Advanced Microsoft Office 2010

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FEATURE CONTENTS

MATH MATTERS

Writing MATTERS

21st Century WORKPLACE

Advanced Word 2010: Business Communications

Unit Objectives:

After completing this Unit, you will understand:

LESSON 1

Advanced Formatting

LESSON 2

Advanced Document Formatting

LESSON 3

Advanced Collaboration

Why It Matters

Every type of business or organization needs to communicate with its employees, its customers, and the public. Documents that are visually appealing and well organized help you to communicate successfully. Microsoft Word is a powerful tool that gives you control over how you present information in a document. It also allows you to share your documents with others. *How could you use Microsoft Word to spread the word about a school event?*

Career ✔ Checklist

There are specific rules for communicating with others via the Internet and e-mail. Always remember to:

✓ Keep your communication professional.

✓ Avoid using slang or casual wording.

✓ Avoid difficult-to-read fonts and emoticons.

✓ Proofread messages before you send them.

✓ Use a Spelling and Grammar Checker.

How Can Communication Skills Advance Your Career?

You may think that most people who use computers at work are involved in computer programming or other more technical computer tasks. The truth is that most people use computers at work for good business communication. People use computers to schedule meetings, keep in touch with customers, and stay connected with coworkers, even across great distances. In today's increasingly global economy, these communication tools are essential to getting jobs done.

Types of Computer Activity at Work

Percent of employees who use a computer for each type of work

Source: Excerpted from http://www.bls.gov/
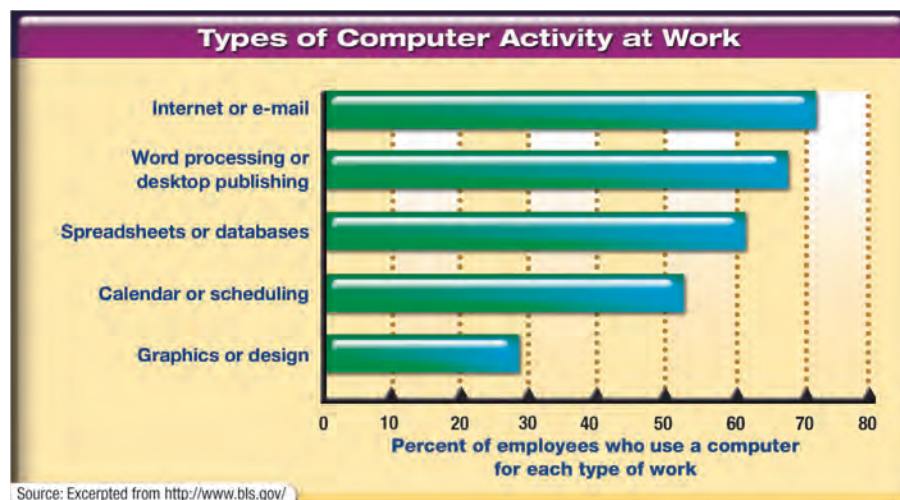
Communicating at Work

Many people use the Internet and e-mail as part of their daily work activities. The Internet is used for research and to get up-to-the-minute news. Employees use e-mail to schedule meetings and track tasks. Many organizations use page layout applications to create newsletters and other communications.

Teamwork and Computer Use

It is certainly true that employers look for workers who can use technology. However, employers also look for employees who can work well with others to produce results. It is essential for employees to use technology to collaborate. The advanced collaboration tools available in programs such as Word help employees use technology to improve teamwork. These tools help employees to better share ideas with each other and to track projects.

✔ **READING CHECK**

❶ **Evaluate** How can each of the categories in the chart help employees work together in a team?

❷ **Math** What percent of employees use word processing or desktop publishing features at work?

You work hard to write the best reports and letters that you can. It is important to consider every word, rewriting, revising, and proofreading until you are satisfied that you have done your best. Now is the time to consider how your work looks. Think about how you can add visual interest to a project with pictures, charts, and tables from outside sources. Consider creating and applying Quick Styles. You can also modify existing elements in your document. An interesting design will help you create a project you can proudly show to anyone.

21st CENTURY SKILLS

Find and Use Information In school and in the workplace, the skills that allow you to find and use information are growing in importance. Information is easily found, but making sure it is relevant, accurate, and credible is a skill that requires practice. You can access information from libraries and on the Internet. Books, magazines, and newspapers provide many different kinds of information. Also, remember that you can get information directly from knowledgeable people, either by writing letters or talking to them. *What is your preferred way to research information?*

Key Concepts

- Create and apply Quick Styles
- Control line and page breaks
- Work with graphics
- Control image contrast and brightness
- Insert and modify new objects and objects from files
- Create and revise charts using data from other sources

Standards

The following standards are covered in this lesson. Refer to pages xxiv and 715 in the Student Edition for a description of the standards listed here.

ISTE Standards Correlation
NETS•S

2b, 2d, 3a, 3b, 3c, 3d, 4b, 4c

Microsoft Office Specialist
Word

1.1, 2.1, 2.5, 2.6, 2.7, 3.1, 3.2, 3.3, 4.1, 4.3, 4.4, 6.1, 6.3, 7.1, 7.2

Royalty-free/Digital Vision/Getty Images

Before You Read

Use Notes When you are reading, keep a notepad handy. Whenever you come upon a section or term that you want to go back to, write down the word or your question and mark the place. After you finish the lesson, go back and look up the terms or try to answer your questions based on what you have read.

Read To Learn

- Communicate convincingly with well-formatted documents and letters.
- Put together professional business reports with advanced formatting features.
- Customize business letters and other documents.

Main Idea

Word includes many advanced formatting features that can make your documents professional and visually pleasing.

Vocabulary

Key Terms

address block	crop	resize
ascending order	descending order	rotate scale
bookmark	graphic	Split Cells
brightness	greeting line	widow
compress	Merge Cells	
contrast	orphan	

Academic Vocabulary

You will find these words in your reading and on your tests. Make sure you know their meanings.

eliminate
specific
utilize

Quick Write Activity

Examine Find an advertisement for a product that you have purchased or would like to purchase. Write a brief description of the advertisement. Note differences in fonts, font sizes, colors, and effects. Note the placement and size of any tables or graphics used in the advertisement. How do these elements support the message of the advertisement?

Study Skills

Organize Your Workstation A messy environment can be distracting. To lessen distractions, organize an area where you can do homework and complete assignments.

Academic Standards

English Language Arts

NCTE 4 Adjust use of language to communicate effectively with a variety of audiences.

NCTE 5 Employ a wide range of strategies while writing to communicate effectively with different audiences.

Math

NCTM Number and Operations Understand numbers, ways of representing numbers, relationships among numbers, and number systems.

NCTM Geometry Analyze characteristics and properties of two- and three-dimensional geometric shapes and develop mathematical arguments about geometric relationships.

1 Choose **Start>All Programs>Microsoft Office®>Microsoft Word 2010**. Open the data file **Paws.docx**. Click **Enable Editing**, if necessary. Save as: Paws-[your first initial and last name]. (For example, *Paws-wlester*.)

2 Choose **Home>Styles> Change Styles** . Click **Style Set** and select **Word 2010** from the list.

3 Select the company name **Pillows 4 Paws**. Choose **Home** and click the **Styles Dialog Box Launcher** . In the **Styles Gallery**, click **New Style** .

4 In the **Create New Style from Formatting** dialog box, under **Properties**, in the **Name** box, key: Paws (see Figure 1.1).

5 In the **Style type** box, select **Paragraph**. In the **Style based on** box, select **Normal**.

6 Change the font to **Arial, 14 pt**. Click **Format**. Choose **Font**. Under **Effects**, select **Small caps**. Click **OK** twice.

7 **CHECK** Your screen should look like Figure 1.2.

➡ *Continue to the next exercise.*

EXERCISE 1-1
Create and Apply Styles for Texts, Lists, and Text Boxes

With Quick Styles, you can change the format of a specific, or particular, type of text, such as a heading, list, caption, or text box. You can create and apply font, size, color, alignment, or other character and paragraph formats. Word documents have a set of predefined, or default, styles that you can edit. You can also create your own custom styles. Once a style has been defined, you can apply the format to your document.

FIGURE 1.1 Create New Style from Formatting dialog box
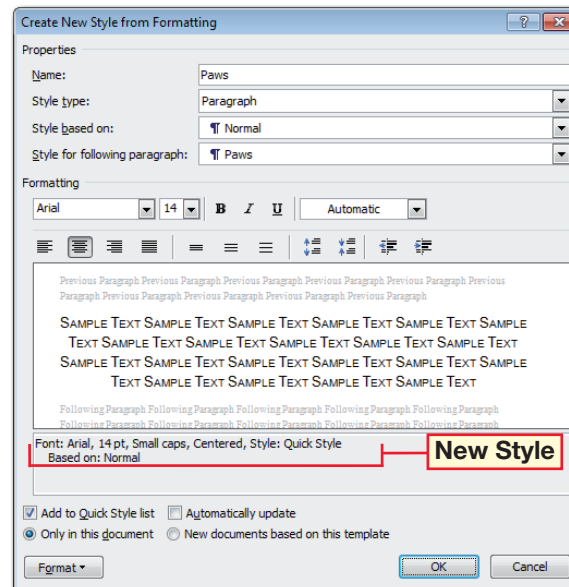
FIGURE 1.2 Style applied to document
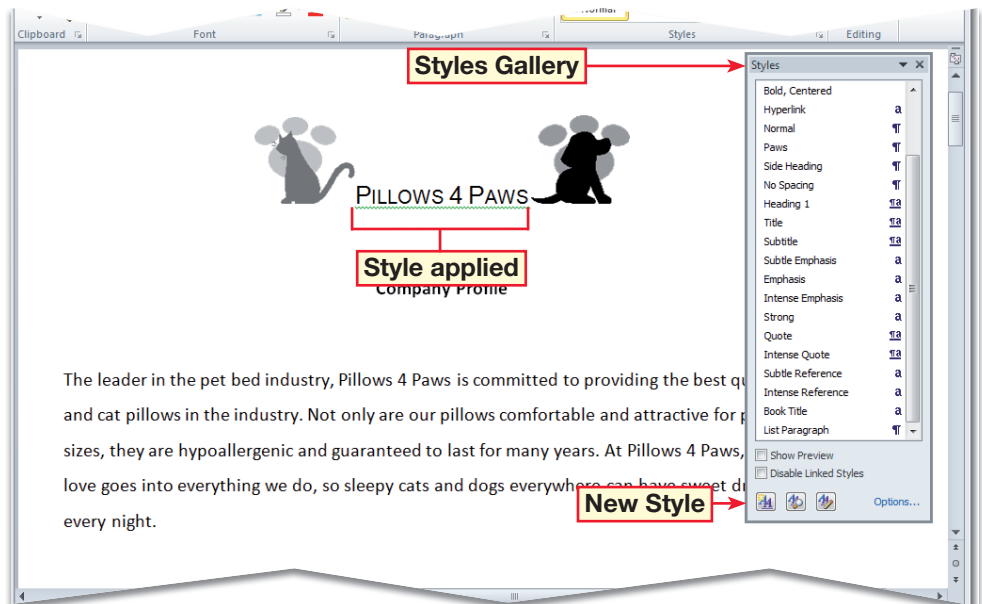
1. In your **Paws** file, locate and click the heading **Our History**. Note the heading style in the **Styles Gallery**.

2. Move the cursor over the style **Side Heading**. Click the drop-down arrow (see Figure 1.3).

3. Choose **Modify**. In the **Modify Style** dialog box, click the **Format** drop-down arrow. Choose **Font**. Select **Small caps**. Click **OK** twice.

4. Go to Page 3. Click before **Add to your existing income**. Key: 1. Press [SPACE]. By default, Word automatically formats the text for a list. Click **Undo** twice.

5. Select the four lines beginning with **Add to your** and ending with **Be your own boss**. Click **New Style**.

6. In the **Name** box, key: Listing. In the **Style type** box, choose **List**. In the **Apply formatting to** box, choose **1st level**.

7. Click **Bullets**. Click **Insert Picture**. Click the bullet shown in Figure 1.4. Click **OK** twice.

➡ *Continued on the next page.*

EXERCISE 1-2
Modify Custom Styles for Texts and Lists

You can edit the character and paragraph formatting of styles and save your custom styles in the Styles Gallery. Paragraphs formatted with a particular style are automatically updated when the style is modified. To apply a style to a text box, choose Drawing Tools>Format and use the tools in the Shape Styles group.

FIGURE 1.3 Styles Gallery
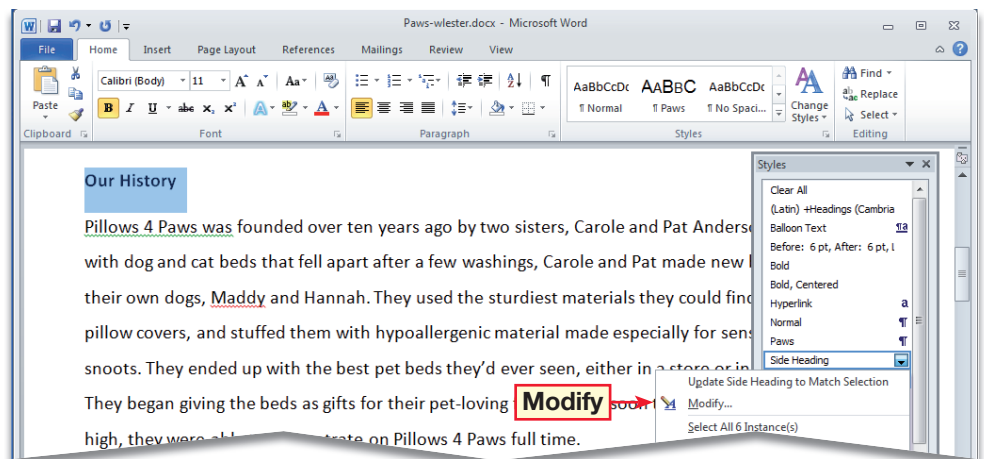
FIGURE 1.4 Picture Bullet dialog box

Select this picture bullet
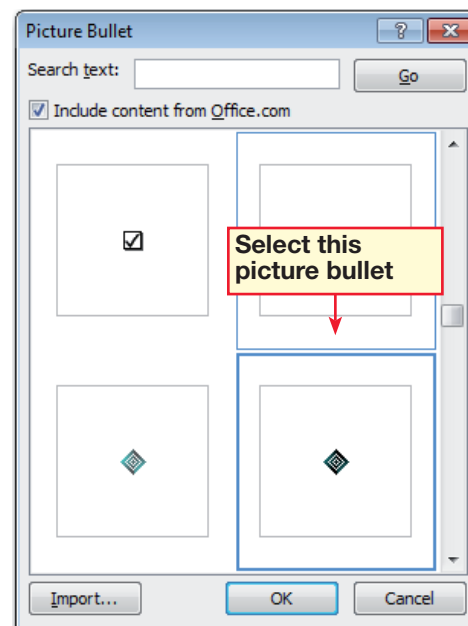
You Should Know

To promote and demote bullet levels, select the bulleted text, click the **Bullets** drop-down arrow and select **Change List Level**.

8 Close the **Styles Gallery**. Scroll to the top of the document. Select the **T** in **The** at the beginning of the first paragraph.

9 Choose **Insert>Text> Drop Cap** 📇. Select **Dropped**. With the **T** still selected, right-click and change the font to **Cambria**.

10 ⓘ**CHECK** Your screen should look like Figure 1.5.

11 Scroll to the second paragraph on the third page. Under the heading **Join Pillows 4 Paws**, click before the fourth sentence in the paragraph.

12 Press ⌷ENTER. Click before the sentence beginning with **You'll have fun**. Press ⌷ENTER.

13 Select the sentence beginning with **When you become**. Choose **Home> Styles** and click the **Styles Dialog Box Launcher** 📐.

14 Select **Intense Quote**. Close the **Styles Gallery**. Deselect the text.

15 ⓘ**CHECK** Your screen should look like Figure 1.6 Save and close your file.

➡ *Continue to the next exercise.*

EXERCISE 1-2 (Continued)
Modify Custom Styles for Texts and Lists

FIGURE 1.5 Drop cap applied to text
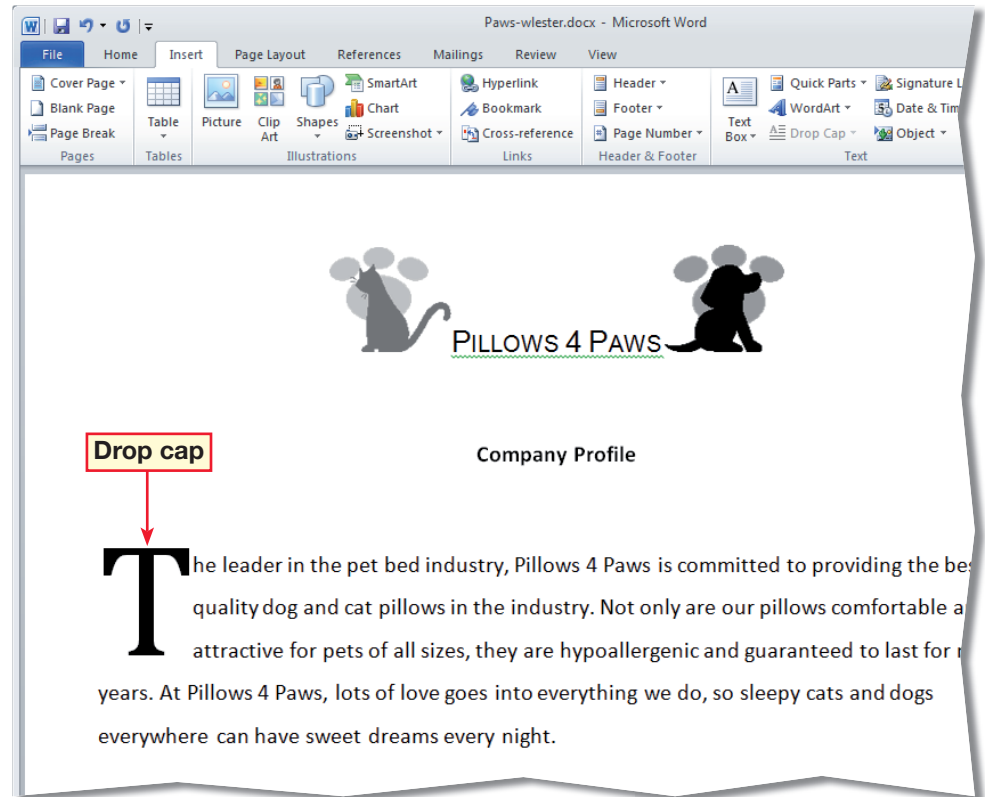
FIGURE 1.6 Intense quote applied to text

EXERCISE 1-3
Create Custom Styles for Tables

You can **utilize**, or use, the Styles Gallery to quickly change the formatting of tables in your Word documents. You can also edit the format of a table, such as making the font bigger or adding shading to a row, and then save the table style to the Quick Styles Gallery to use as the default style for new tables you create.

FIGURE 1.7 Create New Style from Formatting dialog box for table
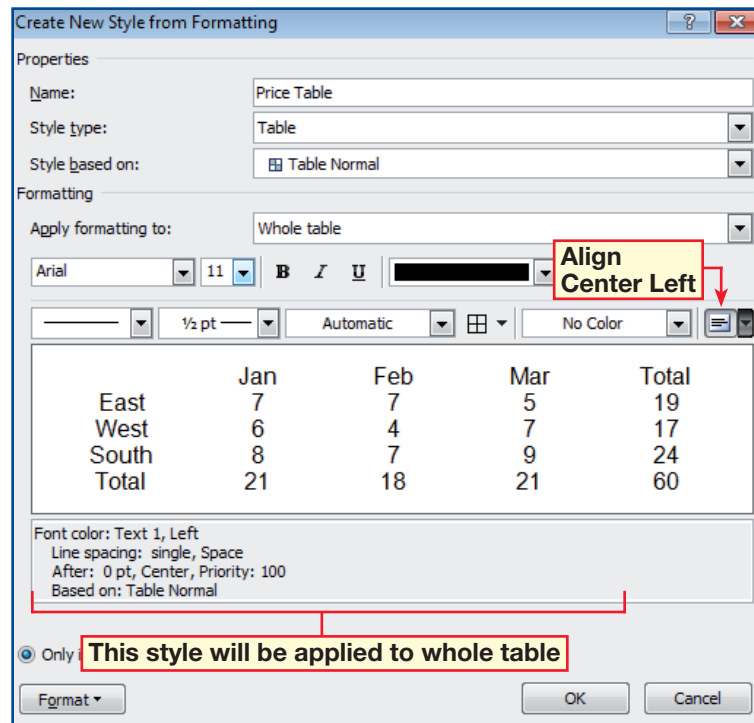
FIGURE 1.8 Create New Style from Formatting dialog box for header row only

1. Open the data file **Pricing.docx**. Save as: Pricing-[your first initial and last name].

2. Choose **Home>Styles** and click the **Styles Dialog Box Launcher** . In the task pane, click **New Style** .

3. In the **Name** box, key: Price Table. In the **Style type** box, select **Table**.

4. In the **Style based on** box, select **Table Normal**.

5. In the **Apply formatting to** box, select **Whole table**.

6. In the drop-down list of the **Formatting** section, select **Arial**, **11 pt**, and the font color **Black**. Click the **Alignment** drop-down arrow. Select **Align Center Left** (see Figure 1.7).

7. In the **Apply formatting to** box, select **Header row**.

8. Click **Format**. Choose **Font**. Change the font to **Arial**, **12 pt**, **Bold**, **Black**, and **Small caps**. Click **OK**.

9. **CHECK** Your dialog box should look like Figure 1.8. Click **OK**.

Continued on the next page.

EXERCISE 1-3 (Continued)
Create Custom Styles for Tables

10 Click in the table. Choose **Home>Styles>More** ▼.

11 Select **Apply Styles**. Select **Price Table** under **Style Name** and click **Modify**.

12 **✚CHECK** Your dialog box should look like Figure 1.9. Set the **Apply formatting to:** box to **Whole table**.

13 Click **Format**. Choose **Paragraph**. On the **Indents and Spacing** tab, change the **Spacing After** to **3 pt**. Click **OK**. Click **Format**. Choose **Borders and Shading**. Under **Setting**, click **All**.

14 In the **Width** box, choose **1 pt**. Click **OK** twice. Close the menu and pane.

➡ *Continued on the next page.*

FIGURE 1.9 Modify Style dialog box

Microsoft Office 2010

To remove a **Quick Style** from the gallery, right-click the style in the **Styles** task pane, and click **Remove from Quick Style Gallery**.

EXERCISE 1-3 (Continued)
Create Custom Styles for Tables
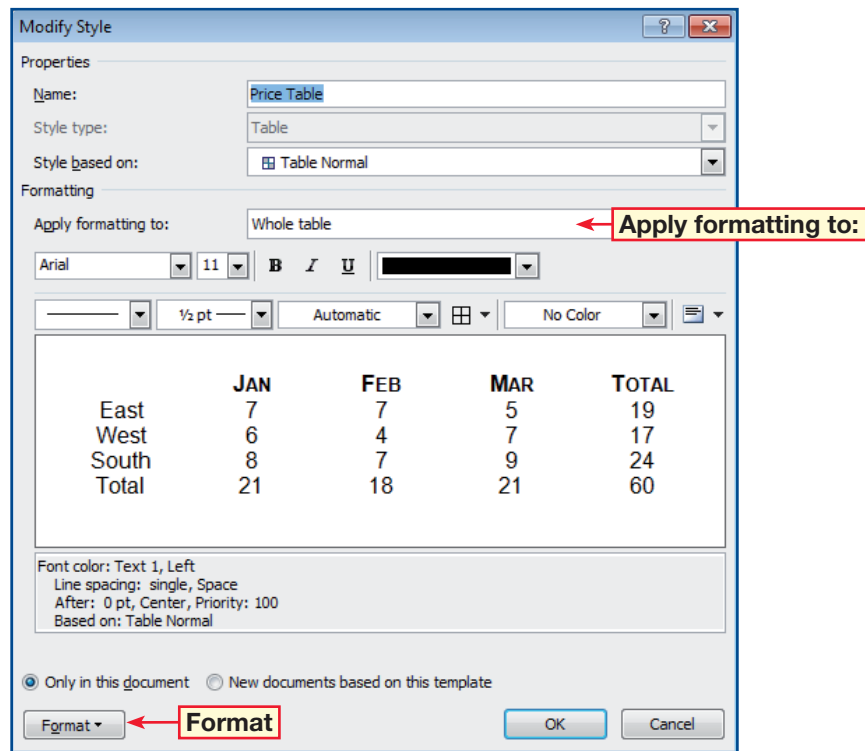
15. Select the entire table. Choose **Insert>Tables>Table** and select **Quick Tables**. Click **Save Selection to Quick Tables Gallery**. Name the format: Price Table.

16. Set the **Gallery** to **Tables**. Set **Options** to **Insert content in its own paragraph**. Click **OK**.

17. With your table still selected, right-click and select **Delete Table**. Choose **Insert>Tables>Table>Quick Tables**. Scroll down and click **Price Table**.

18. ⓘ**CHECK** Your screen should look like Figure 1.10. Save and close your file.

➥ *Continue to the next exercise.*

FIGURE 1.10 Quick Table inserted

PET WEIGHT	PILLOW STYLE	PATTERN	COLOR	PRICE
Under 10 lb.	Fritzi	Polka dot	Pink/Gray	$24.95
11-20 lb.	Milo	Paisley	Blue/Green	$29.95
21-30 lb.	Sheba	Stripes	Red/Navy	$34.95
31-40 lb.	Buster	Plaid	Yellow/Orange	$39.95
41-50 lb.	Grendel	Stars	Purple/Lavender	$44.95
Over 50 lb.	Rex	Solid	Tan	$50.95

Price table Quick Table inserted
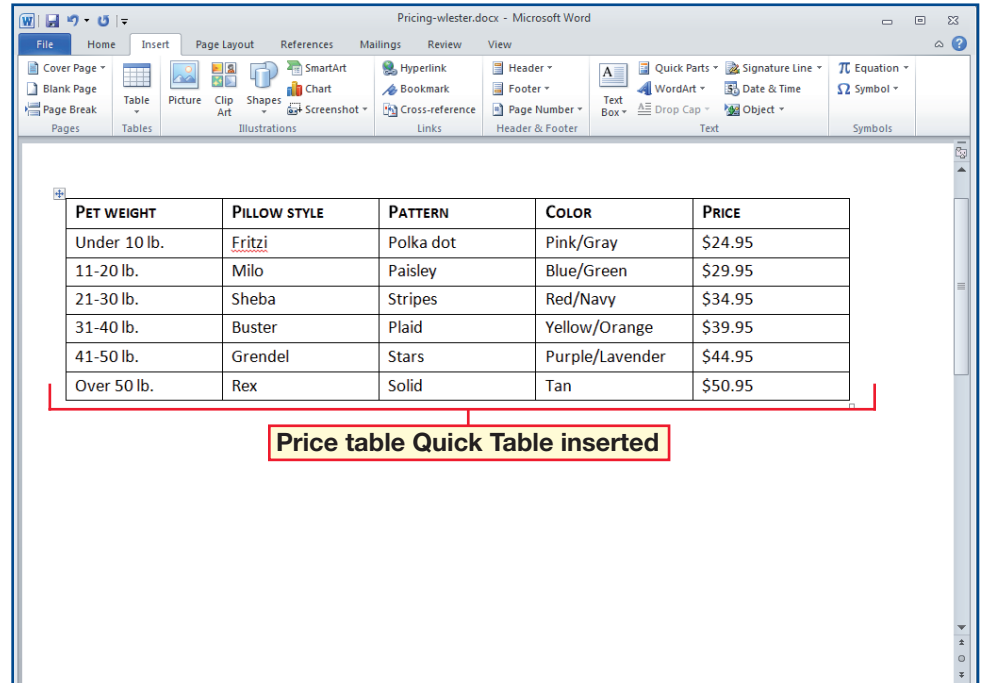
1. Open your **Paws** file. On Page 1, click the paragraph starting with **Today**.

2. Click the **Paragraph Dialog Box Launcher** 🔲. Click the **Line and Page Breaks** tab.

3. Click the **Widow/Orphan control** box. Click **OK**. Scroll to the paragraph end.

4. ⓘ**CHECK** Your screen should look like Figure 1.11.

5. Click the **Today** paragraph. Launch the **Paragraph** dialog box. Click **Keep lines together**. Click **OK**. The paragraph is on Page 2.

6. Click the heading **Our Product**. Launch the **Paragraph** dialog box. Select **Keep with next**. Click **OK**. The heading moves to Page 2.

7. Click after **house!"** at the end of the first customer testimonial. Activate **Show/Hide** ¶ . Press SHIFT + ENTER . Key: Renaldo R.

8. Click after **cute."** Press SHIFT + ENTER . Key: Maria V. Click after **it!"** Press SHIFT + ENTER . Key: Choo-Hee K.

9. ⓘ**CHECK** Your screen should look like Figure 1.12. Turn **Show/Hide** ¶ off. Save your file.

➡ *Continue to the next exercise.*

EXERCISE 1-4
Control Line and Page Breaks

You can format your document so that single lines of text will not appear at the top or bottom of a page. An orphan is a line of text that appears by itself at the bottom of a page. A widow is a line of text that appears by itself at the top of a page. You can also apply the Keep lines together feature to avoid a page break that splits a paragraph in the middle. Keep with next prevents a page break in between two paragraphs that you want to keep on the same page.

FIGURE 1.11 Paragraph with widow control

One line of text moves down to join the widow line
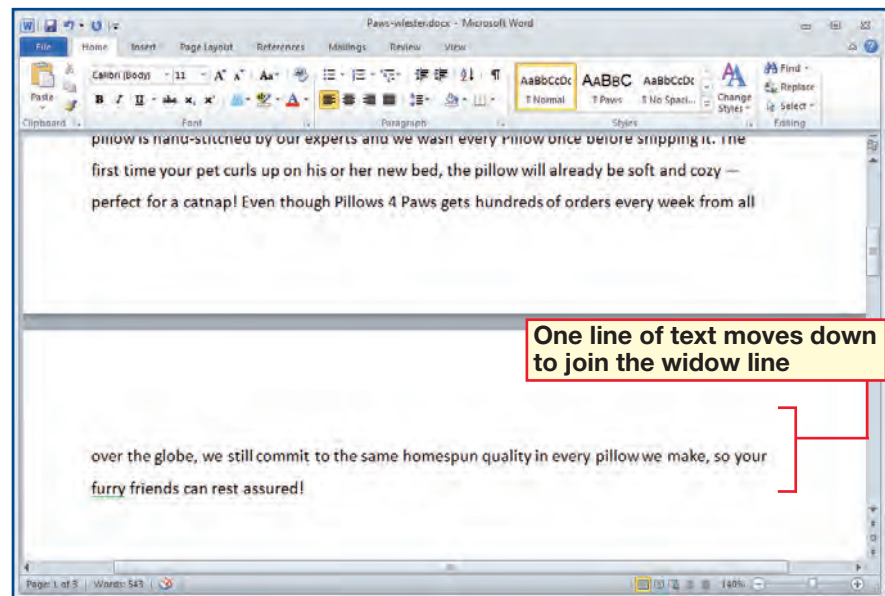
FIGURE 1.12 Displaying line breaks

Show/Hide

Line break

Line break

Control Word and Section Breaks
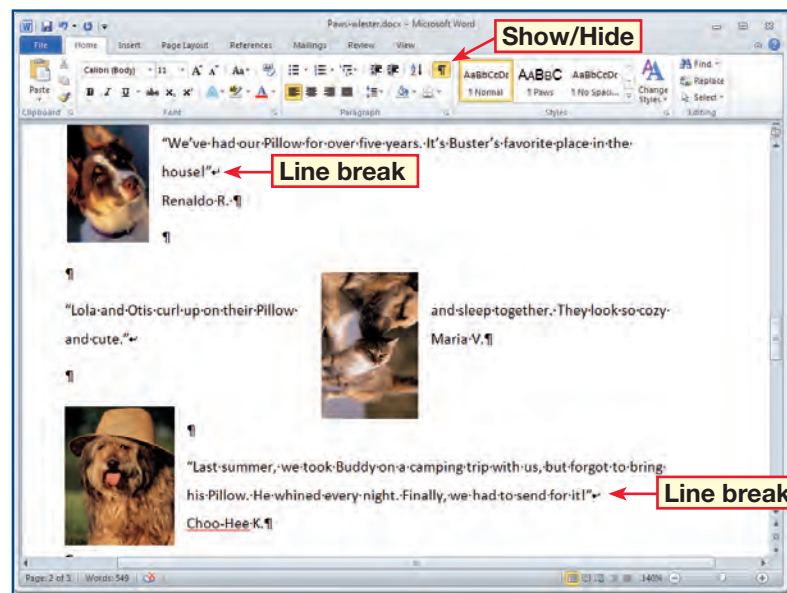
1. In your **Paws** file, click before **Our History**.

2. Choose **Page Layout> Page Setup>Breaks** and select **Continuous**. Select all the text (including header) under **Our History**. Choose **Page Setup> Columns>Two**.

3. **CHECK** Your screen should look like Figure 1.13.

4. Click **Breaks** and select **Odd Page**. The new section starts on the next odd-numbered page. Click **Undo**.

5. On Page 2, click before **Our Product**. Click **Breaks** and select **Even Page**. The section moves to the next even-numbered page. Click **Undo**.

➡ *Continued on the next page.*

When you get to the end of a line of text, Microsoft Word automatically wraps the text, or moves it to the next line. Sometimes you may not want a line to break at a specific spot. For example, you may want two adjacent words, such as a company name, to appear next to each other on the same line. You can insert a non-breaking space so that the words appear on the same line. You can also apply section breaks to change the layout or formatting of a page in your document. For example, you may want a layout that uses a different number of columns on a page.

FIGURE 1.13 Page layout displaying continuous section break
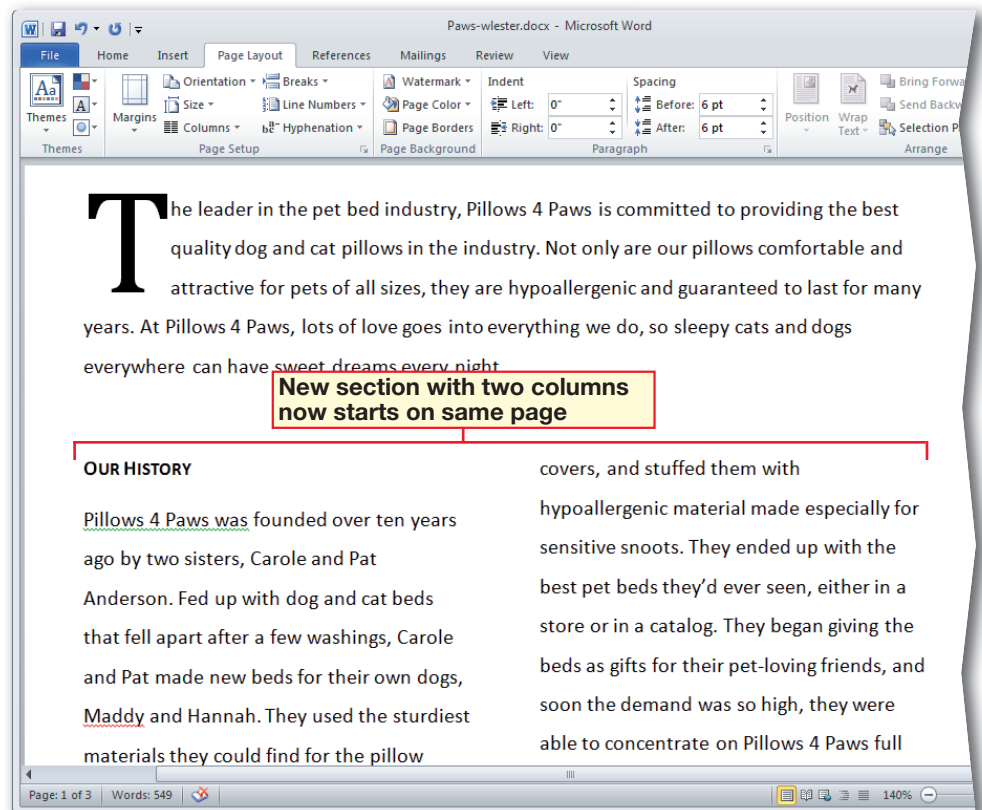
6 Go to the columns on Page 1. Choose **Page Setup>Hyphenation>Automatic**. The lines break between syllables and the document has more uniform spacing.

7 In the first column, select the space between **Pat** and **Anderson** (in line 2). Press CTRL + SHIFT + SPACE.

8 **✪CHECK** Your screen should look like Figure 1.14.

9 Click **Hyphenation**. Select **None.** Select both columns. Choose **Columns>One**. Save your file.

➡ *Continue to the next exercise.*

EXERCISE 1-5 (Continued)
Control Word and Section Breaks

FIGURE 1.14 Non-breaking space added
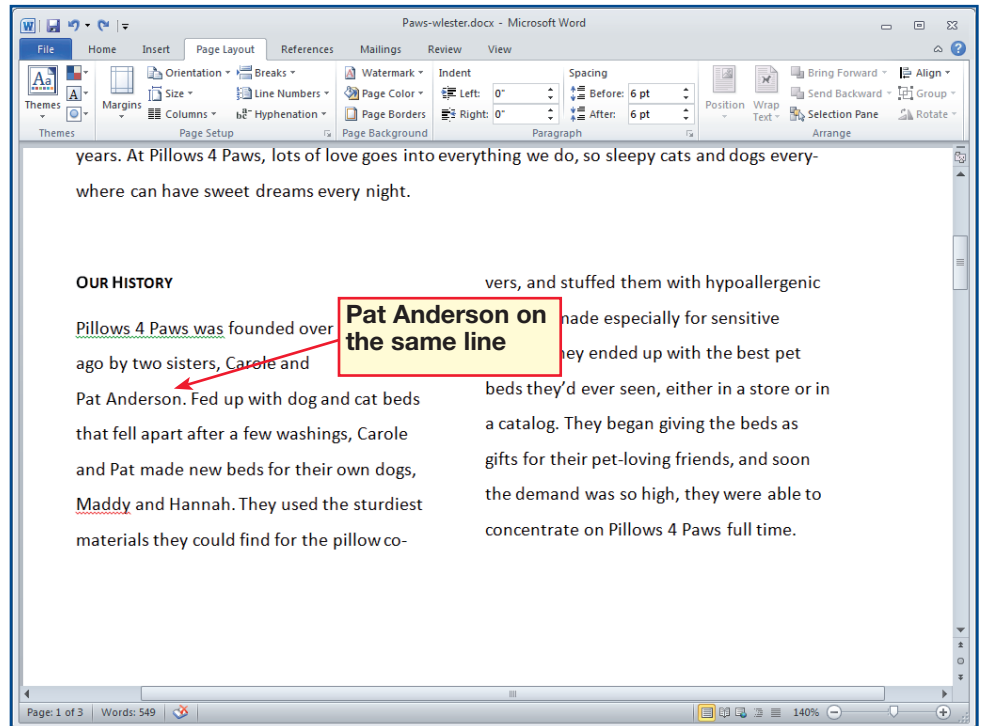
1. In your **Paws** file, click on the dog graphic in the first customer testimonial on Page 2.

2. The **Picture Tools** contextual tab appears. Choose **Format>Size**. Click the **Size Dialog Box Launcher** 🔲.

3. On the **Size** tab, under **Height**, change **Absolute** to **1.14"**.

4. Under **Scale**, verify that the **Lock aspect ratio** and **Relative to original picture size** boxes are checked.

5. **ⓘCHECK** Your dialog box should look like Figure 1.15. Click **OK**.

6. **ⓘCHECK** Your screen should look like Figure 1.16.

➡ *Continued on the next page.*

Academic Skills

If a graphic is twice as wide as it is tall, it can be sized so that it still maintains its original proportions. To size a graphic proportionally, drag a corner handle. Dragging a middle handle sizes graphics vertically or horizontally.

EXERCISE 1-6
Resize and Scale Graphics

A **graphic** is usually a picture file, but tables, charts, screenshots, and shapes are also graphics. You can change the size of a graphic or you can scale a graphic to be a percentage of its original size. One way to change the size of or **resize** a graphic is by entering a measurement in the Layout dialog box. Another way you can size a graphic is by dragging a sizing handle. To **scale** a graphic, click the Size group's Dialog Box Launcher and key a percentage for the height or width in the Scale section.

FIGURE 1.15 Layout dialog box
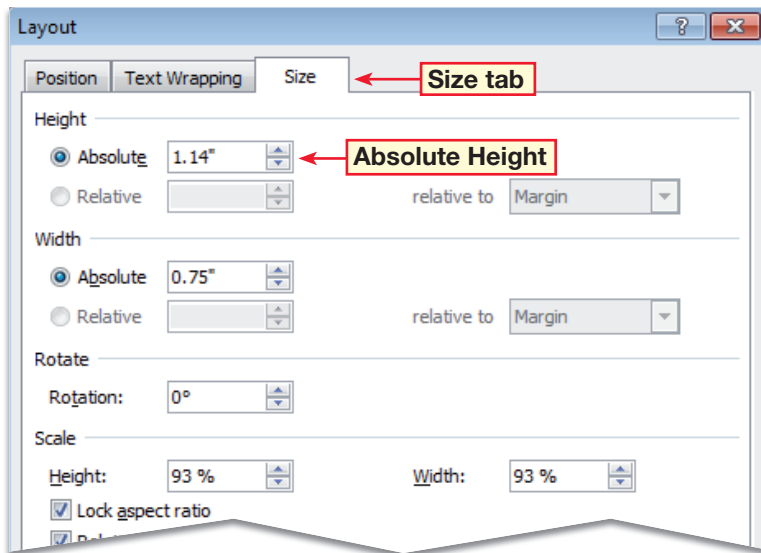
FIGURE 1.16 Resized graphic
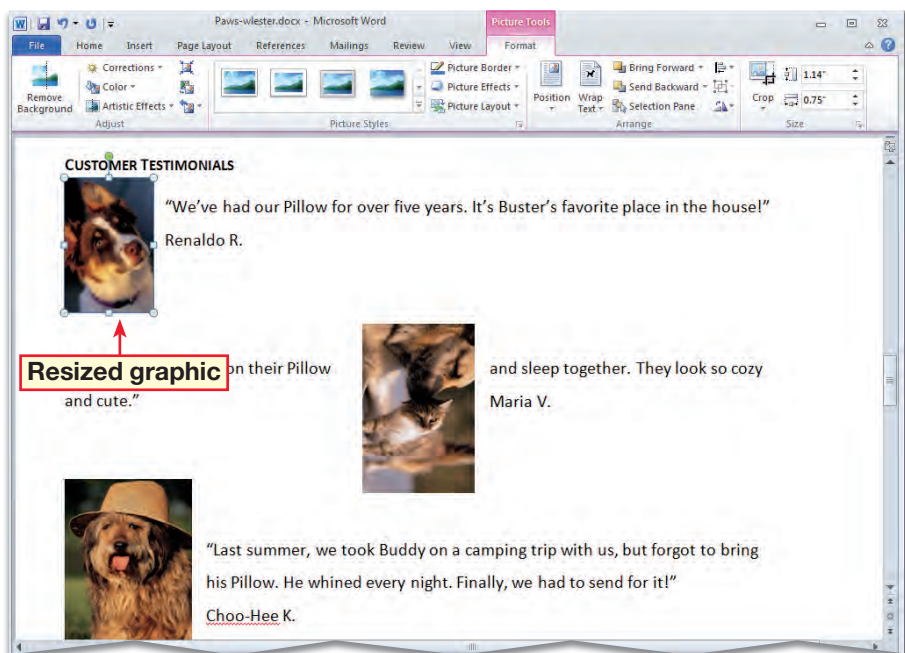
7 Click the dog photo in the third customer testimonial.

8 Click the **Size Dialog Box Launcher** . On the **Size** tab, under **Height,** key: 1.15″. Press TAB . The width and scale are adjusted automatically.

9 In the dialog box, under **Scale**, change **Height** to **50%**. Press TAB . The width and height are automatically scaled. Click **OK**.

10 ⓘ**CHECK** Your screen should look like Figure 1.17.

11 Click **Undo** on the **QAT**.

12 ⓘ**CHECK** Your screen should look like Figure 1.18.

13 Save your file.

➡ *Continue to the next exercise.*

Tech Tip

You can find the original height and width of a graphic easily on the **Size** tab in the **Layout** dialog box under **Original size**.

EXERCISE 1-6 (Continued)
Resize and Scale Graphics

FIGURE 1.17 Third graphic scaled and resized
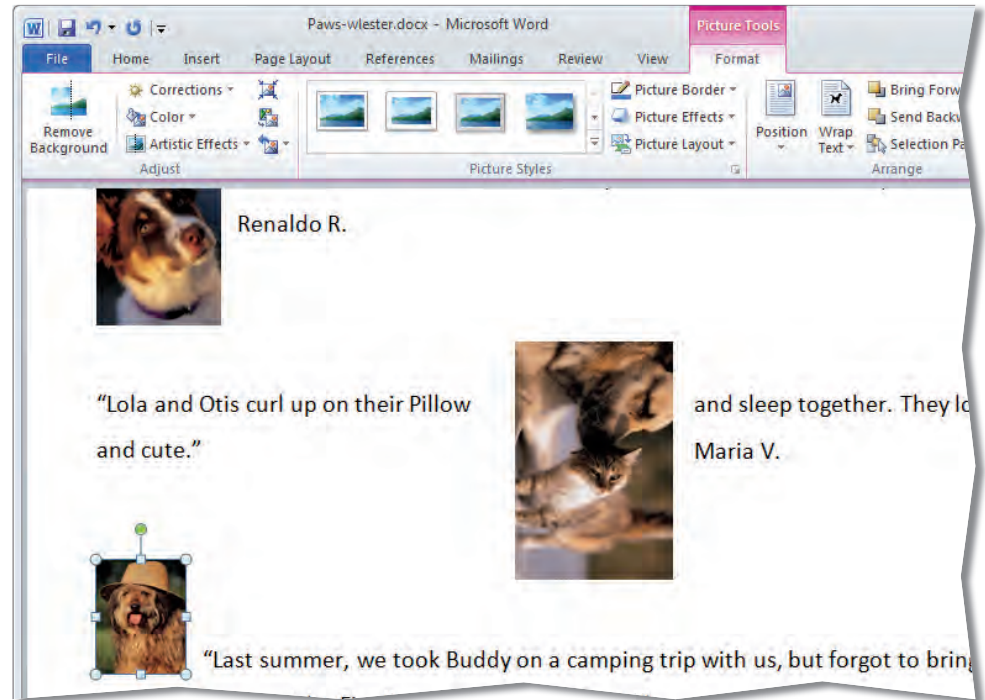
FIGURE 1.18 Third graphic returned to original size and scale
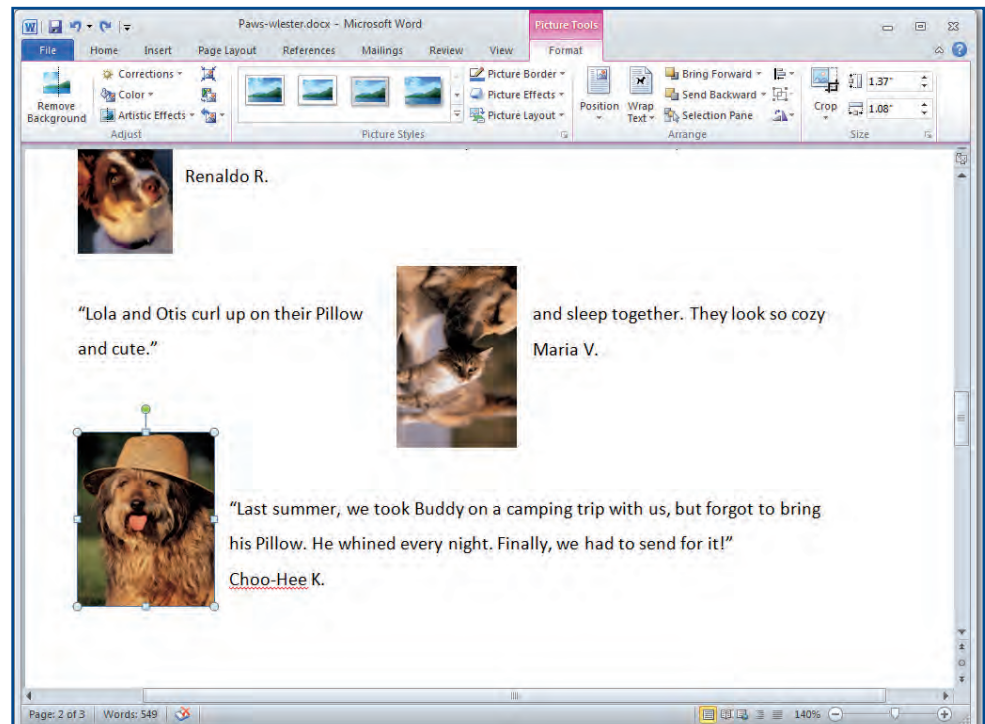
① In your **Paws** file, click once on the dog and cat graphic in the second customer testimonial.

② Choose **Format> Arrange>Position** 📄. Select **More Layout Options**.

③ Click the **Text Wrapping** tab. Click **Tight**.

④ Click the **Position** tab. Under **Horizontal**, change the **Alignment** to **Right**.

⑤ **i CHECK** Your dialog box should look like Figure 1.19.

⑥ Click **OK**.

⑦ **i CHECK** Your screen should look like Figure 1.20.

⑧ Save your file.

➡ *Continue to the next exercise.*

You Should Know

Pictures are inserted as inline graphics. To move a picture freely on the page, the picture must be changed to a floating graphic. To change an inline graphic, apply text wrapping to the selected graphic.

EXERCISE 1-7
Wrap Text with Graphics

After you insert a graphic, you can flow, or wrap, text around it to **eliminate**, or remove, unnecessary white space. You may wrap text around a graphic to make your document more attractive or to save space.

FIGURE 1.19 Position tab in Layout dialog box
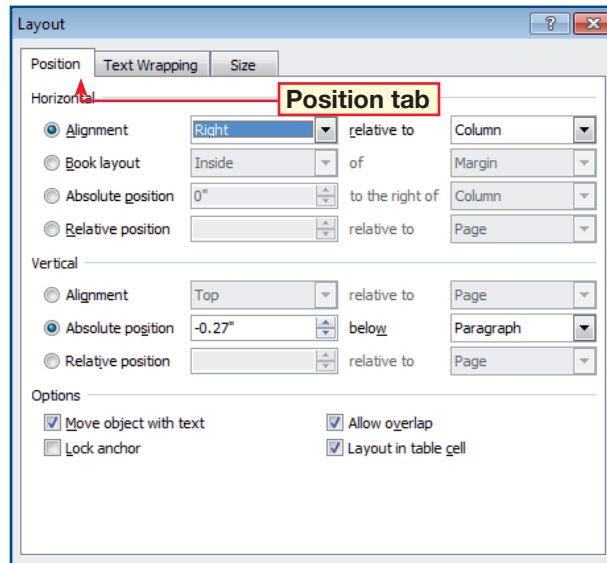
FIGURE 1.20 Text wrapping around graphic
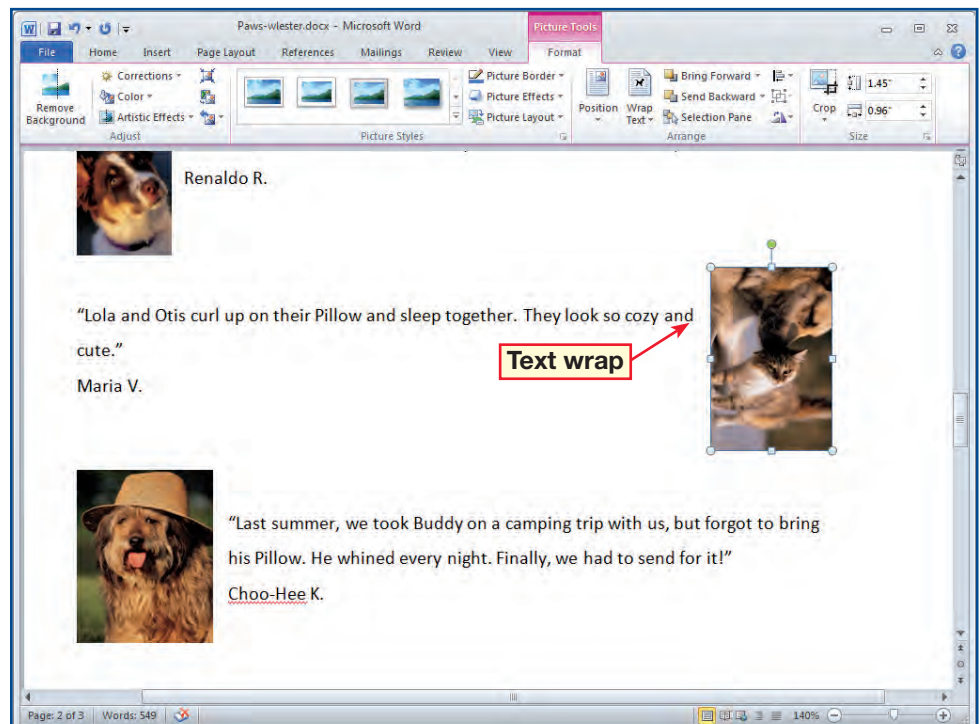
1 In your **Paws** file, select the dog and cat graphic next to the second customer testimonial.

2 Choose **Format> Arrange>Rotate** 🔳. Select **Rotate Left 90°** (see Figure 1.21).

3 With the graphic still selected, choose **Format> Size>Crop** 🔳. Crop the extra space next to the cat's tail by dragging the middle cropping handle on the right toward the center of the graphic.

4 Choose **Format>Adjust> Compress Pictures** 🔳.

5 Read the **Compression options**. Select **Apply only to this picture**. Click **OK**.

6 Hold down CTRL and select all three images. Choose **Format>Picture Styles>More** 🔻. Select **Bevel Rectangle**.

7 Deselect the images. Click the first image. Click **Artistic Effects**. Select **Film Grain**. Repeat this step for the other pictures.

8 🛈**CHECK** Your screen should look like Figure 1.22. Save your file.

➡ *Continue to the next exercise.*

EXERCISE 1-8
Rotate, Crop, and Format Graphics

You may want to modify a graphic once you have inserted it. You can also **rotate** a graphic to change its position on the page, **crop** a graphic to trim its edges, or modify its actual shape. You can use a Quick Style to add borders or bevels. You can also use the Picture Tools to add artistic effects to make it look more like a picture or drawing, or remove the background. After you make the changes to your picture, you may want to reduce the image resolution, or **compress** the picture to reduce the document's overall file size.

FIGURE 1.21 Rotating a graphic
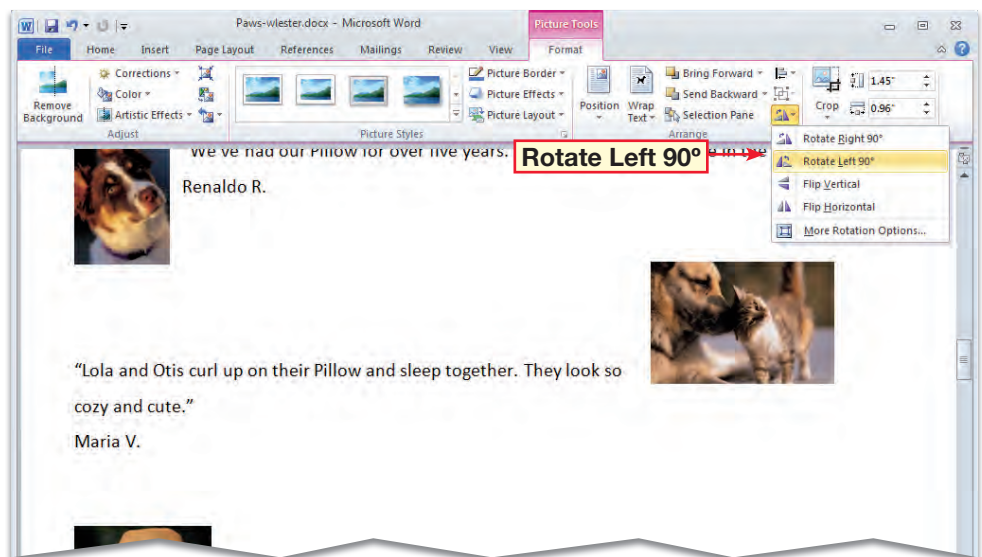
FIGURE 1.22 Beveled graphics with artistic effects applied
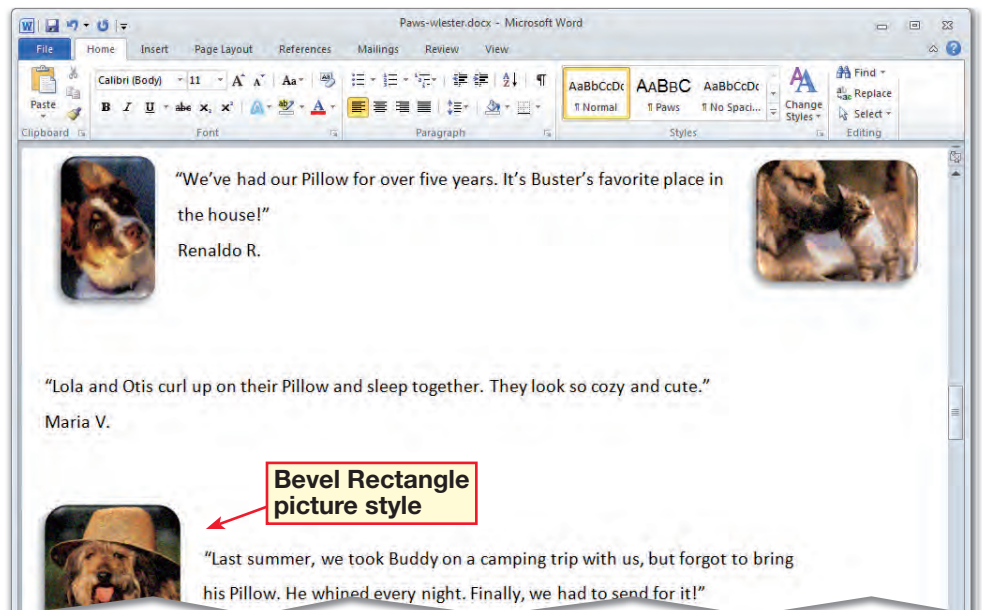
1 In your **Paws** file, select the cat graphic next to the company name at the top of the first page. The **Picture Tools** contextual tab becomes visible.

2 Choose **Format>Adjust> Corrections**. Under **Brightness and Contrast**, select **Brightness: +40% Contrast: 0% (Normal)**.

3 ⓘ**CHECK** Your screen should look like Figure 1.23.

4 With the cat graphic still selected, choose **Format> Adjust>Color**. Under **Recolor**, select **Blue, Accent color 1 Dark**.

5 Click **Reset Picture.** Click **Color** and select **Blue, Accent color 1 Light**.

6 Select the dog graphic to the right of the company name. Choose **Format> Adjust>Color**. Under **Recolor**, select **Red, Accent color 2 Light**. Deselect the graphic.

7 ⓘ**CHECK** Your screen should look like Figure 1.24.

8 Save and close your file.

➡ *Continue to the next exercise.*

EXERCISE 1-9
Control Color, Contrast, and Brightness

You can adjust a graphic's <mark>contrast</mark> to make it clearer or sharper. You can also adjust <mark>brightness</mark> to make the graphic lighter or darker, or recolor a graphic to give it a stylized effect, such as grayscale or sepia tone. If you decide that you want to use a different picture, you can quickly and easily switch to another graphic, while preserving the formatting and size of the current picture, by selecting Format>Adjust>Change Picture.

FIGURE 1.23 Controlling image brightness and contrast
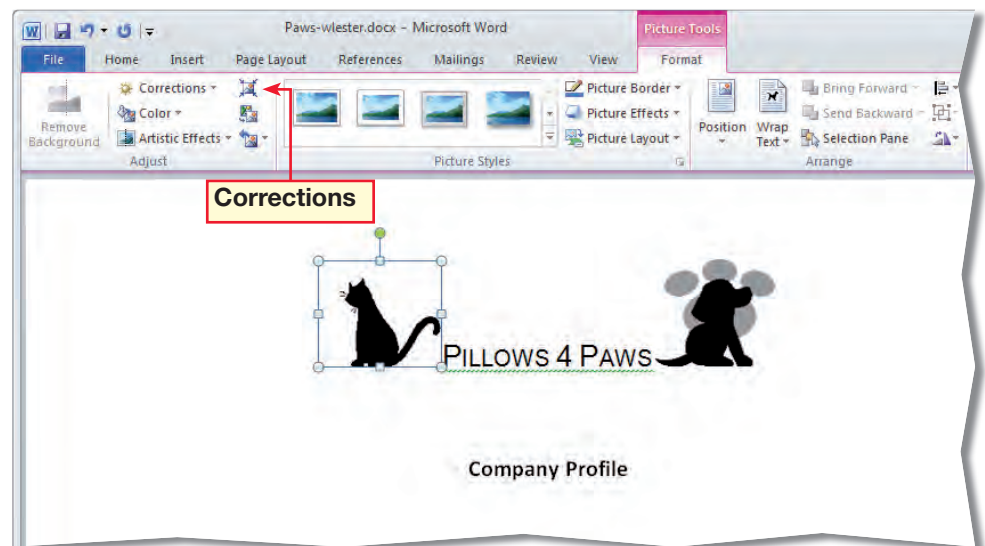
FIGURE 1.24 Recoloring graphics
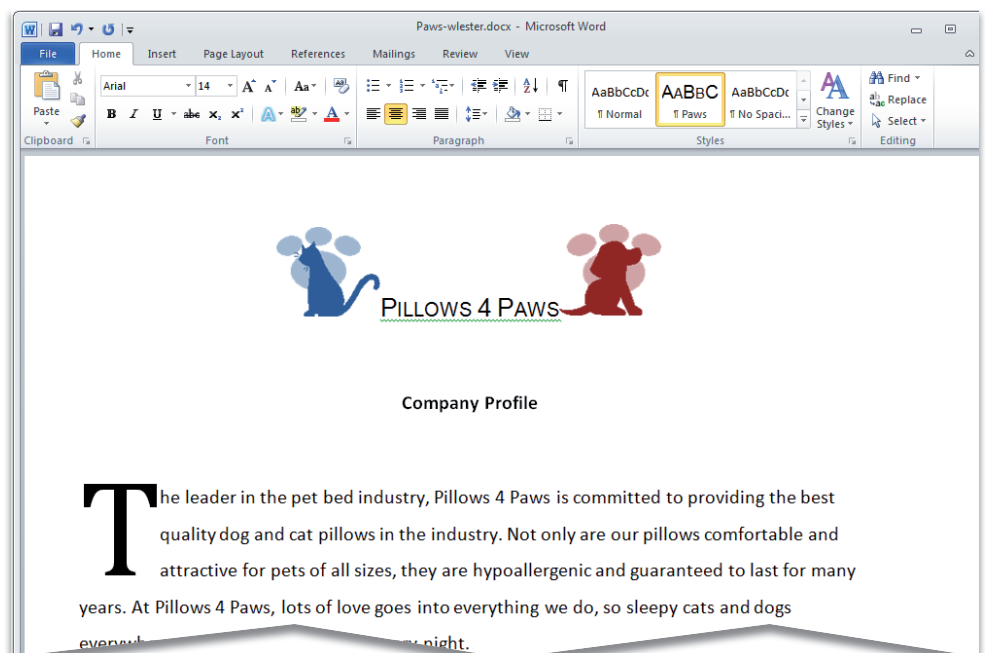
1 In your **Paws** file, click after the word **too!** on Page 3. Press `ENTER`.

2 Choose **Insert>Text**. Click the **Object** drop-down arrow. Click **Text from File** (see Figure 1.25).

3 Navigate to your saved **Pricing** file. Select the file. Click **Insert**.

4 **CHECK** Your screen should look like Figure 1.26.

5 Click before the sentence that begins **See below for**. Choose **Page Layout>Page Setup> Breaks** .

6 Choose **Page**. The sentence is now at the top of the fourth page.

7 Click after **country.** at the end of the sentence that begins **See below for**. Press `ENTER`. Choose **Insert>Text>Object** .

8 Click the **Create New** tab. Click **Microsoft Excel Chart**. Click **OK**.

9 On the inserted chart, click the **Sheet1** tab. Select rows **4** through **7**. Choose **Home>Cells>Delete** .

Continued on the next page.

EXERCISE 1-10
Insert and Modify Objects

You may need to create or revise a table or chart in Word using information from another source, such as data from a graph, chart, PowerPoint slide, Excel worksheet, or other object. An object is a table, chart, graphic, equation, or other form of information that you insert into your document. You can also open these Excel, PowerPoint, or Access files while working in Word and cut and paste data from the source into your document. In Word 2010, you can also take and insert a screenshot, or picture, of all or part of the windows open on your computer by choosing Insert> Illustrations>Screenshot.

FIGURE 1.25 Text from File
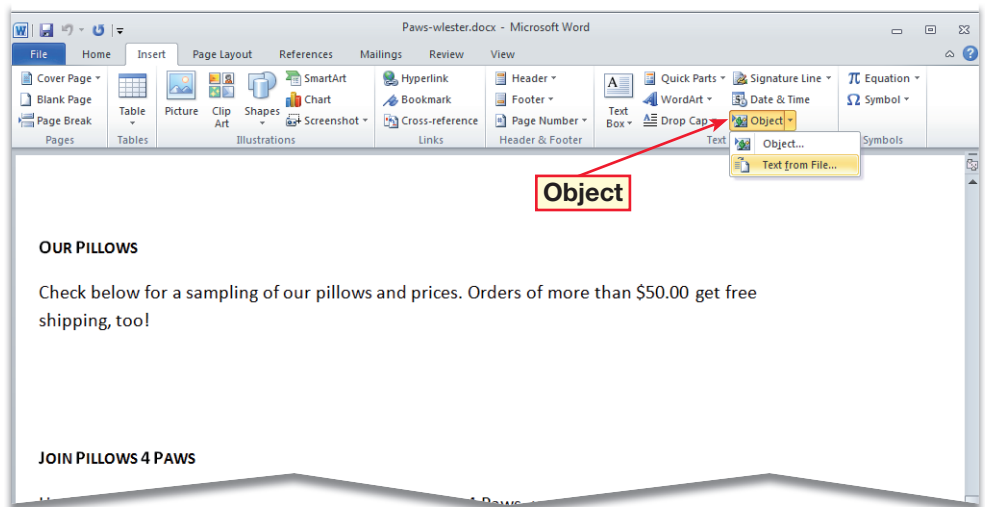
FIGURE 1.26 New object inserted in document

PET WEIGHT	PILLOW STYLE	PATTERN	COLOR	PRICE
Under 10 lb.	Fritzi	Polka dot	Pink/Gray	$24.95
11-20 lb.	Milo	Paisley	Blue/Green	$29.95
21-30 lb.	Sheba	Stripes	Red/Navy	$34.95
31-40 lb.	Buster	Plaid	Yellow/Orange	$39.95
41-50 lb.	Grendel	Stars	Purple/Lavender	$44.95
Over 50 lb.	Rex	Solid	Tan	$50.95

Table object inserted

EXERCISE 1-10 (Continued)
Insert and Modify Objects
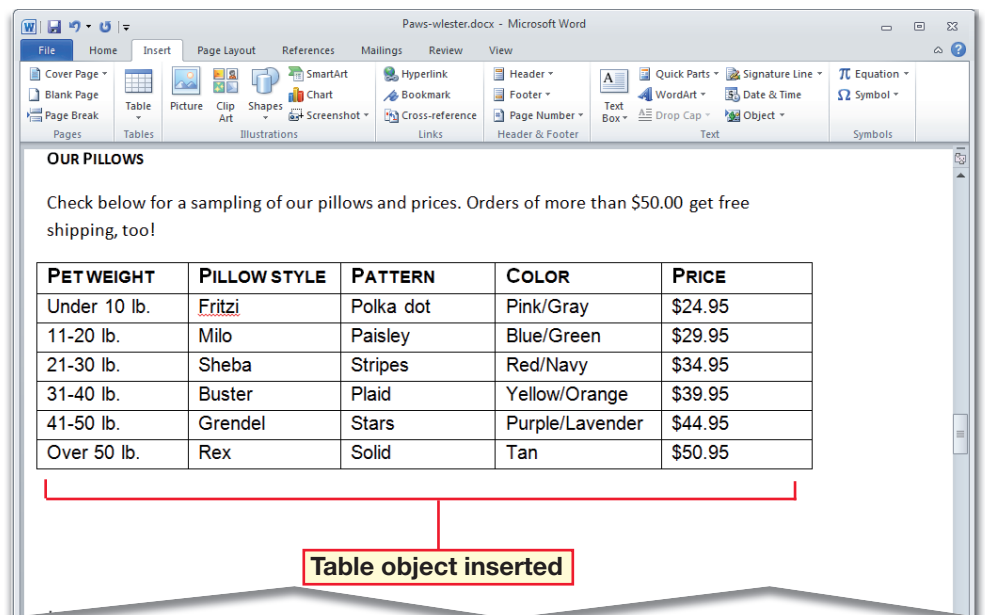
10 Open the datafile **Sales.xlsx**. Select **A2:D4**. Choose **Home> Clipboard>Copy** 📋 (see Figure 1.27).

11 In the datasheet for the inserted chart, select **A1:D3**. Press [CTRL] + [V].

12 Click cell **C2**. Delete **$75.00**. Key: **$100.00**. Press [ENTER].

13 Click the **Chart1** tab. Choose **Chart Tools> Design>Switch Row/ Column**.

14 ⓘ**CHECK** Your screen should look like Figure 1.28.

15 Close the **Sales.xlsx** file. Exit **Excel**. Save and close your **Paws** file.

➡ *Continue to the next exercise.*

FIGURE 1.27 Excel spreadsheet data

Copy selected cells A2:D4

FIGURE 1.28 Revised chart

See below for the average sales of a Pillow Party in different regions of the country.

Academic Skills

Accurate data is especially important when creating reports. Inserting objects can help you to ensure that you have the most up-to-date data in a report.
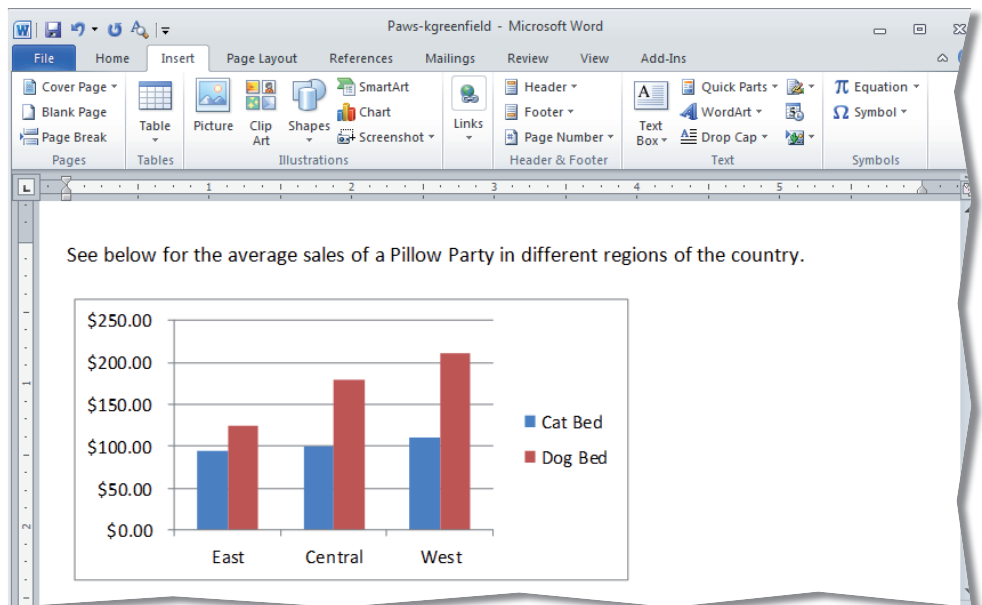
You Should Know

You can also take a screenshot or screen clipping of data within Excel, Outlook, and PowerPoint and then insert it into a Word document.

1 Open the data file **Northmeadow.docx**. Save as: Northmeadow-[your first initial and last name].

2 On Page 3, under **Important Upcoming Meetings**, select the list of four meetings.

3 Choose **Home> Paragraph>Sort** ![sort icon]. In the **Sort Text** dialog box, click **Options**. Under **Separate fields at**, click **Other**. Clear the box. Press SPACE. Click **OK**.

4 Under **Sort by**, select **Paragraphs** (see Figure 1.29). Under **Type**, select **Text**. Click **Ascending**. Click **OK**. The list is now sorted by meeting name in alphabetical order.

5 With the list still selected, click **Sort** ![sort icon]. Under **Sort by**, select **Word 5**. Under **Type**, select **Date**. Click **Ascending**. Click **OK**. Deselect the text.

6 ![CHECK] Your screen should look like Figure 1.30.

7 Select the list. Choose **Insert>Text>Text Box> Draw Text Box**. Use the **Drawing Tools** to format and apply a text box style.

8 Save your file.

➡ *Continue to the next exercise.*

EXERCISE 1-11
Sort Information in Lists

You can sort, or arrange, information in tables and lists by a specific category. Information that is sorted in ==ascending order== is arranged from A to Z, 0 to 9, or earliest date to latest date. Information that is sorted in ==descending order== goes from Z to A, 9 to 0, or latest date to earliest date.

FIGURE 1.29 Sort Text dialog box
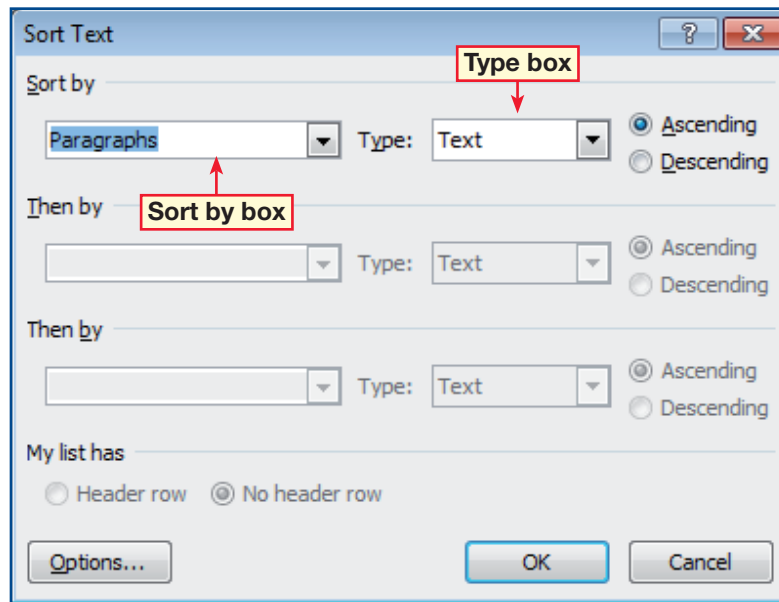
FIGURE 1.30 List sorted in ascending order by date

Important Upcoming Meetings

The following meetings are scheduled over the next three months. Departmen plan on attending all meetings. All employees will be expected to attend the Co Meeting scheduled for May 14, 2012.

Products Overview Meeting – 3/19/12
Services Review Meeting – 3/23/12
Sales Kick-Off Meeting – 4/16/12
Corporate Policies Meeting – 5/14/12

List sorted in ascending order by date

EXERCISE 1-12
Sort Information in Tables
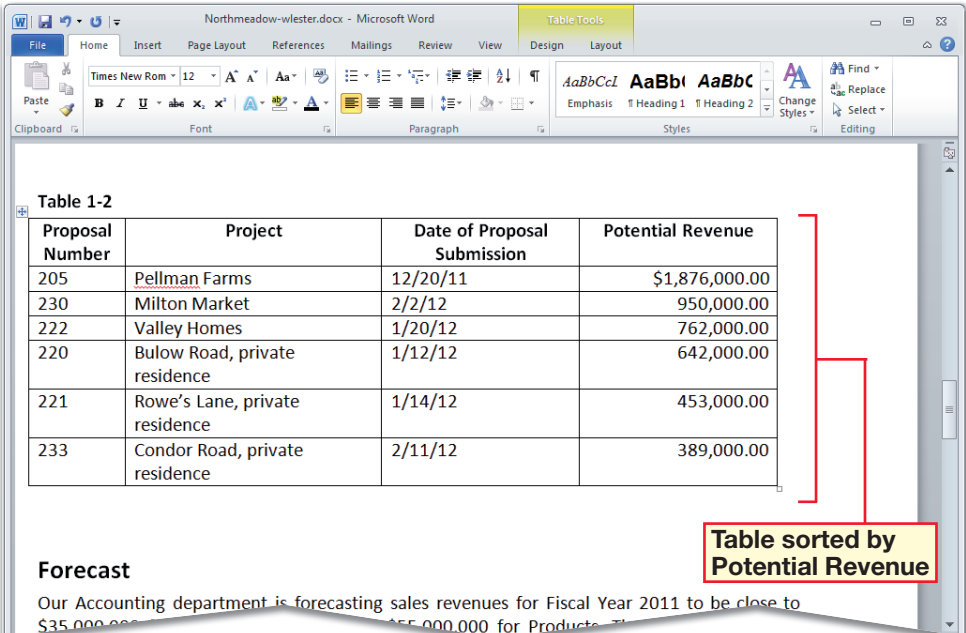
Sorting information in a table is quick and easy. You can sort by one or more columns in the table, including text, numbers, and dates. Sorting can help you see patterns in data and identify important information.

FIGURE 1.31 All cells selected

1 In your **Northmeadow** file, select all of the cells in **Table 1-2** on Page 2 (see Figure 1.31).

2 Click **Sort** [icon]. Under **Sort by**, select **Proposal Number** from the drop-down menu.

3 Under **Type**, select **Number**. Click **Ascending**. Click **OK**. The table is now sorted by Proposal Number.

4 With the table still selected, click **Sort** [icon].

5 Under **Sort by**, select **Potential Revenue** from the drop-down menu.

6 Under **Type**, select **Number**. Click **Descending**.

7 Click **OK**. Deselect the table.

8 **✓CHECK** Your screen should look like Figure 1.32.

9 Save your file.

➡ *Continue to the next exercise.*

Tech Tip

To help organize the data, display special formatting for the first row of the table, or define the header row.

FIGURE 1.32 Table content sorted in descending order

Perform Calculations in Tables

You can perform a calculation in a table by creating a formula. A formula can contain numbers, values in a table, or both. You could, for example, create a formula to add the prices of books you need to buy. Another kind of formula might find the average of your test grades. More complicated formulas can be used to help determine which of two options will yield the better results.

1 In your **Northmeadow** file, click in the last row in **Table 1-2**. The **Table Tools** contextual tab appears.

2 Choose **Layout>Rows & Columns>Insert Below**.

3 Click in the blank cell at the bottom of the **Potential Revenue** column.

4 Choose **Layout>Data> Formula**. The formula **=SUM(ABOVE)** appears in the **Formula** box (see Figure 1.33).

5 Click the **Number format** drop-down arrow. Select **$#,##0.00;($#,##0.00)**. Click **OK**.

6 **①CHECK** Your screen should look like Figure 1.34.

7 Save your file.

➡ *Continue to the next exercise.*

FIGURE 1.33 Formula dialog box

Formula box
Formula: =SUM(ABOVE)
Number format box
Number format: $#,##0.00;($#,##0.00)
Paste function:
Paste bookmark:
OK   Cancel
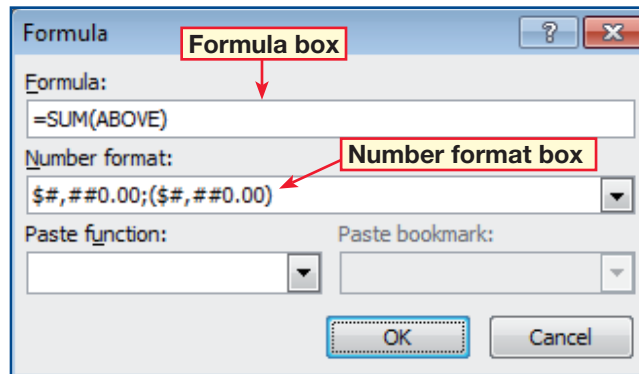
FIGURE 1.34 Table with formula

Table 1-2

Proposal Number	Project	Date of Proposal Submission	Potential Revenue
205	Pellman Farms	12/20/11	$1,876,000.00
230	Milton Market	2/2/12	950,000.00
222	Valley Homes	1/20/12	762,000.00
220	Bulow Road, private residence	1/12/12	642,000.00
221	Rowe's Lane, private residence	1/14/12	453,000.00
233	Condor Road, private residence	2/11/12	389,000.00
			$5,072,000.00

Cell with SUM formula

Forecast

Our Accounting department is forecasting sales revenues for Fiscal Year 2011 to be close to $35,000,000 for Services and more than $55,000,000 for Products. These forecasts do not include the revenue stream from our latest residential-development project, Pinewood Hills

Shortcuts

You can also click in the last cell of the last row and press TAB to automatically insert a row below the last row. Using the **Table Tools** choose **Layout Rows & Columns** to add a column to the left or right of a cell.

① In your **Northmeadow** file, in **Table 1-2**, click in the cell containing the date **12/20/11**. The **Table Tools** display.

② Choose **Table Tools> Layout>Merge>Split Cells** 🔲. In the **Number of columns** box, key: 1. In the **Number of rows** box, key: 3. Click **OK**. Deselect the cells.

③ Click after **12/20/11**. Press SPACE. Key: - Excavation.

④ Click in the blank cell below **12/20/11**. Key: 1/14/12 - Framing. In the next cell down, key: 1/19/12 - Masonry.

⑤ 🅲CHECK Your screen should look like Figure 1.35.

⑥ Select the first three cells in the last row. Choose **Table Tools>Layout>Merge> Merge Cells** 🔲. Deselect the cell.

⑦ Click inside the cell. Key: Total. Select the last row. Choose **Home>Font> Bold** 🅱. Deselect the text.

⑧ 🅲CHECK Your screen should look like Figure 1.36.

⑨ Save your file.

➡ *Continue to the next exercise.*
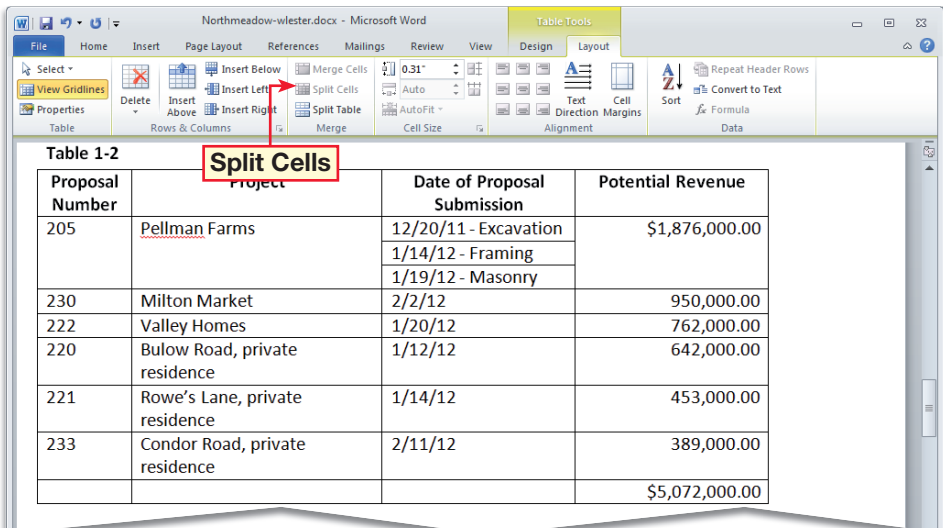
EXERCISE 1-14
Split and Merge Cells
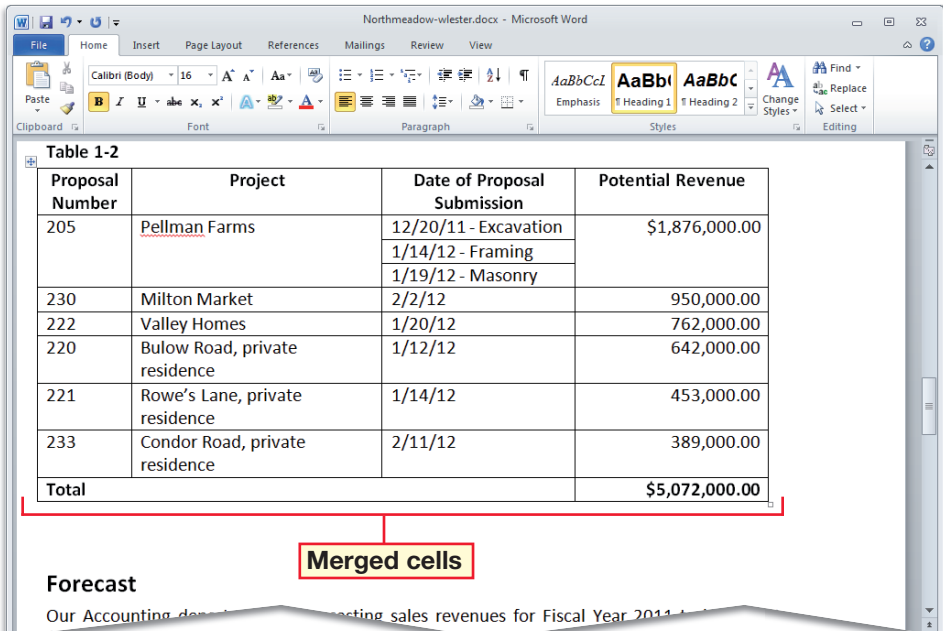
A table consists of columns and rows. The intersection of a column and a row is called a cell. Use the Split Cells command to divide a cell into two or more cells. Use the Merge Cells command to combine two or more cells into a single cell. You might split a cell to separate items in a cell or merge cells to create one cell for a heading centered above a group of cells or columns. Use the Table Tools to move, resize, and delete entire rows or columns of data, or to view a table's gridlines.

FIGURE 1.35 Split table cells

FIGURE 1.36 Merged table cells

1 In your **Northmeadow** file, find **Table 1-1** on Page 1. Select all of the cells in the table, except the first column and the first row. The **Table Tools** appear.

2 Choose **Layout> Alignment>Align Center** ⬛.

3 🛈CHECK Your screen should look like Figure 1.37.

4 Select the first row. Choose **Layout>Alignment> Text Direction** 🔠. Click **Text Direction** 〽 again. Deselect the text.

5 🛈CHECK Your screen should look similar to Figure 1.38.

6 Click in the **Services Division** cell in the second row. The **Table Tools** contextual tab appears.

➡ *Continued on the next page.*

You Should Know

You can also change text direction when formatting a shape or text box. Double-click the shape or text box and choose **Format> Text>Text Direction** to select an option.

EXERCISE 1-15
Modify Text Position and Direction

You can format a table to make it look more professional and easier to read. Change vertical alignment so that the text aligns along the top of the cell, along the bottom of the cell, or is centered in the cell. Change text direction to turn headings vertically. You can also adjust table properties, such as width, row height, alignment of the table, and alignment of each cell, to make information in the table more readable.

FIGURE 1.37 Center-aligned text in a table

Align Center

Growth Years
The following table illustrates which fiscal years showed growth for the Services Division and the Products Division.

Table 1-1

	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012
Services Division	X		X	X		X
Products Division		X	X		X	X

Text center aligned
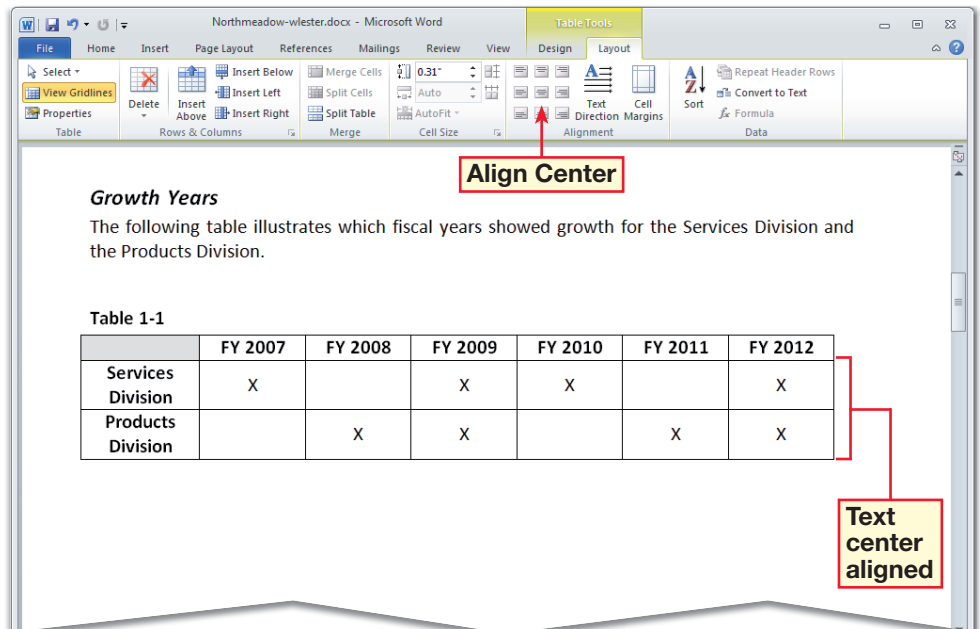
FIGURE 1.38 Modified text direction

Text Direction

Growth Years
The following table illustrates which fiscal years showed growth for the Services Division and the Products Division.

Changed text direction

Table 1-1

	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012
Services Division	X		X	X		X
Products		X	X		X	X

EXERCISE 1-15   **(Continued)**
Modify Text Position and Direction
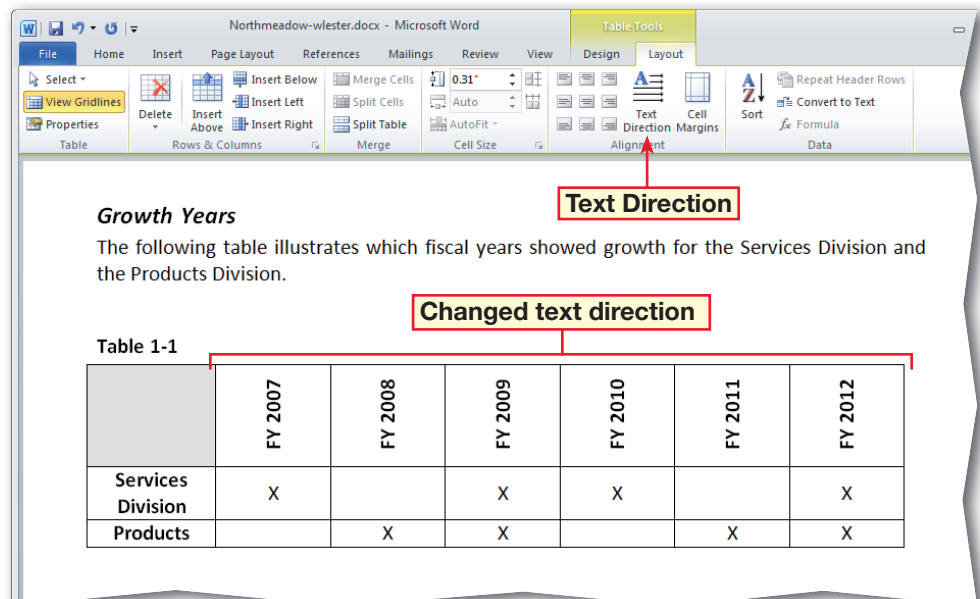
7 Choose **Layout>Table> Properties** 🖼. Click the **Column** tab.

8 Under **Size**, make sure the **Preferred width** check box is checked. In the **Preferred width** box, click the **up arrow** until **1.6″** appears (see Figure 1.39). Click **OK**.

9 Select all rows and columns in **Table 1-1**, except for the first column.

10 Choose **Layout>Table> Properties** 🖼.

11 On the **Column** tab, make sure the **Preferred width** check box is checked.

12 In the **Preferred width** box, click the **down arrow** until **0.4″** appears. Click **OK**. Deselect the text.

13 ⓘ**CHECK** Your screen should look like Figure 1.40. With your teacher's permission, print and save your file.

➥ *Continue to the next exercise.*

Tech Tip

Using tables can help you simplify information and clarify your main points. A table can be especially helpful when controlling page layout and the placement of text, graphics, or even other tables in your Word documents.

FIGURE 1.39 Table Properties dialog box

Check Preferred width

Click up arrow to 1.6″
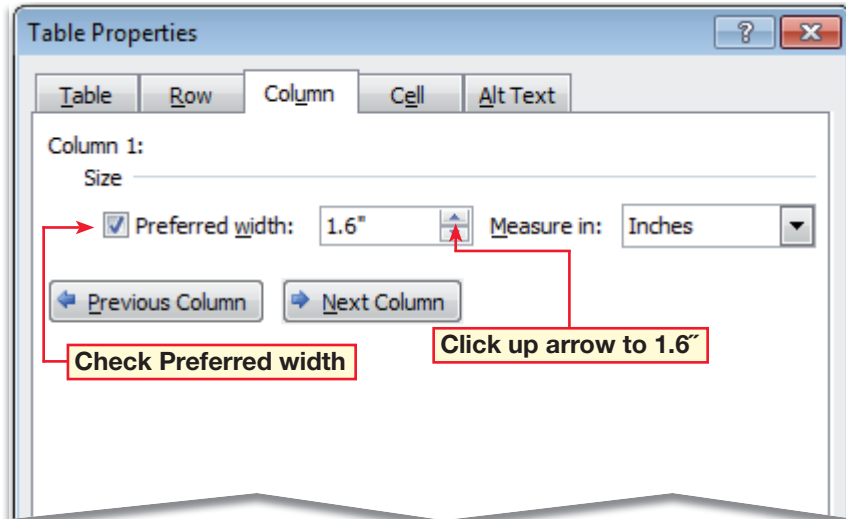
FIGURE 1.40 Table with modified properties

Column width 1.6″

Column width 0.4″
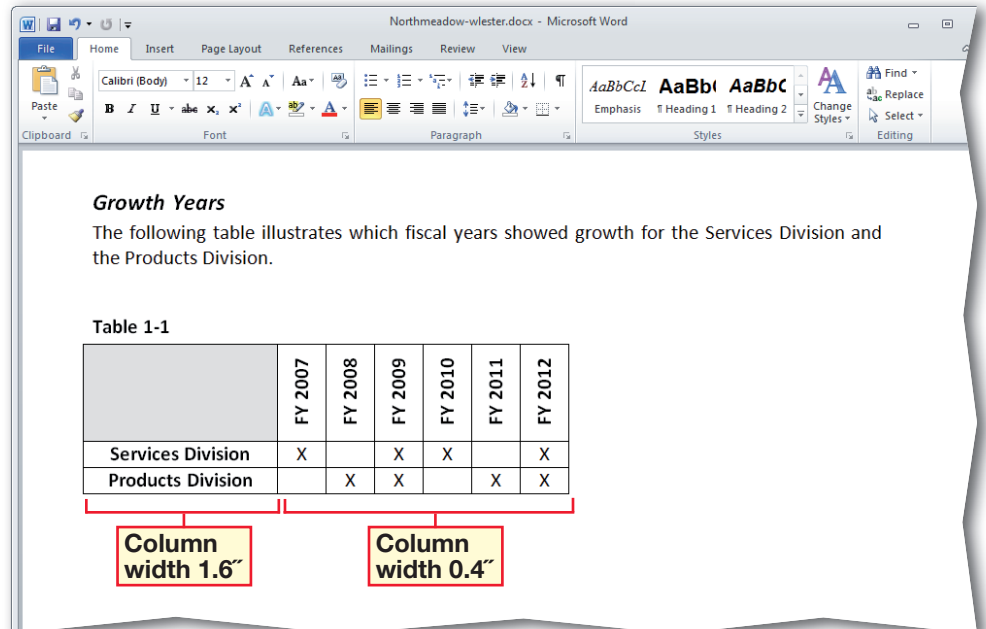
You Should Know

To draw a table that contains cells of different heights or a varying number of columns per row, choose **Insert> Table>Draw Table**. Draw the outer borders of the table and then add the column and row lines within the borders.

1 In your **Northmeadow** file, place the insertion point after **Last printed on** at the beginning of the document.

2 Press SPACE once. Choose **Insert>Text>Quick Parts** and click **Field**.

3 In the **Field** dialog box, under **Field names**, scroll down and select **PrintDate**.

4 Under **Date formats**, select the first format in the list (see Figure 1.41). Click **OK**.

5 Select the date. Choose **Insert>Text>Quick Parts>Field**.

6 Under **Field names**, select **PrintDate**. Under **Date formats**, select the sixth format in the list. Click **OK**.

7 *CHECK* Your screen should look like Figure 1.42.

8 Save your file.

➡ *Continue to the next exercise.*

Troubleshooter

If you did not print the document in Exercise 1-15, you will see a field code in your document instead of the date.

EXERCISE 1-16
Insert and Modify Fields

A field is a code that automatically inserts the date, time, page number, or other information into a document. Many fields also update automatically. For example, if you insert a page number and then delete a page in the document, the pages renumber automatically. Or, if you insert the date and time, Microsoft Word will automatically update the date and time.

FIGURE 1.41 Field dialog box
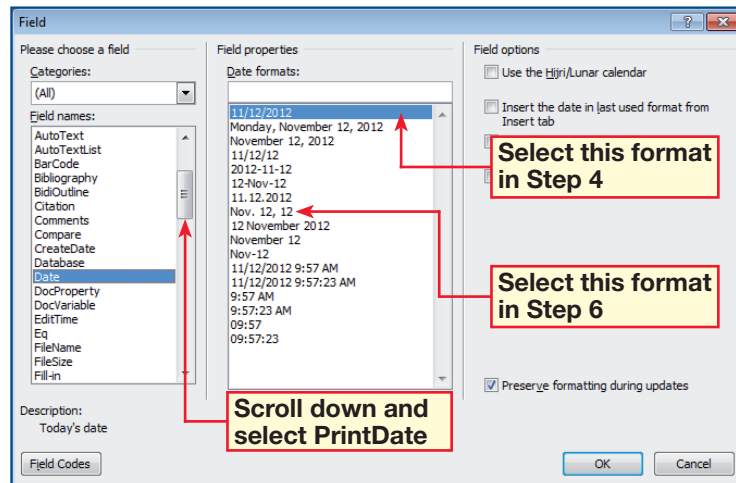
FIGURE 1.42 Date field inserted
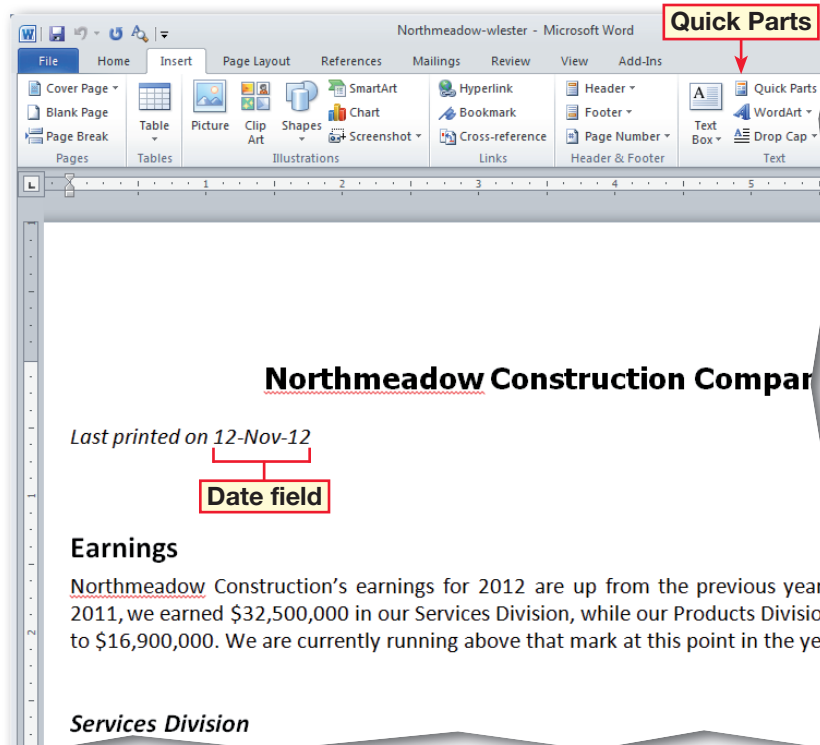
1 In your **Northmeadow** file, under **Services Division**, select **$7,712,000**.

2 Choose **Insert>Links> Bookmark** 🖉. In the **Bookmark name** box, key: Services_Profit (see Figure 1.43). Click **Add**.

3 Under **Forecast**, select **$35,000,000**. Add a bookmark named: Services_Forecast. Deselect the text. Scroll up to Page 1.

4 Choose **File>Options> Advanced**. Under **Show document content**, select **Show Bookmarks**. Click **OK**.

5 Choose **Home>Editing** and click the **Find** drop-down arrow. Select **Go To**. Under **Go to what**, select **Bookmark**. Select the bookmark name **Services Forecast**. Click **Go To**. Click **Close**.

6 **ⓘCHECK** Your screen should look like Figure 1.44.

7 Select **$7,712,000** again. Choose **Insert>Links> Hyperlink** 🖼. Under **Link to:** select **Place in This Document**. In the outline, click **Forecast**. Click **OK**. Save and close your file.

➡ *Continue to the next exercise.*

EXERCISE 1-17
Insert Bookmarks

A **bookmark** marks a place in a document. Bookmarks allow you to navigate quickly to sections of a document that you reference often. Bookmarked text is surrounded by brackets. You can also use a hyperlink as a bookmark to mark a location in a document or Web page, or link a hyperlink to an e-mail address.

FIGURE 1.43 Bookmark dialog box
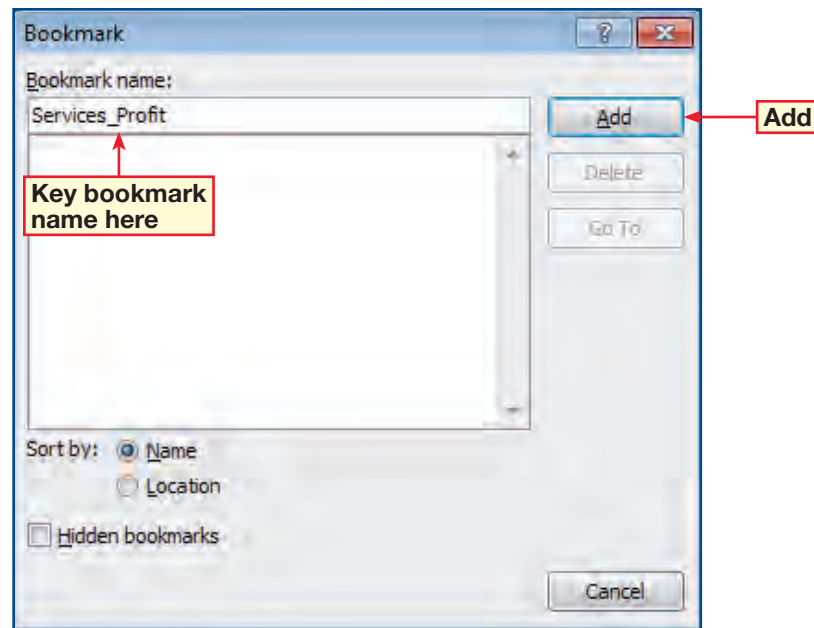
FIGURE 1.44 Bookmark displayed in document
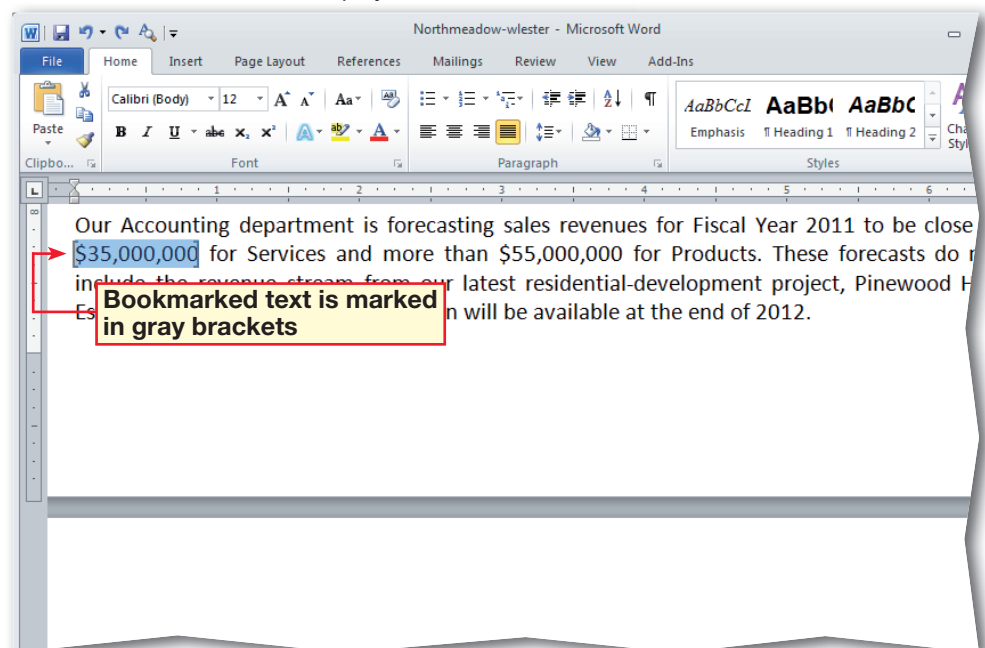
1. Open the data file **Announce.docx**. Save the file as: Announce-[your first initial and last name].

2. Choose **Mailings>Start Mail Merge>Start Mail Merge**. Select **Step by Step Mail Merge Wizard**.

3. In the **Mail Merge** task pane, make sure **Letters** is selected and click **Next: Starting document**.

4. Select **Use the current document**. Click **Browse**. Select **Use an existing list**. Click **Next: Write your letter**.

5. Locate the data file **Office Address List**. Click **Open**.

6. **CHECK** Your dialog box should look like Figure 1.45. Click **OK**.

7. In your Announce file, select **[Today's Date]**. Choose **Insert>Text>Quick Parts>Field**. Under **Field names**, select **Date**. Under **Date formats**, select the third format. Click **OK**. Click after the Date field and press ENTER four times.

8. In the task pane, click **Next: Write your letter**, click **Address block**. Click **OK**.

9. **CHECK** Your screen should look like Figure 1.46.

➡ *Continued on the next page.*

EXERCISE 1-18
Insert Name and Address Block

You can use the Mail Merge Wizard to create a form letter that you can send out in an e-mail or letter to each contact in an address list. When you insert **address block** or **greeting line** fields, Word automatically replaces the fields with an inside address and salutation for each recipient. This tool saves time when you must send several personalized letters at once. Use the Auto Check for Errors feature before performing a mail merge to see if any errors would occur.

FIGURE 1.45 Mail Merge Recipients dialog box
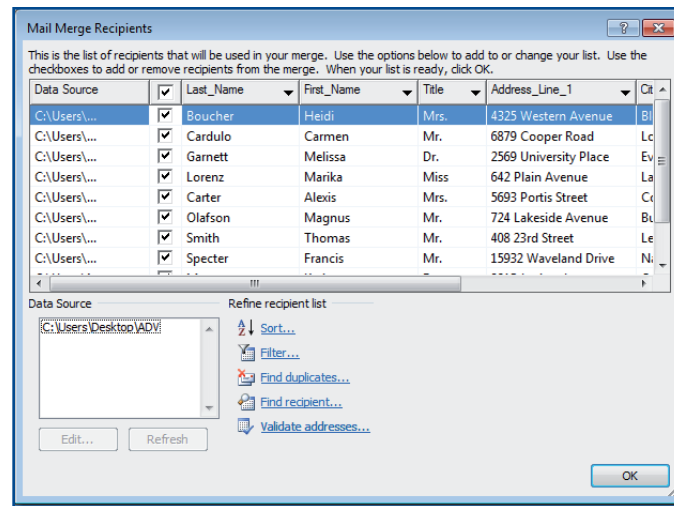
FIGURE 1.46 Mail Merge task pane
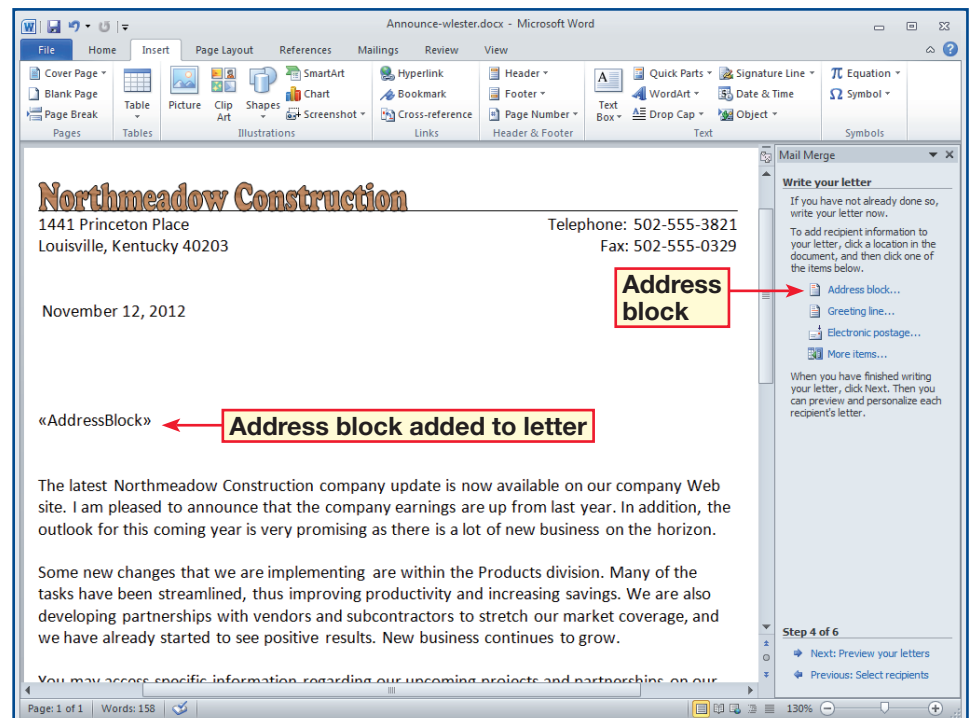
10 In your **Announce** data file, click after the **<<AddressBlock>>** field. Press ENTER twice.

11 In the **Mail Merge** task pane, click **Greeting line**. Click **OK** in the **Insert Greeting Line** dialog box.

12 Click **Next: Preview your letters** at the bottom of the **Mail Merge** task pane.

13 **CHECK** Your screen should look like Figure 1.47.

14 In the **Mail Merge** task pane, under **Make changes**, click **Edit recipient list**.

15 In the **Mail Merge Recipients** dialog box, click the check box next to the first name in the list. Click **OK**.

16 Choose **Mailings> Preview Results>Auto Check for Errors** . Read through each option in the dialog box. Select the first option. Click **OK**. Click **OK** again.

17 Click **Next: Complete the merge** at the bottom of the **Mail Merge** task pane.

18 **CHECK** Your screen should look like Figure 1.48. Save and close your file.

➥ *Continue to the next exercise.*

EXERCISE 1-18 (Continued)
Insert Name and Address Block

FIGURE 1.47 Mail Merge preview

Address block

Greeting line
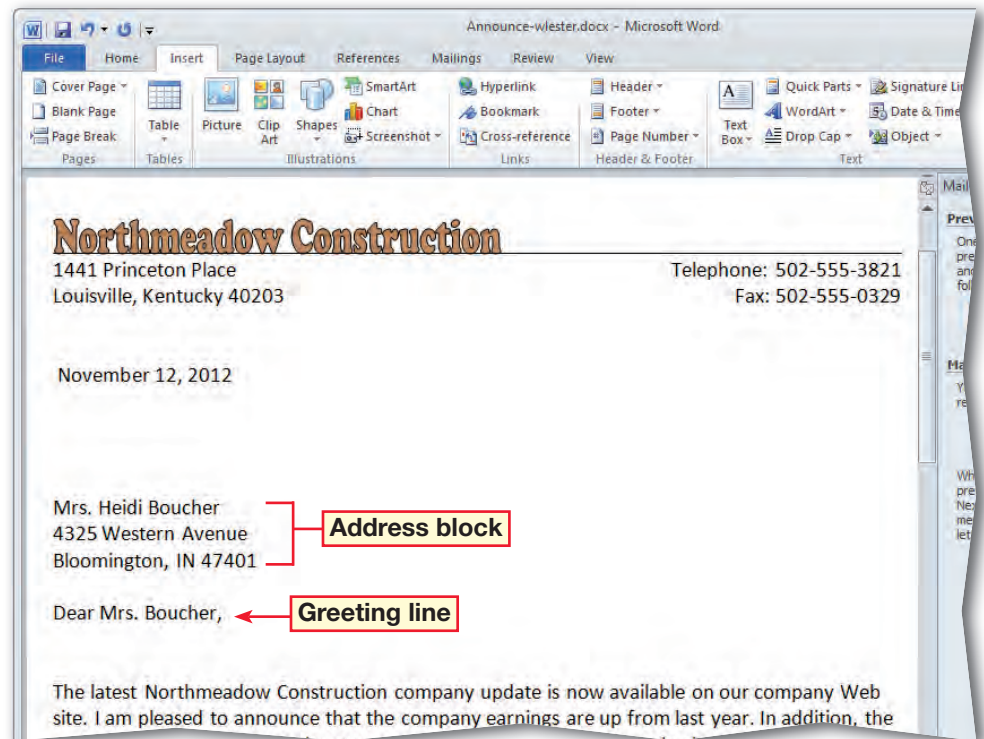
FIGURE 1.48 Recipient inserted in mail merge
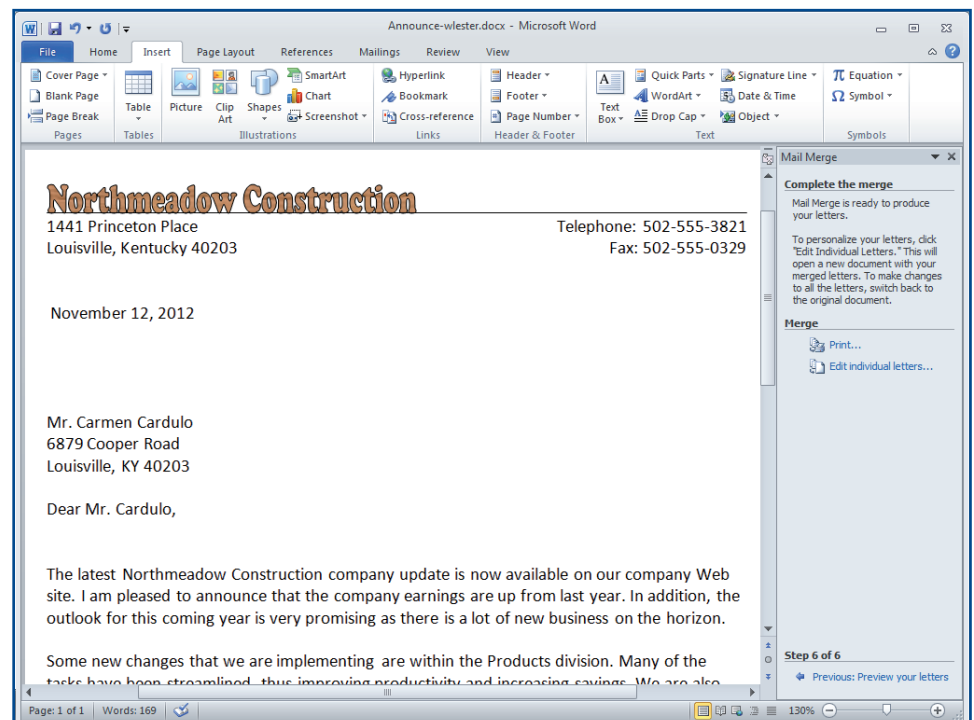
1 Open a new document and save the file as: Ex1-19-[your first initial and last name].

2 Choose **Mailings>Start Mail Merge>Start Mail Merge** . Select **Envelopes**.

3 In the **Envelope Options** dialog box, click **OK**. Key the return address as shown in Figure 1.49.

4 In the **Start Mail Merge** group, click **Select Recipients** . Choose **Use Existing List**.

5 Locate the data file **Office Address List.docx**. Click **Open**. Click in the lower-middle area of the envelope.

6 **CHECK** Your screen should look like Figure 1.49.

7 Choose **Mailings>Write & Insert Fields>Address Block** .

8 In the **Insert Address Block** dialog box, under **Specify address elements**, select **Mr. Joshua Randall Jr**.

9 **CHECK** Your dialog box should look like Figure 1.50. Click **OK**.

EXERCISE 1-19
Create Envelopes from Lists

In addition to using the Mail Merge tool to send several personalized letters at once, you can also use it to print addresses on envelopes for bulk mailings. The Mail Merge tool allows you to create envelopes from saved address lists, as well.

FIGURE 1.49 Envelope with recipient text box
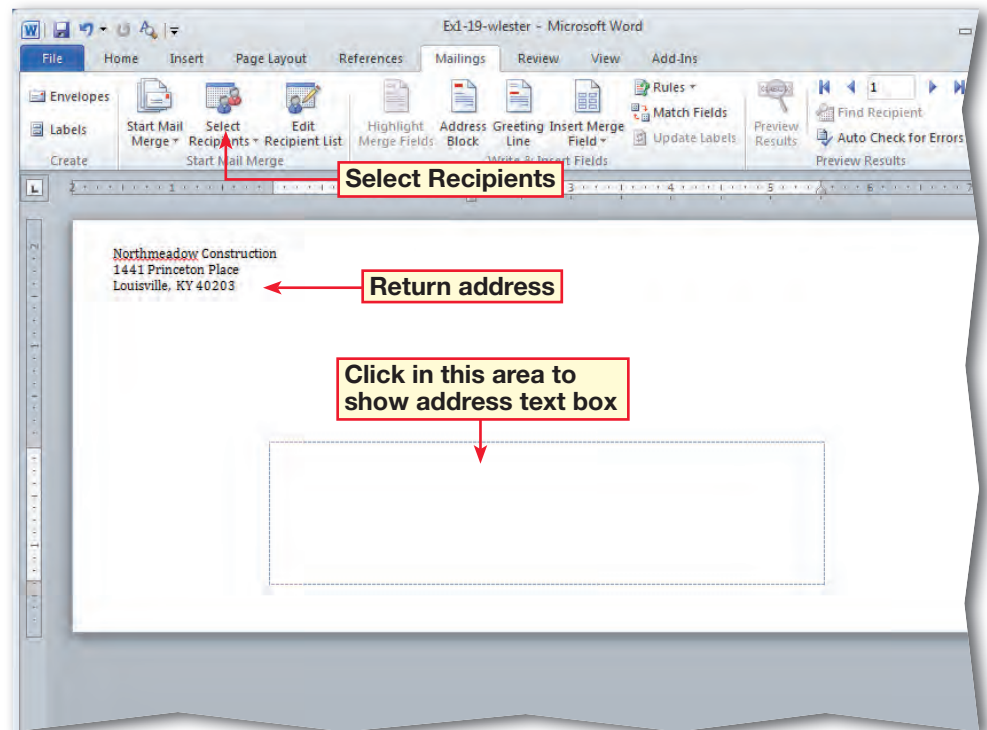
FIGURE 1.50 Insert Address Block dialog box

EXERCISE 1-19   (Continued)
Create Envelopes from Lists
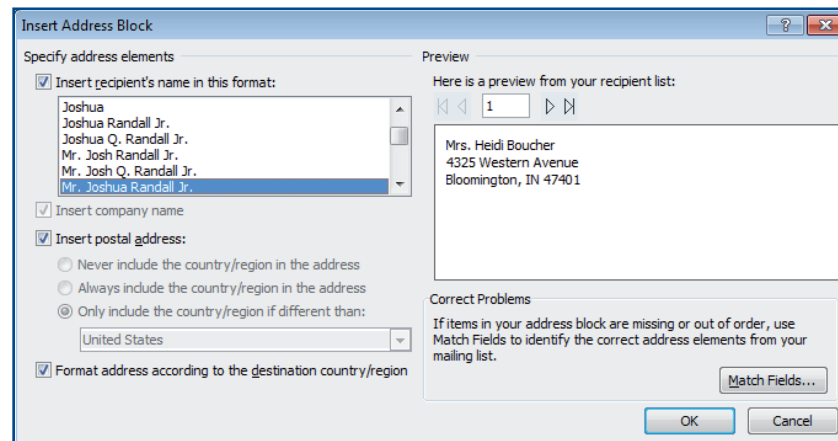
10 Select **Mailings>Finish> Finish & Merge** 🗐. Choose **Edit Individual Documents**.

11 In the **Merge to New Document** dialog box, select **All**. Click **OK**.

12 ⓘ **CHECK** Your screen should look like Figure 1.51.

13 Scroll through the envelopes. Choose **File>Print**.

14 ⓘ **CHECK** Your screen should look like Figure 1.52.

15 With your teacher's permission, click **Print** 🖶.

16 In the **Envelopes1** file, choose **File>Close**. Do not save changes. Save and close your file.

17 Exit **Word**.

FIGURE 1.51 Finished mail merge
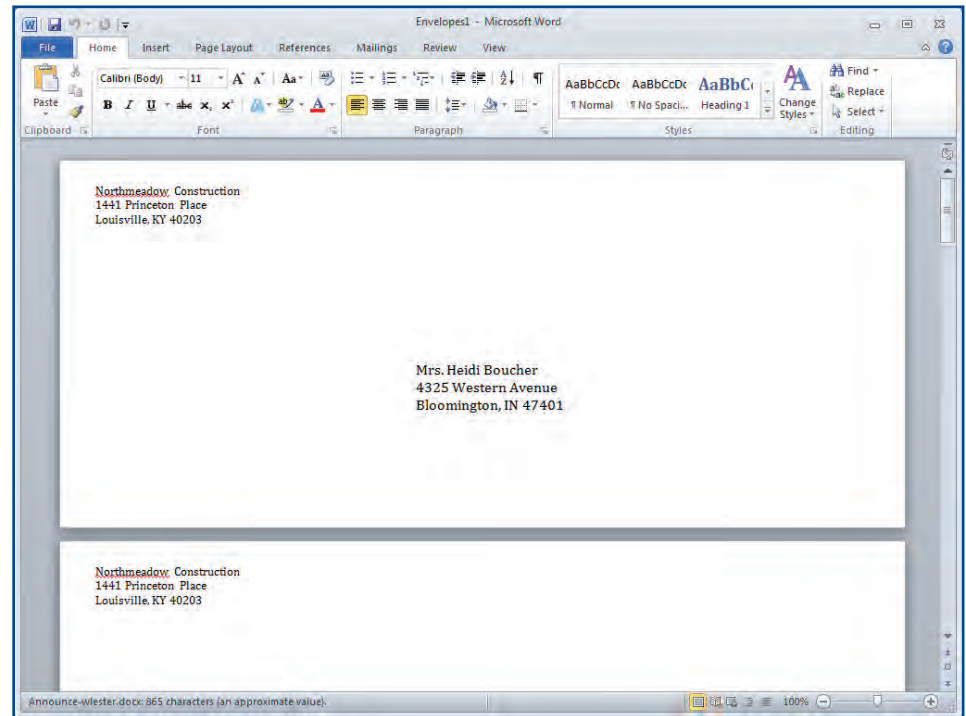
FIGURE 1.52 Address block added to envelope in Print Preview

You Should Know

You can change the envelope size and printing options by clicking **Start Mail Merge** 🗐 and selecting **Envelopes**.
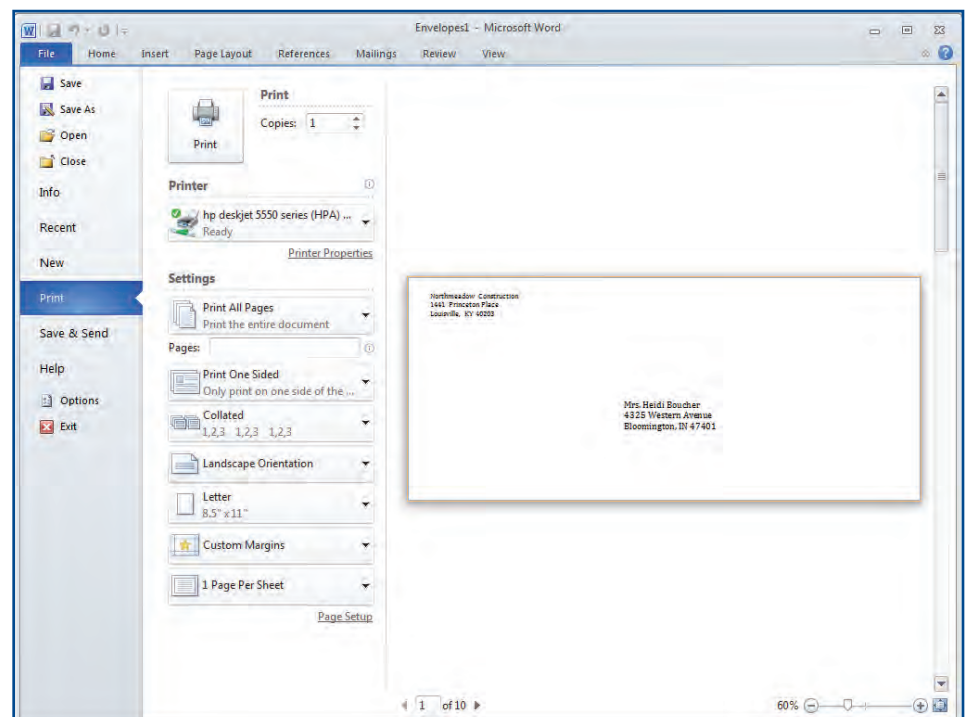
Writing MATTERS

Using Quick Styles in Word

A style is a set of different formats combined together to create one overall look. In Word, you can apply styles to characters, paragraphs, tables, and lists. The Styles Gallery allows you to add color and shading to your tables. You can create headings to organize your document. You can customize styles to reflect the exact formatting that you need for everything from text, to tables, lists, and text boxes.

The Styles Gallery

The Styles Gallery keeps track of every style that you create when you work in a document. The Normal, or default, style for Word is Calibri, 11 point. Whenever you change this default formatting, a new style appears in the Styles Gallery. This system makes it easy for you to track the different fonts, colors, sizes, indentations, alignments, and other formatting changes that you have applied to a document.

Once a style is listed in the Styles Gallery, you can click the style to apply it to selected text in your document. You can also use the gallery to clear formatting from selected items so that the text returns to the default Normal style.

When you create a custom style, it will appear in the Styles Gallery and can be applied to selected text. You could create a custom style to apply the format Palatino, 14 point, italic, blue, and small caps to the name of your business in one click. When you modify a custom style, existing text formatted with the custom style is updated.

The Importance of Styles

Using the Styles Gallery allows you to apply multiple formats to a document quickly and easily. Furthermore, when you apply a style using the gallery, that style is applied to all similar items in the document. Using Quick Styles ensures that your formatting remains consistent throughout your document.
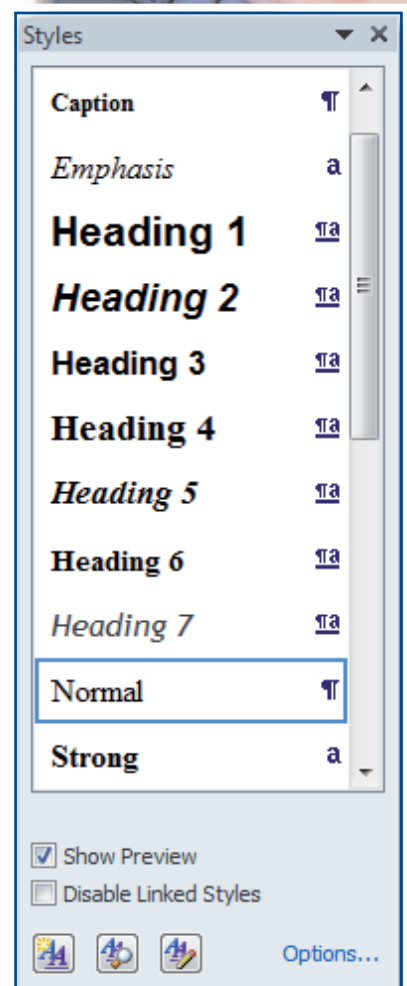
The Styles Gallery lists all the styles used in the current document.

1. State Which elements of a Word document can you change by applying Quick Styles?

2. Explain Why should you use the Styles Gallery to apply styles?

3. Write Design a flyer describing the different resources available at your school's library. Make a list using a different custom style for each resource. Your custom styles should all be complementary, to give your flyer a cohesive look.

Vocabulary

Key Terms

address block

ascending order

bookmark

brightness

compress

contrast

crop

descending order

graphic

greeting line

Merge Cells

orphan

resize

rotate

scale

Split Cells

widow

Academic Vocabulary

eliminate

specific

utilize

Review Vocabulary

Complete the following statements on a separate piece of paper. Choose from the Vocabulary list on the left to complete the statements.

1. When you remove white space around a graphic you _____ it. (p. 16)

2. You can _____ a graphic to resize it by numeric percentage. (p. 14)

3. Use the _____ command to combine cells to create a heading that is centered above a group of cells. (p. 24)

4. The first line of a paragraph that appears by itself at the bottom of a page is called a(n) _____. (p. 11)

5. Information that is sorted alphabetically from Z to A is listed in _____. (p. 21)

Vocabulary Activity

6. Make flash cards based on this lesson's Vocabulary and their definitions. Team with a classmate and take turns testing each other with the flash cards for this lesson. Make a note of any that you miss and study them carefully. Keep showing each other flash cards until you get all of them correct.

Review Key Concepts

Answer the following questions on a separate piece of paper.

7. What field can you add to a letter using Mail Merge? (p. 29)
   A. bookmark   C. greeting line
   B. image   D. signature

8. How can you make text flow around a graphic? (p. 16)
   A. Default settings   C. Widow/Orphan control
   B. Insert line breaks   D. Wrap text

9. Which command helps you crop or rotate a graphic? (p. 17)
   A. Insert>Picture   C. Format>Arrange
   B. Picture>Formatting   D. Home>Styles

10. When you embed a graph into your Word document using Excel, which application do you use to edit the graph? (p. 19)
    A. Word   C. Outlook
    B. Excel   D. PowerPoint

11. What order arranges a list from A to Z, 1 to 9, or earliest date to latest date? (p. 21)
    A. descending order   C. contrasting order
    B. ascending order   D. compressed order

Step-By-Step

1. Open the data file **Toys.docx**. Save the file as: Toys-[your first initial and last name]1.

2. Choose **Home>Styles** and click the **Styles Dialog Box Launcher**. Click **New Style** in the **Styles Gallery**.

3. Under **Properties**, in the **Name** box, key: Toys.

4. Under **Formatting**, select **Arial**, **16 pt**, and **Bold**. Click **Center Align**.

5. **CHECK** Your dialog box should look like Figure 1.53.

6. Click **OK**.

7. Select the text **Toy Drive**. In the **Styles Gallery**, click **Toys**.

8. Close the **Styles Gallery**.

9. **CHECK** Your screen should look like Figure 1.54.

10. Save and close your file.

1. Explore Custom Styles

Follow the steps to complete the activity.

FIGURE 1.53 Create New Style from Formatting dialog box
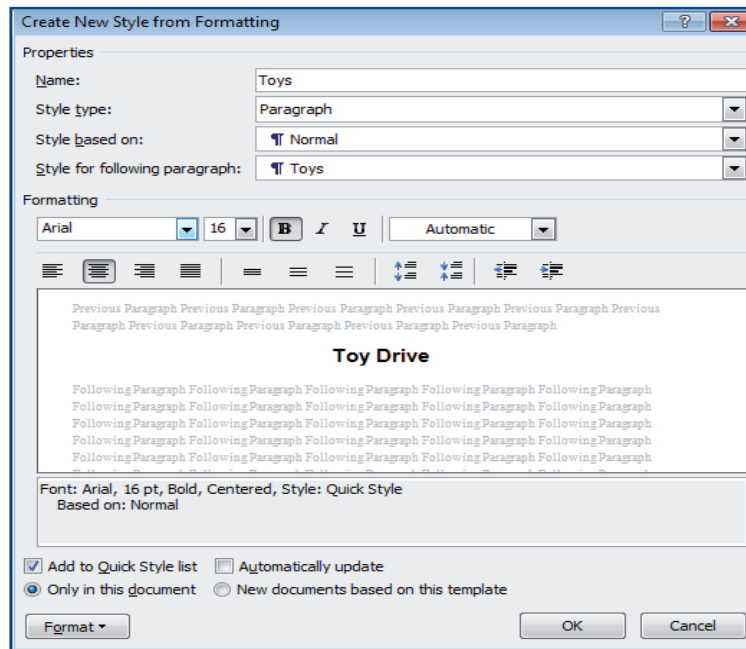
FIGURE 1.54 Custom style applied

Practice It Activities

2. Create a Chart Using Data from Another Source

Follow the steps to complete the activity. You must complete Practice It Activity 1 before doing this activity.
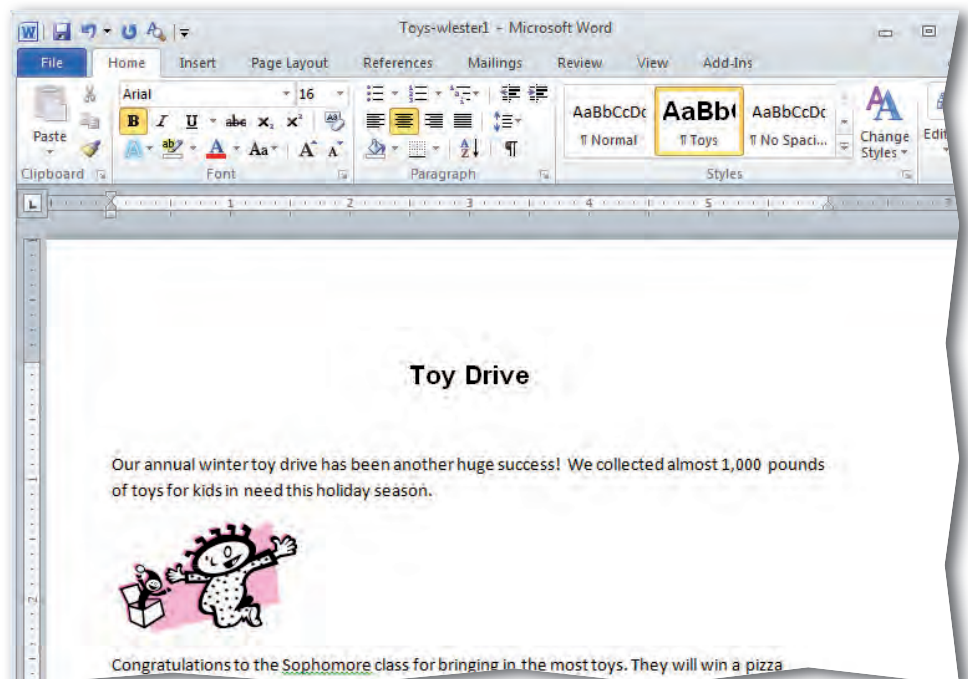
Step-By-Step

1. Open your **Toys-1** file. Save as: Toys-[your first initial and last name]2.

2. Click after the word **year**. Press [ENTER]. Choose **Insert>Text>Object** [icon].

3. In the **Object** dialog box, click the **Create New** tab. Click **Microsoft Excel Chart**. Click **OK**.

4. **CHECK** Your screen should look like Figure 1.55.

5. On the inserted chart, click the **Sheet1** tab. Select rows **6** and **7**. Choose **Home>Cells>Delete** [icon].

6. Open the data file **Count.xlsx.** Select **A1:E5**. Choose **Home>Clipboard>Copy** [icon].

7. In the datasheet for the inserted chart, select **A1:E5**. Press [CTRL] + [V].

8. Click the **Chart1** tab. Choose **Chart Tools>Design>Switch Row/Column** [icon].

9. **CHECK** Your screen should look like Figure 1.56.

10. Exit **Excel**. Save and close your **Toys-2** file.

FIGURE 1.55 Excel chart in Word
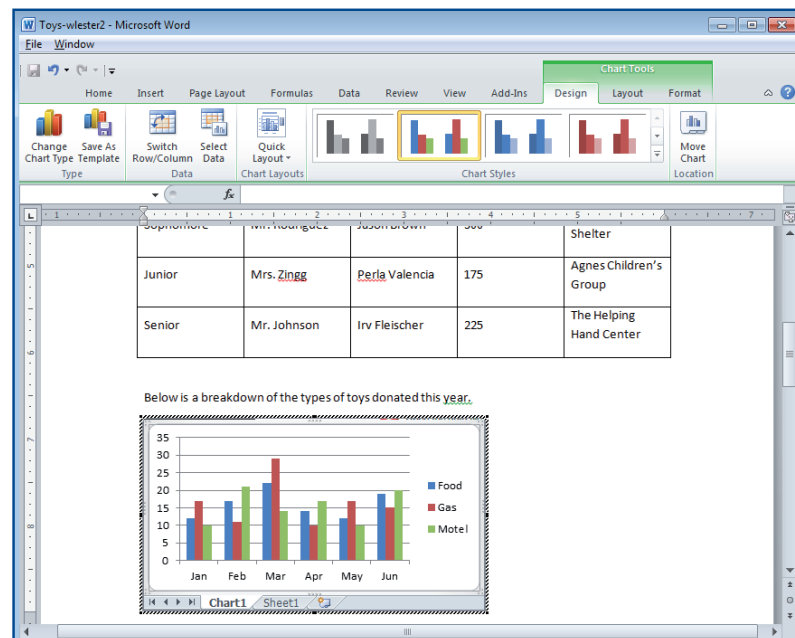
FIGURE 1.56 New data in Excel chart

Practice It Activities
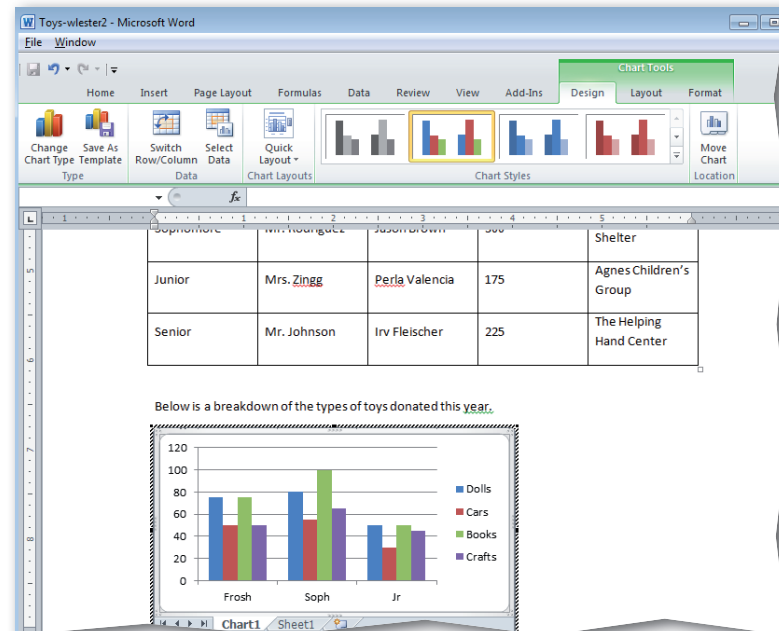
Step-By-Step

1 Open your **Toys-2** file. Save as: Toys-[your first initial and last name]3.

2 Select the last sentence in the document. Launch the **Styles Gallery**. Click **New Style** .

3 Name the style: Thanks. Choose **Bold**, **Italic**, and **16 pt**. Make the font **Blue**.

4 Click **Format** and select **Text Effects**. Select **Shadow**. Click **Presets** and select **Offset Right**. Click **Close**. Click **OK**.

5 **CHECK** Your screen should look like Figure 1.57. Close the **Styles Gallery**.

6 Double-click the graphic. Under **Wrapping style**, select **Tight**. Click the **Position** tab.

7 Set the horizontal alignment to **Right relative to Column**. Click **OK**.

8 **CHECK** Your screen should look like Figure 1.58. Save and close your file.

Follow the steps to complete the activity. You must complete Practice It Activity 2 before doing this activity.

FIGURE 1.57 Custom text style applied

A big thanks to everyone who participated!

Applied style
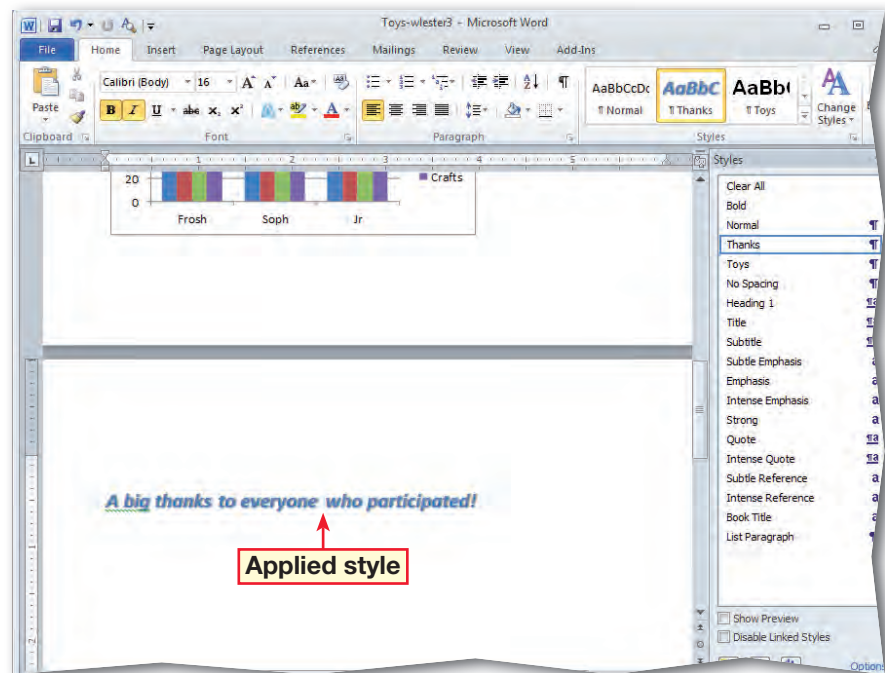
FIGURE 1.58 Wrapped text around object

Toy Drive

Our annual winter toy drive has been another huge success! We collected almost 1,000 pounds of toys for kids in need this holiday season.

Wrapped text

Congratulations to the Sophomore class for bringing in the most toys. They will win a pizza party, courtesy of Lincoln School.

Class	Teacher Captain	Student Captain	Final Toy Count	Place Going To
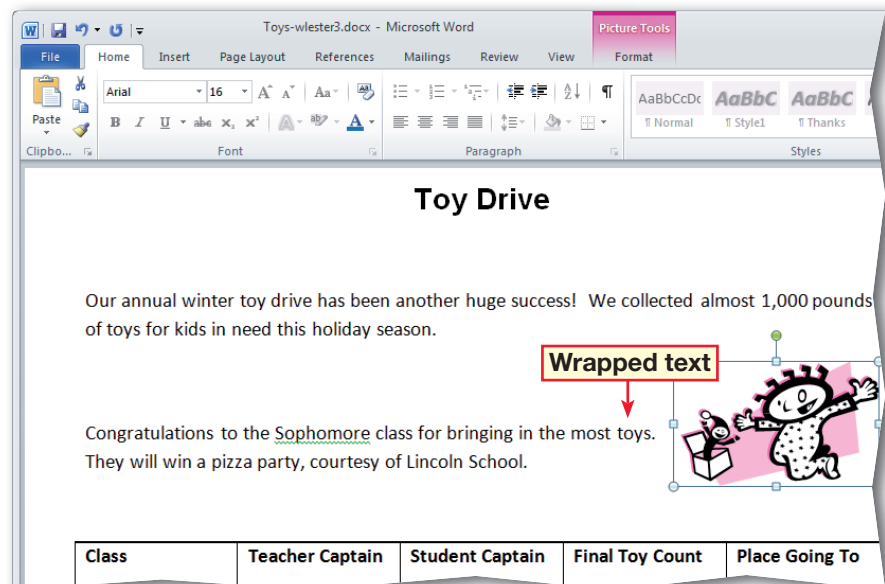
Step-By-Step

1. Open the data file **Friend.docx**. Save as: Friend-[your first initial and last name]4.

2. Select the paragraph between the first and second pages that contains the widow.

3. Format the paragraph to control **Widows/Orphans**.

4. ⓘCHECK Your screen should look like Figure 1.59.

5. Click before the third paragraph on the first page. Insert a theater graphic similar to the one in Figure 1.60.

6. Change the **Height** to **1.4″**. Wrap the text in your letter square around the graphic.

7. ⓘCHECK Your screen should look like Figure 1.60.

8. Save and close your file.

4. Control Pagination and Modify Graphics

DATA FILE

Your teacher has assigned you a pen pal named Samira, who lives in another country. Your assignment is to write Samira a letter using the Word skills you learned in this lesson. Use your knowledge of orphans and widows to correct the formatting.

FIGURE 1.59 Page with widow removed
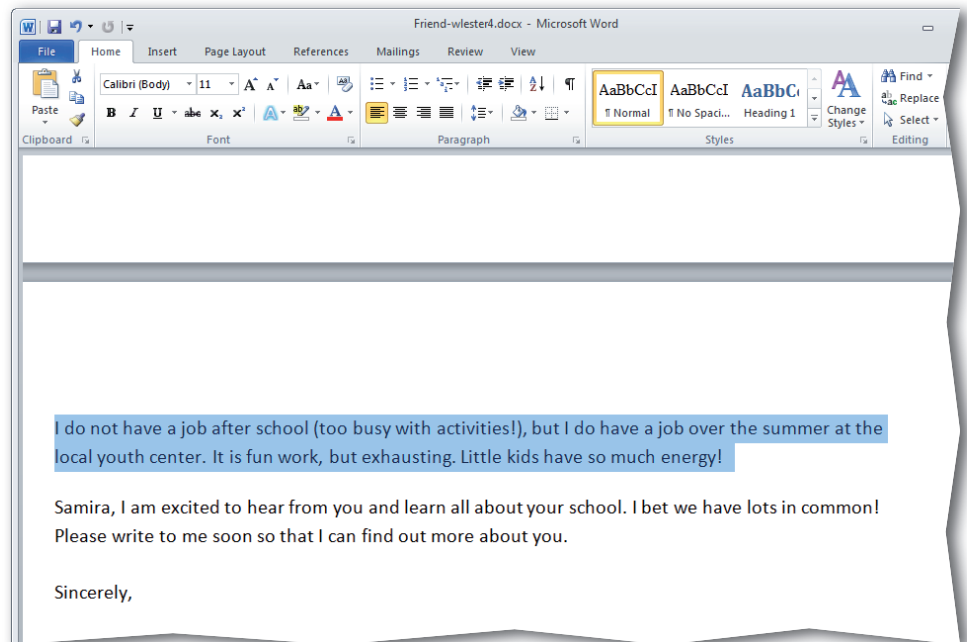
FIGURE 1.60 Modified graphic with wrapped text

5. Formatting in Word

You need to add a few finishing touches to give your letter to Samira a nice, polished appearance. Use your new Word skills to format the table so that it is easier to read. You must complete You Try It Activity 4 before doing this activity.
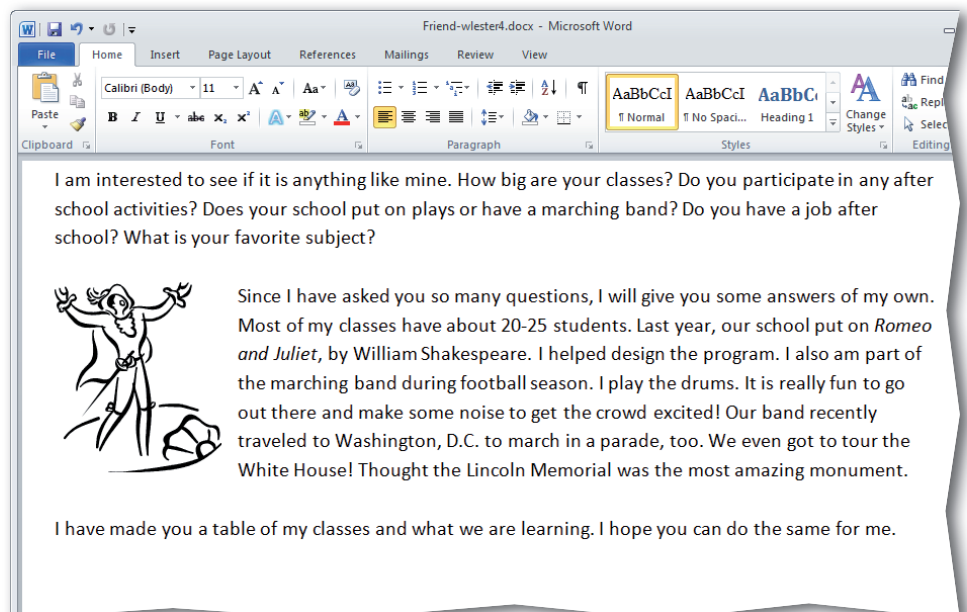
1. Open your **Friend-4** file. Save as: Friend-[your first initial and last name]5.

2. Click inside the table. Choose **Layout>Table> View Gridlines**. Create a custom style for the table in the letter by applying **All Borders** to the **Whole Table**.

3. Format the **Header Row** to **Bold** and **14 pt**.

4. Open the **Styles** task pane. Click the down arrow to the right of the **Normal** style listed in the task pane and click **Modify**.

5. Change the font to **Arial Narrow, 11 pt**. Click **OK**.

6. Apply the **Normal** style to the whole letter. **Center** the return address.

7. Resize the graphic's height to **1″**. Wrap the text tight around the graphic. Close the **Styles** task pane.

8. **CHECK** Your screen should look like Figure 1.61.

9. Save and close your document.

FIGURE 1.61 Revised letter

[your first and last name]
[your street address]
[your city, state, zip code]
[YOUR COUNTRY]
[your phone number]

[date]

Dear Samira,

I would like to introduce myself as your new pen pal. My name is [your name]. I am 14 years old and in the 9th grade. When our teacher, Mr. Romasanta, told us we would be getting pen pals from a different country, I was very excited.

One thing I would love to learn about is your school. I am interested to see if it is anything like mine. How big are your classes? Do you participate in any after school activities? Does your school put on plays or have a marching band? Do you have a job after school? What is your favorite subject?

Since I have asked you so many questions, I will give you some answers of my own. Most of my classes have about 20-25 students. Last year, our school put on *Romeo and Juliet*, by William Shakespeare. I helped design the program. I also am part of the marching band during football season. I play the drums. It is really fun to go out there and make some noise to get the crowd excited! Our band recently traveled to Washington, D.C. to march in a parade, too. We even got to tour the White House! Thought the Lincoln Memorial was the most amazing monument.

I have made you a table of my classes and what we are learning. I hope you can do the same for me.

Subject	Teacher	Currently Studying	Favorite Aspect
English	Mr. Yu	Charles Dickens	Reading about another time
Algebra	Miss Garcia	Sine and Cosine	Solving for x
Language Arts	Mrs. Wiseheart	Prepositional phrases	Speaking correctly
Physics	Mr. Washington	Inertia	Studying roller coasters
Drama	Miss Patterson	Tennessee Williams	Performing in front of my class
Computers	Mrs. Grant	Word Formatting	Making tables

I do not have a job after school (too busy with activities!), but I do have a job over the summer at the local youth center. It is fun work, but exhausting. Little kids have so much energy!

Samira, I am excited to hear from you and learn all about your school. I bet we have lots in common! Please write to me soon so that I can find out more about you.

Sincerely,

[your name]

6. Beyond the Classroom Activity

Language Arts: Line Breaks Find a poem that is at least five lines long.

- Key the poem as one paragraph into a new Word document.
- Insert manual line breaks where indicated in the original version.
- Click **Show/Hide** on the **Home** tab to see the manual line break symbols at the end of each line of the poem.

Save your document as: adv-w1rev-[your first initial and last name]6.

7. Standards at Work Activity

Microsoft Office Specialist Correlation

Word 2.1 *Apply font and paragraph attributes.*

DATA FILE

Modify a Document You work in an office. Your supervisor has asked you to format a short sales overview for company employees. She has asked that you use your advanced formatting skills to modify the look of the document. Open the data file **Company.docx**.

- Design a name and logo for your company using a graphic and custom style. Create custom styles for the document's headings.
- Apply a hyperlink to the company's logo and link the hyperlink to your teacher's e-mail address.
- Create a custom style for the **Earnings** table and add it to the Quick Tables Gallery.
- Adjust the size of the **Outlook** chart.
- Modify the color, size, and position of the **Forecast** Clip Art.

Then, on the second page of your document, key a paragraph identifying the modifications you made to the document. Explain why you used the formatting and how the edits you made will improve the document. Save your document as: Company-[your first initial and last name]7.

8. 21st Century Skills Activity

Digging up Data Learning good research skills can help you write papers, reports, and projects while in school. It can also help you write reports in your business life as well.

Write a page-long document on how you intend to find useful information online or in the library about a career that you are interested in learning more about. Use two different sources in your research and format your paper using three different techniques that you learned from this lesson. Save your document as: adv-w1rev-[your first initial and last name]8.

Before You Begin

Well-Designed Data
Financial reports and other data-heavy documents can benefit from strong design elements. Formatting your charts and tables can make data much more readable.

Reflect After you complete the projects, open a Word document and answer the following questions:

1. In what ways do visual elements, such as tables, enhance the readability of a document?

2. Why might a company use a table to format their financial data or control a page's layout?

9. Use and Modify Graphics

Language Arts: Create an Agenda You are a member of the Future Business Leaders club. You need to create an agenda for the next meeting.

- Insert a business-oriented graphic to use as the club's logo.
- Apply artistic effects or picture styles, and crop, resize, and decrease the contrast on the graphic. Below the graphic, key the name: Business Leaders. Save the logo to the Quick Parts Gallery.
- Create a schedule, or agenda, for the club's next meeting. Allot time for introductions, a report on past activities, and the main topic of discussion, company annual financial reports.
- Create a text box that includes a list of future events. Use the Drawing Tools to modify the text box style and add shadow and 3D effects.

Save your document as: w1rev-[your first initial and last name]9.

10. Search for Annual Reports

Format a Table and Insert a Chart Go online (or ask for help at your local library) and find the most recent annual reports for three different companies. Look for **Information for Investors** on the site to locate these reports. Read through the reports to find each company's net earnings for the past three years. Create a table with the following information:

- Create the header: Companies' Net Earnings.
- Key the names of each company in the header row and apply a hyperlink to each company's Web site.
- Key the years for each report in the first column.
- Create and apply a custom table style to your table. Create a chart based on your table. Save the table to Quick Tables Gallery.

Save your document as: w1rev-[your first initial and last name]10.

11. Create a Custom Text Style

DATA FILE

Language Arts: Prepare a Business Letter for Mailing Write a letter that can be sent to five local business owners. In the letter, describe your club and invite the business owner to speak to your club at a meeting.

- Use mail merge to add name and address blocks.
- Use the **Business_Club.docx** data file for the addresses.
- Create envelopes for each letter. Use the Auto Check for Errors tool.

Save your document as: w1rev-[your first initial and last name]11.

Microsoft Office Word has many interesting and useful features that will help you format customized documents. For example, you can create forms in which users can input text, check a box, or select options from a list. You can create various customized formats, themes, and watermarks. Finally, you can format your long documents so that they are easier to navigate through and read. For example, you can add leaders and tabs to your index, table of contents, or table of figures, and you can add and modify captions and cross-references.

Key Concepts

- Create forms and modify options for form fields

- Add watermarks, background colors, and Fill Effects

- Insert and modify captions and cross-references

- Create and customize tables of contents, figures, and authorities

- Create and modify indexes

21st CENTURY SKILLS

Appreciate Diversity Everyone is unique, and our uniqueness allows us to appreciate diversity. In a business office, for example, men and women of various ages and ethnic backgrounds, and with different abilities, experiences, and beliefs, work most effectively when they value and appreciate each other's strengths. At the same time, the better you know someone, the more you discover how similar you are. People from different backgrounds share many of the same values, fears, hopes, and interests. Think about someone you know from a different background. After identifying how you are different, think about how much you have in common. *What are three valuable things you have learned this month from other people?*

Standards

The following standards are covered in this lesson. Refer to pages xxiv and 715 of the Student Edition for a description of the standards listed here.

ISTE Standards Correlation

NETS•S

1a, 1b, 2a, 2b, 2c, 2d, 3a, 3c, 4b, 4c, 4d, 5b, 6a, 6d

Microsoft Office Specialist

Word

1.1, 1.2, 1.4, 1.6, 2.1, 2.2, 2.7, 3.1, 3.2, 3.3, 3.4, 3.5, 4.1, 4.2, 4.3, 6.3

Nancy Ney/CORBIS

Before You Read

Double-Check Your Work Review papers you prepare for school or work to ensure that all questions are answered and relevant. Double-checking your work is a big step toward improving your grades.

Read To Learn

- Consider how enhancing themes and backgrounds of a document can present a uniform appearance for your organization.
- Discover how to use advanced indexing features to make long documents easy to navigate.
- Explore using Building Blocks and templates to quickly customize business letters and other documents.

Main Idea

Word's advanced formatting features allow you to create long, easily navigable, and professional documents.

Vocabulary

Key Terms

caption	protect
cross-reference	tab leader
Fill Effects	table of authorities
form	table of figures
form field	theme
index	watermark

Academic Vocabulary

You will find these words in your reading and on your tests. Make sure you know their meanings.

  alter
  generate
  minimize

Quick Write Activity

Describe On a separate sheet of paper, describe the last time you used an index to find something in a book or other document. Did you find what you were looking for? How long did it take you to locate the information you needed?

Study Skills

Use Color Try using different colored pens to help you learn new material or study for a test. You could use red for key terms, blue for explanations, and green for examples.

Academic Standards

English Language Arts

   NCTE 4 Adjust use of language to communicate effectively with a variety of audiences.

   NCTE 5 Employ a wide range of strategies while writing to communicate effectively with different audiences.

   NCTE 8 Use information resources to gather information and create and communicate knowledge.

Math

   NCTM (Measurement) Understand measurable attributes of objects and the units, systems, and processes of measurement

1 Start **Word**. Open the data file **Registration.docx**. Save as: Registration-[your first initial and last name].

2 Choose **File>Options> Customize Ribbon**. Under **Customize the Ribbon**, check the box in front of **Developer**, if it is not already checked (see Figure 2.1). Click **OK**.

3 Click after **Name**. Press SPACE. Choose **Developer>Controls> Legacy Tools**. Click **Text Form Field** abl. Click before **Morning Session**.

4 Click **Legacy Tools**. Click **Check Box Form Field**. Press SPACE.

5 Click before **Afternoon Session**. Repeat Step 4.

6 **CHECK** Your screen should look like Figure 2.2.

7 Click after **Morning Session**. Press SPACE. Click **Legacy Tools**. Click **Drop-Down Form Field**.

8 Double-click the drop-down form field. In the **Drop-down item** box, key: Working With Each Other. Click **Add**.

9 In the **Drop-down item** box, key: Understanding Differences. Click **Add**. Click **OK**.

➡ *Continued on the next page.*

EXERCISE 2-1
Create and Modify Forms

One of the easiest ways to obtain information from a large number of people or organizations is to create and distribute a form. You can insert form fields such as check boxes and drop-down options. After a form is created, you should protect it so that users cannot change, or alter, the text and formatting of your document. To create forms, you must add the Developer tab to the Ribbon.

FIGURE 2.1 Word Options
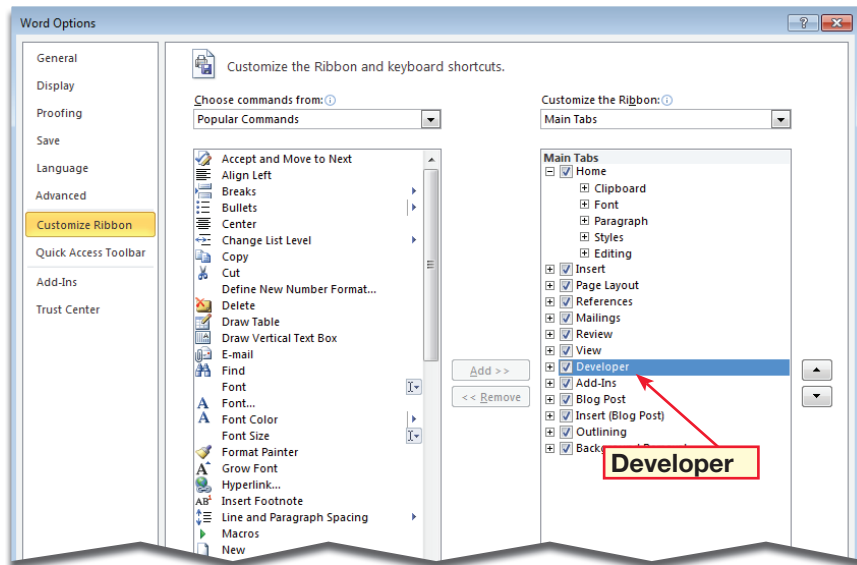
FIGURE 2.2 Adding text and check box fields
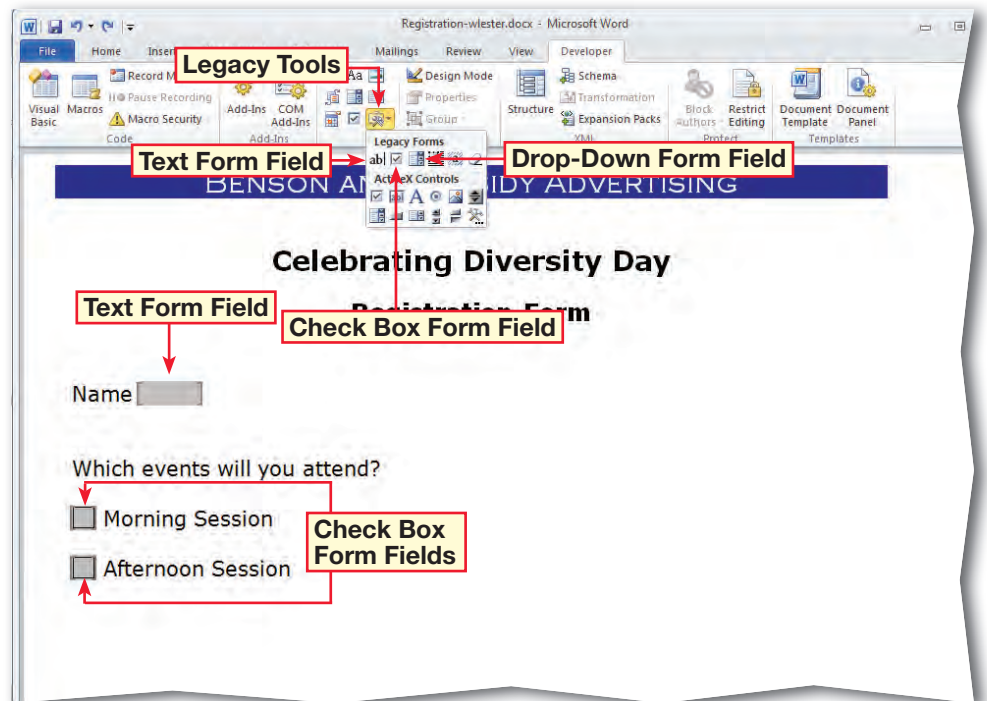
10 Click after **Afternoon Session**. Press SPACE. Add a **Drop-Down Form Field**. Double-click the form field. Add: Resolving Conflicts and Respect and Rights.

11 Click **OK**. Double-click the **Name** form field. Under **Text form field**, change **Maximum length** to: 15. Change the **Text format** to **Uppercase** (Figure 2.3).

12 Click **OK**. Double-click the check box before **Morning Session**. Under **Default value**, select **Checked**. Click **OK**. Select **Protect> Restrict Editing**.

13 Check the box under **Editing Restrictions**. Click the drop-down arrow. Select **Filling in forms**. Click **Yes, Start Enforcing Protection**. Click **OK**. Close the task pane. In the **Name field**, key: [your first initial and last name].

14 Click the **Morning Session** drop-down arrow. Select **Understanding Differences**. Select **Respect and Rights** for the **Afternoon Session**.

15 **CHECK** Your screen should look like Figure 2.4. Save and close your file.

➥ *Continue to the next exercise.*

EXERCISE 2-1 (Continued)
Create and Modify Forms

FIGURE 2.3 Text Form Field Options dialog box
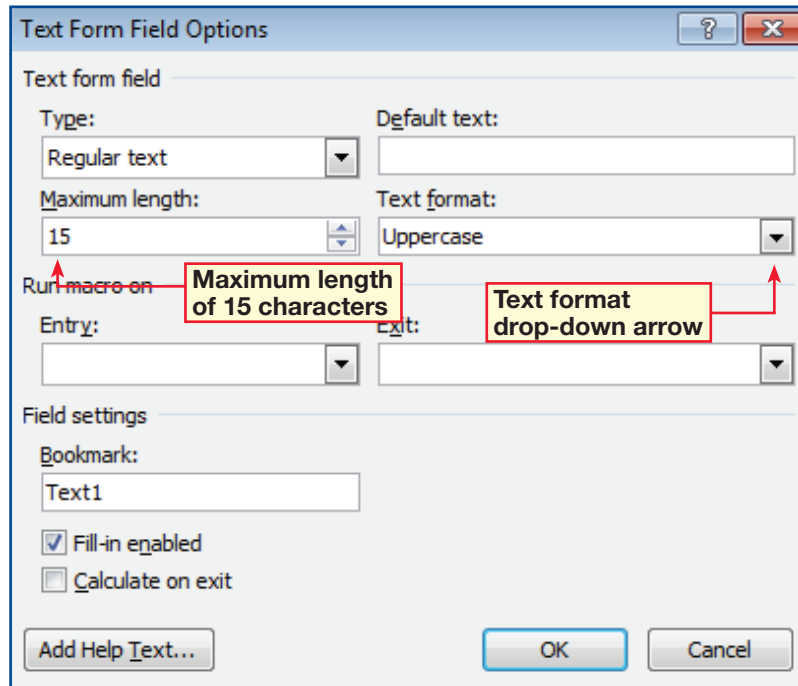
FIGURE 2.4 Form filled out

EXERCISE 2-2
Create and Publish a Blog Post
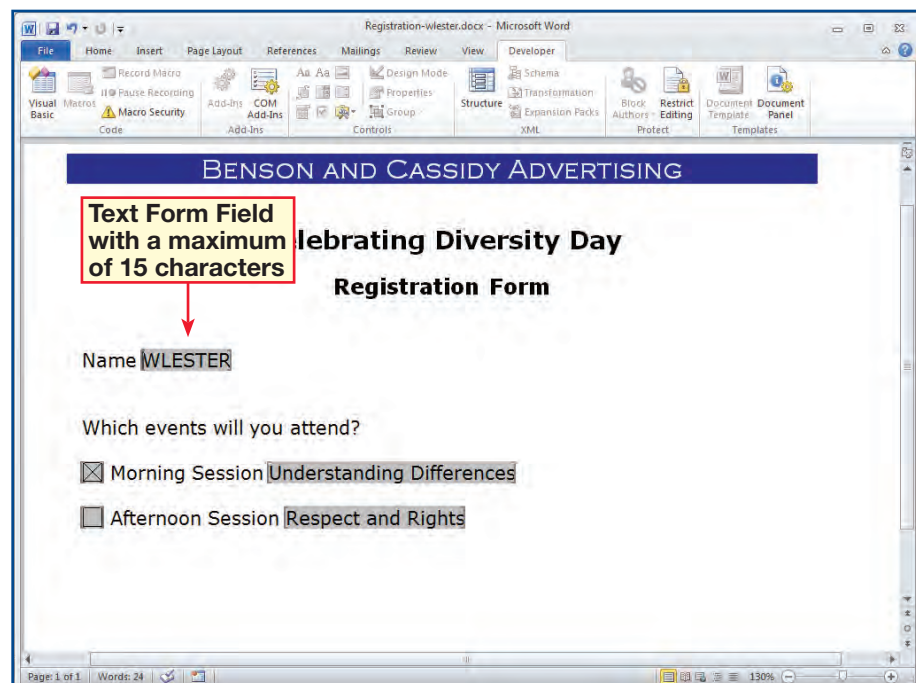
1 With your teacher's permission, go to **en.wordpress.com**. Follow your teacher's instructions to sign in to WordPress.

2 Roll over **My Blogs**. Select **Register a New Blog**.

3 In the **Blog Address** box, enter: [your first initial and last name]123. If the blog address is not available, make slight modifications until it is. Click **No thanks, I'll use the free wordpress.com address.**

4 In the **Blog Title** box, enter: [your first initial and last name]. Under **Privacy**, select **private**.

5 **CHECK** Your screen should look like Figure 2.5.

6 Click **Create Blog**.

7 Open your **Registration** file. Click **File>Save & Send**. Click **Publish as Blog Post**.

8 Under **Publish as Blog Post**, click **Publish as Blog Post**.

9 In the **Register a Blog Account** dialog box, click **Register Now**. In the **New Blog Account** dialog box, in the **Blog** drop-down menu, select **WordPress** (see Figure 2.6). Click **Next**.

➥ *Continue to the next page.*

Another great way to share information with a large number of people is through a blog post. Blogging refers to publishing content to the Web or within an organization. In order to publish a blog post so that other people can read it, you must first have a blog account. The first time you publish a blog post from Microsoft Word, you need to register your blog account.

FIGURE 2.5 Setting up a blog account in WordPress

FIGURE 2.6 New Blog Account dialog box

EXERCISE 2-2 (Continued)
Create and Publish a Blog Post

⏚ In the **New WordPress**
Account dialog box, in the
Blog Post URL box, enter
the URL for your blog where
indicated (for example:
wlester123.wordpress.com).

10 In the **New WordPress**
Account dialog box, in the
Blog Post URL box, enter
the URL for your blog where
indicated (for example:
wlester123.wordpress.com).

11 In the **User Name** box,
enter the WordPress
account's user name. In the
Password box, enter the
account's password.

12 Click **OK**. In the warning
box, click **Yes**. In the
confirmation box, click **OK**.

13 At the top left of the
document, click on the text
[Enter Post Title Here]
(see Figure 2.7). Key:
Registration Form.

14 With your teacher's
permission, choose **Blog**
Post>Blog>Publish .
Enter the account's **User**
Name and Password.
Click **OK**. Click **Yes**.

15 Navigate back to
WordPress. Click **Visit your**
dashboard. At the left of
the screen, click **Posts**.

16 Click **Registration Form**.
Click **View Post**.

17 **CHECK** Your screen
should look similar to
Figure 2.8. Close but do not
save the blog file. Close the
Registration file. Log out
of WordPress.

➡ *Continue to the next exercise.*

FIGURE 2.7 Entering blog post title
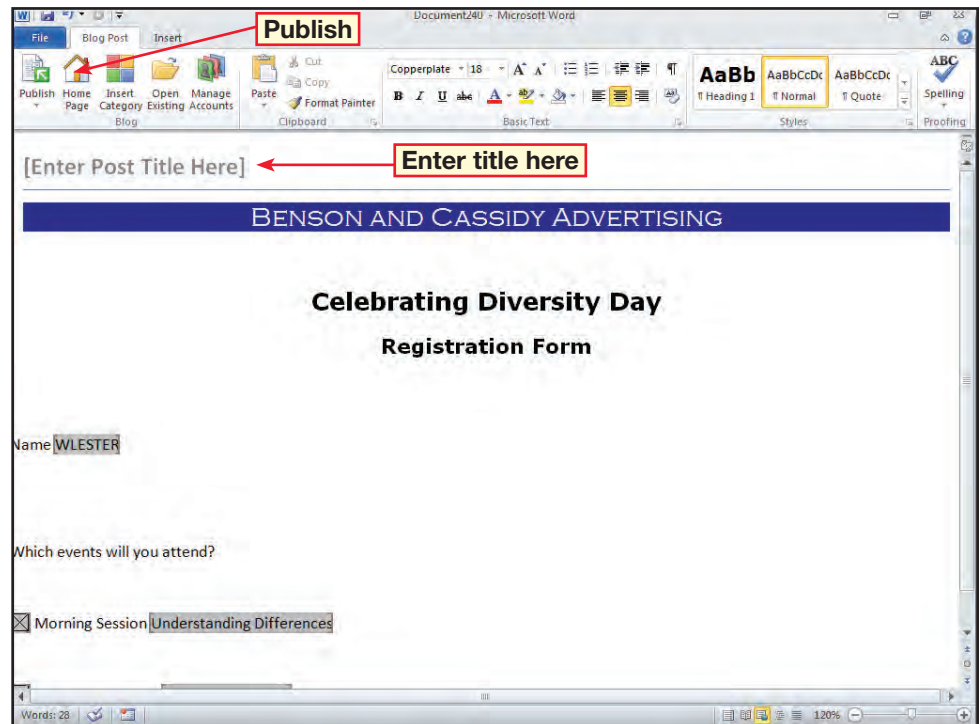
FIGURE 2.8 Blog post published with registered blog account
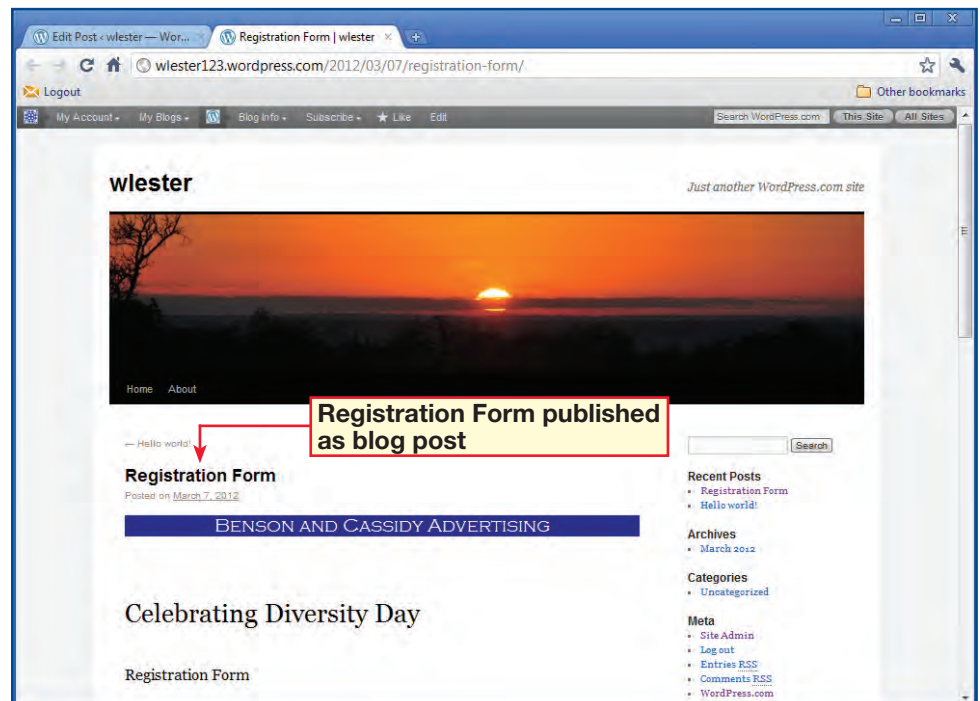
1 In your **Registration** file, choose **Developer> Protect>Restrict Editing**. Click **Stop Protection**.

2 Choose **Page Layout> Page Background> Page Color**. Click **Yellow**.

3 Click **Page Color**. Select **Fill Effects**.

4 In the dialog box, click the bottom-right square under **Variants**. Click the **Color 1** drop-down arrow. Select **Light Blue** (Figure 2.9).

5 Click **OK**.

6 Choose **View>Document Views>Web Layout** to see what your form would look like as a Web page. Click **Print Layout**.

7 In the **Restrict Formatting and Editing** task pane, click **Yes, Start Enforcing Protection**.

8 In the dialog box, key: Form1. Reenter: Form1. Click **OK**. Close the task pane.

9 **CHECK** Your screen should look like Figure 2.10. Save and close your file.

➡ *Continue to the next exercise.*

EXERCISE 2-3
Add and Modify Background Colors and Fill Effects

If you will be publishing your document as a Web page, you might want to enhance its appearance. You can change the color of the background of your document. You can also create different shading patterns using **Fill Effects**.

FIGURE 2.9 Fill Effects dialog box

Color 1 drop-down arrow

Select this variant
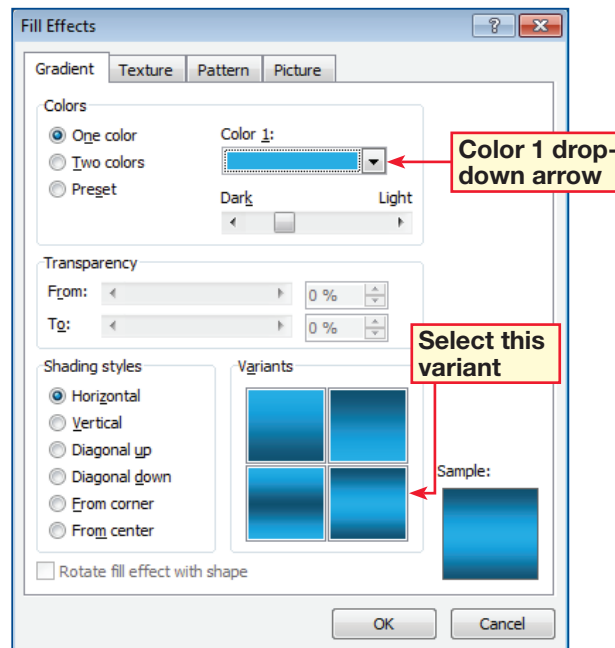
FIGURE 2.10 Protected document with new background applied
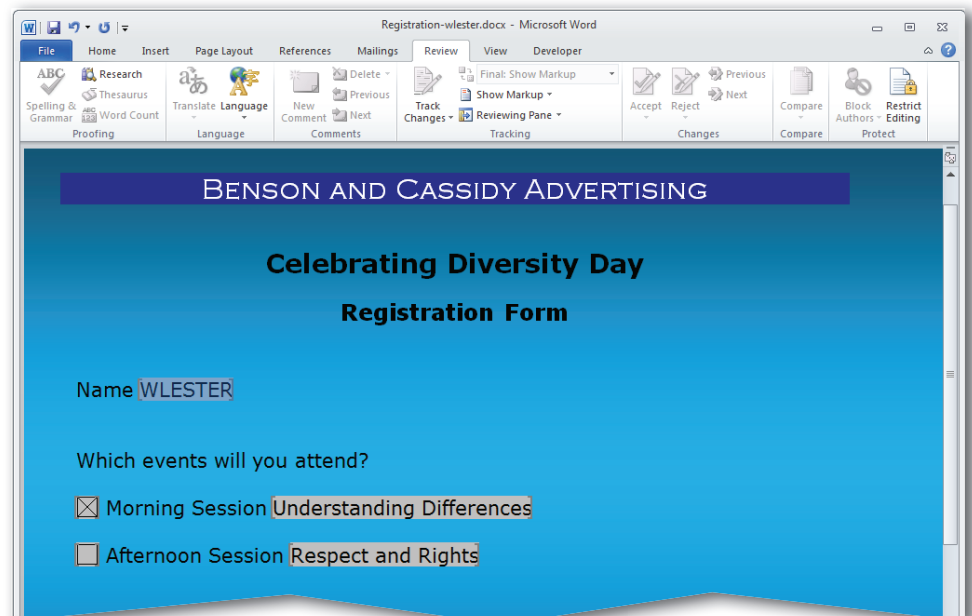
1. Open the data file **Results.docx**. Save as: Results-[your first initial and last name].

2. Choose **Page Layout> Page Background> Watermark**.

3. Select **Custom Watermark**. In the **Printed Watermark** dialog box, click **Text watermark**.

4. Click the **Text** drop-down arrow. Click **DRAFT** (see Figure 2.11). Click **OK**. Scroll down to the page numbered 2.

5. **CHECK** Your screen should look like Figure 2.12. Save your file.

➡ *Continue to the next exercise.*

Academic Skills

The term draft means that a document is not final. Once you have a draft of a report, you still need to revise and edit before you can consider it complete.

Tech Tip

Use the Quick Parts tool to create a watermark or select from a preformatted Building Blocks watermarks by selecting **Insert>Quick Parts> Building Blocks Organizer**.

EXERCISE 2-4
Add Watermarks to Documents

If you want a word such as DRAFT or CONFIDENTIAL to appear on every page of a document, you can add a watermark. A watermark appears behind text, and is transparent enough that it does not keep text from being readable. Watermarks allow you to indicate the status of a document. If you want to hide the watermark to quickly edit text, view the document in Draft View.

FIGURE 2.11 Printed Watermark dialog box
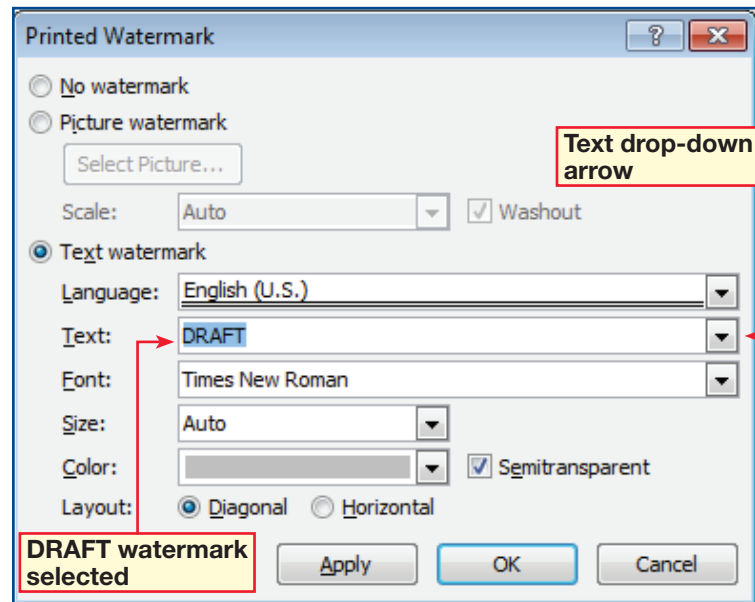
FIGURE 2.12 Watermark inserted into document

Add Page Borders

You can add page borders to enhance the appearance of a document. Borders can be added to all four sides of the document, or to one or more sides. In addition, you can change the line style, color, and thickness of borders to emphasize a page or section of your document.
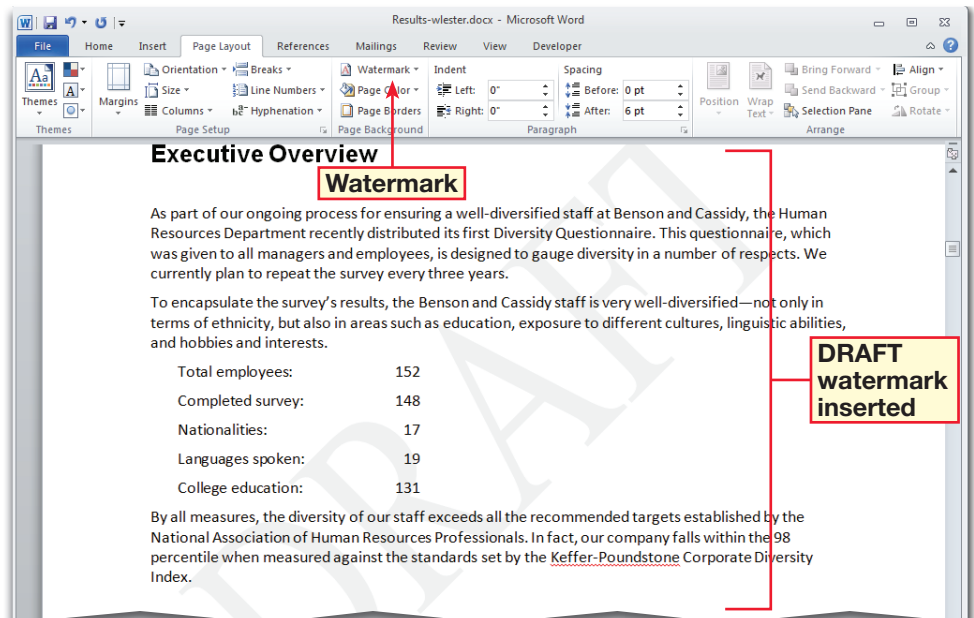
1 In your **Results** file, choose **Page Layout> Page Background>Page Borders** .

2 In the **Borders and Shading** dialog box, click the **Page Border** tab. Under **Setting**, click **Box** (see Figure 2.13).

3 Under **Width**, choose **1 pt**. Click **OK**.

4 Choose **File>Print**.

5 **CHECK** Your screen should look like Figure 2.14.

6 Click the **Home** tab to close **Print Preview**.

7 Save your file.

➡ *Continue to the next exercise.*

FIGURE 2.13 Borders and Shading dialog box
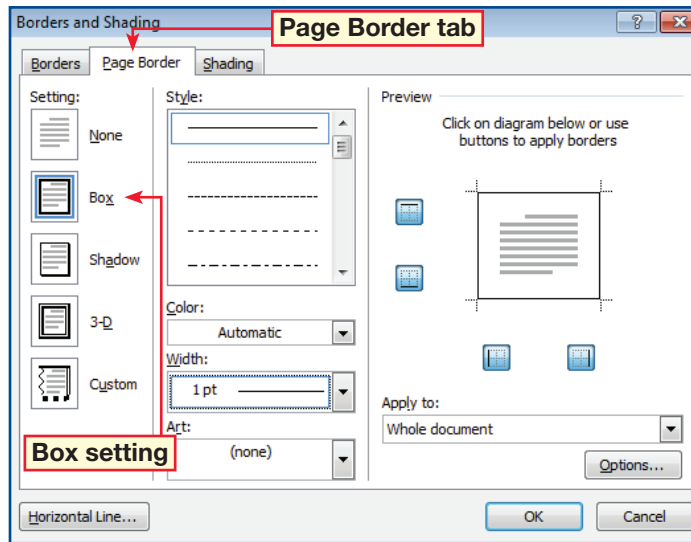
FIGURE 2.14 Border applied to document

Tech Tip

To add a border on only one side of a page, such as the top or bottom, click **Custom** in the **Borders and Shading** dialog box. Then, click where you want the border to appear.

You Should Know

To view a document in a new window, choose **View>Window>New Window**.
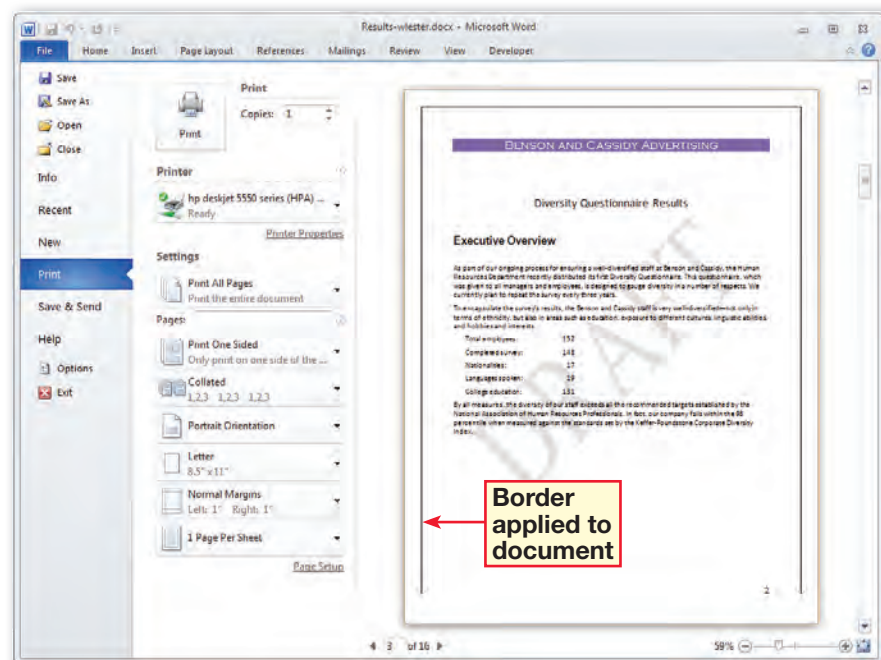
1 In your **Results** file, scroll to the page numbered 2. Choose **Page Layout> Themes> Themes** [Aa].

2 Under **Built-In**, click **Urban** (see Figure 2.15).

3 Choose **Home>Styles> Change Styles** [AA]. Select **Set as Default**.

4 Choose **File>New**. Double-click **Blank document**. Save the file as: Urban-[your first initial and last name].

5 In your **Urban** file, choose **Page Layout>Themes> Themes** [Aa]. **Urban** is now the default theme.

6 Select all the text on the page numbered 2 in your **Results** file. Click **Home> Clipboard>Copy** [📋].

7 In your **Urban** file, select **Home>Clipboard>Paste> Paste Special**. Select **Formatted Text (RTF)** from the list. Click **OK**. Click **Themes** [Aa] on the **Page Layout** tab. Select **Module**.

8 **ⓘCHECK** Your screen should look like Figure 2.16.

9 Click **Themes** [Aa]. Select **Reset to Theme from Template**. The theme is reset to **Urban**. Save and close your **Urban** file.

➡ *Continued on the next page.*

EXERCISE 2-6
Apply and Modify Themes

A <mark>theme</mark> is a set of fonts, colors, or effects that gives a document a unified look. You can apply a theme or create a custom theme by modifying an existing one. Themes work well with documents that are meant to be viewed on-screen or printed in color, but you can apply a theme to any document to give it a professional look.

FIGURE 2.15 Themes drop-down list
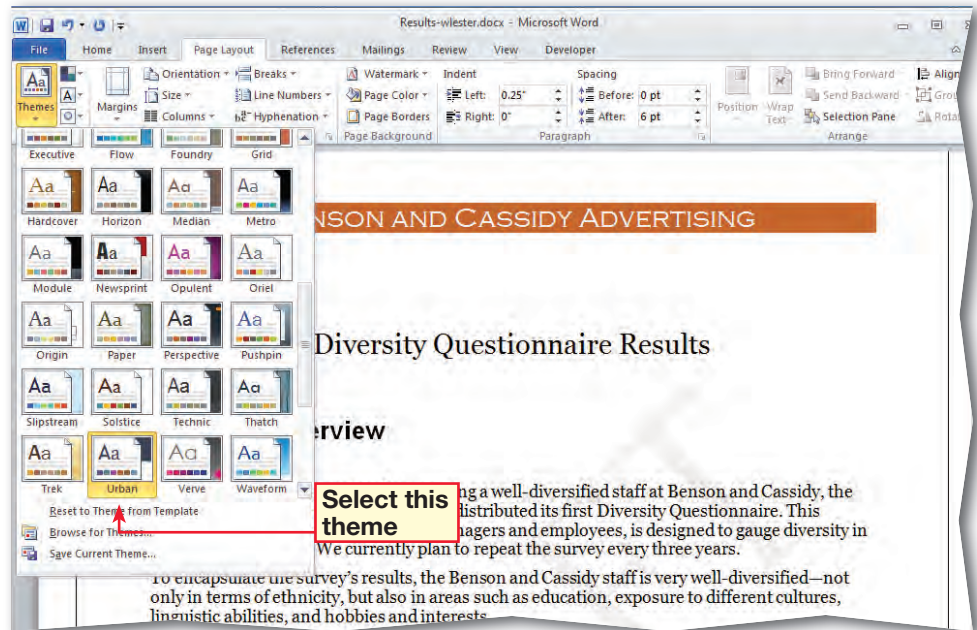
FIGURE 2.16 Theme set to Module

Apply and Modify Themes
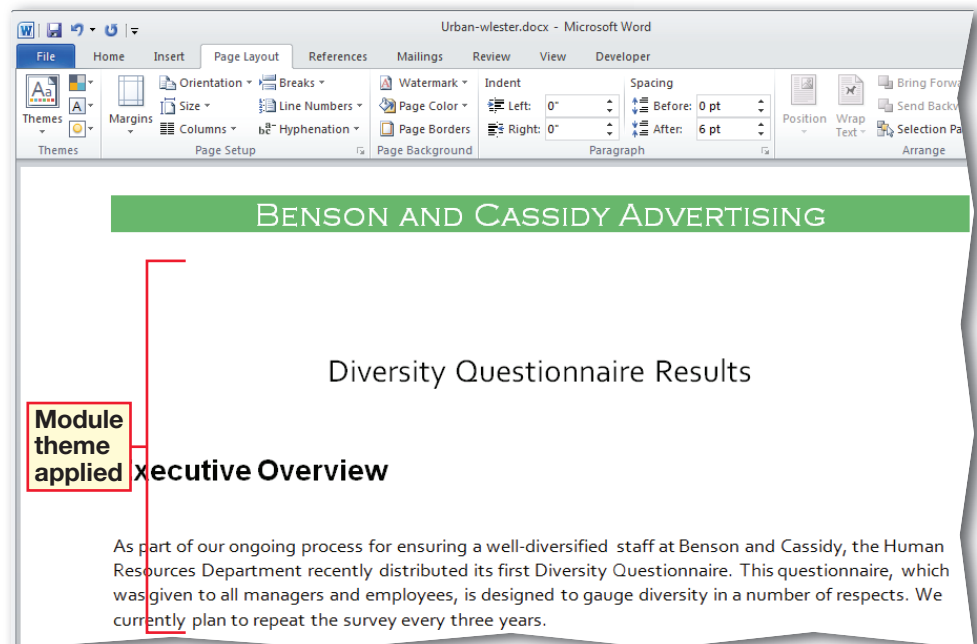
10 In your **Results** file, choose **Page Layout>Themes> Theme Colors** ⬛.

11 Select **Create New Theme Colors**. Under **Theme colors**, click the **Accent 2** button and change it to **Green** under **Standard Colors**.

12 Click **Accent 4** and change it to **Dark Red**. In the **Name** box, key: Diversity Questionnaire.

13 🅘**CHECK** Your screen should look like Figure 2.17. Click **Save**.

14 Click **Theme Colors** ⬛. The Diversity Questionnaire theme appears in the list.

15 In the **Themes** group, click **Theme Fonts** Ⓐ. Select **Create New Theme Fonts**.

16 Choose **Calibri** for the **Body font**. In the **Name** box, key: Diversity Questionnaire. Click **Save**.

17 🅘**CHECK** Your screen should look like Figure 2.18.

18 Click **Themes** Ⓐ. Select **Save Current Theme**. Name the theme: Diversity Questionnaire. Click **Save**. Save your file.

➥ *Continue to the next exercise.*

FIGURE 2.17 Create New Theme Colors dialog box

Accent 2 changed to Green

Accent 4 changed to Dark Red
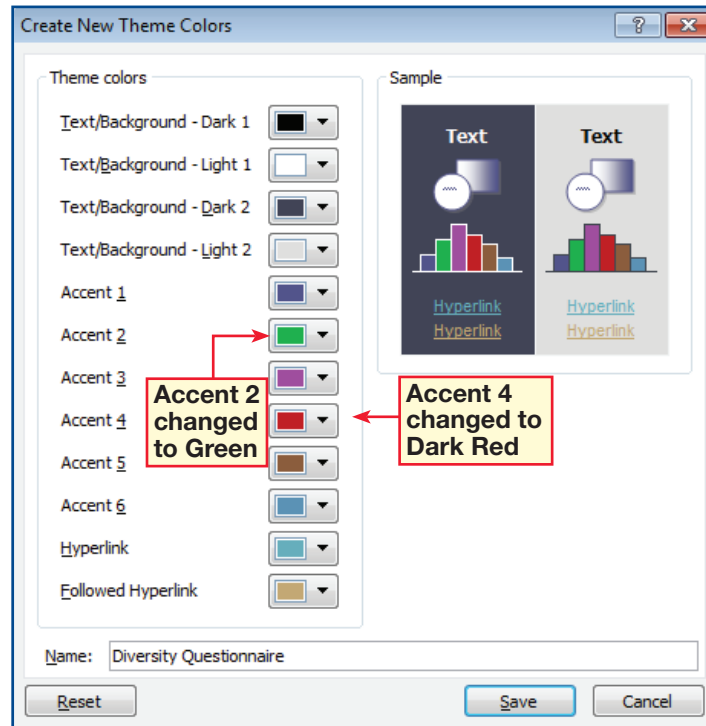
FIGURE 2.18 Diversity Questionnaire theme applied to document
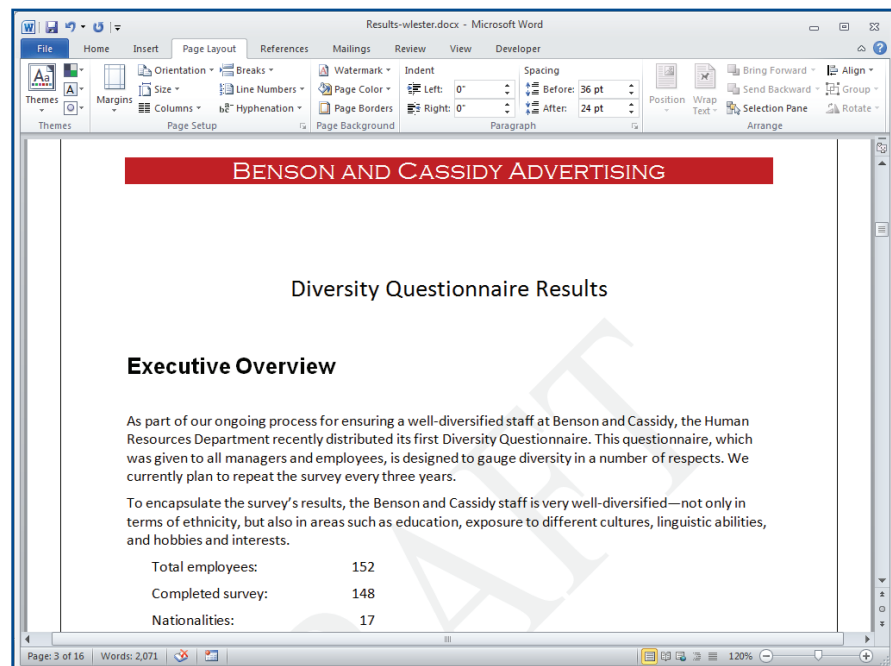
1. In your **Results** file, scroll to page 11 and click after the **Other Points of Interest** header.

2. Choose **Insert>Text> Quick Parts** . Select **Building Blocks Organizer**.

3. In the **Building Blocks Organizer**, click the **Name** header. The Building Blocks are sorted in alphabetical order by name. Click the **Category** header. Click the **Gallery** header.

4. With **Building Blocks** sorted by **Gallery**, note the galleries for cover pages, equations, quotes, footers, headers, and watermarks.

5. Scroll to the **Text Boxes** Building Blocks. Locate and click the **Conservative Sidebar** Building Block (see Figure 2.19).

6. Click **Insert**. A sidebar is inserted into the document.

7. Key the text shown in Figure 2.20 into the sidebar. Drag the sidebar down next to the paragraph under the **Other Points of Interest** header.

8. Save your file.

➡ *Continue to the next exercise.*

EXERCISE 2-7
Insert Building Blocks

Microsoft Word allows you to insert Building Blocks that can be saved with the Quick Parts tool to be reused in other documents. You can **minimize**, or cut down, the amount of time and effort you spend creating documents when you regularly use Building Blocks. For example, you can insert preformatted content, such as cover pages, text boxes, sidebars, and headers and footers, or save any new content that you create.

FIGURE 2.19 Building Blocks Organizer dialog box
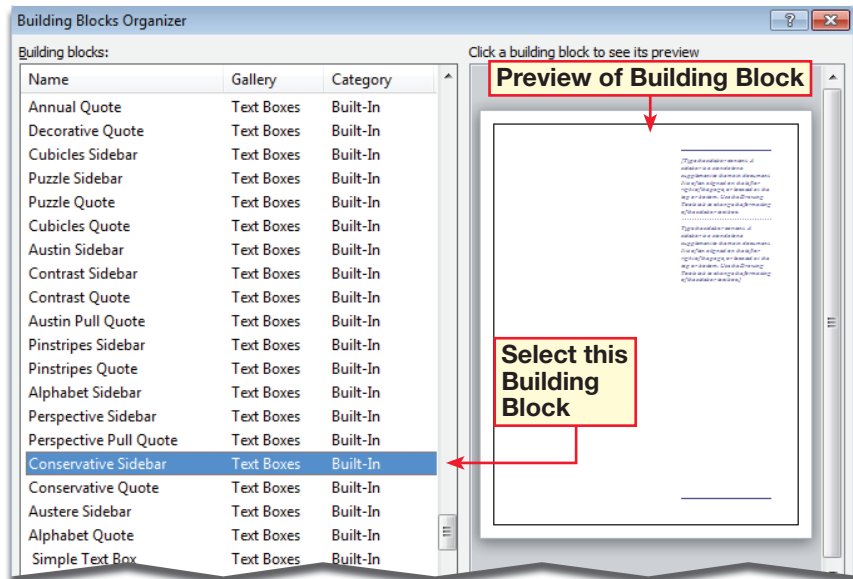
FIGURE 2.20 Sidebar inserted into document
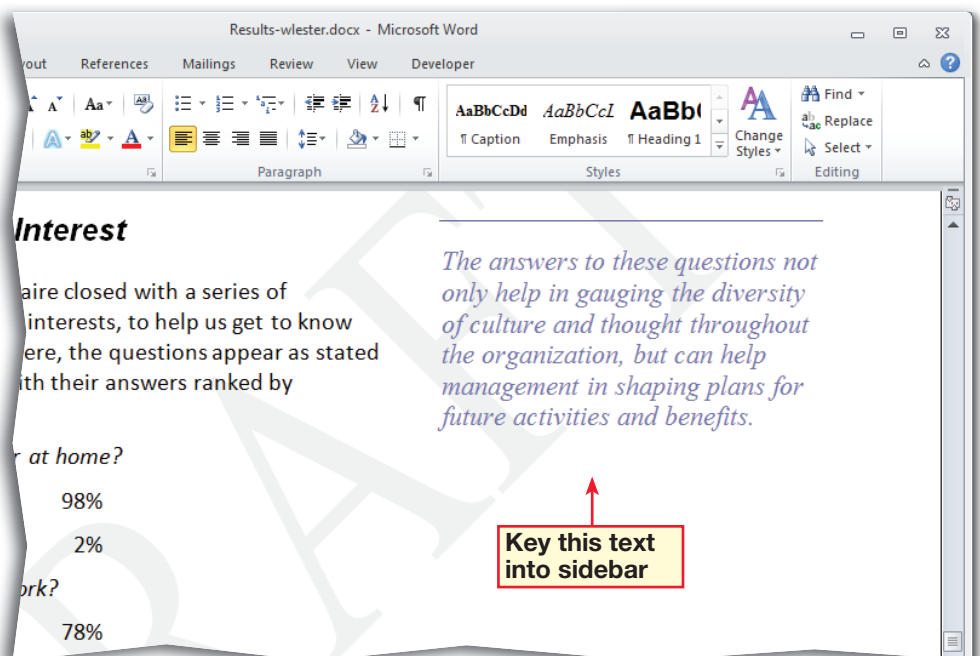
1 In your **Results** file, choose **Home>Paragraph> Show/Hide ¶**. Select the Benson and Cassidy logo on the page numbered 2. Include the paragraph symbol that appears after **Advertising**.

2 Choose **Insert>Text> Quick Parts**. Select **Save Selection to Quick Part Gallery** (see Figure 2.21).

3 In the **Create New Building Block** dialog box, in the **Name** box, key: Ad Logo. Click **OK**.

4 Choose **Home> Paragraph>Show/ Hide ¶**. Click under the logo. Choose **Insert> Text>Quick Parts**.

5 **CHECK** Your screen should look like Figure 2.22.

6 Click **Building Blocks Organizer**. Locate and click the **Ad Logo** Building Block you created. Click **Edit Properties**.

7 Click the **Category** drop-down arrow and select **Create New Category**. Key: Logo. Click **OK**.

➡ *Continued on the next page.*

EXERCISE 2-8
Create Building Blocks and Modify Their Properties

You can create new Building Blocks for commonly used items. You can change the properties of the ready-made Building Blocks. Likewise, the Building Blocks that you create can be modified. For example, you can create a custom letterhead, watermarks, or even headers and footers that include your company contact information, a mission statement, or even a company logo.

FIGURE 2.21 Save Selection to Quick Part Gallery

Save Selection to Quick Part Gallery
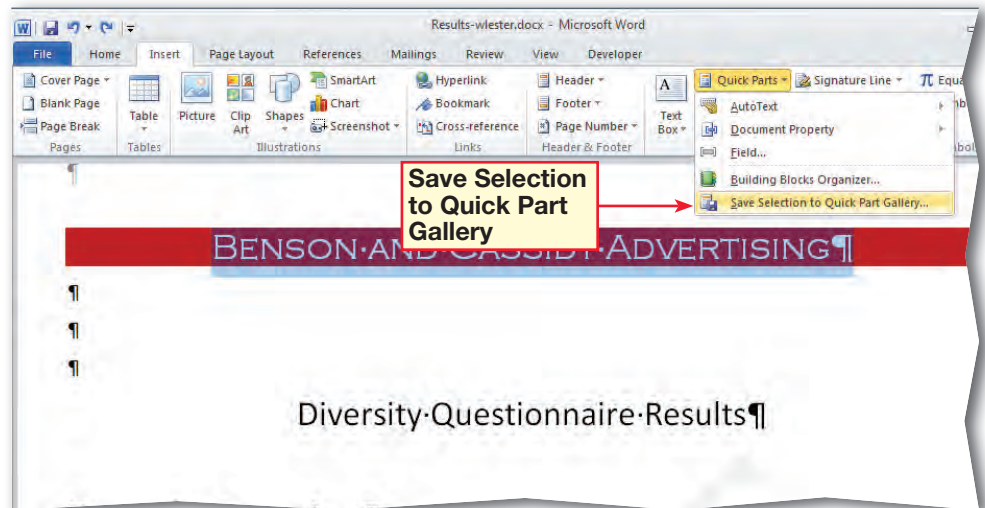
FIGURE 2.22 Logo added to Building Block General category

Ad Logo appears in the Quick Parts drop-down menu
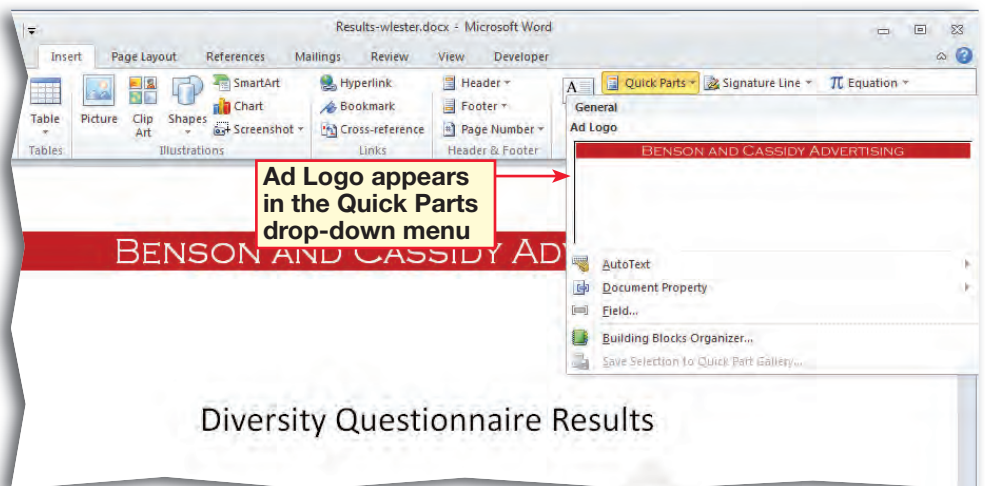
You Should Know

To delete a document's header or footer, choose **Insert>Header & Footer**, click **Header** or **Footer** and select **Remove Header** or **Remove Footer**.

8   In the **Description** box, key: Benson and Cassidy Advertising Logo. Click **OK**. Click **Yes**.

9   **ⓘCHECK** Your dialog box should look like Figure 2.23.

10 In the **Building Blocks Organizer**, click the **Exposure** header. Click **Insert**.

11 Click the **Pick the date** drop-down arrow. Select the month, day, year format.

12 Select the entire header. Choose **Design>Insert> Quick Parts** 🗐 . Select **Save Selection to Quick Part Gallery**.

13 In the **Name** box, key: Benson and Cassidy. Change the **Gallery** to **Headers**. Click **OK**. In your **Results** file, change **Investments** in the header to Advertising.

14 Press ⌨CTRL + A . Click **Quick Parts** 🗐 . Select **Save Selection to Quick Part Gallery**.

15 Repeat Step 13. Click **Yes**. Click **Close Header & Footer** ❎ . Save your file.

16 **ⓘCHECK** Your screen should look like Figure 2.24.

➡ *Continue to the next exercise.*

EXERCISE 2-8 (Continued)
Create Building Blocks and Modify Their Properties

FIGURE 2.23 Ad Logo changed
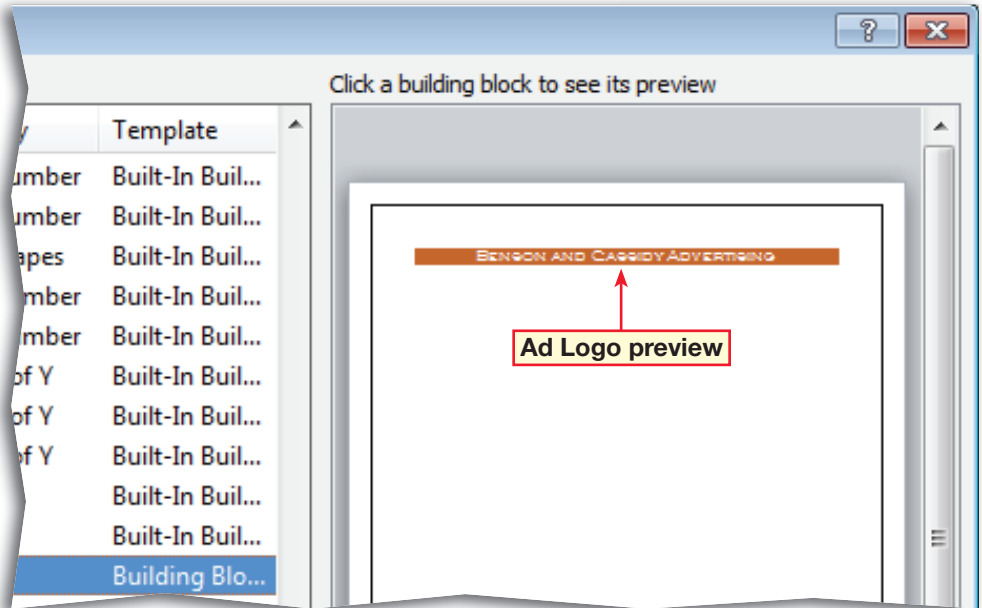
FIGURE 2.24 Header added
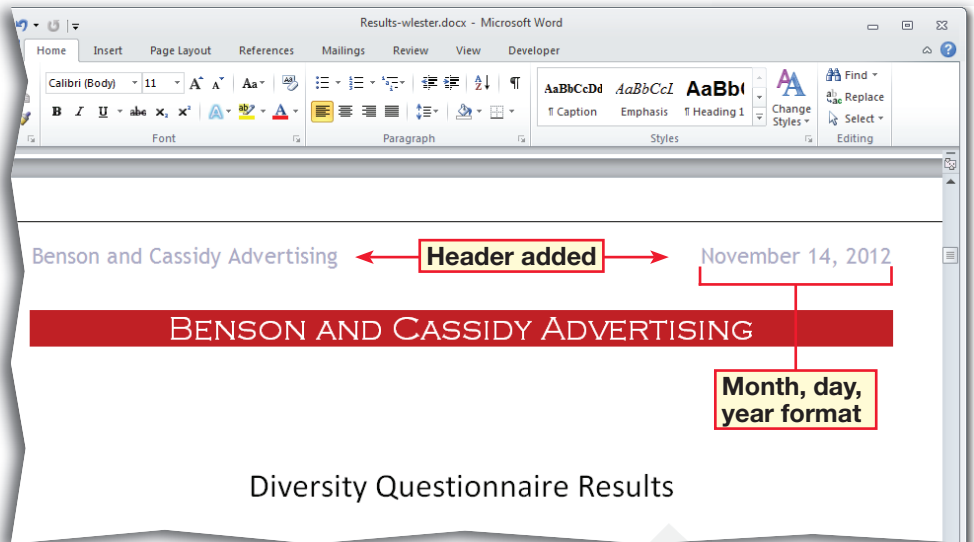
You Should Know

If you commonly write and reuse equations in documents, you can create Building Bocks for these equations. To construct a Building Block for an equation, select the equation, choose **Insert>Text>Quick Parts** and click **Save Selection to Quick Part Gallery**.

1 In your **Results** file, choose **File>New**.

2 In the **Office.com Templates** search box, key: Questionnaire. Press ENTER. Office displays free templates that you can download directly to your computer from within Office.

3 Choose **Save & Send>Change File Type**. Under **Change File Type**, select **Template (*.dotx)**. Click **Save As**.

4 In the **File name** box, key: Results-Template-[your first initial and last name]. See Figure 2.25.) Click **Save**.

5 **iCHECK** Your screen should look like Figure 2.26.

6 Close the template file. Note that Microsoft Word automatically closes your **Results** file.

→ *Continue to the next exercise.*

Academic Skills

Templates are useful for memos and business reports. You can also use a template in your academic assignments. A template can be especially helpful if your teacher requires a specific format, such as MLA style.

EXERCISE 2-9
Save a Document As a Template

A template is a guide that contains the formatting of a document. You can use built-in Office templates on your computer, download templates from the web, or create your own templates based on an existing document or template. When you create a document based on a template, Word opens a copy of the template, retaining the formatting and text. You can make any changes you want to the copy of the file. When you save the document as a .docx or .docm file, the original template file does not change.

FIGURE 2.25 Save As dialog box

New file name

.dotx extension
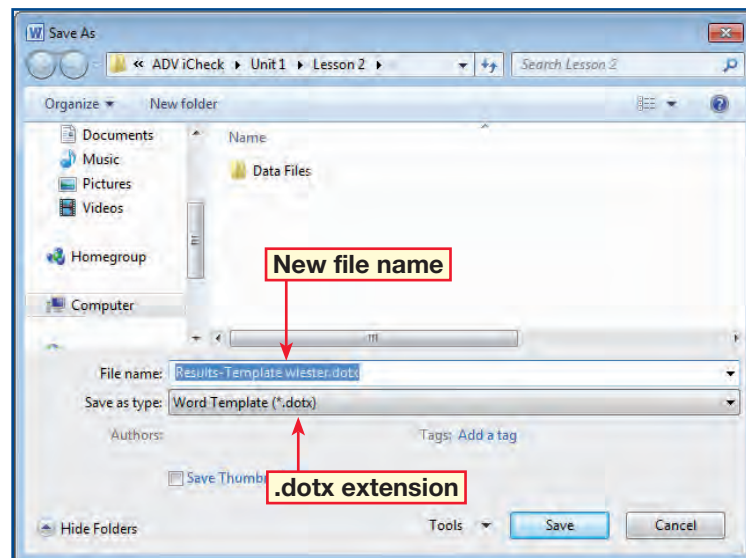
FIGURE 2.26 File saved as a Word template

Word template (.dotx) file extension

Benson and Cassidy Advertising   November

BENSON AND CASSIDY ADVERTISING

Diversity Questionnaire Results
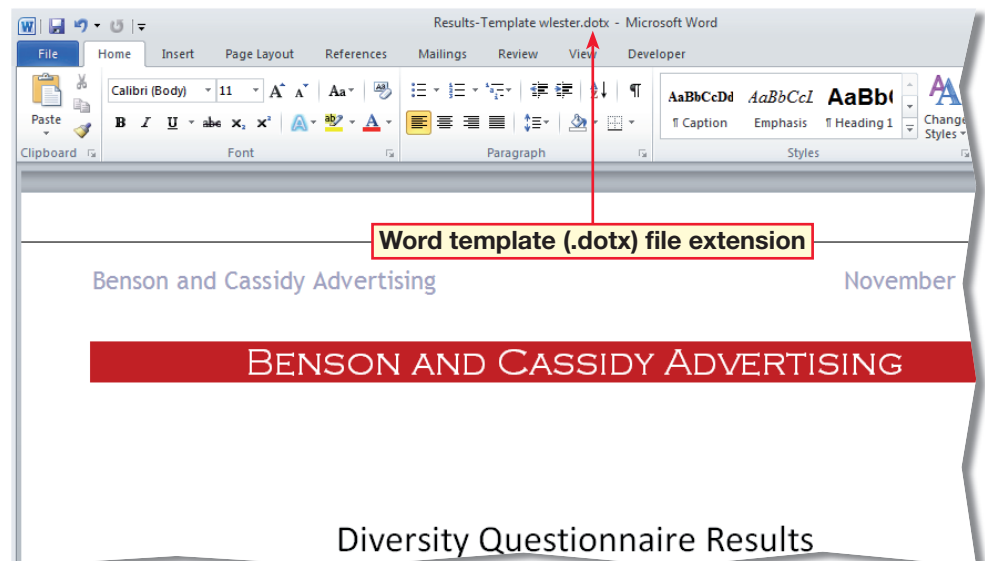
① Locate and open your **Results** file. Position the insertion point on the blank line below the pie chart on Page 5.

② Choose **References> Captions>Insert Caption** ▣ .

③ In the **Caption** dialog box, under **Caption**, after **Figure 1**, press [SPACE]. Key: -Education Levels of Employees.

④ **ℹCHECK** Your dialog box should look like Figure 2.27.

⑤ Click **OK**.

⑥ **ℹCHECK** Your screen should look like Figure 2.28.

⑦ Save your file.

➡ *Continue to the next exercise.*

EXERCISE 2-10
Insert Captions and Format Caption Numbering

You can add a label, called a ==caption==, that describes a figure or table. Captions are automatically numbered sequentially throughout your document. They allow you to organize documents with several illustrations or pictures so that readers can follow the discussion. You can also use the Insert Caption feature to add captions to Clip Art illustrations, photos, SmartArt graphics, and other figures in your document.

FIGURE 2.27 Caption dialog box
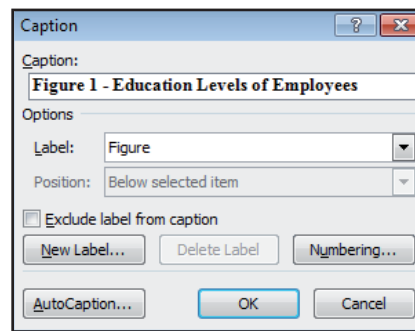
FIGURE 2.28 Caption automatically numbered
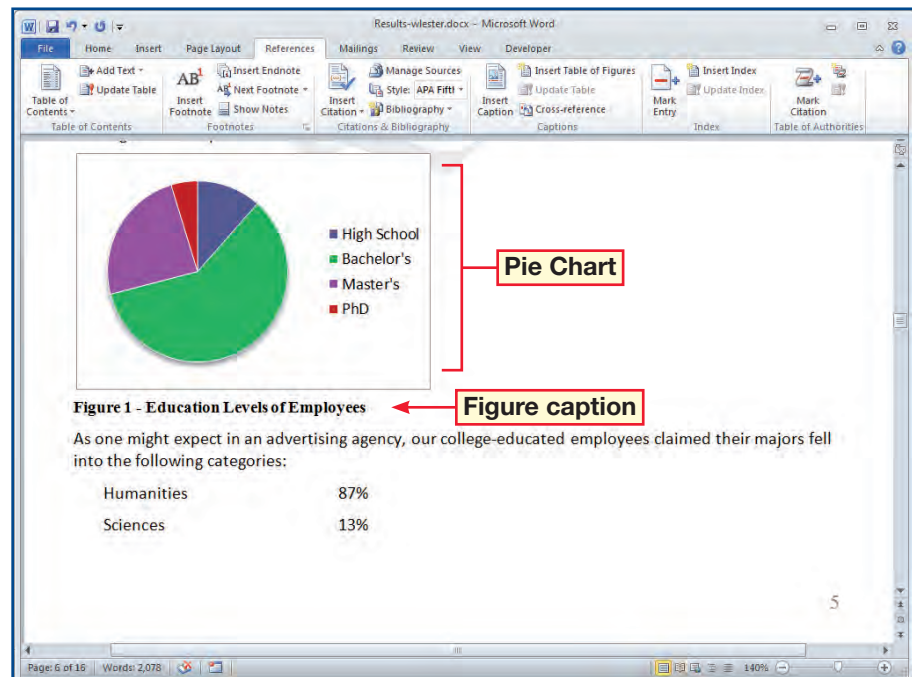
Academic Skills

Although Word allows you to identify tables and figures with letters, MLA and APA styles require you to use numbers.

1. In your **Results** file, turn on **Show/Hide** ¶ . Click the second blank line below **Table of Contents** on the second numbered page.

2. Choose **References> Table of Contents>Table of Contents** 📄 . Select **Insert Table of Contents**.

3. **ⓘCHECK** Your screen should look like Figure 2.29. Note that the settings are the same. Click **OK**.

4. On page numbered 4, click in the **Results Questionnaire** and delete the word **Questionnaire**.

5. On the second unnumbered page, right-click in the table of contents. Click **Update Field**. In the dialog box, click **Update entire table**. Click **OK**.

6. Turn the **Ruler** on. Select the table of contents and double-click the **Left Tab** on the ruler.

7. In the **Tabs** dialog box, in the **Tab stop position** box, click **Clear**. Key: 5. Under **Leader**, click **2.....**. Click **Set**. Click **OK**.

8. **ⓘCHECK** Your screen should look like Figure 2.30. Save your file.

➡ *Continue to the next exercise.*

EXERCISE 2-11
Create and Modify a Table of Contents

You can **generate**, or create, a table of contents that lists the headings in the document and the page number where each appears. If your document does not have headings already, you will need to AutoFormat your document to create them. You can update the table of contents automatically if the wording or location of a heading changes, or if headings are added or deleted. You can also insert formatting between the heading and the page number, such as a line or a row of dots. This formatting is called a **tab leader**. Use the Table of Contents dialog box to set the number of levels and alignment that you want in your table, and to modify the styles for your table entries.

FIGURE 2.29 Table of Contents dialog box
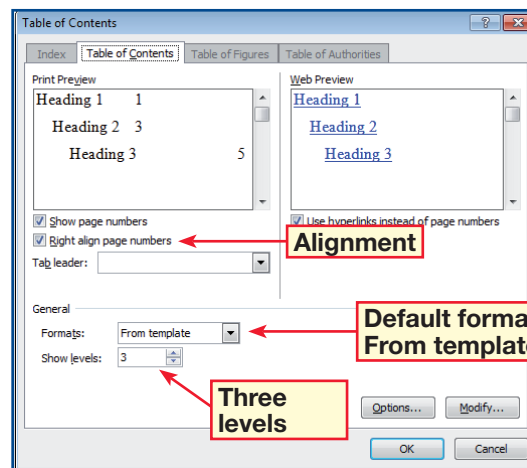
FIGURE 2.30 Updated table of contents
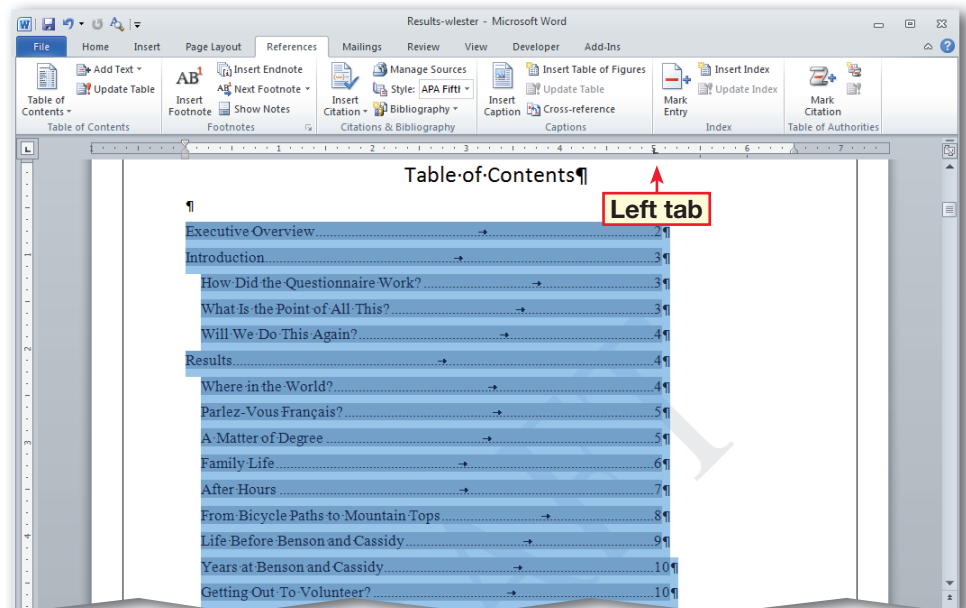
1. In your **Results** file, on Page 14, click in the second blank line below **Table of Figures**.

2. Choose **References> Captions>Insert Table of Figures** 📑.

3. **ⓘCHECK** Your dialog box should look like Figure 2.31.

4. In the **Table of Figures** dialog box, click **OK**. The table of figures appears in the document.

5. In the pie chart caption on Page 5, delete **Levels**.

6. On Page 10, under the column chart, select the caption (without the paragraph marker). Press [DELETE]. Click **Insert Caption** 📑. After Figure 2, press [SPACE]. Key: - Years at Benson and Cassidy. Click **OK**.

7. On Page 14, right-click the table of figures. Click **Update Field**.

8. In the **Update Table of Figures** dialog box, click **Update entire table**. Click **OK**.

9. **ⓘCHECK** Your screen should look like Figure 2.32.

10. Save your file.

➡ *Continue to the next exercise.*

EXERCISE 2-12
Create and Modify a Table of Figures

You can generate a ==table of figures== that lists all of the figures in your document. If the name or location of a figure changes, the table of figures will be corrected when you update the table. Just as with a table of contents, you can set levels, set the alignment, add and format tab leaders, and modify styles.

FIGURE 2.31 Table of Figures dialog box
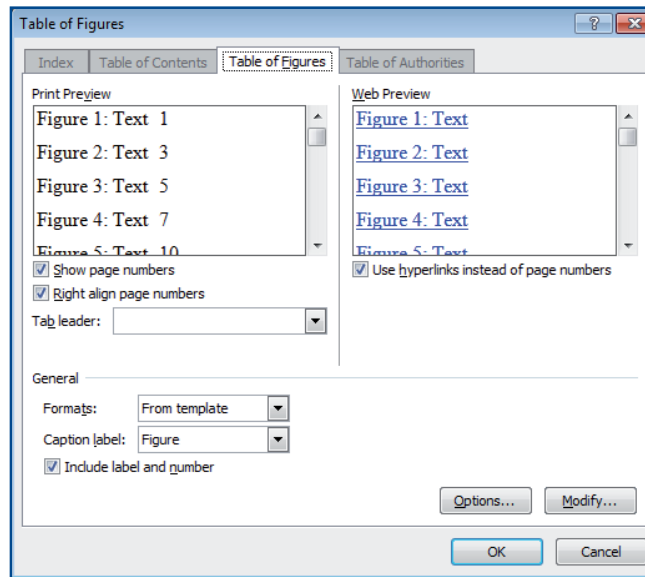
FIGURE 2.32 Updated table of figures
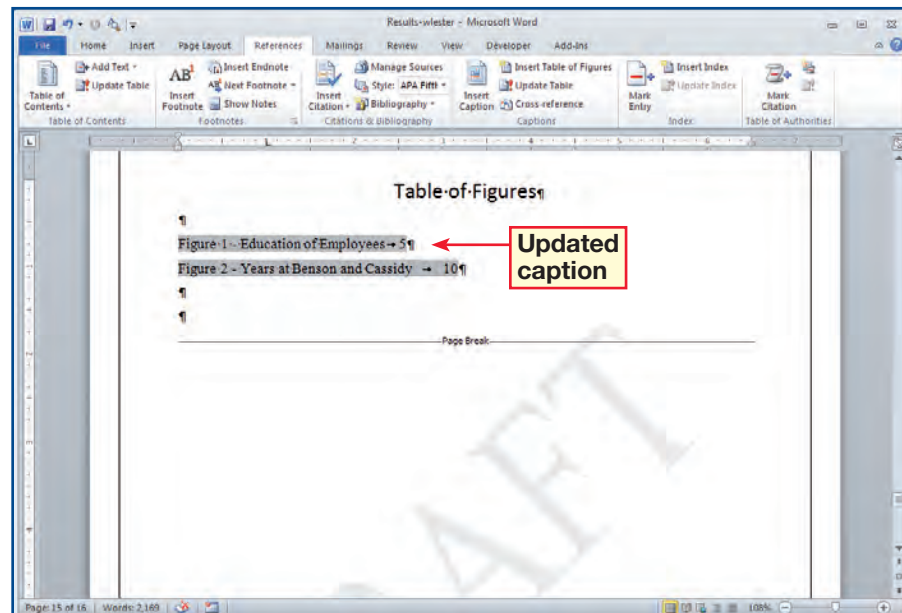
1 In your **Results** file, on Page 13, click two lines below **Table of Authorities**.

2 Choose **References> Table of Authorities> Insert Table of Authorities** 📑.

3 In the dialog box, click **OK**.

4 On Page 9, select the text **Drummond v. Wong**. Select **References>Table of Authorities>Mark Citation** 📑. In the dialog box, click **Mark** (see Figure 2.33). Click **Close**.

5 On Page 13, right-click the table of authorities. Click **Update Field** 📑.

6 🅘**CHECK** Your screen should look like Figure 2.34.

7 Select the entire **Table of Authorities** (including header). Choose **Home> Clipboard>Cut** ✂.

8 Press 𝖣𝖤𝖫𝖤𝖳𝖤 five times. Click in the second blank line below the table of figures. Choose **Insert> Pages>Blank Page** 📄.

9 On the **Home** tab, click the **Clipboard Dialog Box Launcher**. Click **Paste All** 📋. Close the Clipboard and save.

➡ *Continue to the next exercise.*

EXERCISE 2-13
Create and Modify a Table of Authorities

Legal documents often include references to legal cases, statutes, and rules. You can create a list of these legal references with a ==table of authorities==. An authorities field is inserted after each of these references. If the information in the authorities field or the location of a reference changes, the table of authorities updates when you update the table.

FIGURE 2.33 Mark Citation dialog box
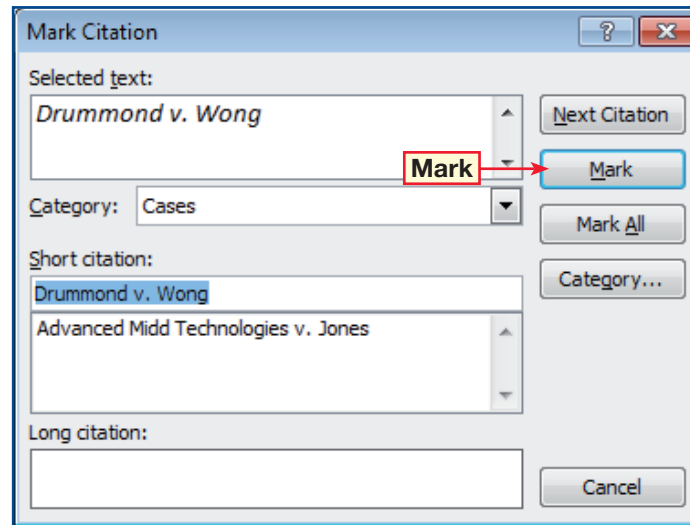
FIGURE 2.34 Table of authorities inserted into document
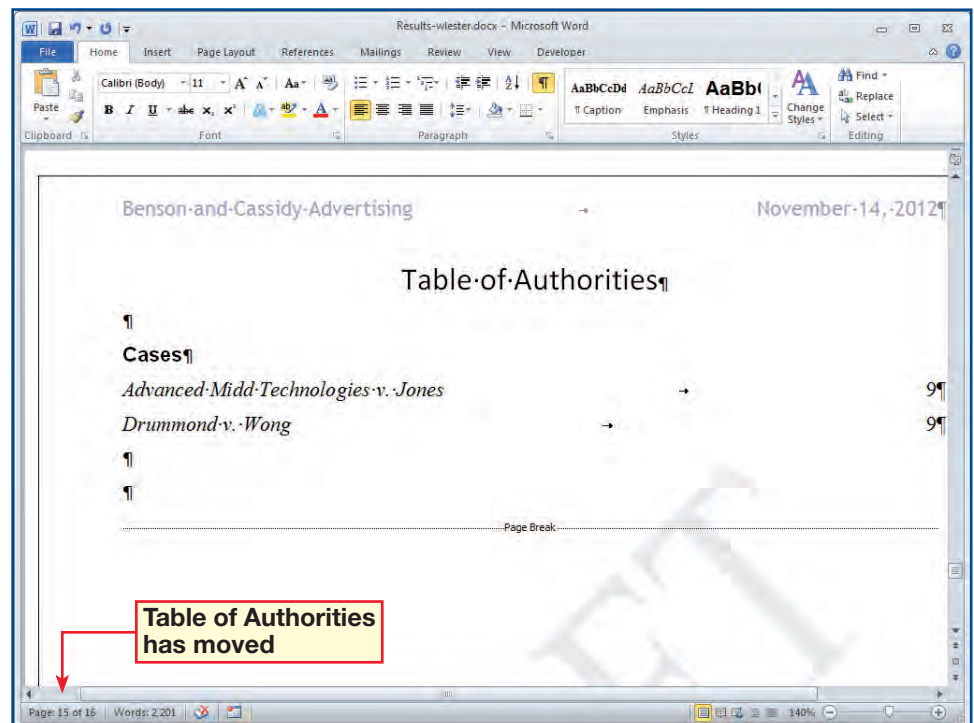
1. On the page numbered 2, in the first paragraph, select the word **questionnaire**. Choose **References> Index>Mark Entry** 📑.

2. In the **Mark Index Entry** dialog box, click **Mark All** (see Figure 2.35).

3. Under **Options**, select **Page range**. Key: 1-16. Click **Close**.

4. Deselect the word questionnaire. Click **Mark Entry** again. In the **Mark Index Entry** dialog box, under **Index**, in the **Main entry** box, key: birthplaces. Click **Mark**. Click **Close**.

5. In the paragraph beginning with **Our employees** on Page 4, select **traveled**. Click **Mark Entry** 📑.

6. In the **Mark Index Entry** dialog box, under **Index**, in the **Main entry** box, key: travel.

7. Under **Options**, click **Cross-reference**. After **See**, key: hobbies. Click **Mark**. Click **Close**.

8. **ⓘCHECK** Your screen should look like Figure 2.36.

➡ *Continued on the next page.*

EXERCISE 2-14
Create and Modify an Index

As you create a document, you can mark terms that will be listed in the ==index==. Located at the end of the document, the index lists the pages where marked terms appear. If you want to refer to another index entry, you can use a ==cross-reference==, which indicates the name of the entry to which the user should be directed. If the location of a marked term changes, you can update the index to show the correct page numbers.

FIGURE 2.35 Mark Index Entry dialog box
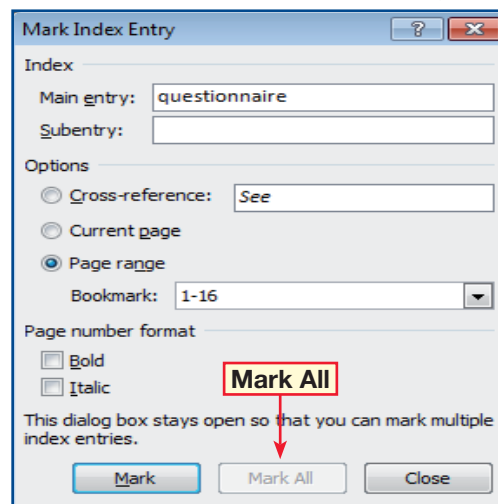
FIGURE 2.36 Entry cross-referenced for index
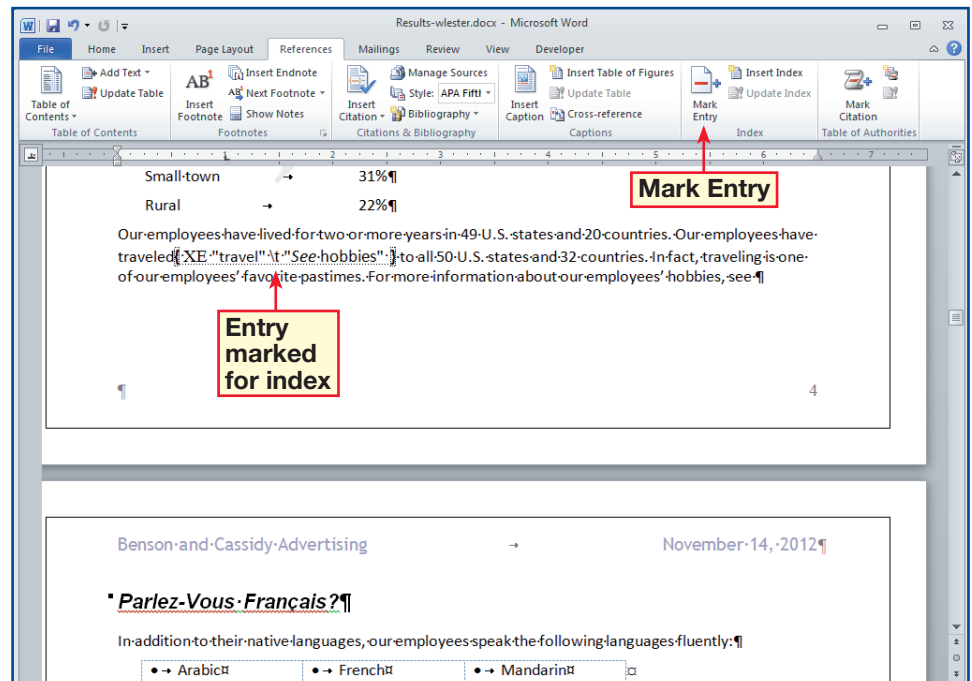
9 In the same paragraph, select **hobbies**. Click **Mark Entry**. In the **Mark Index Entry** dialog box, click **Mark All**. Click **Close**.

10 In the first paragraph on Page 5, select the first instance of **languages**. Click **Mark Entry**. In the **Main Entry** box, key: language.

11 Under **Options**, click **Cross-reference**. After **See**, key: birthplaces, hobbies. Click **Mark**. Click **Close**.

12 **i CHECK** Your screen should look like Figure 2.37.

13 On Page 15, click below the **Index** header. Choose **References>Index> Insert Index**.

14 In the **Index** dialog box, click the **Columns** drop-down arrow. Set the number of columns to **1**. Click **OK**. Click **Show/Hide** ¶.

15 **i CHECK** Your screen should look like Figure 2.38.

16 Save and close your file.

➡ *Continued to the next exercise.*

EXERCISE 2-14 (Continued)
Create and Modify an Index

FIGURE 2.37 Entry marked for index

Entry marked/ cross-referenced for index
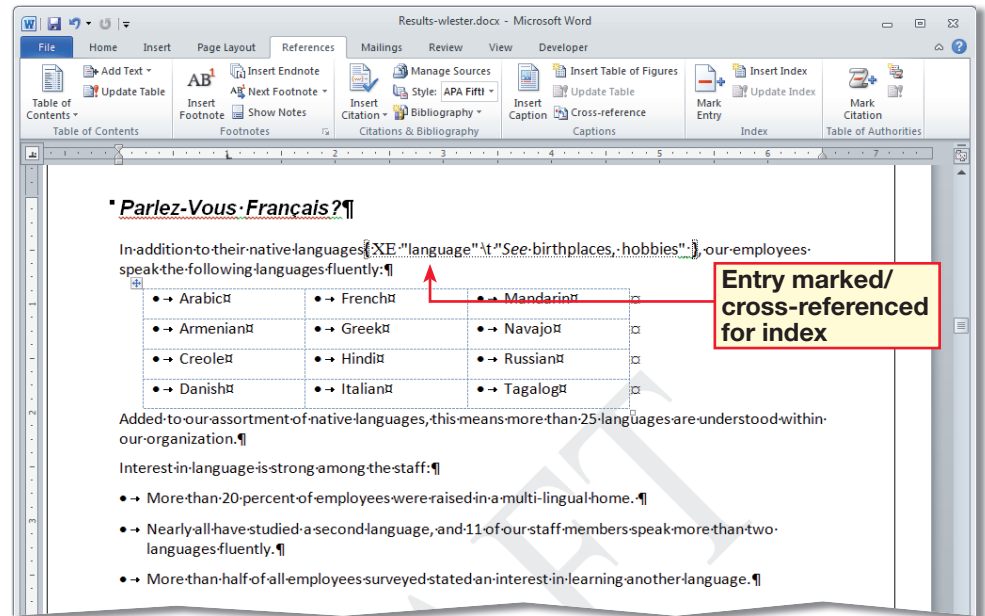
FIGURE 2.38 Index inserted into document

Index updated
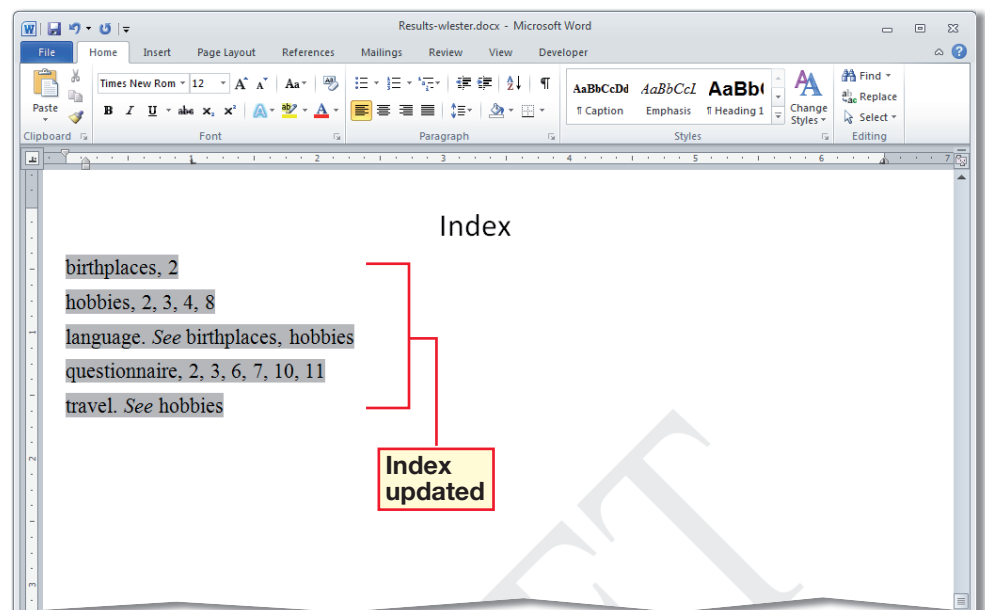
Microsoft Office 2010

In Microsoft Word 2010, you can use the **Mark Entry** button to add text to the index of a document.

EXERCISE 2-15
Use the Navigation Pane

Another great way to navigate and search through large documents is to use the Navigation Pane. The Navigation Pane, new in Microsoft Word 2010, appears when you select the Find tool and enables you to navigate through a document by heading, by page, or by other text or objects. When the Navigation Pane is open, it allows you to view a document's headings and pages in a clear, top-to-bottom format, making it easier to locate and move sections of content by dragging headings. You can also set the Find and Replace options to help you find and replace specific formatting or special characters in your Word documents.

1 Open the data file **Handbook.docx**.

2 Save the file as: Handbook-[your first initial and last name].

3 Choose **Home>Editing> Find** 🔍. The **Navigation Pane** opens.

4 In the **Navigation Pane**, on the right side of the search box, click **Find Options** 🔍.

5 **✓CHECK** Your screen should look like Figure 2.39. Note the different **Find** options listed in the menu. Select **Graphics**. Word navigates to the map graphic.

6 Click ✖ to end your search. Click **Find Options** 🔍 and select **Tables**. Click ✖ to end your search. Click **Find Options** 🔍 again. Select **Footnotes/Endnotes**.

7 Click ✖ to end your search.

8 Under the search box, click **Browse the headings in your document** 📄.

9 **✓CHECK** Your screen should look like Figure 2.40.

FIGURE 2.39 Find Options in Navigation Pane
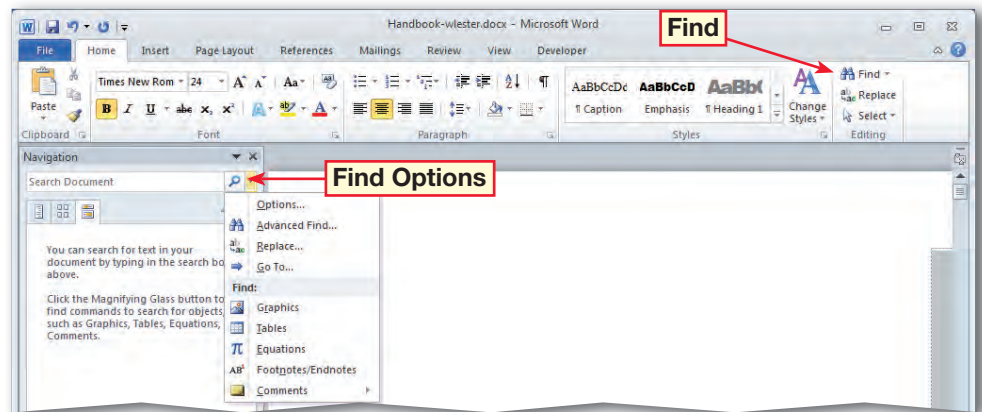
FIGURE 2.40 Browsing the headings in a document

EXERCISE 2-15   (Continued)
Use the Navigation Pane

FIGURE 2.41 Search results for benefits
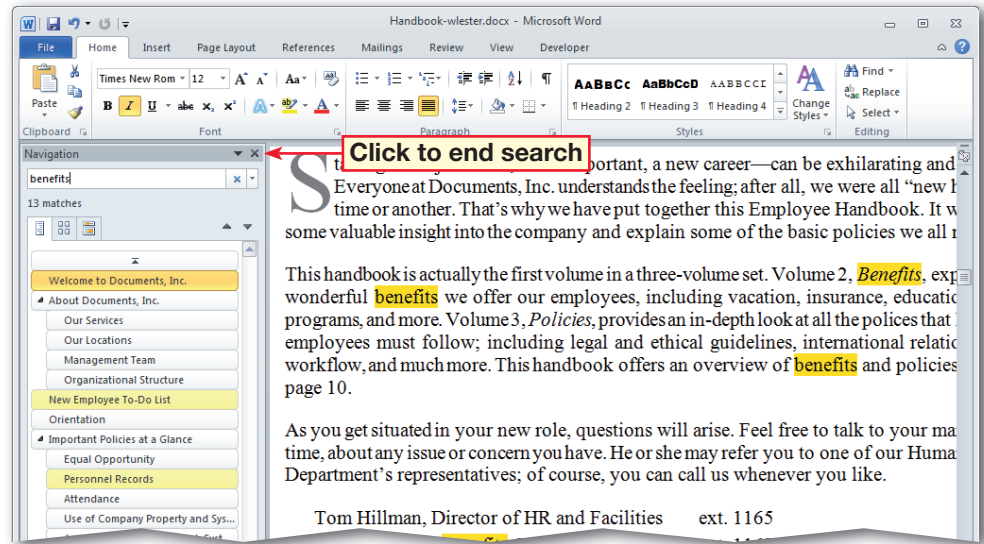
FIGURE 2.42 Sections moved to new location in document

10 In the **Navigation Pane**, click in the search box. Key: benefits.

11 **CHECK** Your screen should look like Figure 2.41. Click ✕ to end the search.

12 Click **Browse the pages in your document** ▦. In the **Navigation Pane**, scroll to and click the Page 10 thumbnail.

13 Click **Browse the headings in your document** ▤. In the **Navigation Pane**, under the heading **Important Policies at a Glance**, click on the heading **Personnel Records** and drag it down below the heading that begins with **Appropriate use of Network** in the same section. Release.

14 Click on the **Attendance** heading and drag it down under **Personnel Records**.

15 **CHECK** Your screen should look similar to Figure 2.42.

➡ *Continued on the next page.*

Tech Tip

The **Navigation Pane** can also be turned on through the **Show** group on the **View** tab.

16 Deselect the text. Click **Find Options** 🔍 and select **Replace**.

17 In the **Find and Replace** dialog box, in the **Find what** box, key a hyphen (-). Click **More**, if necessary. Click **Format** (near the bottom) and choose **Style**. In the **Find Style** dialog box, in the **Find what style** list, select **Footnote Text**. Click **OK**.

18 Click in the **Replace with** box. Click **Format** (near the bottom) and choose **Style**. In the **Replace Style** dialog box, select **Footnote Text**. Click **OK**. Click **Special** and select **En Dash**.

19 **iCHECK** Your screen should look like Figure 2.43.

20 Click **Replace All**. Click **OK**. Word has made two changes to the footnotes in your document (see Figure 2.44). Close the **Find and Replace** dialog box.

21 Save and close your file

➡ *Continue to the next exercise.*

FIGURE 2.43 Options in Find and Replace dialog box

Key hyphen here

Special

Format
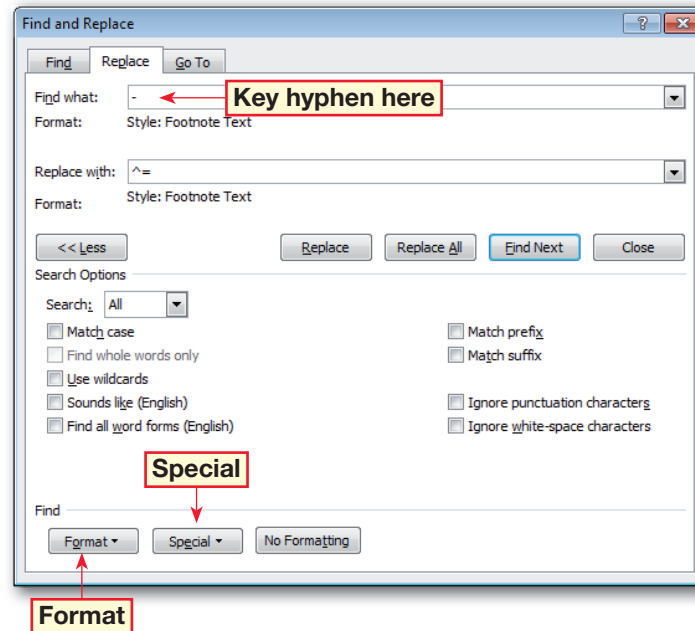
FIGURE 2.44 Hyphen replaced with en dash

En dash
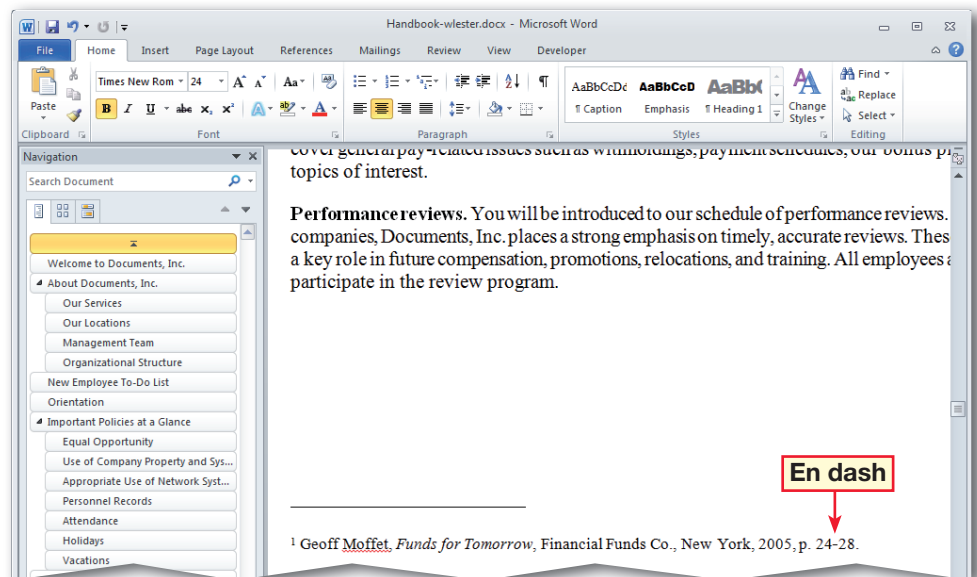
You Should Know

To create navigation tabs by applying heading styles, click the **Home** tab, select the text to which you want to apply a heading style, click **More** in the **Styles** group, and select a heading style.

1. Open your **Handbook** file.

2. Save the file as: Handbook Outline-[your first initial and last name].

3. In your **Handbook Outline** file, choose **View> Document Views> Outline**. The **Outlining** tab appears.

4. Choose **Outlining>Outline Tools** and click the **Show Level** drop-down arrow. Select **Level 1**.

5. Double-click the plus sign in front of the **Welcome to Documents, Inc.** header to expand the section.

6. Choose **Outlining>Master Document>Show Document** [icon].

7. **CHECK** Your screen should look like Figure 2.45. Note the **Master Document** group expands to add new commands.

8. With the **Welcome to Documents, Inc.** section still selected, choose **Outlining>Master Document>Create** [icon].

Continued on the next page.

EXERCISE 2-16
Use Master and Subdocuments

Microsoft Word 2010 allows you to quickly reorganize a lengthy document by viewing the document as an outline and using the Outline Tools. Word's Outlining tab appears when you select Outline View and allows you to quickly see and change the structure of a document, making outline creation and editing much easier. Outline View also allows you to use a master document to set up, rearrange, and manage a long document by dividing it into subdocuments, or smaller, more manageable parts. This is useful when working in a multipart document, such as a book or employee manual that might have several chapters or sections. You can also combine separate parts, or subdocuments, into one master document.

FIGURE 2.45 Welcome to Documents, Inc. section expanded
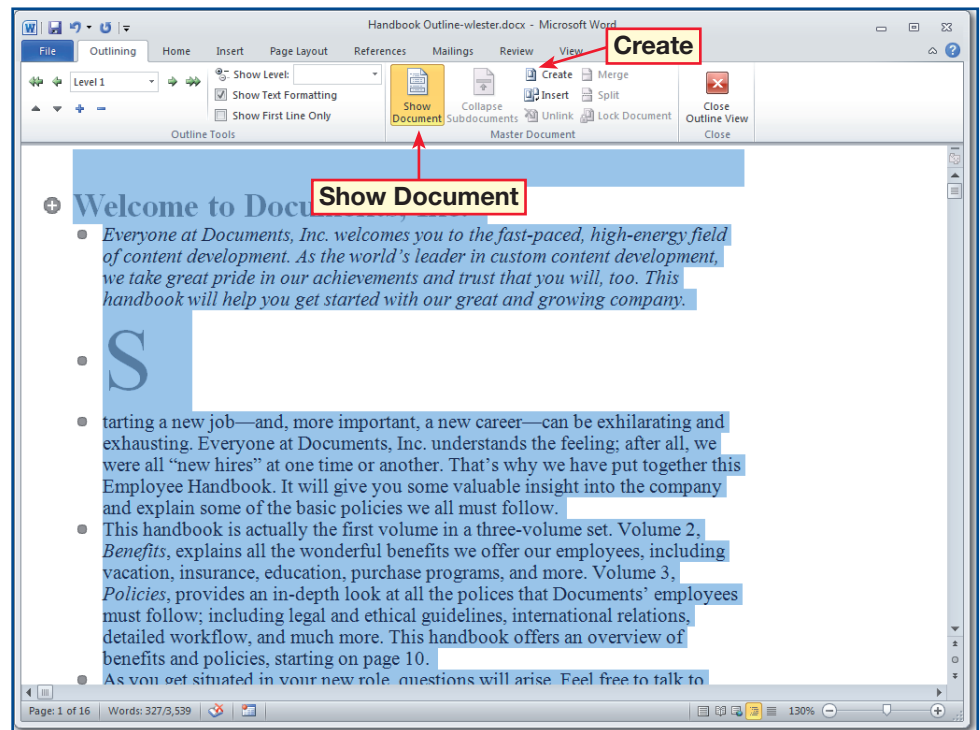
Tech Tip

You should create and designate a folder to store your master and subdocuments. If you want to use existing files as subdocuments, you should move these into the designated folder.

9 The section is turned into a subdocument to the master document. Click **Collapse Subdocuments**. Click **OK**.

10 Scroll down under the **Table of Contents** header. A link appears where the **Welcome to Documents, Inc.** section was.

11 Press CTRL and click the link.

12 iCHECK Your screen should look like Figure 2.46. Scroll down, if necessary. Word opens the subdocument that you created out of the **Welcome to Documents, Inc.** section. Note that Word assigned a file name to the subdocument based on the first characters of the subdocument's heading in the master document outline.

13 Close the **Welcome to Documents.docx** file.

14 Save and close your **Handbook Outline** file.

FIGURE 2.46 New subdocument created

Subdocument name automatically assigned based on heading
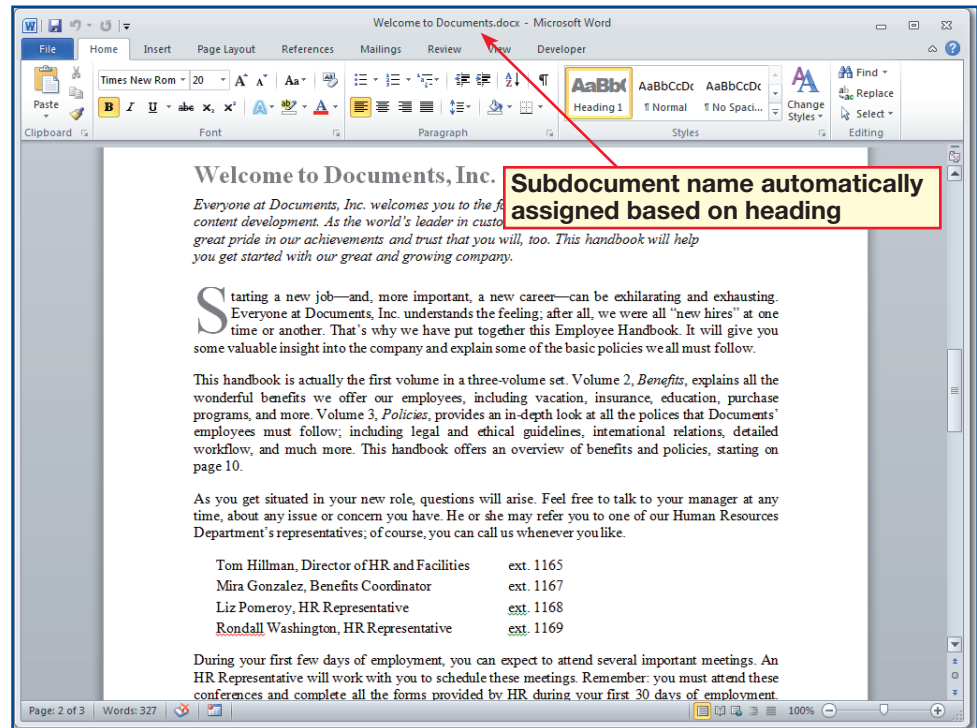
You Should Know

To move a subdocument to a new location, click the subdocument's icon in the master document's outline and drag the icon to a new location.

Writing MATTERS

Technical Documents

H ow does your new cellphone work? What are the features of your voice mail system? How has the business you invested in performed over the last three years? To answer these questions, you may need to consult a technical document.

What Is Technical Writing?

Technical writing is not always writing about computers and technology! The word *technical* refers to any topic that requires specialized knowledge. You have probably already read one type of technical document: instructions. Instructions explain how to do something or how to operate a device or program.

Elements of a Technical Document

Here are some elements of a well-crafted technical document:

- The information is factual and detailed.
- It includes graphics, such as diagrams, charts, and graphs.
- It uses headings, bulleted lists, and other forms of organization. Formatting is the key to technical writing. Using headings and bullets helps to break information into smaller pieces that are easier for readers to understand.
- Its sources are well documented. Look for citations to information from books or Internet resources.

A good technical document must be well researched.

SKILLBUILDER

1. **State** What is the purpose of writing a technical document?
2. **Explain** Why are graphics an important element of a technical document? How might you use graphics in your own writing to explain a complicated idea?
3. **Apply** Write a brief technical document explaining how to do something or describing how something works. Use headings and picture bullets to organize your information. Then ask a classmate to follow your instructions and review the accuracy of your document.

Vocabulary

Key Terms

caption

cross-reference

Fill Effects

form

form field

index

protect

tab leader

table of authorities

table of figures

theme

watermark

Academic Vocabulary

alter

generate

minimize

Review Vocabulary

Complete the following statements on a separate piece of paper. Choose from the Vocabulary list on the left to complete the statements.

1. A(n) ——————— lists the legal references in a document and the page numbers where they appear. (p. 60)

2. Add a(n) ——————— if you want the word Confidential to appear behind text on every page of your document. (p. 49)

3. ——————— change the shading of the background. (p. 48)

4. You can use marked entries within a document to ——————— an index. (p. 58)

5. A(n) ——————— is a list of topics and page numbers that appears at the end of a document. (p. 61)

Vocabulary Activity

6. Create a word search using seven of the vocabulary words from this lesson.
   A. Decide which seven vocabulary words to use in the word search.
   B. Write the definitions for the vocabulary words. These will be the "clues" for your word search.
   C. Create your word search. Create a block of letters. Your seven words should be hidden in this block.
   D. Exchange your word search with a classmate. Try your classmate's word search. Use the definitions to identify the words you need to find. Then find the words in the block of letters.

Review Key Concepts

Answer the following questions on a separate piece of paper.

7. What do you click to add Building Blocks to a document? (p. 53)
   A. Insert>Text>Quick Parts
   B. Insert>Illustrations> Building Blocks
   C. Page Layout>Theme
   D. Page Layout>Links> Building Blocks

8. Which command do you use to add a watermark? (p. 49)
   A. Insert>Illustrations>Picture
   B. References>Captions>Watermark
   C. Page Layout>Page Background>Watermark
   D. Page Layout>Page Setup>Breaks

9. Which dialog box do you use to insert a table of figures? (p. 59)
   A. Caption
   B. Index and Tables
   C. Table of Figures
   D. Tables

10. Which command lets you insert a blank page into a document? (p. 60)
    A. Insert>Pages>Blank Page
    B. Page Layout>Insert>Blank Page
    C. Insert>Text>Blank Page
    D. Insert>Page Layout>New Page

1. Insert a Table of Contents and an Index

DATA FILE

Follow the steps to complete the activity.

Step-By-Step

1 Open the data file **Handbook.docx**. Save as: Handbook-[your first initial and last name]1.

2 On Page 3, click in the second line below **Table of Contents**. Choose **References>Table of Contents>Table of Contents**. Click **Insert Table of Contents**.

3 In the **Table of Contents** dialog box, under **General**, click the **Formats** drop-down arrow. Click **Formal**. Click **OK**.

4 **CHECK** Your screen should look like Figure 2.47.

5 On Page 16, click two lines below **Index**. Choose **References>Index>Insert Index**.

6 In the **Index** dialog box, click the **Formats** drop-down arrow. Click **Formal**. Set **Columns** to **2**. Click **OK**.

7 **CHECK** Your screen should look like Figure 2.48.

8 Save and close your file.

FIGURE 2.47 Table of contents
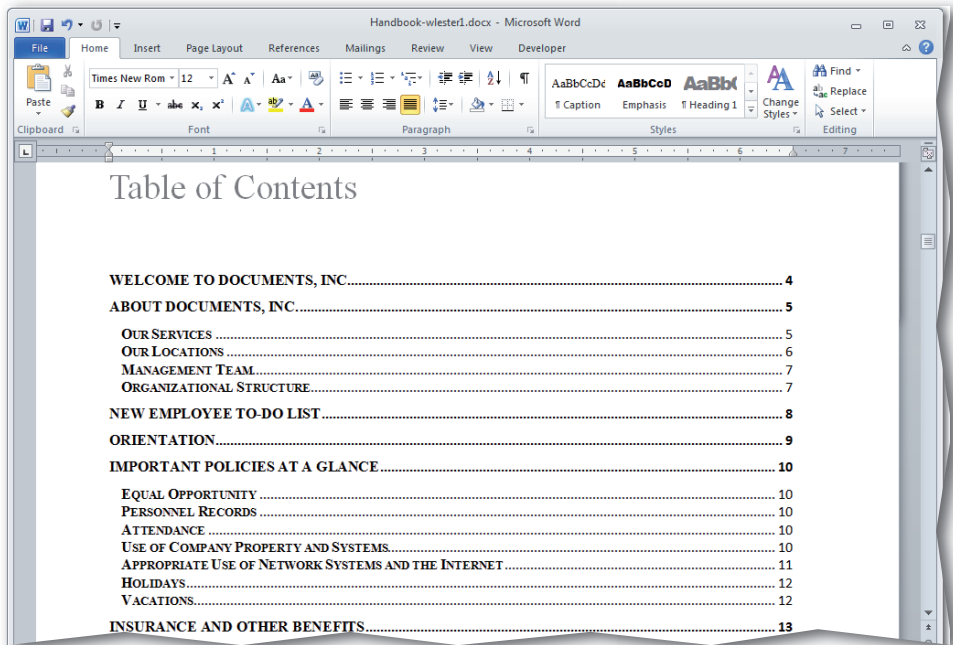
FIGURE 2.48 Index
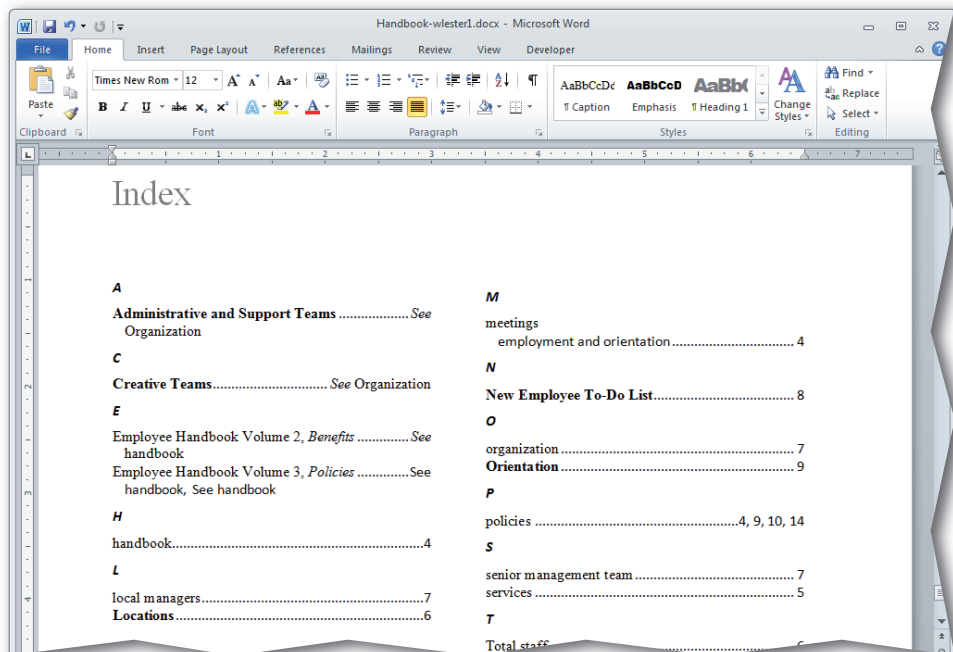
Step-By-Step

1 Open your **Handbook-1** file. Save as: Handbook-[your first initial and last name]2.

2 On Page 4, in line two of paragraph three, select **benefits** (see Figure 2.49).

3 Choose **References> Index>Mark Entry** 📄.

4 In the **Mark Index Entry** dialog box, click **Mark All**. Click **Close**.

5 In the same sentence, repeat Steps 3 and 4 to mark all instances of the words **vacation** and **insurance**.

6 🅸CHECK Your screen should look like Figure 2.49.

7 On Page 16, right-click inside the index. Choose **Update Index** 📄.

8 🅸CHECK Your screen should look like Figure 2.50.

9 Turn off **Show/Hide** ¶. Save and close your file.

2. Add Index Entries and Update an Index

Follow the steps to complete the activity. You must complete Practice It Activity 1 before doing this activity.

FIGURE 2.49 Marked index entries

Select benefits

Select insurance

Select vacation
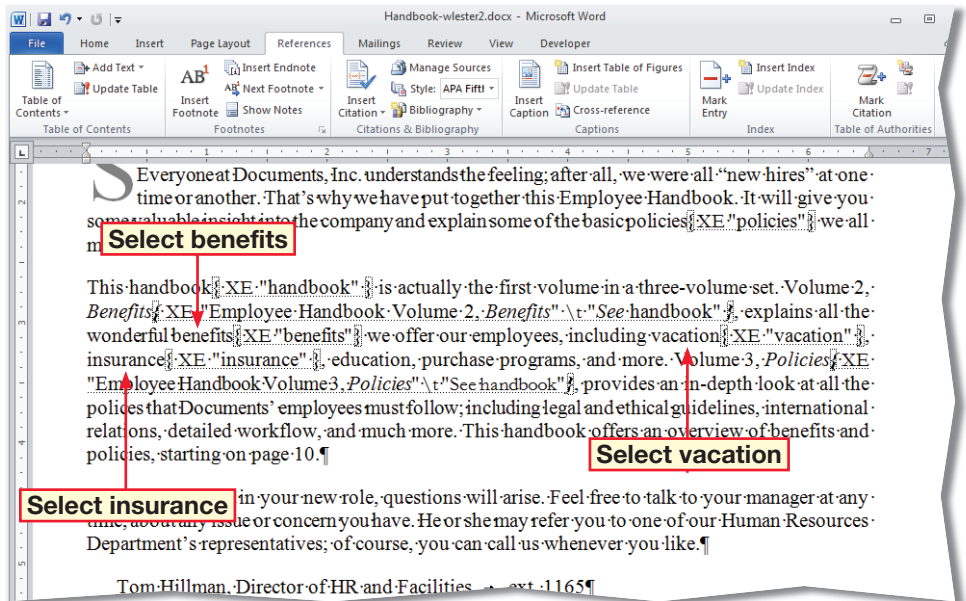
FIGURE 2.50 Updated index

3. Insert a Caption and a Table of Figures

Follow the steps to complete the activity. You must complete Practice It Activity 2 before doing this activity.
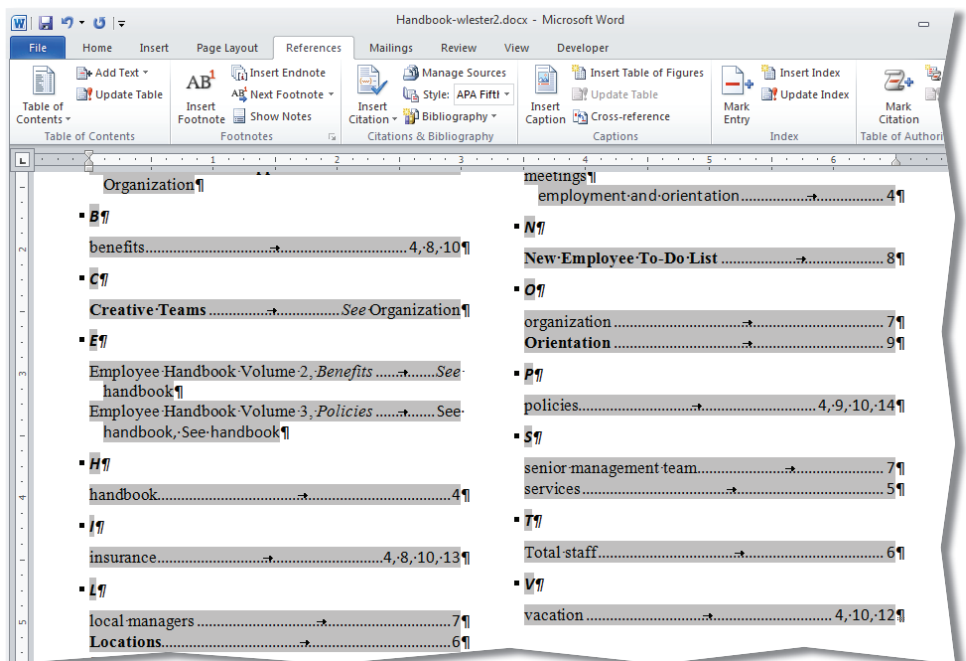
Step-By-Step

1 Open your **Handbook-2** file. Save as: Handbook-[first initial and last name]3.

2 Click below the graphic on Page 6. Choose **References>Captions> Insert Caption**.

3 Click **Numbering**. Click the **Format** drop-down arrow and select **A, B, C, ...**. Click **OK**. Under **Caption**, after **Figure A**, press SPACE. Key: - Our Locations. Click **OK**.

4 *CHECK* Your screen should look like Figure 2.51.

5 On Page 12, click the line under the table. Click **Insert Caption**. Under **Caption**, after **Figure B**, press SPACE. Key: - Holiday Schedule. Click **OK**.

6 On Page 15, click under **Table of Figures**. Click **Insert Table of Figures**.

7 In the dialog box, under **General**, click **Formats**. Click **Formal**. Click **OK**.

8 *CHECK* Your screen should look like Figure 2.52. Save and close your file.

FIGURE 2.51 Caption for Figure A
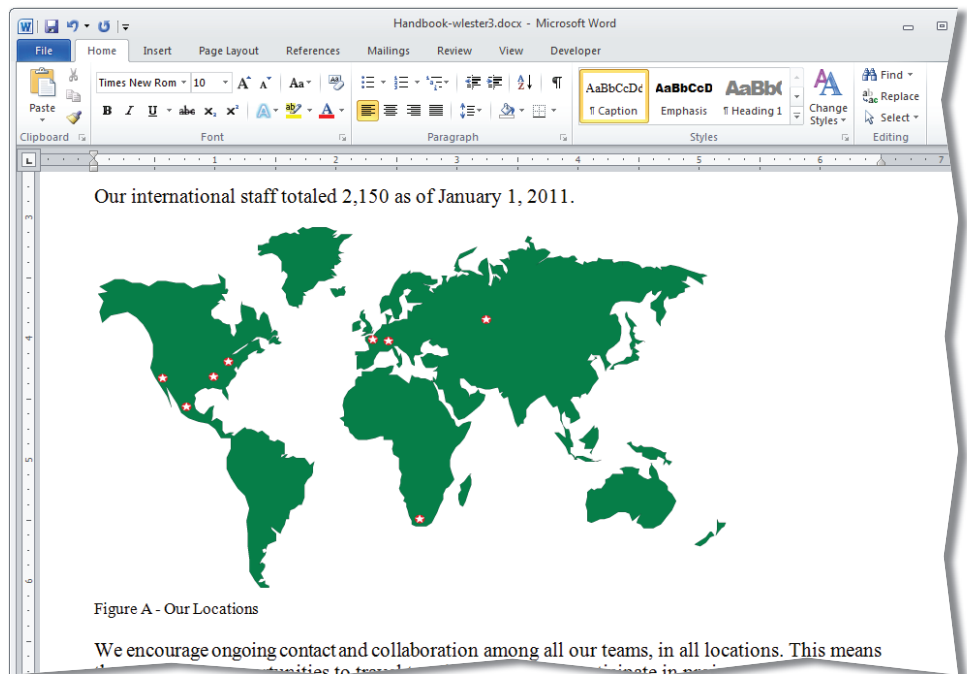
FIGURE 2.52 Table of figures

Nova Development

4. Create a Form to Gather Information

The film club at your school is showing a series of films on Saturdays. You are in charge of creating a form to find out what kind of films students would like to see.

FIGURE 2.53 Form with list of choices
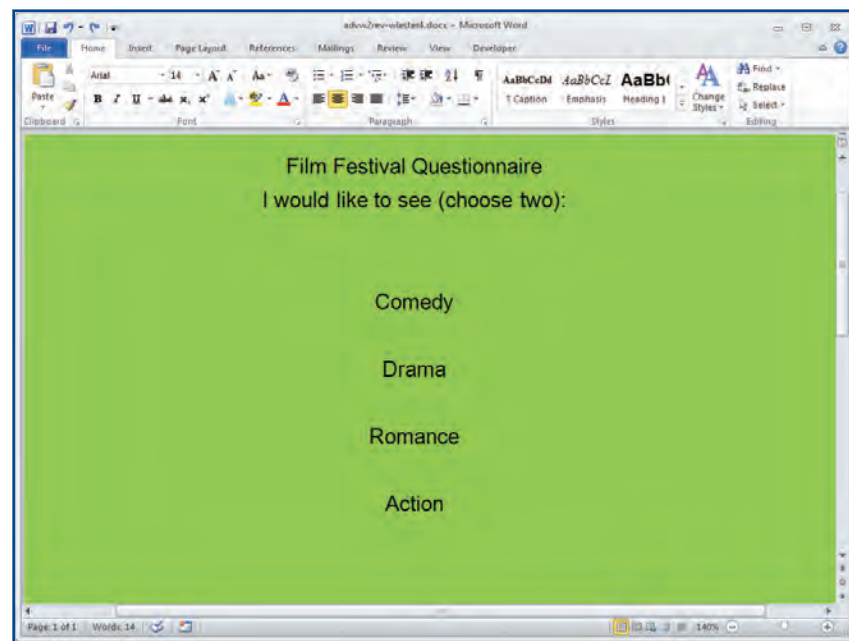
FIGURE 2.54 Protected form with check boxes inserted

Step-By-Step

1. Create a new blank document. Save as: adv-w2rev-[your first initial and last name]4.docx.

2. Key: Film Festival Questionnaire. Press ENTER. Key: I would like to see (choose two):. Press ENTER.

3. On four separate lines, key: Comedy, Drama, Romance, and Action. Add a line space above the first option and add a line space between options.

4. Choose **Select All**. Change the **Font** to **Arial, 14 pt**. Center the text.

5. Change the background to **Light Green**.

6. **CHECK** Your screen should look similar to Figure 2.53.

7. On the **Developer** tab, in the **Controls** group, insert a check box after each option.

8. Protect the form.

9. **CHECK** Your screen should look similar to Figure 2.54. Save and close your file.

5. Create a Film Festival Flyer

The film festival is coming up and you want to promote it. You would like to create a draft version of a flyer that can be e-mailed to students and posted around campus. You must complete You Try It Activity 4 before doing this activity.

FIGURE 2.55 Festival flyer with clip art inserted

FIGURE 2.56 Origin theme, fill effects, and watermark applied to flyer

Step-By-Step

1 Open your **adv-w2rev-4** file. Save as: adv-w2rev-[your first initial and last name]5.

2 Unprotect the document.

3 Delete all the text. Provide details about the film series (see Figure 2.55).

4 Choose **Select All**. Increase the font size to **40 pt**.

5 Click below **School Auditorium**. Insert an appropriate piece of **Clip Art**.

6 **CHECK** Your screen should look like Figure 2.55.

7 Change the theme of the flyer to **Origin**. In the **Fill Effects** dialog box, change the **Gradient** to **Two colors**. Set the **Shading styles** to **Horizontal**. Then, add a **Page Border** and use the **Quick Parts** tool to add a watermark **Building Block**.

8 **CHECK** Your screen should look similar to Figure 2.56. Save and close your file.

6. Beyond the Classroom Activity

Language Arts: Evaluate Word Features   You have an aunt who is writing a book about the history of your town. You are going to help her format the book. Before you start, you need to identify which Microsoft Word features might be useful to her when navigating and working in a lengthy document. Use the Help tool to learn more about these features, including Word's Navigation Pane and using master and subdocuments in Outline View. Then, write a brief technical document explaining how these features work and how they could be useful when working on the book.

Save your document as: adv-w2rev-[your first initial and last name]6.

7. Standards at Work Activity
Microsoft Office Specialist Correlation
Word 6.3   *Create a Table of Contents in a document.*

DATA
FILE

Create and Modify Table of Contents   Your supervisor at Benson and Cassidy Advertising has asked you to add a table of contents to a document for employees. You also need to make a few last corrections to the document in order for it to be ready to be distributed. Open the data file **Benson.docx** and add a table of contents to the document. Use a default format, and set the levels, alignment, and tab leader styles.

- Remove the word **Executive** from the heading on Page 2.
- Remove the word **Questionnaire** from the heading on Page 5.
- Remove the word **Other** from the heading on Page 13.
- Update the table of contents to include the changes.
- Use the Quick Parts tool to create and save your own Building Blocks for a cover page and footer that can be reused for other documents.

Save your file as: Benson-[your first initial and last name]7.

8. 21st Century Skills Activity

Value Diversity at School   In your community, there are people of different ethnic backgrounds, races, and religions. Different people have different views, interests, and abilities.

- Key a short letter to a friend. Tell your friend about someone you met recently. Tell your friend about two things you could learn from this person that you would not learn from anyone else you know.
- Add a page border and apply your favorite theme to the document.

Save your document as: adv-w2rev-[your first initial and last name]8.

Before You Begin

Customize Using the same theme across all documents associated with a single event helps people connect the information presented. In these projects, you will create a custom theme to use on three documents for a music festival.

Reflect After you complete the projects, open a Word document and answer the following questions:

1. How did you decide which colors to use?

2. What changes would you make if the event were a children's festival? A business conference? A pep rally for your school?

9. Organize a Music Festival

Language Arts: Create a Flyer You are helping to organize an outdoor international music festival. Create a flyer to recruit musicians to perform at the event. Create a new theme with a custom color scheme for the flyer. Be sure to include the following information:

- Dates and times of performances.
- Location.
- Types of music needed.
- Name and contact information of organizer.

Include a graphic and border on the flyer.

Save your document as: adv-w2rev-[your first initial and last name]9.

10. Create a Festival Program

Language Arts: Format a Long Document You have been asked to create a program for the outdoor international music festival. The program must include information about the schedule, bands, food booths, and children's activities. Use Word to create a program that includes:

- A cover page (first page) that lists the festival's name and date.
- A table of contents (second page). Set the alignment and modify the style used for the table of contents.
- At least two levels of headings (Heading 1 and Heading 2).
- At least six headings that provide a logical outline for the festival's information.
- Two simple figures with captions.

Save your document as: adv-w2rev-[your first initial and last name]10.

11. Format a Report

Language Arts: Add Report Formatting and Features The mayor has asked you to format a report to help next year's organizers. Open the data file **Festival.docx**. Make the following formatting changes to the report:

- Add a DRAFT watermark.
- Apply a theme.
- Insert a table of contents.
- Add entries to the index for **sponsors**, **food**, **travel**, and **children**.
- Update the index.

Save the report as: Festival-[your first initial and last name]11.

Doug Scott/ Age Fotostock America, Inc.

In school and in business, you will often need to work with others to complete a project. In this lesson you will learn how to use Word features to share documents and collaborate with reviewers to create customized, professional documents. You will also discover how to modify options in Word and use the program's security features to safeguard your work.

Key Concepts

- Customize Word options
- Change reviewer options
- Insert Date and Time stamps
- Set formatting and editing restrictions
- Apply passwords and digital signatures
- Combine versions of a document and Mark as Final
- Save a file as a previous version

Standards

The following standards are covered in this lesson. Refer to pages xxiv and 715 of the Student Edition for a description of the standards listed here.

ISTE Standards Correlation

NETS•S

1a, 1b, 2a, 2b, 2c, 2d, 3b, 3c, 4b, 4c, 4d, 5b, 6a, 6d

Microsoft Office Specialist

Word

1.1, 1.2, 1.3, 1.4, 1.5, 2.2, 3.5, 5.3

21st CENTURY SKILLS

Find the Right Resources You learn a lot in school, but you can learn even more using the resources in your community. Within your local community, you can discover many resources to help you find information and learn new things. For example, your local public library has books, magazines, and newspapers, as well as librarians who can help you get the most out of the library. Your library may also have computers that connect to the Internet, where you can explore any topic. *How often do you go to your local public library? What kinds of programs and resources does your library offer for teenagers?*

Jose Luis Pelaez, Inc./CORBIS
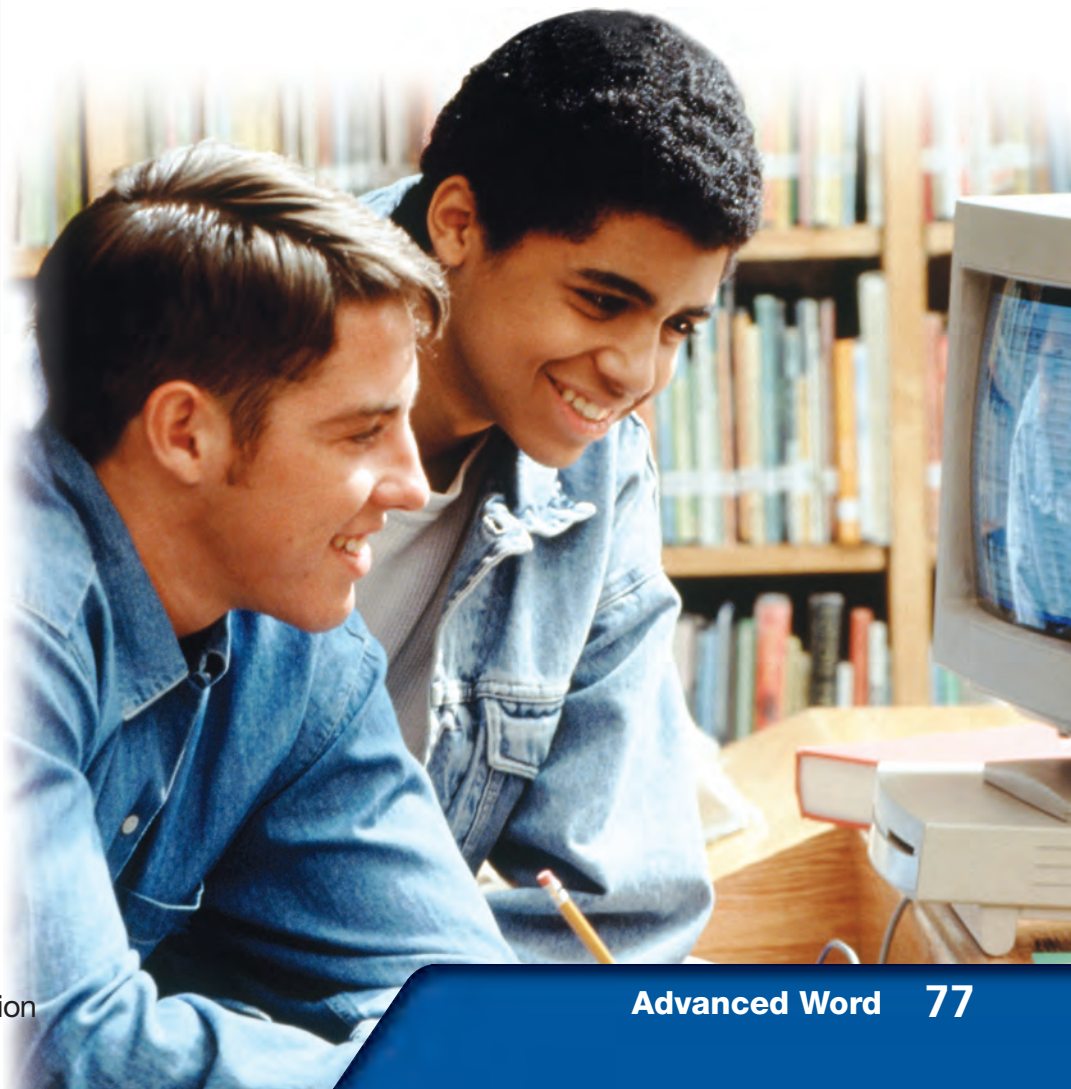
Before You Read

Create an Outline Use the exercise titles in this lesson to create an outline. Make the exercise titles into Level 1 main ideas. Use the lesson's Key Concepts and Vocabulary to fill in Level 2 and Level 3 details.

Read To Learn

- Learn how to customize Track Changes to get the most out of your collaborations.
- Understand the value of protecting documents.
- Reflect upon ways to use multiple document versions in school and at work.
- Consider why saving a file in an earlier Office format can improve accessibility to content.

Main Idea

Word offers many tools that will allow you to collaborate with others to customize settings and create and share professional documents.

Vocabulary

Key Terms

balloon	Mark as Final
combined document	password
Compatibility Checker	Reviewing Pane
digital certificate	signature line
digital signature	Track Changes
editing restrictions	Track Changes Options
formatting restrictions	Track Formatting
ink color	Track Moves
markup	version

Academic Vocabulary

You will find these words in your reading and on your tests. Make sure you know their meanings.

exempt
revert

Quick Write Activity

Describe On a separate sheet of paper, describe a project that you have worked on as part of a group. How did you share information with members of your team? How did you divide tasks between group members? What methods did you use to handle the written components of the project?

Study Skills

Ask for Help If you do not understand something, ask for help immediately. Do not wait a day—or even a few hours. Ask early so that you can make sure that the work you do is correct and meets expectations.

Academic Standards

English Language Arts

NCTE 4 Adjust use of language to communicate effectively with a variety of audiences.

NCTE 7 Conduct research and gather, evaluate, and synthesize data to communicate findings.

NCTE 12 Use language to accomplish individual purposes.

1 Start **Word**. Choose **File> Options**. Click **General**.

2 Under **Start up options**, uncheck the **Open e-mail attachments in Full Screen Reading view** check box.

3 Under **Personalize your copy of Microsoft Office**, in the **User name** box, key: [your first name_ and last name]. (For example, *Willem_Lester*.)

4 In the **Initials** box, key your first and last initials. (For example, *WL*.)

5 **CHECK** Your dialog box should look similar to Figure 3.1. Click **Save**.

6 Note the options for changing how documents are saved. Under **Save documents**, locate the **Default file location** box. Click **Browse**.

7 In the **Modify Location** dialog box, click **New folder**. Key the folder name: Employee Resources. Press ENTER. Double-click the new folder to open it.

8 **CHECK** Your screen should look like Figure 3.2. Click **OK**. Click **OK** in the **Word Options** dialog box.

➡ *Continue to the next exercise.*

EXERCISE 3-1
Customize Word Options

Customizing Microsoft Word can help you work more efficiently. For example, you can set a default location to use when saving files. You can disable the feature that opens e-mail attachments in Full Screen Reading view. When you review documents using the Track Changes feature, you can also personalize the user name and initials associated with the revisions you make, or even change how Word corrects and formats your documents. Be sure to check with your teacher before changing any default settings. Once settings are changed, it might be difficult to revert, or return to, the original settings.

FIGURE 3.1 Word Options dialog box
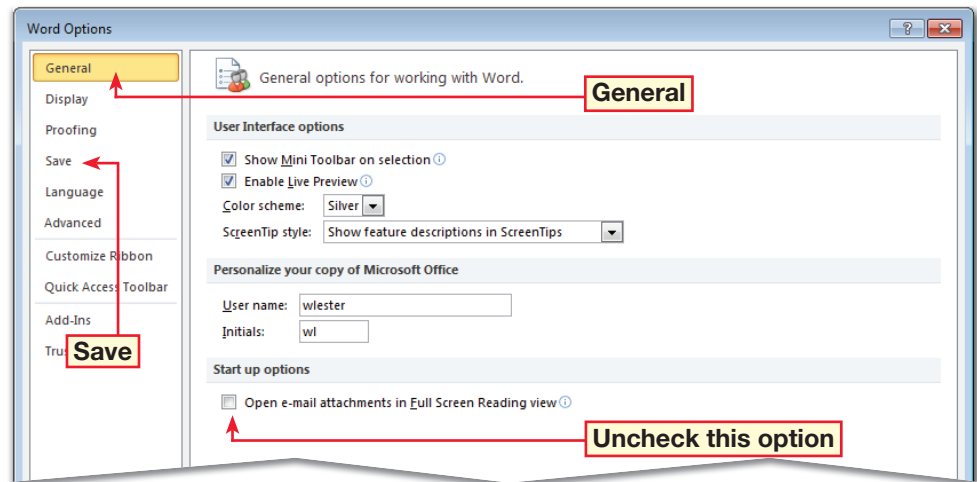
FIGURE 3.2 Modify Location dialog box
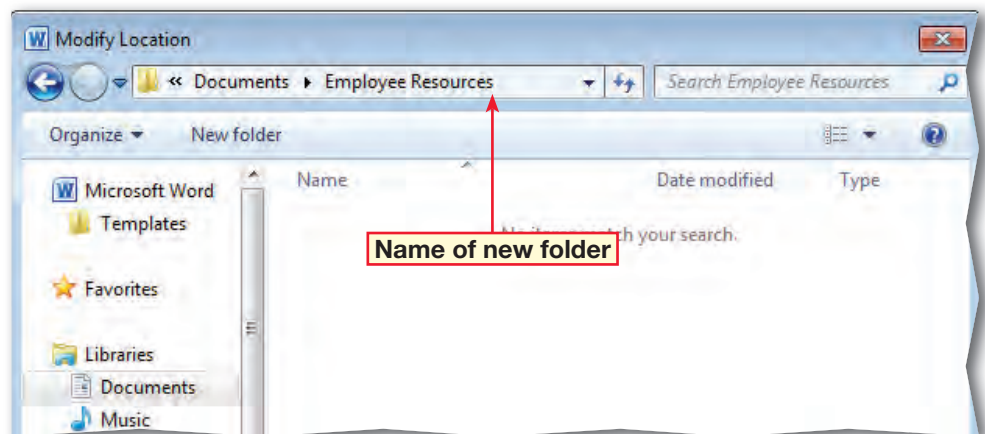
You Should Know

To disable the **AutoCorrect** options, choose **File>Options>Proofing**. Click the **AutoCorrect Options** button and remove all the checks from the boxes. Click **OK**.

1. Start **Word**. Locate and open the data file **Resources.docx**. Save as: Resources-[your first initial and last name]. (For example, *Resources-wlester*.)

2. Choose **Review>Tracking** and click the **Track Changes** drop-down arrow. Select **Change Tracking Options**.

3. In the **Track Changes Options** dialog box, click the **Color** drop-down arrow to the right of **Insertions** (see Figure 3.3).

4. Click **Bright Green**. Click **OK**.

5. **iCHECK** Your screen should look like Figure 3.4.

6. Position the insertion point on one of the green insertions. A note appears with the reviewer name, date, and time of the edit.

Academic Skills

Track Changes is a great tool for checking your progress as a writer. Ask a teacher or a friend to edit your work with **Track Changes** on. Your editor can add advice and input in the form of comments.

EXERCISE 3-2
Customize Track Changes

When the Track Changes feature is turned on, each person working with a document can make revisions in a different color. You can set reviewer options to specify the appearance of insertions, deletions, and comments. For example, insertions, or added text, might be underlined in red ink color, while deletions, or text that has been removed from the document, are marked up with strikethrough text or a double underline. You can also specify whether deletions and comments, or questions about the text, appear directly within a document or in a balloon in the margin.

FIGURE 3.3 Track Changes Options dialog box
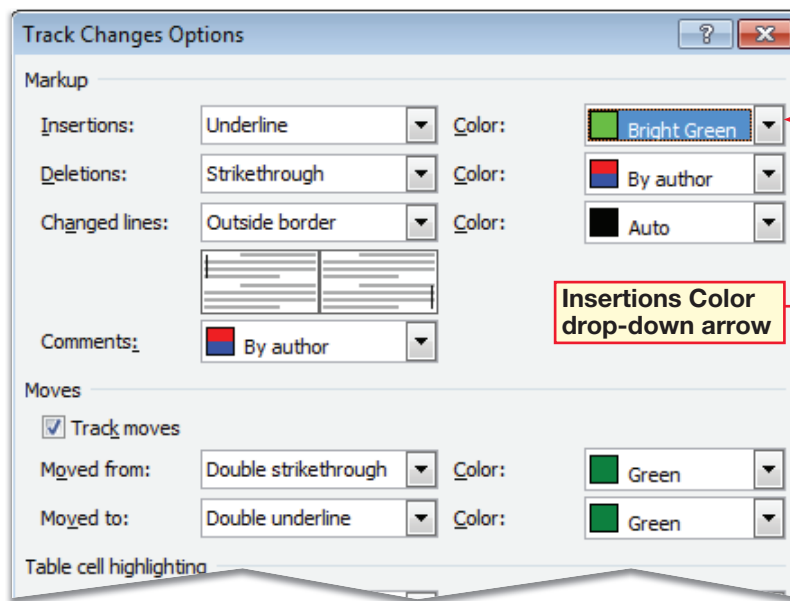
FIGURE 3.4 Insertions changed to bright green

Customize Track Changes
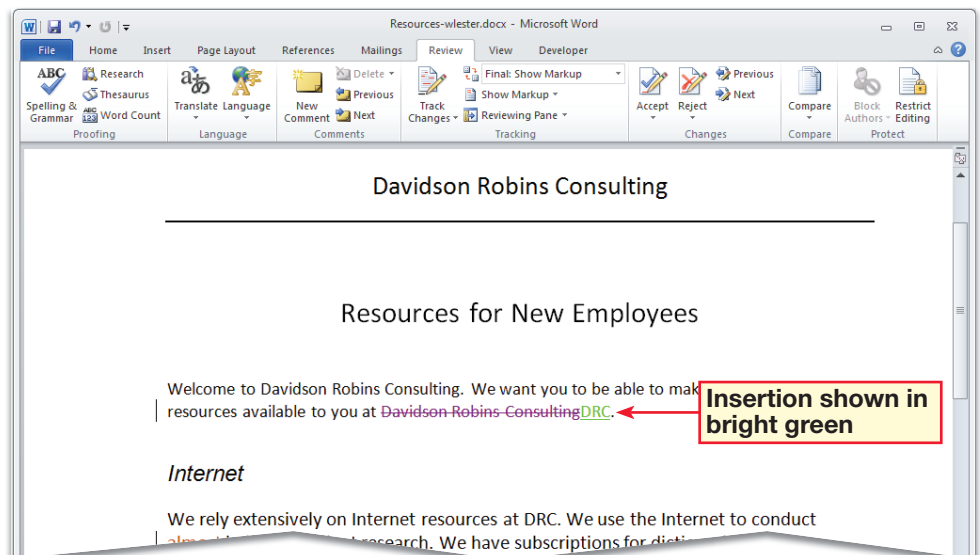
7 In your **Resources** file, choose **Review>Tracking** and click the **Track Changes** drop-down arrow. Select **Change Tracking Options**.

8 In the **Track Changes Options** dialog box, under **Balloons**, click the **Use Balloons** drop-down arrow.

9 Click **Only for comments/formatting**.

10 Click the **Margin** drop-down arrow.

11 Click **Left** (see Figure 3.5). Click **OK**.

12 Scroll down and to the left, if necessary, to see a balloon.

13 **CHECK** Your screen should look like Figure 3.6.

14 Save your file.

➡ *Continue to the next exercise.*

Tech Tip

Specify whether revisions are shown in balloons or inline (directly within the document) by choosing **Review>Tracking>Show Markup>Balloons**.

FIGURE 3.5 Track Changes Options dialog box

Use Balloons drop-down arrow

Margin drop-down arrow
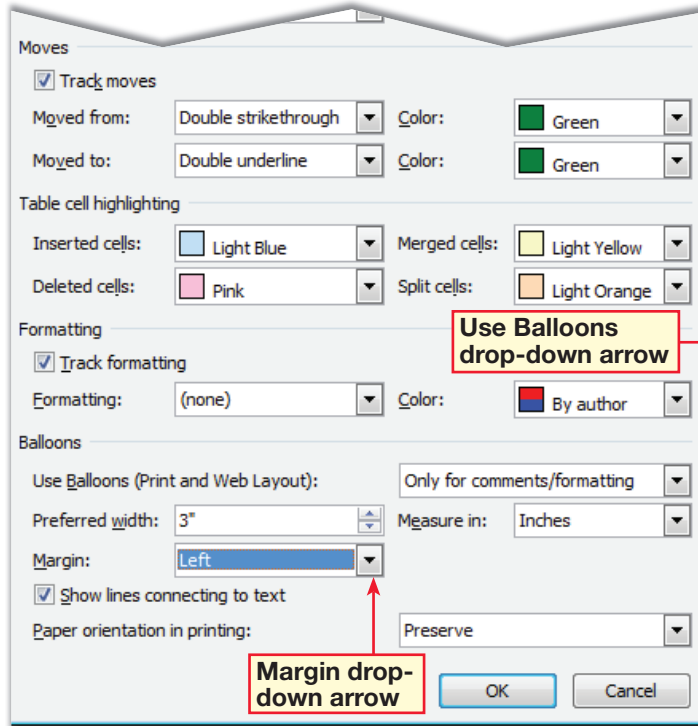
FIGURE 3.6 Balloon in left margin

Deletion does not appear in balloon

Comment appears in left margin

EXERCISE 3-3
Show and Hide Reviewers

If more than one person has made changes to a document, you can show or hide each reviewer's changes before sharing the document. You may want to do this if you do not want reviewers to see each other's changes or comments. If reviewers' changes conflict with each other, you can use this feature to compare each person's changes independently before you decide which changes to accept and which to reject.

1 In your **Resources** file, choose **Review> Tracking>Show Markup** 📄.

2 Select **Reviewers**. Click **Ruth Stein** (see Figure 3.7). Scroll through the document. Ruth Stein's changes are now hidden.

3 In your **Resources** file, choose **Review> Tracking>Show Markup** 📄.

4 Select **Reviewers**. Click **Willem Lester**. Willem Lester's changes are now hidden.

5 **ℹCHECK** Your screen should look like Figure 3.8. Notice that only Giselle Sanchez's changes are shown. Save your file.

6 With your teacher's permission, use e-mail to exchange PDF and XPS versions of the file with a classmate.

➡ *Continue to the next exercise.*

You Should Know

Hiding changes does not remove changes. To remove changes from a document, you must use the **Accept** and **Reject** commands. To do this, choose **Review> Changes** and click **Accept** or **Reject**.

FIGURE 3.7 Selecting which reviewers' comments to show
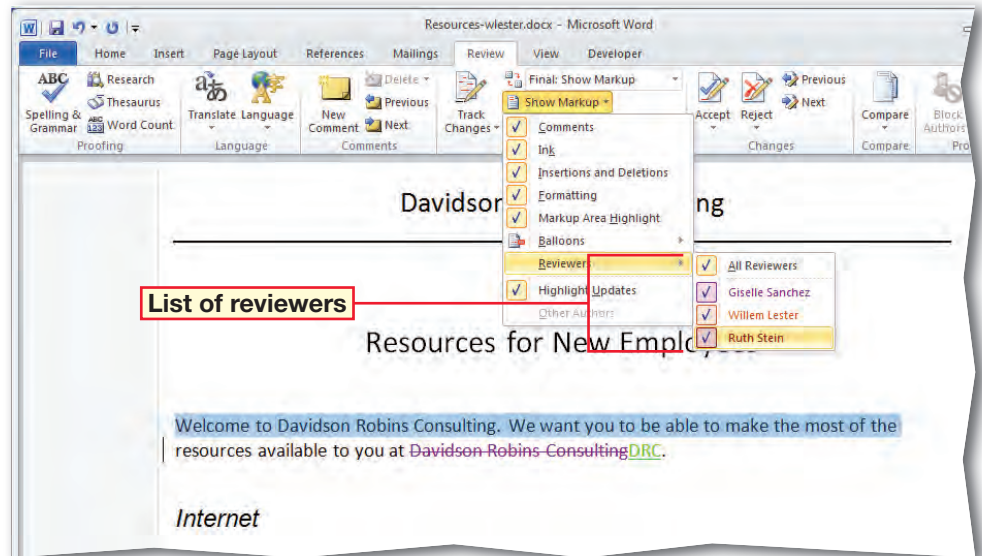
FIGURE 3.8 Document with only Giselle Sanchez's changes shown
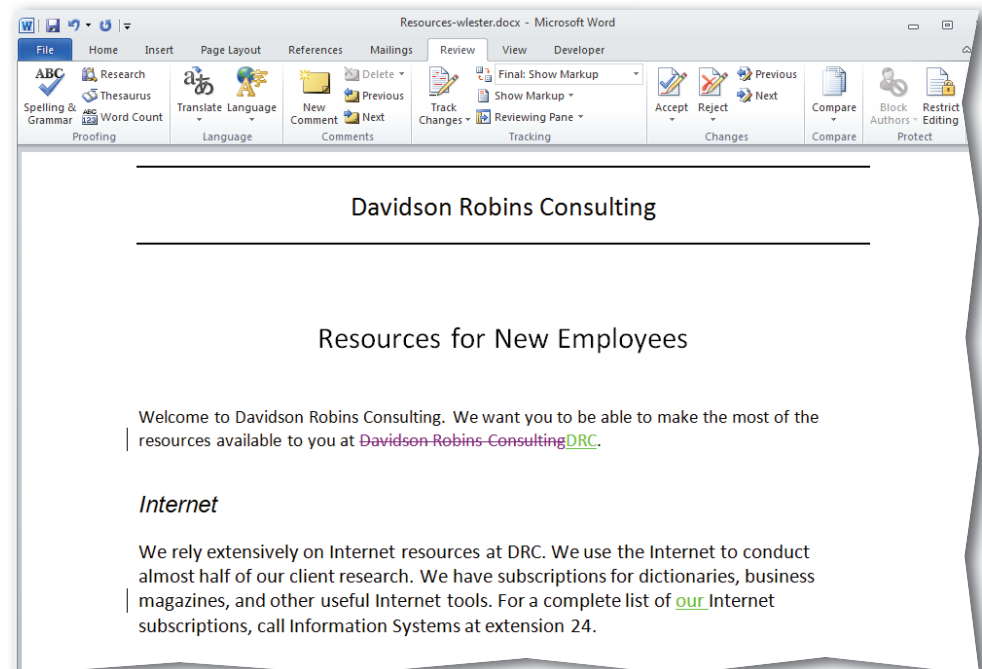
1. In your **Resources** file, click **Show Markup**. Click **Comments** to turn it off. Click **Show Markup** again. Choose **Reviewers>All Reviewers** if not already checked.

2. Click **Review>Tracking>Reviewing Pane**.

3. **CHECK** Your screen should look like Figure 3.9.

4. In the **Changes** group, click **Next Change**. The first tracked change is selected. In the **Reviewing Pane**, in Willem Lester's insertion, select **DRC**.

5. Choose **Home>Editing>Find**. Click the **Find Options** drop-down arrow. Click **Advanced Find**. Click **Reading Highlight**. Select **Highlight All**. Close the dialog box and **Navigation Pane**.

6. Delete **DRC** from Willem Lester's insertion in the task pane. Close the pane. On the **Review** tab, click **Track Changes** to turn it on. Turn **Comments** off. In the second sentence in the paragraph under **Internet**, click after **conduct**. Key: more than. Save your file.

7. **CHECK** Your screen should look like Figure 3.10.

➡ *Continue to the next exercise.*

EXERCISE 3-4
Modify Insertions and Deletions

If tracked changes, or ==markup==, have been added to a document, you can preview the final document to see what it would look like if you accepted all the changes. You can choose to accept or reject each revision, or you can modify the changes before accepting them. Accepted changes appear in black ink. Rejected changes are deleted. Use the ==Reviewing Pane== to ensure that all tracked deletions, insertions, comments, and formatting changes have been removed from a document before you share it with others. A summary section at the top of the Reviewing Pane displays a count of the markup and comments that remain in the document.

FIGURE 3.9 Reviewing Pane
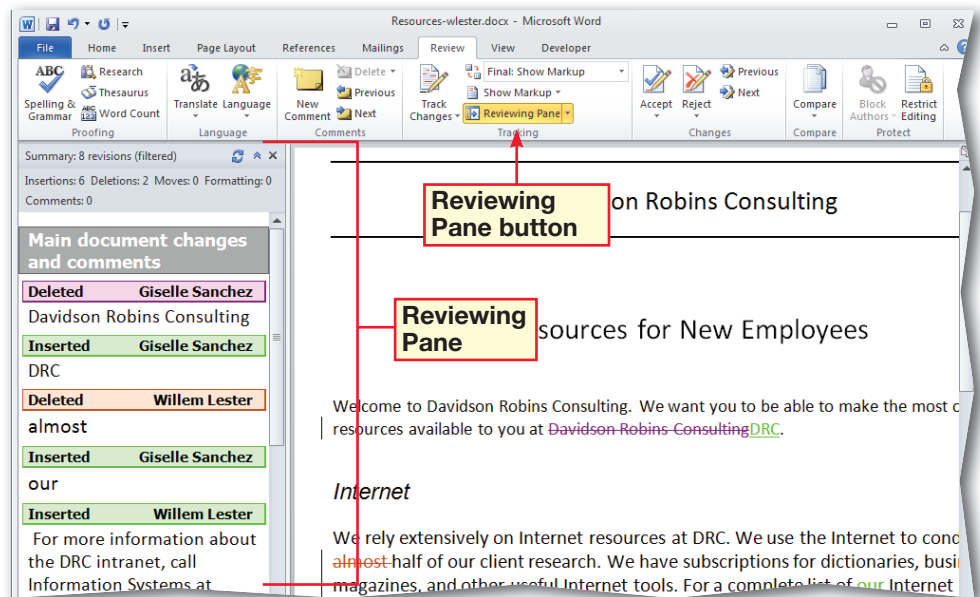
FIGURE 3.10 Document with new insertions and deletions

Track Formatting and Content Changes

Word allows you to track changes made to the formatting of text and graphics. You can also track whether text has been moved to or from another section of the document. To specify that you want to Track Moves and Track Formatting use the Track Changes Options. You can also personalize the user name and initials associated with the comments and revisions you make by choosing Review>Track Changes>Change User Name.

FIGURE 3.11 Font formatting tracked

FIGURE 3.12 Moved text

1 In your **Resources** file, choose **Review>Tracking** and click the **Track Changes** drop-down arrow. Select **Change Tracking Options**.

2 Click the **Formatting** drop-down arrow and select **Bold**. Select **By author** in the **Formatting Color** box. Click **OK**.

3 Select the paragraph under **Internet**. Change the font size to **11 pt**.

4 **CHECK** Your screen should look like Figure 3.11.

5 Click the **Track Changes** drop-down arrow. Select **Change Tracking Options**. Under **Moves**, note how text that is **Moved to** and **Moved from** a section of the document will be tracked. Click **Cancel**.

6 Scroll down and click after **Market Research ext. 23**. Press ENTER. Select the sentence under **DRC Departments**. Click and drag it under **Market Research ext. 23**.

7 **CHECK** Your screen should look like Figure 3.12. Save your file.

➥ *Continue to the next exercise.*

1 In your **Resources** file, choose **Insert>Header & Footer>Header** 📄.

2 Select **Edit Header**. The **Header & Footer Tools** tab opens. Key your first initial and last name. Press the **spacebar**.

3 Choose **Design>Insert> Date & Time** 📅.

4 In the **Date and Time** dialog box, select the first date in the list (see Figure 3.13). Click **OK**.

5 ⓘ**CHECK** Your screen should look like Figure 3.14. Your document's header is date stamped.

6 In the header, delete the date stamp. Click **Date & Time** 📅. Select the first entry under **Available Formats** that lists the date and time. Click **OK**.

7 Click **Close Header and Footer** ✕.

8 Choose **File>Info.** Click the **Properties** drop-down arrow. Click **Show Document Panel**.

9 In the **Document Information Panel**, in the **Keywords** box, key: Employee Resources. Close the properties and save your file.

➥ *Continue to the next exercise.*

EXERCISE 3-6
Insert Date and Time Stamps in the Header or Footer

You can use headers and footers to show the current date and time, the name of the last person to access or edit the file, or elements such as page numbers and the file name or path. You can also use the Document Information Panel to save the name of the author, or source. Use this panel to add comments about the document and keywords that help identify the file. To insert and format page numbers, choose Insert>Header & Footer>Page Number.

FIGURE 3.13 Date and Time dialog box
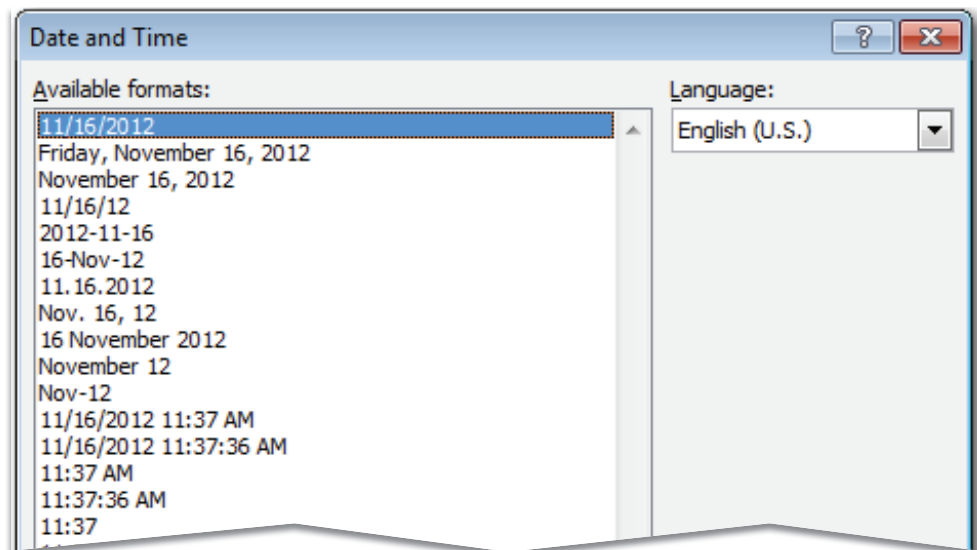
FIGURE 3.14 Date stamp in the header
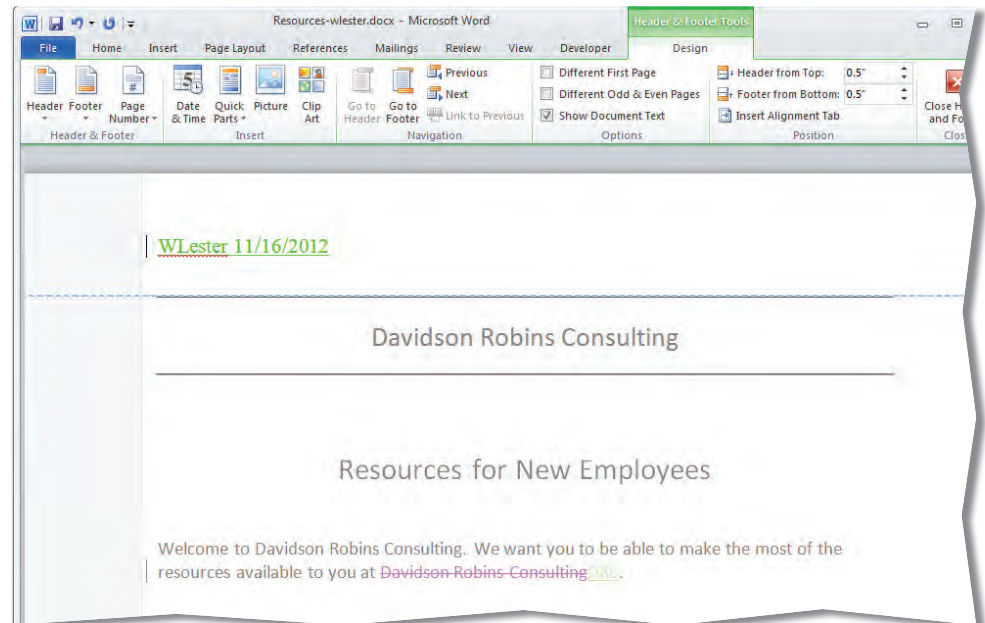
1 In your **Resources** file, choose **Review>Protect> Restrict Editing** 📄.

2 In the **Restrict Formatting and Editing** task pane, under **Formatting restrictions**, click the **Limit formatting to a selection of styles** check box.

3 Click the **Settings** hyperlink. In the **Formatting Restrictions** dialog box, click **OK**.

4 A message appears asking if you want to remove any formatting or styles. Click **No**.

5 Under **Editing restrictions**, click the **Allow only this type of editing in the document** check box.

6 Click the **Editing restrictions** drop-down arrow. Select **Tracked changes** (see Figure 3.15).

7 Under **Start enforcement**, click **Yes, Start Enforcing Protection**. Click **OK**.

8 ⓘ**CHECK** Your screen should look like Figure 3.16. Your document is now protected.

9 Save your file.

➡ *Continue to the next exercise.*

EXERCISE 3-7
Set Formatting and Editing Restrictions

If you want to prevent people from making certain changes to a document, you can set restrictions. **Formatting restrictions** prevent people from changing the formatting of the document. **Editing restrictions** specify the types of content changes that can be made to the document. In order to enforce formatting or editing restrictions, you must use the Protect Document feature in Backstage view or the Restrict Editing feature on the Review tab.

FIGURE 3.15 Restrict Formatting and Editing task pane
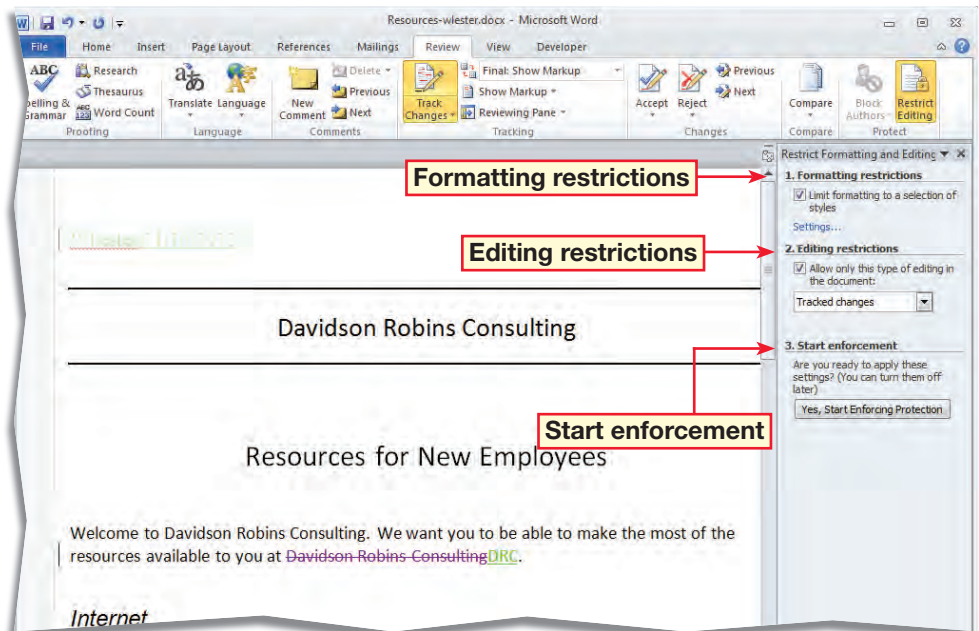
FIGURE 3.16 Protected document with formatting and editing restrictions set
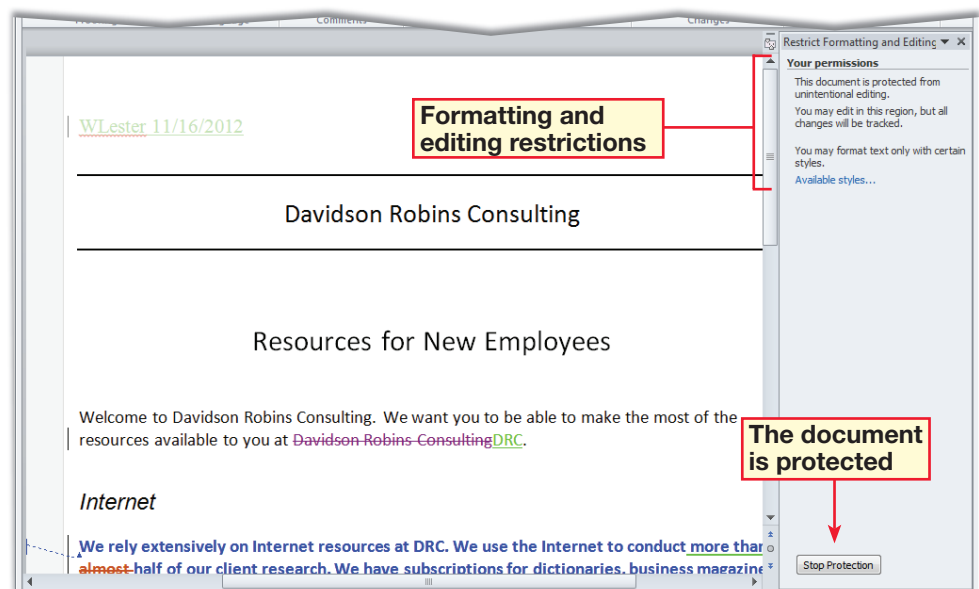
1. In your **Resources** file, click the **Stop Protection** button at the bottom of the **Restrict Formatting and Editing** task pane.

2. Click the **Editing restrictions** drop-down arrow. Click **No changes (Read only)**.

3. In the document, select the first paragraph.

4. In the task pane, under **Exceptions (optional)**, click the **Everyone** check box (see Figure 3.17). Everyone is now able to make changes to the first paragraph only.

5. Click **Yes, Start Enforcing Protection**. In the **Start Enforcing Protection** dialog box, click **OK**.

6. **CHECK** Your screen should look like Figure 3.18. Save your file.

→ *Continue to the next exercise.*

Troubleshooter

If you choose not to assign a password to a document, anyone who accesses the file can change the editing restrictions.

EXERCISE 3-8
Add Users Excepted from Restrictions

You may set the editing restrictions of a document to allow no changes or to allow users to add only comments. However, you can revise these restrictions by changing select parts of the document to allow edits. You can also *exempt*, or excuse, specific users from the restrictions so that they can edit those sections while others cannot. If the document is protected, you must unprotect it before changing its editing restrictions.

FIGURE 3.17 Setting exceptions to editing restrictions
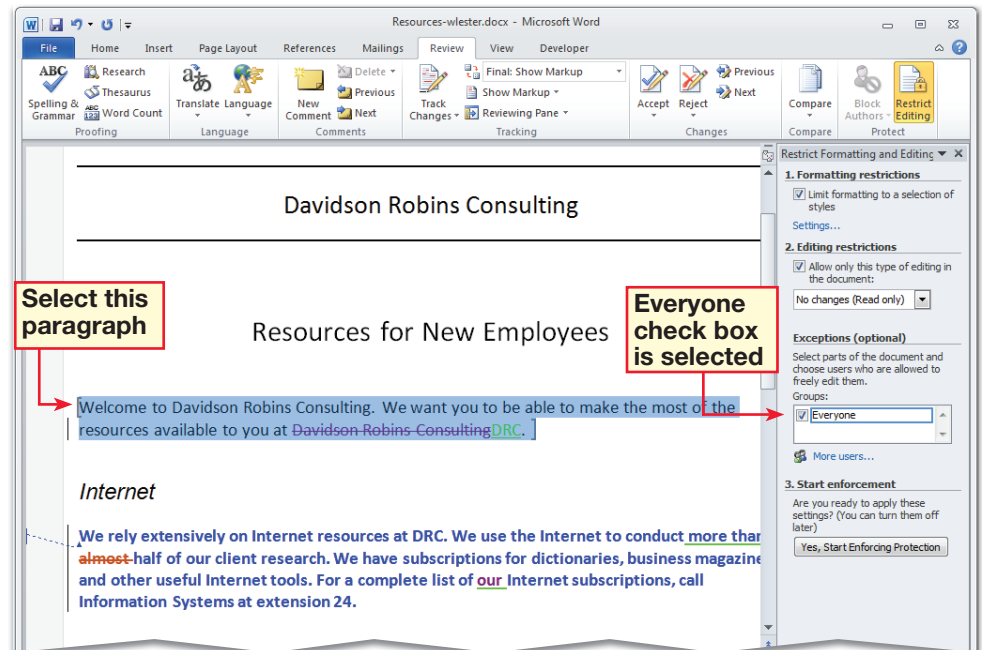
FIGURE 3.18 Document with exceptions to editing restrictions set

EXERCISE 3-9
Apply a Password to a Document

You can apply a **password**, or a string of characters used to protect a document. The password prevents people from changing formatting and editing restrictions. If your document is protected, you must unprotect the document before you can create a password.

FIGURE 3.19 Start Enforcing Protection dialog box
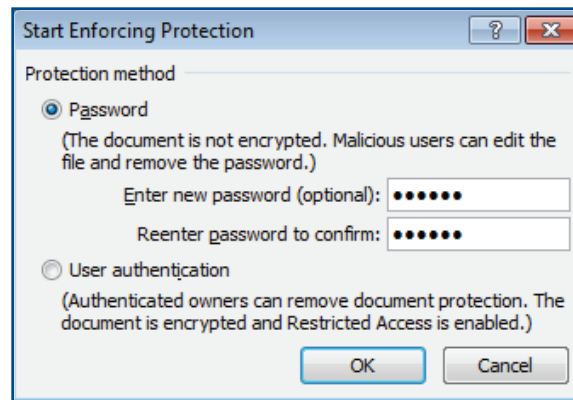
FIGURE 3.20 Password-protected document

You Should Know

When you select passwords for documents or even for secure Web sites, be sure to choose a combination of letters and numbers that will be easy for you to remember, but difficult for anyone else to guess.
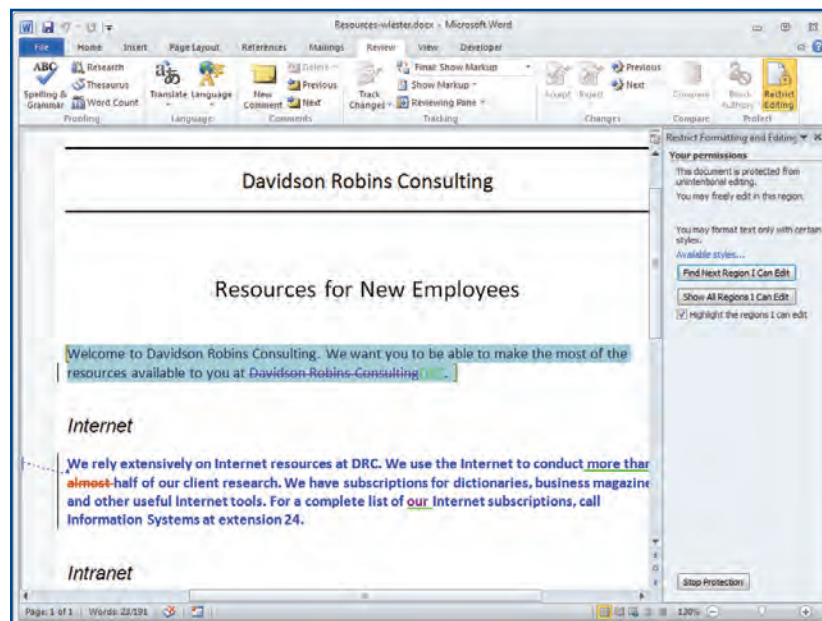
Tech Tip

In Microsoft Office 2010, you can apply protection by using ribbon commands or by using Microsoft Office **Backstage** view. To apply protection using the **Backstage**, choose **File>Info>Protect Document**.

EXERCISE 3-10
Manage Versions of a Document

If you want to merge revisions from multiple authors, you can compare and combine multiple **versions**, or variants, of a document into one **combined document**. Once you have combined the documents into one, use the Show Source Documents command to choose which source documents to display. You can show the original document, the revised document, or both. The Manage Versions command, new in Office 2010, lets you browse and recover recent drafts, or copies, of unsaved documents, and also allows you to return to an earlier version of the file you are working in or to recover a file that you have closed without saving.

FIGURE 3.21 Combine Documents dialog box
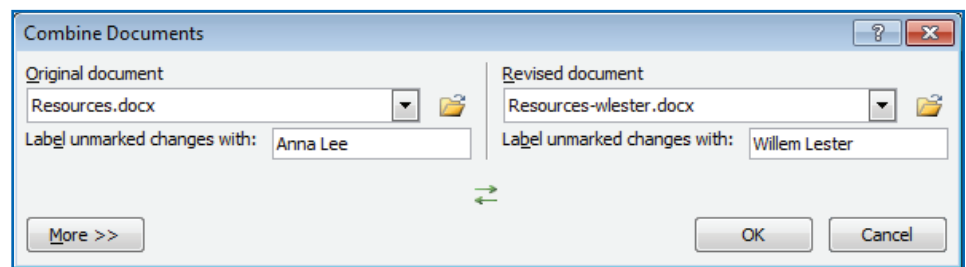
FIGURE 3.22 Combined document with all changes

1 In your **Resources** file, click **Stop Protection**. Key: pass22. Click **OK**.

2 Click **Review>Compare>Compare>Combine**.

3 In the **Combine Documents** dialog box, click the drop-down arrow for the **Original document** box and select the original **Resources** data file that you opened at the beginning of the lesson.

4 Click the **Revised document** drop-down arrow and select your **Resources** file (see Figure 3.21). Click **OK**.

5 In the new document, choose **Review>Compare>Compare>Show Source Documents**. Select **Show Both**.

6 **CHECK** Your screen should look like Figure 3.22.

7 Save the combined document as: Resources-Combined-[your first initial and last name].

8 Click **Show Source Documents**. Select **Hide Source Documents**.

9 Close the **Reviewing Pane**. Close your **Resources** file. Save changes.

➡ *Continue to the next exercise.*

1 In your new **Resources-Combined** file, specify for revisions to appear online. Choose **File>Info>Protect Document**.

2 Select **Mark as Final**. Click **OK**.

3 **CHECK** Your dialog box should look like Figure 3.23. Read the dialog box and click **OK** again.

4 Click the **Home** tab.

5 **CHECK** Your screen should look like Figure 3.24. Note the file is in **Protected View** and the **Marked as Final** icon appears in the status bar at the bottom of the screen.

6 Select the heading **Internet**. Press DELETE. You are unable to delete the heading.

7 Click after the heading **Internet**. Key text after the heading. You are unable to key text into the document.

8 Close your file.

➡ *Continue to the next exercise.*

You Should Know

Documents in the **.docx** format that are marked as final will not be read-only if they are opened in an earlier version of Office.

EXERCISE 3-11
Mark a Document As Final

Before you share a copy of a document with others, use the Mark as Final command to make the document read-only and prevent any further changes to it. When the document is marked as final, keying, editing commands, and proofing marks are disabled. This signals that you are sharing a completed version of a document and prevents others from making changes to it.

FIGURE 3.23 Microsoft Word dialog box
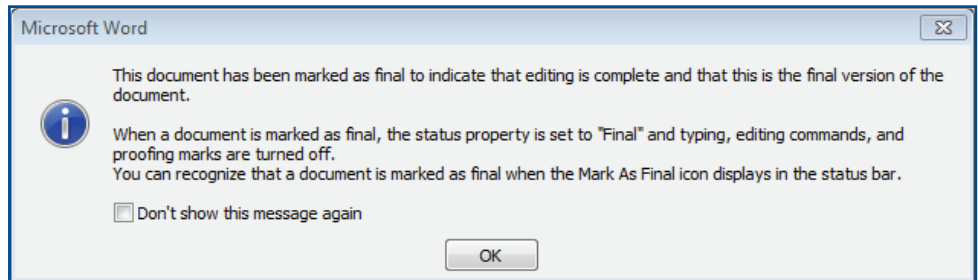
FIGURE 3.24 Document marked as final
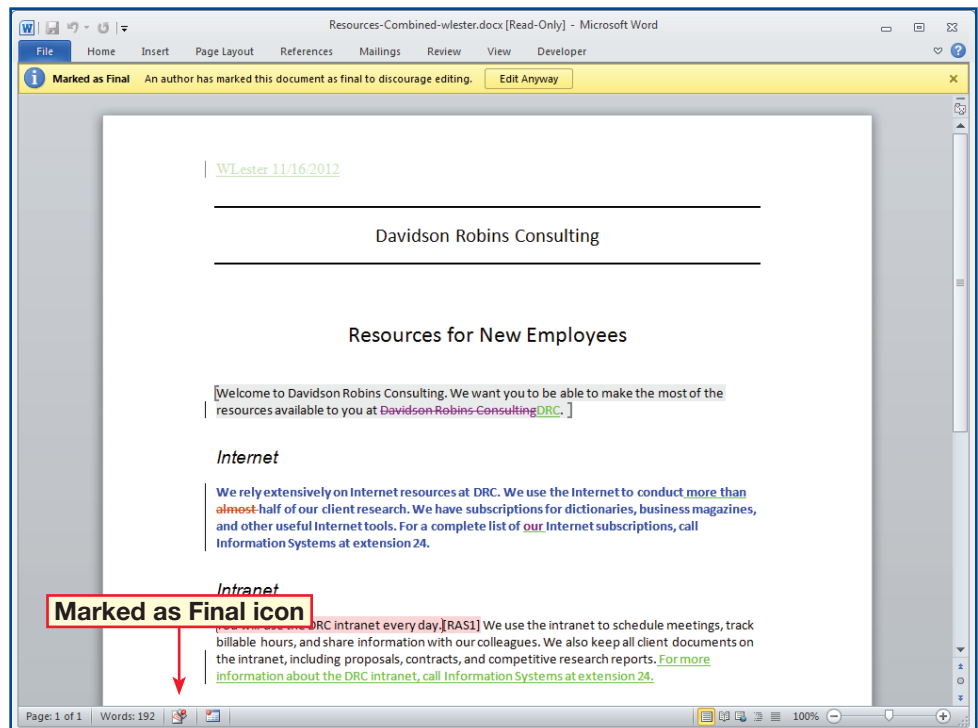
Microsoft Office 2010

To browse and recover or delete recent copies of unsaved documents, choose **File>Info>Manage Versions**.

1 In your **Resources** file, choose **File>Info>Check for Issues>Check Compatibility**.

2 **CHECK** Your dialog box should look like Figure 3.25. The tracked changes in the current version will be converted to insertions and deletions when saving in an earlier format. Click **OK**.

3 Choose **File>Save & Send>Change File Type>Word 97-2003 Document (*.doc)**. Click **Save As**. Click **Save**.

4 Click **Continue**. Reopen your **Resources.docx** file. Choose **View>Window> Arrange All**.

5 **CHECK** Your screen should look like Figure 3.26. Click **View Side-By-Side**. **Synchronous Scrolling** is automatically selected. Set the other window view to **Synchronous Scrolling**, if necessary. The windows now scroll together.

6 Click **Switch Windows** in the **Resources.docx** file. Select the **Resources.doc** file. The **Resources.doc** file is now active. Save and close the file.

➡ *Continue to the next exercise.*

EXERCISE 3-12
Save Documents As Previous Versions

Word 2010 works with previous versions of Word. To use all of the new features and functionality with an older document, you must convert the document to the .docx format. You can also create a document and convert it to an older version of Word (.doc). If so, you can use the ==Compatibility Checker== to ensure that the document will still be compatible with earlier versions of Word without losing any data. You can also check compatibility when you convert an older document to Word 2010.

FIGURE 3.25 Microsoft Word Compatibility Checker
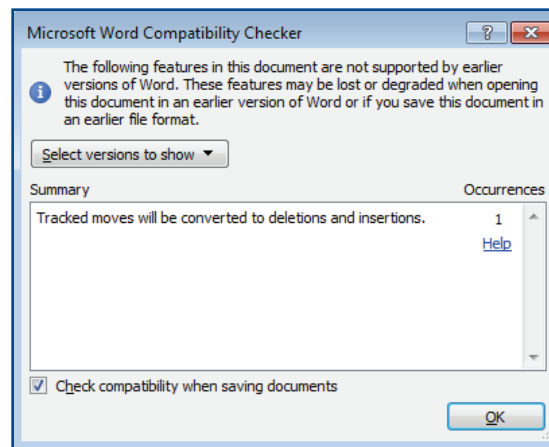
FIGURE 3.26 Documents viewed together
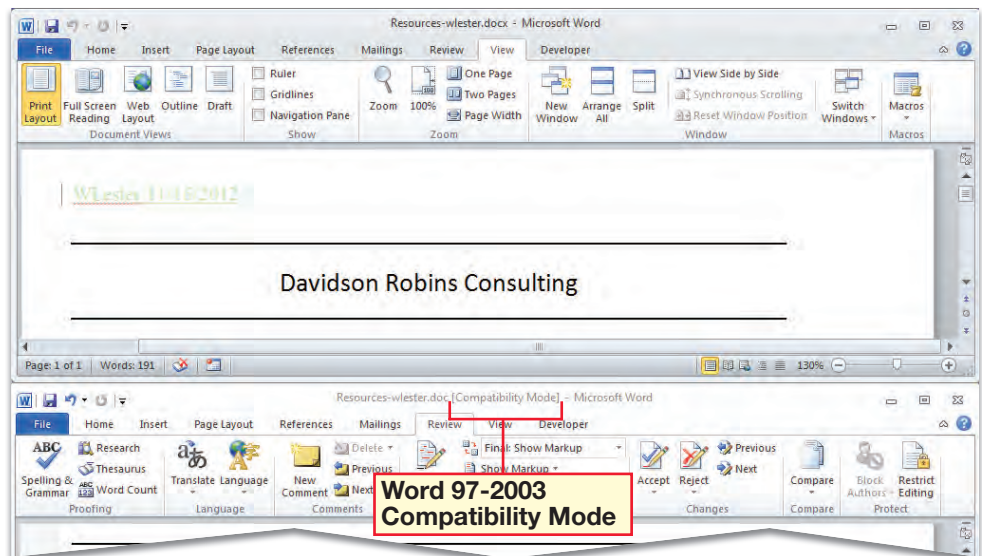
Shortcuts

To reset the window position of files being compared side by side, choose **View>Window>Reset Window Position**.

1 Open your **Resources** file. Select the **Header** text. Choose **Home** and click the **Font Dialog Box Launcher** 🔲 .

2 Under **Effects**, select the **Hidden** check box. Click **OK**. Double-click the document.

3 Choose **File>Check for Issues>Inspect Document**. Click **No**.

4 **ⓘCHECK** Your dialog box should look like Figure 3.27.

5 Click **Inspect**.

6 **ⓘCHECK** Your dialog box should look like Figure 3.28.

7 Review the inspection results. Click the **Remove All** buttons for **Comments, Revisions, Versions, and Annotations**, and **Hidden Text**.

8 Click **Close**. Note that all the hidden data and text and markup changes have been removed from the document.

9 Save your file.

➡ *Continue to the next exercise.*

EXERCISE 3-13
Use the Document Inspector to Reveal and Remove Hidden Data

Before you share a document with others, you can inspect the document for hidden data or personal information in the document or in its properties. For example, the document might reveal details about your organization or its members that should not be shared publicly. If several people worked on a document, or there were several drafts of the document, it might also contain comments and markup that you may want to delete or that you do not want others to see.

FIGURE 3.27 Document Inspector
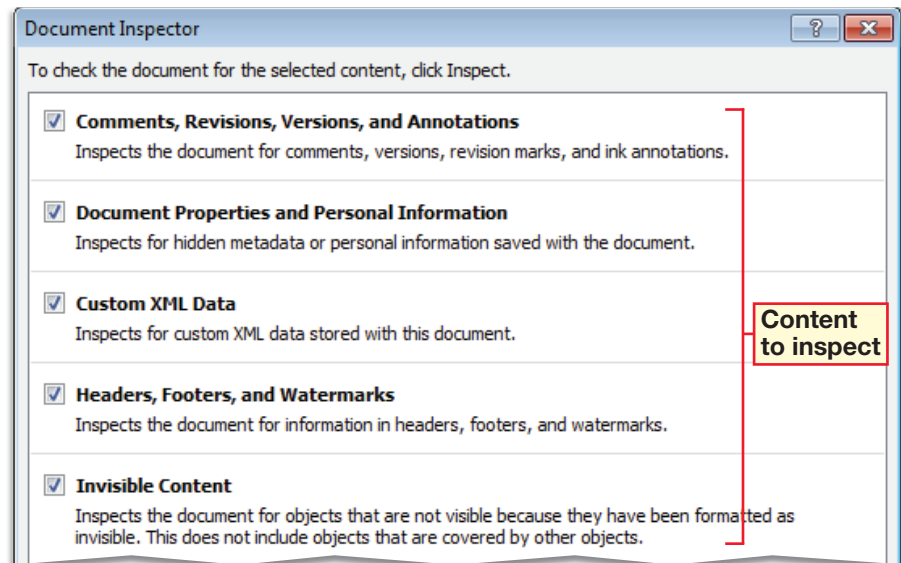
FIGURE 3.28 Document Inspector inspection results
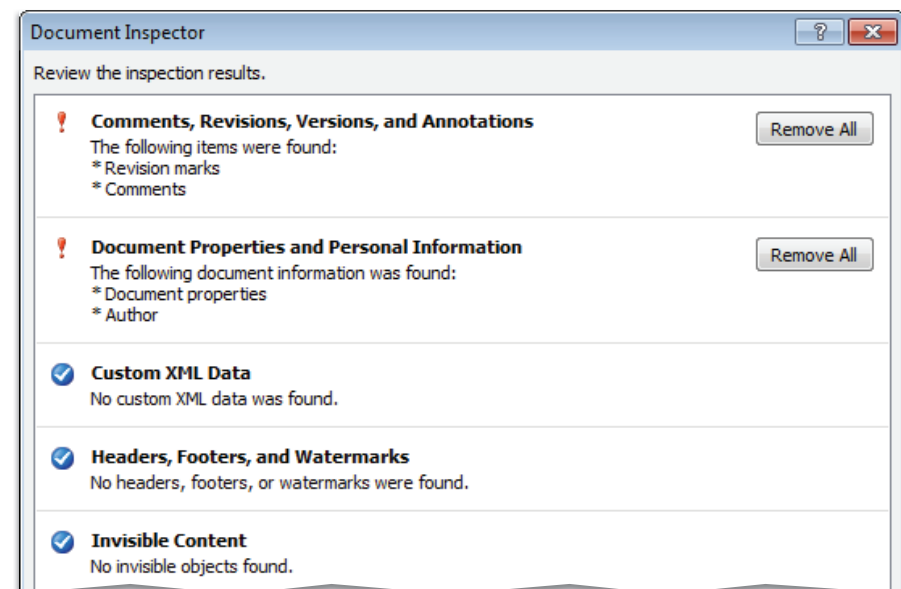
1. In your **Resources** file, choose **File>Info>Protect Document>Add a Digital Signature**. Click **OK**.

2. In the **Sign** dialog box, under **Purpose for signing this document**, key: Approval. Click **Sign**. Click **Yes**. Click **OK**

3. Click **View Signatures**.

4. **⚫CHECK** Your screen should look like Figure 3.29.

5. In the **Signatures** task pane, hold the pointer over the signature and click the drop-down arrow.

6. Click **Remove Signature**. Click **Yes**. Click **OK**. Scroll down. Click under the last sentence in the document. Press ⌷ENTER⌷.

7. Choose **Insert>Text> Signature Line**. Click **OK**.

8. In the dialog box, under **Suggested signer**, key: Elena Russo. Click **OK**.

9. Right-click the **Signature line**. Click **Sign**. Click **OK**. In the signature box, key: Elena Russo. Click **Sign**. Click **Yes**. Click **OK**.

10. **⚫CHECK** Your screen should look like Figure 3.30. Close your file.

EXERCISE 3-14
Use a Digital Signature to Authenticate a Document

You can attach an invisible **digital signature** to a document that you send to ensure that the document came from you. You must first obtain, or create, a **digital certificate**, which is an attachment that verifies the identity of the sender. Microsoft Word also allows you to add a visible **signature line** to a document that verifies the integrity of the document. Signature lines allow users to paperlessly "sign" important documents, such as contracts and other business agreements. When the signature line is signed, a digital signature is automatically added to authenticate the identity of the signer.

FIGURE 3.29 Document with an invisible digital signature added
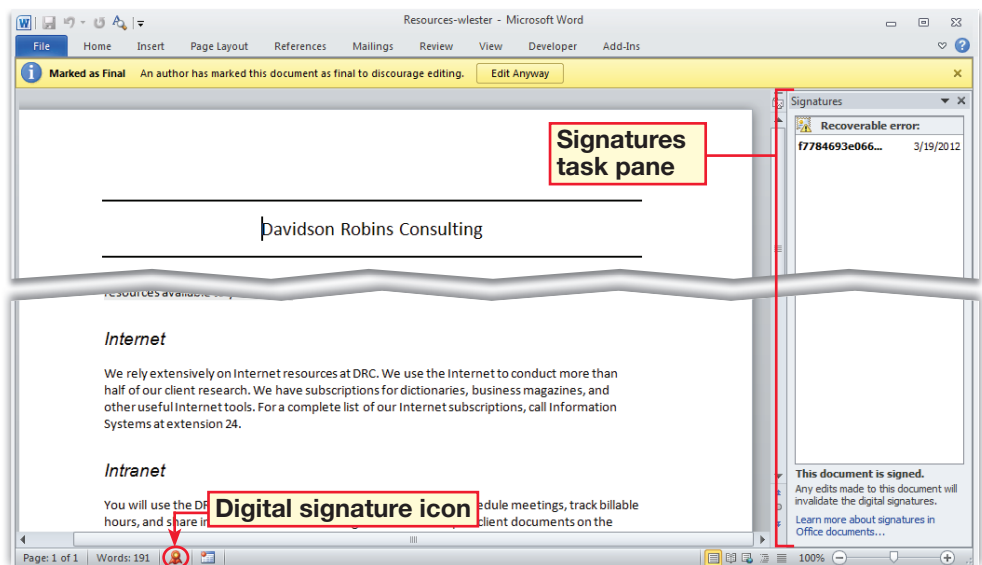
FIGURE 3.30 Document with signature line added
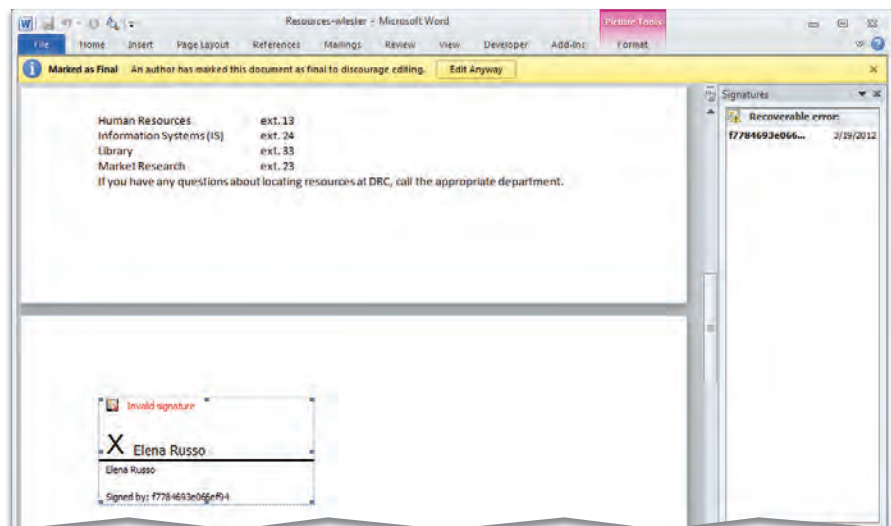
What's Your Message?

When you have information to present, think about which medium, or format, will most effectively communicate your message to your particular audience. For example, Excel is an excellent tool for organizing numbers, but it is not very good for presenting information as text.

Consider using Excel to organize numerical data, Word to create a written report that people can read on their own, and PowerPoint to present summarized information to a group.

You can also combine features from different applications to present your message in various ways. For example, a PowerPoint presentation can use charts from Excel to illustrate numerical information. If any points need to be discussed in detail, the presenter can provide a Word document to support the presentation.

MEET THE MANAGER

Bob Shaeffer is the owner and manager of Fischer's Flowers in Chicago, Illinois. He feels that young working people need to be especially concerned with the way they communicate with their managers. In all communications, Bob says, young employees should "listen, learn, and show respect." First, young workers should understand their manager's expectations. Then they can "look for ways to increase their value on the job. One way is to communicate with creativity and knowledge."

Good communication skills are an important part of any job.

SKILLBUILDER

1. **Discuss** In a given situation, what makes one form of communication better than another?
2. **Connect** Describe a situation in which you did not communicate clearly. What was the result? How could you have better presented your ideas?
3. **Evaluate** Reread the last sentence in the Meet the Manager section above. What do you think of Bob Shaeffer's advice? How does communication affect one's value in the workplace? How can communication increase your value on the job?

Royalty-free/BananaStock/Alamy Images

Vocabulary

Key Terms

balloon

combined document

Compatibility Checker

digital certificate

digital signature

editing restrictions

formatting restrictions

ink color

markup

Mark as Final

password

Reviewing Pane

signature line

Track Changes

Track Changes Options

Track Formatting

Track Moves

version

Academic Vocabulary

exempt

revert

Review Vocabulary

Complete the following statements on a separate piece of paper. Choose from the Vocabulary list on the left to complete the statements.

1. A(n) ———————— verifies that a document came from the signer. (p. 93)

2. You can set insertions and deletions to appear in a ———————— in the margin. (p. 80)

3. You can ———————— specific users from editing restrictions. (p. 87)

4. The ———————— will tell you what features will not work in previous versions of Word. (p. 91)

5. ———————— allow(s) you to prevent any formatting changes from being made to a document. (p. 86)

Vocabulary Activity

6. Create a true or false quiz using six vocabulary words from this lesson.
   A. Write six sentences. Use a different vocabulary word from this lesson in each sentence. Make some of the sentences true and some false.
   B. On a separate sheet of paper, create an answer key that indicates which statements are *true* and which are *false*.
   C. With your teacher's permission, exchange quizzes with a classmate.

Review Key Concepts

Answer the following questions on a separate piece of paper.

7. Which command will mark a document as final? (p. 90)
   A. File>Publish> Mark as Final
   B. Home>Editing> Finalize
   C. Review>Changes> Mark as Final
   D. File>Info> Protect Document

8. Which feature do you use to authenticate a document? (p. 93)
   A. Password
   B. Digital signature
   C. Comments
   D. Track Changes

9. Which command opens the Restrict Formatting and Editing pane? (p. 86)
   A. Review>Protect> Protect Document
   B. Review>Proofing> Protect
   C. Review>Protect>Restrict Editing
   D. File>Options> Trust Center

10. Which of the following can appear in balloons in the margins? (p. 80)
    A. Comments
    B. Format changes
    C. Moved text
    D. All of the above

1. **Insert the Date and Time and Change Tracking Options** DATA FILE

Follow the steps to complete the activity.

FIGURE 3.31 Date and Time dialog box

1 Open the data file **Reservations.docx**. Save as: Reservations-[your first initial and last name]1.

2 Choose **Insert>Header & Footer>Header** 📄.

3 Select **Edit Header**.

4 Choose **Design>Insert> Date & Time** 🔲.

5 In the **Date and Time** dialog box, select the format shown in Figure 3.31. Click **OK**.

6 Select **Review>Tracking> Track Changes** 📝 drop-down arrow. Select **Change Tracking Options**.

7 In the **Track Changes Options** dialog box, change the **Insertions Color** to **Pink**. Click **OK**.

8 ⓘ**CHECK** Your screen should look like Figure 3.32. Save and close your file.

FIGURE 3.32 Date and time in header

2. Change Reviewers Options

Follow the steps to complete the activity. You must complete Practice It Activity 1 before doing this activity.
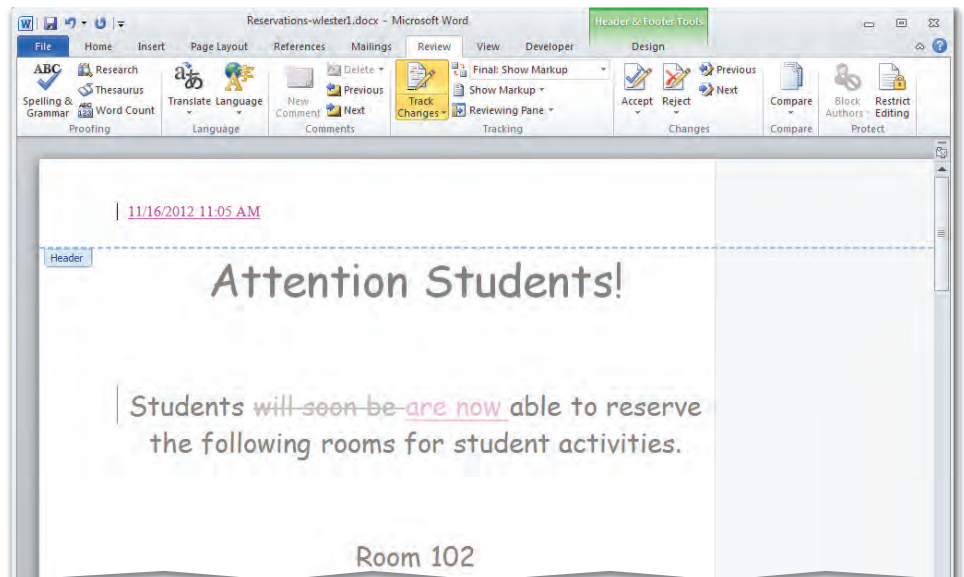
1 Open your **Reservations-1** file. Save as: Reservations-[your first initial and last name]2.

2 Select **Review>Tracking> Show Markup** 📄.

3 Click **Reviewers**. Click **Isabelle Michaud**.

4 Click **Reviewers**. Click **Jae Kim**.

5 Choose **Track Changes> Change Tracking Options**.

6 In the **Track Changes Options** dialog box, click the **Color** drop-down arrow to the right of **Deletions**. Select **Blue**. Under **Balloons**, click the **Margins** drop-down arrow. Select **Right**. Click **OK**.

7 Choose **Show Markup> Balloons**. Select **Show Only Comments and Formatting in Balloons** (see Figure 3.33).

8 ℹ️**CHECK** Your screen should look like Figure 3.34.

9 Save and close your file.

FIGURE 3.33 Specifying for comments and formatting to appear in balloons
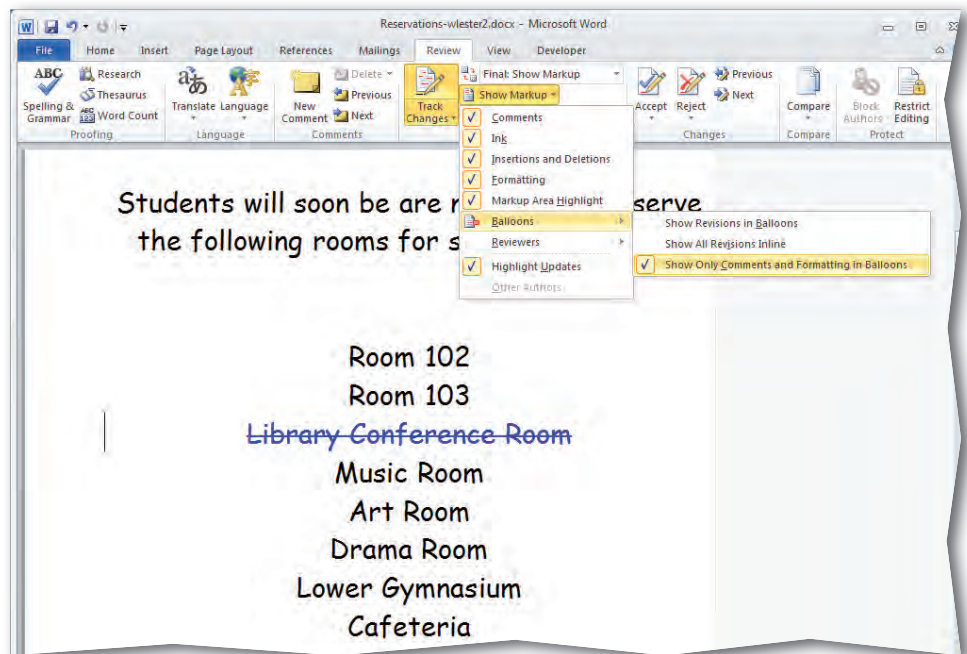
FIGURE 3.34 Deletion in blue ink and comment in balloons

Step-By-Step

3. Set Restrictions

Follow the steps to complete the activity. You must complete Practice It Activity 2 before doing this activity.

FIGURE 3.35 Editing restrictions
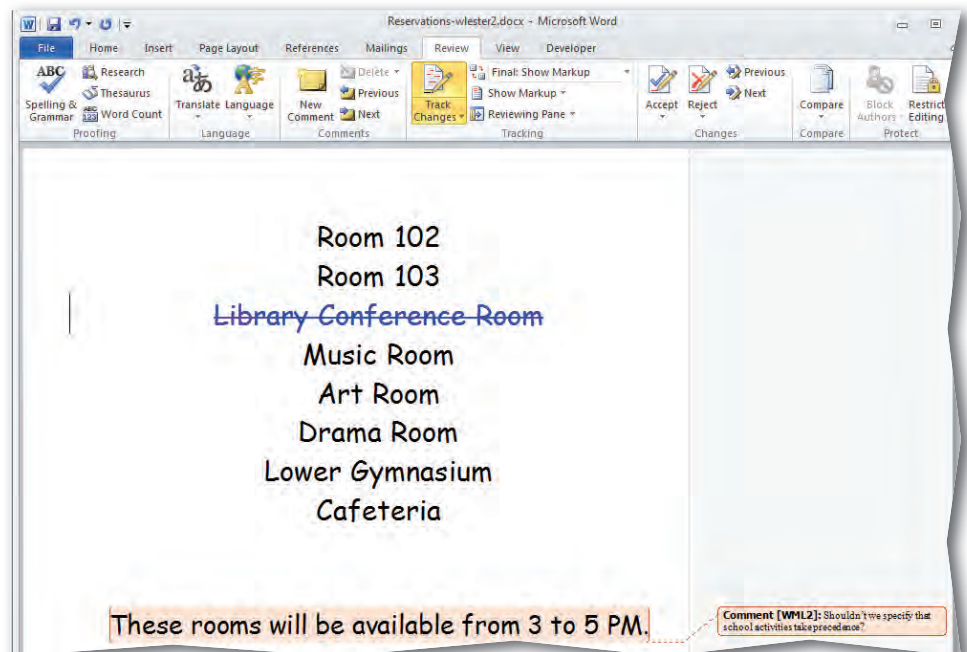
1. Open your **Reservations-2** file. Save as: Reservations-[your first initial and last name]3.

2. Choose **Review>Protect> Restrict Editing** 🔒. In the task pane, under **Editing restrictions**, click the **Allow only this type of editing in the document** check box.

3. Click the **Editing restrictions** drop-down arrow. Click **No changes (Read only)**.

4. In the document, select the list of rooms. Under **Exceptions (optional)**, click the **Everyone** check box (see Figure 3.35).

5. Click **Yes, Start Enforcing Protection**.

6. In the **Enter new password (optional)** box, key: vacation. In the **Reenter password to confirm** box, key: vacation. Click **OK**. Deselect the text.

7. 🛈**CHECK** Your screen should look like Figure 3.36. Save and close your file.

FIGURE 3.36 Password-protected document with editing restrictions

4. Combine Documents

You are in charge of sending out a flyer about an upcoming barbecue at your company. Your supervisor has made some edits to the flyer. You decide to combine your supervisor's version with your own to ensure that your final version contains all the latest changes and comments.
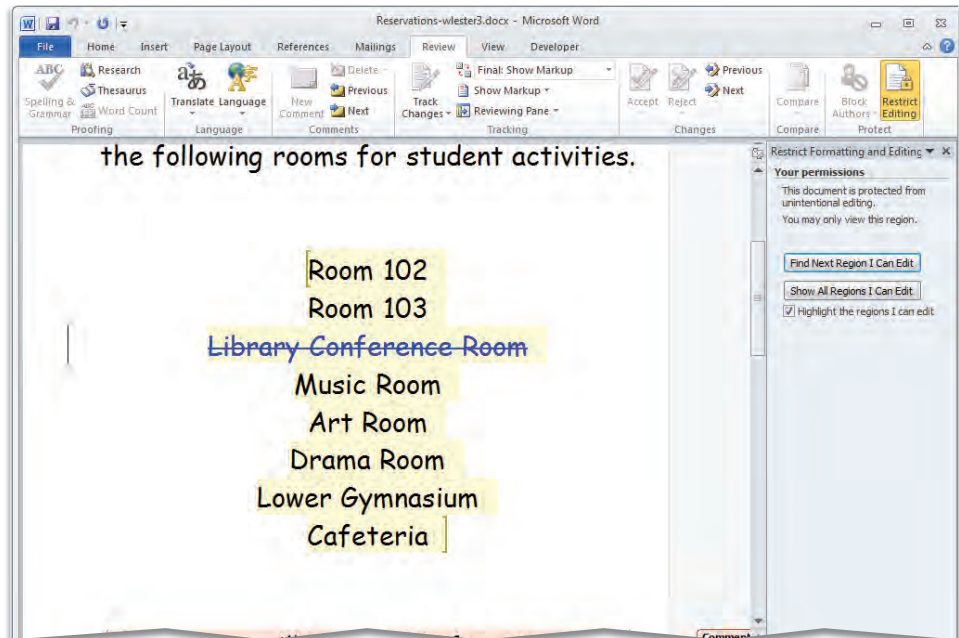
Step-By-Step

1. Open the data file **Barbecue.docx**. Save as: Barbecue-[your first initial and last name]4.

2. Choose **Review> Compare> Compare> Combine** .

3. In the **Combine Documents** dialog box, click the **Original document** drop-down arrow. Select the **Barbecue-original** data file. Select your **Barbecue-4** file in the **Revised document** box. Click **OK**. In the dialog box, select your file, not the original. Click **Continue with Merge**.

4. Save your combined document as: Barbecue-Combined-[your first initial and last name]4. Show both source documents.

5. **CHECK** Your screen should look like Figure 3.37.

6. Hide the source documents and accept all changes.

7. **CHECK** Your screen should look similar to Figure 3.38. Save and close all documents.

FIGURE 3.37 Combined document with source documents
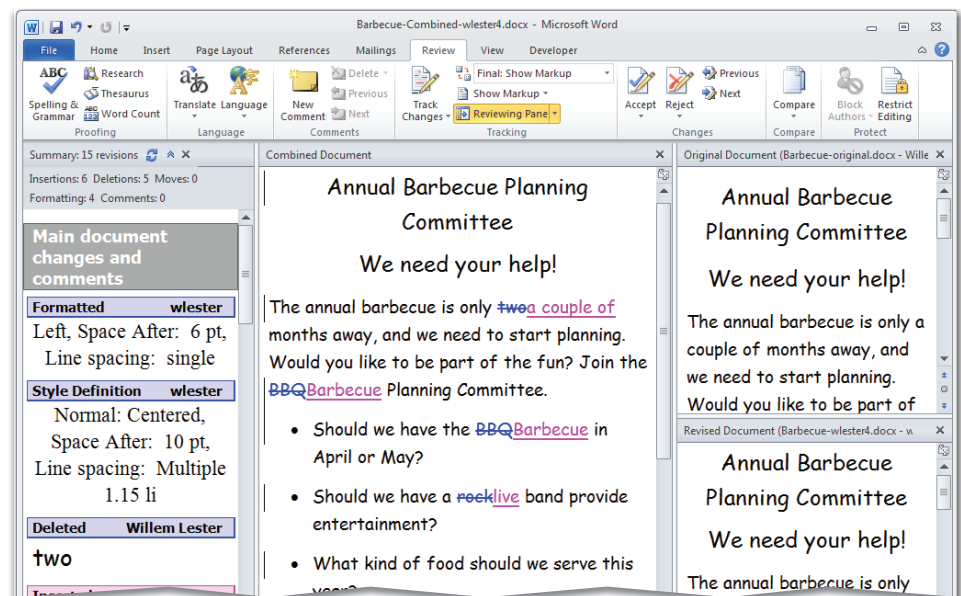
FIGURE 3.38 Combined document with changes accepted

5. Save a Document As a Previous Version
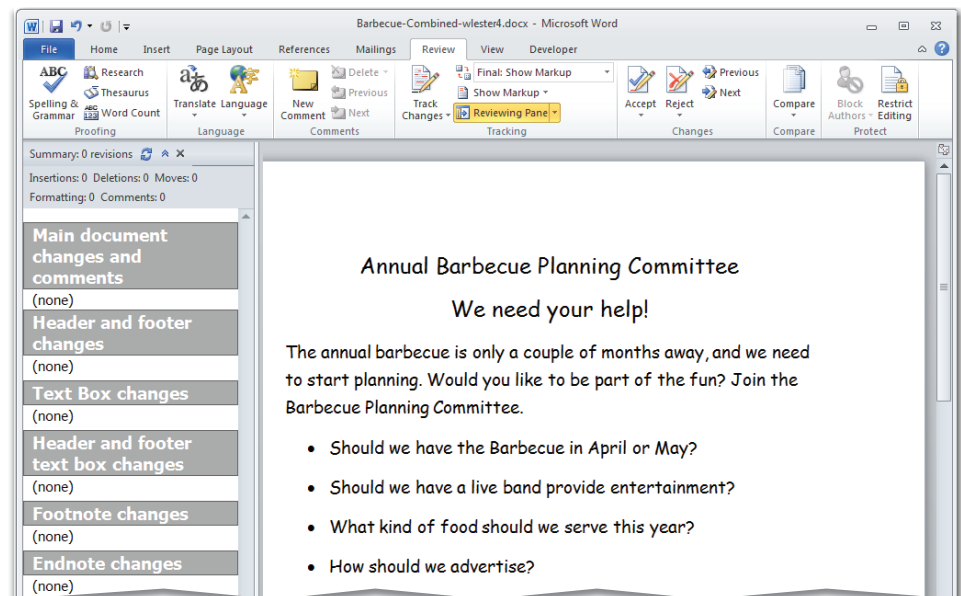
1. Open your **Barbecue-Combined** file. Save as: Barbecue-Combined-[your first initial and last name]5.

2. Select the text **Committee members** and the four names below it.

3. Use the **Font** dialog box to format the selected text as hidden text. Save your file.

4. Run the **Document Inspector**.

5. **①CHECK** Your dialog box should look like Figure 3.39.

6. Remove all of the content that is not to be shared, including document properties, hidden text, and custom XML data.

7. Save your file as a **Word 97-2003** document.

8. **①CHECK** Your screen should look like Figure 3.40.

9. Close your file. Exit Word.

Some of your coworkers do not have access to Office 2010 or 2007, so you decide to save a version of your flyer as a Word 97-2003 file. Your supervisor also requests that you hide the list of committee members. You use the Compatibility Checker to make sure that your coworkers will have no problems opening the file.

FIGURE 3.39 Document Inspector dialog box
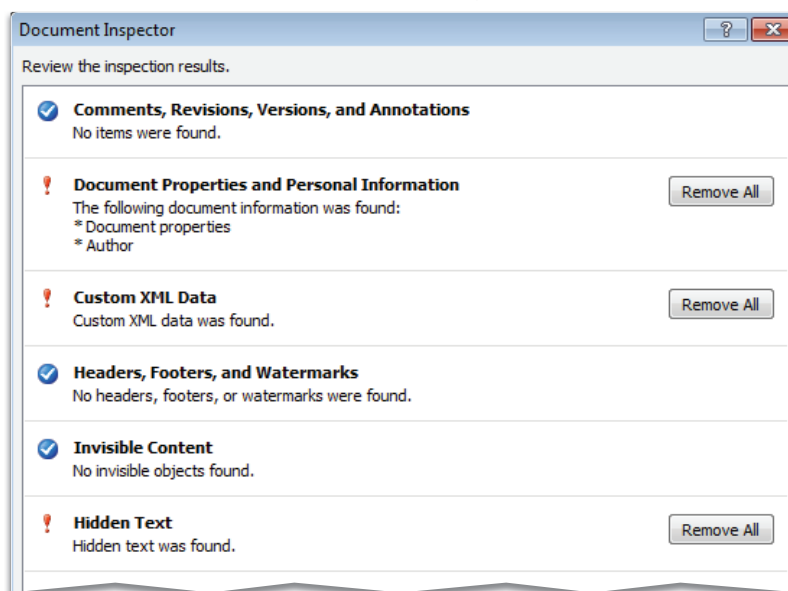
FIGURE 3.40 Document saved as previous version
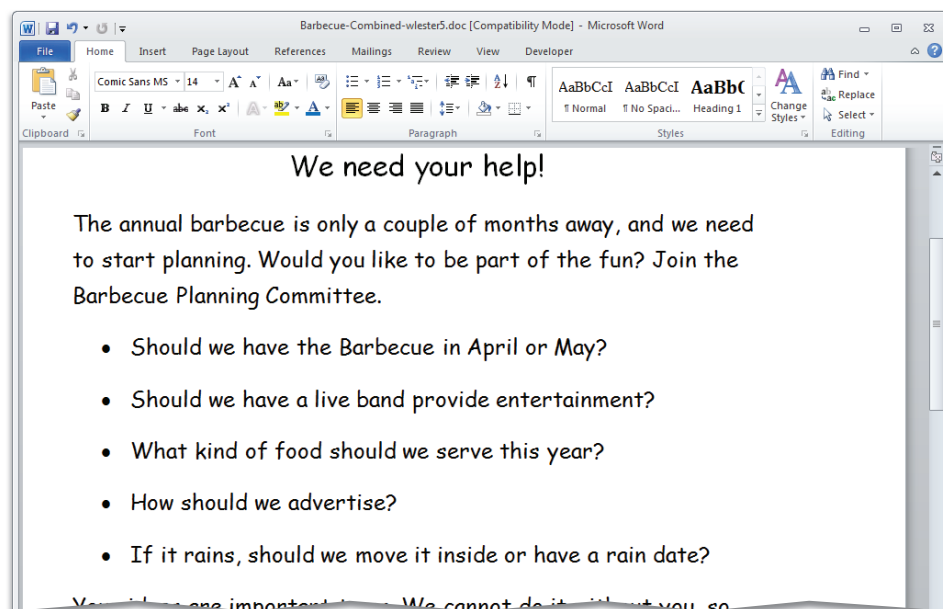
6. Beyond the Classroom Activity

Language Arts: Collaborate with a Classmate You and a classmate are in charge of organizing a car wash to raise money for your high school band's trip to Washington, D.C. You are working together on a flyer to promote a fundraising car wash.

- Create a flyer that includes the location, time, and cost of the car wash, as well as the reason for it. Save your flyer as: adv-w3rev-[your first initial and last name]6.docx.
- Use the Ribbon or Backstage to add a password to the flyer. Create editing restrictions that allow part of the document to be edited.
- Exchange flyers with another student. Using **Track Changes**, insert and edit comments and make any necessary edits and send the file back to the original writer.
- In your document, change the ink colors of the reviewer and the balloon options.

7. Standards at Work Activity

Microsoft Office Specialist Correlation
Word 1.4 *Share documents.*

Save Document Versions Your supervisor asked you to create two versions of his restaurant's menu, one in **PDF** format to be printed for use in the restaurant and another in **.doc** format, which will be sent via e-mail or Internet fax to people who may not have access to Office 2007 or 2010.

- Create a menu with at least seven items, including prices.
- Insert and format at least one graphic, table, or chart.
- Save your file as: adv-w3rev-[your first initial and last name]7.pdf.
- Return to your .docx file and run the **Compatibility Checker** and remove all items that are incompatible with Word 97-2003.
- Save your file as: adv-w3rev-[your first initial and last name]7.doc.

8. 21st Century Skills Activity

Explore Resources at Your School Your school makes many resources available to you—a computer center, a career center, or guidance counselors. You are writing a short feature for the school newspaper about one of the school's resources. Learn three facts about this resource that other students may not know. Key a paragraph explaining the benefits of this resource. Follow your teacher's instructions to save your paragraph to the SharePoint server using Windows Live SkyDrive as: adv-w3rev-[your first initial and last name]8.docx.

Before You Begin

The Writing Process As you work on a project, focus on each step of the writing process separately. If you try to research, write, and revise all at the same time, you will work more slowly. Doing projects in phases can lead to better results.

Reflect Once you complete the projects, open a Word document and answer the following questions:

1. How does editing someone else's work compare to editing your own?

2. How do you decide when a project is ready to be marked as final?

9. Research Driving Safety

DATA FILE **R**

Language Arts: Conduct Research Your high school is organizing a program about driving safety. You have been asked to help research the topic and contribute what you learn to an Internet blog. Open the data file **Driving.docx**. Choose four of the driving safety topics and research them to find at least one tip regarding how you can become a safer driver.

- Key each tip under the topic that it addresses.
- Set the appropriate editing restrictions so that only the topics that you are adding to can be edited.
- Use the Ribbon or Backstage view to apply the password *drivesafe* to the document.

Save your document as: Driving-[your first initial and last name]9.docx.

10. Create a Blog Post

R

Language Arts: Work with Others to Complete Work Exchange your **Driving-9** file with another student. Each of you should make at least three edits and add at least one comment to the file. Save and return the files to the original author.

- Open your own **Driving-9** file.
- Set your options so that you can see your classmate's edits inline.
- Show all comments in balloons in the left margin.

Save your document as: Driving-[your first initial and last name]10.

11. Mark Document as Final

R

Language Arts: Revise a Document You are ready to finish editing your driving tips. Before you consider your work final, you need to decide which revisions to accept and which to reject.

- Open your **Driving-10** file.
- Review all of the edits made by your classmate.
- Evaluate and respond to some comments.
- Share the file with your classmate once more.
- Accept or reject each edit, and delete the comments. ▪
- Mark your document as final.

Save the file as: Driving-[your first initial and last name]11. Then, follow your teacher's instructions to register a new blog account and publish your own blog post or send the file as an Internet Fax from Microsoft Word.

In this activity, you will use your Word skills to make a booklet about amphibians.

Create a Booklet to Organize Information

Scientists use a system called *taxonomy* to classify all living things in the world. Taxonomy breaks everything down into various categories. Each category is then broken down into six (or more) levels of increasingly specific classifications. An *amphibian* is a creature that spends time in both the water and on land. There are three orders of amphibians:

- Frogs and toads make up the order Anura.
- Salamanders and newts make up the order Urodela.
- Caecilians make up the order Apoda.

Create a four-page booklet about amphibians.

1 Use the Internet to research amphibians. Learn the names of two common families and three orders. Also learn the names of two of the species in each family.

2 Open a Word document. Insert a heading on Page 1 called **Amphibians**. Create and format headings for **Frogs and Toads**, **Salamanders and Newts**, and **Caecilians** on the remaining three pages. (Hint: Use Level 2 headings.) (p. 5)

3 Create a bulleted list of the species under each heading. List the common and scientific names. (p. 6)

4 Modify an existing theme to give your document a unified look on each page. (p. 51)

5 Insert a graphic that represents each family. Scale the graphics as needed. (p. 14)

6 Insert captions for each graphic. (p. 57)

7 Apply a password to the document. (p. 88) Save as: Amphibians-[your first initial and last name].

You can create Word documents to help you organize information about different topics, such as amphibians.

John Pitcher/Age Fotostock America, Inc.

Respecting Diversity

Consider your family, your school, your neighborhood, or your workplace. It is likely that you see many differences among people in all three environments. Americans have a wide variety of interests, abilities, and backgrounds. After all, if everyone were the same, life would be far less interesting!

Appreciating Diversity

By respecting diversity, we learn to appreciate the differences in backgrounds and beliefs, and we learn to look at things from different points of view. A strong democracy promotes positive attitudes, tolerance, and respect for others. Do you appreciate diversity? Ask yourself these questions:

- Do I accept people as they are?
- Do I value the ways people are different than I am?
- Do I share my interests and strengths with other people?
- Do I have friends from different backgrounds and with different interests?

Are there things that you could start (or stop) doing today to respect diversity more? Ask yourself these questions:

- Do I make jokes about groups of people who are different than I am?
- Do I exclude people because they are different than I am?
- Do I make assumptions about people before getting to know them?
- Do I fear that others are making assumptions about me?

Our communities are rich with resources. When all segments are respected and utilized, everyone involved benefits.

CASE STUDY

Your class is planning its annual activity for a Saturday in the spring. Everyone in your class voted, and the winning activity is a rigorous hike in the mountains. Chris, one of your classmates, points out that a hike would exclude students with certain physical disabilities, injuries, and medical conditions. He thinks that it would be unfair to exclude some students. Kelly replies, "Everyone had a chance to vote, and a hike was the winner. Why should we miss out on hiking just because some people cannot go?"

YOU DECIDE

1. **Restate** What do Chris and Kelly disagree about? Why does Kelly think her explanation is acceptable?

2. **Convince** You think your class should choose an activity in which everyone can participate. How would you respond to Kelly's arguments?

APPLICATION ACTIVITY

3. **Create a Form** Create a form that allows your classmates to vote on activities that would allow everyone to participate. List at least six activities. Create a check box for each activity. In the form, explain that each student can vote for up to three activities. Be sure to protect the form.

Cater to Your Customers

You and a friend are starting a catering business. Before you launch your business, you need to design a flyer, create a sample menu, create a customer order form, and send out a mailing to introduce your new business.

Part 1: Design a Flyer

Goal You need a flyer promoting your business that you can post on local bulletin boards and hand to potential customers.

Create Use Word to create an attractive and informative one-page flyer to encourage potential customers to call you. In your flyer:

- Include your company's name, address, telephone number, and Internet address.
- Include a short description of your business.
- Format the text so it is easily readable.
- Insert a graphic from Clip Art that represents your business.
- Resize, crop, or rotate the graphic to make the best use of the space on the page.
- Apply a theme and border to the flyer, or choose a background color and Fill Effects.

Self Assess Use the Have You …? checklist to review your flyer. Make sure your flyer contains all the necessary items and formatting. Follow your teacher's instructions for naming the document and saving it to your Portfolio folder.

When finished, proceed to Part 2.

Have You…?

- ☑ Limited your flyer to one page
- ☑ Included the necessary contact information for your business
- ☑ Included a short description of your business
- ☑ Formatted the text in an attractive, large font
- ☑ Included a graphic and modified it
- ☑ Added a theme or background color and Fill Effects

Royalty-free/ThinkStock/SuperStock

Part 2: Create a Sample Menu

Goal   When people become interested in your catering business, they will want to know what kinds of food you offer. You need to create a menu for your business.

Create   Use Word to create an attractive sample menu to give potential customers an idea about the types of dishes your company serves.

- Include the company name at the top of the menu and use a table to control the layout.
- Include a list of four complete dinners that your business serves and a brief description of each dinner (include main dish, side dishes, dessert, and drink).
- Include a table of dinner prices based on the number of people served. Create a table that states that a dinner costs $10.00 per person for 5–10 people; $9.00 per person for 11–20 people; $8.00 per person for 21–50 people; and $7.00 per person for 51+ people. Insert this table under each of your four dinners. Sort the information in the table in ascending order by price.
- Create and apply a custom style to the table of prices.
- Apply a password to the document to prevent other people from changing it.
- Add the **DRAFT** watermark to the document.

Self Assess   Use the Have You …? checklist to review your menu. Make sure your menu contains all the necessary items and formatting. Follow your teacher's instructions for naming the document and saving it to your Portfolio folder.

When finished, proceed to Part 3.

Jetta Productions/Iconica/Getty Images

Have You...?

☑	Included the company name
☑	Included four sample dinners
☑	Created a table of prices for each dinner
☑	Applied a custom style to the table
☑	Protected the document with a password
☑	Added a DRAFT watermark

Part 3: Create a Customer Order Form

Goal Your business will be officially running when you take your first order. You need an order form you can send to customers by e-mail. They need to be able to complete the form and send it back.

Create Use Word to create an order form. Include your company's name at the top of the form. Using **Quick Parts**, insert fields for the following information:

- The name, address, and telephone number of the customer
- The type of event
- The date and time of the event
- The number of people who will attend
- Which items they would like to order
- Whether your catering company needs to provide tables, chairs, linens, and china

Be sure to use the appropriate types of form fields. Format the form fields to make it easy to fill out the order form. Then, save the form to the Quick Styles gallery, mark the document as final, and protect the form so it cannot be changed.

Self Assess Use the Have You …? checklist to review your order form. Make sure your order form fulfills all of the requirements in the checklist. Follow your teacher's instructions for naming the document and saving it to your Portfolio folder.

When finished, proceed to Part 4.

Have You...?
☑ Included fields for all of the required information
☑ Used the appropriate types of form fields for each type of information
☑ Formatted the form fields appropriately
☑ Marked the document as final
☑ Protected the form

Digital Vision/Getty Images

Part 4: Introduce Your New Business

Goal   To help make your business successful, you decide to mail information to local businesses. You want to personalize the letters to increase the likelihood that the businesses will want to use your catering services.

Create   Use Word to create a form letter and personalize it for local businesses. Start by creating a form letter. In your letter:

- Include general information about your catering business.
- Encourage the reader to call you for more information.
- Make sure your business letter is formatted correctly. Include a letterhead with your business's contact information.
- Then use the data to create and save Building Blocks that you can reuse later.
- Insert fields for the address and greeting.
- Save your letter as a template.
- Use a digital signature to authenticate the document.

Self Assess   Use the Have You ...? checklist to review your form letter. Make sure your letter fulfills all of the requirements in the checklist. Follow your teacher's instructions for naming the documents and saving them to your Portfolio Folder.

Have You...?

✓	Included general information about your business
✓	Included fields for the address
✓	Included fields for the greeting
✓	Formatted your business letter correctly
✓	Included a letterhead in your letter with contact information
✓	Used the data in your letter to create Building Blocks
✓	Saved your letter as a template
✓	Attached a digital signature to the document

Go Online   BEYOND THE BOOK

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Go to the Online Learning Center to learn additional skills and review what you have already learned.

Microsoft OneNote
Store and share information in a single, easy-to-access location. Take notes while working in any Microsoft application.

Microsoft Outlook
Learn all about Outlook and how to use e-mail communication and scheduling?

Technology Handbook
Check your knowledge of important computer concepts.

Math Handbook
Find solutions to your math problems.

Additional Projects

Complete additional projects in the following areas:

- **Real-World Connection Projects** reinforce Microsoft Word by focusing on real-world business applications.
- **Present and Publish Projects** Use your Word skills to create exciting PowerPoint presentations and desktop publishing activities.
- **Academic Projects** Integrate academic skills while enriching your understanding of Microsoft Word.

More Online Resources
Access additional Web sites and online information relating to key topics covered in Glencoe's *iCheck Series*. Select **Additional Resources>Links**.