link to Previous button to detach the footer from the previous section’s footer.

### 6. Open the Page Number gallery by clicking the Page Number button on the Insert tab.

### 7. Select the formatting you want to use from the Page Number gallery.

If you’re working with the footer, you should select from the Bottom of Page gallery. If you’re working with the header, select from the Top of Page gallery.

- 8. Choose the Format Page Numbers command from the Page Number gallery on the Insert tab.**

The Page Number Format dialog box appears. (Refer to Figure 1-12.)

- 9. For the front matter, choose the roman numeral number format (i, ii, iii) in the Number Format list box.**
- 10. Click the Start At option and select 1.**
- 11. Click OK.**

The Page Number Format dialog box disappears.

You can follow a similar procedure to begin a new section of page numbering for the body of the document, using Arabic rather than roman numerals.

# Chapter 2: Formatting Fancy Pages

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## *In This Chapter*

- ✓ Creating columns
- ✓ Adjusting column width
- ✓ Forcing a column break
- ✓ Adding a cover page
- ✓ Inserting a background
- ✓ Adding a page border

**I**f you use Word to create newsletters and brochures and other documents for which you should be using a desktop publishing program such as Adobe InDesign, you'll be happy to know that Word enables you to create beautiful two- or three-column layouts. (You can create as many as ten columns on an 8½-x-11-inch page in portrait orientation, but the columns are so narrow they are virtually useless.)

Word refers to two- and three-column layouts as *newspaper-style* columns, but that term is a bit misleading. To implement a true newspaper-style column feature, Word would have to edit your prose automatically as you type so that it focused on bad news and added a distinct left- or right-wing slant to your text.

This chapter jumps headfirst into setting up newspaper-style columns in Word, so get ready to slice your page into columns of text.

## *Creating Columns*

When you create multiple columns, the column layout applies to the entire section. If the entire document consists of just one section, the column layout applies to the entire document. If you want part of the document to have one column and another part to have two or three columns, you have to create two or more sections to accommodate the different column layouts. (Chapter 1 in this minibook talks about working with sections.)

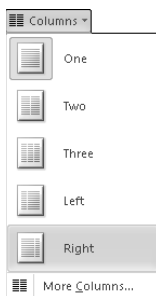
## *Creating columns the easy way*

Here's the easiest way to create multiple columns in your document:

- 1. Click the Columns button on the Page Layout tab on the Ribbon.**

The Columns menu, shown in Figure 2-1, appears. This menu lets you format the page with one, two, or three evenly spaced columns. You can also format the page with two columns in which either the left column is narrower than the right or the right column is narrower than the left.

**Figure 2-1:**  
The  
Columns  
menu.



- 2. Select the number of columns you want.**

*Voilà!* The document is formatted with the number of columns you chose.

If you want more than three columns, take a nice, long walk to clear your head of such nonsense. If you still want four or more columns when you return, use the More Columns option to specify the number of columns you want. For more details, see “Creating columns the hard way,” later in this chapter.

When you create a multicolumn layout, Word ensures that you're using Print Layout view so that the columns are visible side by side onscreen. If you switch to Draft view (on the View tab, click the Draft command), the text is formatted according to the width of the column, but the columns aren't displayed side by side onscreen.

I hope that you didn't choke when you saw the look of your document in columns. You can revert to single-column mode by pressing Ctrl+Z (the magic Undo command) or by using the Columns button to set the layout to one column.



For a quick glimpse of how the columns appear when printed, choose File→Print and look at the right side of your screen. Word shows you how the printed document will appear. When you've seen enough, press Esc or click any Ribbon tab to return to your document.



## Creating columns the hard way

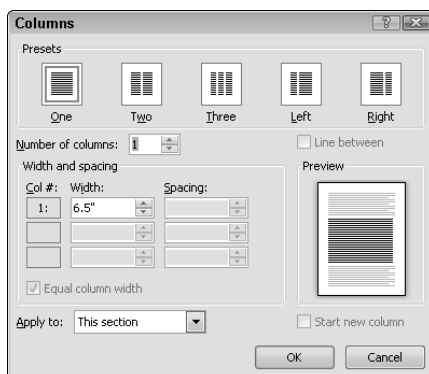
For more control over the appearance of columns, use the Columns command. Grab a cup of coffee and follow these steps:

1. **Move the insertion point to the location in the document where you want the columns to begin.**

If you want to apply columns to the entire document, the location of the insertion point doesn't matter.

2. **Click the Columns button on the Page Layout tab, but rather than pick one of the easy preset selections from the drop-down menu, choose the More Columns command at the bottom of the menu.**

You're greeted by the Columns dialog box, shown in Figure 2-2.



**Figure 2-2:**  
The  
Columns  
dialog box.

3. **Click one of the five preset column layouts.**

These choices are the same ones from the drop-down menu. If you want even more columns, you can tell Word how many to create by entering a number in the Number of Columns control.

4. **Change the Width or Spacing fields, if you must.**

To change the width of the columns, change the Width field. To change the amount of space between columns, change the Spacing field.

Word wants to make all columns the same width, so when you change one, Word insists on changing all the others. If you want to make Word stop doing that, deselect the Equal Column Width check box.

5. **Click the Line Between button if you want a line to appear between columns.**

This line falls between the stuff you read, not the stuff you read between the lines.



6. Periodically peer at the preview box to see whether you like the column layout.
7. Here's the tricky part: You have to decide which parts of your document to turn into columns.
  - If you choose *This Point Forward*, Word adds a section break at the cursor position and applies the column layout to the new section. Thus, text that follows the cursor is formatted in columns, but text that comes before the cursor isn't. When you have more than one section, however, the behavior of This Point Forward changes a bit — it formats only to the next section break.
  - If you choose *Whole Document*, the column layout applies to the entire document.
  - If you selected some text before opening the Columns dialog box, you can use the *Selected Text* option to change the columns for only that text. When you select this option, a section break is inserted both before and after the selected text.
  - If your document already has more than one section, choosing *This Section* applies the changes to the text in the current section. (If you have text selection from more than one section, the option is *Selected Sections* and the text in all sections changes.) For more about sections, see Chapter 1 in this minibook.
8. Click OK.

Excellent!

Here are some things to remember as you twiddle with the Columns dialog box:



- ♦ If you select the Equal Column Width check box, Word balances the columns evenly. If you deselect this check box, you can create columns of uneven width.
- ♦ Select the Apply to This Point Forward option to create a headline or title that spans the width of two or three columns. Start by creating the headline, using a large font and centering it. Position the cursor at the beginning of the line after the heading and then use the Columns command to create a two- or three-column layout. Set the Select Apply To field to This Point Forward to throw the columns into a new section so that the headline remains in a single column.

## *Adjusting the Column Width*

If you don't like the width of columns you create, you can change them at any time, in one of these two ways:

- ◆ Click the More Columns button in the Columns group on the Page Layout tab and experiment with the Width and Spacing fields.
- ◆ Click and drag the *column marker*, the box-like separator between columns on the Ruler. If you selected the Equal Column Width check box in the Columns dialog box, all column markers move in concert to preserve the equal column widths. Otherwise, you can adjust column markers individually.

Here are some things to remember when you adjust column width:



- ◆ Even if you use unequal column widths, try to maintain the same width between columns. Otherwise, you create an unbalanced look.
- ◆ When adjusting column width by dragging the column marker, hold down the Alt key before clicking. Doing so causes Word to display measurements that show the width of each column and the size of the space between columns.
- ◆ Any formatting applied to paragraphs in columns is still in effect. If you specified a ½-inch left indent in a paragraph, the paragraph is indented half an inch from the left column margin. This indentation reduces the column width.

## Forcing a Column Break

Left to its own devices, Word decides when to “jump” text from the bottom of one column to the top of the next column. Sometimes, however, you want to intervene and insert a column break of your own.

Follow these steps to force a column break:

- 1. Place the insertion point where you want the new column to begin.**
- 2. Press Ctrl+Shift+Enter.**

Or, click the Breaks button on the Page Layout tab (which displays a variety of breaks to choose from) and choose Column Break

In Draft view, a column break is indicated in the text by a solid line running all the way across the screen. In Page Layout view, the column break is obvious when you see the text jump to the next column.



Don't try to create two or three columns of equal length by inserting column breaks where you think the bottom of each column should fall. Instead, insert a continuous section break at the end of the last column. A continuous section break balances all columns in the section so that they're of equal length and then starts a new section without forcing a page break. To insert a continuous section break, click the Breaks button on the Page Layout tab and then choose Continuous.

## Using linked text boxes to create columns

Word offers an alternative to the Columns command for creating complex, multicolumn layouts: the linked text box. A *linked text box* is a drawing object that contains text. You can link a series of text boxes so that if the first text box isn't large enough to contain all the text,

the text spills over to the second text box. If the second text box isn't large enough to show all the text, Word adds a third text box to the link. Turn to Book IV, Chapter 5 if you want to know more about using text boxes.

## Adding a Cover Page

Many documents have an attractive first page that includes the document title and perhaps the author's name. That information is frequently repeated in the header or footer on each page. Word 2010 provides an easy way to add a cover page.

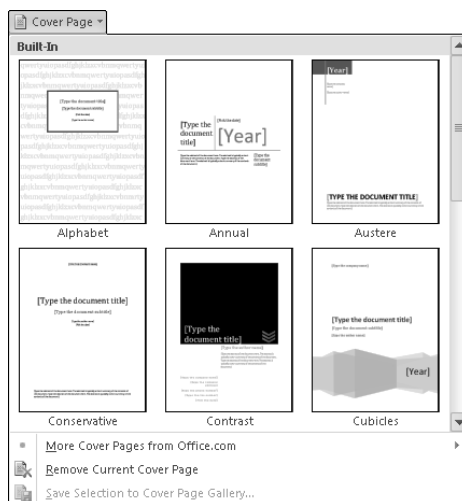
To add a cover page to your document, follow these steps:

**1. Click the Cover Page button on the Insert tab.**

The Cover Page gallery, shown in Figure 2-3, appears.

**2. Click the cover page that you want to add to your document.**

Word knows to put the cover page at the start of your document. If you want to place it elsewhere, right-click the cover page in the gallery and select the location you want from the menu that appears.



**Figure 2-3:**  
The Cover  
Page  
gallery.

Most cover pages have areas where you can type the title of your document and the author's name. If you complete this information on the title page, the headers and footers that include the title or author name or both also display the correct information. Many cover pages also have areas for the subtitle and an abstract.

## Creating a Background

Word provides several commands for adding a background to your document. The background might be a *watermark* (a faint image behind the text of your document), a background color, a background image, or a border around your text. A watermark is commonly added to a printed document to provide a reminder to the reader about the status of the document (such as confidential or draft). Backgrounds are most often used online because you can use colored paper in your printer rather than use lots of ink to color the paper.

### Adding a watermark

Watermarks are most useful for printed documents because they aren't displayed in Web Layout view. And, although a watermark can let readers know that a document is confidential, it isn't as good at protection as the features discussed in Book V, Chapter 3. You must use the same watermark for all pages in your document.

To add a watermark, follow these steps:

1. **Click the Watermark button on the Page Layout tab.**

The Watermark gallery, shown in Figure 2-4, appears.



**Figure 2-4:**  
The  
Watermark  
gallery.

2. Click a watermark to insert it or select **Custom Watermark** from the bottom of the gallery.

If you elect to add a custom watermark, the Printed Watermark dialog box, shown in Figure 2-5, appears. You can select a picture to be used for the watermark by selecting the Picture Watermark option and then using the Select Picture button to find the file that contains the image you want to use. For most images, you leave the Washout option selected, which makes the image look faded and therefore makes the text on top of the image easier to read.

**Figure 2-5:**  
The Printed  
Watermark  
dialog box.



You can add text to your watermark by selecting the Text Watermark option in the Printed Watermark dialog box. You can then use the controls to select the language for the watermark and the text to be used. You can format the text by using the remaining controls, including deciding whether the text should be diagonal or horizontal.

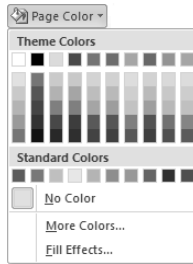
To remove a watermark from your document, select the Remove Watermark command from the bottom of the Watermark gallery.

## *Adding a background*

Page backgrounds are intended to be used primarily for online documents. By default, Word doesn't print the page background, so if you want it to print, go to the Display tab of the Word Options dialog box and select the Print Background Colors and Images check box.

To add a solid color as a background to your entire document, select a color from the Page Color control on the Page Layout tab on the Ribbon, as shown in Figure 2-6.

**Figure 2-6:**  
The Page  
Color  
gallery.



To add a gradient, pattern, texture, or picture, select the Fill Effects command from the bottom of the Page Color control. The Fill Effects dialog box puts in an appearance on your screen. On each tab of the Fill Effects dialog box, you can add a different type of background. Both the Texture tab and the Picture tab let you select an image file to use for the background. The Texture tab repeats the picture to fill the entire background, whereas the Picture tab centers the image.

Note that a document can have only one background for all pages in the document.

## Adding a page border

Unlike a watermark or background, a page border is assigned to a section. Therefore, different sections in your document can have different borders. For more information about sections, see Chapter 1 in this minibook.

To add a page border, follow these steps:

- 1. Click the Page Borders button on the Page Layout tab.**

The Borders and Shading dialog box opens to the Page Border tab, shown in Figure 2-7.

- 2. Select either a line or an art object to use as the border.**

You can select either a style and color for the line by using the top two drop-down lists in the center of the dialog box or a repeated image from the Art drop-down list at the bottom of the dialog box.

- 3. Select the border width.**

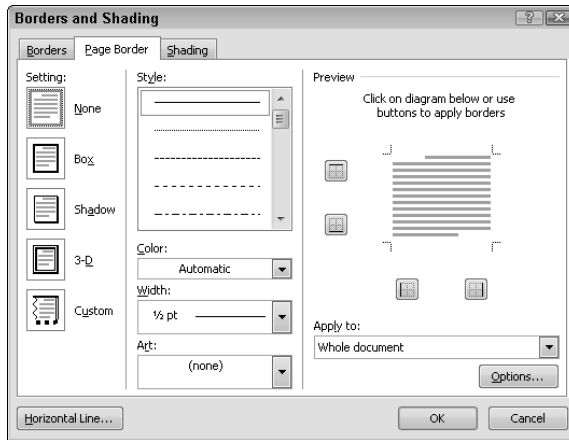
The border must fit within the margins of the page, and you want to keep some space between the border and your text.

- 4. Decide which sides of the page will have the border.**

You can use the preset Box, Shadow, or 3D options on the left side of the dialog box or select the Custom option on the left and use the controls on the right to select the sides that have the border.



**Figure 2-7:**  
The Page  
Border  
tab of the  
Borders and  
Shading  
dialog box.



**5. If you want different sections to have different borders, use the Apply To drop-down list.**

For more on working with sections, see Chapter 1 of this minibook.

**6. Click OK.**

The border is displayed only in Print Layout view on the Print page in Backstage view.

To remove the border from a section, follow the same steps but select the None option in Step 4.

Although the same document can have a watermark, a page background, and a page border, that combination is generally appropriate only for a document such as a certificate or an award.



# Chapter 3: Creating Lists

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## *In This Chapter*

- ✓ **Creating bulleted lists and numbered lists the easy way**
- ✓ **Formatting a list**
- ✓ **Using different bullets and number formats**
- ✓ **Creating your own bullets and number formats**
- ✓ **Working with lists that have more than one level**

**B**ulleted lists and numbered lists are useful ways to add emphasis to a series of important points or to add a sense of order to items that fall into a natural sequence. Glance through this book to see what I mean. It's loaded with bulleted and numbered lists.

In Word, you can add a bullet or a line number to each paragraph. The bullet or number is a part of the paragraph format, and Word adds the bullet character or the number so that you don't have to. Word even keeps the numbers in a numbered list in sequence so that if you add or delete a paragraph or rearrange paragraphs in the list, the numbers reorder automatically.

Several examples in this chapter walk you through the steps for using bullets, but almost anything you can do with bullets can also be done with number formats, and the steps are basically the same.

## *Creating a List Automatically*

The AutoFormat feature in Word can create bulleted and numbered lists automatically whenever Word determines that you're trying to create a bulleted or numbered list. In previous versions, this feature was a somewhat hit-and-miss proposition, but it seems to be working much better in Word 2010. I suggest giving it a try and then deciding whether you prefer another approach (such as using the buttons on the Ribbon, as I describe later in this chapter).

One minor change from previous versions of Word is that Word recognizes your list as soon as you type a space or a tab. No more waiting around for the end of the paragraph — talk about your instant gratification.

- ◆ Word automatically formats text as a bulleted list whenever you begin a paragraph with a character that it matches to one of its rules. You can use any special character described in Table 3-1 to start a list.
- ◆ Word automatically formats text as a numbered list whenever you type a number followed by a period, hyphen, right parenthesis, or greater-than sign (>) and a space or tab. Word also starts a lettered list if you type the letter *a* (either upper- or lowercase) followed by a period, hyphen, right parenthesis, or greater-than sign and a space or tab; or a list numbered with roman numerals if you type the letter *i* (either upper- or lowercase) followed by a period, hyphen, right parenthesis, or greater-than sign and a space or tab.

<b>Table 3-1      Bullet Codes That Word Recognizes</b>	
<i>Type This</i>	<i>To Create This Bullet</i>
*	<Insert character 183 from the Symbol font>
>	<Insert character 216 from the Wingdings font>
<>	<Insert character 168 from the Symbol font>
->	<Insert character 232 from the Wingdings font>
-	<Insert a hyphen from the current font>



If you want to insert in the middle of your list a paragraph that doesn't have a bullet on it but lines up with the list item text, just press Backspace once to remove the bullet or number. If you want the text to line up with the bullets or numbers, press Backspace again.



If you don't want this automatic formatting to occur, open the Word Options dialog box by choosing File⇨Options and then selecting Proofing view. Click the AutoCorrect Options button, click the AutoFormat As You Type tab, and deselect the Automatic Bulleted Lists and Automatic Numbered Lists options.

## *Creating a List the Button Way*

Aside from creating lists automatically, no task is easier than clicking a button, and that's about all you have to do to create a simple bulleted or numbered list in Word. With the click of a button, you can create a bulleted list like this one:

- ◆ Cheery disposition
- ◆ Rosy cheeks

- ◆ No warts
- ◆ Plays games, all sorts

Click another button, and you transform the whole thing into a numbered list:

1. Cheery disposition
2. Rosy cheeks
3. No warts
4. Plays games, all sorts

One advantage to using the buttons to create lists is that the buttons remember the last format you used. So, if you use a fancy bullet in one part of your document, when you apply bullets by clicking the button elsewhere in your document, the same bullet is applied. But the buttons have only short-term memory — if the insertion point is next to or within a list, the format of that list is used. Otherwise, the last format you applied is used.

## Creating a bulleted list

To create a bulleted list, follow this procedure:

1. **Type the first item on your list.**

Don't press Enter yet.



2. **Click the Bullets button on the Home tab.**

A bullet is added to the paragraph.

3. **Press Enter to begin the next item.**

A new paragraph with a bullet is created.

4. **Type the rest of the list.**

Press Enter after you type each item in the list. Word automatically adds bullets to each new paragraph.

5. **When you're done, press Enter twice.**

Pressing Enter the second time removes the bullet from the last item in the list.

When you create a bulleted list this way, Word uses a default bullet character (normally a small dot) and creates a 1/4-inch hanging indent. (If the paragraphs already have hanging indents, the original indentation settings are preserved.) To discover how to use oddball bullets, find the section "Using a different bullet or number format," later in this chapter.



Here are a few additional tricks for bulleting your lists:

- ◆ To add more items to a bulleted list, position the insertion point at the end of a bulleted paragraph and press Enter. The bullet, because it's part of the paragraph format, is carried over to the new paragraph.
- ◆ You can add bullets to existing text. Just select the paragraph or paragraphs you want to riddle with bullets and then click the Bullets button.
- ◆ You can remove bullets as easily as you add them. The Bullets button works like a toggle: Click it once to add bullets; click it again to remove them. To remove bullets from an entire list, select all paragraphs in the list and click the Bullets button.
- ◆ Ever notice how the good guys in the movies never run out of bullets? Well, try not to be like the good guys. The old notion of the six-shooter is a good one: Placing more than six bullets in a row pushes the limits of just about any reader's patience. (Of course, I routinely disregard that advice throughout this book, but what are you going to do — shoot me?)
- ◆ Oh, and by the way, you probably shouldn't leave one bullet standing by itself. Bullets are used to mark items in a list, and you need more than one item to make a list. ("Army of One" is a good slogan for the military, but "List of One" is a lousy slogan for any document.)

## *Creating a numbered list*

To create a numbered list, follow this procedure:



### **1. Type the first item on your list.**

Don't press Enter yet.

### **2. Click the Numbering button on the Home tab.**

A number is added to the paragraph.

### **3. Press Enter to begin the next item.**

A new paragraph with the next number in sequence is created.

### **4. Type the rest of the list.**

Press Enter after you type each item on the list. Word automatically adds numbers to each new paragraph.

### **5. When you're done, press Enter twice.**

Pressing Enter the second time removes the number of the last item in the list.

When you click the Numbering button to create a numbered list, Word uses a default numbering format and establishes a 1/4-inch hanging indent for each paragraph. (If the paragraphs are already formatted with hanging indents,

Word maintains the original indentation settings.) You can use all sorts of crazy numbering schemes, if you want; to find out how, skip to the section “Creating Crazy Numbering Schemes.”



If you want to insert in the middle of your list a paragraph that doesn’t have a number on it but lines up with the text of the numbered items, place the insertion point at the beginning of the paragraph and just press Backspace once to remove the number. If you want the text to line up with the numbers, press Backspace again.

Word is cool about keeping the list in order. If you add or delete a paragraph in the middle of the list, Word renumbers the paragraphs to preserve their order. If you add a paragraph to the end of the list, Word assigns the next number in sequence to the new paragraph.

You can also apply numbering to existing text. Just select the paragraph or paragraphs you want to number and then click the Numbering button on the Home tab.

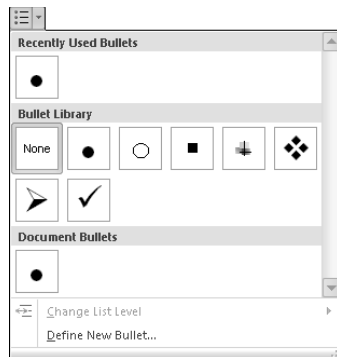


The Numbering button works like a toggle: Click it once to add numbers to paragraphs; click it again to remove them. To remove numbering from a numbered paragraph, select the paragraph and click the Numbering button. To remove numbering from an entire list, select all paragraphs in the list and click the Numbering button.

## Using a different bullet or number format

Word 2010 includes nifty little arrows next to the Bullets and Numbering buttons. Well, the little arrows aren’t *that* neat, but the galleries they reveal are cool. When you click the arrow next to the Bullets button, the gallery shown in Figure 3-1 is revealed.

**Figure 3-1:** The Bullet Library shows your collection of bullets.



The Bullet Library in the gallery lets you store a collection of your favorite bullets. You can store a couple hundred, but most people don't use more than a few dozen. Don't be greedy.

After you start working with bullets in your document, additional items may appear in the gallery. For example, the Document Bullets section initially includes just a single bullet type, but additional types will appear here if you use additional bullet types in your document. And a Recently Used Bullets section will appear, listing the last few bullets you've applied by using the button.

What's useful is that you can add a bullet from either of these sections to your Bullet Library by following these steps:

- 1. Display the Bullets gallery by clicking the down arrow next to the Bullets button.**

You should see the bullet you want to add. If not, find a document that already uses that bullet (or add the bullet to a document) and try again.

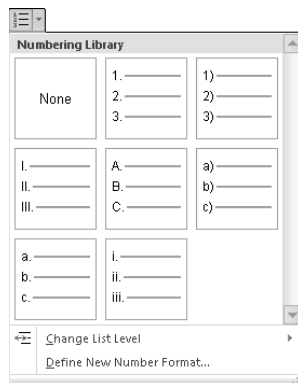
- 2. Right-click the bullet you want to add to your Bullet Library and choose Add to Library.**

That's all you need to do. The bullet is now available for all your documents.

Of course, if you grow tired of a bullet, you might want to throw it out of the library. To remove a bullet from the Bullet Library, right-click the bullet and choose Remove. Note that this command doesn't remove the bullet from the lists in your document.

If Word offered this feature only for bullets, the numbers would sulk and refuse to work. If you click the down arrow next to the Numbering button, you discover that the same type of gallery exists for numbers, as shown in Figure 3-2. Even better, everything I just described for bullets works as well for numbers.

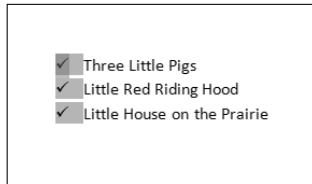
**Figure 3-2:**  
The  
Numbering  
Library  
shows your  
collection  
of number  
formats.



## Formatting a List

Two of the most interesting ways you can format a list are by changing the font formatting used for the list character (the bullet or number format) and by changing the indent of the list. When you click a bullet used in a list, the bullets for all paragraphs in that list are lightly highlighted, as shown in Figure 3-3.

**Figure 3-3:**  
Click one  
bullet to  
select  
others.



The same technique works for selecting all numbers in a numbered list. And although the following step list describes working with a bulleted list, you can do exactly the same thing with a numbered list.

With the bullets selected, you can use any font formatting control on the Home tab to change the formatting of the character used as the bullet symbol. Using this technique, you can change the size or color of any individual list without creating your own bullet. However, if you want to use that format frequently, you might want to have that bullet in your Bullet Library, which is described in the following section.

You can also change the position of the bullet and the text in the list by following these steps:



**1. Click a bullet in the list to ensure that the entire list is selected.**

You must select the list rather than one or more of the items in the list. If you select the paragraph before performing these steps, only the selected paragraph changes, not the entire list.

**2. Right-click a bullet in the list and choose Adjust List Indents.**

The Adjust List Indents dialog box appears, as shown in Figure 3-4.

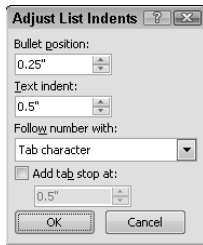
**3. Change the value of the Text Indent option to control where the text is positioned.**

By default, Word positions the text at a half-inch indent.

**4. Change the Bullet Position option to specify how far to place the bullet from the left margin.**

The greater this value, the closer the bullet is to the text.

**Figure 3-4:**  
The Adjust  
List Indents  
dialog box.



5. **If you're creating lists in which you want the bullet to be part of the text rather than separated by a tab, change the selected element in the Follow Number With drop-down list.**

Try to ignore the *Number* wording when you're working with bullets. Even Microsoft makes mistakes.

6. **If you want to insert a tab on each line in the list, select the Add Tab Stop At option.**

The primary reason to complete this step is to match the way in which lists were created in previous versions of Word. When this option is active, you can specify the location of the tab stop to be inserted.

7. **Click OK.**

Ensure that your list is now neatly lined up where you want it. If it isn't, make further adjustments by following these steps again.



Word 2010 now uses a special List Paragraph style for formatting lists. This paragraph style determines the initial font formatting used for the text in your list and for the spacing between paragraphs and between lines in the paragraphs. See Book II, Chapter 3 for more information about modifying the formatting used by a style.

## *Creating Deviant Bullets*

If you don't like any of the choices available in your Bullet Library and you want to create a new one of your very own, here's how to do it:

1. **Click the arrow next to the Bullets button on the Home tab.**

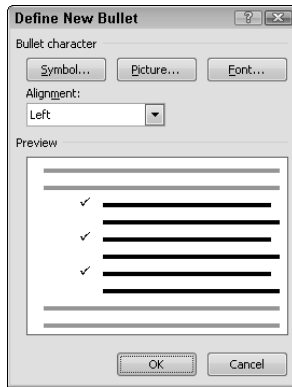
Behold! The Bullets gallery appears.

2. **Choose the Define New Bullet command from the bottom of the Bullet gallery.**

The Define New Bullet dialog box appears, as shown in Figure 3-5.



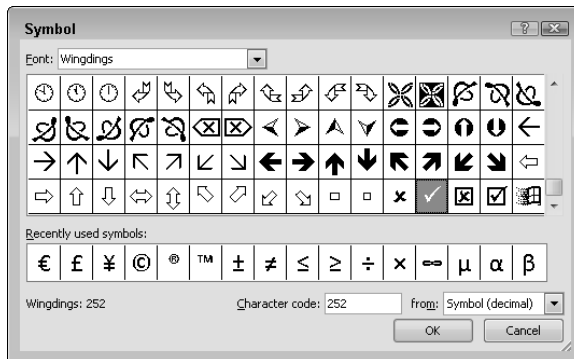
**Figure 3-5:**  
Formatting  
your own  
bullets.



**3. If you want to use a character for the bullet, click the Symbol button.**

The Symbol dialog box, shown in Figure 3-6, appears.

**Figure 3-6:**  
Pick a  
symbol to  
use for your  
bullet.



**4. Pick the bullet character you want; then click OK.**

You can change the characters displayed by choosing a different font from the Font drop-down list. Find the character you want to use, click it, and then click OK.

**5. (Optional) If you want to control the color or size of the character you're using, click the Font button to select formatting.**

The formatting you apply appears when the bullet is used for normal text.

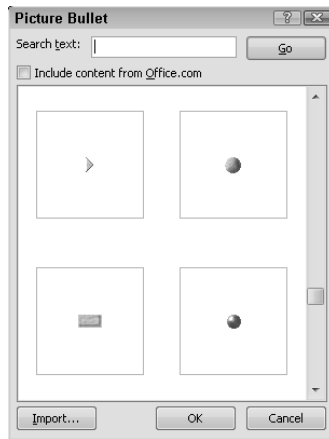
**6. Click the OK button repeatedly to work your way back to the document.**

Keep clicking OK until you return to your document so that you can see the results of your bullet formatting efforts. Note that the bullet you just created is automatically added to your Bullet Library.

Keep these points in mind when changing your bullets:

- ◆ The Wingdings font (which comes with Windows) is filled with useful bullet characters: Select a pointing finger, smiley face, grumpy face, thumbs-up symbol, thumbs-down symbol, peace sign (if you were at Woodstock), time bomb, or a skull-and-crossbones. (“Yo ho, yo ho, a pirate’s life for me!” I love that song more than Johnny Depp does!)
- ◆ When you’re defining your bullet and you want to use a picture for it rather than a symbol, click the Picture button (rather than the Symbol button) in Step 3, select the image you want to use, and then click OK. Figure 3-7 shows the Picture Bullet dialog box, which helps you choose a nice picture to use for your bullets. You cannot apply font formatting to picture bullets.

**Figure 3-7:**  
From the  
Picture  
Bullet dialog  
box, you  
pick an  
image to  
use for your  
bullet.



## *Creating Crazy Numbering Schemes*

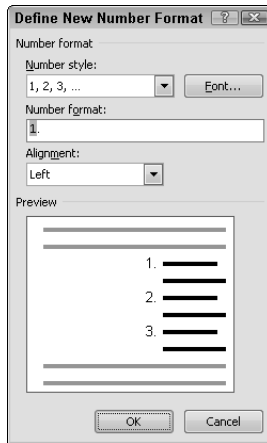
Most people like to count 1, 2, 3, and so on. But some people count A, B, C or maybe I, II, III, like a Roman. Not to fear. In Word, you can count just about any way you like.

Follow these prudent steps to create your own crazy numbering schemes:

- 1. Click the arrow next to the Number button on the Home tab.**  
The Numbering gallery appears. It dutifully awaits your command.
- 2. Choose the Define New Number Format command from the bottom of the Numbering gallery.**

The Define New Number Format dialog box appears, as shown in Figure 3-8.

**Figure 3-8:**  
The Define  
New  
Number  
Format  
dialog box.



### 3. Modify the numbering scheme to suit your fancy.

You can change the number format and change the alignment of the numbers within the list. You can also type text to include before or after the number or both. The most common type of text that's included with a number is punctuation following the number. So when you want a number format to look like 1 ), the closing parenthesis is included as text after the number — you just type it directly into the Number Format text box. A common type of text included before a number is a label such as Chapter or Section, particularly when the numbering is used with the heading styles, as described later in this chapter in the section “Numbering your headings.”

By default, Word aligns most numbered lists to the left of the number (so that when 10 appears under 9, the 1 is lined up under the 9). If you want your 10 to line up under your 9 with the 0 under the 9, select the Right option in the Alignment drop-down list. Figure 3-9 shows an example of a list with the numbers right-aligned.

**Figure 3-9:**  
A list with  
numbers  
that are  
right-  
aligned.

1. Partridge
2. Turtle Doves
3. French Hens
4. Calling Birds
5. Golden Rings
6. Geese
7. Swans
8. Maids
9. Ladies
10. Lords
11. Pipers
12. Drummers



If you want to specify a different font for the numbers, click the Font button when the Define New Number Format dialog box appears. The font applies not only to the number but also to any text that appears before or after the number.

### 4. Click OK.

Happy numbering! The number format is now stored in your Numbering Library.

Keep these points in mind when using numbered lists:

- ◆ You can specify, in addition to normal number formats (such as 1, 2, 3 or A, B, C), One, Two, Three; 1st, 2nd, 3rd; or even First, Second, Third as the number format. Believe it or not, these oddball formats work even with unreasonably long lists. Try it and see for yourself: Word knows how to spell one-thousand one-hundred eighty-seventh. It also knows that the Roman numeral equivalent is MCLXXXVII. Isn't that amazing?
- ◆ You can add text that appears before or after the number by typing the text into the Number Format text box. Note that the number is shown in the Number Format text box with a gray background.

## *Breaking and Continuing a Numbered List*

The menu you see when you right-click a number in a numbered list includes two options that are useful in two situations:

- ◆ **Restart at 1:** Use this option when you want to begin a new numbered list, even if the paragraph is in the middle of an existing numbered list. You can also use this option to work with two or more numbered lists that are adjacent to one another.
- ◆ **Continue Numbering:** Use this option when you want to insert a nonnumbered paragraph in the middle of a numbered list but you want the list numbering to continue in sequence across the unnumbered paragraph.

Here are a couple of troubleshooting tips:

- ◆ If you're trying to create a new numbered list but the number for the first paragraph in the list refuses to start at 1, right-click the number and select the Restart at 1 command.
- ◆ On the other hand, if a paragraph in the middle of a list insists on starting with the number 1, try selecting the Continue Numbering option.

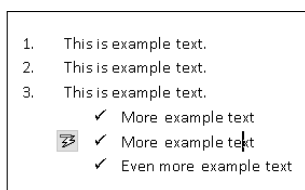
The Set Numbering Value command, found on the menu that appears when you click the arrow next to the Numbering button on the Home tab, lets you do both these tasks and lets you set a starting value for the list if you want

it to start at a value other than 1. Such lists are useful in some cases, but be careful. You can easily set a starting value and then forget and wonder why it now has such strange numbering.

## Working with Lists with Two or More Levels

Not all lists are simple one-level lists, like the ones I've been describing. In some cases, you want to have a second level with a different format. Figure 3-10 shows an example.

**Figure 3-10:**  
This list has  
two levels.

- 
1. This is example text.
  2. This is example text.
  3. This is example text.
    - ✓ More example text
    - ✓ More example text
    - ✓ Even more example text

Some people go completely crazy making lists with three or four levels. Word doesn't mind because it can manage lists with as many as nine levels. Beyond that, you're on your own.

To create a list at an indent level, you can just press Tab at the start of the paragraph. If you're on the first item of your list, the indent position for the list changes so that more white space appears to the left of the list. But if you're within a list, every time you press Tab, the numbering moves to the next level of the list. If you're more of a button person, you can use the Increase Indent button on the Home tab.

To move an item up a level in the list (for example, from the second level to the first level) while creating a list, you can press Enter. However, this shortcut works only before you start typing text on the line. After you create the paragraph, you can press Shift+Tab at the start of the paragraph or the Decrease Indent button on the Home tab.



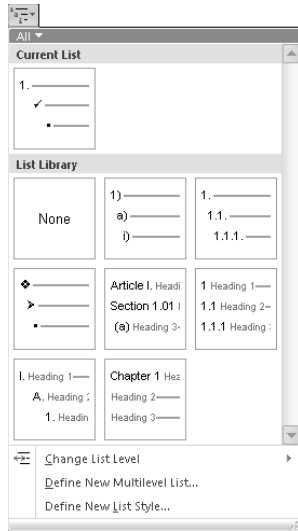
When you're at the end of a list, pressing Enter removes the number and returns the insertion point to the left margin. If you want to remove the number but not change the position of the text (at any level), press Backspace.

## Changing the Look of a List with Many Levels

You can create compulsive outline lists that can satisfy even the most rigid anthropology professor by using Word's numbering feature. I wouldn't wish this task on anyone, but if you must create these types of lists, this feature is a godsend.

## 212 *Changing the Look of a List with Many Levels*

Next door to the traditional Bullets and Numbering buttons on the Home tab is a button Multilevel List. When you click this button, the gallery shown in Figure 3-11 appears.



**Figure 3-11:**  
The  
Multilevel  
List gallery.

When the gallery appears, all paragraphs associated with the current list are selected. This selection is similar to the one you see when you click a bullet or number, but it extends to all levels within the list. You can select an entry on the gallery to change the formatting of the entire list.



If you hover the cursor over an entry in the List Library section of the Multilevel List gallery, a sample showing all nine levels of the list is displayed.

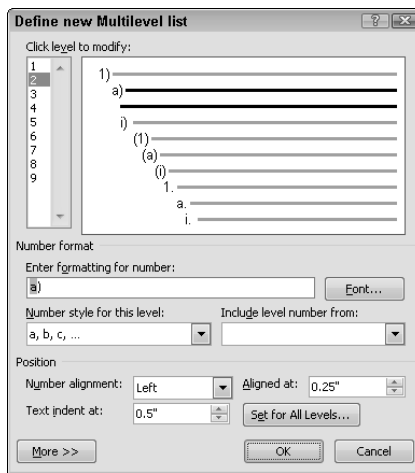
The entries on the Multilevel List gallery are of two types: traditional, old-fashioned, multilevel lists and new, improved list styles. The differences between the two are that list styles have names and can be modified. Traditional multilevel lists can't be modified, so to change a list, you have to create a new multilevel list and replace the old one you were using. The problem with that approach is that your document can become cluttered with unused list definitions. But the advantage to multilevel lists is that they can be added to your List Library and are available for any document you create; list styles occupy their own section of the Multilevel List gallery and have to be copied from document to document.

## Crafting your own multilevel list

Suppose that you don't have a multilevel list that you like. Well, just as with bullets and numbers for single-level lists, you can create your own. Here's an outline of the procedure for creating a multilevel list:

### 1. Click the Define New Multilevel List link at the bottom of the Multilevel List gallery.

The Define New Multilevel List dialog box appears, as shown in Figure 3-12. You use this dialog box to customize each level of an outline list.



**Figure 3-12:**  
The Define  
New  
Multilevel  
List dialog  
box.

### 2. Select the level you want to work with.

Start with the first level and work your way down. You can select other levels by clicking either the number or the preview of that level number in the Click Level to Modify section of the dialog box.

### 3. Select the number format you want to use for that level.

When working with a number format, you can add text, such as punctuation, to be used with the number by typing in the Enter Formatting for Number text box.

Most multilevel lists involve numbers, so the dialog box is set up to make adding number formats easier. You can add bullets to a level by selecting a Bullet option from the bottom of the Number Style for This Level drop-down list. You can even define your own bullet or use a picture bullet with the New Bullet and New Picture commands at the very end of the drop-down list.

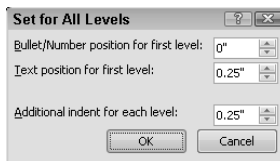
4. **Adjust the formatting to be used for the level, including adding any text, setting the font, and setting the indent position for the list.**

For more information, see the section “Formatting a List,” earlier in this chapter.



If you want all levels to be indented equally with the bullet or number the same distance from the text, click the Set for All Levels button to display its dialog box, shown in Figure 3-13. You can specify the position of the text for the first line, the distance that the bullet should be from the left indent for the first line, and then the amount of space that each additional level should be indented. When you’re done, click OK to return to the Define New Multilevel List dialog box.

**Figure 3-13:**  
The Set for  
All Levels  
dialog box.



5. **(Optional) If you want to use legal or technical numbers (such as 1-1), use the Include Level Number From drop-down list to select which level is included as part of the number format.**

When you select a level from the drop-down list, a placeholder representing the numbering from that level is inserted into the Enter Formatting for Number text box. Ensure that your insertion point is where you want the placeholder inserted before selecting a level (usually at the start of the number format). You probably want to add punctuation between the placeholders for the current level and any other levels you’ve included.

This command is available only for levels 2 through 9.

6. **Repeat Steps 2 through 5 for each level.**

You don’t need to define all nine levels.

7. **Click OK.**

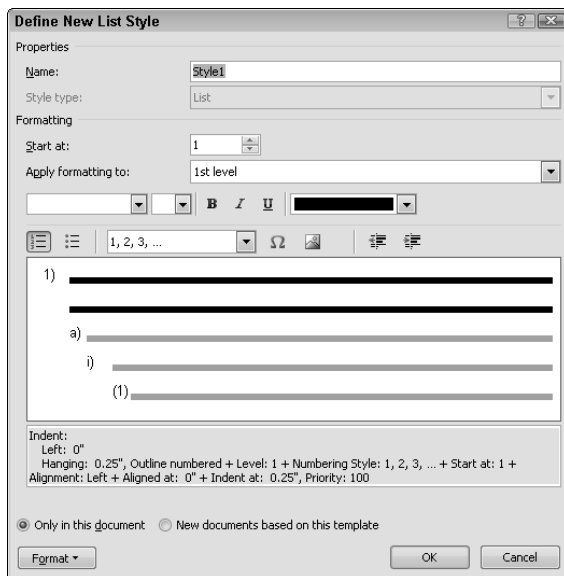
Your new list is now part of your List Library and is ready to go.



Defining a list style follows a similar process but starts with the Define New List Style command. The major differences are that the Define New List Style dialog box, shown in Figure 3-14, lets you give the list style a name and has only some of the controls shown in the Define New Multilevel List dialog box. To open the entire set of controls used for defining multilevel lists, click the Format button in the lower-left corner of the Create New Style from Formatting dialog box and then select Numbering. You can modify an



existing list style by right-clicking it and choosing Modify from the menu. Remember that a list style you create doesn't become part of your List Library.



**Figure 3-14:**  
The Define  
New List  
Style dialog  
box.

## Numbering your headings

If you want to add numbers to a document's headings, you can do so by creating a multilevel list that uses the standard heading styles. Then when you apply heading styles to your document's headings, the heading paragraphs are numbered automatically according to the numbering scheme you created.

Here's the procedure for adding heading styles to a multilevel list:

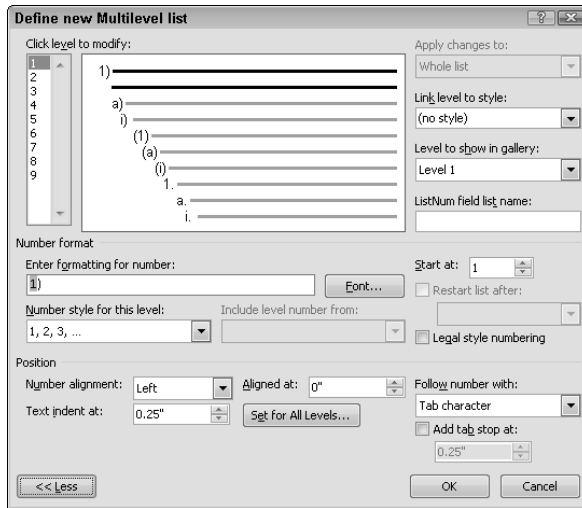
1. **Create the list by following the steps described previously in the section "Crafting your own multilevel list" but don't close the Define New Multilevel List dialog box.**

If you prefer, you can add the heading for each level as you define it, but it's somewhat easier to separate the task of creating the numbering levels from associating them with the headings.

2. **Click the More button to expand the dialog box to the version shown in Figure 3-15.**

Try not to be scared. This dialog box is one of the most complex in all of Word, if not the universe.

**Figure 3-15:**  
The  
complete  
Define New  
Multilevel  
List dialog  
box.



### 3. Select a level of your list and then, from the Link Level to Style drop-down list, select the heading style you want to associate with it.

You can associate the level with any style, but the heading styles are most commonly used.

### 4. Repeat for each level in your list.

You don't have to assign Heading 1 to level 1 and Heading 2 to level 2 and so on, but it surely makes the most sense.

### 5. Adjust any other advanced settings you want to work with.

Most of these settings have already been discussed and aren't difficult to use. They're hidden from normal use because they aren't needed most of the time.

### 6. Click OK.

The multilevel list now appears in your List Library, and the heading styles in your document have been updated to use that numbering pattern. As you apply heading styles, Word automatically applies the number formatting.

You can also change an existing list to use this formatting by selecting it from the List Library.

Heading numbering always applies to all paragraphs in a document formatted with a given heading style. As a result, you can't selectively apply it to some heading paragraphs but not to others.

## *Using Fields to Create Sequence Numbers*

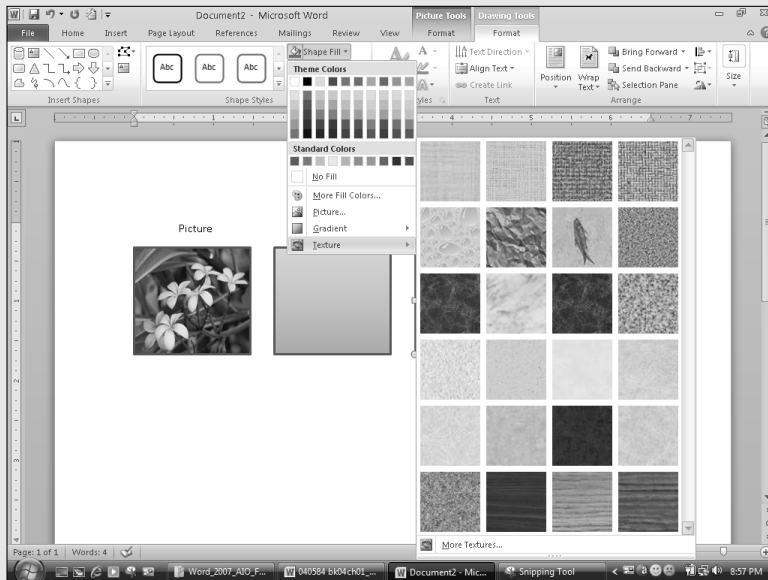
Word's numbered lists are helpful when you have a series of consecutive paragraphs that need sequence numbers. But many documents have lists spread out through the entire document. For example, every chapter in this book has figures numbered consecutively starting with 1. Word's numbered list feature can't help you with this type of list.

Fortunately, the Word field codes feature has a special field named `seq` that's designed just for this purpose. Read Book VIII, Chapter 3 to find detailed information about this Word field code and others.



# Book IV

# Inserting Bits and Pieces



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# Chapter 1: Drawing Shapes on Your Document

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## *In This Chapter*

- ✓ Using the Word drawing tools
- ✓ Using predefined shapes
- ✓ Drawing polygons or curved lines
- ✓ Changing colors and line types
- ✓ Creating 3D objects
- ✓ Flipping and rotating objects
- ✓ Understanding layers and groups
- ✓ Using advanced techniques

*Chim-chimney, chim-chimney, chim-chim cheroo,  
I draws what I likes and I likes what I drew. . . .*

**A**rt time! Gather your crayons and glue and don an old paint shirt. You'll cut out some simple shapes and paste them into your document so that people either believe that you're a wonderful artist or scoff at you for not using clip art.

This chapter covers the drawing features of Word 2010. One of the best things about Word is its array of cool drawing tools. Once upon a time, Word had only rudimentary drawing tools — the equivalent of a box of crayons — but Word now has powerful drawing tools that are sufficient for all except the most sophisticated aspiring artist.

## *Some General Drawing Tips*

Before getting into the specifics of using each Word drawing tool, in the following sections I describe a handful of general tips for drawing pictures.

### *Zoom in*

When you work with the Word drawing tools, you can increase the zoom factor so that you can draw with greater precision. I often work at 200, 300, or even 400 or 500 percent when I'm drawing. To change the zoom factor, use the Zoom Slider located in the lower-right corner of the screen.



Before you change the zoom factor to edit an object, select the object that you want to edit. This way, Word zooms in on that area of the page. If you don't select an object before you zoom in, you might need to scroll around to find the right location.

### *Save frequently*

Drawing is tedious work. You don't want to spend two hours working on a particularly important drawing only to lose it all just because a comet strikes your building or an errant Scud lands in your backyard. You can prevent catastrophic loss from incidents such as these by frequently pressing Ctrl+S or clicking the Save button as you work. And always wear protective eyewear.

### *Remember to use Ctrl+Z*

In my opinion, Ctrl+Z — the ubiquitous Undo command — is the most important keyboard shortcut in any Windows program, and Word is no exception. Remember that you're never more than one keystroke away from erasing a boo-boo. If you do something silly, such as forget to group a complex picture before trying to move it (see "Drawing a Complicated Picture," later in this chapter), you can always press Ctrl+Z to undo your last action. Ctrl+Z is my favorite and most frequently used Word key combination. (For left-handed mouse users, Alt+Backspace does the same thing.) And, if you aren't ready to climb shrieking on a chair at the first sign of a mouse, try clicking the handy Undo button on the Quick Access toolbar.

## *Drawing Simple Objects*

The basic element of every drawing is an *object*. To draw an object, first open the Insert tab on the Ribbon. Then click the Shapes button to reveal the Shapes gallery, shown in Figure 1-1.

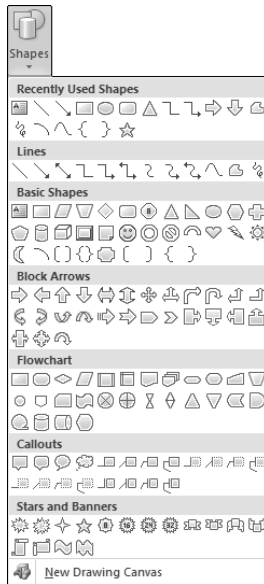
You find in the following sections detailed instructions for drawing with the more important tools.



Before I get to them, though, I give you some pointers to keep in mind:

- ◆ **Choose a location:** Before you draw an object, move to the page on which you want to draw the object.
- ◆ **Fix your mistakes:** You can delete the object you just drew by selecting it and pressing the Delete key.
- ◆ **Hold down the Shift key:** If you hold down the Shift key while drawing a shape, Word forces the shape to be *regular*: Rectangles are squares, ellipses are circles, and lines are either horizontal or vertical.





**Figure 1-1:**  
The Shapes  
gallery.

## Drawing straight lines

You can use the Line button to draw straight lines on your pages. Here's the procedure:

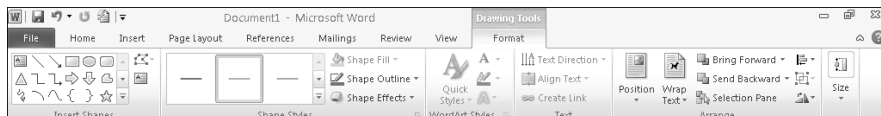
1. Click the Shapes button in the Illustrations group of the Insert tab, and then click the Line button (shown in the margin).
2. Point the cursor to where you want the line to start.
3. Click and drag the cursor to where you want the line to end.
4. Release the mouse button when you reach your destination.

After you draw the shape, the Ribbon displays the Drawing Tools Format tab, as shown in Figure 1-2. You can then use the controls in the Shape Styles group to change the fill, outline, and effects applied to the line.

After you draw a line, you can adjust it by clicking it and then dragging the handles that appear on each end of the line.



**Figure 1-2:**  
Drawing  
Tools  
Format tab.



Remember that you can force a line to be perfectly horizontal or vertical or 45 degrees by holding down the Shift key while you draw. If you hold the Shift key and drag diagonally while you draw the line, the line is constrained to perfect 45-degree angles.

### *Drawing rectangles, squares, ovals, and circles*

To draw a rectangle, follow these steps:



1. On the Insert tab, click the Shapes button (in the Illustrations group), and then click the Rectangle button (shown in the margin).
2. Point the cursor so that one corner of the rectangle is positioned where you want the object to be located.
3. Click and drag to where you want the opposite corner of the rectangle to be positioned.
4. Release the mouse button.

The steps for drawing an oval are the same as the steps for drawing a rectangle except that you click the Oval button rather than the Rectangle button. To draw a square or perfectly round circle, select the Rectangle button or the Oval button, respectively, but hold down the Shift key while you draw.



You can adjust the size or shape of a rectangle or an oval by clicking it and dragging any of its “love handles.”

## *Creating Other Shapes*

Rectangles and ovals aren’t the only two shapes that Word can draw automatically. The Shapes gallery includes many other types of shapes you can draw, such as pentagon and stars and flowchart symbols. (To reach the Shapes gallery, click the Shapes button in the Illustrations group on the Insert tab.)

The Shapes gallery organizes shapes into these categories:

- ◆ **Recently Used Shapes:** The top section of the gallery; it lists the 18 shapes you’ve used most recently. The shapes found in this section change every time you draw a new shape.
- ◆ **Lines:** Straight lines, curved lines, lines with arrowheads, scribbly lines, and free-form shapes that can become polygons, if you want. The free-form shape is useful enough to merit its own section, later in this chapter, “Drawing a Polygon or Free-Form Shape.”

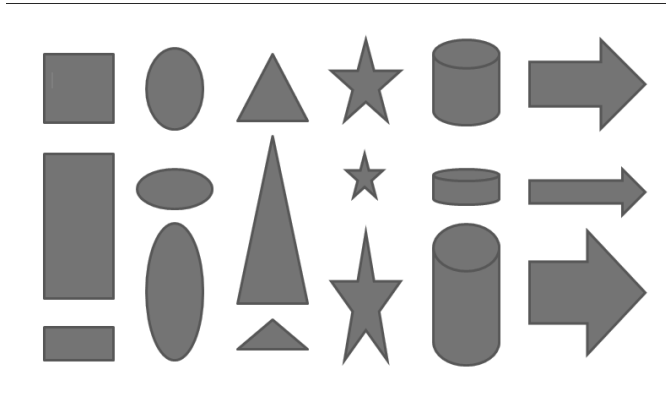
- ◆ **Rectangles:** Various types of roughly rectangular shapes.
- ◆ **Basic Shapes:** Squares, rectangles, triangles, crosses, happy faces, lightning bolts, hearts, clouds, and more.
- ◆ **Block Arrows:** Fat arrows pointing in various directions.
- ◆ **Equation Shapes:** Shapes that look like mathematical symbols such as plus and minus signs.
- ◆ **Flowchart:** Various flowcharting symbols.
- ◆ **Stars and Banners:** Shapes that add sparkle to your presentations.
- ◆ **Callouts:** Text boxes and speech bubbles similar to the ones used in comic strips.

The following steps explain how to draw a shape:

1. **Click the Shapes button in the Illustrations group on the Insert tab.**  
The Shapes gallery appears.
2. **Select the shape you want to insert.**  
The gallery disappears.
3. **Click the page where you want the shape to appear and then drag the shape to the size you want.**  
Hold down the Shift key while drawing the shape to create a regular shape.  
When you release the mouse button, the Shape object takes on the current fill color and line style.
4. **(Optional) Start typing if you want the shape to contain text.**  
After you type some text, you can use the Word formatting features to change its typeface, size, color, and other attributes.

In addition to the standard resizing handles, many shape buttons have one or more extra handles shaped like yellow diamonds; you use this handle to adjust aspects of the object's shape. For example, the block arrows have a handle you can use to increase or decrease the size of the arrowhead. The location of these handles varies depending on the shape you're working with. Figure 1-3 shows how you can use these extra handles to vary the proportions and other aspects of six different shapes. For each of the six shapes, the first object shows how the shape is initially drawn; the other two objects drawn with each shape show how you can change the shape by dragging the extra handle.

**Figure 1-3:**  
Variations  
on basic  
shapes.

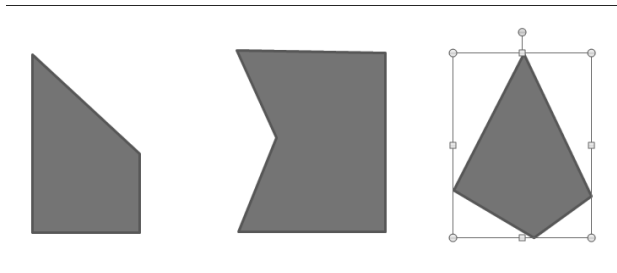


## *Drawing a Polygon or Free-Form Shape*

Mr. Arnold, my seventh grade math teacher, taught me that a *polygon* is a shape that has many sides and has nothing to do with having more than one spouse. (One is certainly enough for most people.) Triangles, squares, and rectangles are polygons, but so are hexagons and pentagons and any unusual shapes whose sides all consist of straight lines. Politicians are continually inventing new polygons when they revise the boundaries of congressional districts.

One of the most useful shapes in the Shapes gallery is the Freeform Shape tool. It's designed to create polygons, with a twist: Not all its sides have to be straight lines. You can use the Freeform Shape tool to build a shape whose sides are a mixture of straight lines and free-form curves. Figure 1-4 shows three examples of shapes I created by using the Freeform Shape tool.

**Figure 1-4:**  
Three  
free-form  
shapes.



Follow these steps to create a polygon or free-form shape:



1. Click the **Shapes** button in the **Illustrations** group on the **Insert** tab to reveal the **Shapes** gallery (refer to Figure 1-1), and then click the **Freeform Shape** tool (shown in the margin).

2. Click where you want to position the first corner of the object.
3. Click where you want to position the second corner of the object.
4. Keep clicking wherever you want to position a corner.
5. (Optional) To draw a free-form side on the shape, hold down the mouse button when you click a corner and then drag to draw the free-form shape. When you reach the end of the free-form side, release the mouse button.

You can then click again to add more corners.

6. To finish the shape, click near the first corner — the one you created in Step 2.






You don't have to be exact: If you click anywhere near the first corner you put down, Word assumes that the shape is finished.

You're finished!

## Flowcharting, 1970s style

I remember when I took my first computer programming class. The year was 1976. I had to buy a plastic template with flowcharting symbols cut into it so that I could learn how to draw proper flowcharts in my COBOL programs.

Word 2010 has flowcharting symbols — a very good thing. Now I can throw away that old plastic template. You never know when you might need one of these symbols, just for old-time's sake:

	Card	Most modern computer users have never even seen one. It was already considered old-fashioned before the first version of Windows was released.
	Delay	Back in the 1970s, computers were so fast that sometimes you had to program in delays so that users wouldn't get spoiled.
	Punched Tape	I once used a computer that worked with punched tape. The paper tape always broke, but I could easily mend it with Scotch tape.
	Summing Junction	This popular TV series was a spinoff from <i>Petticoat Junction</i> .
	Tape	Few PCs have reel-to-reel tape drives. But if you want to see one, tune into the SyFy channel late at night. You can usually spot an old-fashioned reel-to-reel tape drive against the wall in the evil mad scientist's secret lair.



You can reshape a polygon or free-form shape by double-clicking it and then dragging any of the handles that appear on the corners.

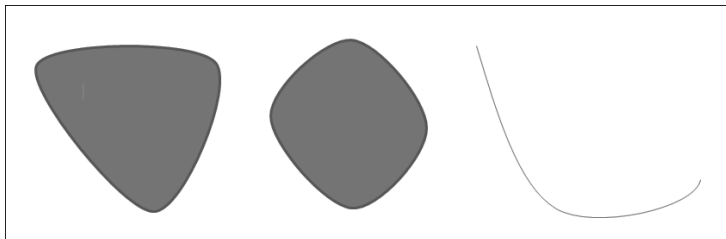
If you hold down the Shift key while you draw a polygon, its sides are constrained to 45-degree angles. (How about a constitutional amendment requiring Congress to use the Shift key when it redraws congressional boundaries?)

You also can use the Freeform Shape tool to draw a multisegmented line, or an *open shape*. To draw an open shape, you can follow the steps in this section, except that you skip Step 6. Instead, double-click or press Esc when you finish.

## *Drawing a Curved Line or Shape*

The useful Curve tool in Word 2010 lets you draw curved lines or shapes. Figure 1-5 shows examples of curved lines and shapes drawn using the Curve tool.

**Figure 1-5:**  
Examples of  
curved lines  
and shapes.



Here's the procedure for drawing a curved line or shape:



- 1. Click Shapes in the Illustrations group on the Insert tab and then choose the Curve tool (shown in the margin).**
- 2. Click where you want the curved line or shape to begin.**
- 3. Click where you want the first turn in the curve to appear.**

The straight line turns to a curved line, bent around the point where you clicked. As you move the mouse, the bend of the curve changes.

- 4. Click to add turns to the curve.**

Each time you click, you add a new bend to the line. Keep clicking until the line is as twisty as you want.

- 5. To finish a line, double-click where you want the end of the curved line to appear. To create a closed shape, double-click over the starting point (created in Step 2).**

## Styling Your Shapes

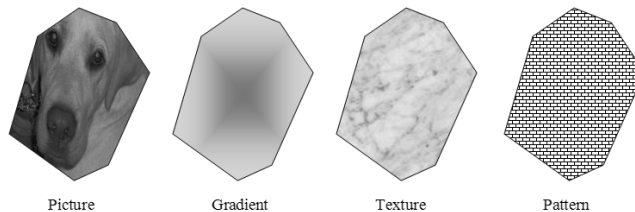
The center section of the Drawing Tools Format tab is named Shape Styles. This tab lets you control various stylistic features of your shapes. For example, you can set a fill color, set the outline, and add effects such as shadows or reflections.

You can set these styles individually or choose a preselected shape style that appears in the Shape Styles group. Note that the styles that appear in the Shape Styles group vary depending on the type of shape you select. For example, if you select a line, various predefined line styles are displayed. But if you select a rectangle, the styles appropriate for rectangles are displayed.

## Setting the Shape Fill

Control how shapes are filled by using the Shape Fill control (in the Shape Styles group of the Drawing Tools Format tab). The simplest type of fill is a solid color. But you can also use a picture, gradient fill, texture, or pattern to fill the shape. Figure 1-6 shows examples of these types of fills, and the following sections explain how to apply them.

**Figure 1-6:**  
Four types  
of fill  
effects.



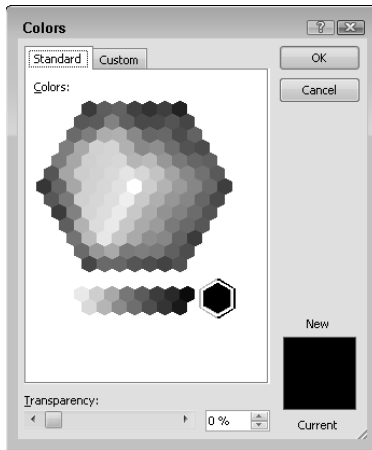
### Filling an object with a solid color

The easiest type of fill is a simple solid color. You can set a solid color by clicking the Shape Fill button and then choosing a color from the palette. The Shape Fill palette includes two groups of colors:

- ◆ **Theme:** Colors that are a part of the current document theme
- ◆ **Standard:** Basic colors such as red, blue, yellow, and green

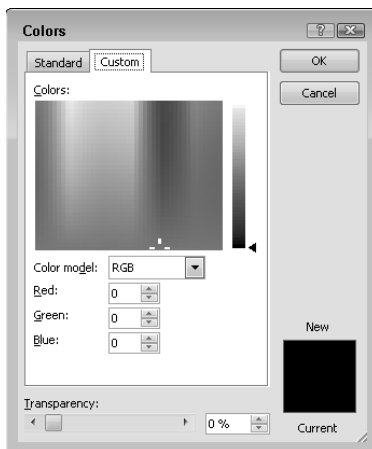
If you want to use a color that isn't visible on the menu, click More Fill Colors; clicking this option displays the Colors dialog box, shown in Figure 1-7, which resembles a tie-dyed version of Chinese checkers. You can choose any color you want from this dialog box.

**Figure 1-7:**  
Choose a  
color.



The Standard tab of the Colors dialog box (refer to Figure 1-7) shows 127 popular colors, plus white and black and shades of gray. If you want to use a color that doesn't appear in the dialog box, click the Custom tab. This step summons the custom color controls, shown in Figure 1-8. You can construct any of the 16 million colors that are theoretically possible with Word. You need a PhD in physics to figure out how to adjust the Red, Green, and Blue controls, though. Experiment, if you want, but be careful: You can create some truly ugly colors if you aren't careful.

**Figure 1-8:**  
Even more  
colors!





## Filling an object with a picture

If you choose Picture from the Shape Fill menu (click the Shape Fill button on the Drawing Tools Format tab on the Ribbon), the Insert Picture dialog box appears, as shown in Figure 1-9. You can use this dialog box to select a picture to be used as a drawing object's fill.



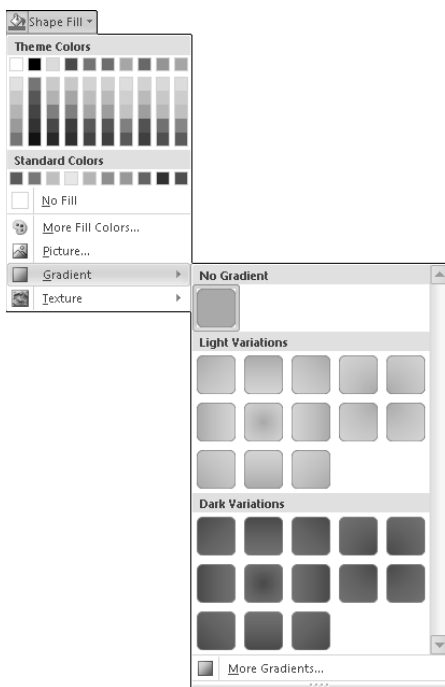
**Figure 1-9:**  
Filling an  
object with  
a picture.

## Making the gradient

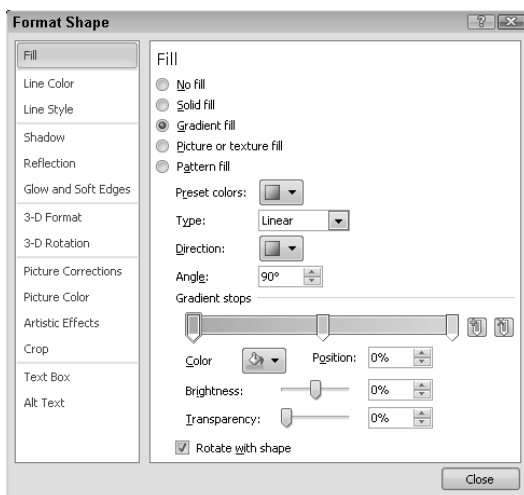
A *gradient fill* is a fill effect that smoothly blends two or more colors. Gradient effects can be subtle or bold, depending on how similar the blended colors are. For example, if you blend a bright shade of yellow into a not-so-bright shade of yellow, the effect is subtle. But if you blend a bright shade of yellow into a bright shade of red, the effect is bold.

To apply a gradient fill, click the Shape Fill button and point to Gradient. This action reveals a gallery of gradient options, shown in Figure 1-10. Then you can select the gradient you want to use.

If none of the gradient fills in the gallery suits your fancy, you can create a custom gradient fill by clicking More Gradients and selecting Gradient Fill. This action summons the dialog box shown in Figure 1-11. You can then customize the gradient fill to your liking. As you can see, you can choose single- or two-color gradients, and you can control the level of transparency and the direction of the gradient.



**Figure 1-10:**  
Creating a  
gradient fill.

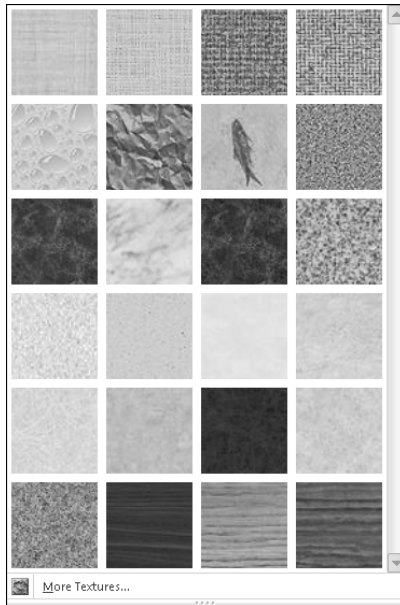


**Figure 1-11:**  
Customizing  
a gradient  
fill.

## Applying a texture

A *texture* is a photo-quality bitmap image designed so that it can be repeated throughout with no noticeable tiling. Textures let you create objects that look like they're made of wood, stone, or parchment, for example.

To apply a texture, click the Shape Fill button and select Texture. The gallery is revealed, as shown in Figure 1-12. Choose one of several textures to give your illustration a polished Formica look.



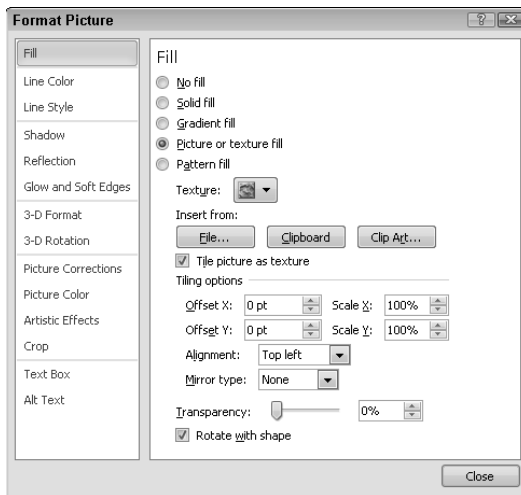
**Figure 1-12:**  
The Formica  
gallery (just  
kidding).

For more texture choices, click the More Textures option at the bottom of the gallery. This brings up the dialog box shown in Figure 1-13. Here you can choose one of the textures provided with Word, or you can click the File button to bring up a dialog box that lets you open an image file of your own to use as a texture.

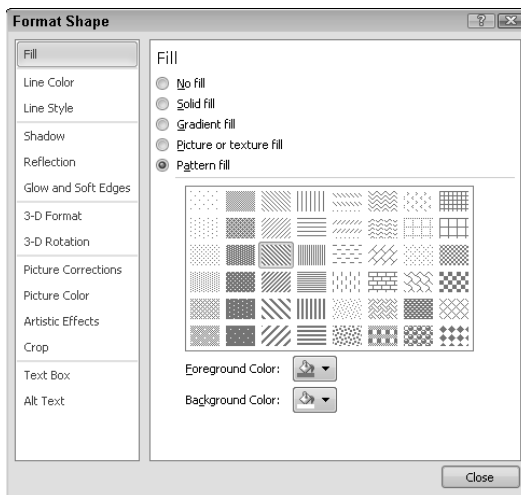
## Using a pattern

If you click the Pattern Fill radio button in the More Textures dialog box, you can select a pattern from the Format Shape dialog box, shown in Figure 1-14. This dialog box lists 48 different patterns and lets you specify your choice of foreground and background colors.

**Figure 1-13:**  
Choosing  
a custom  
texture.



**Figure 1-14:**  
Filling an  
object with  
a pattern.



My personal favorites are the patterns that resemble bricks and cobblestones.

**Note:** You can change the background and foreground colors used to draw the pattern. You can create a nice brick pattern by setting the foreground color to a light gray and the background color to a deep red.

## The problem with patterns

My only beef with Word's pattern fill feature is that you can't control the scale of the pattern. No matter how large or small the object being filled, the pattern always remains the same size. And the patterns are generally too small. In fact, the brick pattern is so small that when you print it, you almost have to use a magnifying glass to see the individual bricks.

Even weirder is that the patterns are all displayed at the same size onscreen regardless

of the zoom factor. For example, if you draw a 1-inch square and fill it with bricks, each row of bricks has about 12 bricks in it. If you zoom in to 200 percent, the bricks don't get bigger. Instead, each row now has 24 bricks. Likewise, if you zoom down to 50 percent, each row now has 6 bricks. When I print the rectangle on my printer, each row has 18 bricks!

## Setting the Shape Outline

Using the Shape Outline control (on the Drawing Tools Format tab), you can change the style of line objects or the border for solid shape objects. You can change these settings for the outline:

- ◆ **Color:** The color used for the outline.
- ◆ **Weight:** The thickness of the line.
- ◆ **Dashes:** The dashing pattern used for the lines that outline the object. The default uses a solid line, but different patterns are available to create dashed lines.
- ◆ **Arrows:** An arrowhead that can appear on either or both ends of a line.

## Applying Shape Effects

The Shape Effects button on the Drawing Tools tab on the Ribbon lets you apply several interesting types of effects to your shapes. When you click this button, a menu with the following effect options is displayed:

- ◆ **Preset:** Lets you select from several popular combinations of shape effects.
- ◆ **Shadow:** Applies a shadow to the picture. You can select one of several predefined shadow effects, or you can call up a dialog box that lets you customize the shadow.

- ◆ **Reflection:** Creates a reflected image of the picture beneath the original picture.
- ◆ **Glow:** Adds a glowing effect around the edges of the picture.
- ◆ **Soft Edges:** Softens the edges of the picture.
- ◆ **Bevel:** Creates a beveled effect.
- ◆ **3-D Rotation:** Rotates the picture in a way that creates a three-dimensional effect.

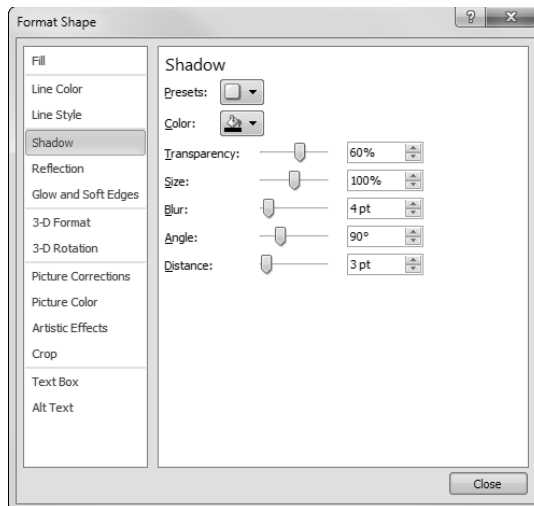


The best way to discover how to use these effects is to experiment with them to see how they work.

## *Applying a shadow*

To apply a shadow effect to an object, select the object, click the Shape Effects button, click Shadow, and then select one of the preset shadow effects that appears in the gallery that is displayed.

If you want more control over the shadow that is applied, you can choose Shadow Options from the bottom of the Shape Effects⇄Shadow menu. This opens the Format Shape dialog box, shown in Figure 1-15. It gives you precise control over such factors as the color, amount of transparency, size, blurriness, angle, distance of the shadow.

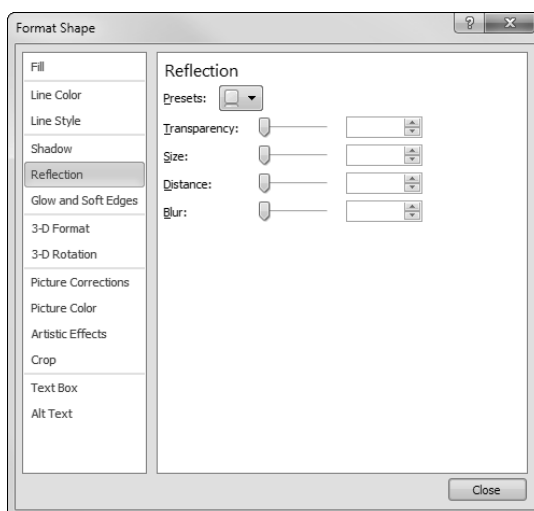


**Figure 1-15:**  
Setting the  
Shadow  
options.

## Applying a reflection

A Reflection effect displays a reflected version of the main shape, creating the impression that the shape is floating above a reflective surface such as glass or water. To apply a reflection to a shape, select the shape, click the Shape Effects button, click Reflection, and then choose one of the preset reflection effects from the gallery.

For more control over the reflection, choose Reflection Options at the bottom of the gallery. This action summons the dialog box shown in Figure 1-16, which lets you adjust the transparency, size, distance, and blur of the reflection.



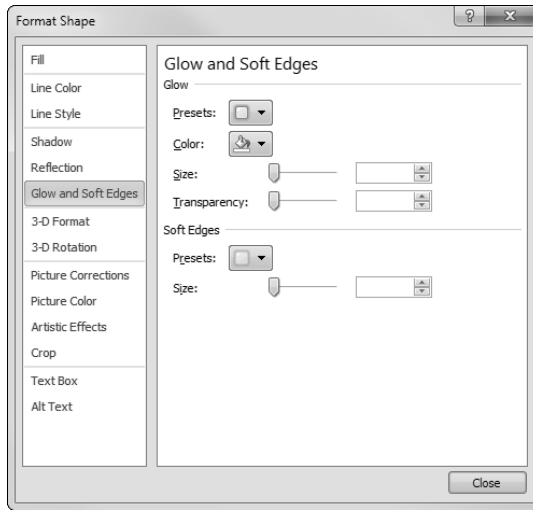
**Figure 1-16:** Setting Reflection options.

## Applying Glow and Soft Edges

The Glow and Soft Edges effects both manipulate the edges of a shape to create a glowing effect or to simply soften the edges. You can apply these effects to a shape by selecting the shape, clicking the Shape Effects button, and then clicking either Glow or Soft Edges and choosing an effect from the gallery that appears.

If you want more exact control over either of these effects, choose Glow Options or Soft Edges Options from the bottom of the gallery to summon the dialog box shown in Figure 1-17. Then you can adjust the factors that create the glowing or softening effect.

**Figure 1-17:**  
Setting  
Glow or  
Soft Edges  
options.



## *Applying a bevel*

The Bevel effect lets you chisel away at the edge of a shape to create an interesting three-dimensional effect. The easiest way to apply a bevel is to select the shape, click the Shape Effects button, click Bevel, and then choose one of the bevel effects from the gallery that appears.

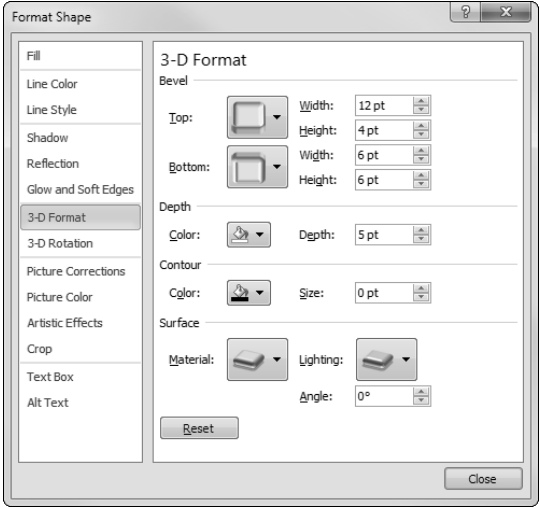
Alternatively, you can choose 3-D Options from the bottom of the gallery to open the dialog box shown in Figure 1-18. From this dialog box, you can control the amount and type of beveling on the top and bottom of the shape, the apparent depth and contour of the bevel, and the type of surface and lighting effects used to create the bevel.

## *Adding 3-D Rotation*

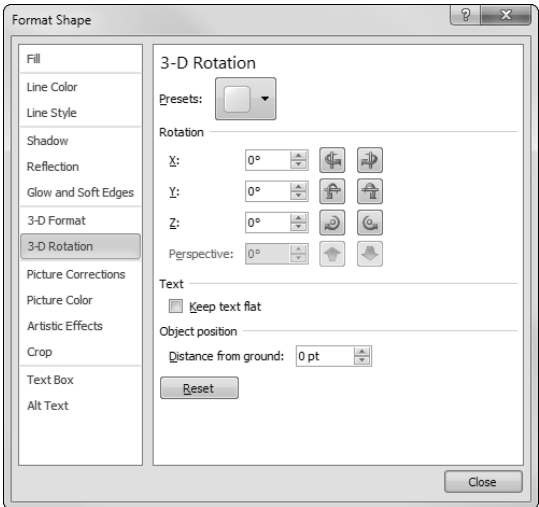
The 3-D Rotation effect lets you spin a shape around as though it were a three-dimensional object. You can apply a preset 3D rotation to an object by choosing one of the options from the gallery that appears when you choose Shape Effects→3-D Rotation. Or, you can choose 3-D Rotation Options from the bottom of the gallery to summon the dialog box shown in Figure 1-19. Then, you can play with the X, Y, Z, and Perspective settings to create an almost endless variety of three-dimensional rotations.



**Figure 1-18:**  
Setting  
3-D Format  
(Bevel)  
options.



**Figure 1-19:**  
Setting 3-D  
Rotation  
options.



## Flipping and Rotating Objects

To *flip* an object means to create a mirror image of it. To *rotate* an object means to turn it from its center. Word lets you flip objects horizontally or vertically, rotate objects in 90-degree increments, or freely rotate an object to any angle.



Rotation works for text boxes and Shape text. Thus, you can use rotation to create vertical text or text skewed to any angle you want. However, flipping an object doesn't affect the object's text.

## *Flipping an object*

Word enables you to flip an object vertically or horizontally to create a mirror image of the object. To flip an object, follow these steps:

1. **Choose the object you want to flip.**
2. **On the Drawing Tools Format tab, click the Rotate button in the Arrange group and then choose Flip Horizontal or Flip Vertical.**

## *Rotating an object 90 degrees*

You can rotate an object in 90-degree increments by following these steps:

1. **Choose the object you want to rotate.**
2. **On the Drawing Tools Format tab, click the Rotate button in the Arrange group, and then choose Rotate Right or Rotate Left.**
3. **To rotate the object 180 degrees, click the appropriate Rotate button again.**

## *Using the rotate handle*

Remember how all the bad guys' hideouts were slanted in the old *Batman* TV show? The rotate handle lets you give your drawings that same kind of slant. Using the rotate handle, you can rotate an object to any arbitrary angle by just dragging it with the mouse.

The green rotate handle appears above the object, connected to the object by a line, as shown in Figure 1-20. You can rotate an object to any arbitrary angle by simply dragging the rotate handle either clockwise or counterclockwise.

The following steps show you how to use the rotate handle:

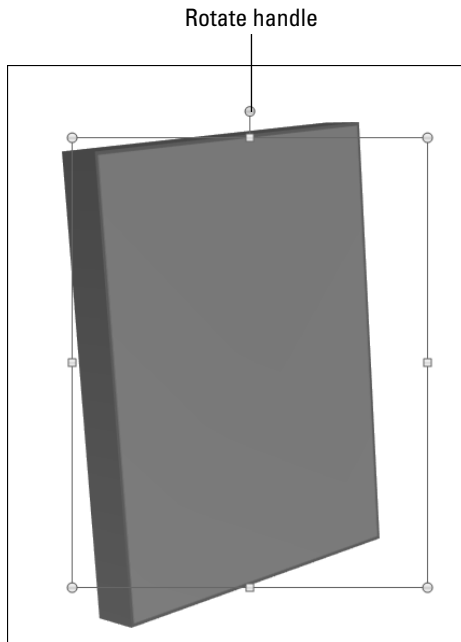
1. **Click the object you want to rotate.**
2. **Drag the rotate handle in the direction you want to rotate the object.**

As you drag, an outline of the object rotates around. When the object's outline is at the angle you want, release the mouse button and the object is redrawn at the new angle.



To restrict the rotation angle to 15-degree increments, hold the Shift key while dragging around the rotate handle.

**Figure 1-20:**  
You use  
the rotate  
handle to  
rotate an  
object.



## Drawing a Complicated Picture

When you add more than one object to a page, you might start having lots of questions: What happens when objects overlap? How do you line up objects so that they don't look like they were thrown at the page from a moving car? And, how do you keep together objects that belong together?

This section shows you how to use Word features to handle overlapped objects and how to align and group objects.

### Changing layers

Whenever you have more than one object on a page, the potential exists for objects to overlap one another. Like most drawing programs, Word handles this problem by *layering* objects like a stack of plates. The first object you draw is at the bottom of the stack, the second object is on top of the first, the third is atop the second, and so on. If two objects overlap, the one that's at the highest layer wins; objects below it are partially covered. So far, so good — unless you don't remember to draw the objects in the correct order. You might draw a shape that you want to tuck behind a shape you've already drawn, or you might want to bring an existing shape to the top of the pecking order. No problem. In Word, you can change the stacking order by moving objects toward the front or back so that they overlap just the way you want.



Word layers aren't nearly as powerful as layers in programs such as Adobe Illustrator or AutoCAD. All they do is set the stacking order when objects are placed on top of one another.

The Drawing Tools Format tab provides two controls that let you move an object forward or backward in the layer order:

- ◆ **Bring Forward:** Moves the chosen object forward in the stack. Note that this button has a down arrow next to it. Click it to reveal a menu with three commands for moving the selected object:
  - *Bring Forward:* One step closer to the top of the heap
  - *Bring to Front:* To the top of the stack
  - *Bring in Front of Text:* In front of any text
- ◆ **Send Backward:** Sends the chosen object back in the stack. Again, this button has a down arrow next to it. Click the arrow to determine where to send the selected object:
  - *Send Backward:* Down one level in the layer order
  - *Send to Back:* To the back of the stack
  - *Send Behind Text:* Behind any text

Layering problems are most obvious when objects have fill colors. If an object has no fill color, objects behind it are allowed to show through. In these cases, the layering doesn't much affect the appearance of the final drawing because the lack of fill allows all objects to be visible.

To bring an object to the top of another, you might have to use the Bring Forward command several times. The reason is that even though the two objects appear to be adjacent, other objects might occupy the layers between them.

### *Line 'em up*

Nothing looks more amateurish than objects dropped randomly on a page with no apparent concern for how they line up with each other. The Drawing Tools Format tab includes the Align button, which opens a menu with these commands on it:

- ◆ Align Left
- ◆ Align Center
- ◆ Align Right
- ◆ Align Top

- ◆ Align Middle
- ◆ Align Bottom
- ◆ Distribute Horizontally
- ◆ Distribute Vertically

The first three commands align items horizontally, and the next three align items vertically. The last two commands distribute the objects evenly either horizontally or vertically. Select the items you want to distribute, click the Align button on the Drawing Tools Format tab, and then choose Distribute Horizontally or Distribute Vertically.

## Using gridlines

To help you create well-ordered pages, Word lets you display a grid of evenly spaced lines over the page. These lines aren't a part of the page, so your audience doesn't see them when you give your presentation. The lines exist simply to make the task of lining things up a bit easier.

To display the grid or change its size, click the Align button on the Drawing Tools Format tab and then choose Grid Settings. The Drawing Grid dialog box, shown in Figure 1-21, is summoned.



**Figure 1-21:**  
The  
Drawing  
Grid dialog  
box.

To activate the grid, select the Snap Objects to Grid When the Gridlines Are Not Displayed check box and then adjust the grid spacing to your satisfaction. If you want to see the grid on the screen, select the Display Gridlines on Screen check box.

### ***Group therapy***

A *group* is a collection of objects that Word treats as though it were one object. Using groups properly is one key to putting together simple shapes to make complex pictures without becoming so frustrated that you have to join a therapy group. (“Hello, my name is Doug, and Word drives me crazy.”)

To create a group, follow these steps:

**1. Choose all objects that you want to include in the group.**

Hold down the Shift key and click each item.

**2. Right-click a selected object and then choose **Group**⇨**Group** from the menu that appears.**

You can also find the Group command on the Drawing Tools Format tab, but it’s much easier to find by right-clicking.

To take apart a group so that Word treats the objects as individuals again, follow these steps:

**1. Right-click the group you want to break up.**

**2. Choose **Group**⇨**Ungroup**.**

In Word, you can create groups of groups. This capability is useful for working with complex pictures because you can work on one part of the picture, group it, and then work on the next part of the picture without worrying about accidentally disturbing the part you already grouped. After you have several such groups, select them and group them. You can create groups of groups of groups, and so on, *ad nauseam*.

# *Chapter 2: Inserting Pictures and Clip Art*

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## *In This Chapter*

- ✓ Using free pictures
- ✓ Finding a picture you like
- ✓ Moving, sizing, cropping, and stretching pictures
- ✓ Adding special effects such as borders, shadows, and reflections
- ✓ Wrapping text around pictures

**F**ace it: Most of us weren't born with even an ounce of artistic ability. Someday (soon, I hope), the genetic researchers combing through the billions of genes strung out on those twisty DNA helixes will discover the Artist Gene. Then, despite protests from the daVincis, van Goghs, and Monets among us (who fear that their NEA grants will be threatened), doctors will splice the little gene into our DNA strands so that we can all be artists. Of course, this procedure won't be without side effects: Some people will develop an insatiable craving for croissants, and others will inexplicably develop French accents and whack off their ears. But artists we shall be.

Until then, we have to rely on clip art or on pictures found on the Internet, scanned into the computer, or taken with a digital camera.

## *Exploring the Many Types of Pictures*

The world is awash with many different picture file formats. Fortunately, Word works with almost all these formats. The following sections describe the two basic types of pictures you can work with in Word: bitmap pictures and vector drawings.

### *Bitmap pictures*

A *bitmap picture* is a collection of small dots that comprise an image. Bitmap pictures are most often used for photographs and for icons and other buttons used on Web pages. You can create your own bitmap pictures with a scanner, a digital camera, or a picture-drawing program such as Adobe Photoshop. You can even create crude bitmap pictures using Microsoft Paint, the free painting program that comes with Windows.

The dots that make up a bitmap picture are *pixels*. The number of pixels in a given picture depends on two factors: the picture's resolution and its size. *Resolution* refers to the number of pixels per inch, measured in *dots per inch (dpi)*. Most computer monitors (and projectors) display 72 dpi in their standard resolutions. At this resolution, a 1-inch-square picture requires 5,184 pixels (72 x 72). A photograph to be printed on an inkjet printer or a laser printer usually has a much higher resolution, usually at least 300 pixels per inch or more. At 300 dpi, a 4-x-6-inch photograph requires more than 2 million pixels.

The amount of color information stored for the picture — also referred to as the picture's *color depth* — affects the number of bytes of computer memory the picture requires. The color depth determines how many different colors the picture can contain. Most pictures have one of two color depths: 256 colors or 16.7 million colors. Most simple charts, diagrams, cartoons, and other types of clip art look fine with 256 colors. Photographs usually use 16.7 million colors.



Pictures with 16.7 million colors are also known as *true-color* pictures, or *24-bit color* pictures. True-color also has a 32-bit color version, but the additional bits aren't used for extra color. Instead, the extra 8 bits (the *alpha channel*) are used for other purposes, such as transparency control.

A typical 4-x-6-inch photograph, which has more than 2 million pixels at 300 dpi, requires about 2MB to store with 256 colors. With true-color, the size of this typical picture jumps to a whopping 6.4MB. Fortunately, bitmap pictures can be compressed to reduce their sizes without noticeably distorting their images. Depending on the contents of the picture, a 6MB picture might be reduced to 250KB or smaller.

Bitmap picture files usually have filename extensions such as *.bmp*, *.gif*, *.jpg*, *.pcx*, or *.png*. Table 2-1 describes the bitmap file formats that Word supports.



I recommend that you use (if you have a choice) JPEG format images for photographs you want to include in Word documents, because JPEG's built-in compression saves hard drive space. (The JPEG compression method loses detail in the image, but the loss isn't usually apparent.)

**Table 2-1**

**Word's Bitmap Picture File Formats**

<i>Format</i>	<i>Type of File It Represents</i>
BMP	Garden-variety Windows bitmap file, used by Windows Paint and many other programs
GIF	Graphics Interchange Format, a format commonly used for small Internet pictures



<i>Format</i>	<i>Type of File It Represents</i>
JPEG	A common photographic format that includes built-in compression; the extension JPG is sometimes used rather than JPEG, and variants of this format use the extensions JFEF and JPE
PCT	Macintosh PICT
PNG	Portable Network Graphics, an image format designed for Internet graphics
TIFF or TIF	Tagged Image Format, another bitmap program most often used for high-quality photographs

### *Victor, give me a vector*

In addition to using bitmap pictures in Word, you can use vector drawings. A *vector drawing* is a picture file that contains a detailed definition of each shape that makes up the image. Vector drawings are usually created by using a high-powered drawing program such as Adobe Illustrator.

Word supports all the most popular vector drawing formats, as described in Table 2-2.

<b>Table 2-2 Word's Vector File Formats</b>	
<i>Format</i>	<i>Type of File It Represents</i>
CDR	CorelDRAW, a popular, upper-crust drawing program
CGM	Computer Graphics Metafiles, a nondenominational file format that has been around since the mid-1980s.
EMF	Enhanced Windows MetaFile, an enhanced version of WMF
EPS	Encapsulated PostScript, used by some high-end drawing programs
WMF	Windows MetaFile, a format that many programs recognize
WPG	WordPerfect, a format popularized by the WordPerfect word-processing program

## *Using Clip Art*

Whether you buy Word by itself or as part of Microsoft Office, you also get a collection of thousands of pictures, sound clips, and motion clips that you can pop directly into your documents.

Word lets you access clip art from a special Clip Art task pane, where you can search for clip art by keyword. The Clip Art task pane helps you easily find just the right picture to embellish your document.

The first time you access the clip art, a dialog box appears, offering to search your entire hard drive and create a catalog of all the pictures it contains. I suggest that you accept this offer so that you can use the Clip Art task pane to access your own picture files in addition to the clip art files that come with Word.



Be prepared to spend a few minutes waiting for this initial search to finish. Now would be a good time to take a walk.

If you don't like the pictures that come with Word, you can scour the Internet for other pictures to use. Beware, though, that copyright restrictions usually apply to pictures you find on the Internet. You can't legally point your browser to an Internet site, download any old picture, and use it in your documents without permission from the picture's copyright owner. For more information about finding clip art pictures on the Internet, see the section "Getting clip art from the Internet," later in this chapter.

## *Inserting Pictures*

The following sections show you how to insert clip art and other types of pictures into your documents.

### *Inserting clip art*

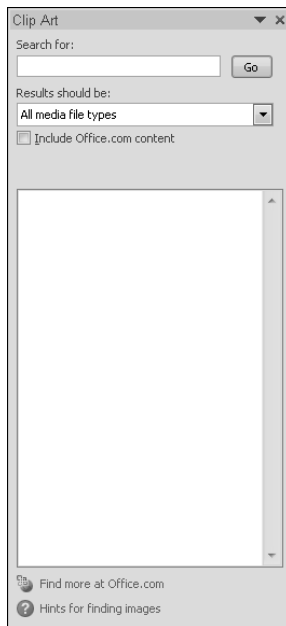
The following steps explain how to drop clip art into your document:

- 1. Move to the page on which you want to plaster the clip art.**
- 2. Click the Insert tab on the Ribbon and then click the Clip Art button in the Illustrations group.**

After a brief moment's hesitation, the Clip Art task pane pops up in all its splendor, as shown in Figure 2-1.

- 3. Type a keyword in the Search For text box and then click the Go button.**

For example, to search for pictures of animals, type **animal** in the Search For text box and then click Go. Word then searches the Clip Organizer to locate clip art that depicts animals, and then it displays, in the Clip Art task pane, thumbnails of the pictures it finds.



**Figure 2-1:**  
The Clip Art  
task pane.

**4. Click the picture you want to use.**

The picture is inserted on the current page, as shown in Figure 2-2. Notice that a special Ribbon Format tab with tools for working with pictures has appeared. This Picture Tools Format tab appears whenever you select a picture object.

**5. If you're finished inserting pictures, click the Clip Art task pane's Close button (the X in the upper-right corner of the task pane).**

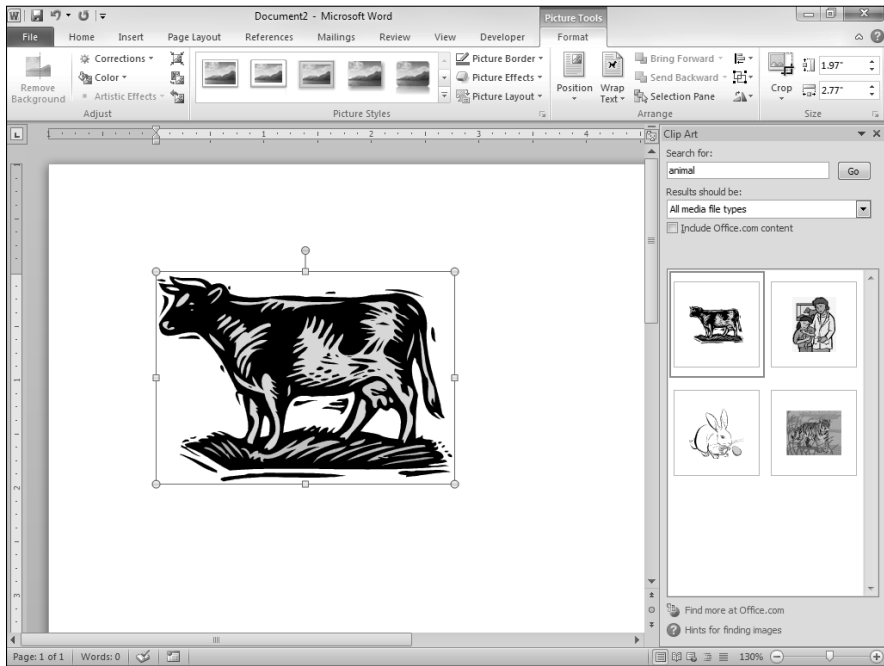
The task pane vanishes.

You probably want to move the picture and change its size. To find out how, see the section "Sizing and stretching a picture," later in this chapter.

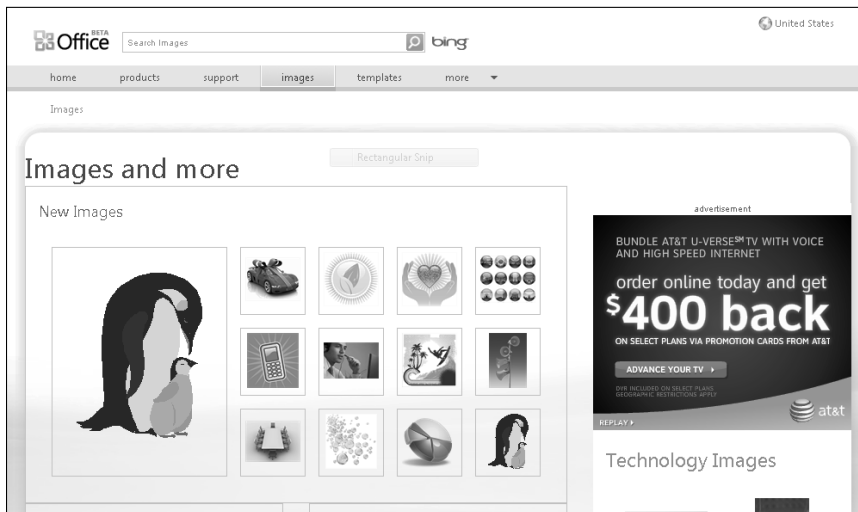
## Getting clip art from the Internet

As though the vast collection of clip art that comes with Office and Word isn't enough, Microsoft also maintains on the Internet a clip art library you can use. Assuming that you have a working Internet connection, you can access this additional clip art library by clicking the Find More at Office.com link at the bottom of the Clip Art task pane. A separate Internet Explorer window opens, which you can then use to search for additional clip art images. See Figure 2-3.

**Figure 2-2:**  
Word  
inserts the  
picture on  
the page.



**Figure 2-3:**  
Getting clip  
art from the  
Internet.



If you find a clip art image you want, you can mark it for later download. Then, after you find all the images you want to download, you can choose an option to download the images directly into Clip Organizer. You can then view the images by using the Clip Art task pane as described earlier in this chapter, in the section “Using Clip Art.”

## Inserting a Picture from a File

If you happen to already have on your computer an image file that you want to insert in a document, Word lets you insert the file. Follow these steps:

1. **Move to the page on which you want to splash a picture.**
2. **Select the Insert tab on the Ribbon and then click the Picture button in the Illustrations group.**

This step summons the Insert Picture dialog box, shown in Figure 2-4.



**Figure 2-4:**  
The Insert  
Picture  
dialog box.

3. **Dig through your hard drive until you find the file you want.**

The picture you want might be anywhere. Fortunately, the Insert Picture dialog box has all the controls you need to search high and low until you find the file.

4. **Click the file and then click Insert.**

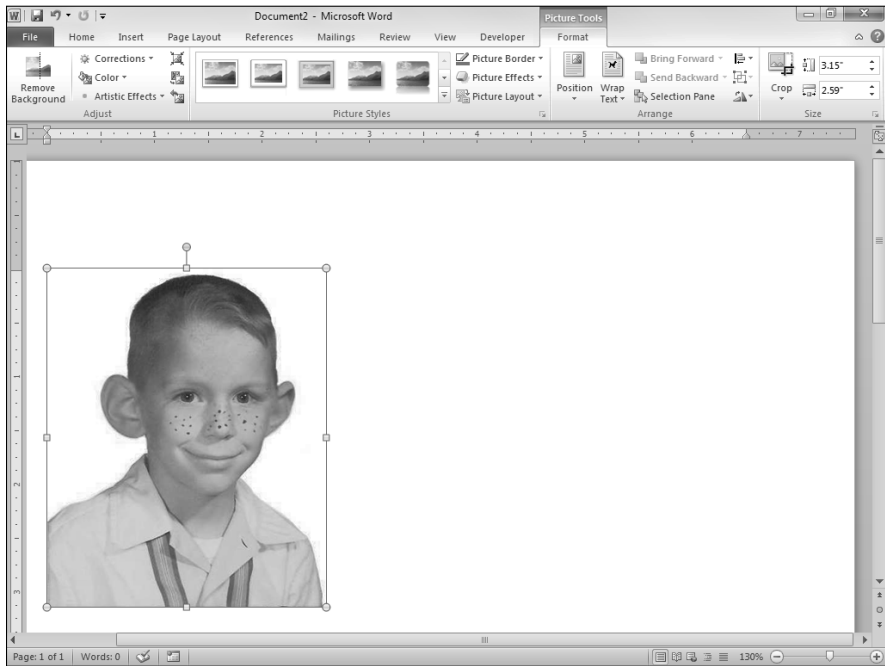
You're done! Figure 2-5 shows how a picture appears when it has been inserted on a page.

As you can see in Figure 2-5, Word scales your pictures so that they fill as much of the page as possible. You need to resize the picture if you want it to be smaller. Just select the picture and then drag a size handle in the corner of the picture.



You also can paste a picture directly into Word by way of the Clipboard. Anything you can copy to the Clipboard, you can paste into Word. For example, you can doodle a sketch in Paintbrush, copy it, and then zap over to Word and paste it. *Voilà* — instant picture!

**Figure 2-5:**  
Making a  
splash with  
pictures.



## *Playing with Your Pictures*

After you transfer a picture into Word, you'll have an irresistible urge to play with it. You'll want to make it bigger, make it smaller, make it taller, make it skinnier, move it here, move it there, make it brighter, make it darker, and so on. With luck, you can play with the picture the entire afternoon and everyone will think that you're working hard.

### *Sizing and stretching a picture*

In most cases, you need to resize your picture after you insert it. To do so, click the picture to select it. Notice the eight handles that appear around it. You can drag any or all of these handles to resize the picture. When you click a corner handle, the proportion of the picture stays the same as you change its size. When you drag an edge handle (top, bottom, left, or right) to change the size of the picture in just one dimension, you distort the picture's outlook as you go.

Stretching a picture by dragging an edge handle can dramatically change a picture's appearance. For example, you can stretch an object vertically to make it look tall and thin or horizontally to make it look short and fat. I usually like to stretch pictures of myself vertically.

### ***Cropping a picture***

Sometimes, you want to cut off the edges of a picture so that you can include just part of the picture in your document. For example, you might have a picture of two people, only one of whom you like. You can use Word's cropping feature to cut off the other person.

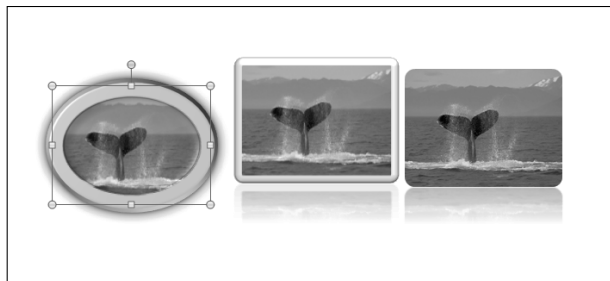
To crop a picture, select the picture and click the Crop button located near the right side of the Picture Tools Format tab on the Ribbon, in the Size group. The selection handles change to special crop marks. You can then drag the crop marks around to cut off part of the picture. When you're satisfied, just click outside the picture.

## ***Adding Style to Your Pictures***

Word helps you draw attention to your pictures by adding stylistic features such as borders, shadows, and reflections. Figure 2-6 shows a page with several copies of a picture, each with a different style applied.

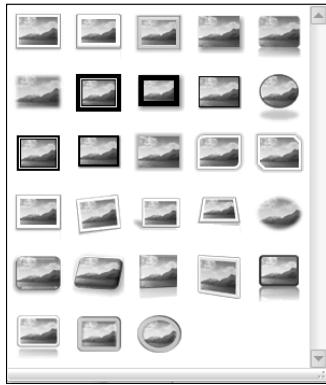
To add a style effect to a picture, select the picture. Word automatically displays the Picture Tools Format tab on the Ribbon. Then simply select the picture style you want to apply in the Picture Styles group.

Word has 28 predefined picture styles, as shown in the gallery in Figure 2-7. This gallery appears in the Picture Styles group on the Picture Tools Format tab. Each style is simply a combination of three types of formatting you can apply to pictures: Border, Effects, and Layout. If you want, you can apply these formats individually as described in the following sections.



**Figure 2-6:**  
Pictures  
with style.

**Figure 2-7:**  
Picture  
styles.



### *Applying a picture border*

You can apply a border to a picture by choosing the Picture Border button in the Picture Styles group on the Picture Tools Format tab. This action reveals the Picture Border menu, which lets you choose the border color, weight (the width of the border lines), and pattern of dashes you want to use.

### *Applying picture effects*

The Picture Effects button in the Picture Styles group on the Picture Tools Format tab lets you apply several interesting types of effects to your pictures. When you click this button, a menu with these effect options is displayed:

- ◆ **Preset:** Lets you choose from several predefined picture effects.
- ◆ **Shadow:** Applies a shadow to the picture. You can select a predefined shadow effect or open a dialog box that lets you customize the shadow.
- ◆ **Reflection:** Creates a reflected image of the picture beneath the original picture.
- ◆ **Glow:** Adds a glowing effect around the edges of the picture.
- ◆ **Soft Edges:** Softens the edges of the picture.
- ◆ **Bevel:** Creates a carved bevel effect around the edge of your picture.
- ◆ **3-D Rotation:** Rotates the picture in a way that creates a three-dimensional effect.



These picture effects work essentially the same way as the Shape Effects, described in Chapter 1 of this minibook. Feel free to see that chapter if you want more information about picture effects.



### *Converting a picture to SmartArt*

Beneath the Picture Effects button in the Picture Styles group is a button named Picture Layout. You can use this button to convert a picture to a SmartArt diagram. For more information about working with SmartArt diagrams, refer to Chapter 3 of this minibook.

### *Adjusting the Color and Such*

The Adjust section of the Picture Tools Format tab includes several additional controls that let you manipulate pictures in fun ways. The Corrections drop-down menu lets you modify the picture in the following manner:

- ◆ **Sharpen and Soften:** Changes the sharpness of the picture
- ◆ **Brightness and Contrast:** Changes the image contrast and brightness settings

The Color drop-down menu lets you change the color of the picture in several ways:

- ◆ **Color Saturation:** Changes the saturation of colors in the picture
- ◆ **Color Tone:** Changes the tone of the colors in the picture
- ◆ **Recolor:** Changes the picture to a different overall color

Use the Artistic Effects drop-down menu to add one or more effects such as chalk, light screen, watercolor, brush, or marker strokes to the picture.

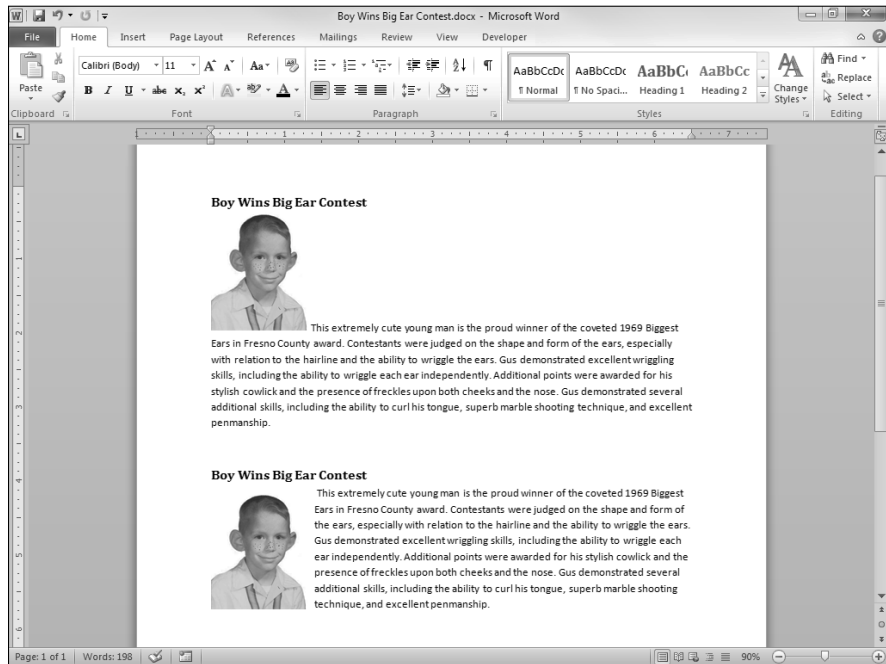
### *Wrapping Text around a Picture*

When you first insert a picture, Word places it in line with the text, just like the figures in this book. Any text that appears before or after the picture lines up with the bottom of the picture; no text appears alongside the picture. For example, have a look at the text in the top half of Figure 2-8: I inserted the picture of the whale in front of the first word of the paragraph.

In many cases, you want the text to wrap around the picture. The text in the bottom half of Figure 2-8 shows one way to do it. Tight wrapping causes the text to hug the picture as tightly as possible. To switch to tight wrapping, select the picture, click the Wrap Text button in the Arrange group on the Picture Tools Format tab, and choose Tight from the menu that appears.

## 256 *Wrapping Text around a Picture*

**Figure 2-8:**  
Wrapping  
text around  
a picture.



The Text Wrapping button includes several options:

- ◆ **In Line with Text:** The default wrapping option, and the one you're least likely to use. It places the picture inline with your text. The height of the line on which the picture appears is adjusted to match the height of the picture. In most cases, this wrapping doesn't look right.
- ◆ **Square:** Wraps the text squarely around the picture.
- ◆ **Tight:** Snuggles the text as closely as possible after Word determines where the edges of the picture are.
- ◆ **Behind Text:** "Spills" text right over the top of the picture, as though the picture weren't even there. The picture appears behind the text.
- ◆ **In Front of Text:** Places the picture on top of the text. The picture might obscure some of the text, so use this option only if that's what you want.
- ◆ **Top and Bottom:** Places text above and below the picture, but doesn't allow any text to appear beside the picture.
- ◆ **Through:** Resembles the Tight option but results in an even tighter fit. If Word finds blank spaces within the picture, it fills the spaces with text.
- ◆ **Edit Wrap Points:** Lets you design your own wrapping shape around your picture by dragging little handles on a wrapping outline.



When you choose Tight wrapping (or any other type of wrapping besides In Line with Text), the picture becomes a free-floating object and is no longer tied to a specific position within the text. You can drag the picture around to any location you want. You can even put it right in the middle of a paragraph, and Word wraps the text around both sides. See Figure 2-9 for an example. Here, I set the wrapping style to Tight, and then I dragged the picture to the middle of the paragraph.

**Figure 2-9:**  
Plopping  
a picture  
into the  
middle of a  
paragraph.

#### Boy Wins Big Ear Contest

This extremely cute young man is the Biggest Ears in Fresno County award. and form of the ears, especially with to wriggle the ears. Gus demonstrated ability to wriggle each ear independently. stylish cowlick and the presence of nose. Gus demonstrated several curl his tongue, superb marble shooting technique, and excellent penmanship.



proud winner of the coveted 1969 Contestants were judged on the shape relation to the hairline and the ability excellent wriggling skills, including the Additional points were awarded for his freckles upon both cheeks and the additional skills, including the ability to



Another concept you need to know about how pictures work in Word is the anchors. An *anchor* is a location in the document's text that's associated with the picture. By default, pictures move with text based on their anchors. For example, if you insert a picture and then back up a bit and type additional text in front of the picture, the picture moves with the text. If that isn't the action you want, right-click the picture and choose Wrap Text➤More Layout Options. Then deselect the Move Object with Text option on the Position tab of the Layout dialog box that appears.



# Chapter 3: Creating Charts and Diagrams

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## *In This Chapter*

- ✓ Adding a chart to your document
- ✓ Getting data from other programs
- ✓ Changing a chart's layout and style
- ✓ Getting smart about SmartArt
- ✓ Creating a diagram or an organization chart

One of the best ways to prove a point is by using numbers, and one of the best ways to present numbers is in a chart. Adding a chart to a Word document is easy. Making the chart look the way you want is usually easy, too. Making charts look the way you want them to may take some pointing and clicking, but the result works and looks great. This chapter shows you how.

In addition to letting you create good old-fashioned charts, Word lets you create special types of diagrams known as SmartArt. I discuss standard charts first in this chapter, and then I dive into a discussion of SmartArt diagrams and organization charts.

## *Understanding Charts*

If you've never attempted to add a chart to a Word document, the process can be a little confusing. A *chart* is simply a series of numbers rendered as a graph. You can supply the numbers yourself or copy them from a separate file, such as an Excel spreadsheet. You can create all kinds of different charts, ranging from simple bar charts and pie charts to exotic doughnut charts and radar charts.

The following list details some terms you have to contend with when you're working with charts:

- ◆ **Chart (or graph):** A bunch of numbers turned into a picture. After all, a picture is worth a thousand numbers. The words *chart* and *graph* are interchangeable.

- ◆ **Microsoft Graph:** A program used in earlier versions of Word (but no longer) to create charts. For more information, read the later sidebar “Whatever happened to Microsoft Graph?”
- ◆ **Chart type:** Word supports several chart types: area, bar, column, doughnut, line, pie, radar, scatter, and others. You can even create cone charts that look like they fell off a fembot in an Austin Powers movie. Different types of charts are better suited to displaying different types of data.
- ◆ **Chart layout:** A predefined combination of chart elements such as headings and legends that you use to easily create a common chart type.
- ◆ **Chart style:** A predefined combination of formatting elements that controls the visual appearance of a chart.
- ◆ **Datasheet:** The origin of the numbers you’re using as chart data. After all, a chart is nothing more than a bunch of numbers made into a picture. Those numbers come from the datasheet. In some earlier versions of Word, the datasheet was a miniature spreadsheet that resembled Excel. In Word 2010, Microsoft gave up on the mini spreadsheet. Now the datasheet is an Excel spreadsheet. Thus, when you create a chart, Word automatically starts Excel (if it isn’t already running) and uses it to hold the numbers in the datasheet.
- ◆ **Series:** A collection of related numbers. For example, a chart of quarterly sales by region might have a series for each region. Each series has four sales totals, one for each quarter. Each series is usually represented by a row on the datasheet, but you can change the datasheet so that each column represents a series. Most chart types can plot more than one series. Pie charts can plot only one series at a time, however. The name of each series can be displayed in a legend.
- ◆ **Axes:** The lines along the edges of a chart:
  - *x-axis:* The line along the bottom of the chart that usually indicates categories
  - *y-axis:* The line along the left edge of the chart that plots data values

Excel automatically provides labels for the x- and y-axes, but you can change them.
- ◆ **Legend:** A box used to identify the various series plotted on a chart. Word can create a legend automatically, if you want.



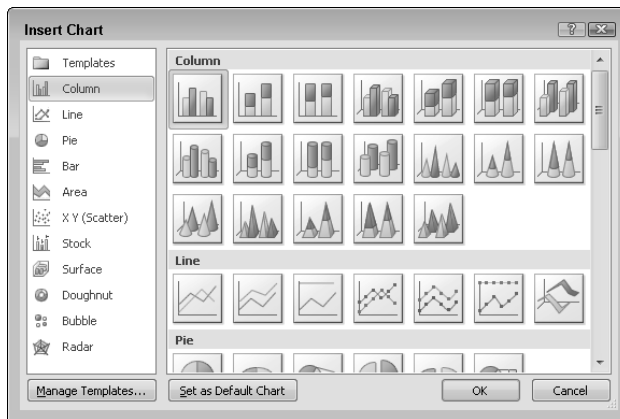
The most interesting facet of charting tools in Word 2010 is their close integration with Excel 2010. When you insert a chart in Word, Excel automatically launches and the data you chart is placed in an Excel workbook. However, the workbook isn’t stored as a separate document. Instead, the chart and the datasheet workbook are stored within the Word document. If you don’t have Excel 2007, don’t worry: You can still create charts in Word. (See the nearby sidebar “Whatever happened to Microsoft Graph?” for more information.)

## Adding a Chart to a Document

The following procedure shows how to insert a chart on a page:

1. Move the insertion point to the spot where you want the chart to appear.
2. Click the Insert tab and then click the Chart button in the Illustrations group.

The Insert Chart dialog box, shown in Figure 3-1, opens.



**Figure 3-1:**  
The Insert  
Chart dialog  
box.

3. Select the type of chart you want to create.

You can select any of these chart types:

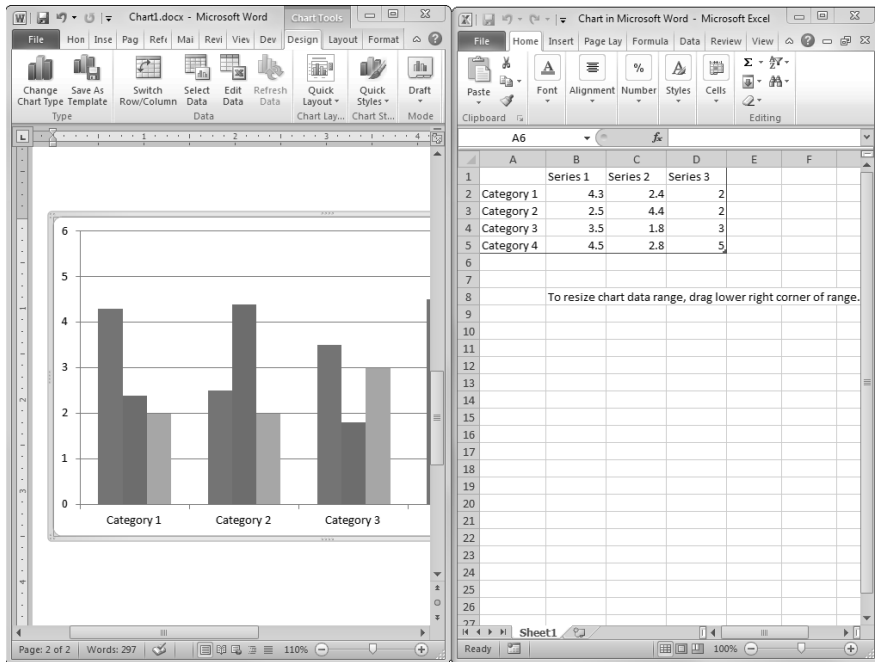
- **Column:** Displays data in vertical columns displayed side by side or stacked. You can pick various column shapes, including simple bars, 3D blocks, cylinders, cones, and pyramids.
- **Line:** Shows data as individual points linked by various types of lines.
- **Pie:** Displayed data as slices in a circular pie.
- **Bar:** Resembles a column chart except that its columns are laid out horizontally rather than vertically.
- **Area:** Resembles a line chart except that areas beneath the lines are shaded.
- **X Y (Scatter):** Plots individual points by using two values to represent the X, Y coordinates.
- **Stock:** Plots high/low/close values.

- **Surface:** Resembles a line chart but represents the data as a three-dimensional surface.
- **Doughnut:** Resembles a pie chart but has a hole in the middle.
- **Bubble:** Resembles a scatter chart but uses a third value to determine bubble size.
- **Radar:** Plots data relative to a central point rather than x- and y-axes.

#### 4. Click OK.

Word whirs and grinds for a moment and then inserts the chart into the page, shown in Figure 3-2. The reason for all the commotion is that in order to insert the chart, Word must determine whether Excel is already running. If it isn't, Word launches Excel and rearranges your screen so that the two programs are displayed side by side, as you can see in the figure.

**Figure 3-2:**  
A chart,  
after it  
has been  
inserted into  
Word.



#### 5. Change the sample data to something more realistic.

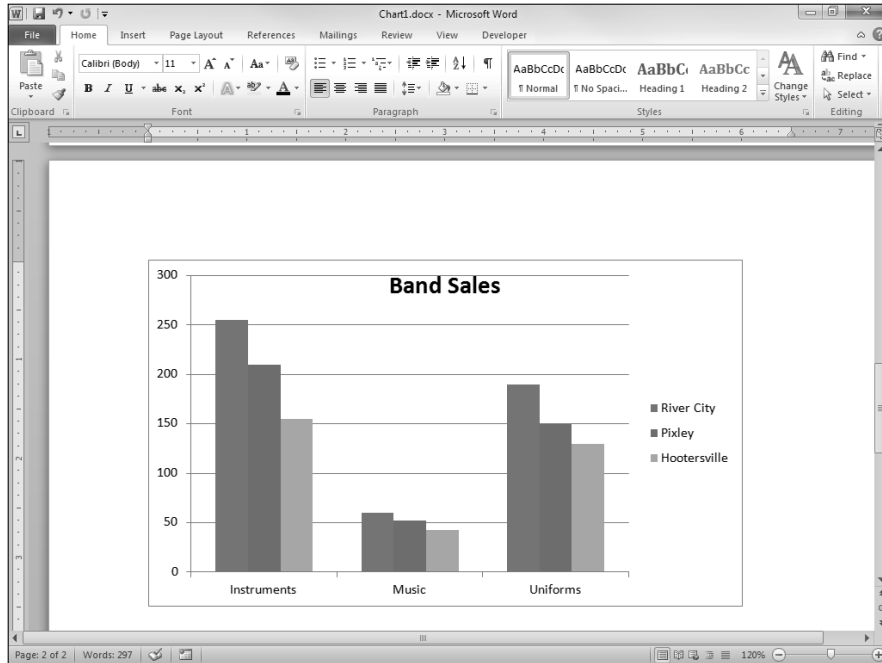
The data for the chart is shown in Excel, tiled alongside Word (refer to Figure 3-2). To find the data you want to chart, you have to change this worksheet. Notice that the chart itself changes to reflect the new data as soon as you return to Word (by clicking anywhere in the Word window).



For more information, see the section “Working with Chart Data,” later in this chapter.

## 6. Customize the chart any way you want.

For example, you can change the chart layout or style, as described later in this chapter. Figure 3-3 shows a finished chart.



**Figure 3-3:**  
A finished  
chart.

## Pasting a Chart from Excel

If the data you want to chart already exists in an Excel workbook, the easiest way to chart it in Word is to first create the chart in Excel. Then copy the chart to the Clipboard, switch over to Word, and paste the chart in the appropriate page. When you do so, the chart appears in Word exactly as it did in Excel.

When you paste an Excel chart into Word, a Paste Options button appears next to the chart. You can click this button to reveal a menu with icons for these choices:

- ◆ **Keep Source Formatting and Embed Workbook:** Maintains all formatting you applied in the original Excel chart. Thus the Word chart looks exactly like the Excel chart.
- ◆ **Use Destination Theme and Embed Workbook:** Reformats the chart according to the document theme used in the Word document. Your finished chart is formatted consistently with the rest of your document.
- ◆ **Use Destination Theme and Link Data:** Copies the chart into the Word document and creates a link to the data in the original Excel workbook. Any changes you make to the data in the original Excel workbook are reflected in the chart (and vice versa). In addition, the chart is translated into the destination Word document's theme.
- ◆ **Keep Source Formatting and Link Data:** Links the Word chart to the data from the Excel sheet and preserves the original formatting of the chart (rather than make it fit in with the Word document).
- ◆ **Picture:** Converts the chart to a collection of Word shape objects with no linkage to the original Excel chart or data.

## *Changing the Chart Type*

In Word, you can create 14 basic types of charts, each of which conveys information with a different emphasis. Sales data plotted in a column chart might emphasize the relative performance of different regions, for example, and the same data plotted as a line chart might emphasize an increase or decrease in sales over time. The type of chart that works best for your data depends on the nature of the data and which aspects of it you want to emphasize.

Fortunately, Word doesn't force you to choose a final chart type immediately. You can easily change the chart type at any time without changing the chart data. These steps show you how:

### **1. Click the chart to select it.**

The Chart Tools contextual tabs appear on the Ribbon, as shown in Figure 3-4.

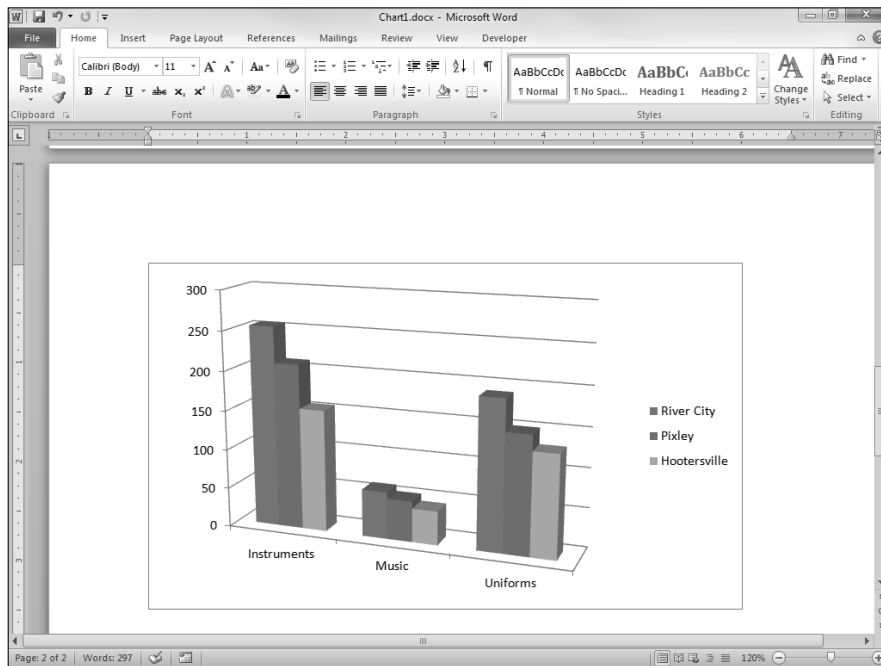
### **2. Click the Chart Tools Design tab and then click the Change Chart Type button in the Type group.**

Word displays a gallery of chart types.

### **3. Click the chart type you want.**

### **4. Click OK and you're done.**

**Figure 3-4:**  
The Chart  
Tools  
contextual  
tabs on the  
Ribbon.



## Working with Chart Data

The data that provides the numbers plotted in a Word chart is stored in an Excel workbook. Depending on how you created the chart, this Excel workbook can be either a separate workbook document or one that's embedded within your Word document. Either way, you work with Excel whenever you want to modify the chart data.

To change the data on which a chart is based, select the chart to display the Chart Tools contextual tabs on the Ribbon. Click the Design tab if it isn't already selected. The Chart Tools Design tab has a group named Data that has four controls you use to perform various tricks on the data, as described in the following sections.

### Switching rows and columns

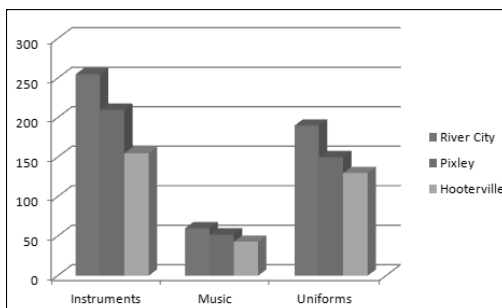
The first control in the Data group is Switch Row/Column. It changes the orientation of your chart in a way that can be difficult to describe but easy to visualize. Refer to the chart shown earlier, in Figure 3-3. The chart is based on the data in this table:

	<i>River City</i>	<i>Pixley</i>	<i>Hooterville</i>
<i>Instruments</i>	255	210	155
<i>Music</i>	60	52	43
<i>Uniforms</i>	190	150	130

As you can see in the figure, rows are used to determine data categories. Thus the chart displays instrument, music, and uniform data along the horizontal axis.

If you click the Switch Row/Column button, the chart changes, as shown in Figure 3-5. Here, the chart categorizes the data by city, so sales for River City, Pixley, and Hooterville are shown along the horizontal axis.

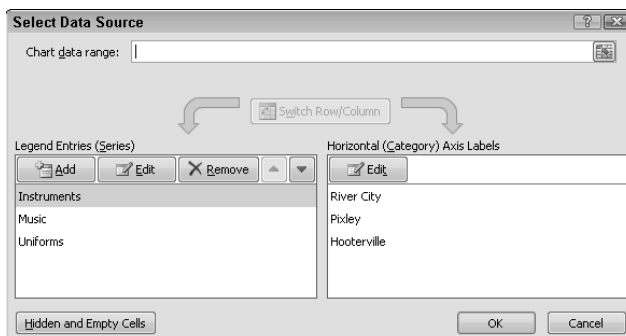
**Figure 3-5:** Swapping the row-and-column orientation.



## *Changing the data selection*

You use the Select Data button in the Data group of the Chart Tools Design tab to change the selection of data on which your chart is based. When you click this button, Excel launches and the Select Data Source dialog box, shown in Figure 3-6, is displayed.

**Figure 3-6:** The Select Data Source dialog box.



You can complete three basic tasks in this dialog box:

- ◆ **Change the range of data used for the chart.** You use the Chart Data Range text box.
- ◆ **Switch rows and columns by clicking the Switch Row/Column button.** This option has the same effect as clicking the Switch Row/Column button on the Ribbon.
- ◆ **Experiment with the individual ranges that contain the data for each series.** You can add a new series, edit the range used for an existing series, delete a series, or change the order in which the series are presented.

### *Editing the source data*

To change the data values on which a chart is based, click the Edit Data button in the Chart Tools Design tab on the Ribbon. Excel launches and displays the chart data. You can then make any changes you want. After you return to Word (by clicking anywhere in the Word window), the chart is updated to reflect your changes.

### *Refreshing a chart*

If a chart is linked to a separate Excel workbook, you can update the chart to reflect any changes that have been made to the underlying data. To do so, follow these steps:

1. **Click the chart to select it.**  
Word adds the Chart Tools tabs to the Ribbon.
2. **Click the Chart Tools Design tab, if it isn't already selected.**  
Refer to Figure 3-4 to see what this tab looks like.
3. **Click the Refresh Data button in the Data group.**

The chart is updated with the data from the underlying Excel workbook.

## *Changing the Chart Layout*

A *chart layout* is a predefined combination of chart elements such as legends and titles. Microsoft studied thousands of charts and talked to chart experts to create galleries of the most common layouts for each chart type. For example, Figure 3-7 shows the Layout gallery for column charts.

**Figure 3-7:**  
The Chart  
Layout  
gallery for  
column  
charts.



To change the layout for a chart, follow these steps:

**1. Click the chart to select it.**

Word adds the Chart Tools tabs to the Ribbon.

**2. If it isn't already selected, click the Chart Tools Design tab on the Ribbon.**

Refer to Figure 3-4 to see what this tab looks like.

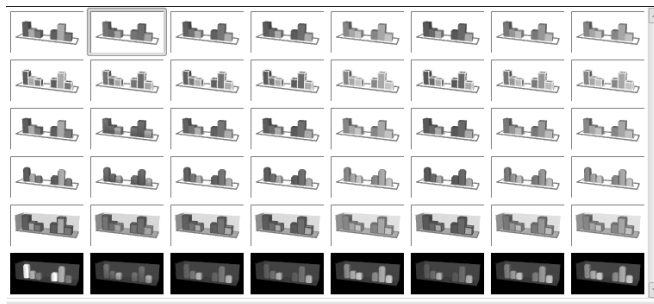
**3. Select the layout you want to use from the Chart Layouts group.**

The Chart Layouts group displays the most commonly used layouts for the chart type. If the layout you want to use isn't visible, you can click the More button (the down arrow in the lower-right corner of the chart layout icons) to display a gallery of available layouts.

## *Changing the Chart Style*

A *chart style* is a predefined combination of formatting elements such as colors and shape effects. Microsoft provides a large assortment of chart styles to choose from. For example, Figure 3-8 shows the Chart Style gallery for column charts.

**Figure 3-8:**  
The Chart  
Style gallery  
for column  
charts.



To change the style for a chart, follow these steps:

1. **Click the chart to select it.**

Word displays the Chart Tools tabs on the Ribbon.

2. **If it isn't already open, click the Chart Tools Design tab on the Ribbon.**

See Figure 3-4 if you need a refresher.

3. **Select the style you want to use from the Chart Styles group.**

The Chart Styles group displays the most commonly used styles for the chart type. If the style you want to use isn't visible in this group, you can click the More button (the down arrow in the lower-right corner of the chart layout icons) to display a gallery of available styles.

## Using the Layout Tab to Embellish Your Chart

You can embellish a chart in Word in many ways: Add titles, labels, legends, and just about anything else. The easiest way to add these elements is by selecting a chart layout, as described in the earlier section “Changing the Chart Layout.” However, you can create your own, unique chart layout by adding these elements individually.

To do it, select the chart and open the Chart Tools Layout tab. Figure 3-9 shows you what this tab looks like.

**Figure 3-9:**  
The Layout  
tab.



### The Insert group

The Insert group on the Layout tab lets you insert a picture, shape, or text box. For more information about working with these elements, see Chapters 1 (shapes), 2 (pictures), and 5 (text boxes) of this minibook.

### The Labels group

You can use the Labels group on the Layout tab to add various types of labels to your chart:

- ◆ **Chart title:** Describes the chart's contents. The title usually appears at the top of the chart, but you can drag it to any location you want.

- ◆ **Axis title:** Describes the meaning of each chart axis. Most charts use two axes titles:
  - Primary horizontal axis
  - Primary vertical axis
- ◆ **Legend:** Identifies the data series that appears in the chart. When you click the Legend button, a menu with several choices for the placement of the legend appears. You can also choose More Legend Options to display the Format Legend dialog box, shown in Figure 3-10. From this dialog box, you can set the position of the legend and control various formatting options for the legend, such as the fill and border style.



**Figure 3-10:**  
The Format  
Legend  
dialog box.

You can create a legend in Word, but you're on your own if you need a myth or fable.

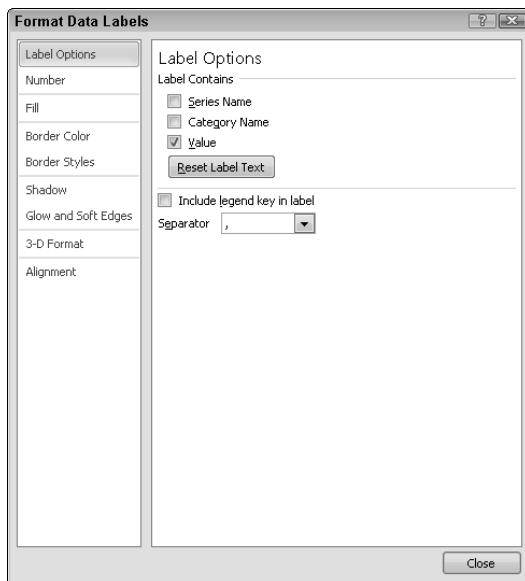
- ◆ **Data label:** Describes the data points on the chart. For maximum control over data labels, choose More Data Label Options to display the Format Data Labels dialog box, shown in Figure 3-11.



For most page types, data labels add unnecessary clutter without adding much useful information. Use labels only if you must back up your chart with exact numbers.

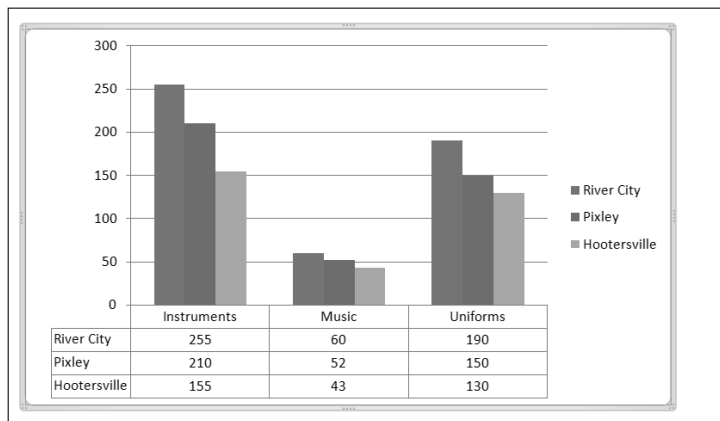


**Figure 3-11:**  
The Format  
Data Labels  
dialog box.



- ◆ **Data table:** Shows the data used to create a chart. Most charts don't include data tables, but you can add one if you believe that your audience will benefit from seeing raw numbers. For example, Figure 3-12 shows a chart with a data table.

**Figure 3-12:**  
A chart with  
a data table.



## The Axes group

The Axes group on the Layout tab includes just two controls:

- ◆ **Axes:** The x- and y-axes on which chart data is plotted. The *x-axis* is the horizontal axis of the chart, and the *y-axis* is the vertical axis. In 3D charts, a third axis (*z*) is also used. You use the Axes control to show or hide the labels used for each chart axis.
- ◆ **Gridlines:** Light lines drawn behind a chart to make it easier to judge the position of each dot, bar, or line plotted by the chart. You can turn gridlines on or off by using the Gridlines button.





## The Background group





The Background group on the Layout tab includes the following useful controls for formatting various parts of the chart background:

- ◆ **Plot area:** Formats the background of the main area of the chart
- ◆ **Chart wall:** Controls the wall format (if your chart format has a wall)
- ◆ **Chart floor:** Controls the floor format (if your chart format has a floor)
- ◆ **3-D Rotation:** Controls the rotation and other aspects of the 3D display (if your chart has a 3D format)

## Understanding SmartArt

The nifty little *SmartArt* feature in Word lets you add several different types of useful diagrams to your document, all of which are described in Table 3-1.

Table 3-1 Diagram Types You Can Create		
<i>Icon</i>	<i>Diagram Type</i>	<i>What Is Shown</i>
 Cycle	Cycle	A process that repeats in a continuous cycle
 Hierarchy	Hierarchy	Hierarchical relationships, such as organization charts
 List	List	A simple list, with information that either has no particular organization or implies a sequential progression, such as steps in a task
 Matrix	Matrix	Four items arranged into quadrants

<i>Icon</i>		<i>Diagram Type</i>	<i>What Is Shown</i>
	Process	Process	A process in which steps flow in a sequential fashion
	Pyramid	Pyramid	Elements building on each other to form a foundation
	Relationship	Relationship	Items' conceptual relationships, including various types of radial and Venn diagrams
	Picture	Picture	SmartArt diagrams that feature pictures in each individual element

The idea behind SmartArt diagrams is to represent bullet lists as a diagram of interconnected shapes. Although many different types of SmartArt diagrams are available, they all work the same way. The only true differences among the various SmartArt diagram types pertain to how they graphically represent the bullets.

For example, the following bullet list represents activities related to my day. Though the list is vague, it structures activities in the order in which they occur, which makes it a rough approximation of the *process* of going to work:

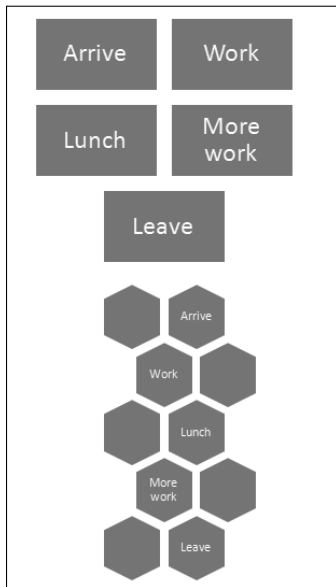
- ◆ Arrive
- ◆ Work
- ◆ Lunch
- ◆ More work
- ◆ Leave

Figure 3-13 shows this list represented by two different types of SmartArt. The only difference between these two SmartArt objects is the type of SmartArt diagram I selected to create them.

Note that many SmartArt diagram types can display two or more outline levels in a bullet list. Suppose that you create this list:

- ◆ Arrive
  - Stop for coffee on the way
  - Try not to be late

**Figure 3-13:**  
Two  
examples  
of SmartArt  
diagrams.

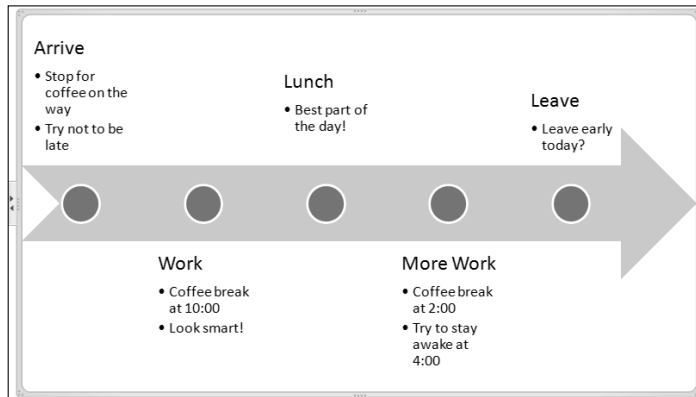


- ◆ Work
  - Coffee break at 10:00
  - Look smart!
- ◆ Lunch
  - Best part of the day!
- ◆ More work
  - Coffee break at 2:00
  - Try to stay awake at 4:00
- ◆ Leave
  - Leave early today?

Figure 3-14 shows how this list appears when formatted as a horizontal process chart. As you can see, second-level bullets are incorporated as text within the diagram.

One of the most useful aspects of SmartArt is that you can easily change from one type of diagram to another. Thus, if you decide that a diagram doesn't convey the message you intend, you can change the diagram type to see whether another type makes the message clear.

**Figure 3-14:** Second-level text displayed in a horizontal process chart.



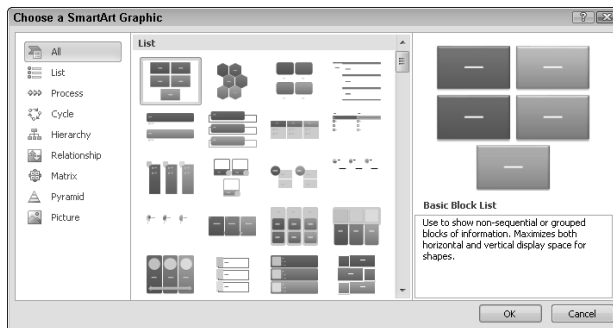
## Creating a SmartArt Diagram

The following steps outline the procedure for creating a SmartArt diagram:

1. Move the insertion point to the spot where you want to create the SmartArt diagram.
2. Click the Insert tab on the Ribbon and then click SmartArt.

This step summons the dialog box shown in Figure 3-15.

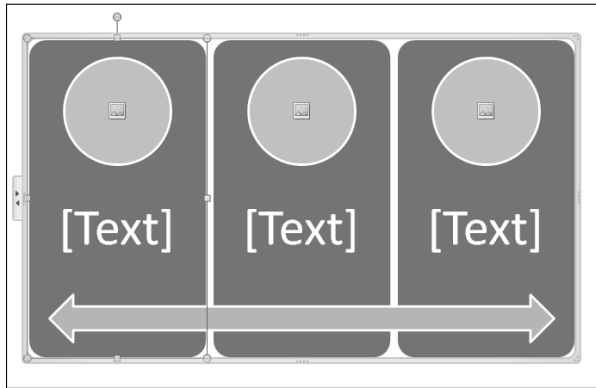
**Figure 3-15:** Creating a SmartArt diagram.



3. Choose the SmartArt diagram type you want to insert.
4. Click OK.

The SmartArt diagram is inserted into the document, as shown in Figure 3-16.

**Figure 3-16:**  
A SmartArt  
diagram  
immediately  
after it  
has been  
inserted.



## 5. Type the bullet list items to use for the diagram.

Use the Text pane provided for this purpose. (If the Text pane isn't visible, click the arrow that appears to the left of the SmartArt diagram. This will summon the Text pane.)

## 6. Modify the diagram however you see fit.

For more information, see the next section.

You're done!

If you're not done because you want to perfect your diagram, you can continue tweaking it until the end of time. But at some point you have to say "Enough is enough."

# *Tweaking a SmartArt Diagram*

After you create a SmartArt diagram, you can adjust its appearance in many ways. The easiest way is to change the SmartArt Style applied to the diagram. A SmartArt Style is simply a collection of formatting elements, such as colors and shape effects, that are assigned to the various elements of a SmartArt diagram.

Microsoft provides a large assortment of SmartArt Styles to choose from. For example, Figure 3-17 shows the SmartArt Styles gallery for pyramid diagrams.

**Figure 3-17:**  
Pyramid  
SmartArt  
styles.



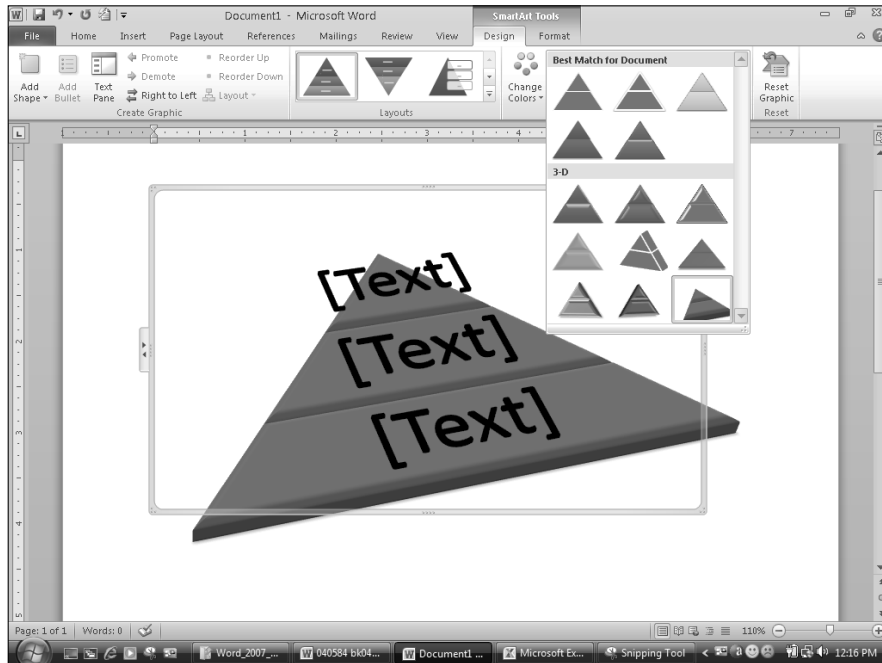
To change the SmartArt for a SmartArt diagram, follow these steps:

**1. Click the diagram to select it.**

Word adds the SmartArt Tools tab to the Ribbon.

Figure 3-18 depicts the SmartArt Tools Design tab.

**Figure 3-18:**  
The  
SmartArt  
Tools  
Design tab.



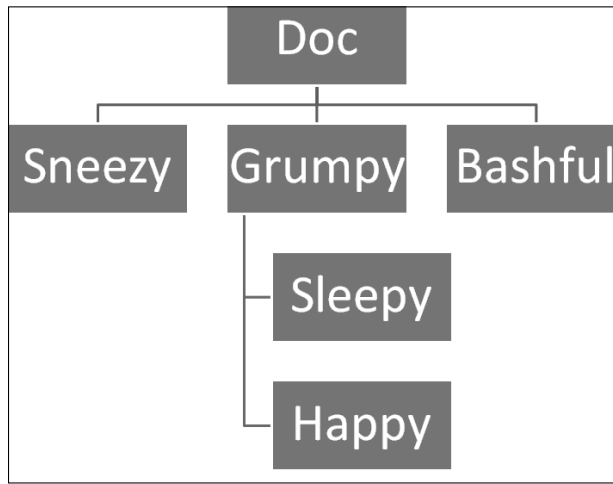
**2. Select the style you want to use from the SmartArt Styles group.**

The SmartArt Styles group, shown in Figure 3-18, displays the most commonly used styles for the diagram type. If the style you want to use isn't visible in this group, click the More button (the down arrow to the lower right of the Quick Style icons) to display a gallery of available styles.

## Working with Organization Charts

An *organization chart* — you know, the box-and-line chart that shows who reports to whom, where the buck stops, and who got the lateral arabesque — is an essential part of many documents.

Hierarchical SmartArt diagrams are ideal for creating organization charts. You can create diagrams that show bosses, subordinates, coworkers, and assistants, and you can easily rearrange the chain of command and add or delete boxes. Figure 3-19 shows a finished organization chart.



**Figure 3-19:**  
A finished  
organization  
chart.

The organization chart shown in the figure is based on this bulleted list:

- ◆ Doc
  - Sneezy
  - Grumpy
    - Sleepy
    - Happy
  - Bashful

Notice that Dopey is missing from this list — he's in a special *Assistant* box on the chart. You find out how to add Assistant boxes later in this chapter.



Organization charts are useful for more than showing employee relationships — you can use this chart type to show any kind of hierarchical structure. For example, back when I wrote computer programs for a living, I used organization charts to plan the programs' structure. This chart type is also useful for recording family genealogies, though it has no way to indicate that Aunt Milly hasn't spoken to Aunt Beatrice in the past 30 years.



Earlier versions of Word used the clumsy program Microsoft Organization Chart to handle organization charts. The new SmartArt feature is easier to use, though it isn't quite as adept at creating complicated charts.

## *Adding a box to a chart*

You can add a box to an organization chart by opening the Text pane and editing the outline text that appears in the Text pane. Alternatively, you can use the controls in the SmartArt Tools on the Ribbon to add boxes. One benefit of using these controls is that you can add an *Assistant*, a box that appears outside the hierarchical chain of command.

To add a box to an organization chart, follow these steps:

- 1. Click the box that you want the new box to be below or next to.**
- 2. In the Create Graphic group on the SmartArt Tools Design tab, click the Add Shape button to reveal a menu of choices. Then select one of these options:**
  - *Add Shape Before:* Inserts a new box at the same level as the selected box, immediately to its left.
  - *Add Shape After:* Inserts a new box at the same level as the selected box, immediately to its right.
  - *Add Shape Above:* Inserts a new box above the selected box.
  - *Add Shape Below:* Inserts a new box beneath the selected box.
  - *Add Assistant:* Inserts a new box beneath the selected box, though the new box is connected by a special elbow connector to indicate that the box is an Assistant and not a subordinate.
- 3. Click the new box and then type whatever text you want to appear in the box.**
- 4. If necessary, drag the box to adjust its location.**

## *Deleting chart boxes*

To delete a box from an organization chart, select the box and press Delete. Word automatically adjusts the chart to compensate for the lost box.

When you delete a box from an organization chart, you should observe a moment of somber silence — or throw a party, depending on whose name was in the box, I suppose.

### ***Changing the organization chart layout***

Choose from these four methods to arrange subordinates in an organization chart branch in Word:

- ◆ **Standard:** Placed at the same level beneath the superior shape
- ◆ **Both:** Placed two per level beneath the superior with the connecting line between them
- ◆ **Left Hanging:** Stacked vertically beneath the superior, to the left of the connecting line
- ◆ **Right Hanging:** Stacked vertically beneath the superior, to the right of the connecting line

You can set up a typical organization chart using all four layouts. For example, the first layer of shapes beneath the top level might use the Standard layout, and beneath the first shape on this layer you could add two shapes using the Both layout. You could then add two more shapes (each one having three subordinate shapes) by using the Left Hanging and Right Hanging layout.

To change the layout of a branch of your chart, first click the shape at the top of the branch and click SmartArt Tools Design tab on the Ribbon. Then click the Layout button in the Create Graphic group and choose a layout type.

# Chapter 4: Working with Tables

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## In This Chapter

- ✓ Setting up and using Word tables
- ✓ Editing table cells, columns, and rows
- ✓ Formatting table cells
- ✓ Using advanced table features

I couldn't figure out what to title this chapter (though "Setting the Table," "Turning the Tables," "Sliding Under the Table," "Dancing on the Table," "Tabling the Motion," "The Periodic Table," and "Table for Two" all came to mind), so I gave up and named it simply "Working with Tables."

This chapter describes the ins and outs of formatting text and graphics into tables. The Word table feature is remarkably versatile, so figuring out how it works pays off.

If you're going to sit at my table, you have to uphold the same table manners I've been trying to teach my kids for years: No talking with your mouth open, and no eating with your mouth full.

## Understanding and Creating Tables

You can think of a *table* as a miniature spreadsheet within a Word document. The table consists of *rows* and *columns*, with a *cell* at every intersection. Each cell can contain text or graphics, and you can format the table in any way you want. Figure 4-1 shows a simple Word table.

**Figure 4-1:**  
A simple  
table.

Survey Results			
Word Feature	Like It	Hate It	What is It?
Mail Merge	20%	50%	30%
Styles	25%	20%	55%
Templates	10%	5%	85%
Columns	35%	30%	35%
Tables	20%	70%	10%

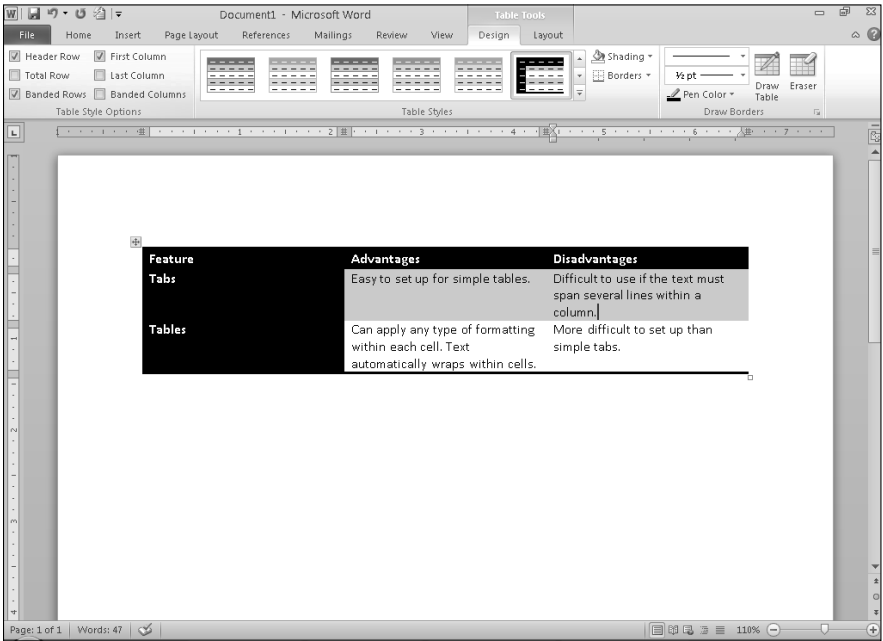
Each table cell can contain one or more paragraph of text, and text automatically wraps within its cell. Whenever text wraps to a new line, Word automatically increases the height of the row, if necessary, to accommodate the

new line of text. Now the versatility of tables becomes apparent. I can create the table shown in Figure 4-1 by using tabs rather than the Table feature; in fact, that method is probably easier. Consider the table shown in Figure 4-2, however. To use tabs to create a table like that one, you have to manually break the lines for each column, using the Tab key to separate columns.

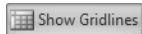
**Figure 4-2:**  
A more complex table.

Feature	Advantages	Disadvantages
Tabs	Easy to set up for simple tables.	Difficult to use if the text must span several lines within a column.
Tables	Can apply any type of formatting within each cell. Text automatically wraps within cells.	More difficult to set up than simple tabs.

Figure 4-3 shows how the table looks in Word when it's being edited. Notice that each table column has its own margins and indentation settings on the Ruler. (The Ruler's indentation indicators are visible only in the column where the insertion point rests; in this example, the third column is selected.)



**Figure 4-3:**  
How a table that's being edited looks in Word.



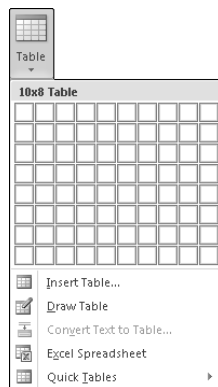
If you don't see gridlines when you work with tables, select the table and then, on the Table Tools Layout tab on the Ribbon, click the View Gridlines option (in the Table group).

A Word table can contain as many as 63 (narrow) columns. The number of rows is unlimited. When you create a table, Word adjusts the size of each column so that the table fits between the left and right margins. Each column is initially set to the same size, but you can adjust the size of individual columns later, and you can adjust the width of the entire table.

The following sections describe several methods for creating tables.

### *Creating a table by using the Table button*

The Table button, which resides on the Insert tab, is the fastest way to create a simple table. When you click this button, a drop-down grid appears, as shown in Figure 4-4. Drag the mouse down and across the grid until the correct number of columns and rows is selected and then release the mouse button to create the table at the insertion point. (Naturally, you must first place the insertion point where you want the table inserted.)



**Figure 4-4:**  
Using  
the Table  
button.

### *Using the Insert Table command*

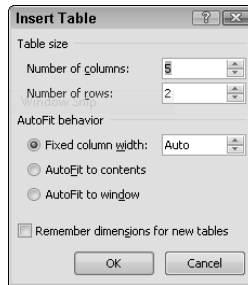
If you prefer the dialog box approach to creating a table, you can use the Insert Table command instead. Using this command, you pick an arbitrary number of rows and columns for your table. (The Table button is limited to eight rows and ten columns.)

Follow these steps to create a formatted table by using the Insert Table command:

1. **Position the insertion point where you want to insert the new table.**
2. **Select the Insert tab, click the Table button in the Tables group, and then choose the Insert Table command.**

The Insert Table dialog box appears, as shown in Figure 4-5.

**Figure 4-5:**  
The Insert  
Table dialog  
box.



3. **Adjust the Number of Columns and Number of Rows fields to specify the number of rows and columns you want to create.**

If you create the same type of table regularly, select the Remember Dimensions for New Tables check box.

4. **Click OK to insert the table.**

## ***Drawing a table***

You can use a simple set of tools in the Draw Table command to draw complicated tables onscreen. This command is ideal for creating tables that are, rather than just simple grids of rows and columns, complex conglomerations in which some cells span more than one row and other cells span more than one column.

To create a table by using the Draw Table tool, follow this procedure:

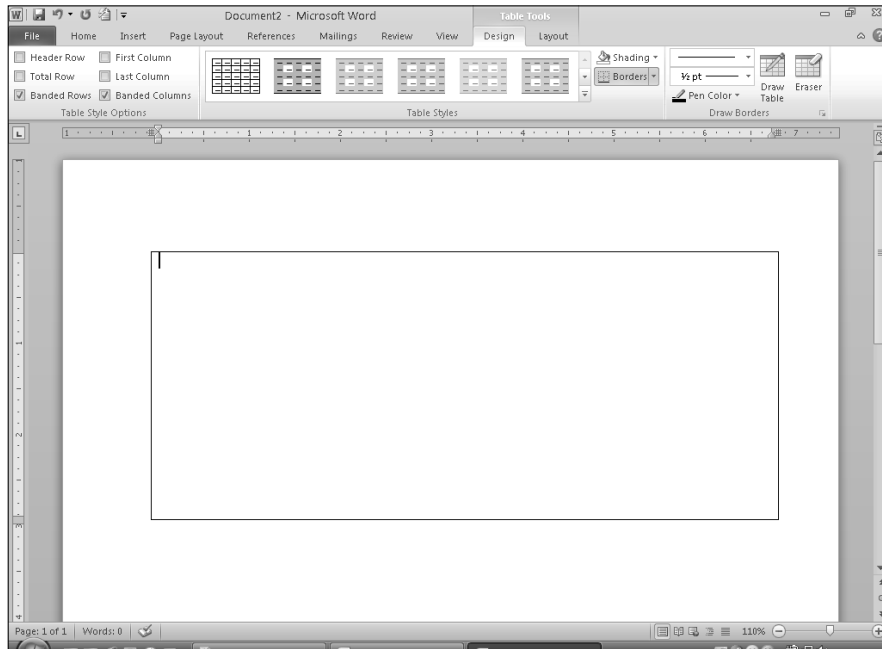
1. **Select the Insert tab, click the Table button in the Tables group, and then choose the Draw Table command.**

The cursor changes to a small pencil shape.

2. **Draw the overall shape of the table by dragging the pencil pointer diagonally to create a rectangular boundary.**

When you release the mouse button, a table consisting of a single cell is created, as shown in Figure 4-6. In addition, the Ribbon displays the Table Tools Design tab.

**Figure 4-6:**  
First draw  
a rectangle  
as the table  
outline.



### 3. “Carve” the table into smaller cells.

For example, to split the table into two rows, point the cursor somewhere along the left edge of the table and then click and drag a line across the table to the right edge. When you release the mouse button, the table splits into two rows.

You can continue to carve the table into increasingly smaller cells. For each slice, point the cursor at one edge of the cell where you want the new cell to begin and then click and drag to the other edge.

### 4. If you want to change the line size or style that’s drawn for a particular segment, use the Line Style and Line Weight drop-down controls in the Draw Borders group on the Table Tools Design tab.

You can change the style of a line you’ve already drawn by tracing over the line with a new style.



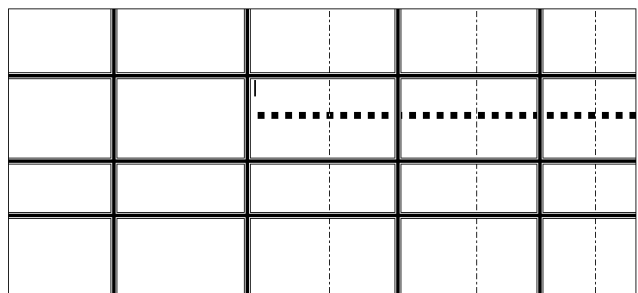
### 5. If you make a mistake while drawing a table cell, click the Eraser button (shown in the margin) and erase the line segment.

Click the Draw Table button if you want to draw additional segments after using the Eraser tool.

### 6. When you’re done, click anywhere outside the table.










Figure 4-7 shows a table carved into several cells, with various types of line styles and line weights.

**Figure 4-7:**  
A mishmash  
of line styles  
and line  
weights in a  
table.



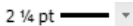



## Using the Table Tools Tabs


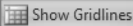








When you work with tables, two tabs appear on the Table Tools context menu: Design and Layout. You find out how to use many of the tools on these tabs later in this chapter. Tables 4-1 and 4-2 helpfully summarize the controls you can find on these tabs.

Table 4-1		The Design Tab
Control	Name	What It Does
 Header Row	Header Row	Applies different formatting to first row of table
 Total Row	Total Row	Applies different formatting to last row of table
 Banded Rows	Banded Rows	Alternates row shading
 First Column	First Column	Applies different formatting to first column of table
 Last Column	Last Column	Applies different formatting to last column of table
 Banded Columns	Banded Columns	Alternates column shading
 Shading ▾	Shading	Applies table shading
 Borders ▾	Borders	Applies table borders
 Draw Table	Draw Table	Draws table outline and then line segments to create new cells within table







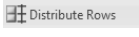











<i>Control</i>	<i>Name</i>	<i>What It Does</i>
 Eraser	Eraser	Erases line segments to remove cells from table
	Line Style	Sets line style for line segments drawn with Draw Table tool
 2 1/4 pt	Line Weight	Sets width of line segments drawn with Draw Table tool
 Pen Color	Pen Color	Sets color of line segments drawn with Draw Table tool



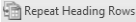
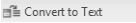

**Table 4-2**
**The Layout Tab**

<i>Control</i>	<i>Name</i>	<i>What It Does</i>
 Select	Select	Drop-down control; lets you select table cells, rows, or even entire tables
 Show Gridlines	View Gridlines	Shows or hides table gridlines
 Properties	Properties	Displays Table Properties dialog box
 Delete	Delete	Delete rows, columns, cells, or entire tables
 Insert Above	Insert Above	Inserts row above selection
 Insert Below	Insert Below	Inserts row below selection
 Insert Left	Insert Left	Inserts column to left of selection
 Insert Right	Insert Right	Inserts column to right of selection
 Merge Cells	Merge Cells	Merges selected adjacent cells to create one large cell
 Split Cells	Split Cells	Splits merged cell into separate cells

(continued)

**Table 4-2 (continued)**

<i>Control</i>	<i>Name</i>	<i>What It Does</i>
 Split Table	Split Table	Splits table into two tables
 AutoFit	AutoFit	Adjusts table layout to fit page
 Height 0.1"	Height	Sets row height
 Width 2.05"	Width	Sets column width
 Distribute Rows	Distribute Rows	Adjusts height of selected rows to distribute rows evenly
 Distribute Columns	Distribute Columns	Adjusts width of selected columns to distribute columns evenly
	Align Top Left	Sets Top vertical alignment and Left horizontal alignment
	Align Top Center	Sets Top vertical alignment and Center horizontal alignment
	Align Top Right	Sets Top vertical alignment and Right horizontal alignment
	Align Center Left	Sets Center vertical alignment and Left horizontal alignment
	Align Center	Sets Center vertical and horizontal alignment
	Align Center Right	Sets Center vertical alignment and Right horizontal alignment
	Align Bottom Left	Sets Bottom vertical alignment and Left horizontal alignment
	Align Bottom Center	Sets Bottom vertical alignment to Center horizontal alignment
	Align Bottom Right	Sets Bottom vertical alignment and Right horizontal alignment
 Text Direction	Text Direction	Changes direction of text in cell

<i>Control</i>	<i>Name</i>	<i>What It Does</i>
 Cell Margins	Cell Margins	Sets margins for individual cells
 Sort	Sort	Sorts selected cells
 Repeat Heading Rows	Repeat Header Rows	Repeats header rows when table spans multiple pages
 Convert to Text	Convert to Text	Converts table to text
 Formula	Formula	Enters calculated formula

## Editing Tables

After you create a table, you may discover that you need to make a few changes. Don't just delete the whole table and start from scratch. As the following sections describe, you can follow a few procedures to perform basic table-editing tasks. Find out how to select cells, add and delete rows and columns, and change column widths.



As you experiment with tables in your Word documents, don't forget to do a little right-clicking. Just about everything you can do to a table cell is accessible from the shortcut menu that appears when you right-click the cell. Different combinations of commands appear depending on whether you select a single cell, a range of cells including an entire column or row, or an entire table.

### Moving and selecting in tables

You can move from cell to cell in a table by using any keyboard shortcut listed in Table 4-3.

<b>Table 4-3 Table-Navigation Keyboard Shortcuts</b>	
<i>To Move to This Cell</i>	<i>Use This Keyboard Shortcut</i>
Next cell in row	Tab
Previous cell in row	Shift+Tab
First cell in row	Alt+Home
First cell in column	Alt+PgUp

(continued)

**Table 4-3 (continued)**

<i>To Move to This Cell</i>	<i>Use This Keyboard Shortcut</i>
Last cell in row	Alt+End
Last cell in column	Alt+PgDn
Previous row	Up arrow
Next row	Down arrow

You can combine the Shift key with a keyboard shortcut listed in Table 4-3 to extend a selection over a range of cells. In addition, you can select the entire table by placing the insertion point anywhere in the table and pressing Alt+Numeric 5 (the 5 on the numeric keypad, not the 5 key on the row that runs across the top of the keyboard).

You can also select various portions of a table by using the mouse actions listed in Table 4-4.

**Table 4-4      Mouse Actions for Selecting Cells in a Table**

<i>To Select This</i>	<i>Use This Mouse Action</i>
A single cell	Move the cursor over the left edge of the cell until the cursor becomes a right-pointing arrow, and then click.
An entire row	Move the cursor just past the left edge of the leftmost cell in the row until the cursor changes to a right-pointing arrow, and then click.
An entire column	Move the cursor just above the topmost cell in the row until the cursor changes to a down-pointing arrow, and then click.
A range of cells	Drag the cursor across the rectangular area of cells you want to select.
The entire table	Click the icon that appears just outside of the top-left corner of the table.

## ***Adding rows and columns***

To add a new row or column to a table, you can use one of the Insert commands on the Table Tools Layout tab.

To add new rows to a table, follow one of these procedures:

- ◆ **To insert a new row within the body of a table**, place the cursor inside the row adjacent to the cell where you want to insert the new row. Then click either Insert Above or Insert Below in the Rows & Columns group. The new row is inserted above or below the selected row.
- ◆ **To insert multiple rows**, select the number of rows you want to insert and then choose Insert Above or Insert Below in the Rows & Columns group.
- ◆ **To insert a new row at the bottom of the table**, move the insertion point to the last cell in the last row of the table and press the Tab key.

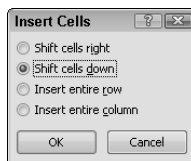
To add new columns to a table, follow one of these procedures:

- ◆ **To insert a new column within the body of the table**, click anywhere in the column where you want to insert the new column and choose either Insert Left or Insert Right in the Rows & Columns group. The new column is inserted to the left or right of the selected column.
- ◆ **To insert several columns**, select the number of columns you want to insert and choose either Insert Left or Insert Right in the Rows & Columns group.

## Inserting cells

You can insert individual cells within a Word table. Start by highlighting the cell or cells where you want to insert the new cells. Then click the dialog box launcher that appears in the lower-right corner of the Rows & Columns group on the Table Tools Layout tab. The Insert Cells dialog box appears, as shown in Figure 4-8.

**Figure 4-8:**  
Inserting  
cells.



If you want to add new cells above selected cells and shift down unselected cells in the same rows, select the Shift Cells Down option. If you want to insert the new cells to the left of the selected cells, with extra cells added to the affected rows, select the Shift Cells Right option. Then click OK.

## Deleting cells

If you want to delete the contents of one or more cells, you can start by selecting the cells and pressing Delete. Unfortunately, even though the contents of the cells are deleted, the cells themselves remain in place. This result may not be what you want.

To remove one or more rows or columns from the table, select the rows or columns you want to delete and click the Delete button on the Table Tools Layout tab. This action reveals a menu with these choices:

- ◆ Delete Cells
- ◆ Delete Columns
- ◆ Delete Rows
- ◆ Delete Table

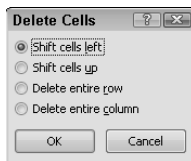
To remove a range of cells in the table, follow these steps:

1. **Select the cells you want to remove.**
2. **Click the Delete button on the Layout tab on the Table Tools context menu and choose Delete Cells from the menu that appears.**



The Delete Cells dialog box appears, as shown in Figure 4-9.

**Figure 4-9:**  
The Delete  
Cells dialog  
box.



3. **Select whether you want to shift the surrounding cells up or to the left to fill the void left by the deleted cells or to just delete entire rows or columns.**
4. **Click OK.**

## *Adjusting column width*

When Word creates a table, it initially makes each column the same width. Having equal columns isn't appropriate for many tables, however, because the data in each column is rarely uniform in size. For example, the first column of a table might contain the names of famous composers, and the second column might list their three most famous concertos. Obviously, the second column is wider than the first.

Fortunately, Word doesn't impose uniform column widths. You can manually adjust the width of each column individually or let Word adjust the width of each column automatically based on the contents of the column.

To adjust the width of an individual column manually, you have a few options:

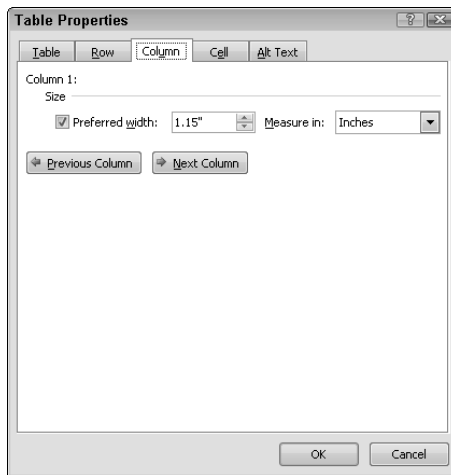
- ◆ **Drag the gridline to the right of the column to increase or decrease the column width.** Grabbing the gridline so that you can move it is a little tricky, but if you hold the mouse cursor directly over the line, the cursor changes into a double-beam thingy indicating that you've grabbed the gridline.
- ◆ **Drag the column marker that appears on the Ruler.**

Either way, the widths of the columns to the right of the one you adjust automatically adjust so that the width of the entire table remains the same.



If you hold down the Alt key while adjusting column width, the width of each column is shown on the Ruler, to help you more precisely size the columns. (If the Ruler isn't visible, you can display it by selecting the Ruler check box in the Show group on the View tab.)

- ◆ **Click the Properties button on the Layout tab to open the Table Properties dialog box.** Then click the Column tab, shown in Figure 4-10.



**Figure 4-10:** Setting the column width with the Table Properties dialog box.

From this dialog box, you can set the width of every column to a precise measurement. The Table Properties dialog box shows the column width for one column at a time. Use the Previous Column and Next Column buttons to move from column to column.

## Using the AutoFit command



The AutoFit command, which lives near the middle of the Layout tab, automatically adjusts the size of a table's columns and rows so that you don't have to mess with each column and row separately. The AutoFit command has three variations:

- ◆ **AutoFit Contents:** Adjusts the size of the cells based on their contents
- ◆ **AutoFit Window:** Resizes tables on Web pages so that they fit in the browser window
- ◆ **Fixed Column Width:** Prevents the table from resizing itself as you type text in cells

## *Using Tabs in a Table*

You can set tab stops for individual cells or a range of table cells. Tabs in tables work much the way they do outside of tables, with two important exceptions:

- ◆ **To insert a tab character into a cell,** you must press Ctrl+Tab. Simply pressing the Tab key moves the cursor to the next cell without inserting a tab.
- ◆ **If you add a decimal tab to a table cell,** the text in the cell aligns automatically over the decimal tab. (A *decimal tab* aligns numbers on the decimal point.) You don't have to press Ctrl+Tab to move the data to the tab stop.

## *Using Table Styles*

You can apply many different formatting elements to tables. The easiest way to format a table is to assign a predefined style that appears on the Table Tools Design tab. Several predefined styles appear directly on the Design tab. You can display the entire gallery by clicking the More button (the down arrow near the lower-right corner of the Table Styles group). See Figure 4-11.

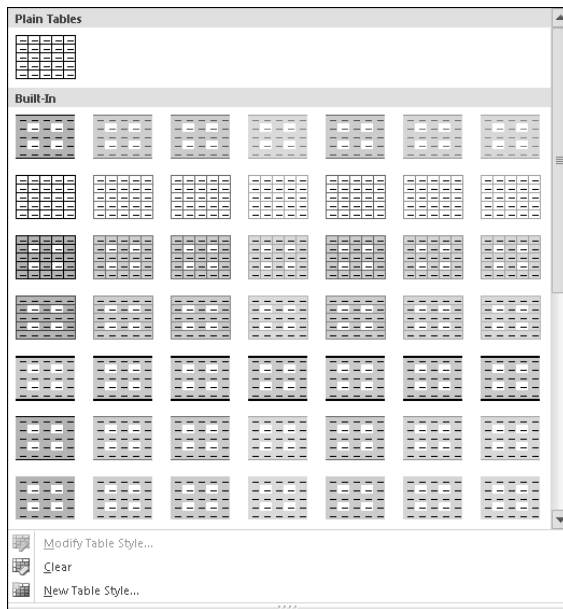
The six check boxes on the left of the Table Tools Design tab govern which aspects of the table the style formatting is applied to. The options are

- ◆ Header Row
- ◆ Total Row
- ◆ First Column
- ◆ Last Column
- ◆ Banded Columns
- ◆ Banded Rows

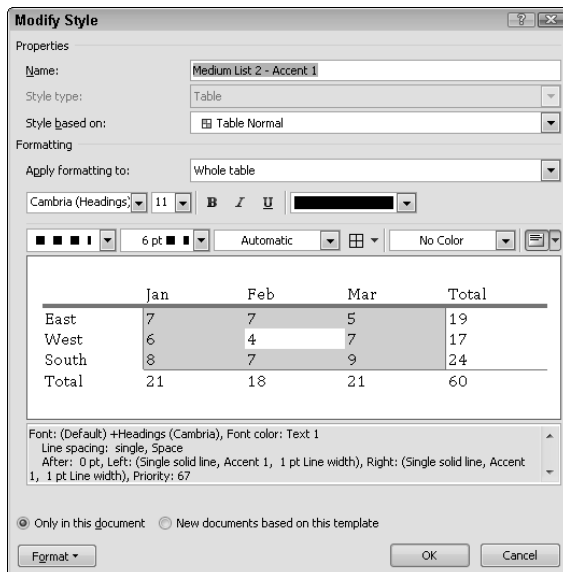
To modify a table style that appears in the Table Styles gallery, click the Modify Table Style option. The Modify Style dialog box opens, as shown in Figure 4-12. From this dialog box, you can change nearly every aspect of the table's formatting.



**Figure 4-11:**  
The Table  
Styles  
gallery.



**Figure 4-12:**  
The Modify  
Style dialog  
box.



You can set the formatting for several different elements of the table by choosing the element you want to format from the Apply Formatting To drop-down list. This drop-down list lets you select various table elements.

## *Merging Cells to Create Headings*

If your table requires a heading that spans more than one column, you can use the Merge Cells command, found on the Table Tools Layout tab. For example, Figure 4-13 shows a table in which the cell that contains the Survey Results heading is merged so that it spans four columns.

**Figure 4-13:**  
A table with  
merged  
cells.

Survey Results			
Word Feature	Like It	Hate It	What Is It?
Mail Merge	20%	50%	30%
Styles	25%	20%	55%
Templates	10%	5%	85%
Columns	35%	30%	35%
Tables	20%	70%	10%

To create a multicolumn heading, such as the one shown in Figure 4-13, follow these steps:

**1. Create the table as usual.**

For a heading that will span several columns, type the text into the cell above the first column that you want the heading to span.

**2. Highlight the cells in the row where you want to create a multicolumn heading.**



**3. Click the Merge Cells button in the Merge group on the Layout tab.**

The cells merge into one gigantic cell that spans several columns.

**4. If you want the heading centered over the cells, click the Center button on the Home tab or press Ctrl+E.**

To separate cells you merged, select the merged cell and click the Split Cells button in the Merge group. When Word asks for the number of columns to split the cell into, specify the number that the merged cell spans.

## *Designating Header Rows That Repeat from Page to Page*

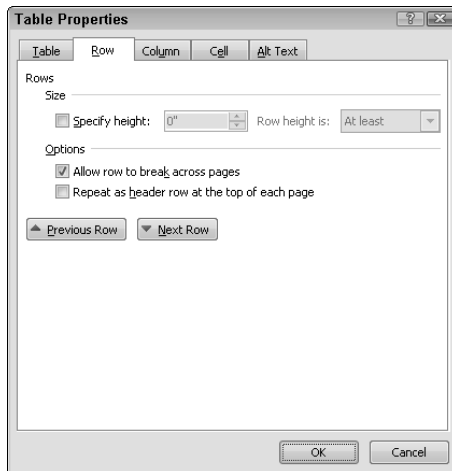
If you have an unusually long table that spans more than one page, you can designate the top row or rows of the table to serve as header rows, which repeat automatically at the top of each page. To do so, follow these steps:



1. Select the row or rows you want to use for headers (include the top row of the table in the selection).
2. Click the Properties button (on the Table Tools Layout tab) and select the Row tab of the Table Properties dialog box.
3. Select the Repeat As Header Row at the Top of Each Page option and click OK.

See Figure 4-14.

Word duplicates the selected rows at the top of each page where the table appears.



**Figure 4-14:**  
The Row tab  
of the Table  
Properties  
dialog box.

## Splitting a Table



Suppose that you create a large table and decide to drop a paragraph of normal text in the middle of the table, between two of the rows. In other words, you want to divide the table into two smaller tables. To do that, just select the row where you want to divide the table and click the Split Table button in the Merge group on the Table Tools Layout tab. Word divides the table into two and inserts a blank paragraph between the two tables.



Though you can't create two side-by-side tables in Word by splitting a table vertically (which is unfortunate), you can *simulate* two side-by-side tables by making an empty table column create empty space between two separately bordered areas of the table (see Figure 4-15). Here, what appears to be two tables is actually a single table: The space between them is an unused column with no borders or shading.

**Figure 4-15:**  
Creating the  
appearance  
of two side-  
by-side  
tables.

RED TEAM	BLUE TEAM
Gilligan	Hawkeye
Skipper	B.J.
Professor	Col. Potter
Ginger	Charles Emerson Winchester III
Mary Ann	Radar
Mr. Howell	Klinger
Mrs. Howell	Margaret

## Sorting a Table

Some tables contain rows of data that should be presented in sequence. For example, you might want to show a table that lists employees in order by employee name. Fortunately, the Sort button in Word lets you do just that. Here's the procedure:

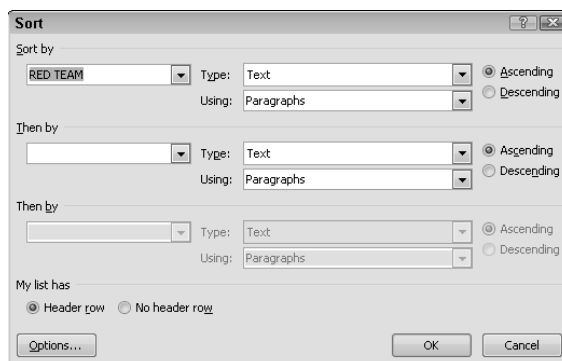
### 1. Select the rows you want to sort.

For the best results, select entire rows and leave out any heading rows you don't want sorted. Usually, you want to sort the entire table except for headings.



### 2. Click the Sort button, found in the Data group on the Table Tools Layout tab.

The Sort dialog box opens, as shown in Figure 4-16.



**Figure 4-16:**  
The Sort  
dialog box.

### 3. Specify the column you want to use to sort the table and select a sort type.

By default, the Sort dialog box sorts data into ascending sequence based on the first selected column. But you can pick a different column to sort by or choose to sort in descending sequence and then tell Word whether the column contains text, numbers, or dates. You can also sort

as many as three columns. (This setting tells Word which columns to use to determine the sort order. Keep in mind that Word keeps rows together when it sorts them.)

4. **If your selection includes a header row that you don't want sorted, select the Header Row option.**
5. **Click OK.**

## Using Table Formulas

If you can't afford a real spreadsheet program, you can use Word tables as sort of a poor man's spreadsheet. Like spreadsheets, Word tables let you enter data into rows, columns, and cells. It even lets you perform simple calculations on cells by using formulas similar to spreadsheet formulas.

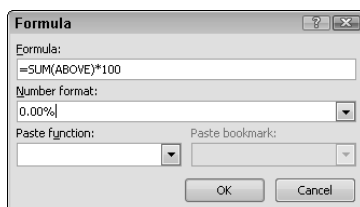
The most common use for formulas in a Word table is to add up the values in a row or column of cells. Here's the procedure:

1. **Select the cell where you want the total to appear.**
2. **Click the Formula button, found in the Data group on the Table Tools Layout tab.**



The Formula dialog box is displayed, as shown in Figure 4-17.

**Figure 4-17:**  
The Formula  
dialog box.



3. **Double-check the formula proposed by Word.**

Word takes its best guess at the cells you want to add. If you insert a formula to the right of a row of numbers, Word assumes that you want to add up the numbers to the left. If you place the formula beneath a column of numbers, Word assumes that you want to add up the numbers in the cells above.

4. **Click OK.**
5. **Double-check the result to ensure that the numbers are calculated correctly.**

Yes, your computer knows how to add and subtract, but the formula might be set up to calculate the total differently from the way you expect.

Besides adding a range of numbers, Word can perform a whole list of other functions. Table 4-5 summarizes the most common ones. In the Formula dialog box, you can use the Paste Function drop-down list to select functions other than Sum.

<b>Table 4-5      Formulas Most Commonly Used in Tables</b>	
<i>Formula</i>	<i>Explanation</i>
AVERAGE( )	The average of a list of cells
COUNT( )	The number of items in a list of cells
MAX( )	The largest value in a list of cells
MIN( )	The smallest value in a list of cells
PRODUCT( )	The product of a list of cells (all cell values multiplied together)
SUM( )	The sum of a list of cells



Just like formulas in a spreadsheet program (such as Excel), Word formulas use a reference system to refer to individual table cells. Each column is identified by a letter, starting with *A* for the first column, *B* for the second column, and so on. After the letter comes the row number. Thus, the first cell in the first row is *A1*, the third cell in the fourth row is *C4*, and so on. You can construct these types of cell references in formulas:

- ◆ A single cell reference, such as *B3* or *F7*
- ◆ A range of cells, such as *A2:A7* or *B3:B13*
- ◆ A series of individual cells, such as *A3,B4,C5*
- ◆ ABOVE or BELOW, referring to all cells in the column above or below the current cell
- ◆ LEFT or RIGHT, referring to all cells in the row to the left or right of the current cell

You can also construct simple math expressions, such as *C3+C5\*100*. You can use any of the standard mathematical operators:

- +      Addition
- Subtraction
- \*      Multiplication
- /      Division
- %      Percent



You can control the format of numbers that appear in formulas by editing the Number Format field in the Formula dialog box. The Number Format drop-down list includes several predefined formats. If you want, you can create your own number formats by using the characters listed in Table 4-6.

Table 4-6	Characters for Building Number Formats
Character	What It Does
0 (zero)	Displays single digit of result. If the result digit is zero, for example, it displays 0. Use this setting to ensure the display of a minimum number of digits; for example, 00.00 displays the value 1.01 as 01.01.
#	Displays single significant digit of result but doesn't display leading zeros.
x	Serves as rightmost digit on right side of decimal point to round result value at this digit. Use this setting in the rightmost decimal position to display a rounded result.
. (decimal point)	Displays a decimal point.
, (digit grouping symbol)	Separates a series of three digits; for example, ##,##,0.00.
– (minus sign)	Adds minus sign to negative result or adds space if result is positive or 0 (zero).
+ (plus sign)	Adds plus sign to positive result, minus sign to negative result, or space if result is 0 (zero).
%, \$, *, and others	Displays specified character.
'text'	Adds text to result and encloses text in single quotation marks.



You can provide separate number formats for positive, negative, and zero values by separating the number formats with semicolons. For example, ##,##0.00;(##,##0.00) encloses negative numbers in parentheses, and ##,##0.00;(##,##0.00);n/a displays negative numbers in parentheses and zero values as n/a.

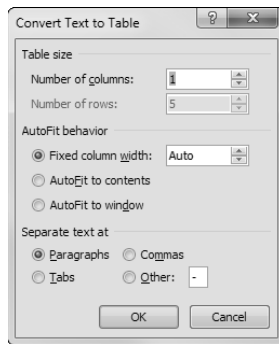
## Converting Text to a Table (and Vice Versa)

If you have tabular information that you didn't originally enter as a table, you can use the Convert Text to Table command to convert the text to a table. Word automatically creates a table for you, making its best guess at how many rows and columns the table contains based on the format of the data you highlighted. This guess is especially useful if the information was

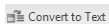
originally created outside of Word (for example, as a simple text file that used tabs to align information into columns).

To convert text to a table, first highlight the text you want to convert. Then open the Insert tab, click the Table button in the Tables group, and choose Convert Text to Table from the menu that appears. The dialog box shown in Figure 4-18 is displayed.

**Figure 4-18:**  
Converting  
text to a  
table.



The main thing to pay attention to here is the character Word uses to determine which text goes into each cell: tab, paragraph mark, comma, or any arbitrary character you want to use. Word usually deduces the proper character based on the text you highlight, but double-checking it is worth your time. If your table conversion doesn't work out as you expect, don't forget to press Ctrl+Z to undo your changes.



You can also convert an existing table to text. Select the table you want to convert and then click Convert to Text in the Data group on the Table Tools Layout tab. This action summons the Convert Table to Text dialog box, shown in Figure 4-19.

**Figure 4-19:**  
Converting  
a table to  
text.



Choose whether you want to use a paragraph mark, tab, comma, or another character to separate the text for each table cell. Then click OK to convert the table to text.



# Chapter 5: Inserting Fancy Text

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## *In This Chapter*

- ✓ Creating text boxes
- ✓ Using captions
- ✓ Inserting WordArt
- ✓ Employing callouts

**B**et you thought that text was text and graphics were graphics. Wrong! This chapter describes several Word features that let you incorporate text into your drawings. For example, you can add captions to pictures. You can also add text to most shape objects. And, you can use a special type of drawing object, *WordArt*, to create fancy logos.

Have fun!

## *Using Text Boxes*

A *text box* is a special type of shape designed to place text on your document without regard to the normal margins of the page. The most common use of text boxes is to add little bits of text to drawings. However, text boxes are also sometimes used to create interesting desktop publishing effects, such as pull quotes or sidebars. For example, Figure 5-1 shows a document with a *pull quote* — a floating text box that highlights a quote from the document.

The following sections describe the ins and outs of working with text boxes.

### *Creating a text box*

To create a text box, follow these steps:

1. Click the **Text Box** button, located in the **Text** group on the **Insert** tab.
2. Choose **Draw Text Box** from the menu that appears.
3. Click where you want one corner of the text box to appear and drag to where you want the opposite corner.

Drawing a text box is similar to drawing a rectangle.

4. Release the mouse button and then type your text.

The insertion pointer is automatically positioned in the text box, so you can immediately start typing text after you draw the text box.

**Figure 5-1:**  
A document  
with a text  
box.



The default wrapping style for a text box is In Front of Text. With this setting, the text box obscures any other text in the document that happens to fall behind the text box. In most cases you change this setting to a more appropriate one, such as Tight or Square. To do that, click inside the text box, display the Drawing Tools Format tab, and change the Wrap Text setting. (For more information about what the different wrapping styles do, see Chapter 2 of this minibook.)



In Chapter 1 of this minibook, I discuss shape objects. Well, shapes can also function as text boxes. If you want to add text to a shape, just click the shape and start typing. The text appears centered over the shape. (The only shapes that don't accept text are lines. But you probably guessed that.)



You can also insert a text box into your document by using one of the sample text boxes that appear in the gallery when you click the Text Box button in the Insert tab.

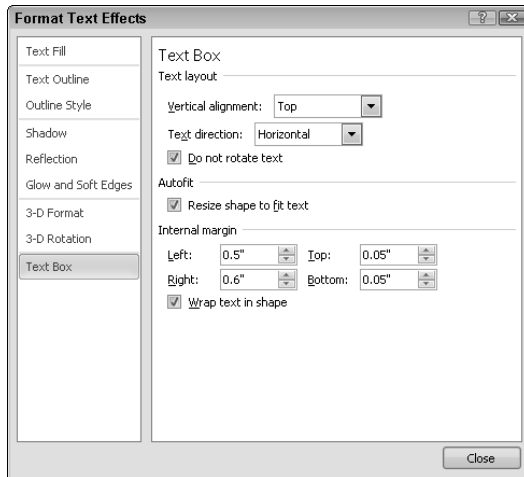
## *Formatting a text box*

After your text box is in place, you want to apply some formatting. To start, you can format the text in the text box by highlighting the text and using the text formatting controls on the Home tab. For more information about formatting text, turn to Book II, Chapter 2.

You can format the text box itself by using any of the formatting controls on the Drawing Tools Format tab. These controls are the same ones that appear on the Format tab for any shape object. For more information, see Chapter 1 of this minibook.

By default, the text in a text box is indented  $\frac{1}{10}$ -inch from the left and right sides of the text box and  $\frac{5}{100}$ -inch from the top and bottom. If you want to change this indentation (I often set it to zero), click the WordArt Styles dialog box launcher on the Drawing Tools Format tab and click the Text Box tab, as shown in Figure 5-2. Then you can set the top, left, right, and bottom margins.

**Figure 5-2:**  
The Text  
Box tab of  
the Format  
Text Effects  
dialog box.



In addition, you can set these two options:

- ◆ **Resize Shape to Fit Text:** This option automatically adjusts the size of the text box to fit the text you type in it. You usually leave this option turned off. You can always adjust the size of the text box manually by dragging any of the text box's corner handles.
- ◆ **Wrap Text in Shape:** You almost always leave this option turned on. If you turn it off and the text box isn't wide enough, the text may be cut off.

## Rotating text

Previous versions of Word did not allow you to rotate the text in a text box, but with Word 2010 you can! Just select the text box, grab the green rotation handle that appears above the text box, and drag to rotate the box.

## Using linked text boxes

If a text box isn't big enough to display all its text, Word lets you continue the text into another text box. For example, you might use text boxes to create a sidebar that has text related to the main topic of your document. If the sidebar is particularly long, you can continue it in another text box.

Just follow these steps to create a set of nicely linked text boxes:

**1. Type the text you want to place in a series of text boxes.**

Linked text boxes work best if you first create the text they contain. You can even type the text in a separate document, if you want.

**2. Create two or more text boxes to hold the text.**

Position the text boxes where you want them to appear in your document. They don't have to be on the same page.

**3. Select the text you typed in Step 1 and press Ctrl+C.**

The text is copied to the Clipboard.

**4. Select the first text box and press Ctrl+V.**

The text from the Clipboard is pasted into the first text box. The text box displays as much of the text as it can; the rest is hidden.

**5. Click the Create Link button in the Text section of the Drawing Tools Format tab.**

The cursor changes to a weird-looking coffee cup.

**6. Click the second text box.**

This action spills the coffee into the second text box. In other words, the overflow text from the first text box continues into the second.

**7. If you want to spill text into additional text boxes, repeat Steps 5 and 6.**

You can link as many text boxes together as you want.



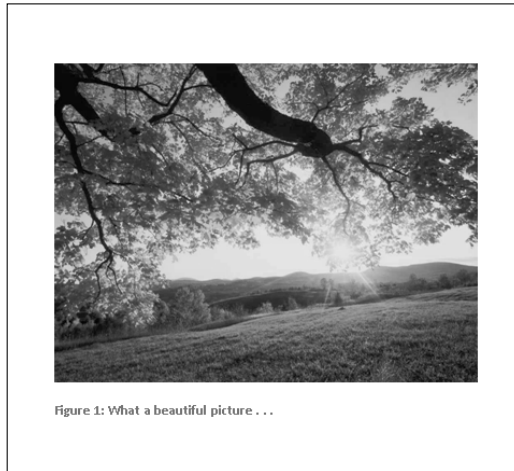
To break the link between two text boxes, click inside the first text box and then click the Break Link button in the Text group on the Drawing Tools Format tab.

## *Adding Captions to Your Pictures*

A *caption* is a bit of text that identifies a figure, table, chart, or other visual element you include in a document. Captions usually include a reference number (for example, Figure 58 or Table 293). Figure 5-3 shows a picture with a caption.

If you want, you can create captions by simply creating a text box to hold the caption. (I cover text boxes earlier in this chapter.) But the Word Caption feature automatically numbers your captions when you insert them, keeps the numbers in order, and lets you create a table of figures, tables, charts, or whatever when you're all done. You paid for this program, so you might as well know how to use as much of it as possible.

**Figure 5-3:**  
A picture  
with a  
caption.



To add a caption to a picture, table, chart, or another graphical goodie, follow these steps:

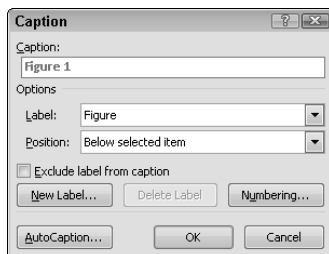
1. **If you haven't done so already, insert the picture you want to apply the caption to.**

For more information, see Chapter 2 of this minibook.

2. **Select the picture that you want the caption attached to.**
3. **Click the References tab on the Ribbon and then click the Insert Caption button in the Captions group.**

You see the Caption dialog box, shown in Figure 5-4.

**Figure 5-4:**  
The Caption  
dialog box.



4. **Type the caption.**

Word starts the caption for you by providing the reference number. Type whatever text you want to describe the figure, table, chart, or whatever.

**5. Change the Label field if it's incorrect.**

Word keeps track of caption numbers separately for figures, tables, and equations. When you insert a caption, make sure the Label field is set to the type of caption you want to create.

**6. Change the Position field if you want to change the positioning.**

The two options are Above or Below the selected item.

**7. Click OK.**

Word inserts the caption.

Here are a few rapid-fire thoughts designed to inspire your use of captions:



- ◆ If you want to create captions for something other than figures, tables, and equations, click the New Label button and type a label for whatever you want to create captions for; for example, a limerick. Click OK, and from then on Limerick appears as one of the Label types.

- ◆ When you create a caption, Word automatically applies the Caption style to the caption paragraph. You can control the format of all captions in a document by modifying the Caption style. (For more information about styles, see Book II, Chapter 3.)

- ◆ You can create a table of figures, tables, equations, or limericks by using the Insert Table of Figures command on the References tab on the Ribbon. (For more detailed information about this feature, see Book VI, Chapter 1.)



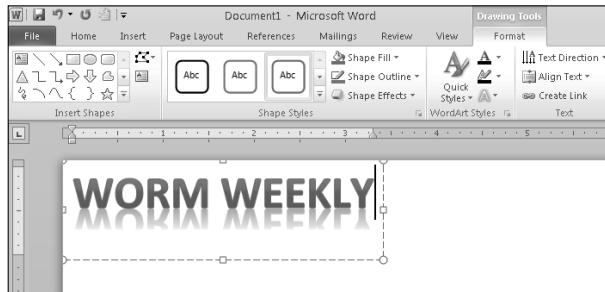
- ◆ At various and sundry times, caption numbers stray out of sequence. Fear not! Word can put the caption numbers back into sequence when you print the document. If you're tired of looking at out-of-sequence numbers, press Ctrl+A to select the entire document and then press F9 to recompute the caption numbers.

- ◆ If you want Word to always create a caption whenever you insert a particular type of object into your document, click the AutoCaption button in the Caption dialog box. A dialog box lists all the various types of objects you can insert into a Word document. Select the ones you want to automatically create captions for and then click OK.

## *Creating Fancy Text with WordArt*

The nifty little WordArt feature transforms a snippet of ordinary text into something that looks like you paid an ad agency an arm and a leg to design. Figure 5-5 is an example of what you can do with WordArt in just a couple of minutes.

**Figure 5-5:**  
You, too,  
can create  
fancy text  
effects like  
this one  
by using  
WordArt.

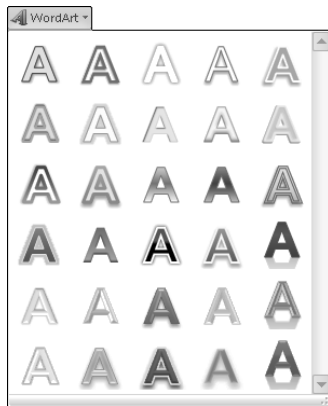


Follow these steps to transform mundane text into something worth looking at:

1. Click the WordArt button in the Text group on the Insert tab.

This step opens the WordArt gallery, shown in Figure 5-6.

**Figure 5-6:**  
The  
WordArt  
gallery  
offers a  
choice of  
WordArt  
styles.



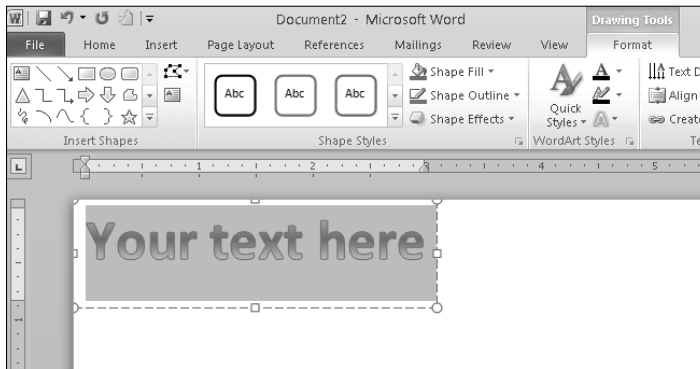
2. Click the WordArt style that most closely resembles the WordArt you want to create.

The WordArt text box appears in your document along with the Drawing Tools Format tab on the Ribbon, as shown in Figure 5-7.

3. Type in the text box the text you want to use for your WordArt.
4. Fool around with the WordArt controls and formatting options on the Drawing Tools Format tab on the Ribbon.

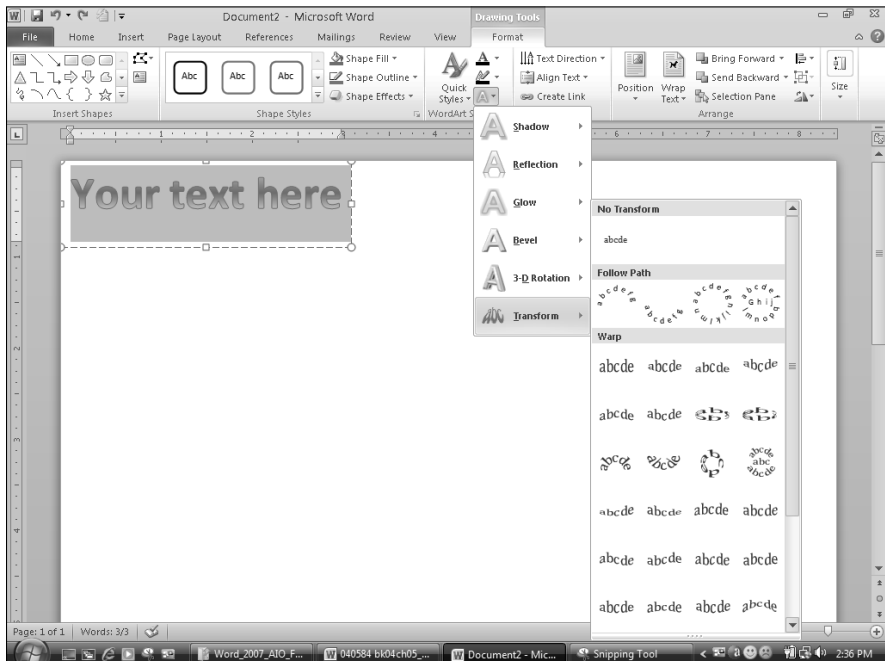
When you create a WordArt object, the Ribbon displays the Drawing Tools Format tab. Experiment with these controls as much as you want until you make the text look just right.

**Figure 5-7:**  
The  
WordArt  
text box.



The Transform command on the Text Effects menu (in the WordArt Styles group) is the key to creating fancy logos, such as text that wraps around circles. Figure 5-8 shows the menu that appears when you point to this command. Experiment with these shapes to see how they work. If you want to edit the text in WordArt shapes, just click the box and make your corrections. The text straightens out to let you make your changes, and it reverts to your chosen shape when you're finished and click out of the box.

**Figure 5-8:**  
The  
Transform  
gallery.





## Drawing a Callout

A *callout* is a special type of shape that resembles a text box but has a line or series of bubbles connecting it to another object, as shown in Figure 5-9. In the figure, the callouts illustrate the rabbit's thoughts.



**Figure 5-9:**  
The proper  
use of  
callouts.

Follow these steps to create callouts to contain your own thoughts:

- 1. Select the Insert tab and then click the Shapes button.**  
A gallery showing about a million different shapes appears. Within it is a group of more than a dozen different callout styles under the Callouts heading.
- 2. Select the callout type you want to use.**
- 3. Click where you want the upper-left corner of the callout to appear and then drag out the shape of the callout.**

After you release the mouse button, the callout box appears.

- 4. Drag the little yellow dot that appears at the end of the connecting line (or bubbles, if you choose the *thought bubble* callout type — refer to Figure 5-9) to the spot where you want the callout.**

As you drag the little yellow dot, the shape of the callout changes.

- 5. Click in the callout, and then type some callout text.**

Word inserts the text into the callout. Presto! You're finished.

Keep these points in mind when you work with callouts:

- ◆ If the text doesn't fit inside the callout, try dragging the callout by one of its handles to increase the size. Or, right-click the callout and choose Format Shape from the menu that appears. Then click the Text Box tab and reduce the margins for the callout. Smaller margins allow the text to creep closer to the inside boundaries of the callout.
- ◆ Think cheerful thoughts, if you can.

# Chapter 6: Other Things You Can Insert in Your Documents

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## *In This Chapter*

- ✓ Adding a cover page to your document
- ✓ Using drop caps
- ✓ Dealing with symbols
- ✓ Adding equations for fun and profit
- ✓ Inserting a screenshot in your document

**T**his chapter covers a variety of items that live on the Insert tab on the Ribbon but aren't covered in other chapters. I tell you how to insert elements such as cover pages, drop caps, and special symbols into your documents. Happy inserting!

## *Inserting a Cover Page*

The Cover Page drop-down menu provides a simple way to add a professionally designed cover page to a Word document. Figure 6-1 shows the type of cover page you can create with just a wave of your mouse. All you have to do to create a cover page like this one is select the design and type the text.

To create a cover page, follow these steps:

### **1. Don't worry about moving to the first page in your document.**

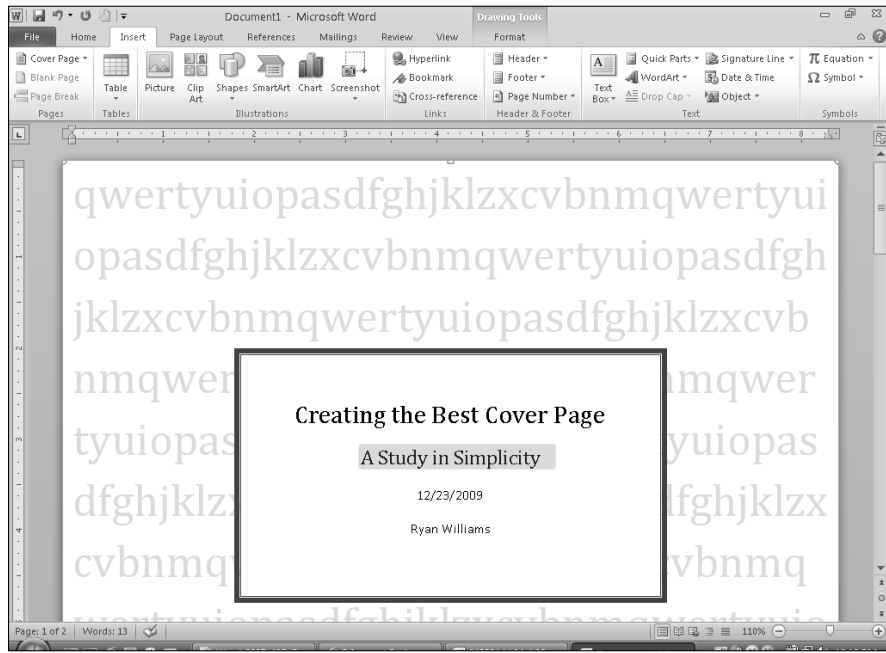
I realize that this step isn't truly a step because it tells you *not* to do something. But when I first saw the Cover Page feature, I wondered whether you had to navigate your way to the beginning of the document to insert a cover page. It turns out that you don't. No matter where the insertion point is in the document, the cover page is inserted at the beginning of the document, before the document's first page.



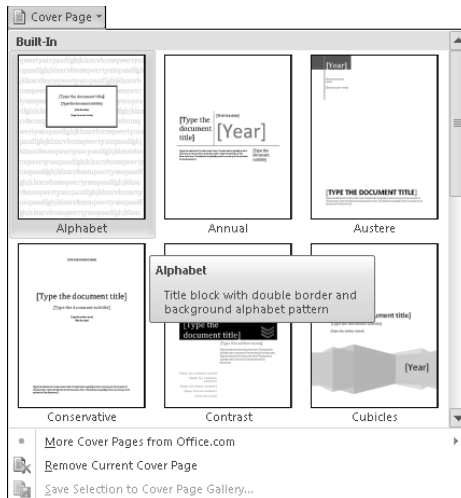
### **2. Open the Insert tab on the Ribbon and click the Cover Page button.**

The Cover Page gallery appears, as shown in Figure 6-2.

**Figure 6-1:** Word 2010 can easily add cover pages like this one to your documents.



**Figure 6-2:** The Cover Page gallery.



### 3. Click the cover page style you want to use.

Word inserts the cover page at the beginning of the document. Initially, the cover page includes placeholder text for the document title, subtitle, and cover page copy.

#### 4. Type the title, subtitle, and cover page copy for the cover page.

If you don't want to include a subtitle or additional copy on the cover page, you can use the Delete key to delete those elements.

That's all! You can now admire your beautiful cover page.

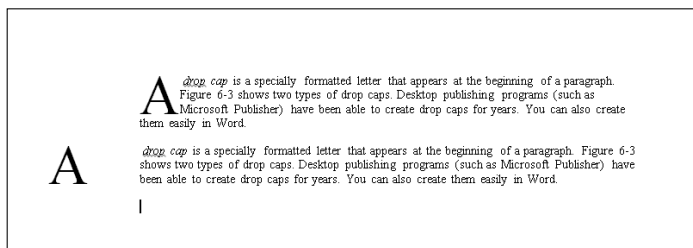
Ponder these additional points as you lie awake tonight, marveling at this useful new feature:

- ◆ You can delete a cover page by clicking the Cover Page button and choosing the Remove Current Cover Page command.
- ◆ If you modify the design of the cover page, you can add your customized page to the Cover Page gallery by clicking the Cover Page button and choosing the Save Selection to Cover Page Gallery command. A dialog box appears, asking for a name and other descriptive information. Then your custom page is added to the gallery.
- ◆ You can insert a cover page somewhere in the middle of your document (suppose that you want to start a section). Simply right-click the Cover Page in the gallery. This contextual menu reveals several other interesting options.

## Inserting a Drop Cap

A *drop cap* is a specially formatted letter that appears at the beginning of a paragraph. Figure 6-3 shows two types of drop caps. Desktop publishing programs (such as Microsoft Publisher) have been able to create drop caps for years. You can also create them easily in Word.

**Figure 6-3:**  
A drop cap.



As you can see in the figure, Word offers two drop cap styles. The first, and most common, begins the paragraph with a large letter that spills down into the text. Thus, the first few lines of the paragraph are displaced by the drop cap. The second style places the large first letter in the margin adjacent to the paragraph.

To create a drop cap, follow these steps:

1. **Type the paragraph as you normally would, without worrying about any special formatting for the first letter.**

When you use the Drop Cap command, the special formatting for the first letter is taken care of.



2. **Open the Insert tab on the Ribbon and click the Drop Cap drop-down menu (shown in the margin).**

A menu that lists the two drop cap styles appears.

3. **Choose the drop cap style you want to use.**

The first letter of the paragraph is converted to an object that's properly positioned for the drop cap.

4. **Adjust the drop cap, if you want to.**

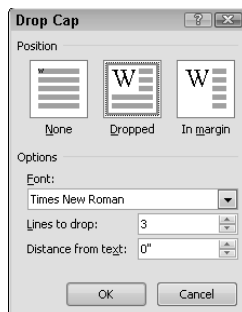
Because the drop cap consists simply of text placed inside a text box, you can use any Word formatting feature to format the drop cap to your liking. Change its size, switch colors, or add a shadow, if you want.

You're done!

If you want to remove the drop cap, click the Drop Cap button on the Insert tab and choose None.

For greater control over the drop cap, click the Drop Cap drop-down menu and choose Drop Cap Options. The Drop Cap dialog box, shown in Figure 6-4, opens and lets you set several additional drop cap options. In particular, you can specify the number of lines to drop the first letter and the distance to displace the drop cap from the rest of the text.

**Figure 6-4:**  
The Drop  
Cap dialog  
box.

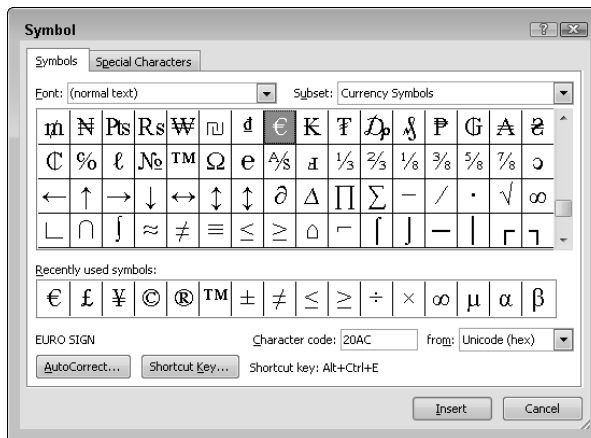


## Inserting a Symbol



The Insert tab's Symbol drop-down menu (shown in the margin) lets you insert a special symbol into your document. The most commonly used symbols appear in a Symbol gallery that's displayed when you click this button. To insert one of these symbols, simply click the symbol you want to insert.

If the symbol you want to insert isn't in the gallery, choose the More Symbols command to open the Symbol dialog box, shown in Figure 6-5. You can insert a symbol from this dialog box by double-clicking the symbol or selecting the symbol and clicking Insert. Then click Close to close the Symbol dialog box.



**Figure 6-5:**  
The Symbol  
dialog box.



You can also insert certain symbols by using the predefined keyboard shortcuts shown in Table 6-1.

**Table 6-1 Keyboard Shortcuts for Special Symbols**

<i>Symbol</i>	<i>Name</i>	<i>Shortcut</i>
©	Copyright	Ctrl+Alt+C
—	Em dash	Ctrl+Alt+- (minus sign on numeric keypad)
-	En dash	Ctrl+- (minus sign on numeric keypad)
...	Ellipsis	Ctrl+Alt+. (period)
®	Registered mark	Ctrl+Alt+R
™	Trademark	Ctrl+Alt+T

The following concepts can help you in your quest for special characters:

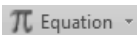


- ◆ You can add a keyboard shortcut to any special character by summoning the Symbol dialog box (refer to Figure 6-5). Then click the Symbols tab or the Special Characters tab in the dialog box and click the Shortcut Key button.
- ◆ An *em dash* is a dash the width of the letter *M*. An *en dash* is as wide as the letter *N*. If you're using a dash as a punctuation mark — like this — use an em dash rather than two hyphens. The old double-hyphen treatment is a carryover from the days of manual typewriters. (The AutoCorrect feature can insert these characters for you. Just type a pair of hyphens and AutoCorrect automatically converts them to an em dash.)
- ◆ The minus sign required for the em dash and en dash shortcuts is the minus sign on the numeric keypad, way off to the far right side of the keyboard. (This key would probably be Rush Limbaugh's favorite key if he used a PC, but he's a Mac fanatic.) The shortcut doesn't work if you use the hyphen that's between the zero (0) and the equal sign (=) at the top of the keyboard.
- ◆ Notice also that the Special Characters tab lets you select the most commonly used special symbols from a list.

## *Inserting an Equation*

Steven Hawking wrote in the preface to his book *A Brief History of Time* that his editor warned him that every mathematical equation he included in the book would cut the book's sales in half. So he included just one: the classic  $e=mc^2$ . See how easily you can type that equation? The only trick is remembering how to format the little superscript <sup>2</sup>.

My editor promised me that every equation I included in this book would double its sales, but I didn't believe her; not even for a nanosecond. But just in case, Figure 6-6 shows some examples of the equations you can create by using Word's handy-dandy Equation feature. You wouldn't even consider trying to create these equations by using ordinary text, but they took me only a few seconds to create by using Equation Editor. Aren't they cool? Tell all your friends about the cool equations in this book so that they'll all rush out and buy copies for themselves. Or, better, read this section to find out how to create your own knock-'em-dead equations, and then try to convince your friends that you understand what they mean.



To add an equation to a document, open the Insert tab on the Ribbon and click the arrow on the Equation button (shown in the margin). This action displays the Equation gallery, shown in Figure 6-7. Pick the equation you want to use from this gallery and Word inserts the equation into the document.



**Figure 6-6:** Eight equations that likely won't affect sales of this book either way.

$$A = \pi r^2$$

$$(x + a)^n = \sum_{k=0}^n \binom{n}{k} x^k a^{n-k}$$

$$(1 + x)^n = 1 + \frac{nx}{1!} + \frac{n(n-1)x^2}{2!} + \dots$$

$$f(x) = a_0 + \sum_{n=1}^{\infty} \left( a_n \cos \frac{n\pi x}{L} + b_n \sin \frac{n\pi x}{L} \right)$$

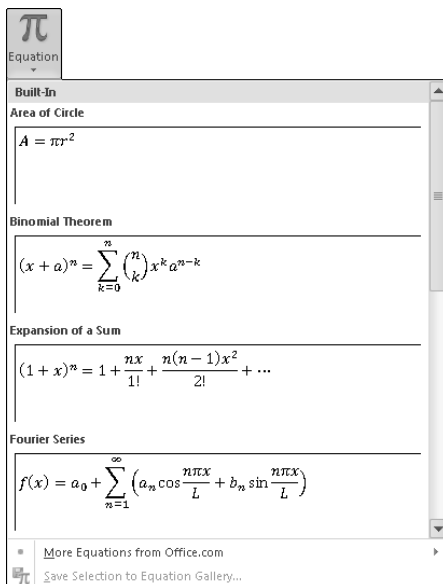
$$a^2 + b^2 = c^2$$

$$x = \frac{-b \pm \sqrt{b^2 - 4ac}}{2a}$$

$$e^x = 1 + \frac{x}{1!} + \frac{x^2}{2!} + \frac{x^3}{3!} + \dots, \quad -\infty < x < \infty$$

$$\sin \alpha \pm \sin \beta = 2 \sin \frac{1}{2}(\alpha \pm \beta) \cos \frac{1}{2}(\alpha \mp \beta)$$

**Figure 6-7:** The Equation gallery.



The Equation gallery offers several popular types of equations, but odds are good that the equation you need for your document isn't in the gallery. In that case, select an equation that's close to what you want and then modify it as needed. Or, if you prefer, choose Insert New Equation to start an equation from scratch.

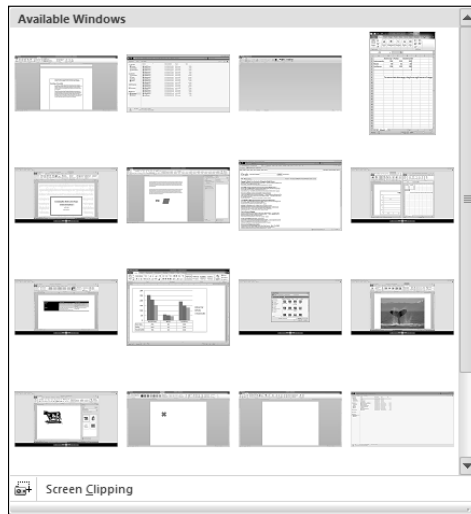
When you select an equation, a special Equation Tools Design tab appears on the Ribbon with tools that let you edit the equation. I leave it to you to experiment with the controls on this tab.

Note that the AutoCorrect feature also includes shortcuts for creating equations. Choose File⇒Options. Then select the Proofing tab and click the AutoCorrect Options button. Then click the Math AutoCorrect tab. This action displays a list of the equation shortcuts you can use. For example, you can type **\alpha** to insert a Greek letter alpha ( $\alpha$ ).

## *Inserting a Screenshot*

A *screenshot* is a picture that represents the contents of your computer display — either the entire display or just a single dialog box. Screenshots are especially useful when you're preparing instructions for using computer software. In fact, most of the figures in this and other *For Dummies* books are screenshots.

Word 2010 includes an Insert Screenshot feature that makes it easy to insert a screenshot into your document. To use this feature, first open the program you want to illustrate in your screen shot. Then switch over to Word, click the Insert tab, and then click the Insert Screenshot button (found in the Illustrations group). Word displays a gallery that includes every window that is currently open on your computer, as shown in Figure 6-8. Click the one you want, and Word inserts it as a picture in your document.



**Figure 6-8:**  
Inserting a  
screenshot.



If you want to insert a part of your Windows screen that doesn't appear in the gallery, choose the Screen Clipping option that appears at the bottom of the gallery. When you choose this option, your entire Windows display fades to a light color, and the mouse pointer changes to a selection tool. Click and drag the mouse pointer to select the part of the Windows display that you want to insert into your document. When you release the mouse, the screen area you selected is inserted as a picture.

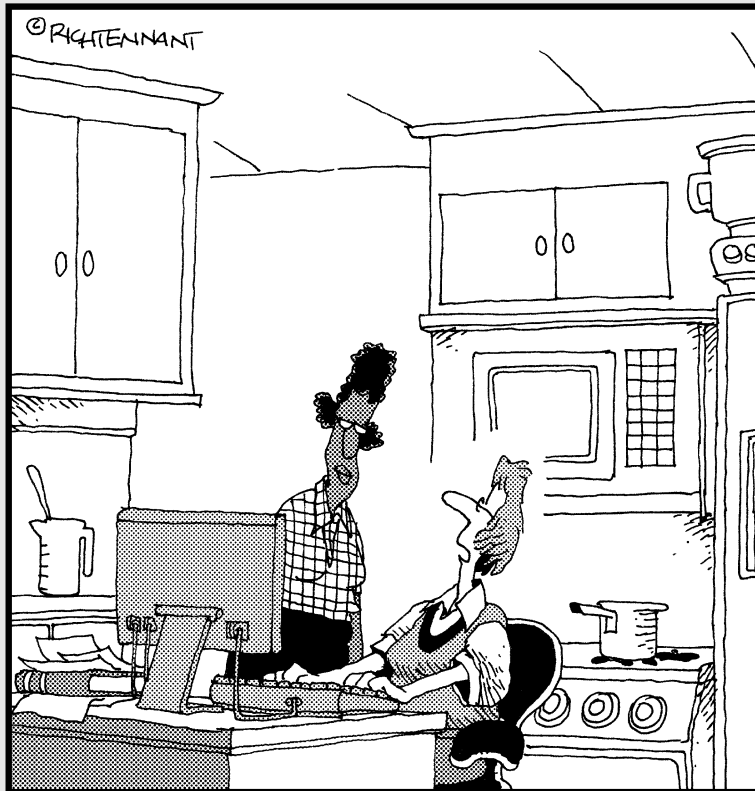


# Book V

## Publish or Perish

The 5<sup>th</sup> Wave

By Rich Tennant



"I wrote my entire cookbook in Word. The other programs I saw just didn't look fresh."

*Contents at a Glance*

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# Chapter 1: Blogging with Word

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## *In This Chapter*

- ✓ Linking your existing blog with Word 2010
- ✓ Writing, editing, and publishing blog entries

**H**aving a Web log, or blog, is the latest thing. You know that this thing has become mainstream when the *Washington Post* starts referencing blogs as critical sources. You know that this thing is here to stay when the most popular word-processing software in the world adds the capability to publish a Word document as a blog entry.

A *blog* is a diary of sorts that is published online and characterized by ease of editing, the ability of readers to add comments about entries, and syndication of some kind. Jorn Barger coined the term *Web log* in 1997, though people were making daily updates to their sites before then.

The world of blogging uses three types of software:

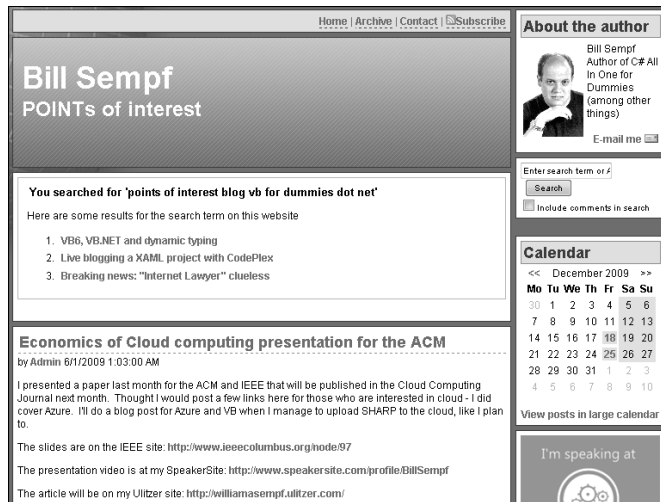
- ◆ **Authoring:** Used to create the blog entry
- ◆ **Hosting:** Organizes the blogs, syndicates them, and provides for comments
- ◆ **Reader:** Consumes the syndication

In this chapter, I'm concerned only about the creation of blogs (hence the chapter title), but in order for that process to be of any use to you, you need a general understanding of blogging. Therefore, I throw tips and suggestions your way as I go. In the meantime, I recommend that you reference the Wikipedia entry on *blog* (<http://en.wikipedia.org/wiki/Blog>). I also suggest that you check out *Blogging For Dummies*, by Susannah Gardner and Shane Birley.

## *Introducing Word's Blogging Features*

What Word provides is the ability to create a blog entry by using the word processor. Then you can move the entry seamlessly to your blog without having to copy and paste into a form or directly upload a document or even open your Web browser.

I don't get into a big discussion of what a blog is here, but — for the record — Figure 1-1 shows what a typical blog looks like on the Web. It's just a Web page with diary entries.



**Figure 1-1:**  
A blog entry.

Word lets you avoid what is usually a Web-based entry screen for your blog so that you can use the familiar Word interface instead. The blogging feature is, in a sense, all of Word.

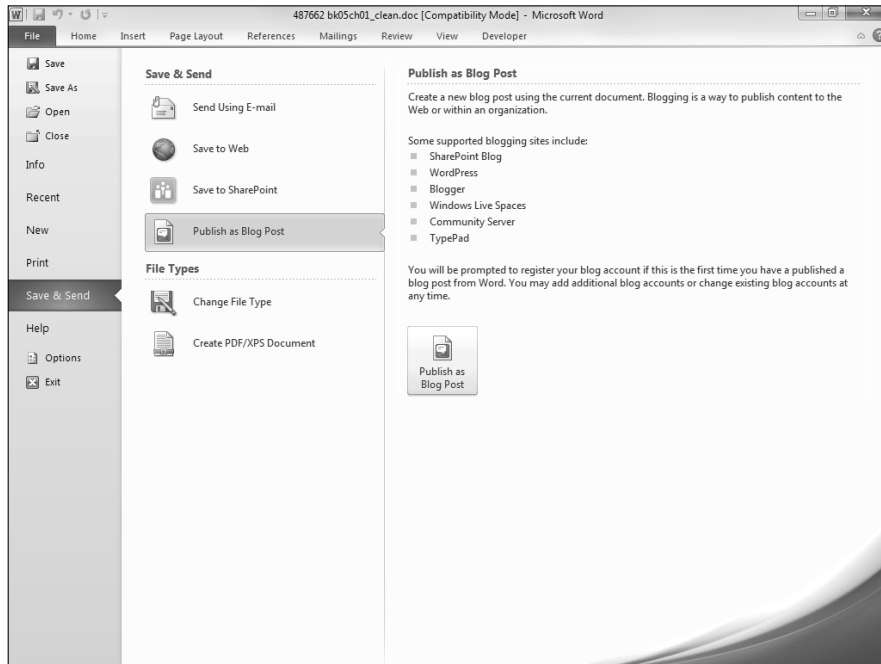
Word provides all this capability in the Publish As Blog Post command, under the Share section of the File tab (see Figure 1-2). This command starts a process that moves your blog entry to your blog. As part of that process, the command transfers your document to HTML, uses the blog's Upload API (application programming interface) to move the document, and sets up the document for display.

To use the Word blogging features, you need a couple of items:

- ◆ **Content:** Content should be easy enough to come up with. If you have something to say, it's worth blogging about. I don't know you (though if we happen to meet, I hope you'll introduce yourself), but I'm certain that what you have to say is better than most of what is out there.
- ◆ **A blog host:** Word is set up to use Blogger.com, SharePoint, the Telligent Community Server, Windows Live Spaces, WordPress, and several other blog hosts.

Of course, the best way to get the gist of working with Word's blogging features is to blog with Word. The following section shows you how to put together a blog entry.





**Figure 1-2:**  
The Publish  
As Blog  
Post  
command.

## Creating and Editing Blog Posts

Creating a blog post is remarkably easy: Just make a document. In fact, I have been using this chapter's Word file as my test case for the blogging tools, and I'm surprised at how well Word handles creating blog posts.

### Working from a blank entry

Word seems to give you a couple of creation options: You can start with an existing document or an empty one. The New command provides an option to create the new blog entry:

#### 1. Choose File→New.

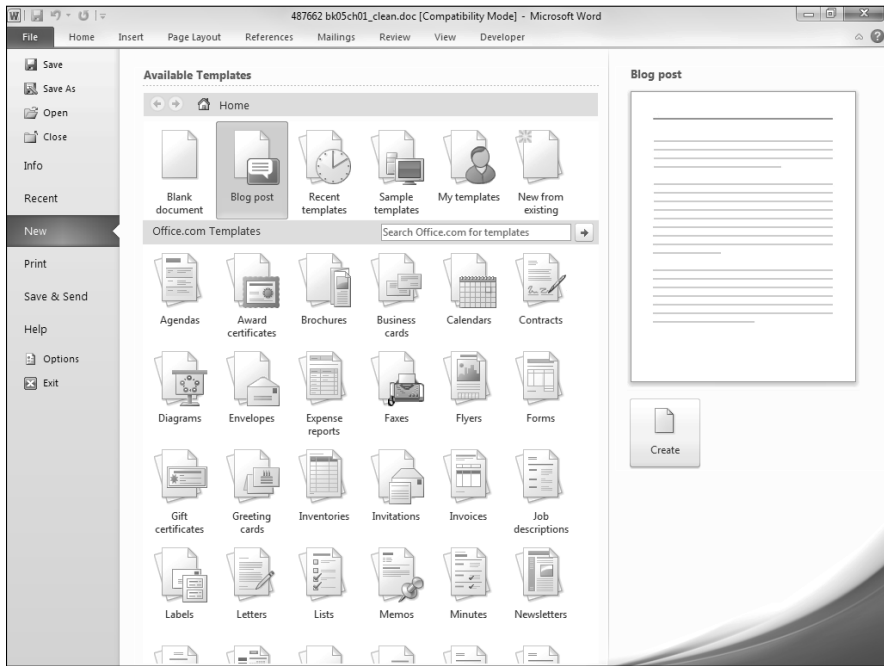
The New page is displayed in Backstage view.

#### 2. Select Blog Post from the New page and click Create.

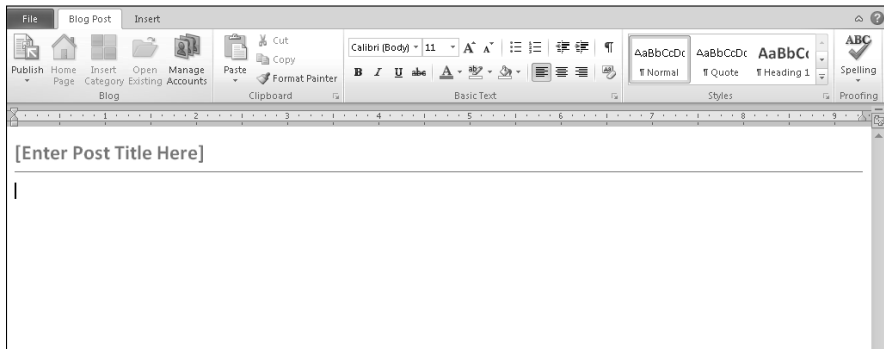
As shown in Figure 1-3, you have the option to create a new blog entry from a template.

Word creates an empty blog post for you, as shown in Figure 1-4.

**Figure 1-3:**  
Selecting a blank blog entry.



**Figure 1-4:**  
The default blogging template.



If this is your first time creating a blog post, a dialog box appears, asking whether you want to register a blog account. For more information, see the later section “Registering a Blog Account.”

You can start here and work from a blank document, if you like. You might notice that the blog entry template adds a neat Blog Post tab on the Ribbon with publishing-specific features and editing tools that every blogger needs in these groups:

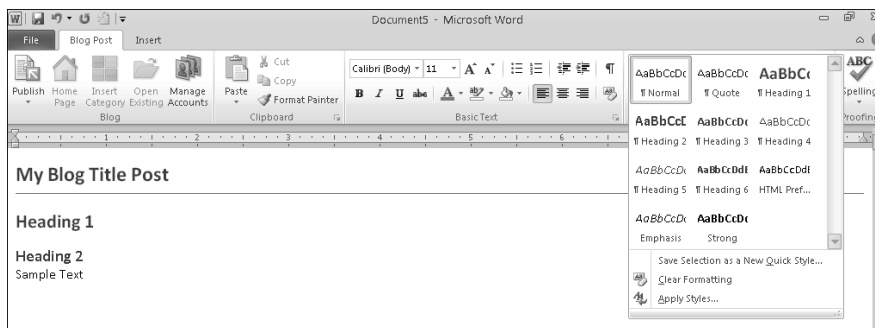
- ◆ Blog
- ◆ Clipboard
- ◆ Basic Text
- ◆ Styles
- ◆ Proofing

The Insert tab is also specific to blogging, but I describe that tab later, in the section “Inserting Hyperlinks and Stuff.” For now, I stick with formatting.

If you’re starting with a blank entry, format it as you would any other Word document. Tabs, lines, color, whatever — it all works. You must understand some of the constraints of Web development, but the Styles gallery on the Blog Post tab helps out. (See Book II, Chapter 3 for the lowdown on styles.) Just stick with the tasks that Word allows and you’ll be fine — no special knowledge necessary.

To see an example, just create a sample chunk of text with a few headings and use the mouse to scroll through the styles provided as part of the blog entry template. As shown in Figure 1-5, you have just a few simple choices for formatting text.

**Figure 1-5:**  
Styles  
available for  
blogs.



Word offers many fewer options for blogs than it does for Office documents. That’s because, frankly, you just can’t do as much with a blog entry because it’s eventually being posted on the Web.

Don’t forget to fill out the Post Title field, shown in Figure 1-6. You’re filling out a form here, with two fields. You put the title in the Post Title field and everything else is considered the entry.

**Figure 1-6:**  
The Post  
Title field.

[Enter Post Title Here]

## *Editing blog entries*

You edit a blog post in about the same way as you edit any other document. You have the usual access to the spelling dictionary, Research task pane, thesaurus, and Language settings. You can't find those on the average Web-based blog-editing screen.

However, after you publish a blog entry (which you find out about later, in "Publishing Blog Posts"), your fate is sealed. If you want to edit the document, you have to do it by using the built-in tools of the blogging engine.

Why? Because the post mechanism moves the content of your post from the Word document into a database on the host side of the process. After you publish, the data is disconnected from the Word document and your changes are discarded.

Compare this process to e-mailing a copy of a letter: If you create a document and e-mail it, and then you make changes to the original document a month later, the person you mailed the original message to a month ago doesn't see the changes. You have to e-mail a new document or ask the recipient to let you see the original so that you can make changes. The same concept applies to editing a blog entry.

## *Registering a Blog Account*

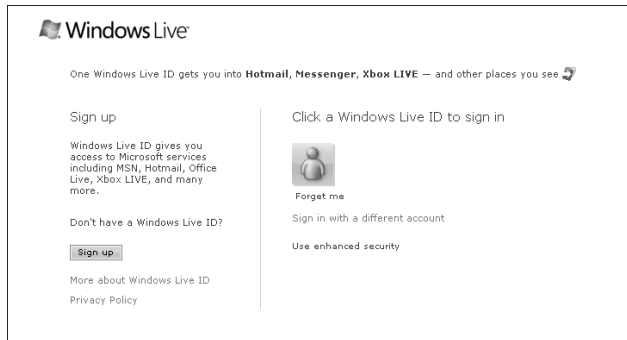
You must have an existing blog account in order to use Word to publish to your blog. Word helps you register your account so that you can publish, but registering the blog is up to you.



The instructions I present assume that you're registering your blog with Windows Live Spaces. The exact procedures for other blog hosts may be slightly different. For that matter, Windows Live Spaces may also change its registration procedures by the time you read this section. So pay close attention to the instructions on the Web site as you register your blog account.

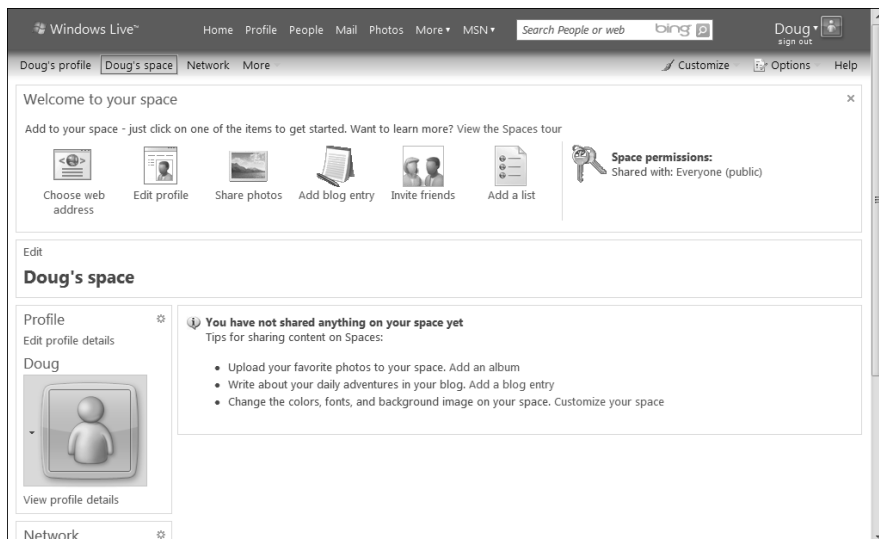
To use Windows Live Spaces, you must first set up a free Windows Live account. Setting up the account is easy: Just open your Web browser and go to <http://spaces.live.com>, as shown in Figure 1-7. Then click the Sign Up button to create your account.

**Figure 1-7:**  
Going to  
Windows  
Live.



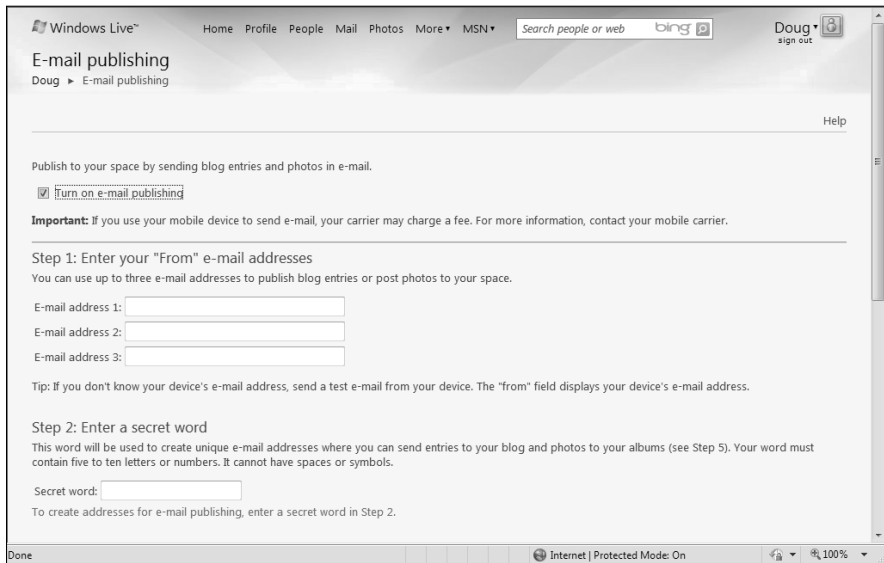
After you sign up for Windows Live, click the Create Your Space link to set up your space, as shown in Figure 1-8. This page lets you customize the appearance and content of your Windows Live Space.

**Figure 1-8:**  
Setting  
up your  
Windows  
Live Space.



On this page, you can click Options (near the upper-right corner) and choose E-Mail Publishing to configure your space for e-mail publishing, which is required in order to create and edit blog posts from Word. Figure 1-9 shows the page that's displayed when you choose Email Publishing from the Options menu.

**Figure 1-9:**  
Setting  
up e-mail  
publishing.



To configure e-mail publishing, just follow the steps on the E-Mail Publishing page. You're asked to enter your e-mail address and to create a secret word. Then click Save.

Next, you should create a Web address for your space. To do that, click Choose Web Address on the Welcome to Your Space page. A page opens that lets you enter a word to be used as a name for your space. When you find a name you like that hasn't already been used by another Windows Live user, click Save.

With all these steps behind you, you can now register your Windows Live space with Word. Create a new document using the Blog Post template. Then follow these steps:

- 1. Click the Manage Accounts button in the Blog group on the Blog Post tab.**

The Blog Accounts dialog box appears.

- 2. Click New to open the New Blog Account dialog box.**

- 3. Select Windows Live Spaces.**

- 4. Click Next.**

The New Windows Live Spaces Account dialog box appears.

**5. Type the name of your space — the one you used in the Choose Web Address page — in the Space Name dialog box.**

The name of your space is the word in front of the first dot in the URL of your space. So, if your Spaces URL is `http://thebestblogger.spaces.live.com/`, its name is thebestblogger.

**6. Type the secret word you set up in the Secret Word field.**

The finished form looks a lot like the one shown in Figure 1-10.

**7. Click OK.**

**Figure 1-10:**  
Setting up  
a new blog  
account.



You're also asked whether you want to upload pictures. You can skip this step for now. You can always upload pictures later.

If you did everything right, Word lets you know. If you messed up, you see a message box stating that Word cannot register your account. (Click the More Information button for details.) Figure 1-11 shows the Blog Accounts dialog box with an account properly set up.

**Figure 1-11:**  
The Blog  
Accounts  
dialog box.

Default	Name	Host
<input checked="" type="checkbox"/>	Ryan's space	Windows Live Spaces

## *Publishing Blog Posts*



After you have some edited content and a blog account, you're ready to publish a blog post. You can publish your blog entry by clicking the Publish button on the Blog Post tab on the Ribbon, as shown in the margin.



If your blog host allows you to post to a draft, you can click the little arrow at the bottom of the Publish button and select Publish As Draft.

If you highlight some text and click the Publish button, only the highlighted text is made into the blog entry.

After you click Publish, a message appears on the document, informing you of the success or failure of the post.

Magic? I don't think so. I'm sure it just sent an e-mail from the Word application (which you know it can do) to the Spaces site, and an existing protocol handles that process. It seems like it just magically happens, though, doesn't it?

## *Inserting Hyperlinks and Stuff*

Blogs get their own, cool Insert tab on the Ribbon. At last count, you have the option to add these blog-ready items:

- ◆ Clip art
- ◆ Charts
- ◆ Hyperlinks
- ◆ Pictures
- ◆ Screen shots
- ◆ Shapes
- ◆ SmartArt
- ◆ Symbols
- ◆ Tables
- ◆ WordArt

None of this is new — you can find helpful instructions for using all these useful features elsewhere in this book.



Hyperlinks are especially useful when dealing with blog entries because of the general interlinking nature of blogs and Web pages.



The Insert Hyperlink dialog box looks the same as when it's used in a regular Word document, but it brings special significance to a blog entry. The Browse the Web button (the little magnifying glass with a globe in it) allows you to open a Web browser and begin visiting sites. The URL of whichever page you visit appears in the Hyperlink field.

To use the Hyperlink function, follow these steps:

- 1. On the page, type some text that you want to appear as a link.**
- 2. Select the text with your mouse.**
- 3. Click the Hyperlink button in the Links group on the Insert tab.**  
The Insert Hyperlink dialog box appears.
- 4. Click the Browse the Web button.**  
Your default browser opens.
- 5. Browse to the site that you want the text to link to in the browser.**
- 6. Press Alt+Tab to return to Word.**
- 7. Click the OK button in the Insert Hyperlink dialog box.**

When you publish the page, the hyperlink appears on the blog entry, with whatever style is set in the blog for hyperlinks (such as in blue underlined text).



# Chapter 2: Working with SharePoint

---

## *In This Chapter*

- ✓ Opening and editing SharePoint documents
- ✓ Integrating Word and SharePoint

**P**ut down this book and walk over to your refrigerator. If your fridge is anything like mine, stuck to it are a calendar, a few pictures, and several “essential” papers dotted with what might be spaghetti sauce. The items on your fridge might be different from the ones on mine, but certainly yours are important to you and your family. Microsoft Word uses SharePoint the same way you use your fridge: It sticks important stuff on it so that anyone who needs it can easily access it.

*SharePoint* is the Microsoft platform that enables members of a team to share projects, track the history of all changes made to projects, schedule meetings, and work together in other ways. SharePoint is essentially a Web application that runs on Windows Server (a version of Windows for large organizations), providing a number of services to Internet Explorer and Office users. Although SharePoint is designed for the workplace, any collection of users on a network who are sharing documents can benefit from it, even users who don’t have Office installed. SharePoint is highly customizable, so it’s likely to function any way you want.



This chapter serves as a brief introduction to the Microsoft collaboration platform. For more SharePoint-related information, I recommend *Microsoft SharePoint 2010 For Dummies* by Vanessa L. Williams. This well-thought-out and highly readable book covers a somewhat sophisticated topic. Give it a try.

## *Understanding How SharePoint Documents Are Organized*

Out of the box, SharePoint offers many benefits to groups. Its features are compartmentalized into *WebParts*, which are separate groups of functions, available in several flavors:

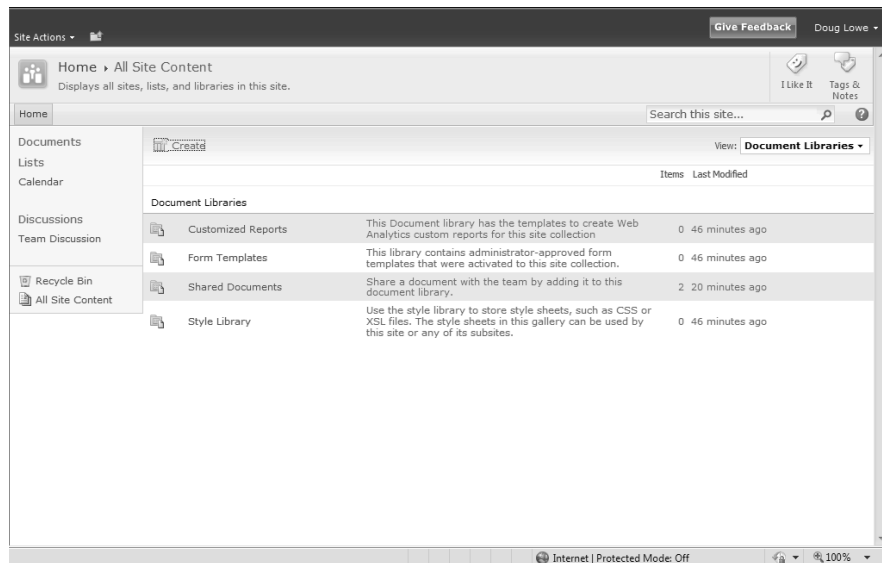
- ◆ **Communications:** All communications functions, such as announcements, contacts, and discussions

- ◆ **Custom Pages:** All SharePoint spreadsheets, data grids, Web pages, and workspaces
- ◆ **Libraries:** All documents, forms, wikis, and pictures
- ◆ **Tracking:** Tools that help you track projects and activities — links, calendars, tasks, issues, and surveys

Integrating SharePoint with Office isn't a trivial activity. This chapter helps you integrate your documents with SharePoint, but getting SharePoint to run is the responsibility of your network administrator.

## *Working with SharePoint Document Libraries*

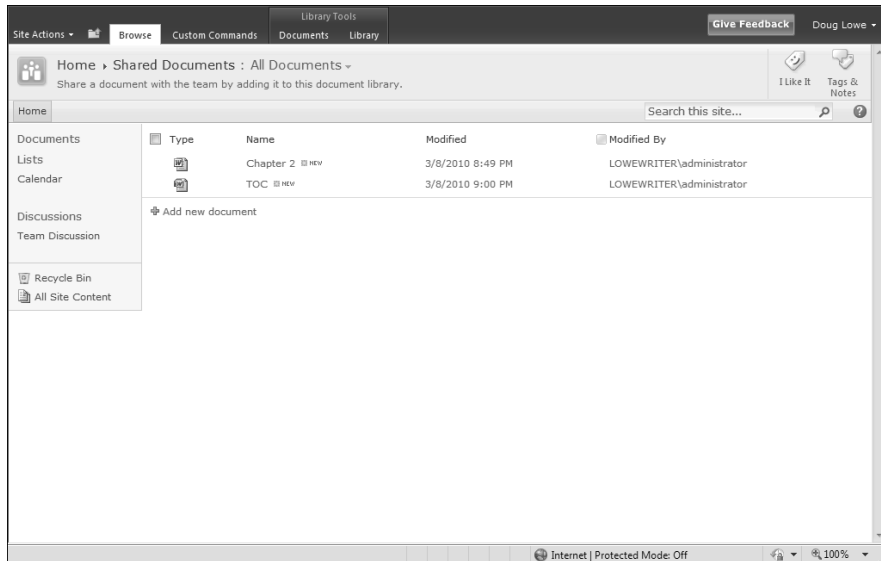
SharePoint lets you organize files into *libraries*, which are roughly equivalent to folders on your own computer. After you have logged in to your SharePoint site, you can view the available document libraries by clicking Documents on the site's home page. SharePoint shows a list of the available document libraries, as shown in Figure 2-1.



**Figure 2-1:**  
SharePoint  
document  
libraries.

From this page, you can easily create a new SharePoint library by clicking Create.

You can click any of the document libraries to display the library's contents. For example, Figure 2-2 shows that the Shared Documents library contains two Word documents.



**Figure 2-2:**  
A library  
with two  
documents.

## *Saving a Document to SharePoint*

You can save a document to SharePoint directly from Word by following these steps:

- 1. Choose File⇨Save & Send⇨Save to SharePoint.**

The Save to SharePoint settings are displayed, as shown in Figure 2-3.

- 2. Click the Browse for a Location button under the SharePoint Locations heading.**

The Save As dialog box appears.

- 3. Type the URL for your SharePoint site in the location field at the top of the Save As dialog box.**

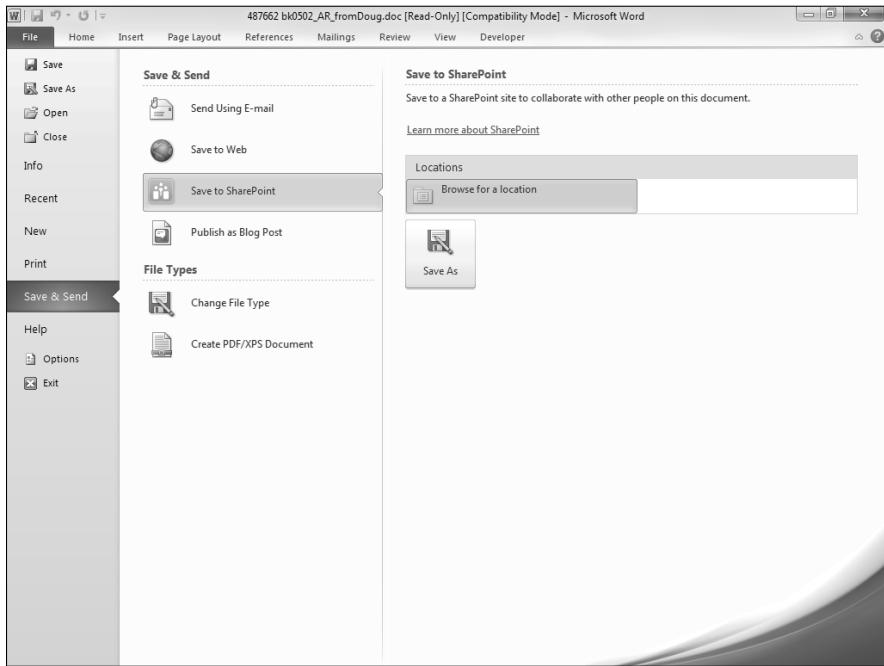
The Save As dialog box displays the SharePoint site, as shown in Figure 2-4.

- 4. Click the library you want to save the document to.**

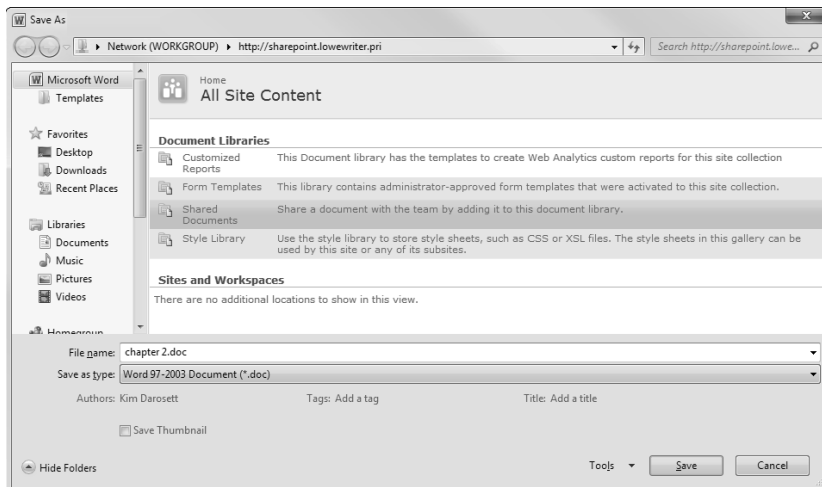
- 5. Click Save.**

The document is saved to the SharePoint site.

**Figure 2-3:**  
The Save to  
SharePoint  
settings.



**Figure 2-4:**  
The Save  
As dialog  
box for a  
SharePoint  
site.

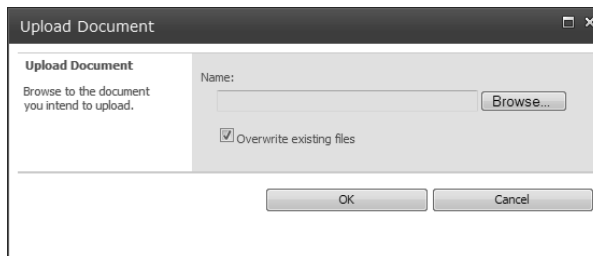


## Uploading a Document to SharePoint

You can upload an existing Word document (or any other type of file, for that matter) to SharePoint by following these steps:

1. In Internet Explorer, browse to your SharePoint site.
2. Open the document library you want to upload the file to.
3. Click Add New Document.

The Upload Document dialog box appears, as shown in Figure 2-5.



**Figure 2-5:**  
Uploading  
a new  
document.

4. Click the Browse button.
5. In the dialog box that appears, select the file you want to upload and then click Open.
6. Click OK.

The file is uploaded to the SharePoint site. Note that this may take a while, depending on the size of the file and the speed of your connection to the SharePoint site.

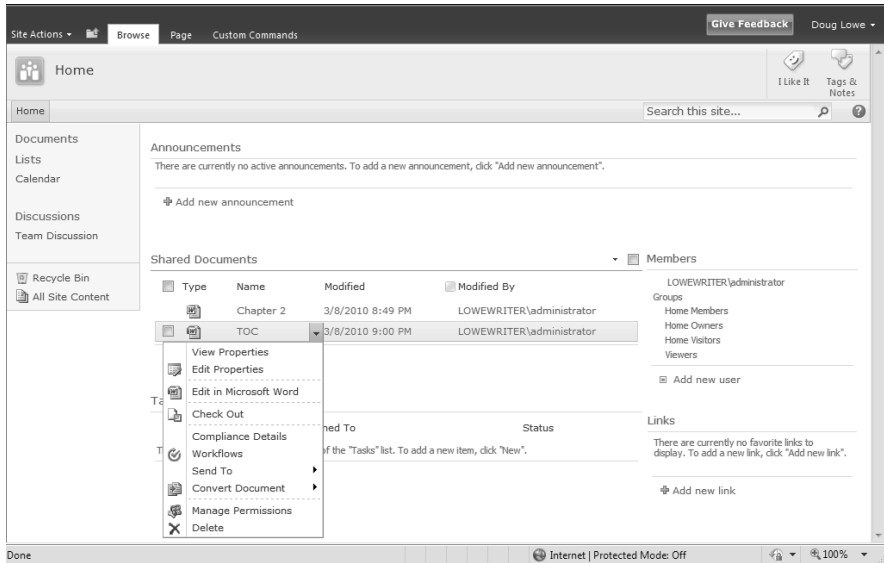
## Opening a Document from SharePoint

The best way to open a document stored on a SharePoint server is to open the file directly from SharePoint. Here are the steps:

1. Open Internet Explorer.
2. Go to the SharePoint home page.
3. Click Documents on the Home page to display the list of document libraries.
4. Click the library that contains the document you want to open.

5. Hover the mouse over the document you want to open to display the down-arrow button, and then click this button to reveal a pull-down menu, as shown in Figure 2-6.

**Figure 2-6:**  
The document pull-down menu.



6. Choose the **Edit in Microsoft Office Word** option.

The file is opened in Word.

7. **Edit the document as usual.**

8. **Save the document as usual.**

When you save the document, it's saved back to SharePoint.



# *Chapter 3: Collaborating with the Review Tab*

---

## *In This Chapter*

- ✓ **Commenting on text**
- ✓ **Tracking editorial changes**
- ✓ **Comparing documents**
- ✓ **Protecting documents**

**I**n writing documents, one of the most significant tasks an author has to perform is to complete the Rite of Review, where people who are generally uninformed about the content of the document change it at will. The Review tab is all about making that process as painless as possible.

The importance of review is accentuated by its having a whole tab all to itself. Buttons for proofing, comment creation and management, change tracking, comparison, and protection all live on the Review tab. The goal is to make easier for everyone involved the process of passing a document through a workflow.

Reviewing isn't new. Word 2003 was riddled with toolbars and commands for reviewing. In Word 2010, all reviewing features are combined on a single Review tab to make them easier to use.

In this chapter, I describe how to manage comments from collaborators, track changes that other people make to your documents, compare two or more documents, and protect documents from accidental changes.

## *Reviewing Documents*

The document review process is one that most organizations don't perform well. Word has a lot of tools that help documents progress through any review process, but in order for them to be effective, you must implement them as part of the process. For instance, a chain of editing for the company newsletter will be much more effective if its editors use the Word reviewing tools.

## Reviewing the agreement

The key to reviewing tools is *agreement* — not on the content of the document *per se* but, rather, on the use of tools. Organizations can effectively route documents by using SharePoint (described in Book V, Chapter 2)

and then manage changes by using comments and track-changes, as long as people agree on using the tools. To get a good start, read this chapter and have your reviewers do the same.

For editing, you can use these two effective tools:

- ◆ **Comments:** Commentary inserted in a document by reviewers without changing its content (which is less intrusive than using track-changes). Think of comments as little notes that editors place in documents. Using this tool is as easy as highlighting a word or sentence or any other object in a document and clicking the New Comment button on the Ribbon. Comments are tracked by user (using initials entered during the setup process) and easily managed by the author.
- ◆ **Track-changes:** Keeps a record of all changes made to a document, allowing you to view the document with all changes highlighted. It's somewhat like taking a red pencil to a printed copy of the document: You can still see the original text, and any changes are highlighted. You can also accept or reject each change, and you can even use built-in tools to view and compare various versions of the document.

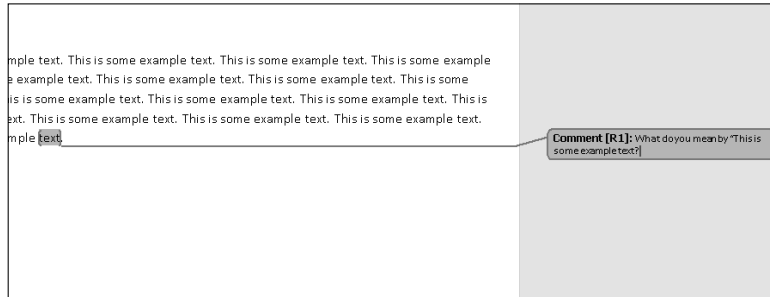
Usually comments and track-changes are used in tandem. Comments are used to suggest changes in tone or content, whereas track-changes are used for editorial changes or directly altering text. I recommend using both at the same time.

## *Working with Comments*

*Comments* are little notes that reviewers can add to your document without disturbing its content. A reviewer can highlight a letter, a word, or a phrase — even an image or an object — and add a box with his initials, a color specific to his comments, and some text, as shown in Figure 3-1.

Comments are clear to read but aren't damaging to the document. They print, and you can save them in a document. Comments don't upset your formatting, and they go all the way back to Word 97, so even if everyone isn't using the same version of Word, they're still useful.

**Figure 3-1:**  
A comment.



## Creating a comment

To create a comment, follow these steps:

1. **Highlight a letter, a word, a phrase, an image, or an object.**
2. **Click the New Comment button in the Comments group on the Review tab, as shown in Figure 3-2.**
3. **Type the comment in the comment box that appears to the right.**
4. **Click elsewhere in the document or continue reading.**

**Figure 3-2:**  
The New  
Comment  
button.



To edit a comment, you can just click inside the comment box and start typing. Comments can't be added to the comment text — though if you click inside the comment text and add a new comment, it's added with the same text selected as the original comment. It's an effective way to make a comment about a comment.

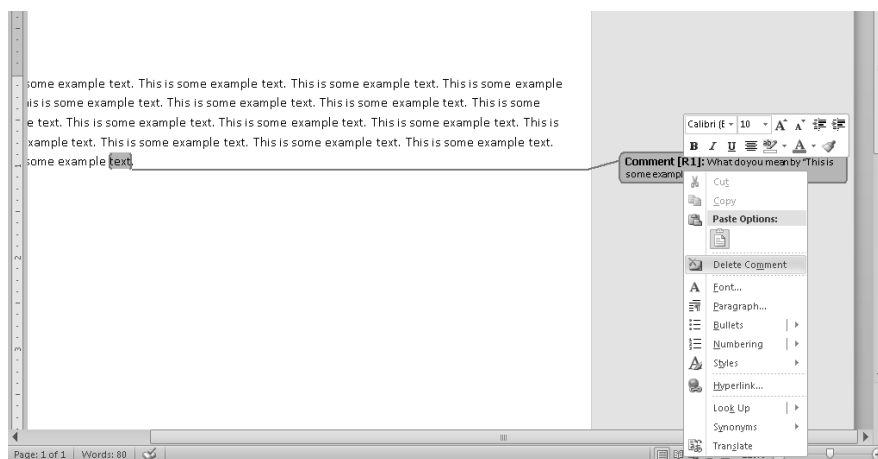
Note that not only are the initials of the reviewer added but the comments are automatically numbered as well. The numbering is helpful for tracking comments, but it's also rather depressing when you scroll to the bottom of the document and notice that a reviewer inserted 134 comments. (I hope you have some caffeine handy.)



If you hover the mouse over a comment, the reviewer's full name (not just initials) and the date and time the comment was created are displayed.

## Deleting a comment

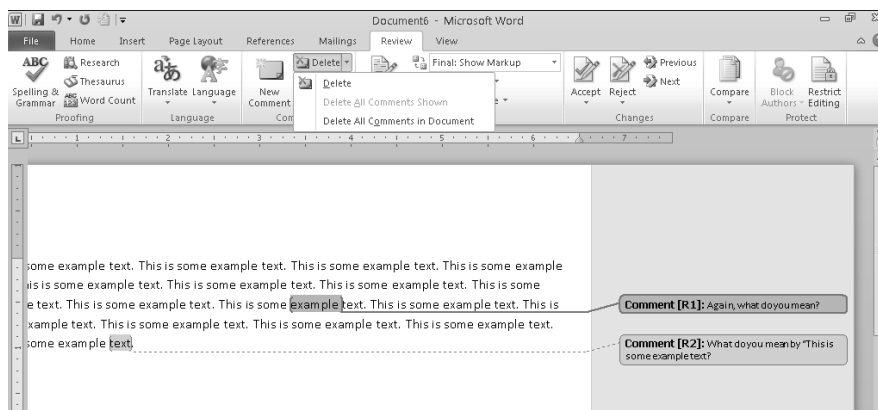
Deleting a comment is a simple, rather fun procedure. After you handle a comment, simply right-click it and choose Delete Comment from the menu, as shown in Figure 3-3.



**Figure 3-3:**  
Deleting a comment.

For the record, when you click a comment to select it, the color becomes darker so that you can see the characters you're deleting.

Additionally, you can use the Delete button on the Review tab on the Ribbon, shown in Figure 3-4. A drop-down menu is available if you click the little black triangle under the Delete button, which allows you to delete all viewable comments or delete all comments.



**Figure 3-4:**  
Using the Ribbon to delete comments.

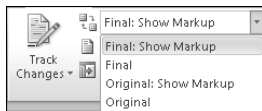
## Viewing comments

At first blush, viewing a comment seems straightforward. However, even a feature as simple as this one has a few options.

Comments appear to the right of their associated text. If you can't see comments, the view mode might be set improperly for viewing.

In the Tracking group on the Review tab on the Ribbon, you can use a drop-down list to set the view mode (see Figure 3-5). By default, it's set to Final: Show Markup, which allows you to see tracked changes. More importantly, this mode shows comments. If the document is set to Final, comments don't appear.

**Figure 3-5:**  
Pay  
attention  
to the view  
mode.



There's a lot more to viewing comments, however. For instance, you can move from one comment to another by clicking the Previous and Next buttons in the Comments group on the Ribbon — as long as comments aren't hidden by the current view mode (refer to Figure 3-5).

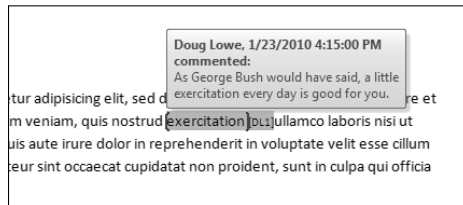
Word has four view modes:

- ◆ **Final: Show Markup:** This is the working mode for reviewing. If your document is in Print Layout view, insertions appear inline and deletions are shown in balloons.
- ◆ **Final:** This view mode shows the document as it will look if you accept all changes.
- ◆ **Original: Show Markup:** If your document is in Print view, deletions appear inline and insertions show up in balloons.
- ◆ **Original:** This mode shows the unchanged document as it will be if you reject all changes.

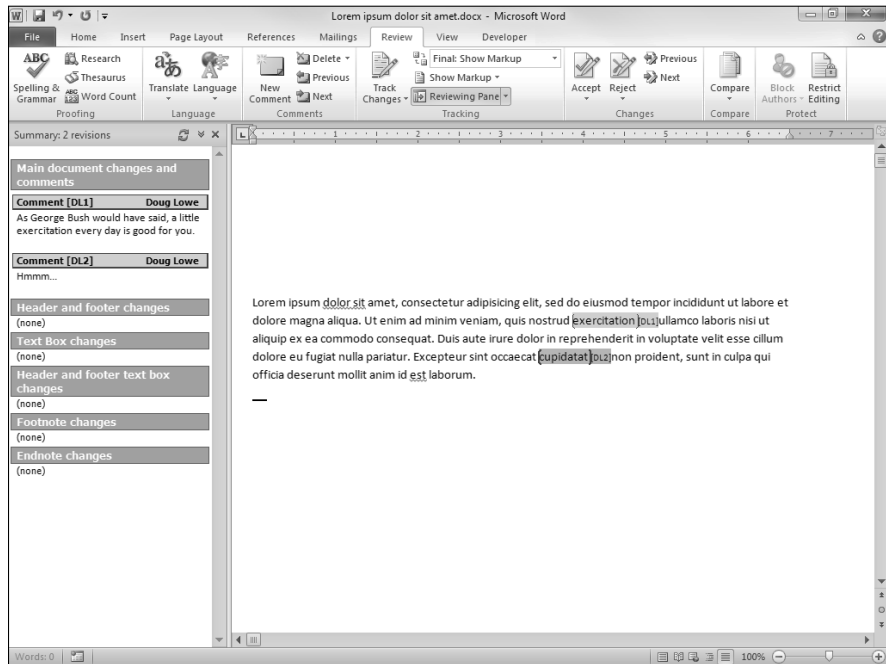
Why use these different modes? Because you can then use the Delete button on the Ribbon or the Delete key on your keyboard to delete the comment. Also, clicking the Ribbon buttons moves the insertion point through the whole document from comment to comment so that you can see the context.

If Word is in Draft view, comments appear differently and the Previous and Next buttons become more important. Comments appear not as notes in Draft view but, rather, as the reviewer's initials in the document, and you have to mouse over them to see comments, as shown in Figure 3-6.

**Figure 3-6:**  
Viewing a  
comment in  
Draft view.



You can also display commands and document changes in the Reviewing pane. To open it, click the Reviewing Pane button on the Review tab. This command displays the Review pane, allowing you as the author to easily change the content of the comments, as shown in Figure 3-7.



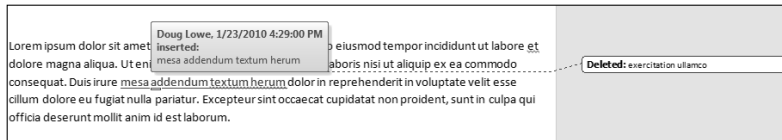
**Figure 3-7:**  
The  
Reviewing  
pane.

## Tracking Changes

More intrusive than comments, track-changes can sometimes be more effective. This feature allows an editor (or several editors) to alter a document while maintaining the integrity of the original.

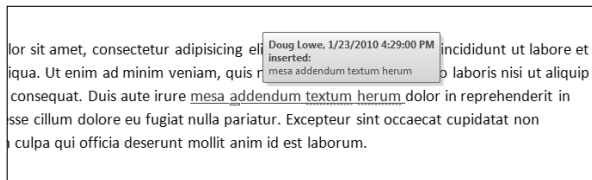
If Word is in Print Layout view, shown in Figure 3-8, the look of deleted text includes a change of color and added strike-through, and added text includes a change of color and underlining. You can switch to Print Layout view by clicking the Print Layout button on the View tab on the Ribbon.

**Figure 3-8:**  
Tracked  
changes in  
Print view.



The text looks much the same if Word is in Draft view (see Figure 3-9). Each editor's changes have a different color.

**Figure 3-9:**  
Tracking  
changes in  
Draft view.



Notice that when you hover the mouse over the change, you see a box with the editor's name, the date and time of the edit, and the edit itself.

All the view options are, well, optional. I go over how to make changes in the "Viewing changes" section, later in this chapter.

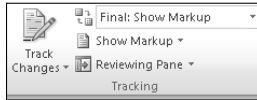


All the track-changes functions you will ever need can be found in the Tracking group on the Review tab of the Ribbon.

## Turning track changes on and off

Track-changes is like a light switch — it's on or off for the entire document. You can use the Track Changes button, shown in Figure 3-10, in the Tracking group on the Ribbon to toggle the status of track-changes.

**Figure 3-10:**  
The Track  
Changes  
button.



You can also press Ctrl+Shift+E to toggle track changes on and off, as it says in the ScreenTip when you point to the Track Changes button. I think I'll just stick with clicking the button.

## *Viewing changes*

You have a lot of options for viewing changes. The default options, which I describe in the previous section, are fine for most uses, but sometimes you need to have a touch more control.

If you click the drop-down button (the little black triangle) under the Track Changes button, you see three options:

- ◆ **Track Changes** turns change tracking on and off.
- ◆ **Change Tracking Options** opens the Track Changes Options dialog box, shown in Figure 3-11.
- ◆ **Change User Name** opens the Word Options dialog box for you to change your username.

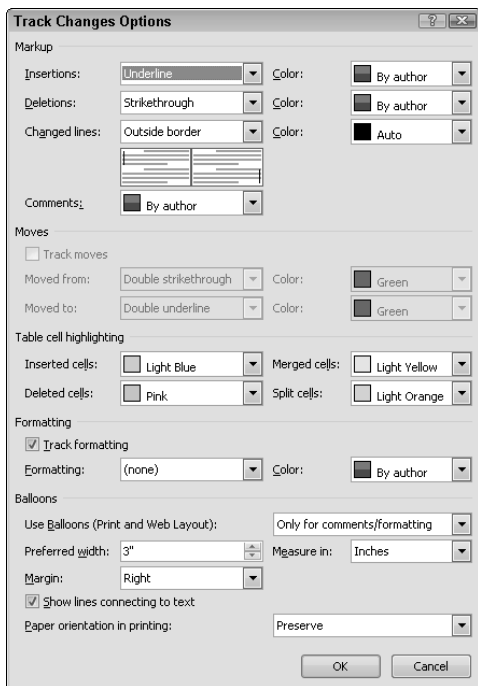
Most options in the Track Changes Options dialog box are self-explanatory. You have the opportunity to have shocking control over the exact color, placement, and positioning of just about every part of the track-changes feature.

More useful is the Show Markup⇌Balloons command in the Tracking group on the Ribbon. This command brings up a list that allows you to toggle the viewing of changes between inline view or balloons without changing the document view mode.

Additionally, you can view only comments and formatting changes in the balloons. That way, the edits show as edits within the document, like an editor would do to a paper document. Comments show as notes on the side of the document, which doesn't interfere with readability.



**Figure 3-11:**  
View  
options for  
tracking  
changes.

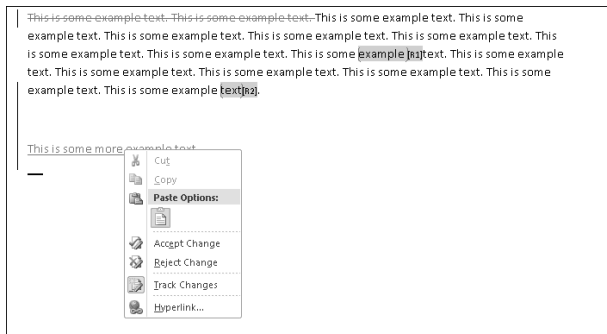


## Accepting or rejecting changes

Tracking changes isn't enough for the people at Microsoft — they even give you the ability to do something about the changes! Accepting or rejecting changes is part of the last step of reviewing: rewrite. After you as the author have received your marked-up document, you can accept or reject changes made by others or yourself.

To accept or reject a change, right-click the change (as either a balloon or an inline change) and you'll see the Accept Change and Reject Change options on the contextual menu, as shown in Figure 3-12.

**Figure 3-12:**  
The  
Tracking  
contextual  
menu.





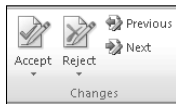
Now you can accept or reject the change. Accepting the change allows whatever changes the editor made to stand, permanently altering the document. Rejecting a change removes it from the document completely.

Comments can't be accepted or rejected. They can only be deleted.

Another slick way to handle changes is by using the Changes group on the Review tab of the Ribbon, shown in Figure 3-13. In that group, you can click the Next and Previous buttons to move between changes in your document. When the change is highlighted, you then click the Accept button or the Reject button, as appropriate. Word then automatically moves to the next change in the document and you repeat the process until you're done.

You can also accept (or reject) all changes in a document by clicking the drop-down list below the buttons. This technique is useful for showing your favorite editors what you really think of them!

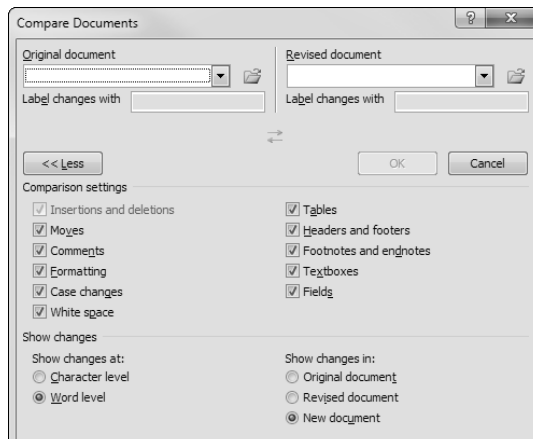
**Figure 3-13:**  
The  
Changes  
group.



## Comparing Documents

Compare Documents is a rarely used and truly cool feature that can help in those situations when reviewing wasn't used and now you have two copies of the document. Simply put, you can pick two documents and this feature marks all the differences for you. The dialog box that holds all the options is shown in Figure 3-14.

**Figure 3-14:**  
The  
Compare  
Documents  
dialog box.



Say for the sake of argument that you have two different documents and you need to see their differences. Here's what you do with them:

1. **Click the Compare button on the Review tab on the Ribbon and choose Compare from the drop-down list.**

The Compare Documents dialog box appears (refer to Figure 3-14).

2. **Use the Browse button (it looks like a little folder with an arrow on top of it) to select the original document in the Original Document field.**
3. **Use the Browse button next to the Revised Document drop-down list to find the document that was edited.**
4. **Pick the options you want to compare.**

You might have to click the More button to see this part of the dialog box.

5. **Click OK.**



When you click the Compare button on the Review tab, the drop-down menu that appears also has a Combine command. This command is similar to the Compare feature, but rather than just compare two versions, it merges edits from both versions into a single document.

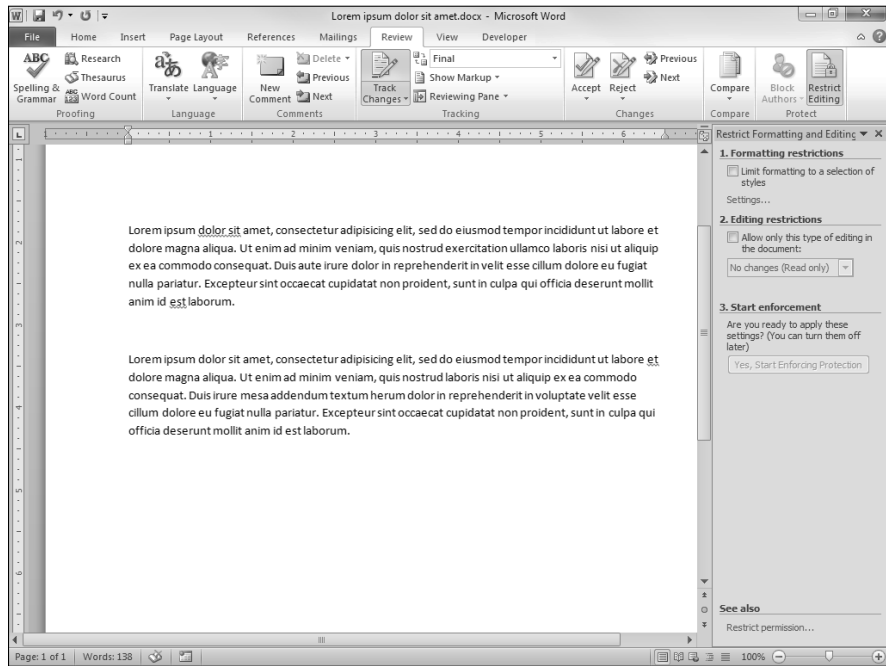
## Protecting a Document

Throughout this chapter, I assume that you, the author, are accepting edits made by someone else, the editor. In reality, anyone can change a document, turn track changes on and off, delete comments, or accept and reject changes — unless you have document protection enabled.

*Document protection* is a suite of tools you use to prevent the document from being used in unauthorized ways. For the purposes of reviewing, it ensures that you have the right to author, and someone else has the right to edit, and that's it.

To protect a document so that it cannot be edited, click the Restrict Editing button in the Protect group on the Review tab. This action displays the Restrict Formatting and Editing tab, as shown in Figure 3-15. On this page you can set the following options:

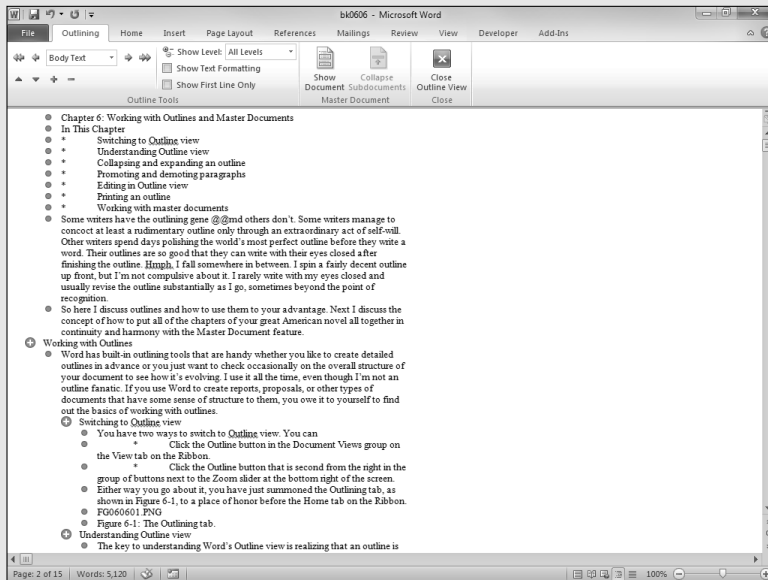
- ◆ You can set the styles to a limited set by selecting the Limit Formatting to a Selection of Styles check box.
- ◆ You can allow only certain kinds of changes by a certain set of users by selecting the corresponding check box.
- ◆ You can enforce those restrictions with either your Windows Login or a document password after you click Yes, Start Enforcing Protection.



**Figure 3-15:**  
Protecting a document.

# Book VI

# Using Reference Features



## *Contents at a Glance*

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# Chapter 1: Creating a Table of Contents or Table of Figures

---

## *In This Chapter*

- ✓ Understanding tables of contents
- ✓ Creating a table of contents
- ✓ Using other styles to create a table of contents
- ✓ Creating a table of figures or other similar tables
- ✓ Updating a table of contents or table of figures

**I**n the old days, creating a table of contents for a book or manual or another long document was a two-step affair. First you created the table of contents, leaving blank spaces or *Xs* where the page numbers eventually would be placed. Then after the pages of the document were in their final form, you browsed the entire document, made a list of the page numbers for each chapter, and reopened the table of contents to replace the *Xs* with the correct page numbers.

Now, assuming that you format your document properly, creating a table of contents is a matter of clicking the mouse button a few times. Word assembles the table of contents for you by using the headings you cleverly placed throughout your document. And Word takes care of the drudgery of counting pages and even adjusts the table of contents for you if you make changes to the document that affect page numbers in the table.

This chapter shows you all the ins and outs of making a table of contents. It also shows you how to create a table of figures or other types of similar tables.



The term *table of contents* is a little cumbersome to use repeatedly throughout this chapter. As a bit of a computer nerd myself, I like using three-letter acronyms (TLAs), so I frequently use *TOC* to stand for *table of contents* in this chapter, if for no other reason than to save ink and paper.

## *Understanding Tables of Contents*

A *table of contents* is simply a list of the headings that appear in a document, typically with the page number for each heading, as shown in Figure 1-1. Word can create a TOC for you automatically based on the heading paragraphs in your document.

**Figure 1-1:**  
A simple  
table of  
contents.

<b>Contents</b>	
Contents .....	1
Understanding Tables of Contents.....	1
Creating a Table of Contents .....	5
Beyond Heading Styles .....	8
Creating a Table of Figures or Other Similar Tables.....	11
Updating Tables of Contents or Figures.....	14

The Table of Contents feature is one of several Word features that depend on the proper use of styles for trouble-free operation. When you create a TOC, Word searches through your document and looks for heading paragraphs to include in the table. How on earth does Word know which paragraphs are supposed to be headings? By looking at the style you assign to each paragraph: You format the heading paragraphs by using heading styles, such as Heading 1, Heading 2, and Heading 3.

If you plan to create a table of contents, make sure that you use heading styles to format your document's headings, especially the headings that you want to appear in the TOC. You should do this anyway, of course, because styles help you format your headings consistently.

Word provides three shortcut keys for applying heading styles:

<i><b>Shortcut Key</b></i>	<i><b>Description</b></i>
Ctrl+Alt+1	Heading 1
Ctrl+Alt+2	Heading 2
Ctrl+Alt+3	Heading 3

If you want, you can tell Word to use different styles to create a TOC. If you format your chapter titles with the Chapter Title style, for example, you can tell Word to include in the TOC any paragraphs formatted with the Chapter Title style. For more information, see the section "Beyond Heading Styles," later in this chapter.

## ***Creating a Table of Contents***

If you assign heading styles to your document's headings, creating a table of contents is easy. Just follow these simple steps:



**1. Move the insertion point to the place where you want the table of contents to appear.**

The TOC generally appears on its own page near the beginning of a document. Press Ctrl+Enter to create a new page if necessary, and then click to position the insertion point on the empty page.

**2. Open the References tab on the Ribbon and then click the Table of Contents button in the Table of Contents group.**

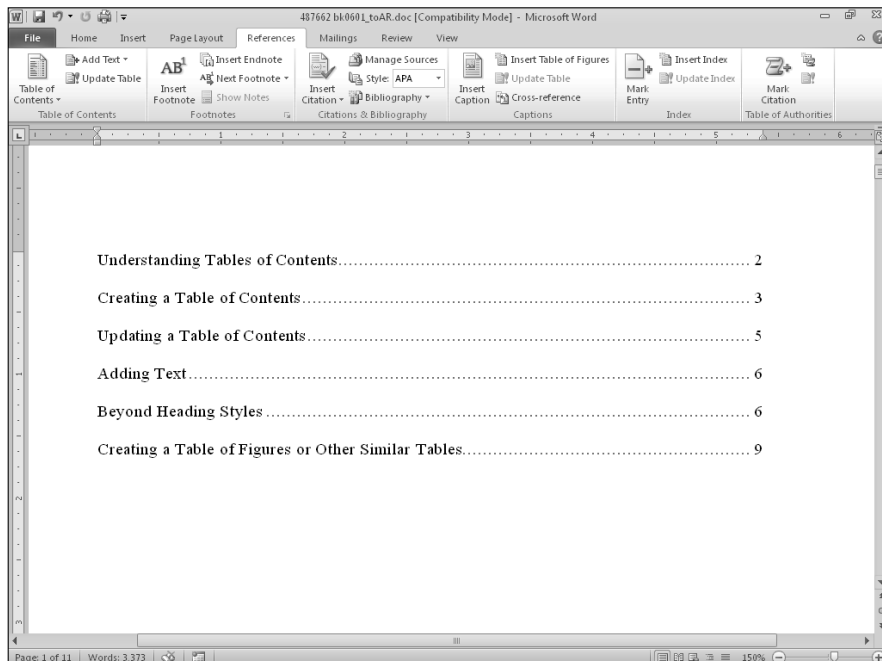
A menu that lists several Table of Contents styles is displayed.

**3. Click the Table of Contents style you want to use.**

The TOC is added to the document, as shown in Figure 1-2. Note that the shaded frame that's drawn around the table of contents is visible only when you hover the cursor over the table. This frame doesn't appear when you print the document.

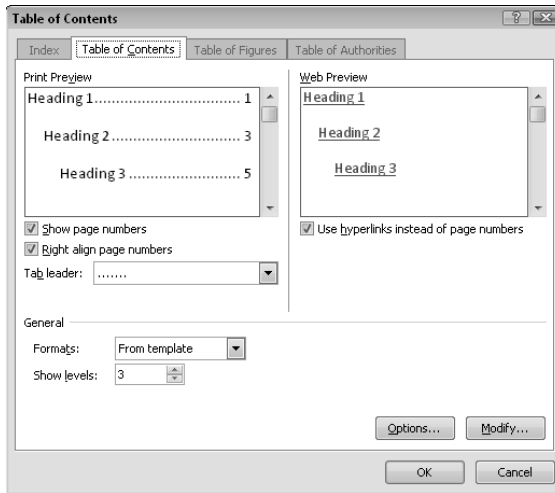
You're done!

If you don't like any predefined tables of contents, you can create a customized TOC by clicking the Table of Contents button in the Table of Contents group of the References tab on the Ribbon and then choosing Insert Table of Contents. This action summons the Table of Contents dialog box, shown in Figure 1-3, from which you can manually choose the options for your table.



**Figure 1-2:**  
A TOC after  
it has been  
inserted into  
a document.

**Figure 1-3:**  
The Table  
of Contents  
dialog box.



The Table of Contents dialog box lets you (among other things) select these options:

- ◆ **Show Page Numbers:** Deselect this check box if you want the TOC to show the document's outline but not page numbers.
- ◆ **Right Align Page Numbers:** Deselect this check box if you want the page numbers placed next to the corresponding text rather than at the right margin.
- ◆ **Tab Leader:** Use this drop-down list to change or remove the dotted line that connects each TOC entry to its page number.
- ◆ **Formats:** Use this drop-down list to select one of several predefined formats for the table of contents.
- ◆ **Show Levels:** Use this control to specify which heading levels to include in the table.
- ◆ **Use Hyperlinks Instead of Page Numbers:** Toggle on/off this option to switch between including page numbers in the TOC (useful for printed documents) and making each TOC entry a live hyperlink to the page of the document being referenced (useful for onscreen documents).

Here are some additional techniques to remember when you compile a TOC:

- ◆ You can make changes directly to a TOC by clicking in the table and typing. However, this idea is a bad one because any changes you make are lost the next time you regenerate the table of contents. See the later section "Updating a Table of Contents" for more information.



- ◆ Unfortunately, Word doesn't add Chapter 1 in front of the TOC entry for Chapter 1. If you want chapter numbers to appear in your TOC, you must include them in the paragraphs formatted with a style that is included in the TOC (such as Heading 1).
- ◆ To delete a TOC, select the entire table and press Delete. Or, click the Table of Contents button on the References tab on the Ribbon. From the menu that appears, choose Remove Table of Contents.
- ◆ Word formats entries in a TOC with a set of standard styles named TOC 1, TOC 2, TOC 3, and so on. If you don't like any of the predefined formats in the Formats list in the Table of Contents dialog box (refer to Figure 1-3), select From Template from the list and click the Modify button. A special version of the Style dialog box, showing only the standard TOC styles, appears. You can then change the appearance of your table by modifying the various TOC styles.

## Updating a Table of Contents

When you create a TOC, Word scans the entire document to determine which entries should be included in the table and which page numbers should be used for each entry. However, after you create the TOC, none of the changes you make to the document are reflected in the TOC. So, if you create a TOC before you're done with the document, the TOC quickly becomes out of date.

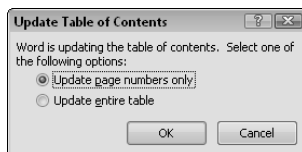
To rebuild a TOC after you make changes, follow these steps:

1. **Select the table and click the Update Table button in the Table of Contents group on the References tab.**

The Update Table of Contents dialog box, shown in Figure 1-4, appears.

2. **Choose whether to rebuild the entire table or update only the page numbers.**
3. **Click OK to update the table.**

**Figure 1-4:**  
Updating  
a table of  
contents.



Here are a few other ways to update a table of contents:

- ◆ Click anywhere in the table and press F9.
- ◆ Right-click the table and choose Update Field from the shortcut menu.
- ◆ Press Ctrl+A to select the entire document and then press F9. Pressing this key updates all tables of contents in the document, in case you have more than one.



Don't forget to save your file after you update the tables.

## *Adding Text*

Sometimes you want a table of contents to include a bit of arbitrary text that hasn't been formatted with a heading style. For example, you might want to add a pointer in the TOC to an important sidebar with a title that isn't styled as a heading. To do so, just highlight the text you want to include in the table and click the Add Text button in the Table of Contents group on the References tab. A menu appears that allows you to select the level where you want the text to appear in the table.



After you add the text, you need to update the table before the text will appear in the table. For more information, see the preceding section, "Updating a Table of Contents."

## *Beyond Heading Styles*

Using the standard heading styles to create a table of contents is convenient but not always your first choice. For example, you might create a document that consists of several chapters and mark the title of each one with a Chapter Title style. Fortunately, Word lets you create a table of contents based on paragraphs formatted with any style you want, not just the standard heading styles.

To create a table of contents by using styles other than the standard heading styles, follow these steps:

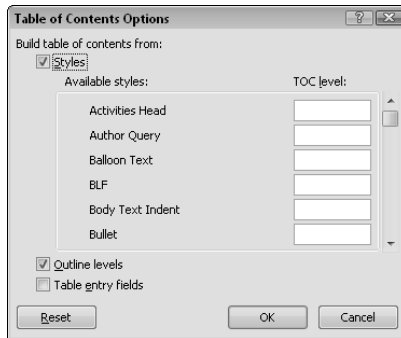
- 1. Click the Table of Contents button in the Table of Contents group on the References tab and then choose Insert Table of Contents.**

The Table of Contents dialog box appears. (Refer to Figure 1-3.)

- 2. Click the Options button.**

The Table of Contents Options dialog box appears, as shown in Figure 1-5. This dialog box lists all available styles in the document and lets you assign a table of contents level to each style.

**Figure 1-5:**  
The Table  
of Contents  
Options  
dialog box.



**3. Adjust the TOC level fields to reflect the styles you want to include in your table of contents.**

The TOC level fields initially are set to include standard heading styles, but that setting is easy to change. To exclude a style from the table of contents, select the style's TOC level field and delete the number in the field. To add a style to the table of contents, choose the style's TOC level field and type the outline level you want that style to represent.

**4. Click OK to return to the Table of Contents dialog box.**

**5. Click OK again to insert the table of contents.**

*Voilà!* You're finished.



Keep in mind the following guidelines when using styles other than the standard style to create a table of contents:

- ◆ The initial settings for the TOC level fields reflect the Show Levels setting in the Table of Contents dialog box (refer to Figure 1-3). If you plan to exclude the standard heading levels from your table of contents, set the Show Levels drop-down list to 1 before opening the Table of Contents Options dialog box. Then you have to clear only the TOC level field for the Heading 1 style.
- ◆ If you mess up the table of contents options, you can click the Reset button to restore the default settings.
- ◆ No rule says that the styles you include in the table of contents all have to appear at different levels. Suppose that you want to include paragraphs formatted with the Chapter Title, Preface Title, Foreword Title, and Appendix Title styles in the table of contents at its top level. No problem. Just type **1** in the TOC level field for each of these styles in the Table of Contents Options dialog box.



## Only a crazy person would use fields to create a table of contents

Because of styles, compiling a table of contents in Word is as easy as pie — as easy as popping a frozen pie in the oven, that is. The table of contents equivalent of baking a pie from scratch is using fields rather than styles to create the TOC. The only real reason to use fields is if you want the text that appears in the TOC to vary slightly from the document text on which you base the TOC. You might want to add the text *Chapter 1* in front of the title for Chapter 1, for example.

To create a TOC from fields rather than from styles, you first must insert special TC fields throughout your document wherever you want a TOC entry created. These TC fields are Word field codes marking the text that will be assembled to create the table of contents.

Here are the painful steps for inserting these fields:

**1. Place the insertion point where you want to insert the TC field.**

For example, place a TC field at the start of each heading in the document.

**2. Click Quick Parts→Field in the Text group of the Insert tab.**

The Field dialog box appears.

**3. Select Index and Tables from the Categories list.**

**4. Select TC from the Field Names list.**

**5. To include text in your TOC, type it in quotation marks in the Text Entry field immediately after the TC field code, as shown in this example:**

Chapter 1: I Am Born

**6. Click OK or press Enter.**

The field is inserted in the document at the insertion point location. It looks something like this:

```
{ TC "Chapter 1: I Am Born" }
```

Word formats it as hidden text, so you might not be able to see it. If you can't, choose File→Options→Display, select the Hidden Text check box, and then click OK.

After you insert all the TC fields, you create the TOC by choosing Table of Contents→Insert Table of Contents in the Table of Contents group on the References tab. Click the Options button and then check the Table Entry Fields check box in the Table of Contents Options dialog box. Click OK to return to the Table of Contents dialog box and then click OK again to compile the table.

## Creating a Table of Figures or Other Similar Tables

Tables of contents aren't the only kind of tables you can create by using the References tab. You can also compile tables of figures, tables of tables, tables of equations, and other, similar collectibles. Chapter 3 of this minibook shows how to use this command to create an index, and Chapter 5 of this minibook shows how to create a table of authorities for legal documents.

The process of creating a table of figures is the same as for creating a table of tables or equations. Follow these steps to create any of these kinds of tables:

1. Select the item to caption, and then on the References tab in the Captions group, click the Insert Caption button.

Figure 1-6 shows the Caption dialog box.

2. Select the type of caption you want to create (Figure, Table, or Equation) in the Label field. Then type the caption in the Caption field. After you finish, click OK.

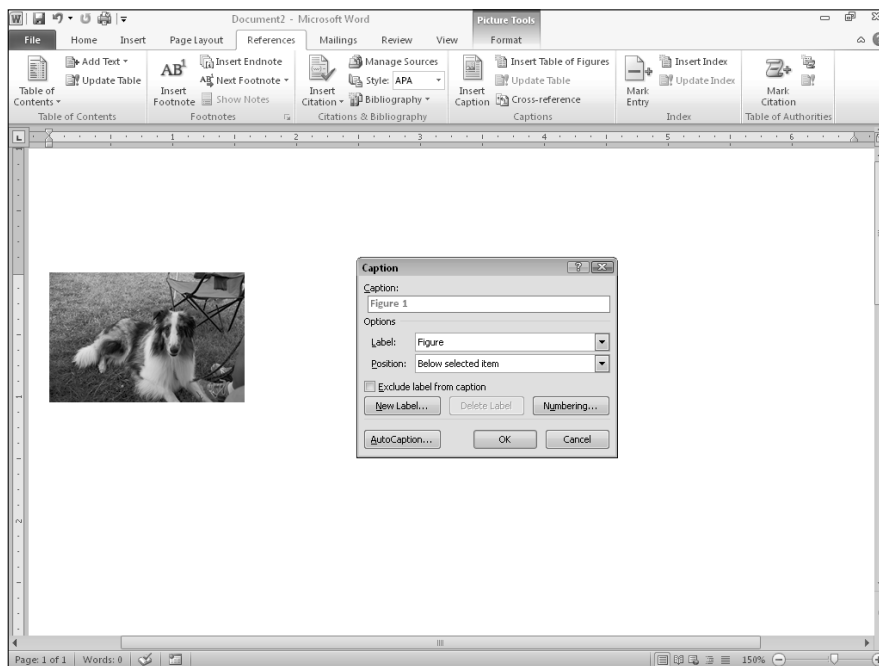
Repeat Steps 1 and 2 for every caption you want to insert.

3. Move the insertion point to where you want to insert the table.
4. On the References tab in the Captions group, click the Insert Table of Figures button.

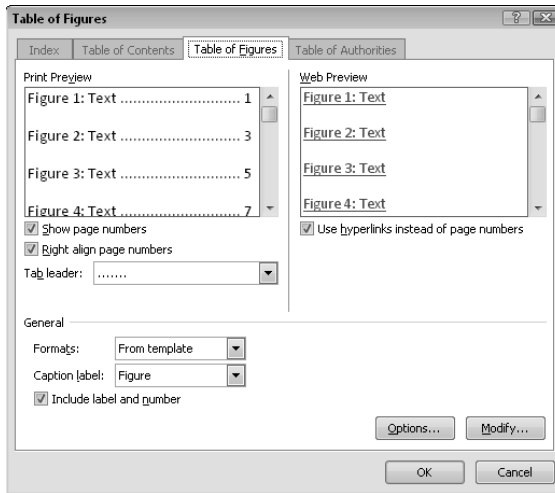
Figure 1-7 shows the resulting dialog box.

5. Select from the Caption Label drop-down list the type of table you want to create.

The Caption Label setting corresponds to the Label setting in the Caption dialog box. To create a table of all figure captions, for example, select Figure from the Caption Label drop-down list.



**Figure 1-6:**  
The Caption  
dialog box.



**Figure 1-7:**  
The Table  
of Figures  
dialog box.

## 6. Select the style you want from the Formats drop-down list.

As you click the various formats, the Print Preview and Web Preview windows show how the resulting table appears.

## 7. Fiddle with the other controls to fine-tune the table's appearance.

- *Show Page Numbers:* Deselect this check box if you want the table to list the captions but not page numbers.
- *Right Align Page Numbers:* Deselect this check box if you want the page numbers placed next to the corresponding text rather than at the right margin.
- *Tab Leader:* Use this drop-down list to add or remove the dotted line that connects each table entry with its page number.
- *Formats:* Use this drop-down list to choose one of several predefined formats for the table of figures.
- *Caption Label:* Use this drop-down list to choose whether to build a table of figures, a table of equations, or a table of tables.
- *Include Label and Number:* Deselect this check box if you want the table to include the caption text (for example, *A Heffalump and a Woozle* or *Ratio of Red M&Ms*) but not the number (for example, Figure 1 or Table 3).

## 8. Click OK.

The table is inserted into the document.





Word is set up to create captions and tables for equations, figures, and tables. If you want to create other types of captions and tables — for limericks or cartoons, for example — you can add items to the list of labels that appears in the Caption and Table of Figures dialog box. On the References tab in the Captions group, click the Insert button. Then click the New Label button. Type a new label (such as Limerick or Cartoon) and click OK. Type the caption text and click OK to insert the first caption of the new type. Later, when you insert the table of figures, the label you created appears in the Caption Label list.

To delete a table of figures, select the entire table and press Delete.

The entries in a table of figures are formatted using a standard Table of Figures style. If you don't like any predefined formats in the Formats list in the Table of Figures dialog box, select From Template and click the Modify button. A special version of the Style dialog box appears, showing only the standard Table of Figures style. You can then change the appearance of your table by modifying the Table of Figures style.



# Chapter 2: Working with Footnotes and Endnotes

---

## *In This Chapter*

- ✓ Adding footnotes
- ✓ Changing the appearance of footnotes
- ✓ Modifying reference marks
- ✓ Changing footnote separators
- ✓ Finding a footnote reference

**F**ootnotes. Back when I was in college, typing them was a major pain in the derriere<sup>1</sup>. You had to count out the lines just right to make sure that you left enough room for the footnote at the bottom of the page. And then you had to figure out how to deal with footnote references that fell too close to the margin to place the note on the same page.

Being able to add footnotes is one of the neatest benefits of word processors, at least if you're in college. After that, the footnote is a useless appendage, unless you happen to work at the college, in which case the footnote feature becomes a source of resentment — just one among many examples of how easy kids have it today. Hmph.

## *Adding a Footnote*

Using footnotes is a snap, unless you want to make them look fancy. Here's the down-and-dirty procedure for adding plain-vanilla footnotes:

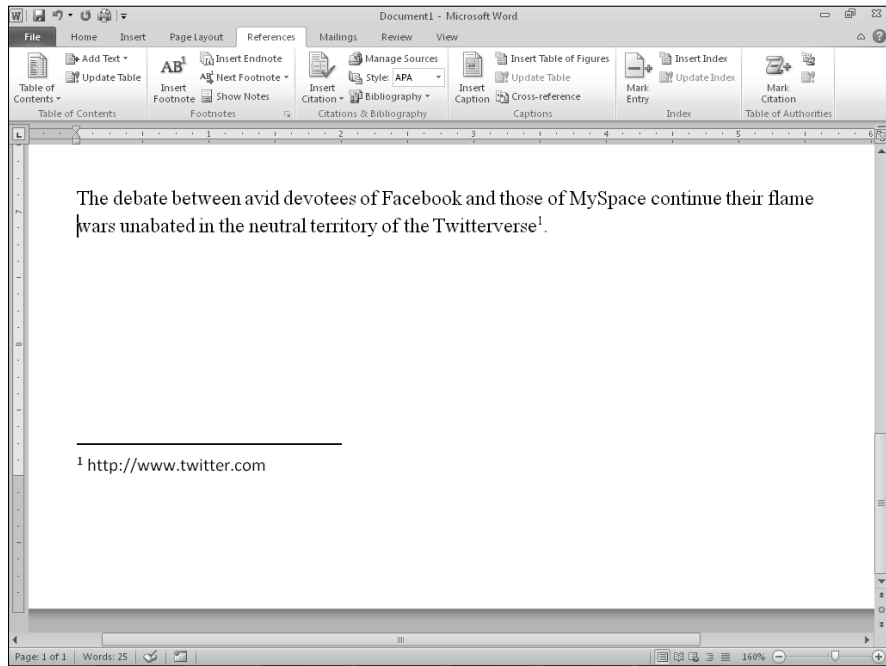
- 1. Place the insertion point where you want the little footnote reference number to appear in your text.**
- 2. On the References tab in the Footnotes group, click the Insert Footnote button.**

The footnote reference is added to the text, and the footnote itself is placed at the bottom of the page.

- 3. Type the footnote.**

Figure 2-1 shows what a completed footnote looks like.

<sup>1</sup> *Hind part; rear appendage; stern.*



**Figure 2-1:**  
A footnote.

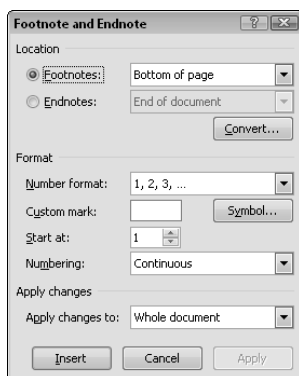


Word automatically numbers footnotes for you. Heck, that's the point. When you insert a footnote, Word adds a little footnote reference number in the text and pairs it with a number in the footnote itself. If you go back later and insert a new footnote in front of an existing one, Word automatically juggles the footnote numbers to keep everything in sync.

Here are a few tips for working with footnotes:

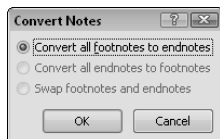
- ◆ For an extra-quick way to create a footnote, use the keyboard short-cut Ctrl+Alt+F. It says “Go directly to the footnote. Do not display the Footnote and Endnote dialog box; do not collect \$200.”
- ◆ To create an *endnote* instead of a footnote, click the Insert Endnote button instead of the Insert Footnote button. *Endnotes* are similar to footnotes, but appear all together at the end of the document (or section, if the document has multiple sections) instead of at the bottom of each page.
- ◆ For more control over endnotes and footnotes, open the Footnote and Endnote dialog box by clicking the dialog box launcher in the lower-right corner of the Footnotes group on the References tab. See Figure 2-2.

**Figure 2-2:**  
The  
Footnote  
and Endnote  
dialog box.



- ◆ If you start with endnotes but then decide that you want to convert them to footnotes (or vice versa), fear not. Just open the Footnote and Endnote dialog box and click the Convert button. The Convert Notes dialog box opens, as shown in Figure 2-3. Then click OK to convert your footnotes to endnotes. Click Close to dismiss the Footnote and Endnote dialog box.
- ◆ To delete a footnote, select its footnote reference number in the text and press Delete.

**Figure 2-3:**  
The Convert  
Notes dialog  
box.



## Changing the Footnote Format

The formatting of footnotes is governed by the Footnote Text style. You can change the appearance of all footnotes in your document by simply modifying the Footnote Text style. (Refer to Book II, Chapter 3 for information about modifying styles.)

Similarly, you can format footnote reference numbers by using the Footnote Reference style. It's a character style, so it doesn't affect formatting for the entire paragraph.

The initial setting for footnote text is Normal + 10 point. Therefore, footnotes are formatted in the same font that's in Normal paragraphs except that they're 10-point regardless of the Normal text size. If you want your

footnotes to appear in a different font or size from the rest of the document, change the font or size for the Footnote Text style.

The initial setting for footnote references is Default Character Format + Superscript. As a result, footnote reference numbers print using the same font as the rest of the text in the paragraph, except that the superscript attribute applies. If you want to see footnote references in a different font, all you have to do is change the Footnote Reference style.

Both footnote text and footnote references automatically apply when you create footnotes, so you should have no reason to apply these formats directly.

### *Changing the Reference Marks*

Most footnotes are numbered 1, 2, 3, and so on, but Word enables you to change this standard numbering format to use letters, Roman numerals, or the special reference symbols \*, †, ‡, and §.

Follow these steps to change reference marks:

- 1. Summon the Footnote and Endnote dialog box by clicking the dialog box launcher in the lower-right corner of the Footnotes group on the References tab.**

The Footnote and Endnote dialog box is shown earlier in this chapter, in Figure 2-2.

- 2. Select a number format.**

This list shows your choices:

1, 2, 3 . . .  
a, b, c . . .  
A, B, C . . .  
i, ii, iii . . .  
I, II, III . . .  
, †, ‡, § . . .

- 3. Click Apply.**



All footnotes in a section must use the same numbering scheme. You can't mix and match.

If you choose the special symbols \*, †, ‡, and § for your reference marks, Word doubles them, if necessary, to create unique reference marks. The first

four footnotes use the symbols singly. The mark for the fifth through eighth notes are \*\*, ††, ‡‡, and §§. After that, the symbols are tripled.

To keep this doubling and tripling of symbols in check, select the Restart Each Page option in the Note Options dialog box. That way, the mark for the first note on each page is always an asterisk (\*). Otherwise, you end up with reference marks such as §§§§§§§§§§, which look silly.



To keep this doubling and tripling of symbols in check, select the Restart Each Page option in the Numbering drop-down list of the Footnote and Endnote dialog box. For example, you can specify that an asterisk (\*) mark all footnotes. If you want to enter a symbol that's not readily available from the keyboard, click the Symbol button and select the symbol you want from the resulting Symbol dialog box.

## Finding a Footnote Reference

To quickly find the reference mark for a particular footnote or endnote, follow these steps:

1. **Click the Home tab, and in the Editing group, choose Find↔Go To.**

Or, press Ctrl+G. You see a dialog box that isn't worthy of a separate figure.

2. **In the Go To What list box, select Footnote or Endnote.**
3. **In the Enter Footnote Number text box, type the number of the footnote you want to go to.**

If the notes are numbered with reference symbols (\*, †, ‡, and §), type the corresponding number (1, 2, 3, and so on).

4. **Click Go To and then click Close.**

There it is.

Or, for an even easier method, click the Select Browse Object button, located near the bottom of the scroll bar on the right edge of the document window. Then choose one of these buttons from the pop-up menu that appears:



- ◆ Browse by endnote
- ◆ Browse by footnote

The double-headed up- and down-arrow buttons that appear above and below the Select Browse Object button change so that they go to the previous and next footnote or endnote, respectively.





# Chapter 3: Indexing Your Masterpiece

---

## *In This Chapter*

- ✓ **Marking index entries**
- ✓ **Creating an index**
- ✓ **Updating an index**
- ✓ **Marking a range of pages**
- ✓ **Creating subentries**
- ✓ **Creating cross-references**

**I**f all you ever use Word for is to create one- and two-page memos on mundane subjects such as how to clean the coffeemaker, you can skip this chapter. After all, you don't need an index for a two-page memo on coffeemaker cleaning unless you work at the Pentagon. If, on the other hand, your memo turns into a 200-page policy manual on appliance maintenance, an index may well be in order.

As luck has it, Word just happens to have a most excellent indexing feature that can help you with the tedious task of indexing. It doesn't create the index for you automatically, but it does help you identify which words to include in the index, and, without much complaining, Word compiles and formats the index from the words you mark.

Creating an index is a three-stage affair. First, you must mark all phrases within your document that you want to appear in the index. Second, you go to the Index group on the References tab and click the Insert Index button to create the index. This command sorts alphabetically all the words and phrases you mark and then combines identical entries. Third, you carefully review the index, lament that Word didn't do a better job, and fix what you can.



I've indexed quite a few books in my day, and I have yet to find a word processor with an indexing feature that truly does the trick. Word is no exception. It can gather index entries for you, but it can't organize them or make sure that you create your index entries with any degree of consistency. It does a better job than any other word processor I've had the pleasure of working with, but you should still be prepared to do a ton of work yourself.

You can mark the words you want to include in an index in two ways: manually, marking each word one by one; or automatically, giving Word a list of words you want in the index and letting it mark the words in the document. First I show you the manual way and then, later in the chapter, I show you the automatic way (in the section, “Isn’t There an Easier Way?”).

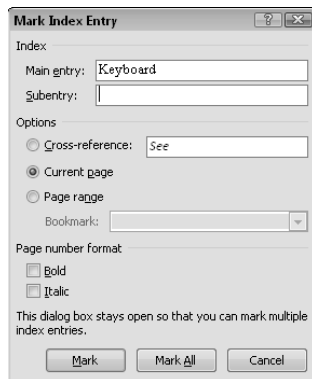
## *Mark Those Index Entries*

The first — and most important — task in creating an index is to mark the words or phrases you want to include in the index. The most common way to do that is to insert an index marker in the document at each occurrence of each item you want to appear in the index.

To mark index entries manually, follow these steps as long as you can stay awake:

1. **Open the document you want to index.**
2. **Select the word or phrase you want in the index by using the mouse or the keyboard.**
3. **Press the keyboard shortcut Alt+Shift+X.**

Alt+Shift+X is one of Word’s more memorable keyboard shortcuts, to be sure. It opens the Mark Index Entry dialog box, shown in Figure 3-1.



**Figure 3-1:**  
The Mark  
Index Entry  
dialog box.

4. **Double-check the content in the Main Entry field. If it’s correct, click the Mark button. If not, correct it and then click Mark.**

The text doesn’t have to appear in the index exactly as it appears in the document. You may highlight an abbreviation to include in the index, for example, but then edit the Main Entry field so that the full spelling of the word, rather than its abbreviation, appears in the index.

**5. To index an entry under a different word, type the alternative entry in the Main Entry field and click the Mark button again.**

For example, you might want to create an entry for “mutt, mangy” in addition to “mangy mutt.”

**6. Mark any additional index entries by highlighting them in the document and clicking the Mark button.**

The Mark Index Entry dialog box works somewhat like the Spelling dialog box in the way it stays onscreen so that you can efficiently mark additional index entries. So, while the Mark Index Entry dialog box remains visible, you can select the text for another index entry and then click Mark to mark it. You can keep indexing for as long as you have the energy.

**7. After you mark each of the index entries you want, click the Close button in the Mark Index Entry dialog box.**

The index entries are marked with special codes formatted as hidden text so that you can’t normally see them and they don’t print. They are there, however, waiting to be counted when you create the index.



Here are some timely tips for preparing index entries:

- ◆ The most efficient way to create an index is after you write and edit your document. Set aside some time to work through the document by using the Mark Index Entry dialog box. Don’t bother to create index entries as you write your document; it just slows you down and distracts you from your primary task: writing.



- ◆ Another way to summon the Mark Index Entry dialog box is to open the References tab on the Ribbon and then click the Mark Entry button in the Index group. (This button is shown in the margin.)

- ◆ If, while marking index entries, you come across a word or phrase that you know occurs elsewhere in your document, click the Mark All button in the Mark Index Entry dialog box. By clicking the Mark All button, you create an index entry for not only the selected text but also any other occurrence of the selected text within the document.



- ◆ Each time you mark an index entry, Word activates the Show All Formatting Marks option, which reveals not only the hidden text used to mark index entries but also other characters normally hidden from view, such as field codes, tab characters, spaces, and so on. This behavior is normal, so don’t be surprised when it happens. To return your display to normal, just click the Show/Hide button in the Paragraph group of the Home tab (shown in the margin).

- ◆ Index entries look something like this: { XE "mangy mutt" }, formatted as hidden text. You can edit the index entry text (the part between quotation marks) if you want to change an index entry after you create it.

## Creating an Index

After you mark the index entries, the process of generating the index is relatively easy. Here are the steps:

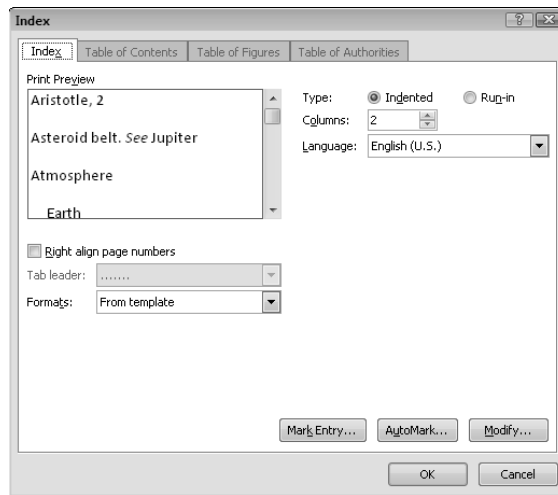
1. **Move the insertion point to the place where you want the index to appear.**

The index generally begins on a new page near the end of the document. Press Ctrl+Enter to create a new page if necessary, and click to position the insertion point on the empty page. You might want to add a heading, such as Index, at the top of the page.



2. **Open the References tab on the Ribbon and then click the Insert Index button found in the Index group. (This button is shown in the margin.)**

The Index dialog box appears, as shown in Figure 3-2.



**Figure 3-2:**  
The Index  
dialog box.

3. **Select the index style you want from the Formats drop-down list.**

As you click the various formats, the Print Preview area shows how the resulting index will appear.

4. **Play with the other controls on the Index tab to fine-tune the index.**

- *Type*: Place index subentries on separate indented lines (Indented) or run together (Run-in).
- *Columns*: Set the number of columns you want in the index. Two is the norm.

- *Language:* If you have multiple language options installed in Word, you can select the language to use in this drop-down list.
- *Right Align Page Numbers:* Select this check box if you want the page numbers placed at the right edge of the index.
- *Tab Leader:* Change or remove the dotted line that connects each index entry to its page number. You can remove the dotted line only when you select the Right Align Page Numbers option.
- *Formats:* Choose one of several preset formats for the index. Or, you can specify From Template to use styles in the document's template to determine the formatting for the index.

#### 5. Click OK.

The index is inserted into the document.



If you see the index's field code (`{ INDEX \r \h "A" \c "2" }`) rather than the index itself, right-click the index field code and choose Toggle Field Codes.

To delete an index, select the entire index and then press Delete.

The entries in an index are formatted with a set of standard styles named Index 1, Index 2, Index 3, and so on. If you don't like any predefined formats listed in the Formats list in the Index dialog box, select From Template in the Formats drop-down list and then click the Modify button. A special version of the Style dialog box appears, listing only standard Index styles. You can then change the appearance of your index by modifying the various Index styles.

## Updating an Index

Whenever you edit your document, you run the risk of messing up the index. Even a slight change can push text from the bottom of one page to the top of the next and possibly invalidate the index. Fortunately, this section gives you several ways to keep your index up-to-date.

Choose File⇨Options to open the Word Options dialog box. Select the Display tab and then check the Update Fields Before Printing in the Printing Options section and click OK. Word automatically updates the index every time you print your document.



To update an index without printing the document, click inside the index and press F9. If you point to the index and right-click, the shortcut menu that appears includes an Update Field command. Using this command works the same as pressing F9 or clicking the Update Index button on the References tab.

## Marking a Range of Pages

If a particular topic is discussed for several pages in your document, you might want to create an index entry that marks a range of pages (for example, 26–29) rather than each page individually (26, 27, 28, 29).

Unfortunately, the procedure for marking page ranges isn't as slick as it could be. You have to mess around with the Word doohickey known as a bookmark. A *bookmark* is a name you can assign to a selection of text. You usually use bookmarks to mark locations in your document so that you can return to them later, but they have all sorts of more interesting uses. Marking a range of pages for an index is just one.

To use a bookmark to create a range of pages in an index, follow these steps (this process gets tricky, so hang on to your hat):

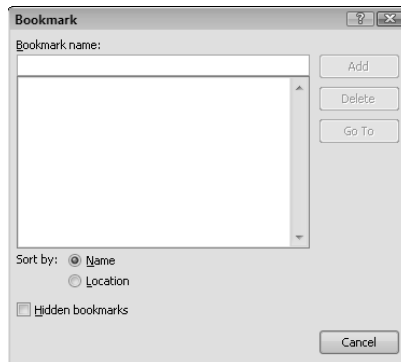
1. **Highlight the entire range of text you want included in the index entry's page range.**

A long discussion of a single topic could go on for pages, so be prepared.



2. **Open the Insert tab on the Ribbon and click the Bookmark button, found in the Links group. (This button is shown in the margin.)**

The Bookmark dialog box appears, as shown in Figure 3-3.



**Figure 3-3:**  
The  
Bookmark  
dialog box.

3. **Type a bookmark name to identify the bookmark.**

Bookmark names can be as long as 40 characters and can consist of any combination of letters and numbers. Spaces aren't allowed, but you can use an underscore to double as a space.

4. **Click Add to create the bookmark.**

5. **Position the insertion point at the beginning of the bookmark and press Alt+Shift+X.**  
The Mark Index Entry dialog box appears.
6. **Type the text you want to appear in the index in the Main Entry field.**
7. **Select the Page Range option.**
8. **Select the bookmark you just created from the Bookmark drop-down list box.**  
All bookmarks in the current document appear in this drop-down list.
9. **Click the Mark button to create the index entry.**

After you create the bookmark and an index entry naming the bookmark, the index includes the range of page numbers for the entry.

The location of various bookmarks in your document can be indicated by large brackets in the text. To activate these brackets, open the Word Options dialog box by clicking File⇨Options. Then select the Show Bookmarks option in the Show Document Content section of the Advanced tab.



Make the bookmark name as close to identical to the index entry text as you can. Use underscore characters rather than spaces: master\_document for master document, for example.

## Creating Subentries

You include a *subentry* when a word is used for two different meanings or serves as a category organizer for several related words. For example, you might want to create an index entry that looks like this:

crew

Kirk, James T., 15

McCoy, Leonard H., 16

Scott, Montgomery, 16

Spock, Mr., 17

Here, the index entries for Kirk, McCoy, Scott, and Spock are all subentries of the main entry: crew.

To create index subentries, you follow the procedure for marking index entries, which I explain earlier in this chapter. You type text for both the main entry and the subentry, however, in the Mark Index Entry dialog box. Each of the preceding index entries, for example, has crew for the Main Entry field and the individual crew member's name as the subentry.



You can create a subentry directly in the Main Entry field by typing the main entry, a colon, and the subentry. For example, type **crew:Kirk, James T.** to create *Kirk, James T.* as a subentry of *crew*.

## *See Also*

A *cross-reference* is one of those annoying messages signaling that you're about to embark on a wild goose chase:

crew, see cast.

To create a cross-reference, begin by marking an index entry as you normally do. On the Mark Index Entry dialog box, select the Cross-Reference option and then type some text in the accompanying text box. Word automatically merges the cross-reference with other index entries for the same text.

## *Isn't There an Easier Way?*

Yet another way to create index entries is to use an *AutoMark file*, which is simply a list of the words that you want Word to include in the index. Word then creates an index entry for each occurrence of each word in the list. Sounds like a great timesaver, eh? It is, sometimes — if you do a good job of creating the AutoMark file in the first place.

Here are the steps:

- 1. Create a new document for the word list.**
- 2. Type the list of words you want to index, each on its own line.**

For example:

Kirk  
Spock  
McCoy  
Scotty

- 3. (Optional) If you want the text in the index to be different from the text in the document, press the Tab key and then type the text exactly as you want it to appear in the index.**

For example:

Kirk	Kirk, James T.
Spock	Spock, Mr.
McCoy	McCoy, Leonard H.
Scotty	Scott, Montgomery



**Note:** You can have more than one line referring to the same index entry. For example:

McCoy McCoy, Leonard H.

Bones McCoy, Leonard H.

4. **Save the word list document by clicking the Save button on the Quick Access toolbar.**
5. **Close the word list document.**
6. **Open the document you want to index.**
7. **Click the Insert Index button in the Index group of the References tab.**  
The Index dialog box pushes its way to the front.
8. **Click the AutoMark button.**  
A dialog box similar to the Open dialog box appears.
9. **Find the file you saved in Step 4, choose it, and click Open.**
10. **Hold your breath while Word adds the index entries.**  
If your word list or the document is long, adding the index may take a while. Be patient.
11. **Select the index and press F9 to update your index with the marks added in Step 10.**

It's done.

After you create the automatic index entries, you probably want to work your way through the document by creating additional index entries.

Unfortunately, the AutoMark option doesn't account for running discussions of a single topic that span several pages. It results in index entries such as *Vogons, 14, 15, 16, 17, 18* that should read *Vogons, 14-18*. So you have to manually fix this type of problem.



When you use tabs to separate the keywords used to locate the items to index and the text you want inserted in the index for those items, keep in mind that the tab stop positions in the word list document don't matter.



If you want, you can use Word's Table feature to create the word list. Create a two-column table and use the first column for the text to find in the document and the second column for the text to include in the index.

Word sometimes refers to the word list as a *concordance*. Just thought you'd want to know.



# Chapter 4: Citations and Bibliographies

---

## *In This Chapter*

- ✓ Creating reference citations
- ✓ Working with sources
- ✓ Creating a bibliography

**I**f you're a student or an academic, you'll love the new Citations and Bibliography feature of Word 2010. This feature lets you create a list of sources, add references to those sources throughout your document, and automatically generate a bibliography that lists all sources referenced in the document.

Best of all, these tools can generate the references and the bibliography in one of ten different standard formats, including most commonly used formats such as APA, Chicago, and MLA, as well as more obscure formats such as GOST and Turabian.

And — get this — if you copy a citation from a document that uses MLA and paste it into a document that uses Chicago, the citation automatically changes to Chicago! (Where was this program when I was in college? Kids these days don't appreciate anything.)

The bad news — or good news, if you're a teacher — is that Word still can't do your research for you. You still have to scour stacks and stacks of books to find the perfect source. But when you find it, Word helps you cite it in the correct format.

## *Creating References and Sources*

The first time you create a reference from a particular source, you can create a citation and enter the source data so that Word remembers it for future use. To create a citation for a new source, follow these steps:

### **1. Click at the location where you want to insert the citation.**

Usually, this location is at the end of the sentence that refers to the source.



2. Use the Style drop-down list in the Citations & Bibliography group of the References tab to select the bibliography format. (This control is shown in the margin.)

You can select one of these formats:

- APA
- Chicago
- GB7714
- GOST — Name Sort
- GOST — Title Sort
- ISO 690 — First Element and Date
- ISO 690 — Numerical Reference
- MLA
- SIST02
- Turabian

Wow! Can you believe Word has so many formats? The most commonly used formats on college campuses in the United States are APA, Chicago, and MLA.



3. Click the Insert Citation button in the Citations & Bibliography group on the References tab (shown in the margin).

This step reveals a drop-down menu with the following options:

- Add New Source
- Add New Placeholder

4. Choose Add New Source.

The Create Source dialog box, shown in Figure 4-1, appears.

**Figure 4-1:**  
The Create  
Source  
dialog box.

## 5. Use the Type of Source drop-down list to select the source type.

You can enter bibliographic information for these types of sources:

- Art
- Article in a Periodical
- Book
- Book Section
- Case
- Conference Proceedings
- Document from Web Site
- Electronic Source
- Film
- Interview
- Journal Article
- Miscellaneous
- Patent
- Performance
- Report
- Sound Recording
- Web Site



The fields that appear in the Create Source dialog box change depending on the source type you select. For example, the Create Source dialog box for a book includes fields for the book's author and publisher. For a film, fields for the performer's and director's names are included.

## 6. Enter the bibliographic information in the dialog box.

For a book, you enter the author, title, year, city, and publisher. You probably want to have the book with you to enter this information correctly.



You can select the Show All Bibliography Fields check box to expand the Create Source dialog box to include additional fields. For most bibliographies, the basic fields are sufficient, so you can safely ignore this check box.

## 7. Click OK.

The source information is added to Word's database of bibliographic sources, and a reference to the source is added to the document.



You're done! At least for this source. If you have other references and sources, repeat this procedure. And when you're ready, you can create the bibliography as described in the section "Creating a Bibliography," later in this chapter.

Here are a few additional pointers for creating references and sources:

- ◆ After you have created a source, that source appears on the drop-down menu for the Insert Citation button. To create another reference to the same source, just click the Insert Citation button and choose the source you want to cite.
- ◆ If you want to create a reference but you don't yet know the details, click the Insert Citation button and choose Add New Placeholder. Enter a name for the placeholder and click OK. You can then enter the details, as described in the section "Managing Your Sources," later in this chapter.
- ◆ When you insert a citation, the citation itself becomes an object that you can select and edit. When you select (or click inside) a citation, an arrow appears next to the citation; you can click this arrow to reveal a menu that lets you edit the citation itself or edit the source information. On that same menu, you can convert the citation to static text and update the citation field. You can also delete the citation by selecting it and pressing Delete.

## *Creating a Bibliography*

After you mark all citations in your document, you can easily create a bibliography that references the citations in the correct format. Here are the steps:

- 1. Click at the location where you want to insert the bibliography.**

It's usually at the end of the document.



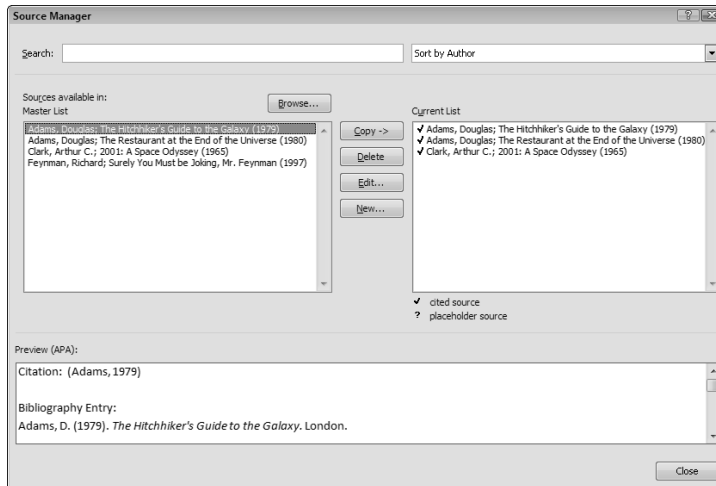
- 2. Click the Bibliography button in the Citations & Bibliography group of the References tab (shown in the margin) and then choose Insert Bibliography.**

The bibliography is inserted. That's it!

The bibliography is formatted according to the style selected from the Style drop-down list in the Citations & Bibliography group of the References tab.

## *Managing Your Sources*

Word keeps a list of all the sources you create, for not just the current document but, rather, all documents. You can manage this list by clicking the Manage Sources button in the Citations & Bibliography group on the References tab. This action opens the dialog box shown in Figure 4-2.



**Figure 4-2:**  
The Source  
Manager  
dialog box.

As you can see, this dialog box presents two lists of sources. The list on the left is the master list of all sources you have created, in any document. The list on the right is the list of sources to include in the bibliography for the current document. Any sources you have referenced in the current document are included in the current list.

Here are a few interesting things you can do with this dialog box:

- ◆ Add a source to the bibliography for the current document even if the source isn't referenced in the document. To do that, select the source in the master list and click Copy.
- ◆ You can search for sources by using the Search text box.
- ◆ To edit the information for a source, select the source and click the Edit button.
- ◆ Click the New button to create a new source.
- ◆ The Browse button lets you open a different list.





# Chapter 5: 1 Object! (To Tables of Authorities, That Is)

---

## *In This Chapter*

- ✓ Marking citations
- ✓ Creating a table of authorities
- ✓ Updating a table of authorities
- ✓ Adding your own categories

**I**nasmuch as you, hereinafter referred to as the *reader*, have deemed it necessary, appropriate, and befitting to create, prepare, and otherwise compile a table, list, or enumeration of various and sundry citations, references, and quotations from legal authorities and other sources, including, but not limited to, cases, statutes, rules, treatises, regulations, constitutional provisions, and other authorities occurring within and among documents, files, and other materials prepared with the word-processing software known as Microsoft Word 2010, hereinafter referred to as *Word*, now therefore and thereupon I, hereinafter referred to as *I*, agree to provide within this chapter a thorough and comprehensive description, discussion, and presentation of the techniques, methods, and procedures required to prepare such aforementioned tables, lists, or enumerations. In consideration hitherto, so let it be written, so let it be done.

In other words, this chapter shows you how to use Word's Table of Authorities feature. If you're a lawyer or legal secretary, you already know what a table of authorities is. If you aren't, turn to another chapter before it's too late.

Creating a table of authorities is much like creating an index (see Chapter 3 of this minibook). First you mark the citations where they appear within the document. Then you use the Insert Table of Authorities button (in the Table of Authorities group on the References tab) to compile the table of authorities based on the citations you marked. If necessary, you can then edit the table or adjust its formatting. You can also update the table to ensure that all entries are up-to-date.

## Marking Citations

The first step in creating a table of authorities is reviewing the entire document and marking any citations you want to include in the table. Follow these steps:

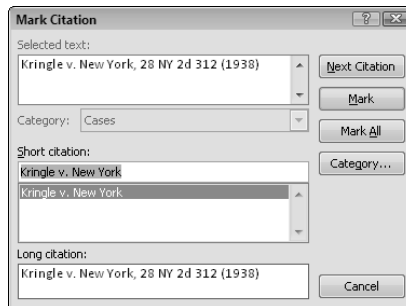
**1. Find a citation you want to mark.**

Start at the beginning of the document and work through the whole thing, marking citations as you go.

**2. Highlight the citation with the mouse or keyboard and press Alt+Shift+I.**

The Mark Citation dialog box appears, as shown in Figure 5-1.

**Figure 5-1:**  
The Mark  
Citation  
dialog box.



**3. Edit the Selected Text field so that it's exactly the way you want the citation to appear in the table of authorities.**

The Selected Text field initially contains the text you selected when you pressed Alt+Shift+I. If the citation in the document doesn't look the way you want it to appear in the table of authorities, click in the Selected Text field and type away. If you want to split the citation into two lines, just position the insertion point where you want the line to split and press Enter.

**4. Edit the Short Citation field so that it exactly matches the way the short version of the citation is used in subsequent references throughout the document.**

The first time you cite an authority, you must provide a complete citation, such as "Kringle v. New York, 28 NY 2d 312 (1938)," but thereafter you use the short form, "Kringle v. New York." Edit the Short Citation field to match the short form of the citation. That way, Word can automatically locate subsequent citations and mark them.

**5. Select the type of authority being cited from the Category drop-down list.**

Word comes equipped with several common categories: Cases, Statutes, Other Authorities, Rules, Treatises, Regulations, and Constitutional Provisions. You can also create your own categories, as described later in this chapter.

**6. Click the Mark button to mark the citation.**

Word inserts a hidden field code to mark the citation. The Mark Citation dialog box stays open onscreen so that you can mark additional citations.

**7. Click the Next Citation button to find the next citation.**

The Next Citation button searches for the next citation in the document by looking for text that's commonly found in legal citations, such as *v.*

**8. Highlight the complete text of the citation found by the Next Citation button.**

The Next Citation button doesn't highlight the complete citation — only the text it finds that convinces it to stop because a citation is probably nearby. Use the mouse to select the citation in the document. (The Mark Citation dialog box patiently stays onscreen while you mark the citation.)

**9. Repeat Steps 3 through 8 until you mark all the citations you can stand.**

**10. After you finish marking citations, click the Close button.**

Word marks citations with field codes formatted as hidden text so that they are normally invisible. These codes jump to life, however, when you compile a table of authorities. See the next section for the steps.



Another way to summon the Mark Citation dialog box is to click the Mark Citation button (shown in the margin). You can find this button located in the Table of Authorities group on the References tab.



If the screen suddenly changes to Print Preview mode when you try to mark a citation, don't panic. You probably pressed Ctrl+Alt+I rather than Alt+Shift+I. Ctrl+Alt+I is the keyboard shortcut for toggling Print Preview on and off. These two keyboard shortcuts are perilously close to one another. If you press the wrong keys, just press Esc to return to Normal view and then start over.

Every time you stumble over a citation that you know occurs later in your document, click the Mark All button. It creates a citation for not only the selected text but also any subsequent occurrences of the citation.



Every time you mark a citation, Word activates the Show All Formatting Marks option. To return your display to normal, click the Show/Hide button (shown in the margin) in the Paragraph group on the Home tab of the Ribbon.

The field codes for citations look like this example:

```
{ TA \l "Kringle v. New York  
28 NY 2d 312 (1938)" \s "Kringle v. New York" \c 1 }
```

The preceding codes are formatted as hidden text, so you don't normally see them. You can edit the long citation text (the part between quotes following \l) or the short citation text (the quoted text that follows \s) if you want to change a citation after you create it.

## Creating a Table of Authorities

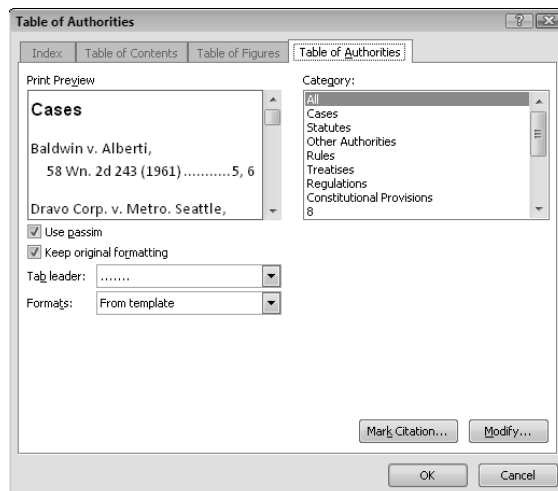
After you mark all citations in your document, follow these steps to create the table of authorities:

- 1. Move the insertion point to the place where you want the table of authorities to appear.**

You can place the table of authorities at the beginning or end of the document. If you want the table to appear on its own page, press Ctrl+Enter to create a page break. You might also want to type a heading, such as **Table of Authorities**.

- 2. Click the Insert Table of Authorities button in the Table of Authorities group on the References tab.**

The Table of Authorities dialog box appears, as shown in Figure 5-2.



**Figure 5-2:**  
The Table of  
Authorities  
dialog box.

### 3. Pick the style you want from the Formats drop-down list.

As you click the various formats, the Print Preview area shows how the resulting table of authorities appears.

### 4. Play with the other controls to fine-tune the table of authorities.

- *Use Passim*: Select this check box if you want Word to use the word *passim* whenever a citation occurs on five or more pages. (The Latin word *passim* means either “scattered throughout,” or “an ugly, overgrown, rat-like creature that hangs upside down by its tail.”)
- *Keep Original Formatting*: Select this check box if you want the character formatting (such as underline and italics) that Word applies to the document’s citation to carry over into the table of authorities.
- *Tab Leader*: Use this drop-down list to add or remove the dotted line that connects each table entry with its page number.
- *Formats*: Use this drop-down list to select one of several predefined formats for the table of authorities.
- *Category*: Use this list box to choose the citation category you want compiled. Usually, you leave the category set to All, the default. If you want to compile a table of one category (cases, rules, and regulations, for example), select the category from the drop-down list.

### 5. Click OK.

The table of authorities is created.

Here are some things to remember when you compile a table of authorities:

- ◆ If the table of authorities looks like { TOA \h \c "1" \p }, right-click it and choose Toggle Field Codes. Alternately, call up the Word Options dialog box (choose File⇨Options), click the Advanced tab, and deselect the Show Field Codes Instead of Their Values check box (found in the Show Document Content section). Click OK, and the table appears correctly.
- ◆ To delete a table of authorities, select the entire table and then press Delete.
- ◆ Word formats the entries in a table of authorities in a standard Table of Authorities style, and the category headings are formatted in the TOA Heading style. If none of the predefined formats in the Formats list tickles your fancy, select From Template and click the Modify button. A special version of the Style dialog box appears, showing only the standard styles used in a table of authorities. You can customize the appearance of your table by modifying the Table of Authorities and TOA Heading styles.

## Updating a Table of Authorities

If you edit a document after creating a table of authorities, the table might become out-of-date. To ensure that the table is up-to-date, use one of these techniques:



- ◆ **Use the Word Options dialog box.** In the Word Options dialog box (choose File⇨Options), click the Display tab, select the Update Fields before Printing check box (in the Printing Options section), and then click OK. Then the table of authorities automatically updates every time you print your document.
- ◆ **Press F9.** To update a table of authorities without printing the document, select (or click inside) the table and press F9.
- ◆ **Use the right-click context-sensitive menu.** If you point to a table of authorities and right-click, the shortcut menu that appears includes an Update Field command. Using the Update Field command works the same as pressing F9.
- ◆ **Click Update Table.** The Update Table button is in the Table of Authorities group on the References tab.

## Adding Your Own Categories

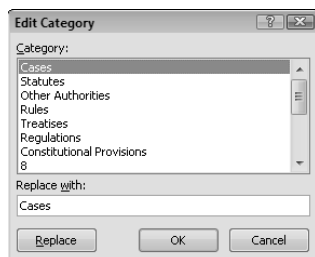
Word comes with seven predefined table of authorities categories: Cases, Statutes, Other Authorities, Rules, Treatises, Regulations, and Constitutional Provisions. If these categories aren't sufficient for your needs, you can add your own. Word has room for as many as 16 categories, and you can either add new categories or replace existing categories with new categories of your choosing.

To create your own categories, follow these steps:

1. **Open the Mark Citation dialog box by pressing Alt+Shift+I. Then click the Category button.**

The Edit Category dialog box appears, as shown in Figure 5-3.

**Figure 5-3:**  
Creating  
a custom  
category.



2. If you want to replace a category, select it in the Category list. If you want to create a new category, scroll past the predefined categories and select one of the dummy categories numbered 8 through 16.
3. Type in the Replace With field the name you want to use for the new category and click the Replace button. Click OK.

When you add your own categories, they appear in the Category drop-down list box in the Mark Citation dialog box. Then you can assign citations to the new category as you mark them.

Note that the categories you create are stored on your computer and not as part of the document. As a result, if you use custom categories, be sure to create them consistently on all computers in your office.

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# *Chapter 6: Working with Outlines and Master Documents*

---

## *In This Chapter*

- ✓ Switching to Outline view
- ✓ Understanding Outline view
- ✓ Collapsing and expanding an outline
- ✓ Promoting and demoting paragraphs
- ✓ Editing in Outline view
- ✓ Printing an outline
- ✓ Working with master documents

**S**ome writers have the outlining gene — others don't. Some writers manage to concoct at least a rudimentary outline only by completing an extraordinary act of self-will. Other writers spend days polishing the world's perfect outline before they write a word. Their outlines are so good that they can write with their eyes closed after finishing the outline. Hmph. I fall somewhere between those two extremes. I spin a fairly decent outline upfront, but I'm not compulsive about it. I rarely write with my eyes closed and usually revise the outline substantially as I go, sometimes beyond the point of recognition.

In this chapter I discuss outlines and how to use them to your advantage. Then I describe how to put the chapters in your Great American Novel all together in continuity and harmony with the Master Document feature.

## *Working with Outlines*

Word has built-in outlining tools that are handy whether you like to create detailed outlines in advance or you just want to check occasionally on the overall structure of your document to see how it's evolving. I use outlining all the time, even though I'm not an outline fanatic. If you use Word to create reports or proposals or other types of documents that have a sense of structure to them, you owe it to yourself to find out the basics of working with outlines.

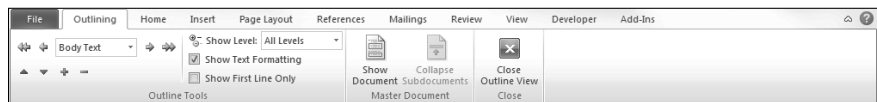
## Switching to Outline view

You have two ways to switch to Outline view. You can

- ◆ Click the Outline button in the Document Views group on the View tab on the Ribbon.
- ◆ Click the Outline button that's second from the right in the group of buttons next to the Zoom slider in the lower-right area of the screen.

Either way you go about it, you summon the Outlining tab, as shown in Figure 6-1, to a place of honor before the Home tab on the Ribbon.

**Figure 6-1:**  
The  
Outlining  
tab.















## Understanding Outline view

The key to understanding Word's Outline view is realizing that an outline is just another way of looking at a document. The outline isn't a separate entity from the document. Instead, when you switch to Outline view, Word presents the headings from your document in the form of an outline. Any changes you make to your document while in Outline view automatically reflect in the document when you return to Print Layout view, and any changes you make in Print Layout view automatically appear when you switch to Outline view. The reason is that Print Layout and Outline view are merely two ways of displaying the contents of your document.

Note some important concepts about Outline view:

- ◆ The outline is made up of the headings and body text of the document. Any paragraph formatted with a built-in heading style (Heading 1, Heading 2, or Heading 3, for example) is considered to be a heading; any other paragraph is considered body text.
- ◆ When you switch to Outline view, a new tab appears on the Ribbon, and the ruler (which isn't needed in Outline view) disappears. This tab, appropriately named the Outlining tab, contains buttons for performing routine outlining tasks. Refer to Figure 6-1 to see the Outlining tab and its groups; I list the buttons used for working with outlines in Table 6-1.
- ◆ When you first switch to Outline view, your document may not appear dramatically different from the way it does in Print Layout view. In the following sections, you see how you view your document quite differently in Outline view from the way you view it in Print Layout view.

- ◆ While Word is in Outline view, you can type new text or edit existing text just as you do in Print Layout view. You can also apply character formatting, such as bold or italic, and you can apply styles to paragraphs. However, it's best not to apply direct paragraph formats, such as indentation, tab stops, and alignment in Outline view, because you can't see the results of those changes there. (They show up when you switch back to Print Layout view.)
- ◆ Outline view has its own set of keyboard shortcuts (which I summarize in Table 6-2) to help you move things along.

Table 6-1 Buttons in the Outline Tools Group		
Button	Button Name	What It Does
	Promote to Heading 1	Promotes selected text to Heading 1
	Promote	Promotes selected text to the next higher heading level
	Outline Level	Sets heading level of selected text
	Demote	Demotes selected text to next lower heading level
	Demote to Body Text	Demotes selected text to body text
	Move Up	Moves selected text up in outline
	Move Down	Moves selected text down in outline
	Expand	Expands selection
	Collapse	Collapses selection
	Show Level	Selects level to be shown
	Show Text Formatting	Shows or hides text formatting
	Show First Line Only	Displays only first line of each paragraph

**Table 6-2**      **Keyboard Shortcuts for Outline View**

<i>Keyboard Shortcut</i>	<i>What It Does</i>
Ctrl+Alt+O	Switches to Outline view
Ctrl+Alt+P	Switches back to Print Layout view
Ctrl+Alt+N	Switches back to Draft view
Alt+Shift+A	Collapses or expands all text
Alt+Shift+- (hyphen)	Collapses the selection
Alt+Shift++ (plus)	Expands the selection
Alt+Shift+1	Collapses or expands to Heading 1
Alt+Shift+(number)	Collapses or expands to specified heading level
/ (on numeric keypad)	Hides or shows formatting
Shift+Tab	Promotes selection
Alt+Shift+←	Promotes selection
Tab	Demotes selection
Alt+Shift+→	Demotes the selection
Ctrl+Shift+N	Demotes selection to body text
Alt+Shift+↑	Moves selection up, similar to cutting and pasting it
Alt+Shift+↓	Moves selection down, similar to cutting and pasting it

## *Showing and hiding formatting*

Before you spend too much time working in Outline view, you may want to hide the formatting from the outline so that you can concentrate more closely on the document's structure. Hiding the formatting in Outline view doesn't remove the formatting from your text; it just temporarily hides it. The formatting in the outline shown in Figure 6-2 is hidden.

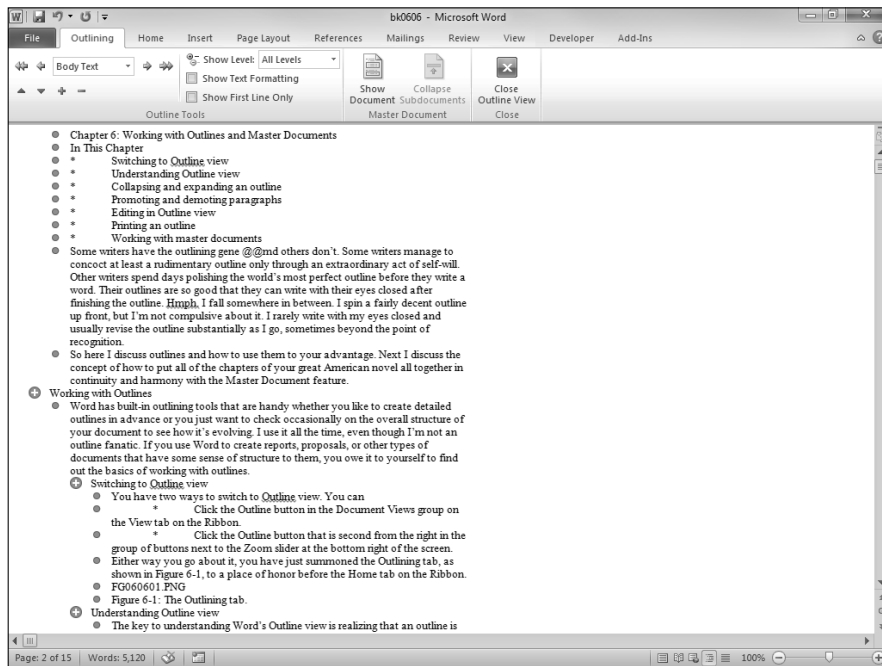
To show the text formatting in the outline, select the Show Text Formatting check box.

Keep these tips in mind when using the Show Text Formatting check box:

- ◆ To hide formatting, deselect the Show Text Formatting check box.
- ◆ You need no formatting to distinguish among heading levels because the headings are indented for you. I usually work in Outline view with formatting turned off.
- ◆ When you hide formatting, you're doing just that — hiding it. You're not removing it. When you deselect the Show Text Formatting check box or return to Print Layout or Draft view, all the formatting you so carefully applied to your document is restored.



**Figure 6-2:**  
Hidden  
formatting.



**Book VI**  
**Chapter 6**

**Working with  
Outlines and Master  
Documents**

## *Collapsing and expanding the outline*

One main reason for working in Outline view rather than in Print Layout or Draft view is so that you can get a handle on the overall structure of your documents. The secret is in collapsing a document's outline so that the portions of your document you're not interested in are hidden.

The Outline Tools group includes a Show Level drop-down list that lets you collapse or expand the entire outline to a specific heading level. For example, if you want to see just the top two heading levels (paragraphs formatted with the Heading 1 or Heading 2 style), select Level 2 in the Show Level drop-down list. Figure 6-3 shows what the document from Figure 6-2 looks like when Level 2 is selected.

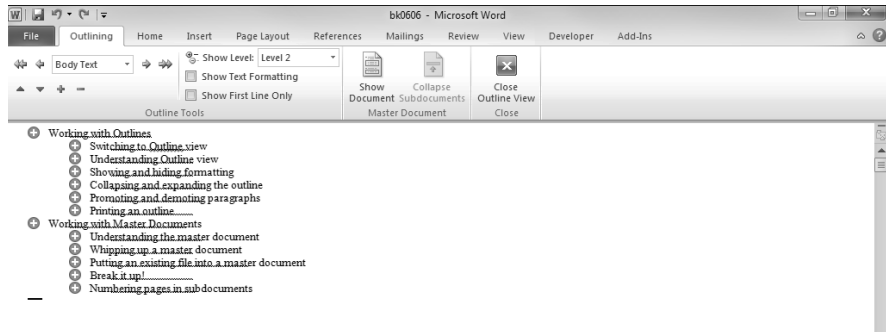
Here are some important features to note about working with collapsed text in Outline view:

- ◆ Some headings have fuzzy lines under them, to represent collapsed body text.
- ◆ Each heading in Outline view has a large plus sign or minus sign next to it. Headings with plus signs have other headings or body text subordinate to them. Headings with minus signs do not.



You can double-click the plus and minus signs to show and hide text.

- ◆ If you're good with keyboard shortcuts, keep in mind that pressing Alt+Shift+A quickly toggles between Show Level 9 and Show All Levels. This handy shortcut quickly shows or hides all body text in an outline.



**Figure 6-3:**  
Level 2  
view of an  
outline.

## *Promoting and demoting paragraphs*



To *promote* a paragraph means to move it up one level in the outline. If you promote a Heading 2 heading, it becomes a Heading 1 heading. You do this by placing the insertion point on the line you want to promote and clicking the Promote button in the Outline Tools group on the Outlining tab on the Ribbon. You can't promote a body text paragraph; it's already as high as it can get. If you promote a body text paragraph, it becomes a heading paragraph at the same level as the heading it is subordinate to. Thus, if you promote a body text paragraph that follows a Heading 2, the body text paragraph becomes a Heading 2.



To *demote* a paragraph is to move the paragraph down one level in the outline. You demote a paragraph by placing the insertion point on the line you want to demote and clicking the Demote button in the Outline Tools group on the Outlining tab on the Ribbon. If you demote a Heading 1 heading, it becomes a Heading 2 heading. Demote the heading again, and it becomes Heading 3. You cannot demote a body text paragraph, but you can demote any heading to a body text paragraph.



You can drag and drop collapsed sections in Outline view to rearrange them. The body text paragraphs that fall under the heading always go along for the ride. You don't need to worry about losing a heading's body text.

## *Printing an outline*

You can't directly print an outline from Word. You can display the outline onscreen, and it seems like it might print, but when you print it, the entire

document prints, not just the Outline view. (Here's a clue: when you choose File→Print and check out the preview, it shows the entire document.) That's because Word prints based on the document itself, not based on the view you are using.

Here's a workaround: Generate a table of contents that includes all the heading levels, and then print just the page(s) of the document that contain the TOC. See Chapter 1 of this book for information about TOC creation.

## Working with Master Documents

Suppose that a great honor is bestowed on you: serving as the moderator of this year's Neat Freaks Convention. As moderator, one of your jobs is assembling a little 1,200-page book titled *Neat Freaks 2010: Proceedings of the Annual Neat Freaks Trade Show and Conference*. Notable Neat Freaks from all across the globe will present papers, and your job is to assemble all these documents into one huge book. Fortunately for you, the International Neat Freak Association (INFA) has adopted Word 2010 as its standard word processor, so each neat freak of note will send you a document on disk. All you have to do is combine the files into a single document and print it.

This job is definitely for Word's Master Document feature. You can use it to create long documents by piecing them together from small documents. Master documents are all confusing and worth figuring out only if you have to do this sort of thing often. If you find yourself needing to read this part of the chapter, I offer my sincerest condolences.



You probably shouldn't tackle master documents until you have a good understanding of Word's Outline view because the Master Document feature is sort of an advanced form of outlining.

### Understanding the master document

A *master document* contains special links to other documents, which are *subdocuments*. If you're putting together a book that consists of 30 chapters, for example, you probably won't put the entire book into one document. Instead, you probably will create a separate document for each chapter. That's all well and good, but you might want to print the whole thing with page numbers that begin at page 1 and run through the end of the book rather than restart at page 1 at the beginning of each chapter. Or, you might want to print a table of contents for the book or create an index.

That's where master documents come in. Using a master document, you create each chapter as a separate document. Then you create a master document for the entire book. In the master document, you create links to each of the chapters or subdocuments and format the text using the style definitions in the master document rather than from the individual documents.

This method provides consistent formatting for the entire final document. Then you can print the entire book, and Word takes care of numbering the pages for you. You can also create a table of contents or index in the master document, and the page numbers automatically adjust.

Word has a separate view for working with master documents (drum roll, please): Master Document view. This view is a variation of Outline view. In *Master Document view*, little icons indicate the portions of the master documents that are subdocuments. You can double-click one of these icons to open a subdocument in a separate window to edit it.

For the most part, you use Master Document view to create a new master document, to change the order in which individual subdocuments appear in the master document, or to add or remove subdocuments. If all you want to do is edit an individual chapter in your book, you just open the chapter document as you normally do, without worrying about it being a subdocument in a master document.

If you open a master document and switch to Draft view or Print Layout view, Word treats the master document and all its subdocuments as though they're a part of one large document. You can scroll through the master document all the way to Chapter 12 and begin typing, for example, or you can choose File→Print to print the entire book, or you can use the Replace button in the Editing group on the Home tab on the Ribbon to replace all occurrences of *WordPerfect* with *Word* throughout the entire document.

You can assemble a master document in three ways:

- ◆ **From scratch:** If you know that you need a master document beforehand, you can create the master document and all its subdocuments from scratch. This technique results in a master document and a collection of empty subdocuments, which you can then open and edit as you see fit. See the section “Whipping up a master document,” later in this chapter.
- ◆ **By breaking up:** If you get part of the way into a project and realize, “Hey! This document is way too long! I should have used a master document,” it’s not too late. You can bust a big document into several smaller subdocuments. See the later section “Break it up!”
- ◆ **By power of assembly:** If you already have a bunch of Word documents that you want to assemble into a master document, you can create a master document by using the existing documents as the subdocuments. See the section “Putting an existing file into a master document,” later in this chapter.





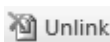


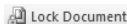
All this talk about master documents is confusing, I’m sure, but it makes more sense when you begin to use them. (I promise.) Just to muddy the waters a little more, the following list shows you some additional notes you need to know about master documents before I jump into the steps for creating and using them:





- ◆ In the master document, each subdocument is contained within its own section. Each subdocument, therefore, can have its own page layout and column arrangement and any of the other niceties that go along with being in your own section.
- ◆ When you click the Show Document button in the Master Document group on the Outlining tab on the Ribbon, the Master Document group expands to display additional buttons specially designed to work with master documents. Table 6-3 summarizes each button's function.
- ◆ Basing the master document and all its subdocuments on the same template works best. Otherwise, trying to figure out which styles, macros, and other template goodies are available is a nightmare.

**Table 6-3 Buttons in the Master Document Group**

<i>Button</i>	<i>Name</i>	<i>What It Does</i>
	Show Document	Switches to Master Document view
	Collapse/Expand Subdocuments	Acts as a toggle to collapse or expand a subdocument
	Create	Creates a new subdocument to be fleshed out later
	Insert	Inserts an existing file as a subdocument
	Unlink	Deletes the link to the selected subdocument
	Merge	Combines two subdocument files into one subdocument file
	Split	Splits a subdocument into two subdocuments
	Lock Document	Locks or unlocks a subdocument

You can open a subdocument in two ways. The first way is to open the master document. Word displays any subdocuments contained in the master document as hyperlinks. To open a subdocument, all you have to do is Ctrl+click the subdocument's hyperlink. Alternatively, you can ignore the master document and open the subdocument file the way you open any other Word document: Choose File→Open to browse for the document.



If you have a network and more than one person is involved with the creation of your documents, Word keeps track of who owns which subdocument, based on the Author Name field of the subdocuments. Before you can edit a subdocument that someone else created, you must unlock it by clicking the Lock/Unlock Document button in the Master Document group on the Outlining tab on the Ribbon.



You can spread the master document and its subdocuments across different folders, and they can even live on different computers if you have a network. Life is much easier, however, if you create a separate folder for just the master document and all its subdocuments. If more than one person is working on the project, place this folder on a shared network hard drive so that everyone involved in the project can access it.

## *Whipping up a master document*

If none of the documents you want to combine by using a master document are created yet, the best way to begin is to create the master document and all its subdocuments at the same time. Then you can open each subdocument individually to fill in the missing chapters of your book.

These steps show you the procedure for creating a master document and its subdocuments from scratch:

1. **Start Word if it isn't already open and choose File⇨New⇨Blank Document⇨Create. Or, press Ctrl+N.**
2. **On the View tab in the Document Views group, click the Outline button.**

The Outlining tab appears on the Ribbon. You can also open Outline view by clicking the Outline button in the lower-right corner of the status bar (it's second to the left of the Zoom slider) or by pressing Ctrl+Alt+O.

3. **Click the Show Document button in the Master Document group on the Outlining tab.**

The Master Document group of the Outlining tab expands.

4. **Create a Heading 1 paragraph for the title of the master document.**

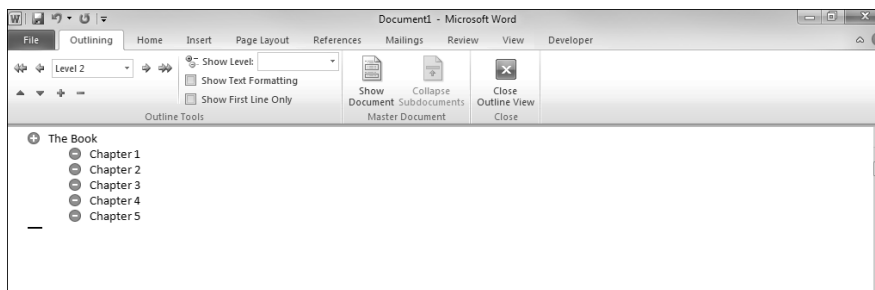
If you're creating a book, for example, type the book's title as a Heading 1 paragraph.

5. **Create a Heading 2 paragraph for each subdocument you want to create.**

If each subdocument represents a chapter, type the chapter titles as Heading 2 paragraphs.

Figure 6-4 shows an example of a master document with a Heading 1 paragraph for the master document title and a Heading 2 paragraph for each subdocument title.

**Figure 6-4:**  
The outline  
for a master  
document.



## 6. Select the Heading 2 paragraphs.

Select them by dragging the mouse over them or by holding down the Shift key while you move the cursor with the arrow keys. Each Heading 2 paragraph you select converts to a separate subdocument in the next step. (Make sure not to select any part of the Heading 1 paragraph at the beginning of the document.)



Create

## 7. Click the Create button in the Master Document group on the Outlining tab.

Clicking this button tells Word to break the selected heading paragraphs into smaller subdocuments.

## 8. Admire your handiwork.

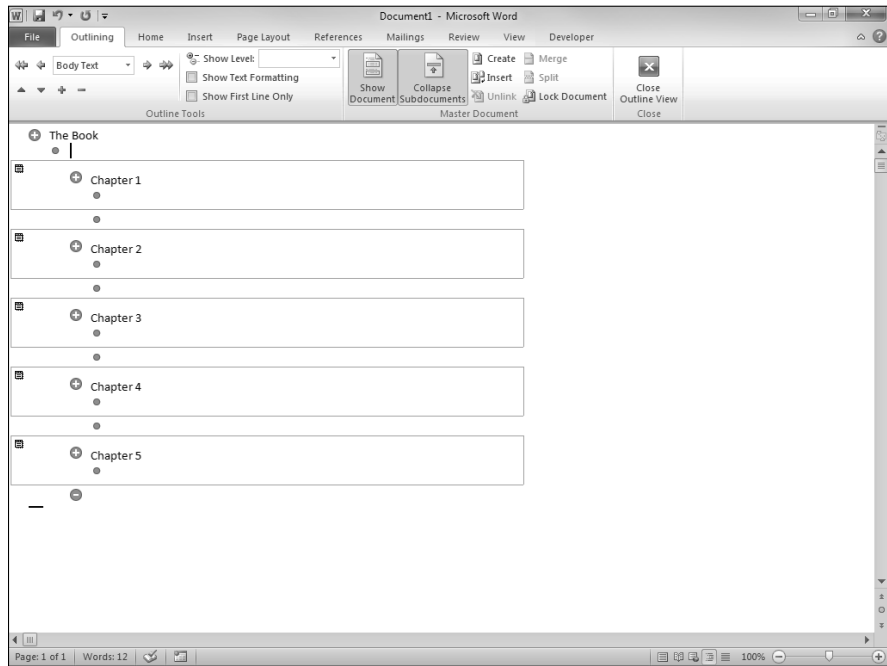
Figure 6-5 shows a document that's been broken up. Notice how Word draws a box around each subdocument and adds a little subdocument icon in the upper-left corner of the box.

## 9. Save the files by choosing File→Save, pressing Ctrl+S, or clicking the Save button on the Quick Access toolbar.

You have to provide the name and location of the master document. Word makes up names for all subdocuments, using the first heading paragraph if possible.

## 10. You're finished.

Well, not quite. All you have is the outline of a book with a bunch of empty subdocuments. You still have to write the chapters!



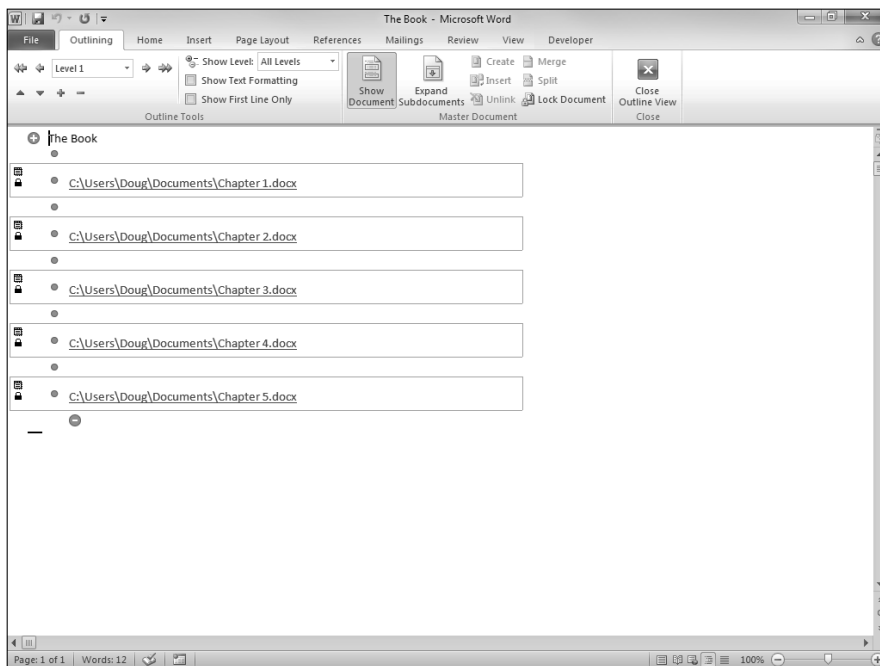
**Figure 6-5:**  
All busted  
up.

Keep a few thoughts in mind when you're creating a master document from scratch:

- ◆ You don't *have* to use the Heading 1 style for the master document title and Heading 2 for the subdocument titles. But doing so makes sense. Word examines the text you selected before you click the Create button to find the first Heading paragraph. Then it creates a separate subdocument for each paragraph in the selected text that's formatted with the same heading style as the first heading. If the first heading paragraph is formatted with the Heading 3 style, Word creates a separate subdocument for each Heading 3 paragraph. Most of the time, using Heading 1 for the master document title and Heading 2 for each subdocument title makes sense. Alternatively, you can use the Title style for the document and then have Heading 1 paragraphs for each subdocument.
- ◆ The subdocuments aren't saved until you save the master document. Then Word automatically saves all subdocuments in the same folder as the master document.
- ◆ After you create a subdocument, you can edit it by double-clicking the little subdocument icon next to the subdocument heading. This action opens the subdocument in a separate window and leaves the master document open in its own window, too. After you finish editing the subdocument, save it and close the window to return to the master document window.



- ◆ When you open an existing master document, subdocuments are shown as hyperlinks, as shown in Figure 6-6. Then, to edit a subdocument, press Ctrl while clicking the link to the subdocument you want to edit.



**Figure 6-6:**  
Hyperlinks.

## *Putting an existing file into a master document*

If you (or your buddies) have already created a bunch of smaller files that you want to combine into one larger publication, you can plug each file into a master document as a subdocument. Then you can create a table of contents or an index for the whole publication or print the publication with uninterrupted page numbers.

Follow these steps to create a master document and insert existing documents into it as subdocuments:

1. **(Optional) Using the My Computer window or Windows Explorer, copy the various files you need into a single folder.**

This step isn't strictly necessary; creating a master document from subdocuments spread throughout your hard drive is acceptable. But life is simpler if the master document and all its subdocuments live together in harmony.

2. **Start Word if it isn't already open and then choose File⇨New⇨Blank Document⇨Create or press Ctrl+N.**

3. **On the View tab in the Document Views group, click the Outline button. Alternatively, press Ctrl+Alt+O.**

The Outlining tab shows up on the Ribbon. You can also open Outline view by clicking the Outline button in the lower-right corner of the status bar. The button is second to the left of the Zoom slider.

4. **Click the Insert button in the Master Document group on the Outlining tab.**

An Insert Subdocument dialog box appears. This dialog box is identical to the Open dialog box except for its name.

5. **Find the file you want to insert as a subdocument, choose it, and click Open.**

The file is inserted into the master document as a subdocument. Word creates section breaks before and after it.

6. **Repeat Steps 4 and 5 for any other subdocuments you want to insert.**

7. **Save the master document by clicking the Save button on the Quick Access toolbar.**

8. **You're finished.**

Here are a few points to ponder when you insert subdocuments into a master document:

- ◆ Inserting a subdocument doesn't change the subdocument file's name or folder location.
- ◆ When you click the Insert Subdocument button, the subdocument is inserted at the position of the insertion point. Make sure that the insertion point is either at the beginning or end of the master document or between two previously inserted subdocuments. If the insertion point is within a subdocument when you click the Insert Subdocument button, the subdocument you select is inserted *within* the subdocument, not within the master document. If you're not careful, you can create subdocuments within subdocuments within subdocuments, kind of like those fancy Russian nesting dolls.



The contents of the subdocument file don't copy into the master document. Instead, a link to the subdocument file is created so that whenever you open the master document, you access the subdocument file also. You can still open the subdocument file separately, apart from the master document.

## ***Break it up!***

Sometimes a project just gets out of hand. It starts out as a half-page memo about where to keep spare pencils and ends up as a 300-page office-procedures manual. You obviously wouldn't use a master document for the

half-page memo (unless you're bored), but somewhere around page 100 you might wish that you had. No problem! Just bust up the big document into two or more subdocuments.

Follow these steps to break a large document into smaller subdocuments:

1. **Open the document.**
2. **On the View tab in the Document Views group, click the Outline button or press Ctrl+Alt+O to add the Outlining tab to the Ribbon.**
3. **Change the headings to make each section of text that you want to become a subdocument begin with a Heading 2 style.**

The most logical thing is to format the document title as Heading 1 and each subdocument as Heading 2. You might have to use the Promote and Demote buttons to accomplish this task. The buttons are in the Outline Tools group on the Outlining tab on the Ribbon. Bother.

4. **Select the range of text you want to convert into subdocuments, beginning with the heading for the first subdocument and ending with the last paragraph of the last subdocument.**



5. **Click the Create button in the Master Document group on the Outlining tab on the Ribbon.**

Word breaks the document into smaller subdocuments based on the heading paragraphs and inserts section breaks before and after each subdocument.

6. **Save your work by using one of the many options (Quick Access toolbar, File→Save, Ctrl+S, or whatever).**

Word saves the master document and all subdocuments. Word retains the name of the original file for the master document and makes up names for the subdocuments, using the text from the first heading in each subdocument if possible.

7. **You're finished!**

Celebrate by taking the rest of the day off.



You can promote or demote all headings in a document by selecting the entire document (press Ctrl+A) and then clicking the Promote or Demote buttons in the Outline Tools group on the Outlining tab on the Ribbon.



One problem that people run into with master-subdocument relationships is that they put section formatting into the master document — you want all content placed in subdocuments and certainly no special formatting in the master document.

## *Numbering pages in subdocuments*

When you use a master document, you can number all pages of your publication consecutively. In other words, the first page of a subdocument is one greater than the last page of the subdocument that precedes it.

These steps show you the procedure:

- 1. Open the master document.**

You can work in Print Layout view or Outline view, but you have to be working with the master document, not with an individual subdocument.

- 2. To add the page numbers to the header, click the Header button in the Header & Footer group on the Insert tab on the Ribbon and then select Edit Header from the drop-down list.**

Word temporarily switches to Page Layout view and adds the Header & Footer Tools Design contextual tab to the Ribbon.

To add page numbers to the footer, choose the Edit Footer option from the drop-down list of the Footer button in the Header & Footer group on the Insert tab on the Ribbon.

- 3. Format the header or footer to include a page number.**

Add or change whatever text you want to include in the header or footer. To add a page number, click the Page Number button in the Header & Footer group (located on the Header & Footer Tools Design contextual tab) and use the options in the drop-down list. Book III, Chapter 1 describes headers and footers in detail.

- 4. Click the Close Header and Footer button in the Close group on the Header & Footer Tools Design contextual tab when you're happy with the header or footer.**

Word returns you to Print Layout or Outline view.

- 5. Print the master document and check its page numbers.**

Pretty cool, eh?



If you want each subdocument to begin on a new page, add a page break to the Heading 2 style's Paragraph format (or whichever style you use for the title of each subdocument). You can find the Breaks drop-down list in the Page Setup group on the Page Layout tab on the Ribbon.



# Book VII

# Mailings

The 5<sup>th</sup> Wave

By Rich Tennant



"They won't let me through security until I remove the bullets from my Word document."

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# Chapter 1: Creating Envelopes and Labels

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## *In This Chapter*

- ✓ Printing on envelopes
- ✓ Creating labels
- ✓ Printing return-address labels
- ✓ Creating a custom label for odd-size labels

**W**ord has a sophisticated mail-merge feature that you can use to print envelopes, labels, and personalized letters from a list of recipient names.

That's not what this chapter is about. If you want to find out how to do mail merges, skip to Chapter 3 of this minibook.

In this chapter, I show you how to use a few relatively simple features of Word 2010. The Envelopes and Labels commands let you create a single envelope or label or an entire page full of labels that are all the same.

## *Printing an Envelope*

Word includes a special Envelopes command that can quickly and professionally print a mailing address (and your return address) on an envelope so that you can stuff your letter into it. You can send the envelope directly to your printer without ever creating a document, or you can add an envelope to an existing document so that you can print your letter and envelope together.

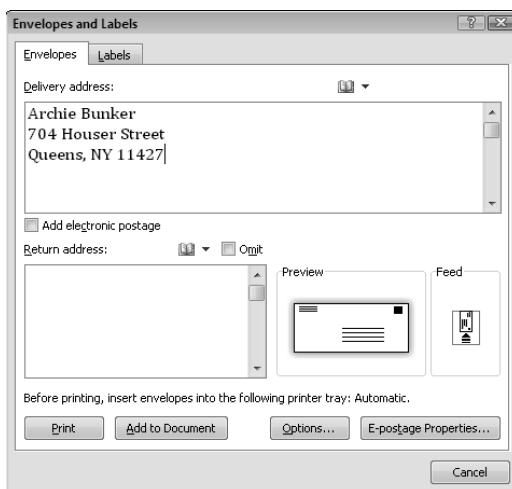
To add an envelope to a letter you already created, open the letter (if it isn't already open) and follow these steps:



1. **Open the Mailings tab on the Ribbon and then click the Envelopes button (shown in the margin) in the Create group.**

The Envelopes and Labels dialog box appears, as shown in Figure 1-1.

**Figure 1-1:**  
The  
Envelopes  
and Labels  
dialog box.



If the current document contains an address, Word sniffs it out and stuffs it into the Delivery Address field automatically. So you might not need to enter the address. Sometimes Word gets lost and can't find the address, so you have to type it yourself.



If the Envelopes and Labels dialog box appears without the delivery address filled in, you can click Cancel to dismiss the dialog box. Then select the recipient's address in the letter and click the Envelopes button again. This time, the address is filled in.

2. **If you want your return address to print on the label, type it in the Return Address text box.**
3. **Click the Add to Document button to add the envelope to the letter.**

The envelope is added to your document as a separate page that appears before the first page of your letter.

When you print the letter, the envelope prints first. So you have to be prepared to insert an envelope into the printer. The exact steps for inserting an envelope depend on your printer. But most printers prompt you to insert an envelope when it wants to print one. Be an obedient printer user and do as you're told.



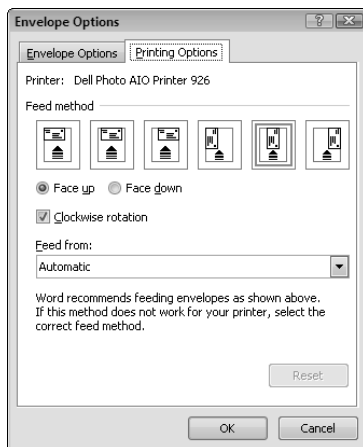
To print an envelope directly without adding it to a document, click the Print button instead of the Add to Document button in Step 3.



If your envelope prints upside down, you might need to configure Word so that it knows how your printer handles envelopes. From the Envelopes and Labels dialog box, click the Options button. When the Envelope Options dialog box appears, click the Printing Options tab to reveal the printing options, as shown in Figure 1-2. Then select the Feed Method options that

correspond to the way your printer accepts envelopes. Click OK to dismiss this dialog box when you're done. Word memorizes these options, so you have to set them only once.

**Figure 1-2:**  
The Printing  
Options  
tab of the  
Envelope  
Options  
dialog box.



## Printing Labels

Word also lets you quickly print labels rather than envelopes. You can use labels in Word in three ways. You can print

- ◆ **Just one label:** You can even tell Word which label on a sheet of blank labels you should print. That way, you don't have to waste an entire sheet of labels just to print one label.
- ◆ **An entire sheet of the same label:** This option is useful for printing return-address labels. I do this approximately once a year, when I send out a few hundred Christmas cards to my inner circle of close and dear friends.
- ◆ **Labels from a database:** This option is a mail-merge topic, so you have to skip to Chapters 3 and 4 of this minibook to find out more about how to do it.

Here are the steps for printing a full sheet of the same label:

### 1. Get some labels.

You can find a huge assortment of labels at your handy office supply store. Pick whichever ones you like, but make sure to get labels that work with your printer.

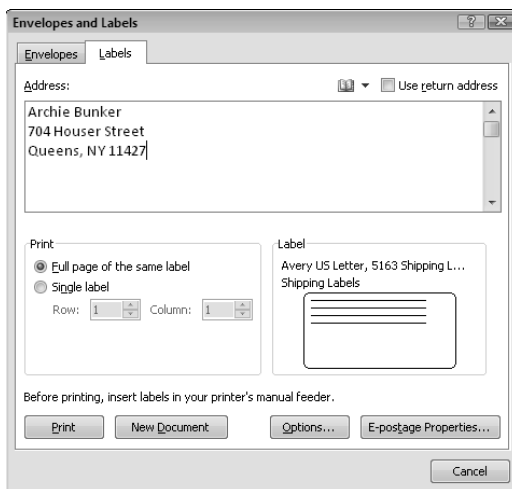
Word works best with Avery labels, but you can buy a cheaper brand, if you want. Most generic labels list the Avery equivalent on the package.



2. **Display the Mailings tab on the Ribbon and then click the Labels button (shown in the margin) in the Create group.**

The Envelopes and Labels dialog box, shown in Figure 1-3, appears.

**Figure 1-3:**  
The Labels  
tab of the  
Envelopes  
and Labels  
dialog box.



3. **Type the address you want to print in the label in the Address text box.**

Naturally, if you're printing labels for something other than addresses (for example, name tags or file folders), you don't actually type an address. Instead, type in this text box whatever you want to appear on each label.

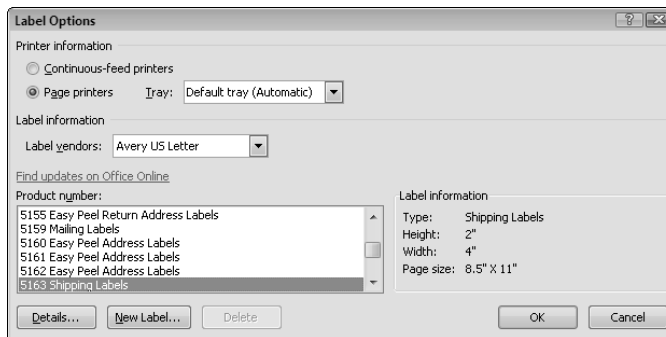


If you have stored your address in Word, you can mark the Use Return Address check box to transfer it automatically into the label. To store your address in Word, choose File⇨Options⇨Advanced and enter it in the Mailing Address box. This is handy if you want to create your own return address labels, for example.

4. **Make sure the right labels are selected.**

The label brand and model number appear in the lower-right corner of the dialog box, in the Label area. If this number doesn't match the number you're using, click the Options button and select the right label type from the Label Options dialog box, shown in Figure 1-4. Then click OK to return to the Envelopes and Labels dialog box.

**Figure 1-4:**  
Selecting  
the label  
type.



### 5. Click New Document.

A new document is created with an entire page of labels, all lined up in a nice table.

### 6. (Optional) If you want to format the labels differently, press Ctrl+A to select the entire document and then apply any formatting you want to use.

For example, you might want to change the font and size to make your text fit better in the space available in the label.

### 7. Insert a sheet of labels in the printer.



Be sure to insert the label with the correct orientation. If you're not sure, try this time-honored trick: Draw an arrow on a plain sheet of paper indicating the direction in which you feed the paper, and then test print the labels on that page. When the page comes out of the printer, make a note of whether labels print on the same side of the page as the arrow or on the opposite side. That helps you determine whether to insert the labels face up or face down. (Printing a test page on plain paper is a good idea before using a sheet of labels anyway.)

### 8. Choose File⇨Print and then click the Print button to print the labels.

That's it; you're done.



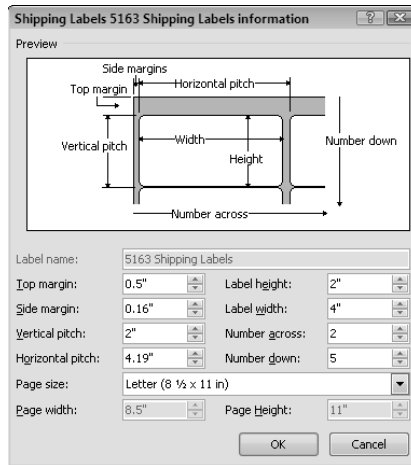
To print a single label, select the Single Label option button after Step 4, and then use the Row and Column controls to specify which label on the page you want to print. For example, to print on the first label in the upper-left corner of a sheet of labels, choose Row 1 and Column 1. Then click Print to print the label. (You can't generate a new document, as in Step 5, when printing only a single label.)

To send the label or labels directly to the printer rather than to a document, click Print instead of New Document in Step 5.

## Creating Custom Labels

If your labels don't appear in the list of predefined labels, you have to create a custom label format. To do so, select a label type that's close in size to the labels you want to create and click the New Label button in the Label Options dialog box. The Label Details dialog box appears, as shown in Figure 1-5.

**Figure 1-5:**  
The Label  
Details  
dialog box.



To set up your custom label, enter appropriate values for each of the fields in this dialog box:

- ◆ **Label Name:** The name for your custom label type.
- ◆ **Top Margin:** The distance between the top of the sheet and the top of the first label.
- ◆ **Side Margin:** The distance between the left edge of the sheet and the left edge of the first margin.
- ◆ **Vertical Pitch:** The distance between the top of one label and the top of the label beneath it.
- ◆ **Horizontal Pitch:** The distance between the left edge of one label and the left edge of the label to its right.
- ◆ **Label Height:** The height of each label.
- ◆ **Label Width:** The width of each label.
- ◆ **Number Across:** The number of labels in each row.
- ◆ **Number Down:** The number of labels in each column.



- ◆ **Page Size:** The size of each sheet of labels, usually 8½ x 11 inches.
- ◆ **Page Width:** The width of the label paper on which you are printing. This will be different than the label width if there are multiple labels per row.
- ◆ **Page Height:** The height of the label paper on which you are printing. This will be different than the label height if there are multiple labels per column.



As you change these values, the diagram in the Preview window changes to reflect the settings you enter. When you're satisfied with the layout, click OK two times to return to the Envelopes and Labels dialog box and then print your labels. Word asks whether you're sure you want to change the label format; click Yes to proceed.



# Chapter 2: Faxing and E-Mailing Documents

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## *In This Chapter*

- ✓ Faxing a document the old-fashioned way
- ✓ Faxing a document with an Internet fax service
- ✓ Sending a document via e-mail
- ✓ Sending a document as an e-mail attachment

**T**his chapter covers two features in Word that let you send documents to other people. First you find out how to send a Word document as a fax to anyone who has a fax machine. Then you discover how to e-mail a Word document directly to anyone who has an e-mail address.

Given the choice, e-mailing a document is usually the better solution: The user who receives a document via fax gets a pile of paper, crudely printed on a low-resolution fax machine. But if you e-mail the document, the recipient gets an actual copy of your Word document file, which she can then save to disk, print, and perhaps even modify and send back. The choice is yours.

## *Sending a Fax*

Betcha didn't know that the first patent for a workable fax machine was issued in England in 1843, and that by the 1920s, AT&T offered a fax service that could send copies of photographs over telephone lines for use in newspapers.

Faxing is obviously a fairly old technology. And Word has supported document faxing almost from the beginning. You can fax a Word document in three basic ways:

- ◆ **Print and fax the document.** The easiest way is to print the document and then use a separate fax machine to send the fax. I know it doesn't sound elegant, but if you send only occasional faxes and you have a fax machine at your disposal, this technique saves you the hassle of figuring out how to deal with Word's built-in faxing features.

- ◆ **Use a fax modem.** If you have a fax modem installed in your computer and the modem is plugged in to a telephone line, you can send the document to a fax recipient by printing the document, specifying “Fax” as the printer name. I describe this technique in the upcoming section “Using a fax modem.”
- ◆ **Use a fax service.** If you have no fax modem but have a connection to the Internet, you can send a fax by using one of the many Internet-based faxing services. For more information, see the section “Using a fax service,” later in this chapter.

### *Using a fax modem*

To send a fax by using a built-in fax modem, you must properly install the modem in your computer and plug it in to a phone line. In addition, your computer must have Windows Fax and Scan (Windows Vista or 7) or Windows Fax Services (Windows XP) installed. Either of those services installs a fax driver as a printer. You then “print” to that driver to send the fax.

Windows Vista and Windows 7 (Business and Ultimate editions) come with Windows Fax and Scan preinstalled. If Windows Fax and Scan is not installed, you probably have the Home or Basic edition of Windows, which doesn’t include it. Not sure? Click Start and then type **fax**; if you have the program, it appears at the top of the start menu. You can also check the Devices and Printers folder (from the Control Panel) to see if a fax driver is installed.

In Windows XP, you need Windows Fax Services, which may or may not already be installed. If it isn’t, choose Start⇨Control Panel to open the Control Panel folder. Double-click the Add/Remove Programs icon and then click Add/Remove Windows Components. When the Windows Components Wizard appears, select Fax Services, click Next, and follow any other instructions Windows throws in your face.

To send a document by using your fax modem, after ensuring that you have some faxing software available as just described, follow these steps:

- 1. Open the document you want to send.**
- 2. Choose File⇨Print.**  
The Print page of Backstage view appears.
- 3. Select Fax from the drop-down list of printers.**
- 4. Follow the prompts that appear to send the fax.**

The prompts are different depending on your Windows version and whether you have faxed something before (and therefore gone through the fax setup process).

### *Using a fax service*

If you don't have a fax modem installed on your computer but do have an Internet connection, you can use an Internet faxing service to send a fax. Unfortunately, these services aren't free. Fees range from \$5 to \$20 or more per month, depending on the features you sign up for. In addition, you must have Outlook installed on your computer to use a fax service.

To send a document via a fax service, choose **File**⇨**Save and Send**⇨**Send Using E-Mail**⇨**Send as Internet Fax**. The first time you do this, a dialog box appears, telling you that you have to first sign up for a faxing service. When you click **OK**, Word launches an Internet Explorer window that opens a Microsoft Web page that lists Internet fax services. You can then follow the links to sign up for a service.

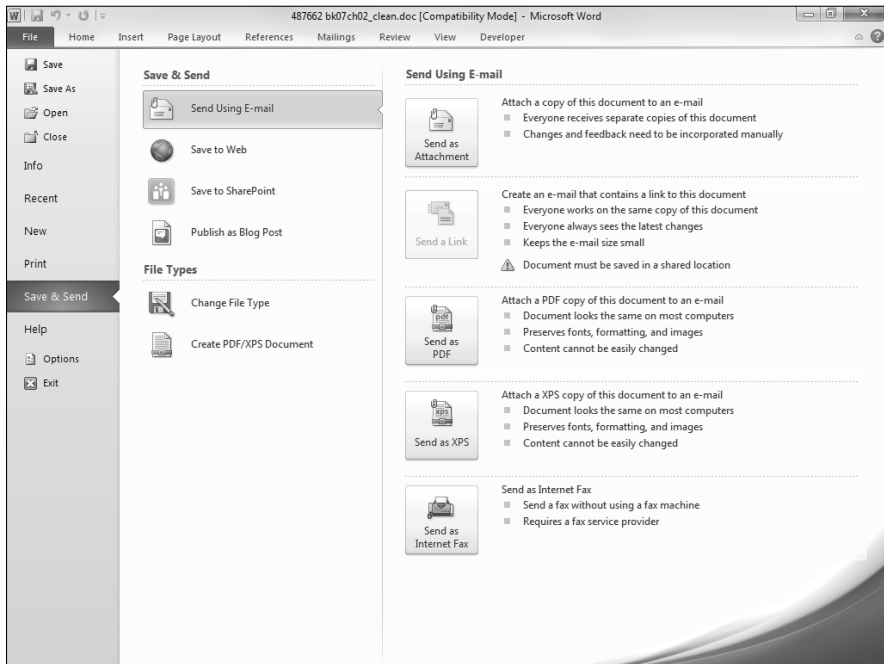
After you properly sign up, choosing **File**⇨**Save and Send**⇨**Send Using E-Mail**⇨**Send as Internet Fax** adds a special header at the top of the document that lets you specify the subject and recipient information. Fill in this information and then click **Send** to send your fax.

## *Sending a Document via E-Mail*

If your computer is connected to a network or to the Internet, you can send a copy of the document you're working on to a friend or coworker via e-mail. Start by clicking the **File** tab and then choosing **Save and Send**⇨**Send Using Email**. This action displays the e-mail options shown in Figure 2-1.

As you can see, the **Send Using E-mail** command gives you five options for sending the document as an e-mail:

- ◆ **Send as Attachment:** Creates an e-mail message with the saved copy of the document attached.
- ◆ **Send a Link:** Creates an e-mail message with a link to the document. Note that this option is available only if you have first saved the document to a Web server.
- ◆ **Send as PDF:** Saves a PDF version of the document and then creates an e-mail with the PDF copy attached.
- ◆ **Send as XPS:** Saves an XPS version of the document and then creates an e-mail with the XPS copy attached. (The XPS document format is similar to PDF, but not as widely used.)
- ◆ **Send as Internet Fax:** If you have a service set up, sends the document to that service for faxing. Otherwise, it opens a Web page from which you can browse and sign up for a service.



**Figure 2-1:**  
Five ways  
to send an  
e-mail in  
Word 2010.

# Chapter 3: Using the Mail Merge Wizard

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## *In This Chapter*

- ✓ Understanding how mail merge works
- ✓ Getting started with the Mail Merge Wizard
- ✓ Following the Mail Merge Wizard's instructions
- ✓ Working with the Mailings tab

**M**ail merge. Just the sound of those two words is enough to drive even veteran Word users into a state of utter and complete panic. Just when you think that you've figured out enough about mail merge to put out a simple form letter, along comes Word with a bunch of additional mail-merge features. Arghhhh! What next?

This chapter shows you how to use Word's Mail Merge Wizard to perform basic mail merges. After you master the basics, you might also want to read the next chapter, which presents some more advanced mail-merge features that come in handy from time to time.

## *Understanding Mail Merge*

*Mail merge* refers to the process of merging a file that contains a list of names and addresses with another file that contains a model letter to produce a bunch of personalized form letters. Suppose that you decide to do some volunteer work for the local public library and the library decides to put you in charge of getting deadbeats to return long overdue books. A personalized letter is the ideal way to communicate your message to these good-for-nothings. And Word's mail-merge feature is ideal for preparing this type of personalized letter.

The beauty of the whole thing is that you can keep the names and addresses in a separate file and use them again. After all, you know that these same people will probably have overdue books again soon.

Mail merge involves three basic steps:

### 1. Create the main document.

The *main document* contains the letter you want to send. It includes the text that's printed for each letter plus special *merge fields* that indicate exactly where to place in each letter the information from your mailing list, such as the recipient's name and address.

### 2. Create the data source.

The *data source* is just a fancy name for the list of names and addresses that's used to create the form letters. The data source can be a Word document, in which case the information is stored in a table, with one row for each name and address. Individual fields, such as name, address, city, state, and zip code are stored in separate columns. Or, the data source can be a list of contacts maintained by Outlook, a database created by a program such as Access, or another type of file. The data source must list the data in a consistent format.

### 3. Merge the main document with the data source.

This step creates a form letter for each row in the data source table. You can create the form letters as a separate document, with one letter on each page, or send the merged letters directly to the printer. You can also send the merged letters to e-mail or to a fax machine.



You can use mail merge to produce more than form letters. You can also use it to print envelopes or mailing labels or even documents that have nothing to do with mailing, such as a directory or a catalog. In short, mail merge is useful for any application in which a list of consistently formatted and repeating data must be converted into a document in which each record in the data source is formatted in a similar way.

## *Using the Mail Merge Wizard*

To start the Mail Merge Wizard, first create a new, blank document or open an existing letter. Then click the Mailings tab on the Ribbon, click Start Mail Merge in the Start Mail Merge group, and choose Step By Step Mail Merge Wizard from the menu that appears. The wizard appears in the task pane on the right side of the document window, as shown in Figure 3-1.

After you open the wizard, you can follow the steps I outline in the following sections.

### *Creating the main document*

The first mail-merge task the wizard helps you accomplish is setting up your main document. Here are the steps:

#### 1. Select the type of documents you want to create for your mailing.



The choices are

- Letters
- E-Mail Messages
- Envelopes
- Labels
- Directory

For normal, run-of-the-mill mass mailings, select Letters.

**2. Click Next at the bottom of the Mail Merge Wizard.**

Step 2 of the Mail Merge Wizard appears, as shown in Figure 3-2.

**3. Click the Use the Current Document option, if it isn't already selected.**

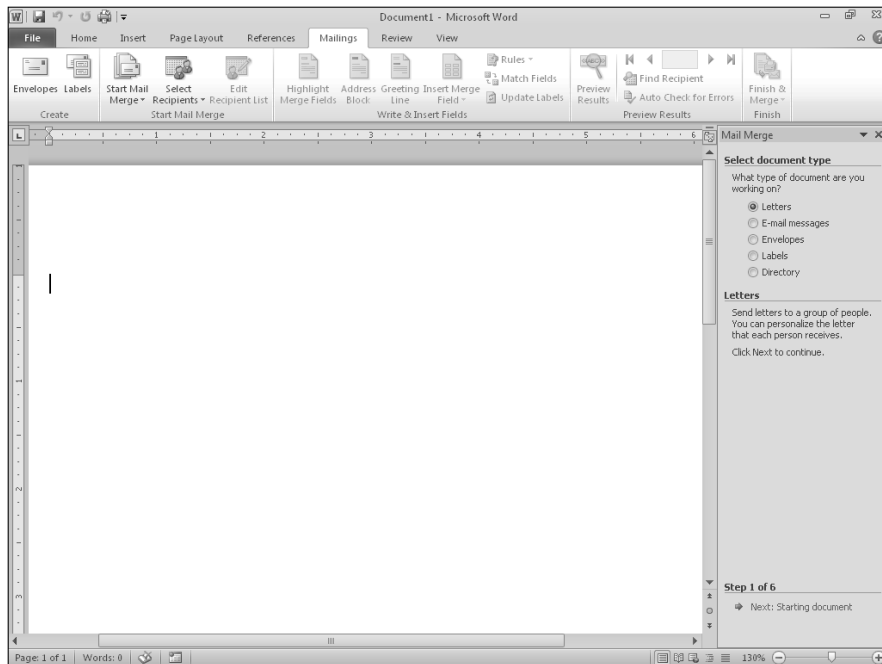
If you prefer to start a new document based on a template rather than use the current document, choose Start from a Template. Then click the Select Template link and select the template you want to use.

**4. Type the body of your letter.**

Leave out the address block and greeting line. You will add them later.

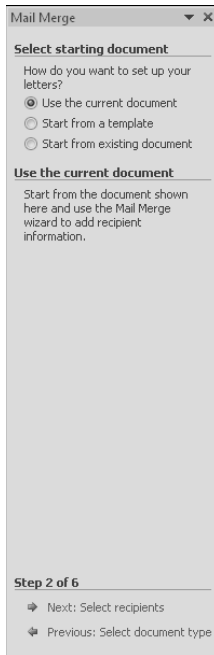
**5. Choose File⇨Save to save the file when you're done.**

Your letter looks something like the one shown in Figure 3-3.

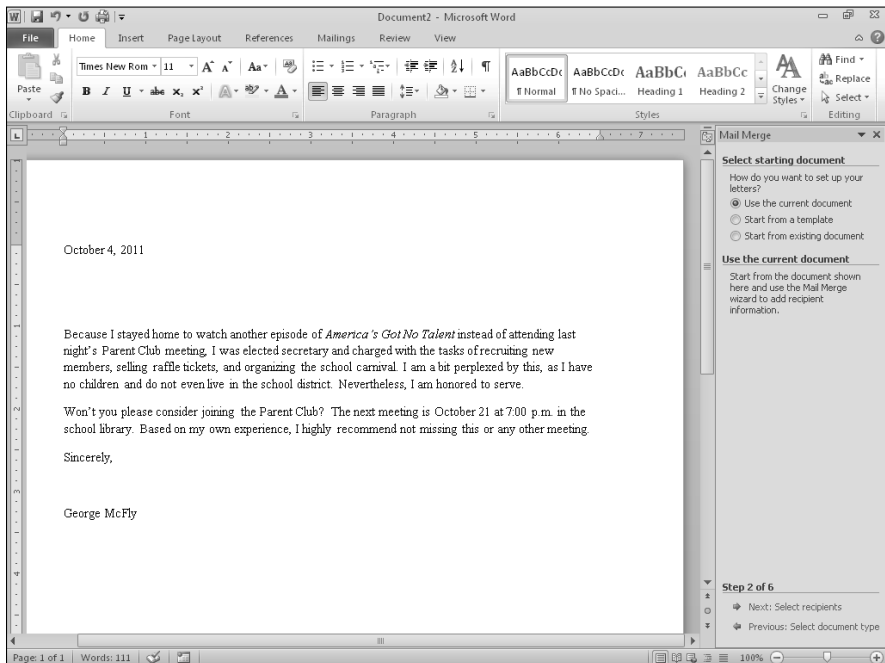


**Figure 3-1:**  
The Mail  
Merge  
Wizard in  
action.

## 432 Using the Mail Merge Wizard



**Figure 3-2:**  
Select the  
starting  
document.



**Figure 3-3:**  
A letter  
ready to use  
as a main  
document.

## Creating an address list

The next big step in the Mail Merge Wizard is to select the recipients who will receive your letters. This step is usually the hardest part of the entire procedure because it often involves creating an address list with the names and addresses of your recipients. Here are the bothersome steps:

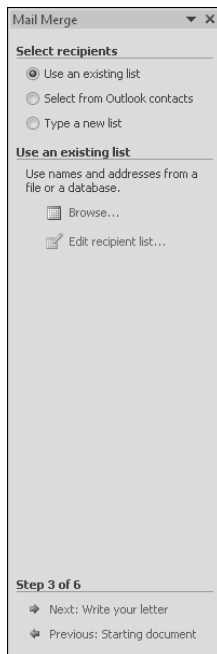
1. If you haven't already done so, click **Next** at the bottom of the wizard to proceed to the **Select Recipients** step.



Step 3 of the wizard makes its appearance, as shown in Figure 3-4.

If you already created the address list, you can open it by selecting the **Use an Existing List** option instead of the **Type a New List** option. Then click **Browse**. When the **Select Data Source** dialog box appears, locate the file you previously saved as the address list and click **Open**. Then the **Mail Merge Recipients** dialog box appears and you can skip to Step 8.

You can also use data from Outlook or from an Access database. To use names and addresses from Outlook, choose the **Select from Outlook Contacts** option in Step 2 and then click **Choose Contacts Folder**. To use an Access database (or any other database), select **Use an Existing List** in Step 2, click the **Browse** button, and then locate the database in the dialog box that appears.



**Figure 3-4:**  
Select  
the lucky  
recipients.

2. **Select the Type a New List radio button and then click the Create link.**

The New Address List dialog box appears, shown in Figure 3-5.

**Figure 3-5:**  
The New  
Address List  
dialog box.

3. **Type the information for a person you want to add to the address list.**

Press Tab to move from field to field or to skip over fields in which you don't want to enter any data. (You don't need to enter a value for every field.)

4. **After you type all the data for the person, click the New Entry button to add that person's data to the address list.**

5. **Repeat Steps 3 and 4 for each person you want to add to the data source.**

To delete a record, move to the record that you want to delete and then click the Delete Entry button.

6. **After you add all the names you want, click OK.**

A Save Address List dialog box appears.

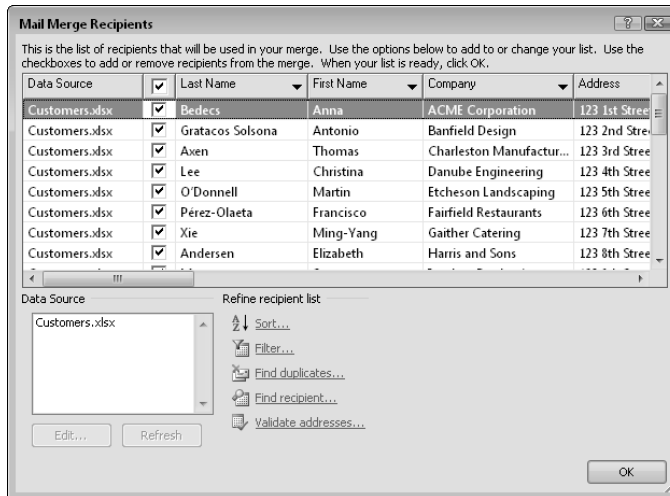
7. **Type a name for your address list and then click Save.**

The file is saved to your computer's hard drive. Then the Mail Merge Recipients dialog box appears, as shown in Figure 3-6.

From the Mail Merge Recipients dialog box, you can edit the records in the data source by selecting the data source in the Data Source list (in the lower-left corner of the dialog box) and then clicking the Edit button.



**Figure 3-6:**  
The Mail  
Merge  
Recipients  
dialog box.



**8. Click the column heading for the column you want to sort the list by.**

For example, if you want the letters to print in zip code sequence, click the heading for the Zip Code column. (You have to scroll the list to the right to see the Zip Code column.)

**9. Deselect any records that you don't want to include in the mailing.**

The mailing will be sent to every record that's selected, and the records are all initially selected, so you can manually remove people from the list by deselecting them.

If the mailing will be sent to only a few people on the list, click the Clear All button to remove all check marks. Then review the list and select the ones you want to send the mailing to.

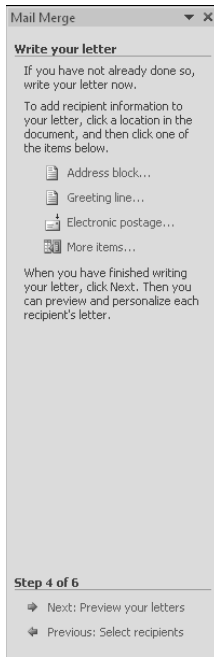
## Inserting the address block and greeting line

After you add names and addresses to the data source, finish your letter by adding placeholders for the address block, greeting line, and any other information you want to insert from the address list. In Wordspeak, these placeholders are *merge fields*.

Display the main document (your letter) and then follow these steps:

**1. Click Next at the bottom of the wizard to bring up Step 4 of the wizard.**

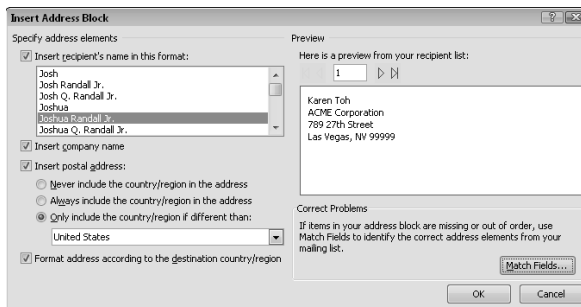
As the Mail Merge Wizard in Figure 3-7 shows, this step allows you to add the address block and other merge fields to your letter.



**Figure 3-7:**  
Completing  
the letter.

2. Position the insertion point where you want to insert the address block.
3. Click the Address Block link in the Mail Merge Wizard.

The Insert Address Block dialog box appears, as shown in Figure 3-8.



**Figure 3-8:**  
The Insert  
Address  
Block  
dialog box.

4. Select the options you want to use for the address block and then click OK.

You can select the format to use for the recipient's name and whether to use the company name and country and region information in the address.

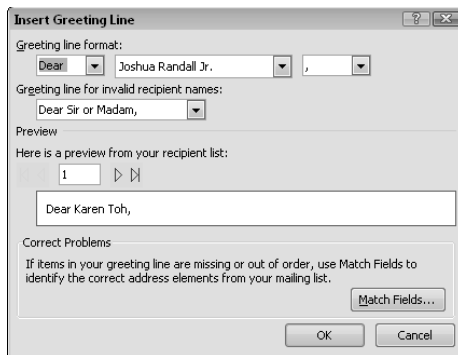
If one of the fields is missing from the sample, such as State, click Match Fields and make sure that Word is matching up the fields from the data source correctly with the fields for the address block.

When you click OK, the Insert Address Block dialog box is dismissed and the address block is inserted.

**5. Position the insertion point where you want to insert the greeting line and click the Greeting Line link in the Mail Merge Wizard.**

The Insert Greeting Line dialog box appears, as shown in Figure 3-9.

**Figure 3-9:**  
The Insert  
Greeting  
Line dialog  
box.



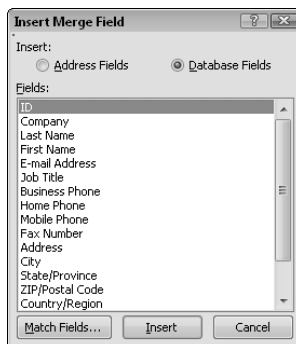
**6. Select the options you want to use for the greeting line and then click OK.**

The Insert Greeting Line dialog box lets you select several options for creating casual or formal greeting lines. When you click OK, the greeting line is inserted into the document.

**7. If you want to insert a field from the address list into the body of the letter, move the insertion point to where you want to insert the field and click the More Items link in the Mail Merge Wizard.**

The Insert Merge Field dialog box opens, as shown in Figure 3-10.

**Figure 3-10:**  
The Insert  
Merge Field  
dialog box.



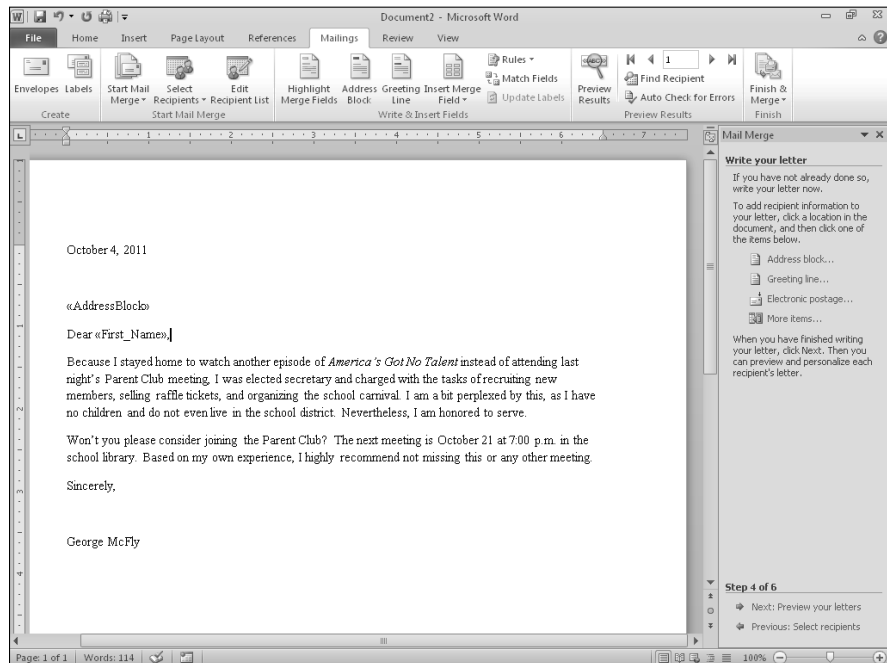
### 8. Select the field you want to insert and click **Insert**.

The field is inserted into the document. The Insert Merge Field dialog box remains onscreen so that you can insert other fields, if you're so inclined.

### 9. Repeat Step 8 for any other fields you want to insert and then click **Close**.

When you click Close, the Insert Merge Field dialog box is dismissed.

Figure 3-11 shows how a letter appears after you insert the Address Block, and First and Last Name fields in the body of the document. Notice that merge fields display within special chevron characters — for example, «AddressBlock» and «First\_Name».



**Figure 3-11:**  
A letter  
with fields  
inserted.

## *Merging the documents*

After you set up the main document and the address list, you're ready for the show. Follow these simple steps to merge the main document with the data source to produce form letters:

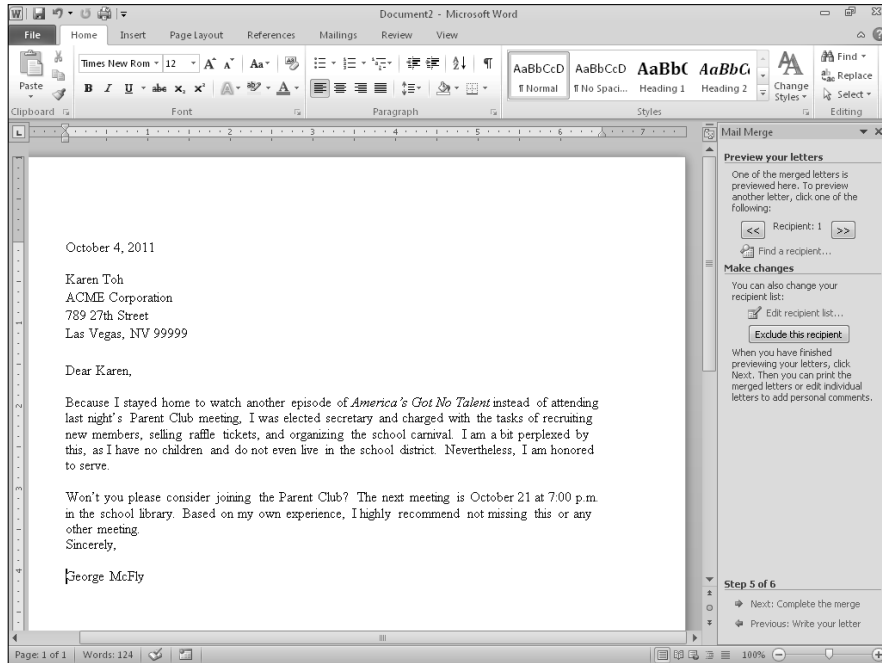
### 1. Click **Next** for the next step of the wizard — **Preview Your Letters**.

The first letter in your mail merge appears onscreen, as shown in Figure 3-12.





If there is extra vertical space in the address block, there are a couple of workarounds. One is to go back and insert individual fields instead of the «Address Block» code, and press Shift+Enter instead of Enter to end each line of the address. Another is to choose Home→Change Styles→Style Set→Word 2003 to switch to a style set that does not include the extra spacing.



**Figure 3-12:**  
Previewing  
the mail  
merge.

## 2. Review each letter in the merge.

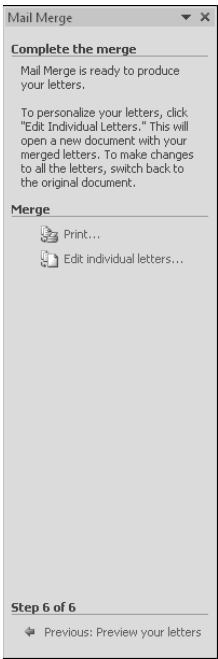
You can click the >> or << button in the Mail Merge Wizard to move forward or backward through the letters. If you find a mistake in a name or address, correct the mistake directly on the letter.

If you find a letter that you don't want to include, click the Exclude This Recipient button in the wizard.

If you review the first few letters and they look okay, you can skip ahead to the next step without reviewing them all.

## 3. After you review the entire mailing, click Next at the bottom of the wizard.

The final step of the wizard appears, as shown in Figure 3-13.



**Figure 3-13:**  
Completing  
the mail  
merge.





















4. Click the **Print** link to print your letters or click the **Edit Individual Letters** link to merge the letters to a new document.

If you click **Edit Individual Letters**, the merged letters move to a new document, which you can then edit and save.

## *Using the Mailings Tab on the Ribbon*

If you're an experienced mail-merge user, you can save time by skipping the Mail Merge Wizard and just using the controls on the Mailings tab on the Ribbon to complete your mail-merge tasks. Table 3-1 lists the Mailings tab controls used to complete a mail merge. In general, you use these buttons in sequence from left to right to complete a mail merge.

Table 3-1		Controls on the Mailings Tab
Button	Name	What You Can Do with It
	Start Mail Merge	Choose Letters, E-Mail Messages, Envelopes, Labels, or a Directory for the main document type, and start the Mail Merge Wizard

<b>Button</b>	<b>Name</b>	<b>What You Can Do with It</b>
	Select Recipients	Select the data source by typing a new list, selecting an existing list, or using Outlook contacts
	Edit Recipient List	Edit the recipient list and select which recipients in the list to include in the merge
	Highlight Merge Fields	Highlight the merge fields in the merge document so that they're easy to spot
	Address Block	Insert an address block
	Greeting Line	Insert a greeting line
	Insert Merge Field	Insert a merge field, which lets you add more information from the data source
	Rules	Add more fields that control which records to include in the merge field
	Match Fields	Specify which fields in a database to use for certain mail-merge functions
	Update Labels	Copy the contents of the first label on the page to all subsequent labels
	Preview Results	Preview the merge operation
	First Record	Move to the first record in the data source
	Previous Record	Move to the previous record in the data source
	Next Record	Move to the next record in the data source
	Last Record	Move to the last record in the data source
	Find Recipient	Search for records
	Auto Check for Errors	Check for merge errors
	Finish & Merge	Merge the main document and data source



# Chapter 4: Advanced Mail-Merge Tricks

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## *In This Chapter*

- ✓ Doing an e-mail merge
- ✓ Printing envelopes or labels from an address list
- ✓ Creating a directory
- ✓ Sorting and filtering data
- ✓ Pondering a computer science lesson that tastes like chicken
- ✓ Eliminating duplicate records

**T**his chapter covers some of the more interesting things you can do with Word's mail-merge feature, such as print mailing labels, choose only certain names to print letters for, use data from sources other than Word, and create an address directory.



This chapter assumes that you already know the basics of performing a mail merge. If you're completely new to the topic, stop where you are. Back up very slowly, make no sudden moves, and read Chapter 3 of this minibook. Only after that should you return to this chapter.

## *Other Types of Merges*

Although creating form letters is the most popular use for mail merge, the Mail Merge Wizard can also send e-mail, create personalized envelopes, print address labels, and even create a directory. The following sections show you how to do all these tasks.

### *Merging to e-mail*

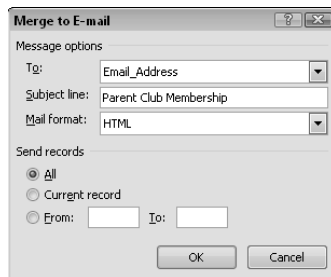
If you want to send your letters by e-mail rather than by snail mail, you can use the Mail Merge Wizard to merge your letters and then send them to e-mail addresses rather than print them. For this merge to work, your computer must have an e-mail program such as Microsoft Outlook installed.



Don't be a spammer! You should send e-mail merges only to people you know or to customers you've done business with and who have agreed to let you send them e-mail.

All you have to do is select E-Mail Messages rather than Letters as the document type in the first step of the Mail Merge Wizard. Then you follow the normal steps for using the Mail Merge Wizard as I describe in Chapter 3 of this minibook, until you reach the last step. Rather than have the normal choices (Print and Edit Individual Letters), you have only one choice: Electronic Mail. Click this link to summon the Merge to E-Mail dialog box, shown in Figure 4-1.

**Figure 4-1:**  
The Merge  
to E-Mail  
dialog box.



Use this dialog box to specify the options you want to use for the e-mail merge. The options are

- ◆ **To:** Use this drop-down list to choose the field in the data source that contains the recipients' e-mail addresses.
- ◆ **Subject Line:** Type the subject line you want to appear in the e-mail messages.  
  
Unfortunately, Word doesn't let you personalize the subject line for each recipient. Each recipient in your mailing sees exactly the same subject line.
- ◆ **Mail Format:** This drop-down list lets you select one of three ways to send e-mail. You can format messages as Plain Text, HTML, or Attachments. Choose HTML if you applied text formats or included images in the message. Otherwise, choose Plain Text.
- ◆ **Send Records:** Use these radio buttons to choose whether to send messages to all recipients in the merge, just the current recipient, or a range of recipients.

## Merging envelopes

Ever spend 30 minutes printing 50 personalized letters by using mail merge and then another 30 minutes hand-addressing envelopes? Never again! Word can easily transform a mail-merge address list into a set of nicely printed envelopes.

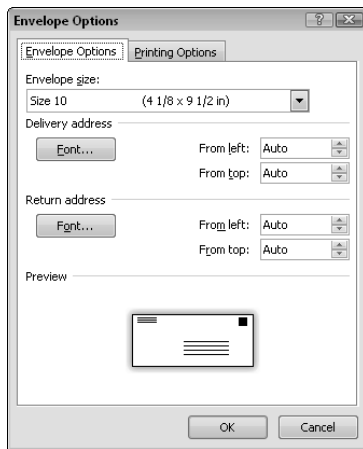


For business mail, a good alternative to printing addresses on envelopes is to simply use window envelopes. That way, the address on the letters inside the envelope shows through the window. This feature has two advantages:

- ◆ You don't have to mess around with printing envelopes.
- ◆ You eliminate the risk of mixing the letters and envelopes and inadvertently sending Mr. Smith's overdue notice to Mr. Jones.

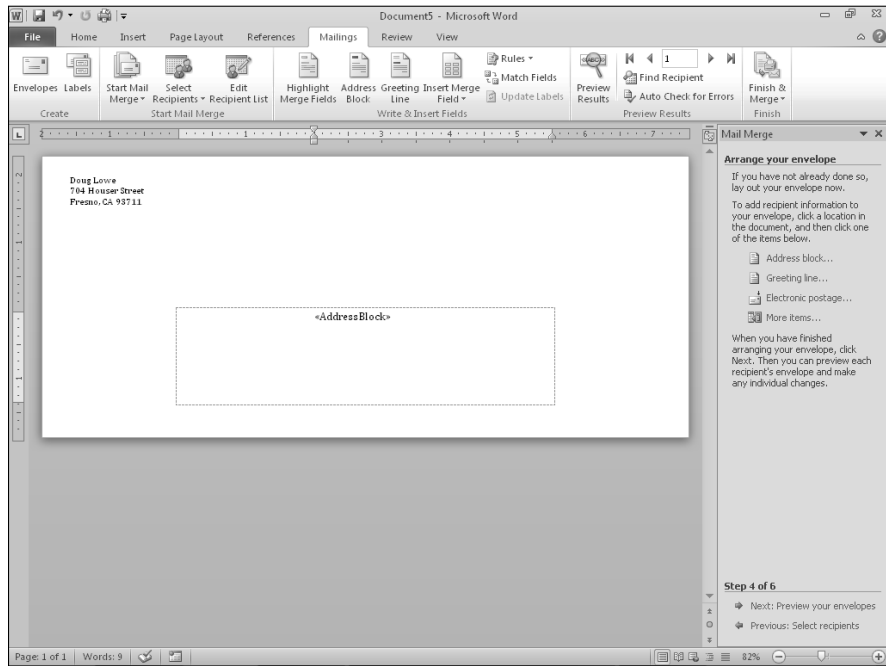
If you still insist on merging envelopes, follow the normal Mail Merge Wizard procedure, with these variations:

- ◆ **In Step 1 of the Mail Merge Wizard:** Select the Envelopes option rather than Letters as the document type.
- ◆ **In Step 2 of the Mail Merge Wizard:** Click Envelope Options to open the Envelope Options dialog box, shown in Figure 4-2. Use this dialog box to select the envelope size and to format the font used for the delivery and return addresses. You can also click the Printing Options tab to adjust Word's envelope layout to match the way envelopes feed into your particular printer. You might need to fiddle with these settings in case your envelopes print upside down or on the wrong side.



**Figure 4-2:**  
The  
Envelope  
Options  
dialog box.

- ◆ **In Step 4 of the Mail Merge Wizard:** Click in the recipient's address area in the center of the envelope and then click the Address Block link to insert a standard address block. Then click in the return address area in the upper-left corner of the envelope and type your return address (unless it already appears there, or unless you are using preprinted envelopes). Figure 4-3 shows how the envelope appears when it has been set up properly.



**Figure 4-3:**  
An envelope  
all ready to  
be merged.

You can also use this step of the Mail Merge Wizard to add a postal bar code to the envelope. And, if you subscribe to an electronic postage service such as Stamps.com, you can print e-postage directly on the envelope so that you don't have to use stamps.



The *postal bar code* isn't a secret password that gets you into pubs where mail carriers hang out — it's a bar code that speeds mail delivery. If you do bulk mailing and have the proper permits, using this bar code can earn postage discounts.

You can complete the rest of the Mail Merge Wizard steps as you do for a printed letter.

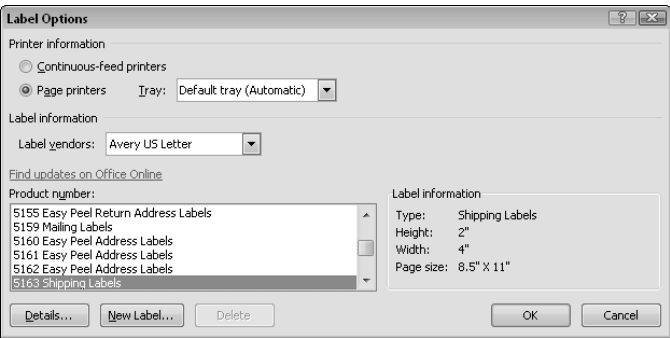
## Merging to labels

If you want to create mailing labels instead of envelopes, choose Labels as the document type in the first step of the Mail Merge Wizard. Then follow the normal Mail Merge Wizard steps, with these exceptions:

- ◆ **In Step 2 of the wizard, click Label Options to open the Label Options dialog box, shown in Figure 4-4.** Use this dialog box to specify the type of labels you're using.

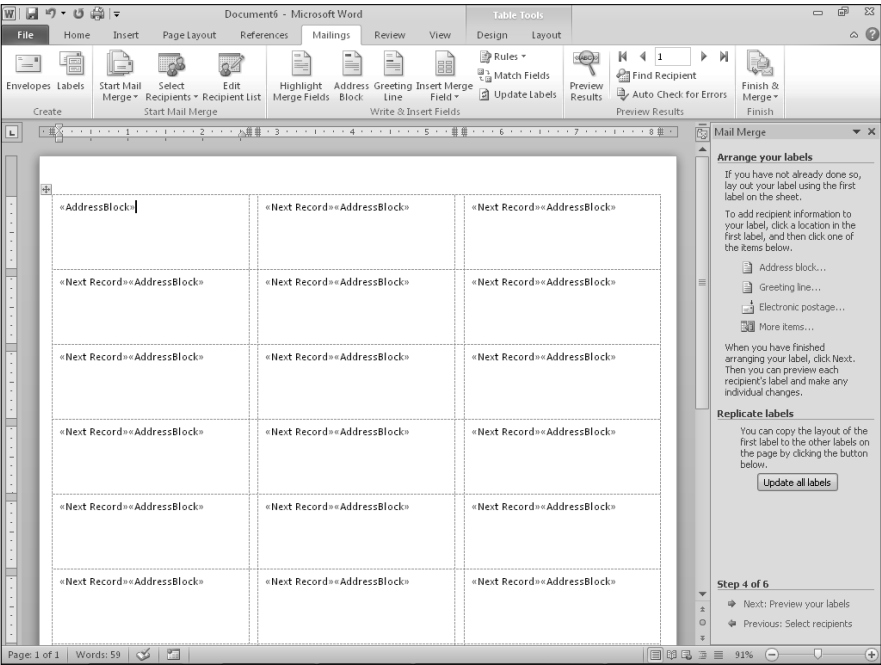


Figure 4-4:  
The Label  
Options  
dialog box.



◆ **In Step 4 of the wizard, you format the labels.** To do that, click in the first label and then click the Address Block link to insert an address block in the label. If you want, change the font or size of the address block. Then click the Update All Labels button at the bottom of the Mail Merge Wizard. The contents of the first label are copied to all other labels on the page. A Next Record field appears in each label except the first, to tell Word to skip to the next recipient. When you're done, your main document resembles Figure 4-5.

Figure 4-5:  
A label main  
document.



You can complete the rest of the Mail Merge Wizard in the usual way.

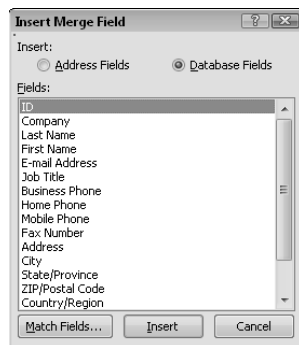


If the addresses don't fit properly in the labels, first ensure that you selected the correct label type in the Label Options dialog box. If the labels are correct and the addresses still don't fit, return to Step 4 and try reducing the font size for the address block. You can do this by changing the size for the first label. Then click the Update All Labels button to propagate the change to all other labels.

### *Creating a directory*

You can use the Mail Merge Wizard to create a directory that lists all addresses in a data source by choosing Directory as the document type in Step 1 of the wizard. Then follow the wizard's normal steps with these variations:

- ◆ **In Step 4, add the merge fields you want to appear for each item in the directory.** For a simple address listing, you can just click the Address Block link. Or, you can create a more customized directory by clicking the More Items link to open the Insert Merge Field dialog box, shown in Figure 4-6.



**Figure 4-6:**  
The Insert  
Merge Field  
dialog box.

For example, here's one way to format an address listing that lists people in alphabetical order, with last name first:

```
<<LastName>>, <<FirstName>>
<<Address_Line_1>>
<<Address_Line_2>>
<<City>>, <<State>> <<ZIP_Code>>
<<HomePhone>>
```

- ◆ When the preview of the document appears in Step 5, only the first record is shown. Don't panic. All records appear when you complete the merge.
- ◆ In Step 6, click the To New Document link. A new document is created for your directory. Then choose File⇨Save to save the directory to a file.

## Fun Things to Do with the Data Source

Mail merge is useful enough if all you do with the data source is store names and addresses. But Word data sources have more tricks up their sleeves than meet the eye. With a little chutzpah and a bit of wrestling with the dialog boxes, you can do several cute and moderately useful tricks with the data source. The following sections explain these amazing feats.

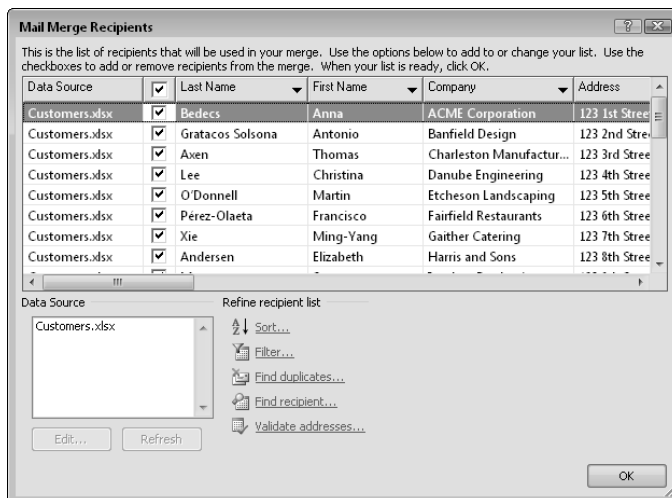
### Sorting records

Suppose that you enter all names in whatever sequence they were sitting in the pile but you want to print the letters in alphabetical order. No problem! Just sort the data source.

Sorting is controlled from the Sort Records tab in the Filter and Sort dialog box. To open this dialog box and sort your merge records, follow these steps:

1. **Start a mail merge as usual. In Step 3 of the Mail Merge Wizard, click Edit Recipient List.**

The dialog box that opens lets you edit recipient addresses, as shown in Figure 4-7.

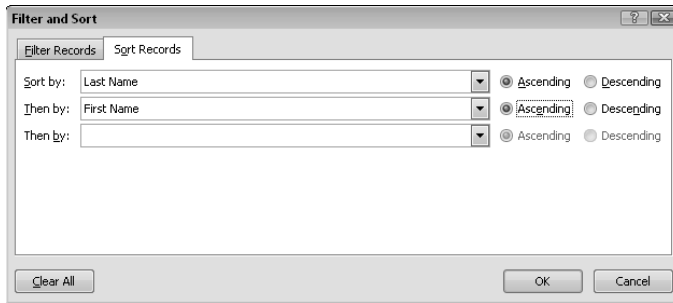


**Figure 4-7:**  
Editing the  
recipient  
list.

2. **Click the Sort link.**

The Filter and Sort dialog box opens, as shown in Figure 4-8.

**Figure 4-8:**  
Sorting the  
recipient  
list.



3. **From the Sort By drop-down list, select the merge field by which you want to sort the data source.**

Click the down arrow in the Sort By drop-down list to reveal a list of all merge fields in the data source and then select the one by which you want to sort the data. (In Figure 4-8, I chose Last Name for the first sort field.)

If you want to sort records in reverse order, select the appropriate Descending option. Records are then sorted on that field in reverse order, beginning with the z's and working back up to the a's.



4. **If you want a second or third sort field, set them in the two Then By fields.**

The Then By field is used as a tiebreaker when two or more records have the same main Sort By field. For example, in Figure 4-8, I chose First Name as the second sort field. Then if the data source has more than one record with the same Last Name, they sort into sequence by their first names, like this:

King	Larry
King	Martin Luther
King	Stephen

If you have a third field you can use as a tiebreaker, set it in the next Then By field.

5. **Click OK twice.**

You return to the Mail Merge Wizard.

6. **Finish the merge.**

Your letters (or envelopes or labels or whatever) now print in the proper sequence.

## ***Filtering records***

*Filtering* lets you automatically select certain names from your database based on arbitrary criteria. For example, you might want to send letters only to bald-headed starship captains of French descent. Sending letters to this

group is possible if you have fields in your data source for Starfleet rank, degree of baldness, and country of origin.



Unlike the filters in your car, mail merge filters don't fill up with gunk, so you don't have to change them every 5,000 miles. You do have to be careful about how you set them up, though, to be sure that they choose just the records you want to include in your mail merge.

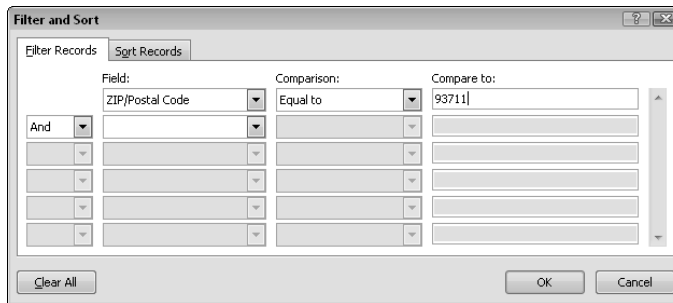
To mail letters to only a lucky few recipients, follow these steps:

1. **Start a mail merge as usual. When you reach Step 3 of the Mail Merge Wizard, click Edit Recipient List.**

The Mail Merge Recipients dialog box appears. (If you already have chosen a recipient list, click Edit Recipient List to summon this dialog box.)

2. **Click the Filter link.**

The dialog box shown in Figure 4-9 appears.



**Figure 4-9:**  
Filtering the  
recipient  
list.

3. **Set the criteria for including records in the mail merge by specifying a Field, Comparison, and Compare To value for each criteria.**

To create a letter only for people who live in the 93711 zip code, for example, set the first Field to Zip Code, the first Comparison to Equal To, and the Compare To field to 93711. This filter means that the mail merge includes only the records whose Zip Code field is equal to 93711. (That's how the filter shown in Figure 4-9 is set up.)

The following section contains an explanation of the options in the Comparison fields.

4. **Click OK twice.**

You return to the Mail Merge Wizard.

5. **Finish the mail merge.**

Now only the records that match the filter criteria are included in the merge.

## Unprecedented stuff about precedence

Be careful when you set up a query that uses three or more field tests and mixes And and Or. You're confronted with the issue of precedence, which means, in layperson's terms, "The chicken or the egg?" You might suppose that Word tests the conditions you list in the Filter and Sort dialog box in the order in which you list them. Not necessarily. Word groups any condition tests linked by And and then checks them out before combining the results with tests linked by Or.

Confused? So am I. The following example shows how it works. Suppose that you open a restaurant menu and see that the fried chicken dinner comes with a "leg or wing and thigh." Which of the following statements represents the two possible chicken dinner combinations you can order?

- ✓ You can order a meal with a leg and a thigh or a meal with a wing and a thigh.
- ✓ You can order a meal with a leg or a meal with a wing and thigh.

According to the way Word processes queries, the answer is the second one. Word lumps together as a group the two options linked by And.

If you want the first example to be the right answer, you have to state the menu choice as "leg and thigh or wing and thigh."

For a more realistic Microsoft Word example, suppose that you want to mail to everyone who lives in Olympia, Washington, just across the way in Aberdeen. You might be tempted to set the query up like this:

State Equal To WA

And City Equal To Olympia

Or City Equal To Aberdeen

Unfortunately, this example doesn't work. You end up with everyone who lives in Olympia, Washington, plus anyone who lives in any town named Aberdeen, regardless of the state. (You can find Aberdeen in Maryland and in South Dakota too.)

You can just petition the federal government to make Aberdeen, Maryland, and Aberdeen, South Dakota, change their names. But the better way is to set up the filter like this:

State Equal To WA

And City Equal To Olympia

Or State Equal To WA

And City Equal to Aberdeen

## Understanding relationships

You can set up ten different kinds of tests in the Comparison fields.

Computerniks call these tests *relational tests* because they test the relationship between two items (in this case, a merge field and a specific value). You can use the following relational tests to create different kinds of selection filters:

- ◆ **Equal To:** Selects records if the field matches the Compare To value exactly.
- ◆ **Not Equal To:** Selects records if the field doesn't match the Compare To value exactly.
- ◆ **Less Than:** Selects records if the field is less than the Compare To value.
- ◆ **Greater Than:** Selects records if the field is greater than the Compare To value.
- ◆ **Less Than or Equal:** Selects records if the field is less than or equal to the Compare To value.
- ◆ **Greater Than or Equal:** Selects records if the field is greater than or equal to the Compare To value.
- ◆ **Is Blank:** Selects records in which the field is blank.
- ◆ **Is Not Blank:** Selects records in which the field isn't blank.
- ◆ **Contains:** Selects records if the field contains the Compare To value.
- ◆ **Does Not Contain:** Selects records if the field doesn't contain the Compare To value.

You can set up complicated queries that check the contents of several fields. You might want to mail letters only to people who live in a particular city and state, for example. You set up the query like this:

```
City Equal to Bakersfield
And State Equal to CA
```

In this query, the merge includes only records whose City field is equal to *Bakersfield* and whose State field is equal to *CA*.

You can also set up queries that test the same field twice. To mail to addresses with the zip codes 93711 or 93722, for example, set up the query like this:

```
Zip Code Equal to 93711
Or Zip Code Equal to 93722
```

Notice that I change the And/Or field from And to Or. That way, a record is selected if its Zip Code field is 93711 or 93722. If you test the same field for two or more specific values, don't leave the And/Or field set to And. If I were to leave the And/Or field set to And in the preceding example, a record is selected only if its Zip Code field is equal to 93711 and if it's also equal to 93722. Obviously, this situation isn't possible: The zip code may be 93711

or 93722, but it can't be both at the same time. Leaving the And/Or field set to And is natural because you want to "mail letters to everyone in the 93711 *and* 93722 zip codes." But when in this situation, you have to specify Or, not And.

On the other hand, suppose that you want to mail to anyone whose zip code is 93711 or 93722 or any value between the two. In that case, you use two condition tests linked by And, as shown in this example:

```
Zip Code Greater Than or Equal to 93711  
And Zip Code Less Than or Equal to 93722
```

For an even more interesting twist concerning And/Or, see the earlier sidebar "Unprecedented stuff about precedence."

### ***Weeding out duplicates***

The bigger your recipient list gets, the more difficult it is to keep track of who's already entered into the list. Over time, you're bound to end up with duplicate entries.

To save postage costs, you can use the Find Duplicates feature to spot potential duplicate records. Follow these steps:

- 1. Start a mail merge as usual. When you reach Step 3 of the Mail Merge Wizard, click Edit Recipient List.**

The Mail Merge Recipients dialog box appears. (If you already have chosen a recipient list, click Edit Recipient List to summon this dialog box.)

- 2. Click the Find Duplicates link.**

The Find Duplicates dialog box, shown in Figure 4-10, appears. This dialog box lists records that might be duplicates.

- 3. Deselect the records you don't want to include in the merge.**

You have to double-check every group of records in the Find Duplicates dialog box. If you find a true duplicate, you should deselect the record or records you don't want to send mail to.

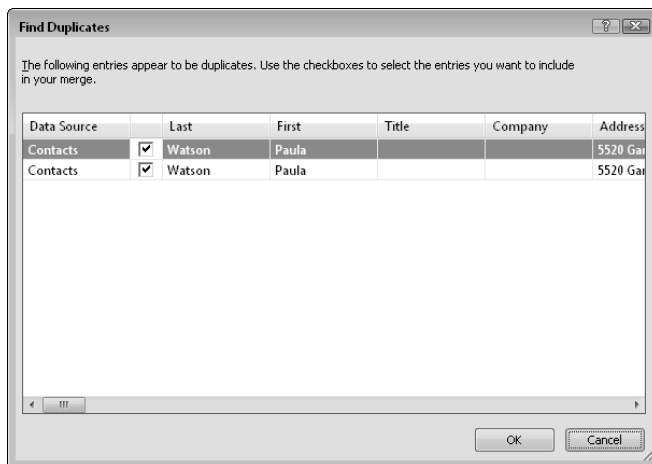
- 4. Click OK and then click OK again.**

- 5. Finish the mail merge.**

Now the merge doesn't include duplicate records.



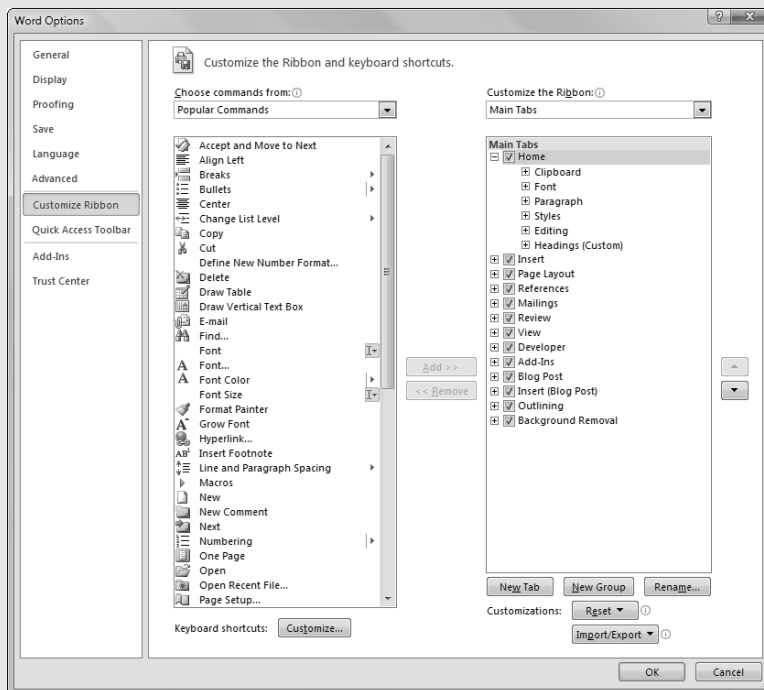
**Figure 4-10:**  
The Find  
Duplicates  
dialog box.





# Book VIII

# Customizing Word



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# Chapter 1: Customizing the User Interface

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## *In This Chapter*

- ✓ Playing with the Quick Access toolbar
- ✓ Dealing with old custom toolbars
- ✓ Adding custom keyboard shortcuts

One great strength of previous versions of Word — up to and including Word 2003 — has been that the menus, toolbars, and keyboard shortcuts that make up the user interface have been almost completely customizable. If you didn't like the way the toolbars were arranged, you could rearrange them to your liking. Need a new menu command? You could write a macro to carry out the command and then assign the macro to a new menu item. You could even create entirely new toolbars or menus.

Unfortunately, the menus and toolbars were a little *too* easy to customize. In its studies before developing Word 2010, Microsoft found that far more people *accidentally* customized Word's user interface than did it on purpose. It was all too easy to accidentally drag a toolbar to a weird location or make it disappear altogether.

Thus, when Microsoft introduced the new Ribbon interface in Word 2007, it decided (in its infinite wisdom) to make the Ribbon almost impossible to customize. In Word 2007, you could customize the Quick Access toolbar, but nothing else.

That turned out to be one of the biggest complaints about Word 2007. So, with Word 2010, Microsoft reversed course and decided to once again let you customize the user interface. But this time it was done right, nearly eliminating the possibility of accidentally doing something goofy.

In this chapter, you find out how to customize the Quick Access toolbar and the Ribbon. And, as a bonus, you find out how to create your own custom keyboard shortcuts too.

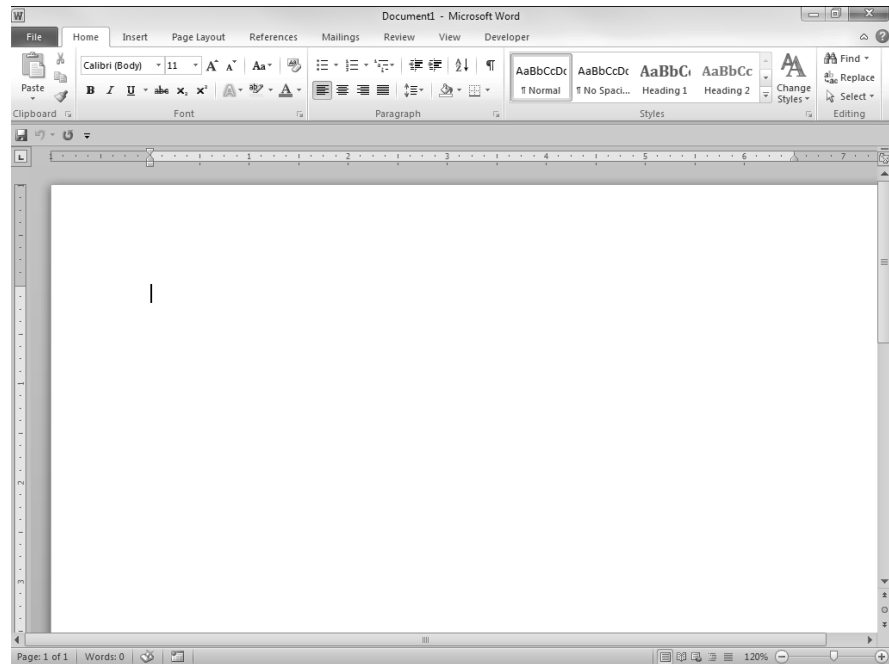
## *Customizing the Quick Access Toolbar*

The Quick Access toolbar is the closest thing Word 2010 has to a customizable toolbar. You don't have the same options for customizing it as you did with ordinary toolbars in previous versions of Word. But you can choose one of two positions for it, and you can choose which buttons you want it to contain. I describe these simple customizations in the following sections.

### *Relocating the Quick Access toolbar*

By default, the Quick Access toolbar appears above the Ribbon near the document title. Most users find this to be the most convenient location. However, Word lets you position it beneath the Ribbon, as shown in Figure 1-1.

**Figure 1-1:**  
The Quick Access toolbar can live above the Ribbon as well as below it.



You have two ways to change the Quick Access toolbar location. The easiest is to click the arrow that appears to the right of any buttons on the toolbar. This action reveals a menu that includes two commands. The second of these commands moves the Quick Access toolbar. If the toolbar is below the Ribbon, the command is named Show Above the Ribbon. If the Quick Access toolbar is already above the Ribbon, the command is named Show Below the Ribbon.

The second way to move the Quick Access toolbar is to follow these steps:

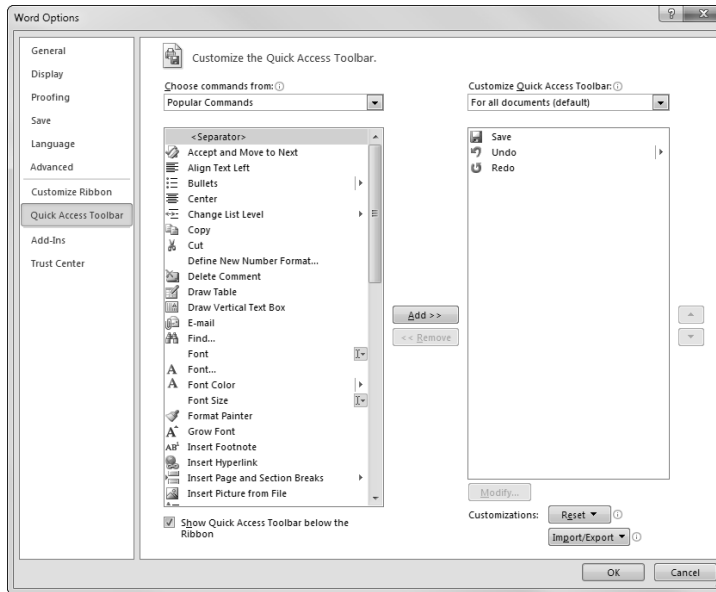
**1. Choose File⇒Options.**

This step opens the Word Options dialog box.

**2. Click the Quick Access Toolbar tab on the left side of the dialog box.**

The Quick Access Toolbar tab appears, as shown in Figure 1-2.

**Figure 1-2:**  
The Quick  
Access  
Toolbar tab  
of the Word  
Options  
dialog box.

**3. Deselect the Show Quick Access Toolbar Below the Ribbon check box to place the Quick Access toolbar above the Ribbon.**

Or, if you've already deselected the box, select it to move the Quick Access toolbar below the Ribbon.

**4. Click OK.**

The Quick Access toolbar moves to its new location.

Here are a few points to ponder concerning the position of the Quick Access toolbar:

- ◆ You can move the Quick Access toolbar, but you can't remove it. In other words, there's no option to hide it.
- ◆ If you've used previous versions of Word, your first instinct for relocating the Quick Access toolbar is to simply grab it with the mouse and drag it to a new location. Microsoft has completely disabled this feature.

## ***Adding and removing buttons***

By default, the Quick Access toolbar includes these three buttons:

- ◆ Save
- ◆ Undo
- ◆ Redo

This collection of buttons is minimalist. You don't have to think hard to come up with some other buttons that would be useful here, such as Open, Save As, New Document, or Print.

Fortunately, Word 2010 lets you add any number of buttons to the Quick Access toolbar. To add a button, just follow these simple steps:

**1. Click the arrow that appears to the right of the Quick Access toolbar.**

This step displays a menu that includes some of the most popular choices to include on the Quick Access toolbar.

**2. If the command you want to add appears in the menu, click it and skip the rest of this procedure.**

The command is added to the Quick Access toolbar, and you're done.

**3. If the command you want to add isn't on the menu, choose More Commands.**

This step selects the Quick Access Toolbar tab of the Word Options dialog box (refer to Figure 1-2).

**4. Choose a category from the Choose Commands From drop-down list that appears above the list of available buttons.**

This drop-down list lets you select buttons from any of several categories, including Popular Commands, Commands Not in the Ribbon, All Commands, and Macros.

**5. Select the button you want to add to the Quick Access toolbar.**

**6. Click the Add button and then click OK.**

The button is added to the Quick Access toolbar.

Here are a few additional tips for customizing the Quick Access toolbar:

- ◆ To remove a button from the Quick Access toolbar, right-click the button and choose the Remove from Quick Access Toolbar option.
- ◆ Another way to remove a button is to select the Quick Access Toolbar tab of the Word Options dialog box, select the button you want to remove in the list of buttons on the Quick Access toolbar, and click the Remove button.



- ◆ You can change the order of buttons on the Quick Access toolbar from the Quick Access Toolbar tab of the Word Options dialog box. First select a button from the list of buttons on the Quick Access toolbar, on the right side of the dialog box. Then use the Move Up and Move Down buttons (they're on the right side) to change the location of the selected button.
- ◆ The Popular Commands category includes the most commonly used buttons. You probably want to add several commands from this category to your Quick Access toolbar, including New, Open, and Quick Print.
- ◆ The Commands Not in the Ribbon category lists a variety of Word commands that don't appear on any Ribbon tabs. You can find more than a hundred interesting commands in this category.
- ◆ If you're not sure which category a command is in, you can choose the All Commands category.
- ◆ You can also assign a macro to a Quick Access toolbar button by choosing the Macros category. For more information about creating macros, see Book IX, Chapter 1.

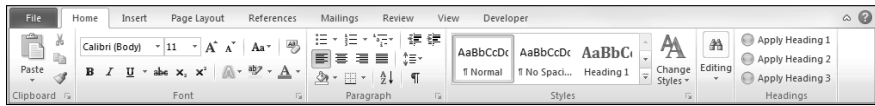
As you scroll through the Choose Commands From drop-down list, you might notice that the buttons shown in the Commands section of the dialog box are *context sensitive*: They change to indicate which buttons are available in a category. As you examine the categories, you see familiar buttons, such as New, Open, and Save. But you also find many unfamiliar buttons. These represent Word commands you didn't know existed because they aren't on any menus or toolbars by default.

## Customizing the Ribbon

When Microsoft abandoned its traditional menus and toolbars in favor of the Ribbon in Office 2007, one feature I missed the most was the ability to customize the user interface by creating my own toolbars and menus or by adding new commands to the existing toolbars and menus. Fortunately, Microsoft has remedied this deficiency in Word 2010: You can now customize the Ribbon interface by creating new tabs or by adding new groups to the existing tabs.

For example, Figure 1-3 shows a customized Home tab that includes a new group named Headings. This group includes three commands, which simply apply the Heading 1, Heading 2, and Heading 3 styles to the selected paragraph.

**Figure 1-3:**  
Customized  
Headings  
group.



To add to an existing Ribbon tab a new group such as the Headings group shown in the figure, follow these steps:

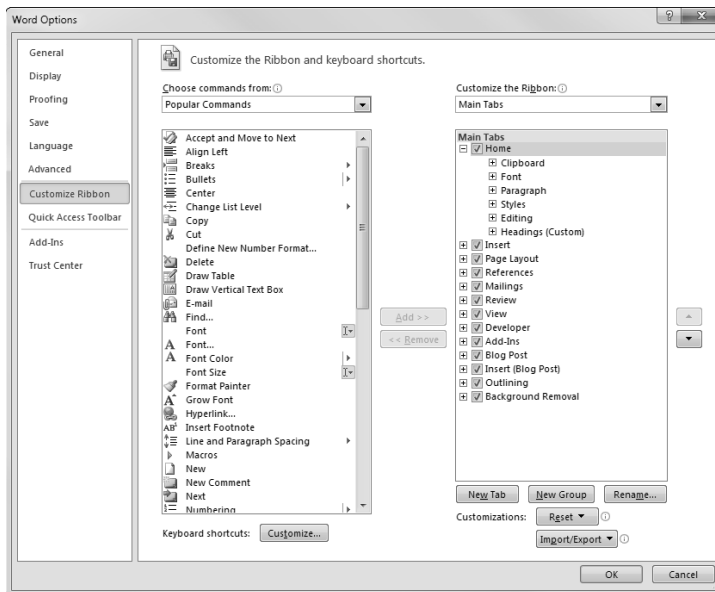
## 1. Choose File➔Options.

The Word Options dialog box appears.

## 2. Select the Customize Ribbon tab on the left side of the dialog box.

The Customize Ribbon tab appears, as shown in Figure 1-4. As you can see, this tab is similar to the Quick Access Toolbar tab but includes a few additional buttons.

**Figure 1-4:**  
The  
Customize  
Ribbon tab  
of the Word  
Options  
dialog box.



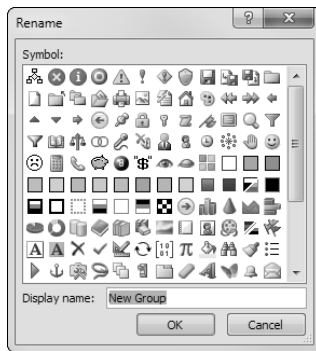
## 3. In the list box on the right side of the dialog box, select the Ribbon tab you want to add a group to and click New Group.

A new group is added to the list. The new group is given the inspiring name New Group (Custom).

## 4. Click the Rename button.

The Rename dialog box appears, as shown in Figure 1-5.

**Figure 1-5:**  
Renaming  
a Ribbon  
group.



**5. Ignore all the colorful symbols that appear in the Rename dialog box.**

The symbols don't apply to groups. The only thing you're interested in on the Rename dialog box is the Display Name text box and the OK button.

**6. Type an appropriate name for the new group in the Display Name text box and then click OK.**

The Rename dialog box is whisked away, and the generic New Group (Custom) group is renamed to the name you typed.

Don't worry about the (Custom) designation. It serves only to distinguish your custom groups from Word's built-in groups and isn't part of the name.



**7. If you don't like the location at which the group was inserted into the tab, click the up- or down-arrow buttons to move the new group up or down.**

After you name and position the new group properly, you can add buttons to it.

**8. Choose a category from the Choose Commands From drop-down list that appears above the list of available buttons.**

This drop-down list lets you select buttons from any of several categories. These categories include Popular Commands, Commands Not In the Ribbon, All Commands, and Macros.

**9. Select the button you want to add to your custom group and click the Add button.**

The button is added to the custom group.

**10. Repeat Steps 8 and 9 to add more buttons to the group.**

**11. Stop repeating Steps 8 and 9 when you're done adding buttons to the group.**

### 12. Click OK to apply your changes.

The Word Options dialog box disappears, and your changes to the Ribbon are immediately visible.

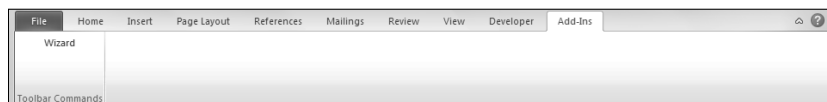
Here are a few additional points to ponder regarding customizing the Ribbon:

- ◆ Word lets you customize only new groups you have added to Ribbon tabs. You cannot add new commands to built-in groups.
- ◆ You can use the Remove button to remove a button from a custom group or to remove an entire custom group.
- ◆ You can use the up- or down-arrow buttons on the right side of the Customize Ribbon dialog box to change the position of buttons (and groups) on a custom tab.
- ◆ You can create an entirely new tab by clicking the New Tab button. The new tab, initially named New Tab, includes one group named New Group. You should use the Rename button to rename both the tab and the group. You can then use the up- and down-arrow buttons to change the position of your new tab on the Ribbon, and you can use the New Group button to create additional groups on your custom Ribbon.
- ◆ You can use the Import/Export button to export your Ribbon customizations to a file. Then you can use this same Import/Export button to import saved customizations to a different computer.
- ◆ You can also use the Reset button to restore a single tab or the entire Ribbon to their out-of-the-box default settings.

## *Dealing with Old-Style, Custom Toolbars*

Word 2003 and previous versions let you create custom toolbars. Although Word 2010 doesn't use toolbars in the same way as those versions did, it provides a way for you to access the custom toolbars you created for documents and templates in previous versions of Word. Old-style custom toolbars are displayed on the Add-Ins tab, as shown in Figure 1-6. In the figure, I've opened a document I created in Word 2003 that contains a custom toolbar with a single button, named Wizard.

**Figure 1-6:**  
Custom  
toolbar.



All custom toolbars in an old-style Word document are displayed together in a single group named Toolbar Commands. You have no way to turn the individual toolbars on or off and no way to drag them to a new location or dock them to the side. But at least the custom toolbars are accessible.

## Creating Custom Keyboard Shortcuts

If you're a keyboard shortcut junkie (as I am), you probably want to create your own keyboard shortcuts. Then you can assign to handy keyboard shortcuts the styles, macros, and other goodies you use most often.

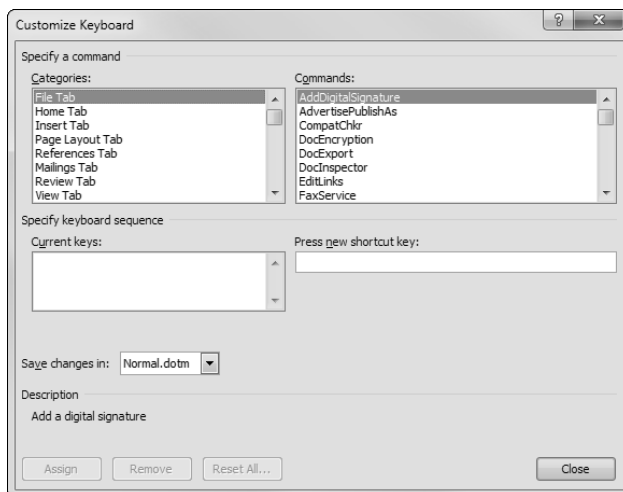
Follow these steps to assign a new keyboard shortcut:

**1. Open the Customize Ribbon tab in the Word Options dialog box.**

To open the dialog box, choose File→Options. Then click the Customize Ribbon tab. Refer to Figure 1-4 to see what this dialog box looks like.

**2. Click the Customize button.**

The Customize Keyboard dialog box appears, as shown in Figure 1-7.



**Figure 1-7:**  
The  
Customize  
Keyboard  
dialog box.

**3. Click a Category and then select the command, style, macro, or font or another item for which you want to create a keyboard shortcut.**

Spend some time exploring these lists. Lots of useful commands are buried amongst a bunch of strange-looking gobbledygook. You can create a shortcut for any command, style, macro, font, or just about any other item.

4. **Click in the Press New Shortcut Key text box and then type the new keyboard shortcut.**

When you type the shortcut, Word lets you know whether the key is already assigned to another command.

5. **Click Assign to assign the keyboard shortcut. Then click Close.**

You're finished! Try the shortcut to see whether it works.



You can also assign a keyboard shortcut to a style. Open the Styles window by clicking the Styles button in the lower-right corner of the Styles group on the Home tab on the Ribbon. Select the style you want to assign a keyboard shortcut to and then click the down arrow to reveal its shortcut menu. Choose Modify and then click the Format button to reveal the formatting shortcut menu for the style. Then choose the Shortcut Key command to create your keyboard shortcut.

## ***Resetting keyboard shortcuts***

You can erase all keyboard shortcuts stored in a template by following these steps:

1. **Open the Customize Keyboard dialog box.**  
For the steps on how to open this dialog box, refer to the preceding section.
2. **Click the Reset All button.**
3. **When the confirmation dialog box appears, click Yes.**
4. **Click the Close button.**

If you have keyboard shortcuts saved in both `Normal.dotm` and the template attached to the current document, you need to use Reset All for both templates to revert completely to Word's default keyboard shortcuts. And, to make the return to default shortcuts permanent, you must save the template file as well. (See Book I, Chapter 3 for more on templates.)

## ***Printing your keyboard shortcuts***

If you lose track of your custom keyboard shortcuts, you can print a complete list of them for the current document by following these steps:

1. **Open a document that's attached to the template with the keyboard shortcuts you want to print, or open the template itself.**
2. **Choose File⇨Print to display the Print page in Backstage view.**

- 3. In the first drop-down list in the Settings section, select Key Assignments.**
- 4. Click Print.**

Keyboard assignments are printed, starting first with the keyboard assignments derived from the template attached to the document and listing the global keyboard assignments taken from the `Normal.dotm` template. Word's built-in keyboard shortcuts aren't printed; if they were, the listing would go on for many pages.





# *Chapter 2: Opting for Options*

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## *In This Chapter*

- ✓ **Finding out what's up with all the Word options**
- ✓ **Personalizing Word**
- ✓ **Dealing with Display options**
- ✓ **Perusing the Proofing options**
- ✓ **Setting the Save options**
- ✓ **Adjusting the Advanced options**
- ✓ **Looking at other Word options**

**S**ometimes I long for the old pre-Windows days, when my favorite word processor was WordPerfect 4.2 and the only real options I had to worry about were whether to change its screen colors or take the afternoon off and catch a quick round of golf. My golf game fell all to pieces after I began using Word. Now I spend all my free time playing with the options in the Word Options dialog box, so I don't have any time left over for such luxuries as golf.

You should read this chapter when you finally decide to give in to the Word Options dialog box and you want to know what all those options do. This chapter describes the most useful options and, more importantly, tells you which options you can safely ignore so that you (unlike some people I know — me, for example) can catch up on your golf.

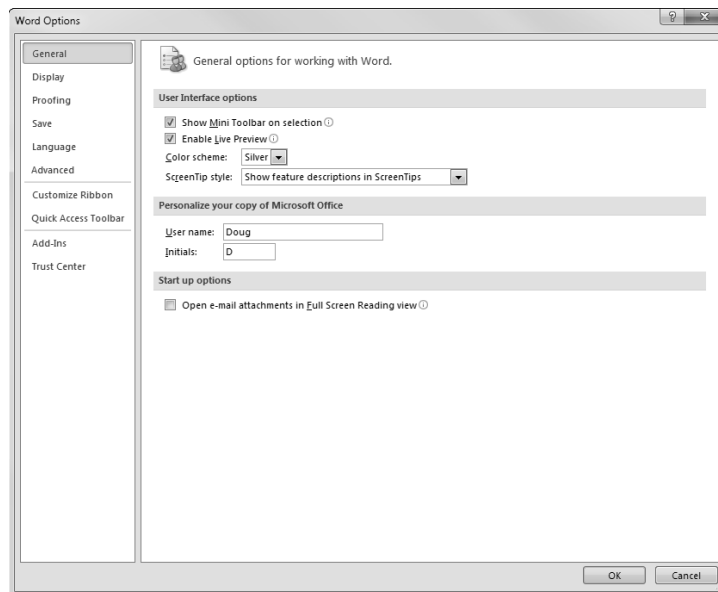
I'm aware, of course, that for many people, golf is a more frustrating game than playing with Word. And, for some, golf is more boring than reading Word's online help resources. If you're one of those poor, unenlightened souls, feel free to substitute your favorite nongolf pastime in the preceding paragraphs.

## *What's with All the Options?*

The Word Options dialog box is one of the most heavily laden dialog boxes of all time. It has so many options that it earned Microsoft the Lifetime Achievement Award from the American Society of Windows Programmers.

Like many other dialog boxes in Word, the Word Options dialog box (choose File→Options) organizes its settings into tabs. Each tab has its own set of option controls. To switch from one tab to another, just click the tab label on the left side of the dialog box. (Unlike many other Word dialog boxes, the tabs for the Word Options dialog box appear on the left side of the dialog box rather than at the top.)

Most Word dialog boxes that use tabs have two or three tab labels, but the Word Options dialog box has ten — that's right, *ten* — tabs, as shown in Figure 2-1.



**Figure 2-1:**  
The General  
tab of  
the Word  
Options  
dialog box.

- ◆ **General:** The most popular options for working with Word.
- ◆ **Display:** Contains options that control the way your document is displayed onscreen and how your documents print.
- ◆ **Proofing:** Controls the proofing tools such as the spell checker and the AutoCorrect feature.
- ◆ **Save:** Has important options that control the way Word saves your documents.
- ◆ **Language:** Lets you choose your editing language.
- ◆ **Advanced:** Contains a hodgepodge of options that control features Microsoft considers to fit in the Advanced category. Unfortunately, Microsoft has inexplicably placed options there that it considers advanced even if the option would more logically be placed on one of

the other tabs. For example, you can find on this tab (rather than on the Display tab) options that affect the way documents are displayed or printed. And several options that affect how files are saved are set here rather than on the Save tab. Go figure.

- ◆ **Customize Ribbon:** Lets you customize the Ribbon, as described in Chapter 1 of this minibook.
- ◆ **Quick Access Toolbar:** Where you customize the Quick Access toolbar. For more information, turn to Chapter 1 of this minibook.
- ◆ **Add-Ins:** Lets you activate a variety of cool add-in features.
- ◆ **Trust Center:** Contains security information and lets you access the Trust Center dialog box, where you can change various security settings.

To set options in Word, follow these steps:

**1. Choose File⇨Options.**

The Word Options dialog box opens (refer to Figure 2-1).

**2. Click the tab that contains an option you want to change.**

If you're unsure which tab contains the option you're looking for, just cycle through the tabs until you find the option.

**3. Set the option however you want.**

Most options are simple check boxes that you click to select or deselect. Some require you to select a choice from a drop-down list, and some have the audacity to require that you type a filename or otherwise demonstrate your keyboard proficiency.

**4. Repeat Steps 2 and 3 until you exhaust your options or until you're just plain exhausted.**

**5. Click OK.**

You're done!



As you fritter away your day playing with these tabs, keep the following points in mind:

- ◆ Several of the Word Options tabs have more than one road that leads to them. You can reach the Print Options section of the Display tab, for example, by choosing File⇨Print, clicking the Page Setup link, and then clicking the Print Options button on the Paper tab.
- ◆ As big as the Word Options dialog box is, it still isn't big enough to hold all Word options. As a result, some Options tabs have buttons that open additional dialog boxes that have additional tabs. Sheesh!
- ◆ To move to a tab, just click the tab label. You can also move from tab to tab by pressing the arrow keys. To move from the General tab to the Display tab, for example, press the down-arrow key.

## The ten best options in Word

Direct from the home office in sunny Fresno, California, here are my top ten favorite options:

- 1. Save AutoRecover Information (Save tab):** This option can be a lifesaver. Set it to save your work every five minutes or so, and you don't have to worry about losing an entire day's work because of a power failure.
- 2. Use Smart Cut and Paste (Advanced tab):** No more worrying about whether the space is before or after the text cut to the Clipboard. This option handles that worry for you. In fact, the good people at Microsoft turn this option on by default.
- 3. Paragraphs Marks and Tab Characters (Display tab):** Display paragraph marks and tab characters.
- 4. When Selecting, Automatically Select Entire Word (Advanced tab):** Without this option, you have to select an entire word and then press Ctrl+B or Ctrl+I to make the word bold or italicized. With this option set, you can just put the cursor anywhere in the word (or select portions of two or more words), and any formatting you apply is applied to the entire word (or all words).
- 5. Show This Number of Recent Documents (Advanced tab):** Avoid navigating the Open dialog box. Set it to as high a number as you can tolerate.
- 6. Print in Background (Advanced tab):** Why wait for the computer while it prints? With this option turned on (which it is by default), Word prints in the background while you do other work.
- 7. Embed Fonts in the File (Save tab):** Save fonts with the file so that another user who doesn't have the font installed can use the document. Of course, this option works only if the license for the fonts permits sharing.
- 8. File Locations (Advanced tab):** Open a dialog box that lets you set the locations of various Word files, including the location where documents are stored by default and a network location where users of the network can share templates.
- 9. Update Fields Before Printing (Display tab):** Use this option to ensure that fields (such as dates) are always updated whenever the document is printed.
- 10. Eighteen holes of golf:** Better than the other nine options put together.



Some settings that a normal person would consider *options* are located elsewhere on the Ribbon. For example, the option that controls whether the Ruler is displayed is found on the View tab on the Ribbon, not in the Word Options dialog box.

## The General Tab

The General tab (refer to Figure 2-1) features the most popular options for working with Word. These options are described in the following sections.

## User interface options

This group of options controls the appearance of the Word user interface.

- ◆ **Show Mini Toolbar on Selection:** When this option is selected, a special toolbar (the *Mini toolbar*) is displayed whenever you select text. This toolbar lets you set the most common formatting options, such as the font, size, bold, italic, and color.
- ◆ **Enable Live Preview:** Show a preview of how various Word features will affect your document when you hover the cursor over different choices.
- ◆ **Color scheme:** Lets you choose one of several different color schemes. The color schemes affect the colors used to display the Ribbon, dialog box borders, and other elements of the Word user interface.
- ◆ **ScreenTip Style:** Control whether ScreenTips are displayed. (A *ScreenTip* is the little help box that appears whenever you hover the mouse for a moment over an item on the Ribbon.)

## Personalize your copy of Microsoft Office

This section of the General tab lets you personalize your copy of Office by supplying your name and initials and the language you want to work with. This information is used in several ways:

- ◆ In the document properties when you save a document
- ◆ In comments and in revision marks when you track changes
- ◆ On envelopes, labels, and letters

## Start-up options

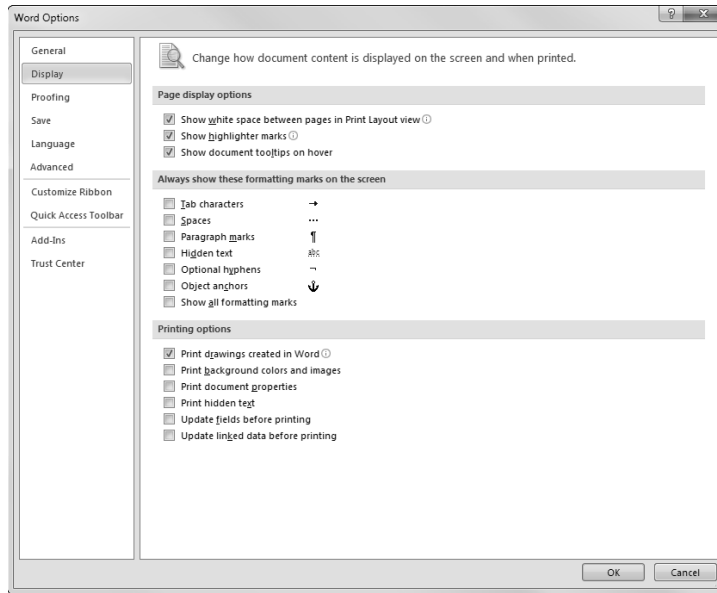
The General tab has only one start-up option:

- ◆ **Open E-Mail Attachments in Full Screen Reading View:** When this option is enabled, Word documents sent as e-mail attachments open in Reading view. Personally, I'm not a fan of Reading view, so I usually disable this option.

## The Display Tab

The options on the Display tab, shown in Figure 2-2, let you customize the appearance of the humble Word display.

**Figure 2-2:**  
The Display  
tab.



The Display options are arranged in three groups:

- ◆ Page Display Options
- ◆ Always Show These Formatting Marks on the Screen
- ◆ Printing Options

## *Page Display Options*

The Display options grouped under the Page Display Options heading control the amount of detail displayed in the document window. The following list gives you the lowdown on each of the options you can set from this tab:

- ◆ **Show White Space between Pages in Print Layout View:** This option displays the space between pages in Print Layout view. Otherwise, you don't see the white space created by margins.
- ◆ **Show Highlighter Marks:** Deselect this option to turn off the highlighting made by Word's Highlight feature. Note that the highlighting isn't removed — it just isn't shown. This option can be helpful if you want to highlight something onscreen but not in the printout.
- ◆ **Show Document Tooltips on Hover:** Select this option to enable tips that appear when you hover the cursor over certain Word items, such as comments or hyperlinks.

## Always Show These Formatting Marks on the Screen

This group of options lets you control which special characters are displayed in the document window:

- ◆ **Tab Characters:** Displays tab characters as an arrow. I usually leave this option selected so that I can keep track of tabs.
- ◆ **Spaces:** Displays spaces as little dots. I usually leave this option deselected, but some people like to see the little dots so that they can tell where they type spaces.
- ◆ **Paragraph Marks:** Displays paragraph marks. I usually leave this option selected so that I can quickly find extraneous paragraphs.
- ◆ **Hidden Text:** Displays *hidden* text, or text in your document that isn't printed. It's marked as hidden via the Font dialog box. (For more information, see Book II, Chapter 2.)
- ◆ **Optional Hyphens:** Displays optional hyphens, which are helpful when you want precise control over hyphenation.
- ◆ **Object Anchors:** Shows the anchors that tie objects to a specific location in your document.
- ◆ **Show All Formatting Marks:** Displays all hidden characters. Selecting this option is the same as clicking the Show/Hide button on the Home tab on the Ribbon.



When you press the Show/Hide button on the Ribbon, all nonprinting characters are displayed. When the button isn't depressed, only those nonprinting characters specified on the View tab are displayed. Set the options on the View tab so that only those nonprinting characters you *always* want to display — such as tab characters and paragraph marks — are selected. You can display the other nonprinting characters at any time by simply clicking the Show/Hide button.

## Printing Options

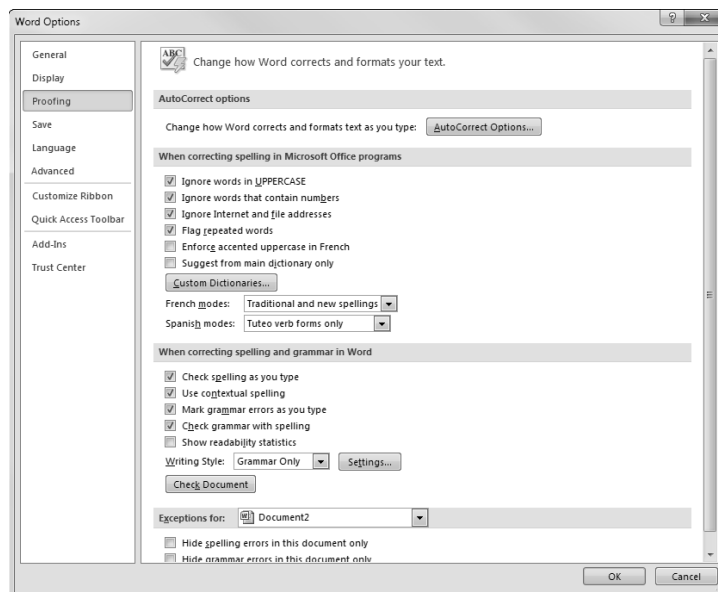
This section describes several options that affect how documents are printed. Specifically:

- ◆ **Print Drawings Created in Word:** If you turn off this option, the document's text is printed, but any graphics are not printed.
- ◆ **Print Background Colors and Images:** Turn on this option if you want to print the page background color or image. Leave this option off if you're printing on colored or preprinted paper.
- ◆ **Print Document Properties:** If you want document properties to print as a separate page, select this option.

- ◆ **Print Hidden Text:** Select this option to print text that has been marked as hidden.
- ◆ **Update Fields before Printing:** Updates the contents of fields before printing. I recommend turning on this option. (For more information, see Chapter 3 of this minibook.)
- ◆ **Update Linked Data before Printing:** Likewise, this option should also be turned on. For instance, if you link a table in Word to an Excel spreadsheet, leaving this option turned on ensures that the most up-to-date information in the Excel spreadsheet is included in your Word table.

## *The Proofing Tab*

Figure 2-3 shows the Proofing tab of the Word Options dialog box, which lets you control the way the various Office proofing tools work. Because the settings on this tab are covered elsewhere in this book, I don't belabor them here. For more information about setting AutoCorrect options, please see Book II, Chapter 5. For more information about the spelling and grammar options, please see Book II, Chapter 6.

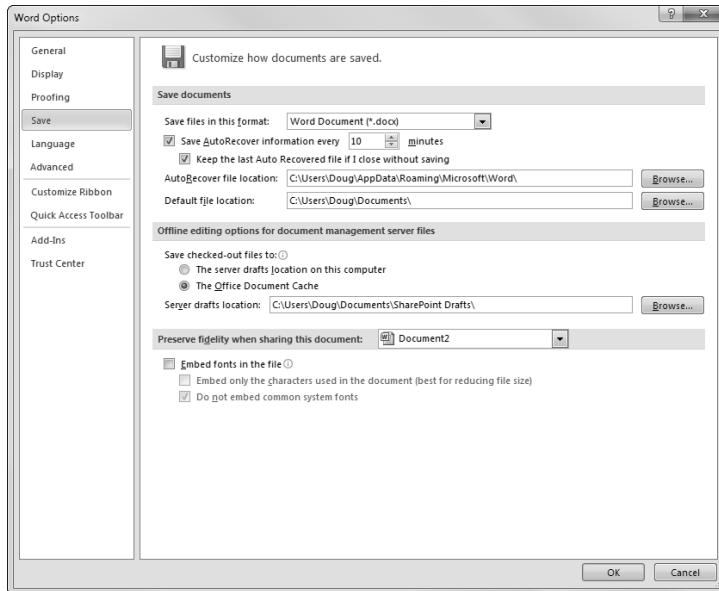


**Figure 2-3:**  
The  
Proofing  
tab.



## The Save Tab

Figure 2-4 shows the Save tab, which lets you specify how you want documents to be saved. The following sections describe the options on this tab.



**Figure 2-4:**  
The Save  
tab.

## Save Documents

This section contains basic options for how files are saved:

- ◆ **Save Files in This Format:** Specifies the default format for saving Word files. This option is initially set to Word Document (\*.docx) to save files in the new Word 2010 format.
- ◆ **Save AutoRecover Information Every *N* Minutes:** Automatically saves recovery information at regular intervals. The default setting is to save the recovery information every 10 minutes, but you can change the time interval if you want. I like to set it for 5 minutes.
- ◆ **Keep the Last AutoRecovered File If I Close without Saving:** Comes into play if you close Word without saving your document. If the option is set, the most recent AutoRecover file is automatically saved. Leave this option turned on.

- ◆ **AutoRecover File Location:** Specifies the hard drive folder where AutoRecover files are stored. Rarely do you have a reason to change this option.
- ◆ **Default File Location:** This option sets the initial location for files when you use the Save command. It defaults to Documents, but you can change it to another location if you want.

### ***Offline Editing Options for Document Management Server Files***

If your company uses a document management server (such as SharePoint), you can use these options to configure how it works. Usually, you should leave these options unchanged.

### ***Preserve Fidelity When Sharing This Document***

The lone option in this section, Embed Fonts in the File, lets you specify whether to include TrueType font files in your documents. Embedding the fonts in the document increases the size of the document file, so this option is usually left deselected. However, if you intend to share the file with other users and you use uncommon fonts in the document, you should select this option. (As for the two check boxes beneath this option, leave them set as they are.)

## ***The Language Tab***

On the Language tab, shown in Figure 2-5, you can specify the language you want to use when you work in Word. As you can see, you can specify three settings on this tab:

- ◆ **Choose Editing Languages:** Choose the language your document is written in. The default choice is English, but you can use the drop-down list to add editing languages.
- ◆ **Choose Display and Help Languages:** Choose the language used by Word's user interface, which is helpful if you're working on a document in a language other than your own, native language.
- ◆ **Choose ScreenTip Language:** Select an alternative language for ScreenTips, those little boxes of helpful information that pop up when you hover the mouse over a user interface element.

## ***The Advanced Tab***

The Advanced tab, shown in Figure 2-6, is the catch-all tab of the Word Options dialog box. It contains a plethora of options — so many, in fact,

that Figure 2-6 shows only about one fourth of them. The following sections describe all the options on the Advanced tab.

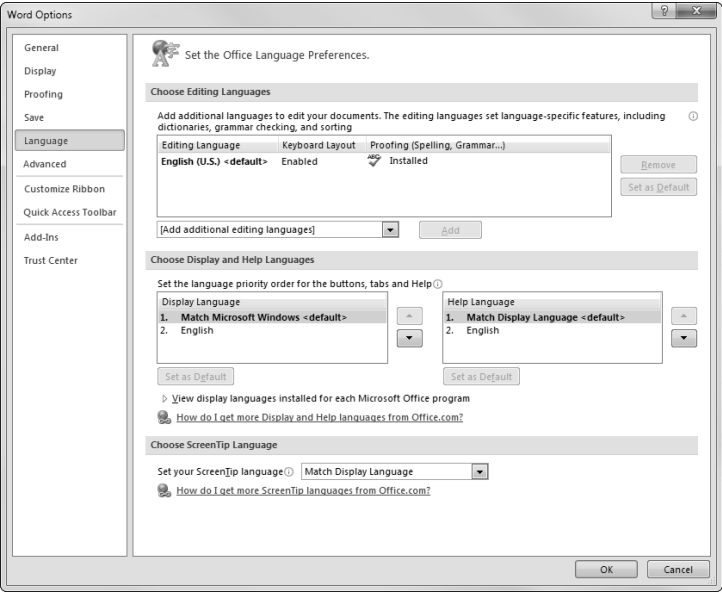


Figure 2-5:  
The  
Language  
tab.

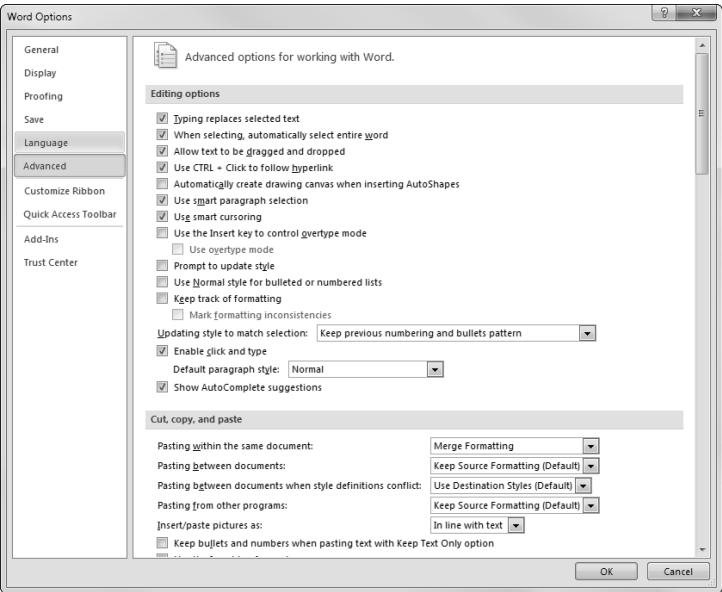


Figure 2-6:  
The  
Advanced  
tab.

## *Editing Options*

The Editing Options section contains the following options that affect the way you can edit documents:

- ◆ **Typing Replaces Selected Text:** If you highlight text by dragging the cursor over it or by holding down the Shift key while moving the cursor and then type something, the whatever-it-was-you-typed obliterates the whatever-it-was-you-highlighted. If this behavior drives you bonkers, you can turn it off by deselecting the Typing Replaces Selected Text check box.
- ◆ **When Selecting, Automatically Select Entire Word:** This option is one of the niftiest features in Word. It causes Word to assume that you meant to select an entire word. This tool can be disconcerting at first, though, so be prepared. If it's against your religion, you can turn it off by deselecting the When Selecting, Automatically Select Entire Word check box.
- ◆ **Allow Text to Be Dragged and Dropped:** More commonly known as "dragon dropping," this option lets you move text by selecting it and then dragging it with the mouse. If it annoys you, turn it off by deselecting this check box.
- ◆ **Use Ctrl+Click to Follow Hyperlink:** If you select this option, the usual clicking action doesn't automatically activate a hyperlink.
- ◆ **Automatically Create Drawing Canvas When Inserting AutoShapes:** If this option is on, Word automatically creates a Drawing Canvas object whenever you insert a shape into your documents. This option is off by default and should be left off.
- ◆ **Use Smart Paragraph Selection:** Keep paragraph formatting intact when you cut and paste paragraphs.
- ◆ **Use Smart Cursoring:** This option automatically moves the insertion point as you scroll your document by using the scrolling keys (such as Page Up or Page Down).
- ◆ **Use the Insert Key to Control Overtyping Mode:** If this option is selected, the Insert key switches from Overtyping mode to Insert mode. In Overtyping mode, anything you type replaces text that's already on the screen. If you want to insert content in the middle of a paragraph and you care whether the text that's already there *stays* in your document, you want Word in Insert mode as much as possible.
- ◆ **Use Overtyping Mode:** Speaking of Overtyping mode, sneak into someone's office late at night, click File⇨Options, and then select this option. Then let out an evil laugh when he shouts obscenities every time he starts up Word and doesn't discover until it's too late that it's in Overtyping mode.



I don't know what got into me. Don't, under any circumstances, do this. Please. Playing with other people's computers isn't nice.

- ◆ **Prompt to Update Style:** If this option is on, Word asks what you want to do if you modify the format of some text and then reapply the previously applied style. The prompt asks whether you want to revert to the formatting specified by the style or to update the style to reflect the new formatting.
- ◆ **Use Normal Style for Bulleted or Numbered Lists:** If this option is selected, bulleted or numbered lists are formatted using the Normal paragraph style. Best leave this one at its default.
- ◆ **Keep Track of Formatting:** This option tells Word to automatically create a style every time you apply formatting. This feature is cool because you can then modify the style to make consistent changes to your document. On the other hand, Word can go a little overboard in creating styles. You might find that your style list fills up with dozens of styles that Word created as it tracked every little formatting change you made.
- ◆ **Mark Formatting Inconsistencies:** If this option is selected, text that's formatted similar to but not exactly like other text in the document is marked with a wavy blue underline.
- ◆ **Updating Style to Match Selection:** Controls the behavior of bullet and numbering patterns when you update a style to match the selection. (For more information on styles, see Book II, Chapter 3; for more information on bullets and numbered lists, see Book III, Chapter 3.)
- ◆ **Enable Click and Type:** This option enables the Click and Type feature, which lets you place text anywhere on a page by double-clicking where you want to place the text and typing. Word automatically adds paragraphs or tabs necessary to position the text at the right place.
- ◆ **Default Paragraph Style:** Sets the default paragraph style for new paragraphs created with the Click and Type feature. Best to leave it set to Normal.
- ◆ **Show AutoComplete Suggestions:** Deselect this option to turn off the AutoComplete feature.

## Cut, Copy, and Paste

The Cut, Copy, and Paste options affect the way the Clipboard works:

- ◆ **Pasting within the Same Document:** Lets you pick one of three behaviors for pasting text that's cut or copied from one location of a document and pasted to another location within the same document. The three choices are

- *Keep Source Formatting*: Retains the formatting applied to the original text.
- *Merge Formatting*: Matches the formatting of the pasted text to the formatting of text where it is pasted but retains certain formatting elements, such as bold and italic.
- *Keep Text Only*: Applies no formatting to the pasted text.
- ◆ **Pasting between Documents**: The same three choices exist for copying or cutting text from one document and pasting it into another.
- ◆ **Pasting between Documents When Style Definitions Conflict**: Determines how style formatting is handled when text is copied or cut from one document and pasted into another and the styles in the two documents specify different formatting.
- ◆ **Pasting from Other Programs**: Specifies how formatting is handled when text is copied or pasted from a program other than Word.
- ◆ **Insert/Paste Pictures As**: Specifies the default layout option to use for pasted pictures.
- ◆ **Keep Bullets and Numbers When Pasting Text with Keep Text Only Option**: Hmm. This one is obscure. If you specify Keep Text Only for one of the previous pasting options, this option determines whether bullets or numbers are considered part of the text or just formatting. If you select this option, the bullet or number is pasted. If this option is deselected, bullets or numbers aren't pasted.
- ◆ **Use the Insert Key for Paste**: If you select this option, the Insert key serves as a handy shortcut for the Paste command.
- ◆ **Show Paste Options Button When Content Is Pasted**: This option displays a Paste Options button at the bottom corner of text you paste into your document. You can click this button to reveal a menu of options for formatting the pasted text.
- ◆ **Use Smart Cut and Paste**: Adjusts spaces before and after text you cut and paste so that you don't end up with two spaces between some words and no spaces between others. Leave this option selected; it's too good to turn off.

## *Image size and quality*

This section contains options that affect how images are saved in your documents. There are three such options:

- ◆ **Discard Editing Data**: If this option is selected, any information about how the image was previously edited is discarded when you save the document.

- ◆ **Do Not Compress Images in File:** If this option is deselected, images are automatically compressed when you save the document. This process reduces the document's file size, which is especially important if the document contains a large number of images.
- ◆ **Set Default Target Output To:** This option sets the resolution of your document's intended output device. The default setting is 220 pixels per inch (ppi). You can increase this setting if you want your images to print in higher quality, but doing so increases the file size.

## Show Document Content

The following options, located in the Show Document Content section, let you refine the way Word documents are displayed:

- ◆ **Show Background Colors and Images in Print Layout View:** If you want to see page backgrounds in Print Layout view, leave this option selected.
- ◆ **Show Text Wrapped within the Document Window:** You should leave this option deselected if you want the text wrap to reflect the way the document will print (which you probably do). If page count is an issue in the work you do, selecting this option will give you a migraine.
- ◆ **Show Picture Placeholders:** If you insert a picture into a document, you notice that Word hesitates a little when you scroll the picture into the document window. If you add 200 pictures to a document, the hesitations might come so often that you want to scream. Selecting this option causes Word to display a simple rectangle where the picture will be placed. This step eliminates the hesitation but of course hides the pictures so that you can't see what they look like until you print the document.
- ◆ **Show Drawings and Text Boxes on Screen:** You can deselect this option to hide any drawings or text boxes in your document. I don't know why you would, though, unless you're using a slow computer that's barely able to display the drawings and text boxes in your document.
- ◆ **Show Text Animation:** This option enables text animation effects.
- ◆ **Show Bookmarks:** Sandwich between gray brackets the text referred to in a bookmark.
- ◆ **Show Text Boundaries:** Display faint lines that indicate the boundaries within which text will be placed. This option is often very helpful.
- ◆ **Show Crop Marks:** This option has nothing to do with cropping pictures. Instead, *crop marks* are little lines that print in the corners of the page to indicate where the page should be physically cut to fit the margins.

- ◆ **Show Field Codes instead of Their Values:** Shows the codes inserted for each field rather than the results of the field. Use this option when you're struggling with a maniacal mail merge. For more information, see Chapter 3 of this minibook.
- ◆ **Field Shading:** You might apply shades to a field to draw attention to them. You can set this option to
  - *Never:* Never shades field results
  - *Always:* Always shades field results
  - *When Selected:* Shades field results only when some (or all) of the field is selected
- ◆ **Use Draft Font in Draft and Outline Views:** Choose this option if you want to display text in a standard font (usually Courier New) when the document is viewed in Draft or Outline view. The main reason for this feature is to help you focus on your document's content rather than on its appearance. You should consider using this option if you spend most of your time playing with fonts instead of improving your prose.
- ◆ **Font Substitution:** Opens a dialog box that lets you assign fonts to use whenever a document refers to a font that isn't present on your computer. You can usually just ignore this setting and let Word decide how to substitute missing fonts on its own.

## Display

The options in the Display section control various aspects of Word's display:

- ◆ **Show This Number of Recent Documents:** Tell Word how many files to list in Backstage view. The default is 20.
- ◆ **Show Measurements in Units Of:** In case you don't like inches, you can change Word's measurements to centimeters, millimeters, points, picas, fathoms, leagues, cubits, or parsecs.
- ◆ **Style Area Pane Width in Draft and Outline Views:** The style area pane appears at the left side of the screen in Draft and Outline view and indicates the style assigned to each paragraph. You can adjust its width by dragging its border, or you can use this option to set the width. Set this option to 0 if you want to hide the style area pane.
- ◆ **Show Pixels for HTML Features:** Make pixel the default choice for the measurement unit for Web documents.
- ◆ **Show All Windows in the Taskbar:** Specify that each document should get its own icon in the taskbar.
- ◆ **Show Shortcut Keys in ScreenTips:** Specify that ScreenTips should show shortcut keys whenever appropriate.



- ◆ **Show Horizontal Scroll Bar:** Show the scroll bar at the bottom of the screen. If you discover one day that you've been using Word for two years and didn't know that a horizontal scroll bar was available, deselect this option to free up more space to display your document.
- ◆ **Show Vertical Scroll Bar:** If your text is just a wee bit wide for the screen, consider deselecting the Show Vertical Scroll Bar option, at the right edge of the window, to remove the scroll bar. This action frees up a little space, and you can still press the Page Up and Page Down keys to scroll through your document.
- ◆ **Show Vertical Ruler in Print Layout View:** Indicate whether a vertical ruler should be displayed when you're working in Print Layout view. This option is on by default.
- ◆ **Optimize Character Positioning for Layout Rather Than Readability:** Specify how Word decides the exact positioning of characters.
- ◆ **Disable Hardware Graphics Acceleration:** If you're having odd problems with your screen display, checking this option might improve the situation.

## Chart

The two options in the Chart section control how charts are handled:

- ◆ **Insert Charts Using Draft Mode:** If you check this option, charts are inserted in draft mode. For more information about working with charts, refer to Book IV, Chapter 3.
- ◆ **Hide Draft Mode Notification on Charts:** Hide the icon that lets you know the chart is displayed in Draft mode.

## Print

The Print section of the Advanced tab displays several options that let you control printing. To wit:

- ◆ **Use Draft Quality:** Prints the document in draft format, with little formatting. This option can result in faster printing and can save ink because draft quality usually uses less ink than final quality.
- ◆ **Print in Background:** Speeds printing and allows you to continue working while a long document is printing. I suggest that you leave this option on.
- ◆ **Print Pages in Reverse Order:** Prints the document backward, starting with the last page in your document. This option is useful if your printer stacks printed pages in the wrong order.

- ◆ **Print XML Tags:** Prints any XML codes in your document if this option is set.
- ◆ **Print Field Codes Instead of Their Values:** Prints field codes rather than field results. Use this option only if your document is filled with fields and you're trying to figure out why they aren't working right.
- ◆ **Allow Fields Containing Tracked Changes to Update Before Printing:** Controls whether fields are automatically updated when editing changes are tracked.
- ◆ **Print on Front of the Sheet for Duplex Printing:** Sets the order of pages on the front of each sheet. Normally, odd-numbered pages are printed in order on the top of each page. Select this option to reverse the print order of odd-numbered pages.
- ◆ **Print on Back of the Sheet for Duplex Printing:** Normally, prints in order on the back of each page.
- ◆ **Scale Content for A4 or 8.5 x 11" Paper Sizes:** Automatically adjusts the document to fit these paper sizes if this option is selected.
- ◆ **Default Tray:** Lets you specify the default tray to use.
- ◆ **Print PostScript Over Text:** An option that's important only if you're converting documents from Macintosh Word format. In that case, turn this option on.
- ◆ **Print Only the Data from a Form:** If your document contains a form and you're printing on preprinted form paper, prints just the data rather than the form itself.

## *Save*

This section contains a few options that aren't on the Save tab:

- ◆ **Prompt before Saving Normal Template:** If you select this option, Word asks your permission before it saves any changes to the Normal template.
- ◆ **Always Create Backup Copy:** This option isn't nearly as useful as you might think, especially if you frequently save your documents, which you should. Still, it's a good safety net, so I recommend it.
- ◆ **Copy Remotely Stored Files onto Your Computer, and Update the Remote File When Saving:** This option can improve performance when you're working over a network. In some cases, the performance improvement is significant. So I recommend leaving this option selected.
- ◆ **Allow Background Saves:** Use this option if you work on large documents that take a long time to save. Avoid it if your documents are small and save quickly.

## *Preserve Fidelity When Sharing This Document*

These options provide additional control over data that's stored with the document. Specifically, you can choose to save the following information with the document:

- ◆ Smart tags in XML format
- ◆ Form data as a delimited text file
- ◆ Linguistic data
- ◆ Embedded smart tags

## *General*

Finding a section of General options in the middle of a huge collection of Advanced options seems a little backward to me, but here they are nevertheless:

- ◆ **Provide Feedback with Sound:** Causes Word to beep, boop, and otherwise chortle whenever it needs to get your attention. Turn this option on if you want to constantly remind your neighbors that you haven't yet mastered Word.
- ◆ **Provide Feedback with Animation:** Lets Word show off by displaying clever animations when you perform certain actions, such as saving files or printing.
- ◆ **Confirm File Format Conversion on Open:** Not a religious awakening; instead, merely instructs Word to ask for your consent before opening a document created by another program.
- ◆ **Update Automatic Links at Open:** Automatically updates any files that are linked to a document when you open the document. Leaving this option on is usually best.
- ◆ **Allow Opening a Document in Draft View:** Displays documents in Draft view when you open them.
- ◆ **Enable Background Repagination:** Ever notice that when you take a breather from your sustained typing rate of 90 words per minute, Word sometimes causes page breaks to dance about? This dance is Word's Background Repagination feature at work, constantly surveying the length of your document and inserting page breaks where they rightfully belong. If you deselect this check box, Word repaginates the document only when you print it; when you create a table of contents, an index, or another table; or when you work in Print Layout or Print Preview view.

Turning off Background Repagination might make your computer run a little faster, but you'll always wonder whether you're at the top or bottom of the page. I don't recommend it. (You can't turn off Background Repagination when you're in Page Layout view because that view requires page breaks to always be up-to-date.)

- ◆ **Show Add-In User Interface Errors:** Alerts you to errors in an add-in template's attempt to customize the user interface.
- ◆ **Show Customer Submitted Office.com Content:** An option you can leave deselected if you want to see only official Microsoft information when you browse the Microsoft Office.com Web site.
- ◆ **Mailing Address:** The spot where you enter your mailing address.

At the bottom of the General section, you find two buttons that open additional dialog boxes stuffed with options:

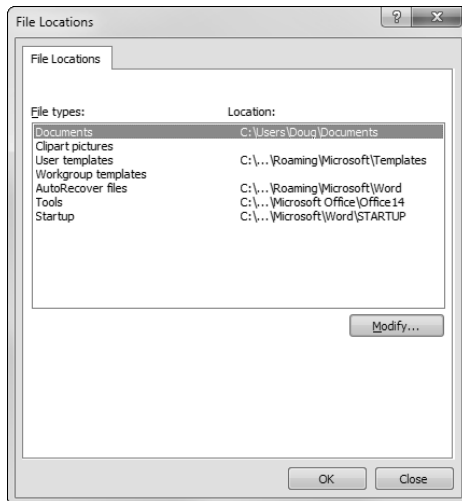
- ◆ **File Locations:** Opens the dialog box shown in Figure 2-7. This dialog box lets you change the location of various Word files, including
  - *Documents:* Change the default folder for the Open and Save As commands.
  - *Clipart Pictures:* If you have your own collection of clip art, you might want to modify this file location to make your clip art easier to find.
  - *User Templates:* Leave this option alone. It tells Word where it can retrieve templates.
  - *Workgroup Templates:* This option lets you set up a secondary location for template files.
  - *All the rest:* Leave the rest of the options alone.
- ◆ **Web Options:** Opens the dialog box shown in Figure 2-8, which lets you set various options related to how Word accesses the Web.

## ***Compatibility Options***

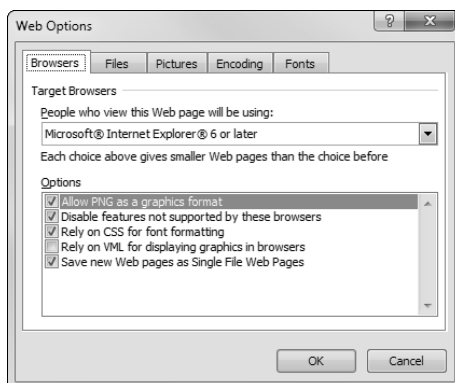
The last section on the Advanced tab lets you set backward compatibility for previous versions of Word or other word processing programs. You can set these compatibility options:

- ◆ Microsoft Word 2010
- ◆ Microsoft Office Word 2007
- ◆ Microsoft Office Word 2003
- ◆ Microsoft Word 2002
- ◆ Microsoft Word 2000

- ◆ Microsoft Word 97
- ◆ Microsoft Word 6.0/95
- ◆ Word for Windows 1.0
- ◆ Word for Windows 2.0
- ◆ Word for Macintosh 5.x
- ◆ Word for MS-DOS
- ◆ WordPerfect 5.x
- ◆ WordPerfect 6.x for Windows
- ◆ WordPerfect 6.0 for DOS



**Figure 2-7:**  
The File  
Locations  
dialog box.



**Figure 2-8:**  
The Web  
Options  
dialog box.



This section also includes the innocuous-looking button named Layout Options. If you click it, the already huge list of options shown on the Advanced tab expands to show more than 60 additional options that control how your document is laid out. These options let you revert specific features to the way they worked in previous versions of Word or in WordPerfect. I suggest that you avoid these options, if you can.

### *The Customize Ribbon and the Quick Access Toolbar Tabs*

The Customize Ribbon tab and the Quick Access Toolbar tab let you customize Word's user interface. For more information about working with this tab, read Chapter 1 of this minibook.

### *The Add-Ins Tab*

On the Add-Ins tab, you manage global templates and other types of add-ins. For more information about working with this tab, turn to Book I, Chapter 3.

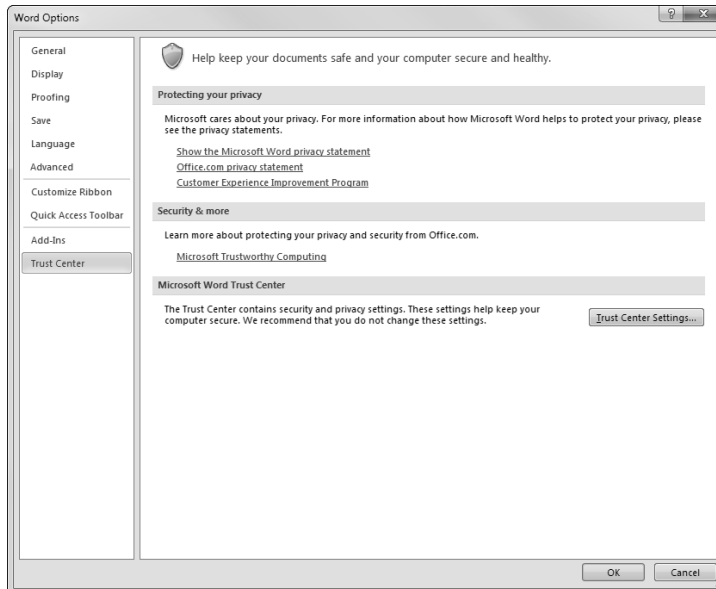
### *The Trust Center Tab*

The Trust Center tab, shown in Figure 2-9, lets you access several security-related features for Windows, Office, and Word. This tab includes links to several useful Web sites. In addition, you can click the Trust Center Settings button to reach the Trust Center dialog box, shown in Figure 2-10.

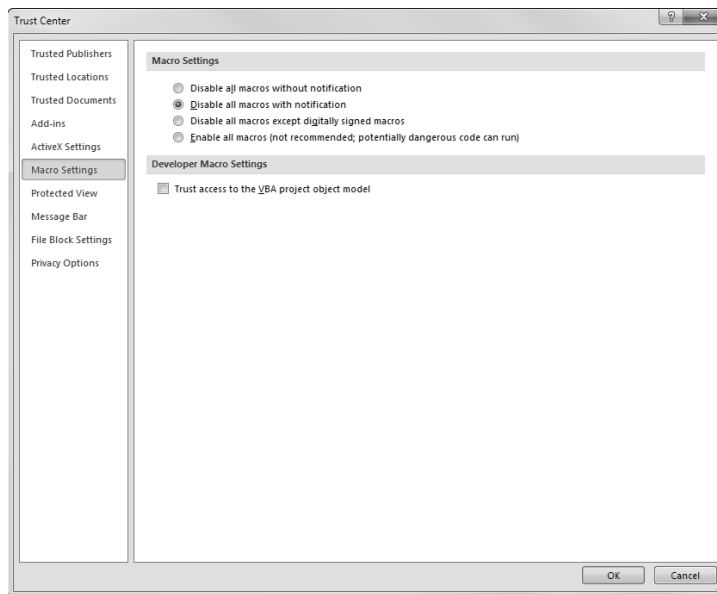
The Trust Center dialog box resembles the Word Options dialog box in that it has tabs that let you access specific security-related options. The tabs are

- ◆ **Trusted Publishers:** Identifies sources of add-ins that have been digitally signed and can therefore be trusted.
- ◆ **Trusted Locations:** Identifies file locations that contain files such as add-ins and templates you trust.
- ◆ **Trusted Documents:** Specifies whether documents you have opened and allowed macros for should be trusted in the figure.
- ◆ **Add-Ins:** Holds various security options for add-ins. You should leave these options at their default settings.

- ◆ **ActiveX Settings:** Holds security options for ActiveX controls. You should leave these options at their default settings.
- ◆ **Macro Settings:** Holds security options for macros. You should leave these options at their default settings.
- ◆ **Protected View:** Contains several options indicating that documents from suspicious locations (such as Web pages or e-mail attachments) should be opened in a special mode that doesn't allow editing. The user (that's you) must click a button that appears at the top of the screen to enable editing for the document. These options are turned on by default, but you can turn them off if you find the feature annoying.
- ◆ **Message Bar:** Lets you activate or deactivate the message bar, which notifies you when suspicious content has been blocked. You should leave these options at their default settings.
- ◆ **File Block Settings:** Prevents Word from opening or saving various types of file formats, such as older versions of Word or formats used by other word-processing programs.
- ◆ **Privacy Options:** Options that help protect your privacy. You should leave these options at their default settings.



**Figure 2-9:**  
The Trust  
Center tab.



**Figure 2-10:**  
The Trust  
Center  
dialog box.



# Chapter 3: Working with Fields

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## *In This Chapter*

- ✓ Customizing documents with the date, number of pages, and other values
- ✓ Taking shortcuts to the fields
- ✓ Formatting fields
- ✓ Updating and *not* updating fields
- ✓ Checking out all Word fields

A *field* is a special placeholder code that tells Word to insert something (usually text of some sort) into the document. A date field, for example, tells Word to insert the current date into the document. No matter when you edit or print the document, the date field causes the document to contain the current date.

Fields are everywhere in Word. Many of the commands you've come to know and love rely on fields to do their business. Fields let you insert the page number into a header or footer, create a table of contents or an index, and print mail-merged letters. These fields are often inserted into your document without your knowledge, as a result of your using another feature such as footnotes or indexes.

This chapter shows you what you need to know to insert fields directly, using the Quick Parts button on the Insert tab. Word provides many different types of fields (more than 70). At the end of this chapter is a table that lists them all.

## *Understanding Fields*

A *field* is a code that Word translates into a result, usually text, which is then inserted into the document. When you insert a date field, for example, you're saying to Word, "Insert the current date right here, and make sure that you get the date right. When I print this document, I want to see today's date. If I print it tomorrow, I want to see tomorrow's date. Next week, I want to see next week's date. A year from now. . . ." Get the idea? A date field is like a placeholder for an actual date, which Word inserts automatically. Other fields work in a similar way.

The text that Word inserts in place of the field code is the *result*. For a date field, the result is the current date. For a page-number field, the result is the current page number. Other field types produce more complicated results, such as a table of contents or an index. For some fields, the result isn't even text but is instead a picture or a chart.

When you print a document, you can't distinguish between text you typed directly into the document and text that's a field result. Consider, for example, the following text you may use in a letter:

As of today, Sunday, November 29, 2010, you have been banished from Remulak and sentenced to live out the remainder of your existence among the Blunt Skulls of Earth.

You can't tell that *Sunday, November 29, 2010* is a field result.

When you edit a document in Word, you must have a way to distinguish between regular text and field results. Word normally displays field results so that the document appears onscreen just as it does when you print it. If the result isn't quite what you expect, however, or if you want to make sure that you used the correct field to produce a result, you can switch the display to show field codes.

The preceding letter fragment with field codes displayed looks like this:

As of today, { TIME \@ "dddd, MMMM d, yyyy" }, you have been banished from Remulak and sentenced to live out the remainder of your existence among the Blunt Skulls of Earth.

The text marked by curly braces ({}), which are *field characters*, comprises the field. Their purpose in life is to tell Word that a field lives there. Though they look just like the curly braces you can type with the keyboard, they're not the same elements.

Sandwiched between the field characters is the field itself. Each field begins with a *field type* that tells you which type of field you have. In the preceding example, you're looking at a TIME field, which provides the current date or time in many different formats.

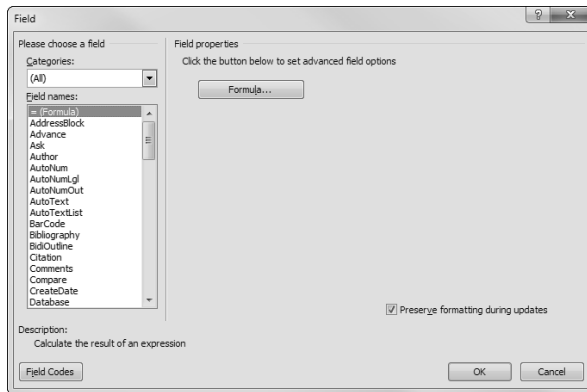
Following the field type are *instructions*, which tell the field what to do. The TIME field in the preceding example contains an instruction that tells Word how to format the time: *dddd, MMMM d, yyyy*.

## Inserting a Field

Follow these steps to insert a field in your document:

1. Move the insertion point to the spot where you want to insert the field.
2. On the Insert tab on the Ribbon, click the Quick Parts button, found in the Text group. Then choose Field from the menu that appears.

The Field dialog box appears, as shown in Figure 3-1.



**Figure 3-1:**  
The Field  
dialog box.

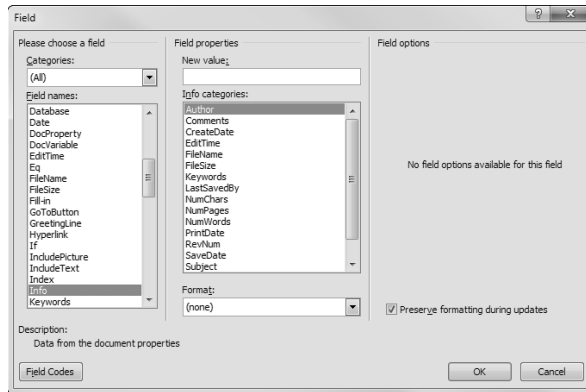
3. Select the field type you want to insert.

Because so many field types exist, Word breaks them down into categories so that you can find them more easily. First pick the category that contains the field you want to use. Then pick the field from the Field Names list box. If the field you want doesn't appear, try a different category. If you're not sure which category contains the field you want to insert, choose All as the category. This action lists all the Word field types in the Field Names list box.

4. Use the other controls in the Field dialog box to add more instructions required by the field.

I'd like to be more specific here, but I can't. The appearance of the Field dialog box changes when you select a field because each type of field accepts a different combination of options. For example, Figure 3-2 shows how the Field dialog box appears if you select Info field. The Field dialog box for an Info field includes a New Value text box, an Info Categories drop-down list, and a Format list.

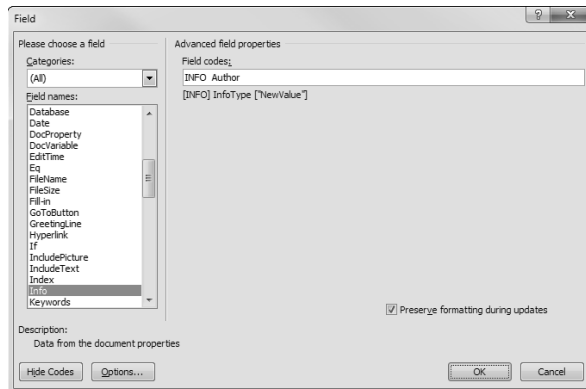
**Figure 3-2:**  
The Field  
dialog box  
changes  
when you  
select a  
field type.



## 5. Click OK to insert the field.

You can add more options to a field by clicking the Field Codes button in the Field dialog box and then clicking the Options button. The Field Options dialog box appears, as shown in Figure 3-3. The options presented in the dialog box vary depending on the field.

**Figure 3-3:**  
The Field  
Options  
dialog box.



You can add options to the field codes by choosing an option you want to add in the list and then clicking the Add to Field button. Every time you click the Add to Field button, the selected option is added to the Field Codes text box. Also, a terse description of each field option appears at the bottom of the Field Options dialog box.



When you insert a field, either the field code or the result is displayed, depending on whether the Field Codes view option is set. You can switch between field codes and field results by pressing Alt+F9 or by right-clicking the field and choosing the Toggle Field Codes command.

If you see a message such as `Error! Unknown switch argument` rather than the field result you expect, you made a mistake when you composed the field instructions. You have to edit the field directly by pressing Alt+F9 to reveal the field codes and then clicking in the field and typing your correction. (Or, once again, right-click the field and choose the Toggle Field Codes command.)

## Keyboard Shortcuts for Working with Fields

A bevy of specialized keyboard shortcuts are available for working with fields. Table 3-1 summarizes them for your convenience.

Table 3-1 Keyboard Shortcuts for Fields	
<i>Keyboard Shortcut</i>	<i>What It Does</i>
F9	Updates the selected field or fields.
Shift+F9	Switches the display between field codes and field results for the selected field or fields. You must place the insertion point in a field to use this command.
Alt+F9	Switches the display between field codes and field results for all fields in the document. You don't have to select a field before using this command.
Ctrl+F9	Inserts a blank field into a document.
Ctrl+Shift+F9	Converts a field to text (unlinks the field).
F11	Finds the next field in the document.
Shift+F11	Finds the previous field in the document.
Ctrl+F11	Locks a field so that it cannot be updated.
Ctrl+Shift+F11	Unlocks a field.

## Another Way to Insert Fields

If you're a whiz at typing commands, you can insert a field by typing it directly in your document. Just follow these steps:

1. **Position the insertion point where you want to insert the field.**
2. **Type the field name and instructions for the field you want to insert.**  
Don't worry about the curly braces for now. Just type the field and its instructions.
3. **Select the text you typed in Step 2.**
4. **Press Ctrl+F9.**

Ctrl+F9 converts the selected text to a field by enclosing it in field codes: those curly little braces that look just like the curly braces you can type with the keyboard but aren't the same thing at all.



If you prefer, you can reverse these steps: Position the insertion point where you want to place the field and press Ctrl+F9. An empty field appears, which you can select. Then you can type the field name and instructions within the braces. Or, you can right-click the empty set of braces and then choose Edit Field to open the Field dialog box. Then you can use the Field dialog box to choose the field name and the instructions.

## *Formatting Field Results with Switches*

Word provides several switches you can use on almost any field to control the formatting applied to the field result. You don't have to use any of these switches if you don't want to. If you omit them, Word makes an educated guess about the format of the field result.

You can use four switches to format a field's result:

- ◆ **The Mergeformat switch (\\* Mergeformat)** tells Word to preserve the formatting you include.
- ◆ **The Format switch (\\*)** tells Word whether to capitalize the field results and, for fields that produce numeric results, which type of numbers to create (Arabic or Roman numerals, for example).
- ◆ **The Numeric Picture switch (\#)** controls the format of numbers.
- ◆ **The Date-Time Picture switch (\@)** sets the format of dates and times.

Each of these switches has numerous options that you can mix and match to format the field in just about any way you want. I explain the various uses of these three switches in the following sections.

### ***Preserving formatting when you update fields: The \\* Mergeformat switch***

When you update a field, Word usually removes any formatting, such as bold or italics, that you applied to a field result. If you want Word to keep this type of formatting, include the \\* Mergeformat switch in the field. Preserving formatting is usually a good idea, so I recommend that you use this switch most of the time.

You can tell Word to automatically add a \\* Mergeformat switch to a field by selecting the Preserve Formatting During Updates check box in the Field dialog box.

### ***Capitalizing field results***

Use the Format switch (\\*) options I list in Table 3-2 to control capitalization in a field result. The following field, for example, inserts the name of the current file in lowercase letters:

{ filename \\* lower \\* mergeformat }

<b>Table 3-2</b>	<b>Capitalizing Field Results</b>
<i>Switch</i>	<i>What It Means</i>
\* caps	The First Letter Of Each Word Is Capitalized.
\* firstcap	The first letter of the first word is capitalized.
\* lower	all letters are lowercase.
\* upper	ALL LETTERS ARE UPPERCASE.

### ***Setting the number format***

Numbers are usually displayed with Arabic numerals. You can change the format of numbers in field results, however, by using the switches listed in Table 3-3.

**Table 3-3                      Setting the Number Format**

<i>Switch</i>	<i>What It Means</i>
\* alphabetic	Converts numbers to lowercase letters. (1 becomes <i>a</i> , 2 becomes <i>b</i> , and so on.)
\* ALPHABETIC	Converts numbers to uppercase letters. (1 becomes <i>A</i> , 2 becomes <i>B</i> , and so on.)
\* Arabic	The usual number format (nothing special here).
\* CardText	Spells out the number. (For example, 1994 becomes <i>one thousand nine hundred ninety-four</i> .)
\* DollarText	Spells out a dollar amount the way you write it on a check. (289.95 becomes <i>two hundred eighty-nine and 95/100</i> .)
\* Hex	A favorite of computer nerds; converts numbers from the normal Earth dweller base 10 numbering system to base 16. (For example, 492 becomes <i>1EC</i> .)
\* Ordinal	Adds the letters <i>st</i> , <i>nd</i> , or <i>rd</i> (or whatever is appropriate) to the end of the number. (For example, 307 becomes <i>307th</i> .)
\* OrdText	Spells out the number and adds the letters <i>st</i> , <i>nd</i> , or <i>rd</i> (or whatever is appropriate) to the end. (For example, 307 becomes <i>three hundred seventh</i> .)
\* roman	Converts the number to lowercase roman numerals. Film directors use this format to mark copyright dates. (For example, 1953 becomes <i>mcmliii</i> .)
\* ROMAN	Converts the number to uppercase Roman numerals. (For example, 1953 becomes <i>MCMLIII</i> .)

Consider this text, for example:

This is the { page \\* OrdText \\* mergeformat } page.

This line produces a result like this:

This is the thirty-third page.

In this case, the \\* OrdText switch spells out the page number.



The capitalization used in the table doesn't matter except for the Alphabetic and Roman formats. In that case, capitalization determines whether upper- or lowercase letters are displayed for the field value.



## Creating custom number formats

If you don't like the way Word displays numbers, you can create your own, custom number formats by using the Numeric Picture switch (\#). Numeric pictures are created by stringing together a bunch of pound signs, zeros, commas, decimal points, plus or minus signs, dollar signs, and other characters to show how you want numbers to appear. Table 3-4 lists the numeric picture switches you're most likely to use.

<b>Table 3-4</b>	<b>Sample Numeric Picture Switches</b>
<i>Picture Switch</i>	<i>Type of Number It Prints</i>
\# #,##0	Whole numbers with commas to separate groups of thousands (for example, 1,024 and 1,244,212).
\# #,##0.00	Numbers with commas to separate groups of thousands and two decimal positions. Both decimal positions print even if one or both of them is zero (for example, 1,024.00 and 8.47).
\# \$,##0.00;(\$,##0.00)	Numbers as money: commas to separate groups of thousands, two decimal positions, and a leading dollar sign; for example, \$1,024.00. Negative numbers are enclosed in parentheses; for example, (\$97.38).
\# 0	Whole numbers without commas (for example, 38 and 124873345).
\# 0%	Whole numbers without commas, followed by a percent sign (for example, 98%).
\# 0.00	Numbers without commas but with two decimal positions (for example, 1024.00 or 3.14).
\# 0.00%	Numbers without commas, with two decimal positions, and followed by a percent sign (for example, 97.99%).

## Creating custom date and time formats

When you insert a date field, you can click the Options button and choose from one of 17 different formats. If you don't like any of the 17 formats, you can compose your own, custom date format by using the Date-Time Picture switch (\@). You just string together the various components of the date or time by using combinations of characters, such as MMM to stand for the three-letter month abbreviation, and dddd to stand for the day of the week, spelled out.



You'd think with 17 date formats to choose from, you could always find the one you need. That's not always the case, though. For example, if you want just the year (as in 2006), you have to create a custom date format using the switch \@ "yyyy". Word doesn't provide this seemingly basic date format among its 17 formats.

## *Updating a Field*

When you first insert a field, Word calculates the field's result. Thereafter, the field result might become out of date. To recalculate a field result to ensure that it's up-to-date, follow one of these procedures:

- ◆ Click the File tab and then click Options and select the Display tab. Then select the Update Fields Before Printing check box and click OK. Word automatically updates all fields every time you print the document.
- ◆ To update a specific field, select the field and press F9. If you select several fields, pressing F9 updates all of them. You can quickly update all fields in a document by pressing Ctrl+A to select the entire document and then pressing F9 to update the fields.
- ◆ If you point to a field with the cursor and right-click, a shortcut menu appears. Choose the Update Field command from this menu to update the field.

## *Preventing a Field from Being Updated*

If you do *not* want to update a field, you can either lock the field or unlink the field. If you lock the field, Word prevents it from updating until you *unlock* the field. If you *unlink* the field, Word deletes the field code and replaces it with the result text. Locking a field temporarily prevents it from being updated; unlinking the field is permanent.

To lock, unlock, or unlink a field, first select it. Then use the keyboard shortcuts I list in Table 3-5.

**Table 3-5**      **Keyboard Shortcuts for Locking, Unlocking, or Unlinking a Field**

<i>Keyboard Shortcut</i>	<i>What It Does</i>
Ctrl+F11	Locks the field
Ctrl+Shift+F11	Unlocks the field
Ctrl+Shift+F9	Unlinks the field (converts the field to results text)



## How I learned to love the Seq field

Seq is one of my favorite fields because it lets me create a type of numbered list that I use all the time and that can't be done easily using Word's numbering feature. When I plan the table of contents for a book, I have to create a list that looks something like this:

### Part I: Basic PowerPoint 2010 Stuff

Chapter 1: Opening Ceremonies

Chapter 2: Editing Slides

Chapter 3: Outlining Your Presentation

### Part II: Making Your Presentations Look Mahvelous

Chapter 4: Fabulous Text Formats

Chapter 5: Working with Pictures and Clip Art

### Chapter 6: A Slide of a Different Color

Do you see in this example how the chapters are numbered sequentially (1 through 6) and the parts also are numbered sequentially (I, II, and so on)? You can't easily create this type of list by using Word's built-in numbering feature. But you can do it if you use a Seq field. For the part numbers, use the Seq field like this:

```
{ seq part \* ROMAN \* mergeformat }
```

For chapter numbers, use the Seq field like this:

```
{ seq chapter \* mergeformat }
```

The words *part* and *chapter* in the fields let Word keep track of two separate lists at the same time.

## Field Code Reference

Table 3-6 lists all field codes available in Word 2010, along with a brief description of what each one does. For more detailed information about each field code, check the information available by using the Insert Field Code dialog box.

Table 3-6	Word Field Codes
Field Code	What It Does
= (Formula)	Lets you insert formulas into your documents.
AddressBlock	Inserts a mail-merge address block.
Advance	Moves the text that follows the Advance field to the right or left or up or down or to a specific position. In most cases, adjusting the positioning by using the Font or Paragraph dialog box works better.
Ask	Prompts for information from the user and stores the result in a bookmark. A separate dialog box appears and asks questions.

(continued)

**Table 3-6 (continued)**

<i>Field Code</i>	<i>What It Does</i>
Author	Obtains author name from the document properties or sets the Author property to a new value.
AutoNum	Automatically numbers the paragraph.
AutoNumLgl	Automatically numbers heading paragraphs using legal or technical format — for example, 1.1, 1.2, and so on (but has been rendered obsolete by Word's built-in numbered lists). Place an AutoNumLgl field at the beginning of each paragraph you want numbered.
AutoNumOut	Automatically numbers heading paragraphs using outline form (but has been rendered obsolete by Word's built-in lists). Place an AutoNumOut field at the beginning of each paragraph you want numbered.
AutoText	Inserts an AutoText entry.
AutoTextList	Creates a shortcut menu in the document that allows the user to select AutoText entries.
BarCode	Inserts a postal bar code based on an address.
Bibliography	Inserts a bibliography entry.
BidiOutline	Reverses the direction of outline numbering in documents that mix languages reading from left to right, such as English, and from right to left, such as Hebrew or Arabic.
Citation	Inserts a citation.
Comments	Shows the contents of the comments field from the document's properties and allows you to change the comments.
Compare	Compares two expressions and returns a value of 1 if the comparison is true and 0 if false. It's similar to the If field code.
CreateDate	Inserts the document's creation date.
Database	Inserts the result of a database query into the document as a table.
Date	Inserts the current date into the document. (Word gets the date from Windows. To reset the date if it looks wrong, double-click the date that appears on the right side of the Windows taskbar.)
DocProperty	Retrieves a specified document property. Many of these document properties are also available via their own field codes, such as Author and EditTime. Some are also available via the Info field.
DocVariable	Inserts the value of a document variable into your text.

<i>Field Code</i>	<i>What It Does</i>
EditTime	Inserts the total editing time in minutes since the document was created. Don't be fooled into thinking that this number somehow reflects a meaningful measure of how long you spent working on the document, because the clock continues to run while a document is open whether or not you're working on it. (If you're paid based on this field, I recommend leaving your documents open overnight.)
Eq	Creates rudimentary mathematical equations and is left over from the days before Word had built-in equations.
FileName	Inserts the filename of the current document, with or without the complete path.
FileSize	Inserts the size of the document file in bytes, kilobytes, or megabytes.
Fill-in	Prompts the user for text and then inserts the text into the document as the field result. It is similar to the Ask field, except that Ask places the user's input in a bookmark rather than in the document.
GoToButton	Creates a button that moves the insertion point to a specified location when clicked.
GreetingLine	Inserts the greeting line for a mail merge.
Hyperlink	Inserts a hyperlink.
If	Compares the results of two expressions and supplies one of two result values depending on the outcome of the comparison.
IncludePicture	Inserts a picture into the document. Inserting a picture is much easier using the Insert tab (click Picture in the Illustrations group on the Insert tab), so this field is obsolete.
IncludeText	Inserts another document into the current document.
Index	Inserts an index. You must first mark entries to be included in the index with XE fields. Note that creating an index is much easier when you use the References tab.
Info	Retrieves specified document information. Many of these document properties are also available via their own field codes, such as Author or EditTime. Most are also available via the DocProperty field. The Info field also lets you set a new value for several of the properties.
Keywords	Displays keywords from the document properties.
LastSavedBy	Displays the name of the user who last saved the document.
Link	Inserts into the document a file or portion of a file created by another application.

(continued)

**Table 3-6 (continued)**

<i>Field Code</i>	<i>What It Does</i>
ListNum	Inserts an element in a list.
MacroButton	Inserts a button that, when clicked, runs a macro.
MergeField	Sets up a merge field that's replaced by data from the data source when the mail merge is processed.
MergeRec	Sets up a merge field that displays the number of the data record being processed during a mail merge.
MergeSeq	Displays a count of the number of records that have been merged at that point during a mail merge.
Next	Skips to the next record in the data source without starting a new merge document. Use this field if you want each merge document to include data from two or more records.
NextIf	Skips to the next merge record if the specified condition is true. The Mail Merge Wizard (on the Mailings tab) handles conditional merging better.
NoteRef	Allows you to refer to a footnote or endnote that's already marked so that if the footnote or endnote changes, the reference changes along with it.
NumChars	Inserts the number of characters in the document.
NumPages	Inserts the number of pages in the document.
NumWords	Inserts the number of words in the document.
Page	Inserts the current page number. This field is inserted into the header or footer when you click the Page Number button.
PageRef	Inserts the number of the page on which a specified bookmark appears.
Print	Sends printer codes directly to the printer when the document prints. This field is left over from the days when printers were more primitive and you sometimes had to coerce the printer to work by sending special printer codes.
PrintDate	Displays the date on which the document was last printed.
Private	Holds information that's stored when a document converts from one format to another. This field is intended for use only by document converters.
Quote	Inserts text into a document.

<i>Field Code</i>	<i>What It Does</i>
RD	Lets you create a table of contents or an index for a multifile project without dealing with Word's master document feature. Unfortunately, this method doesn't automatically number pages consecutively from one document to the next. Instead, you must manually set the page numbers and update any TOC, TOA, or Index fields in the separate documents.
Ref	Inserts the contents of the specified bookmark. This field is the only one for which the field code itself is optional. As a result, you can cite only the name of the bookmark.
RevNum	Inserts the number of times the document is saved. Thus, if you save a document ten times in the course of an hour (not an unreasonable rate), you produce ten revisions. Unfortunately, this result probably isn't what you or I think of as a true revision number, because most users frequently save their work.
SaveDate	Inserts the date on which the document was last saved.
Section	Inserts the current section number.
SectionPages	Inserts the total number of pages in the current section.
Seq	Creates sequence numbers, such as a numbered list or chapter or heading numbers. For simple lists, use the Numbering button in the Paragraph group on the Home tab.
Set	Lets you create a bookmark for text that isn't visible in the document.
Skiplf	Conditionally skips the next merge record during a mail merge, based on the results of a comparison. The Mailings tab on the Ribbon has better tools for handling conditional merging, so avoid using this field.
StyleRef	Inserts text formatted in a particular style. This field is most useful for creating dictionary-style headers or footers that cite the first or last heading on the page.
Subject	Inserts the document subject, taken from the document's properties.
Symbol	Inserts a symbol into the document. The result is far easier to accomplish by using the Symbol button in the Symbols group on the Insert tab.
TA	Marks a citation to be included in a table of authorities. This field is inserted when you press Alt+Shift+I to mark a citation.
TC	Marks an entry to be included in a table of contents. You can more easily compile tables of contents based on heading styles, but if you must do it the hard way, use TC fields instead.

(continued)

**Table 3-6 (continued)**

<i>Field Code</i>	<i>What It Does</i>
Template	Inserts the filename of the template attached to the document.
Time	Inserts the current time.
Title	Inserts the document title taken from the document's properties.
TOA	Compiles a table of authorities based on TA fields inserted into the document. This field is inserted when you use the References tab on the Ribbon to insert a Table of Authorities.
TOC	Compiles a table of contents. This field is inserted when you use the References tab to insert a table of contents.
UserAddress	Inserts the user's address taken from the Advanced tab of the Word Options dialog box. (Choose File↔Options to open the Word Options dialog box.)
UserInitials	Inserts the user's initials.
UserName	Inserts the user's name.
XE	Marks an entry for inclusion in an index. XE fields insert when you press Alt+Shift+X.



# Chapter 4: Creating Custom Forms

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## *In This Chapter*

- ✓ Getting to know forms
- ✓ Making a form template
- ✓ Inserting a text field
- ✓ Inserting a check box field
- ✓ Adding a drop-down field
- ✓ Entering data into a form
- ✓ Adding help to a field

**M**y guess is that Microsoft had a lucrative contract with the government — probably the military — to sell a million copies of Word to the government if the program provided a feature for creating and filling in forms, preferably in triplicate. So here I am, ready to write another chapter for this book. I'd really rather call it a day and maybe catch a quick round of golf, but — who knows? — maybe the government will buy a truckload of copies of this book at \$913 apiece if I throw in a chapter about creating and filling in forms.

You might not realize it, but creating a form that you or someone else can fill out later qualifies as a type of programming. Therefore, you must adopt a bit of a programmer's mentality, distasteful as that might seem. In this chapter, the word *user* refers to the person — you or someone else — who fills out a form that you create, just to keep you alert.

Also, be aware that Word 2010 introduces a new type of form that's designed to work with data stored in files in XML format. These types of forms are usually created by application developers who are intimately familiar with XML. The forms that I show you how to create in this book are simply documents that restrict the user's input to specific parts of the document and have nothing to do with XML.

## *Understanding Forms*

A *form* is a special type of document in which parts of the document are protected from user modification. A user can enter information only in pre-defined, fill-in-the-blank portions of the document, which are *form fields*.

Figure 4-1 shows an example of a form I created in Word. Most of the text you see in the document is protected. The only parts of the document that the user can modify are the shaded parts: the name and address fields, the answers to the two questions, and the check boxes.

**Figure 4-1:**  
A Word  
form.

**Word 2010 Class Action Survey**

Name:                     

Address: 1011 Spanning Tree Lane  
Suite 101

City/State/Zip: Twoville NY 10011

How often do you use Word 2010? Every Day

How would you rate Word 2010 ease of use? Seen worse

Have you suffered any of the following symptoms of Word Affliction Disorder Syndrome?

<input checked="" type="checkbox"/> Headache	<input type="checkbox"/> Sleeplessness	<input type="checkbox"/> Memory loss
<input checked="" type="checkbox"/> Nervousness	<input checked="" type="checkbox"/> Inability to concentrate	<input type="checkbox"/> Chronic back pain
<input type="checkbox"/> Nausea	<input checked="" type="checkbox"/> Sexual dysfunction	<input type="checkbox"/> Loss of appetite
<input type="checkbox"/> Cramps	<input checked="" type="checkbox"/> High blood pressure	<input checked="" type="checkbox"/> Hair loss
<input checked="" type="checkbox"/> Depression	<input checked="" type="checkbox"/> Ringing in ears	<input type="checkbox"/> Loss of car keys
<input checked="" type="checkbox"/> Fatigue	<input type="checkbox"/> Listlessness	<input checked="" type="checkbox"/> General grumpiness

I provide the exact steps for creating and filling out a blank form later in this chapter, but the general idea goes something like this: First you create a new template. Then you add to the template any text that you want to appear in the form, and you add the form fields using buttons available in the Controls section of the Developer tab. When you finish the blank form, use the Restrict Editing command (on the Developer tab) to prevent the user from modifying any part of the document other than the form fields and, finally, save the template.

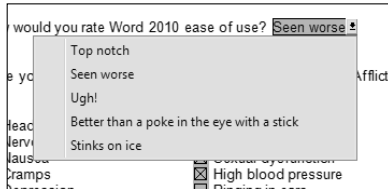
To fill in a form, you have to create a new document based on the form template. Then fill in the blanks. Word doesn't allow you to move the insertion point anywhere outside the form fields, so you don't have to worry about accidentally messing up the form.



- ◆ Think of the template as a pile of blank forms. To fill out a form, first you have to grab a form from the pile by opening the template. After you fill out the form (the template), you can save it as a normal document. The saved document contains the form itself that's copied from the template, plus whatever information you typed into the form fields.

- ◆ Although it's not apparent in Figure 4-1, the form fields for the first two questions are drop-down list boxes. Rather than type a response to the question, the user selects one of several permissible responses. If, for example, the user clicks in the form field for the first question ("How would you rate Word 2010's ease of use?"), the drop-down list shown in Figure 4-2 appears.

**Figure 4-2:**  
A drop-down list.



- ◆ Microsoft offers several form templates for download at the Microsoft Office Online Web site (<http://office.microsoft.com>). To see what you can do with forms, try downloading a few of these templates.

## Creating a Form Template

Before you can fill out a form, you must create a template. The template contains any text and graphics that appear on the blank form as well as the form fields, in which the user enters information.

To create a form template, follow these steps:

- 1. Choose File⇨New to display the New page in Backstage view, and then select Blank Document and click Create.**  
This action creates a new, blank document.
- 2. Choose File⇨Save As.**  
The Save As dialog box appears.
- 3. Select Word Template from the Save As Type drop-down list.**
- 4. If you want the template to be available from the File⇨New command, navigate to your Templates folder.**

To discover the folder location, choose File⇨Options, click the Advanced tab, scroll all the way to the bottom, and click File Locations. Then select User Templates and click the Modify button.

- 5. Type a name for your new form template and click Save.**

The initial copy of the template is saved.

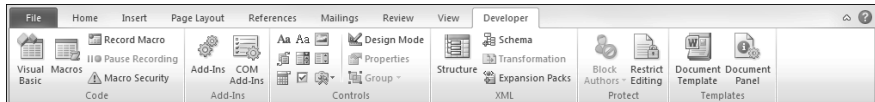
## 6. Choose File⇨Options.

This step opens the Word Options dialog box.

## 7. On the Customize Ribbon tab, select the Developer tab in the list box on the right. Then click OK.

The Developer tab appears. It contains the commands you need in order to create a form, as shown in Figure 4-3.

**Figure 4-3:**  
The  
Developer  
tab.

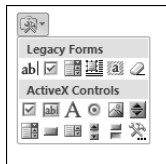


## 8. Create your form.

Type text where you want text to appear, insert graphics where you want graphics to appear, and insert form fields where you want form fields to appear. (Much of the rest of this chapter is devoted to this task.)

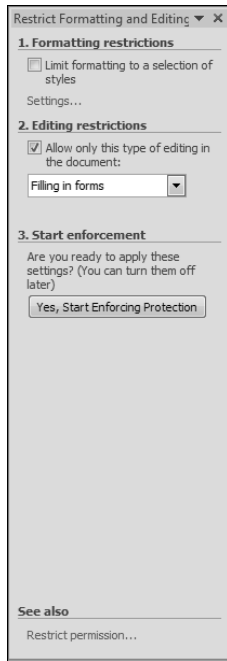
To insert form fields, click the Legacy Tools button in the Controls group on the Developer tab. This action reveals the menu of controls shown in Figure 4-4. The form controls are in the top row of this menu, labeled Legacy Forms. For more specific information on creating these fields, see the following three sections.

**Figure 4-4:**  
Legacy  
Forms  
menu.



## 9. Click the Restrict Editing button, found in the Protect group of the Developer tab on the Ribbon.

The Restrict Formatting and Editing task pane appears, as shown in Figure 4-5.



**Figure 4-5:**  
The Restrict  
Formatting  
and Editing  
task pane.

- 10. Select the Allow Only This Type of Editing in the Document check box and then select Filling In Forms from the drop-down list.**

This action protects the document so that the user can enter data only in the form fields.

- 11. Click the Yes, Start Enforcing Protection button in the Restrict Formatting and Editing task pane.**

The dialog box shown in Figure 4-6 appears.

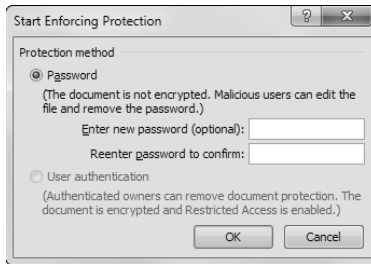
- 12. Type the password you want to use to protect the document in both text boxes and then click OK.**

Using a password helps ensure that only you can unprotect the form to make changes to the form's layout. If you don't care about password-protecting the form, just click OK without typing a password.

- 13. Choose File→Save to save the template.**

That's all. You're done.

**Figure 4-6:**  
The Start  
Enforcing  
Protection  
dialog box.



Here are some suggestions for creating forms:

- ◆ If you're converting a paper form to Word, create the Word form so that it looks as much like the current paper form as possible. Work in Print Layout view so that you can see how the form elements line up.
- ◆ If you want the form to be laid out on a grid with ruled lines and boxes, use tables, text boxes, borders, shading, and whatever other Word features you can muster.
- ◆ If you're creating a template for the first time, you may want to refer to Book I, Chapter 3 to make sure you know the ins and outs of working with templates.
- ◆ Creating a form is tedious work. You might not want to wait until the end of the process to save the template. In fact, you should press Ctrl+S to save your work every few minutes.
- ◆ If you protect the template by using the Restrict Editing command, you must unprotect the template if you need to change the layout of the form later. Click Restrict Editing (in the Protect group on the Developer tab) to open the Restrict Formatting and Editing task pane. Then click the Stop Protection button at the bottom of the task pane. If you used a password when you protected the document, you're asked to enter the password to unprotect the document. Don't forget to protect the form again when you finish!



## *Creating a Text Field*

A *text field* is a form field in which a user can type information. You use text fields to provide a space on the form where the user can enter information, such as a name or an address. The form shown in Figure 4-1 uses four text fields: one for the name and three for the address lines.

To create a text field in a form, follow these steps:

1. **Position the insertion point on the template where you want the text field to appear.**
2. **In the Controls group of the Developer tab, click Legacy Tools and then click the Text Form Field button.**

ab|

A text form field is inserted.



There's a similar control in the Controls group, but it doesn't do the same thing. Be sure to use the control in the Legacy Controls drop-down menu.

You should type some sort of text into the template next to the field to tell the user what to type in the field. For example, in Figure 4-1, I typed **Name:** next to the text field that's supposed to contain the name.

If you want to provide a *default value* for the text field — that is, a value that the field assumes if the user types nothing in the field — double-click the text field to summon the Text Form Field Options dialog box, as shown in Figure 4-7. Type a default value for the field in the Default Text box and then click OK.

**Figure 4-7:**  
The Text  
Form Field  
Options  
dialog box.

In the Text Form Field Options dialog box, you can also set the field type. Word lets you create six different types of text fields, as summarized in Table 4-1.

Table 4-1                      Text Field Types	
<i>Text Field Type</i>	<i>Description</i>
Regular Text	This field consists of ordinary text, such as a name or an address. The user can type anything in the field.
Number	The user must type a number in the field.
Date	The user must type a date in the field. The date must be in the month/day/year format (for example, 05/31/11 or 6-24-11) or may include the month spelled out (as in March 28, 2011).
Current Date	Word automatically inserts the current date into the field. The user can't type anything in the field.
Current Time	Word automatically inserts the current time into the field. The user can't type anything in the field.
Calculation	The field contains a formula field (=) to calculate a result value, usually based on the value of one or more number fields. The user cannot type anything in this field.

If you deselect the Fill-In Enabled check box in the Text Form Field Options dialog box (see Figure 4-7), Word displays the text field, but the user can't modify it. Use this field only if you plan to do some fancy macro programming, in which a macro enables or disables the field at will. This kind of macro programming requires programming knowledge that is way beyond the realm of reasonable.



After you create a text field, you can open the Text Form Field Options dialog box by double-clicking the field or right-clicking the field and choosing Properties from the shortcut menu that appears.

## *Creating a Check Box Field*

A *check box field* is a field that the user can select or deselect to provide a Yes or No answer. Check box fields work just like regular check boxes in dialog boxes: You click them to select or deselect them.

Follow these steps to create or insert a check box field:

1. **Position the insertion point in the template where you want the check box field to appear.**



2. **In the Controls group of the Developer tab, click Legacy Tools and then click the Check Box Form Field button.**

A check box form field is inserted.



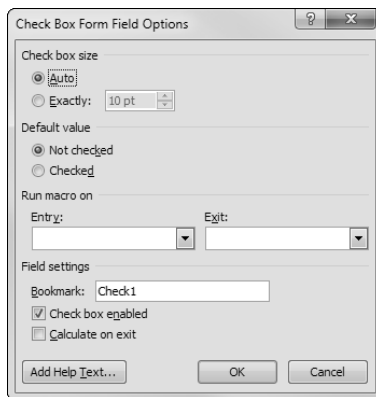


There's a similar control in the Controls group, but it doesn't do the same thing. Be sure to use the control in the Legacy Controls drop-down menu.

- 3. If you want the check box to not be selected when the form is first displayed, you're done. Otherwise, double-click the Check Box form field.**

The Check Box Form Field Options dialog box opens, as shown in Figure 4-8.

**Figure 4-8:**  
The Check  
Box Form  
Field  
Options  
dialog box.



- 4. Select the Checked option.**

The check box is selected when the form is first displayed.

- 5. Click OK.**

The check box is now inserted in the document.

Here are some pointers for creating a check box field:



- ◆ Obviously, a check box by itself is of little worth. You want to place some text in the template right next to the check box so that the user knows what the check box field means.
- ◆ Unless you're into writing macros, the only thing you can do with a check box is select it or deselect it. If you want to roll up your sleeves and do some heavy-duty macro programming, you can come up with all sorts of exotic uses for check box fields.
- ◆ If you want to change the default size of the check box field, select Exactly (at the top of the Check Box Form Field Options dialog box) and type the size of the check box in points.

- ◆ If you deselect the Check Box Enabled check box, Word displays the check box field, but the user can't modify it. Use this field only if you plan to do some fancy macro programming, in which a macro enables the field if the user enters a certain value into another field. To reenable the check box, select the Check Box Enabled check box.

Sounds like a scene from the movie *Airplane*, doesn't it?

Roger: Chuck, check the Check Box Enabled Check Box.

Chuck: Roger, Roger. Now checking the Check Box Enabled check box. Chuck out.

Roger: Check, Chuck.



- ◆ You can open the Check Box Form Field Options dialog box after you insert a check box field by double-clicking the field or by right-clicking the field (that is, pointing to it and clicking the right mouse button) and selecting Properties from the shortcut menu that appears.

### *Creating a Drop-Down Field*

A *drop-down field* is similar to a text field, except that the user isn't allowed to type text directly in the field. Instead, the user must select from a list of preset choices given in a list box. List boxes are helpful for fields such as marital status, shipping instructions, or gender (in other words, fields that have only a limited set of correct answers).

Follow these steps to create, or insert, a drop-down field:

- 1. Position the insertion point in the template where you want the drop-down list field to appear.**



- 2. In the Controls group of the Developer tab, click Legacy Tools and then click the Drop-Down Form Field button.**

A drop-down form field is inserted.

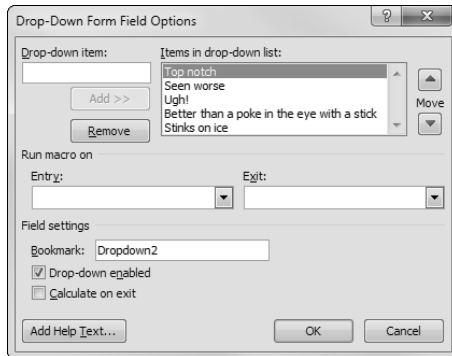
There's a similar control in the Controls group, but it doesn't do the same thing. Be sure to use the control in the Legacy Controls drop-down menu.



- 3. Double-click the drop-down form field.**

The Drop-Down Form Field Options dialog box appears, as shown in Figure 4-9.

**Figure 4-9:**  
The Drop-Down  
Form Field  
Options  
dialog box.



4. To add an item to the drop-down list, type some text in the Drop-Down Item box and then click the Add button.

The text is added to the Items in Drop-Down List field.

5. Repeat Step 4 for each item you want to include as a choice in the drop-down list.

6. When you add all the items you want in the list, click OK.

That's it!

If you're going to the trouble of creating drop-down list fields, keep the following hot tips in mind:

- ◆ The first item in the drop-down list is the default selection — that is, the item initially selected for the field.
- ◆ To rearrange items in the drop-down list, open the Drop-Down Form Field Options dialog box, select the item that you want to move to another position in the list, and click the up or down Move buttons.
- ◆ To delete an item from the list, select the item and click the Remove button.
- ◆ To correct a mistake in a list item, delete the incorrect item. Word copies the deleted item to the Drop-Down Item box, where you can correct the mistake and click the Add button to reinsert the item.
- ◆ If you deselect the Drop-Down Enabled check box, Word displays the drop-down list field but the user can't modify it. Use this field only if you plan to do some fancy macro programming, in which a macro enables or disables the field on the fly. (Try to con a computer nerd friend into working this macro for you.)
- ◆ You can open the Drop-Down Form Field Options dialog box after you insert a drop-down field by double-clicking the field or right-clicking the field and selecting the Properties from the shortcut menu that appears.



## *Filling Out a Form*

After you create a form template and protect it, it's time to put the form to good use in collecting the vital information that you so carefully designed it to record. In other words, it's time to fill out the form.

To fill out a form by using a form template that you or someone else created, follow these steps:

**1. Choose File⇨New.**

The New page of Backstage view appears.

**2. Click My Templates and then select the correct form template from the list of templates.**

**3. Click OK.**

**4. Fill in the form fields.**

When you fill in the form fields, you can use any of the keyboard actions listed in Table 4-2. For the most part, you press the Tab key to move from field to field.

The spell checker doesn't work in form fields, so you have to be careful about your spelling when you work with a form.



**5. Print the document.**

Choose File⇨Print and then click the Print button.

**6. Save the file, if you want.**

Choose File⇨Save.

**Table 4-2**      **Keys You Can Use When Filling Out a Form**

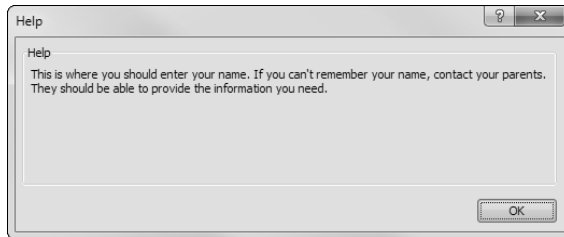
<i>Key</i>	<i>What It Does</i>
Enter, Tab, or ↓	Moves the insertion point to the next field
Shift+Tab, or ↑	Moves the insertion point to the previous field
Alt+↓ or F4	Displays a drop-down list
↑ or ↓	Moves up or down in a drop-down list
Spacebar or X	Selects or deselects a check box field
F1	Displays Help text for a field
Ctrl+Tab	Inserts a tab character into a text field

## Adding Help to a Form Field

Word lets you add your own Help text to form fields. Then if you forget what a field is for when you're filling out a form, the Help text reminds you.

You can create two types of Help text for each field. Status bar help information appears on a single line of text on the status bar whenever the insertion point moves into the field. Word limits this Help text to 138 characters so that it fits in the space provided on the status bar. If the status bar help isn't enough, you can supply as many as 256 characters of Help text, which the user can summon by pressing F1. Figure 4-10 shows an example of Help text.

**Figure 4-10:**  
Help text for  
a form field.



To create Help text for a field, follow these steps:

- 1. Select the field to which you want to add Help text.**

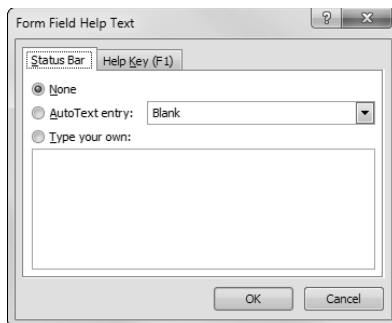
Make sure that the form is unprotected. You can't add Help text to a field while the form is protected.

- 2. Double-click the field to open the Form Field Options dialog box.**

- 3. Click the Add Help Text button.**

The Form Field Help Text dialog box appears, as shown in Figure 4-11.

**Figure 4-11:**  
Adding help  
to a form  
field.



4. **Type the status bar Help text on the Status Bar tab and the Help text on the Help Key (F1) tab.**
5. **Click OK.**

The Help text is now attached to the field. The user can display it by pressing F1.

## ***Using Preprinted Forms***

If you're creating an online form for a document for which you have preprinted forms to use with your printer, format the form template so that its fields align exactly with the form fields on the preprinted form. Then when you want to print to the preprinted form, choose **File→Options**. In the Word Options dialog box, click the Advanced tab, scroll down to the When Printing This Document options, and then select the **Print Only the Data from a Form** option. Word prints just the data you enter into the form fields, not the form template itself. If your preprinted forms and your form template are lined up properly, the data fits snugly in the fields on the preprinted form.

## Book IX

# Features for Developers

### The 5<sup>th</sup> Wave

By Rich Tennant



"All I know is I can't get the reflection tool to work in my Word document."

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# Chapter 1: Recording and Using Macros

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## *In This Chapter*

- ✓ Recording a macro
- ✓ Running a macro
- ✓ Editing a macro
- ✓ Using auto macros

A *macro* is a sequence of commands or keystrokes that Word records and lets you play back at any time. Macros allow you to create your own customized shortcuts for tasks you do repeatedly. For example, Word comes with built-in keyboard shortcuts to make text bold (Ctrl+B) or italic (Ctrl+I), but no built-in shortcut exists to make text bold and italic all at the same time. To perform that formatting task, you have to press Ctrl+B and then press Ctrl+I. If you do that a million times a day, pretty soon that extra keystroke becomes bothersome. Wouldn't having a shortcut for bold-italic be nice? With Word's macro recorder, you can create one.

This chapter shows you how to record and play back simple macros. It doesn't show you how to create complex macros by using Word's macro programming language, Visual Basic for Applications. That's the topic of the remaining chapters in this minibook.

## *Where Do All the Macros Go?*

You can store macros in documents or in templates. When you create a macro, you have three choices for where to store the macro:

- ◆ **The current document:** The best place to create macros that you will use in only a single document.
- ◆ **The template that's attached to the current document if it's macro-enabled:** The best place to create macros that you want to use in a large number of similar documents. Then the macros are available to any document you create from the template.
- ◆ **The Normal.dotm template:** The place to create macros that you want to be available all the time, no matter which document you're working on.

**Note:** If the current document is based on `Normal.dotm`, you have only two choices — the current document or the `Normal.dotm` template.



When you create a macro, you need to think about when you'll want to run the macro. If you need to run it only from within a specific document, create the macro in that document. If you want the macro to be available only to documents based on a particular template, create the macro in that template. But if you want the macro to always be available no matter which document you're working on, store the macro in `Normal.dotm`.



You can also store macros in a *global template*, which is a useful place to create a library of macros that are available to all your documents. For more information about using global templates, turn to Book I, Chapter 3. **Note:** To create or edit macros in a global template, you must open the template. After you create macros in a template, you can close the template, attach it as a global template, and then run any macros it contains.

## *Doing the Macro Recorder Dance*

The easiest way to create a macro is to use the *macro recorder*, which is kind of like a videocassette recorder. After you turn on the macro recorder, it follows you around and makes a precise record of everything you do until you turn off the recorder. Well, not *everything* — the Word macro recorder records only the stuff you do in Word. It doesn't notice when you dribble coffee down your chin or sneeze on the monitor. But when you turn on the recorder, anything you do in Word — whether you're typing text, applying formatting, calling up a command, or filling out a dialog box — is carefully recorded.

Then when you turn off the recorder, you can replay the recorded macro to repeat the exact sequence of steps that Word recorded in the macro.



About the only things that are *not* recorded by the macro recorder are mouse movements within the document. The macro recorder records buttons or Ribbon choices you click, but Word doesn't let you navigate your document or select text with the mouse while the macro is recording. As a result, use the keyboard for navigating or selecting text while recording a macro.

To record a macro, follow these steps:

### **1. Try to talk yourself out of it.**

Fiddling around with macros can be a bit of a time-waster. Ask yourself whether you truly will use the macro after you go to the trouble of recording it. If not, go directly to Step 12.

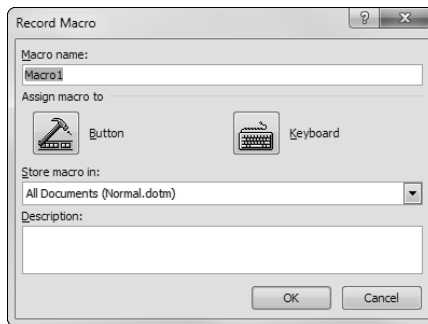
**2. Think about what you're going to do.**

Think through all the steps you have to follow to accomplish whatever task you want to automate with a macro. To create a macro that makes text bold and italic, for example, all you have to do is press Ctrl+B and then press Ctrl+I. That's a simple macro, but other macros can be much more complex, involving dozens of steps. If necessary, rehearse the steps before you record them as a macro.

**3. Click the Developer tab on the Ribbon and then click the Record Macro button in the Code group.**

The Record Macro dialog box appears, as shown in Figure 1-1.

**Figure 1-1:**  
The Record  
Macro  
dialog box.



If the Developer tab isn't visible, choose File⇨Options to summon the Word Options dialog box. Then click the Customize Ribbon tab and select the Developer check box in the Main Tabs list.

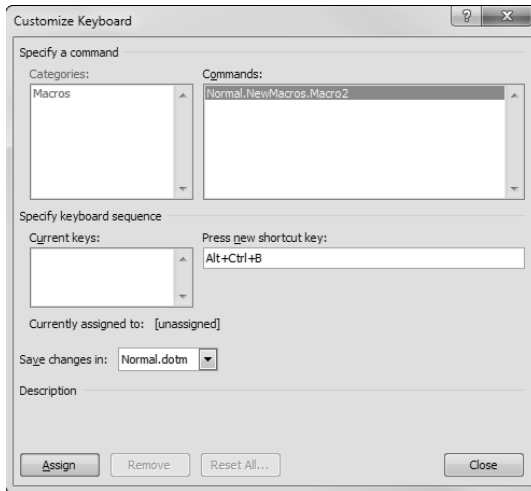
**4. Type the name of the macro you want to create in the Macro Name text box.**

The name can be anything you want, but it cannot include spaces, commas, or periods. When the Record Macro dialog box first appears, the macro name is set to something like Macro1 or Macro2 (or Macro783 if you've been busy). Surely, you can come up with a better name. (I know: "Yes, I can, and stop calling me Shirley.")

**5. To make your macro accessible from a toolbar or the keyboard, click the Button or Keyboard button.**

If you click the Keyboard button, the dialog box shown in Figure 1-2 appears. Type the shortcut key combination you want to assign to the macro (in this case, I pressed Alt+Ctrl+B), click the Assign button, and then click Close.

**Figure 1-2:**  
Assigning  
a macro to  
a keyboard  
shortcut.



If you click the Button button instead, the Word Options dialog box appears with the Quick Access Toolbar tab selected. Then you can create a button on the Quick Access toolbar to run the macro. For more information, refer to Book VIII, Chapter 1.

**6. Set the Store Macro In drop-down list to the location where you want to store the macro.**

The default setting stores the recorded macro in the `Normal.dotm` template so that it's always available. The other choices available in this drop-down list are storing the macro in the document that you were working on when you started the macro recorder or storing the macro to the template that the document is based on (if it is based on a template other than `Normal.dotm`).

**7. Type the keystrokes and click the Ribbon commands you want to record in the macro.**

**8. Type the keystrokes and Ribbon commands you want to record in the macro.**

To record the ***BoldItalic*** macro, for example, press `Ctrl+B` and then press `Ctrl+I`.

**9. If you have to stop recording temporarily, click the Pause button. Click it again to resume recording.**

You might forget how to do something, for example, especially if you skipped Step 2. If you click the Pause button, you can call up Word's Help command, look up and read the procedure for whatever task you forgot, dismiss Help, and click the Pause button again to resume recording.

**10. After you finish recording the macro, click the Stop Recording button.**

Word adds the macro to the template or document. You're almost done.

### 11. Test the macro.

If you assigned the macro to a keyboard shortcut, use the shortcut now to see whether the macro works. Otherwise, follow the steps in the later section “Running a Macro.”

### 12. You’re finished.

Congratulate yourself.



If the function of the macro isn’t obvious from the macro name, type a more elaborate description of the macro in the Description field of the Record Macro dialog box. You’ll thank yourself later when you forget what the macro does.

## Macro Recording Tips

Here are some tips to keep in mind as you record macros:

- ◆ You can open the Record Macro dialog box directly by clicking the Record Macro button on the status bar. It appears as a little red dot.
- ◆ If the macro doesn’t work, you might have made a mistake while recording it. If the macro is short enough, the best thing to do is to record the macro again. If the macro is long and you have nothing important to do, try editing the macro to expunge the problem. See the section “Editing a Macro,” later in this chapter.
- ◆ Macros are normally stored in the global `Normal.dotm` template. To store a macro in the template attached to the current document, change the setting of the Record Macro dialog box’s Store Macro In drop-down list.
- ◆ Don’t make any assumptions about where the insertion point will be when you run the macro. If necessary, begin the macro with a positioning command by moving the insertion point to the beginning of the document, the beginning of the line, or the beginning of a word. (Not all macros require a positioning command. But if your macro depends in any way on the position of the insertion point, this step is a must.)
- ◆ Don’t use the mouse to select text or navigate the document. Word doesn’t record these mouse actions. You can use the mouse to select Ribbon commands but not to move the insertion point.
- ◆ Use Ctrl+Home or Ctrl+End to move to the beginning or end of a document. Don’t use repeated Page Up or Page Down keys for this purpose. Pressing Page Up three times might move you to the top of your document when you record the macro, but when you run the macro, it might not. Similarly, use the Home and End keys, rather than the left or right arrow keys, to move to the start or end of a line.



## Avoiding unexpected side effects

Sometimes a macro has unexpected side effects. Suppose that rather than record the keystrokes Ctrl+B and Ctrl+I for the ***BoldItalic*** macro, you decide to record these steps:

1. Click the Font group button to display the Font dialog box.
2. Choose Bold Italic as the font style.
3. Click OK.

The macro seems to work, but sooner or later you discover that in addition to recording the Bold Italic font style, the macro recorded other character attributes — such as the font, size, and effects. If the text to which you applied the

Font dialog box command when you recorded the macro was 10-point Times New Roman font, every time you apply the macro, the font switches to 10-point Times New Roman.

You can avoid these side effects in two ways:

- ✓ Avoid recording dialog boxes in macros whenever a keyboard shortcut or a Ribbon button can do the trick. Whenever you record a dialog box in a macro, you record all the dialog box settings.
- ✓ Fix the macro later by editing it and removing the extraneous information. See the later section “Editing a Macro.”

- ◆ If you use the Find or Replace commands, be sure to move to the beginning of the document first.
- ◆ Avoid any commands that depend on the contents of a document that’s active when you record the macro. If your macro is based on information that will never be replicated, it’s a useless macro.

## Running a Macro

If you assigned a macro to the Quick Access toolbar or a keyboard shortcut, you can run the macro by clicking the Quick Access Toolbar button or pressing the keyboard shortcut. If you didn’t, you can run it by following these steps:

1. **Select the Developer tab on the Ribbon and then click the Macros button in the Code group.**

The Macros dialog box, shown in Figure 1-3, appears.

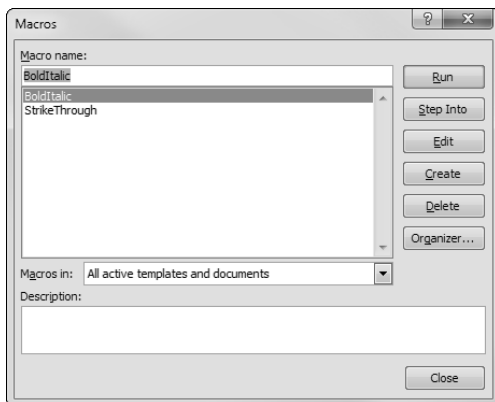
For a shortcut, you can press Alt+F8.

2. **If the macro you want to run isn’t already selected, select it now. If the macro you want doesn’t appear, try changing the Macros In setting.**

The macro might be in a different template.

3. **Click Run.**





**Figure 1-3:**  
The Macros  
dialog box.

## Editing a Macro

If you make a mistake while recording a macro, you can abandon the recording and start over. Or, you can finish the recording and edit the macro to correct the mistake. When you edit the macro, its commands appear in a separate window. You can delete or modify erroneous commands, you can insert new commands if you know how, or you can merely study the macro to try to figure out how it works.

When you edit a macro, you're exposed to Visual Basic for Applications (VBA). VBA isn't as deadly as the Ebola virus, but it can cause severe headaches and nausea if you're not inoculated with the Programmer Vaccine. For more information about VBA and its editor, turn to Chapter 2 of this minibook.

Here are the steps for editing a macro:

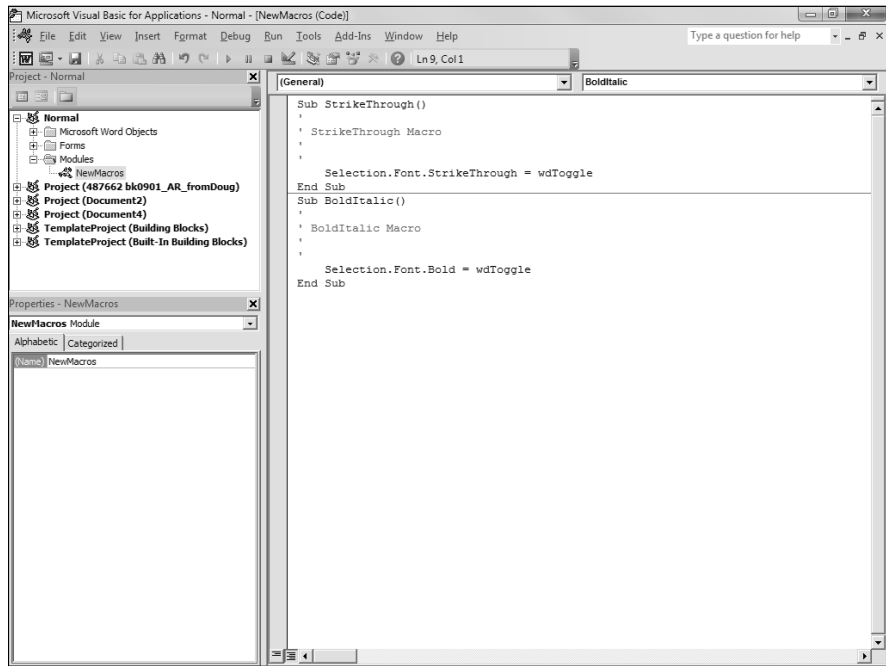
- 1. Click the Macros button on the Developer tab on the Ribbon or on the status bar.**

The Macros dialog box appears. (Refer to Figure 1-3.)

- 2. Select the macro you want to edit and click the Edit button.**

Word launches the Visual Basic editor, with the macro you selected visible in its own window. See Figure 1-4.

Notice that the Visual Basic editor uses good old-fashioned menus instead of the newfangled Ribbon. Notice also that you may see additional macros other than the one you just recorded. For example, besides the BoldItalic macro, Figure 1-4 also shows a macro named StrikeThrough that was previously recorded.



**Figure 1-4:**  
Editing a  
macro.

### 3. Make whatever changes are necessary to the macro.

Correct misspelled words, delete extraneous commands, and, if you're brave, add more commands.

### 4. Choose File→Save Normal to save your changes.

Note that if you are editing a macro in a template other than Normal, the name of the template will be listed in the Save command. For example, if the template is named MyTemplate, you will use the Save MyTemplate command to save your edits.

### 5. Choose File→Close and Return to Microsoft Word to close the macro window.

## *Simple Macro Edits That Don't Require a PhD in VBA*

Before you make massive changes to a macro, you need a good level of knowledge about VBA. However, you can make certain types of changes without knowing much about VBA. Here's a sampling:

- ♦ **Correct spelling errors.** If you inserted text into a document and misspelled it, don't hesitate to edit the macro to correct misspellings. Text



you insert into a document while recording a macro is included in a `Selection.TypeText` command, like this:

```
Selection.TypeText Text:="This is some simple text."
```

You can correct any spelling mistakes or change the inserted text altogether, as long as you take care not to remove either of the quotation marks that appear before and after the text. For example, you can correct the preceding line this way:

```
Selection.TypeText Text:="This is some sample text."
```

- ◆ **Remove extraneous commands.** If you inadvertently used a command while recording a macro, you can clean up your macro by removing the unnecessary command.
- ◆ **Remove unwanted dialog box settings.** If you record a dialog box in a macro, Word includes every setting in the dialog box. You can remove the settings that you don't want the macro to change. For example, if you use the Font dialog box to format text in small caps, Word inserts the following commands into the macro:

```
With Selection.Font
    .Name = "Times New Roman"
    .Size = 9.5
    .Bold = False
    .Italic = False
    .Underline = wdUnderlineNone
    .UnderlineColor = wdColorAutomatic
    .StrikeThrough = False
    .DoubleStrikeThrough = False
    .Outline = False
    .Emboss = False
    .Shadow = False
    .Hidden = False
    .SmallCaps = True
    .AllCaps = False
    .Color = wdColorAutomatic
    .Engrave = False
    .Superscript = False
    .Subscript = False
    .Spacing = 0.3
    .Scaling = 100
    .Position = 0
    .Kerning = 0
    .Animation = wdAnimationNone
End With
```

This command looks complicated at first, but if you study it, you see that it's little more than a list of all dialog box controls that appear in the Font dialog box. The periods look strange appearing in front of each command argument as they do, but they're required. You can safely

delete the lines that specify the dialog box controls you don't want to use so that the resulting command looks like this:

```
With Selection.Font
    .SmallCaps = True
End With
```



With a little more VBA knowledge, you can also remove the `With` and `End With` commands and substitute just the following line:

```
Selection.Font.SmallCaps = True
```

## *Using Auto Macros*

An *auto macro* runs automatically whenever a key event happens, such as when Word starts or a document closes. Word recognizes auto macros by name. For example, a macro named `AutoNew` automatically runs when you create a new document from a template, and a macro named `AutoClose` automatically runs when you close a document.

To create an auto macro, you simply create a macro by using one of these special macro names:

- ◆ **AutoExec:** Runs when Word starts. Store it in the `Normal.dotm` template.
- ◆ **AutoExit:** Runs when Word exits. Store it in the `Normal.dotm` template.
- ◆ **AutoNew:** Runs whenever a new document is created by using the template that contains the `AutoNew` macro.
- ◆ **AutoOpen:** Runs whenever an existing document opens. You can create an `AutoOpen` macro in the `Normal.dotm` template or in the template that's attached to the document or both.
- ◆ **AutoClose:** Runs whenever an open document closes. This macro can reside in `Normal.dotm` or in the template attached to the document.



You can prevent any auto macro from executing by holding down the `Shift` key while performing the action that otherwise triggers the macro. For example, holding down the `Shift` key while creating a new document prevents the `AutoNew` macro from running.

## *Protecting Your Computer from Macro Viruses*



Computer viruses can exploit Word's auto macro feature to infect your computer. As a result, you should take steps to protect yourself from the possibility of being hit by a macro virus. Here are some things you can do:

- ◆ Click the Macro Security button on the Developer Ribbon tab, and then set your macro security to Disable All Macros with Notification. You're then prompted before running macros.
- ◆ Avoid opening documents from people you don't know or trust, especially documents that arrive as attachments in unsolicited e-mail messages.
- ◆ Install an antivirus program. These programs sniff out and smash all known macro viruses, as well as other, more common types of viruses and worms.



# Chapter 2: Programming with VBA

---

## *In This Chapter*

- ✓ Using variables, strings, and other VBA elements
- ✓ Working with objects, properties, and methods
- ✓ Executing macros with `If`, `While`, and `Select Case`
- ✓ Displaying information and obtaining input from the user
- ✓ Working with user-defined subroutines and macros

I cover the basics of recording and playing macros in Chapter 1 of this minibook. Chapter 1 touches on the subject of VBA programming just enough to whet your appetite and give you the skills needed to create and use the various macros that appear throughout this book. But I reserve the real meat of VBA programming for this chapter. Here, I show you VBA in-depth so that, with a little practice and a lot of trial and error, you can create VBA macros of your own.



This chapter is admittedly a bit of a whirlwind introduction to VBA programming. If you have absolutely no programming experience, this chapter might be a bit overwhelming. Don't let the details of VBA bog you down. Study the sample macros that appear in this chapter and in the remaining chapters in this book, experiment a lot, and keep your chin up. You'll catch on soon enough. If you're not sure about how to create and edit macros, check out Chapter 1 of this minibook before proceeding.

## *Examining the Basic Structure of VBA Macros*

If you want to create a blank macro that you can then edit yourself, you can do so by summoning the Macros dialog box, typing a name for the macro you want to create, and clicking the Create button. Then Word switches you to the VBA editor and creates a skeleton of a macro for you, like this:

```
Sub BoldItalic()  
'  
' BoldItalic Macro  
'  
'  
  
End Sub
```

The lines that begin with apostrophes are comments. VBA ignores them completely, but you can use them to remind yourself what the macro does or how it works. Comments can appear on lines all by themselves, or they can appear at the end of a line, like this:

```
Sub BoldItalic() 'The BoldItalic macro
```

The `Sub` and the `End Sub` statements mark the beginning and end of the macro's main procedure. As you see later, a macro can call on other procedures or functions that you define elsewhere in your code. However, the simplest macros consist of these lines with some additional VBA statements between them.

For example, the following macro contains two VBA statements — one to make the selected text bold and the other to make it italic:

```
Sub BoldItalic()  
    Selection.Font.Bold = wdToggle  
    Selection.Font.Italic = wdToggle  
End Sub
```

The net effect of this command is to make the selected text both bold and italic.



Well, not quite. The effect of this macro is to change both the bold and italic attributes of the selected text. If the text isn't already bold or italic, the macro makes it bold and italic. But if the text is already formatted as bold but not italic, the macro turns off the bold attribute and turns on italic. And, if no text is selected, the macro sets the bold and italic attributes for text you subsequently type.

So here, just a page into this chapter, you already have an example of the Undeniable Truth of VBA programming: Even simple macros sometimes don't work the way you expect them to. The outcome of a macro often depends a great deal on whether text is selected, how the selected text (if any) is formatted, the view (Normal, Page Layout, or Outline), and many other factors. The moral of the story: *Test everything.*

## *Understanding the Basic Elements of VBA*

The following sections present a whirlwind tour of some basic elements of writing VBA macros.

### *Rules for writing VBA statements*

The normal way to write VBA statements is one per line. For example, here are two VBA statements, each on its own line:

```
Dim i As Integer
i = 100
```

If you want, you can “gang up” several statements on a single line by separating the statements with colons, as in this example:

```
Dim i As Integer : i = 100
```

However, your macros are easier to read if you stick to one statement per line.

You can indent lines to show the relationships among statements by using tabs or spaces. For example:

```
If Weekday(Now()) = 1 Then
    MsgBox "Time for football!"
End If
```

However, be aware that extra spaces aren’t required. The following lines have exactly the same meaning as the previous example:

```
If Weekday(Now()) = 1 Then
MsgBox "Time for football!"
End If
```

In addition, spacing *within* a VBA statement generally isn’t important. You can omit spaces when different elements of a statement are separated by a comma or colon or another punctuation symbol. However, the VBA editor often inserts spaces around those elements as you type them.

If you need to continue a statement onto two or more lines, end every line except the last one with an underscore character, like this:

```
MsgBox ("This is a really " _
    & "long message.")
```

The underscore character indicates to Word that the statement continues on the next line, so the successive lines are treated as a single statement.

## Comments

As mentioned earlier in this chapter, comments are marked with apostrophes. When you use an apostrophe anywhere on a line, VBA completely ignores everything on the line after the apostrophe. This treatment allows you to place comments directly on the lines where they relate:

```
Sub BoldItalic() ' This macro applies both bold and italic.
    Selection.Font.Bold = wdToggle 'Toggles Bold
    Selection.Font.Italic = wdToggle 'Toggles Italic
End Sub
```

### ***Projects, modules, procedures, and macros***

At its simplest level, a *macro* is a single VBA procedure that you can run from an application such as Word. However, VBA lets you gather procedures to form modules and projects to help you organize your macros. The following list describes each of these organizational units:

- ◆ **Procedure:** A named collection of VBA statements that's contained between Sub and End Sub statements.
- ◆ **Macro:** A specific type of procedure that you can invoke directly from a Word document. You can run a macro from the Macros dialog box or by associating it with a customized Quick Access Toolbar button or a keyboard shortcut.
- ◆ **Module:** A named collection of procedures. All Word documents include a module named New Macros. When you create a macro from the Macros dialog box, the new macro is created in this module. If you're working with a lot of macros, you can create additional modules to help keep them organized.
- ◆ **Project:** A collection of modules and other Word objects. Every document and template is a project.

## ***Working with Variables and Data***

A *variable* is a name assigned to a bit of computer memory that is used to hold a value. Variables are key features of any programming language, and VBA is no exception. Variables play an important role in all but the most trivial VBA macros.

### ***Using assignment statements***

You use an assignment statement to assign values to variables. For example:

```
Pi = 3.14159  
X = 0  
MessageText = "Hello from Planet Earth"
```

In a concession to the 40-year-old legacy of BASIC programming, in VBA you can preface assignment statements with the keyword `Let`:

```
Let Pi = 3.14159  
Let x = 0  
Let MessageText = "Hello from Planet Earth"
```

The `Let` keyword isn't required, however, and is considered quaint.



## Declaring variables

You declare a variable by using a `Dim` statement, like this:

```
Dim i As Integer
```

This statement declares a variable named `i`. The type of the variable is `Integer`.

Variable names, which must start with a letter, can be as long as 40 characters and can contain only letters and numerals and the underscore (`_`). Also, you cannot use any VBA reserved words (such as function names) or names of VBA statements, for example.

You use the `As` keyword to specify the data type for variables. VBA provides a number of data types you can use for variables:

- ◆ **Boolean:** True or False values.
- ◆ **Byte:** Integers from 0 to 255.
- ◆ **Integer:** Integers from -32,768 to +32,768.
- ◆ **Long:** Large integers. Values can be from approximately -2 billion to +2 billion.
- ◆ **Currency:** Decimal numbers with as many as 19 digits.
- ◆ **Single:** Single-precision, floating-point numbers, not used often in Word macros.
- ◆ **Double:** Double-precision, floating-point numbers, used even less often in Word macros.
- ◆ **Date:** A date or time value.
- ◆ **String:** A bit of text, such as “Humpty-Dumpty.”
- ◆ **Object:** Any object, such as a Word document or a window.
- ◆ **Variant:** A generic number or string.

If you omit the data type, `Variant` is assumed.

## Placing your declarations

The normal place to declare variables is within a procedure before you need to use the variable. Some programmers like to place all variable declarations at the start of the procedure, but that isn’t necessary. You can declare a variable at any time up to the first time you use the variable.

You can also declare variables at the module level. *Module-level* variables are available to all procedures in the module. Place any module-level variables before the first procedure in the module.

## *Using static variables*

A *static variable* is a variable whose value is preserved between executions of the procedure in which it's declared. You can find many excellent uses for static variables in Word macros. For example, you may use a static variable to temporarily keep track of text entered by the user, to remember the location in the document where an operation was performed, or to keep track of actions taken since the last time the macro was run.

To create a static variable, use the `Static` keyword rather than the `Dim` keyword, like this:

```
Static iCaseCount As Integer
```



You can use static variables only in procedures. You can't create a static variable at the module level.

## *Using Option Explicit*

Unlike in many other programming languages, such as Java or C#, you don't have to define variables before you can use them in VBA. The first time you use a variable in a VBA macro, the variable is automatically defined.



Most experienced programmers consider not having to define variables to be *the* major weakness in BASIC and all its dialects, including VBA and Visual Basic. The trouble is that you never know when you've misspelled a variable name, because if you misspell one, VBA assumes that you want to create a new variable. Suppose at the start of a macro you ask the user to enter a string value and you store the value entered by the user in a variable named `InputString`. Then later in the macro, you use the variable in a statement but misspell it `InputStrign`. Does VBA point out your error? No. It just assumes that you want to create a new variable named `InputStrign`. This `InputStrign` variable is given a default value of "" rather than the value entered by the user.

This type of problem is quite common in VBA programming. Whenever you're faced with a macro that looks like it should work but doesn't, carefully double-check all variable names for misspellings.



You can avoid the problem of misspelled variable names by adding the following line to the beginning of your VBA module:

```
Option Explicit
```

This line forces you to declare variables before you use them. Then if you use a variable that you haven't declared, you see an error message.

## Using Strings

A *string* is the most common data type for macros when working with Word documents. You need to know how to manipulate string data if you hope to accomplish anything meaningful in Word VBA.

For starters, you can create string *literals*, or strings that are simply quoted in your macro. To use a string literal, enclose a string value in quotation marks — full-fledged double quotes, not apostrophes. For example:

```
MessageText = "Hi there!"
```

In this example, "Hi there!" is a string literal whose value is assigned to the string variable named MessageText.

You can use an apostrophe within a string literal with no ill effects, as in the following example:

```
MessageText = "Hi y'all"
```

But you cannot include quotes within quotes. For example, the following line produces an error:

```
MessageText = "Say, "Cheeseburger!""
```

To include a quotation mark within a literal quoted with quotation marks, you must double the quotation marks, like this:

```
MessageText = "Say, ""Cheeseburger!"""
```

## Concatenation

You can use the *concatenation* technique to join two or more strings, end to end, to make a single, larger string. For example:

```
Entre = "Cheese" & "burger"
```

This line results in the string "Cheeseburger" being assigned to the Entre variable. The ampersand (&) is used for this purpose. The spaces around the ampersand are optional; if you leave them out, Word adds them when you run the macro.

Concatenation becomes quite useful when combined with string variables and, as you see in the following section, string functions. For example, consider this statement:

```
Message = "Could not deliver message to " & Recipient
```

In this line, a literal string value is concatenated with a variable string value. If the value of the `Recipient` variable is "Jimmy Hoffa", the `Message` variable is set to "Could not deliver message to Jimmy Hoffa".

The number of concatenations you can string together in a single statement has no limit.

## ***String functions***

VBA provides several built-in functions that work on strings. Table 2-1 summarizes these functions. Most of them come in handy from time to time.

Table 2-1	VBA Functions for Manipulating Strings
<i>Function</i>	<i>What It Does</i>
<code>Chr (value)</code>	<p>Generates the character that corresponds to the numeric (ANSI) code value. Common uses are:</p> <p><code>Chr (9)</code>: Tab</p> <p><code>Chr (11)</code>: New line</p> <p><code>Chr (13)</code>: Carriage return</p> <p><code>Chr (30)</code>: Nonbreaking hyphen</p> <p><code>Chr (32)</code>: Space</p> <p><code>Chr (160)</code>: Nonbreaking space</p>
<code>InStr ([n,] string1, string2)</code>	Returns the character position within <i>string1</i> at which <i>string2</i> begins, or 0 if <i>string2</i> is not found in <i>string1</i> . If <i>n</i> is used, the first <i>n</i> -1 characters of <i>string1</i> are ignored.
<code>LCase (string)</code>	Converts <i>string</i> to lowercase.
<code>Left (string, n)</code>	Returns the leftmost <i>n</i> characters of <i>string</i> .
<code>Len (string)</code>	Returns the length of <i>string</i> .
<code>LTrim (string)</code>	Removes leading spaces from <i>string</i> .
<code>Mid (string, x, y)</code>	Returns <i>y</i> characters from <i>string</i> starting at character <i>x</i> .
<code>Right (string, n)</code>	Returns the rightmost <i>n</i> characters of <i>string</i> .

Function	What It Does
<code>Right(string, n)</code>	Returns the rightmost <i>n</i> characters of <i>string</i> .
<code>RTrim(string)</code>	Removes trailing spaces from <i>string</i> .
<code>Str(n)</code>	Converts the number <i>n</i> to a string variable. For example, <code>Str(3.15)</code> becomes the string "3.15".
<code>UCase(string)</code>	Converts <i>string</i> to uppercase.
<code>Val(string)</code>	Returns the numeric value of <i>string</i> . For example, <code>Val("3.15")</code> becomes the numeric value 3.15.

One of the most commonly used string function is `Len`: It returns the number of characters in a string. For example:

```
Message = "Hello world!"  
LengthOfMessage = Len(Message)
```

In this example, the `LengthOfMessage` variable is assigned the value 12, the number of characters in the string `Message`. **Note:** The `Len` function returns a number, not a string. And the quotation marks that indicate the start and end of string literals aren't counted.

A final group of string functions you need are those used to clean up string values that may contain unnecessary leading or trailing spaces or unprintable characters. These functions include `LTrim()`, `RTrim()`, and `CleanString()`. For example, to remove spaces from the beginning and end of a string variable, use this statement:

```
TrimmedString = Trim(InputText)
```

## Of Objects, Properties, and Methods

VBA is inherently *object oriented*, which means that it deals extensively with programming elements known as objects. Simply put (as though that's possible), an *object* is a named entity that represents a component of a Word document. For example, a `Document` object represents an entire Word document, whereas a `Selection` object represents the text that's selected in a document.

Objects have three components:

- ◆ **Property:** Defines the data associated with an object. For example, the `Selection` object has a `Text` property that contains the text in the selection.

- ◆ **Method:** Defines actions that the object can perform. For example, the `Selection` object has a `Copy` method that copies the selection to the Clipboard.
- ◆ **Event:** Defines actions that an object can respond to. For example, when the user closes a document, the `Document` object raises a `Close` event. Then you can write a macro routine that is executed to add special processing for the `Close` event.

Although events can be important in certain types of macros, most macros work with just the properties and methods of various Word objects.

## *Using objects*

The basic trick for working with objects in VBA is that you use the period to separate the name of the object you want to work with from the name of the property or method you want to use. For example, `Selection.Text` refers to the `Text` property of the `Selection` object, and `Range.Copy` refers to the `Copy` method of the `Range` object.

One of the most important points about object-oriented programming is that the properties of an object can themselves be other objects that have properties and methods. For example, the `Selection` object has a `Font` property, which is itself a `Font` object. The `Font` object, in turn, has its own properties, such as `Name` and `Size`. So, you can refer to the `Name` property of the selection's font like this: `Selection.Font.Name`.

Another key to understanding objects is knowing that you can create variables to refer to them. You specify the type of a variable with the `As` keyword. For example, the following line declares a variable named `f` that represents a `Font` object:

```
Dim f As Font
```

Then you can assign an object to the variable.

You can't use the normal assignment statement to assign objects, however. Instead, you must use a `Set` statement, like this:

```
Set f As Selection.Font
```

In this line, the `Font` variable `f` is set to the object referred to by the `Font` property of the `Selection` object.

You can then refer to properties of the object variable in the usual way. For example, `f.Name` refers to the `Name` property of the `f` object.



## Getting to know the object model

Much of the trick to writing VBA macros for Word is knowing Word's *object model* — that is, the objects available in a Word macro and the properties and methods available for each type of object. You find out more about Word's object model in Chapter 3 of this minibook.

One way to get to know the object model is to let the VBA editor tell you about it. When you type a period after an object name, the VBA editor pops up a helpful list of the properties and methods available for that object. Then you can scroll down to the property or method you want to use and press Tab to insert it into your macro. This way is one of the best to discover which properties and methods are available for any given object.



Another way to find out which objects, properties, and methods are available — perhaps the best way — is to record a macro that comes close to accomplishing what you want to do and then switch to the VBA editor to see the code that was generated for the macro. Suppose that you want to write a macro that marks index entries. If you record a macro and then press Alt+Shift+X to mark an index entry, Word generates VBA code similar to this:

```
ActiveDocument.Indexes.MarkEntry Range:=Selection.Range, Entry:= _
    "Object model", EntryAutoText:="Object model", CrossReference:="",
    CrossReferenceAutoText:="", BookmarkName:="", Bold:=False, Italic:=False
```

In this example, you can tell that you use the `MarkEntry` method of `ActiveDocument.Indexes` to mark an index entry, and that this method takes several arguments: `Range`, `Entry`, `EntryAutoText`, `CrossReference`, `CrossReferenceAutoText`, `BookmarkName`, `Bold`, and `Italic`.

## Using methods

A *method* is an action that an object can perform. When you call a method, the object performs the action associated with the method. For example, the following statement copies the contents of the current selection to the Clipboard:

```
Selection.Copy
```

Some methods require *arguments*, which supply data for the method to work with. For example, the `Selection` object's `InsertAfter` method accepts a text string as an argument. The text string contains the text that's inserted after the selection.

To use arguments, simply list the argument values you want to pass to the method, like this:

```
Selection.InsertAfter "Some text"
```

In this line, `Selection` is an object, `InsertAfter` is a method, and `"Some text"` is an argument.

If a method requires two or more arguments, separate them with commas, like this:

```
Selection.StartOf wdParagraph, wdExtend
```

In this example, the arguments are *positional* because Word interprets the meaning of each argument based on the order in which you list them. In Word, you can also pass arguments by using argument names, as in this example:



```
Selection.StartOf Unit:=wdParagraph, Extend:=wdExtend
```

When you use methods that require arguments, the VBA editor displays tips that let you know which arguments the method expects.

In VBA, you can also enclose the arguments in parentheses, like this:

```
Selection.InsertAfter("Some text")
```

However, the parentheses aren't required. Note that it's okay to use both styles — with and without parentheses — within a macro.

### ***Using the With statement***

The `With` statement is a special VBA shortcut that lets you refer to an object in several statements without having to refer to the object every time. You simply list the object in the `With` statement. Then any statement that appears between the `With` and its corresponding `End With` statement and that begins with a period uses the object listed in the `With` statement.

Suppose that you want to set the **Bold** and **Italic** properties of the `Font` property of the `Selection` object for a document named `Temp`. You can use these lines:

```
Documents("Temp").ActiveWindow.Selection.Font.Bold = True  
Documents("Temp").ActiveWindow.Selection.Font.Italic = True
```

Or, you can place these lines within a `With/End With` block, like this:

```
With Documents("Temp").ActiveWindow.Selection.Font  
    .Bold = True  
    .Italic = True  
End With
```

Granted, the `With` statement adds two lines of code. But if the object reference is complicated, it can save you some typing even if you need to set only two property values.



## Working with collections

A *collection* is a special type of object that holds one or more occurrences of another object. The Word object model, which I discuss further in the next chapter, has many collections that help organize the various objects used in Word. For example, you can store all open documents in a collection named Documents. And, you can access all paragraphs in a document via a collection named Paragraphs.

All collections have a `Count` property you can use to determine how many items are in the collection. For example, the following code displays the number of open documents:

```
MsgBox "There are currently " & Documents.Count _  
    & " documents open."
```

Many collections have an `Add` method that adds a new item to the collection. In many cases, the `Add` method creates a new object of the type appropriate for the collection, adds it to the collection, and returns the new object as its return value. For example, the following chunk of code creates a new document and then displays the document's name:

```
Dim d As Document  
Set d = Documents.Add  
MsgBox "The new document's name is " & d.Name
```

You can access the individual items in a collection by using an index number. For example, the following code displays the name of the first document in the Documents collection:

```
MsgBox Documents(1).Name
```

In many cases, you can use the name of an item instead of an index. For example, this statement closes the document named `TempDoc`:

```
Documents("TempDoc").Close
```

If no document is named `TempDoc`, the statement generates an error.



## Controlling Your Programs

The simplest macros execute their statements one at a time, in the sequence in which the statements are listed in the macro, until they reach the `End Sub` statement.

More sophisticated macros need more control over the sequence in which statements are executed. For example, you might need to skip over some statements based on the result of a condition test. Or, you might need to

create a loop of statements that repeats itself a given number of times or until a certain condition — such as reaching the end of the document — is met.

The following sections describe the VBA statements that let you control the flow of execution in your macro.

## ***The If statement***

Do you remember the Robert Frost poem that begins, “Two roads diverged in a yellow wood. . .”? That poem is an apt description of how the `If` statement works. The macro is rolling along, executing one statement after another, until it reaches an `If` statement. The `If` statement represents a fork in the road, and a choice must be made about which path to take.

Many macros need to make this type of decision as they execute. For example, a macro that creates an index entry for text selected by the user has to first determine whether the user has indeed selected any text. If so, the macro proceeds to create the index entry. If not, the macro does nothing, or perhaps it displays an error message along the lines of “You didn’t select any text!” To handle this decision processing, the macro uses an `If` statement.

VBA’s `If` statement is remarkably flexible, with several formats to choose from. All these forms involve three basic parts:

- ◆ A *condition test* that is evaluated to yield a value of `True` or `False`
- ◆ A *then* part, which supplies one or more statements that execute only if the result of the condition test is `True`
- ◆ An *else* part, which supplies one or more statements that execute only if the result of the condition test is `False`

For example, consider these lines that may be used in an index-marking macro:

```
If Selection.Type = wdSelectionNormal Then
    ActiveDocument.Indexes.MarkEntry Range:=Selection.Range,
    Entry:="index"
Else
    MsgBox ("Please select something to mark.")
End If
```

In this example, the `If` statement begins with a condition test that checks to see whether the selection is a normal text selection. If so, the `ActiveDocument.Indexes.MarkEntry` statement executes to insert an index field code. If not, a message box is displayed.



Each component of the `If` statement must fall on a separate line, as shown in the preceding example. In other words, you cannot place the statements on the same line as the `Then` or `Else` keywords.

The `Else` part of the `If` statement is optional. However, `End If` isn't optional: Every `If` statement must have a corresponding `End If`. (The only exception to this rule is the single-line `If` format that I explain later, in the section "The single-line `If`.")



Although indenting the statements isn't strictly required, using such indentation makes the structure of the `If` statement much more apparent. Consider the preceding example with no indentation:

```
If Selection.Type = wdSelectionNormal Then
ActiveDocument.Indexes.MarkEntry Range:=Selection.Range,
Entry:="index"
Else
MsgBox ("Please select something to mark.")
End If
```

Now imagine that instead of a single statement between the `Then` and `Else` lines, the macro has a dozen, with a dozen more lines between the `Else` and `End If` lines. Indentation is the only way to keep track of the overall structure of the `If` statement.

## Nested `If` statements

You can *nest* `If` statements — that is, you can include one `If` statement within the `Then` or `Else` part of another. For example:

```
If expression Then
    If expression Then
        statements
    Else
        statements
    End If
Else
    If expression Then
        statements
    Else
        statements
    End If
End If
```

Nesting can be as complex as you want. Just remember that you need an `End If` for every `If`. Be certain to use indentation so that each set of matching `If`, `Else`, and `End If` lines is properly aligned.

## ***The ElseIf structure***

VBA supports a special type of If structure, using the ElseIf keyword. The ElseIf form is a shorthand notation that allows you to simplify If structures that follow this form:

```
If expression Then
    statements
Else
    If expression Then
        statements
    Else
        If expression Then
            statements
        End If
    End If
End If
```

Using the ElseIf keyword, you can express the same structure like this:

```
If expression Then
    statements
ElseIf expression Then
    statements
ElseIf expression Then
    statements
End If
```

If this example is a little too abstract, consider a macro that displays one of three messages, depending on the day of the week. On Sunday, the macro displays “Time for Football!” On Saturday, it displays “Time to mow the lawn!” And, on any other day, it displays “Time to go to work!!!”

Here’s how to code this macro by using ordinary If statements:

```
DayOfWeek=Weekday(Now())
If DayOfWeek = 1 Then
    MsgBox("Time for football!")
Else
    If DayOfWeek = 7 Then
        MsgBox("Time to mow the lawn!!")
    Else
        MsgBox("Time to go to work!!!")
    End If
End If
```

Notice that the first Else clause contains a nested If statement. By using the ElseIf keyword, the second If statement is subsumed into the first, so a single If statement handles the whole thing:

```

DayOfWeek=Weekday(Now())
If DayOfWeek = 1 Then
    MsgBox("Time for football!")
ElseIf DayOfWeek = 7 Then
    MsgBox("Time to mow the lawn!!")
Else
    MsgBox("Time to go to work!!!")
End If

```

In this example, only one `End If` line is required because it has only one `If` statement. In other words, the `ElseIf` keyword doesn't require its own, matching `End If`.



In most cases, a `Select Case` statement implements `If` structures that require `ElseIf` clauses more easily, which I describe later in this chapter, in the section “The `Select Case` statement.”

### *The single-line If*

In VBA, you can use a single-line form of the `If` statement, which looks like this:

```
If condition Then statement [Else statement]
```

To use this form of the `If` statement, you must code the condition, `Then` clause, and `Else` clause (if any) all on the same line. For example:

```
If x > 0 Then MsgBox("X is " & x)
```

This example displays the message `X is n`, where `n` is the value of `x`. But the message displays only if `x` is greater than zero.

You can include more than one statement in the `Then` part by separating the statements with colons. But if more than one statement is required, or if an `Else` part is required, I suggest that you use the basic multiline `If` form instead of the single-line form.

## *For/Next Loops*

`For/Next` loops allow you to set up a basic looping structure in which a series of statements execute repeatedly, with the value of a counter variable increased by one (or more) each time until the counter variable reaches a certain value.

As a simple — if not quite practical — example, the following snippet inserts the numbers 1 through 100 in the current document, one number per line:

```
For x = 1 to 100
    Selection.InsertAfter Str(x) & Chr(13)
Next x
```

This For/Next loop causes the InsertAfter statement it contains to execute 100 times. The first time through, the variable *x* is set to the value 1. The second time, *x* is 2; the third time, 3; and so on, all the way to 100.

The general form of a For/Next loop is

```
For counter-variable = start To end [Step increment]
    statements...
Next [counter-variable]
```

You can specify any starting and ending value you want for the counter variable. In addition, you can specify an increment value by using the Step clause. You can use Step to create For/Next loops that count by twos or threes or any other value you want. If you omit Step, the default is 1.



The term *iteration* is often used to refer to each execution of a For/Next loop. For example, a For/Next loop that starts with the line For *x* = 1 To 10 iterates ten times.

## *While/Wend loops*

While/Wend loops provide a more sophisticated form of looping, in which the loop continues as long as a specified condition remains True. The general form is

```
While condition
    statements
Wend
```

The While loop starts by evaluating the condition. If it's True, the statements in the loop execute. When the Wend statement is encountered, the condition is evaluated again. If it's still True, the statements in the loop execute again. This cycle continues until the condition evaluates as False.



At this point, you need to know just what it means to say that a condition is True: In VBA, False is defined as the numeric value 0, and any nonzero value is considered to be True. For example, consider this While loop:

```
x = 5
While x
    Selection.InsertAfter Str(x) & Chr(13)
    x = x - 1
Wend
```

This loop continues to execute as long as `x` is not zero. The moment `x` becomes zero, VBA considers the condition expression to be `False` and the loop terminates. As a result, this `While` loop displays five message boxes, showing the values 5, 4, 3, 2, 1, and then it terminates.

To continue a loop as long as an expression evaluates to `False`, use `Not` as part of the condition test. For example:

```
x = 0
While Not x = 5
    Selection.InsertAfter Str(x) & Chr(13)
    x = x + 1
Wend
```

In this example, the loop repeats as long as `x` is not equal to 5.

## The Select Case statement

Life would be easy if it consisted entirely of either/or choices. But in the real world, you're often faced with many alternatives to choose from. And so it is in VBA. More than a few VBA functions return more complicated results than a simple yes/no, true/false, or 0/1. For example, `Selection.Style.Name` returns the name of the style applied to the current selection. You can use this information to cause your macro to take a different action depending on which style is applied to the selected paragraph.

The `Select Case` statement is designed for just this type of situation. It lets you test an expression for various values, executing different statements depending on the result. Its general form is

```
Select Case expression
    Case case-condition
        statements
    [ Case case-condition
        statements ]
    [ Case Else
        statements ]
End Select
```

The `Select Case` statement starts by evaluating the expression. Then it compares the result with the case conditions listed in the `Case` clauses, one at a time. When it finds a match, it executes the statements listed for the `Case` clause that matches, and it skips the rest of the `Select Case` statement. If none of the case conditions match, the statements in the `Case Else` clause execute. The key point is that only one of the `Case` clauses is selected for execution.

For each `Case` clause, *values* can be any of the following:

- ◆ **A single value, such as** `Case 4`: The `Case` clause is selected if the expression is equal to the value.
- ◆ **A list of expressions, such as** `Case 4, 8, 12, 16`: The `Case` clause is selected if the expression equals any of the listed values.
- ◆ **A range of values, separated with the keyword `To`, such as** `Case 4 to 8`: The `Case` clause is selected if the expression falls between the two values, inclusively.
- ◆ **The word `Is` followed by a relational comparison, such as** `Is > 4`: The relation is tested against the expression, and the `Case` clause is selected if the result of the comparison is `True`.

Here's an example of a `While` loop that includes a `Select Case` statement to count the number of `Heading 1`, `Heading 2`, and `Heading 3` styles from the current selection to the end of the document:

```
Dim Heading1Count As Integer
Dim Heading2Count As Integer
Dim Heading3Count As Integer
Dim s As Style
While Selection.Move(wdParagraph, 1)
    Select Case Selection.Style.NameLocal
        Case "Heading 1"
            Heading1Count = Heading1Count + 1
        Case "Heading 2"
            Heading2Count = Heading2Count + 1
        Case "Heading 3"
            Heading3Count = Heading3Count + 1
    End Select
Wend
```

In this example, the variables `Heading1Count`, `Heading2Count`, and `Heading3Count` count the number of headings for each level. The `Select Case` statement evaluates the `NameLocal` property of the selection's `Style` object. Then the `Case` clauses check for the values `"Heading 1"`, `"Heading 2"`, and `"Heading 3"`. If the `NameLocal` property returns one of these three values, 1 is added to the appropriate counter variable.



You can use `Case Else` to handle any values that aren't specifically mentioned in `Case` clauses.

## *User Input and Output*

The following sections describe various methods of displaying information and obtaining input from the user.



## MsgBox

The `MsgBox` command allows you to display a dialog box containing an informative message. `MsgBox` temporarily halts the macro until the user closes the message dialog box.

The `MsgBox` command has the following form:

```
MsgBox message [,buttons [,title] ]
```

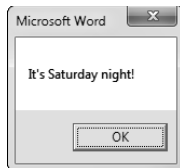
*message* is the text to display in the message, *buttons* is a constant that indicates the type of buttons to display, and *title* is the title displayed in the dialog box title bar.

To display a simple message, use a command such as this one:

```
MsgBox "It's Saturday night!"
```

This command displays the dialog box shown in Figure 2-1.

**Figure 2-1:**  
MsgBox  
dialog box.

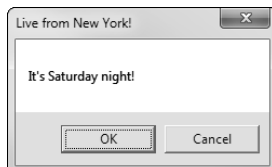


Here's a `MsgBox` call that specifies the type of buttons and a title:

```
MsgBox "It's Saturday night!", vbOKCancel, "Live from New York!"
```

Its output is shown in Figure 2-2.

**Figure 2-2:**  
Adding a  
title and  
button style.



The *buttons* argument controls *three* items at a time:

- ◆ Buttons that appear in the dialog box
- ◆ The icon that appears in the dialog box
- ◆ The button that is the default

(If you omit the default button argument, the first button is assumed to be the default.) Table 2-2 lists the values for these settings.

<b>Table 2-2                      MsgBox Type Values</b>		
<i>Group</i>	<i>Constant</i>	<i>Meaning</i>
Buttons	<code>vbOKOnly</code>	OK only
	<code>vbOKCancel</code>	OK and Cancel
	<code>vbAbortRetryIgnore</code>	Abort, Retry, and Ignore
	<code>vbYesNoCancel</code>	Yes, No, and Cancel
	<code>vbYesNo</code>	Yes and No
	<code>vbRetryCancel</code>	Retry and Cancel
	<code>vbCritical</code>	Critical icon
Icon	<code>vbQuestion</code>	A question mark
	<code>vbExclamation</code>	An exclamation mark
	<code>vbInformation</code>	Information only
	<code>vbDefaultButton1</code>	First button (OK, Yes, or Abort)
Default button	<code>vbDefaultButton2</code>	Second button (Cancel, No, or Retry)
	<code>vbDefaultButton3</code>	Third button (Cancel or Ignore)

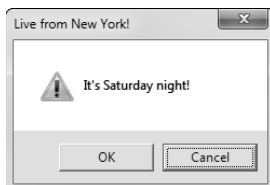


You can put these constants together to create composite styles. For example, this `MsgBox` command displays OK and Cancel buttons and a Stop symbol and makes the Cancel button the default:

```
MsgBox "It's Saturday night!", vbOKCancel + vbExclamation +  
    vbDefaultButton2, "Live from New York!"
```

Figure 2-3 shows the resulting dialog box.

**Figure 2-3:**  
Adding an  
icon and  
a default  
button.



MsgBox returns a value that indicates which button was clicked, as described in Table 2-3.

Table 2-3	MsgBox Return Values	
<i>Constant</i>	<i>Numeric Value</i>	<i>Button That Is Clicked</i>
vbOK	1	OK button
vbCancel	2	Cancel
vbAbort	3	Abort
vbRetry	4	Retry
vbIgnore	5	Ignore
vbYes	6	Yes
vbNo	7	No

## InputBox

The VBA function InputBox displays a dialog box that includes a single text field in which the user can type a response. The user's input is then returned to the macro as the function's return value.

The InputBox function accepts three arguments:

```
InputBox(prompt [,title] [,default])
```

For example, the following InputBox function asks the user to enter a name:

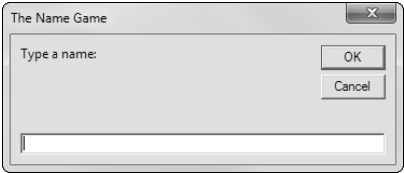
```
Name=InputBox("Type a name:")
```

This example shows how to provide your own title for the input dialog box and display a default choice:

```
Name=InputBox("Type a name:", "The Name Game", UserName)
```

The user's response returns in the Name variable. Figure 2-4 shows the dialog box that's displayed.

**Figure 2-4:**  
Input dialog  
box with  
icon and  
default  
button.



## ***User-Defined Procedures and Functions***

Most VBA macros consist of a single procedure. However, VBA lets you create additional procedures and functions that you can call from within the macro's main procedure. Procedures and functions are useful when you have a series of VBA commands or a complex calculation that you need to call on several times in a macro. By placing these commands in a procedure or function, you can code them once and call on them as many times as needed.

### ***Using procedures***

To create a procedure, use a `Sub/End Sub` command pair outside the `Sub/End Sub` command pair for the macro's main procedure. The statements that make up the procedure go between the `Sub` and `End Sub` commands, and the `Sub` command supplies the name of the procedure and any arguments that are passed to the subroutine. For example:

```
Sub SayHello
    BeepMsg "Hello World!"
End Sub
Sub BeepMsg(Message As String)
    Beep
    MsgBox Message
End Sub
```

In this example, the `BeepMsg` procedure displays a message and sounds a tone to get the user's attention. In the macro's main procedure (named `SayHello`), you can use `BeepMsg` as though it were a built-in VBA command.

### ***Using functions***

A function is similar to a subroutine, with one crucial difference: A *function* returns a value. Here's an example:

```
Sub GetAnAnswer
    If GetYesNo("Yes, or no?") Then
        BeepMsg "You said yes."
    Else
        BeepMsg "You said no."
    End If
End Sub
Sub BeepMsg(Message As String)
    Beep
    MsgBox Message
End Sub
```

```
Function GetYesNo(Message As String) As Boolean
    If MsgBox(Message, vbYesNo) = vbYes Then
        GetYesNo = True
    Else
        GetYesNo = False
    End If
End Function
```

In this example, the `GetYesNo` function uses a `MsgBox` function to display a message box with Yes and No buttons. The return value from the `MsgBox` function determines which button the user pressed, and the return value of the `GetYesNo` function is set to `True` if the user clicked Yes or `False` if the user clicked No. Back in the Main routine, the `GetYesNo` function is used in an `If` statement to display `You said yes` if the user clicks Yes or `You said no` if the user clicks No.



# *Chapter 3: More Programming: Using Word's Object Model*

---

## *In This Chapter*

- ✓ Understanding the basic objects of Word's object model
- ✓ Wrestling with documents
- ✓ Discovering selections and ranges
- ✓ Creating macros that manipulate text
- ✓ Creating macros that adjust text formatting

**W**ord's *object model* is the programming interface that lets you manipulate Word documents from VBA. The object model consists of a variety of different object types, such as documents, paragraphs, styles, tables, and so on. Each of these objects has its own properties and methods you can use from VBA. And many of these objects are contained in special collections.

The most difficult aspect of writing Word macros is dealing with this object model, in part because Word's object model is huge. (The people at Microsoft who designed Word's object model weren't minimalists.)

However, after you wrap your brain around a few basic concepts, such as the difference between selections and ranges, the object model begins to make sense. So, without further ado, this chapter presents an overview of the most commonly used parts of Word's object model.

## *An Overview of Important Word Objects*

Word's object model is far too complex to completely cover in a single chapter. All told, the object model has hundreds of different types of objects, collections, methods, and properties.

Fortunately, you don't have to know about all the objects, methods, and properties that make up the complete object model to start writing useful VBA macros. To give you an idea for the overall structure of the Word object model, Table 3-1 summarizes the function of the 30 or so most commonly used Word objects and the collections that contain them. You find more details about many of these objects throughout the rest of this chapter.



Don't let the sheer size of Table 3-1 overwhelm you. I include it here simply to familiarize you with the name and general purpose of Word's most commonly used objects. Don't feel like you have to memorize it or give it more than a casual glance for now. Just know that it's available when you need it.

Also, notice that some of the objects listed in this table have a corresponding *collection*. For example, all bookmarks for a document are stored in a `Bookmarks` collection, with each individual bookmark represented by a single `Bookmark` object. Not every object in this table has a corresponding collection, however. For example, just one `Application` object exists, so there's no need for a collection to store this object type.



By the way, AutoComplete can come in handy when you're working with objects in your VBA macros. When you type an object name and then type a period, the AutoComplete feature displays a list of the methods and properties available for the object.

**Table 3-1 Major Objects in the Word Object Model**

<i>Object</i>	<i>Collection</i>	<i>Description</i>
Application		The Microsoft Word application itself. This object is considered to be the start of the Word object model. Use the <code>Application</code> object to access other top-level objects. For example, use the <code>ActiveDocument</code> property to access the <code>Document</code> object for the current document.
Bookmark	Bookmarks	Used to access bookmarks. You can access the <code>Bookmarks</code> collection via a <code>Document</code> object.
Cell	Cells	Used to access cells in a table. You can access the <code>Cells</code> collection via a <code>Row</code> or <code>Column</code> object. You can also access an individual cell by using the <code>Cell</code> method of a <code>Table</code> object.
Column	Columns	Represents a column in a table. You can access the <code>Columns</code> collection via a <code>Table</code> object.
Diagram	Shapes	Represents a diagram. Diagrams are stored along with other shapes in a <code>Shapes</code> collection. You can access the <code>Shapes</code> collection via a <code>Document</code> object.



<i><b>Object</b></i>	<i><b>Collection</b></i>	<i><b>Description</b></i>
Document	Documents	Represents a single document. The Documents collection (available via the Application object) contains all open documents.
Email		Represents the e-mail information for a document and is accessed via the Email property of a Document object.
Envelope		Represents a document's envelope and is accessed via the Envelope property of a Document object.
Field	Fields	Represents a field. The Fields collection is accessed via a Document, Range, or Selection object.
Find		Provides the function of the Find command on the Home tab.
Font		Represents a font. Accessed via the Font property of a Selection, Range, or Style object.
HeaderFooter	HeaderFooters	Represents a header or footer for a section of a document. The HeaderFooters collection is accessed via the Headers or Footers property of a Section object.
List	Lists	Represents a list in a document. The Lists collection is accessed via a Document object.
Options		Represents the settings in the Word Options dialog box.
Page	Pages	Represents the pages in a document. The Pages collection is accessed via a Pane object, not a Document object, as you may expect. Go figure.
PageSetup		Represents the page setup, including margins and columns. Accessed via a Document or Section object.
Pane	Panes	Represents an open window pane used to view a document. The Panes collection is accessed via a Window object.

(continued)

**Table 3-1 (continued)**

<i><b>Object</b></i>	<i><b>Collection</b></i>	<i><b>Description</b></i>
Paragraph	Paragraphs	Represents a paragraph. The Paragraphs collection is accessed via a Document, Selection, or Range object.
ParagraphFormat		Represents the format for a Paragraph or Style object.
Range		Represents a range of a document. Many Word objects have a Range property, including Document, Section, Paragraph, and Bookmark.
Replacement		Provides the function of the Replace command on the Home tab.
Row	Rows	Represents a row in a table. The Rows collection is accessed via a Table object.
Section	Sections	Represents a document section. The Sections collection is accessed via a Document object.
Selection		Represents the current selection and is accessed via a Selection or Range object.
Shape	Shapes	Represents a shape. The Shapes collection is accessed via a Document object.
Style	Styles	Represents a style. The Styles collection is accessed via a Document object.
Table	Tables	Represents a table. The Tables collection is accessed via a Document, Range, or Selection object.
Template	Templates	Represents a template. All available templates (normal, attached, and global) are available in the Templates collection, which you can access via the Application object. Use the AttachedTemplate property of a Document object to access the template attached to a document.

<i>Object</i>	<i>Collection</i>	<i>Description</i>
TextColumn	TextColumns	Represents a column. The TextColumns collection is accessed via a PageSetup object.
Variable	Variables	Represents a document variable. The Variables collection is accessed via a Document object.
View		Represents the view settings, such as whether paragraph marks or field codes are visible. Accessed via a Window or Pane object.
Window	Windows	Represents an open window. The Application.Windows collection has all open windows. The Windows collection for a Document object has just those windows that are open for the document.

## Using the Application Object

The Application object is the starting point for Word's object model. It represents the Word application itself. Here are a few of its more interesting properties:

- ◆ **ActiveDocument:** A Document object that represents the active document — that is, the document from which the user ran the macro.
- ◆ **ActiveWindow:** A Window object that represents the active window.
- ◆ **Documents:** A collection that contains all currently open documents.
- ◆ **Options:** An Options object that represents the current settings for Word. You can usually set the options via the Word Options dialog box, which you access by choosing File⇨Options.
- ◆ **ScreenUpdating:** Controls whether the screen updates to reflect changes made to the document as a macro runs. Some macros run faster if you set ScreenUpdating to False.
- ◆ **Selection:** The text that's selected in the active document.
- ◆ **Templates:** A Templates collection that contains all available templates.
- ◆ **UserAddress:** The user's mailing address.
- ◆ **UserInitials:** The user's initials.
- ◆ **UserName:** The user's name.

- ◆ **Version:** The version of Word being used.
- ◆ **Windows:** A collection of Window objects that represents all open windows.

The Application object also has several methods that can be useful; in particular:

- ◆ **CleanString:** Removes nonprintable characters from a text string
- ◆ **GoBack:** Moves the insertion point back to previous locations where editing occurred
- ◆ **GoForward:** After using the GoBack method, moves forward to previous editing locations
- ◆ **ListCommands:** Creates a new document that lists all Word commands along with their keyboard shortcuts
- ◆ **OnTime:** Starts a timer that runs a macro at a specified time
- ◆ **Quit:** Quits Microsoft Word
- ◆ **Repeat:** Repeats the most recent editing action
- ◆ **Run:** Runs another macro
- ◆ **ScreenRefresh:** Updates the screen; useful if you've suppressed screen updating by setting the ScreenUpdating property to False
- ◆ **ShowClipboard:** Shows the Clipboard task pane

You can use many properties and methods of the Application object without explicitly specifying Application. For example, the following two lines of code are equivalent:

```
Application.Options.AllowFastSave = True
```

```
Options.AllowFastSave = True
```

The Application object properties and methods you can use without specifying the Application object are *global members*.

## ***Working with Documents***

You use the Document object to access a document in Word. The Document object has many useful properties and methods. Here are a few of the more interesting properties:

- ◆ **Name:** The document's name
- ◆ **Path:** The hard drive path for the document
- ◆ **ReadOnly:** The read-only status of the document

- ◆ `Saved`: False if the document has changed since it was last saved
- ◆ `Windows`: Returns a `Windows` collection that contains all windows in which the document is open
- ◆ `AttachedTemplate`: Returns a `Template` object for the template that's attached to the document

Here are some of the methods of the `Document` object:

- ◆ `Activate`: Makes the document the active document
- ◆ `Close`: Closes the document
- ◆ `PrintOut`: Prints all or part of the document
- ◆ `Save`: Saves the document and prompts the user for a name if the document has never been saved
- ◆ `SaveAs`: Saves the file with a specified name and path

## Accessing documents

If the document you want to access is the active document — the document from which the user ran the macro — you can just specify `ActiveDocument` to access its properties and methods. For example, the following statement saves the active document:

```
ActiveDocument.Save
```

You can access all documents that are open via the `Documents` collection. For example, the following code displays a message box that lists the name of each open document:

```
Dim msg As String
Dim d As Document
For Each d In Documents
    msg = msg & d.Name & VbCr
Next
MsgBox msg
```

You can use the `Documents` collection to access a document by name, like this:

```
Documents("Document1").Save
```

## Creating a document

You can create a new document by using the `Add` method of the `Documents` collection. The `Add` method returns the document that was created. The following code creates a new document and then displays the document's name in a message box:

```
Dim d As Document
Set d = Documents.Add
MsgBox d.Name
```



Creating a document makes the new document the active document. If your macro needs to return to the original active document, it needs to save the active document's name in a string variable and then use the variable later to return to that document; for example:

```
Dim s As String
s = ActiveDocument.Name
Dim d As Document
Set d = Documents.Add
Documents(s).Activate
```

In this example, the active document's name is saved in the string named `s`. Then a new document is created, and the original active document is reactivated.

## *Opening a document*

You might have noticed that the `Document` object has no `Open` method. However, the `Documents` collection does. The following example opens the document named `QuarterlyReport.doc` and assigns it to the `Document` variable named `report`:

```
Dim report As Document
Set report = Documents.Open("QuarterlyReport.doc")
```

When the `Open` method opens a document, it creates a `Document` object, adds it to the `Documents` collection, and makes the new document the active document. If the document specified by the string argument doesn't exist, an error message is displayed.

## *Understanding stories*

A Word document consists of one or more *stories*, which represent distinct areas of a document. All documents have a *main story* that contains the text displayed within the page margins. In addition, documents can have other stories, such as headers and footers, footnotes and endnotes, text that appears in frames, and comments.

If your macro works only with the contents of the main story, you don't need to worry about stories, because the main story is the default story of the `Document` object. But if you want to create a macro that manipulates text in another story, such as the footnote story, you have to know how to get to the right story.

To do that, you use the `StoryRanges` collection of the `Documents` object. One constant listed in Table 3-2 indexes this collection. For example, the following macro displays the number of paragraphs in the main story:

```
fr As Range
Set fr = ActiveDocument.StoryRanges(wdMainTextStory)
MsgBox fr.Paragraphs.Count
```

In this example, `wdMainTextStory` is used as the index for `ActiveDocument.StoryRanges` to get the main story. Then the `Paragraphs.Count` property displays the number of paragraphs in the story.



The Word object model doesn't have a separate `Story` object. Instead, each item in the `StoryRanges` collection is a `Range` object. I further discuss `Range` objects in the next section.

**Table 3-2** Constants for Story Types

<i>Constant</i>	<i>Description</i>
<code>wdCommentsStory</code>	Comments made by reviewers
<code>wdEndnoteContinuationNoticeStory</code>	Endnote continuation notices
<code>wdEndnoteContinuationSeparatorStory</code>	Endnote continuation separators
<code>wdEndnoteSeparatorStory</code>	Endnote separators
<code>wdEndnotesStory</code>	Endnotes
<code>wdEvenPagesFooterStory</code>	Footers for even pages
<code>wdEvenPagesHeaderStory</code>	Headers for even pages
<code>wdFirstPageFooterStory</code>	Footers for the first page
<code>wdFirstPageHeaderStory</code>	Headers for the first page
<code>wdFootnoteContinuationNoticeStory</code>	Footnote continuation notices
<code>wdFootnoteContinuationSeparatorStory</code>	Footnote continuation separators
<code>wdFootnoteSeparatorStory</code>	Footnote separators
<code>wdFootnotesStory</code>	Footnotes
<code>wdMainTextStory</code>	The main text of the document
<code>wdPrimaryFooterStory</code>	Footers
<code>wdPrimaryHeaderStory</code>	Headers
<code>wdTextFrameStory</code>	Text that appears in frames

## ***Understanding Selection and Range Objects***

One of the most confusing aspects of Word's object model is that two distinct objects refer to portions of a document: `Selection` and `Range`. The `Selection` and `Range` objects are similar, with many overlapping features. However, selections can do some things that ranges can't and vice versa.

In a nutshell, a `Selection` object refers to a portion of a document that is selected. The selection can be made by the user before running the macro or the macro itself can select text.

Like a selection, a *range* is a portion of a document. However, a range isn't selected, so it isn't highlighted in the document window. Ranges allow you to work on document text without drawing attention to the text.

A document can have only one selection at a time, unless the same document is open in two or more windows or window panes. In that case, each window or pane can have its own selection in the document. However, you can create as many ranges for a document as you want. And the ranges can overlap. For example, you can create a `Range` object that refers to the entire document, another `Range` object that refers to a particular paragraph within the document, and a third `Range` object that refers to a single word within that paragraph.

### ***Working with the Selection object***

The `Selection` object refers to the portion of the document that's selected. If you're writing a macro that manipulates the text selected by the user, you most likely need to use the `Selection` object. For example, this statement copies the selection to the Clipboard:

```
Selection.Copy
```

And this code formats the selected text as both bold and italic:

```
Selection.Font.Bold = True  
Selection.Font.Italic = True
```

You can access the text that's contained in a selection by using the `Text` property. For example, the following statement displays the selected text in a message box:

```
MsgBox Selection.Text
```

### ***Getting the right selection***

When you refer to a `Selection` object by using just the word `Selection`, you're accessing the selection in the active document window. This method is the most common way to use a `Selection` object. However, you can also



refer to other `Selection` objects. You can display each open document in more than one window, and you can split each of those windows into two panes. Because you can select text in any window pane, Word's object model lets you access a `Selection` object for each window pane. To access a selection in another document, use the `Document` object's `ActiveWindow` property, like this:

```
Documents("QuarterlyReport.doc").ActiveWindow.Selection
```

This statement accesses the selection in the active pane of the active window for the `QuarterlyReport` document.

If the window is split into panes, you can use the `Panes` property to access the selection in either pane. For example, the following code displays a message box that lists the text selected in both panes of the active window:

```
Dim msg As String
msg = ActiveWindow.Panes(1).Selection.Text + VbCr _
    + ActiveWindow.Panes(2).Selection.Text
MsgBox msg
```

## Dealing with selection types

A user may make many different types of selections before running your macro. Any macro that works with the `Selection` object needs to first ensure that the right type of selection is made. You can do that by checking the `Type` property. For example, this bit of code checks to ensure that the user makes a normal selection before copying the selection to the Clipboard:

```
If Selection.Type = wdSelectionNormal Then
    Selection.Copy
End If
```

The `Type` property can have any of the constant values listed in Table 3-3.

**Table 3-3 Constants for the `Selection.Type` Property**

<i>Constant</i>	<i>What It Selects</i>
<code>wdNoSelection</code>	Nothing
<code>wdSelectionBlock</code>	A vertical block, such as when the Alt key is used with the mouse
<code>wdSelectionColumn</code>	A table column
<code>wdSelectionFrame</code>	A frame
<code>wdSelectionInlineShape</code>	An inline shape
<code>wdSelectionIP</code>	An insertion point

(continued)

**Table 3-3 (continued)**

<i>Constant</i>	<i>What It Selects</i>
wdSelectionNormal	A normal block of text
wdSelectionRow	A table row
wdSelectionShape	A drawing shape

## *Working with Range objects*

A Range object identifies a portion of a document. The range can be as short as a single character or as long as the entire document. Range objects let you access text from within a macro without selecting the text onscreen or affecting the text that's selected.

### *Getting ranges*

Many objects with the Word object model have a Range property you can use to create a range that represents a portion of the document. Suppose that you want to access the first paragraph of the active document as a range. To do so, you can use this bit of code:

```
Dim r As Range
Set r = ActiveDocument.Paragraphs(1).Range
MsgBox r.Text
```

In this example, the Paragraphs collection accesses the first paragraph in the active document.

The following table lists the objects that have a Range property:

Bookmark	Hyperlink	Selection
Cell	InlineShape	SmartTag
Comment	List	Subdocument
Endnote	Paragraph	Table
Footnote	Revision	TableOfAuthorities
Formfield	Row	TableOfContents
Frame	Section	TableOfFigures
HeaderFooter		

Notice that among these objects is the `Selection` object. As a result, you can get a `Range` object that corresponds to the current selection, like this:

```
Dim r As Range
Set r = Selection.Range
```



Several properties of other objects also return `Range` objects. For example, the `Document` object has a `Content` property that returns a `Range` object representing the entire content of a document. For more ways to get ranges that represent portions of a document, see the section “Accessing text,” later in this chapter.

## Getting a range from a bookmark

Book II, Chapter 1 explains how you can use bookmarks to assign names to portions of a document. In effect, a *bookmark* is simply a named range that's saved along with the document. Bookmarks are commonly used in macros because they allow you to refer to a predefined area of text by name. If your macro needs to insert text into a document at predefined locations, bookmarks are the easiest way to do it.

To create a `Range` object for a bookmark, use code similar to this:

```
Dim r As Range
Set r = ActiveDocument.Bookmarks("FromAddress").Range
```

This code works fine if you're certain that the bookmark is always there. If you can't make that guarantee (and you can't, really), check first to make sure the bookmark exists, like this:

```
If ActiveDocument.Bookmarks.Exists("Customer") Then
    Dim r As Range
    Set r = ActiveDocument.Bookmarks("FromAddress").Range
Else
    MsgBox "Missing bookmark!"
End If
```

Here, the `Exists` method of the `Bookmarks` collection determines whether the `Customer` bookmark exists before it's accessed.

## Creating a range from scratch

You can also create a `Range` object by using the `Range` method of the `Document` object. Note that I said the `Range` *method*, not the `Range` *property*. The `Range` method of the `Document` object creates a new range for the portion of the document you specify. In the `Range` method, you must provide the starting and ending character position for the range. Here's an example:

```
Dim r As Range  
Set r = ActiveDocument.Range(0, 100)
```

A Range object that includes the first 100 characters of a document is created.

### ***Selecting a range***

The Range object has a Select method you can use to make a range the current selection; for example:

```
Dim r As Range  
Set r = ActiveDocument.Range(0, 100)  
r.Select
```

A Range object is created for the first 100 characters of a document. Then the Range object is selected.

## ***Moving Selections and Ranges***

The Selection and Range objects both have Start and End properties that indicate the character position of the start of the section or range and the position of the end of the section or range. You can set these properties directly to change a selection or range. For example, to collapse the active selection, you can use this code:

```
Selection.End = Selection.Start
```



The preceding statement leaves the insertion point at the start of the selection. If you want to collapse the selection and leave the insertion point at the end of the selection, use this code instead:

```
Selection.Start = Selection.End
```

You can also add or subtract values to the selection Start or End properties. For example, the following code extends the selection by one character:

```
Selection.End = Selection.End + 1
```

### ***Methods for moving the selection***

The Selection and Range objects sport several methods that let you move the start or end of the selection or range:

- ◆ **Collapse:** Makes the Start and End values the same. You can specify a direction as an argument to indicate in which direction the selection or range collapses. Specify wdCollapseStart to collapse to the start of the selection or range. Specify wdCollapseEnd to collapse to the end.

- ◆ **EndOf, StartOf:** Moves the start or end of the selection or range to the start or end of a specified unit. Table 3-4 lists the possible unit values, which are used in several other methods as well.
- ◆ **Expand:** Expands the selection to include the next unit.
- ◆ **Move:** Collapses the selection or range and then moves the selection or range the specified number of units.
- ◆ **MoveStart, MoveEnd:** Moves the start or end of the selection or range the specified number of units.
- ◆ **MoveStartUntil, MoveEndUntil:** Moves the start or end of the selection or range until a specified character is found.
- ◆ **MoveStartWhile, MoveEndWhile:** Moves the start or end of the selection or range until a character that isn't a specified character is found.
- ◆ **MoveUntil, MoveWhile:** Similar to MoveStartUntil/MoveEndUntil and MoveStartWhile/MoveEndWhile, but collapses the selection or range first.
- ◆ **Next, Previous:** Moves the selection to the next or previous specified unit.

<b>Table 3-4</b>	<b>Constants for Word Units</b>
<i>Constant</i>	<i>Description</i>
wdCharacter	Character
wdWord	Word
wdSentence	Sentence
wdParagraph	Paragraph
wdSection	Section
wdStory	Story
wdCell	Table cell
wdColumn	Table column
wdRow	Table row
wdTable	Table

## *A macro that moves the selection*

To illustrate how you can move the selection in a macro, the following example shows a macro that displays a message indicating how many times the font has changed in a selection:

```
Sub CountFontChanges()
    Dim iCount As Integer
    Dim iEnd As Integer
    Dim sFont As String
    Dim r As Range
    Set r = Selection.Range
    iEnd = r.End
    r.Collapse
    sFont = r.Font.Name
    While r.Start < iEnd - 1
        Set r = r.Next(wdCharacter, 1)
        If r.Font.Name <> sFont Then
            iCount = iCount + 1
            sFont = r.Font.Name
        End If
    Wend
    MsgBox "The selected text has " & iCount _
        & " font changes."
End Sub
```

This macro starts by assigning the selection to a `Range` object named `r`. It then saves the ending character position of the range in a variable named `iEnd` and collapses the range. Next, it saves the name of the font used for the first character in the selection in a variable named `sFont`. Then it launches into a `While` loop that continues until the start of the range reaches the character that was just before the last character of the original selection.

Within the loop, the `Next` method moves the range to the next character in the document. Then the font of this character is compared with the previously saved font name. If it's different, the `iCount` variable is incremented to indicate that the font has changed and the name of the new font is saved in the `sFont` variable. When the loop finishes, the message box displays how many times the macro determined that the font changed.



You can accomplish this type of character-by-character movement through a selection or range in many different ways. For example, I could have coded the `While` loop like this:

```
While r.Start < iEnd - 1
    r.Start = r.Start + 1
    r.End = r.Start + 1
    If r.Font.Name <> sFont Then
        sFont = r.Font.Name
        iCount = iCount + 1
    End If
Wend
```

Also, as I discuss in the next section, you can code this macro by using the `Characters` collection of the `Selection` object.

## Working with Text

The following sections describe various ways to work with text in a macro.

### Accessing text

The Document, Selection, and Range objects have several properties you can use to access the contents of a selection or range. These properties work the same whether you're using a Document, Selection, or Range object. The following paragraphs describe how they work:

- ◆ **Text:** Returns a string that contains the text marked by the selection or range.
- ◆ **Characters:** Returns a collection of Range objects, each representing one character of the selection or range. **Note:** There is no Character object. Instead, each character is represented by a separate Range object.
- ◆ **Words:** Returns a collection of Range objects, each representing one word of the selection or range. As with characters, no separate object exists for words. Instead, each word is represented by a Range object.
- ◆ **Sentences:** A collection of Range objects, each representing one sentence of the selection or range. Again, no separate object exists for sentences. Each sentence is represented by a Range object.
- ◆ **Paragraphs:** A collection of Paragraphs, each representing one paragraph of the selection or range. Once again, there is no — made you look! Word's object model *does* have a separate Paragraph object. That's because many formatting options, such as line spacing, indentation, and tabs, are applied to paragraphs via the Paragraph object.
- ◆ **Sections:** Returns a collection of Section objects, representing the sections in the selection or range.

You can easily implement the CountFontChanges macro that I present earlier in this chapter (in the section “A macro that moves the selection”) by using the Characters collection of the Selection object:

```
Sub CountFontChanges()
    Dim iCount As Integer
    Dim sFont As String
    Dim r As Range
    sFont = Selection.Characters(1).Font.Name
    For Each r In Selection.Characters
        If r.Font.Name <> sFont Then
            sFont = r.Font.Name
            iCount = iCount + 1
        End If
    Next
```

```
MsgBox "The selected text has " & iCount _  
    & " font changes. "  
End Sub
```

Here, the `For Each` loop accesses the characters in the selection one at a time, so the macro doesn't have to keep track of the start and end of the range as it loops.

## *Inserting text*

The `Selection` and `Range` objects offer the following methods for inserting text into your document:

- ◆ **InsertAfter:** Inserts the specified text after the selection or range. The selection or range expands to include the new text. For example, the following statement inserts text after the selection:

```
Dim s As String  
s = "So let it be written, so let it be done."  
Selection.InsertAfter(s)
```

- ◆ **InsertBefore:** Inserts the specified text before the selection or range. The selection or range expands to include the new text. Here's an example that writes text before the selection:

```
Selection.InsertBefore("Listen up!")
```

- ◆ **InsertParagraph:** Replaces the selection with an empty paragraph.
- ◆ **InsertParagraphAfter:** Inserts an empty paragraph after the selection or range. The selection or range expands to include the new paragraph.
- ◆ **InsertParagraphBefore:** Inserts an empty paragraph before the selection or range. The selection or range expands to include the new paragraph.



Rather than use the `InsertParagraph` methods, you can also use the special VBA constant `vbCr` to insert a paragraph mark. For example, the following code moves to the end of the current paragraph and then inserts the text *Listen up!* as a separate paragraph:

```
Selection.Move (wdParagraph)  
Selection.InsertAfter ("Listen up!" & vbCr)
```

You can use a similar constant, `vbTab`, to insert tab characters; for example:

```
Dim s1, s2 As String  
s1 = "Hello"  
s2 = "There"  
Selection.InsertAfter (s1 & vbTab & s2 & vbCr)
```



Here, the words `Hello` and `There` are inserted into the document, separated by a tab.

### ***Deleting text***

My English teacher in the tenth grade said that any book report that contained the words *stupid*, *dumb*, or *boring* would get an automatic F. Too bad, because I read a lot of books that were stupid, dumb, and boring. I probably would have passed the class if only I had a macro that automatically deleted those words from my book reports.

Here's a macro that uses the `Delete` method of a `Range` object to delete those three words from an entire document, and then it displays a message to tell you how many words were deleted:

```
Dim iCount As Integer
Dim r As Range
For Each r in ActiveDocument.Words
    Select Case Trim(r.Text)
        Case "stupid", "dumb", "boring"
            r.Delete
            iCount = iCount + 1
    End Select
Next
MsgBox "Deleted " & iCount & " words."
```

Here, any occurrence of the forbidden words is deleted from the document.

### ***Copying, cutting, and pasting***

Both the `Selection` object and the `Range` object support the standard copy, cut, and paste operations via the Clipboard. Not surprisingly, the methods are

- ◆ **Copy:** Copies the selection or range to the Clipboard.
- ◆ **Cut:** Cuts the selection or range to the Clipboard.
- ◆ **Paste:** Pastes the contents of the Clipboard into the selection or range. Use the `Collapse` method to collapse the selection or range if you don't want the Clipboard contents to replace the contents of the selection or range.

For example, the following code copies the contents of the first paragraph in the document to the selection:

```
ActiveDocument.Paragraphs(1).Range.Copy
Selection.Collapse
Selection.Paste
```

Note two things about this example: First, I had to use the `Range` property of the paragraph to get to the `Copy` method — because the `Paragraph` object doesn't have a `Copy` method. Second, I collapsed the selection before pasting it so that the macro doesn't overwrite any text.



You don't always have to use the Clipboard to copy text to another location in the document. For example, the following code does the job without involving the Clipboard:

```
Dim r As Range
Set r = ActiveDocument.Paragraphs(1).Range
Selection.Collapse
Selection.InsertAfter (r.Text)
```

## *Formatting Text*

All options for formatting text are available through objects you can access as properties of the `Selection` or `Range` objects. For example, to make the current selection bold, set `Selection.Font.Bold` to `True`.

The following paragraphs describe the formatting objects you can access via the properties of the `Selection` or `Range` objects:

- ◆ **Borders:** A collection of `Border` objects that define the borders for the selection or range.
- ◆ **Font:** A `Font` object that lets you set character formatting. For more information, see the later section “Using the Font object.”
- ◆ **ParagraphFormat:** A `ParagraphFormat` object that controls paragraph formatting, such as line spacing, alignment, and indentation. For more information, see the section “Using the ParagraphFormat object.”

Two other formatting properties you might want to use are

- ◆ **Style:** Sets the name of the style for the selection or paragraph. For example, to set the selected paragraphs back to the Normal style, use this code:
- ◆ **TabStops:** A collection of `TabStop` objects. This collection is available only from a `Paragraph` object. For example, this code accesses the first Tab stop for the first paragraph in a selection:

```
Dim t As TabStop
Set t = Selection.Paragraphs(1).TabStops(1)
```

## Using the Font object

The `Font` object gives you access to all the character formatting options available via the Font dialog box (which can be accessed via the dialog box launcher in the Font group of the Home tab). As a result, most of its properties look familiar. Table 3-5 lists the properties you're most likely to use.

Although you must access most of these properties via the `Font` property of a `Selection` or `Range` object, the `Range` object has shortcuts to the `Bold`, `Italic`, and `Underline` properties. Thus, you can set a range to bold, italic, or underline without using the `Font` object. For example, this statement sets the first sentence of the active document to bold:

```
ActiveDocument.Sentences(1).Bold
```



The `Sentences` collection is a collection of `Range` objects, so `Sentences(1)` returns a `Range` object for the first sentence in the collection.

Many font properties can be set to `True`, `False`, or the special Word constant `wdToggle`. The `wdToggle` constant changes the value of the property from whatever its current value is. So if the property is `True`, `wdToggle` changes it to `False`. If it's `False`, `wdToggle` changes it to `True`. This constant mimics the behavior of many formatting shortcut keys, such as `Ctrl+B` or `Ctrl+I`.

**Table 3-5 Properties of the Font Object**

<i>Property</i>	<i>Description</i>
<code>Bold</code>	Applies bold formatting
<code>Color</code>	Sets the font color
<code>DoubleStrikethrough</code>	Applies double-strikethrough formatting
<code>Emboss</code>	Embosses the text
<code>Engrave</code>	Engraves the text
<code>Hidden</code>	Hides the text
<code>Italic</code>	Applies italic formatting
<code>Kerning</code>	Sets the smallest point size at which Word applies kerning
<code>Name</code>	Sets the font name
<code>Outline</code>	Applies outline formatting

(continued)

**Table 3-5 (continued)**

<i>Property</i>	<i>Description</i>
Position	Raises or lowers the text by the number of points specified
Shading	Sets shading for the text
Shadow	Applies a shadow effect
SmallCaps	Applies small cap formatting
Strikethrough	Applies strikethrough formatting
Subscript	Applies subscript formatting
Superscript	Applies superscript formatting
Underline	Underlines the text
UnderlineColor	Sets the color for the underline

### ***Using the ParagraphFormat object***

The ParagraphFormat object gives you access to all the paragraph formatting options available via the Paragraph dialog box. (You can access this dialog box by clicking the dialog box launcher in the Paragraph group on the Home tab.) As a result, most of its properties look familiar. Table 3-6 lists the most commonly used properties of the ParagraphFormat object.



The properties that require a measurement value (such as FirstLineIndent) require the measurement in points. There are 72 points in an inch. But if you don't want to do that calculation manually, you can use the InchesToPoints function to do the calculation for you. For example, this code sets the FirstLineIndent to 0.75 inches:

```
With Selection.ParagraphFormat
    .FirstLineIndent = InchesToPoints(0.75)
End With
```

**Table 3-6 Properties of the ParagraphFormat Object**

<i>Property</i>	<i>What It Specifies</i>
Alignment	The alignment (most common values: wdAlignParagraphLeft, wdAlignParagraphCenter, wdAlignParagraphRight, and wdAlignParagraphJustify)
Borders	Text borders
FirstLineIndent	Indentation of first line, in points
KeepTogether	Whether paragraph remains on one page
KeepWithNext	Whether paragraph is on same page as next paragraph
LeftIndent	Left indent in points
LineSpacing	Line spacing in points
LineSpacingRule	Type of line spacing (options: wdLineSpace1pt5, wdLineSpaceAtLeast, wdLineSpaceDouble, wdLineSpaceExactly, wdLineSpaceMultiple, and wdLineSpaceSingle)
PageBreakBefore	Whether paragraph begins new page
RightIndent	Right indent in points
Shading	Paragraph shading
SpaceAfter	Spacing after paragraph, in points
SpaceAfterAuto	Whether Word automatically sets space that appears after paragraph
SpaceBefore	Spacing before paragraph, in points
SpaceBeforeAuto	Whether Word automatically sets the space that appears before paragraph
Style	Name of style for paragraph
TabStops	TabStops collection for paragraph



# Chapter 4: Creating UserForms

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## *In This Chapter*

- ✓ Adding a UserForm to a macro project
- ✓ Discovering labels and text boxes
- ✓ Fiddling with frames
- ✓ Carrying on with check boxes and option buttons
- ✓ Working with combo boxes
- ✓ Creating list boxes that allow multiple selections

**T**his chapter shows you how to create macros that display customized dialog boxes known as *UserForms*, which are interactive, customizable forms in a Word document. Their reason for existence is to collect information from users and then perform actions based on that information. UserForms are crucial to creating sophisticated Word macros that automate routine tasks. But UserForms aren't just for complicated macros. Sometimes, even a simple macro can benefit from a modest UserForm to gather a few critical items of data from the user before proceeding. You can find out more about macros in Chapter 1 of this minibook.

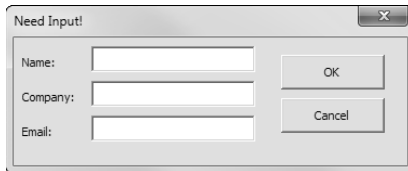
## *Understanding UserForms*

UserForms help you obtain any kind of information you need from the user in a single interaction. Suppose that you need to know a person's name, company, and e-mail address. You can use a series of `InputBox` statements, such as these:

```
Dim Name, Company, EmailAddress As String
Name=InputBox("Name:", "Info", Name)
Name=InputBox("Company:", "Info", Company)
Name=InputBox("Email Address:", "Info", EmailAddress)
```

Wouldn't simply displaying a single dialog box to gather all three items be more convenient for the user? Using UserForms, you can, as shown in Figure 4-1.

**Figure 4-1:**  
A custom  
UserForm.



UserForms aren't as powerful as the forms you can create in a full-fledged programming language, such as Visual Basic or C#. However, you can create forms by using any of the dialog box controls described in Table 4-1.

Table 4-1 UserForm Controls		
<i>What It Looks Like</i>	<i>Name</i>	<i>What It Does</i>
	Label	Displays text on the form
	TextBox	Lets the user enter text
	ComboBox	Displays a drop-down list
	ListBox	Displays a scrollable list
	OptionButton	Lets you select one of several alternative settings
	CheckBox	Supplies a yes/no or on/off setting
	ToggleButton	Lets you select yes/no values
	Frame	Creates a group of controls
	CommandButton	Invokes a Sub procedure when clicked
	TabStrip	Divides a form into multiple tabs
	MultiPage	Divides a form into multiple pages
	ScrollBar	Displays a scroll bar





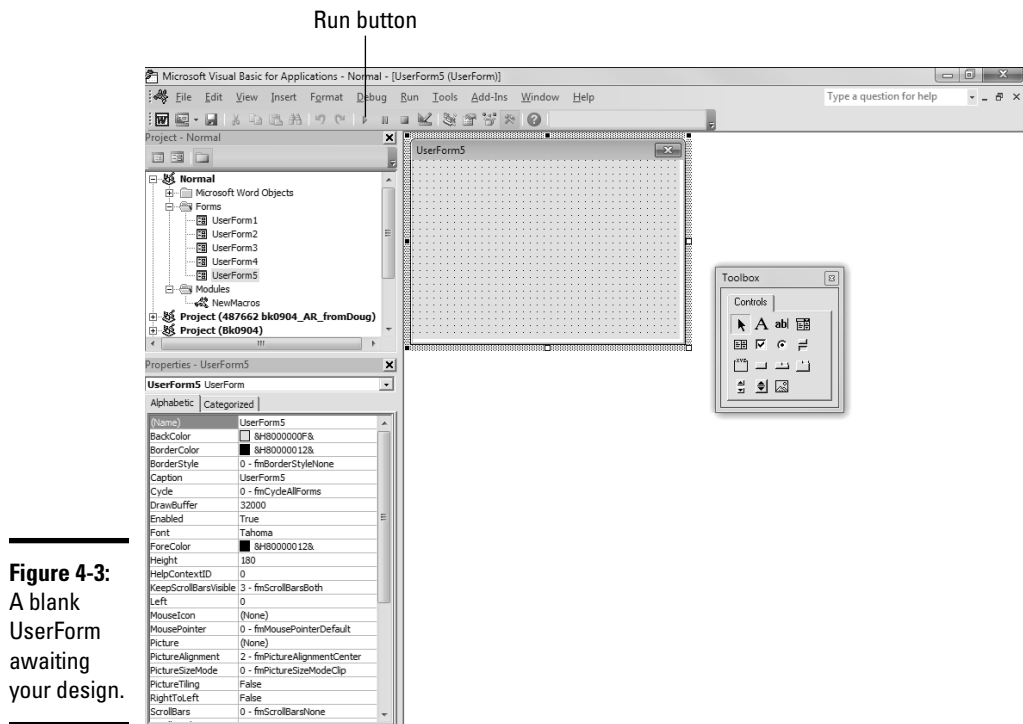
To create a UserForm, follow these steps:

**1. Select the project you want to add the UserForm to in Project Explorer.**

The Project Explorer window appears in the upper-left corner of the VBA editor. Each open document and template is listed as a project. If you want to create a UserForm in the `Normal.dotm` template so that it's available to any document, you can just select `Normal` in Project Explorer. But if you want to create the UserForm in another template, you must first open that template by choosing `File→Open`. If you simply open a document that's attached to the template, the template is listed in Project Explorer, but you can't access it.

**2. Choose `Insert→UserForm`.**

A blank UserForm is created, as shown in Figure 4-3.



**3. To add a control to the form, click the control you want to add in the Toolbox and then click the form where you want to add the control.**

You can add any of the controls listed earlier, in Table 4-1. I explain each of the controls later in this chapter.

After you add a control, you can drag it around the form to its final position. And, you can resize the control by clicking the control to select it and then dragging one of its size handles.

- 4. To change a property, select the control you want to change and then use the Properties pane (in the lower-left part of the window) to set the property you want to change.**

To set a property for the form itself, click the form anywhere outside one of its controls. You find more information about setting properties for form control in the next section.

You can also use the drop-down list that appears at the top of the Properties pane to choose a form or control.

- 5. To see how your form will appear when run, click the Run button.**

Running the form from the VBA editor in this way is useful for ensuring that the form looks the way you want.

- 6. When you're satisfied, click the form's Close button to close the form.**

- 7. Write whatever code is necessary to implement the form's processing requirements.**

To add code that executes whenever the user clicks a button, double-click the button in the form designer. This action opens the VBA editor and creates a `Sub` procedure that's all set up to run when the user clicks the control.

You might also want to write code that executes when the form is first displayed. To do that, switch to the code window by choosing `View⇨Code`. Then choose the form from the drop-down list at the top left of the code window and choose `Initialize` from the drop-down list at the top right of the code window. A `Sub` procedure automatically runs when the form is initialized. (One common use for the form `Initialize` procedure is to add items to a drop-down list or list box control.) For more information, see the sections "Using Combo Boxes" and "Using List Boxes," later in this chapter.

Here are a few other points to ponder as you create UserForms:

- ◆ Be sure to save your work often by clicking the Save button in the VBA editor.
- ◆ To remove a control from the form, click the control to select it and press Delete.
- ◆ If your form requires several similar controls, create one of them first and adjust its properties the way you want. Then use good old Copy and Paste commands to duplicate it. (Select the control, press `Ctrl+C`, and then click the form to select it and press `Ctrl+V`.)



- ◆ If you inadvertently double-click a control and the code window pops up, you can select and delete the `Sub` and `End Sub` statements that are generated. To return to the form designer, choose `View⇨Object`.
- ◆ If the Toolbox disappears on you, you can restore it by choosing `View⇨Toolbox`.
- ◆ If you accidentally create the form in the wrong template, you can use the Project Explorer window to drag the form to the correct template.
- ◆ If you want the form to appear automatically whenever you create a new document based on the template that contains the form, create an `AutoNew` macro in the template. This macro can then call the form's `Show` method to show the form. For example:



```
Sub AutoNew()  
    UserForm1.Show  
End Sub
```

- ◆ Even if you include an `AutoNew` macro to automatically call up the form when a new document is created, you might also want to provide another way for the user to access the form after the document opens. For example, you might want to create a macro similar to the preceding `AutoNew` macro to show the form. Then you can add a button to the Quick Access toolbar to call up the form.

## *Working with Controls*

Most of the work of creating macros that use `UserForms` is setting up the controls that appear on the form. After you add a control to a form, you need to adjust the control's properties. You can do that via the Properties pane. First, select the control whose properties you want to adjust. Then locate in the Properties pane the property you want to adjust and specify whatever settings you want to apply.

All controls have several properties in common. In particular:

- ◆ **Name:** Specifies the name of the control, which is used to access the control from code. Provide a meaningful name for every control you need to refer to in code. For controls, such as labels, that aren't referred to in code, you can leave alone the default names (such as `Label1`).

When you create a name for a control, begin with a short prefix to indicate its type. For example, give text boxes names such as `txtName` and `txtEmail`, and give buttons names such as `btnOK` and `btnCancel`.

- ◆ **Caption:** Sets the text that the control displays; not every control has a `Caption` property, but most do. The default value for the `Caption` property is the control's name, so you almost certainly should change it to a more suitable name.

- ◆ **Accelerator:** Specifies the letter that the user can use along with the Alt key to activate the control without using the mouse. The first occurrence of this letter is underlined in the control's caption. For example, if you specify `Proceed` for the `Caption` property and "o" for the `Accelerator` property, the caption appears as `Proceed` on the control.
- ◆ **TabStop:** Indicates whether the user can move to the control by pressing the Tab key. Controls that accept input usually have this property set to `True`.
- ◆ **TabIndex:** Specifies the order in which the Tab key cycles through the controls. After you set up all the controls on a form, you can set the `TabIndex` property of each control to get the tab order right. For example, set the `TabIndex` to 1 for the control you want to be first in the tab order; 2 for the control you want to be second; and so on.
- ◆ **Enabled:** Indicates whether the control is enabled. If you set this property to `False`, the control is dimmed.
- ◆ **ControlTip:** Supplies text that's displayed as a tip if the user hovers the cursor over the control for a few moments. You can use this property to provide additional information about what the control does or what happens if the user clicks the control.

When you have a control's properties set the way you want, you can add code for the control by double-clicking the control. Double-clicking opens the code window and creates a `Sub` procedure that executes if the user clicks the control. In most cases, you create a `Sub` procedure only for command button controls. However, you can create a procedure to handle clicks for any control on a `UserForm`, not just for command buttons.

## Using Command Buttons

The command button is the workhorse of most `UserForms`. You usually need to set one property for a command button: `Caption`. Use the `Caption` property to specify the text you want to appear on the button. You might also want to set the `Accelerator` property for command buttons.

The hard part of working with command buttons is writing the code that is supposed to execute when the user clicks the button. To create this code, simply double-click the button in the form designer.

### Creating a Cancel button

All forms need a Cancel button that lets the user bail out of the form without doing anything. The click procedure for the Cancel button typically looks like this:

```
Private Sub btnCancel_Click()  
    Hide  
End Sub
```

The `Hide` statement is a call to the `Hide` method of the current form, which closes the form and returns the user to the document. You can specify the form name on this statement, but the current form is assumed by default if you don't, so just coding `Hide` is enough.



The `Hide` method doesn't stop the macro from running. If your macro needs to do additional work after it closes the form, it can include additional statements after the `Hide` method call.

## *Creating an OK button*

Most UserForms also contain a button that processes the data the user enters on the form. This button goes by various names, such as `OK` or `Save`, depending on what the form does. In many cases, the code behind this button extracts the data the user entered in the form and inserts it into the document, either at the location of the insertion point or at predefined locations marked by bookmarks.

For example, the following code shows the click procedure for the `OK` button in the form shown earlier (refer to Figure 4-1). In this example, the information from the three text boxes is inserted into the document after the selection:

```
Private Sub CommandButton1_Click()  
    Selection.InsertAfter txtName.Text & vbCrLf  
    Selection.InsertAfter txtCompany.Text & vbCrLf  
    Selection.InsertAfter txtEmail.Text & vbCrLf  
    Selection.Collapse wdCollapseEnd  
    Hide  
End Sub
```

After the text is inserted, the selection collapses and the form closes.

Suppose that you want to insert the text in an area of the document marked by a `Customer` bookmark rather than in the selection. In that case, use code similar to this:

```
Private Sub CommandButton1_Click()  
    If ActiveDocument.Bookmarks.Exists("Customer") Then  
        Dim r As Range  
        Set r =ActiveDocument.Bookmarks("Customer").Range  
        r.InsertAfter txtName.Text & vbCrLf  
        r.InsertAfter txtCompany.Text & vbCrLf  
        r.InsertAfter txtEmail.Text & vbCrLf  
        Hide  
    Else
```

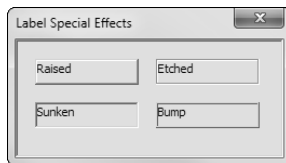
```
        MsgBox "Missing bookmark!"  
    End If  
End Sub
```

## Using Labels

Label controls display text on the form. For plain, unexciting labels, just drag a label control from the Toolbox onto the form, set the label's `Caption` property to the text you want to display, and be done with it. For fancier labels, you can set the following properties by using the Properties pane:

- ◆ **Font:** The font used for the `Caption` text. When you set the `Font` property in the Properties pane, a Font dialog box appears, allowing you to choose the font, style (such as bold or italic), and size.
- ◆ **TextAlign:** Lets you choose the text alignment: left, centered, or right.
- ◆ **SpecialEffect:** Lets you apply one of the four special effects shown in Figure 4-4.
- ◆ **WordWrap:** Indicates whether the text wraps onto multiple lines if the label isn't wide enough to display it all.

**Figure 4-4:**  
Special  
effects  
for label  
controls.



## Using Text Boxes

The text box is the main tool you use to gather text input from the user for your macro. The user's input is available by using the `Text` property. The following code assigns the text entered into a text box named `txtCompany` to a variable named `Company`:

```
Company = txtCompany.Text
```

You can also use the `Text` property to assign an initial value to a text box. Then, if the user doesn't change the value, the initial value is retained. You can set the initial text value with an assignment statement such as this example in the form's `Initialize` procedure:

```
txtCompany.Text = "John Wiley & Sons, Inc."
```

Or, you can set the initial value in the Properties pane when you design the form.

Text boxes have a few other noteworthy properties:

- ◆ **MaxLength**: Limits the number of characters the user can enter. When the entry exceeds the **MaxLength** limit, anything else the user types is ignored.
- ◆ **MultiLine**: If set to **True**, allows the user to enter more than one line of text into the text box. The user must press Shift+Enter to create a new line. You usually increase the height of the text box to display the additional lines.
- ◆ **PasswordChar**: Allows you to create a password entry field. Rather than display the text entered by the user, the password entry field displays the password character. That way, nosey bystanders can't see what the user typed.

## *Using Frames*

A *frame control* is a container that lets you group controls on a form. A frame not only adds visual structure to the form but also helps out when you use option buttons, as I discuss in the next section.

To use a frame control, just drag a frame from the Toolbox onto the form and then resize it and position it however you want. Then you can drop other controls onto the frame.

The only property you're likely to set for a frame control is the **Caption** property, which sets the text displayed in the margin of the frame. You might also want to experiment with the **SpecialEffect** property if you want to give the frame a nonstandard look.

## *Using Check Boxes and Option Buttons*

Check boxes and option buttons allow the user to select options. For example, Figure 4-5 shows a *UserForm* that gathers information needed to order a pizza. The user selects the size of the pizza from a group of option buttons and chooses toppings by selecting check boxes. (This *UserForm* also uses frames to provide nice borders around the Size and Toppings sections of the dialog box.)

When you create a check box or option button, you use the **Caption** property to set the text that describes the option. Then, in your code, you can use the **Value** property to determine whether the check box or option button is selected.



**Figure 4-5:**  
A pizza  
order form.

## Grouping option buttons

The main difference between check boxes and option buttons is that check boxes are independent of one another. In contrast, option buttons travel in groups, and a user can select only one option button in a group at a time. To indicate which group an option button belongs to, you set the `GroupName` property. If a form has only one group of option buttons, you can leave this property blank. You can also ignore the `GroupName` property if you place each group of option buttons in a separate frame. But if you have two or more groups of option buttons and they're not isolated in frames, you must set this property to indicate which group each option button belongs to.

## Testing option button and check box values

You can test the setting of a check box or option button in code by testing the `Value` property for `True` or `False`. For example, the following code runs when the user clicks the OK button for the UserForm shown earlier, in Figure 4-5:

```
Private Sub btnOK_Click()
    Dim s As String
    s = "Pizza size: "
    If obtnSmall.Value = True Then
        s = s & "Small" & vbCrLf
    ElseIf obtnMedium.Value = True Then
        s = s & "Medium" & vbCrLf
    ElseIf obtnLarge.Value = True Then
        s = s & "Large" & vbCrLf
    ElseIf obtnGiant.Value = True Then
        s = s & "Giant" & vbCrLf
    End If
    s = s & "Toppings: " & vbCrLf
    If chkPepperoni.Value = True Then
        s = s & vbTab & "Pepperoni" & vbCrLf
    
```

```

End If
If chkSausage.Value = True Then
    s = s & vbTab & "Sausage" & vbCr
End If
If chkMushrooms.Value = True Then
    s = s & vbTab & "Mushrooms" & vbCr
End If
If chkOlives.Value = True Then
    s = s & vbTab & "Olives" & vbCr
End If
If chkGarlic.Value = True Then
    s = s & vbTab & "Garlic" & vbCr
End If
If chkAnchovies.Value = True Then
    s = s & vbTab & "Anchovies" & vbCr
End If
Selection.InsertAfter s
Hide
End Sub

```

In this example, a string variable named `s` constructs the text that's inserted into the document. First, the option buttons are checked in a series of `If/ElseIf` statements to determine which size was selected. Then a series of separate `If` statements determine which toppings to include in the order. (For more information about string variables, refer to Chapter 2 of this minibook.)

Suppose that you run this form, select a large pizza, and select the Pepperoni, Garlic, and Anchovies check boxes. In that case, the following text is inserted into the document when you click OK:

```

Pizza size: Large
Toppings:
    Pepperoni
    Garlic
    Anchovies

```

You'd better be hungry because you'll probably end up eating this one by yourself. You'd better have some breath mints handy, too.

## *Using Combo Boxes*

A *combo box* displays a drop-down list that lists options from which the user can choose. Depending on how you configure the combo box, the user might also be able to type a selection if one of the items in the list isn't suitable.



I discuss list boxes (which are similar to combo boxes) in the later section "Using List Boxes."

When you create a combo box, you can set the `Style` property to indicate the type of combo box you want to create. Your choices are

- ◆ `DropDownCombo`: The user enters a value in the text box part of the control.
- ◆ `DropDownList`: The user is forced to choose an item from the list.

To use a combo box in a macro, you have to know how to write code to do two things: load the items for the list into the combo box and determine which of the list items the user selected. I describe these coding techniques in the following sections.

### *Loading items into a combo box*

To load items into a combo box, you use the `AddItem` method. The best time to use this method is when the form is initializing. For example, here's an `Initialize` procedure for a form that loads a combo box with possible sizes for the pizza:

```
Sub UserForm1_Initialize()  
    cboSize.AddItem "Small"  
    cboSize.AddItem "Medium"  
    cboSize.AddItem "Large"  
    cboSize.AddItem "Giant"  
End Sub
```

And, here's a `For Each` loop that loads the names of all available fonts into a combo box:

```
Dim FontName As Variant  
For Each FontName in FontNames  
    cboFonts.AddItem FontName  
Next
```

### *Determining which item was selected*

To determine which item the user has selected from a combo box, use the `Value` property. For example:

```
Dim Size As String  
Size = cboSize.Value
```

If, for some reason, you're interested in knowing the index number of the item chosen by the user, use the `ListIndex` property instead. However, be aware that unlike most VBA indexes, the `ListIndex` value for the first item in the combo box is 0, not 1.

### *Setting the selected item*

In some cases, you want to set the item that's selected in a combo box from VBA. For example, you might want to force the first entry in the combo box to be selected when the form is initialized. You can use the `ListIndex` property to do that. For example:

```
cboSize.ListIndex = 0
```



In this example, the first item is selected.

Combo boxes number their list items beginning with 0, not 1.

## *Using List Boxes*

A list box is similar to a combo box, but it doesn't have the same drop-down ability. Instead, a list box displays one or more items from the list, depending on the vertical size of the list box. If not all items fit, a scroll bar appears so that the user can scroll through the list.

In most cases, list boxes are much less useful than combo boxes. However, list boxes have one feature that combo boxes don't have: the ability to let the user select more than one item from the list. For example, Figure 4-6 shows a form with a list box that lets the user select several choices from a long list of pizza toppings.

**Figure 4-6:**  
Adding a  
list box and  
combo box.



To create the effect shown in the list box in Figure 4-6, I set two properties for the list box:

- ◆ `MultiSelect`: Set to `Multi` to allow more than one selection.
- ◆ `ListStyle`: Set to `Option` to display check boxes next to each item in the list.

### *Loading items into a list box*

You load items into a list box just like you load items into a combo box. For example, here's some of the code from the form `Initialize` procedure for the form shown in Figure 4-6:

```
lbToppings.AddItem ("Pepperoni")
lbToppings.AddItem ("Sausage")
lbToppings.AddItem ("Salami")
lbToppings.AddItem ("Linguica")
lbToppings.AddItem ("Pastrami")
lbToppings.AddItem ("Ground Beef")
lbToppings.AddItem ("Chicken")
lbToppings.AddItem ("Canadian Bacon")
```

### *Dealing with multiple selections*

Determining which items are selected in a multiselect list box is tricky. You need to use three properties of the list box to do this:

- ◆ `ListCount`: Indicates the number of items in the list
- ◆ `List(index)`: Retrieves the specified item from the list
- ◆ `Selected(index)`: Indicates whether the specified item was selected

Putting these three properties together, the following `For/Next` loop creates a string variable named `msg` that lists all toppings selected from the `lbToppings` list box:

```
Dim s As String
Dim i As Integer
For i = 0 To lbToppings.ListCount - 1
    If lbToppings.Selected(i) = True Then
        s = s & lbToppings.List(i) & vbCrLf
    End If
Next i
```

The `If` statement determines whether the item for the current index value is selected. If so, the item is appended to the string.



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